

2020
SAFETECH
Synergy

Elevating **QHSE** with Industry Best **Technology!**
Presented by I T R A K

Wednesday May 27 1:00pm (MST)

ITRAK 365 Technical Enhancements in 2020

ISV Connect Premier Tier Partner

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3 6 5



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Introductions



Tian Specht
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Product Development & Innovation

Agenda

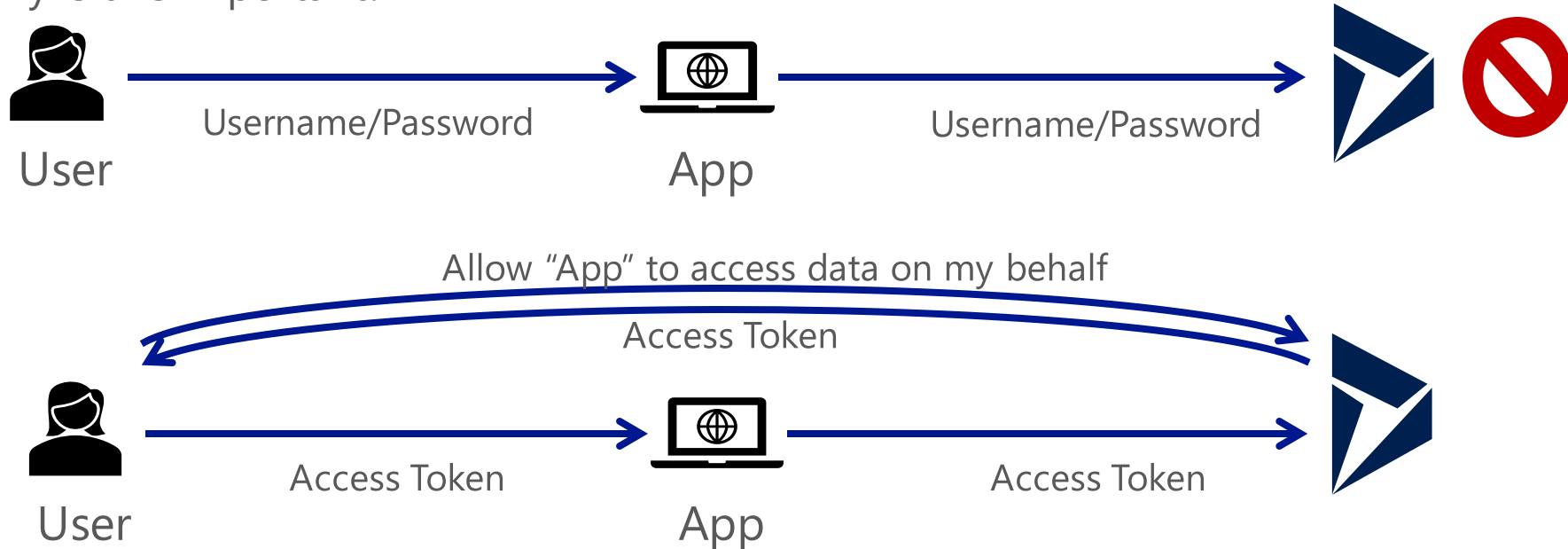
This session will cover a high-level overview of new ITRAK 365 technical enhancements. In depth details on many of these enhancements will be available in upcoming sessions.

- Modern Authentication
 - OAuth2
 - MFA (Multi-factor authentication)
 - SSO (Single Sign-on)
- ITRAK External User Forms
- ITRAK Portal New Activities Area
- ITRAK Microsoft Teams Integration
- Other ITRAK Enhancements
- New Mobile App
- ITRAK API

