2020

SAFETECH Synergy

Elevating **QHSE** with Industry Best **Technology!**

Presented by ITRAK

Wednesday May 27 1:00pm (MST)

# ITRAK 365 Technical Enhancements in 2020

***ISV Connect Premier Tier Partner***

ITRAK 365

Microsoft Dynamics 365 Certified

Microsoft

www.useitrak.com

# Introductions

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Senior Full Stack Software Developer

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Product Development & Innovation

# Agenda

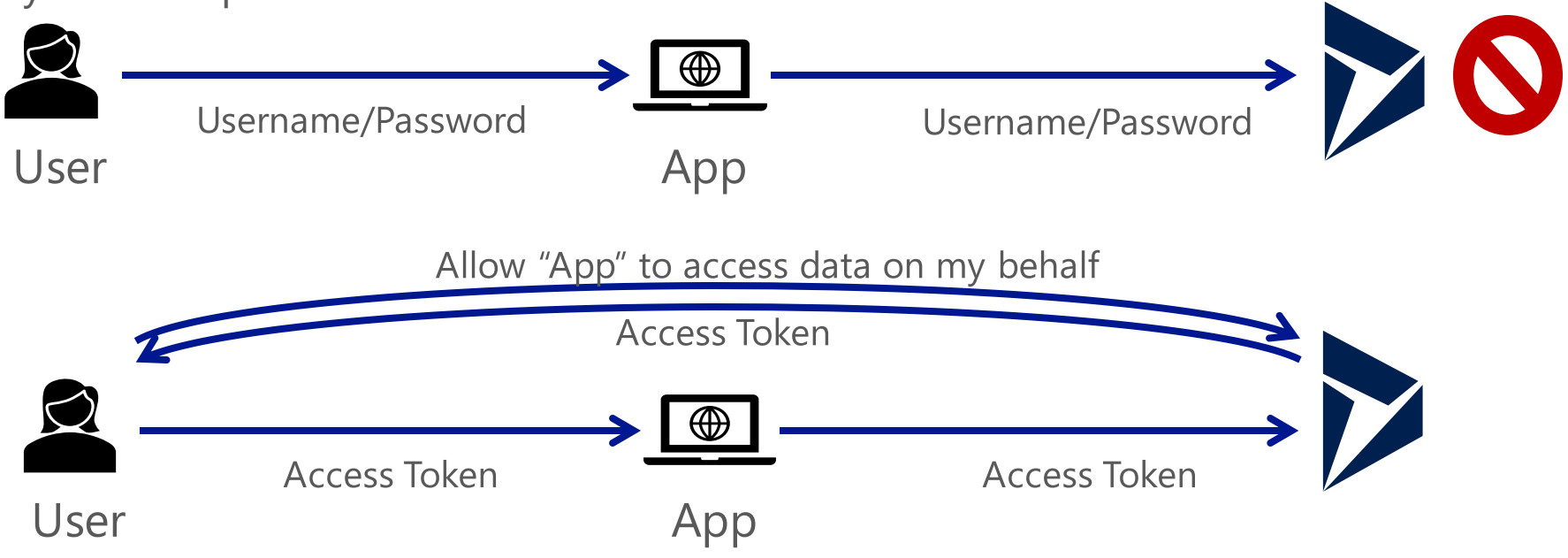
This session will cover a high-level overview of new ITRAK 365 technical enhancements. In depth details on many of these enhancements will be available in upcoming sessions.

