

2020

SAFETECH *Synergy*

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

Wednesday May 27 3:15pm (MST)

"What's new in Dynamics that is relevant to ITRAK 365?"



ISV Connect Premier Tier Partner

ITRAK
365



www.useitrak.com

Housekeeping Items

- Please mute yourselves
- If there aren't a lot of people, we'll take questions openly throughout the presentation
- Otherwise, feel free to ask question in the Chat panel or click the 'Raise hand' icon
- You can also join our Microsoft Teams Conference Channel and continue the conversation there (Ask Us How?)
 - Instructions: <https://itrak365.com/conference-schedule/>
- If you have question after the conference, see above or you can just email them to us via support@neosystems.com
- We can provide copies of the video and any presentation materials, just ask
- Check out our YouTube and LinkedIn pages as well
- Make sure to look at the Schedule for other sessions

INTRODUCTIONS

<https://itrak365.com/about-us/#the-team>



Melik Borhot

Product Development & Innovation

- 10 Years with ITRAK
- 15 Years Microsoft Dynamics experience
- 25 Years of Development



Tom Makarov

Customer Success Manager

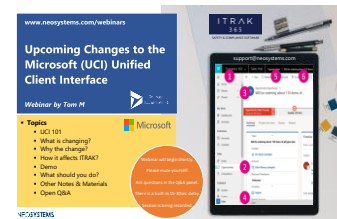
- 18-year Software Industry veteran
- PM, Implementation, System Admin, Consulting, Help Desk, and more...

Agenda

- **Microsoft UCI (Unified Client Interface) Changes**
 - Basic UI
 - Navigation
- **Role-based Apps**
- **Power Platform Admin Centre**
 - Analytics
 - Capacity
 - Common Data Service
 - More..
- **Log Retention**

Microsoft UCI Changes

- If you'd like to see a more detailed presentation on UCI changes, we've done a couple of Support Webinars on the subject
- Good example on our YouTube page:
 - <https://www.youtube.com/watch?v=ksvK5Uplgcc&feature=youtu.be>
- We'll also be doing more of these sessions monthly
 - Until around October 2020
 - www.itrak365.com/webinars
- Presentation we've done before. FILE -->

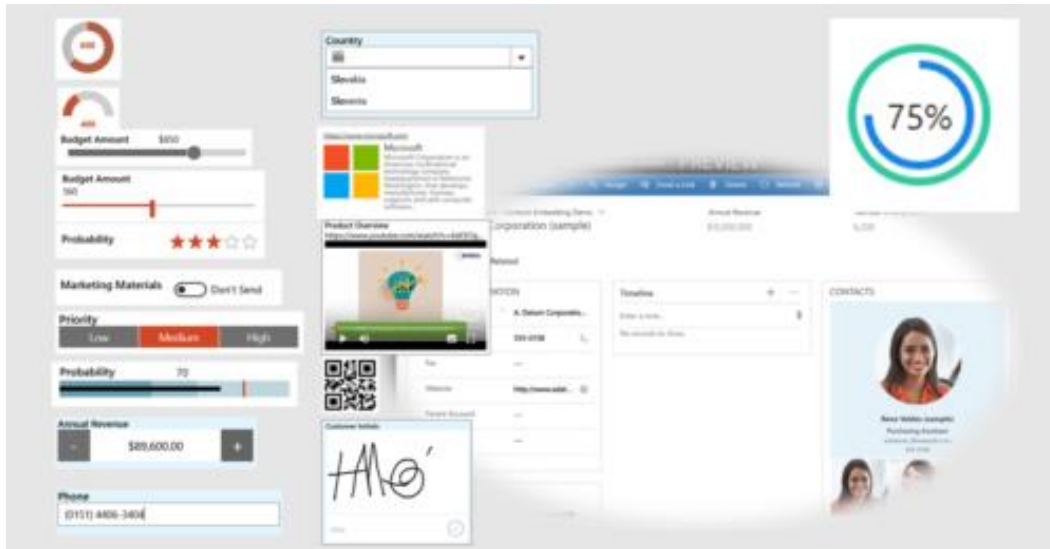


Microsoft UCI Changes - Highlights

- **Navigation/Layout/UI/UX**
 - Updated graphics, visuals, tiles, menus
 - More flexible filters, colours, WCAG compliance
 - Less clicks, scrolling, pop-ups
 - Auto-scaling, site-map style design, sub-grids
 - Breadcrumbs, Recent and Pinned options
 - Much more...
- **Extendibility**
 - Common Data Services (CDS)
 - Embedded APIs
 - Power Apps

Component Framework

- Component Framework layer sits on top of Dynamics that allows controls like dials, switches, sliders, etc.
- More flexible for future development
- Overall better visuals



