



# **NATA Portal – Committee Members Reference Guide**

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**July 2020**

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*The purpose of this document is to act as a Guide on how to use the NATA Portal.*

*If you need any further assistance, please contact your Sector Manager or Ann-Marie Key on 03 9274 8200 or [Ann-Marie.key@nata.com.au](mailto:Ann-Marie.key@nata.com.au)*

# 1. Getting Started

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## Browser Compatibility

NATA Portal is Compatible with both desktop and mobile (Windows PC, OS X, Android and iOS)

Supports the latest versions of the following browsers:

Google Chrome, Microsoft Edge, Mozilla Firefox and Apple Safari



No Support for Internet Explorer



## Registration

Your completed Registration Form will automatically be submitted to NATA for approval. Once approved as a Committee Member, you will receive an email to set up a password for the NATA Portal login. Follow and complete the steps to set your password.

## Setting up 2 Step Verification

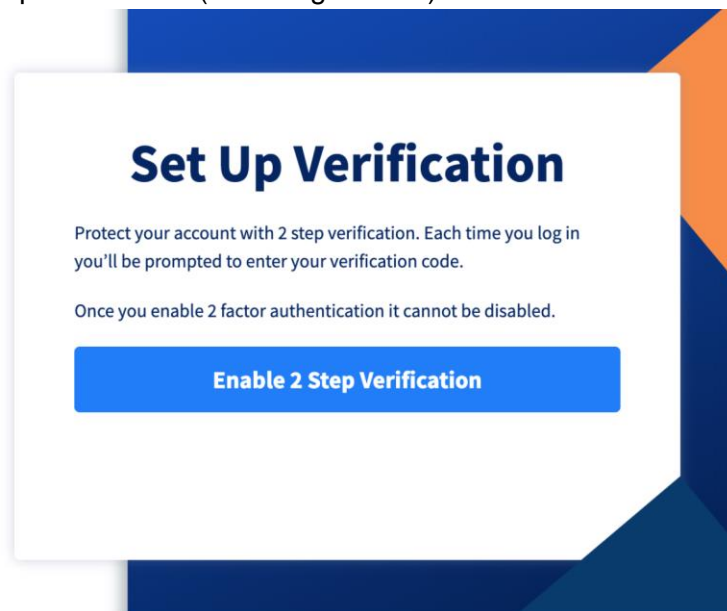
2 Step Verification allows for added security to your access of the NATA Portal. It allows you to verify that you are the legitimate holder of the login credentials by sending you a code to your mobile device and only allowing you access once inputting this code.

Please note that the steps of receiving and inputting a new verification code will need to be repeated when:

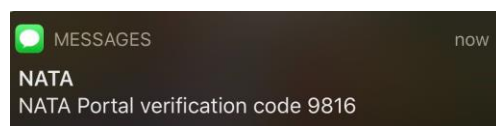
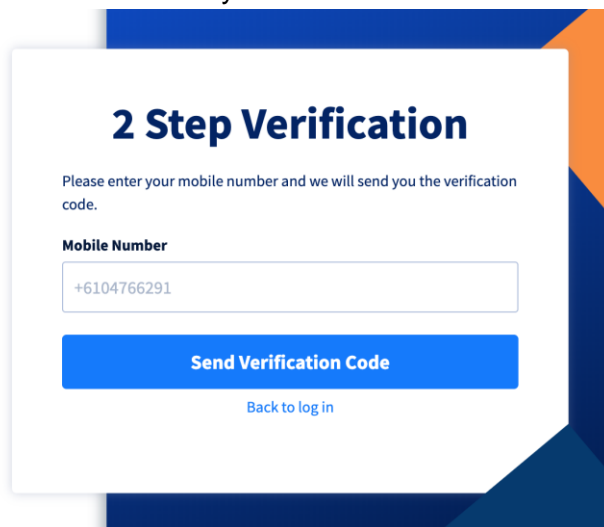
- Accessing the Portal from another device (e.g. another computer)
- After 15 days when the verification expires

