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

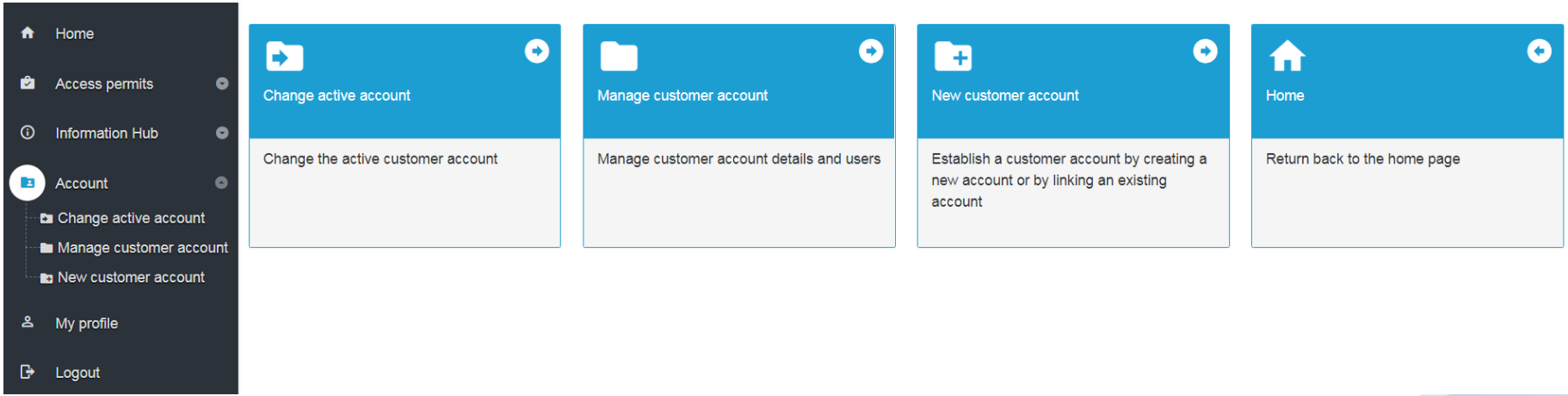
Webinar Format

- 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

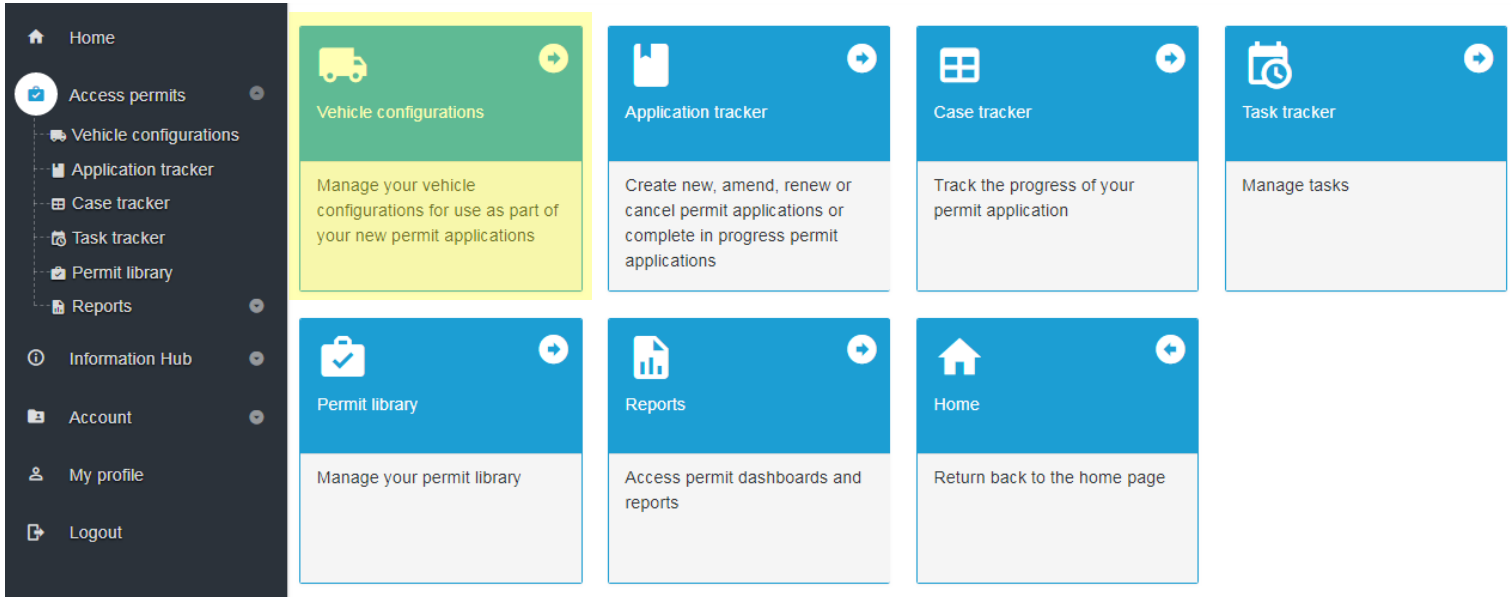
1. Tab Options > Change Columns
2. Column Selector> OSOM Type

