

2020
SAFETECH
Synergy

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

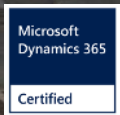
Thursday May 29 @ 3.15PM (MST)

Power Automate



ISV Connect Premier Tier Partner

ITRAK
365



www.useitrak.com

INTRODUCTIONS



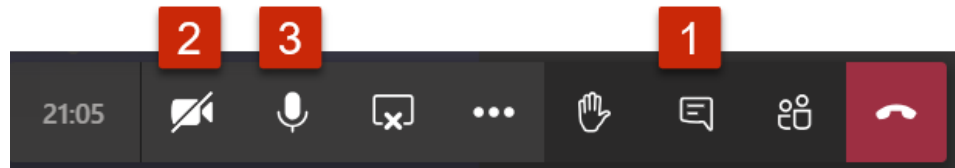
Diane Fritz
Senior Consultant

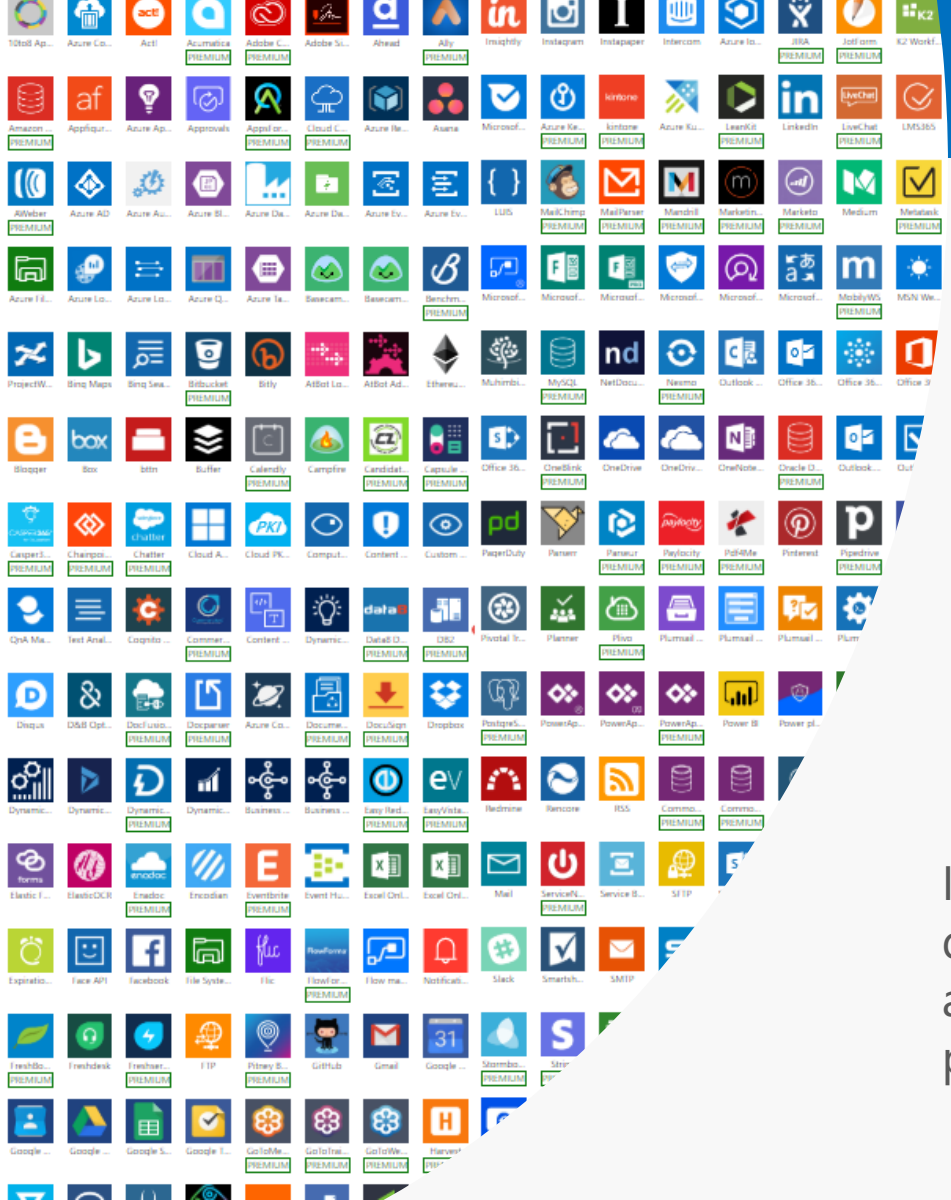


Melik Borhot
Product Development & Innovation



Corinne Dyck
Accountant & Sales Support





ITRAK & Power Automate

include powerful workflow automation directly in your apps with a no-code approach that connects to hundreds of popular apps and services including ITRAK