## Steps

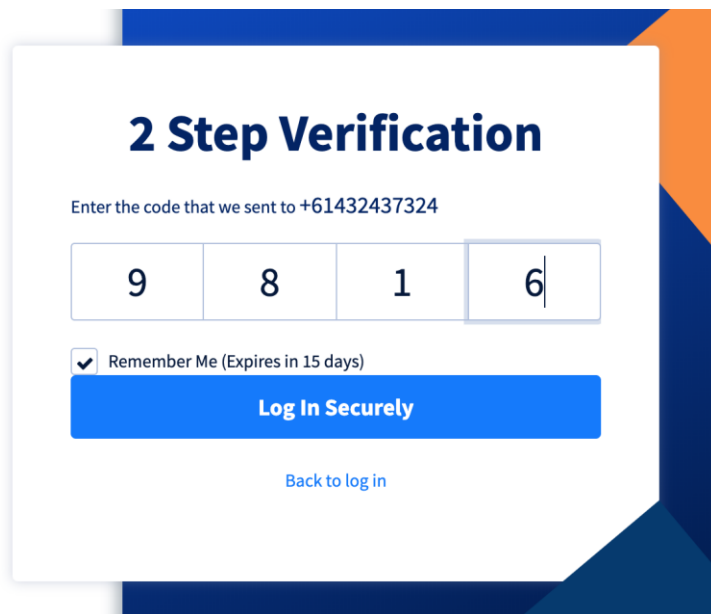
1. Using your email address and your newly set password, log in to NATA Portal. Here you will be presented with a Set Up Verification screen where you will be able to enable your 2 Step Verification (see image below)



2. Click on *Enable 2 Step Verification*
3. Enter your Mobile contact number in the correct format. You will then receive a Verification code to your mobile device as shown below.



4. Use your Verification code to Log-in Securely into the NATA Portal.



**2 Step Verification**

Enter the code that we sent to +61432437324

9	8	1	6
---	---	---	---

☒ Remember Me (Expires in 15 days)

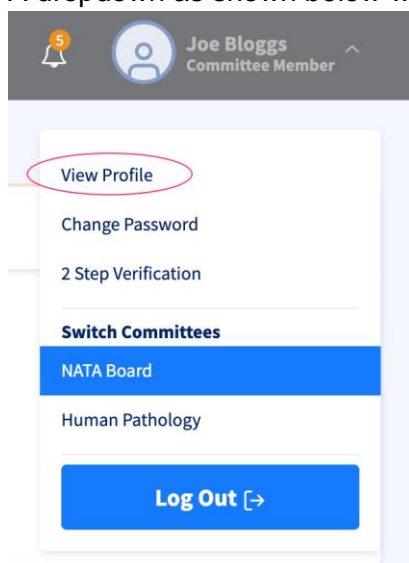
**Log In Securely**

[Back to log in](#)

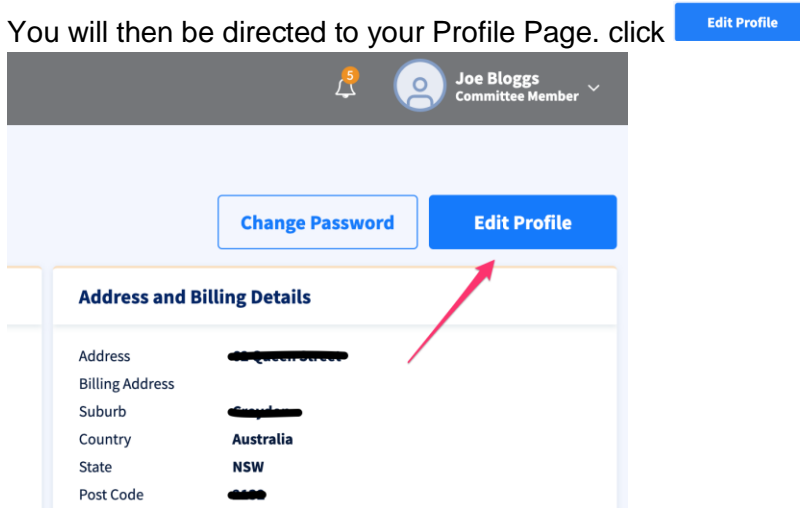
## Editing Profile Information

To edit your profile information, follow the below steps:

1. Once you have logged in to the NATA Portal, click on your profile name at the top right corner of your screen.
2. A dropdown as shown below will appear, click View Profile.