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



DEMONSTRATION

Application Tracker

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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

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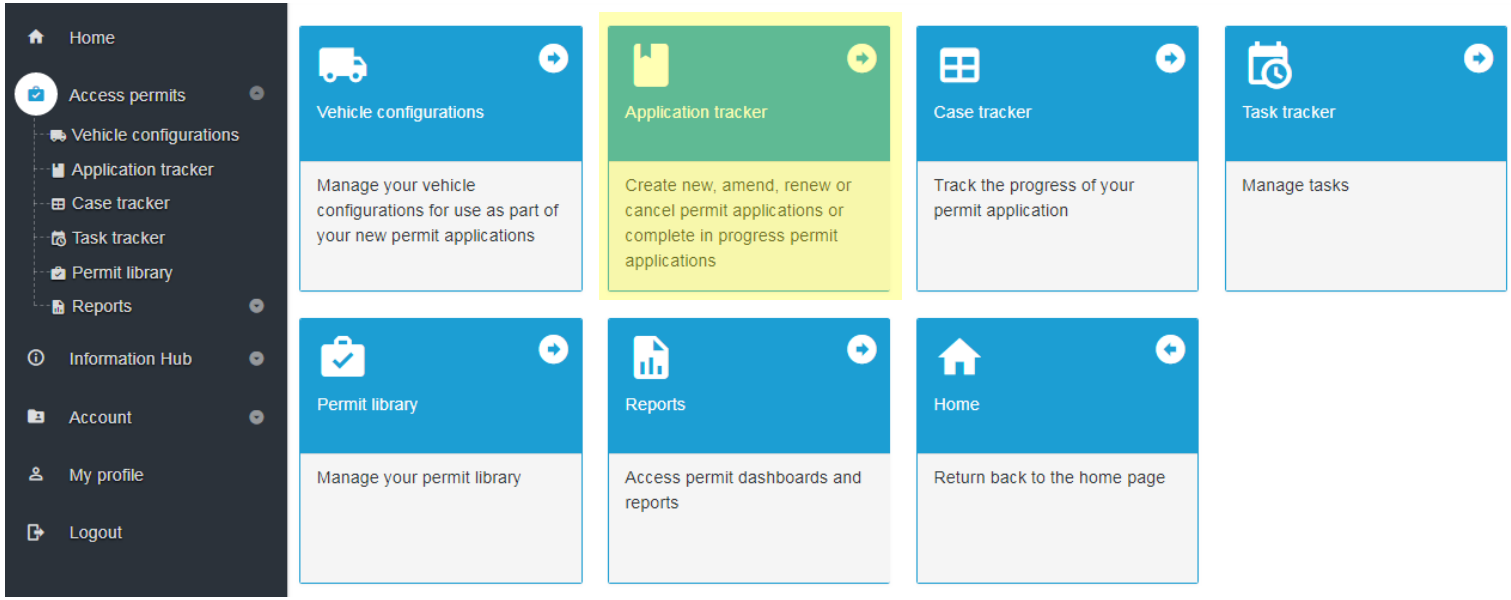

DEMONSTRATION

Case Tracker

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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

