

Building User Management Systems in Microsoft Power Platform

Tracking Access, Approvals, and Access Removal for the Texas Immunization Registry (ImmTrac2)

Presented by Adrian Sanvictores and Megan Lafleur



TEXAS
Health and Human
Services

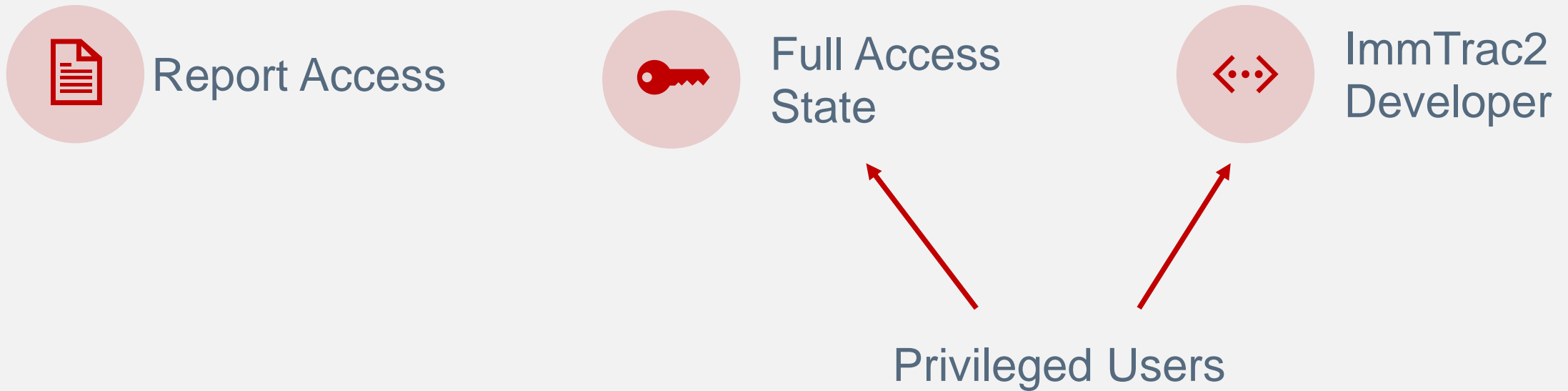
Texas Department of State
Health Services

The Problem




- No way of easily tracking privileged users in ImmTrac2
 - Privileged users: ability to create new users that can view and edit client and organization records
- Requests for access or access removal done via email then manually stored in SharePoint
 - User error/latency presented issues