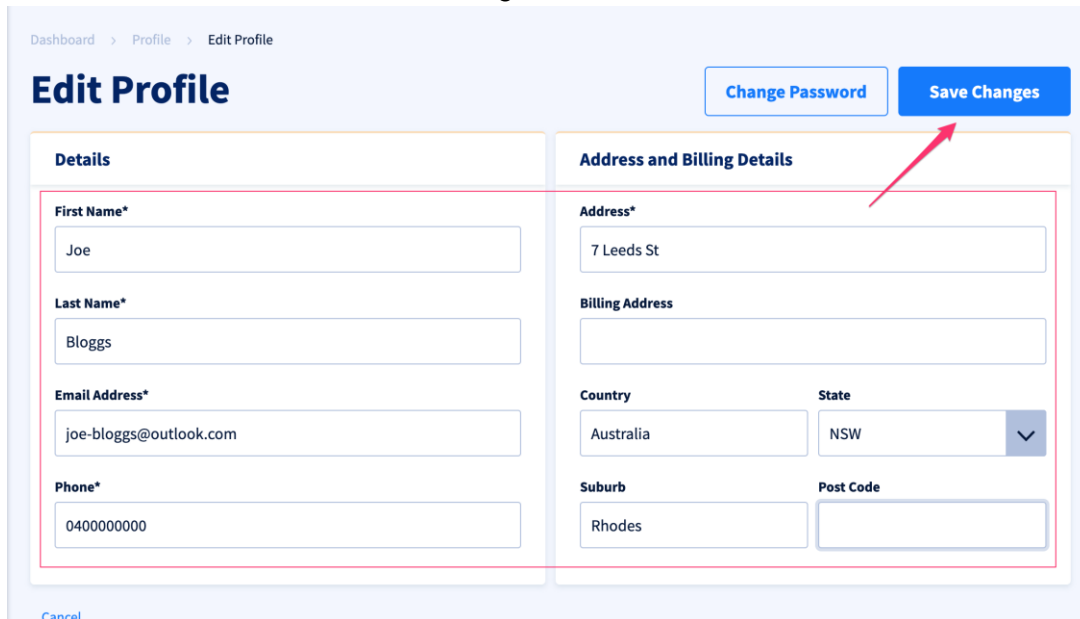


3. You will then be directed to your Profile Page. click



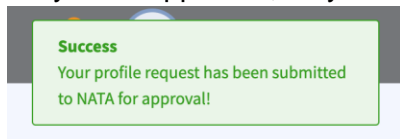
The screenshot shows the top of a web application. At the top right, there is a user profile header for 'Joe Bloggs Committee Member' with a dropdown arrow. Below this, there are two buttons: 'Change Password' and 'Edit Profile'. The 'Edit Profile' button is highlighted with a red arrow. Below the buttons is a section titled 'Address and Billing Details' which contains a list of fields: Address, Billing Address, Suburb, Country (Australia), State (NSW), and Post Code. The values for these fields are partially obscured by black redaction marks.

4. From here you will be able to make all the necessary changes to your profile information. The fields are shown in the below image.



The screenshot shows the 'Edit Profile' form. At the top, there is a breadcrumb trail: 'Dashboard > Profile > Edit Profile'. The form has a title 'Edit Profile' and two buttons: 'Change Password' and 'Save Changes'. The 'Save Changes' button is highlighted with a red arrow. The form is divided into two main sections: 'Details' and 'Address and Billing Details'. The 'Details' section contains fields for 'First Name\*' (Joe), 'Last Name\*' (Bloggs), 'Email Address\*' (joe-bloggs@outlook.com), and 'Phone\*' (0400000000). The 'Address and Billing Details' section contains fields for 'Address\*' (7 Leeds St), 'Billing Address', 'Country' (Australia), 'State' (NSW), 'Suburb' (Rhodes), and 'Post Code'. A red box highlights the 'Details' section.

5. Click on **Save Changes** once complete. You will be directed back to your Profile Page and will receive the alert shown below. Please note: Your changes will not be reflected immediately. They are subject to approval by the NATA Portal System Administrator. Only once approved, they will reflect as per the green box below.



The screenshot shows a green success alert box with the text: 'Success Your profile request has been submitted to NATA for approval!'. The box has a green border and a green background.

## Dashboards and Switching Committees

When logged into the NATA Portal your default page will be displayed in the grey banner on the Dashboard.

The Dashboard includes a quick view of information pertaining to the Committee you are viewing. This includes:

- Your pending Notifications
- Upcoming Meetings
- Recently uploaded Meeting Documents
- Recently added Publications to which you are subscribed

Clicking on any of the Notifications or Upcoming Meetings will automatically navigate you to the location in the portal where you will find the source. For example, if you click on a new comment posted on a Forum discussion, you will be navigated to that discussion.

