



**NATA Portal
Authorised Representatives
Reference Guide**

February 2024

[PUBLIC]

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 Client Coordinator or email portalsupport@nata.com.au

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



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1. Getting Started

Registration

NATA Portal is the preferred document and information exchange platform for our members. As part of on-boarding process, the Authorised Representative (AR) of the Facility will be registered on the NATA Portal. AR's can then request additional people to have access to the facility information on the NATA Portal by submitting the [Portal access form](#) for the additional user. Once the forms are completed and submitted to portalsupport@nata.com.au, the registration form will be processed after verification. Once the registration is approved, you will receive an email to set up a password for the NATA Portal login. Follow and complete the steps to set your password.

Please note: The initial welcome email link to set password will expire in 48hrs, after this you can directly visit <https://nataportal.nata.com.au/#/> and click on reset password to generate another activation link.

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.

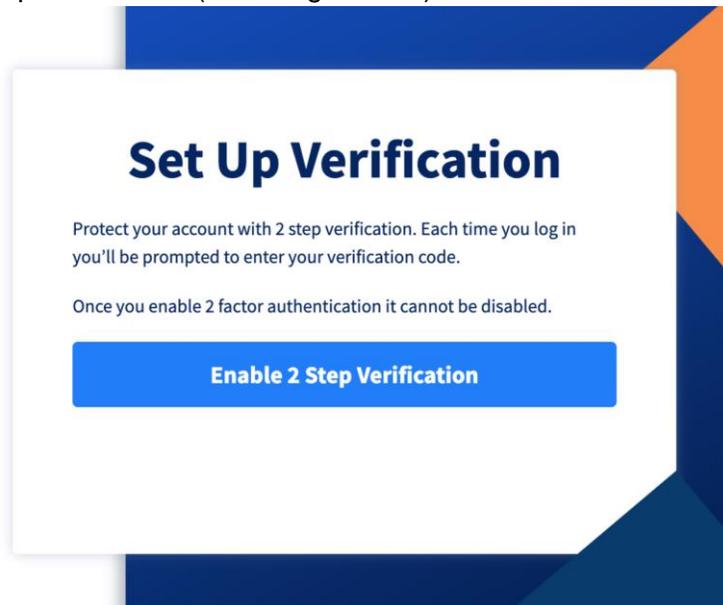
Please note that the steps of receiving and inputting a new verification code will need to be repeated when:

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

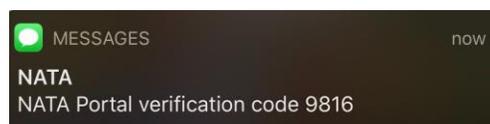
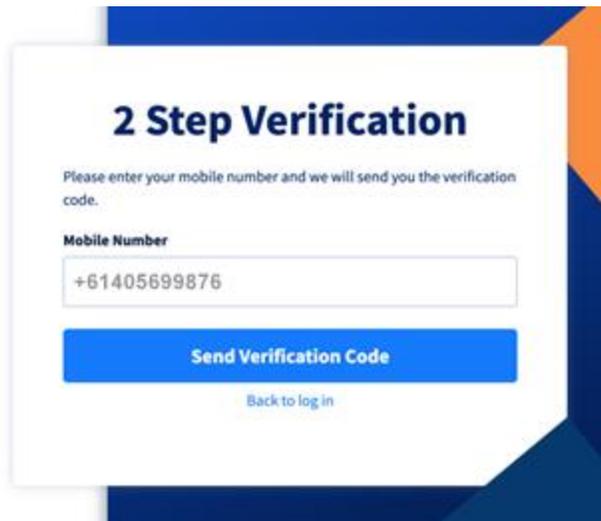
Steps

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 i.e. starting with country code +61 and no leading zeros +61405699876. 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
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Remember Me (Expires in 15 days)

Log In Securely

[Back to log in](#)

2. Dashboard and Profile

Once you are logged in to the Portal, you will be taken to the Dashboard view. Here you see the following 4 information panels showing latest updates from all their respective areas of the Portal.

Notifications Panel – This panel will list the latest 5 notifications for new uploaded site and job documents, latest publications, system notifications and any profile notifications. By clicking on the notification, you can directly access the relative information. As soon as you click on the notification it will disappear from the dashboard but it will also be listed on the Notifications page. You can clear all the dashboard notifications by clicking on 'Clear all'. To view all the notifications, click on 'View Notifications' where all the notifications you received will be listed unless you delete them.

