

New York State Sepsis Care Improvement Initiative Reports – Tableau Multi-factor Authentication User Guide

This document provides step-by-step instructions for setting up multi-factor authentication (MFA) for access to the IPRO MFA-enabled Tableau Webserver and changing or resetting your Microsoft account password.

Please note: The screenshots in this guide were captured using a specific device and version of the Microsoft Authenticator app. Microsoft periodically updates the app, and the interface may differ slightly between iPhone and Android devices or across app versions. These differences should not affect the overall setup process. If you have questions or experience issues at any point in this process, please contact the [Helpdesk](#) for assistance.

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Key Definitions

- **IPRO MFA-enabled Tableau Webserver** – The website where IPRO hosts Tableau reports for users to access the Adult and Pediatric Quarterly and Data Quality Reports. The link to the IPRO MFA-enabled Tableau Webserver is <http://ny-tableau.ipro.org>.
- **Authorized Users** – Users who have been invited to access the IPRO MFA-enabled Tableau Webserver. Authorized users are managed by IPRO. Currently, only active

Primary Users designated for each facility on the Sepsis Portal are able to be granted authorization. If you have any questions, please [submit a Helpdesk ticket](#).

- **Microsoft Account** – A personal login (email and password) that unifies access to Microsoft’s products and services. In this context, your institutional email address should be used to login to your Microsoft Account.

Setting Up MFA for IPRO MFA-enabled Tableau Webserver

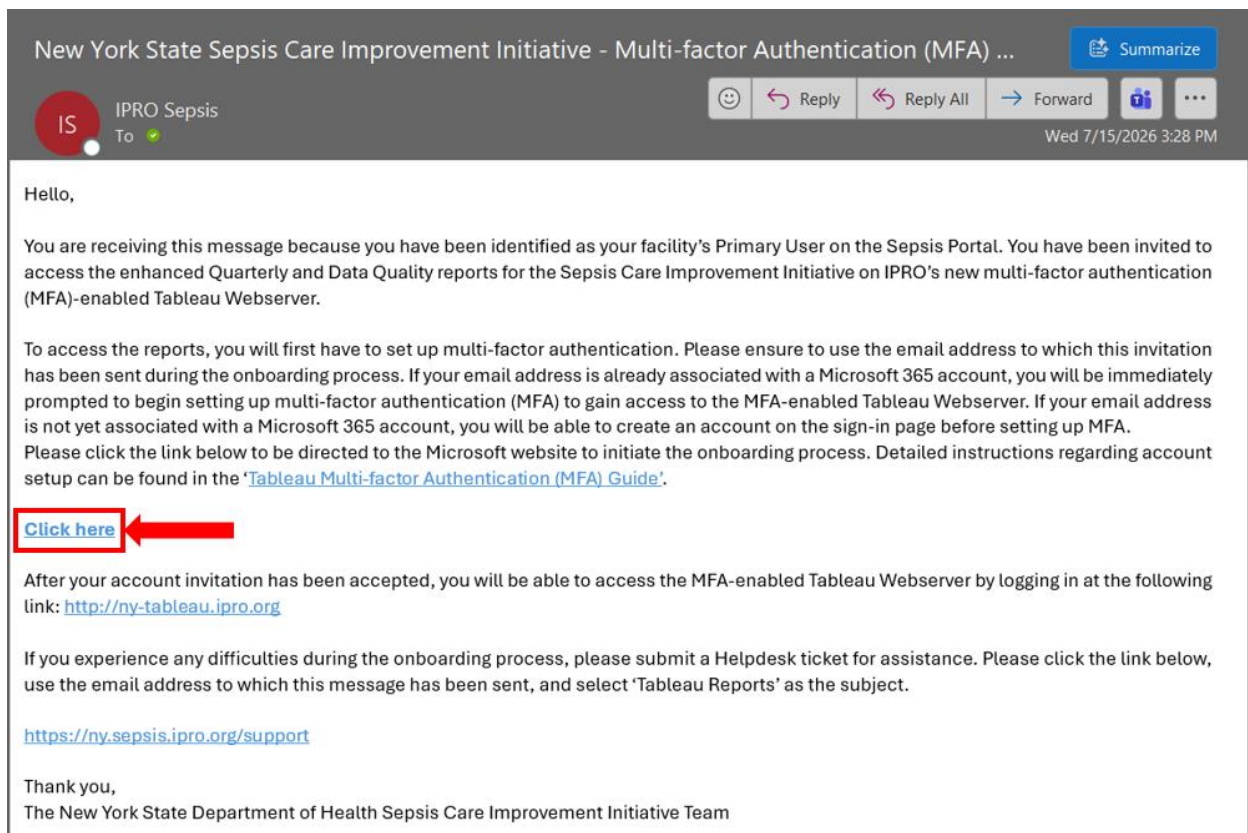
To log in to the IPRO MFA-enabled Tableau Webserver, all users must verify their identity using multi-factor authentication (MFA).

The default method of identity verification via MFA involves using the Microsoft Authenticator app. If users are unable to download the Microsoft Authenticator app, SMS (text message) identity verification is available upon request.

Step 1: Accept Your Tableau Invitation

Authorized users will receive an email from “IPRO Sepsis <sepsis@ipro.org>”

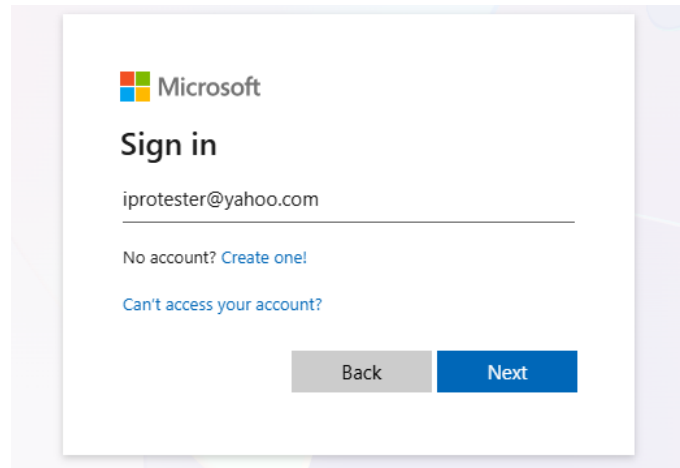
1. Open the email and click [‘Click here’](#) to begin the onboarding process.



