

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



Report Access



Full Access
State



ImmTrac2
Developer

Privileged Users



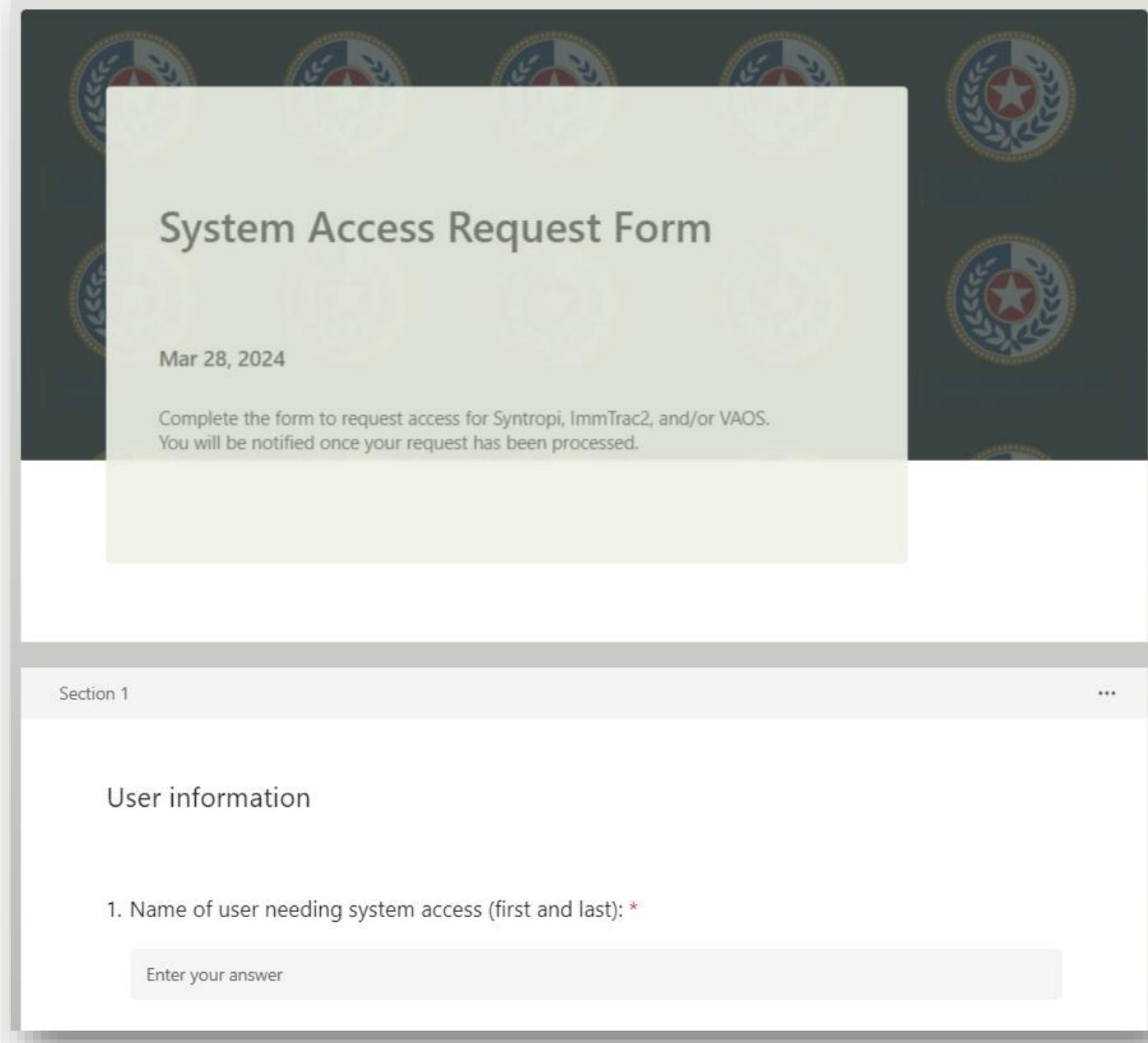
The Solution



- 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



The image shows a screenshot of a Microsoft Forms survey titled "System Access Request Form". The form is dated "Mar 28, 2024" and includes a note: "Complete the form to request access for Syntropi, ImmTrac2, and/or VAOS. You will be notified once your request has been processed." The form is divided into sections: "Section 1" and "User information". The first question in "User information" is "1. Name of user needing system access (first and last): *". A text input field is provided for the answer, with the placeholder "Enter your answer". The background of the form features a repeating circular logo with a star and laurel wreath.