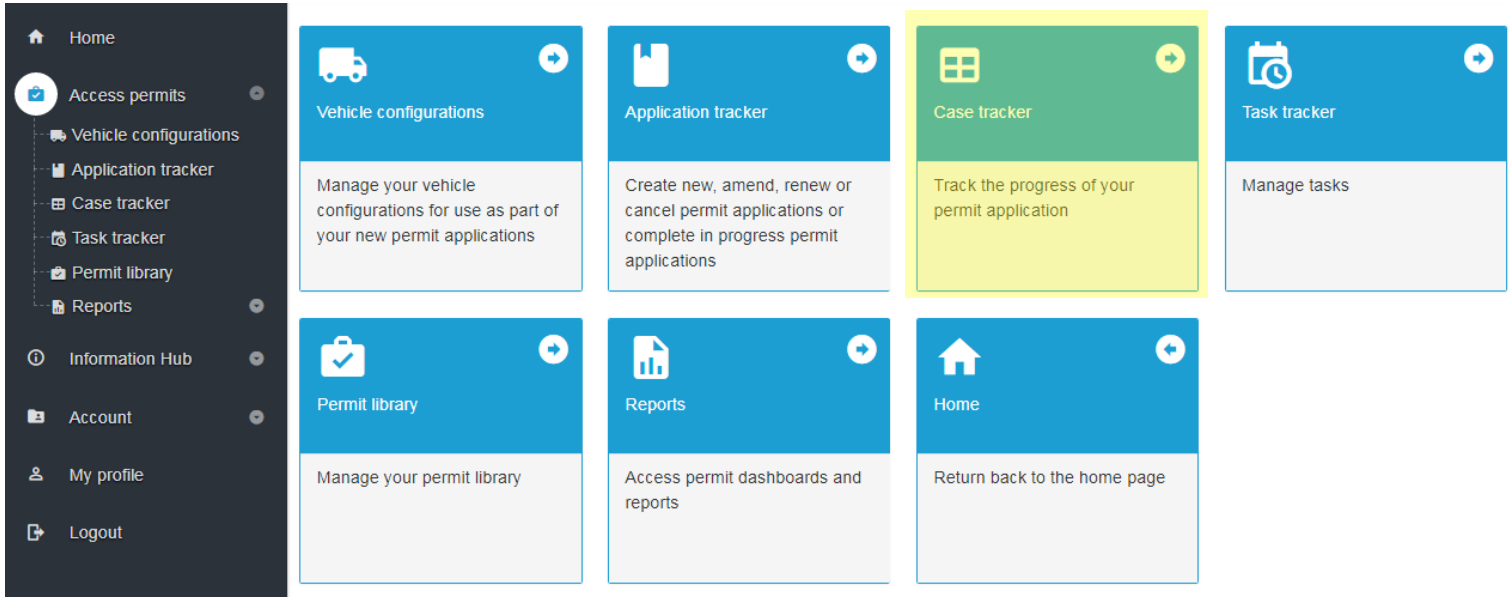
1. OPEN Tab> Case status> Customer Info Req (filter) > Apply

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



DEMONSTRATION

Task Tracker

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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

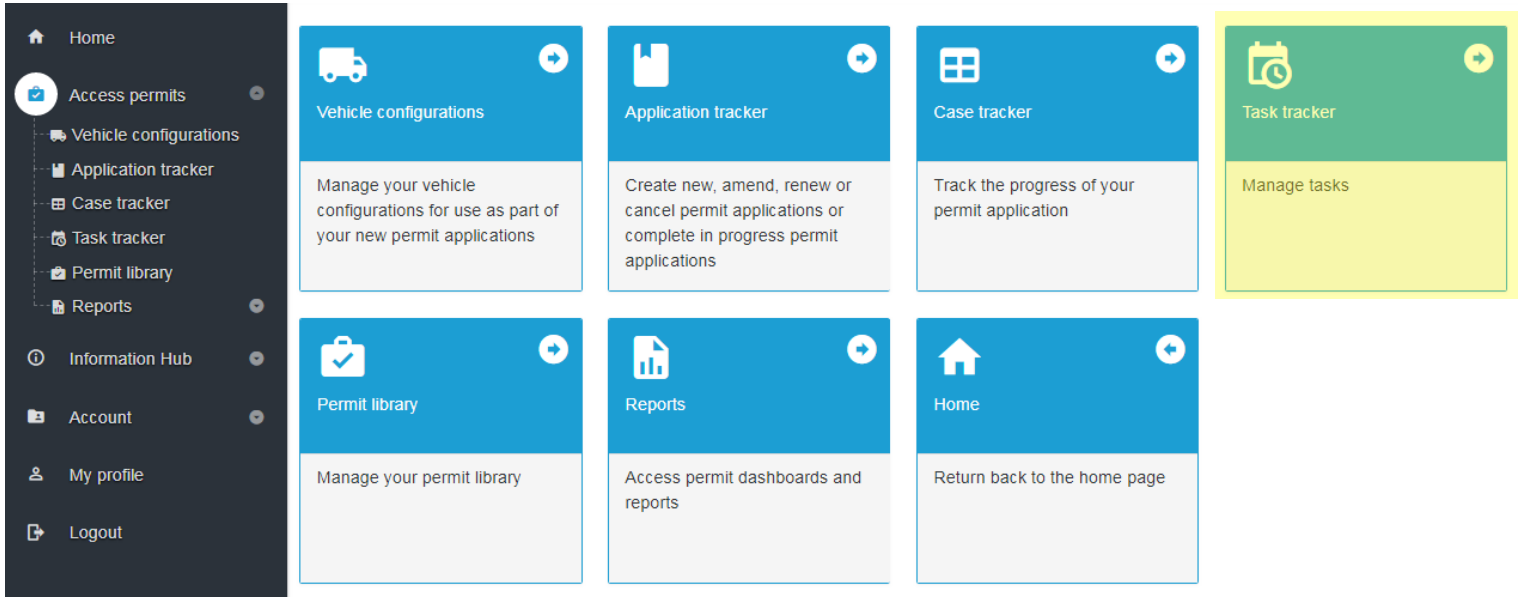
1. MY TASKS> Due Date
2. Filter > Dates between <vacation>

