

2020
SAFETECH
Synergy

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

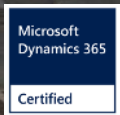
Wednesday May 27 1:45pm (MST)

Microsoft Teams Explosion



ISV Connect Premier Tier Partner

ITRAK
365



www.useitrak.com

INTRODUCTIONS



Melik Borhot
Product Development & Innovation




Diane Fritz
Senior Consultant


2


3


1


21:05












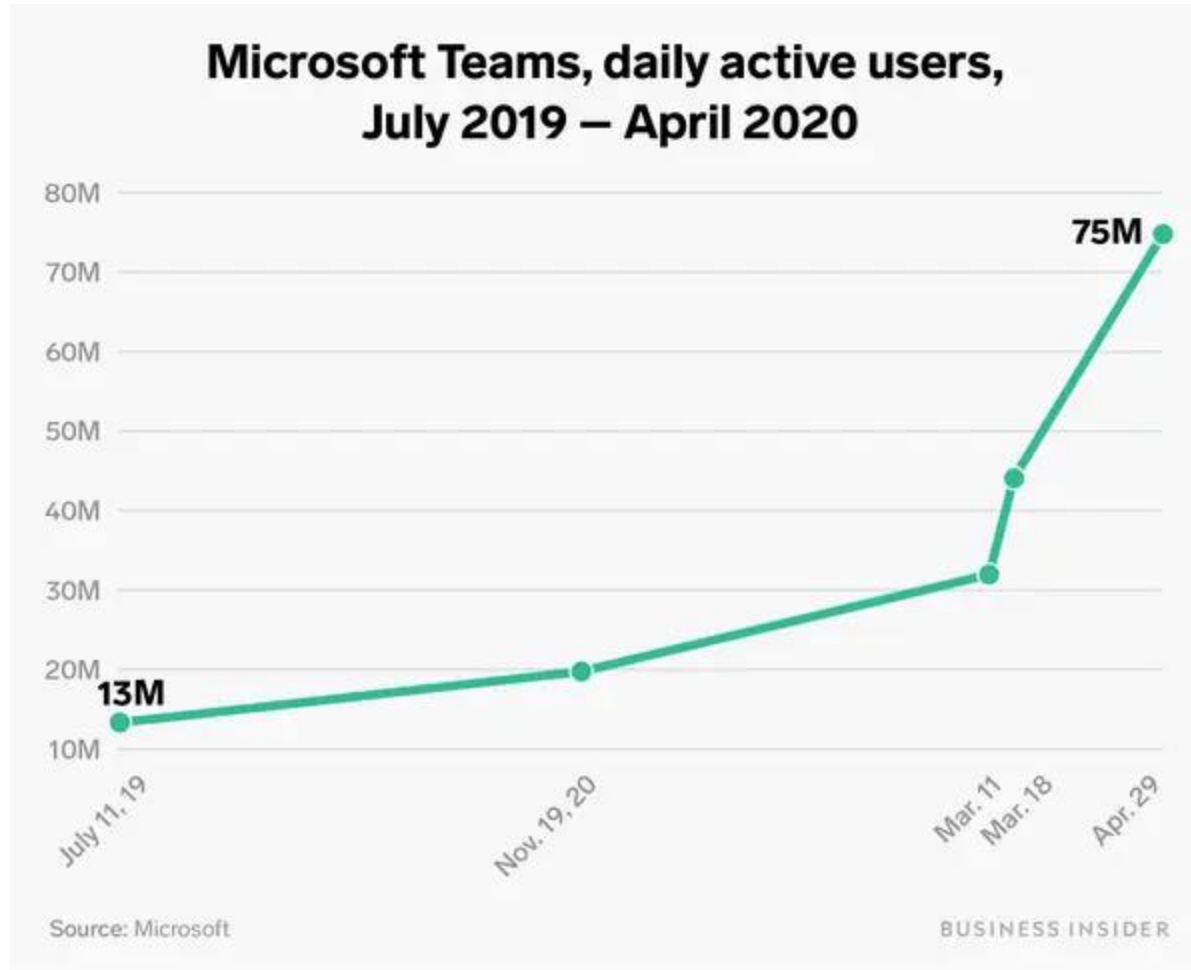








Microsoft Teams use has exploded



"COVID-19 has impacted the lives of people around the world. **We believe it will be a turning point for the way people will work and learn,**" Jared Spataro, a Microsoft corporate vice president, wrote in a statement the company provided in an email on Wednesday. "Our customers have certainly turned to Teams during this challenging time, and we've seen usage spikes in markets most impacted by COVID-19."

