

## Tableau Frequently Asked Questions (FAQs)

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### General Questions

#### 1. How do I access the Tableau Enterprise Server site?

You can access the Tableau Finance reporting site via the following link:

<https://bireporting.rutgers.edu/> or the new Tableau tile on your [my.rutgers.edu](https://my.rutgers.edu) home page.

#### 2. Will there be an app on the myRutgers portal that links directly to Tableau?

Yes, this tile has been added to the [my.rutgers.edu](https://my.rutgers.edu) home page.

#### 3. What browser do you recommend for Tableau?

Tableau supports all browsers, work best with Google Chrome and Firefox.

### Tableau License

#### 1. Do I need a Tableau desktop license to access the Finance reporting environment?

No, you do not need a Tableau Desktop license to access the Tableau Finance reporting environment. You can access the Tableau finance reports via the Tableau Enterprise Server (<https://bireporting.rutgers.edu/>), which is a web-based interface that enables users to interact with published Tableau Workbooks (Reports) and Views.

#### 2. If I have a Tableau desktop license already, can I use it to link to the online version?

Yes, you can access the Tableau Server via Tableau Desktop application. If you currently have Tableau desktop installed on your device, then you will be able to access all authorized data sources that are published on the Tableau Enterprise server by entering <https://bireporting.rutgers.edu/> in the “Tableau Server Sign-in” window from the “Connect to Data Source” menu item.

Please refer to the [Tableau Enterprise Server Access FAQs](#) section to request access to Tableau Finance reports.

### 3. Do I need to purchase Tableau Desktop or renew the license each time it expires?

Now that the Tableau Server is available, we can provide access to users to create reports online without the need for Tableau Desktop license purchase/renewal.

Tableau Desktop offers some features and functionality that are not available in the current Tableau Enterprise Server as an online Web Author. Please refer to “**Tableau Desktop vs. Tableau Server – Which is Right for You?**” to determine which license is right for you.

## Tableau Enterprise Server Access

### 1. How do we request Tableau access for ourselves and/or others in our department?

You will need to submit a Tableau Finance reporting access form to get access to the Tableau Finance reporting site. The Tableau access forms can be found at the following link: [UCO FINANCIAL REPORTS AND ANALYTICS ACCESS FORMS \(TABLEAU\)](#).

## Training

### 1. Is basic training in Tableau available?

Yes, we have published basic training materials for **Finance Managed Reports (MR)** on [Canvas](#). Materials published to this site include job aids, recorded webinar video, webinar presentation, and useful Tableau links.

### 2. What other training options are available?

We are developing more comprehensive Tableau training. The Finance DART will contact all Finance Tableau users as training programs become available.

## Tableau Discoverer Finance Replacement Report

### 1. Why are you replacing the Discoverer Finance reports with Tableau?

Oracle no longer supports the Discoverer report developer/viewer tool. This lack of support is a risk and could potentially impact the stability and reliability of the reports developed using this tool. The underlying data is accurate and maintained in the Enterprise Data Warehouse platform. To mitigate this risk, we have transitioned the Discoverer finance reports to the Tableau Enterprise Server environment, which points to the data in the Financial Data Warehouse (FDW).

All active Discoverer Finance report users have been set up with a new user account on the Tableau Enterprise Server to provide you with access to Payroll (current and RU legacy), RU legacy General Ledger, and RU legacy Procure-to-Pay reports. You will access to these Tableau Finance reports via your web browser, which means you are not required to purchase a Tableau Desktop license.

**2. Which Discoverer Finance reports will be replaced in Tableau?**

Below is a list of the Discoverer Finance reports that are available in Tableau:

Discoverer Finance Report Replacement List		
Report Group	Workbook Name	Current / RU Legacy Data
Payroll	FMS Payroll Distribution Report (PD) - Financial Management	Current
	FMS Employee Status Report	Current
	FMS Appointment Level Charging Instructions	Current
	FMS Department Default ECI	Current
	FD Payroll Distribution Report (PD)	RU Legacy
	FD Employee Status Report	RU Legacy
G/L	FD Fund Source Detail (SD)	RU Legacy
	FD Fund Source Summary by Natural Account (SS,BA)	RU Legacy
	FD Fund Source Report by Period (MAR)	RU Legacy
	FD All Funds Budget- NEW	RU Legacy
	FD Project To Date Natural Account Summary	RU Legacy
	FD Document Number Lookup	RU Legacy
	FD Chart of Accounts ( AI )	RU Legacy
	FD COA Segment Listing	RU Legacy
P2P	P2P Tracking Invoices and Payments (TP)	RU Legacy
	P2P Purchase Order Overview	RU Legacy
	P2P IPO Release Payment Detail	RU Legacy
	P2P Tracking Invoices and Payments by Supplier number	RU Legacy
	P2P Check Request Lookup by PO	RU Legacy
	P2P Check Request Lookup by Supplier	RU Legacy

Table 1

**3. Will we have access to Payroll, General Ledger, and Procure-to-Pay data prior to 2012 in Tableau?**

There is an issue accessing all legacy transactions in the Tableau legacy reports (RU Payroll legacy, RU GL legacy, and RU P2P legacy). As a temporary solution, the Tableau legacy reports can access a limited amount of Payroll, GL, and P2P legacy transactions (please refer to the list of [Discoverer Finance](#) reports above). We are working with OIT on a solution to provide all legacy data in Tableau.

In lieu of this issue, **we will not shut down the Discoverer Finance reports** until the Tableau legacy transaction solution is in place. Discoverer Finance reports will continue to be available until we find a solution to access all of the RU legacy transactions via Tableau.

Once this solution is in place, we will announce plans to retire the Discoverer Finance reports.

