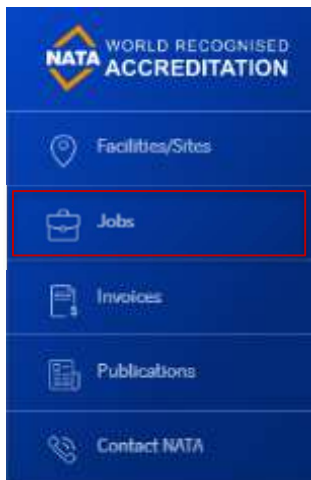# NATA Portal - Facility Reference Guide

Jobs

NATA Portal allows user to view list of all the jobs across all Facility/Sites they are registered for.
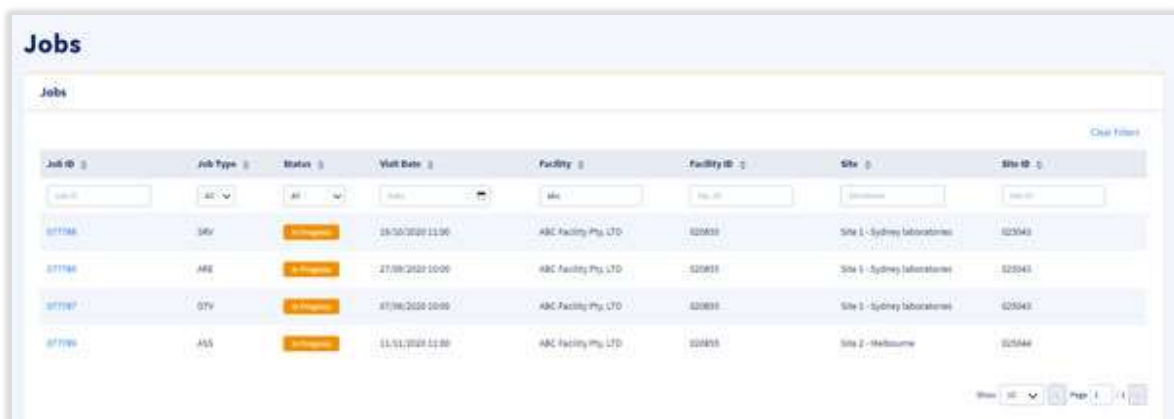
To view all the jobs, click on the 'Jobs' tab from the left-hand side menu. The system will take you to the Jobs page, listing all the Jobs across all the facility/Sites.

Every job listed on the page will show Job Id, job type, status, visit date, Facility name, Facility ID, Site name and Site id.

All the listed jobs can be searched, filtered and sorted by any of the listed fields.

Searching/Filtering Jobs

Jobs can be searched/filtered from across several pages listing jobs. Users can search jobs by entering a keyword in the search box or by selecting the desired value from the drop down if applicable.

To search/filter jobs by Job Id, enter the keyword in the search field just below heading 'Job Id' and system will show the desired result.

To search/filter jobs by Job Type, select the job type from the drop-down list just below heading 'Job Type' and the system will show you the desired results

To search/filter jobs by Job Status, select the status from the status drop down list just below heading 'Status' and the system will show the desired results

To search/filter jobs by the Visit date, enter the date value in the search field just below the heading 'Visit Date' and the system will show the desired results

To search/filter jobs by the Facility name, enter the keyword in the search field just below the heading 'Facility' and the system will show the desired results

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To search/filter jobs by the Facility id, enter the id in the search field just below the heading 'Facility ID' and the system will show the desired results

To search/filter jobs by the Site name, enter the keyword in the search field just below the heading 'Site' and the system will show the desired results

To search/filter jobs by the Site id, enter the id in the search field just below the heading 'Site ID' and the system will show the desired results

To clear filters after performing search operation, click on 'Clear Filters' to bring back the original display of the jobs page.

To sort jobs by any of the listed fields, click on the ⇕ icon next to the specific field and jobs will be sorted as desired.
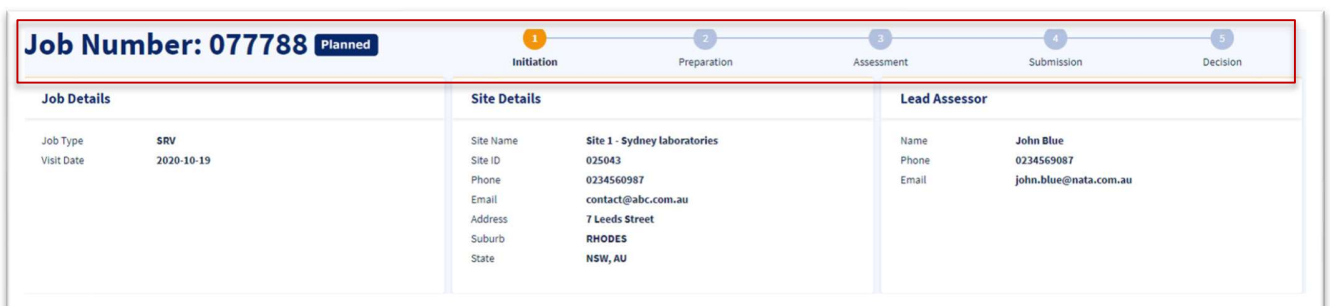
Accessing Job Details Page

User can access job details page directly by clicking on the job number. Jobs are listed on the on the Dashboard, sites page and on the Jobs page. Job details page can be accessed from any of these pages for the listed jobs.