Demo – Teams in action

Teams

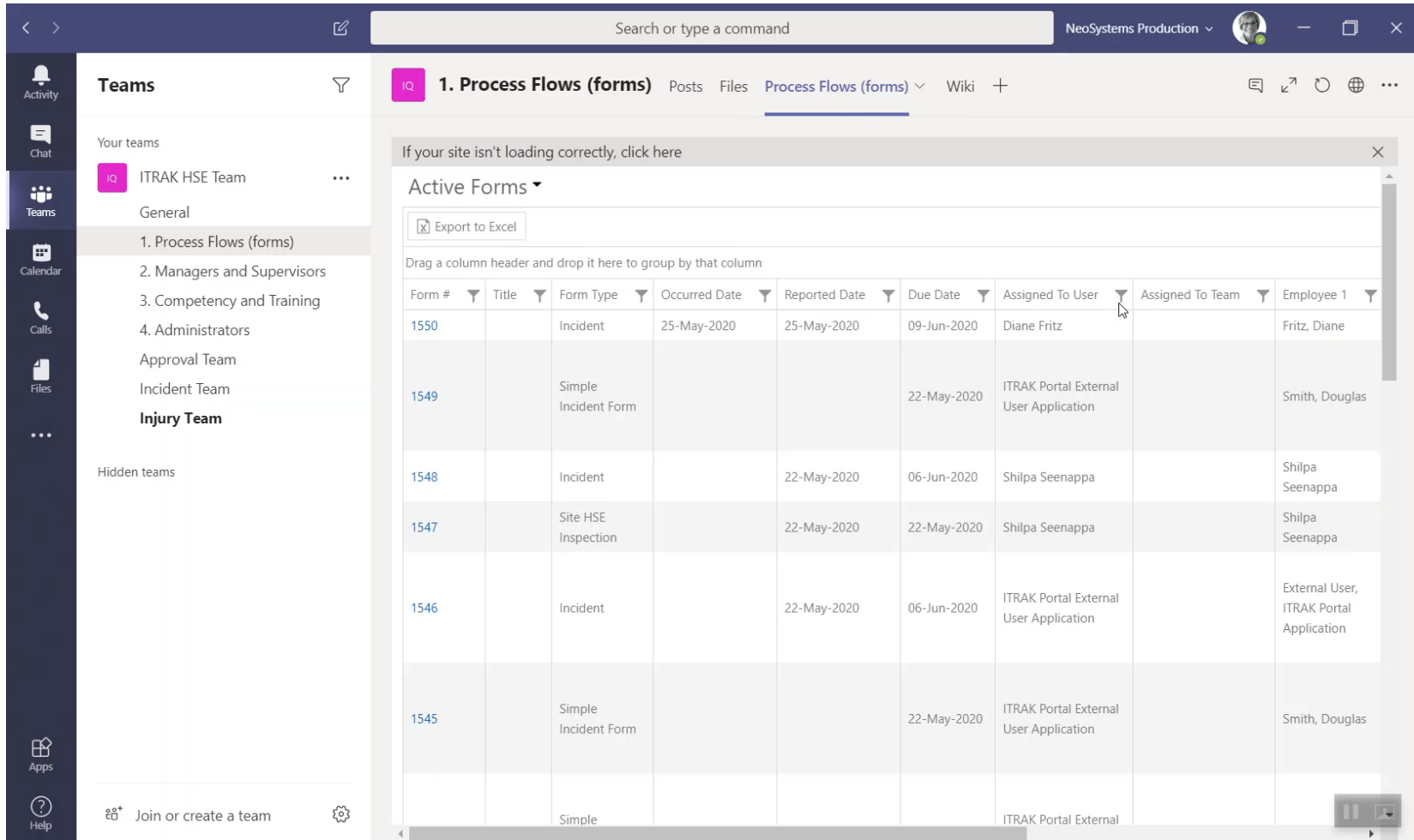
ITRAK HSE Team

- General
- 1. Process Flows (forms)
- 2. Managers and Supervisors
- 3. Competency and Training
- 4. Administrators
- Approval Team
- Incident Team
- Injury Team

Hidden teams

Join or create a team

Process Flows (forms) channel (video)



Search or type a command

NeoSystems Production

Teams

Your teams

- ITRAK HSE Team
- General
- 1. Process Flows (forms)
- 2. Managers and Supervisors
- 3. Competency and Training
- 4. Administrators
- Approval Team
- Incident Team
- Injury Team**

Hidden teams

Join or create a team

1. Process Flows (forms)

Posts Files Process Flows (forms) Wiki +

If your site isn't loading correctly, click here

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
1550		Incident	25-May-2020	25-May-2020	09-Jun-2020	Diane Fritz		Fritz, Diane
1549		Simple Incident Form			22-May-2020	ITRAK Portal External User Application		Smith, Douglas
1548		Incident		22-May-2020	06-Jun-2020	Shilpa Seenappa		Shilpa Seenappa
1547		Site HSE Inspection		22-May-2020	22-May-2020	Shilpa Seenappa		Shilpa Seenappa
1546		Incident		22-May-2020	06-Jun-2020	ITRAK Portal External User Application		External User, ITRAK Portal Application
1545		Simple Incident Form			22-May-2020	ITRAK Portal External User Application		Smith, Douglas
		Simple				ITRAK Portal External		

Managers and Supervisors channel (video)

Search or type a command

NeoSystems Production

Your status is set to do not disturb. You'll only get notifications for urgent messages and from your priority contacts. [Change settings.](#)

2. Managers and Superv... Posts Files Power BI Process Flows (forms) Employees 5 more + Org

Response Approve
Comments Please proceed with the investigation
Approval Approval for High Risk Incident

Diane Fritz (diane.fritz@itrak365.com) used Power Automate to send this notification. [Learn more](#)

Reply

Flow 4:12 PM

Approvals | Power Automate

