Building User Management Systems in Microsoft Power Platform

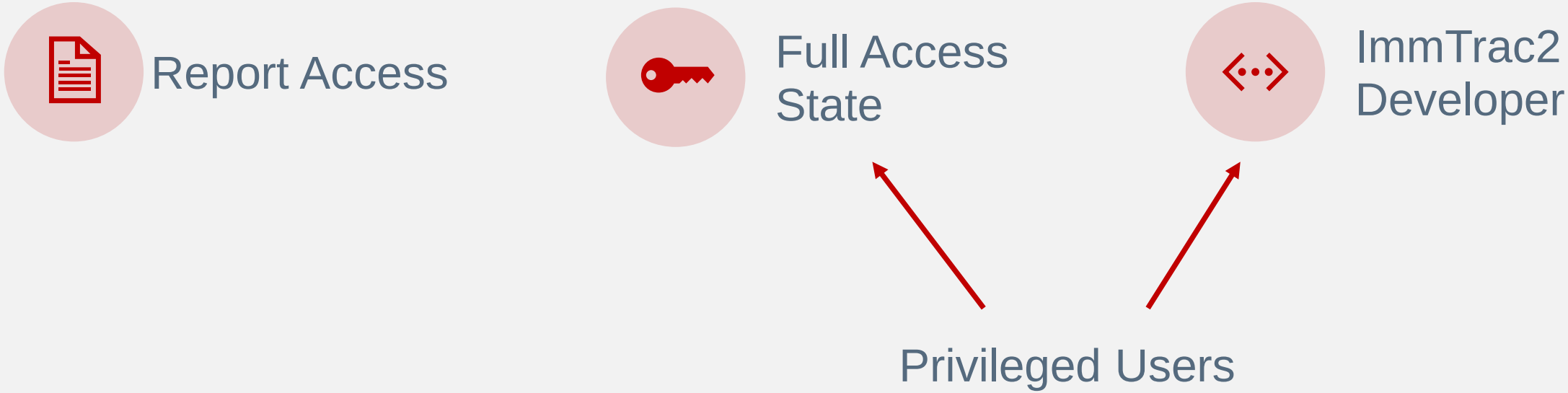
Tracking Access, Approvals, and Access Removal for the Texas Immunization Registry (ImmTrac2)