- 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

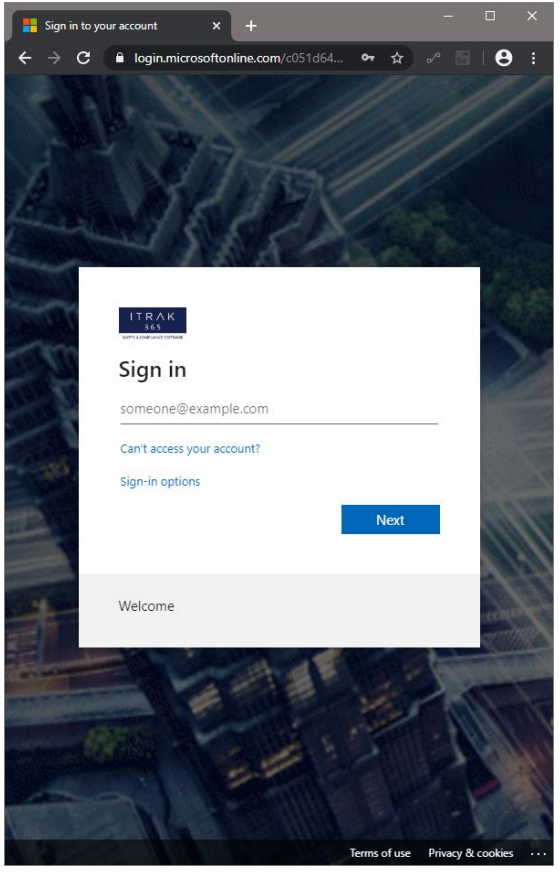
- What is OAuth2 - it is an industry-standard authorization framework
- Supported in ITRAK 4.15+

Why is this important?



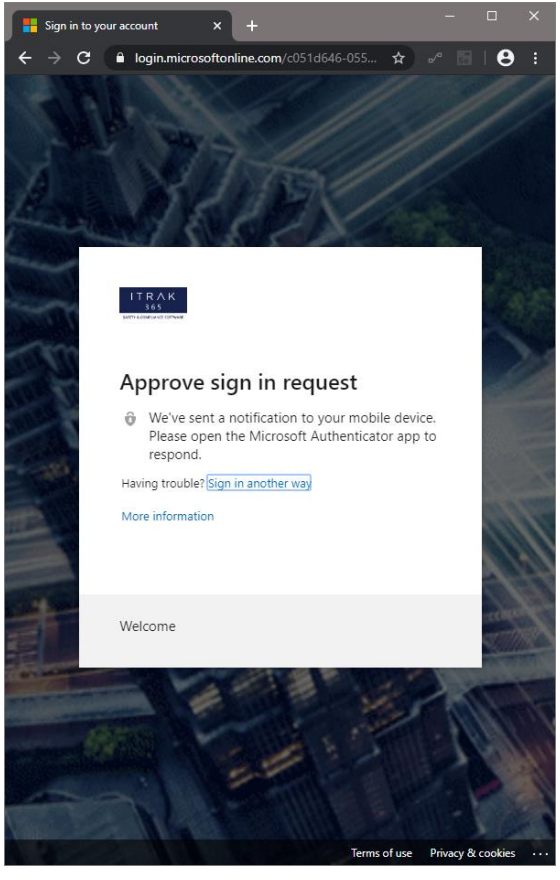
# OAuth 2.0 Authentication

- 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



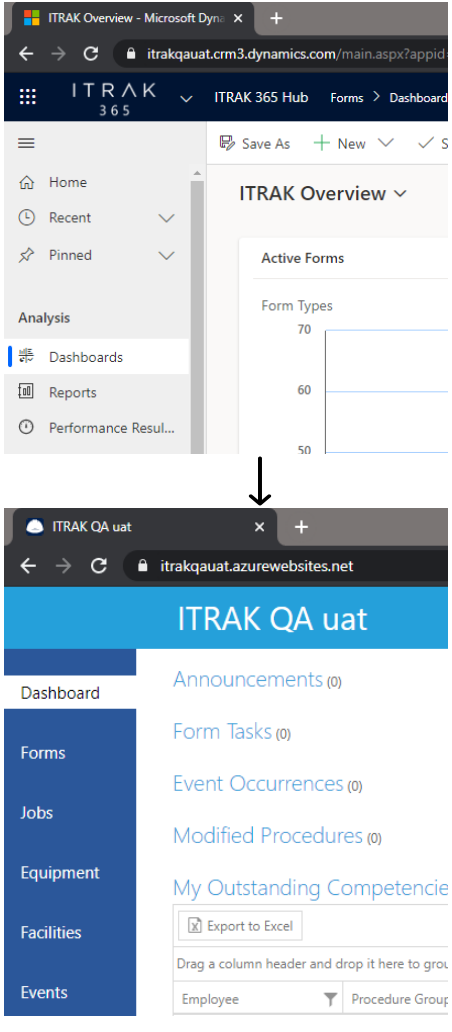
# Multi-Factor Authentication (MFA/2FA)

