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# ITRAK 365 Hidden (or Lesser Known) Treasures

Webinar by Tom M



## Topics

- UCI
- Single Sign-On (SSO)
- Mobile Search, Forms Grouping, Modes
- Mobile – Branded App
- Kiosk App
- External Forms
- Forms Controls +
- Test Drive
- Community Edition
- Open Q&A



Webinar will begin shortly.

Please mute yourself.

Ask questions in the Q&A panel.

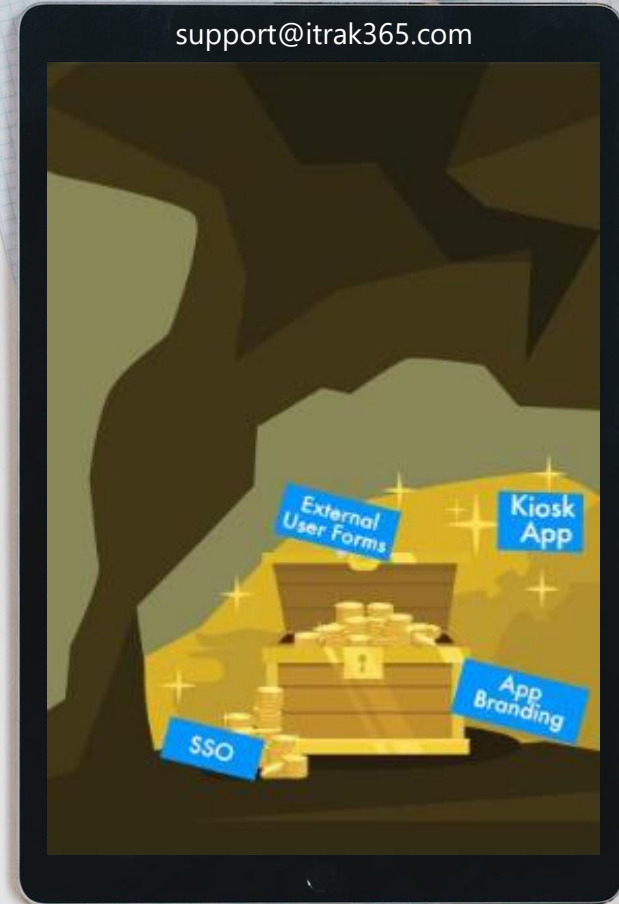
There is a built-in 15-30sec delay.

Session is being recorded.

ITRAK  
365

SAFETY & COMPLIANCE SOFTWARE

[support@itrak365.com](mailto:support@itrak365.com)



# NEW DYNAMICS 365 UI/UX

*Did you know that Microsoft Dynamics 365 has a new UI?*

Home

Dynamics 365

Customer Service Hub

Dynamics 365 Mobile – c...

ITRAK

ITRAK 365 Waste Dispositi...

ITRAK HR

ITRAK HR Hub

ITRAK Hub

Sales Team Member

Solution Health Hub

Home

Recent

Pinned

Analysis

Dashboards

Reports

Performance Results

Employees

Employees

Employee Job Roles

Training

Training Tasks

Forms

Form Types

Form Business Units

Form Business Uni...