OAuth 2.0 Authentication

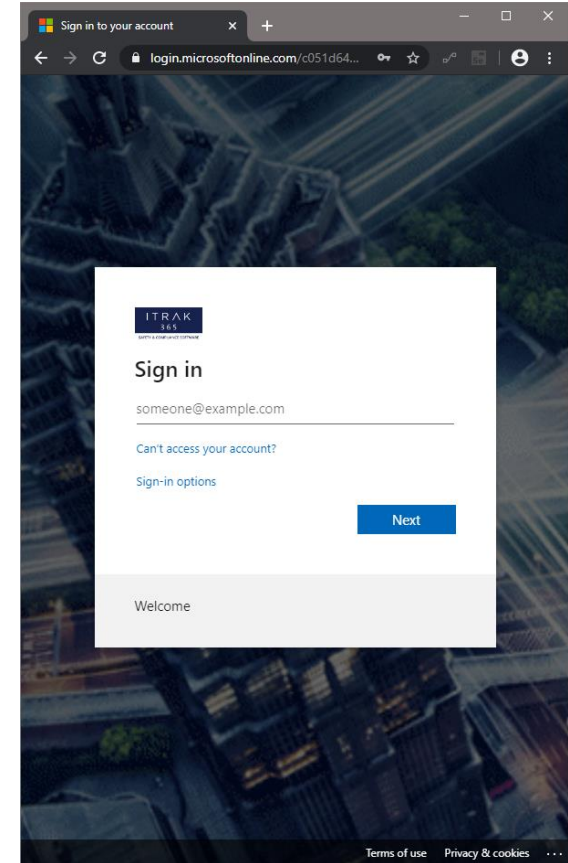
- What is OAuth2 - it is an industry-standard authorization framework
- Supported in ITRAK 4.15+

Why is this important?



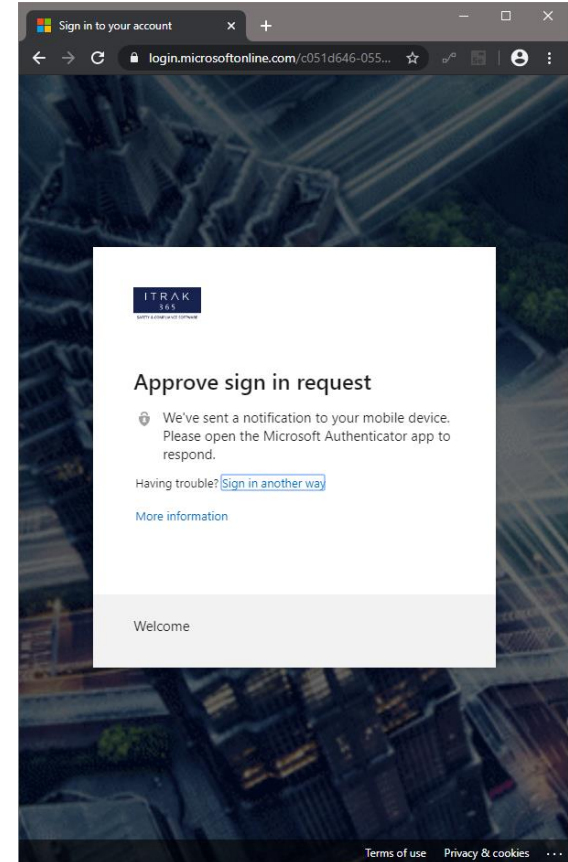
OAuth 2.0 Authentication

- Enables applications to delegate user authentication to the service that hosts the user account
- ITRAK authenticates against accounts hosted on the Azure Active Directory (AzureAD) service
- Authorization Code Flow – most secure flow as access tokens flow between the web server and authentication provider without going to the web browser
- Allows longer lived ITRAK sessions (currently 4 days) without compromising security
- If your session expires in the middle of entering a large form, you can reauthenticate in a new window without losing your data



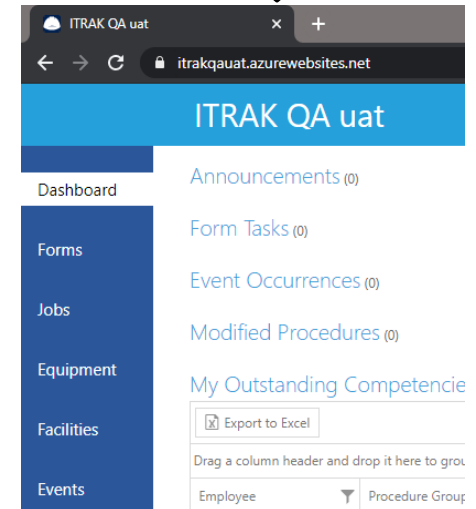
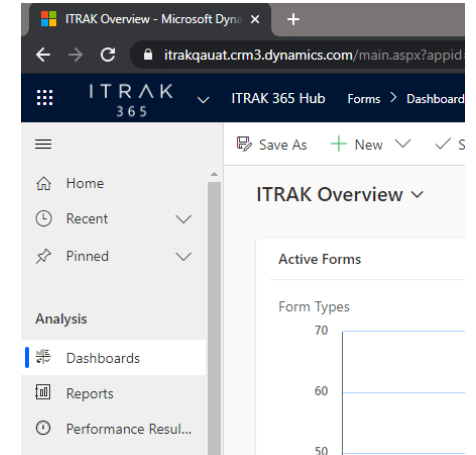
Multi-Factor Authentication (MFA/2FA)