- 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



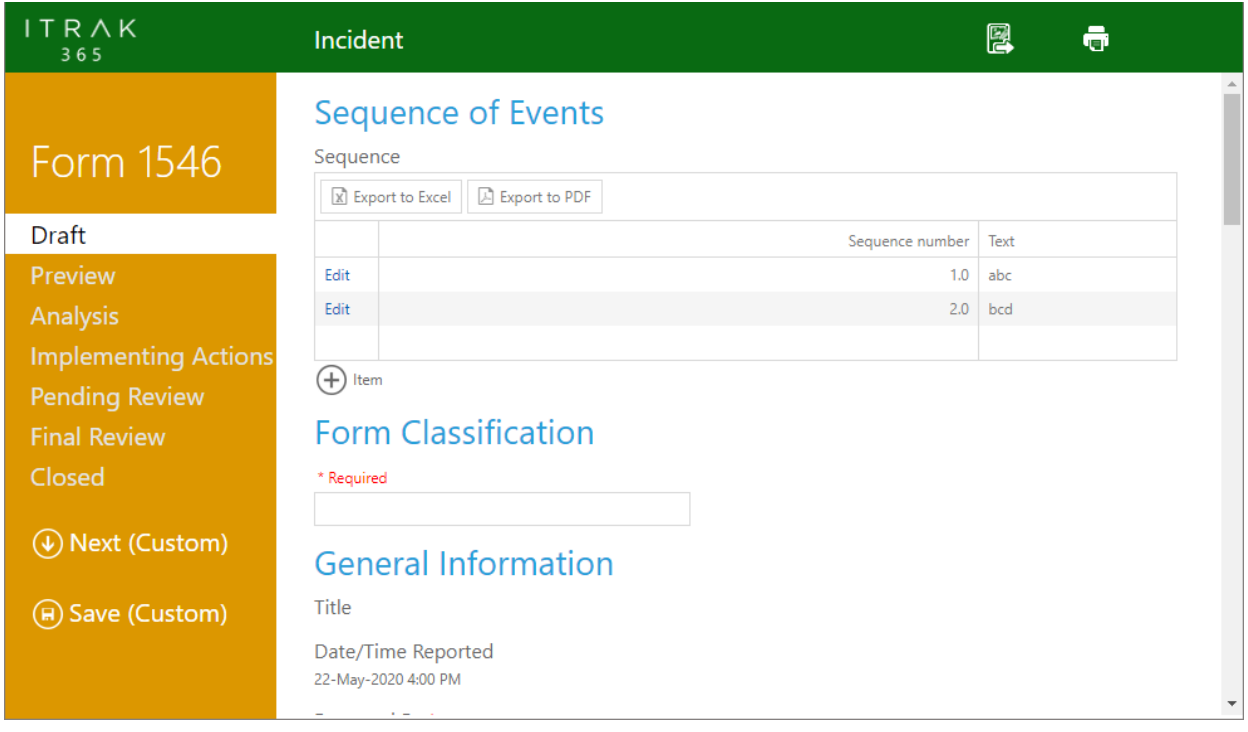
# Single Sign-On (SSO)

