



Portal TV

NHVR Portal Customer Module Webinar

14 March 2018

9:30am-10:15am AEST

Customising the Portal



Introduction

Panel Members

- Callum Fraser
- Sean Tansley

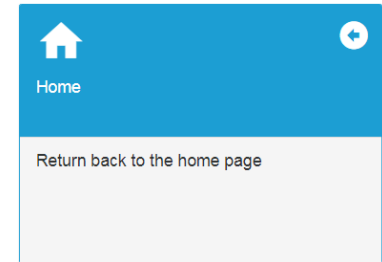
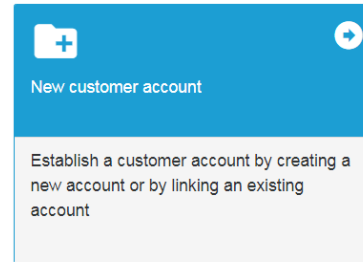
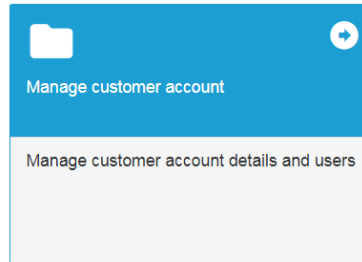
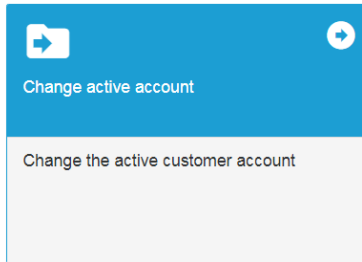
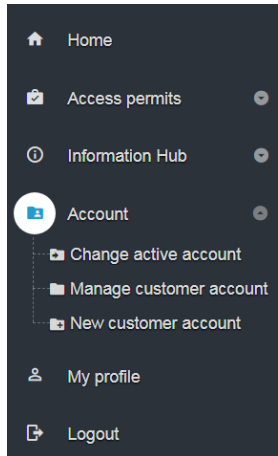
Webinar Format

- Slides (sent to registered participants and available here [Help Centre](#)>
- Predominantly in-portal demonstration will be used
- 'QnA' session at end - to ask questions type these on the right side panel, include your name and organisation
- Viewing on tablet or mobile device – you will not have access to the live QnA, instead email your questions to support@nhvr.gov.au
- A video of webinar along with the QnA will be uploaded to YouTube and the Help Centre

Purpose of Webinar | Managing your Portal Account

The purpose of today's webinar is to look at how you customise the Portal using TABS and TABLES.

We will run through each section of the Portal, giving you practical demonstrations on how to set up TABS and TABLE FILTERS; as well as suggesting some common TAB VIEWS you can create.





Vehicle Configurations



Customising the Portal | Vehicle Configurations

Scenario

Example 1: Create a tab to show how many OSOM vehicles are in the Portal (View for user)

Example 2: Create a TAB to show all Class 2 vehicles (View for whole account)

Example 1

CHANGE THE TABLE

1. Tab Options > Change Columns
2. Column Selector> OSOM Type

Example 2

ADD A TAB

1. Add Tab > Tab name "Class 2"
2. Column Selector> Vehicle Config> Apply
3. Add filter> Vehicle Config> Contains= b-double
4. Tab options> Save as account level tab

Customising the Portal | Vehicle Configurations

The screenshot displays a web portal interface with a dark sidebar on the left and a grid of dashboard tiles on the right. The sidebar menu includes: Home, Access permits, Vehicle configurations, Application tracker, Case tracker, Task tracker, Permit library, Reports, Information Hub, Account, My profile, and Logout. The main grid contains eight tiles:

- Vehicle configurations** (highlighted in yellow): Manage your vehicle configurations for use as part of your new permit applications.
- Application tracker**: Create new, amend, renew or cancel permit applications or complete in progress permit applications.
- Case tracker**: Track the progress of your permit application.
- Task tracker**: Manage tasks.
- Permit library**: Manage your permit library.
- Reports**: Access permit dashboards and reports.
- Home**: Return back to the home page.

