Guidance for accessing HEE Tableau reporting services for non-HEE users

Quick links

- Users who don't already access HEE Microsoft services should click here *(if you aren't sure – start here).*
- Users who have existing access to HEE Microsoft services (eg Regional Workforce portals in Sharepoint) should click here.
- For troubleshooting issues, including resetting passwords, click here.

Creating a Microsoft account and logging in

To access HEE's Tableau reporting services you will need an account that is linked to Microsoft in order that we can authenticate you.

The step-by-step guides below will explain what you need to do to authenticate your account, whether you have already connected with our Microsoft directory or have yet to do so.

If you have previously been connected with our Microsoft directory (e.g. through access to a workforce Sharepoint portal) then you may not have to create a new account – see ***Logging into an existing Microsoft account and accessing Tableau*** below for a guide on that process. If you aren't sure then start at step 1 below.

If you have any questions about logging in please contact dataservice@hee.nhs.uk.

Step 1: Invitation to join

If you are an existing user of HEE's Tableau services or you have recently requested access for a particular report you should have been sent an invitation to access applications that looks something like the below.

Please check your junk mailbox if necessary.

The invitation will have been sent to the email address we have been given as part of your request or what we already have on your existing HEE Tableau account.

The email address will be sent from invites@microsoft.com.

Health Education England invited you to access applications within their organization Inbox ×
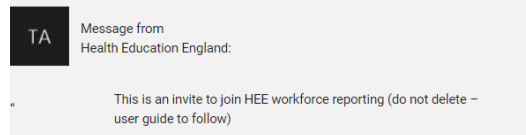
Microsoft Invitations on behalf of Health Education England <invites@microsoft.com>
to HEE.bulktest4

10:34 (4 hours ago)

❗ Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.

Organization: Health Education England
Domain: hee.nhs.uk

This message was provided by the sender and is not from Microsoft Corporation.

TA   Message from
Health Education England:

" This is an invite to join HEE workforce reporting (do not delete –
user guide to follow) "

If you accept this invitation, you'll be sent to https://tableau.hee.nhs.uk.

Accept invitation

Rather than clicking 'accept the invitation' at the bottom of the email it is recommended that you right-click and open in a private/incognito window. This is to ensure you are not signed into any other Microsoft accounts (e.g., personal accounts) when accepting that do not have access to Tableau.

If you do not have an invitation email try the process *Logging into an existing Microsoft account and accessing Tableau* below, and if that doesn't work contact dataservice@hee.nhs.uk.

Step 2: Create your account

When you have accepted the invitation you will be invited to create a Microsoft account linked to your email address.

You will need to choose a password and verify the email using a code send to your inbox. You may also be asked to prove you are not a bot with a puzzle or test. Finally, it will ask you for your country and data of birth to finalise the registration. See screenshots below.

If your account is already associated with HEE's Microsoft services you will be asked to sign in rather than create an account. Please go to the **Logging into an existing Microsoft account and accessing Tableau** guide below for further instructions.