**Human Pathology**

Dashboard

Active Committee

Notifications

Joe Bloggs  
Committee Member

**Notifications** [View Notifications](#)

- New comment posted on This is my second post
- New comment posted on This is my second post
- New Invite: Created on Laptop - 20/03/24 11:00 am
- New comment posted on This is my second post
- New comment posted on This is my second post

[Clear all](#)

**Upcoming meetings** [View Calendar](#)

- Board Meeting 27/03/20 11:00 am

**Recent Documents** [View All Documents](#)


Name	File Path	Updated
No data for table		

**Recent Publications** [View All Publications](#)

Name	File Path	Updated
User-Registration.pdf	00.09 NATA Portal Pu...	23/03/20
Life-Sciences-ISO-IEC-17025-Annex-Food-allergen-proteins-and-gluten.pdf	00.09 NATA Portal Pu...	18/03/20
word-test.docx	00.09 NATA Portal Pu...	18/03/20

**Content pages**

Quick view of all content with Shortcuts to content pages and documents

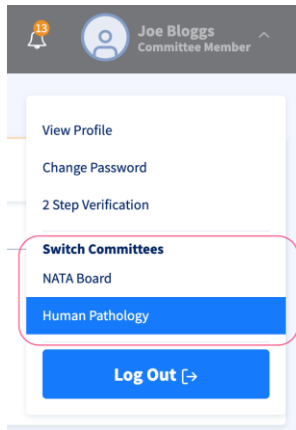
Note: All NATA Portal notifications will be visible at the top of the screen with the bell icon  that displays a number showing how many *Unread* notifications you have

If you are a member of multiple Committees, there is an option to switch the Committee you are actively viewing. Follow the below steps to switch Committees.

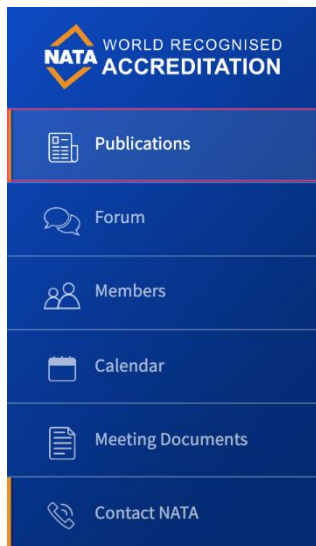
1. Click on your profile on the top right corner of the screen
2. Choose which Committee you wish to view as shown in the below image







3. A prompt will ask you to confirm the switch of Committees and the grey banner will be updated.



## 2. Publications

The NATA Portal allows all users to access NATA Publications and manage notification subscriptions.

To navigate to Publications, click on the left menu panel as shown below



You will land on the Publications page with a view of Recently Updated Publications

### Publications

Recently Updated Publications

Clear Filters

Name	Date Updated	Actions
<input type="text" value="Search"/>	<input type="text" value="Date"/>	
User-Registration.pdf	2020-03-22 21:45:52	<div> <div></div> <div></div> </div>
Life-Sciences-ISO-IEC-17025-Annex-Food-allergen-proteins-and-gluten.pdf	2020-03-18 01:42:17	<div> <div></div> <div></div> </div>

To preview a Publication, click on this icon . To Download a Publication, click on this icon 

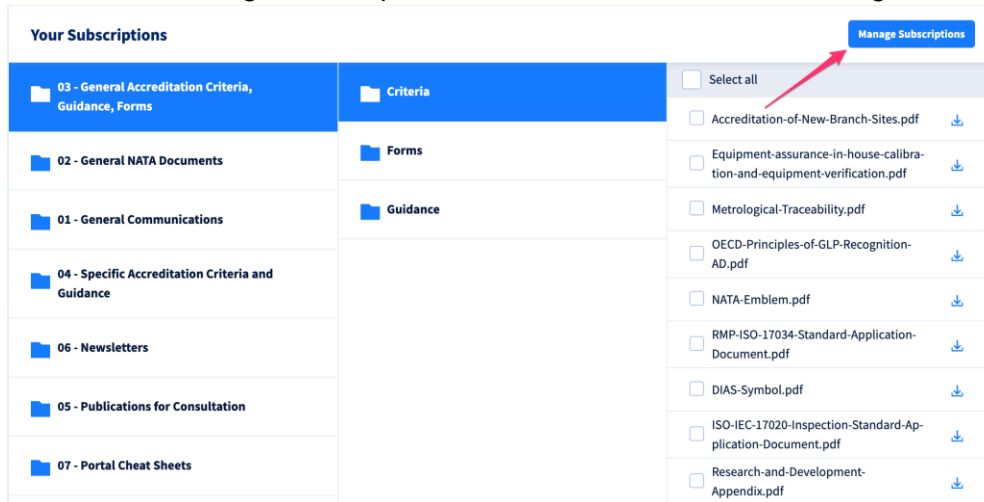
### Your Subscriptions - Subscribing and Unsubscribing



All Committee Members will have access to the full list of Publications. Your Subscriptions allows you to subscribe to publications for which you want to receive notifications.