- 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



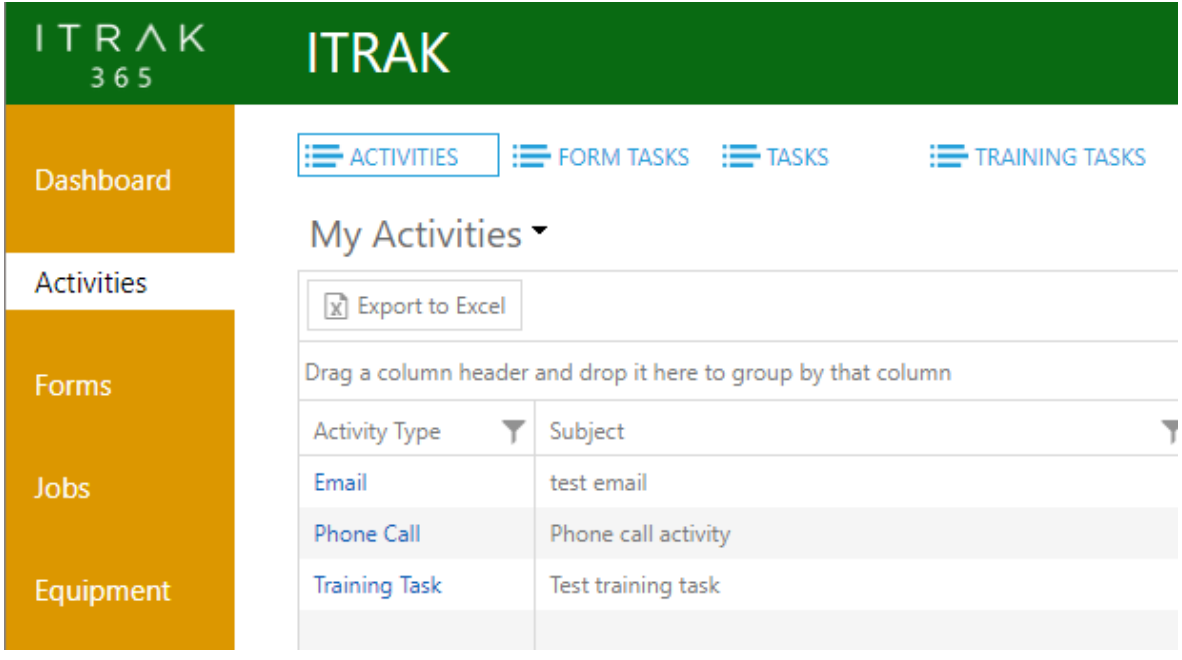
# ITRAK External User Forms

- 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



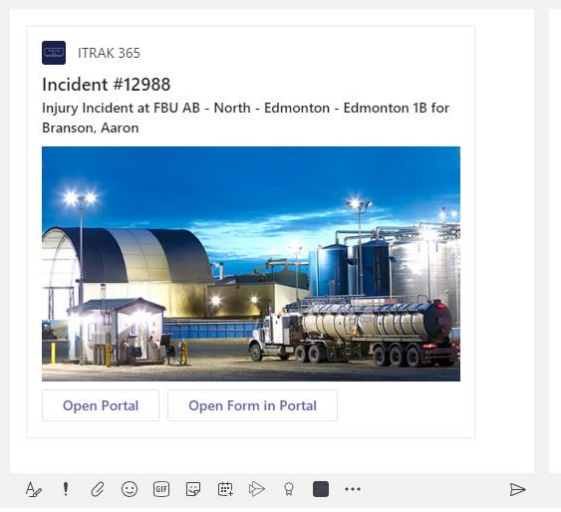
# ITRAK Portal New Activities Area

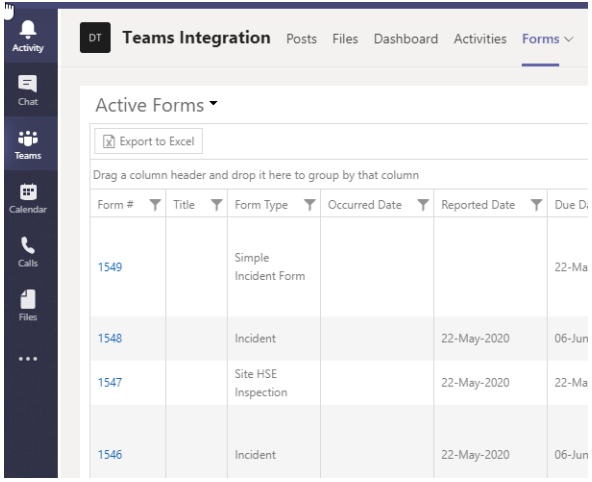
- Original Activities area has been renamed to dashboard
- Display your custom system views
- Choose which columns to display
- Use your own default filters to restrict which records will appear in the list
- Define how the list should be sorted