Form Checklists

Form Groups

Form Status

Form Inspections

Forms

Change area

Forms

Training

Operations

Settings

Forms

Save As + New ✓ Set As Default Refresh All

ITRAK Overview

Active Forms

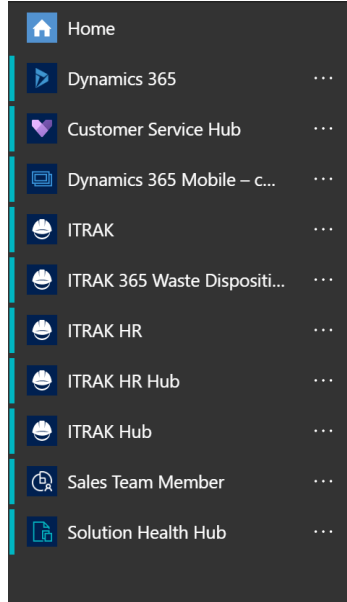
Form Types

Form Type	Count
Anonymous For...	7
BREAKER < > B...	2
Calculated Number Fields 4...	11
Dispatch Status Form	11
Field Controls 4.07	6
Field Testing 2.0	13
Fields that use Note permis...	10
Fields w/ Employees	7
Form Injury Generic Field te...	31
Form w/ Fields default by...	19
Gary Oldman	4
Hazard Assessment (HA / I...	12
Incident	4
Incident Injury 3	19
Incident Injury Non Employee	31
Incident Injury Vehicle 2 / # ...	2
Inspection	5
Inspection w/8 Sections	3
Inspection	11
KA_Test3	35
KA_Testform2	13
MB Inspection	12
Meeting - PDO Defined	19
NMB Time Ticket Test	62
Project	6
Safety State - Manager Entry	11
Section Display	7
Share Sections / Fields	14
Simple Form	17
Spill Control Testing	6
Sweet Alert Fields	1
UD Attachment Testing	2
	7
	8
	5
	9
	4
	3
	3
	9
	5
	2
	3
	4
	6
	45

Task	Email	Appointment	Phone Call
✓ Activity Type	Subject	Regarding	Priority
Task	Task 1	---	---
Task	Another item	Procedure Competency Ste	---
Task	ER 1-1	---	---

# NEW DYNAMICS 365 UI/UX

## Unified Common Interface (UCI)



- Side-bar Navigation & Breadcrumbs
- New Graphics, Colour Controls, Visual Aides
- Auto-scaling (Re-flow)
- Less Clicks, Sub-Grids
- Recent & Favorite Options
- Faster Performance
- Improved Role-based Security
- More integration & development options
- ***And more!***

➤ Microsoft will migrate everyone to UCI on October 1, 2020

➤ Check out our [previous webinars](#) on the subject for more info

➤ *Make sure to make a migration plan with us (if you're on an older version) to keep your ITRAK working after October!*

Change area

✓ Forms

Training

Operations

Settings

F

Forms



# SINGLE SIGN-ON (SSO)

- Seamless ITRAK 365 Portal sign-on when authenticated with Dynamics 365
- Seamless Dynamics 365 sign-on when authenticated in the ITRAK 365 Portal
- ***Go back-and-forth. No extra login credentials required!***
- Rebuilding of ITRAK Authentication
  - Increased security standards
  - Built together with Microsoft
  - Opens up more options for users
- Also, MFA/2FA options