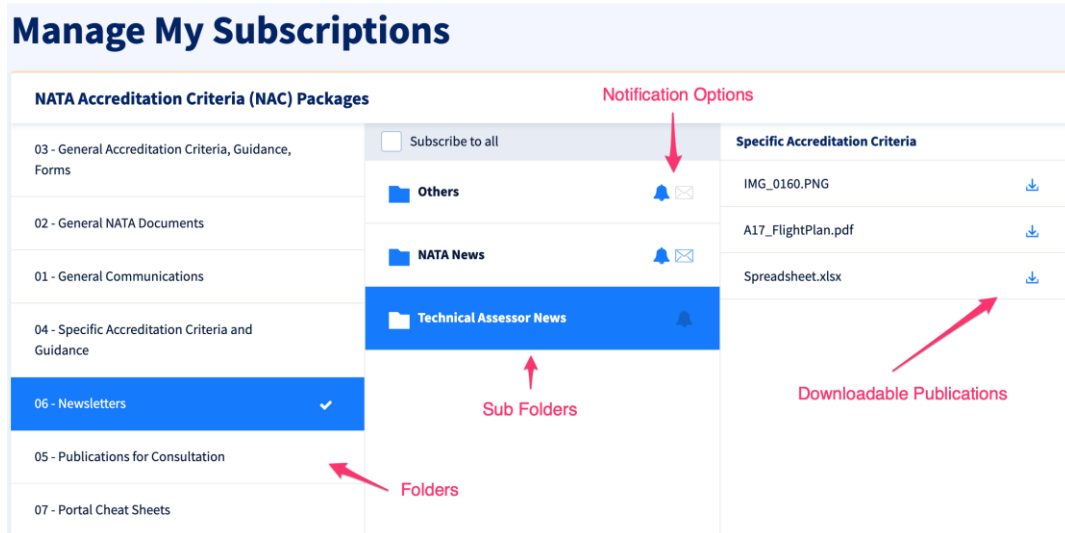
#### Manage Your Subscriptions

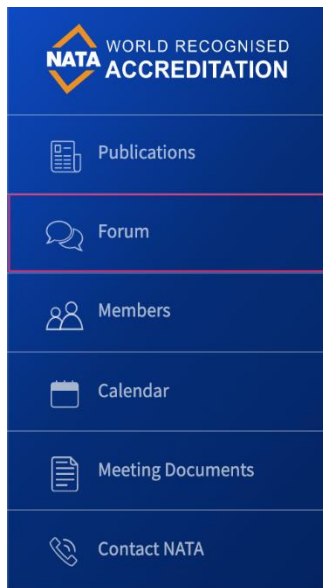
1. Scroll down to the Your Subscriptions section of the Publications page

2. Click on the Manage Subscriptions button located in the below image



3. View the Folders available. Navigate to the Folder to which you wish to Subscribe to notifications
4. Choose your Notification Options for Subfolders
- a. Select the bell icon  to receive Notifications within the NATA Portal
  - b. Select the Mail icon  to also receive Email notifications when Publications are uploaded in that sub folder





## 3. Forums

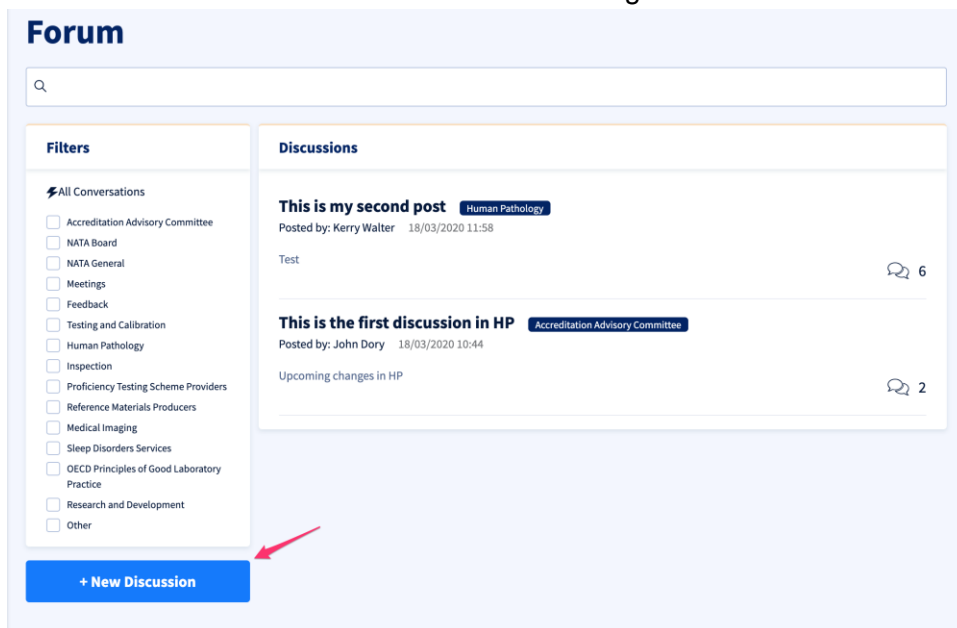
### Creating new Forum discussions

Each Committee has its own Forum platform for discussions. Discussions and replies can include attachments and hyperlinks. They can also be Filtered, Searched and Followed/Unfollowed for notifications.