Approval for High Risk Incident

Requested by Diane Fritz <diane.fritz@itrak365.com>

Date Created 05/25/2020 20:12:02
Link [View Incident in ITRAK](#)

Incident 1072 has been identified with a Risk of 16, please review the details to confirm they are sufficient and approve or reject the Incident.

[Approve](#) [Reject](#)

Diane Fritz (diane.fritz@itrak365.com) used Power Automate to send this notification. [Learn more](#)

Start a new conversation. Type @ to mention someone.

Join or create a team

Competency and Training channel (video)

The screenshot displays the Microsoft Teams application interface. On the left is a dark sidebar with navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main area is divided into two panes. The left pane, titled 'Teams', shows a list of teams under 'Your teams' and 'Hidden teams'. The 'ITRAK HSE Team' is selected, and its channels are listed: 'General', '1. Process Flows (forms)', '2. Managers and Supervisors', '3. Competency and Training' (which is highlighted), '4. Administrators', 'Approval Team', 'Incident Team', and 'Injury Mgr Team'. The right pane shows the selected channel, '3. Competency and Training'. At the top of this pane is a search bar and a status bar indicating 'Your status is set to do not disturb'. Below this is a header for the channel with tabs for 'Posts', 'Files', 'Training Tasks', 'Training', and 'Empl Reporting Team'. The main content area of the channel displays three messages, all from 'Diane Fritz', detailing channel name changes: 'Procedure Competency' to '2. Procedure Competency', '2. Procedure Competency' to '2. Competency and Training', and '2. Competency and Training' to '3. Competency and Training'. The messages are dated 'May 21, 2020'. At the bottom of the interface is a text input field with the placeholder 'Start a new conversation. Type @ to mention someone.' and a row of icons for attachments, emojis, GIFs, and other communication tools.