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



DEMONSTRATION

Permit Library

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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

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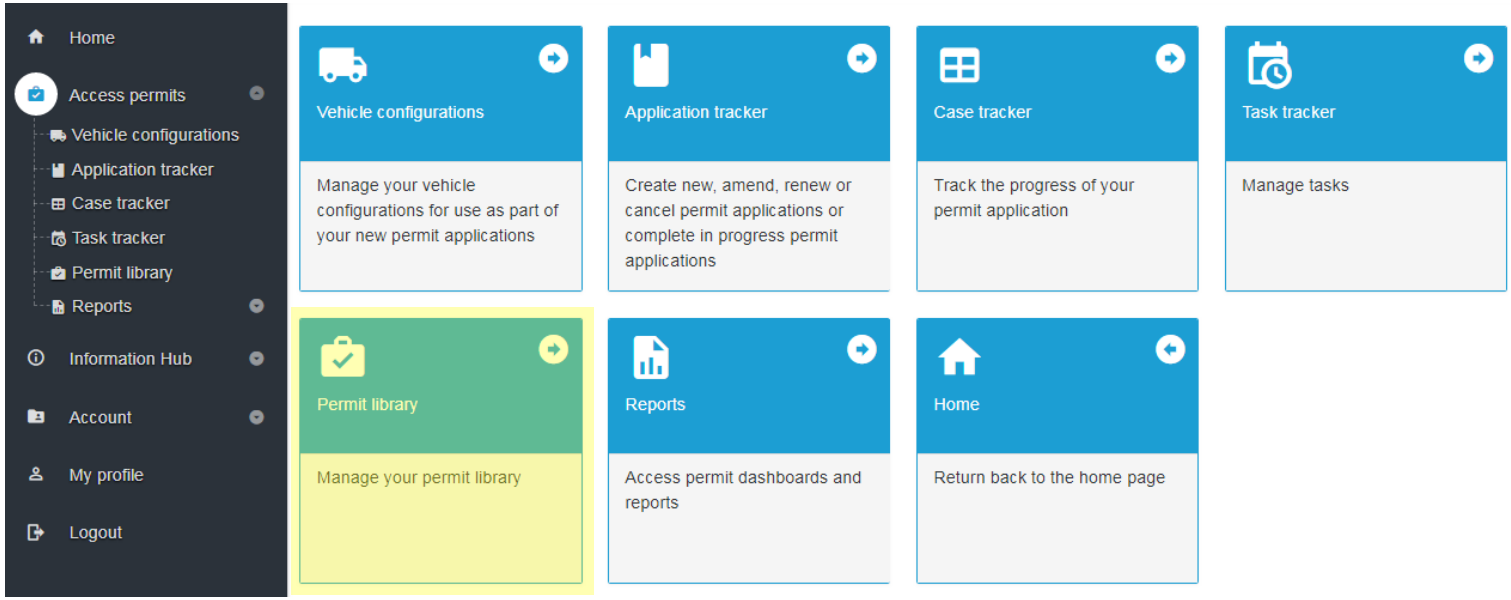