Click on the Forum menu item to navigate to the Forum of your actively viewed Committee.

NOTE: A New Discussion can only be initiated by users with relevant administrative privileges. Once a Discussion has been initiated, anyone in the committee can add comments.

Click on [+ New Discussion](#) located in the below image



1. Give your Discussion a Title, Category and Description. Include formatting and attachments where relevant.

2. Click on Post

## Add New Discussion

### Add New Discussion

**Discussion Title**

**Category**

NATA Board

**Description**

**B** **I** **S** **Link** **Quote** **Code** **Bulleted List** **Numbered List** **Indent** **Outdent** **Attachment** **Undo** **Redo**

Hello NATA Board Members,

The purpose of this discussion is to create platform where all NATA Board members can give feedback on the issues discussed in the NATA Board meeting.

**Attachments**

**Post Discussion**

**Post** **Cancel**

Your Discussion will appear on the Forum page for your Committee. As soon as you post the discussion on the Forum page, all Committee members will be notified (through Notifications) about the new post. Members can *Filter* all Discussions by the selected Categories as seen below.

## Forum

**Filters**

⚡ All Conversations

☐ Accreditation Advisory Committee

☒ **NATA Board** **Discussion Filter**

☐ NATA General

☐ Meetings

☐ Feedback

☐ Testing and Calibration

☐ Human Pathology

**Discussions**

**NATA Board Meeting Feedback** **NATA Board**

Posted by: Joe Bloggs 24/03/2020 17:16

Hello NATA Board Members,


The purpose of this discussion is to create platform where all NATA Board members can give feedback on the issues discussed in the NATA Board meeting.

**Replies (Discussion Thread)** 0

## Replying to a Discussion



To reply to a Discussion follow the steps and images below.

1. Open up a discussion by clicking on the Discussion Title in the Forum page
2. Click the **Reply** button in the Forum page

3. Enter your discussion Reply as seen in the below image. Include formatting and attachments if required
4. Click the  button.














## Forum Discussion

### NATA Board Meeting Feedback



**Joe Bloggs** 24/03/2020 17:16  


Hello NATA Board Members,

The purpose of this discussion is to create platform where all NATA Board members can give feedback on the issues discussed in the NATA Board meeting.



Let's start with raising concerns on the discussed COVID-19 mitigation strategy

By default, Members who *Create* and *Reply* to Discussions are *Following* the Discussion and will receive NATA Portal Notifications  whenever members post replies on the Discussion.

Members can also download Discussion and Reply Attachments. All Attachments pertaining to that Discussion will show under *Related Documents* (shown in below image)



## Following and Un-following Discussions

To stop receiving notifications of the viewed discussion, click . To receive notifications of the viewed discussion, click .

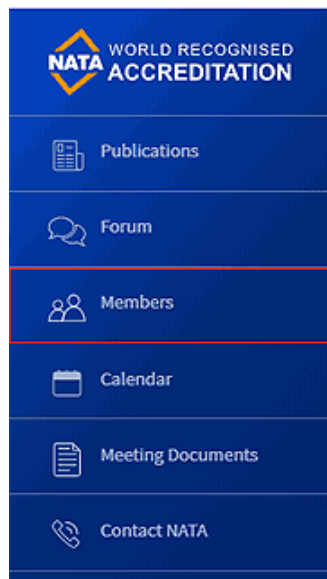
## Forum Discussion

The screenshot shows a forum discussion interface. At the top, the title "NATA Board Meeting Feedback" is displayed. To the right of the title is a link "Follow and Unfollow" with a red arrow pointing to it. Below the title, the first post is by "Joe Bloggs" on "24/03/2020 17:16". The post content is "Hello NATA Board Members, The purpose of this discussion is to create platform where all NATA Board members can give feedback on the issues discussed in the NATA Board meeting." To the right of the post are icons for deleting and editing. Below the first post is a second post by "Jon Smith" on "25/03/2020 11:24". The post content is "Let's start with raising concerns on the discussed COVID-19 mitigation strategy". Below the second post is an "Attachments" section with a link "COVID-19 Mitigation.docx" and a download icon. A red arrow points to this link with the label "Attachment". To the right of the discussion, there are two buttons: "Reply" (blue) and "Unfollow" (red). Below these buttons is a section titled "Related Documents" with a link "COVID-19 Mitigation.docx" and a download icon. A red arrow points to this link with the label "All Attachments".

