2020

SAFETECH Synergy

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

Presented by ITRAK

Opening Keynote & State of the Nation: ITRAK 365, Safety and Microsoft

Trevor Nimegeers
Managing Director
ITRAK 365 (formerly NeoSystems)

ISV Connect Premier Tier Partner

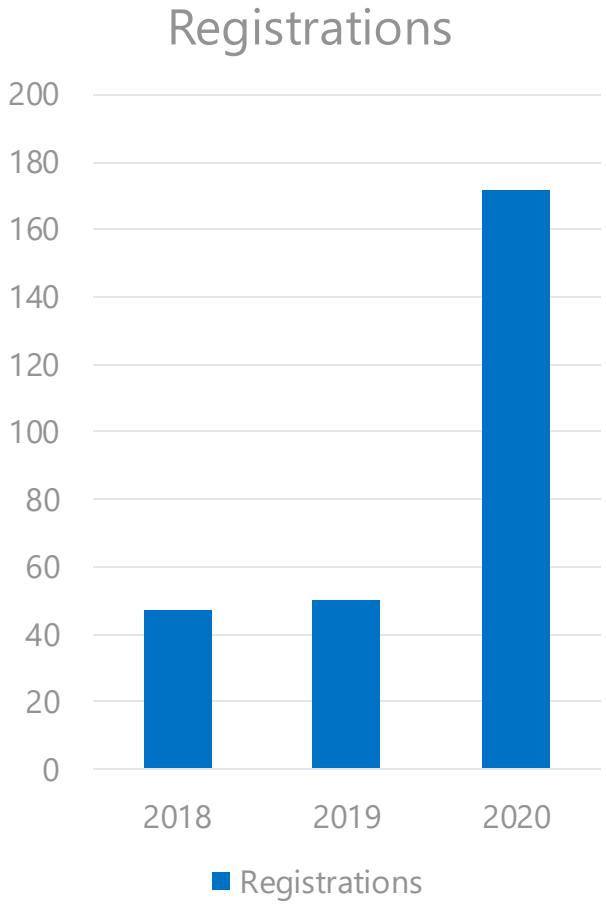
ITRAK 365

Microsoft Dynamics 365 Certified

Microsoft

www.useitrak.com

Welcome to the 3rd Annual Safetech Conference



- 1st year of Virtual Format, 3rd annual
- **22 sessions,** 3x the number from last year
- More new product announcements & innovation that ever before
- Participation from over 50 companies across 20+ countries, ranging from SMBs to large enterprise
- More engaged content between live-sessions, recorded content, social media interaction than in our companies history!

Opening Keynote: 3 Parts

1 **The HSE Industry Challenge**

2 **The ITRAK 365 Approach**

3 **Roundtable: Customers Stories**

Industry & Lifestyle Disruption

Travel

Retail

Government

THE WEEK

Facebook, Twitter, Shopify: Why companies think work from home is here to stay

2 days ago

Commercial Real Estate

Higher Education

"Demand destruction like you've never seen"… "what happens when 20-30% of students don't show up this fall?"

Professor Galloway

1

HSE Industry Challenge

Trends, Challenges and Opportunities in the Safety and Technology Space

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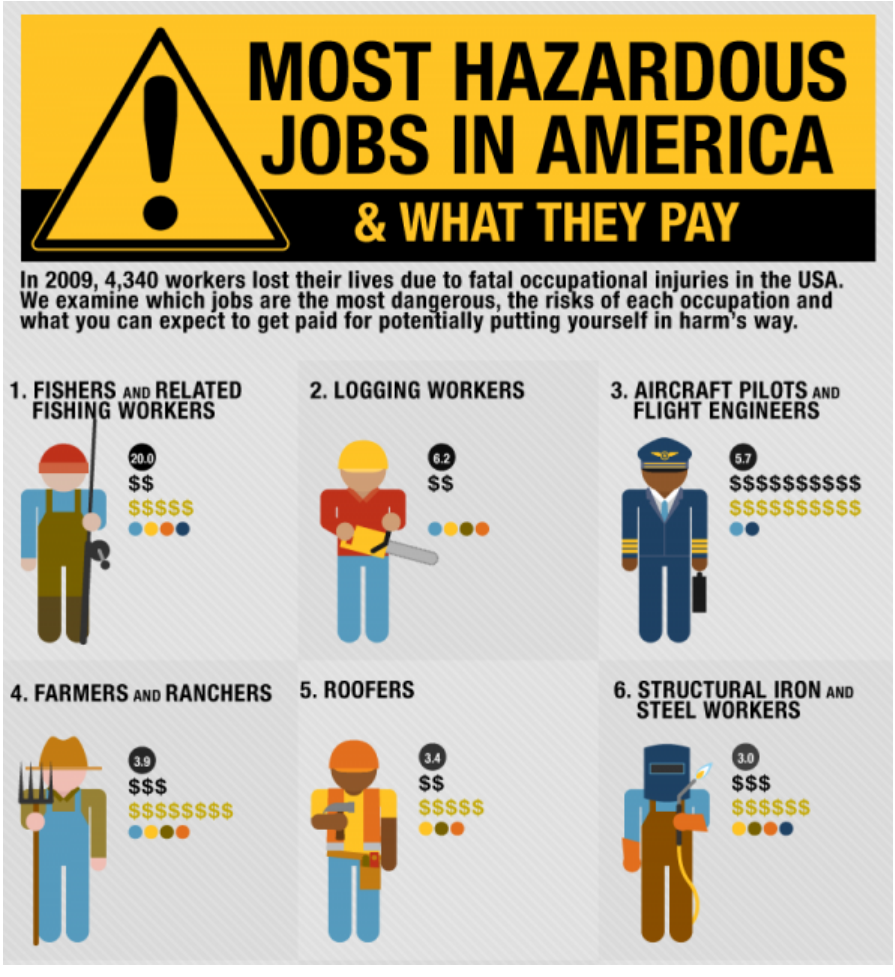
The Role of HSE is changing…

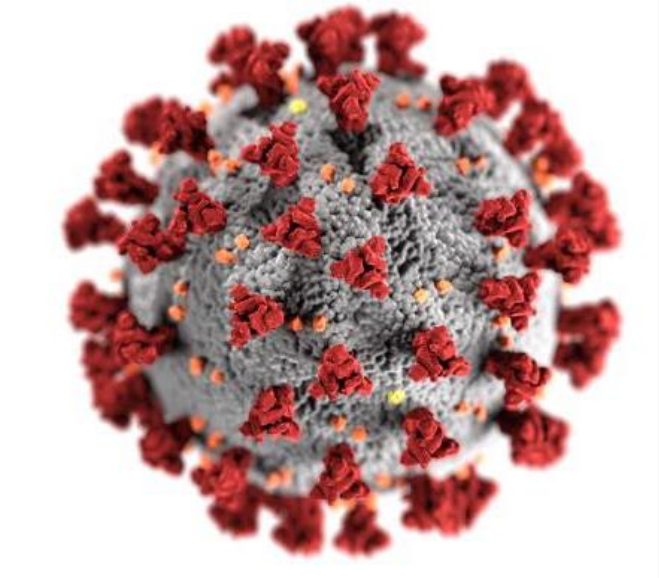
- No longer just about hazards in the field
- Office worker and professionals are now face risk that requires managing
- The audience for HSE has exploded in size