Performance Improvement

Performance and Fundamentals

63%

Improvement in
grid load

37%

Improvement in
form load

45%

Improvement in
dashboard load

30%

Improvement in
quick create load

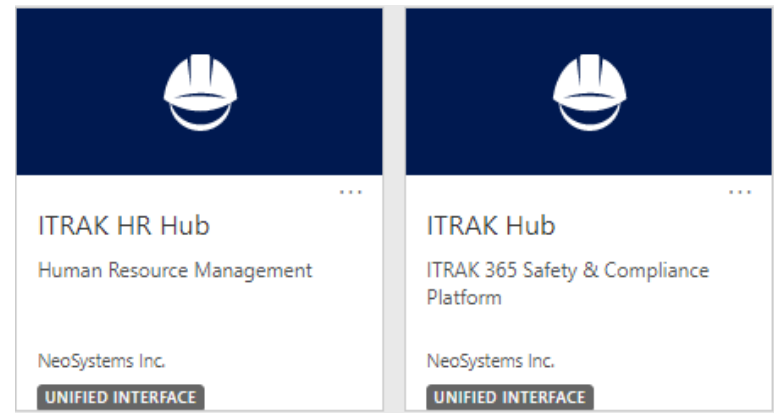
27%

Improvement in
mobile app launch

- Optimized application metadata retrieval
- Efficient metadata caching on the client to avoid re-downloading
- Improved rendering performance of Forms
- Optimized bound dashboard rendering time
- Improved performance of customized form ribbons
- Improved Mobile app launch time

Role-Based Apps

- The vision is that people will design their Dynamics/ITRAK security to give them access/visibility to just the things that they need
- per App (Can have multiple apps accessing the same Dynamics instance, for example)
- Role-based
 - Administrator
 - Project Manager/Supervisor
 - Human Resources
 - HSE
 - Sales
 - Trainer
 - Ops
 - Auditor
 - Reporting Specialist
 - Etc.



Role-Based Apps (Example)

- Each role comes with different menu choices:

The image displays four vertical application menus, each representing a different user role. A red circle highlights the role-specific menu items at the bottom of each menu:

- Forms:** Includes sections for Forms, Settings (Form Types, Form Business Units, Form Business Uni..., Form Checklists, Form Groups, Form Status, Form Inspections, Assignment Roles), and Other (Assessment Types, Cause Analysis Ty..., Classification Types, Classifications, Event Types). The role-specific item is **F Forms**.
- Employees:** Includes sections for Employees (Employees, Employee Job Roles, Training, Training Tasks), Procedures (Procedure Groups, Procedure Subgro..., Procedure PPE/To..., Session Activity St..., Procedures, Procedure Compe...). The role-specific item is **T Training**.
- Events:** Includes sections for Events (Event Occurrences, Event Template), Operations (Jobs, Equipment, Facilities, Exposure Hours, Property), Procedures (Procedure Groups, Procedure Subgro..., Procedure PPE/To..., Session Activity St..., Procedures, Procedure Compe...), and Documents. The role-specific item is **O Operations**.
- Administration:** Includes sections for Administration (Autonumber, Dates, Periods (Monthly), Periods (Weekly), Quick Links), ITRAK System (ITRAK System Sett..., ITRAK System Jobs, ITRAK System Job ...), and Business Management (Companies, Divisions, Offices, Departments, Regions, Queues). The role-specific item is **S Settings**.

Power Platform Admin Center

Power Platform admin center

You're currently operating on the previous capacity model. [Learn more](#)

⚠ Your organization (tenant) is over capacity. This will impact certain environment operations. [Manage capacity](#)

Don't show this again

Environments

Analytics

Capacity

Common Data Service

Power Automate

Power Apps

Resources

Help + support

Data integration

Data gateways (preview)

Data policies (preview)

Admin centers

Capacity

Summary Storage capacity

See where your org (tenant) is using storage, add-ons, and API requests that could impact your capacity. [Learn more](#)

Storage capacity usage

✖ Storage is over capacity. This will impact certain environment operations. [Learn more](#).