## Editing and Deleting a Forum Discussion

To Remove a Discussion or Reply that you have created, click . To Edit a Discussion or Reply you have created, click .

NOTE: you can only delete a Discussion or Reply that was initiated by you. You cannot delete someone else's Discussion or Reply.



## 4. Members

### Accessing Members Details

Each Committee has a 'Members' page listing contact details of each of the Committee members registered for the Committee.

Click on the 'Members' tab from the left-hand side menu, the system will load all the members details on the right-hand side.

Dashboard > Members

## Members

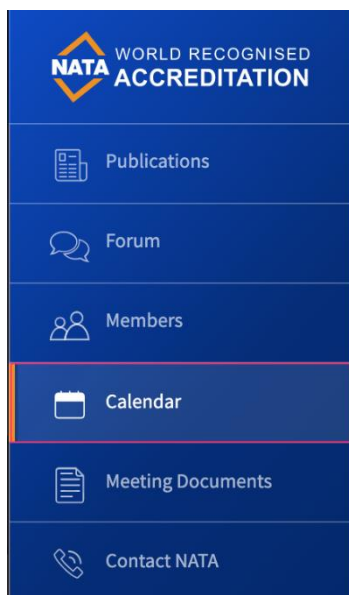
Committee Members

<b>John Dory</b> PROJECT MANAGER 📞 0405822075 ✉️ swetsee@gmail.com	<b>Kerry Walter</b> COMMITTEE TESTER 📞 0403455678 ✉️ swetsee@yahoo.com	<b>Paul Sioutas</b> INFRASTRUCTURE HEAD 📞 0234567867 ✉️ paul.sioutas@nata.com.au
<b>Sridhar Kanakaraj</b> CM 📞 0413007791 ✉️ tharumsei@gmail.com	<b>Thu-Anh Pham</b> STAKEHOLDER 📞 61484953817 ✉️ thu-anh.pham@nata.com.au	<b>Web Admin</b> WEBADMIN 📞 0406788978 ✉️ webadmin@nata.com.au

Every Committee member registered for the specific Committee will be listed here showing the following details:

- Name
- Position
- Phone Number
- Email Address





## 5. Calendar

The Calendar is a way for Members to View and Search for upcoming events in their Committee with a friendly and easy to use Calendar. Events can only be created by Committee administrators and they can be 'all day' events or an hourly range.

Click on the Calendar menu item to navigate to the Calendar of your actively viewed Committee.

Looking at the Calendar you will be able to:

- Navigate months and redirect to Today
- Switch views from Monthly and Weekly views
- View past and upcoming events

### Calendar

<

>

Today

← Date Navigation

March 2020

Month / Week View →

Month

Week

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Events

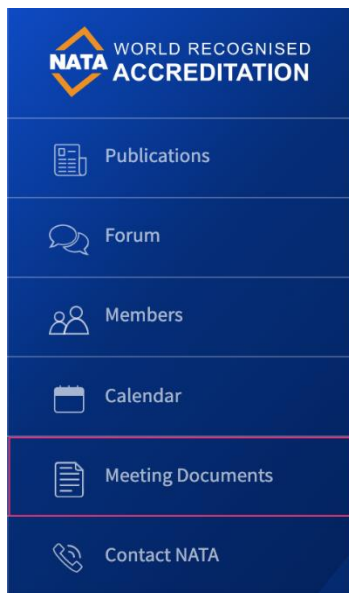
Annual Meeting 2020

Annual dinner 2020

Created on Laptop

Board Meeting

You will also receive a NATA Portal notification when an Event is created for your Committee



## 6. Meeting Documents

### Uploading and Navigating Meeting Documents

Meeting Documents provides a way for Committee Members to Upload, Download and Share meeting documentation related to their Committee. It provides a folder like structure and is simple to navigate. You can only see the folders you have been given access to by your Committee Administrator.

Click on the Meeting Documents menu item to navigate to the Meeting Documents of your actively viewed Committee.

Documents that have been recently uploaded will be listed in the Recently Updated Documents section of the Meeting Documents page.