Power Apps

Environment: ITRAK QA Release

Save Flow checker Test

Home Learn Apps Create Data

Flows AI Builder Solutions

Form Status ← Form Type

Environment: ITRAK QA Release (itrakqarelease)

Entity Name: Forms

Scope: Business unit

Show advanced options

If Form Status = Preview AND Form Type = Incident

And

Form Sta... x is equal to c84983f4-22a4-e511-80d8-000c29ebe46b

Form Type x is equal to 1fdce0ba-6d9f-e511-80d8-000c29ebe46b

+ Add

If yes

Post Teams message to SAFETECH Conference channel (Preview)

Team: ITRAK QA Release

Channel: Incident Team

Message:

Font: 11 B I U

This is a test for the SAFETECH 2020 Conference!
This was posted from ITRAK QA Release, Incident Form # Form # x at status Preview.

Show advanced options

If no

Add an action

Similar to existing workflow in D365 but with point and click simplicity

When to use Power Automate versus Workflow Processes

- Currently when we think of Power Automate, we want to use it for what we cannot currently do in Workflows
- Microsoft continues to develop Power Automate for functionality and is expected to be complete by fall of this year
- ITRAK 365 add-ins that we have enhanced over the years that you currently have available in Workflows will also need to be developed for Power Automate once Microsoft has added capabilities. We anticipate this development to be completed for the end of the year

When to use Workflow Processes versus Power Automate

Use D365 **Workflows**:

Email notifications for forms, Training Task, Competencies, etc.

Actions based on conditions in the form
i.e. Field indicates form is Confidential, updates Ownership/Assignment to Confidential Team

ITRAK specific items such as Sharing the form at certain statuses

Creating other ITRAK records, such as a child form

Calling on User-defined fields such as Text, List fields

Use Power Automate Flows:

Message in Teams

Sending Microsoft Teams Cards

Leveraging Microsoft Bots

Other items in Teams, such as creating a Channel

SMS Text messages or Push notifications

Modelling human-driven processes such as approvals

Other items typically that we currently cannot manage in a standard Workflow

Simple integration with ITRAK

Demo – Power Automate in action

Path 1: Incident Form - Preview Status. Classification is not Injury

Status of Preview

- Post message in ITRAK HSE Team – Incident Team channel

The screenshot displays the Microsoft Teams application interface. On the left sidebar, the 'Teams' icon is selected. The main pane shows the 'Incident Team' channel, which is highlighted in yellow. The channel's structure is as follows:

- 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 Mgr Team
 - Hidden teams

The 'Incident Team' channel is currently active, showing a message from 'Flow' (a bot) dated 'Yesterday 8:01 PM'. The message content is:

Melik Borhot **Diane Fritz** A new Incident 1072 has been entered and is in the status of Preview.

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

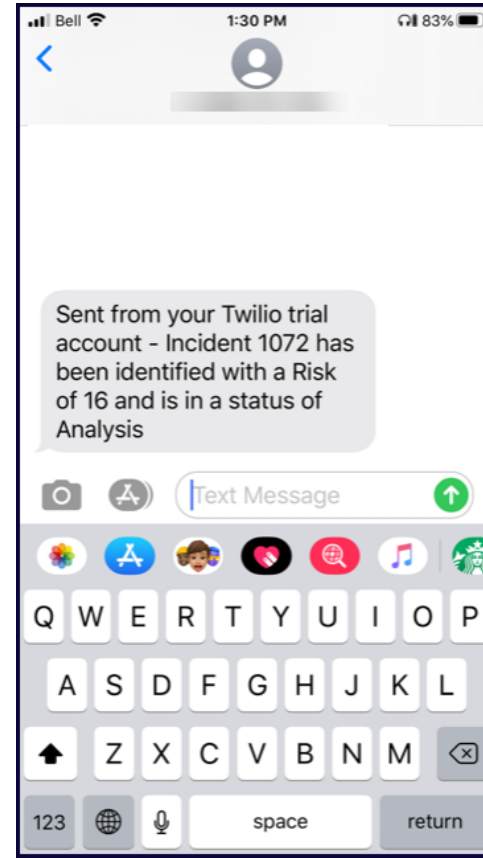
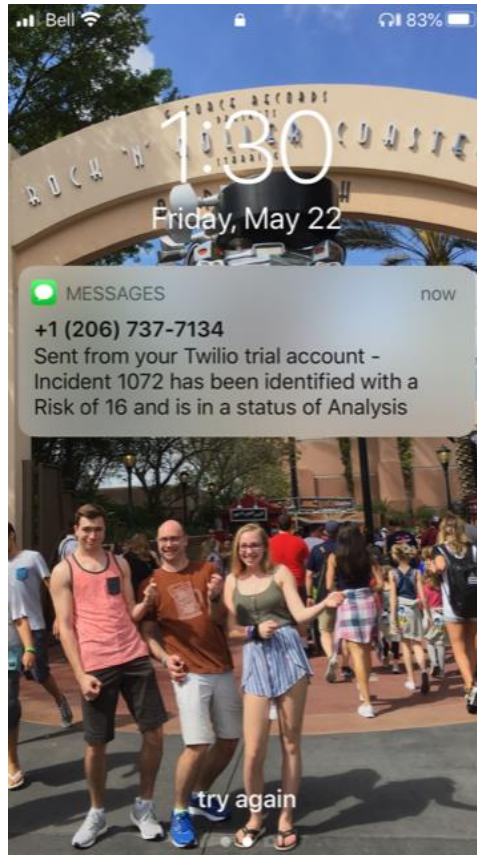
Below the message is a 'Reply' button. At the bottom of the screen, there is a text input field with the placeholder 'Start a new conversation. Type @ to mention someone.' and a 'Send' button.

