

SEAMS
POWERED BY ECOPORTAL



SEAMS USER GUIDE

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Mobile Application

Applicable to Mobile App

Overview

ecoPortal Connect is a mobile application that connects on-the-go users with **SEAMS (Safety, Environmental, Assurance Management System)**.

Any device?

ecoPortal connect can run on any Android or iOS device, as long as the minimum operating system specifications are met:

- iOS 11.0 (released 2017)
- Android SDK 26 (Android 8.0 - released 2017)

Be Connected

Make sure you are connected to the internet - Whilst the application works offline once it is on your device, to download from the relevant store and log in for the first time you will need to be connected via a wi-fi or mobile connection.

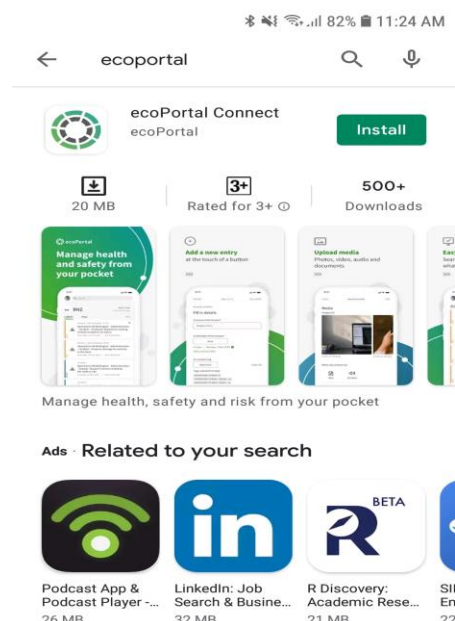
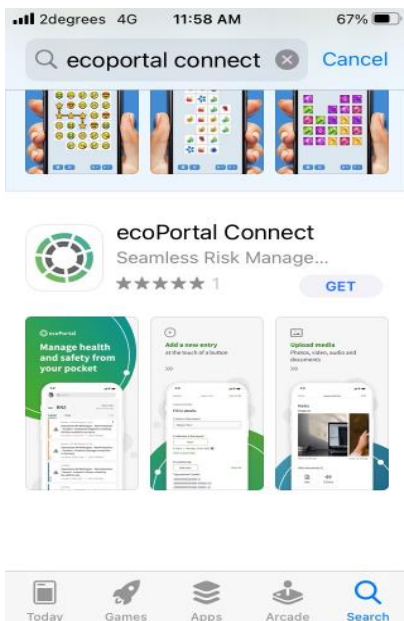
Download the Application

The first thing you need to do is download the application:

- For Apple device you can navigate to the App Store and search for ecoPortal in the search bar.
- For an Android device you can navigate to the Play Store and search for ecoPortal from there.



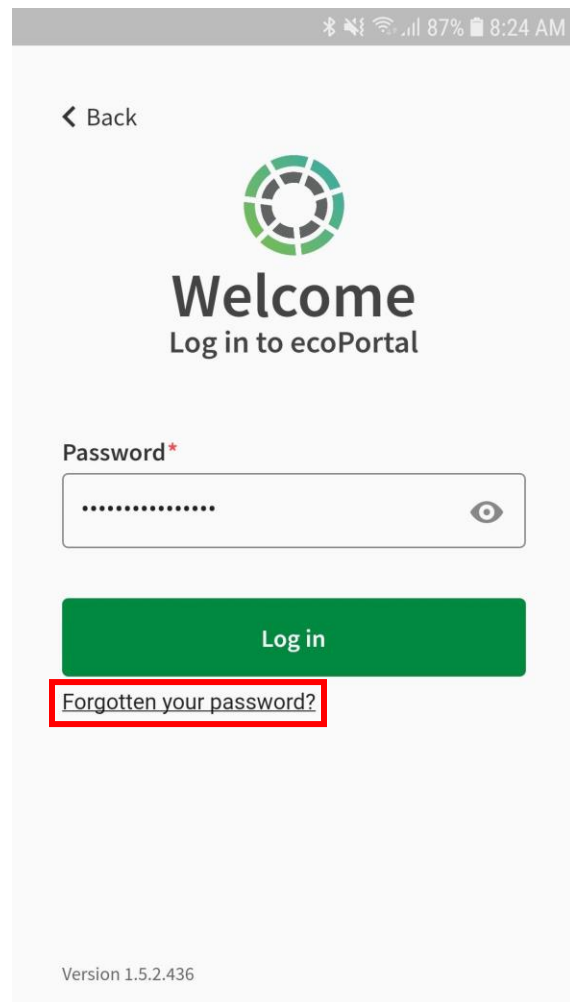
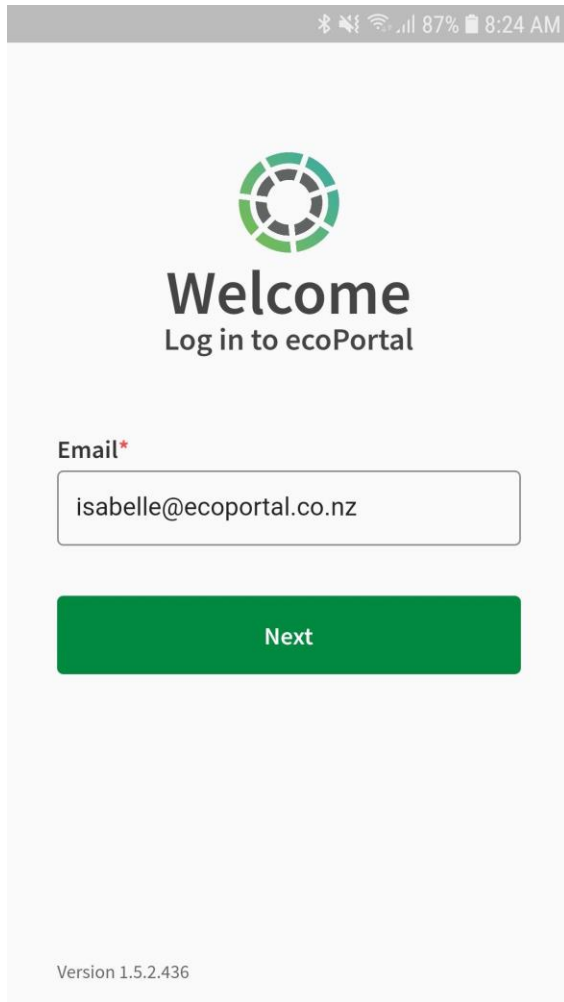
Once you've done this just tap get or install (see below). Once the application has finished downloading you'll be able to open it and get started.



Log In

When you first open ecoPortal, you will be presented with the **Login** screen.

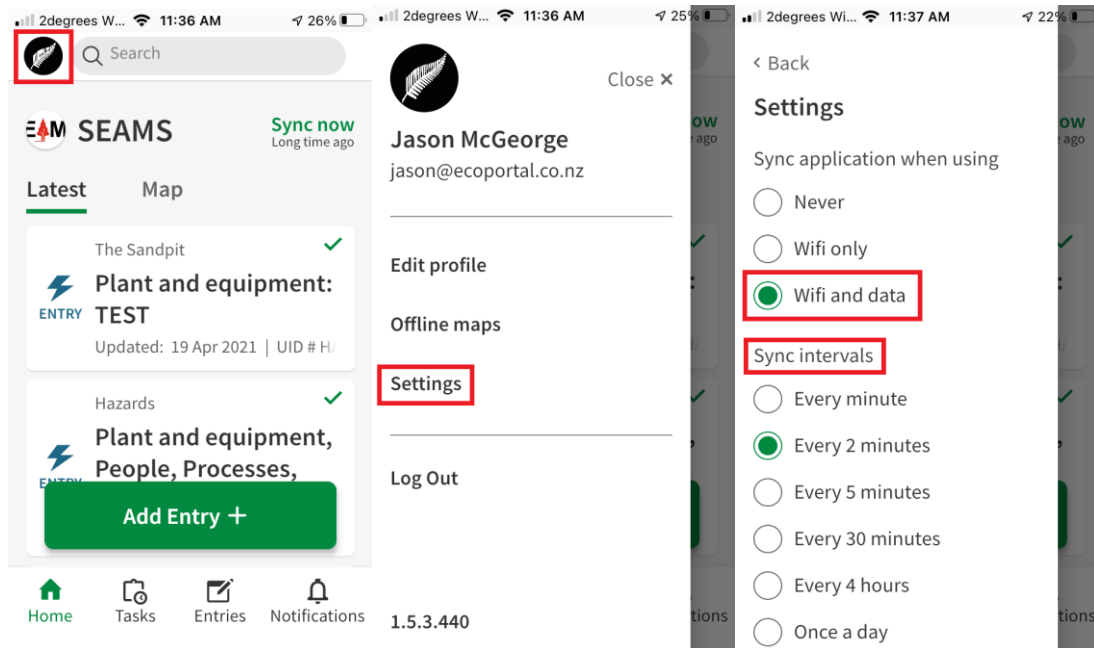
Type in your email address and tap **Next** to enter your password. If you are having trouble logging in click **Forgotten your password?** To set up a new password.



Tip: tick the **Remember me** box to save your details and automatically login next time.

Syncing with the SEAMS

Once downloaded and logged in using your **SEAMS** credentials you will need to ensure your syncing capabilities are set. To do this simply press on your account icon, select settings and choose your sync frequency:

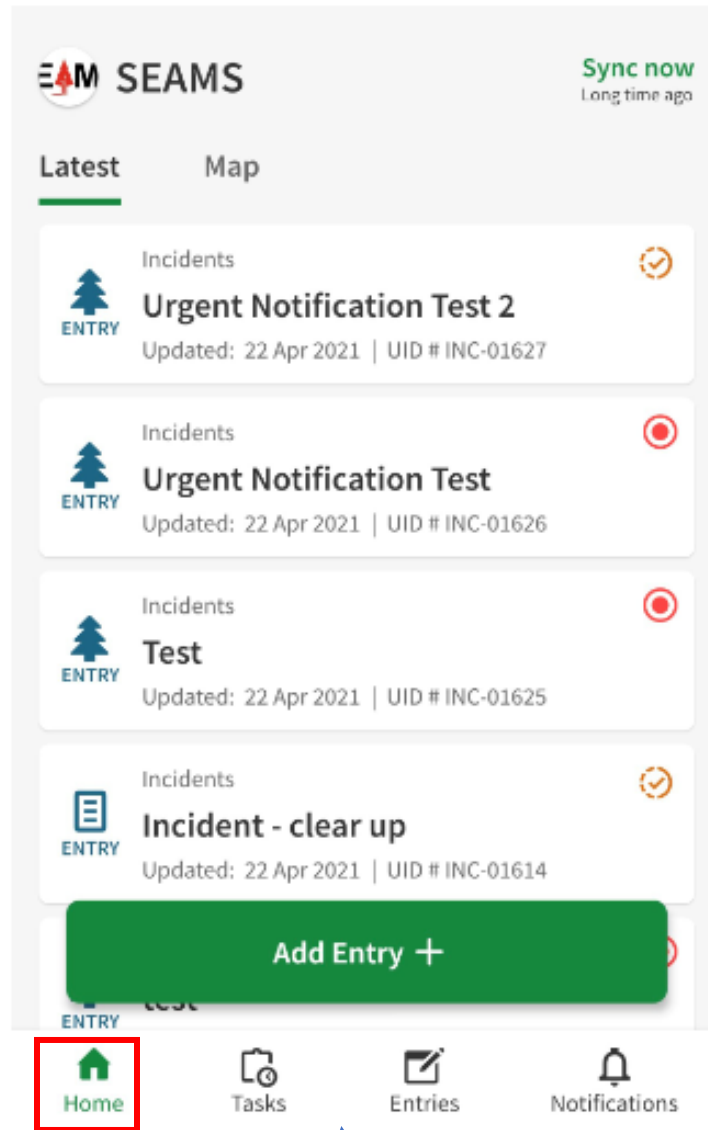


Connecting to SEAMS via ecoPortal

Once you have logged in, you will be taken to your **SEAMS** dashboard. This provides an overview of your recently logged entries and active tasks.

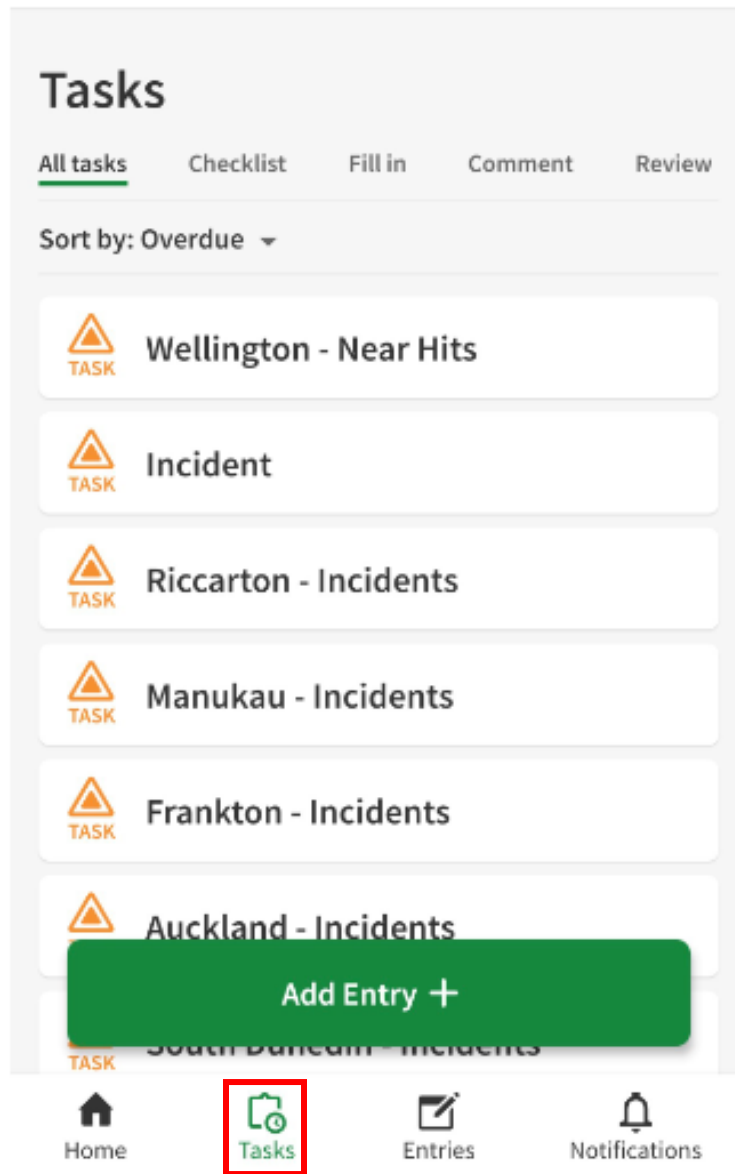
The **Menu Bar** at the bottom of the screen helps make navigating around SEAMS simple and efficient:

- **Home:** Returns you to the main home view.

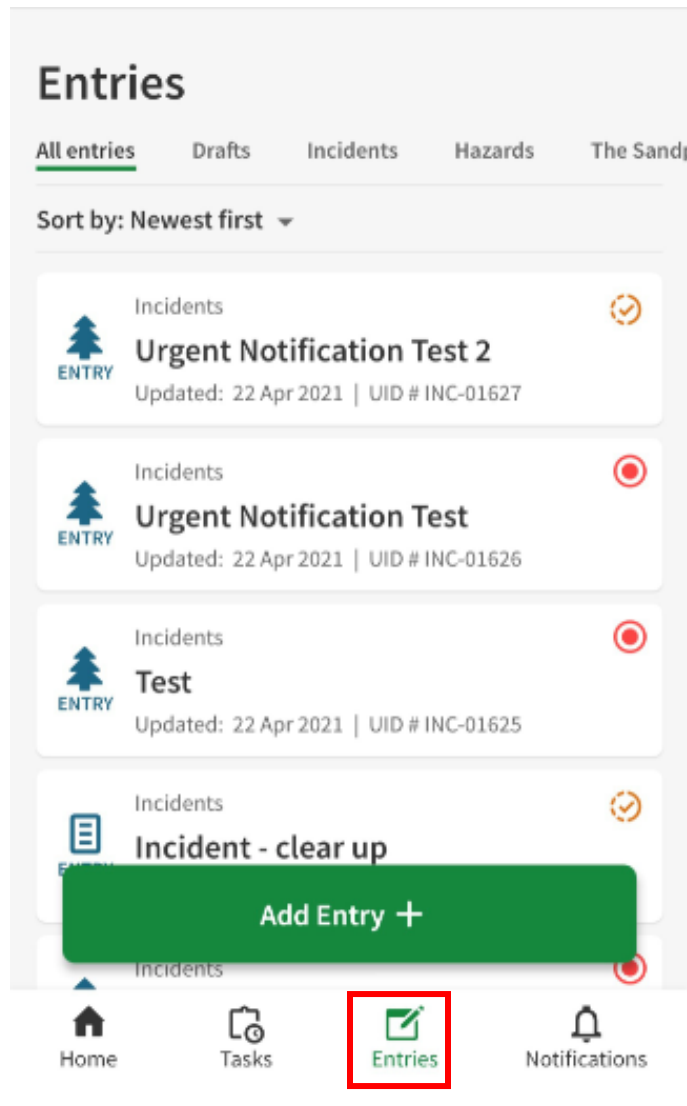


Menu Bar

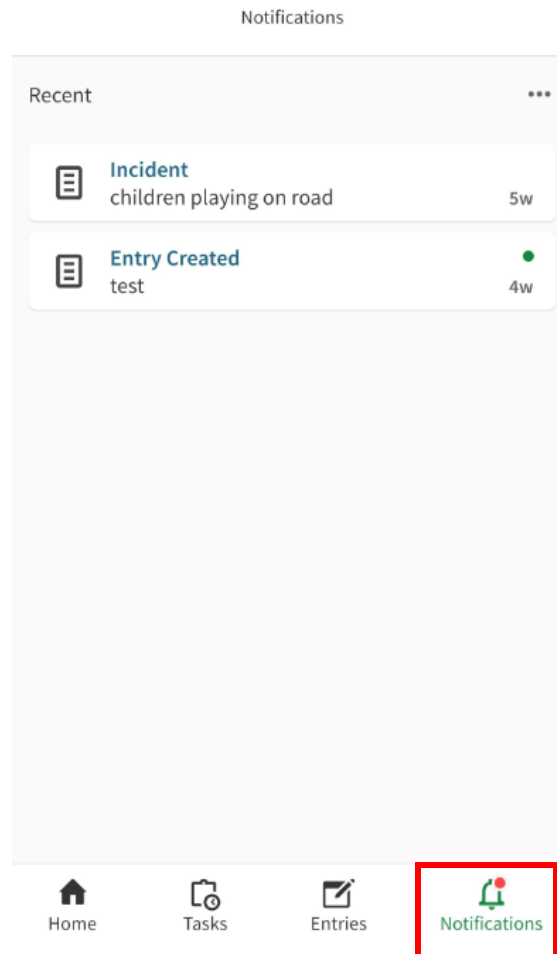
- **Tasks:** Opens a list of all active tasks assigned to you.



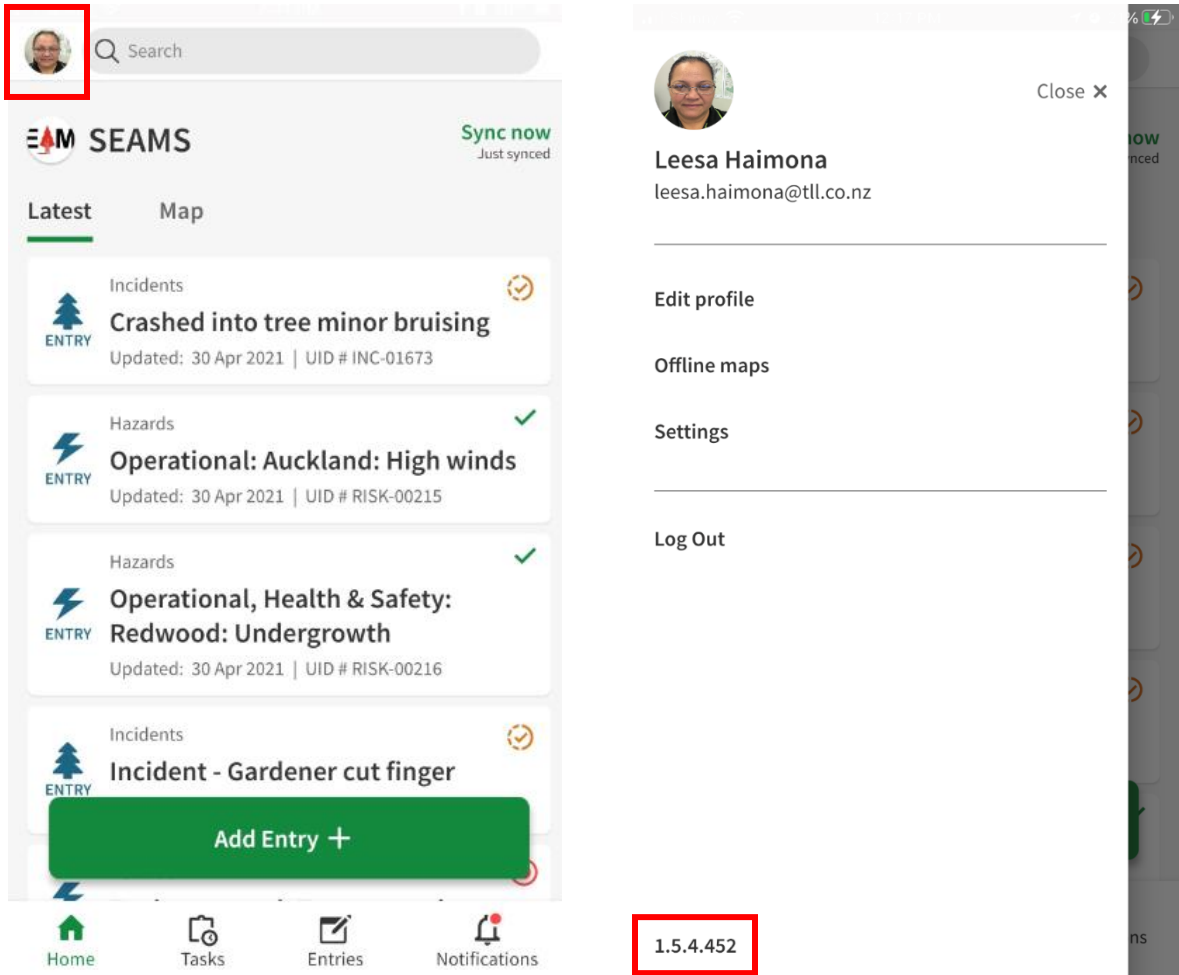
- **Entries:** Opens a list of all reports and draft entries.