Overall 66.37 of 57.38 GB used
15.67% over

- Database used 55.42 GB
- Log used 6.16 GB
- File used 4.79 GB

Storage capacity, by source

[View self-service sources](#)

Source	Capacity
Org (tenant) def...	10 GB
User licenses ⓘ	6.38 GB
Additional capaci...	41 GB
Total	57.38 GB

Top storage usage, by environment

DB, File, Log


Environment	Log (GB)	File (GB)	Database (GB)	Total (GB)
NeoSystems Inc.	~0.5	~1.5	~7.5	~9.5
ITRAK demo	~3.8	~0.2	~3.5	~7.5
NeoSystems Test	~1.0	~0.5	~5.5	~7.0

Power Platform Admin Center

• Environments

- *Able to get into Settings*
- *Backup*
- *Copy*
- *Delete*
- *Etc.*

Environments

Environment	Type	State
 ITRAK demo	...	Production Ready
NeoSystems Test		Ready
ITRAK Sandbox		Ready
NeoSystems Inc.		Ready

- Open environment
- Settings
- Resources >
- Convert to sandbox
- Backups >** Create
- Copy Restore or manage
- Delete

Details

Environment URL	State	Region
neosystemstest.crm3.dynam...	NotSpecified	Canada
Refresh cadence	Type	Security group
Moderate	Sandbox	D365 Production

Version

Database version
9.1.0.18028

Updates

2020 release wave 1
On
[See what's included](#)

- **Capacity**

- *Summary (tab)*

- High-level overview
 - Database
 - Logs
 - Files
 - By Tenant
 - Warnings & Notifications

- *Storage Capacity (tab)*

- Ability to see details
 - Next slide (ex)...

Power Platform Admin Center (example)

① Try to download all table sizes by selecting menu from database capacity usage chart menu.

Capacity > NeoSystems Inc.

See where this environment is using storage capacity and analyze it with tables.

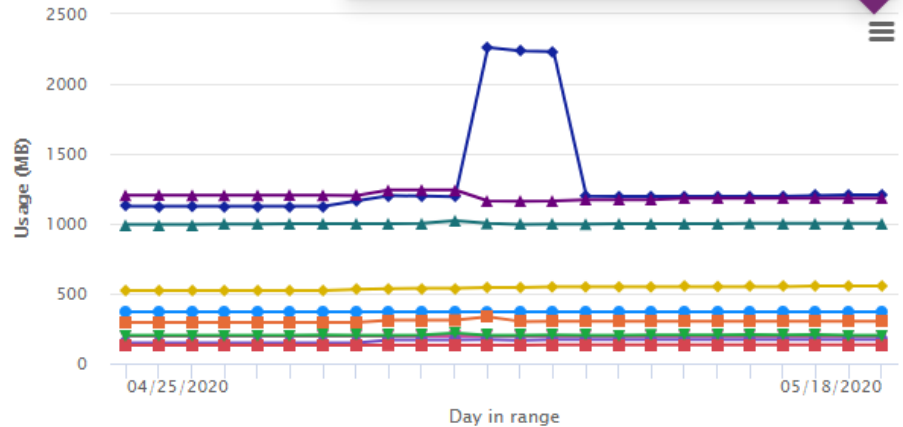
Database usage

6.75 GB

To reduce usage here, delete non-essential records. [Learn more](#)

Top database capacity use, by table

- WorkflowLogBase
- WebResourceBase
- SystemFormBase
- RibbonClientMetadataBase
- ProcessSessionBase
- PluginAssemblyBase
- ImportJobBase
- Attachment
- ActivityPointerBase
- ActivityPartyBase



Power Platform Admin Center

- **Common Data Service**
 - Home
 - Active Users
 - Mode of access
 - Entity usage
 - System jobs
 - Plug-ins
 - API Calls statistics
 - Mailbox usage

- *This is all about Analytics*
 - Operations
 - Active Users
 - Plug-in failures
 - More...

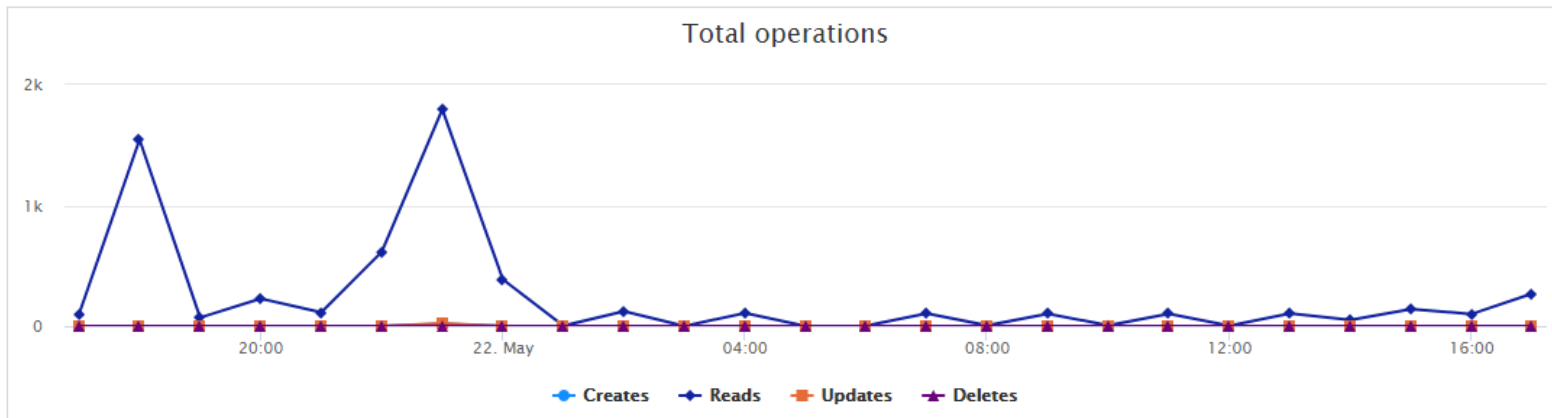
Power Platform Admin Center (example)