Here is where we started… and learned



The new reality…

… the hazards are not so visible…

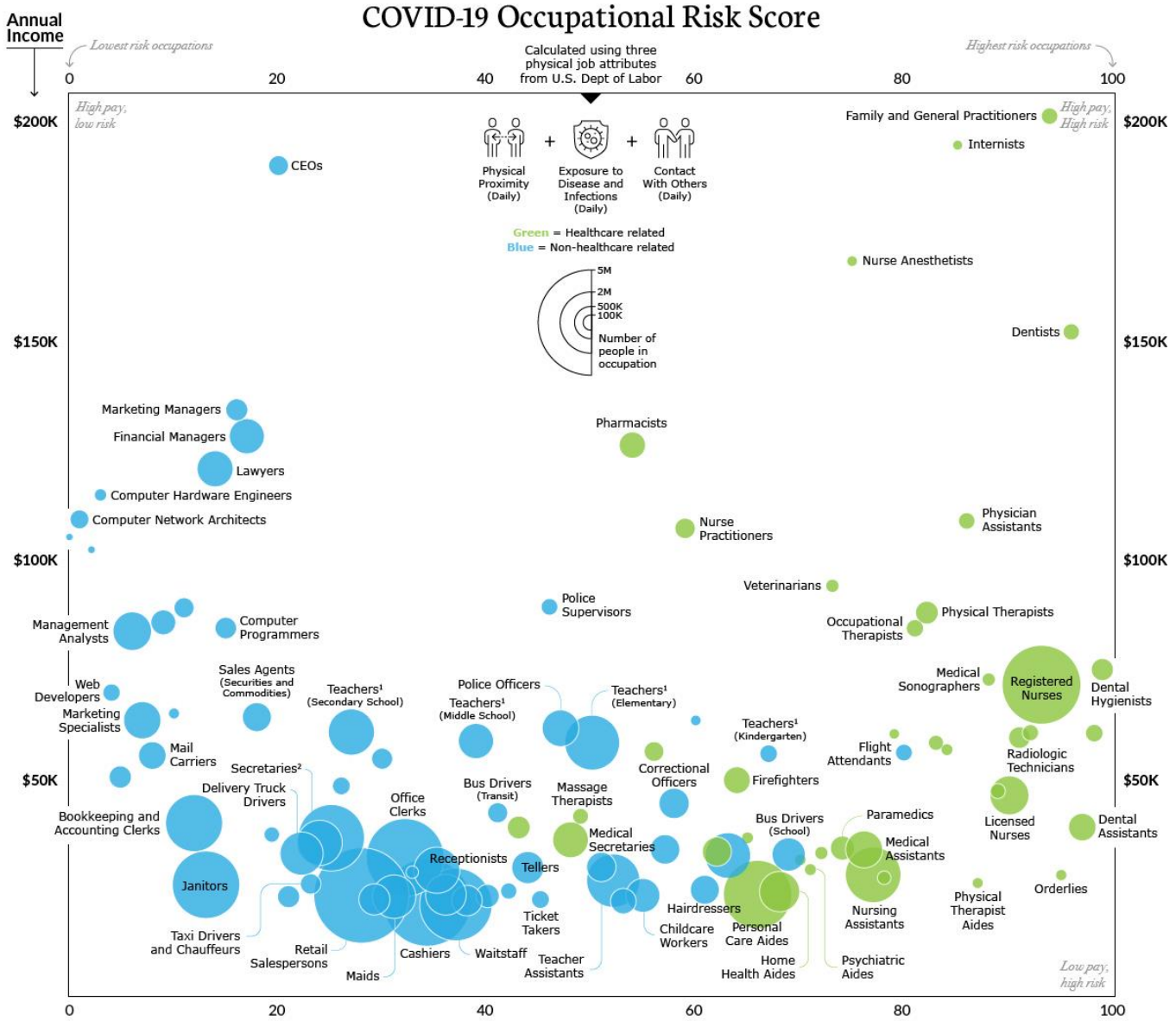


… nor are the consequences.

HSE's new "customers"...

Health Care Related

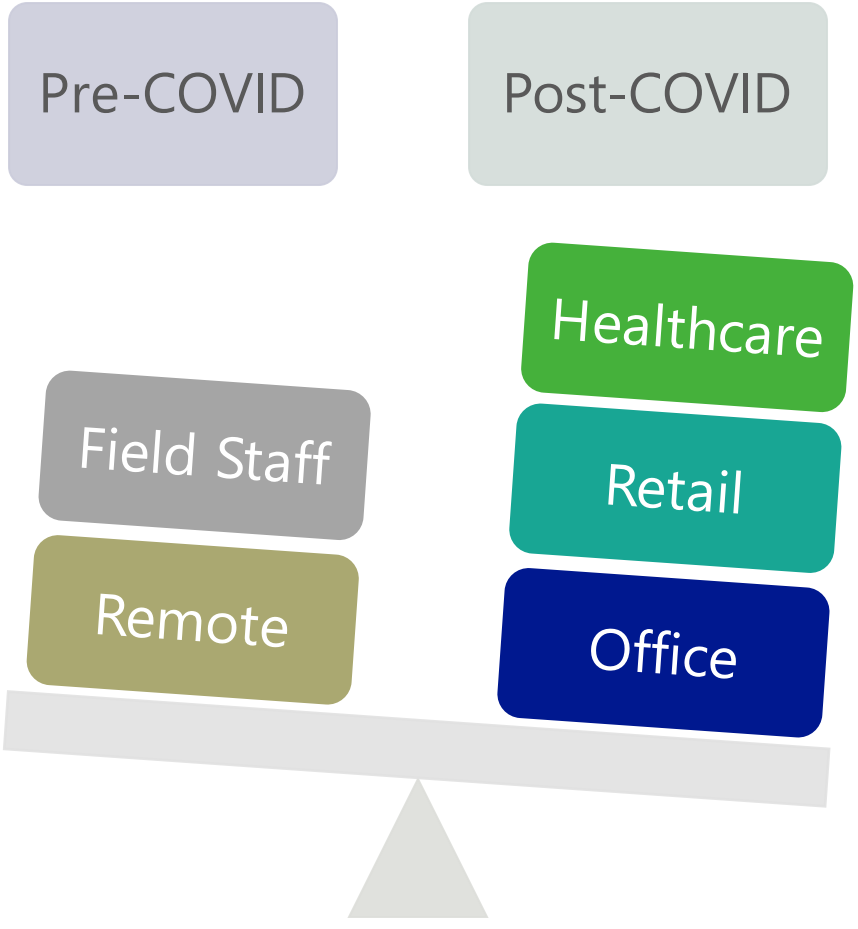
Non - Health Care Related



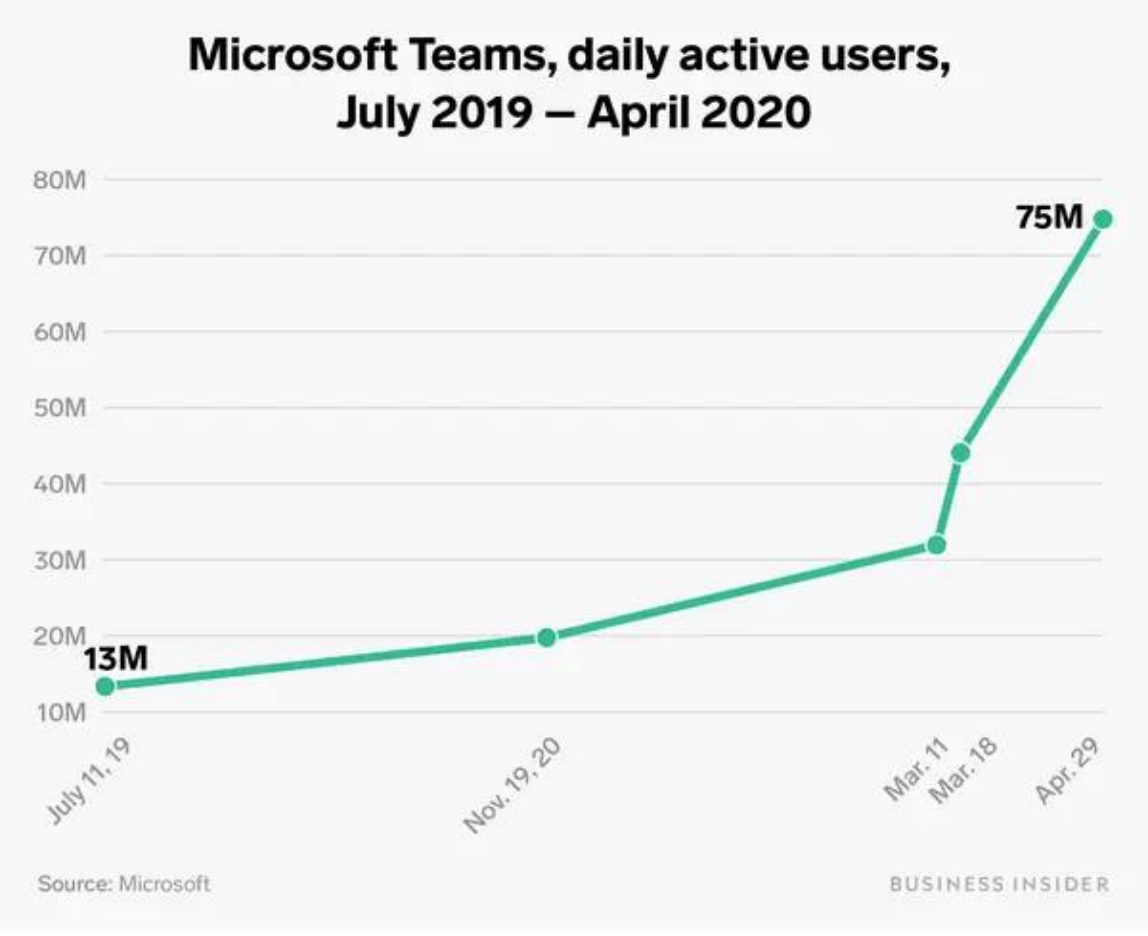
Source: US Dept of Labor, O*Net database [1]Excluding Special Needs [2]Except Legal, Medical and Executives