- **Notifications:** Opens a list of all notifications



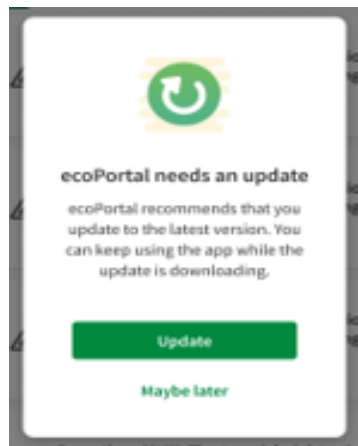
- **Clicking your profile picture in the top left corner:** Opens a side panel with profile information and general settings.



Versions

It is important that your version of ecoPortal connect is up to date also.

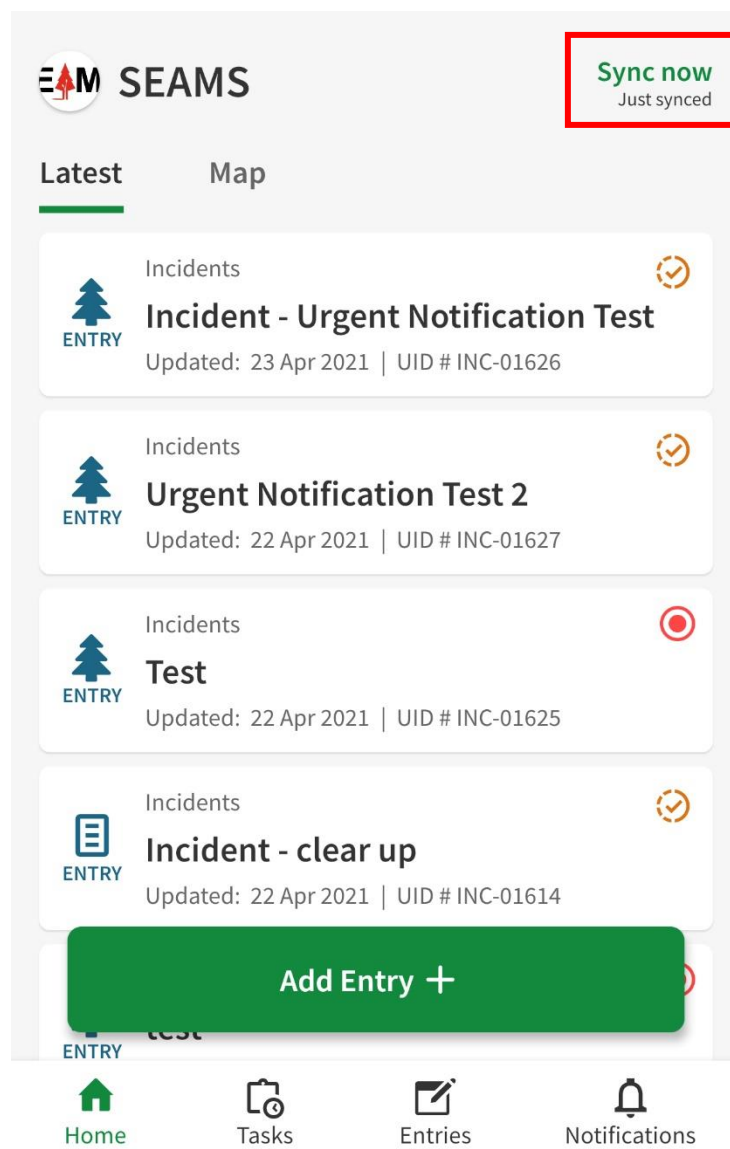
When your app is out of date a message like this may appear:



Sync Now

If you are on-the-go without internet connection, **SEAMS** lets you make reports and create entries while offline. Simply complete an entry and submit it, then navigate to **Home**.

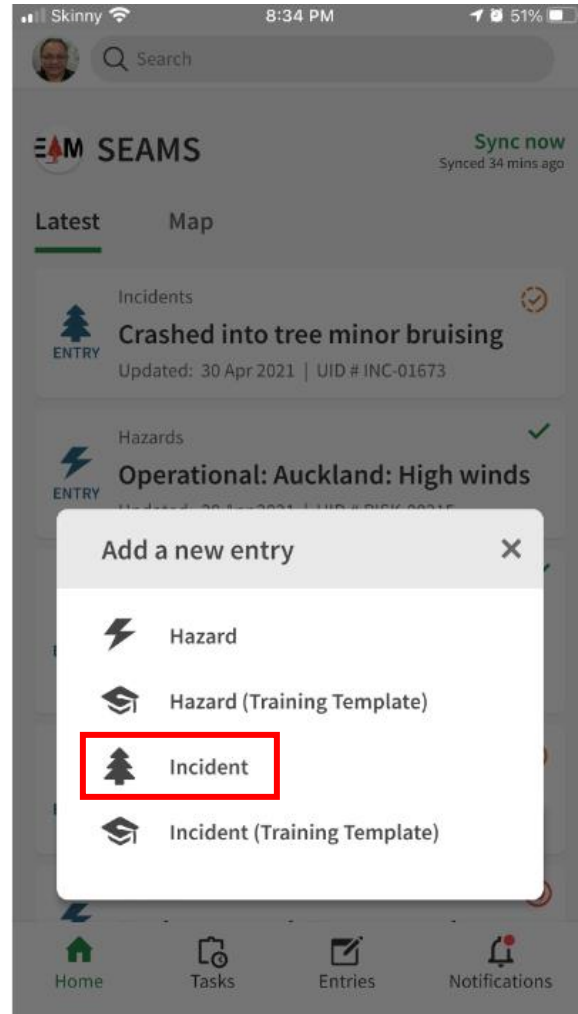
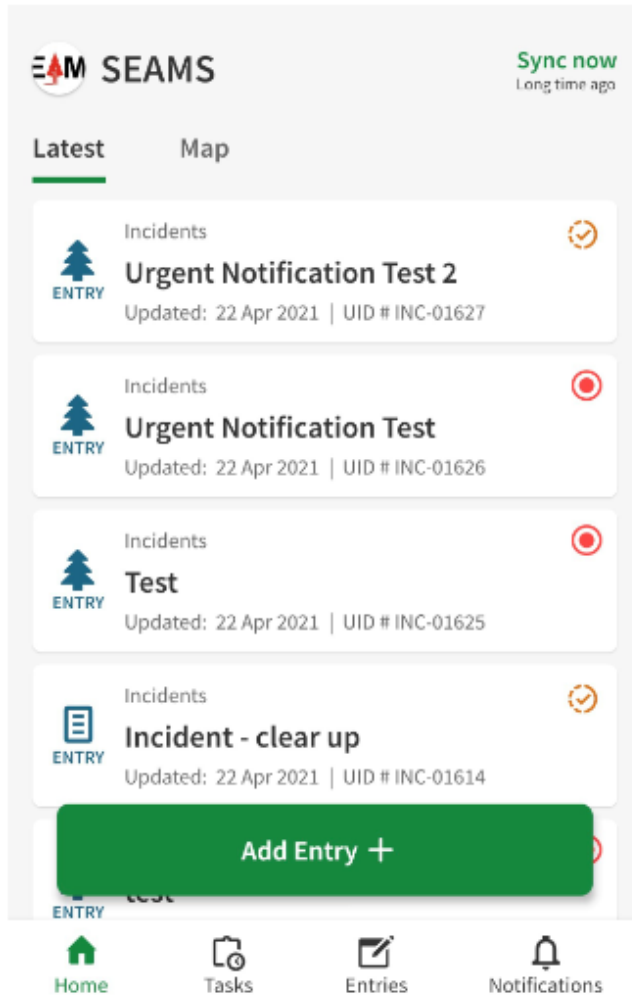
Once you have internet connection, simply tap **Sync Now** on the top right and all of your reports and entries will be synced and uploaded to the system.



Report an Incident

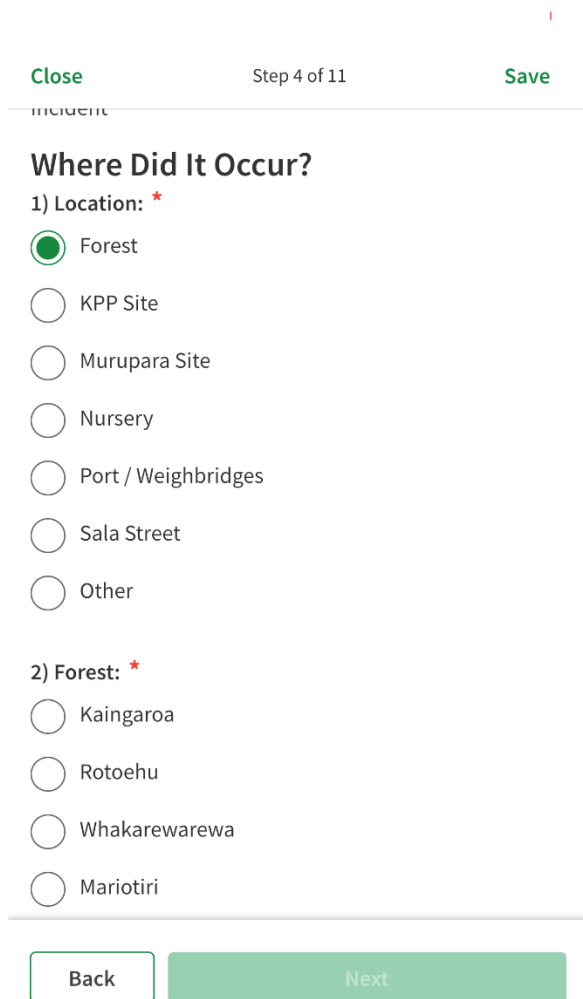
To report an incident, tap the **Add Entry +** button on your dashboard.

Then tap **Incident** under the **Add new entry** menu.



You will then be able to start filling out a new incident report.

Follow the instructions on screen to fill in each field. Some fields will open up another screen for you to input information.



Close Step 4 of 11 Save

incident

Where Did It Occur?

1) Location: *

- Forest
- KPP Site
- Murupara Site
- Nursery
- Port / Weighbridges
- Sala Street
- Other

2) Forest: *

- Kaingaroa
- Rotoehu
- Whakarewarewa
- Mariotiri

Back Next

The **Back** and **Next** buttons at the bottom of the screen will navigate you between each section of the report. You will need to fill in all fields marked as required before progressing to the next section.

Tip: SEAMS allows for dynamic reporting so certain fields will bring up more fields in the same section once filled in.

All fields marked with the **lock symbol** indicate that you are not able to modify the content of this field. These locked fields are often used to show you information or guidelines on your event.


|

[Close](#) Step 2 of 11 [Save](#)

Incident

Incident Notification Details

1) Person who reported the incident: *

2) Date and time reported: * 

Monday, 26 Apr 2021 11:17 AM

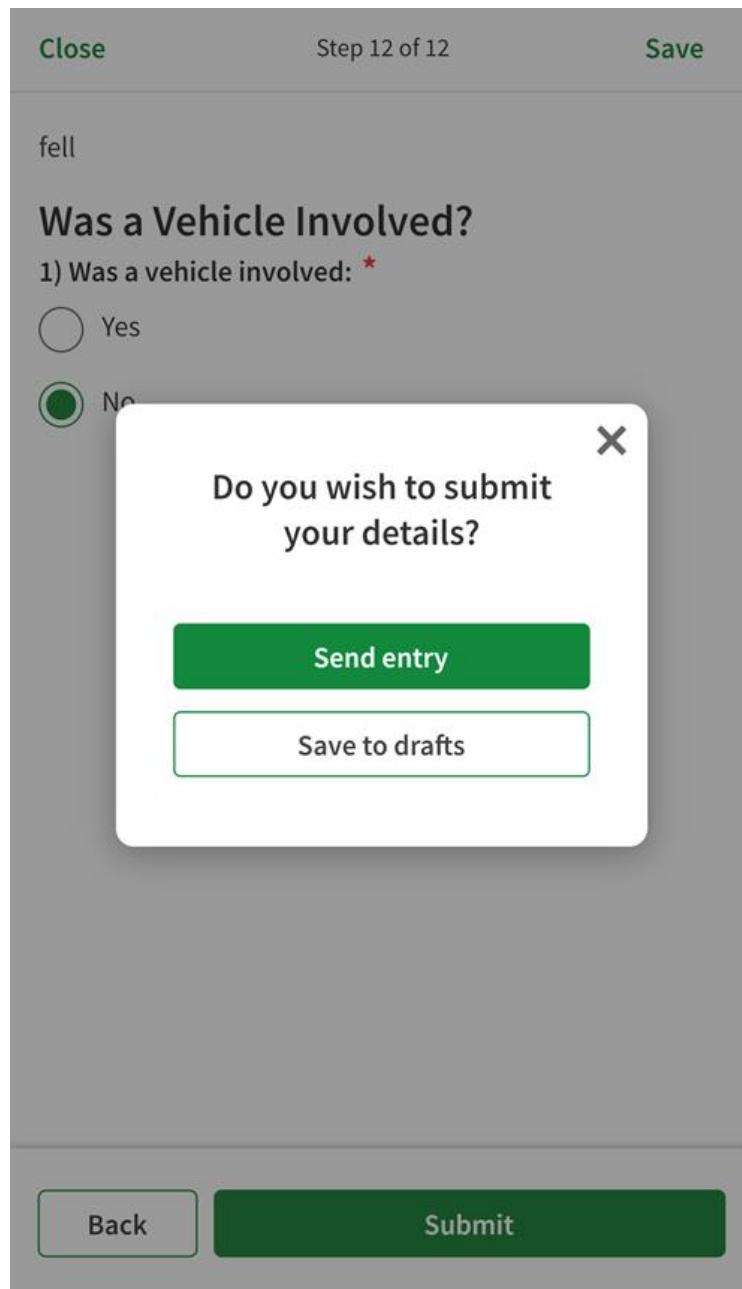
3) Date and time of the incident: *

No date chosen

[Add a custom date](#)

At any point in your report, you are able to tap the **Save** button at the top right of the screen to save your progress. You will then have the option to save it as a draft which you can return to at any time.

Once you have reached the end of your report, tap the **Submit** button then choose to **Send Entry** if completed or **Save to drafts** if unfinished.

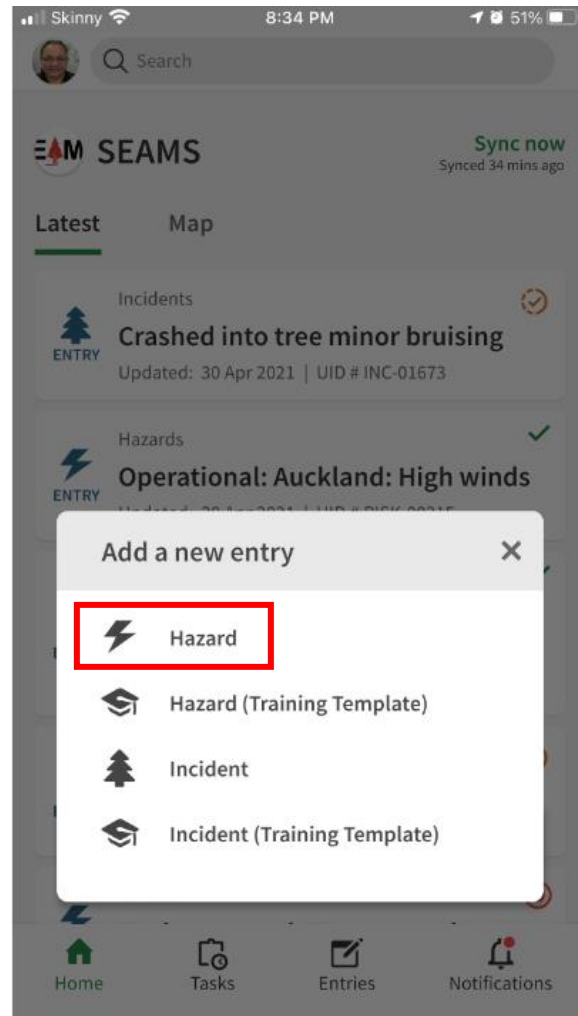
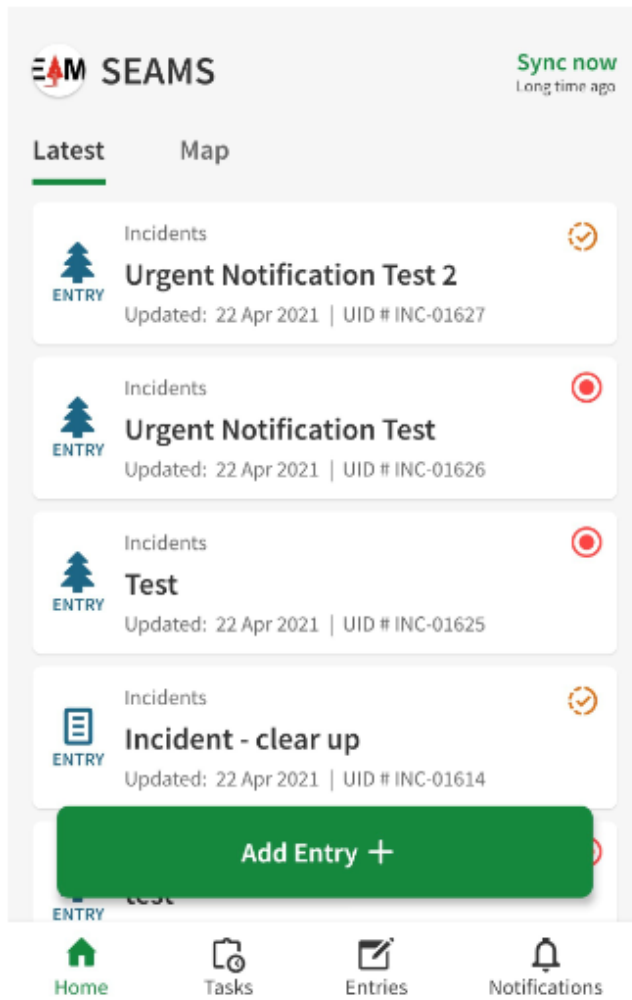


The screenshot shows a mobile application interface at "Step 12 of 12". At the top, there are "Close" and "Save" buttons. The main content area displays the text "fell" and the question "Was a Vehicle Involved?". Below this is a sub-question "1) Was a vehicle involved: *" with two radio button options: "Yes" (unselected) and "No" (selected). A white modal dialog box is centered on the screen, asking "Do you wish to submit your details?". It contains two buttons: a green "Send entry" button and a white "Save to drafts" button with a green border. At the bottom of the screen, there are "Back" and "Submit" buttons.

Report a Hazard

To report a hazard, tap the **Add Entry +** button on your dashboard.

Then tap **Hazard** under the **Add new entry** menu.



Follow the instructions on screen to fill in each field. Some fields will open up another screen for you to input information.

[Close](#)

Step 1 of 5

[Save](#)

Hazard

Fill in details

1) Hazard type: *

- Safety
- Environment

2) Was this hazard identified by a worker or safety rep? *

- Worker
- Safety Rep

3) Site: *

- Forest
- KPP Site
- Murupara Site
- Nursery
- Port / Weighbridges

[Next](#)

All fields marked with the **lock symbol** indicate that you are not able to modify the content of this field. These locked fields are often used to show you information or guidelines on your event ie by selecting Electricity in section 1), the description is displayed in selection 2) is for guidance only.

[Close](#)

Step 2 of 5

[Save](#)

Plant and equipment: bzhxh

Critical Risk Classification

1) Critical risk classification: *

- Electricity
- Fall Prevention
- Handheld Equipment
- Hazardous Substances
- Mobile Plant
- Road Safety
- Non Critical Risk

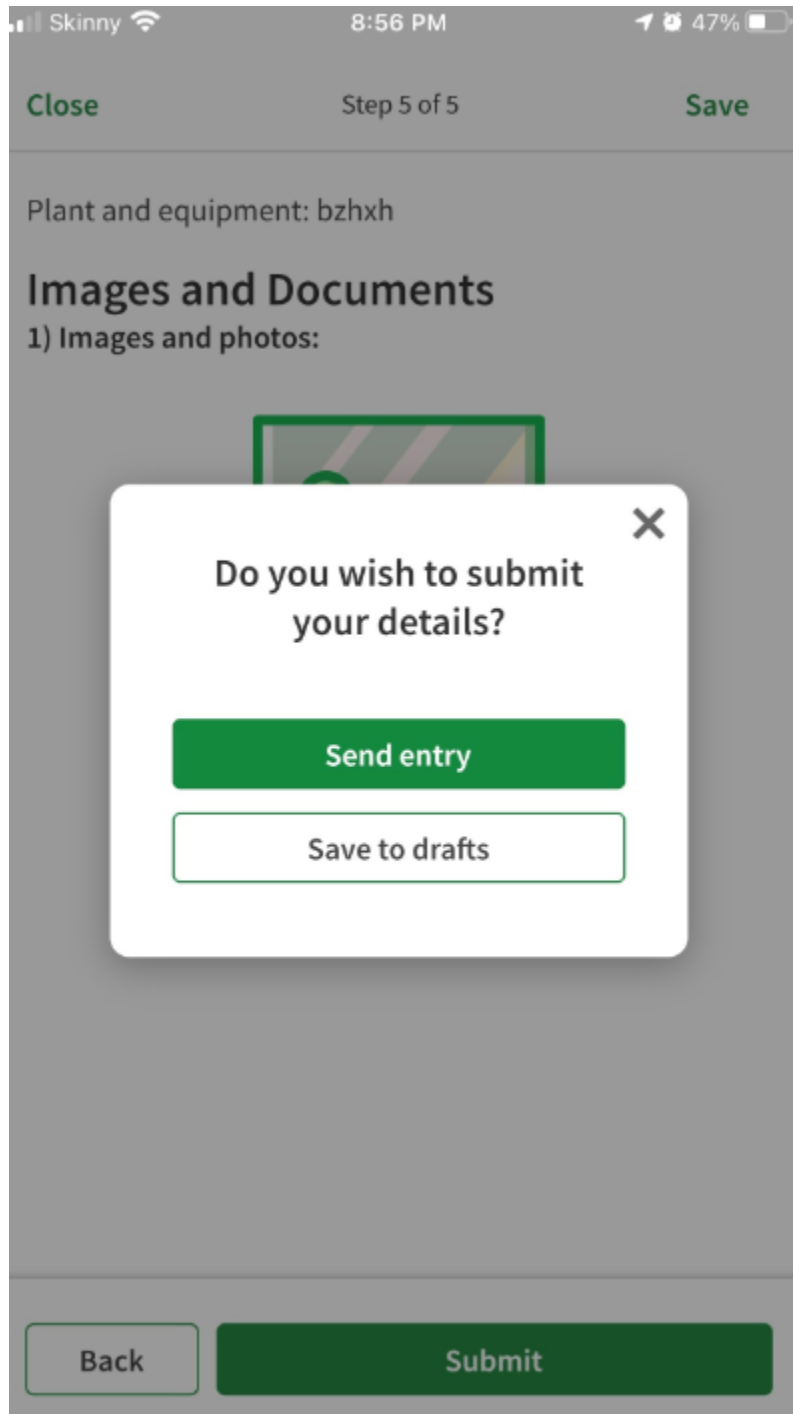
2) Critical risk classification description:



A workplace exposure involving electrical plant including all building and mechanized operations.