- Provides additional security by requiring a secondary form of authentication when logging into an account
- Prevents anyone from being able to access your account even if they obtain your password
- Enabled by default with new AzureAD configurations
- Available for ITRAK 4.15 or higher
- Common forms of MFA with AzureAD are:
 - Microsoft Authenticator app
 - SMS message
 - Voice call



Single Sign-On (SSO)

- Enables a user to login once and access multiple company resources, applications, and web applications
- Increases security and convenience as users only need to remember a single password and don't need to sign in as often
- If you are already logged into Dynamics 365 and open ITRAK, you will be automatically logged in
- Also allows ITRAK portal pages to be embedded in Microsoft Teams without requiring an additional login



ITRAK External User Forms

- Embed external user forms in your website, Dynamics Portals/Power Apps portals, etc.
- Collect data from your contractors, vendors, and other third-party users
- Use your own colours, logo, branding to match your website
- Pass in parameters to prepopulate data

ITRAK 365 Incident

Form 1546

Draft

Preview

Analysis

Implementing Actions

Pending Review

Final Review

Closed

Next (Custom)

Save (Custom)

Sequence of Events

Sequence

Export to Excel Export to PDF

	Sequence number	Text
Edit	1.0	abc
Edit	2.0	bcd

+ Item

Form Classification

* Required

General Information

Title

Date/Time Reported

22-May-2020 4:00 PM

ITRAK Portal New Activities Area

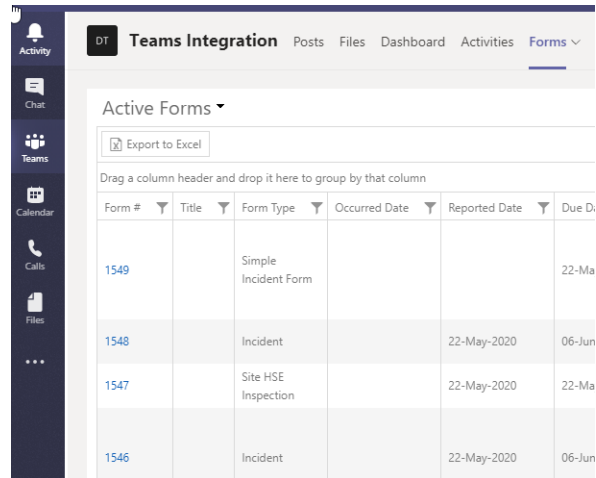
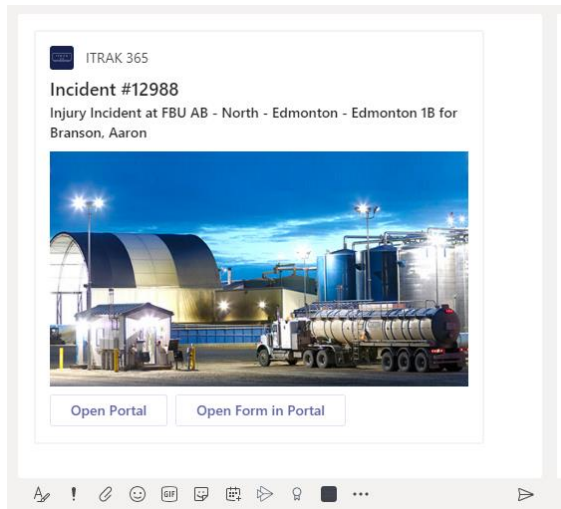
- Original Activities area has been renamed to dashboard
- Display your custom system views
- Choose which columns to display
- Use your own default filters to restrict which records will appear in the list
- Define how the list should be sorted

The screenshot displays the ITRAK 365 portal interface. On the left is a vertical navigation menu with orange buttons labeled 'Dashboard', 'Activities', 'Forms', 'Jobs', and 'Equipment'. The 'Dashboard' button is currently selected. The main content area has a green header with the 'ITRAK 365' logo and the word 'ITRAK'. Below the header, there are four tabs: 'ACTIVITIES' (selected), 'FORM TASKS', 'TASKS', and 'TRAINING TASKS'. The 'My Activities' section is visible, featuring an 'Export to Excel' button and a message: 'Drag a column header and drop it here to group by that column'. Below this is a table with two columns: 'Activity Type' and 'Subject'. The table contains three rows of data.