ImmTrac2 Access Types



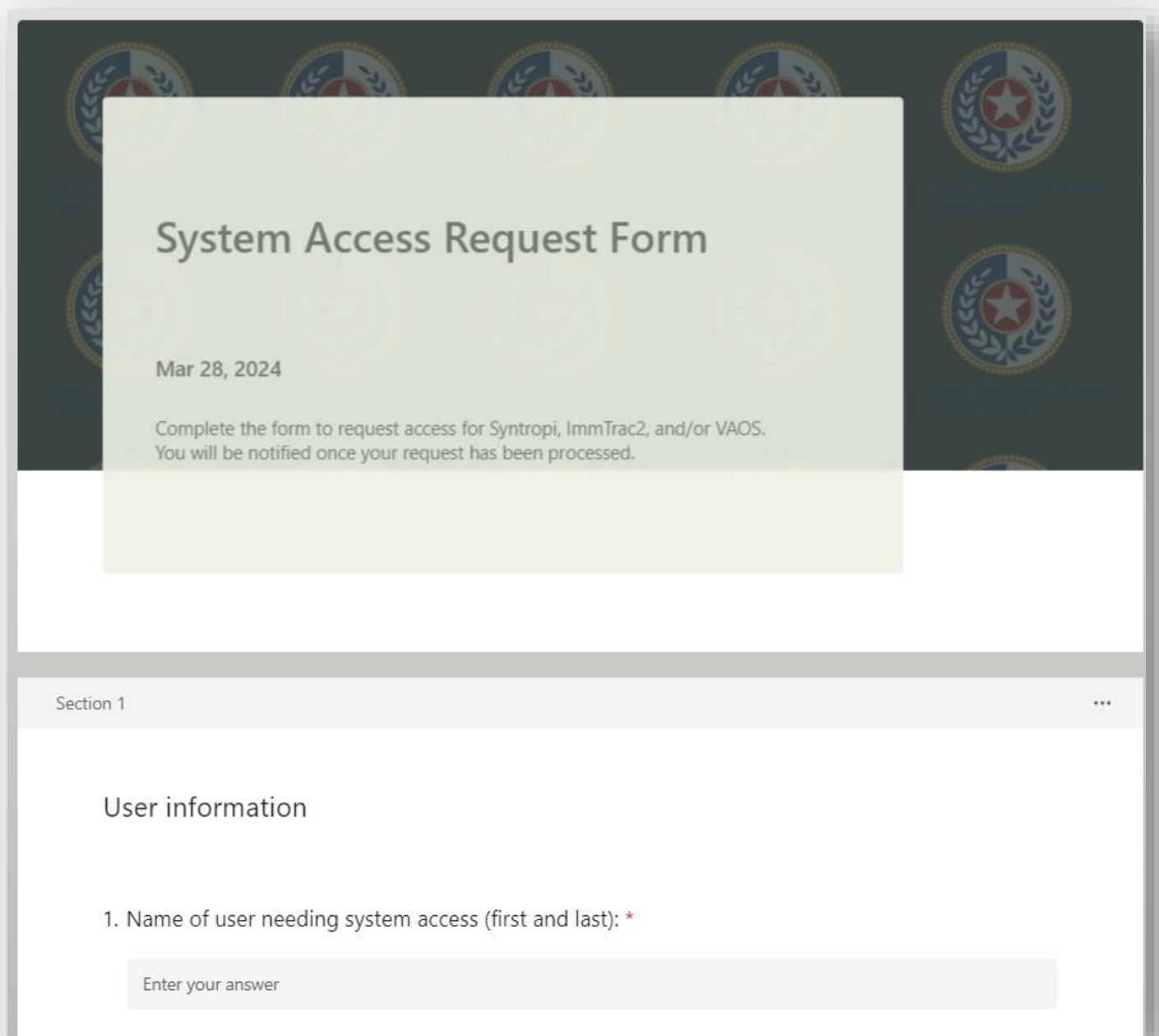
The Solution



- Increased security and ability to monitor
 - Centralized repository
 - Automated record keeping
 - Tracking privileges
 - Keeping processes out of individual inboxes
 - Meeting internal audit requirements
- 

Microsoft Forms

- Initially used Microsoft Forms
- Limited options
- Lacked customization



System Access Request Form

Mar 28, 2024

Complete the form to request access for Syntropi, ImmTrac2, and/or VAOS.
You will be notified once your request has been processed.

Section 1

User information

1. Name of user needing system access (first and last): *

Enter your answer

Microsoft Power Platform



The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



Power BI
Business analytics



Power Apps
App development



Power Automate
Process automation



Power Virtual Agents
Intelligent virtual agents



Power Pages
External-facing websites



Data connectors



AI Builder



Dataverse

Power Apps Landing Page

System Access Request Portal

Syntropi, ImmTrac2, Vaccine Allocation Ordering System (VAOS), FTP Manager,
Immunization Provider Relationship Management (IPRM)