[Back](#)[Next](#)

Once you have reached the end of your report, tap the **Submit** button then choose to **Send Entry** if completed or **Save to drafts** if unfinished.



SEMS

**Safety, Environment
Assurance Management
System**

Notification of an Incident

Applicable to Desktop

Introduction

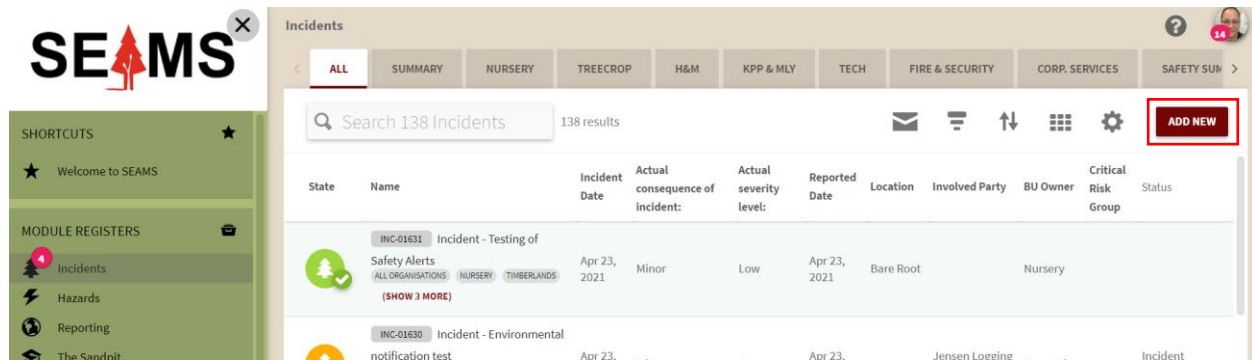
Overview

Throughout this section, you will learn how to:

- Create a new incident from the incidents template
- Follow the workflow and enter relevant data to your new incident entry

Getting Started

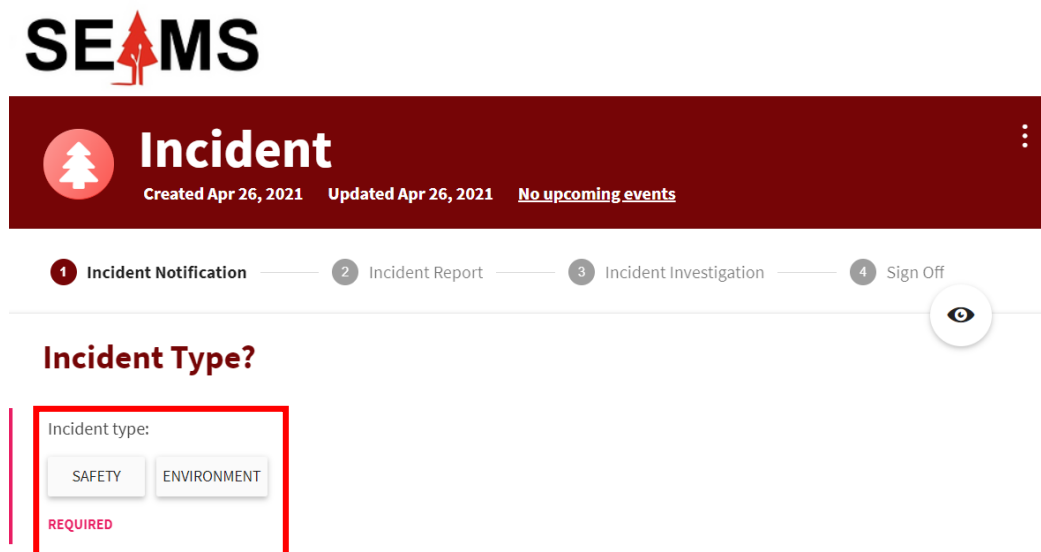
Navigate to the **Incidents** register. Click the **ADD NEW** button located at the top right of the dashboard.



State	Name	Incident Date	Actual consequence of incident:	Actual severity level:	Reported Date	Location	Involved Party	BU Owner	Critical Risk Group	Status
INC-01631	Incident - Testing of Safety Alerts	Apr 23, 2021	Minor	Low	Apr 23, 2021	Bare Root		Nursery		
INC-01630	Incident - Environmental notification test	Apr 23, ...			Apr 23,		Jensen Logging ..			Incident

Incident Type

The first section you will encounter is **Incident Type**. You will need to choose whether the incident you are reporting is safety or environmental related and select the corresponding option. If it is empty, it will be labelled **REQUIRED**. You must fill in all **REQUIRED** fields in order to complete and submit the entry.



Incident
Created Apr 26, 2021 Updated Apr 26, 2021 [No upcoming events](#)


1 Incident Notification — 2 Incident Report — 3 Incident Investigation — 4 Sign Off

Incident Type?

Incident type:


REQUIRED

Does Timberlands need to be immediately notified?

 Does Timberlands need to be immediately notified?

REQUIRED

The description below provides guidance if Timberlands should be immediately notified. If unsure, please select 'YES'

 Does Timberlands need to be immediately notified?

Timberlands requires immediate notification of an incident in the following situations:

1. An extreme, major or high risk near miss event
2. Any fatality
3. Any serious injury, this includes
 - a. In patient treatment at a hospital
 - b. Immediate amputation of any body part
 - c. Immediate treatment for a head injury, serious eye injury, a burn, any spinal injury, loss of body function, any separation of skin exposing underlying body parts, serious lacerations and/or medical treatment within 48 hours of exposure to a substance.
 - d. Immediate treatment for a serious eye injury
 - e. Immediate treatment for a burn
4. Any vehicle roll over
5. Any fall from height where an object hits a person, or the person has fallen and injured themselves
6. Any interaction between a person and moving equipment or vehicles

Incident Notification Details

Scroll down to the **Incident Notification Details** section. A number of fields in this section are required, so you must fill them out in order to **SAVE AND SUBMIT**.



Incident Notification Details


Person who reported the incident:

REQUIRED

Date and time reported:
Tue, 6th April 2021 (NZST), 08:00

Date and time of the incident:

 Select a date 

 00 : 00 **NOW** **CLEAR**

REQUIRED

The **Person who reported the incident** field to the left of this section is a text field. Type in the name of the person who reported the incident.

To the right of this section, there are two date fields: **Date and time reported**, and **Date and time of the incident**. These correspond to the date and time the event was reported, and that of the actual event. The **Date and time reported** field will automatically be filled into the date and time you created the report in SEAMS.

For the **Date and time of the incident** field, if the date and time you want to enter is your current date and time, simply click **NOW** to automatically fill it in.

Otherwise, click **Select a date** to select the specific day corresponding to your data. Then underneath that, where you can see **00 : 00**, type in the time you want in 24-hour time.

If you want to clear the data from this field at any point, simply click **CLEAR**.

Company Reporting

Next you will see the **Company Reporting** section. Here you'll be able to set the company you are a part of.

Company Reporting

Company reporting:

ALL ORGANISATIONS TIMBERLANDS TIMBERLANDS - OHS

SET COMPANY REPORTING

You may already have a company set for you but you can add more companies by clicking **SET COMPANY REPORTING**. A **Change Company reporting Tags** pop-up should appear.

Change Company reporting Tags ✕

ALL ORGANISATIONS ? SHOW ALL

- AK JACKSON
- AMON / R&L CONTRACTING
- AMON / R&L CONTRACTING - FIRE
- BALCO LOGGING LTD
- BIOVISION
- CMH
- CTL
- DISCOUNT EARTHMOVING
- DMG

ALL ORGANISATIONS TIMBERLANDS TIMBERLANDS - OHS

RESET DONE

Select the Company clicking on it. Note that some companies may have sub-companies for specificity. Click **+** to expand and **-** to collapse the list. Click **SHOW ALL** to see all companies. Please select at least one company.

Change Company Tags ✕

- ALL ORGANISATIONS
- BIOVISION

? SHOW ALL

ALL ORGANISATIONS BIOVISION

RESET DONE

Click **DONE** to confirm your selection or **RESET** to set to the default selection.


Where Did It Occur?


Scrolling down again, you come to a section called **Where Did It Occur?**

Where Did It Occur?

Location:

REQUIRED

 GPS location:




Under this section is another select field, **Location**. Select the location that the incident occurred out of the options available or select other if none of the locations apply. Different select fields will appear depending on your selection. In the example below, when KPP Site is selected you will also need to select which KPP site the incident occurred at.


Where Did It Occur?

Location:

KPP Site:

REQUIRED

 GPS location:



If you select other, a text field will appear, and you will need to give specific details of where the other location was.

Where Did It Occur?

Location:

FOREST

KPP SITE

MURUPARA SITE

NURSERY

PORT / WEIGHBRIDGES

SALA STREET

OTHER

Please give specific details where:

REQUIRED



GPS location:



You also have the option to select a specific location using the **GPS location** field. If you click on the text bar a pop up will appear titled **Pick a Location**. You can either type in an address manually by using the text bar at the top of the pop up or by clicking the pin which will ask for access to your device's location and use it accordingly.

Pick A Location

ADDRESS

221 Symonds

- 221 Symonds Street Eden Terrace, Auckland, New Zealand
- 221 Symonds Street Royal Oak, Auckland, New Zealand
- 221 Symonds Road Waipara, New Zealand
- 221 Symond Street Waihi, New Zealand
- 221 Symonds Road Tokanui, New Zealand

powered by Google

CLOSE

What Happened?

The next section you will encounter is the **What Happened** section.

What Happened?

? Brief description:

0 / 200

REQUIRED

Full description:

B I U [List icons] [Link icon] [Image icon]

Immediate action(s) carried out as a direct consequence of this incident:

B I U [List icons] [Link icon] [Image icon]

In the **Brief Description** field, you just need to write a short description about what happened during the incident. It is imperative you keep this description brief as it will be used for the title of the page.

? Brief description:

0 / 200

REQUIRED

After this you can give a more in-depth explanation of the incident in the **Full Description** rich text field and then list any actions undertaken as a result of the incident in the **Immediate action(s) carried out as a direct consequence of this incident**. Using the text formatting and linking tools on these fields, you can customise this text as well.

Full description:

B I U [List icons] [Link icon] [Image icon]

Immediate action(s) carried out as a direct consequence of this incident:

B I U [List icons] [Link icon] [Image icon]

Any Photos or Documents?

The next section, **Any Photos or Documents**, has two fields within it.

Any Photo or Documents?

? Add a photo or image:

ADD IMAGE **GALLERY LAYOUT**

Add any other documents or files:

UPLOAD NEW FILE

The first field: Photos/images, provides a place to attach one or more images relating to your event.

Clicking **ADD IMAGE** opens a file selection window. You can choose an image from your computer to upload.

Clicking **GALLERY LAYOUT** opens a **Gallery Layout Options** pop-up, where you can choose how you want your image(s) to be displayed and laid out on your entry.

The second field: Documents, allows you to attach any relevant documents to the entry.

Clicking **UPLOAD NEW FILE** opens up the **Upload new File(s)** pop-up that allows you to either upload a file from your computer or specify a URL to an online file. Once the upload finishes, click **NEXT** to the next step.

Upload new File(s) ✕

STEP 1 - SELECT/SPECIFY THE FILE(S)

You can upload files ... **... or you can specify a URL**

(hold ctrl key to select multiple files)

CHOOSE FILES

COMPLETED FILES

Contrasting 1.png
Created: 06 April 2021 09:07:26

Size
21.02 KB

Uploaded by
System created

NEXT

In step 2, you can optionally set tags and permissions for your uploaded files. Click **FINISH** to finish.

Upload new File(s) ✕

STEP 2 - PERMISSION YOUR FILE(S) (OPTIONAL)

By adding permissions to your files, those people with access to the files manager will be able to see and download your file. For files attached to a page, anyone who can see the page can download it from the page.

? **Set Direct Permissions**

+ PERSON

? **Choose Tags**

ALL ORGANISATIONS BIOVISION EDIT

BACK FINISH

Operational Business Unit and Activity

Next you will need to select the operation business unit in the **What was the Operational Business Unit?** location field. This works the same as the **Company** field in the **Company Reporting** section. Click **SELECT OPERATIONAL BUSINESS UNIT** and choose the relevant locations.

Operational Business Unit and Activity

What was the Operational Business Unit?

SET OPERATIONAL BUSINESS UNIT

REQUIRED

✕
Change Operational Business Unit Tags

- ADMIN / EXC
- DISTRIBUTION
- FINANCE
- FIRE / SECURITY
- HARVESTING
- KPP / MLD
- LOG YARD / KPP & MURUPARA
- NURSERY
- OHS
- PORT

CLEAR
DONE

Once the operational business unit is selected a new select field will appear based on your business unit choice. This field asks you **What operation activity were you engaged in at the time?** and you'll just need to select the activity that was happening when the incident occurred.

Operational Business Unit and Activity

What was the Operational Business Unit?

FIRE / SECURITY

SET OPERATIONAL BUSINESS UNIT

What operation activity were you engaged in at the time?

AERIAL FIRE SURVEILLANCE / OPERATIONS

FIRE FIGHTING

INCIDENT MANAGEMENT

LANDBASED

MAINTENANCE

OFFICE ADMINISTRATION

ROAD SAFETY

SECURITY

STANDBY

TL SUPERVISOR / FIELD WORK

TRAINING

TRAVELLING

OTHER

Who Was Involved?

In this section you'll need to select the type of people that were involved in the incident in the **Nature of people involved** field. You can select multiple options here so select all that apply.

Who Was Involved?

People Involved

Nature of people involved:

TL EMPLOYEE CONTRACTOR EMPLOYEE THIRD PARTY

SUBCONTRACTOR OTHER

REQUIRED

After this you'll also need to specify the number of people involved in the **Number of people involved** field. This is a number field, so you just need to type the number of people in the text bar.

 Number of people involved:

2

Once you've entered this number additional fields will appear that ask you to specify who was involved and their contact details. The number of fields appearing will depend on the number you entered. For example, if you said there were two people involved in the incident, two **Who was involved?** and two **Contact Details** fields will appear. You'll need to fill in the name and contact details of each person involved in the incident.



Number of people involved:

2

1. Who was involved?

REQUIRED

Contact details:

REQUIRED

2. Who else was involved?

REQUIRED

Contact details:

REQUIRED

Company Involved

This section only contains one select field. You'll need to select the company involved in the incident in the **Company Involved** dropdown.

Company Involved

Company involved:

- 

REQUIRED



Company Involved

Company involved:

- ✓ -
- Ak Jackson
- Amon
- Balco Logging Ltd
- Biovision
- CMH
- CTL
- Discount Earthmoving
- DNG
- Doing Good

Eyewitnesses

In the **Eyewitness** section you'll need to select whether there were any eyewitnesses present.

Eyewitnesses

Eyewitnesses present:

REQUIRED

If you select YES, a text field will appear where you will need to enter the contact details of the eyewitnesses present for the incident.

Eyewitnesses

Eyewitnesses present:

 YES N/A

Please give witness details:

B *I* U    

Was a Vehicle Involved?

In the final section you'll need to select whether a vehicle was involved in the incident under the **Was a vehicle involved** field.

Was a Vehicle Involved?

Was a vehicle involved:

 YES NO

REQUIRED

If you select YES, more fields will appear regarding information about the vehicle. You'll need to select the **Vehicle Type** and **Has the vehicle rolled in any way?** If you select LIGHT VEHICLE as the vehicle type you will also need to select the type of light vehicle in a select field and registration number in the text input field.

Finally, you can add any other information on the vehicle in a text input field named **Other information on the vehicle(s)**.

Was a Vehicle Involved?

Was a vehicle involved:

 YES NO

Vehicle type:

 LIGHT VEHICLE TRUCK MOBILE PLANT RAIL OTHER

REQUIRED



Has the vehicle rolled in any way?

 YES NO

REQUIRED

Other information on the vehicle(s):

Was a Vehicle Involved?

Was a vehicle involved:

YES NO

Vehicle type:

LIGHT VEHICLE TRUCK MOBILE PLANT RAIL OTHER

Light vehicle type:

CAR OR UTE VAN QUAD TRUCK



Has the vehicle rolled in any way?

YES NO

REQUIRED




Registration number/s:




Other information on the vehicle(s):

Save & Submit

Once you have filled out all the required fields, the **SAVE & SUBMIT** button will become clickable. (If it is not, go back and check that you do not have any red required fields yet to complete).

Clicking this button will notify the relevant parties within your company to read what you have logged and act accordingly.

 **ASSIGN TO**  **SAVE PROGRESS**  **SAVE & SUBMIT**

 **ASSIGN TO**  **SAVE PROGRESS**  **SAVE & SUBMIT**

Assign people to fill in this step✕

PEOPLE CURRENTLY ABLE TO PERFORM THIS TASK

SELECTED USERS

IT Isabelle Test ✕

CHOOSE NEW USERS

DONE

You can also use the **ASSIGN TO** button if you would like somebody else to help you finish the entry. They will receive an email notifying them to complete the entry. This might be helpful if somebody else witnessed the event and they want to add their own thoughts to the entry.

Alternatively, if you do not wish to notify other people of your event just yet, or cannot yet complete all the required fields, click **SAVE PROGRESS** to save what you have written so far. If you do this, please remember to come back later and fully complete and submit the entry.

SEMS

**Safety, Environment
Assurance Management
System**

Reporting a Hazard

Applicable to Desktop

Introduction

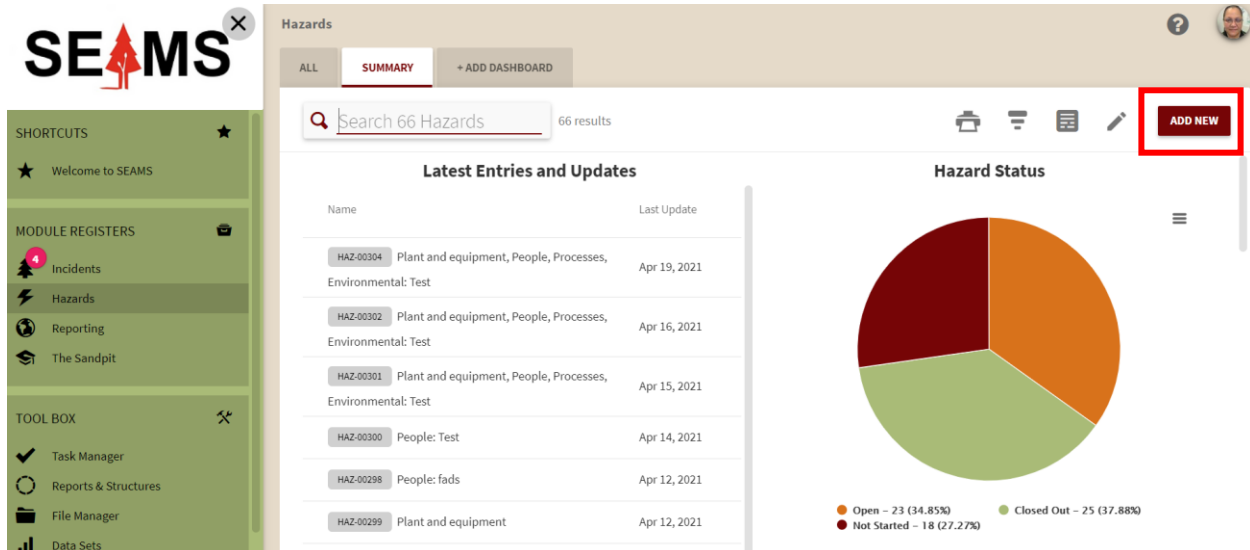
Overview

In this guide, you will learn how to log a Hazard entry in the SEAMS.

Making a New Hazard Entry

Getting Started

To begin, navigate to the **Hazards** register in the left sidebar. Once there, click the **ADD NEW** button in the top-right corner to create a new Hazard entry. (If your screen is particularly small, this may appear as a green + circle button in the lower-right instead.)



Initial Information

The first thing you will need to do is determine whether the hazard was identified by a worker or a safety rep by selecting the corresponding option under the **Was this hazard identified by a worker or safety rep?** field.

Was this hazard identified by a worker or safety rep?

REQUIRED

Next you'll see another select field titled **Site**. Select the site that the hazard was identified at out of the options available or select other if none of the locations apply. Different select fields will appear

depending on your selection. In the example below, when KPP Site is selected you will also need to select which KPP site the incident occurred at.

Site:

KPP Site:


REQUIRED






If you select other, a text field will appear and you will need to give specific details of where the other location was.

You also have the option to select a specific location using the **GPS location** field. If you click on the text bar a pop up will appear titled **Pick a Location**. You can either type in an address manually by using the text bar at the top of the pop up or by clicking the pin which will ask for access to your device's location and use it accordingly.