i.   Create account: click next
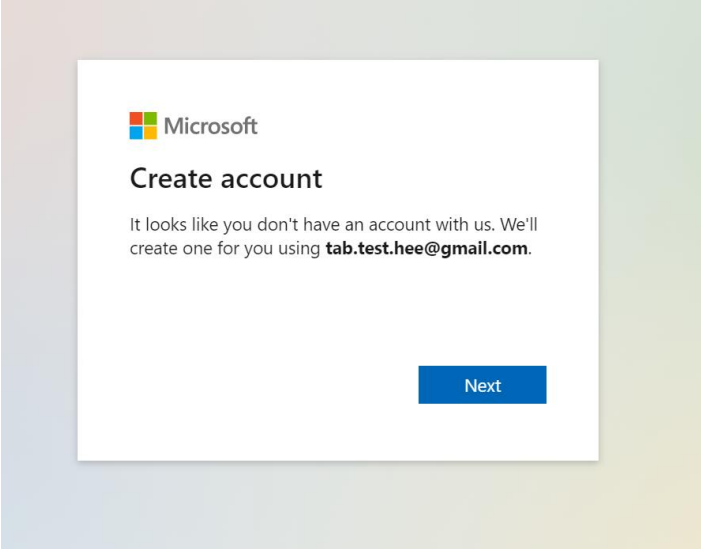
ii.   Create a password for your Microsoft Account
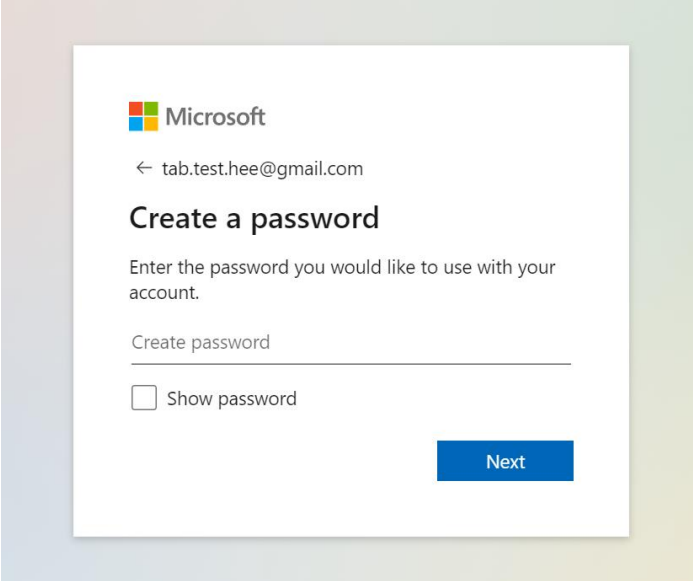
iii.   Verify the email: Microsoft will send you an email with a code which you can use to verify your account. Enter the code in the email into the request box in the browser (examples below)
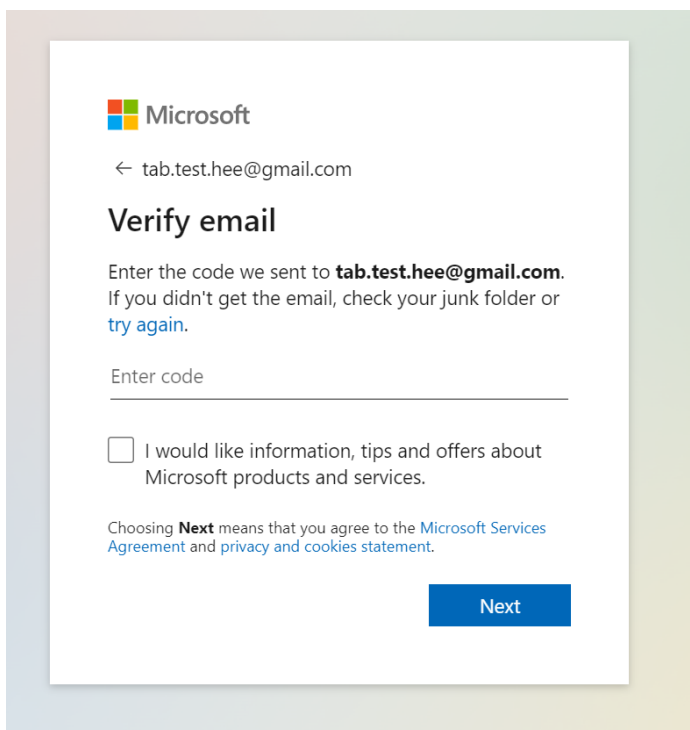
Microsoft account