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

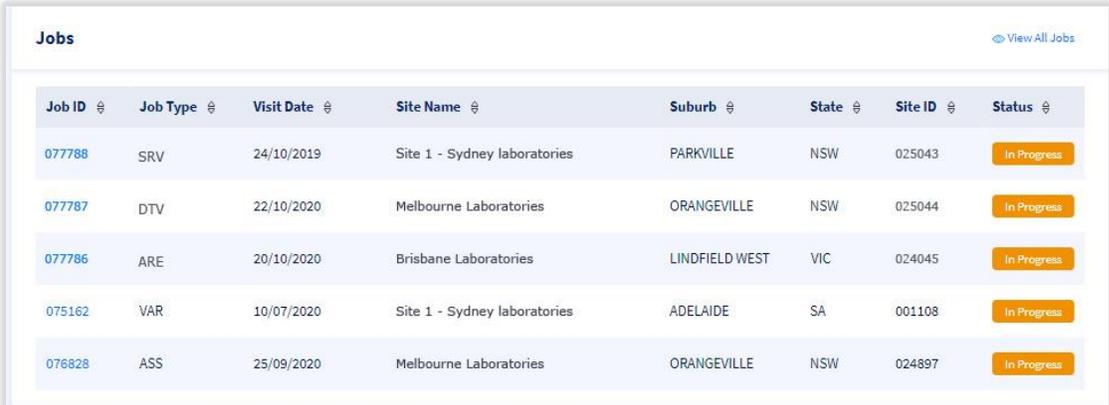


Notifications [View Notifications](#)

- AR-New-Client-Enquiries.doc received for 077746
- New Publication: 02-00-New-Client-Enquiries.doc
- Profile Changes has been Approved
- New Job Document received
- New Publication: dr-warish-ahmed.png

[Clear all](#)

Jobs Panel – This panel will list 5 latest jobs from across all the Facility/sites you are registered for. For every job you can see Job Number, Job Type, Visit Date, Site name, suburb, state, Site ID and job Status information. You can also click on the job number and directly access that specific job information from the Dashboard. You can also click on 'View All Jobs' to view all the jobs for your facility/Sites.



Jobs [View All Jobs](#)

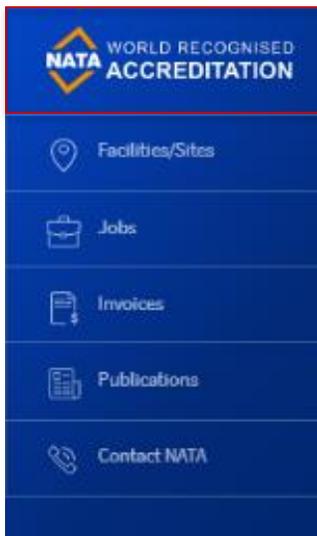
Job ID	Job Type	Visit Date	Site Name	Suburb	State	Site ID	Status
077788	SRV	24/10/2019	Site 1 - Sydney laboratories	PARKVILLE	NSW	025043	In Progress
077787	DTV	22/10/2020	Melbourne Laboratories	ORANGEVILLE	NSW	025044	In Progress
077786	ARE	20/10/2020	Brisbane Laboratories	LINDFIELD WEST	VIC	024045	In Progress
075162	VAR	10/07/2020	Site 1 - Sydney laboratories	ADELAIDE	SA	001108	In Progress
076828	ASS	25/09/2020	Melbourne Laboratories	ORANGEVILLE	NSW	024897	In Progress

Invoices to be paid panel – This panel will list any latest invoices that are due to be paid. Every listing will show the Invoice ID, Invoice Type, due by date and the amount due.

Invoices to be paid View All Invoices			
Invoice ID	Invoice Type	Due By	Amount
PRO300742		13/10/2020 11:00	\$1046.48
CRD7853		19/10/2020 11:00	\$-2001.08

Recent Publications panel – This panel list the top 5 updated publications by NATA. Every listing will show the name of the Publication, its file path and date it got updated. You can click on the eye icon to quickly view the publication. You can also click on ‘View all Publications’ link and access the ‘Publications’ area of the portal.

Recent Publications View All Publications			
Name	File Path	Updated	
Test doc2.docx	Portal Cheat Sheets/Technical Assessor/	27/10/20	
dr-warish-ahmed.png	Newsletters/NATA News/	20/10/20	
03-02-19-Office-Coordinator.pdf	Publications for Consultation/Meeting Ag...	19/10/20	
Animal-Health-ISO-IEC-17025-Appendix.zip	Publications for Consultation/Applicatio...	16/10/20	

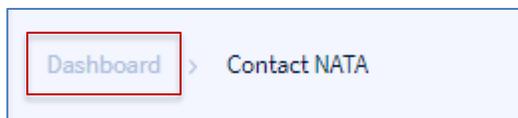


Accessing Dashboard from other pages

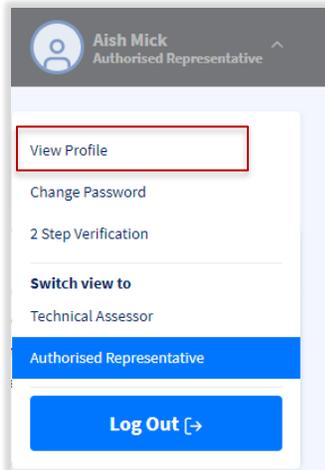
If you want to go back to Dashboard from any other pages on the Portal, click on the ‘NATA World Recognised Accreditation’ logo on the left-hand top corner

Or

Click on the ‘Dashboard’ link from the breadcrumb menu on the page, displayed just above the page Title.