Activity Type	Subject
Email	test email
Phone Call	Phone call activity
Training Task	Test training task

Recap Microsoft Teams Integration

- Add custom Microsoft Teams tab to display your ITRAK forms, corrective actions/Form tasks
- ITRAK records still open in the same ITRAK UI your users use today
- Use ITRAK Teams app to post Microsoft Teams cards with link and information about an incident or other ITRAK form.
- Managers can now complete an approval directly from Teams
- Post ITRAK notifications to teams rather than sending emails when a new form is submitted or changes statuses



Teams Integration Posts Files Dashboard Activities **Forms**

Active Forms

[Export to Excel](#)

Drag a column header and drop it here to group by that column

Form #	Title	Form Type	Occurred Date	Reported Date	Due D.
1549		Simple Incident Form			22-Ma
1548		Incident		22-May-2020	06-Jun
1547		Site HSE Inspection		22-May-2020	22-Ma
1546		Incident		22-May-2020	06-Jun

ITRAK 365 Teams Integration

TRAK Portal

ITRAK

Activities

Forms

Events

Training

Documents

Procedures

Competency

Company

Team

Personal

+ ADD

VIEW

Health and Safety Incident

MB

SAFE Companies - Audit

Inspections

TRAK Portal embedded in Teams

Activity

Chat

Teams

Calendar

Calls

Files

...

DT Teams Integration

Posts

Files

Dashboard

Activities

Forms

Events

Training

Documents

Procedures

Competency

Company

Team

1 more

+

Active Forms

Export to Excel

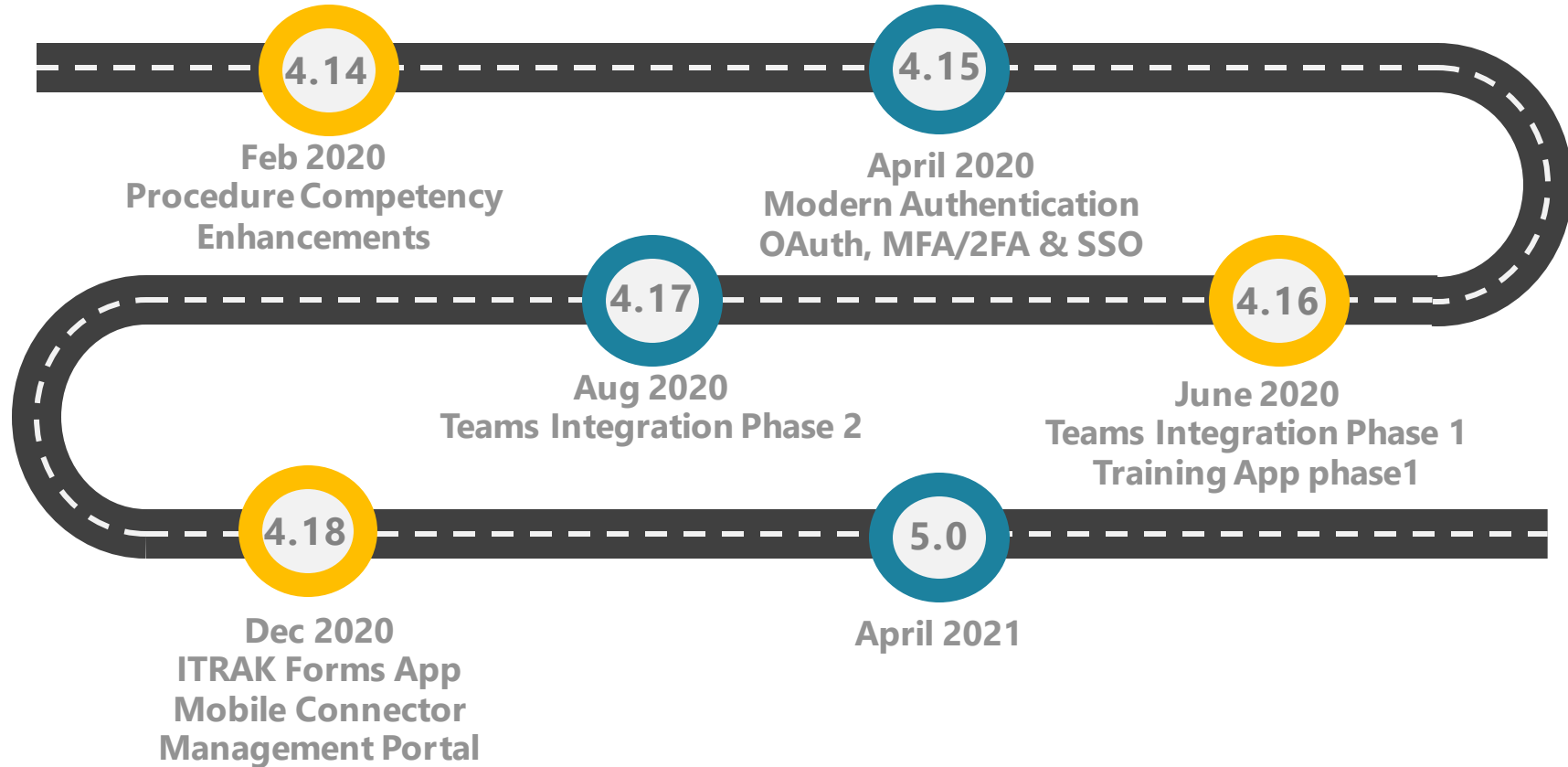
Drag a column header and drop it here to group by that column