Step 2: Login to or Create Microsoft Account

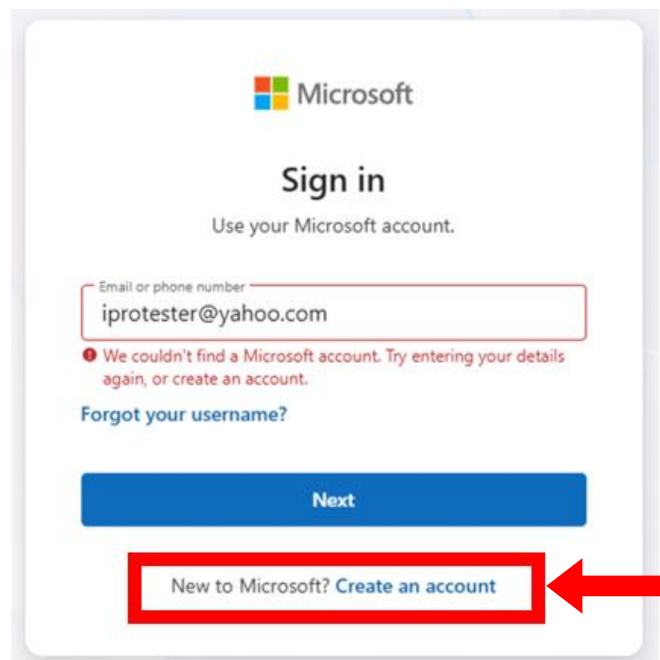
After clicking to begin the onboarding process in Step 1, verify whether your institutional email is already linked to a Microsoft account:

1. On the [Microsoft login page](#), enter your institutional email address.



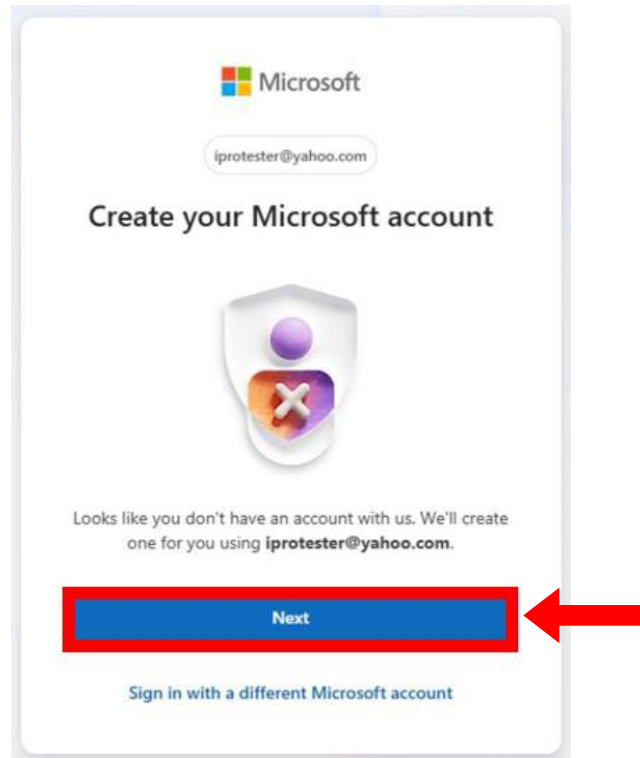
The image shows a Microsoft sign-in page. At the top is the Microsoft logo. Below it is the text "Sign in". A text input field contains the email address "iprotester@yahoo.com". Below the input field are two links: "No account? Create one!" and "Can't access your account?". At the bottom are two buttons: "Back" and "Next".

2. If prompted to enter your password or are able to proceed automatically (e.g., if you are already logged in), you have a Microsoft account and can skip to 'Step 3: Grant Permissions and Setup MFA'.
3. If prompted that a Microsoft account could not be found using your email address, select '**Create an account**' and follow the instructions using your institutional email address. You may be asked to enter a verification code sent to your email.

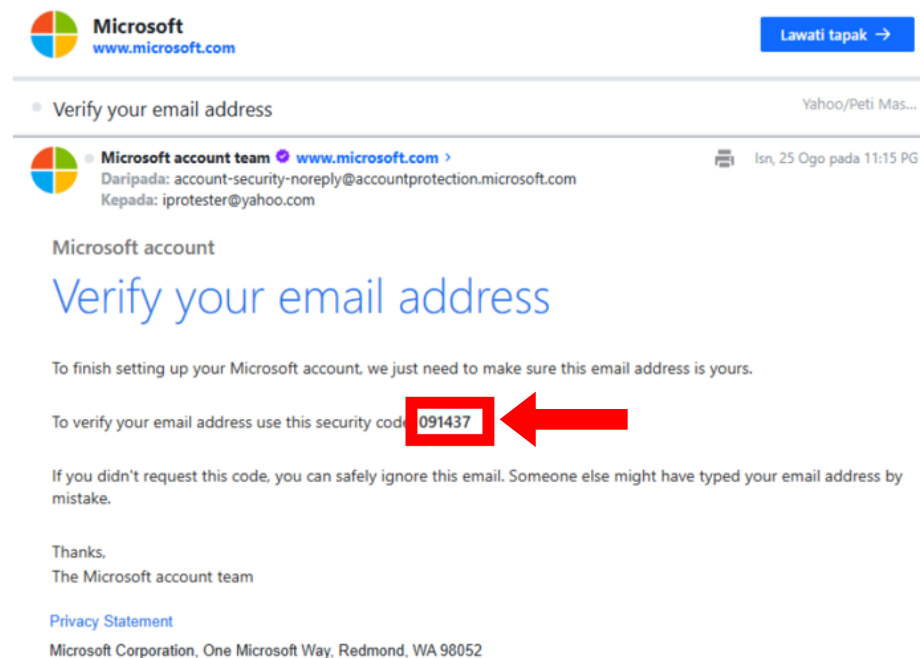


The image shows a Microsoft sign-in page with an error message. At the top is the Microsoft logo. Below it is the text "Sign in" and "Use your Microsoft account.". A text input field contains the email address "iprotester@yahoo.com". Below the input field is a red error message: "We couldn't find a Microsoft account. Try entering your details again, or create an account.". Below the error message is a link: "Forgot your username?". At the bottom are two buttons: "Next" and "New to Microsoft? Create an account". The "New to Microsoft? Create an account" button is highlighted with a red box and a red arrow points to it from the right.