Welcome,
Megan



See pending
requests



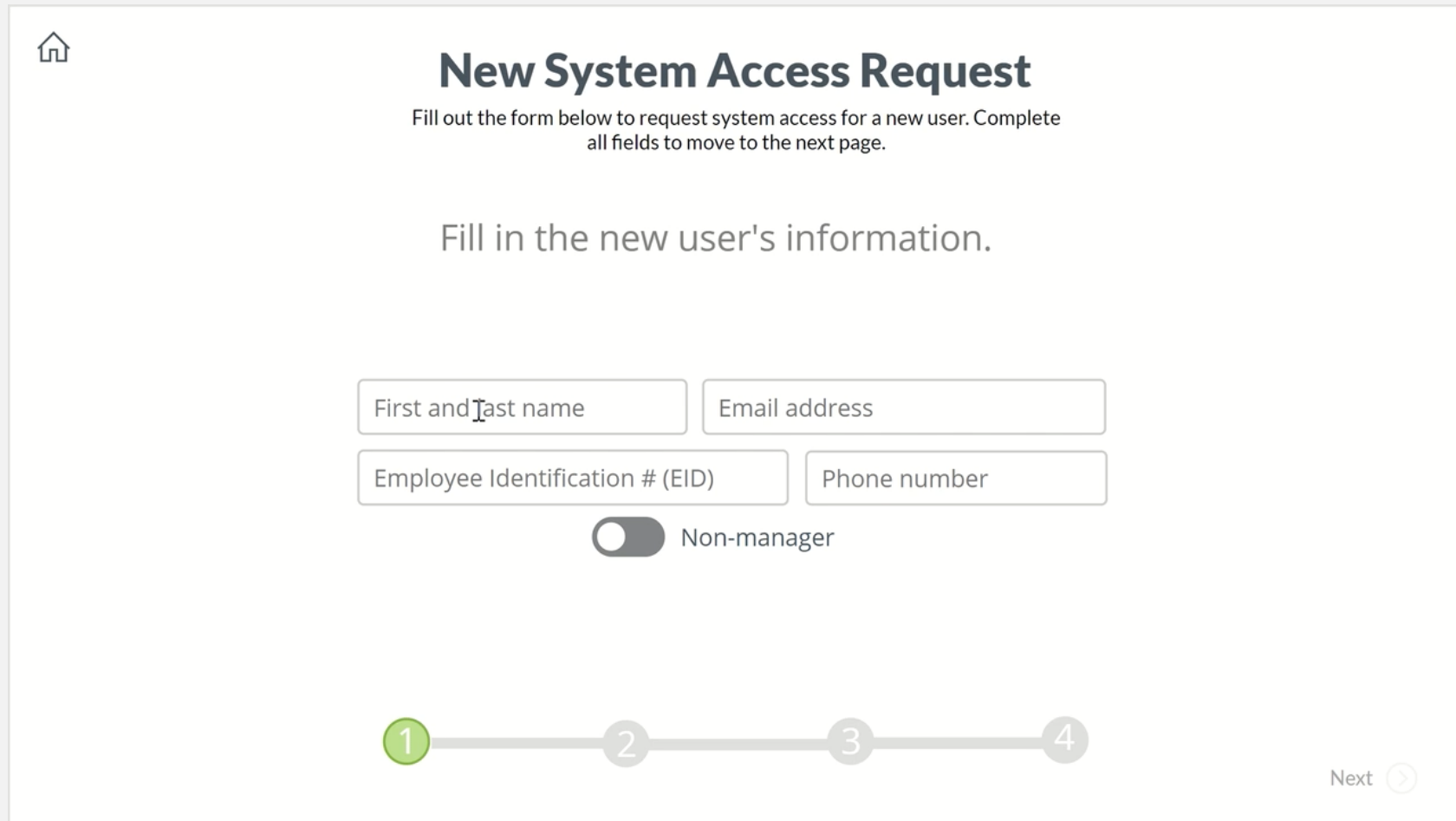
Submit a
new request




See all existing
users

1. Request Access: Power Apps

- Low code, no code, or more code
- Form options
- Integrated with other Microsoft products (connectors)
- Manager or team lead submits the request using a customized form in Power Apps



The screenshot shows a web form titled "New System Access Request" with a home icon in the top left. Below the title is a subtitle: "Fill out the form below to request system access for a new user. Complete all fields to move to the next page." The main instruction is "Fill in the new user's information." The form contains four input fields: "First and last name", "Email address", "Employee Identification # (EID)", and "Phone number". Below these fields is a toggle switch labeled "Non-manager" which is currently turned off. At the bottom, there is a progress bar with four steps: 1 (highlighted in green), 2, 3, and 4. A "Next" button with a right arrow is located at the bottom right.

 **New System Access Request**
Fill out the form below to request system access for a new user. Complete all fields to move to the next page.


Fill in the new user's information.

