

2020

# SAFETECH *Synergy*

Elevating **QHSE** with Industry Best **Technology!**  
Presented by ITRAK

Wednesday May 27 @ 2:30PM (MST)

“Our New Data Transfer Tool:  
Moving ITRAK Process Flows &  
Data”



*ISV Connect Premier Tier Partner*

ITRAK  
365



[www.useitrak.com](http://www.useitrak.com)

# HOUSEKEEPING ITEMS

- Please mute yourselves
- If there aren't a lot of people, we'll take questions openly throughout the presentation
- Otherwise, feel free to ask question in the Chat panel or click the 'Raise hand' icon
- You can also join our Microsoft Teams Conference Channel and continue the conversation there (Ask Us How?)
- Instructions: <https://itrak365.com/conference-schedule/>
- If you have question after the conference, see above or you can just email them to us via [support@neosystems.com](mailto:support@neosystems.com)
- We can provide copies of the video and any presentation materials, just ask
- Check out our YouTube and LinkedIn pages as well
- Make sure to look at the Schedule for other sessions
- This session is recommended for technical audience (T300)

# INTRODUCTIONS

<https://itrak365.com/about-us/#the-team>



Geoffrey Shaw  
**Software Developer**

- 7 Years with ITRAK !
- Chairman of SAIT ITSD Advisory Committee
- MCP (Microsoft Certified Professional)



Shilpa Seenappa  
**Project Lead Consultant**

- 6 Years with ITRAK !
- 11 Years of Project related leadership and consulting
- 10 years of managing a complete lifecycle of ERP implementation

# AGENDA



## TECHNOLOGY

XRM Toolbox Overview

Data Transporter Overview

Demo



## BUSINESS

Benefits/Costs

Organization Feasibility

Use Cases

Q&A

# XRM TOOLBOX OVERVIEW



Community-Driven Tool for the CDS Platform



Designed for Administrators and Professionals



Recognized value within the Dynamics community

# DATA TRANSPORTER OVERVIEW

Open-sourced  
Community  
Plugin

Free to own

Easy to  
acquire

Updated  
regularly

Designed for all  
Data (not just  
ITRAK!)

Custom  
solution data

CRM OOB  
Entities

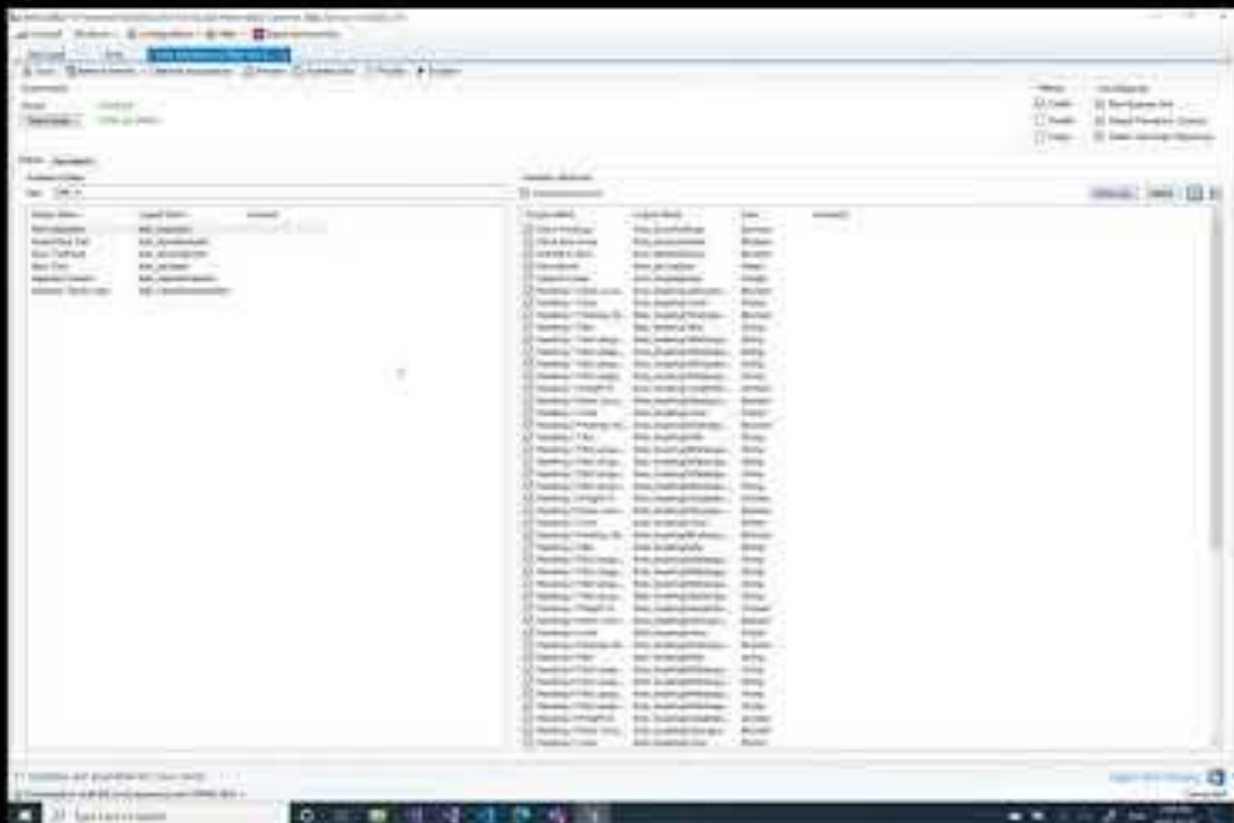
Quality of Life  
Features

Mapping

Filtering

Playlists

DEMO  
DATA TRANSPORTER IN ACTION





# BENEFITS

- Saves Time!!
  - Supports N:N relationships
  - Simplified migration process saves me hours of work
- Multiple-Use
  - Can be used to transfer any data records in dynamics 365 not just forms!
- Multi-Operation
  - Can be used to update/delete/create records
- Functional improvements over the original Form Type Transfer Tool

## What are the costs?

XrmToolBox is a FREE tool!!

How can I get my hands on this?

Can I see this for myself?



Are there environmental limits to this tool?



What's the next steps if I want to implement this at my company?



# SAFETECH Synergy Schedule! Upcoming Sessions!

- <https://neosystems.com/conference-schedule/>



2020

# SAFETECH

## Synergy

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