# 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 then sending emails when a new form is submitted or changes statuses

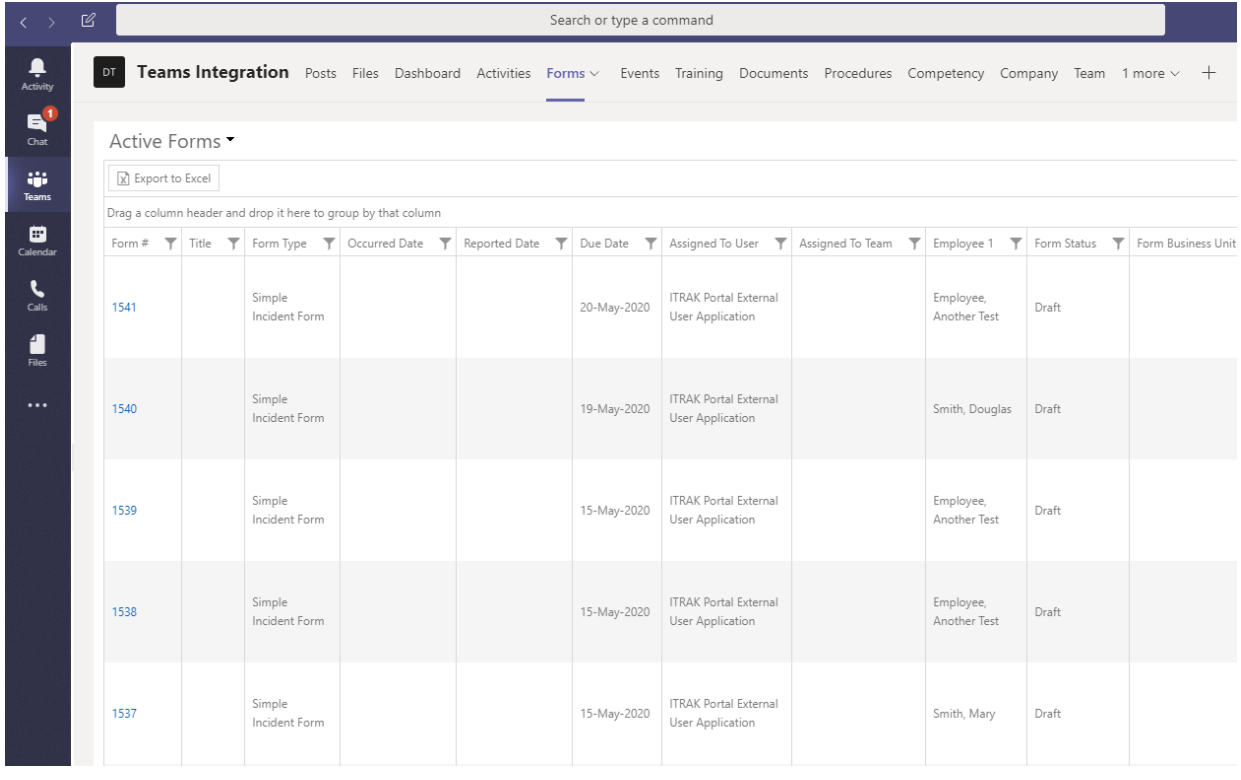


# ITRAK 365 Teams Integration

## TRAK Portal

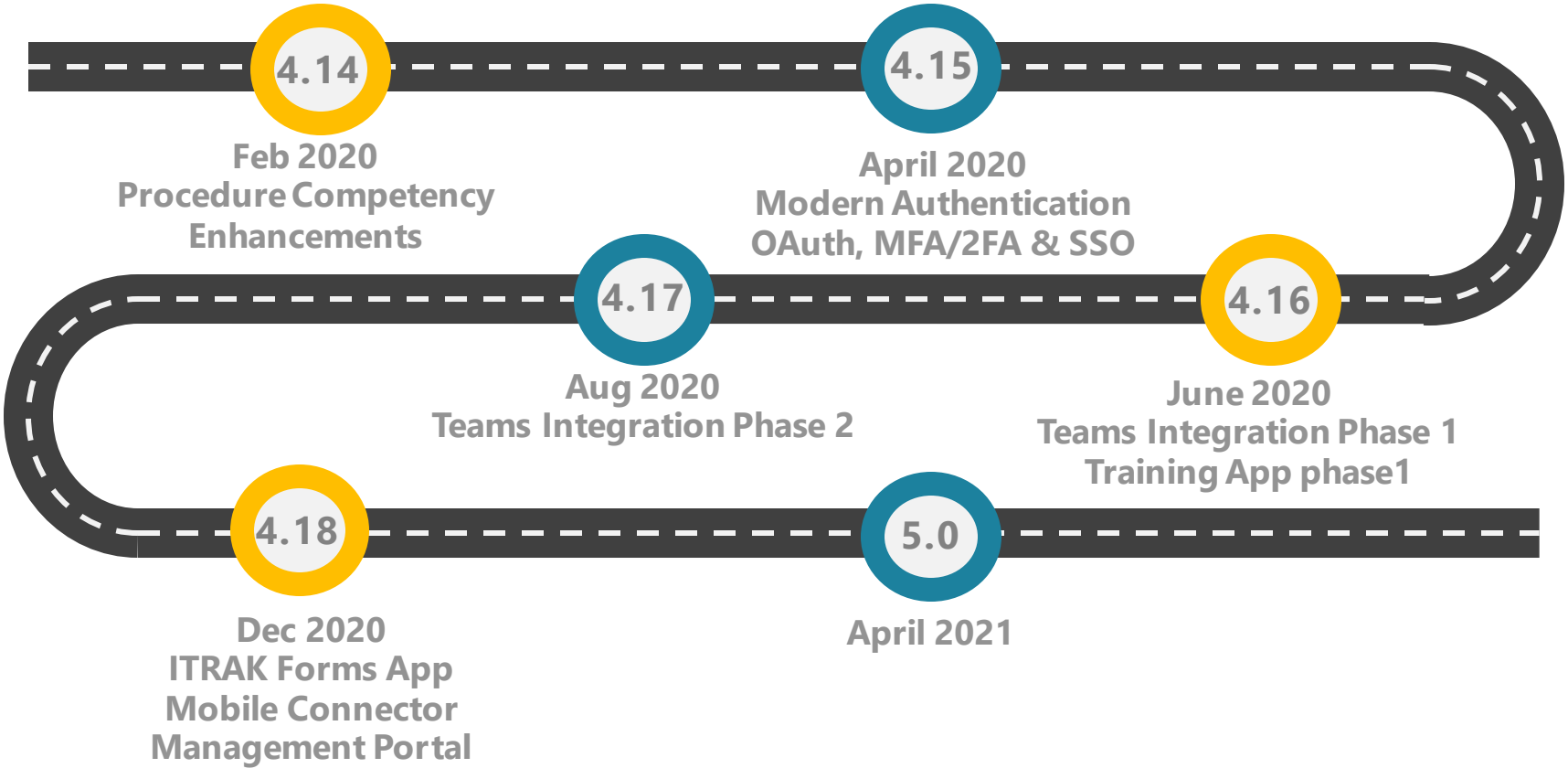
## TRAK Portal embedded in Teams



# 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

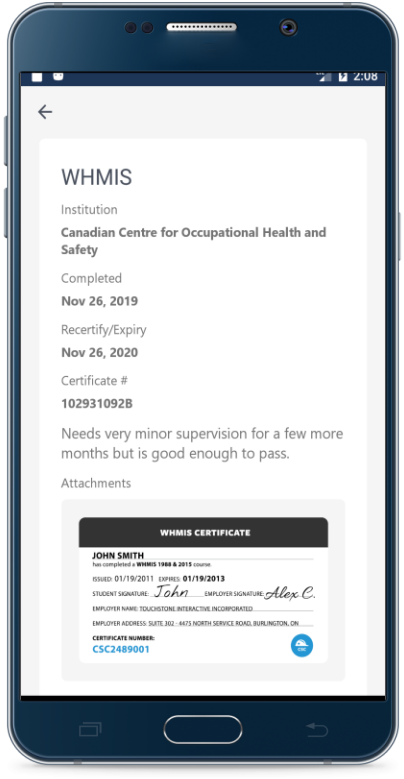
# ITRAK 365 Release Roadmap

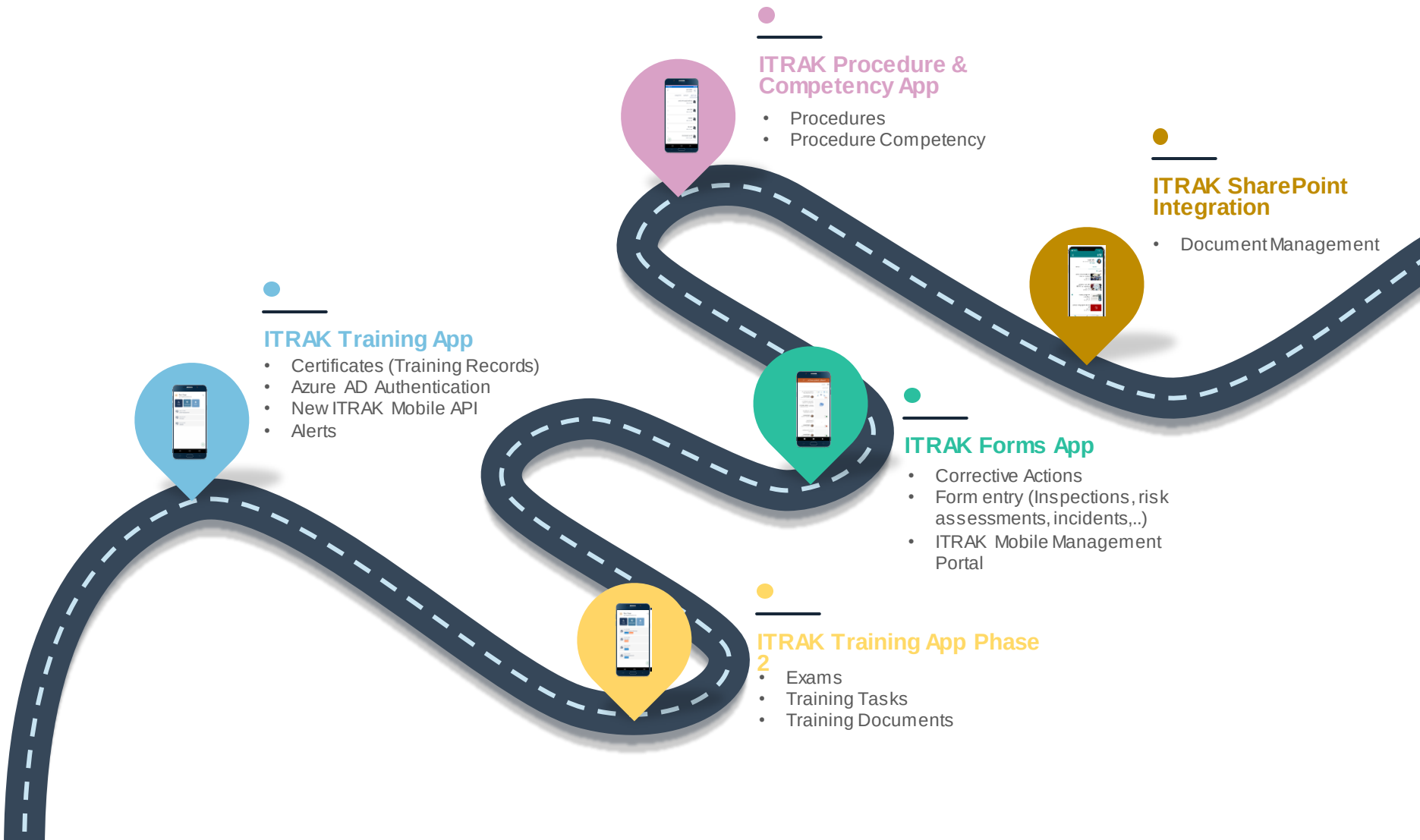