***Auto-Login!***



Sign in with Microsoft

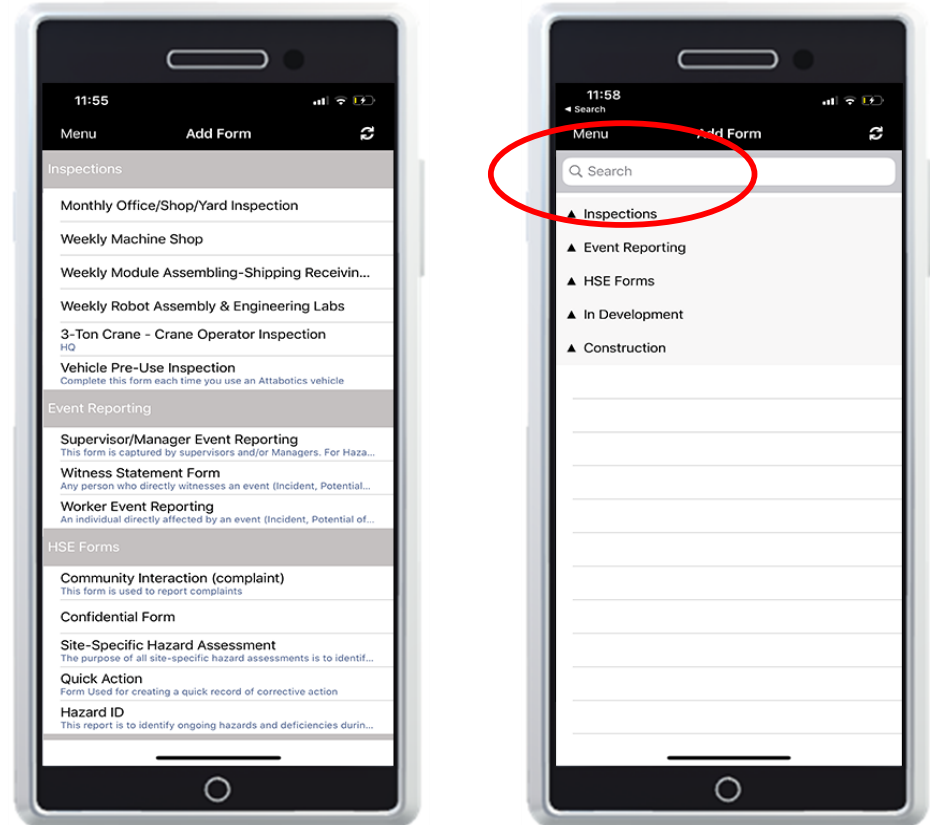
*Windows  
MS Teams  
Office365*

# MOBILE APP ENHANCEMENTS

Old vs. New

## ▪ Search Functionality

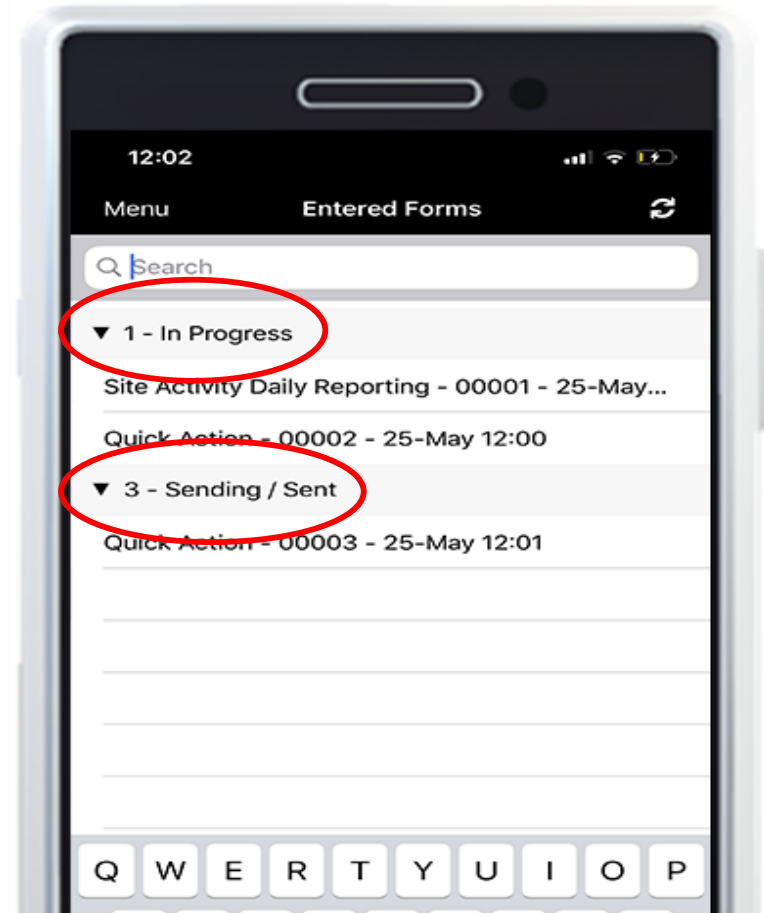
- When adding a new Form or Procedure
- You can now search form types, forms, or procedures by Name