Form #	Title	Form Type	Occurred Date	Reported Date	Due Date	Assigned To User	Assigned To Team	Employee 1	Form Status	Form Business Unit
1541		Simple Incident Form			20-May-2020	ITRAK Portal External User Application		Employee, Another Test	Draft	
1540		Simple Incident Form			19-May-2020	ITRAK Portal External User Application		Smith, Douglas	Draft	
1539		Simple Incident Form			15-May-2020	ITRAK Portal External User Application		Employee, Another Test	Draft	
1538		Simple Incident Form			15-May-2020	ITRAK Portal External User Application		Employee, Another Test	Draft	
1537		Simple Incident Form			15-May-2020	ITRAK Portal External User Application		Smith, Mary	Draft	

Other ITRAK Enhancements

- UCI (Unified Client Interface) model driven apps
- Spanish & French translations for ITRAK portal & Mobile
- Provide an ability to rename "SAVE" and "SAVE & CLOSE"
- Expanded Procedures & Competency module
- Enhanced Spills control
- Enhanced injury control
- Added additional options and sorting to the User-Defined item lists
- Added ability to show/hide sections based on categories
- Improved activities page (ITRAK Dashboard)
- Enhancements to built-in reporting
- Added busy indicators for long running processes
- Improved save/load times
- And much more

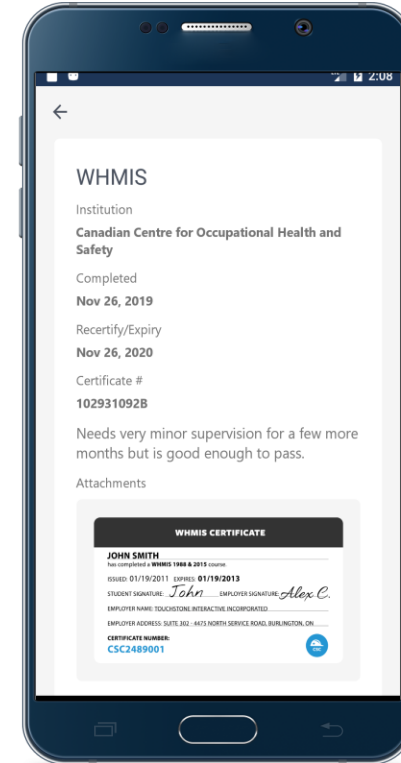
ITRAK 365 Release Roadmap



New Mobile App

The training app is a new tool for companies to:

- ✓ Make training easier
- ✓ Reduce paper burden
- ✓ Make certifications faster and more compliant
- ✓ Open training to more people





ITRAK Training App

- Certificates (Training Records)
- Azure AD Authentication
- New ITRAK Mobile API
- Alerts