Verify your email address

To finish setting up your Microsoft account, we just need to make sure that this email address is yours.
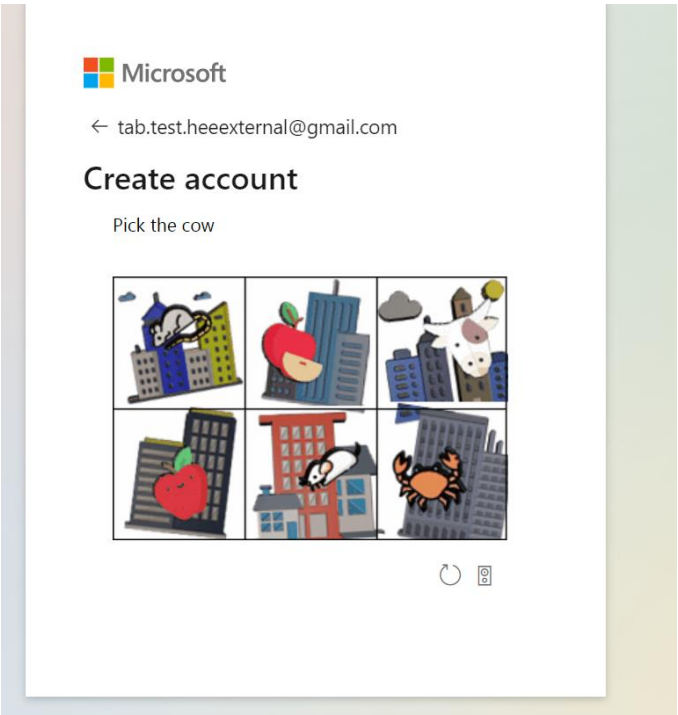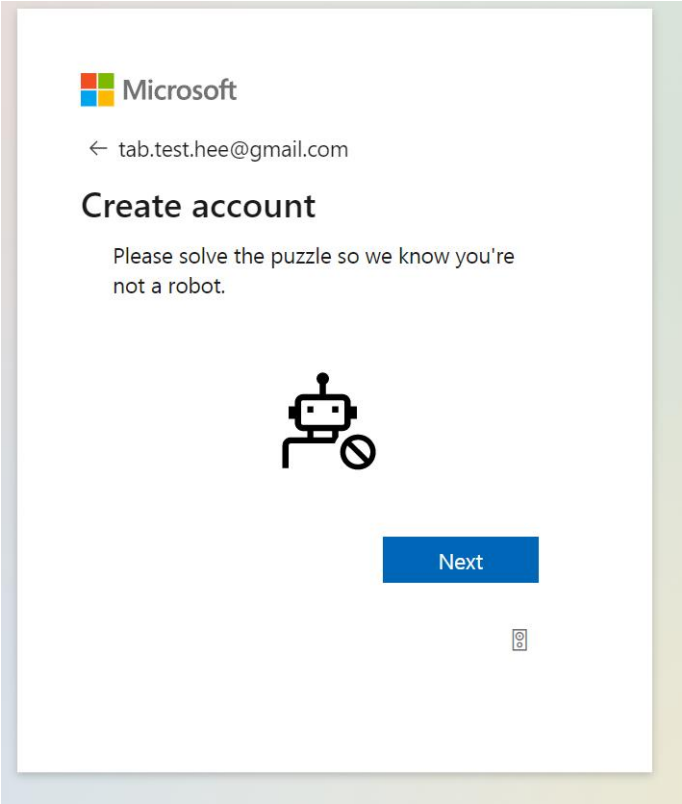
To verify your email address, use this security code: **1097**

If you didn't request this code, you can safely ignore this email. Someone else might have typed your email address by mistake.
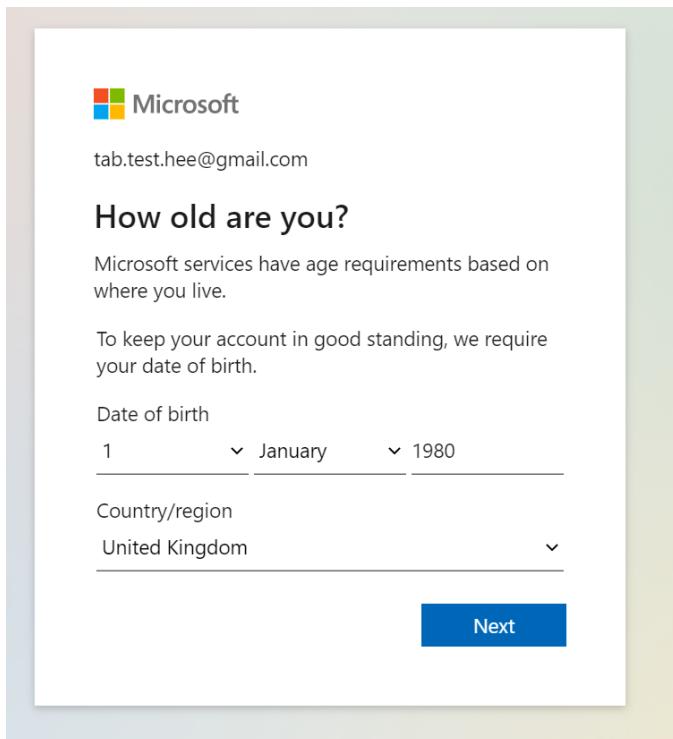
Thanks,
The Microsoft account team