# MOBILE APP ENHANCEMENTS

## ▪ Forms Grouping

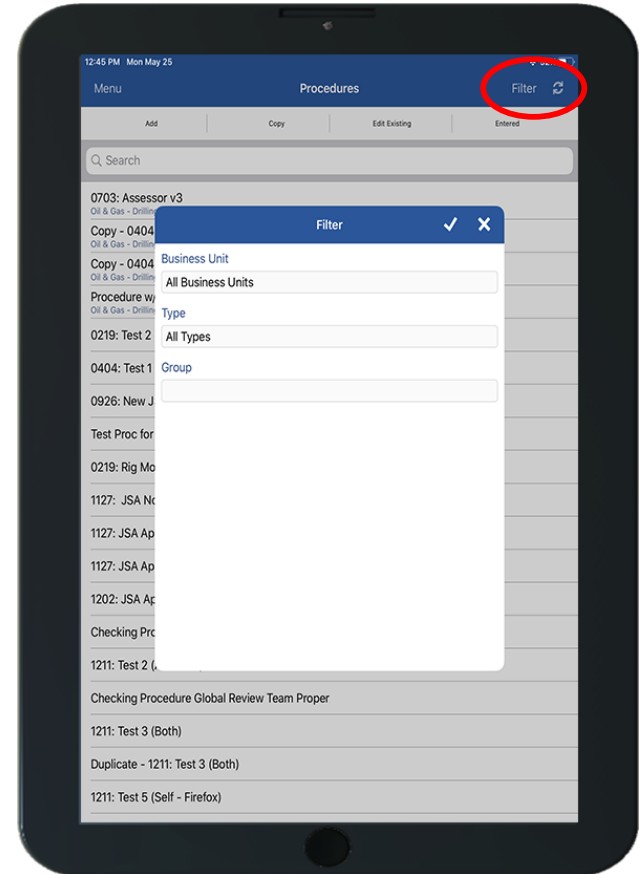
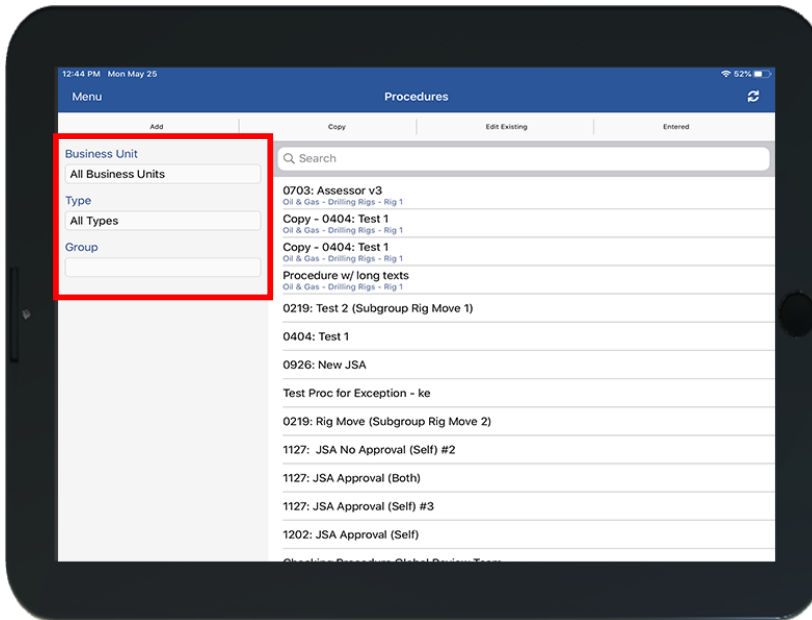
- The individual form types are now assembled **by Form Groups**
- Groups can be named as desired
- Also grouped by their mobile status when searching



# MOBILE APP ENHANCEMENTS

## ▪ Procedures Page

- Portrait or Landscape Modes
- Filters



# ITRAK 365 BRANDED MOBILE APP

- *Did you know that you can rebrand our regular ITRAK mobile app to something of your own?*
- *Engage employees and boost product confidence with your brand!*
- Have your own:
  - Icon
  - Corporate colors
  - Other elements of your visual identity
- Publish your branded app to the App Store & Google Play just like the regular app!