Job details page display below listed information for that specific job;
- Job details
- Site details
- Lead Assessor details
- Received and submitted job documents

Job details, Site details and Lead Assessor details

Job details including job number, job type and job stage are listed on the top of the page. As the job progress the job status and job stage information will be changed on the job details page. Every job goes through 5 stages; Initiation, Preparation, Assessment, Submission and Decision, as the job progress through different stages the information will be reflected on the jobs page.

Site details including site name, site ID, phone, emails and address are displayed in its own panel just below the job stage information.

Lead Assessor details including lead assessor name, email and phone number are listed next to the site details panel below the job stage information.

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Received Job documents and Submitted Job documents

Every job will have received and submitted job document panels displayed on the job details page. User can switch between these two panels by just clicking on the panel heading. Active job document panel will be displayed with an orange underline as shown below;

Received Site Documents panel lists all the documents received from NATA, showing document name, description and date uploaded for every document listed.

Viewing and downloading documents

To preview a document, click on ⊙ icon

To Download a document, click on ⬇ icon

User can also download all or some of the selected documents by selecting the documents by ticking the checkbox on the left and clicking on the 'Download Selected' button. User can also select all the documents with one click using 'Select all' check box on the top.

Searching/filtering and sorting documents

To search a particular document enter the keyword in the document name search bar and as you entering the system will filter the documents for you. To search the documents by date uploaded.

Submitted Site Documents panel lists documents submitted by the user from the Portal. Every listing shows document name, description, date uploaded and uploaded by information.

Viewing and downloading documents

To preview a document, click on ⊙ icon

To Download a document, click on ⬇ icon

User can also download all or some of the selected documents by selecting the documents and clicking on the 'Download Selected' button.

### Searching/filtering and sorting documents

User also have ability to search/filter a particular document by entering the keyword in the document name, date uploaded and uploaded by search fields.

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Uploading Job documents

To upload a document, click on the '**Submitted Job Documents'** heading and:

- Click on the '**Upload Document**' button, a pop-up window for file upload will be shown.

- Click on Choose file and the system will load your file explorer; select the file you want to upload.

- The System will ask you to check and confirm the document selected is the right one if it is click on 'Yes' or click on 'No' and select the right document. Once you select 'Yes',

- The system will ask you to enter a small description (up to 299 characters), enter the description and click on 'Finish'.

- The system will perform a virus scan on the document and if no threats are found, it will list the document under **Submitted Site documents**.
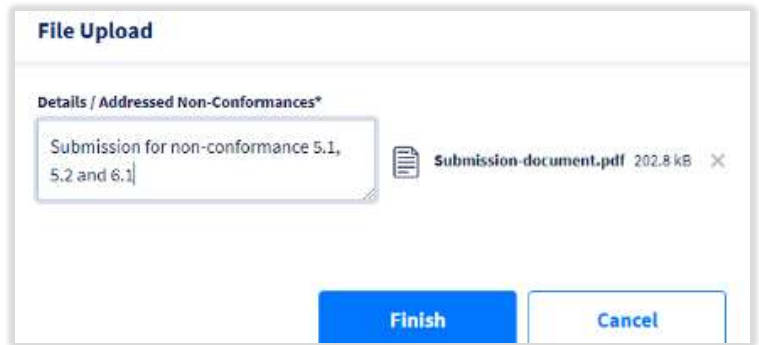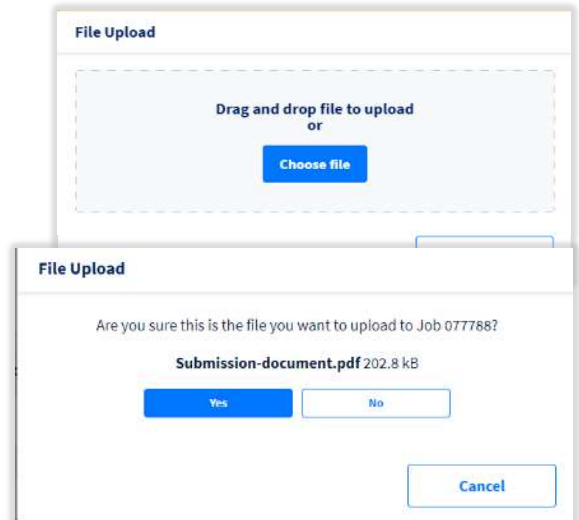
Please note once the file is submitted on the portal it cannot be removed by the user. To request a document be removed, contact your client coordinator or use the Contact NATA section of the portal or email portalsupport@nata.com.au.

To upload multiple files, zip them into 1 file and then upload. Users can upload a file size of maximum 150MB.