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



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



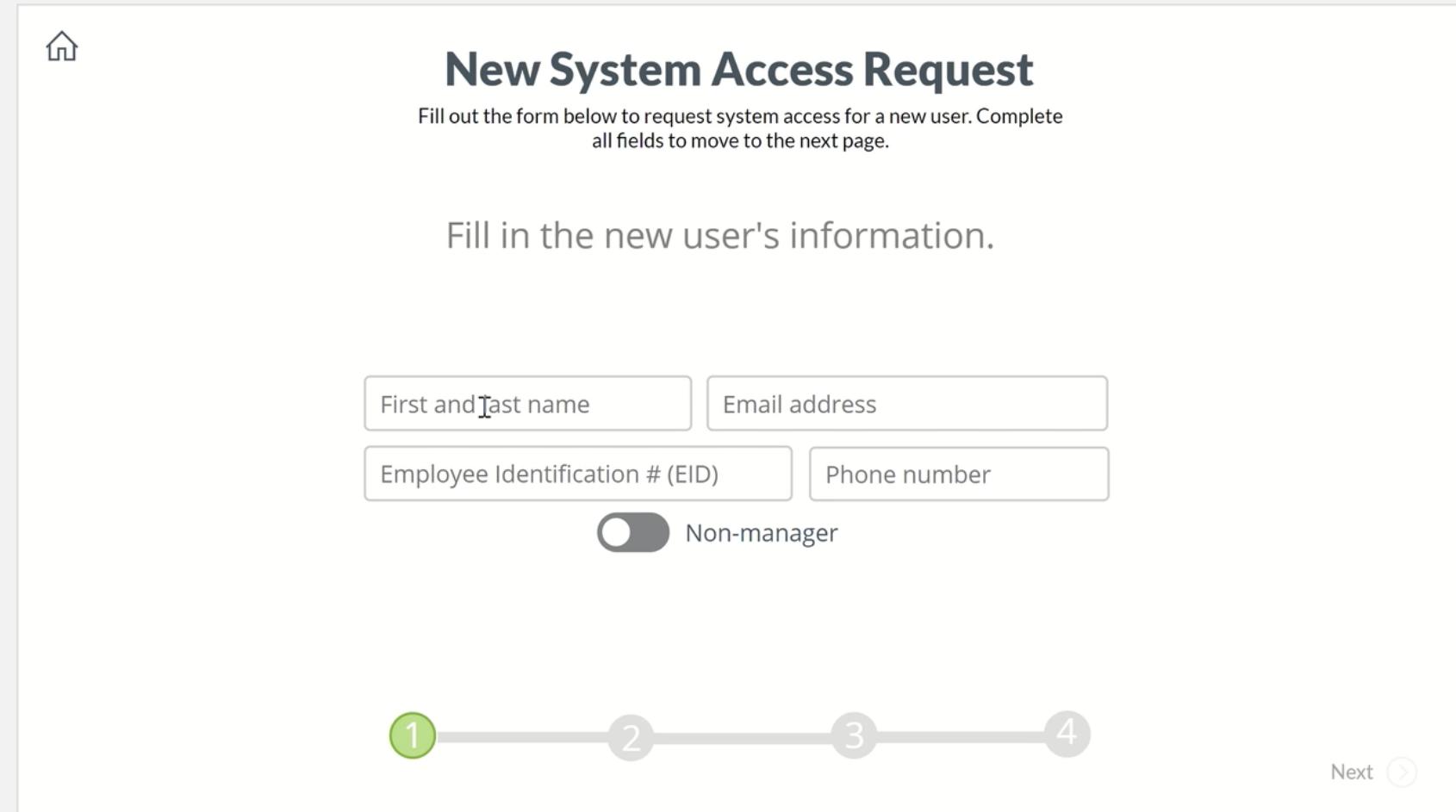
Submit a
new request



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 'New System Access Request' form. At the top, there is a house icon and the title 'New System Access Request'. Below the title, a sub-instruction reads: 'Fill out the form below to request system access for a new user. Complete all fields to move to the next page.' A descriptive text 'Fill in the new user's information.' is centered. The form contains four input fields arranged in a 2x2 grid: 'First and Last name' and 'Email address' in the top row, and 'Employee Identification # (EID)' and 'Phone number' in the bottom row. Below these fields is a toggle switch labeled 'Non-manager'. At the bottom, a horizontal progress bar shows four numbered steps: 1, 2, 3, and 4, with step 1 highlighted in green. A 'Next' button with a right-pointing 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 ★