Editing Profile Information



To edit your profile information, follow the below steps:

Once you have logged in to the NATA Portal, click on your profile name at the top right corner of your screen.

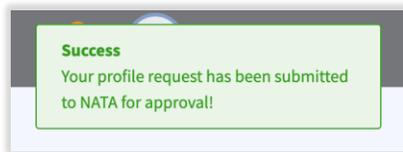
A dropdown as shown on the left will appear, click on View Profile.

You will then be directed to your Profile Page. Click [Edit Profile](#)

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

A screenshot of the 'Edit Profile' form. The form is divided into two main sections: 'Details' and 'Address and Billing Details'. The 'Details' section includes fields for 'First Name*' (Aish), 'Last Name*' (Mick), 'Email Address*' (aish.mick@hotmail.com), and 'Phone*' (0234560987). The 'Address and Billing Details' section includes fields for 'Address*' (7 Leeds Street, Pemulwuy), 'Billing Address' (7 Leeds Street, Pemulwuy), 'Country' (Australia), 'State' (NSW), 'Suburb' (Rhodes), and 'Post Code' (2138). At the top right of the form are buttons for 'Change Password' and 'Save Changes'. A 'Cancel' link is located at the bottom left.

Click on [Save Changes](#) once complete. You will be directed back to your Profile Page and will receive the alert shown below.

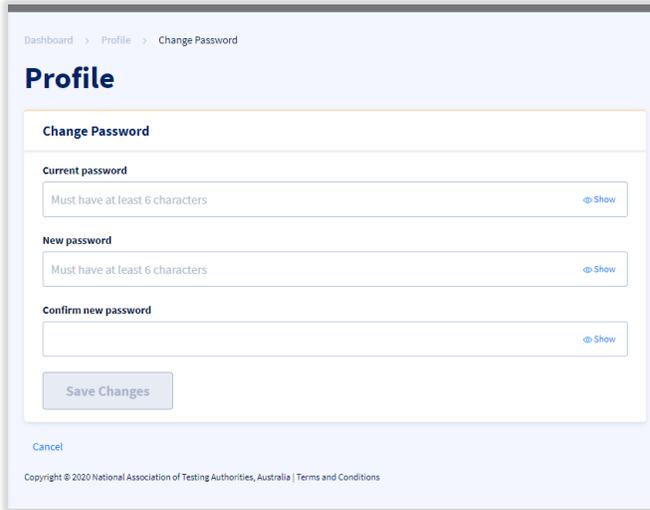


Please note: Your changes will not be reflected immediately. They are subject to approval by the NATA Portal System Administrator. Only once approved, they will reflect on your profile.

Change Password

To change your password once you are logged in, click on the 'Change Password' option from the drop-down profile menu as highlighted in the below image.

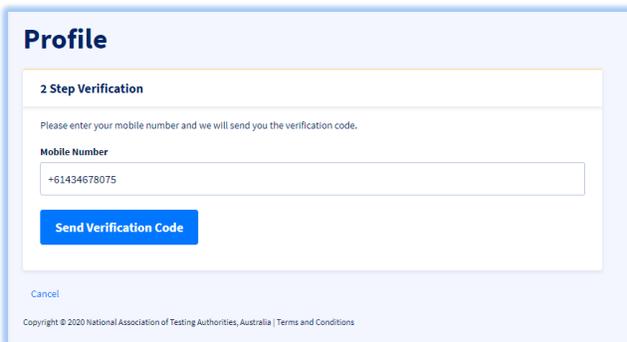
The system will load up the below screen where you will have to enter the current password, new password and save changes. Once the changes are saved, you can start using the changed password for logging in to the Portal.



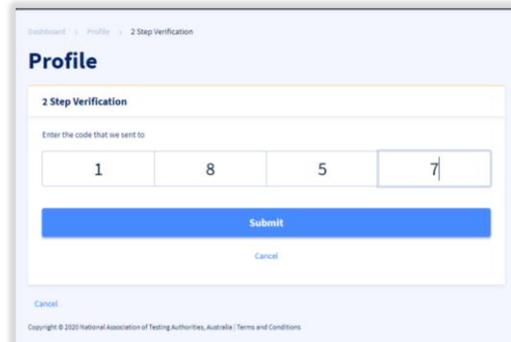
The screenshot shows the 'Change Password' form within the 'Profile' section. The form includes three input fields: 'Current password', 'New password', and 'Confirm new password'. Each field has a 'Show' icon to toggle visibility. Below the fields is a 'Save Changes' button and a 'Cancel' link. The footer contains the copyright notice: 'Copyright © 2020 National Association of Testing Authorities, Australia | Terms and Conditions'.