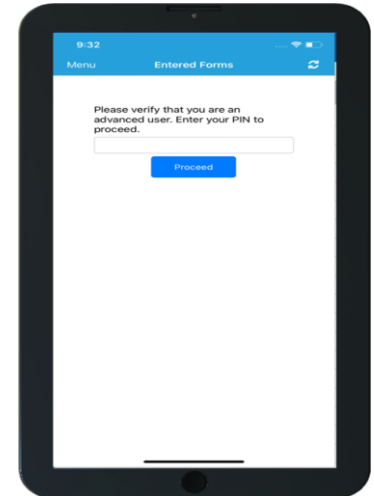
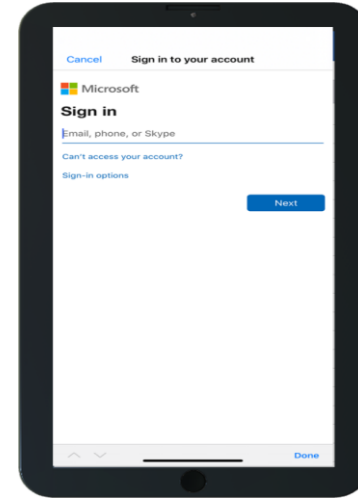
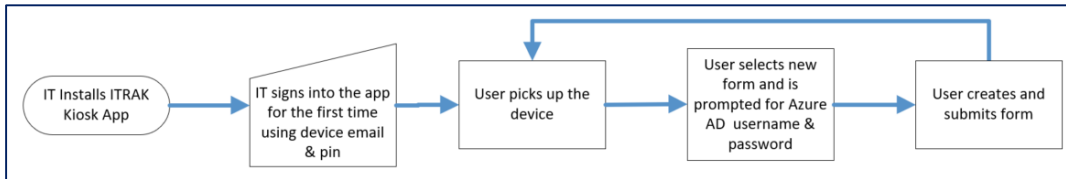


# ITRAK 365 KIOSK APP

## *What is the Kiosk App?*

- Allows users to SHARE a device; such as at warehouses, processing plants, stations, field offices, and more
- Same functionality, different login method (dropdown list)
  - Does not require users to have a corporate email
- **Often just \$1 on top of our regular mobile user license.**
  - Increased flexibility for the users and for IT!
    - Sign in, enter a form, Auto-Signed out!

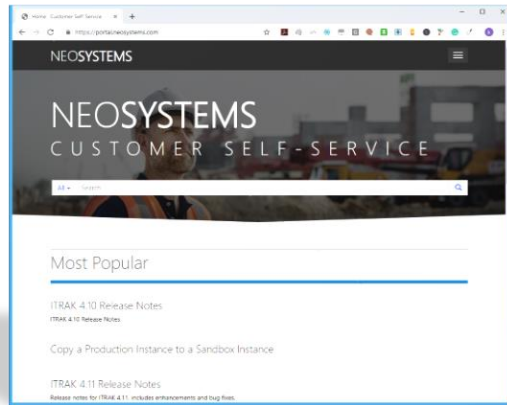
*It's that simple...*



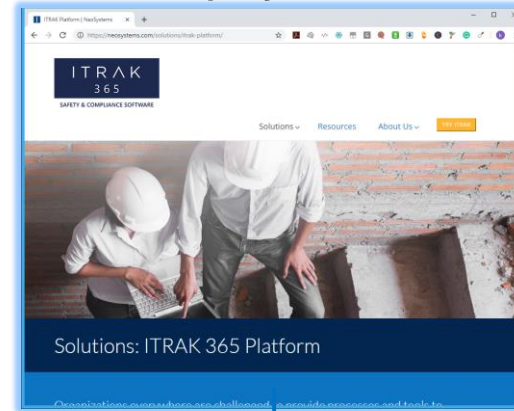
# EXTERNAL USER FORMS

*A simple way to interact with external users using your D365 Portal or Business website and ITRAK 365 Forms!*

Microsoft D365 Portal



Company Website



**Add Visual Appeal & Interactivity.**

A screenshot of the ITRAK 365 Form for 'Individual Owner Operator Audit (IOO)'. The form is divided into sections: 'Company Information' and 'Activities'. The 'Company Information' section includes fields for 'Legal Company Name', 'Mailing Address', 'City', 'Province', 'Postal Code', 'Phone', 'Company Trade Name/alias', 'Company Owner(s)', 'Title/Position', and 'Email'. There are also checkboxes for 'Is your Street Address different than your Mailing Address?' and 'Is your City different than your Mailing Address?'. The 'Activities' section has a text area for 'What does your company do as its main activities?' and a text area for 'List the Operating Location(s) this audit applies to (head office city and any branch names/aliases)'. The form has a sidebar with navigation options: 'New', 'With Auditor', 'Receiving', 'Prepare Review', 'With Reviewer', 'Final Administration', 'Completed', 'Send to BCSFC', 'Save', and 'Save & Close'.