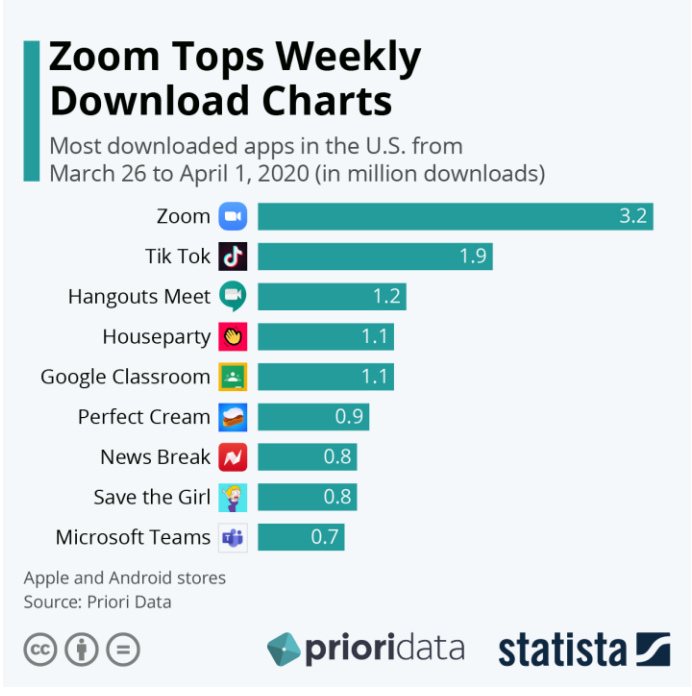
Visualcapitalist.com

Shift In Risk



How we work is changing…





Accelerated Change

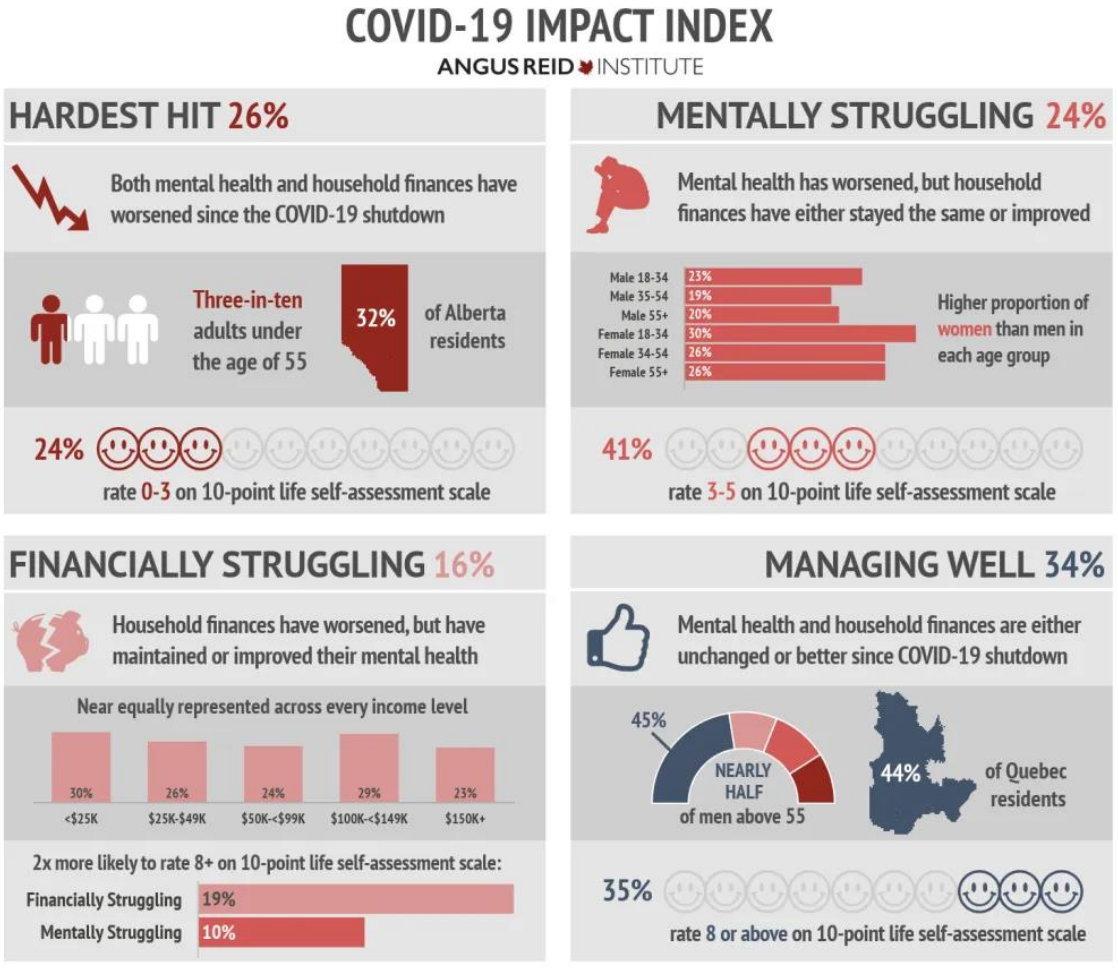
"We've seen two years' worth of digital transformation in two months."

Satya Nadella
Microsoft CEO

Mental Health

Half of Canadians (50%) report a worsening of their mental health, with one-in-ten (10% overall) saying it has worsened "a lot".

Angus Reid Report



As the HSE industry, we need to …

1. Respond with **Flexibility & Speed**

   No one knows how this is going to playout and you need to be able to adapt quickly, responding to new requirements and changes.

2. Build for **Scale** (larger audiences)

   You need to have a way of supporting with new stakeholder groups and employees where, when and how they work.

3. Engage **Community** Best Practices

   Use the expertise, knowledge and experience of other community members; accelerate your learning and ability to implement.

The HSE Rally Cry?

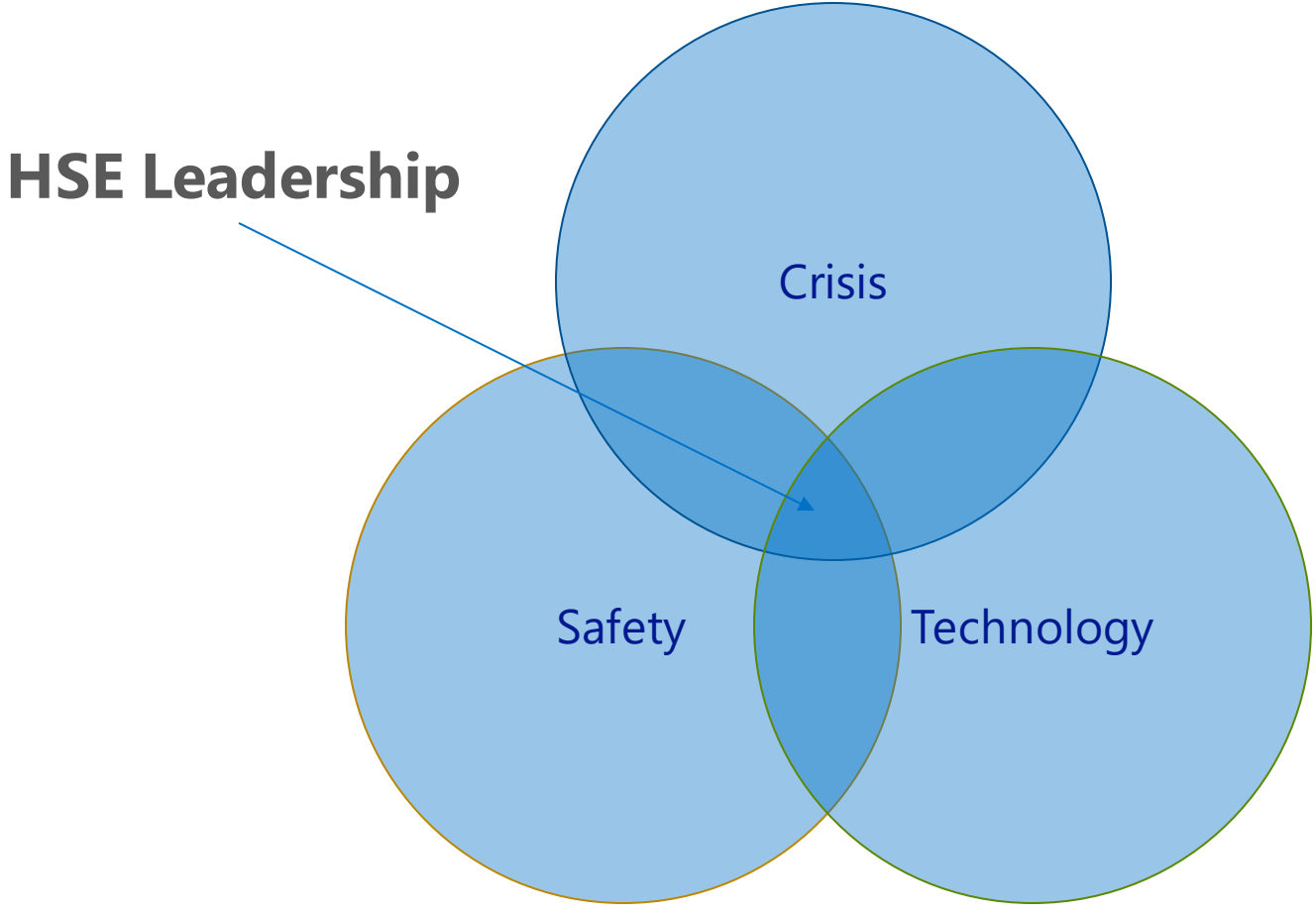
Is this the time for HSE to show process, innovation and leadership?

"At no time before in history has health and safety been in the minds of more people; the opportunity for HSE to lead is here."