Presented by Adrian Sanvictores and Megan Lafleur

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

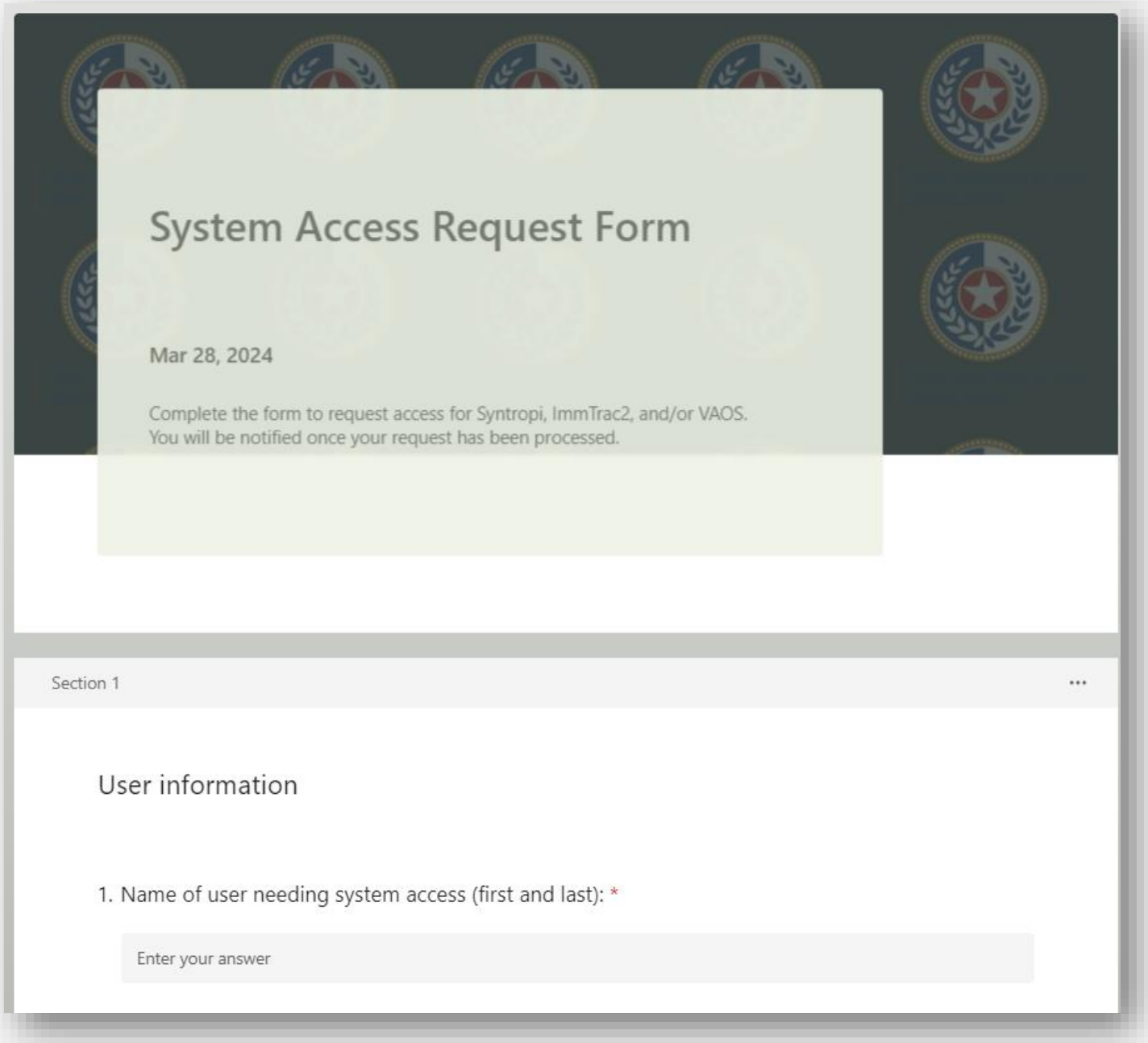


The Solution

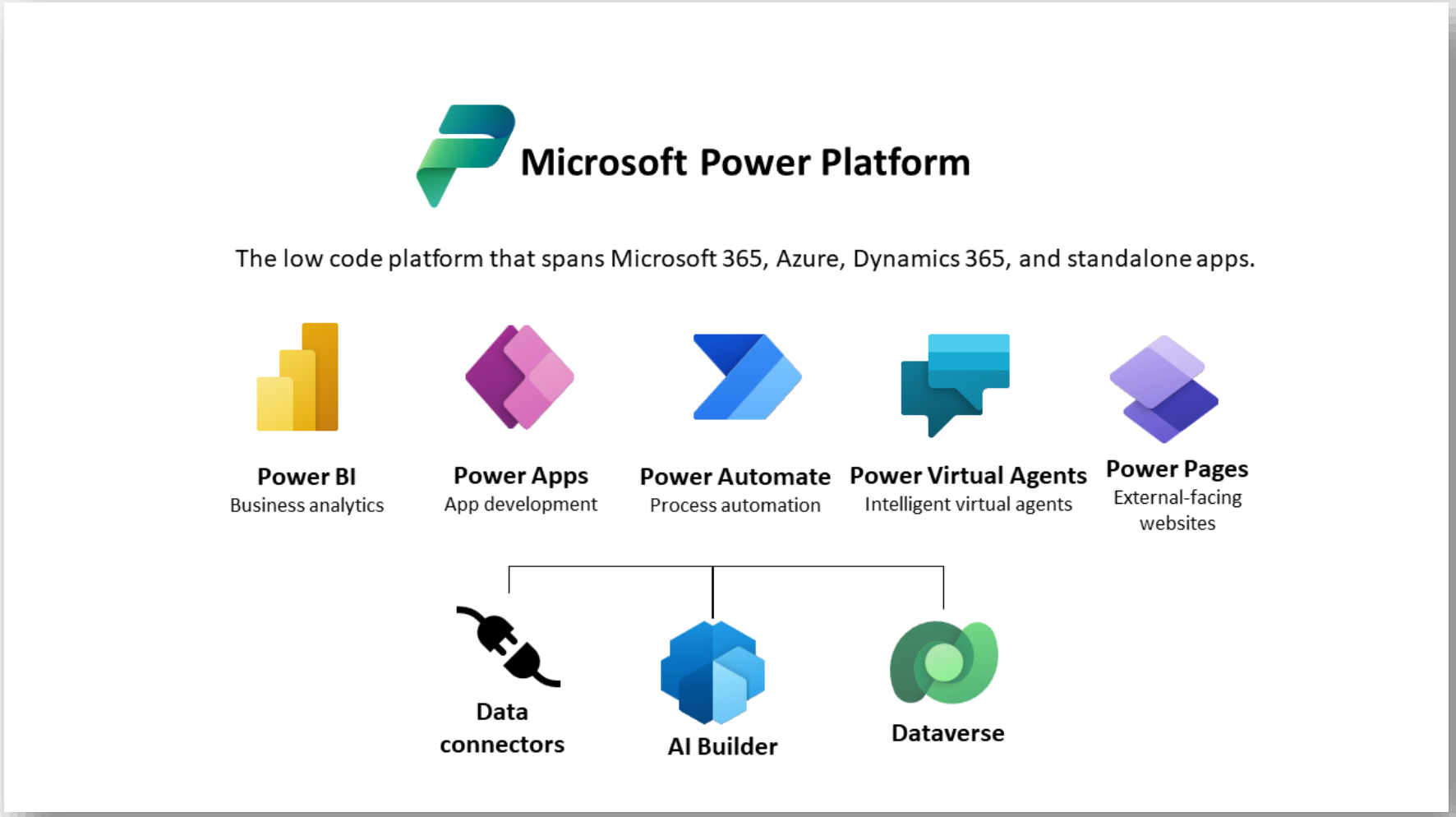
- Increased security and ability to monitor
- Centralized repository
- Automated record keeping
- Tracking privileges
- Keeping processes out of individual inboxes
- Meeting internal audit requirements