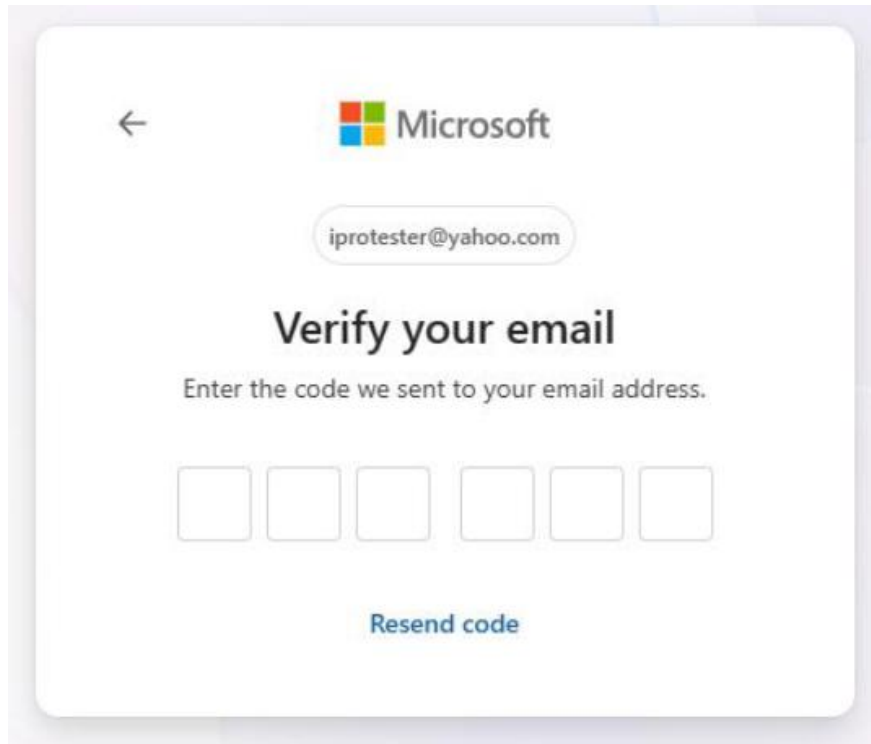
4. Click **'Next'** to begin creating a Microsoft account.



5. Microsoft will verify the email address by sending an email to the address with a security code. Check your email to receive the security code.

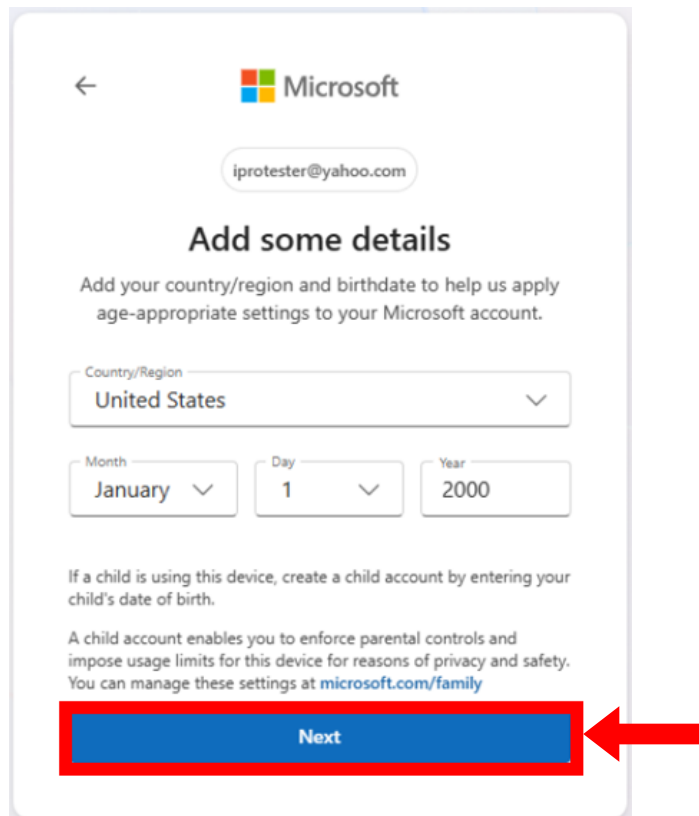


6. Enter the security code sent to your email address in the window below.



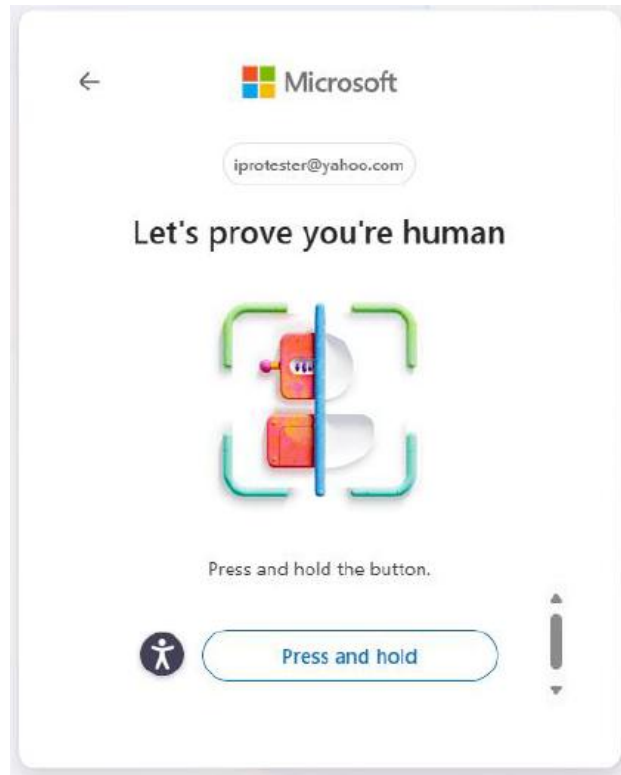
The screenshot shows a Microsoft account verification screen. At the top left is a back arrow. The Microsoft logo is at the top center. Below it, the email address 'iprotester@yahoo.com' is displayed in a rounded rectangle. The main heading is 'Verify your email', followed by the instruction 'Enter the code we sent to your email address.' Below this is a row of six empty square boxes for entering the security code. At the bottom center is a blue link that says 'Resend code'.