**Increase Visibility & Add Flexibility!**

# EXTERNAL USER FORMS - COLOR PANEL

Old vs. New

The image compares two versions of an external user form interface. The left panel, titled 'Form 1551', features a blue header and a dark blue sidebar with navigation options: Draft (selected), Review, Closed, Next (Custom), Save (Custom), Save And Close (Custom), and Draft (Custom). The main content area is white with a blue header 'Type 3 & 4 Incident Review' and a section 'General Information'. It contains several form fields: Date of Fire, Date & Time of Review (26-May-2020 12:25 AM), Incident Commander (Shilpa Seenappa), Location (Calgary), Fire Class (Moderate), Weather Forecast Attached (Yes), Fire Behaviour Advisory, Indices Attached (Yes), Do you have the IFR to attach? (Yes), and UD Multi Select (1 or more items are required). The right panel, titled 'Incident', has a green header and an orange sidebar with navigation options: New (selected), Draft, Preview, Analysis, Implementing Actions, Pending Review, Final Review, Closed, Next (Custom), and Save (Custom). The main content area is white with a green header 'Incident' and a section 'Sequence of Events'. It includes a 'Sequence' table with 'Export to Excel' and 'Export to PDF' buttons, a 'Form Classification' section, and a 'General Information' section with fields for Title, Date/Time Reported (26-May-2020 12:28 PM), Reported By (External User, ITRAK Portal Application), Business Unit, and a facility selection note.

**Form 1551**

Type 3 & 4 Incident Review

General Information

Date of Fire \*

Date & Time of Review \*

26-May-2020 12:25 AM

Incident Commander \*

Shilpa Seenappa

Location \*

Calgary

Fire Class \*

Moderate

Weather Forecast Attached \*

Yes

Fire Behaviour Advisory \*

Indices Attached \*

Yes

Do you have the IFR to attach? \*

Yes

UD Multi Select \*

1 or more items are required.

Edit

**Incident**

ITRAK 365

Sequence of Events

Sequence

Export to Excel Export to PDF

To enable this content, save the record

Form Classification

General Information

Title

Date/Time Reported

26-May-2020 12:28 PM

Reported By \*

External User, ITRAK Portal Application

Person or Team entering the form into ITRAK.

Business Unit \*

Choose the facility where the event took place. If the event did not take place at a facility choose the applicable business unit based on the person(s) involved in the incident.

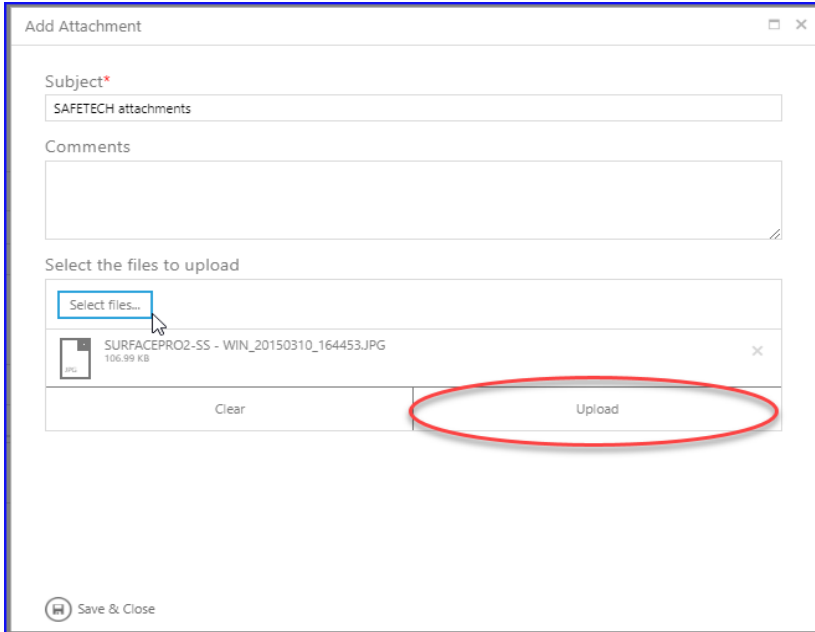
*Match the colour scheme to your Corporate colours!*

