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

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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…

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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**

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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
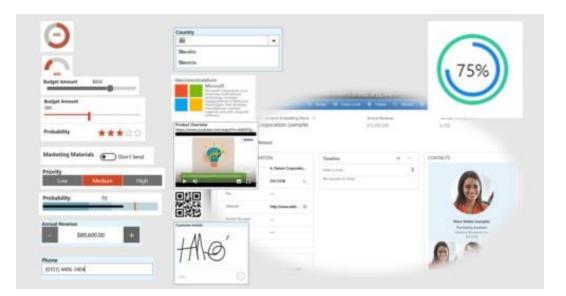 - Breadcrumbs, Recent and Pinned options
  - Much more…

- **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
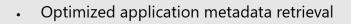grid load

37%

Improvement in
form load

45%

Improvement in
dashboard load

30%

Improvement in
quick create load

27%

Improvement in
mobile app launch

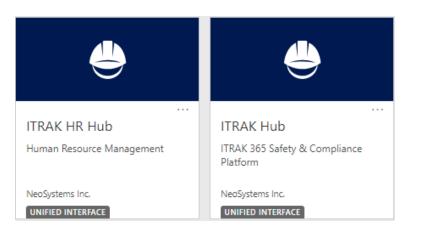- Optimized application metadata retrieval

- 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

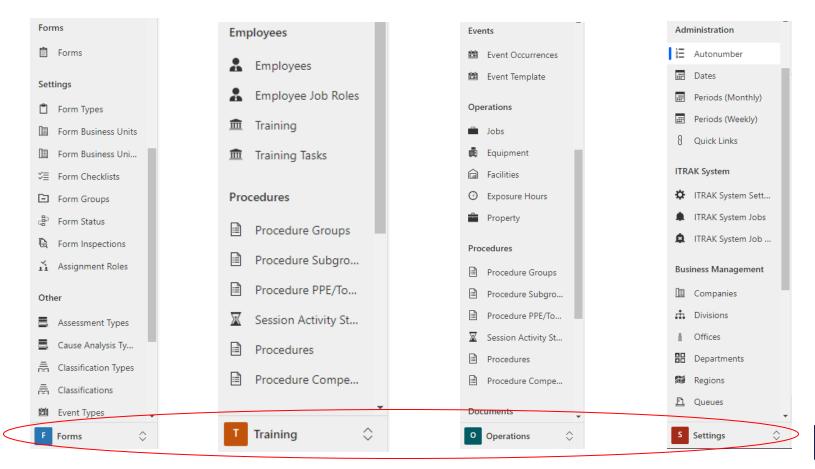ITRAK
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Role-Based Apps

- 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.

ITRAK HR Hub

Human Resource Management

NeoSystems Inc.

UNIFIED INTERFACE

ITRAK Hub

ITRAK 365 Safety & Compliance Platform

NeoSystems Inc.

UNIFIED INTERFACE

ITRAK 365

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Role-Based Apps (Example)

- Each role comes with different menu choices:

Power Platform Admin Center

Power Platform Admin Center

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

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

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

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Power Platform Admin Center

- **Capacity**
  - *Summary (tab)*
    - High-level overview
      - Database
      - Logs
      - Files
    - By Tenant
    - Warnings & Notifications

  - *Storage Capacity (tab)*
    - Ability to see details

    - Next slide (ex)…
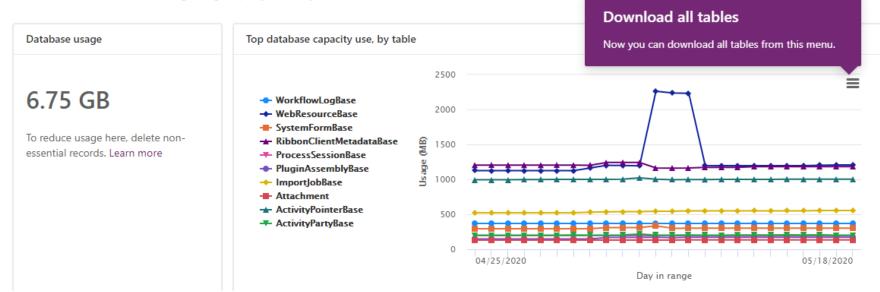
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Power Platform Admin Center (example)

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…

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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

Active Users	API Calls	API Pass Rate	Executions
10	1,805	100.00%	1,124

Total operations

Creates   Reads   Updates   Deletes

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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 *
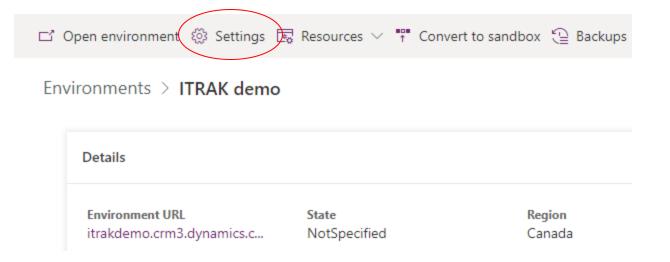Last 28 Days   ⌄

Apply   Cancel

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

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Auditing

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

Auditing

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
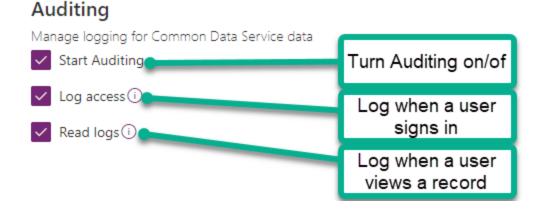
🛡️ **Encryption**

Data encryption

🌐 **Resources**

All legacy settings, Dynamics 365 for Outlook

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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

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Auditing – Audit Log Management

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	

✕ Delete Logs

- 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/

- <u>Suggested</u>:
    - AI Builder – Thursday 1pm
    - Future ITRAK App UI – Thursday 1pm
    - Workflow Engine – Thursday 1:45pm
    - ITRAK Hidden Treasures – Thursday 3:15pm