■■ Microsoft

← tab.test.hee@gmail.com

Verify email

Enter the code we sent to **tab.test.hee@gmail.com**. If you didn't get the email, check your junk folder or try again.

Enter code
_____

☐   I would like information, tips and offers about Microsoft products and services.

Choosing **Next** means that you agree to the Microsoft Services Agreement and privacy and cookies statement.

Next

iv.   Solve the puzzle: you will be asked to solve a puzzle to ensure you are not a robot – it will ask you to choose a particular image from a matrix or input some text. You can hear a listening version of the test or select a new test using the icons at the bottom right of the puzzle.
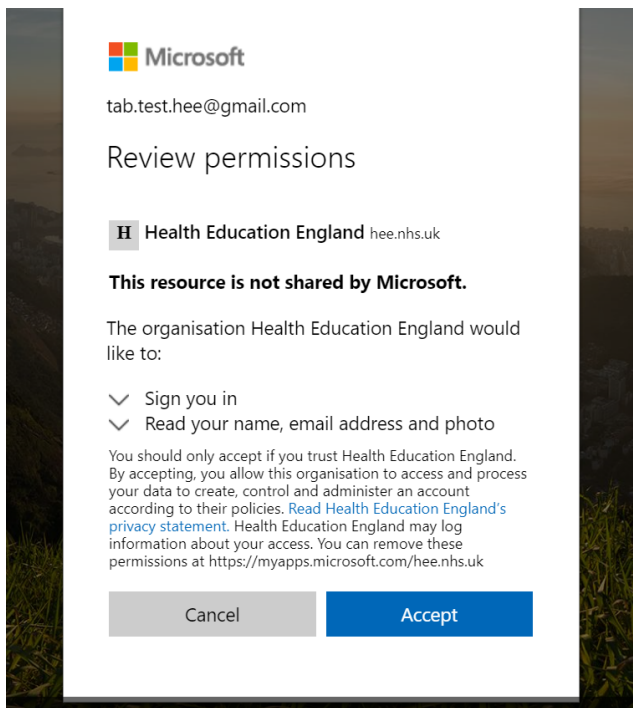
v.   You will be asked to provide some basic details on your age and country/region

vi.   Once you have set up and verified your account please sign in, review and accept the HEE permissions.
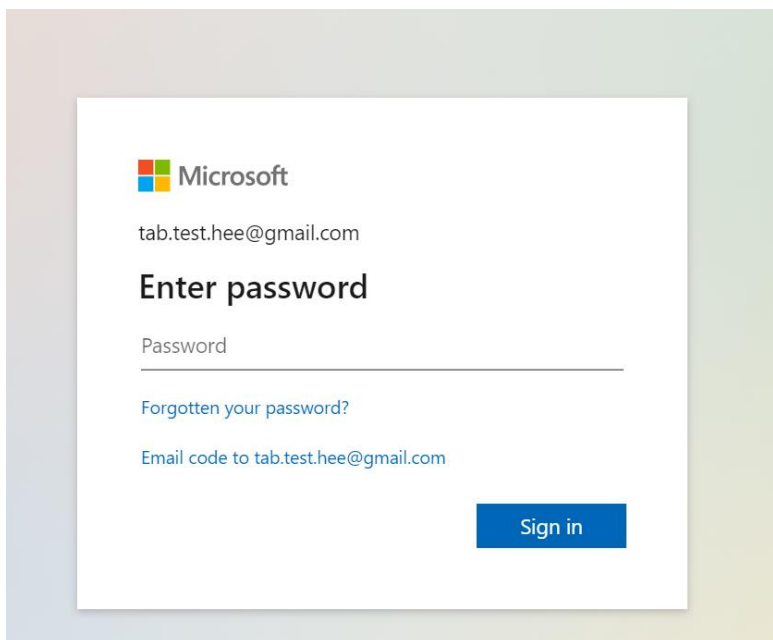