Pick A Location

ADDRESS

221 Symonds 

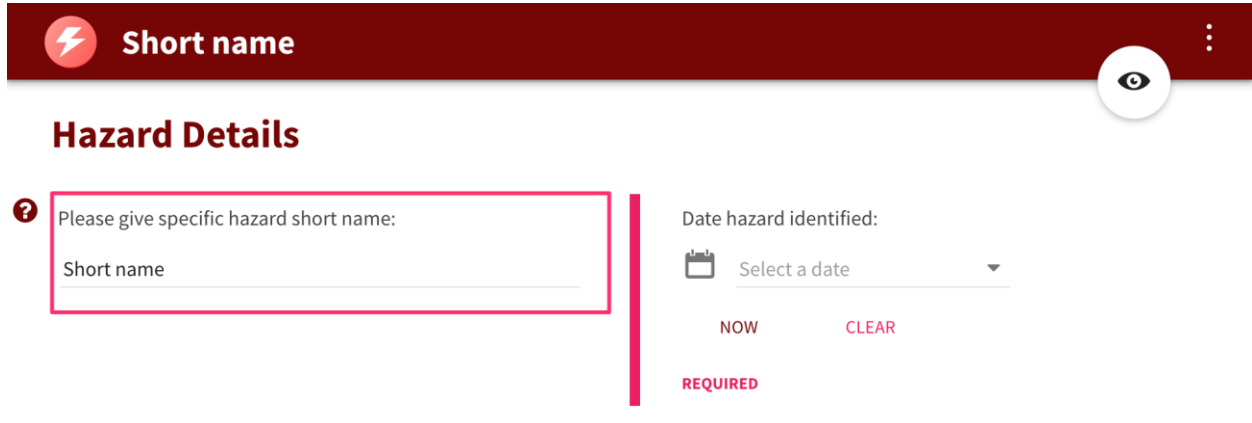
-  **221 Symonds Street** Eden Terrace, Auckland, New Zealand
-  **221 Symonds Street** Royal Oak, Auckland, New Zealand
-  **221 Symonds Road** Waipara, New Zealand
-  **221 Symond Street** Waihi, New Zealand
-  **221 Symonds Road** Tokanui, New Zealand

powered by Google

CLOSE

Hazard Classification

Scroll down and you will see the hazard classification section. You'll see a text input field called **Please give specific hazard short name** where you'll need to write a short title for the hazard in the provided text input area. It is imperative that you keep this short as it will be used for the title of the entry.



Short name

Hazard Details

? Please give specific hazard short name:

Short name

Date hazard identified:

Select a date

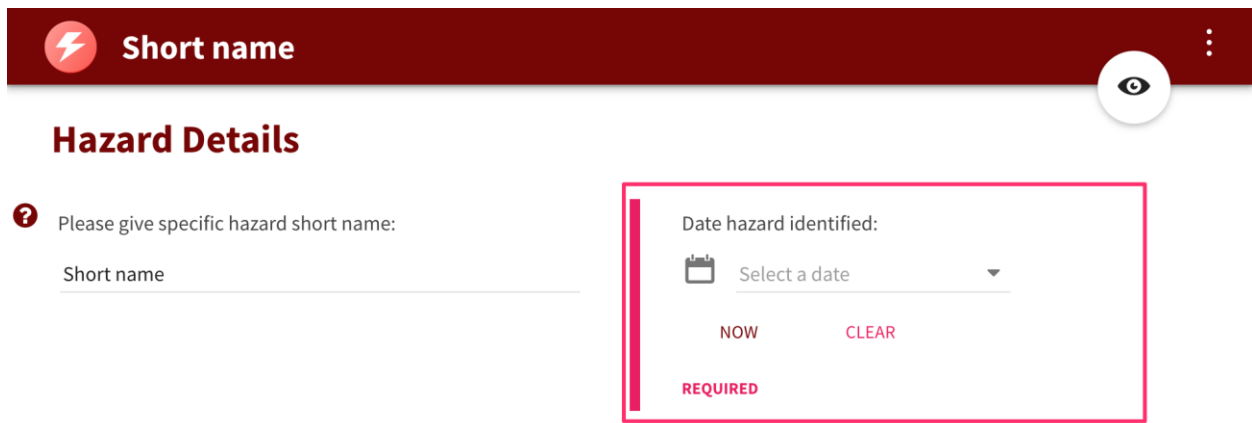
NOW CLEAR

REQUIRED

To the right of this field you will see a date field titled **Date hazard identified**. For this field, if the date you want to enter is your current date, simply click **NOW** to automatically fill it in.

Otherwise, click **Select a date** to select the specific day corresponding to your data.

If you want to clear the data from this field at any point, simply click **CLEAR**.



Short name

Hazard Details

? Please give specific hazard short name:

Short name

Date hazard identified:

Select a date

NOW CLEAR

REQUIRED

After this you'll see two more select fields. The first, **Hazard categories**, is where you'll need to select the category that is most in line with the hazard you have identified. The second, **Which operation business units does this affect?**, is where you'll need to identify the business unit that the hazard affects.

? Hazard categories:

PLANT AND EQUIPMENT PEOPLE PROCESSES ENVIRONMENTAL

REQUIRED

Which operation business units does this affect?

ALL CLEAR HARVESTING DISTRIBUTION PORT ROADING & ENGINEERING KPP / MLD

LOG YARD (KPP & MURUPARA) TREECROP TECHNICAL NURSERY FIRE / SECURITY FINANCE OHS

ADMIN/EXC

After selecting the business unit, you can also fill in the text input below asking for a short description specifying which activity the hazard relates to within that business unit.

Which operation business units does this affect?

ALL CLEAR HARVESTING DISTRIBUTION PORT ROADING & ENGINEERING KPP / MLD

LOG YARD (KPP & MURUPARA) TREECROP TECHNICAL NURSERY FIRE / SECURITY FINANCE OHS

ADMIN/EXC

Please, specify activity:

Finally, you'll have three rich text fields to fill in. The first is labelled **Hazard description** and this is where you can give a more detailed report of the hazard identified. The second is labelled **What could happen** and this is where you can describe the consequences of the hazard you identified i.e., what could happen if that hazard occurred. The last field is **Immediate corrective actions**, and this gives you the opportunity to explain what immediate actions you took to prevent the hazard. Using the text formatting and linking tools on these fields, you can customise this text as well.



Hazard description:

B *I* U [List] [List] [Link] [Image]

REQUIRED

What could happen:

B *I* U [List] [List] [Link] [Image]

REQUIRED

Immediate corrective actions:

B *I* U [List] [List] [Link] [Image]

REQUIRED

Images and Documents

The next section, **Images and Documents**, has two fields within it.

Images and Documents

Images and photos:

ADD IMAGE GALLERY LAYOUT

Documents and files:

UPLOAD NEW FILE

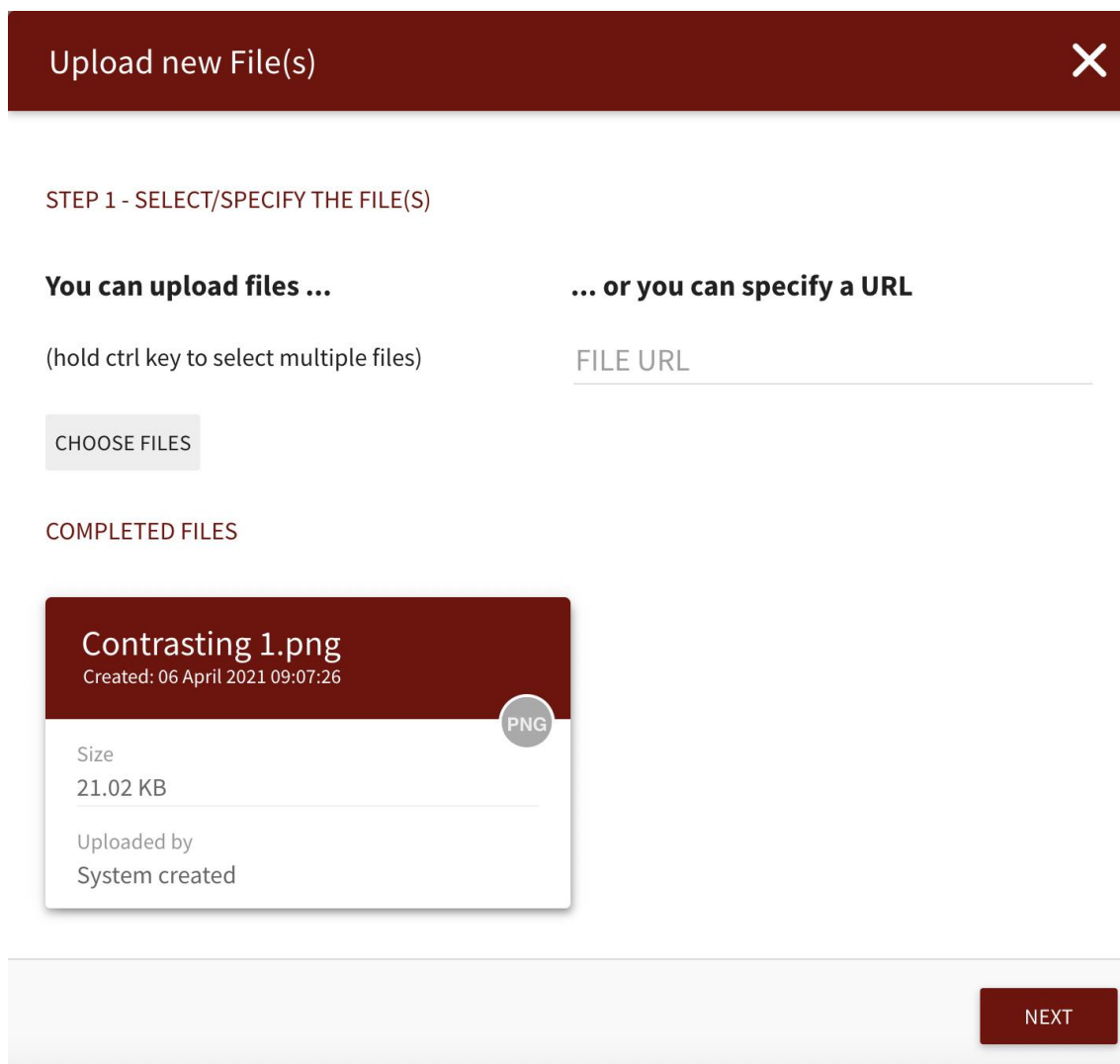
The first field, **Images and photos** provides a place to attach one or more images relating to your event.

Clicking **ADD IMAGE** opens a file selection window. You can choose an image from your computer to upload.

Clicking **GALLERY LAYOUT** opens a **Gallery Layout Options** pop-up, where you can choose how you want your image(s) to be displayed and laid out on your entry.

The second field, **Documents and files**, allows you to attach any relevant documents to the entry.

Clicking **UPLOAD NEW FILE** opens up the **Upload new File(s)** pop-up that allows you to either upload a file from your computer or specify a URL to an online file. Once the upload finishes, click **NEXT** to the next step.



Upload new File(s) ✕

STEP 1 - SELECT/SPECIFY THE FILE(S)

You can upload files ... **... or you can specify a URL**

(hold ctrl key to select multiple files) FILE URL

CHOOSE FILES

COMPLETED FILES

Contrasting 1.png
Created: 06 April 2021 09:07:26

Size
21.02 KB

Uploaded by
System created

PNG

NEXT

In step 2, you can optionally set tags and permissions for your uploaded files. Click **FINISH** to finish.

Upload new File(s)



STEP 2 - PERMISSION YOUR FILE(S) (OPTIONAL)

By adding permissions to your files, those people with access to the files manager will be able to see and download your file. For files attached to a page, anyone who can see the page can download it from the page.

Set Direct Permissions

+ PERSON

Choose Tags

ALL ORGANISATIONS

BIOVISION

EDIT

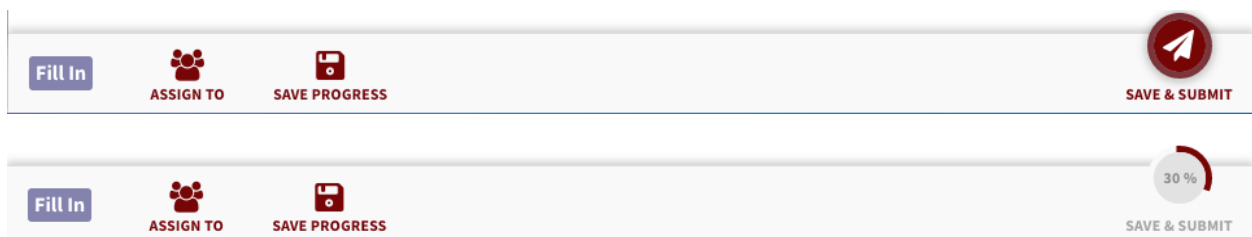
BACK

FINISH

Save & Submit

Once you have filled out all the required fields, the **SAVE & SUBMIT** button will become clickable. (If it is not, go back and check that you do not have any red required fields yet to complete).

Clicking this button will notify the relevant parties within your company to read what you have logged and act accordingly.



The image shows two horizontal bars representing the 'Save & Submit' button state. Each bar contains four icons: 'Fill in' (blue), 'ASSIGN TO' (red), 'SAVE PROGRESS' (red), and 'SAVE & SUBMIT' (red). In the top bar, the 'SAVE & SUBMIT' button is disabled, indicated by a red arrow icon. In the bottom bar, the 'SAVE & SUBMIT' button is enabled, indicated by a red arrow icon and a 30% progress indicator.

Assign people to fill in this step✕

PEOPLE CURRENTLY ABLE TO PERFORM THIS TASK

SELECTED USERS

IT Isabelle Test ✕

CHOOSE NEW USERS

🔍 Find users

DONE

You can also use the **ASSIGN TO** button if you would like somebody else to help you finish the entry. They will receive an email notifying them to complete the entry. This might be helpful if somebody else witnessed the event and they want to add their own thoughts to the entry.

Alternatively, if you do not wish to notify other people of your event just yet, or cannot yet complete all the required fields, click **SAVE PROGRESS** to save what you have written so far. If you do this, please remember to come back later and fully complete and submit the entry.

SEMS

**Safety, Environment
Assurance Management
System**

Task Manager

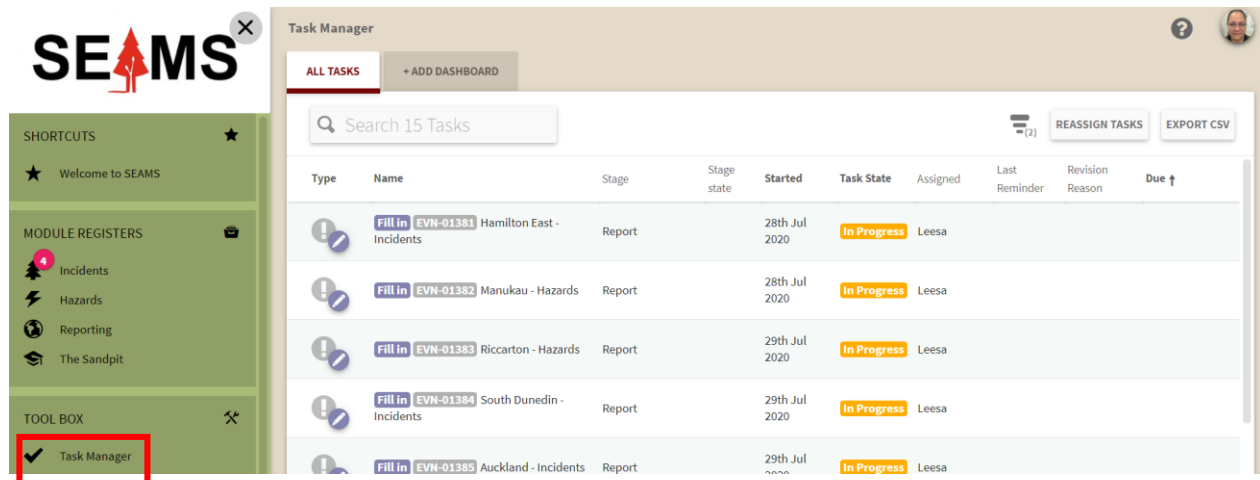
Applicable to Mobile & Desktop

Introduction

Overview

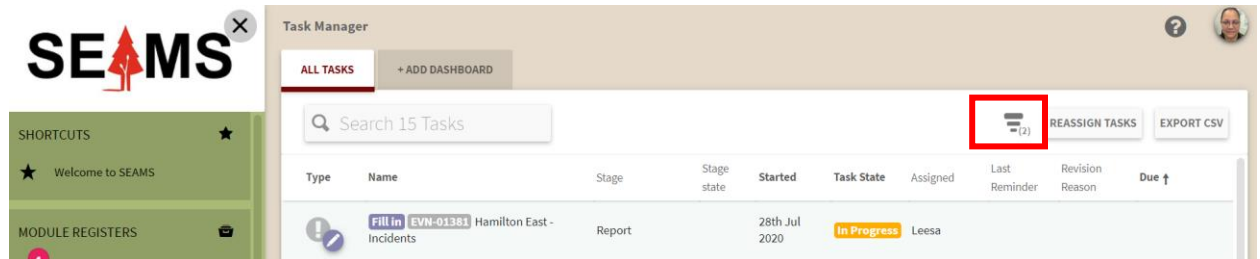
This guide will teach you how to use the **Task Manager** tool to help find entries based on what filter you require. For example, finding incomplete entries from the Risk register.

First, we need to navigate to the **Task Manager** tool, which can be located under the **Tool box** section of the left hand side of the menu. See figure below.

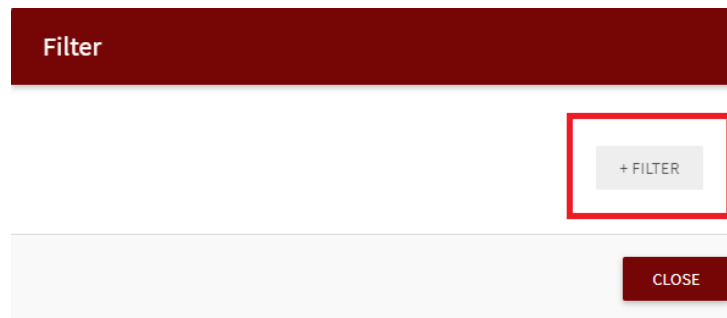


How To Filter By Registers

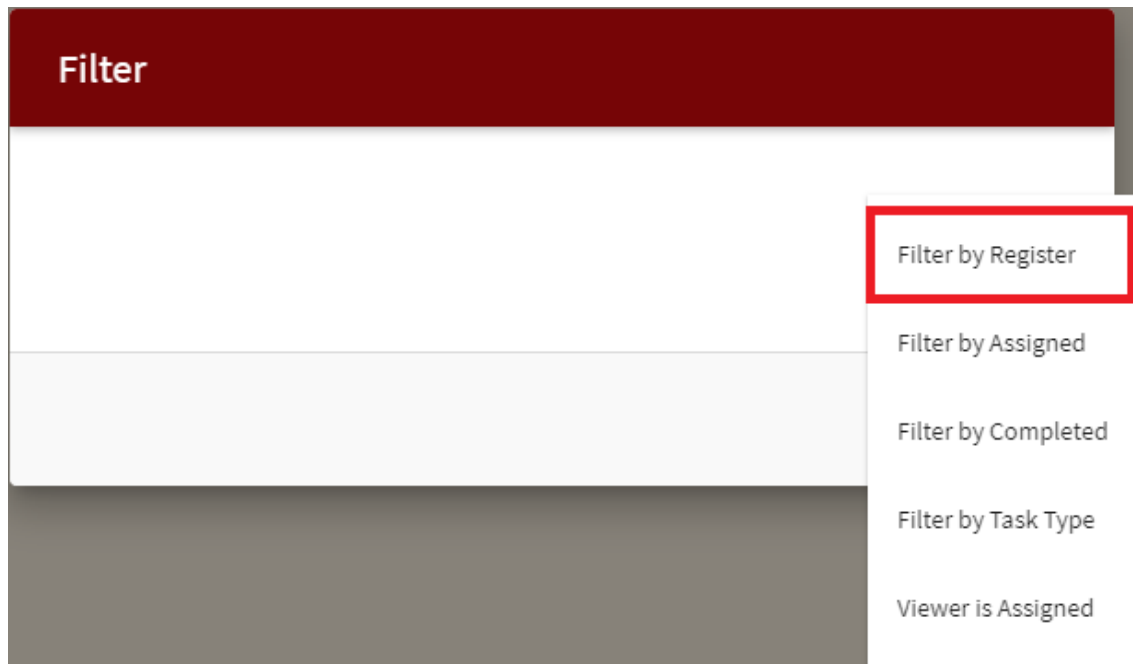
1. Click on the **Task Manager** section, click on the **filter** button, see picture below.