Path 1: Incident Form - Analysis Status. Classification is not Injury

Status of Analysis

When Actual Risk = 16 - High (Catastrophic | Probable)

- Send SMS text message to Assigned To User
User must have Mobile phone number defined



Path 1: Incident Form - Analysis Status. Classification is not Injury

Status of Analysis

When Actual Risk = 16 - High (Catastrophic | Probable)

- Post Approval in Approval Team Channel

The screenshot displays the Microsoft Teams interface. On the left, the 'Teams' sidebar is visible, with the 'Approval Team' channel selected and highlighted in yellow. The main area shows the 'Approval Team' channel with a 'Posts' tab active. A Power Automate flow card is displayed, titled 'Approval for High Risk Incident'. The card includes the following information:

- Requested by:** Diane Fritz <diane.fritz@itrak365.com>
- Date Created:** 05/26/2020 19:58:25
- Link:** [View Incident in ITRAK](#)
- Description:** 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.
- Actions:** 'Approve' and 'Reject' buttons.

The card also includes a notification from Diane Fritz (diane.fritz@itrak365.com) stating: 'Diane Fritz (diane.fritz@itrak365.com) used Power Automate to send this notification. Learn more'.

Path 2: Incident Form - Preview Status. Classification is Injury

- Send Teams Card to Injury Mgr Channel

The screenshot displays the Microsoft Teams application interface. On the left sidebar, the 'Teams' icon is highlighted, and a list of teams is shown. The 'Injury Mgr Team' is highlighted in yellow. The main area shows the 'Injury Mgr Team' channel with a post titled 'Incident #1075'. The post content reads: 'Contractor was not tethered properly while working at heights'. Below the text is a photograph of an industrial facility at night, featuring large storage tanks and a truck. The post is attributed to 'Diane Fritz (diane.fritz@itrak365.com)' and mentions 'Power Automate'. A 'View Incident ITRAK' button is visible. The bottom of the screen shows a chat input area with a prompt to 'Start a new conversation. Type @ to mention someone.' and various communication icons.