Step 3: Logging into Tableau

When you have registered your account you should be automatically redirected to our Tableau Server. If not, navigate to https://tableau.hee.nhs.uk. If you are still logged into Microsoft you will be automatically logged into Tableau.

If you are not logged in to Microsoft already you may need to log in again:

If you have more than one Microsoft account saved on your browser you may be offered a choice of accounts to sign in with – choose the email account that you have just connected with which received the email invitation.

It can take a little time for HEE's Tableau accounts to synchronise with Microsoft – if the process above does not log you in please wait a while before trying again.

If you are having trouble logging in try opening an incognito window in your browser, navigate to https://tableau.hee.nhs.uk and log in as above. See more troubleshooting options below.

Once you are logged in you will see something like this:
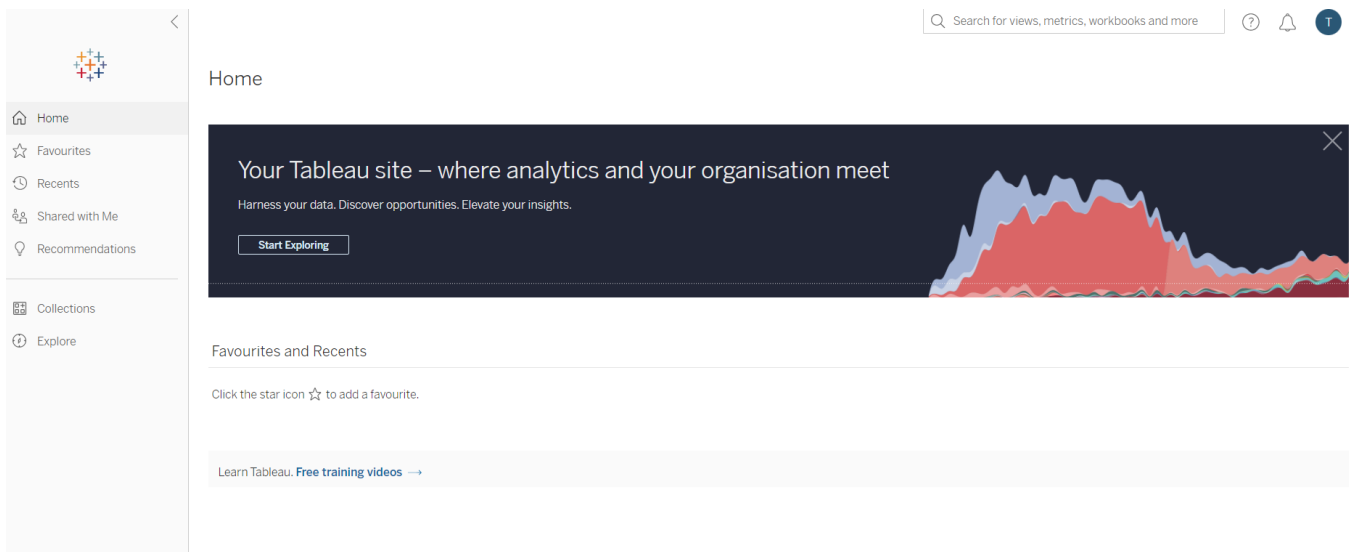
You can view what dashboards have been made available to you via the 'explore' option on the left-hand side.

Once you've set up your account and logged in using an incognito browser you can move to logging in using a standard browser window. **If you have any errors please use the troubleshooting options below.**

Logging into an existing Microsoft account and accessing Tableau

If your account is already associated with HEE's Microsoft Services you will not need to create another account.