Common Data Service analytics

[Learn more](#) · [Who can view these reports?](#)

[Home](#) [Active users](#) [Mode of access](#) [Entity usage](#) [System jobs](#) [Plug-ins](#) [API calls statistics](#) [Mailbox usage](#)

Showing data for <https://neosystems.crm3.dynamics.com> from 5/21/2020 11:00 AM to 5/22/2020 11:00 AM [Change filters](#)



Power Platform Admin Center

- **Power Automate**

- Runs
- Usage
- Created
- Errors
- Shared
- Connectors

- **Power Apps**

- Usage
- Location
- Toast Errors
- Service Performance
- Connectors

*All the Dashboards
are **Power BI** based
and Filterable!*

Filters ✕

Environment *
NeoSystems Inc. (neosystems) ▾

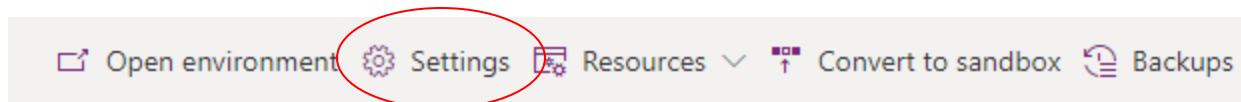
Time period *
Last 28 Days ▾

Apply Cancel

Showing data for **NeoSystems Inc. (neosystems)** for the **Last 28 Days**. [Change filters](#)

Auditing

- Under Environments > *pick one* > **Settings**
 - Easier to monitor
 - Often a large portion of disk



Environments > **ITRAK demo**

Details		
Environment URL	State	Region
itrakdemo.crm3.dynamics.c...	NotSpecified	Canada


Auditing

Environments > NeoSystems Test > **Settings**


Search for a setting

∨  **Product**


Behavior, Features, Languages, Privacy + Security


∨  **Business**

Business closures, Calendar, Connection roles, Currencies


∨  **Users + permissions**


Business units, Hierarchy security, Mobile configuration, Positions


∧  **Audit and logs**


Audit log management 

Audit settings

Audit summary view 

Entity and field audit settings 

Legacy audit settings 


System jobs 

∨  **Templates**


Access team templates, Article templates, Contract templates, Data import templates

∨  **Email**


Email settings, Email tracking, Mailboxes, Server profiles

∨  **Integration**

Document management settings, Microsoft Social Engagement, Outlook, Synchronization

∨  **Data management**

Add ready-to-use business processes, Announcements, Auto numbering, Automatic record creation policies

∨  **Encryption**

Data encryption

∨  **Resources**

All legacy settings, Dynamics 365 for Outlook

Auditing – Audit Settings

Environments > NeoSystems Test > Settings > **Audit settings**

Auditing

Manage logging for Common Data Service data

Start Auditing

Turn Auditing on/of

Log access ⓘ

Log when a user
signs in

Read logs ⓘ

Log when a user
views a record

Auditing – Audit Log Management

✕ Delete Logs

Serial Number	From	To
1	Not Available	3/31/2020 5:59:59 PM
2	3/31/2020 6:00:00 PM	6/30/2020 5:59:59 PM

- Logs are stored in batches of 90 days
- Logs can only be deleted by batch
- Only 1 batch can be deleted at a time
- Only the oldest batch can be deleted

Other Changes/Benefits

- Anything else you need to know?
- Check out our other sessions on **Technology!**
- <https://itrak365.com/conference-schedule/>
- Suggested:
 - AI Builder – Thursday 1pm
 - Future ITRAK App UI – Thursday 1pm
 - Workflow Engine – Thursday 1:45pm
 - ITRAK Hidden Treasures – Thursday 3:15pm

Questions?

ITRAK 365

*What's new in Dynamics
that is relevant to ITRAK?*


Thank You for Attending!

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