"COVID-19 is the rally cry for HSE professionals, its the opportunity to take what was learned from hazardous industries and demonstrate how it applies to all workers"

Trevor Nimegeers
Managing Director
ITRAK 365

Intersection of Massive Trends



Welcome from Microsoft

Cecilia Flombaum
Worldwide Lead – Business Application Partners

Microsoft

2

The ITRAK 365 Approach

What investments has our team been making to align

ISV Connect Premier Tier Partner

ITRAK 365
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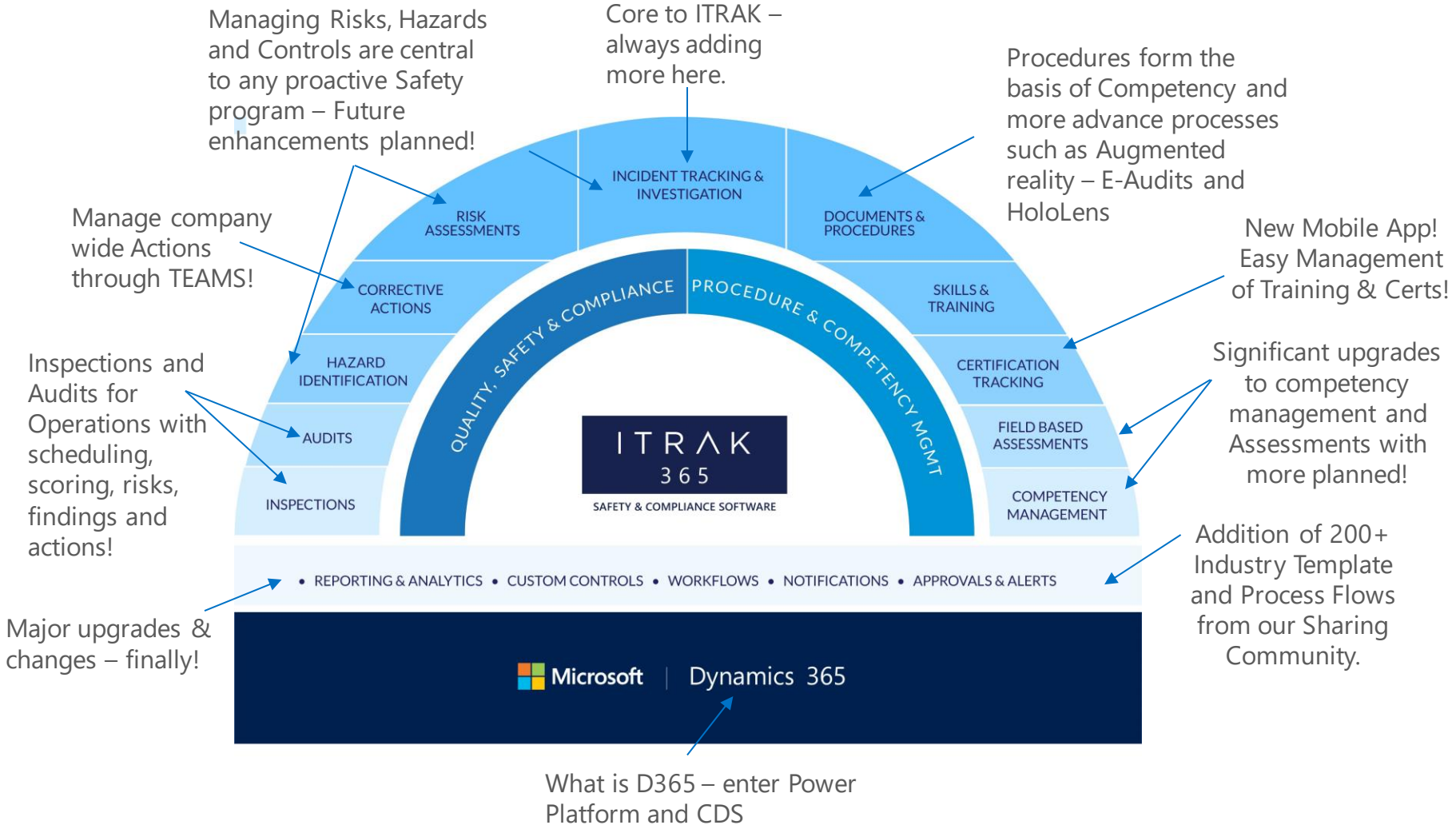
Microsoft

The ITRAK 365 Platform

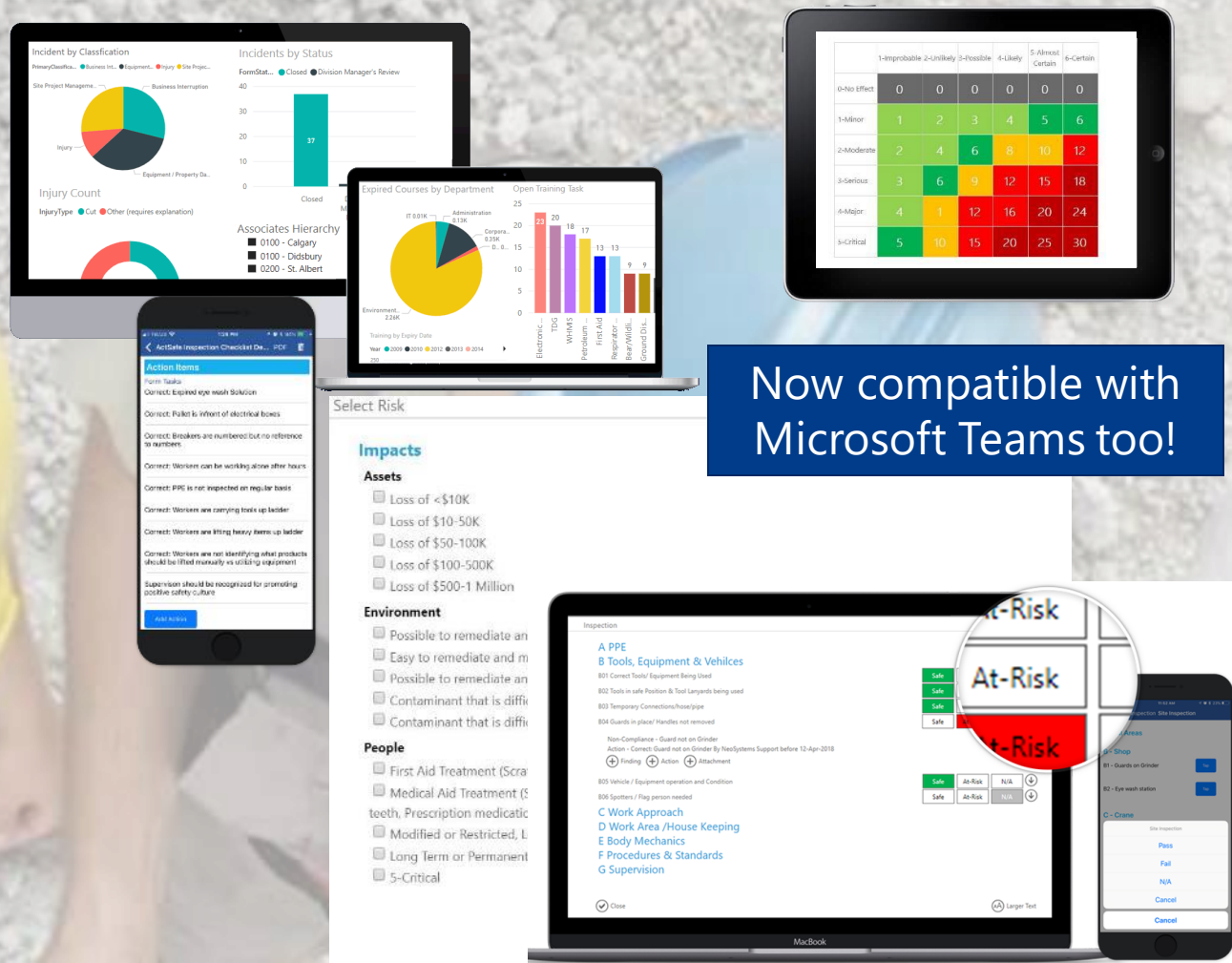


ITRAK 365 User Interfaces

Web Portal
Browser interface for most ITRAK 365 users

Mobile Application Interface
For connected and/or disconnected field users with IOS, Windows & Android devices

Admin Interface
Define forms, fields, workflows, leverage 130+ QHSE controls (inspections, risk assessments, corrective actions & much more)



Now compatible with Microsoft Teams too!

Extending ITRAK with Augmented Reality and HoloLens

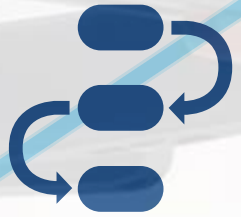
ITRAK 365
SAFETY & COMPLIANCE SOFTWARE

- ✓ Authors procedure
- ✓ Facilitates procedure review and field assessment
- ✓ Provides training and competency tracking

Microsoft HoloLens

- ✓ Provides immersive and interactive training experience

ITRAK Procedure



D365 GUIDES

Microsoft Dynamics 365

- ✓ Facilitates all configurations and houses collected data for entire process

- ✓ Transforms the ITRAK procedure into HoloLens friendly learning material

What do paper forms have to do with ITRAK 365?

+

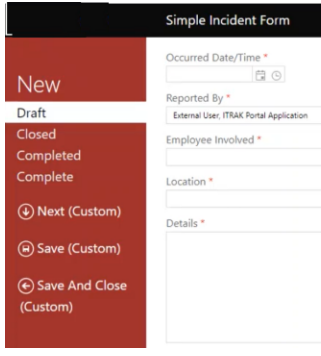
+

Power Automate

RPA

Robotic Process Automation

=



A completed ITRAK Form

See AI Builder Session with Tian and Tom @ 1:00 Thursday to hear more!