7. Provide additional account information as requested and click **'Next'**.

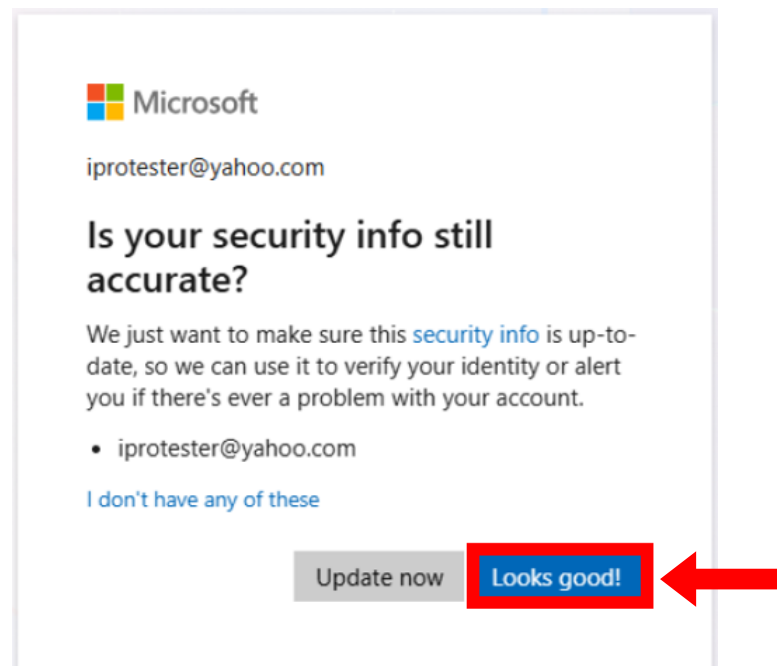


The screenshot shows a Microsoft account setup screen titled 'Add some details'. At the top left is a back arrow. The Microsoft logo is at the top center. Below it, the email address 'iprotester@yahoo.com' is displayed in a rounded rectangle. The main heading is 'Add some details', followed by the instruction 'Add your country/region and birthdate to help us apply age-appropriate settings to your Microsoft account.' Below this are three input fields: a 'Country/Region' dropdown menu showing 'United States', a 'Month' dropdown menu showing 'January', a 'Day' dropdown menu showing '1', and a 'Year' dropdown menu showing '2000'. Below these fields is a paragraph of text: 'If a child is using this device, create a child account by entering your child's date of birth. A child account enables you to enforce parental controls and impose usage limits for this device for reasons of privacy and safety. You can manage these settings at microsoft.com/family'. At the bottom is a blue button labeled 'Next', which is highlighted with a red rectangular border and a red arrow pointing to it from the right.

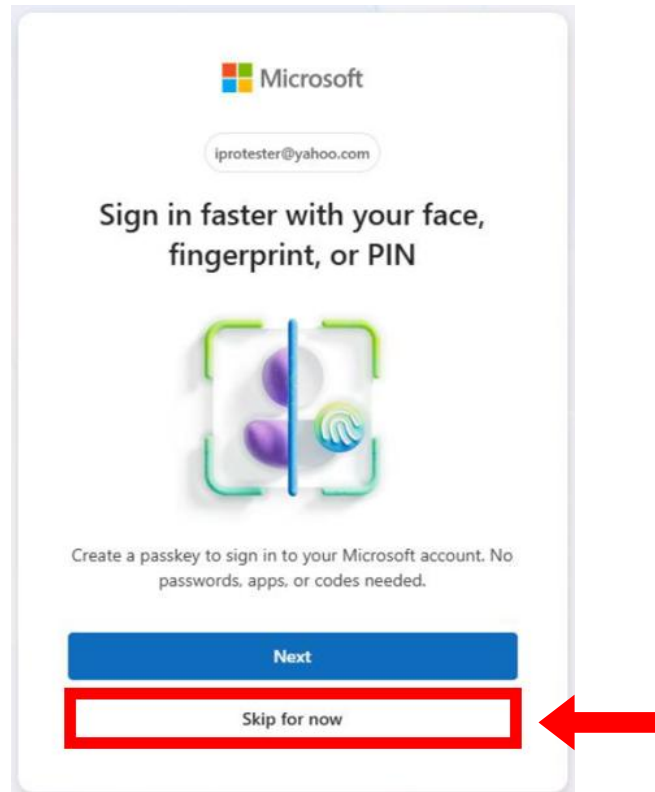
8. Complete the challenge to prove you are human.