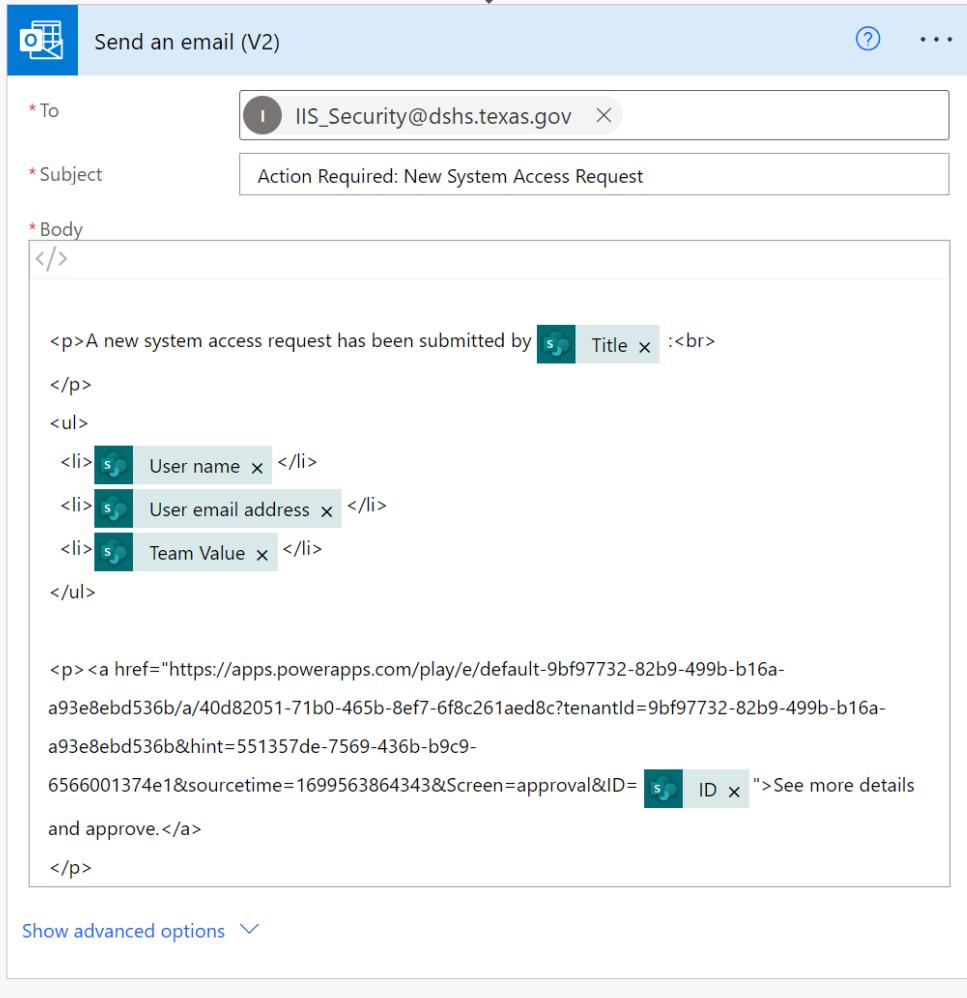
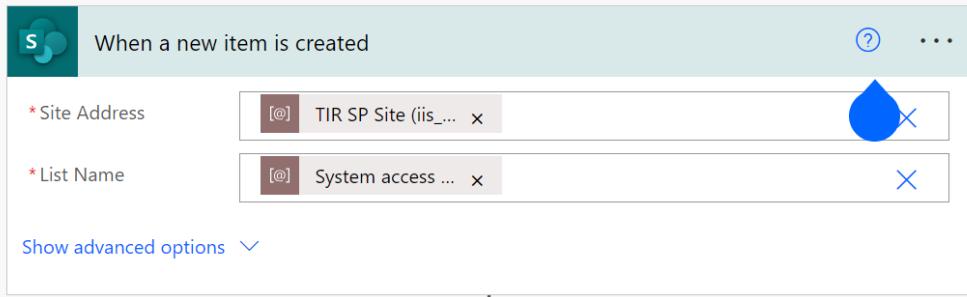
Date of request	Date of approval	Status	Date access provisioned	Team
3/20/2024	3/21/2024	Completed	3/21/2024	IIS Unit: Data Analytics Group
3/21/2024	3/22/2024	Approved		VOU: Vaccine Data and Finance Group
3/27/2024		Pending		IIS Unit: Director's Office
4/4/2024	4/4/2024	Pending	4/5/2024	ACE Branch

3. Send for Approval: Power Automate

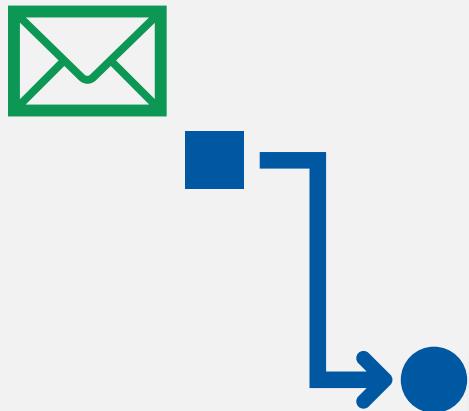


Power
Automate

- 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



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

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.](#)

Reply Reply All Forward ...