**4. When will Discoverer Finance Reports be retired?**

The Discoverer Finance reports will be retired when the Tableau legacy reports provide access to all legacy data in the Financial Data Warehouse. Once the issue is resolved, we will announce the sunset timing.

**5. Will there only be pre-made/"canned" reports, or will there be the capacity to develop our own reports?**

Our initial goal was to provide access only to the pre-made ("canned") [Discoverer Finance](#) reports, which are located in the **Tableau Finance Managed Reporting (MR)** environment. Users who can create Tableau reports have access to the **Tableau Finance Self-Service (SSA)** environment.

If you want to create, publish, and share Tableau reports, please contact the Finance DART at [reporting@finance.rutgers.edu](mailto:reporting@finance.rutgers.edu) to discuss options.

**6. Will there be reports on enrollment and tuition on these new canned reports in Tableau?**

Yes, enrollment and tuition reporting will be coming in future phases.

**7. After all the reports are live in Tableau, what will remain in Discoverer?**

Once all the [Discoverer Finance](#) reports that are listed in *Table 1* above are completed in Tableau, we will retire all Discoverer Finance Reports accordingly. All other Discoverer non-Finance reports (i.e. HR, Student, etc.) will not be affected by this transition.

**8. Are there certain Discoverer Finance reports that are not available in Tableau?**

We replaced the top 20 core Discoverer finance reports (please refer to the [Discoverer Finance](#) report list in *Table 1* above) for our initial rollout of Tableau. We did not consider recreating Discoverer Finance reports that were variations or customizations of the core Discoverer Finance reports that were developed initially by OIT based on requirements.

If additional Discoverer Finance reports have not been recreated in Tableau, please contact the Finance DART at [reporting@finance.rutgers.edu](mailto:reporting@finance.rutgers.edu) to discuss options.

**9. How do you define “Finance reports”? Do they include payroll reports?**

Discoverer Finance reports refers to any Discoverer report that used data from the Finance Data Warehouse (FDW) database, which includes all Payroll Distribution (Current and RU Legacy Payroll) reporting. Refer to *Table 1* above.

**10. Will Tableau be used for the financial management system Payroll Distribution Report?**

Yes, the [Discoverer Finance](#) report list in *Table 1* above shows the list of Discoverer Finance that are now available in Tableau.

**11. Will there be any enhanced features in Tableau, such as customizing and bringing in further data, that was not previously available in Discoverer?**

Yes, Tableau offers some features that are not available in Discoverer, including:

- Search capabilities in report prompts
- Save custom Views with parameters
- Multiple Views within a Workbook can be opened simultaneously
- Each View within a Workbook runs independently of all other Views within the same Workbook (i.e. *View 1* can be run using different parameters than *View 2* within the same Workbook)
- Switching between multiple Views (worksheets) within an open Workbook

Bringing in additional data (i.e. adding external data into existing report) is not possible for the reports available in the **Finance Managed Reporting (MR)** environment.

If you wish to modify/customize these reports (i.e. add or remove columns, totals/subtotals, filters, etc.), please contact the Finance DART at [reporting@finance.rutgers.edu](mailto:reporting@finance.rutgers.edu) to discuss options.

**12. Will the .csv data download also include the filter information at the top of the report as it exists in both Discoverer and Tableau?**

No, unfortunately, the current version of Tableau does not support this feature.

**13. Will the new Tableau reports have the same fields and selection as Discoverer?**

Yes, these Tableau reports closely mimic the Discoverer reports that are being replaced. These Tableau reports will have the same filters and the same columns as the original Discoverer reports.

**14. Is there option to run payroll by period instead of fiscal year?**

The Tableau reports were created based on the original Discoverer Finance report specifications. Since this was not an option in the original Discoverer report, it is not available in the Tableau version.

**15. Are there any plans in the future to have Tableau as the one software/platform to reconcile all accounts and projects? Personnel and non-personnel transactions?**

Yes, we will publish additional Tableau Finance reconciliation reporting in future phases.

**16. What about reports for projects?**

You can continue to use current reports in Oracle until project details are brought into Tableau in future phases.

**17. With shutting down financial reports in Discoverer, does this mean we should retrieve historical data needed for grants/sponsored projects? Can you clarify?**

Yes, you can access historical grants/sponsored projects transactions via the Tableau RU legacy Payroll and RU legacy GL reports (refer to the list of [Discoverer Finance](#) reports in *Table 1* above).

**18. Will we still use the financial management system to run General Ledger and Procurement reports after October 2016?**

Yes, you still will have access to all Oracle reports to report on all ledger and sub-ledger data available in Oracle (Oct-16 to current).

**19. Will we have access to current Payroll data here?**

Yes, there are four financial management system Payroll reports available that will enable you to report on current Payroll data (refer to the [Discoverer Finance](#) report list in *Table 1* above).

**20. The [webinar](#) Finance DART 12.6.2018 only covered RIAS data. Will there be a webinar for Oracle data?**

The webinar used the **FD Fund Source Detail (SD)** G/L legacy report to demonstrate the capabilities and functionality in Tableau Finance reports. Please see the [Discoverer Finance](#) report list above for the list of *legacy* and *current* finance reports available in Tableau.

Training materials for Oracle Cloud Reports (Oracle Data) can be found at <https://uco.rutgers.edu/training-and-resources>. We do not currently have plans to include additional webinars for Oracle Data training.

**21. Does that mean all conversion salaries are going to be there in detail by person?**

If you are referring to the Payroll Distribution report and if the information is included currently in Discoverer report, yes, this same data is available as part of the Tableau reports.

**22. Will we have the entire history in these reports so we will not have to print two sets for fiscal year 2017 (FY17)?**

You will need to continue to have two sets for FY17, since this first three months of FY17 are in the respective legacy systems and use different COA chart structures that make it difficult to have the data in one report.