2 Step Verification

If your mobile number gets changed, you can update your mobile number for the 2-step verification process from your profile. Click on the '2 Step Verification' from the profile drop down menu and the system will load the screen as shown below. Enter the new mobile number prefix with +61 and click on 'Send Verification Code'. The system will send a code to you new mobile, enter the code and submit. The mobile number will be updated for 2 step notification on your profile.

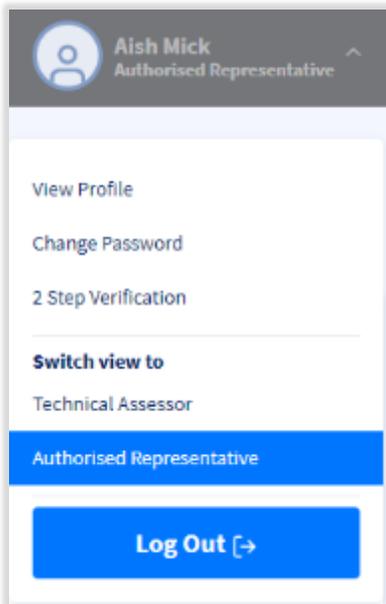


The screenshot shows the '2 Step Verification' form. It prompts the user to enter their mobile number and provides a 'Send Verification Code' button. The mobile number field contains '+61434678075'. A 'Cancel' link and the copyright notice are visible at the bottom.



The screenshot shows the '2 Step Verification' form with the code input field. The code '1857' is entered in the input boxes. A 'Submit' button and a 'Cancel' link are visible. The copyright notice is at the bottom.

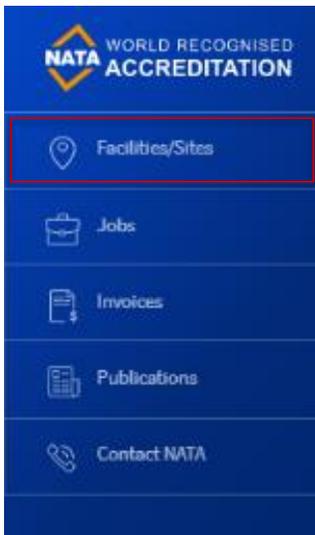
Switching Roles



The portal caters for different types of users. If you are eligible for one of the other user types, you might be able to have more roles on the Portal. You can easily switch profile between these roles with just one click without logging off from the Portal.

To switch profile and view the data related to other profile, click on your profile name on the right corner of the screen. A profile drop-down menu will appear as shown on the left, if you are registered for more than 1 role you will see the 'switch view to' section and roles listed in there. The profile you are currently viewing will be highlighted in Blue. Click on the role you want to switch to, the system will ask you to confirm if you really want to switch your view, click 'OK' and the system will show you data relevant to your selected role.

3. Facilities/Sites



NATA Portal allows user to view list of all Facilities/Sites they are registered for on one page. Click on the 'Facilities/Sites' on the left-hand side menu.

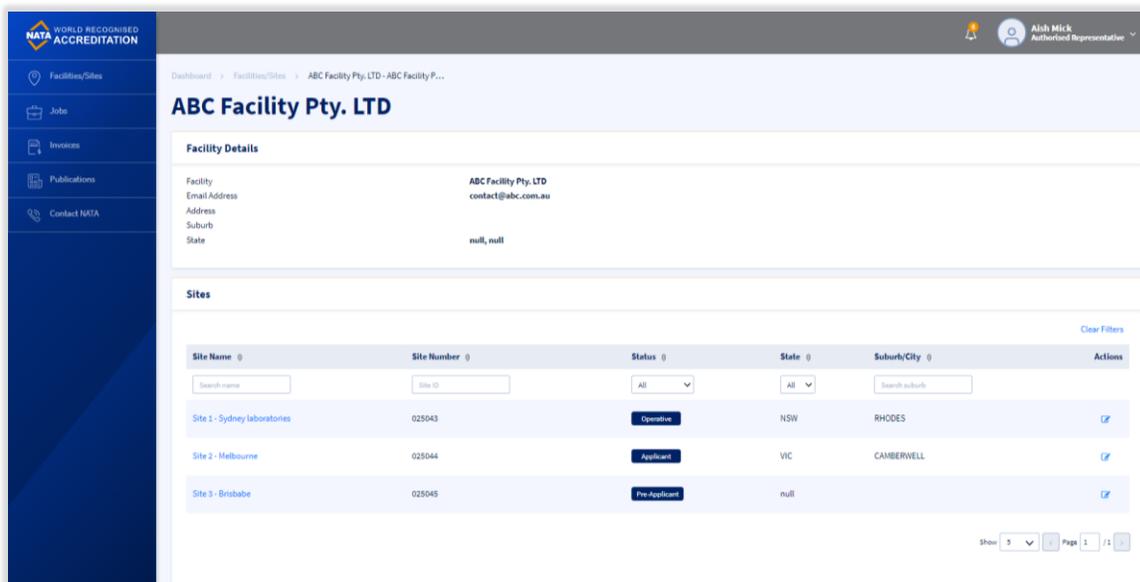
The system will take you to the Facilities/Sites page where all the facilities and sites you are registered for will be listed. By default, you will be shown only 5 entries but if you wish to see more entries then you can do that by selecting a different value from the 'Show' drop down menu in the Navigation pane.