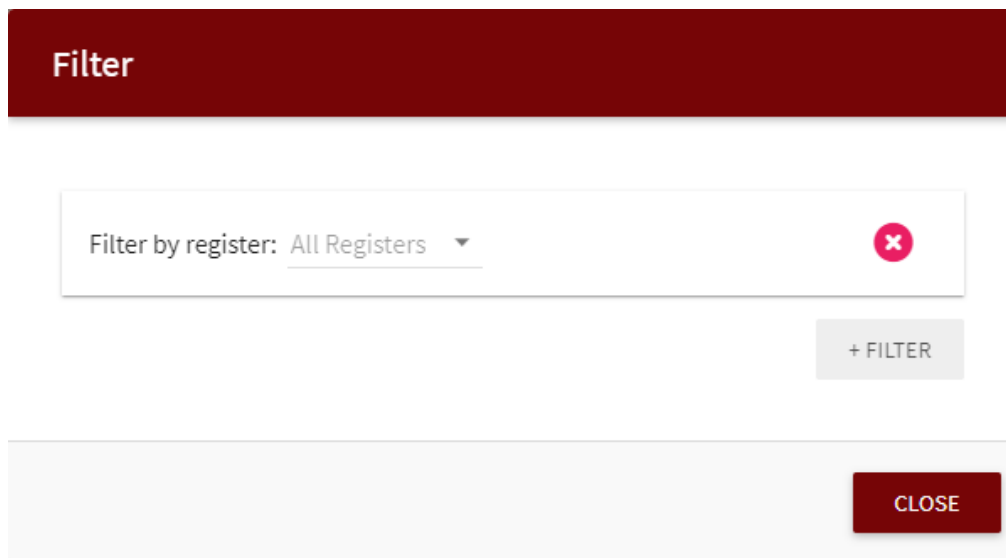
2. You should see a pop-up screen called **filter**. Click on the **+ FILTER** button. See picture below



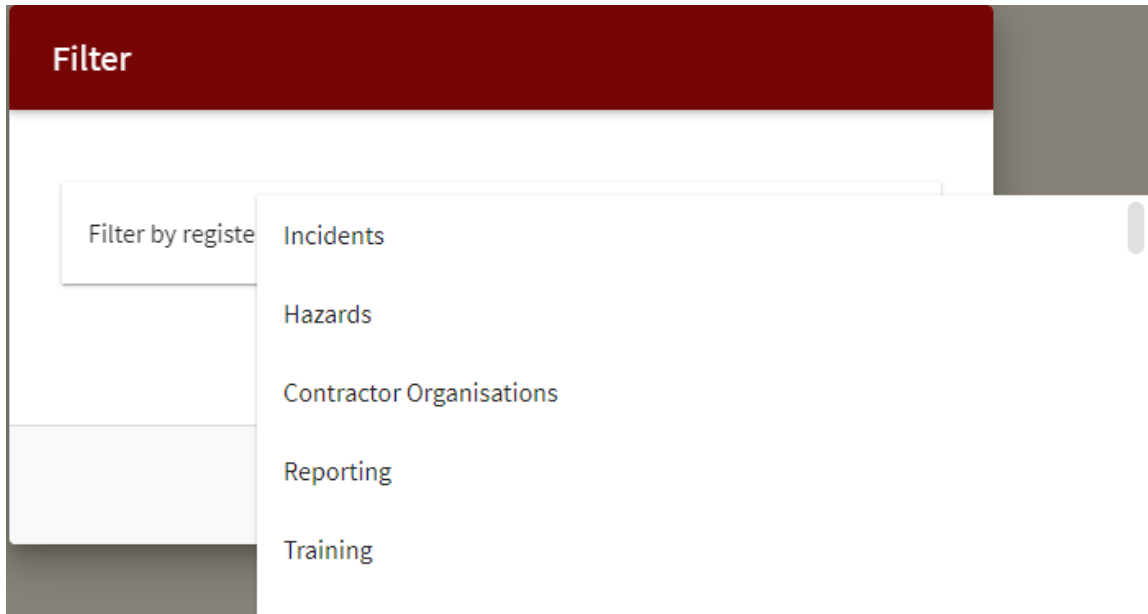
3. You should see a list of items you can filter by. Click on the **Filter by Register** button.



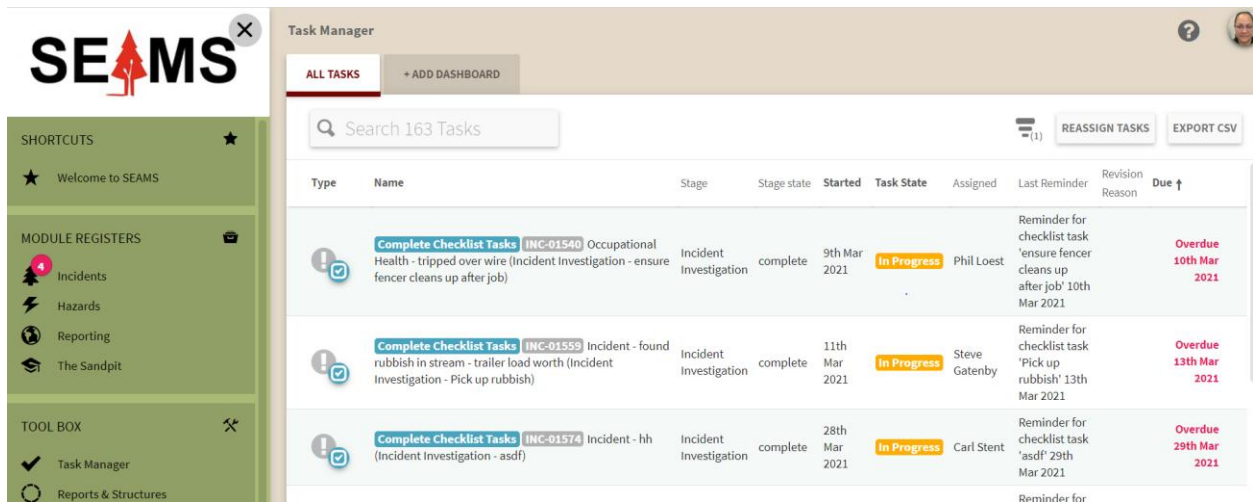
- Initially the filter is set to show **All registers**, if this is what you wanted, you can click the **CLOSE** button, and the main screen will show you all the entries of all registers, as seen in the pictures below.



- If you would like to filter a specific register, click on the dropdown menu, and select the register you wish to filter. Then click the **CLOSE** button, which will show you the main screen, and you should see the filtered entries from your chosen register



You should now be able to see your filtered entries based on your selected register. In our example, we have selected the Incidents register, and the picture below shows us all the entries that relate to the Action register.



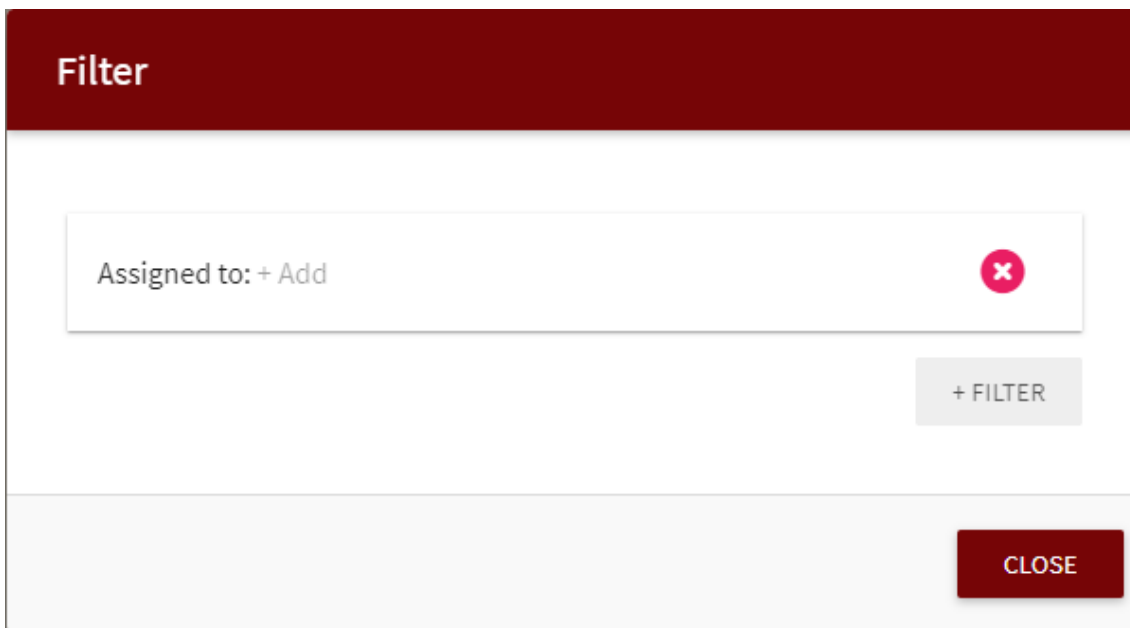
Type	Name	Stage	Stage state	Started	Task State	Assigned	Last Reminder	Revision Reason	Due ↑
Complete Checklist Tasks	INC-01540 Occupational Health - tripped over wire (Incident Investigation - ensure fencer cleans up after job)	Incident Investigation	complete	9th Mar 2021	In Progress	Phil Loest	Reminder for checklist task 'ensure fencer cleans up after job' 10th Mar 2021		Overdue 10th Mar 2021
Complete Checklist Tasks	INC-01559 Incident - found rubbish in stream - trailer load worth (Incident Investigation - Pick up rubbish)	Incident Investigation	complete	11th Mar 2021	In Progress	Steve Gatenby	Reminder for checklist task 'Pick up rubbish' 13th Mar 2021		Overdue 13th Mar 2021
Complete Checklist Tasks	INC-01574 Incident - hh (Incident Investigation - asdf)	Incident Investigation	complete	28th Mar 2021	In Progress	Carl Stent	Reminder for checklist task 'asdf' 29th Mar 2021		Overdue 29th Mar 2021

How To Filter Who Is Assigned

- Go to the filter screen (go to step 3 of “How to filter by registers”). Select **Filter by Assigned**.



2. You should now be able to type in a person you wish to filter.



3. Similar results should show up as you are typing, select the person you are looking for. You can also add more than 1 person to filter. Once you click the **CLOSE** button, the main screen will show a list of entries with the chosen filter.

Filter


Assigned to: tes 

Isabelle Test

+ FILTER

CLOSE

Filter

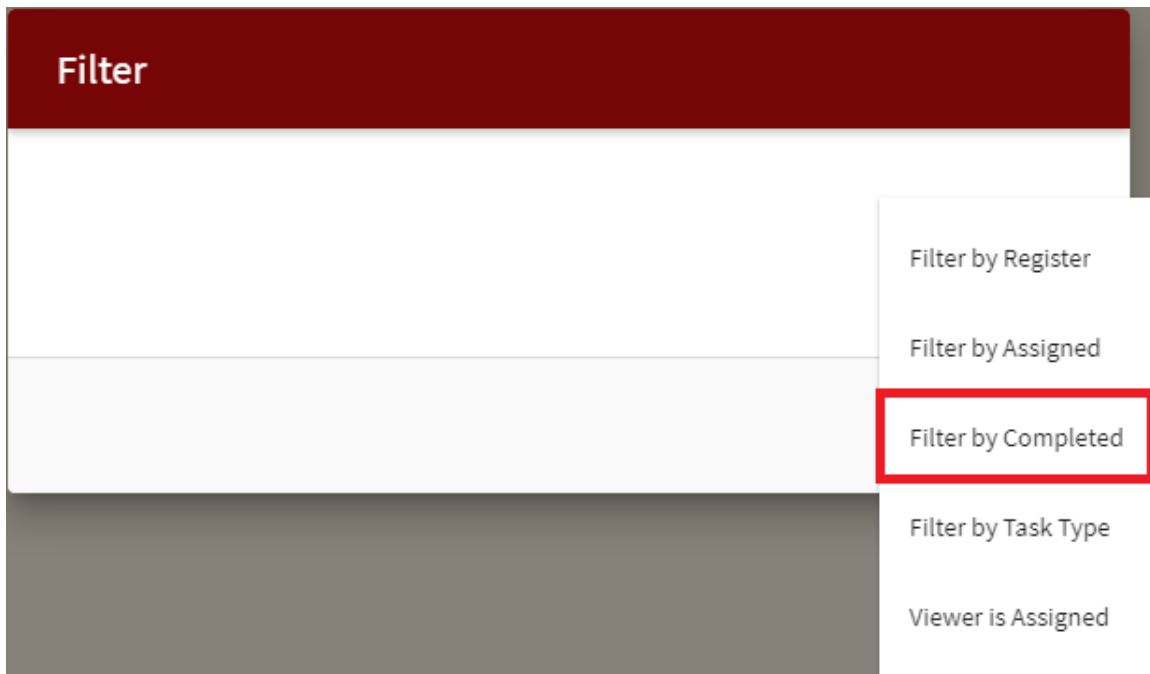
Assigned to: Isabelle Test  + Add

+ FILTER

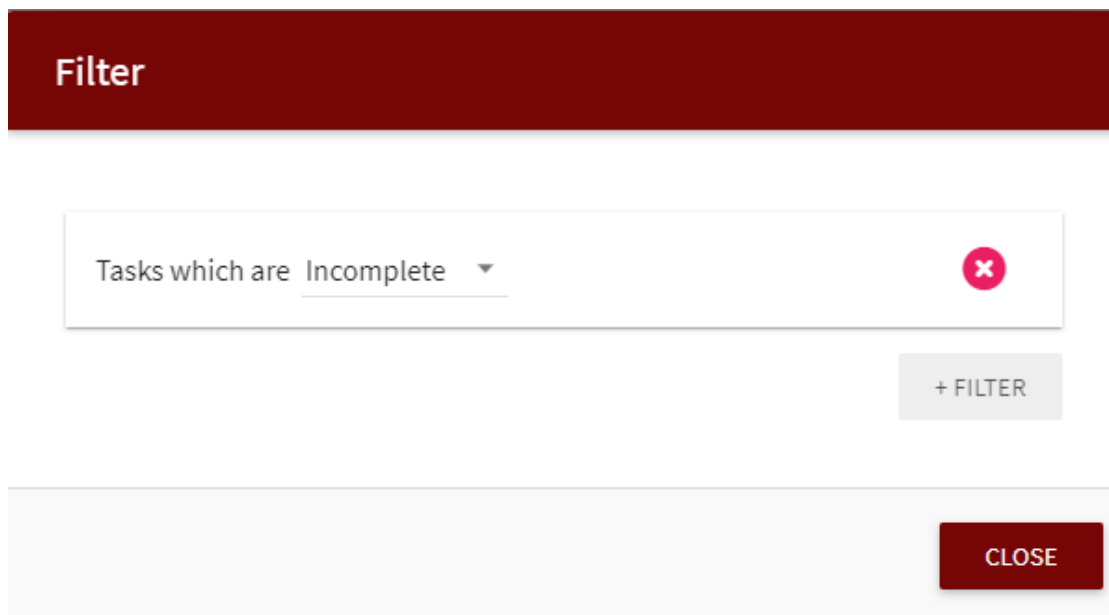
CLOSE

How To Filter By Completed Tasks

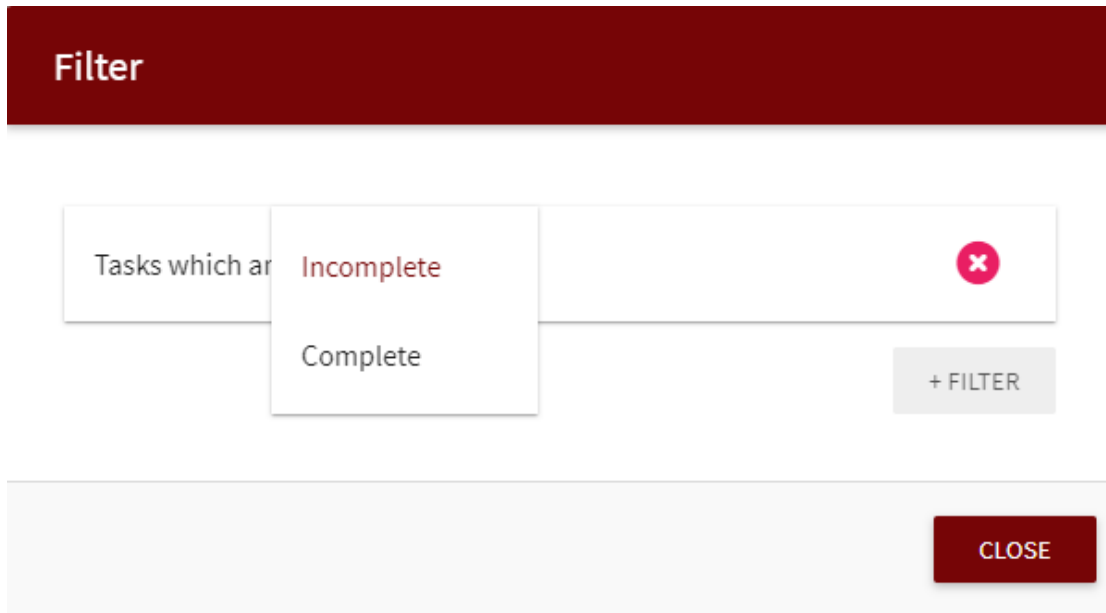
1. Go to the filter screen (go to step 3 of “How to filter by registers”). Select **Filter by Completed**.



2. Click on the drop down select field

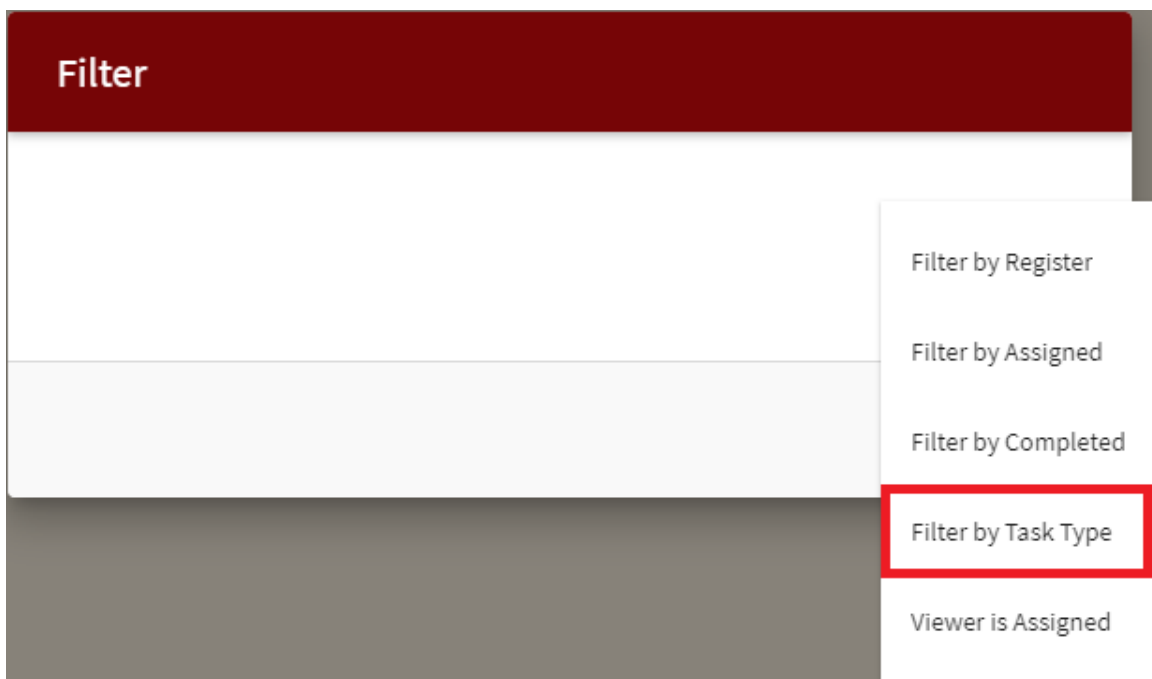


3. There are a couple of options to select from, you can filter entries which are **Incomplete**, or **Completed**.
Then click the **CLOSE** button, the main screen will show a list of entries with the chosen filter.

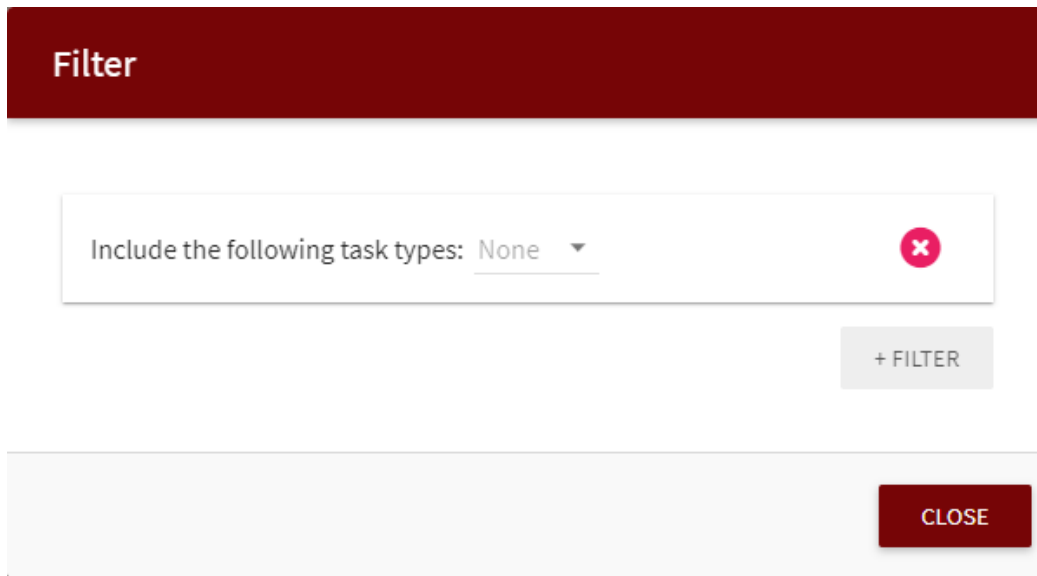


How To Filter By Task Type

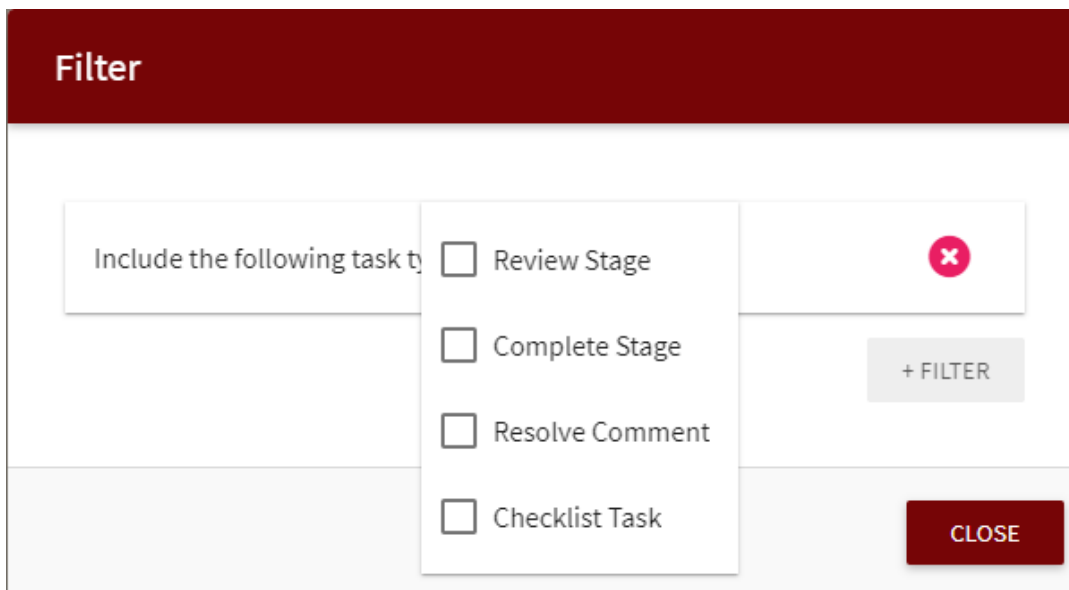
1. Go to the filter screen (go to step 3 of "How to filter by registers"). Select **Filter by Task Type**.