# AUTO UPLOAD ATTACHMENTS

 Auto uploading

Version 4.16

Old vs. New



Add Attachment

Subject\*

SAFETECH attachments

Comments

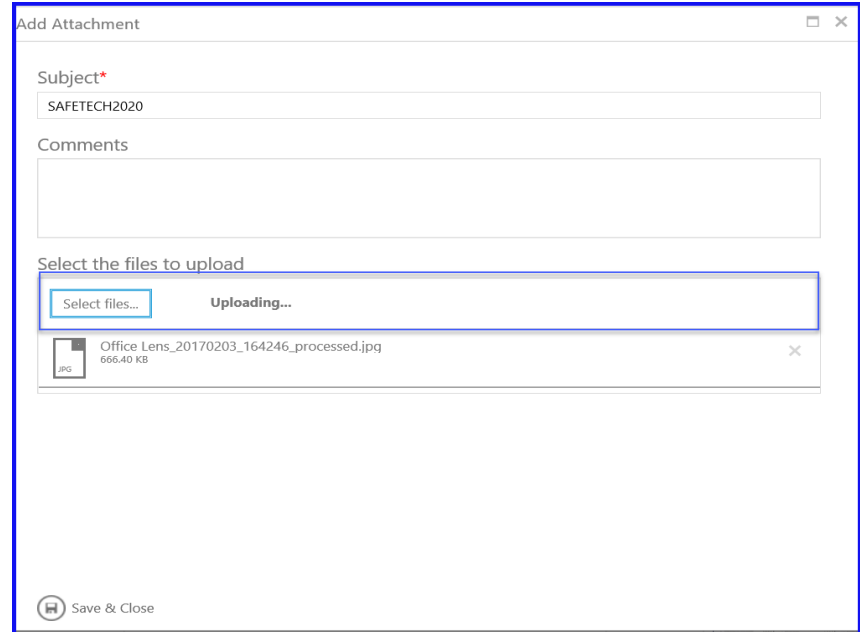
Select the files to upload

Select files...

SURFACEPRO2-SS - WIN\_20150310\_164453.JPG  
106.99 KB

Clear Upload

Save & Close



Add Attachment

Subject\*

SAFETECH2020

Comments

Select the files to upload

Select files... Uploading...

Office Lens\_20170203\_164246\_processed.jpg  
666.40 KB

Save & Close

*No longer need to click the "Upload" button!*

# RENAME STATUSES



Rename the Save, Draft, Return to Draft, Cancel, Save & Close statuses

Version 4.15

Type 3 & 4 Incident Review

Form 1551

Draft

Review

Closed

Next (Custom)

Save (Custom)

Save And Close (Custom)

Draft (Custom)

General Information

Date of Fire \*

Date & Time of Review \*

26-May-2020 12:25 AM

Incident Commander \*

Shilpa Seenappa

Location \* ⓘ

Calgary

Fire Class \*

Moderate

Weather Forecast Attached \* ⓘ

Yes

Fire Behaviour Advisory \*

Indices Attached \*

Yes

Do you have the IFR to attach? \*

Yes

UD Multi Select \*

1 or more items are required.

Edit

*Used when moving forms  
to the next status.*

# GET SYSTEM IDS & LIST ORDERING



Easy Access to Form Type ID

es ▾ | Run Report ▾ | **Show Id** | Export Form Type ▾ ×

dynamics.com needs some info from you.

Form Type Id:

{B6BAF409-C157-E911-A983-000D3AF3EB40} ×

OK Cancel

- *Useful for External Forms & Custom Development*



Item list Sorting

Sort By	Column 1
Order	Ascending

- *Available for all Columns*

# TEST DRIVE

*Did you know that you can test drive ITRAK 365 at any time?*

- Perfect for new customers, customer references, and anyone else that's curious.
- Find the 'TRY ITRAK' button on our website or through AppSource...

Solutions ▾

Resources

About Us ▾


TRY ITRAK



Available on  
Microsoft AppSource

- <https://appsource.microsoft.com/en-US/product/dynamics-365/neosystems.itrak?src=websitetestdrive>

Search: **"ITRAK 365"**



Microsoft | AppSource Apps ▾ Search Microsoft AppSource 🔍 More ▾ ❤️ 😊

Apps > ITRAK 365 Safety & Compliance Platform for Dynamics 365 CE inc...