Every facility/Site listing will show Facility name, Facility number, Site Name, Site Number, Status, State and Suburb/City information. User can directly access the Facility/Site page by clicking on their respective names.

Facility Page

Facility page can be accessed by clicking on the facility name listed on the Facilities/Sites landing page. Facility page display 2 panels Facility details and Sites. Facility Details will list Facility name, email and address. Sites panel will display all the sites you have access to from that specific Facility. Every site listed will show Site Name, Site number, Status, State and Suburb/City information.

You can also search and filter the listed sites using any of the fields. Just type the keyword in the relative search box or select the value if it is a drop down and the system should show you the desired results. All the listings can also be sorted by any of its listed fields.



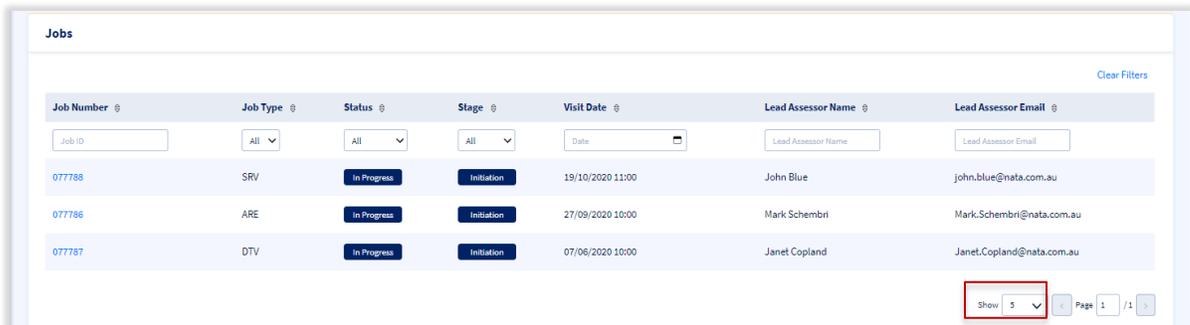
Site Page

Site page can be accessed by clicking on the site name listed on the Facilities/Sites landing page. Site page displays the following 6 information panels showing relative information;

1. **Site Details** panel displays Facility name and number, Site name, site number and Status
2. **Contact Details** panel displays Phone, email and address information
3. **Accreditation Specialist** panel displays name, phone and email address of the CC.



4. **Jobs** panel lists all the jobs for that specific site listing job number, job type, status, stage, visit date, Lead Assessor name and email information for every job entry.



To see more jobs listed, select the other value from the 'Show' drop down in the navigation panel and the system will show you the desired results provided there are entries to show. You can also navigate between the pages using the navigation pane. More job details can be accessed by clicking on the specific Job number.

5. **Received Site Documents** panel lists all the documents received from NATA. User can see document name, description and date uploaded information 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 and clicking on the 'Download Selected' button.

Searching/filtering and sorting documents

To search a particular document enter the keyword in the document name search bar and

as you enter the system will filter the documents for you. To search the documents by date uploaded.

6. **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.

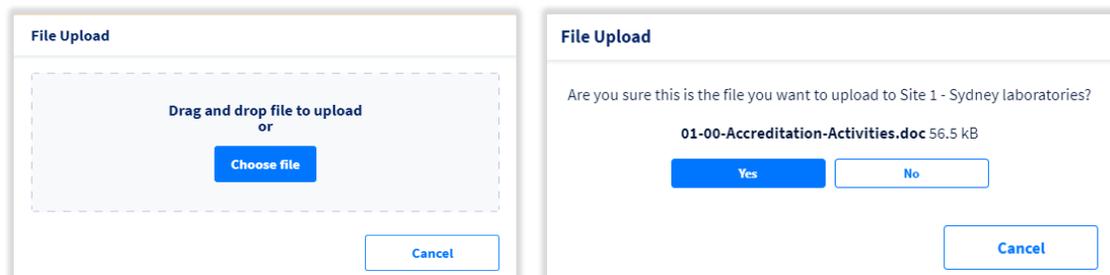
Searching/filtering and sorting documents