2. Click on the drop-down arrow.

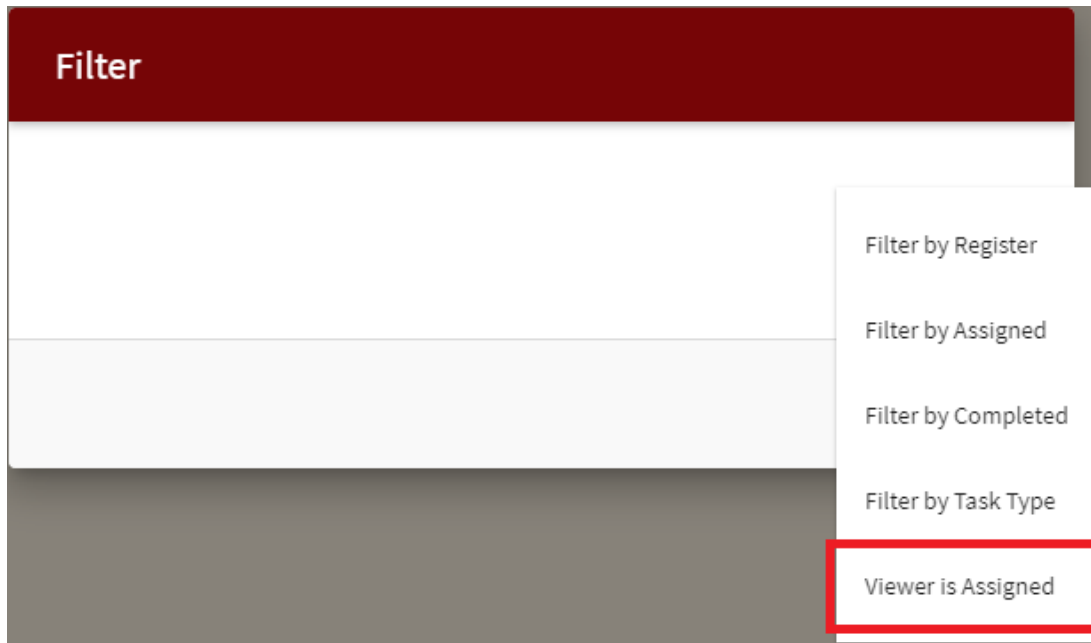


3. There should be a few options for you to select from. Select the option(s) you wish to filter. Then click the **CLOSE** button, the main screen will show a list of entries with the chosen filter.

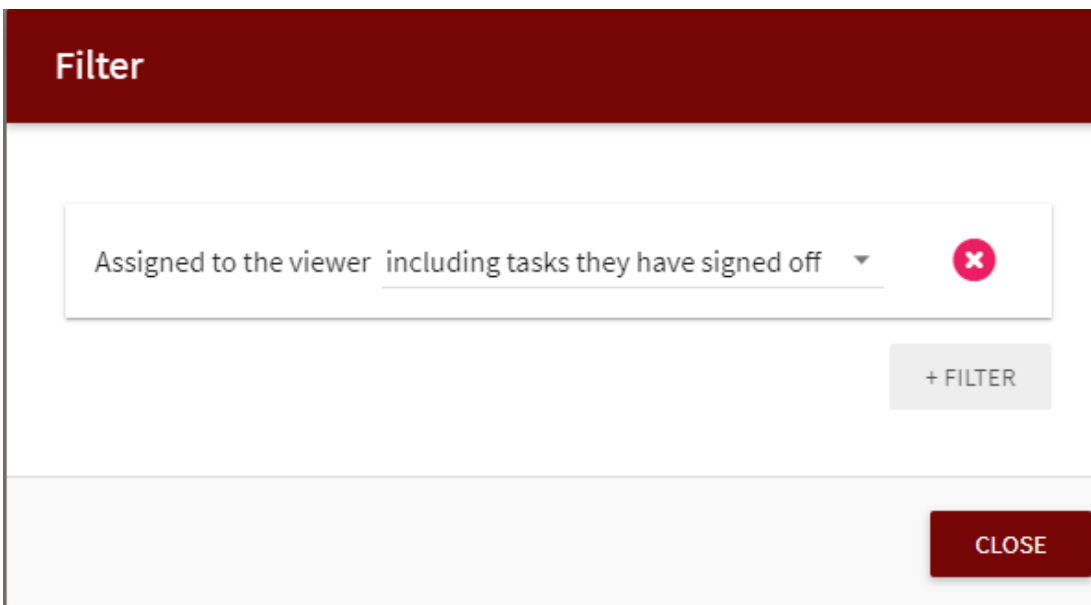


How To Filter By My Own Tasks

1. Go to the filter screen (go to step 3 of “How to filter by registers”). Select **Viewer is Assigned**.



2. Click on the drop down arrow



3. There are a couple of options/filters you can select from, select the one you wish to use. Then click the **CLOSE** button, the main screen will show a list of forms with the chosen filter.

Filter

Assigned to the viewer

including tasks they have signed off



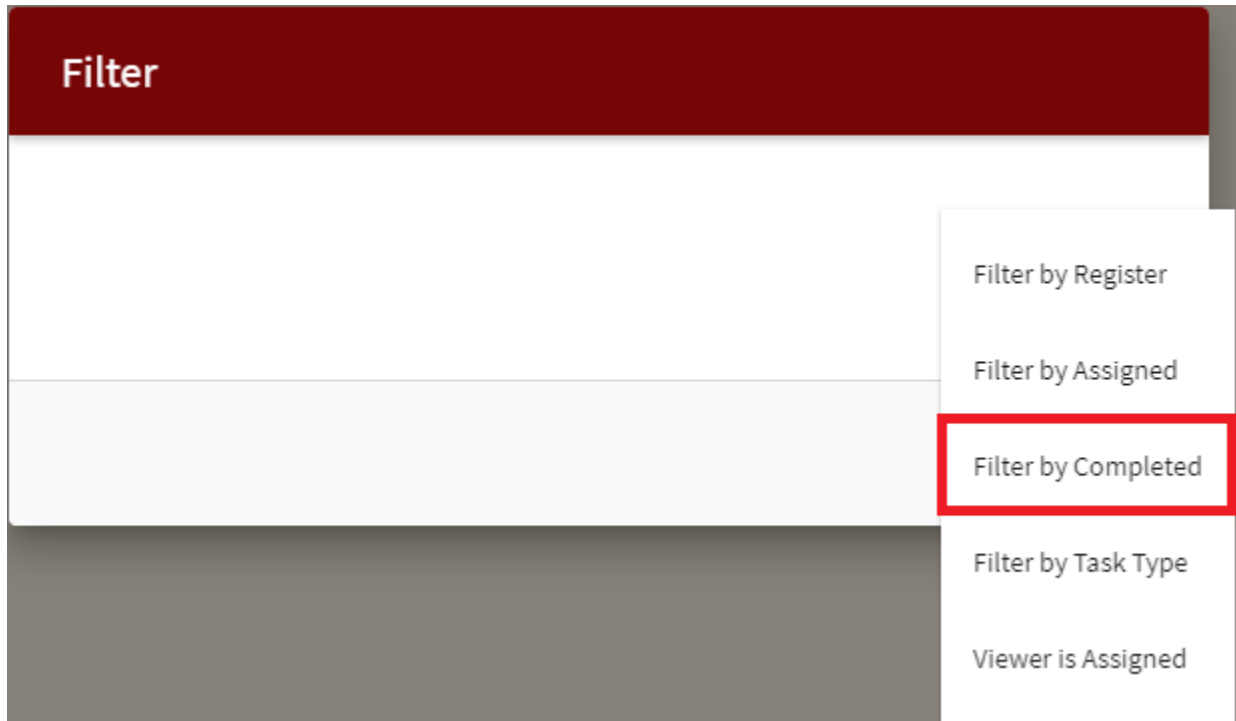
excluding tasks they have signed off

+ FILTER

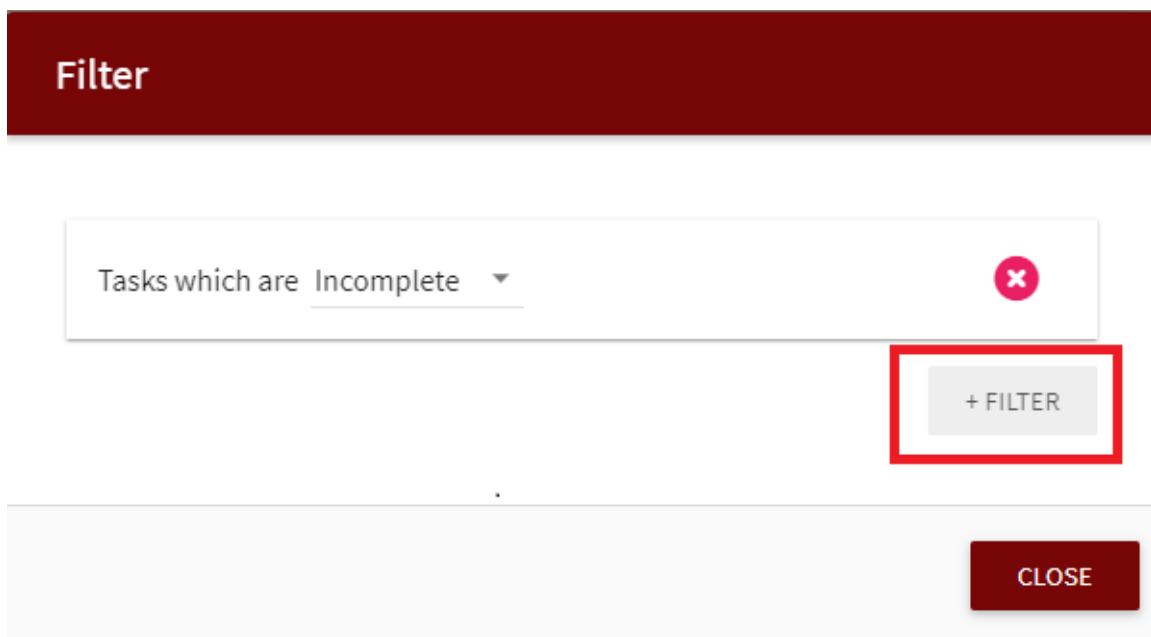
CLOSE

How To Filter By Outstanding Tasks For A Specific Register

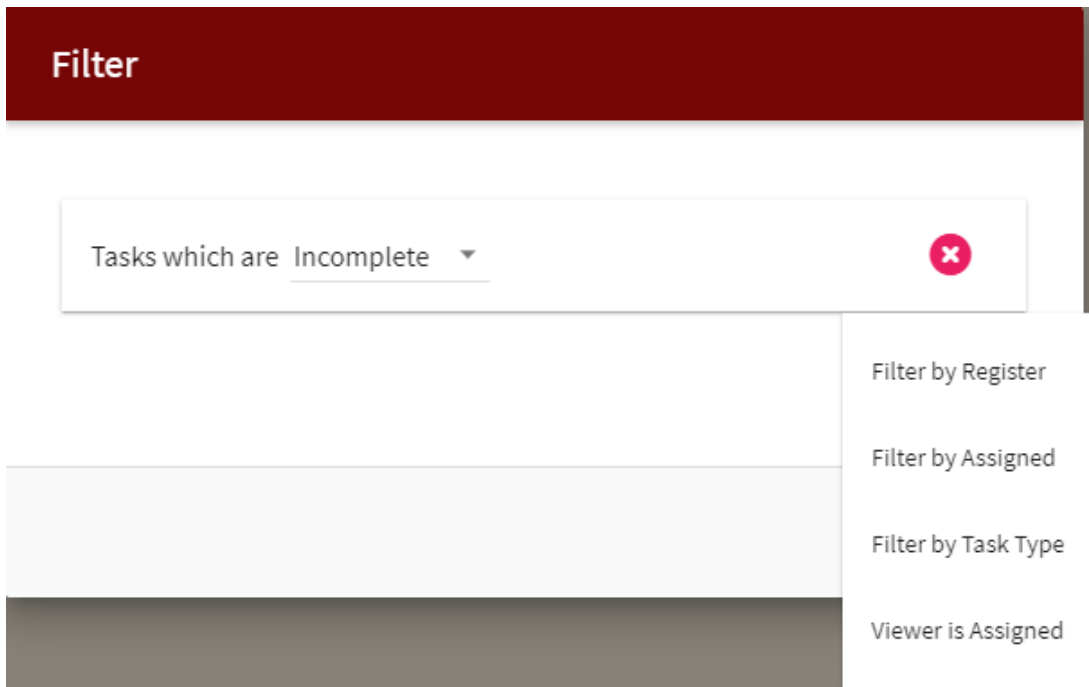
1. Go to the filter screen (go to step 3 of “How to filter by registers”). Select **Filter by Completed**.



2. Click on the drop down arrow and choose the **Incomplete** option.

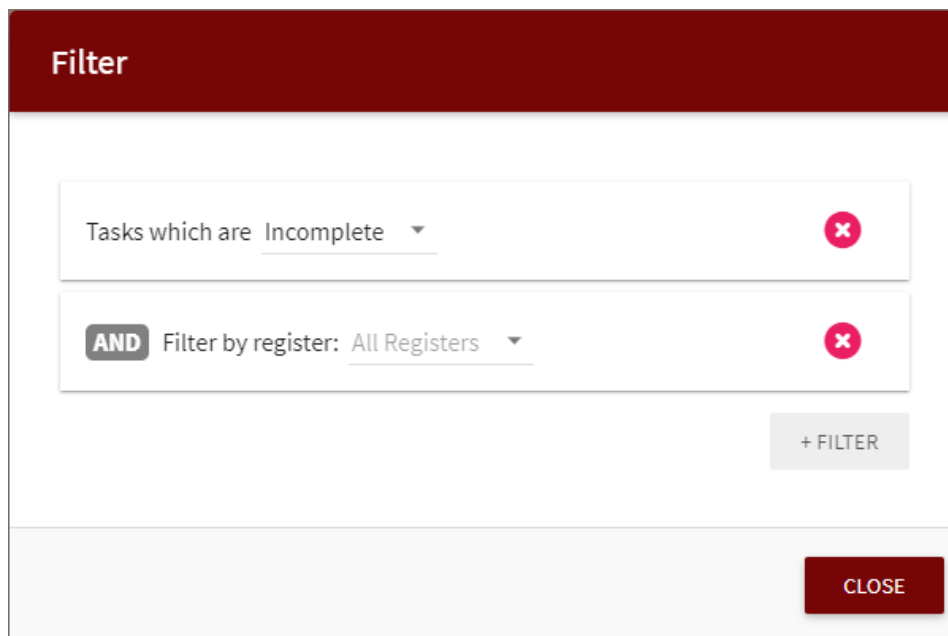


3. Click on the **+ FILTER** button again to add another filter.



The screenshot shows a 'Filter' dialog box with a dark red header. Below the header is a search bar containing the text 'Tasks which are Incomplete' and a dropdown arrow. To the right of the search bar is a red 'X' icon. A dropdown menu is open, listing four options: 'Filter by Register', 'Filter by Assigned', 'Filter by Task Type', and 'Viewer is Assigned'.

4. Click on the **Filter by Register** option.



The screenshot shows the 'Filter' dialog box after selecting 'Filter by Register'. The search bar now contains 'Tasks which are Incomplete'. Below it is a new filter criterion: 'AND Filter by register: All Registers'. To the right of this criterion is a red 'X' icon. At the bottom right of the dialog, there is a '+ FILTER' button and a 'CLOSE' button.

SEMS

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Stage and Entry Icon Colours

Applicable to Mobile & Desktop

Overview

There are three icon colours that you can encounter: red, orange, and green.

Note that the icon colour you see when an entry is open does not represent the same thing as the icon colour of the entry in the register view. Additionally, it is possible to see different colours in the icon when the entry is open to when you look at the entry in a dashboard.

While the entry is open, the colour you see in the icon relates to the level of completion of the stage that you are on in the entry. Note that this only relates to the current stage, and does not indicate the completion of the other stages in the entry, or the entry as a whole.

When you see an entry on a dashboard, the colour you see in the icon is related to the level of completion of the entry.


Red

Seeing a red icon when your entry is open means that the stage you currently have selected within this entry is incomplete and has not been submitted.



Also note that when a stage is not complete, there will be no tick icon in the stage number bubble next to the stage name.

A red icon on the entry, when viewed on a dashboard, means that the first stage of the entry is incomplete.

State	Name	Incident Date	Actual consequence of incident:	Actual severity level:	Reported Date	Location	Involved Party	BU Owner	Critical Risk Group	Status
	<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">  </div> <div> INC-01628 Incident ALL ORGANISATIONS TIMBERLANDS TIMBERLANDS - OHS (SHOW 3 MORE) </div> </div>	Apr 23, 2021		Not Available	Apr 23, 2021	Kaingaroa				Incident Notification

This little icon assists those that are colour blind to determine the status of the incident.

Colour blind icon (open circle) shows the first stage of the entry is incomplete.

Orange

Seeing an orange icon when your entry is open means that the stage you currently have selected within this entry has been submitted but is pending to be signed off for completion.





Incident - Testing of Safety Alerts

UID#: INC-01631
Created Apr 23, 2021
Updated Apr 26, 2021
No upcoming events

- Incident Notification
- Incident Report
- Incident Investigation
- 4 Sign Off**

Note that while the icon is orange, the number bubble next to the stage name will not show a tick icon.

The person to complete this review task and sign off this stage will see a bar with 'Reject' and 'Sign Off' options to do so. Signing off on this review task stage will turn the icon green for that stage, and rejecting this review task stage will turn it red.

YES
NO

Review And Sign Off


PERMISSIONS


ASSIGN TO


SAVE


FORCE COMPLETE
REJECT
SIGN OFF

An orange icon on the entry, when viewed on a dashboard, means that the first stage within the entry is complete and submitted, but one or more other stages within that entry are incomplete.

State	Name	Incident Date	Actual consequence of incident:	Actual severity level:	Reported Date	Location	Involved Party	BU Owner	Critical Risk Group	Status
	<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">  </div> <div> INC-01631 Incident - Testing of Safety Alerts </div> </div> <div style="margin-top: 5px; font-size: small;"> ALL ORGANISATIONS NURSERY TIMBERLANDS </div>	Apr 23, 2021	Minor	Low	Apr 23, 2021	Bare Root		Nursery		Sign Off
	(SHOW 3 MORE)									

Colour blind icon (circle with dot) shows stages in the incident process are incomplete but the first stage is completed.

Green

Seeing a green icon when your entry is open means that the stage you currently have selected within this entry is submitted and complete. Note that this only relates to the current stage and does not indicate the completion of the other stages in the entry, or the entry as a whole.

When a stage is complete, there will be a tick icon in the stage number bubble next to the stage name.





Incident - Testing of Safety Alerts

UID#: INC-01631
Created Apr 23, 2021
Updated Apr 23, 2021
[No upcoming events](#)

★

-  **Incident Notification**
-  Incident Report
-  Incident Investigation
-  Sign Off

A green icon on the entry, when viewed on a dashboard, means that the entry is complete. Specifically, it means that all stages within that entry have been completed and submitted.

State	Name	Incident Date	Actual consequence of incident:	Actual severity level:	Reported Date	Location	Involved Party	BU Owner	Critical Risk Group	Status
	<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">  </div> <div> INC-01631 Incident - Testing of Safety Alerts </div> </div> <div style="font-size: 0.8em; margin-top: 2px;"> ALL ORGANISATIONS NURSERY TIMBERLANDS </div> <div style="font-size: 0.7em; margin-top: 2px;"> (SHOW 3 MORE) </div>	Apr 23, 2021	Minor	Low	Apr 23, 2021	Bare Root		Nursery		

Colour blind icon (circle with tick) shows all stages within that entry have been completed and submitted.

SEMS

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System**

How to Reset a Password

Applicable to Mobile & Desktop

Resetting via the Login Page	65
Resetting via Account Settings	68

Resetting via the Login Page

1. Enter your email address and click NEXT



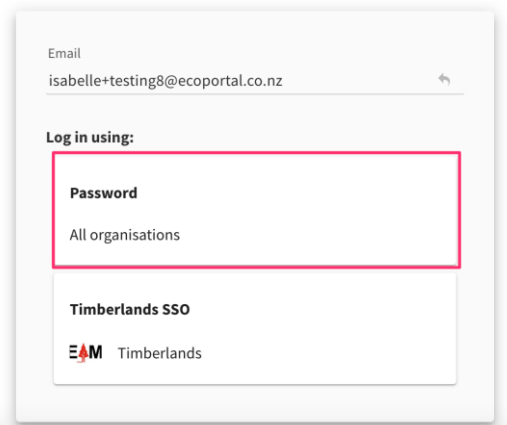
Welcome to SEAMS

A screenshot of the SEAMS login page. It shows a white rectangular form with a light gray border. At the top left of the form, the word 'Email' is written in a small, gray font. Below it, the email address 'isabelle+testing8@ecoportal.co.nz' is entered in a black font. To the right of the email input field, there is a red rectangular button with the word 'NEXT' written in white, uppercase letters.

2. If you have different login options, select **Password**.



Welcome to SEAMS

A screenshot of the SEAMS login page, showing the login options section. The email address 'isabelle+testing8@ecoportal.co.nz' is visible at the top. Below the email field, the text 'Log in using:' is displayed. Underneath, there are two main options: 'Password' and 'Timberlands SSO'. The 'Password' option is highlighted with a red rectangular border. Below 'Password', the text 'All organisations' is visible. Below 'Timberlands SSO', there is a small red tree icon followed by the text 'Timberlands'.

3. Click **Request password reset**.

SEAMS

Welcome to SEAMS

Email
isabelle+testing8@ecoportal.co.nz

Password
Welcome to SEAMS

Remember me

LOGIN

REQUEST PASSWORD RESET

4. Login to your email, and you should receive an email with a **Reset password** link. Click this link.

Timberlands



Reset Password

You can click the link below to reset your password to Timberlands. If you didn't want to reset your password, don't worry - simply ignore this email and your password will not change.

Reset Password

Powered by [ecoPortal](#) - modern management systems.