9. Confirm that your security info is accurate. If it is accurate, click '**Looks good!**'



10. When prompted to create a passkey, click **'Skip for now'**

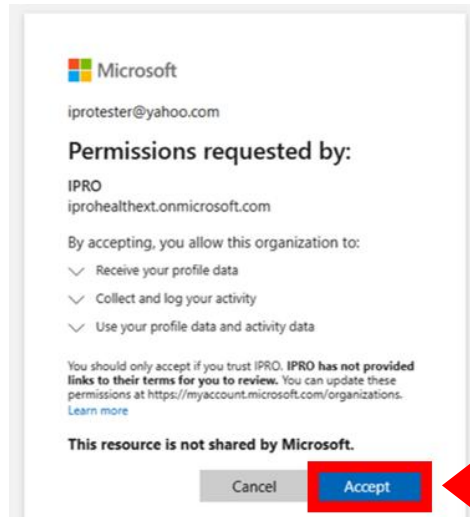


11. Upon successfully creating your account, the Microsoft website will guide you through the process of setting up MFA.

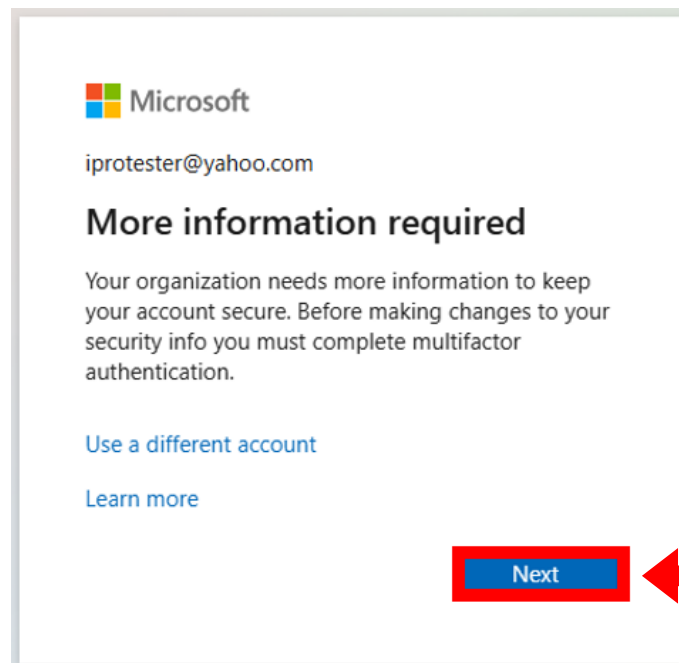
Step 3: Grant Permissions and Setup MFA

After completing Step 2, the Microsoft website will prompt you to grant account permissions and begin the process for setting up MFA.

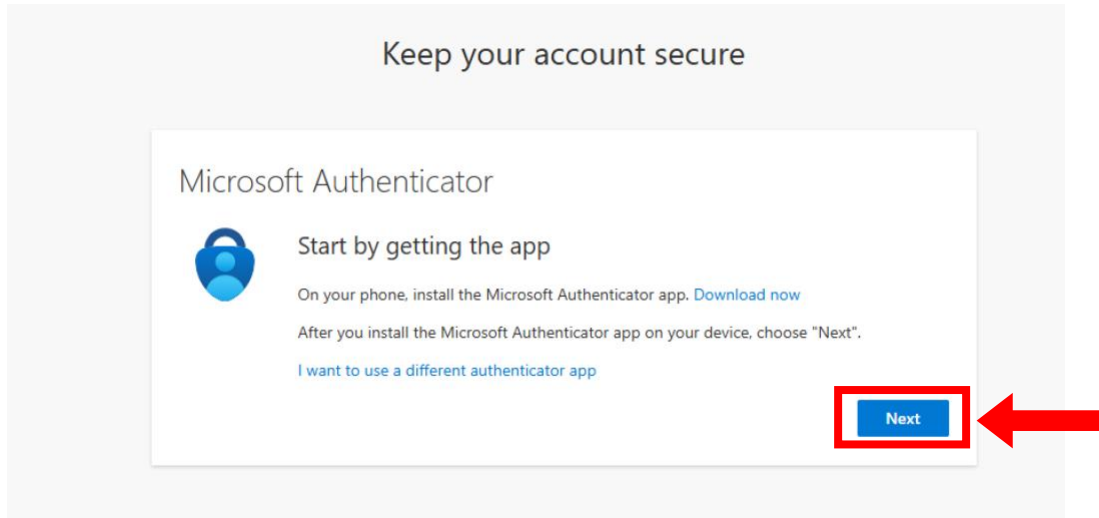
1. Follow the prompts on the Microsoft website to proceed with the onboarding process.
 - a. Click **'Accept'** to grant account permissions to IPRO. This allows IPRO to connect your Microsoft account to IPRO's MFA Tableau Webserver.



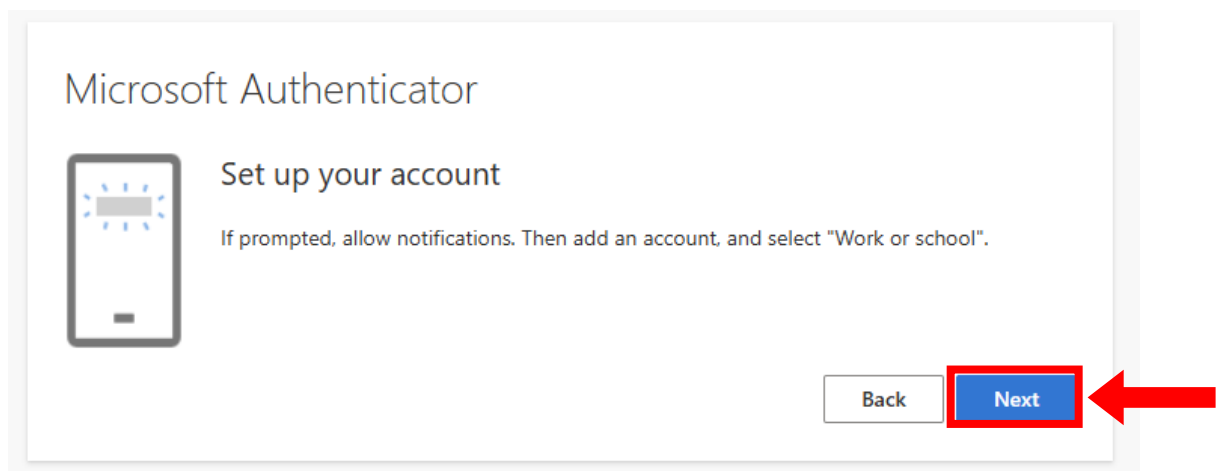
- b. Begin the process for setting up multifactor authentication by clicking **'Next'**



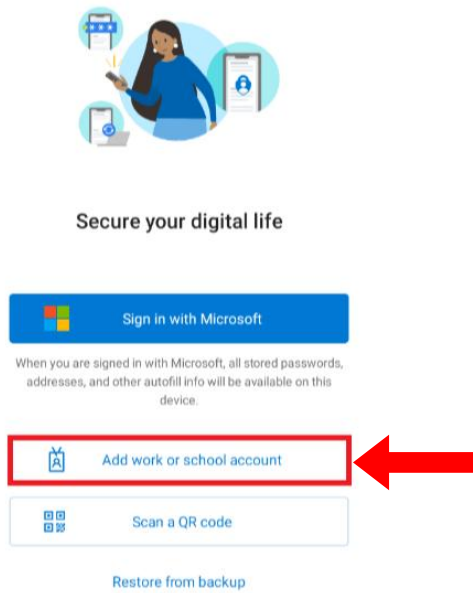
2. Download the Microsoft Authenticator app. The app is available on [Google Play](#) (Android) and the [App Store](#) (iPhone).