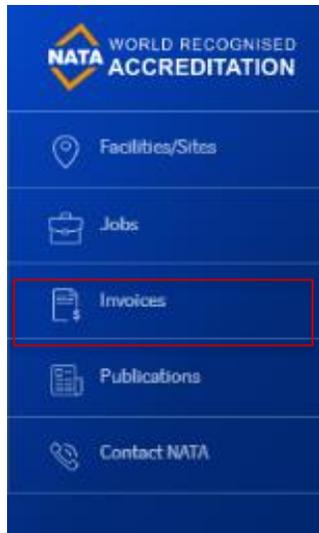
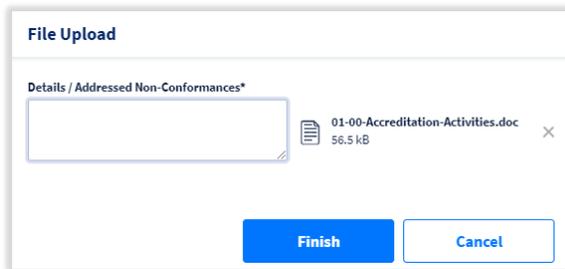
User also has ability to search/filter a particular document by entering the keyword in the document name, date uploaded and uploaded by search fields.

Uploading Site documents

To upload a document on the site page, scroll down to the documents section and click on the 'Submit Site documents' panel. Now 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. (Note: Special characters (!@#\$%^&* _+ /) must not be used in filenames. Multiple files are best uploaded as a zipped file folder.) 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', 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 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, only NATA staff have access to delete the submitted document.

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





3. 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.

Job ID	Job Type	Status	Visit Date	Facility	Facility ID	Site	Site ID
077186	SRV	In Progress	19/03/2020 11:00	ABC Facility Pty LTD	020855	Site 1 - Sydney laboratories	020443
077186	ARE	In Progress	27/06/2020 10:00	ABC Facility Pty LTD	020855	Site 1 - Sydney laboratories	020443
077187	STV	In Progress	07/06/2020 10:00	ABC Facility Pty LTD	020855	Site 1 - Sydney laboratories	020443
077189	ASS	In Progress	11/11/2020 11:00	ABC Facility Pty LTD	020855	Site 2 - Melbourne	020444

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

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.

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 Number: 077788 Planned		1 Initiation		2 Preparation		3 Assessment		4 Submission		5 Decision	
Job Details				Site Details				Lead Assessor			
Job Type	SRV	Site Name	Site 1 - Sydney laboratories	Name	John Blue	Site ID	025043	Phone	0234569087	Visit Date	2020-10-19
Visit Date	2020-10-19	Phone	0234569087	Email	john.blue@nata.com.au	Email	contact@abc.com.au				
				Address	7 Leeds Street						
				Suburb	RHODES						
				State	NSW, AU						

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 id and phone number are listed next to the site details panel below the job stage information.

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 Job Documents		Submitted Job Documents			
<input type="checkbox"/> Select all	<input type="text" value="Enter Document Name"/>	<input type="text" value="Date"/>	<input type="text" value="Name"/>	<input type="text" value="Date"/>	<input type="text" value="Name"/>
<input type="checkbox"/>	Submission-document.pdf	Submission for non-conformance 5.1, 5.2 and 6.1	29/10/2020 11:50	Aish Mick	View Download
<input type="checkbox"/>	Evidence-document.docx	This is evidence against clause 4.1, 4.2 and 4.3	29/10/2020 11:50	Aish Mick	View Download

[Upload Document](#)

Show 5 Page 1 / 1

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 enter 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.

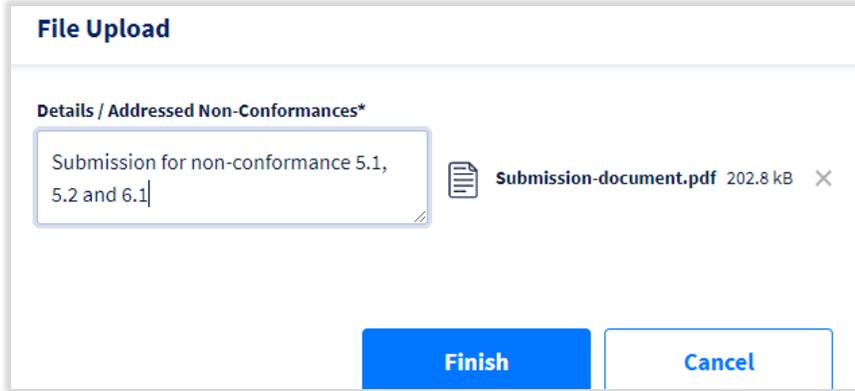
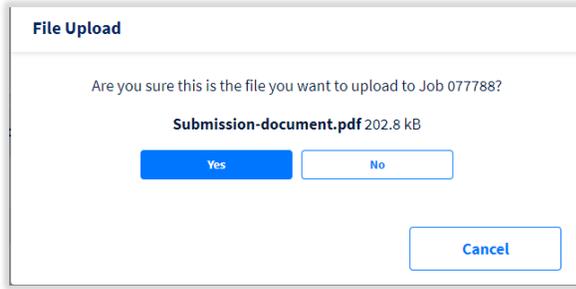
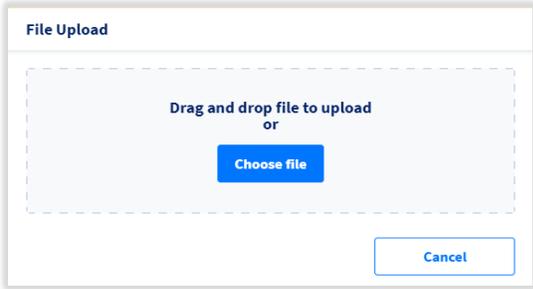
Uploading Job documents