5. Enter and confirm your new password, then click **Submit**.

SEAMS

Welcome to SEAMS

Password Reset

New Password *

.....

Confirm New Password *

.....

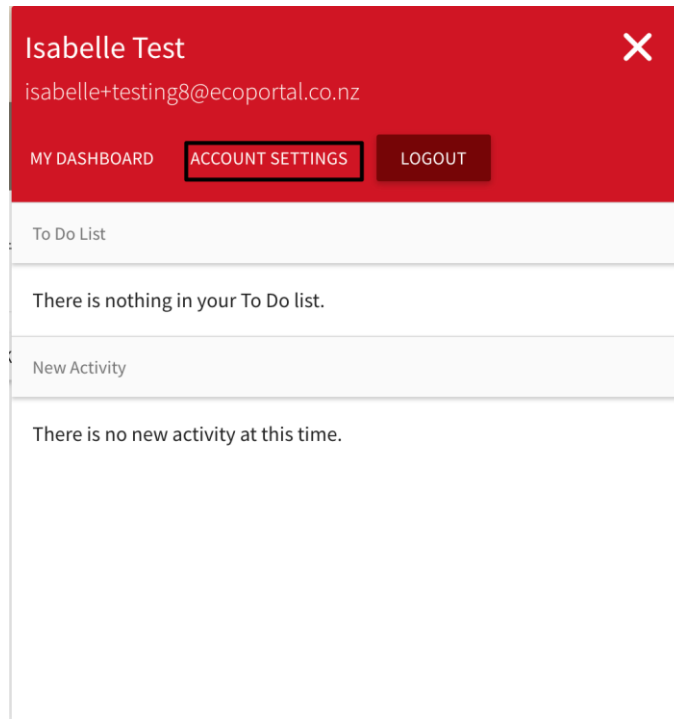
BACK TO LOGIN SUBMIT

Resetting via Account Settings

1. Click on your Profile Picture on the top right of the home screen.



2. Click on **Account settings**



Isabelle Test ✕
isabelle+testing8@ecoportal.co.nz

MY DASHBOARD **ACCOUNT SETTINGS** LOGOUT

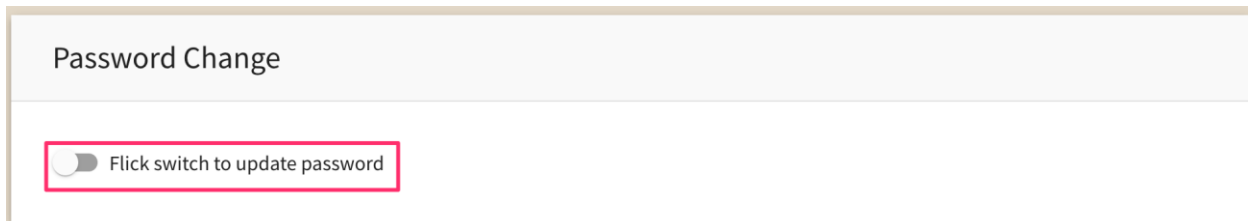
To Do List

There is nothing in your To Do list.

New Activity

There is no new activity at this time.

3. Scroll down to Password Change and click the button labelled “Flick switch to update password”.



Password Change

Flick switch to update password

4. Enter and confirm your new password, then click **Save**.

SEMS

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How to Print

Applicable to Desktop

Introduction

Printing from ecoPortal

This simple guide will help you to print the following items from ecoPortal:

- Entry
- Table view
- Dashboard

An example organisation is used for this guide, but the instructions will work for all organisations. Google Chrome is the browser used for this guide. Some windows may vary for different browsers.

Printing an Entry

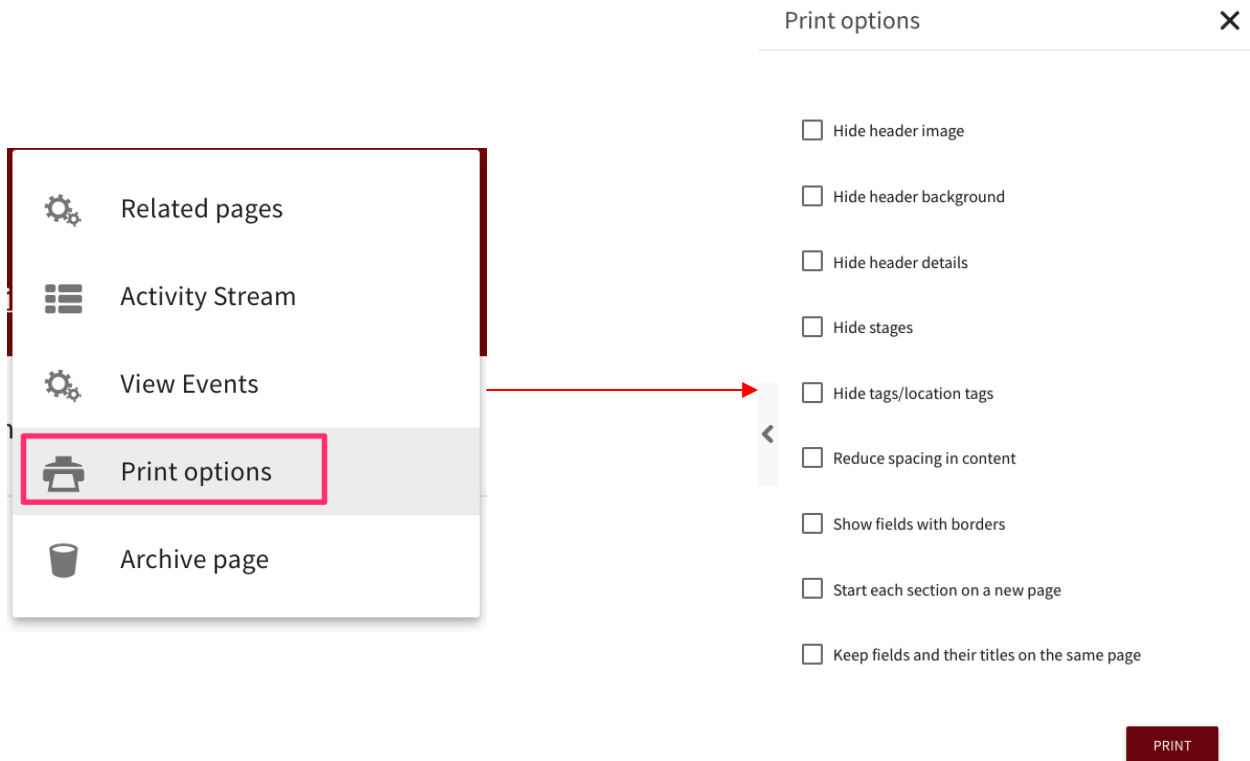
Getting Started

Firstly, navigate to the desired entry you wish to print. You should see a star icon and a three dots icon near the title of the entry, shown in red.



Click on the three dots icon. This will open a 'dropdown' list with many options, such as Related entries, Activity Stream, View Events, Print Options.

Scroll down and click on **Print options**, which will open the menu options to the right labelled **Print options**.



On the menu options, you can use the checklist to adjust options of the print i.e. hide the header image, header background of the entry. Select all that apply to your print.

When you're ready, press the red **Print** button.

This will open a window to configure your printing settings, shown below. The preview of your print is shown on the left. Choose the printer you wish to use by selecting the **destination** (for example, the printer being used in the example is the Canon MX350 series).

You can also change the settings to your preferences. Once ready, click on the **Print** button.

Note: this window will vary depending on your browser.

Printing a Table view

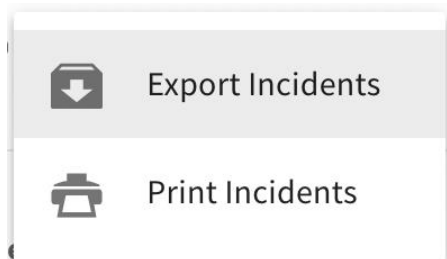
Getting Started

Firstly, navigate to the desired table view you wish to print. On the top right corner, you should see a row of icons as shown.



Click on the gear icon, shown in red above. This will open a 'dropdown' list with two options, shown below.

- Export {register name}
- Print {register name}



Click on **Print {register name}**.

Note: The name of the option may vary depending on the name of your register. The example used above is called the 'Incidents' register. If you are printing a register named 'Hazards', it would instead be **Print Hazards**.

This will open a sidebar to the right labelled **Print Options** where you can adjust options of the print i.e. show a table header on every entry, smaller text on tables.

Print Options



Show a table header on every page (Google Chrome)

Smaller text on tables



Once ready, click on the red **Print** button.

This will open a window to configure your printing settings. The preview of your print is shown on the left. Choose the printer you wish to use by selecting the **destination** (for example, the printer being used in the example is the Canon MX350 series).

You can also change the settings to your preferences. Once ready, click on the **Print** button. Note: this window will vary depending on your browser.

Printing a Dashboard

Getting Started

Firstly, navigate to the desired dashboard you wish to print. On the top right corner, you should see a row of icons as shown.



Click on the printer icon.

This will open a sidebar to the right labelled **Print Options** where you can adjust options of the print. You can:

- Split dashboards into two columns
- Show dashboard with borders

Select all that apply to your print. The functionality of the two options are outlined in the next entry.

Selecting the **Split dashboards into two columns** will allow you to display more information on each entry. The images below compare the first entry of the preview.

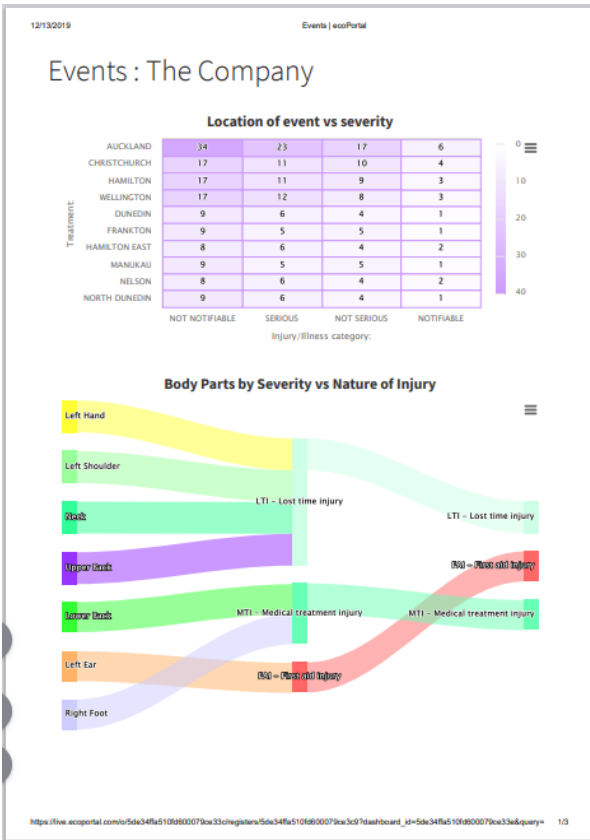


Figure 1: Preview with the option unselected.

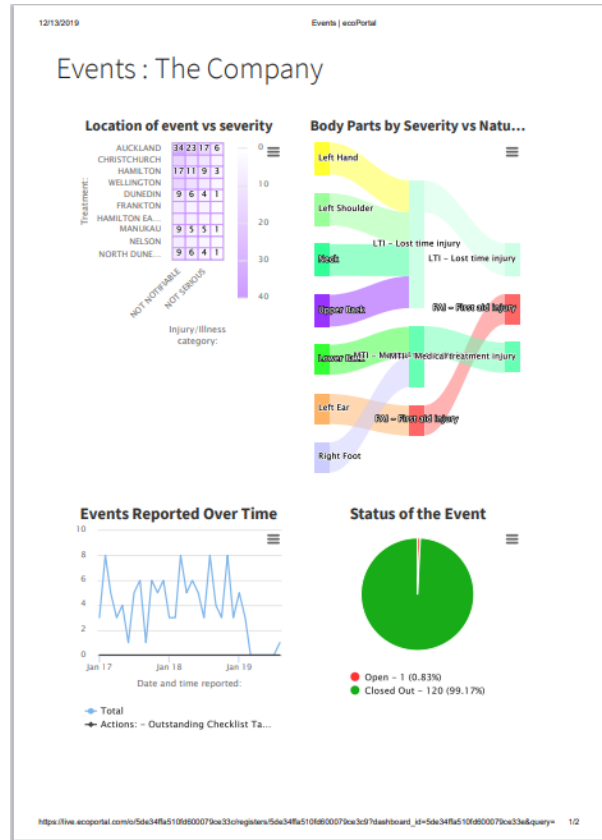


Figure 2: Preview with split dashboards.

Selecting the **Show dashboards with borders** option will place borders around each element of the dashboard, as shown below.

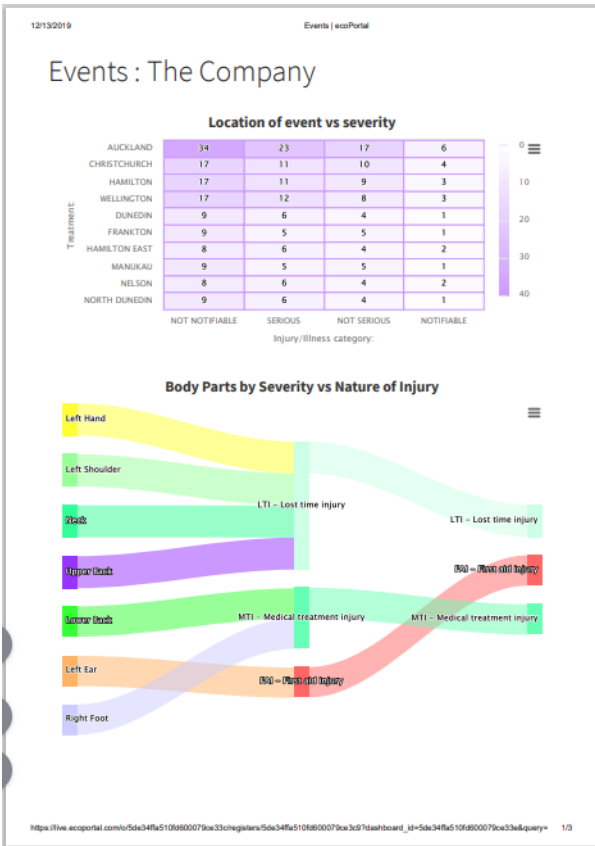


Figure 3: Preview with the option unselected.

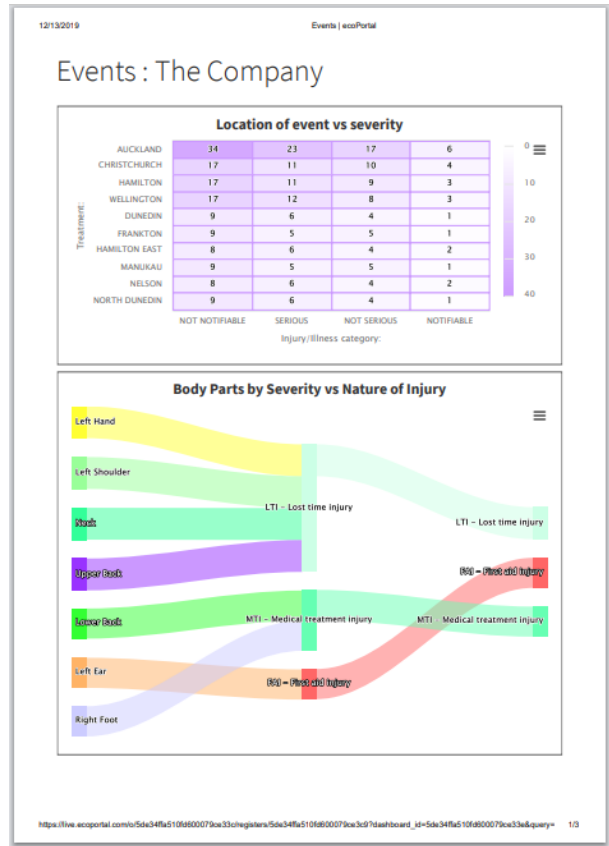


Figure 4: Preview with borders.

To continue, click on **Print**.

Print Options



Split dashboards into two columns

Show dashboard with borders



This will open a window to configure your printing settings. The preview of your print is shown on the left. Choose the printer you wish to use by selecting the **destination** (for example, the printer being used in the example is the Canon MX350 series).

You can also change the settings to your preferences. Once ready, click on the **Print** button. Note: this window will vary depending on your browser.

SEMS

**Safety, Environment
Assurance Management
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How to Apply Filters

Applicable to Mobile & Desktop

Introduction

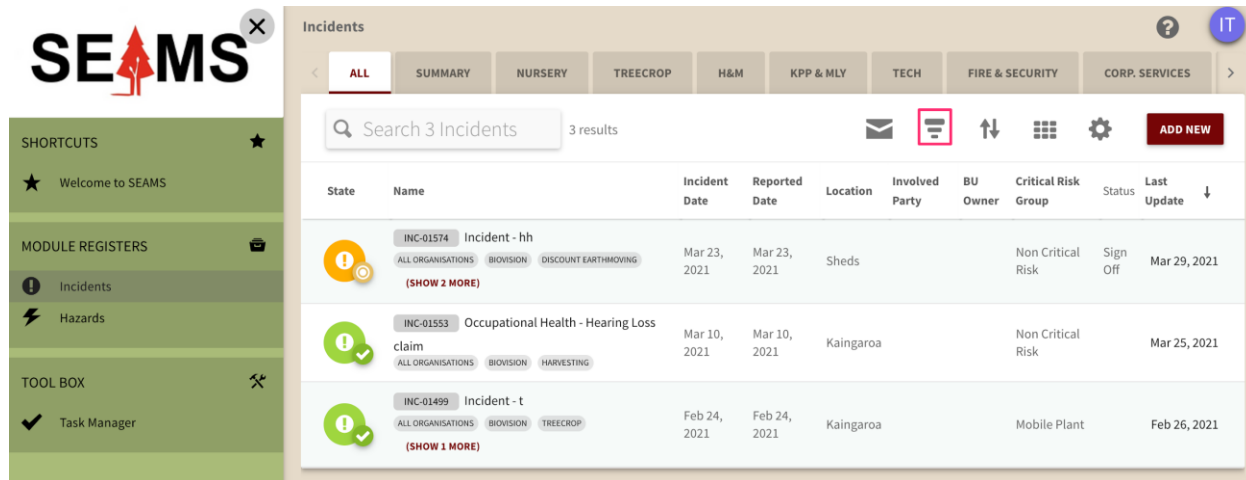
Overview

What are Filters?

Filters are a means of ordering our data. They are useful because they enable us to swiftly sift through large amounts of data to locate a desired entry.

Where are they?

They can be found on any dashboard of any register you have. Look out for the striped symbol as circled below:




The screenshot shows the SEAMS Incidents dashboard. On the left is a navigation menu with sections: SHORTCUTS (Welcome to SEAMS), MODULE REGISTERS (Incidents, Hazards), and TOOL BOX (Task Manager). The main content area is titled 'Incidents' and has tabs for ALL, SUMMARY, NURSERY, TREECROP, H&M, KPP & MLY, TECH, FIRE & SECURITY, and CORP. SERVICES. A search bar shows 'Search 3 Incidents' with 3 results. Below the search bar is a table of incidents. A red box highlights a filter icon (three horizontal lines) in the top right of the table area.

State	Name	Incident Date	Reported Date	Location	Involved Party	BU Owner	Critical Risk Group	Status	Last Update
	INC-01574 Incident - hh ALL ORGANISATIONS BIOVISION DISCOUNT EARTHMOVING (SHOW 2 MORE)	Mar 23, 2021	Mar 23, 2021	Sheds			Non Critical Risk	Sign Off	Mar 29, 2021
	INC-01553 Occupational Health - Hearing Loss claim ALL ORGANISATIONS BIOVISION HARVESTING	Mar 10, 2021	Mar 10, 2021	Kaingaroo			Non Critical Risk		Mar 25, 2021
	INC-01499 Incident - t ALL ORGANISATIONS BIOVISION TREECROP (SHOW 1 MORE)	Feb 24, 2021	Feb 24, 2021	Kaingaroo			Mobile Plant		Feb 26, 2021



Filtering by Date

Getting Started

First, make sure at least one of your entries has a date field. An example date field is shown on the right:



Tue, 17 Mar 2020 CLEAR

Then return to the dashboard. Upon clicking  at the dashboard, click on the **+ Filter** field. Scroll and take note of the Filters with the  symbol next to them.

You should see the following filters:

- Event occurs (all)
- Last updated (all)
- Page created (all)
- YOUR-LABELLED-DATE-FIELD (X)

Where **X** is the number of entries in which a date field with that label occurs. E.g. if I had a date field on each of my three entries and it was called “Clock-in”, then I would see:

 Clock-in (3)


(N.B.) If I had a duplicate date field called “Clock-in” on one of the entries, the count would be (4)

(N.B.) The three (all) date filters will always be available, regardless of date fields on the entries.

Adding an (all) Date Filter

Click on the filter, then fill in the gaps with appropriate dates (order of dates does not matter) as shown:

Filter

"Date and time of the incident:" is between Thu, 1 Apr 2021 and Tue, 6 Apr 2021 

+ Filter

[CLEAR ALL](#) [CANCEL](#) [APPLY](#)

Adding a Date Field Filter

Click on the filter, then either select **is between** (which works like the above picture) or **is a field on the page**.

Mixing it up

The best thing about filters is that they can be compounded with other filters. Click **APPLY** to see the refined results and click the **X** to remove a filter or **CLEAR ALL** to remove all of them.



Filtering by People

Getting Started

First, make sure at least one of your entries has a people field. An example people field is shown on the below:

Investigation team:

SELECT PEOPLE

Then return to the dashboard. Upon clicking  at the dashboard, click on the **+ Filter** field. Scroll and take note of the filters with the  symbol next to them.

The only filters you should see are the ones you have on your entries. E.g. if I had a people field on each of my three entries and it was called “Investigation team”, then I would see:


 Investigation team (3)

(N.B.) If I had a duplicate people field called “Investigation team” on one of the entries, the count would be (4)

Adding a People Field Filter

Click on the filter and you will be presented with the following:

Filter

Investigation team: contains: 

+ Filter

[CLEAR ALL](#) [CANCEL](#) [APPLY](#)

You can now search for people from your organisation in the search bar. Some people fields contain more than one person, so you can keep adding these kinds of filters to look for a group of people on an entry.