ITRAK Procedure & Competency App

- Procedures
- Procedure Competency

ITRAK SharePoint Integration

- Document Management

ITRAK Forms App

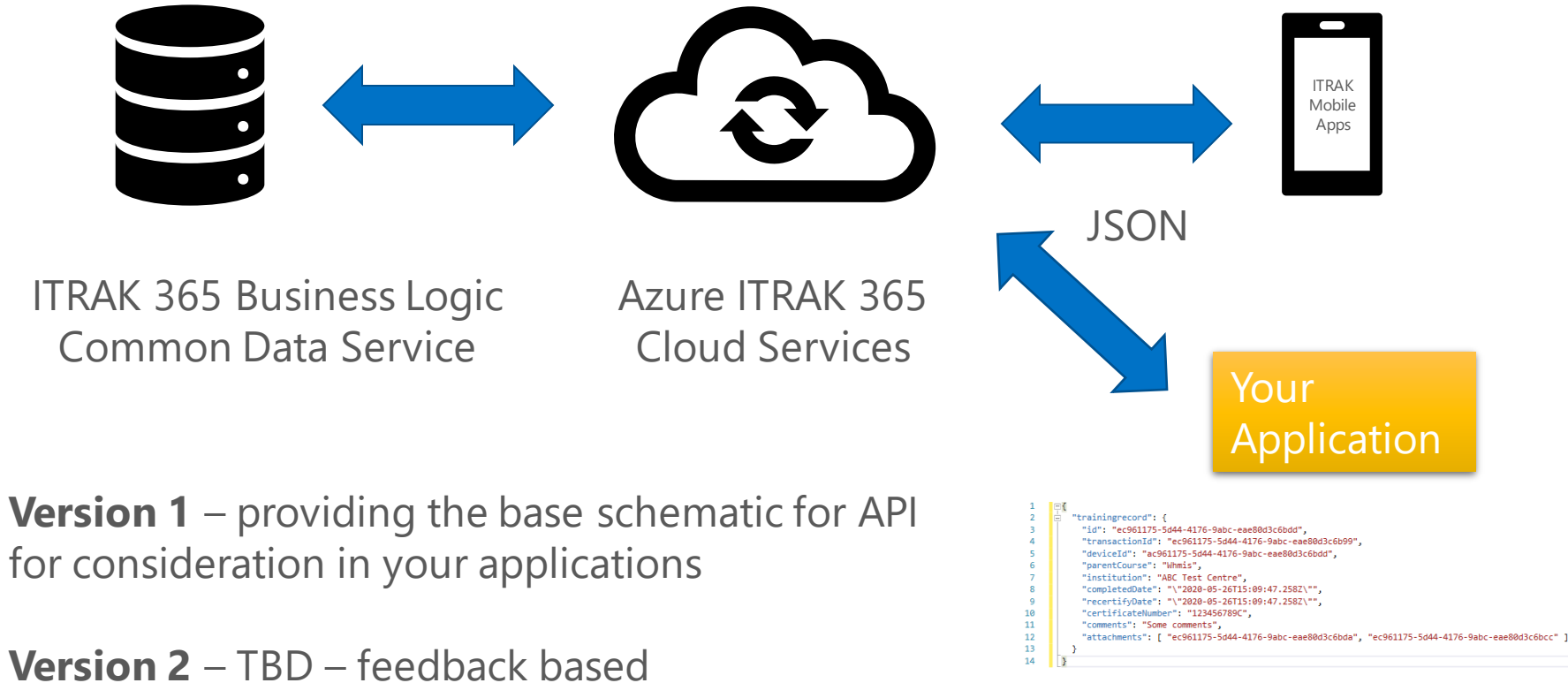
- Corrective Actions
- Form entry (Inspections, risk assessments, incidents,..)
- ITRAK Mobile Management Portal

ITRAK Training App Phase 2

- Exams
- Training Tasks
- Training Documents

Publishing and ITRAK 365 API... for your apps

API = Application Programming Interface, a way to share data easily with ITRAK



Questions?

ITRAK 365

ITRAK 365 Technical Enhancements in 2020

Thank You for Attending!

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SAFETY & COMPLIANCE SOFTWARE



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Dynamics 365



SAFETECH Synergy Schedule! Upcoming Sessions!

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