Microsoft Forms

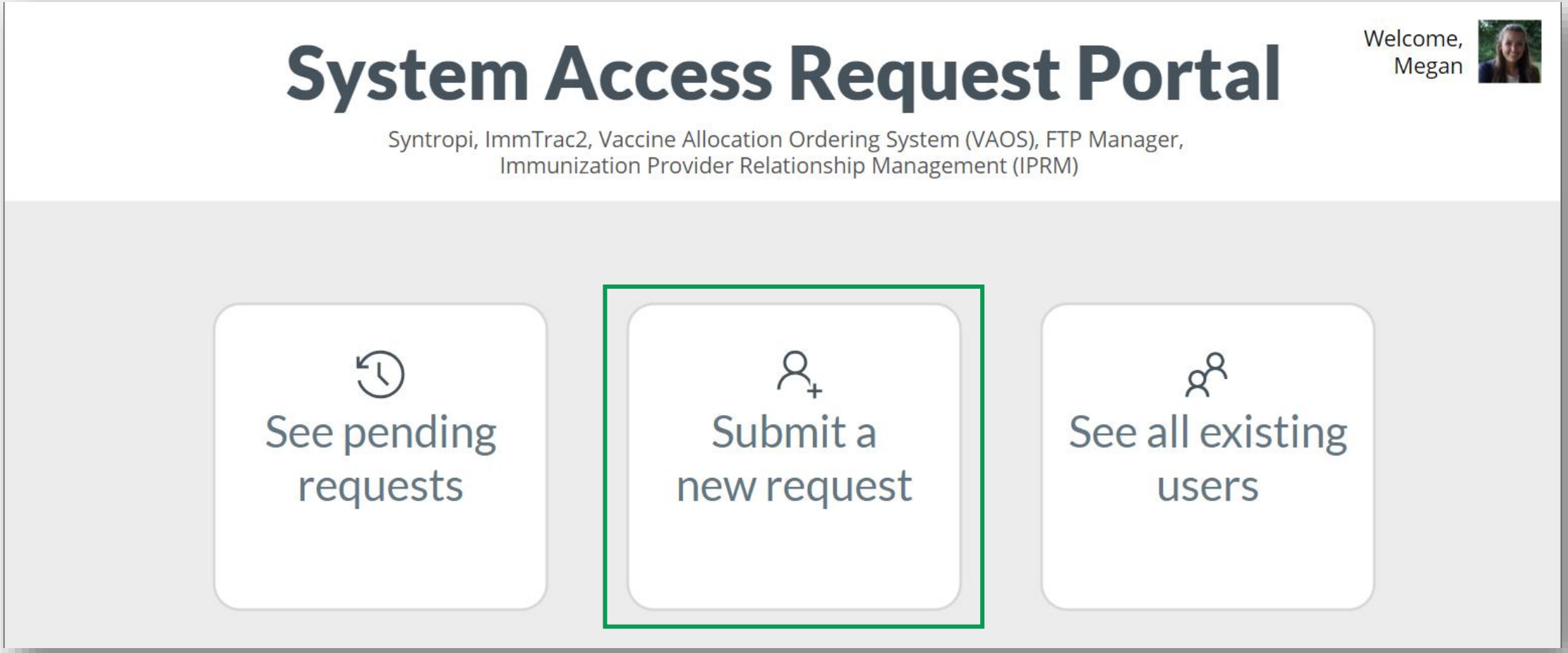
- Initially used Microsoft Forms
- Limited options
- Lacked customization