First and last name Email address

Employee Identification # (EID) Phone number

☐ Non-manager

1 2 3 4

Next 

Your access request was submitted: Lorelai Gilmore



Lafleur,Megan (DSHS)

To  Lafleur,Megan (DSHS)

 Reply

 Reply All

 Forward





Fri 4/5/2024 9:44 AM

Your access request for Lorelai Gilmore was successfully submitted. You will be notified if additional information is needed or when your request has been processed.

Thank you,
ImmTrac2 Security Team
IIS_Security@dshs.texas.gov

2. Store the Request: SharePoint



- Cloud-based storage
- Integrated with other Microsoft products

Storing the Request

User management ★

Date of request ▾	Date of approval ▾	Status ▾	Date access provisioned ▾	Team ▾
3/20/2024	3/21/2024	Completed	3/21/2024	IIS Unit: Data Analytics Group
3/21/2024	3/22/2024	Approved		VOU: Vaccine Data and Finance Gro
3/27/2024		Pending		IIS Unit: Director's Office
4/4/2024	4/4/2024	Pending	4/5/2024	ACE Branch

3. Send for Approval: Power Automate



**Power
Automate**

- When a new list item is added, a flow is triggered to send a pre-populated email to the IIS security team
- Some items require additional approvals



When a new item is created

* Site Address

* List Name

[Show advanced options](#)



Send an email (V2)

* To

* Subject

* Body

```
</>

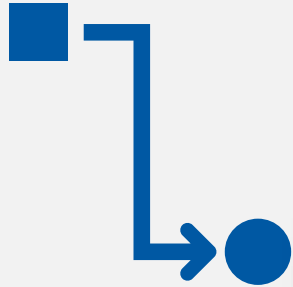
<p>A new system access request has been submitted by  :<br>
</p>
<ul>
<li> </li>
<li> </li>
<li> </li>
</ul>

<p><a href="https://apps.powerapps.com/play/e/default-9bf97732-82b9-499b-b16a-a93e8ebd536b/a/40d82051-71b0-465b-8ef7-6f8c261aed8c?tenantId=9bf97732-82b9-499b-b16a-a93e8ebd536b&hint=551357de-7569-436b-b9c9-6566001374e1&sourcetime=1699563864343&Screen=approval&ID= ">See more details
and approve.</a>
</p>
```

[Show advanced options](#)



4. Approve & Complete Request



- Security team receives approval email with link
- Link populates the specific request
- Request is fulfilled

Action Required: New System Access Request



DSHS IIS Security
To ○ DSHS IIS Security

↩ Reply

↩ Reply All

→ Forward



Fri 4/5/2024 9:45 AM

A new system access request has been submitted by Megan.LaFleur@dshs.texas.gov:

- Lorelai Gilmore
- Lorelai.Gilmore@dshs.texas.gov
- ACE Branch

[See more details and approve.](#)

User Provisioning Access Approval

Name

Lorelai Gilmore

Email

Lorelai.Gilmore@dshs.texas.gov

Team

ACE Branch

Requester email

Megan.LaFleur@dshs.texas.gov

System(s) requested

ImmTrac2 Schema Database, Syntropi, ImmTrac2, FTP Manager

Environment(s) requested

UAT (testing environment), TRN (training environment, Production (live environment)

Recommended ImmTrac2 access

Approve


Deny


5. Revoke Access

- Revocation requested when employee access requires a change


System Access Request Portal

Syntropi, ImmTrac2, Vaccine Allocation Ordering System (VAOS), FTP Manager,
Immunization Provider Relationship Management (IPRM)


Welcome, Megan 



See pending requests



Submit a new request



See all existing users



System Access Requests



Search by user name

VERONICA BODIS
VERONICA.BODIS@dshs.texas.gov



John Boggs
John.Boggs@dshs.texas.gov



Jerry Peterson
Jerry.Peterson@dshs.texas.gov




ARTHUR IARA




Revoke Requested

Date of request ↓ ▾	Status ▾	Team ▾	Manager ▾	User name ▾
4/5/2024	⚠ Revoke requested	ACE Branch	✓	Lorelai Gilmore

Access revocation requested: Lorelai Gilmore



Lafleur, Megan (DSHS)
To  DSHS IIS Security

↩ Reply

An access revocation was requested for Lorelai Gilmore. Disassociate the user from all system accesses.