ITRAK 365  
SAFETY & COMPLIANCE SOFTWARE

CONTACT ME

TEST DRIVE

What's Test Drive?

**Test Drive duration**  
2 hours

**Products**  
[Dynamics 365 Sales](#)  
[Dynamics 365 Customer Service](#)  
[Dynamics 365 Field Service](#)  
[Power Apps](#)

**Publisher**  
NeoSystems

**Acquire Using**  
Work or school account

**Version**  
4.12

**Categories**  
Apps > Safety & Compliance

## ITRAK 365 Safety & Compliance Platform for Dynamics 365 CE inc...

NeoSystems

★★★★★ 3.7 (3)

Preferred solution

Overview Reviews


ITRAK 365 Safety Mgmt platform including: Incident, Inspection, Hazard ID, Safety Meeting

ITRAK 365 is the definitive software solution for managing all aspects of a company's Quality, Health, Safety & Environment (QHSE/EHS/HSE) processes and is built from the ground up using Microsoft cloud technologies. ITRAK 365 contains a collection of industry and standards based workflows, processes and reporting controls for connecting organizations with their onsite field workers.

Typical implementations include:




- Incident management
- Audits & Inspections
- Hazard Identification
- Corrective Actions
- Risk Assessments
- Causal Analysis

ITRAK 365 is built on Microsoft Dynamics 365 CE, Microsoft Azure and Microsoft Cognitive services. ITRAK 365 is available as either a software service or a complete managed service





Microsoft Dynamics 365 Certified

Power BI



Our Technology Partners





# ITRAK 365 – FREE Community Edition

*Are you a company affected by Covid-19 issues? Employees getting ready to Return to Work? Need Pre-Built Safety Processes?*

**Don't have ITRAK? NO PROBLEM.**

**Try our Community Edition sponsored by Microsoft Canada!**

\* 15 Form Types \* Up to 1000 forms per month \* Unlimited Users \*

[www.itrak365.com/covid-19](http://www.itrak365.com/covid-19)

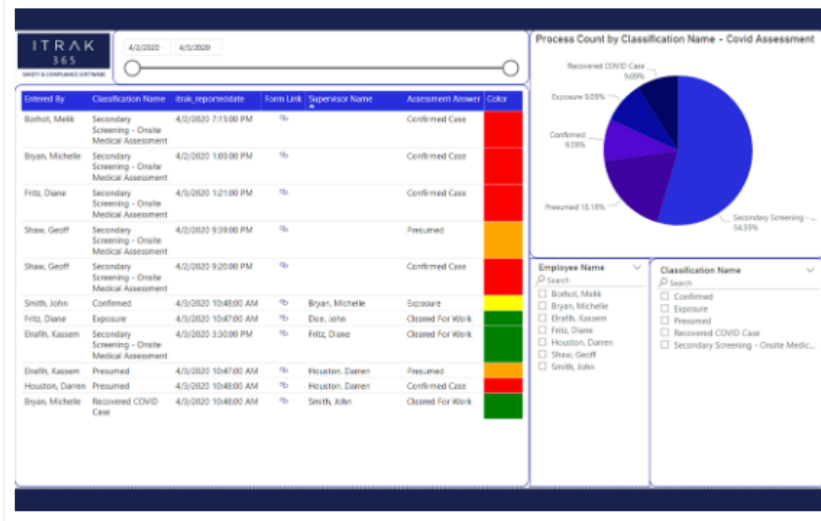
Did I mention that it's FREE? To anyone! Really.



# ITRAK 365 – FREE Community Edition

- Comes with built-in Power BI Reporting Dashboards too! Examples:

## Monitoring Health Status of Employees



## Employee Interaction Heat Map



- **Perfect for SMBs!**
- **Easy to start (Just Register)** and you can absolutely use this even if you've never seen Dynamics or ITRAK products before!

We also have a standing 2pm (MST) Q&A and Demo session **EVERY MONDAY!**

# Questions?

support@itrak365.com



[www.itrak365.com/webinars](http://www.itrak365.com/webinars)

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