Microsoft Power Platform

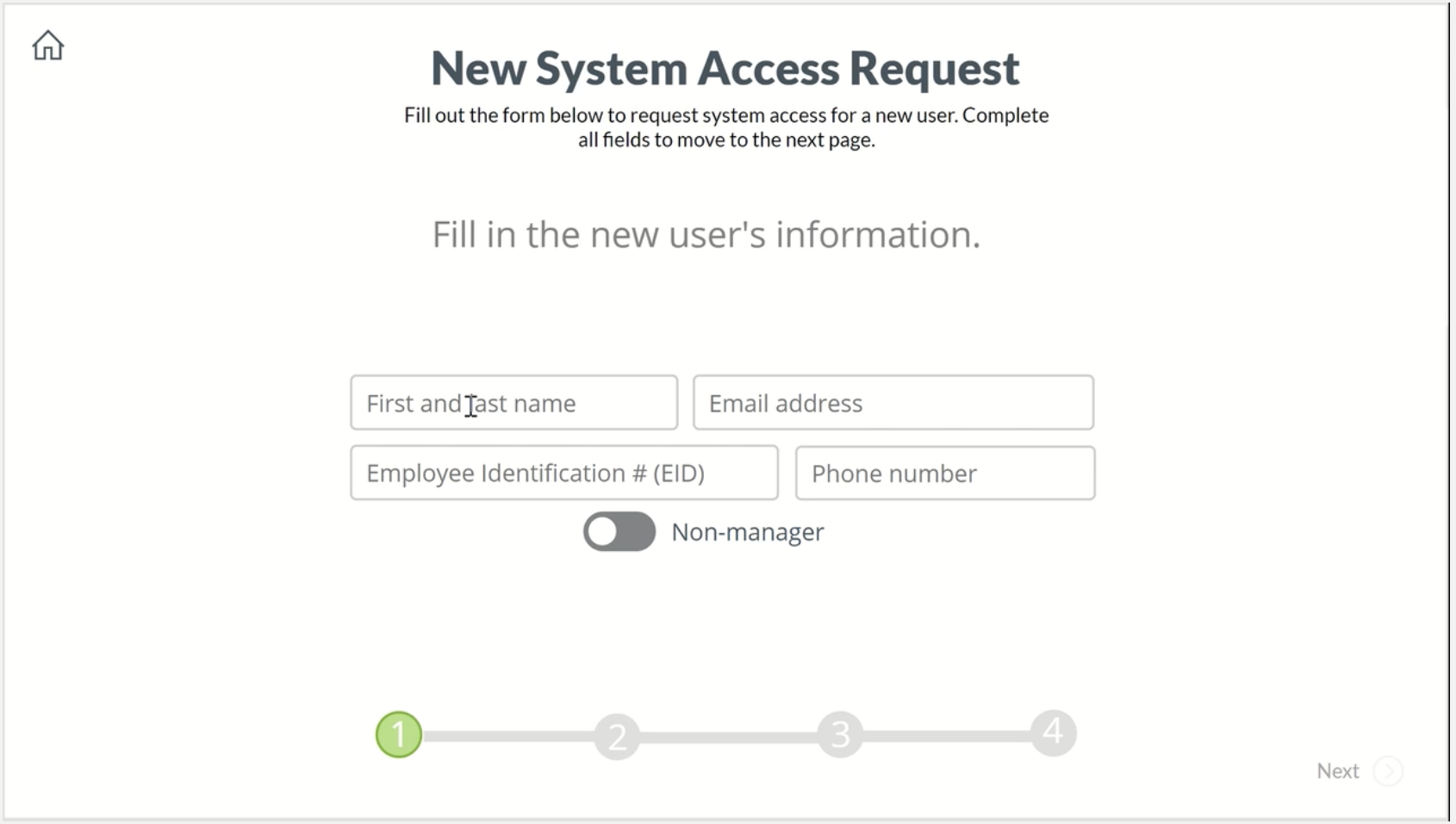


Power Apps Landing Page



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



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

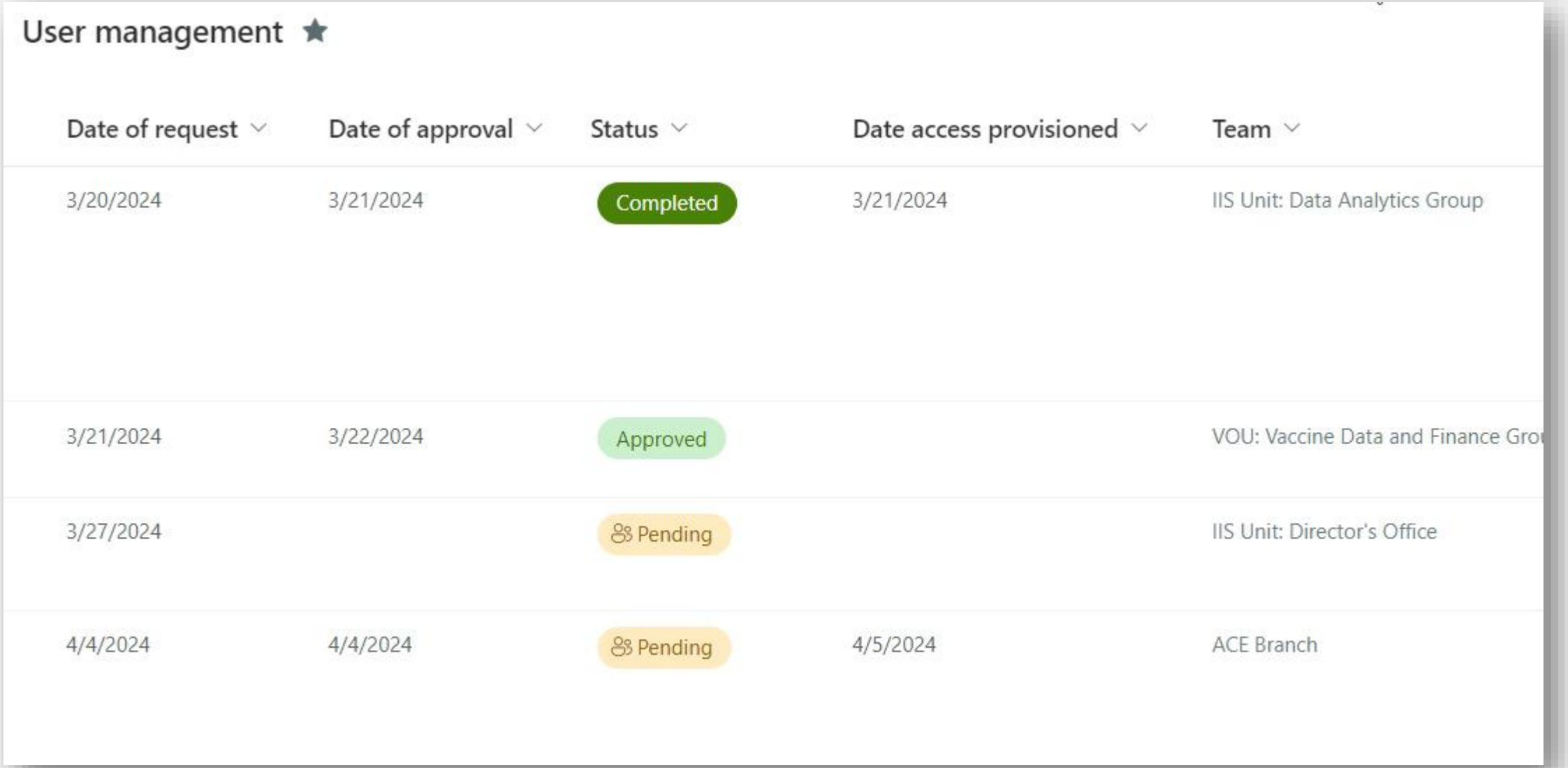
Your access request for Lorelai Gilmore was successfully submitted. You will be notified if additional information is needed or when your request has been processed.

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

- 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: TIR SP Site (iis_...

*List Name: System access ...

Show advanced options

Send an email (V2)