Fri 4/5/2024 9:45 AM

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

Welcome,
Megan 

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

 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 I ARA



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

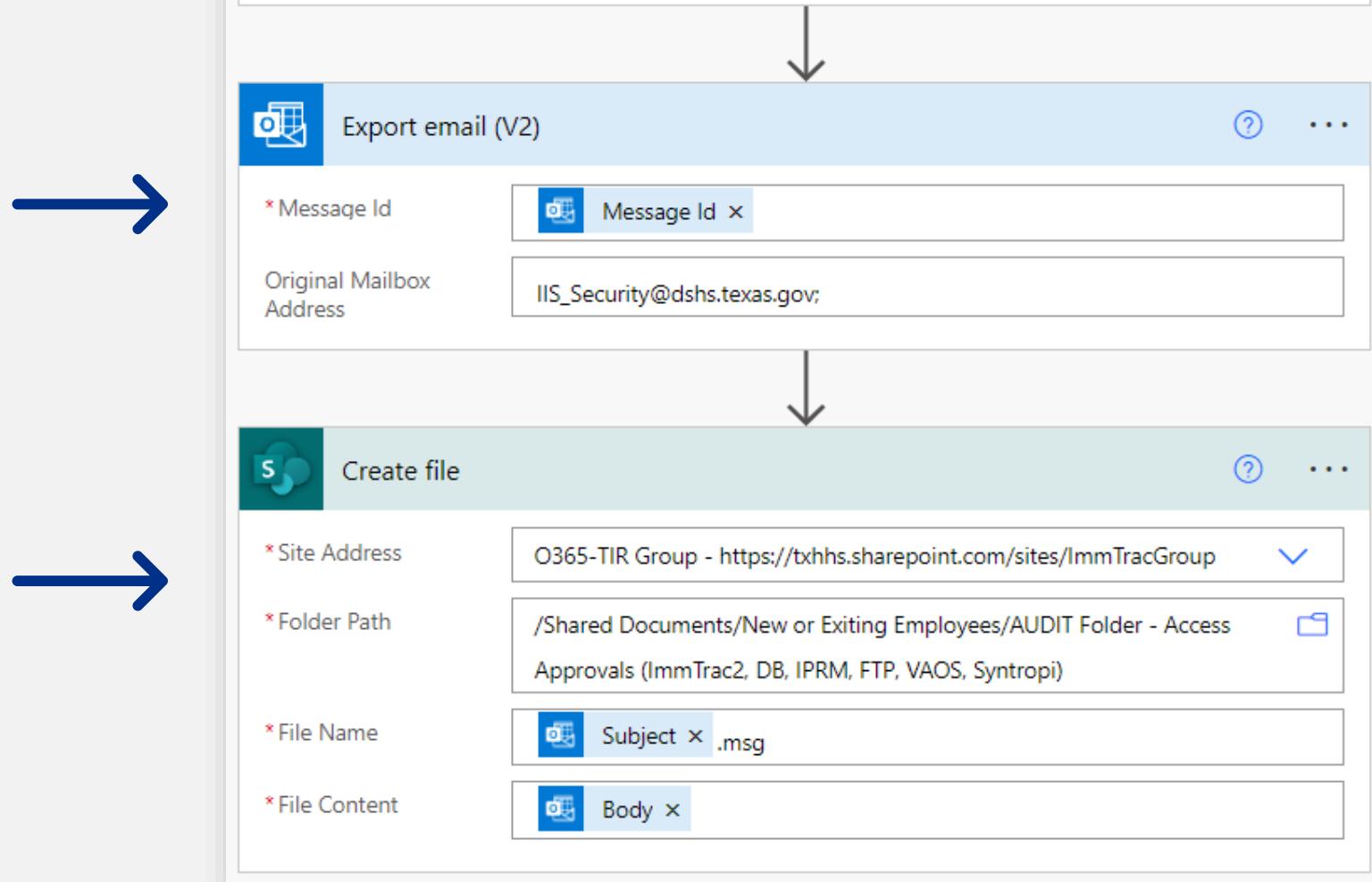


Save approval emails

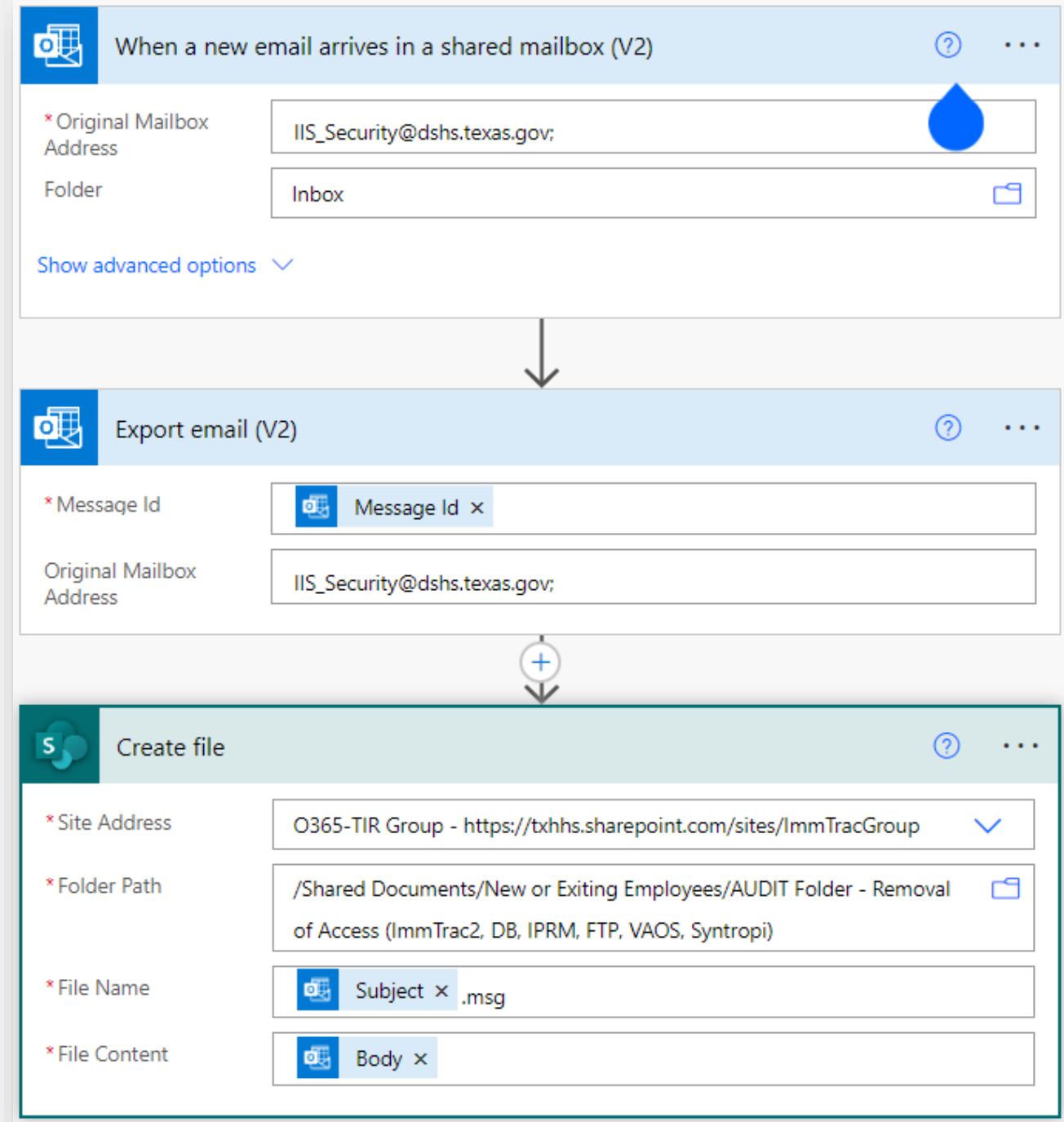


Save revocation
emails

Store Approval Emails



Store Revocation → Emails



6. Store Documentation

Upload Edit in grid view Share Copy link Sync Add shortcut to OneDrive ... All Documents

+ New ▾

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

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

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	ed	Syntropi administrator? (Y/N)	ImmTrac2 access
Pending	ACE Branch	✓	Lorelai Gilmore		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



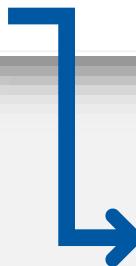
- Permissions set for both application and underlying data (SharePoint)
- Managed by security team
- Custom contribution permission access

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