[Demo Link Video]

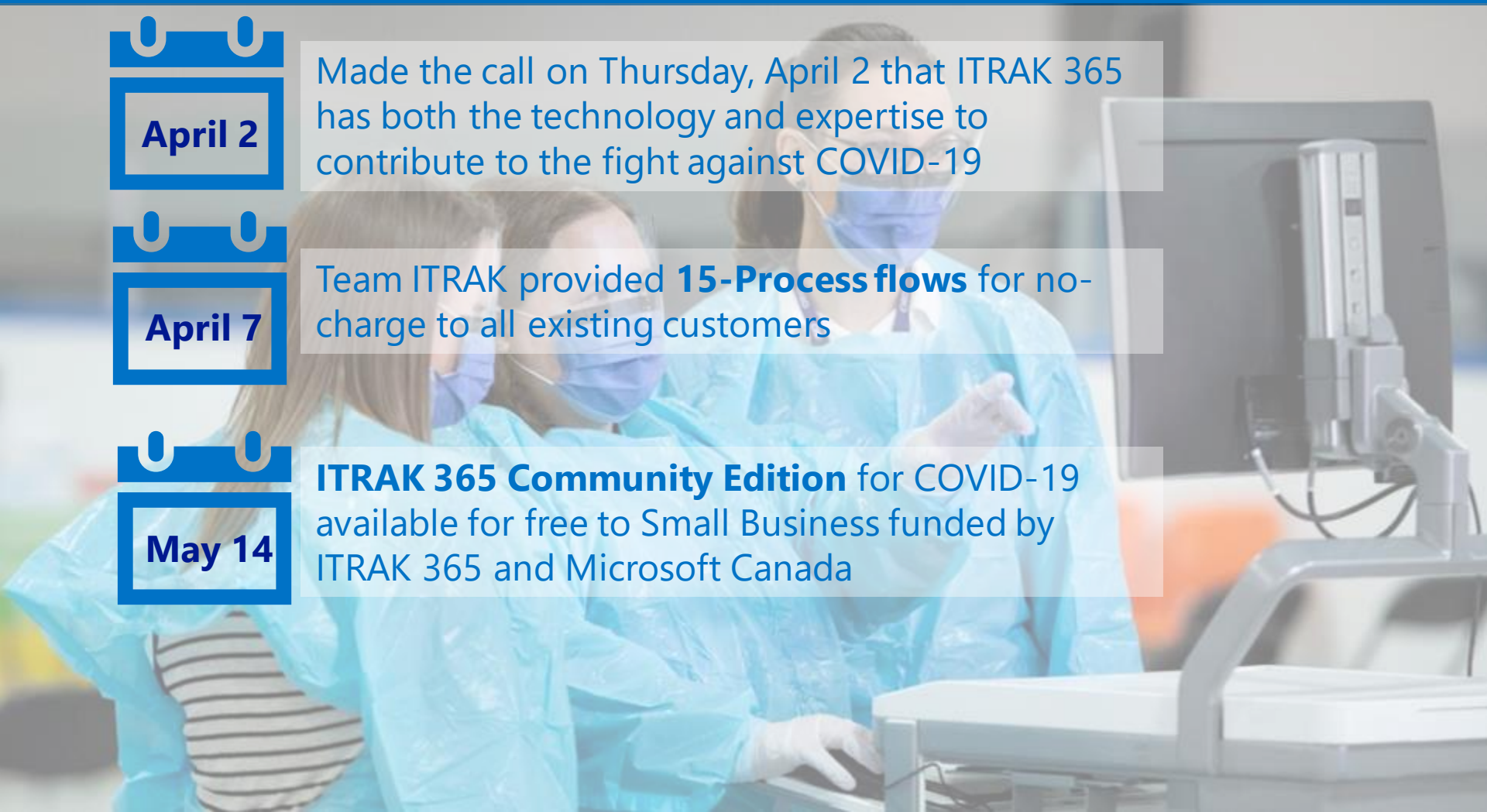
ITRAK 365
SAFETY & COMPLIANCE SOFTWARE

Community of Process Flows shared among our Customers

- Change Management Process
- COR eAudit tool for Forestry
- Smart Form Qualifiers
  - Injury Classification (FA, MA, LTI, WO)
  - Reportable to WCB an or OHS
  - Reportable Environmental spill by Province (Hydrocarbon)
  - Reportable spill – TDG
  - Reportable to RCMP
  - Reportable to company insurance
  - PSI (Potentially Serious Incident)
  - CAPP injury Qualifier (Canadian Association of Petroleum Producers)
  - Interprovincial water run-off
- Subcontractor Management Qualification Process
  - Based on scope and risk of project
- Workplace observation form
  - Combining unsafe act, hazard ID, high five
  - Worker observation
  - Positive interactions
- Incident Classifications to reflect new legislation changes
  - Pulling Near Miss out of Incident form
  - Actual Risk drive Near Miss Classification
- Community Compliance
  - Noise
  - Odor
  - Dust
  - Driving Compliant
- C-ring Checklist
- Modified work
- Onboarding cert
- Competency checklist
- Sign off boarding vessels
- Training gap assessment
- Corrective action log
- Monthly KPI
- Focus Audits
- Potable water
- Portable fuel tanks
- Electrical grounding
- Noise
- Welding
- Working at heights
- Documentation
- Permits
  - LOTO
  - Hot Work
  - Excavation
  - Working at heights
- Faller
  - Training
  - Assessments
  - Competency
- Mainline Isolation Valve
- Safety Rep Audit
- Contractor field Audit
- Non-compliance report
- Surface run-off release form
- Confidential forms
  - Violence and Harassment
  - Medical evaluation form
  - Respiratory protection use assessment
  - Discipline

List of Industry Forms

COVID-19 – Answering the Call



April 2

Made the call on Thursday, April 2 that ITRAK 365 has both the technology and expertise to contribute to the fight against COVID-19

April 7

Team ITRAK provided **15-Process flows** for no-charge to all existing customers

May 14

ITRAK 365 Community Edition for COVID-19 available for free to Small Business funded by ITRAK 365 and Microsoft Canada

COVID-19: Community Edition Outcomes

Fifteen (15) complete Process Flows targeting the following:

1. Providing employees standardized **process to report** on COVID-19 activities
2. Give employees tools to help keep **safety** and **wellness** top of mind
3. Providing employers with a **centralize visibility of COVID-19 related activities and actions**
4. Identify **areas of risk** related to employees and overall business continuity
5. Share **best-practice** approaches for handling COVID-19 across companies

ITRAK 365

Community Edition

Contact and Location Tracing of Field Workers

ITRAK 365
SAFETY & COMPLIANCE SOFTWARE

06/04/2020 20/05/2020

Employee Name	Processess Submitted
Anderson, Elizabeth	1
Lopez, Patricia	4
Safety, Fire and Flame	3

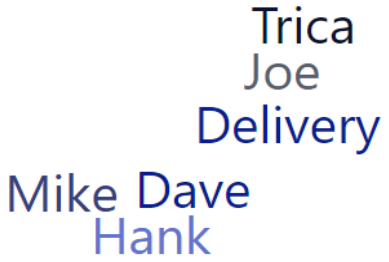
Employee Name

Search

- Anderson, Elizabeth
- Lopez, Patricia
- Safety, Fire and Flame

Employee Interaction Heat Map

Non - Employee Interaction Heat Map



Entered By	Reported Date	Supervisor Name	Did you have any concerns/comments/suggestions about COVID exposure today?	Status	Form Link
Safety, Fire and Flame	19/05/2020 4:40:00 PM			Draft	
Anderson, Elizabeth	20/04/2020 4:33:00 PM	Thomas, Jennifer	Nothing COVID related happened	Closed	
Lopez, Patricia	06/04/2020 11:41:00 AM	Safety, Fire and Flame	None	Closed	
Lopez, Patricia	07/04/2020 11:46:00 AM	Safety, Fire and Flame	None. Didn't leave the house	Closed	
Lopez, Patricia	08/04/2020 11:47:00 AM	Safety, Fire and Flame		Closed	
Lopez, Patricia	09/04/2020 11:48:00 AM	Safety, Fire and Flame	Minor. Quick meeting with co-workers	Closed	
Safety, Fire and Flame	20/05/2020 1:41:00 PM	Mobile, Fire and Flame	No	Closed	
Safety, Fire and Flame	20/05/2020 2:17:00 PM	Lopez, Patricia		Closed	

ITRAK 365 COVID-19 Process Flows *Launched April 7, 2020*

Process	Audience	Frequency	Purpose
COVID-19 Business Continuity Plan	Company HSE/ Management	Monthly	Checklist for business impacts and actions that an organization should implement for pandemics or epidemics
COVID-19 Operational Impact Assessment (WIP)	Company HSE/ Management	As needed	Process and inspection for determining operational impact with regards to worker illnesses
COVID-19 Cleaning Checklist	Field Workers	As needed	Checklist to help with the proper cleaning and disinfecting of the worksite
Disinfectant Practices Audit	Field Workers	As needed	Ensuring review and approval of disinfectants and their intended application
COVID-19 Pre-Work Assessment and Monitoring	Field Workers	Every Day	Daily worker assessment to be completed before being allowed to go into work
Daily Interaction Log	Field Workers	Every Day	Recording who and where workers have physically interacted with for tracing purposes

ITRAK 365 COVID-19 Process Flows Continued *Launched April 7, 2020*

Process	Audience	Frequency	Purpose
Daily Check In	Home Worker	Every Day	Monitoring location, health and wellness of remote employees
Weekly Personal Workspace Inspection	Home Worker	Weekly	Inspection to help verify the home workspace is adequate
Alternate Work Location Request	Home Worker	As needed	Approval request for remote work (or another location)
Travel Request	Field Workers	As needed	Approval request for company travel
Daily Safety Meeting	Company HSE/ Field Workers	Every Day	Daily Safety Meeting with an Emergency Response section
Incident Report	Any Worker	As needed	Reporting an incident (environmental, MVI, Injury, Exposure, COVID-19)
Quick Action	Any Worker	As needed	Allows any worker to submit an action
Support Request	Any Worke		(technical, feedback, changes, etc.)