*To: IIS_Security@dshs.texas.gov

*Subject: Action Required: New System Access Request

*Body

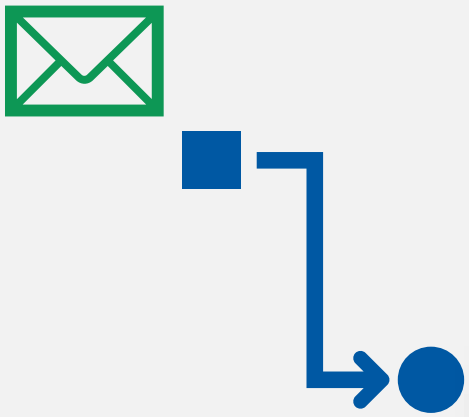
```
<p>A new system access request has been submitted by [Title] :<br>
</p>
<ul>
 <li>[User name] </li>
 <li>[User email address] </li>
 <li>[Team Value] </li>
</ul>

<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=[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

DI

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

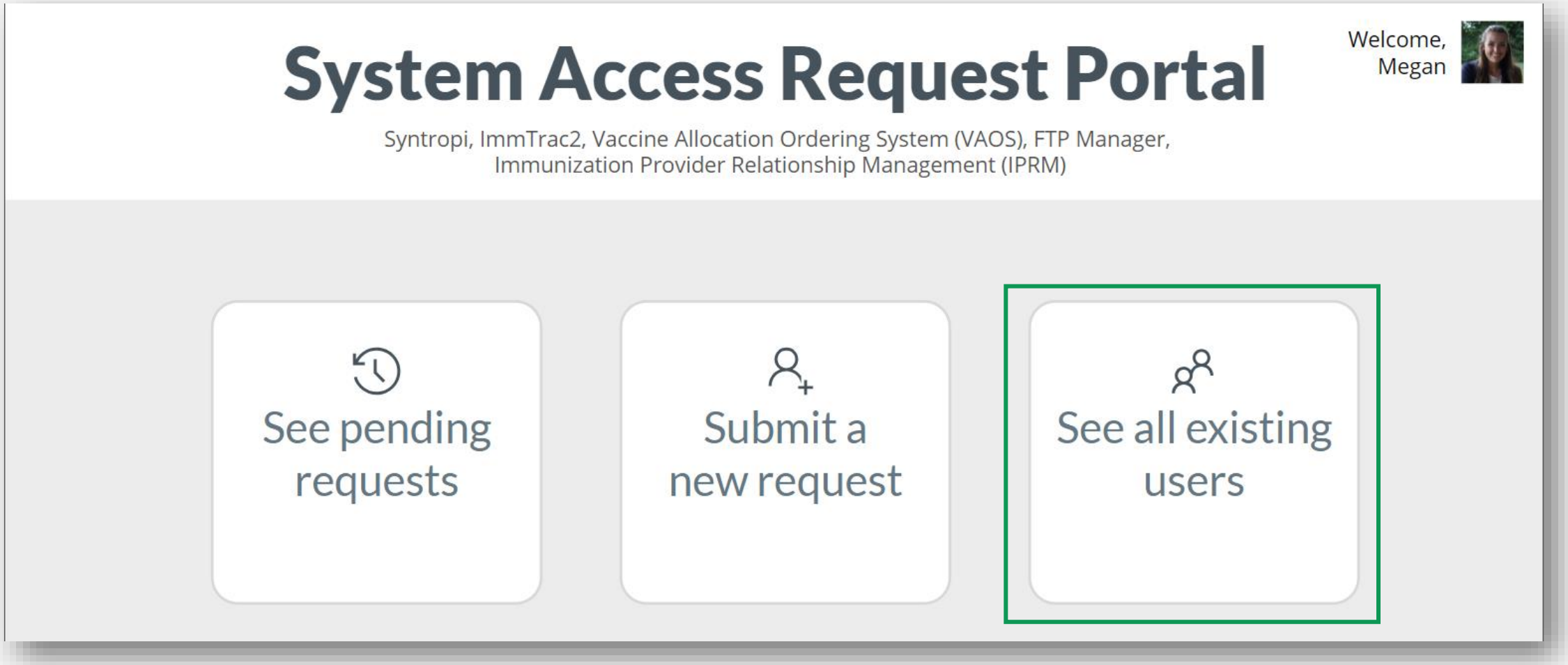
Environment(s) requested