Search or type a command

NeoSystems Production

Your status is set to do not disturb. You'll only get notifications for urgent messages and from your priority contacts. [Change settings.](#)

3. Competency and Trai... Posts Files Training Tasks Training Empl Reporting Team 4 more +

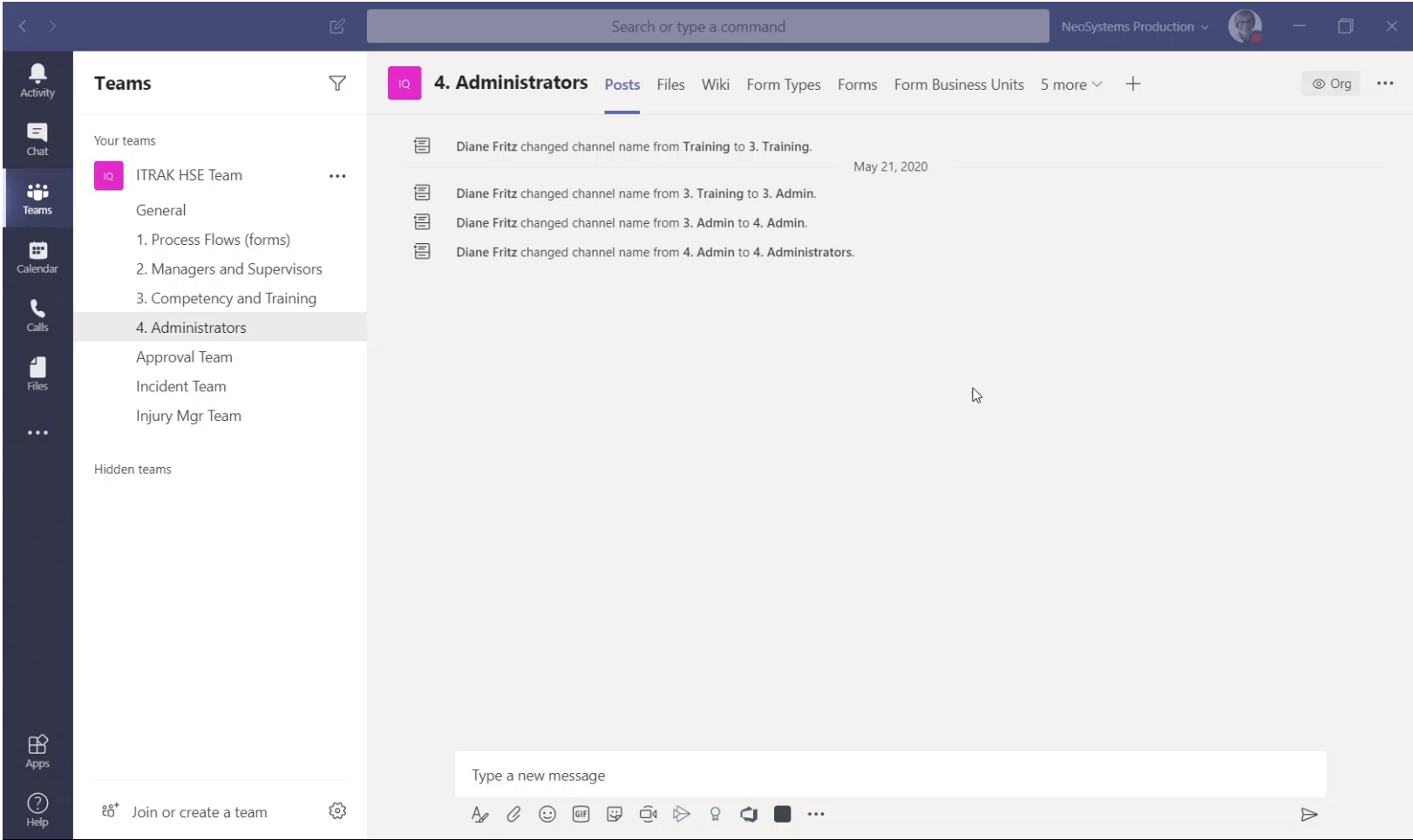
Diane Fritz changed channel name from Procedure Competency to 2. Procedure Competency.
May 21, 2020