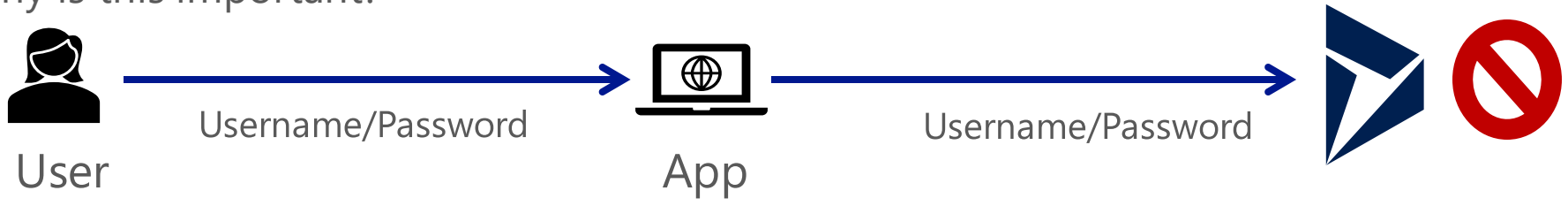
See more at the ITRAK 365 COVID-19 Response Suite with Darren today @ 1pm

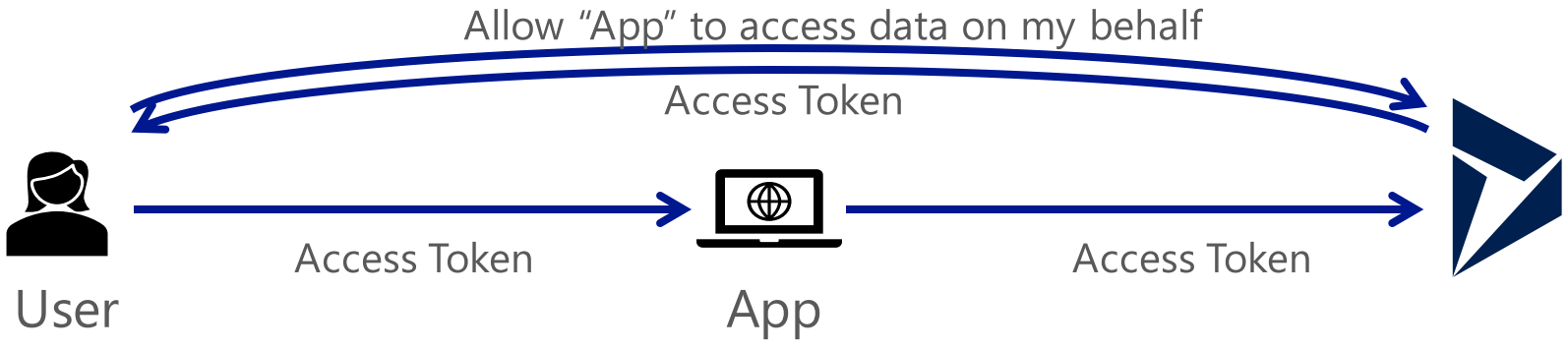
ITRAK 365 Modern Authentication

See more at the ITRAK 365 Enhancements with Melik today @ 1pm

- OAuth 2.0 authentication – modern protocol which uses tokens to authenticate
- MFA/2FA - Multi-factor authentication.
- SSO (Single sign-on) - users sign in once with one account instead of signing in to each application they launch

Why is this important?

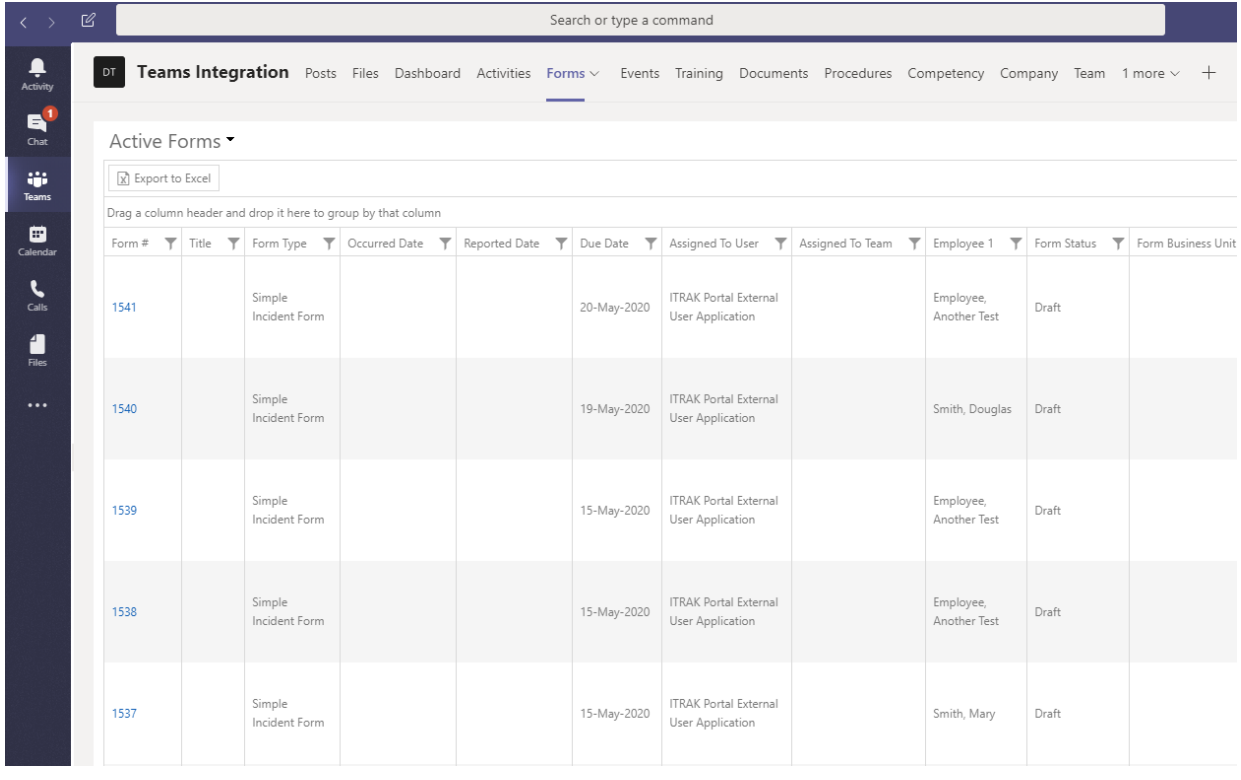




Officially Announcing: ITRAK 365 inside Microsoft Teams!!