You may still receive an invitation to join a group (see step 1 above) and you can use the 'accept invitation' link if so (*it is recommended that you right-click and open in a private/incognito browser to start with*).

If you do not receive an invitation email, but you have been given confirmation that you have been given access then please navigate to https://tableau.hee.nhs.uk and you will be prompted to enter your email address and password.
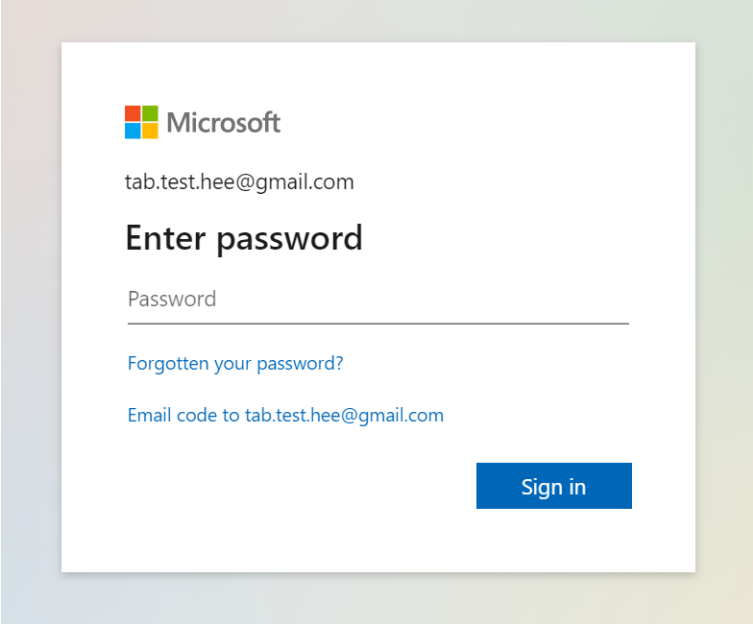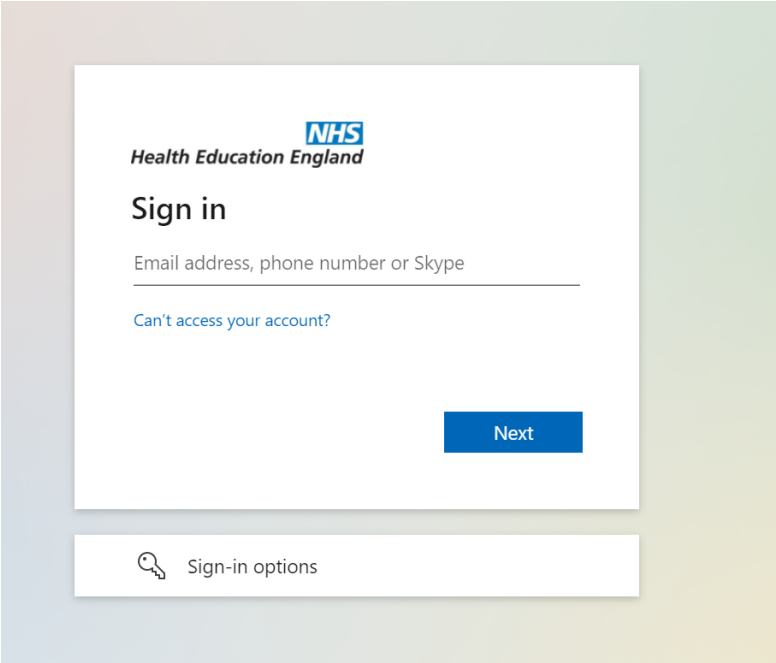
On entering your password you should be logged into your HEE Tableau account and will see the below interface:
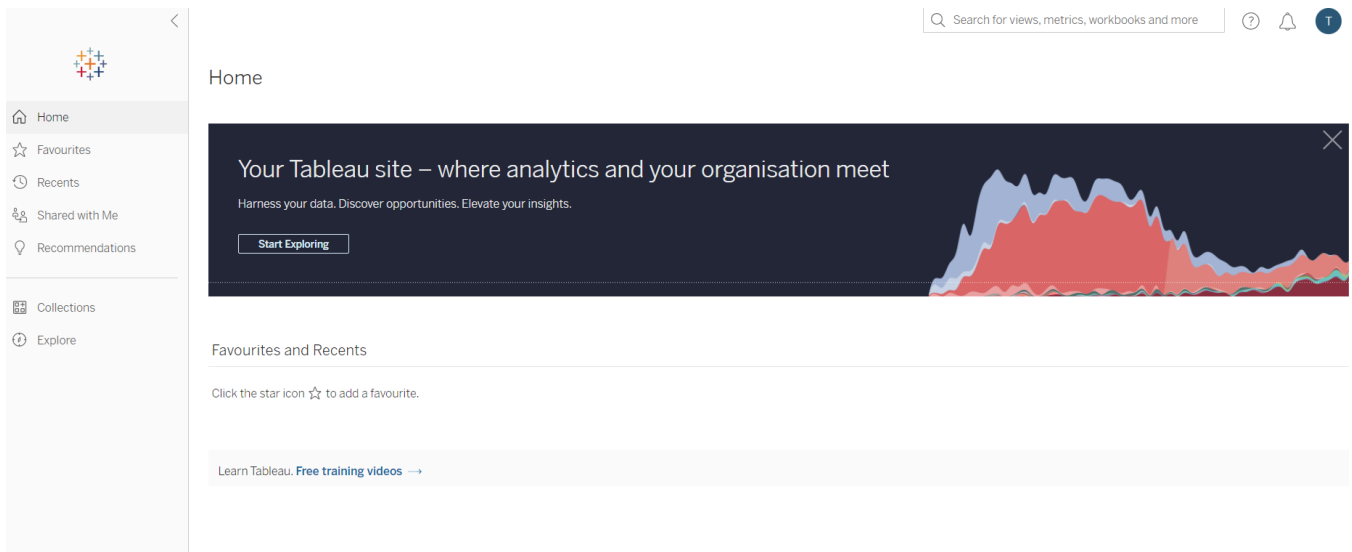
You can view what content has been made available to you via the 'explore' option to the left hand side.