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 Mgr Team

Injury Mgr Team

Posts Files Wiki

Flow 3:26 PM

Incident #1075

Contractor was not tethered properly while working at heights

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

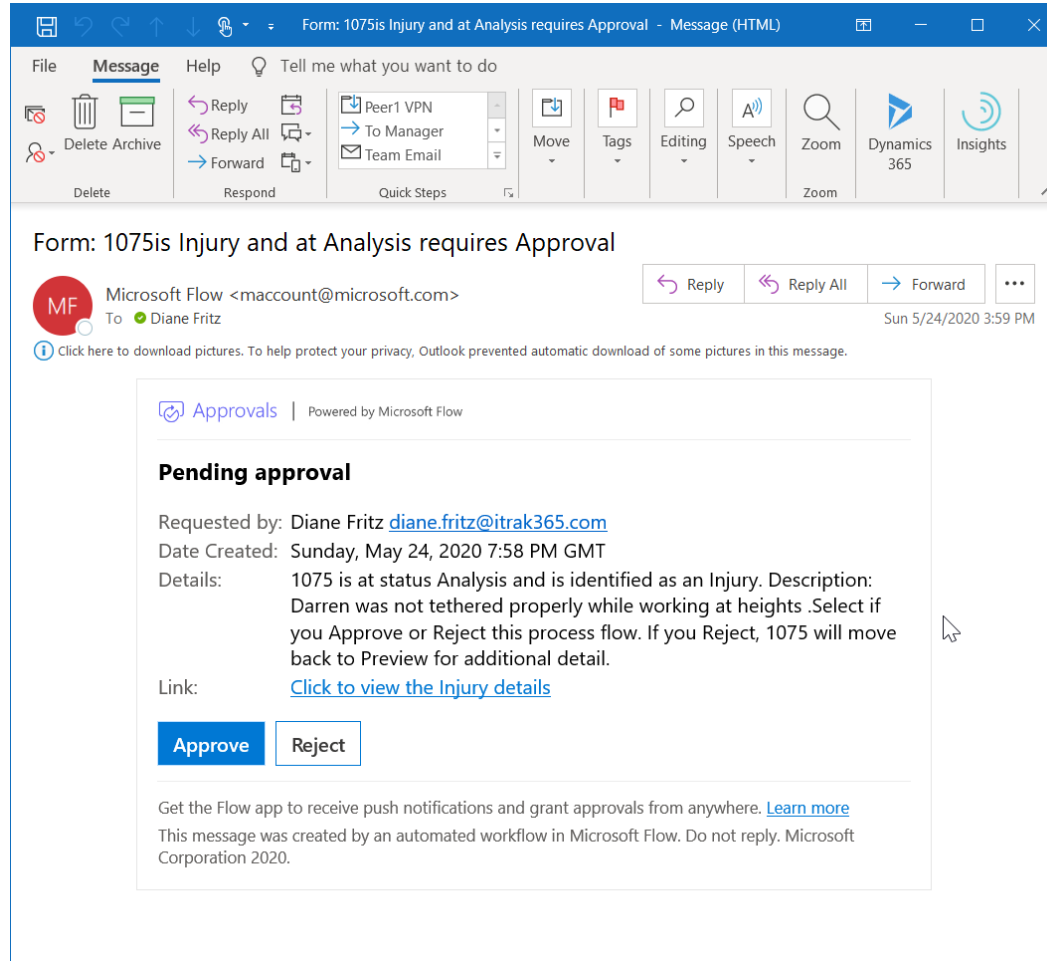
[View Incident ITRAK](#)

Reply

Start a new conversation. Type @ to mention someone.

Path 2: Incident Form - Analysis Status. Classification is Injury

- Send Approval Email



Recap Power Automate Flow

- Point and click simplicity to define criteria
- New options such as defining a message to be posted to a channel in Teams

This screenshot shows the configuration for a flow trigger. The trigger is named "If Status = Preview AND Type = Incident AND Classification does not = Injury". Below the trigger name, there are three conditions listed under an "And" group:

- Form St... (Form Status) is equal to c84983f4-22a4-e511-80d8-000c29e-be46b
- Form Type is equal to 1fdce0ba-6d9f-e511-80d8-000c29e-be46b
- Form Cl... (Form Classification) does not contain Injury

Each condition has a checkbox to its left and a three-dot menu to its right. At the bottom left, there is a "+ Add" button with a dropdown arrow.