ITRAK Portal

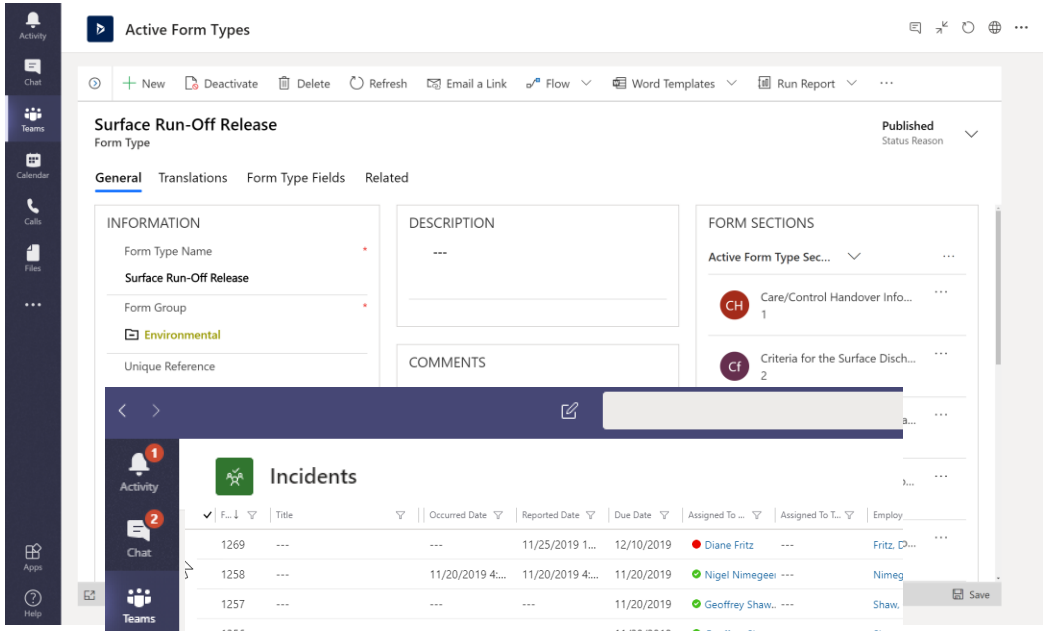
ITRAK Portal embedded in Teams

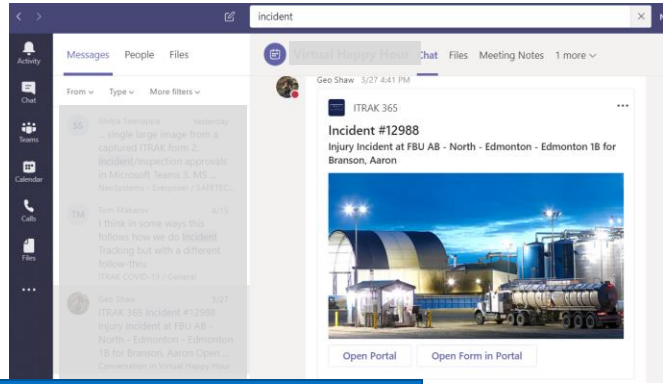


View & Update Incidents and other HSE information directly in teams…

Extend your reach - Microsoft Teams Integration

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





Quickly reference ITRAK incidents etc in chat with hero cards

Also:

- Post notifications to teams
- Author ITRAK Forms in Teams

ITRAK 365 – Moving from disjointed pieces, to one window with MS Teams

Old World

Browser

Dynamics

PowerBI

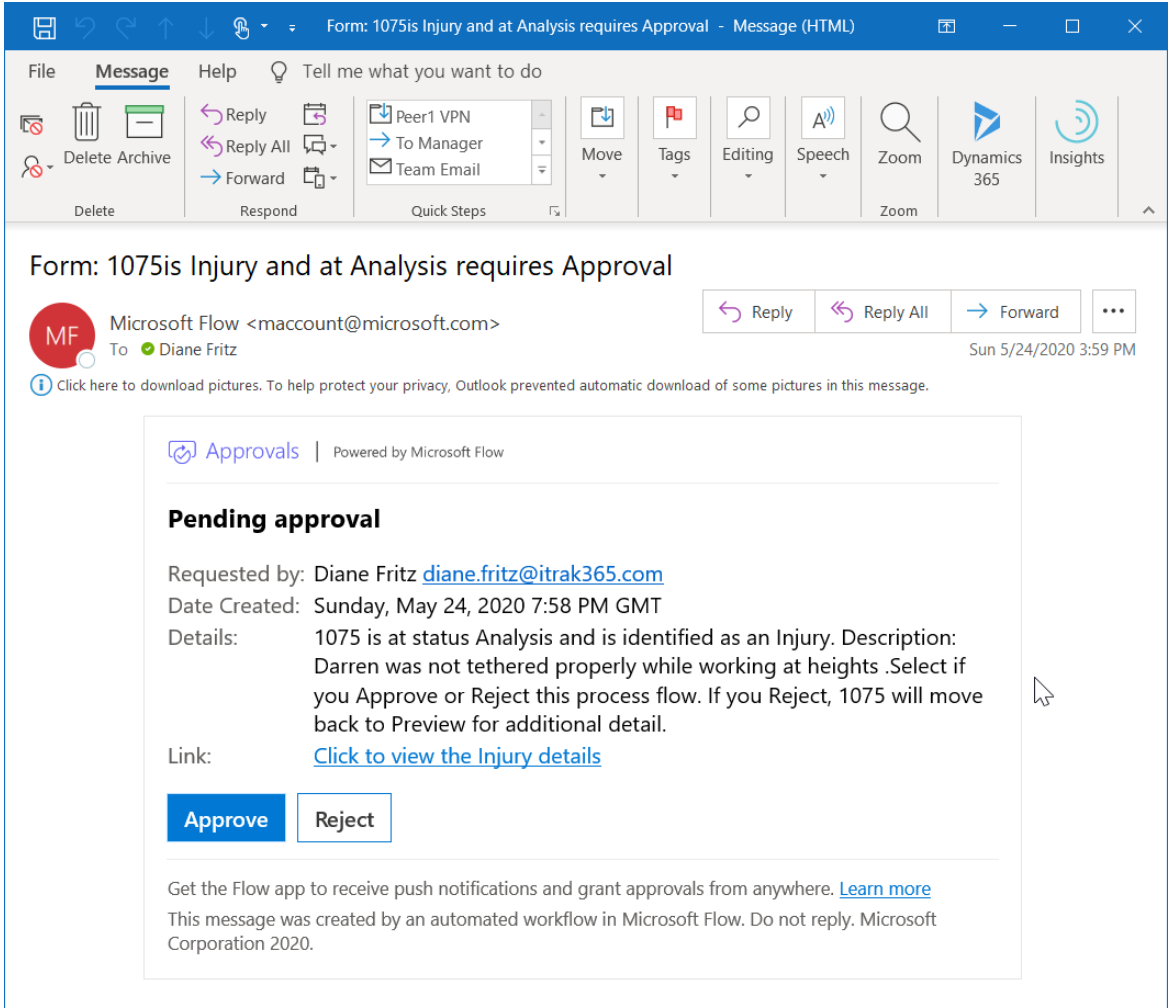
Teams

Email/Outlook

New World

TEAMS & Channels

A new way to do approvals! Anywhere!



Demo: Teams Integration

Melik Borhot – ITRAK Development Manager

See more all the details of ITRAK 365 and Microsoft Team Integration at 1:45 pm today.

ITRAK 365 & Teams Demo

Microsoft Teams Integration

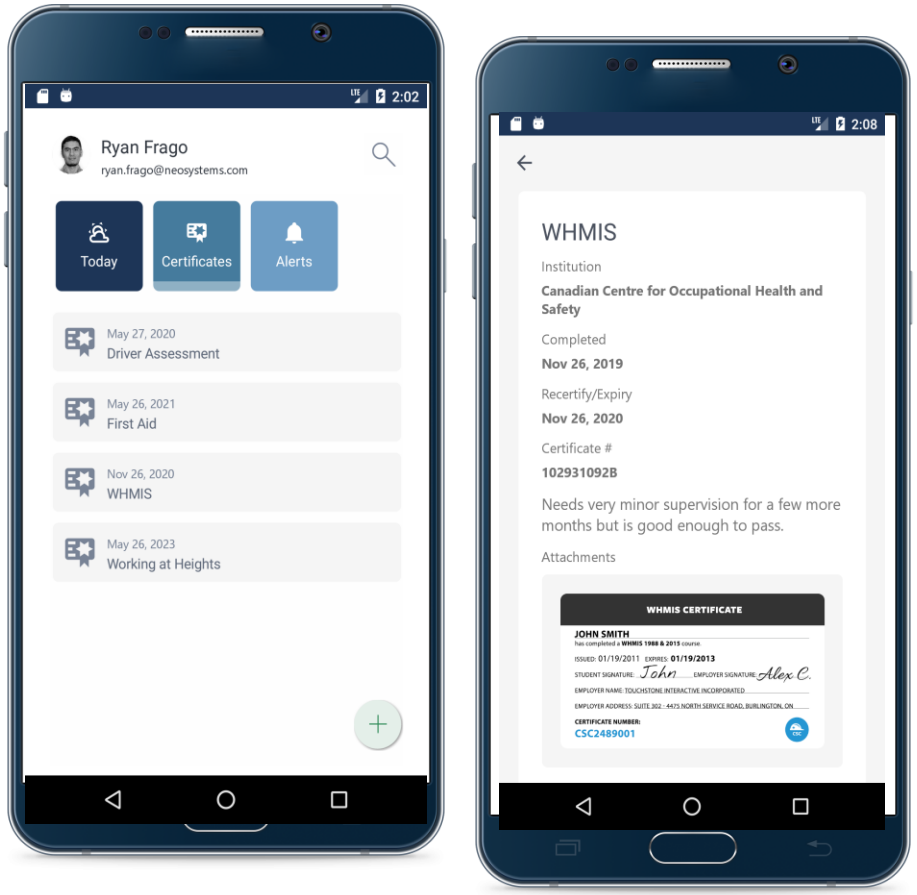
- Teams, Channels and ITRAK
- Approvals – via Teams and Email
- Teams Cards for looking up ITRAK
- Single Sign of between ITRAK and Teams

ITRAK 365 Training App

ITRAK 365 Mobile Training App!