UAT (testing environment), TRN (training environment, Production (live environment)

Recommended ImmTrac2 access

Approve | Deny

5. Revoke Access

- Revocation requested when employee access requires a change



System Access 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 LARA

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

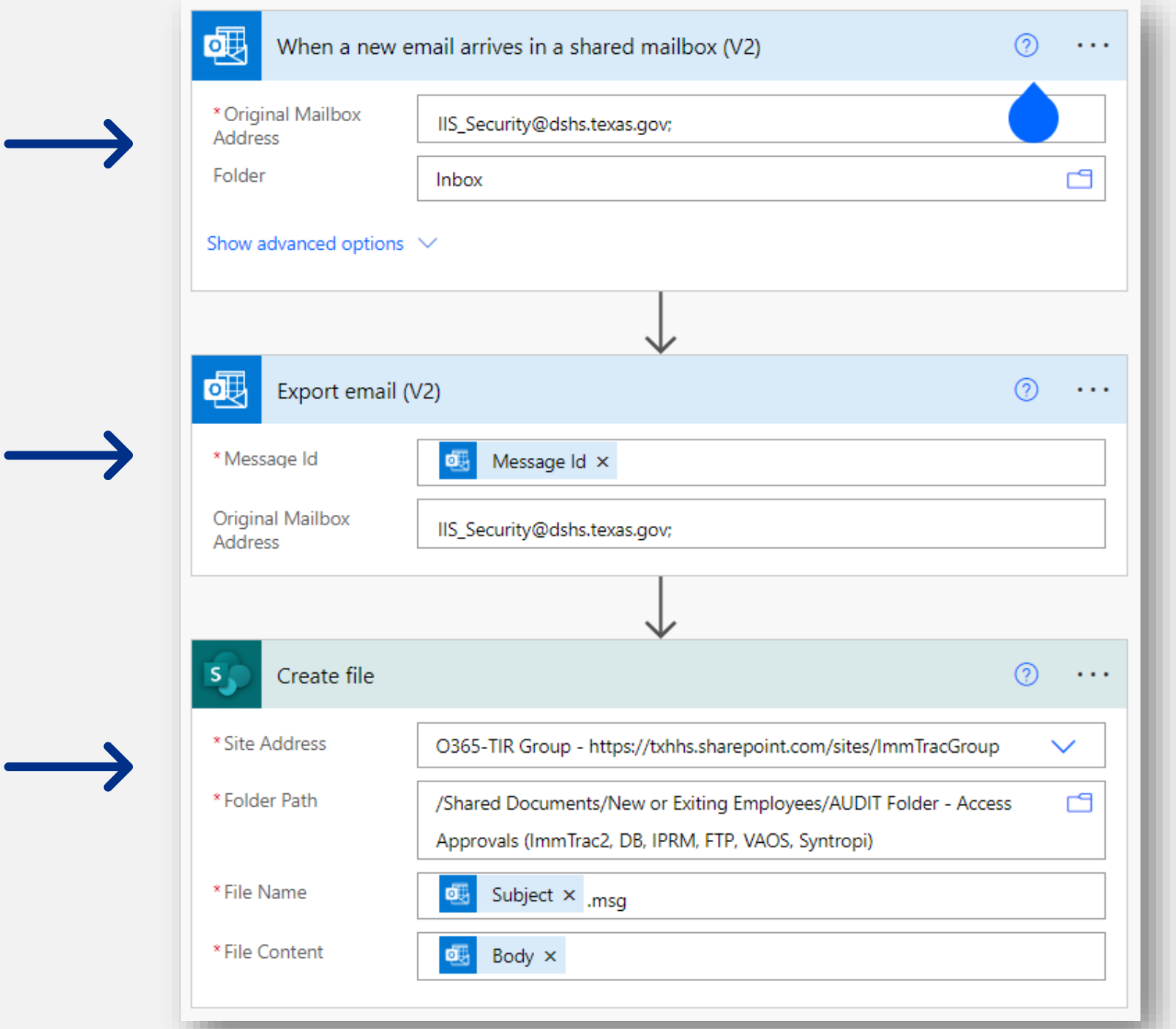
An access revocation was requested for Lorelai Gilmore. Disassociate the user from all system accesses.

6. Store Documentation

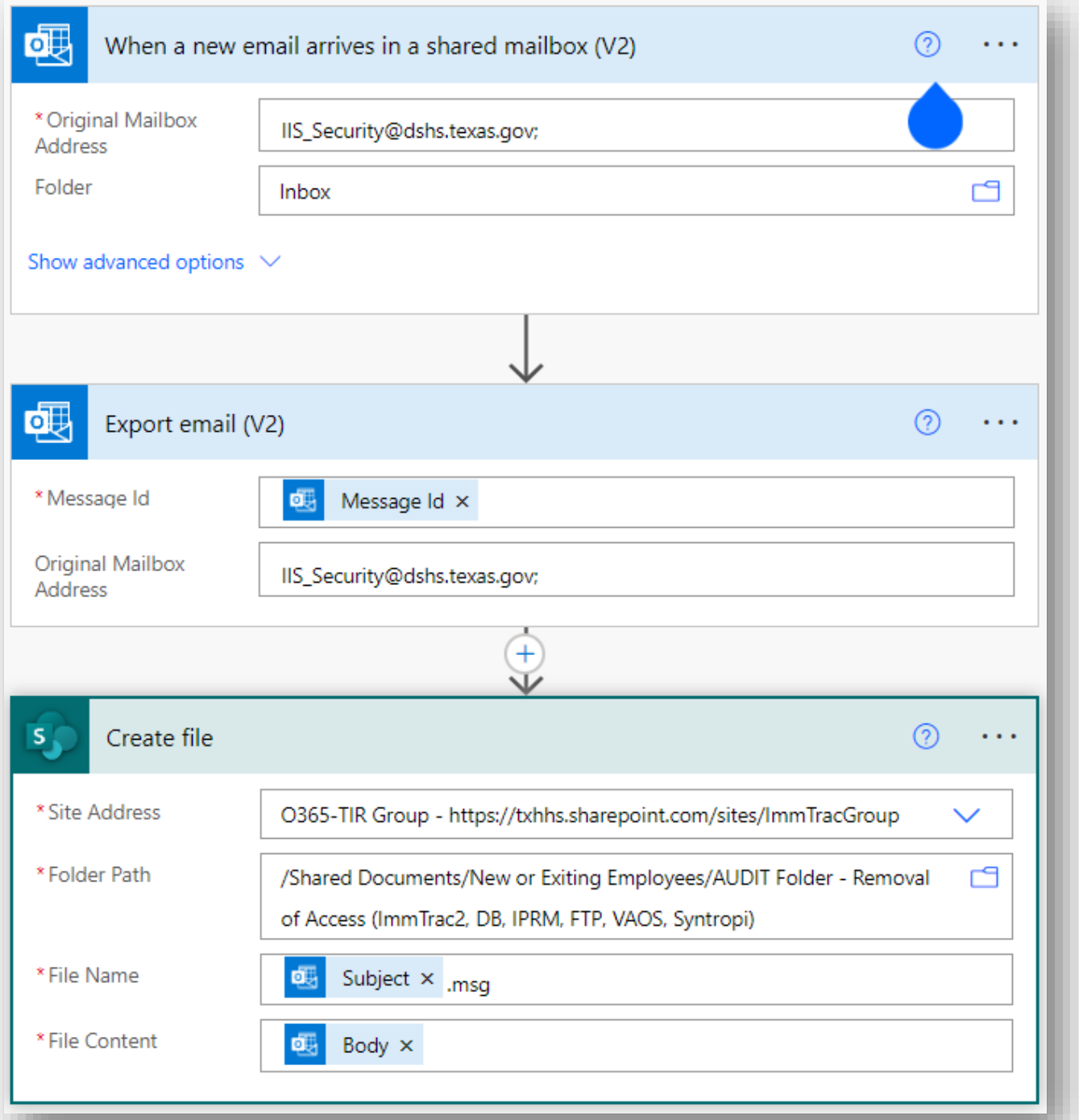