User can submit job related documents in the 'Submitted Job Documents' panel. Click on the heading 'Submitted Job Documents' to view the uploaded document and the upload button.

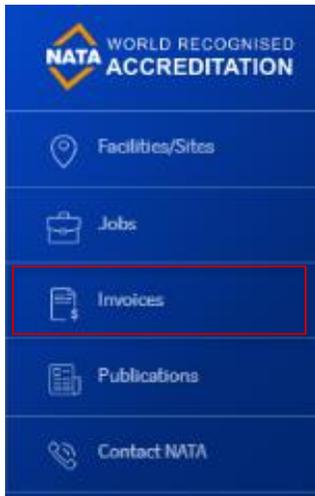
To upload a document', click on the 'Upload Document' button, a pop-up window for file upload will be shown. Click on Choose file and the system will load your file explorer; select the file you want to upload. (Note: Special characters (!@#\$%^&* _+ /) must not be used in filenames. Multiple files are best uploaded as a zipped file folder.) The system will ask you to check and confirm the document selected is the right one if it is then click on 'Yes' or click on 'No' and select the right document. Once you select 'Yes', 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, only NATA staff have access to delete the submitted document.

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



4. Invoices



Users can view outstanding invoices information from across all the facilities/sites they are registered for on the NATA Portal.

To access invoices, click on the 'Invoices' tab from the left hand side menu and the system will load the 'Invoices' page for you listing any outstanding invoices from across all the facilities and sites you are registered for.

Every invoice listing will list the Invoice ID, Invoice type, due by date, Facility Name, Job number (if applicable) and Amount due.

Invoices can be searched/filtered by Invoice Id, Invoice Type, due by date, job number (if applicable) and amount due by entering the relevant keyword in the search boxes listed under the respective headings.

Invoices can also be sorted by ascending or descending order by any of the listed fields. To sort by a particular field, click on the sort  icon next to that respective field heading and the system will sort the entries for you.

Dashboard > Invoices

Invoices

Outstanding Invoices Clear Filters

Invoice ID	Invoice Type	Due By	Facility Name	Job Number	Amount Due
<input type="text" value="Invoice ID"/>	<input type="text" value="All"/>	<input type="text" value="Select"/>		<input type="text" value="Job Number"/>	<input type="text" value="Amount Due"/>
PRO300742	Prorata Invoice	13/10/2020	Site 1 - Sydney laboratories		\$1046.48
TAW706847	Time @ Work Invoice	28/10/2020	Melbourne Laboratories	076871	\$6531.54
TAW706734	Time @ Work Invoice	28/10/2020	Brisbane Laboratories	075809	\$554.40
CRD7853	Credit Invoice	19/10/2020	Site 1 - Sydney laboratories		\$-2001.08
TAW706715	Time @ Work Invoice	28/10/2020	Melbourne Laboratories	Multiple	\$831.60

Show 5 Page 1 / 1

5. Publications



NATA Portal allows all users to access NATA Publications and manage notifications for subscriptions.

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

You will land on the Publications page with a view of 5 Recently Updated Publications, followed by the list of all the publications folders and subfolders listing the documents.