# New Mobile App

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

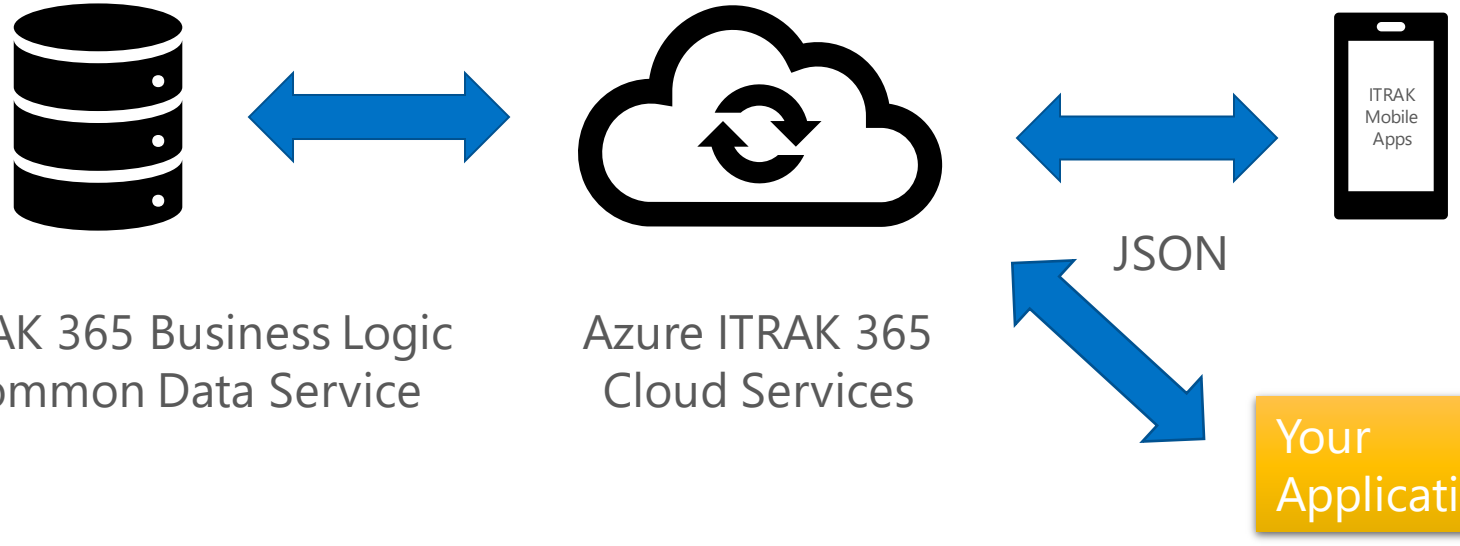
- Corrective Actions
- Form entry (Inspections, risk assessments, incidents,..)
- ITRAK Mobile Management Portal

## ITRAK Training App Phase 2

- Exams
- Training Tasks
- Training Documents

# Publishing and ITRAK 365 API… for your apps

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




**Version 1** – providing the base schematic for API for consideration in your applications

**Version 2** – TBD – feedback based


```
{
  "trainingrecord": {
    "id": "ec961175-5d44-4176-9abc-eae80d3c6bdd",
    "transactionId": "ec961175-5d44-4176-9abc-eae80d3c6b99",
    "deviceId": "ac961175-5d44-4176-9abc-eae80d3c6bdd",
    "parentCourse": "WHmis",
    "institution": "ABC Test Centre",
    "completedDate": "\"2020-05-26T15:09:47.258Z\"",
    "recertifyDate": "\"2020-05-26T15:09:47.258Z\"",
    "certificateNumber": "123456789C",
    "comments": "Some comments",
    "attachments": [ "ec961175-5d44-4176-9abc-eae80d3c6bda", "ec961175-5d44-4176-9abc-eae80d3c6bcc" ]
  }
}
```

**ITRAK 365**

# ITRAK 365 Technical Enhancements in 2020

## Thank You for Attending!

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# SAFETECH Synergy Schedule! Upcoming Sessions!

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