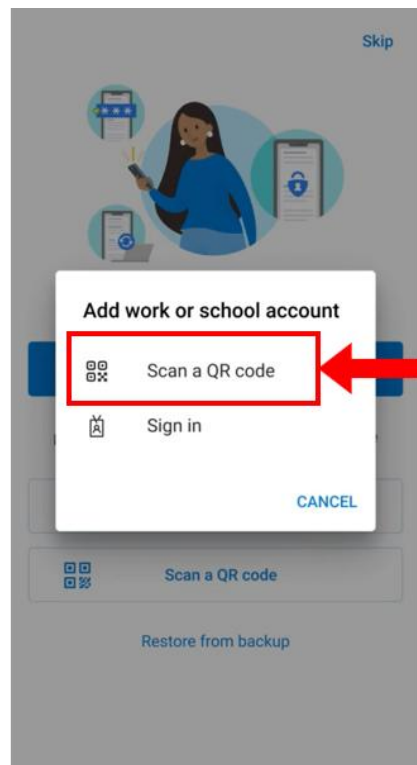
3. Follow the instructions as prompted by the Microsoft website to begin setting up MFA. Please note: The Microsoft Authenticator app experience may vary slightly depending on your device (iPhone or Android), operating system version, and updates released by Microsoft. While the appearance of some screens may differ from the screenshots shown in this guide, the steps and options described remain the same. Follow the on-screen prompts to complete the setup process.
 - Click '**Next**' on the Microsoft website in your web browser.



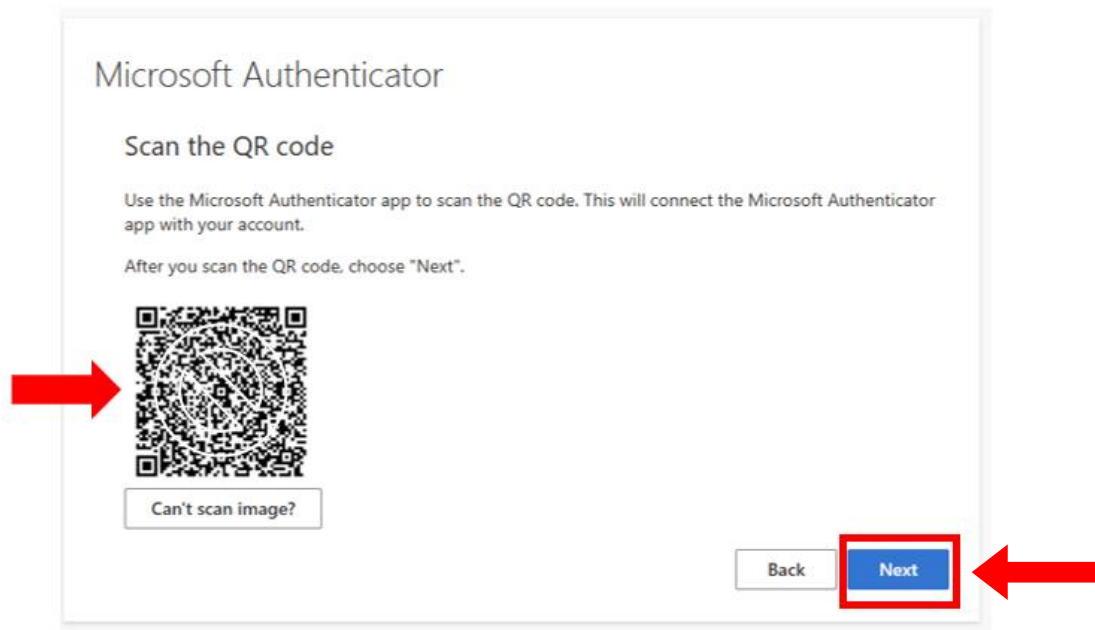
- Open the app on your device, and select **'Add work or school account'**



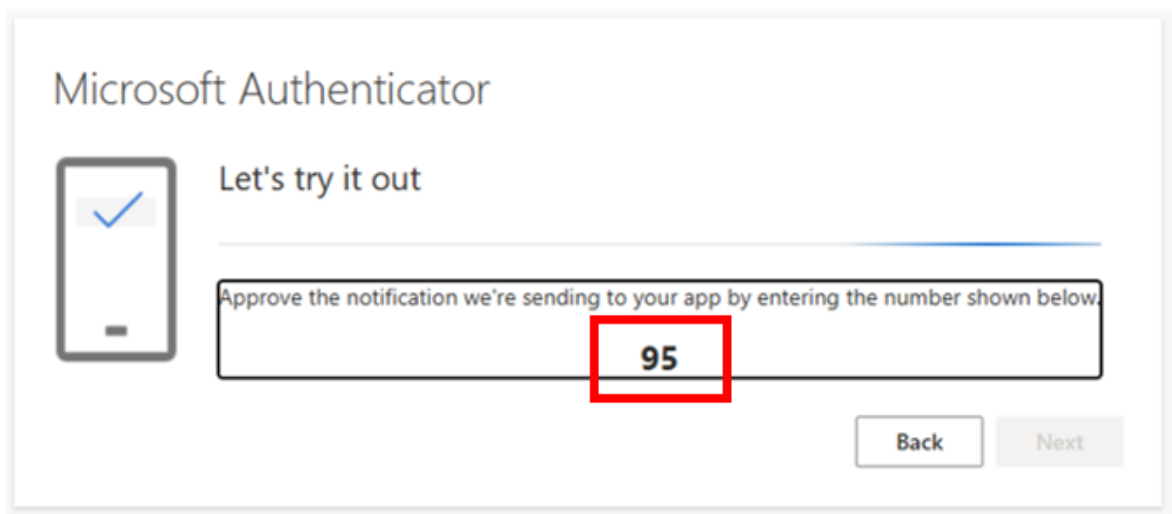
- After selecting 'Add work or school account,' your device will prompt you to either 'Sign in' or 'Scan a QR code.' Select **'Scan a QR code.'**



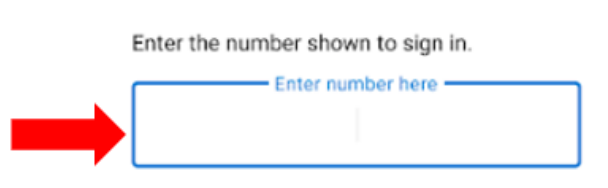
4. Use your device to take a picture of the QR code displayed in your web browser to connect the Microsoft Authenticator app with your Microsoft account. Click **'Next'** once you have scanned the QR code.