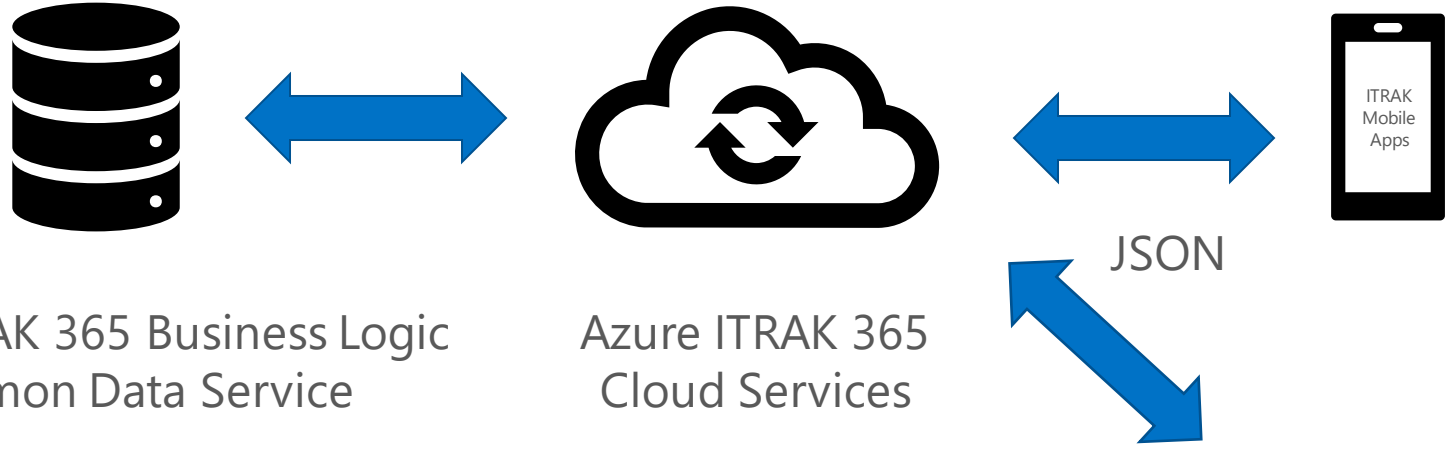
The training app is a new tool for companies to:

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



Publishing and ITRAK 365 API… for your apps

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

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    "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",
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    "attachments": [ "ec961175-5d44-4176-9abc-eae80d3c6bda", "ec961175-5d44-4176-9abc-eae80d3c6bcc" ]
  }
}
```

Version 1 – providing the base schematic for API for consideration in your applications.
Version 2 – TBD – feedback based

Saying goodbye to the past…

~~NEOSYSTEMS~~

The NeoSystems names is being phased out over time, we are now 110% about ITRAK 365!

The Challenge: We ourselves are still adjusting and we need your help learning to stop using it. For every time we say "Neo" or "NeoSystems" please type ITRAK 365 in the chat window.

Your Help Needed: For every instance of ITRAK 365 in chat we'll donate $5 to Food Banks Canada COVID-19 relief efforts.

Food Banks Canada

3

Customers Stories

How has the ITRAK 365 technology and approach provided value

ISV Connect Premier Tier Partner

ITRAK 365
SAFETY & COMPLIANCE SOFTWARE

Microsoft Dynamics 365 Certified

Microsoft

Martin Tanwi

ATTABOTICS

Using since Sept 2019

Aaron Lapointe

Alberta Newsprint Company

Using since July 2017

Stephen Andrade

SECURE energy services

Using since May 2016

Shannon Argent

Using since Jan 2020

VBP+

Patrick Campbell

Scouts Canada

Using since June 2016

SCOUTS CANADA

Holly Barker

BC Forest Safety

Using since March 2018

Going live soon!

Customer Roundtable

Schedule Review

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

Summary Slide

- ✓You heard how we look at the industry and why we think the HSE Rally Cry is happening now.
- ✓You saw how ITRAK is build for **flexibility**, **scale** and **community** sharing.
- ✓You heard about our super-exciting announcement **ITRAK 365 + Microsoft Teams**!
- ✓You saw how we can use Robotic Process Automation (RPA) to **tackle your paper forms**!
- ✓You heard how our community initiatives share best practices across companies and with SMBs in necessary of COVID-19 support with **ITRAK 365 Community Edition**.
- ✓You heard from a few members of a very passion team, answering the Rally Cry for leadership in Safety Industry. We're glad you have joined us on the journey!

Thank you for joining us!

Trevor

Darren

Corinne

Diane

Shilpa

Tom

Michelle

Kassem

Melik

Geoff

Ryan

Milton

Tian

Aaron

2020

SAFETECH Synergy

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

Presented by ITRAK

Thank you!

Please fill out the session survey.

ISV Connect Premier Tier Partner

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Microsoft Dynamics 365 Certified

Microsoft

www.useitrak.com

David Durda

kelt exploration

Stephen Andrade

SECURE energy services

Byron McWhinnie

WAYFINDER THE PROPPANT COMPANY

HSE Roundtable

2020

SAFETECH Synergy

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

Presented by ITRAK

Closing Session: Thank you's, Virtual Drinks and Tom's Mixology Session

Trevor Nimegeers
Managing Director
ITRAK 365 (formerly NeoSystems)

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Trying to Summarize….

- ✓You heard how we look at the industry and why we think the **HSE Rally Cry** is happening now.
- ✓You saw how ITRAK 365 is built for **flexibility**, **scale** and **community** sharing.
- ✓You heard about our super-exciting announcements **ITRAK 365 + Microsoft Teams Mobile Training,** a **ITRAK 365 API** and **RPA for Paper HSE Forms**!
- ✓You participated in roundtable discussions and Q&A with Michelle, myself and others to showcase your ideas about our industry and our technology.
- ✓You received **LOADS** of information and training from my team on how to make ITRAK 365 work for your business.
- ✓Mostly importantly, you heard from **customers and real scenarios where ITRAK 365** is making a difference for business every day.

Conference “Specials”

Power BI + ITRAK 365 SAFETY & COMPLIANCE SOFTWARE

25% off – 4 day
Consulting Package
for Power BI

Book by June 15 by contacting us!

Teams + ITRAK 365 SAFETY & COMPLIANCE SOFTWARE

Watch our Social Media Channels or contact your ITRAK Consultant for more info

Details available next week

Recognizing our ITRAK 365 Hero's

What attributes define an "***ITRAK 365 Hero***" ?

- People that understand ITRAK 365 and its power
- People who translate that power into value for their company
- People who are honest with us about our technology, where it is and where it falls short
- People who are willing to speak up internally about ITRAK and willing to take the "go-live risk"
- People who will help us "shout from the roof tops" about ITRAK 365, providing important references, referrals for new customers

For all these things – but most importantly **your trust in us and your belief in the ITRAK 365 solution**…

From the entire ITRAK 365 team, we appreciate your support, the business and your trust in us and our technology. Thank you!

Paula Aoake
Business Improvement Analyst
EnviroNZ

Shane Burke
Project Manager
EnviroNZ

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Scouts Canada

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Health & Safety Advisor
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IT Mgmt. Professional
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ITRAK 365 HERO'S

Class of 2020

Nastassia Rashid
Cloud Solution Architect
Microsoft

Tomas Zunino
Partner Development Mgr.
Microsoft

Christy Giberson
HSE Analyst & Training
Strike Group

Vladimir Stojic
Info. Systems Analyst
Prica Global Enterprises

Marvin Ing
Manager, Applications
Secure Energy Services

Stephen Andrade
Manager, Heath & Safety
Secure Energy Serv.

Kevin Collins
Business Tools Analyst
Secure Energy Services

Jason Granter
IT Controller
Tacora Resources Inc.

Lincoln Bodner
Business Development
Encore Business Solutions

Mark Garner
Application Analyst
Aurora Cannabis

David Lust
Project Manager
Aurora Cannabis

Holly Barker
Certified Accountant
BC Forest Safety Council

ITRAK 365 Hero “Survival Pack”

- Survival Pack with a few goodies
  - First Aid Pack
  - Tape Measure
  - Stress Helmets (snooze management projectiles)
  - Sticky Pads
  - Tape Measures

Corinne will reach out to get in contact to you so we can get you your survival pack.

ITRAK 365
SAFETY & COMPLIANCE SOFTWARE

Announcing our Raffle Prize Winner

Samsung Galaxy Buds

Stephanie Youngdale

Scout Canada

Referrals – we can use your help!

- Do you know someone who would benefit from HSE and field operations data capture and could make use of ITRAK 365?

- Do you know groups that are searching for help that could utilize **ITRAK 365 COVID-19 Community Edition** (health care facilities, restaurants, grocery stores, other small businesses) ?

- Would you be willing to rate us on Enterprise App Stores like Capterra, G2, Android Play, Apple AppStore or AppSource? (you will receive a gift card for your efforts!)

ITRAK 365 is a small company , with a **big heart** ♥, **big ambitions** and a **global community** of HSE companies who would benefit – we need your help getting to them so we can take ITRAK 365 to new heights for everyone!

Stay Up-to-Date by Following Us!

ITRAK 365

YouTube

- Training & Support Videos
- Webinar Recordings
- How-to Videos
- Conference Recordings
- and more…

ITRAK 365

LinkedIn

- ITRAK 365 News & Updates
- Customer Spotlights
- Current Events
- Webinar & Video Announcement
- and more…

DYK – ITRAK is available for trial on Microsoft AppSource?

Thank you for joining us!

Trevor

Darren

Corinne

Diane

Shilpa

Tom

Michelle

Kassem

Melik

Geoff

Ryan

Milton

Tian

Aaron

Thank you for your support!