DEMONSTRATION



Application Tracker



Customising the Portal | Application Tracker

Scenario

Example 1: Create a view to show all permit applications submitted in the last 30 days (View for user)

Example 2: Create a tab to show only amended permit applications (View for whole account)

Example 1

CHANGE THE TABLE - FILTER

1. Submitted Tab> Submitted date
2. Filter on date> Last 30 days

Example 2

ADD A TAB

1. Add Tab > Tab name "Amend"
2. Column Selector> Application Description> Apply
3. Application column filter> Amend

Customising the Portal | Application Tracker

The image shows a web portal dashboard. On the left is a dark sidebar with the following menu items: Home, Access permits, Vehicle configurations, Application tracker, Case tracker, Task tracker, Permit library, Reports, Information Hub, Account, My profile, and Logout. The main area contains a grid of eight tiles. The top row includes: Vehicle configurations (blue header, truck icon, description: 'Manage your vehicle configurations for use as part of your new permit applications'), Application tracker (green header, folder icon, description: 'Create new, amend, renew or cancel permit applications or complete in progress permit applications'), Case tracker (blue header, grid icon, description: 'Track the progress of your permit application'), and Task tracker (blue header, calendar icon, description: 'Manage tasks'). The bottom row includes: Permit library (blue header, briefcase icon, description: 'Manage your permit library'), Reports (blue header, document icon, description: 'Access permit dashboards and reports'), and Home (blue header, house icon, description: 'Return back to the home page'). The 'Application tracker' tile is highlighted with a yellow border.

DEMONSTRATION



Case Tracker



Customising the Portal | Case Tracker

Scenario

Example 1: Create a view to show all open cases awaiting information from the customer (View for user)

Example 2: Create a TAB to show the case progress for all cases that are being processed (View for whole account)

Example 1

CHANGE THE TABLE - FILTER

1. OPEN Tab> Case status> Customer Info Req (filter) > Apply

Example 2

ADD A TAB

1. Add Tab > Tab name “Case Progress”
2. Column Selector> Case Progress | Durations | Permit Case No | Case Status | Submitted date | Customer reference> Apply
3. Filter Case Status> Includes New, Assigned, Being Assessed, Customer info req, Consent Requested, EoT, Cust Info Req, Finalising (everything listed before Delegated)
4. Tab options > Save as account level tab

Customising the Portal | Case Tracker

The image shows a user interface for a portal. On the left is a dark sidebar with the following menu items: Home, Access permits (with a sub-menu), Vehicle configurations, Application tracker, Case tracker, Task tracker, Permit library, Reports, Information Hub, Account, My profile, and Logout. The main area contains a grid of eight tiles. The 'Case tracker' tile is highlighted with a yellow border and contains the text: 'Track the progress of your permit application'. The other tiles are: 'Vehicle configurations' (Manage your vehicle configurations for use as part of your new permit applications), 'Application tracker' (Create new, amend, renew or cancel permit applications or complete in progress permit applications), 'Task tracker' (Manage tasks), 'Permit library' (Manage your permit library), 'Reports' (Access permit dashboards and reports), and 'Home' (Return back to the home page).

Home	Vehicle configurations Manage your vehicle configurations for use as part of your new permit applications	Application tracker Create new, amend, renew or cancel permit applications or complete in progress permit applications	Case tracker Track the progress of your permit application	Task tracker Manage tasks
Access permits	Permit library Manage your permit library	Reports Access permit dashboards and reports	Home Return back to the home page	

DEMONSTRATION



Task Tracker



Customising the Portal | Task Tracker

Scenario

Example 1: I am going on holiday and need to see all tasks due while I am on leave (View for user)

Example 2: Create a view to show all outstanding notifications for your team (View for whole account)

Example 1

CHANGE THE TABLE

1. MY TASKS> Due Date
2. Filter > Dates between <vacation>

Example 2

ADD A TAB

1. Add Tab > “Team Notifications”
2. Column Selector> Read Flag | Due date | Type | Subject | Status | Start Date | Activity assignee name | Permit Case No | Initiator > Apply
3. Status column> Does not equal = completed, cancelled, withdrawn, rejected
4. Save as account tab

Customising the Portal | Task Tracker

The screenshot displays a web portal interface. On the left is a dark sidebar menu with the following items: Home, Access permits (selected), Vehicle configurations, Application tracker, Case tracker, Task tracker, Permit library, Reports, Information Hub, Account, My profile, and Logout. The main content area features a grid of six blue cards, each with an icon and a description. The 'Task tracker' card is highlighted with a yellow border and contains a green header with a calendar icon and the text 'Task tracker', and a yellow body with the text 'Manage tasks'. The other cards are: 'Vehicle configurations' (truck icon), 'Application tracker' (document icon), 'Case tracker' (calendar icon), 'Permit library' (briefcase icon), 'Reports' (document icon), and 'Home' (house icon).