5. Confirm the connection between your Microsoft account and the Microsoft Authenticator app.
 - o The Microsoft website in your web browser should display a 2-digit number



- The Microsoft Authenticator app should prompt you to enter the number displayed on the Microsoft website. Enter the 2-digit number displayed on the Microsoft website into the Microsoft Authenticator app.

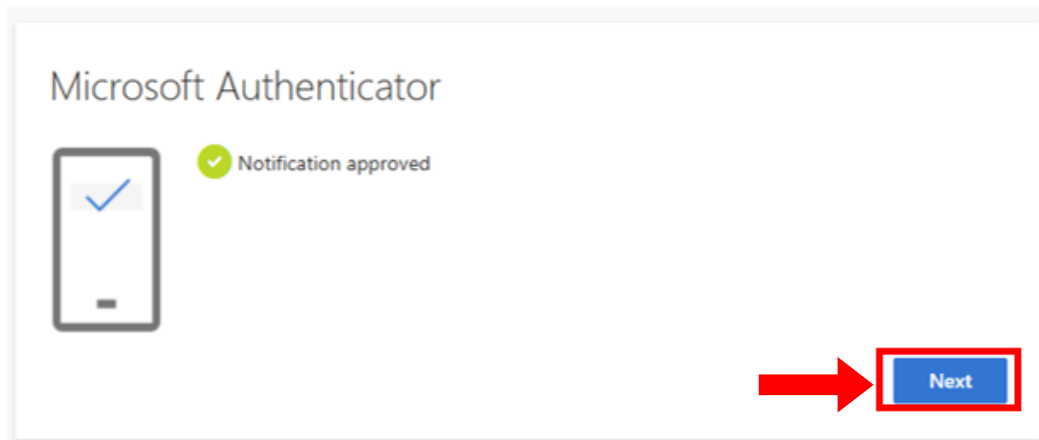


Enter the number shown to sign in.

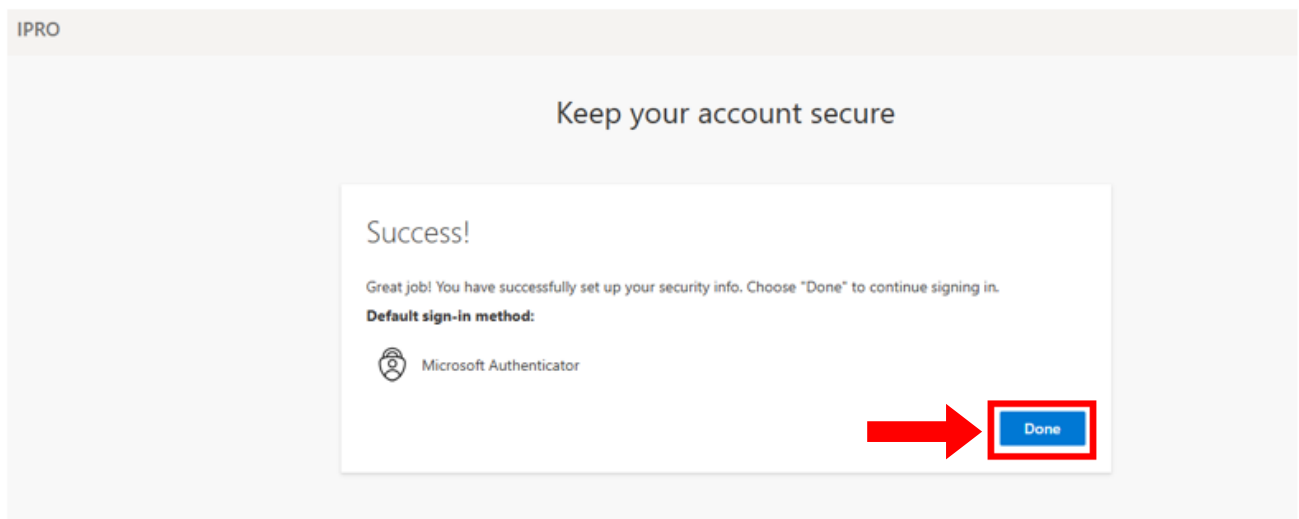
Enter number here

A red arrow points to the input field.

6. If you successfully activated your account using Microsoft Authenticator, the Microsoft website in your web browser should let you know that your setup was successful.
 - Click **'Next'**

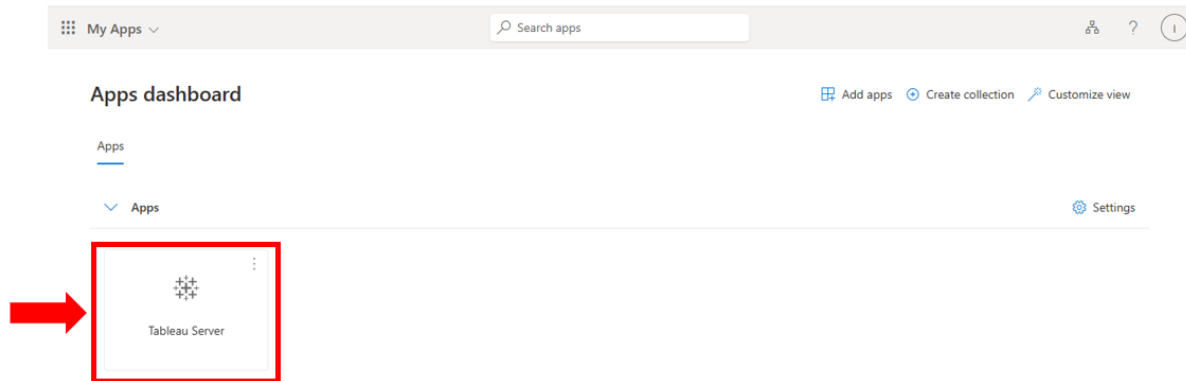


- Click **'Done'** to complete the setup process



Step 4: Access the IPRO MFA-enabled Tableau Webserver

1. After completing the MFA setup process, users will be directed to the Microsoft Apps Dashboard.
 - Click 'Tableau Server' to be directed to the IPRO MFA-enabled Tableau Webserver