Mixing it up

The best thing about filters is that they can be compounded with other filters ad nauseum. Click **APPLY** to see the refined results and click the **X** to remove a filter or **CLEAR ALL** to remove all of them.

Filtering by Select

Getting Started

First, make sure at least one of your entries has a select field. Select fields either appear in flat mode (below left) or in dropdown mode (below right).

Is full PPE worn by all workers?

YES NO N/A

Is full PPE worn by all workers?



-

-


Yes

No

N/A

Then return to the dashboard. Upon clicking  at the dashboard, click on the **+ Filter** field. Scroll and take note of the filters with the  symbol next to them.

The only filters you should see are the ones you have on your entries. E.g. if I had a select field on each of my three entries and it was called “Is full PPE worn by all workers?”, then I would see:

 Is full PPE worn by all workers? (3)

(N.B.) If I had a duplicate people field called “Is full PPE worn by all workers?” on one of the entries, the count would be (4)

Adding a Select Field Filter

Click on the filter, then either select **has any/no options selected**, **has certain options selected** or **is a field on the page**:

Choosing the second option, presents you with the following window:

Filter

"Actual severity level:" contains any of *

+ Filter

CLEAR ALL CANCEL INVALID DATA

Where you choose by which selections you want to filter for or against.

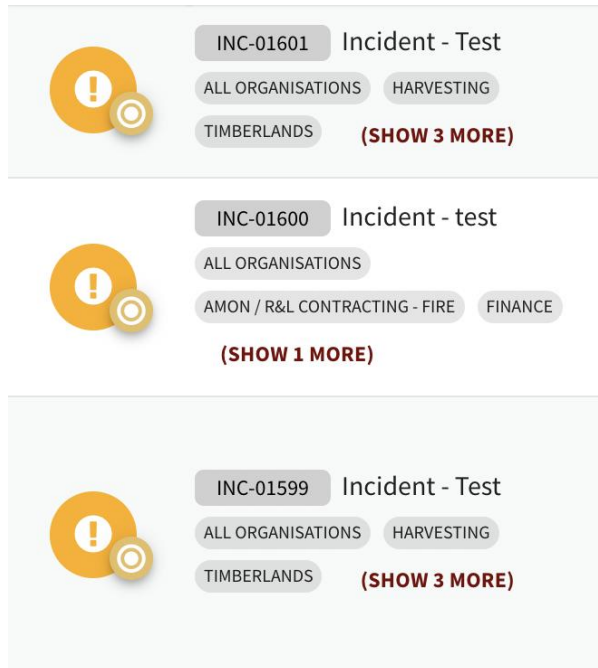
Mixing it up

The best thing about filters is that they can be compounded with other filters. Click **APPLY** to see the refined results and click the **X** to remove a filter or **CLEAR ALL** to remove all of them.



Filtering by Location Tags

Getting Started

First, make sure at least one of your entries has been allocated a location tag. These can be viewed in any dashboard of a register, under the titles of the entries as shown on the right:



The screenshot displays three incident filter cards. Each card features a yellow circular icon with an exclamation mark and a magnifying glass. The first card is for incident INC-01601, titled 'Incident - Test', with filters for 'ALL ORGANISATIONS', 'HARVESTING', and 'TIMBERLANDS', and a '(SHOW 3 MORE)' link. The second card is for incident INC-01600, titled 'Incident - test', with filters for 'ALL ORGANISATIONS', 'AMON / R&L CONTRACTING - FIRE', and 'FINANCE', and a '(SHOW 1 MORE)' link. The third card is for incident INC-01599, titled 'Incident - Test', with filters for 'ALL ORGANISATIONS', 'HARVESTING', and 'TIMBERLANDS', and a '(SHOW 3 MORE)' link.


At the dashboard, click  and then **+ Filter** field. Scroll and take note of the filters with the  symbol next to them.

Adding a Location Tag Filter

Click on the filter, and you'll be presented with the following window:

Filter

Documents have these Location Tags selected:

+ Location Tag 

Tree view

+ Filter

CLEAR ALL

CANCEL

APPLY

Each location tag filter can have as many location tags as you want. The window also allows you to filter for or against these tags, as well as giving you the option of tree view to view all possible tags.

Mixing it up

The best thing about filters is that they can be compounded with other filters. Click **APPLY** to see the refined results and click the **X** to remove a filter or **CLEAR ALL** to remove all of them.

Filtering by Text Field



Getting Started

First, make sure at least one of your entries has a text field. Text fields will either be plain (below left) or richly formatted (below right).

Name:

Name:

B *I* U ☰ ☱ 🔗 🎤

Then return to the dashboard. Upon clicking  at the dashboard, click on the **+ Filter** field. Scroll and take note of the filters with the  symbol next to them

The only filters you should see are the ones you have on your entries. E.g. if I had a plain text field on each of my three entries and it was called “Who was involved:”, then I would see:

T Who was involved: (3)

(N.B.) If I had a duplicate plain text field called “Who was involved:” on one of the entries, the count would be (4).

(N.B.) The filtering system distinguishes between plain and richly formatted text fields, even if they share the same name.

Adding a Text Field Filter

Click on the filter, then either select **contains** or **is a field on the page**.

Choosing the former, results in the window shown on the right, where you can search for text held in the field.

Filter

"1. Who was involved?" contains ✕

+ Filter

CLEAR ALL CANCEL APPLY

Mixing it up

The best thing about filters is that they can be compounded with other filters. Click **APPLY** to see the refined results and click the **X** to remove a filter or **CLEAR ALL** to remove all of them.



Filtering by Number Field

Getting Started


First, make sure at least one of your entries has a number field. An example number field is shown below:

Approximate cost (\$):

22

Then return to the dashboard. Upon clicking  at the dashboard, click on the **+ Filter** field. Scroll and take note of the filters with 

The only filters you should see are the ones you have on your entries. E.g. if I had a number field on each of my three entries and it was called "Approximate cost:", then I would see:


 Approximate cost: (3)

[Adding a Number Field Filter](#)

Click on the filter, then either select **is between** or **is a field on the page**.

Choosing the former results in the below window, where the gaps can be filled with whole numbers (the lower number and higher number can be on either side):

Filter

"Approximate cost (\$):" is between _____ and _____ 

+ Filter

[CLEAR ALL](#) [CANCEL](#) [APPLY](#)

[Mixing it up](#)

The best thing about filters is that they can be compounded with other filters. Click **APPLY** to see the refined results and click the **X** to remove a filter or **CLEAR ALL** to remove all of them.

Filtering by Checklist Task



Getting Started

First, make sure at least one of your entries has a checklist. An example checklist task is shown on the right:


To do:

- Review Form**
Assigned to Todd Stevens.

- Provide Risk Assessment**
Assigned to Todd Stevens.

Then return to the dashboard. Upon clicking  at the dashboard, click on the +  **Filter** field. Scroll and take note of the filters with

The only filters you should see are the ones you have on your entries. E.g. if I had a checklist on each of my three entries and it was called "To do:", then I would see:

 To do: (3)

(N.B.) If I had a duplicate checklist task called "To do:" on one of the entries, the count would be (4)

Adding a Checklist Task Filter

Click on the filter, and you will be presented with the following options:

- Is incomplete and overdue (*is can be toggled to isn't*)
- Has a due date of any checklist task between (*date interval is required*)
- Is all complete (*is can be toggled to isn't*)
- Has assigned (*requires entering a person in*)
- Has outstanding checklist tasks between (*see below*)
- Is a field on the page

Filter

"To do:" has outstanding checklist tasks between and

+ Filter

If you chose the green option, you will be presented with the window above where you can enter **the range of incomplete tasks** on the checklist task.

(N.B.) between 1 and 1 means **exactly 1** incomplete task.

Mixing it up

The best thing about filters is that they can be compounded with other filters. Click **APPLY** to see the refined results and click the **X** to remove a filter or **CLEAR ALL** to remove all of them.

SEMS

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How to Change Email Frequency

Applicable to Mobile & Desktop

Introduction

Overview

This guide teaches you:

- The **types of email notifications** ecoPortal sends
- How to **change email frequency** and what this means for you

Types of Email Notifications

ecoPortal sends email notifications on **tasks** and **comments**. ecoPortal also divides their notices into three **priority** levels: High, Medium, and Low.

High priority includes:

- A step on a form being started, signed off, reopened, or commented on
- A form state being changed or
- A reminder falling due

Medium priority includes:

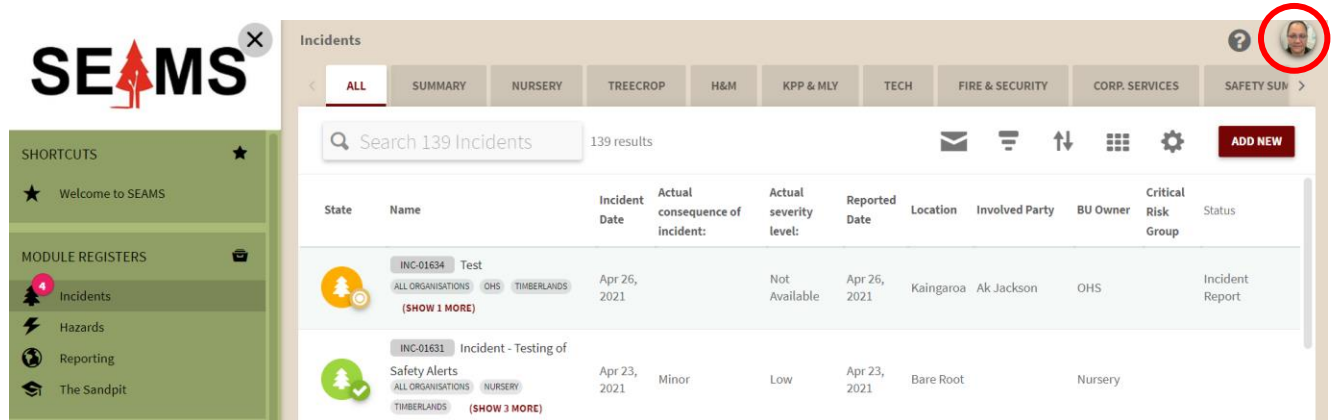
- An account being added or edited
- A form without steps being created or archived

Low priority includes:

- A form being updated
- Organisation being modified

Changing Email Frequency

Your profile image will always be on the top right corner. Click on it.

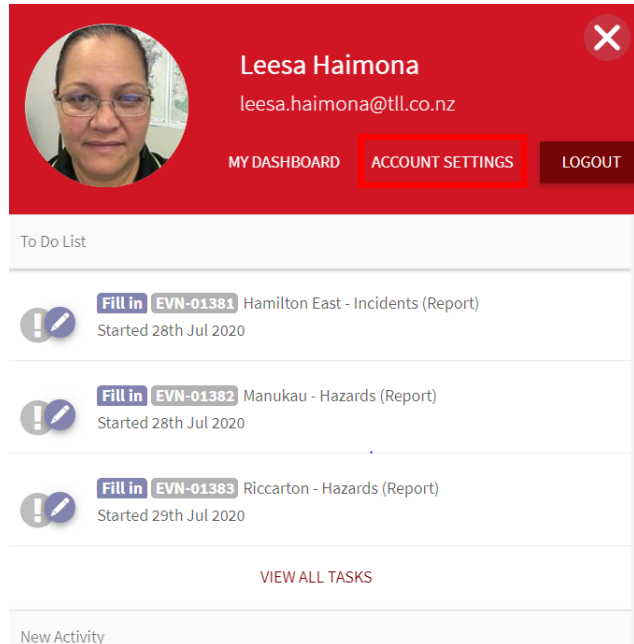


SEAMS Incidents

Search 139 Incidents 139 results

State	Name	Incident Date	Actual consequence of incident:	Actual severity level:	Reported Date	Location	Involved Party	BU Owner	Critical Risk Group	Status
ALL ORGANISATIONS OHS TIMBERLANDS	INC-01634 Test (SHOW 1 MORE)	Apr 26, 2021		Not Available	Apr 26, 2021	Kaingaroa	Ak Jackson	OHS		Incident Report
ALL ORGANISATIONS NURSERY TIMBERLANDS	INC-01631 Incident - Testing of Safety Alerts (SHOW 3 MORE)	Apr 23, 2021	Minor	Low	Apr 23, 2021	Bare Root		Nursery		

Select Account Settings.



Leesa Haimona
leesa.haimona@tll.co.nz

MY DASHBOARD **ACCOUNT SETTINGS** LOGOUT

To Do List

- Fill in EVN-01381** Hamilton East - Incidents (Report)
Started 28th Jul 2020
- Fill in EVN-01382** Manukau - Hazards (Report)
Started 28th Jul 2020
- Fill in EVN-01383** Riccarton - Hazards (Report)
Started 29th Jul 2020

VIEW ALL TASKS

New Activity

In Account Settings, scroll down to find **Email Frequency**. This is where you can change your email frequency preferences. You will be emailed notifications from ecoPortal depending on the options you

selected.

Email Frequency

Task related notices

Notify me about tasks

Notify me about comments

High priority notices
A step on a form has been: started, signed off, reopened, commented on. A form state has changed, or a reminder falls due.

Every 30 minutes ▼

Medium priority notices
An account is added or edited, a form (without steps) has been created or archived

Daily ▼

Low priority notices
A form has been updated, or the organisation has been modified

Weekly ▼

Note: When choosing 'Never', ecoPortal notifications are disabled in your emails and notifications menu.

As shown in the figure below you can turn on/off notifications for **tasks** and notifications about **comments**.

Task related notices

- Notify me about tasks
- Notify me about comments

You can also change the frequency of notifications of different priority levels i.e., high priority, medium priority or low priority.

High priority notices

A step on a form has been: started, signed off, reopened, commented on. A form state has changed, or a reminder falls due.

Every 30 minutes

Medium priority notices

An account is added or edited, a form (without steps) has been created or archived

Daily

Low priority notices

A form has been updated, or the organisation has been modified

Never

Note: When choosing 'Never', ecoPortal notifications are disabled in your emails and notifications menu.

You can set the frequency of receiving notifications on high/medium/low priority notices by clicking on the dropdown list, shown by the red box in the figure below.

High priority notices

A step on a form has been: started, signed off, reopened, commented on. A form state has changed, or a reminder falls due.

Every 30 minutes

The frequency options include:

- Every 5 minutes
- Every 30 minutes
- Every hour
- Daily
- Weekly
- Never

Note: When choosing **Never**, ecoPortal notifications will be disabled in your email and notifications menu.

Be aware when you change your email frequency settings. You may miss high priority notifications if the corresponding frequency is set too low. It is recommended to have higher priority notices be set to a high frequency.

SEMS

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How to Change Your Profile Picture

Applicable to Mobile & Desktop

1. Go to Settings

Upon logging into your organisation, go to the **top-right** of your dashboard and find your **PROFILE PICTURE**.

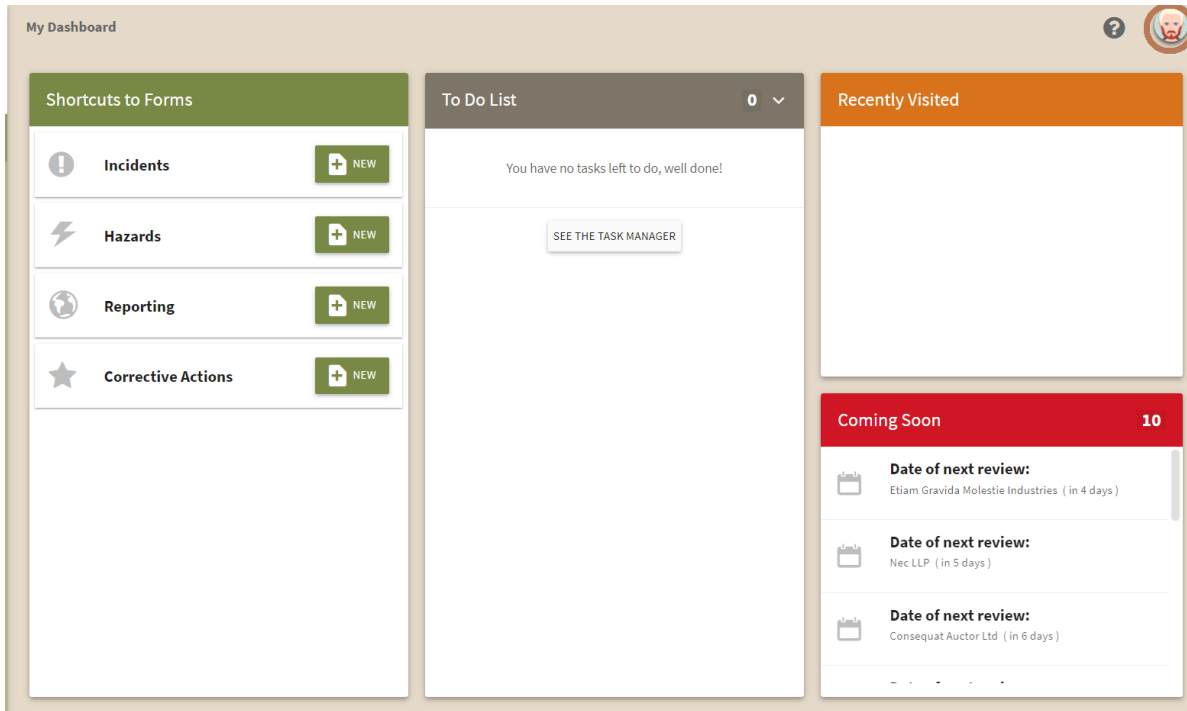


Figure 1: My dashboard

Click on your profile picture, then click on **ACCOUNT SETTINGS**. Note that the default profile picture is just your initials.

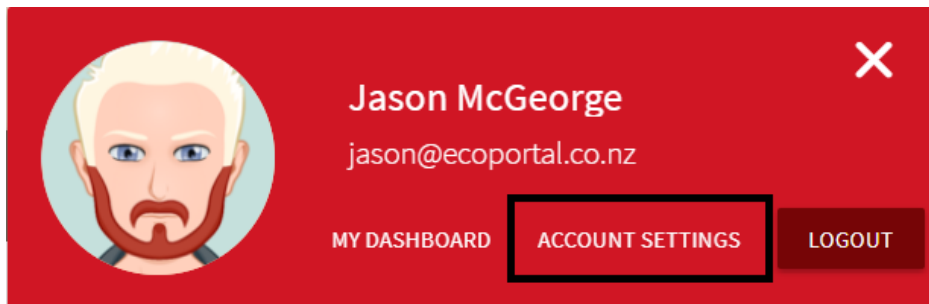
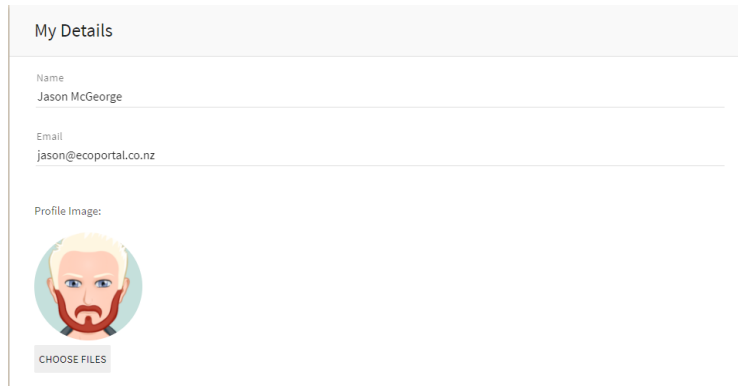


Figure 2: Account settings

2. Choose your Image

Select **CHOOSE FILES**. Browse and select your profile picture.




My Details

Name
Jason McGeorge

Email
jason@ecoportal.co.nz

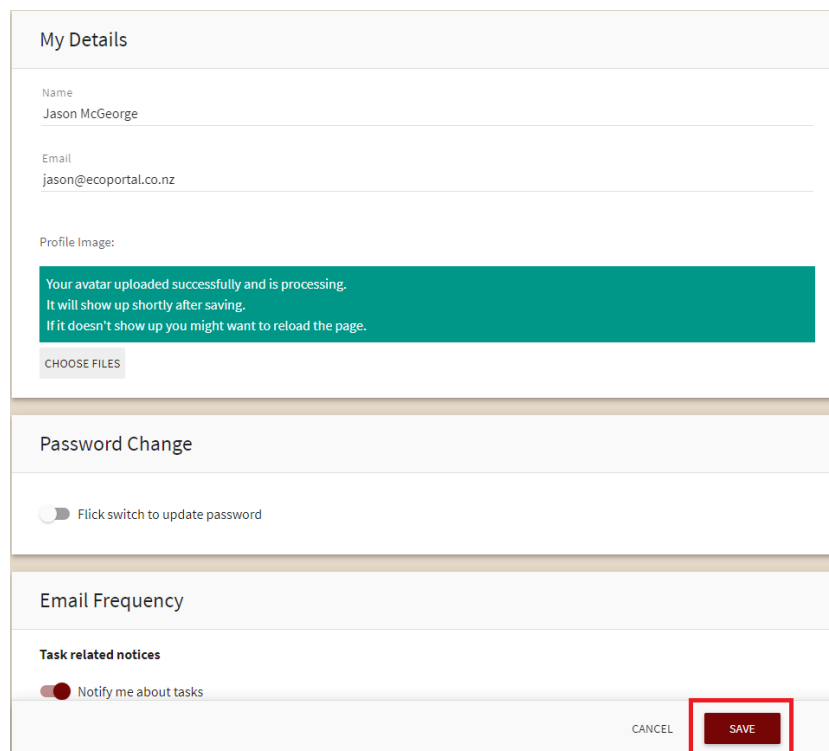
Profile Image:



CHOOSE FILES

Figure 3: Choose files

3. Save
Click **SAVE**.



My Details

Name
Jason McGeorge

Email
jason@ecoportal.co.nz

Profile Image:

Your avatar uploaded successfully and is processing.
It will show up shortly after saving.
If it doesn't show up you might want to reload the page.

CHOOSE FILES

Password Change

Flick switch to update password

Email Frequency

Task related notices

Notify me about tasks

CANCEL **SAVE**

Figure 4: Save

You should see your new profile picture. There may be a small delay, please reload the page if you do not see the new picture immediately.

My Details

Name

Jason McGeorge

Email

jason@ecoportal.co.nz

Profile Image:



CHOOSE FILES

Figure 5: New profile picture