To preview a Publication, click on this icon 

To Download a Publication, click on this icon 

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	
Life-Sciences-ISO-IEC-17025-Annex-Food-allergen-proteins-and-gluten.pdf	2020-03-18 01:42:17	

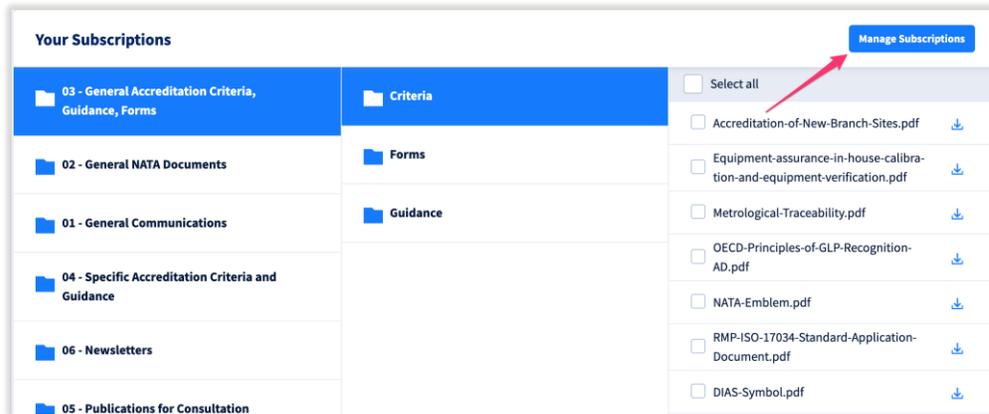
User can control how many entries they want to see in the recently updated Publications panel and can easily change the number by selecting from the show drop down. User can also navigate between the different pages using the navigation pane.

Your Subscriptions - Subscribing and Unsubscribing

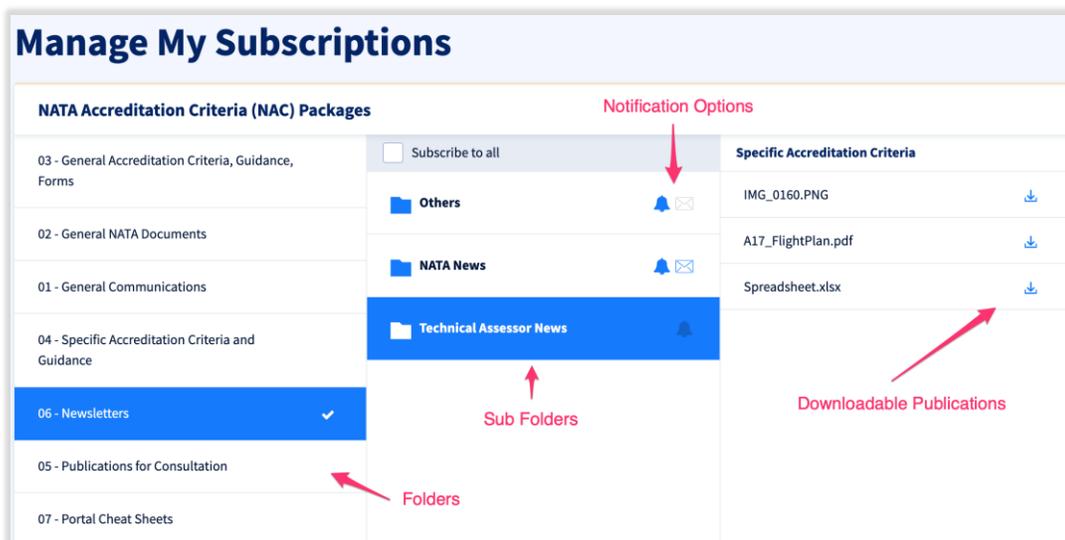
All users will have access to the full list of Publications. Your Subscriptions allows you to subscribe to publication folders for which you want to receive email and/or dashboard notifications whenever the document is updated under that folder.

To manage your Subscriptions for notifications;

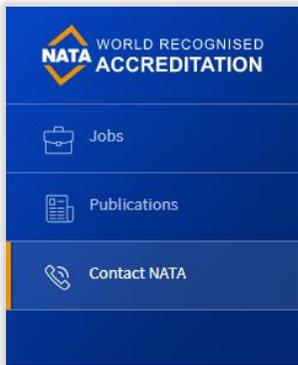
1. Scroll down to the Your Subscriptions section of the Publications page
2. Click on the 'Manage Subscriptions' button located in the below image



3. View the Folders available. Navigate to the Folder to which you wish to Subscribe to receive notifications when a document in that folder is updated on the Portal.
4. Choose your Notification Options for Subfolders;
 - a. Select the bell icon  to receive a dashboard notification, similarly deselect to stop notifications
 - b. Select the Mail icon  to also receive email notifications on your registered email when Publications are uploaded in that sub folder, similarly deselect to stop email notifications.



6. Contact NATA



Portal users also have access to 'Contact NATA' form on the portal to submit any query from the NATA Portal. To access this page click on the 'Contact NATA' link on the left hand side menu.

The system will take you to the Contact NATA page showing the form. Enter subject and a brief description about your query in the 'What is your message about' data field and submit. Your query will be submitted to NATA and a confirmation for the same will be displayed on the screen.

General contact information including free call phone number, email, address and NATA website address is also listed on the right-hand side of the page. You can email directly to portalsupport@nata.com.au if you have any questions.