2. Before accessing the IPRO MFA-enabled Tableau Webserver, all users must accept the IPRO Terms of Use.
 - Expand and read the 'IPRO Attestation for ny-tableau.ipro.org,' then click **'Accept.'** Please note that you **must expand the Terms of Use** before clicking **'Accept.'**



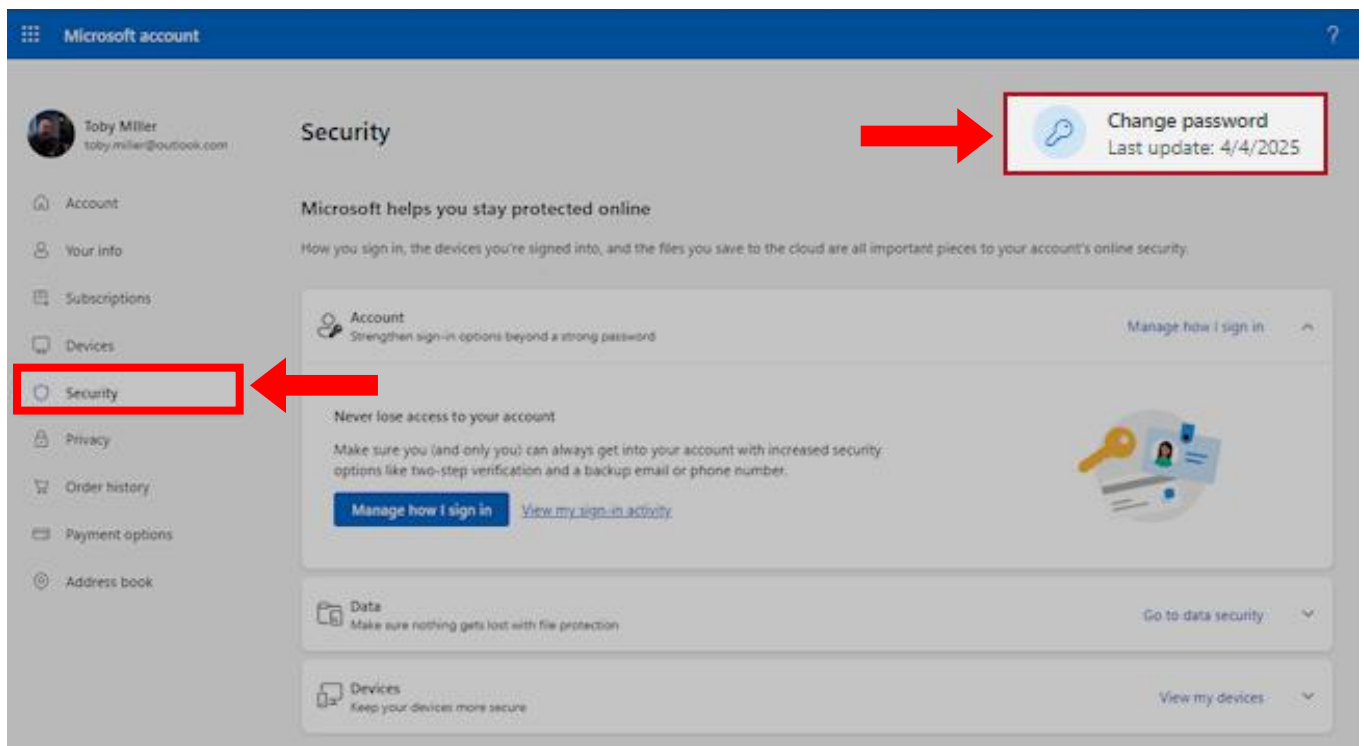
3. The website will redirect you to the IPRO MFA-enabled Tableau Webserver.

Change or Reset Your Microsoft Account Password

Change Password

To change your password:

1. Log into the [Microsoft Accounts Portal](#)
2. Click **'Security'** in the left-hand sidebar
3. Select **'Change Password,'** and input your new password

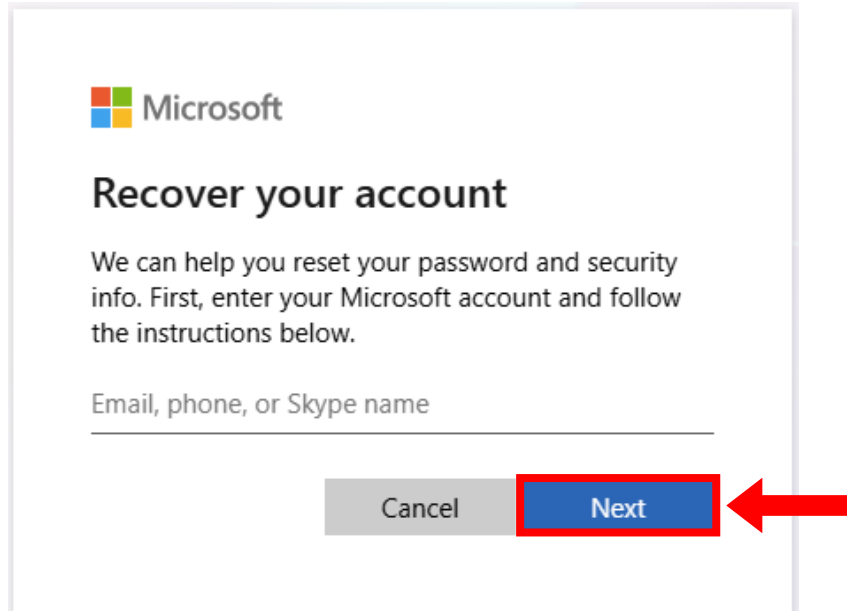


Detailed instructions are available on the Microsoft website [here](#).

Reset Password

If you forget your Microsoft account password and need to reset it:

1. In any web browser, go to the [Reset password](#) page.
2. Enter your email address into the 'Recover your account' prompt and click 'Next.'



Microsoft

Recover your account

We can help you reset your password and security info. First, enter your Microsoft account and follow the instructions below.

Email, phone, or Skype name

Cancel Next

3. Follow the instructions as prompted by the website to reset your password.