6. Store Documentation




Save approval emails




Save revocation
emails

Store Approval Emails




 When a new email arrives in a shared mailbox (V2) ? ...


* Original Mailbox Address

IIS_Security@dshs.texas.gov; 


Folder

Inbox 

Show advanced options ▼


 Export email (V2) ? ...

* Message Id

 Message Id ×

Original Mailbox Address


IIS_Security@dshs.texas.gov;

 Create file ? ...


* Site Address

O365-TIR Group - <https://txhhs.sharepoint.com/sites/ImmTracGroup> ✓


* Folder Path

/Shared Documents/New or Exiting Employees/AUDIT Folder - Access Approvals (ImmTrac2, DB, IPRM, FTP, VAOS, Syntropi) 

* File Name

 Subject × .msg

* File Content

 Body ×

Store Revocation Emails



When a new email arrives in a shared mailbox (V2)

* Original Mailbox Address: IIS_Security@dshs.texas.gov;

Folder: Inbox

Show advanced options ▾

↓

Export email (V2)

* Message Id: Message Id ×

Original Mailbox Address: IIS_Security@dshs.texas.gov;

+ ↓

Create file

* Site Address: O365-TIR Group - <https://txhhs.sharepoint.com/sites/ImmTracGroup> ▾

* Folder Path: /Shared Documents/New or Exiting Employees/AUDIT Folder - Removal of Access (ImmTrac2, DB, IPRM, FTP, VAOS, Syntropi) ▾

* File Name: Subject × .msg

* File Content: Body ×

6. Store Documentation

+ New

Upload

Edit in grid view

Share

Copy link






Sync

Add shortcut to OneDrive

...

All Documents

TIR Library > New or Exiting Employees > AUDIT Folder - Removal of Access (ImmTrac2, DB, IPRM, FTP, VAOS, Syntropi)

	Name	Modified	Modified By	Comments
				
	 Access revocation requested_ Lorelai Gilmore.msg	2 hours ago	Lafleur,Megan (DSHS)	
				


Auto-Populating Access Details

- Based on the team selected, the standard access settings are stored in a separate list.
- Joined on “Role” column

System access details ★

Role ▾	Syntropi role re... ▾	Syntropi admin... ▾	ImmTrac2 access ▾
VOU: Vaccine Operations Group	IIS/VFC Staff	N	Report access
VOU: Vaccine Data and Finance Group	IIS/VFC Staff	N	Report access
IIS Unit: Data Analytics Group	IIS Staff	N	Full access state
IIS Unit: Operations Group	IIS Staff	N	Full access state
VOU: Adult & Influenza Group	IIS/VFC Staff	N	Report access
IIS Unit: Interoperability Group	HL7 Exchange	N	Full access state
ACE Branch	IIS/VFC Staff	N	Report access
IIS Unit: Director's Office	IIS Staff	N	Full access state, ImmTrac2 Developer
Program Coordination & Integration Suppo...	IIS/VFC Staff	N	Full access state
HHS/HHSC/External	IIS Staff	N	ImmTrac2 Developer

Lorelai's Access

Status ▾	Team ▾	Manager ▾	User name ▾		Syntropi administrator? (Y/N) ▾	ImmTrac2 access ▾
 Pending	ACE Branch	✓	Lorelai Gilmore			
					N	Report access
					N	Report access
					N	Full access state
					N	Full access state
					N	Report access
					N	Full access state
					N	Report access
					N	Full access state, ImmTrac2 Developer
					N	Full access state
					N	ImmTrac2 Developer

Permissions



- Permissions set for both application and underlying data (SharePoint)
- Managed by security team
- Custom contribution permission access

Archiving Users

- Revoked users archived weekly

Date of request ↓ ▾	Status ▾	Team ▾	Manager ▾	User name ▾
4/5/2024	⚠ Revoke requested	ACE Branch	✓	Lorelai Gilmore



Benefits



- Cost efficient
 - Integration
 - Customizable
 - Scalable and Versatile
 - Secure
 - Improve productivity
- 

Thank you!



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Megan.Lafleur@dshs.texas.gov



TEXAS
Health and Human
Services

Texas Department of State
Health Services