Diane Fritz changed channel name from 2. Procedure Competency to 2. Competency and Training.

Diane Fritz changed channel name from 2. Competency and Training to 3. Competency and Training.

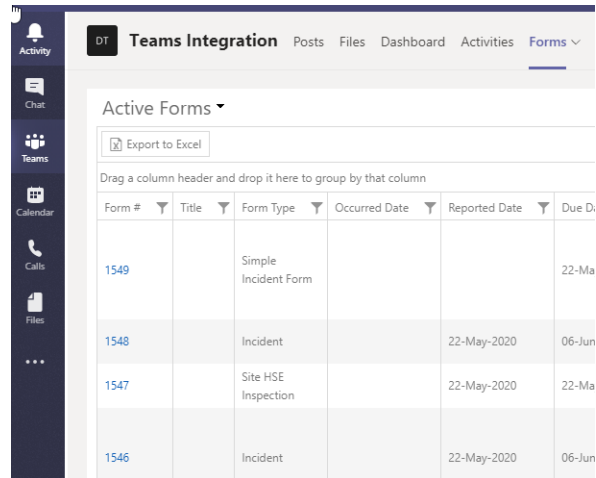
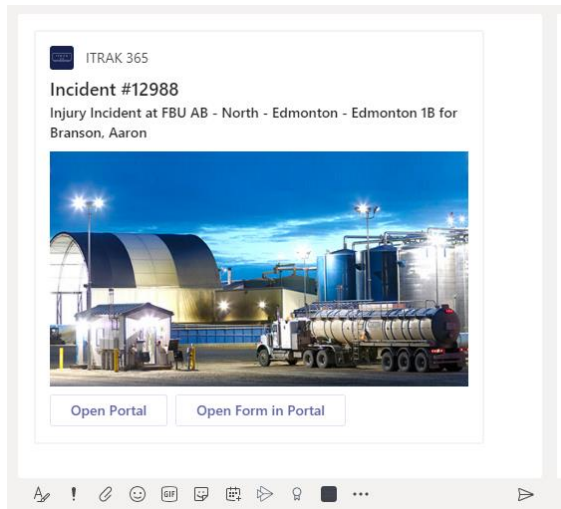
Start a new conversation. Type @ to mention someone.

Administrators channel (video)



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



DT **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

This screenshot shows the ITRAK Teams Integration interface. It features a dark sidebar with navigation icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main content area has a header with 'DT Teams Integration' and tabs for Posts, Files, Dashboard, Activities, and Forms. Below the header, there's a section for 'Active Forms' with an 'Export to Excel' button and a table of forms. The table has columns for Form #, Title, Form Type, Occurred Date, Reported Date, and Due D. The table contains four rows of form data.

Where ITRAK and Teams are goingoft Teams Integration

ITRAK Portal

ITRAK

Activities

Forms

Events

Training

Documents

Procedures

Competency

Company

Team

Personal

+ ADD

VIEW

Health and Safety Incident

MB

SAFE Companies - Audit

Inspections

ITRAK Portal embedded in Teams

Search or type a command

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	

View & Update Incidents and other HSE information directly in teams...

Questions?

If we do not get an opportunity to respond to your question, we will follow up.

A pdf of the presentation will be in the chat window.

SAFETECH Synergy Schedule! Upcoming Sessions!

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





2020

SAFETECH *Synergy*

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



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