Name	Date Updated	Actions
Meeting Agenda.docx	25/03/20	<a href="#">Download</a>
word-test(1).docx	18/03/20	<a href="#">Download</a>
word-test.docx	18/03/20	<a href="#">Download</a>
Spreadsheet.xlsx	18/03/20	<a href="#">Download</a>
Spreadsheet.xlsx	18/03/20	<a href="#">Download</a>

On the Meeting Documents page, you will have the ability to:

- Navigate meeting Folders and Sub folders you have access to
- Find documents in the Sub folders
- Upload documents
- Select and Download documents

See image below

Documents

Meeting Documents - March

March 10th

Meeting Documents - April

March 17th

Meeting Documents - May

March 24th

Meeting Documents - June

File Uploads

☐ Select all
 

Upload Document

☐ Meeting Agenda.docx
 

↓

☐ Meeting Outcomes.docx
 

↓

☐ Meeting Minutes.png
 

↓

Download Selected

Folders

Sub folders

File selection and Downloads

Please note once the document has been uploaded only forum admins have rights to delete it, if you need to remove a document that you have uploaded contact your Forum admin or email your request to [portalsupport@nata.com.au](mailto:portalsupport@nata.com.au)

## 7. Searching

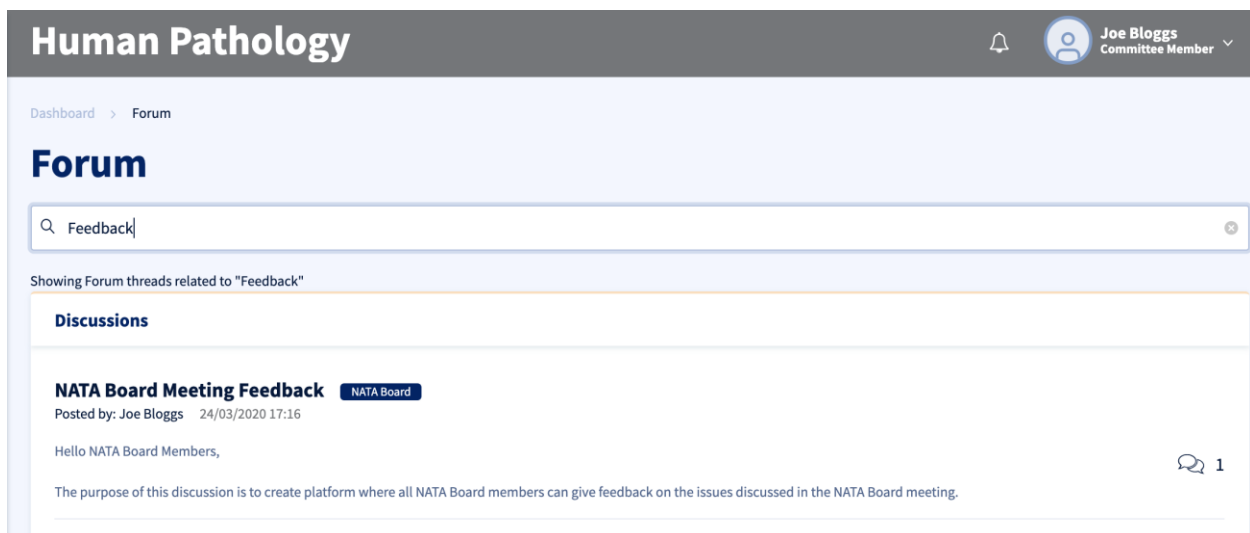
Each content page in the NATA Portal allows you to search content. To perform a search on any page, enter the keyword in the search box at the top of the page and press Enter on your keyboard.

Highlighted below are the different options you can use to perform a search on each page. The images demonstrate a view of how the results will be displayed once the search is performed.

### Forum Search

You can search Forum Discussions by:

- Discussion title
- Posted by (Member names)
- Discussion body



### Committee Search

You can search Committee Members by:

- Member name
- Member role
- Discussion description
- Contact number
- Email address

## Members

🔍 Eric

### Committee Members

**Eric Lo**  
**BUSINESS SERVICES**

📞 0404566504

✉ er.l@na.co.au

## Calendar Search

You can search Calendar Events by:

- Event name

You will find the date and time of the event as shown below

## Calendar

🔍 Board Meeting

Showing future meeting events related to "Board Meeting".

🕒 Board Meeting

27/03/20 11:00 am

## Meeting Documents Search

You can search Meeting Documents by:

- Document Title
- Content within the document given it is a text file (e.g. docx, pdf)

Dashboard > Meeting Documents

### Meeting Documents

🔍 Agenda

**Search Results**

[Clear Filters](#)

Name	Date Updated	Actions
<input type="text" value="Search"/>	<input type="text" value="Date"/>	
Meeting Agenda.docx	2020-03-25 02:43:59	<a href="#">Download</a>

Show 5  Page 1 / 1