DEMONSTRATION

Reports

Customising the Portal| Reports

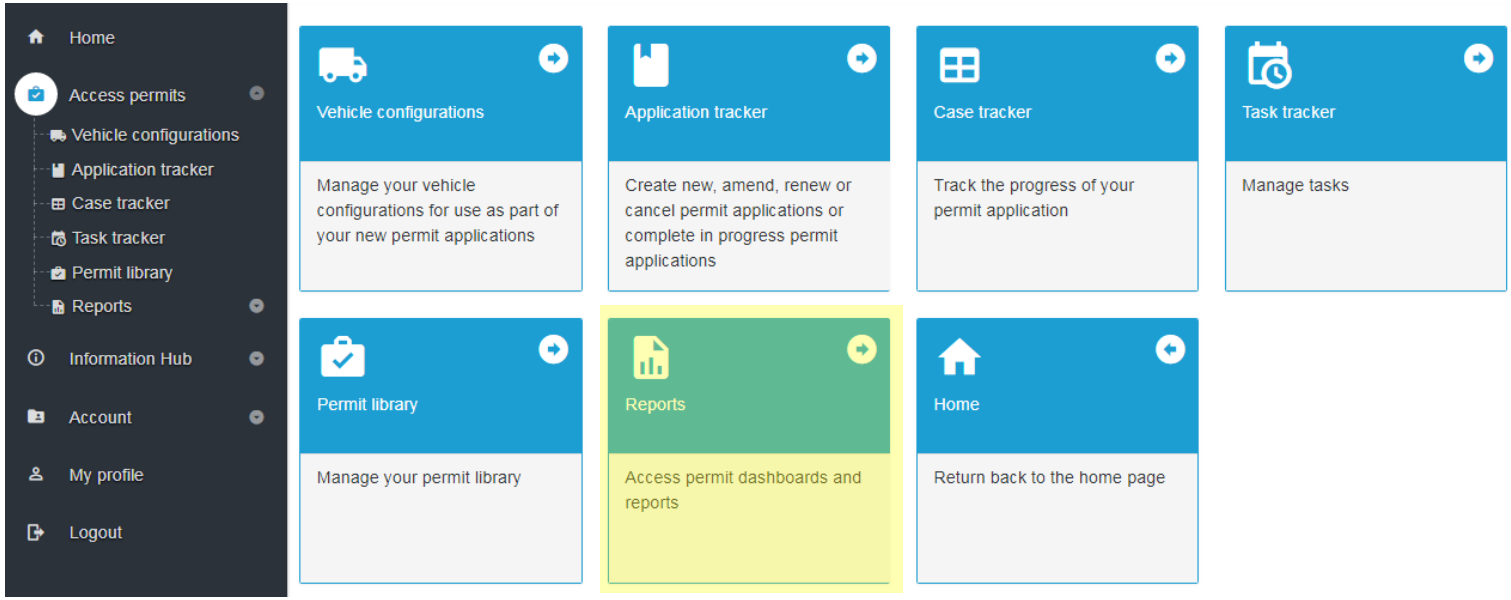
Navigate around the Account Dashboard

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



DEMONSTRATION

Administrators

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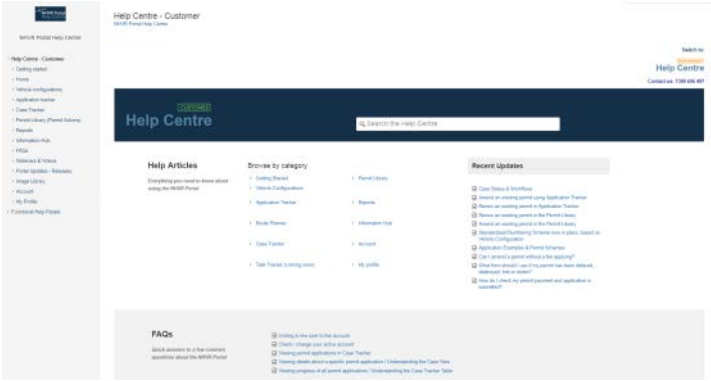
1. **Delete personal tab**
2. **Save as account level tab**
   - **Remove account level tab**
   - **Prevent users personalising the tab**
3. **Export view or rows**

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.

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Thank you

Please get in touch

accessconnect@nhvr.gov.au

or

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