Card Title	Description
Vehicle configurations	Manage your vehicle configurations for use as part of your new permit applications
Application tracker	Create new, amend, renew or cancel permit applications or complete in progress permit applications
Case tracker	Track the progress of your permit application
Task tracker	Manage tasks
Permit library	Manage your permit library
Reports	Access permit dashboards and reports
Home	Return back to the home page

DEMONSTRATION



Permit Library



Customising the Portal | Permit Library

Scenario

Example 1: View all current permits (View for user)

Example 2: View permits expiring within 42 days (View for whole account)

Example 1

CHANGE TABLE - FILTERS

1. Add Tab> Tab name “Permits”
2. Tab options> Change columns
3. Column Selector> Legacy Permit number | Current permit version | workflow state> Apply
4. Add filter on Workflow State> Permit Issued> Apply

Example 2

ADD A TAB

1. Add Tab> Tab name “Expire in 42”
2. Tab options> Change columns
3. Column Selector> Legacy Permit number | Current permit version | workflow state> Apply
4. Add filter on Workflow State> Permit Issued > Apply
5. Add filter on Permit End Date> due in 42> Apply

Customising the Portal | Permit Library

The screenshot displays a user interface for a permit management portal. On the left is a dark sidebar menu with the following items: Home, Access permits (selected), Vehicle configurations, Application tracker, Case tracker, Task tracker, Permit library, Reports, Information Hub, Account, My profile, and Logout. The main content area features a grid of seven feature cards:

- Vehicle configurations**: Manage your vehicle configurations for use as part of your new permit applications.
- Application tracker**: Create new, amend, renew or cancel permit applications or complete in progress permit applications.
- Case tracker**: Track the progress of your permit application.
- Task tracker**: Manage tasks.
- Permit library** (highlighted in yellow): Manage your permit library.
- Reports**: Access permit dashboards and reports.
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Reports



Customising the Portal | Reports

Navigate around the Account Dashboard

1. Clicking on the fields opens the supporting table - Assessment>
2. Use the table filters to sort the table view
3. Click on the line to open the case

Navigate around the user dashboard

1. View all of the users on the account
2. Add a TAB to display account activation status or other fields like access level

Customising the Portal | Reports

The screenshot displays a user interface for a portal. On the left is a dark sidebar menu with the following items: Home, Access permits (with a sub-menu), Vehicle configurations, Application tracker, Case tracker, Task tracker, Permit library, Reports, Information Hub, Account, My profile, and Logout. The main area contains seven tiles arranged in two rows. The top row includes: 'Vehicle configurations' (blue header, truck icon, description: 'Manage your vehicle configurations for use as part of your new permit applications'), 'Application tracker' (blue header, document icon, description: 'Create new, amend, renew or cancel permit applications or complete in progress permit applications'), 'Case tracker' (blue header, grid icon, description: 'Track the progress of your permit application'), and 'Task tracker' (blue header, calendar icon, description: 'Manage tasks'). The bottom row includes: 'Permit library' (blue header, briefcase icon, description: 'Manage your permit library'), 'Reports' (green header, bar chart icon, description: 'Access permit dashboards and reports'), and 'Home' (blue header, house icon, description: 'Return back to the home page'). The 'Reports' tile is highlighted with a yellow border.

DEMONSTRATION



Administrators



Customising the Portal | Administrators

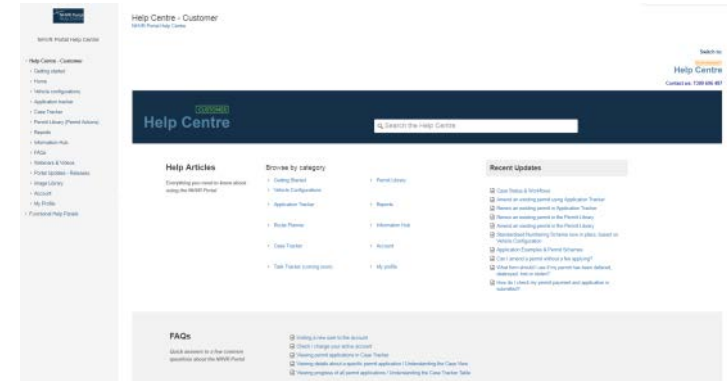
1. **Delete personal tab**
2. **Save as account level tab**
 - **Remove account level tab**
 - **Prevent users personalising the tab**
3. **Export view or rows**

More Information | User Support

Online Support is available 24/7 via the Help Centre

- Videos
- FAQs
- Help Articles
- Past Webinars

<https://help.nhvr.gov.au/support>



Phone support is available via the Call Centre

Contact us on: **1300 MYNHVR** (1300 696 487)

Standard 1300 call charges apply (check with your phone provider).

Hours of operation 7:00am – 5:00pm (AEST) Monday to Friday.

Closed on weekends and all national public holidays.



Thank you

Please get in touch

accessconnect@nhvr.gov.au

or

<https://www.nhvr.gov.au/>