Save approval emails

Save revocation emails

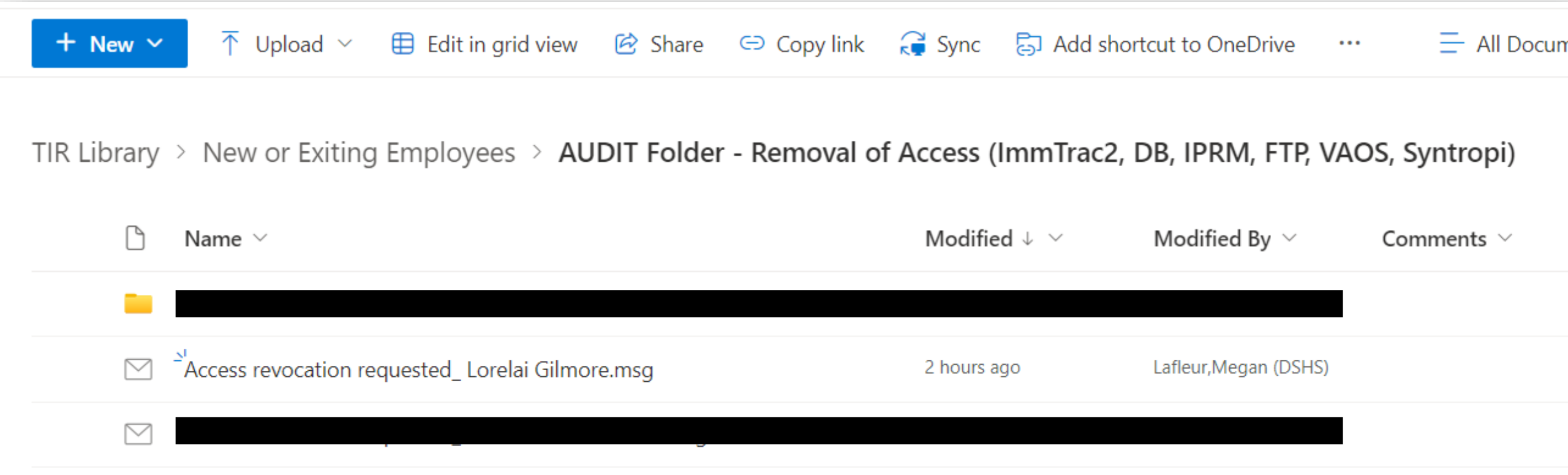
Store Approval Emails



Store Revocation Emails



6. Store Documentation



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
Pending	ACE Branch	✓	Lorelai Gilmore

			Syntropi administrator? (Y/N)	ImmTrac2 access
			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

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!

Adrian Sanvictores
Adrian.Sanvictores@dshs.texas.gov

Megan Lafleur
Megan.Lafleur@dshs.texas.gov