If you see any errors when trying to log in please use the troubleshooting options below.

Troubleshooting

If you are having trouble logging in, particularly if you have another Microsoft account for your organisation, try opening an incognito window in your browser (via the settings menu at the top right), navigate to https://tableau.hee.nhs.uk and log in as above.

If you see an error relating to invalid username or password resetting cookies in your browser may help:
- For **Google Chrome** go to the three dots at the top right of your browser, choose settings > security and privacy > clear browsing data > Select *last 7 days* on time range > select Cookies and other site data > clear data
- For **Microsoft Edge** go to the three dots at the top right of your browser, choose settings > privacy, search and services > clear browsing data > clear browsing data now > Select *last 7 days* on time range > select Cookies and other site data > clear now
- Other browsers may require a slightly different method
- Navigate to https://tableau.hee.nhs.uk and follow the log in instructions.

Clearing the browser cache can also resolve errors
- For **Google Chrome** go to the three dots at the top right of your browser, choose settings > security and privacy > clear browsing data > select Cached images and files > clear data
- For **Microsoft Edge** go to the three dots at the top right of your browser, choose settings > privacy, search and services > clear browsing data > clear browsing data now > select cached images and files > clear now
- Other browsers may require a slightly different method
- Close your browser, reopen and log in again.

Other checks

Check you can log into Microsoft Online with the credentials you have created: https://myapplications.microsoft.com/.
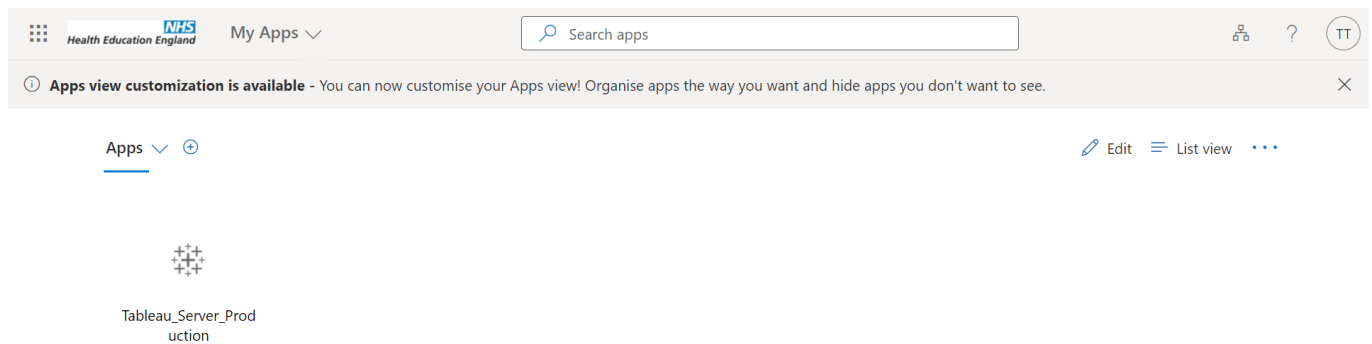

You can reset your password by going to your initials at the top right corner and choosing 'view my account'. If your account is registered you will see 'Tableau_Server_Production' listed amongst your apps.

Check whether you can log into Tableau: https://tableau.hee.nhs.uk/

If you are still having trouble logging in contact dataservice@hee.nhs.uk.

Reset/change password

You can **change your password** by logging into https://myapplications.microsoft.com/ with the credentials you have created, going to your initials at the top right corner and choosing 'view my account'. Then you can choose *password* from the left-hand menu to make a change.
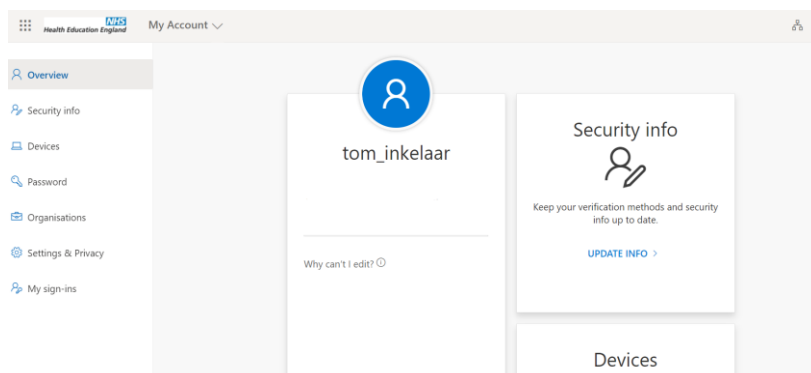

If you do not know or have forgotten your password **you can reset it** with the below instructions.

Open an incognito/InPrivate window on your browser (via the settings menu at the top right-hand corner) and navigate to https://tableau.hee.nhs.uk/. When there you will be prompted to fill in your credentials, but instead please click the *'can't access your account'* option.

You'll be taken to an option to choose a work/school or personal account. If you have an organisational account (e.g NHS.net, Trust) try the former. If it is a personal email address (e.g. Gmail, Outlook) please use the latter.
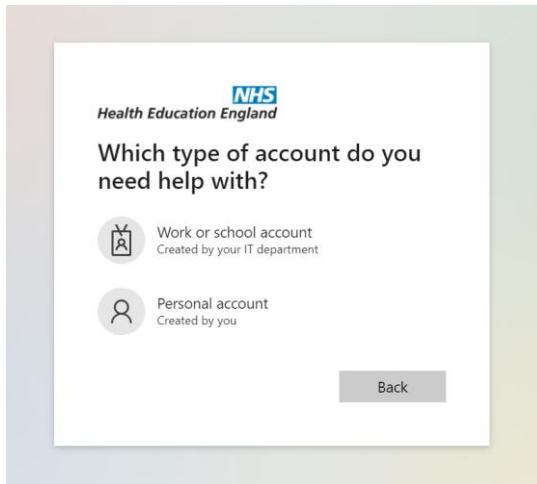
Follow the instructions on either option to reset your password. If you have any issues please contact dataservice@hee.nhs.uk.