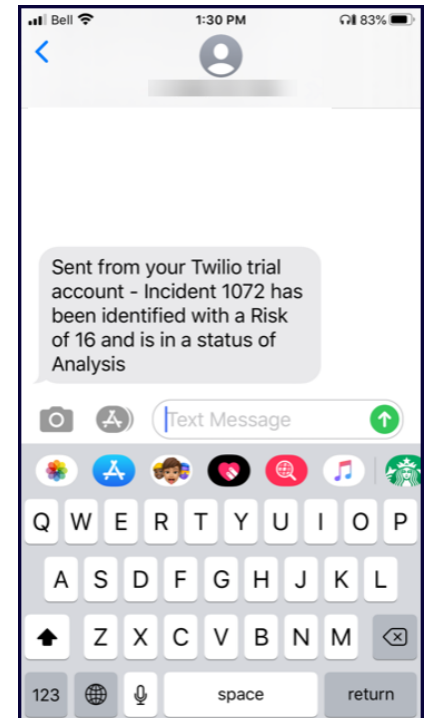
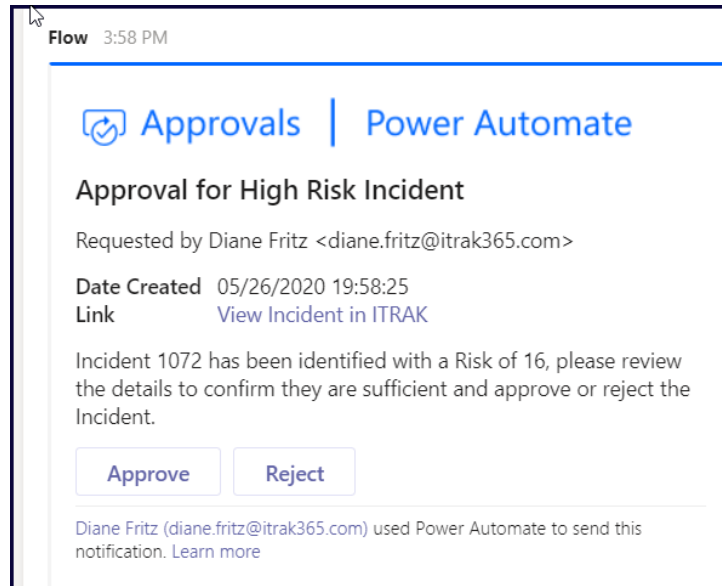
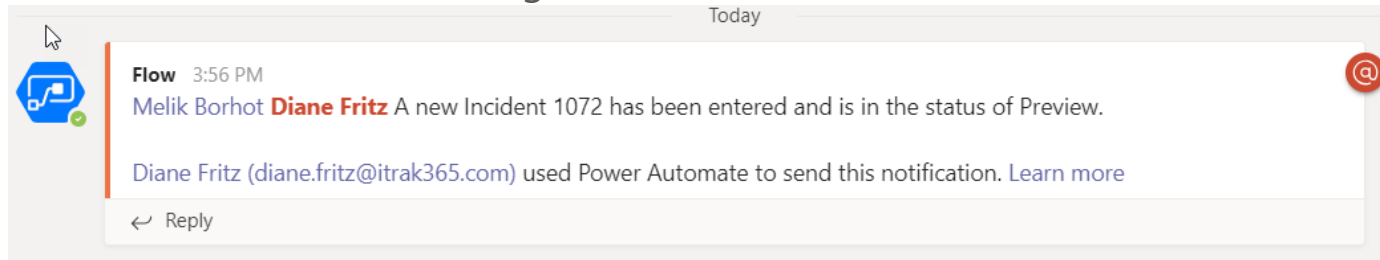
This screenshot shows the configuration for a flow action. The action is named "Post Team message in Incident Team channel (Preview)". It has a green checkmark icon and the text "If yes" in the top left corner. The configuration fields are:

- * Team: ITRAK HSE Team
- * Channel: Incident Team
- Message: <at>melik.borhot@itrak365.com</at> <at>diane.fritz@itrak365.com</at> A new Incident Form # has been entered and is in the status of Preview.

The message field contains a placeholder for a form ID, represented by a database icon and the text "Form #".

Recap - What our Power Automate Flow did today

- Posted a message to a Teams channel
- Sent an Approval to a Teams channel
- Sent an SMS Text message



Recap - What our Power Automate Flow did today

- Sent a Team Card in a Teams channel
- Sent an Email Approval

Incident #1075

Contractor was not tethered properly while working at heights



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

[View Incident ITRAK](#)

Form: 1075is Injury and at Analysis requires Approval - Message (HTML)

File Message Help Tell me what you want to do

Delete Archive Delete Respond Quick Steps Move Tags Editing Speech Zoom Dynamics 365 Insights

Form: 1075is Injury and at Analysis requires Approval

Microsoft Flow <maccount@microsoft.com>
To Diane Fritz

Sun 5/24/2020 3:59 PM

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Approvals | Powered by Microsoft Flow

Pending approval

Requested by: Diane Fritz diane.fritz@itrak365.com
Date Created: Sunday, May 24, 2020 7:58 PM GMT
Details: 1075 is at status Analysis and is identified as an Injury. Description: Darren was not tethered properly while working at heights .Select if you Approve or Reject this process flow. If you Reject, 1075 will move back to Preview for additional detail.

Link: [Click to view the Injury details](#)

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

Get the Flow app to receive push notifications and grant approvals from anywhere. [Learn more](#)
This message was created by an automated workflow in Microsoft Flow. Do not reply. Microsoft Corporation 2020.

What is the future of Power Automate and Workflows?

- Continue to use Workflows for current ITRAK capabilities
- Use Power Automate Flows for new functionality
- End of year Microsoft will add full capabilities of Workflows to Power Automate



Questions?

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

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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