Requesting Access to

**Financial Reports and Analytics**

**(Tableau Self-Service Analytics Platform)**

The Tableau Self-Service Analytics Platform can be used to develop ad-hoc reports and analytics of Data Repositories such as Payroll, General Ledger (GL), Tuition Distribution, Sponsored Project Reconciliation, etc. The developed reports and analyses can also be published/shared with other users within each of the campuses/units.

**Processing time varies and can take up to 10 business days.**

1. Applicant must be an active University employee and have a NetID.
* Access can be assigned to regularly appointed employees (Employee Classes 1, 6, 7, or 9).
* Student (Class 5) and Co-Adjutant (Class 8) employees will not be granted access.
* Short Term (Class 3) and Casual (Class 4) employees will not be granted access unless the unit documents a compelling need that would justify the frequent systems maintenance required for transient classes of employees.
* A justification letter must accompany the access request.

# It is required that the applicant read and accept the online Agreement for Accessing University Information located at <https://identityservices.rutgers.edu/agreement/>. A NetID is required to access and accept this agreement.

**Contingent Workers and University Guests**

* If you DO NOT get paid directly by “Rutgers University”, you are a Contingent Worker or University Guest.
* Along with the Access Request form, you must submit the *Contingent Worker HCM System Input Data Form*.
Email cloudaccess@finance.rutgers.edu to request this form.

**Requesting Access:**

# ►► Acceptance of the Agreement for Accessing University Information will be VERIFIED. ◄◄

* **Read the instructions on the form.**
* **Applicant Information:** All fields are required. Information will be VERIFIED.
* **Financial Reports and Analytics:** Please be aware that all access will be GLOBAL.
* **Review and Approval (Required Signatures)**
* **Applicant** must sign the form.
* If required by the Department (Libraries, SAS, SASN, SEBS, SPH), requests for access must be reviewed and approved (via signature) by the Department’s Business Manager.
* The review and approval (via signature) of the **Department’s Tableau Content Manager** is required and will be VERIFIED. Go to <https://uco.rutgers.edu/list-tableau-content-managers> for the names.
* The review and approval (via signature) of a **Dean, Director, or Department Chair**
(Class 1, Grade 8 or above; or Class 1, Grade 33S or above) is required and will be VERIFIED.
* Authority to access specific administrative data must also come from the appropriate Business Process owners(s) responsible for the data.
* **Requests for access will not be processed without the Tableau Content Manager and Dean, Director, or Department Chair signatures.**

Completed forms should be scanned as PDFs and emailed to: cloudaccess@finance.rutgers.edu.

Do not include this Instruction sheet.

Questions about Access? Email cloudaccess@finance.rutgers.edu

Form is

**Financial Reports and Analytics**

**(Tableau Self-Service Analytics Platform)**

1. Use MicroSoft Word to fill out this form. Tab between fields.
2. Users must accept the Agreement for Accessing University Information at <https://identityservices.rutgers.edu/agreement/>.
3. Please use full, formal names.
4. After obtaining required signature(s), email PDF of form to the **Tableau Content Manager** for your area.
5. Once signed, the Tableau Content Manager will forward the form to cloudaccess@finance.rutgers.edu.
6. Email subject line: [last name of applicant] – Tableau Self-Service.

Applicant Information (Please Print) – ALL Fields are **Required**. Effective Date:

Name:       RU Employee ID (8-digits):       ■

Title:       UDO #: (Unit)       (Division)       (Org)       □

Unit Name:       Employee Class:

Division Name:       Phone:

Org Name:       RU Email Address:       □

Campus Address:       Net ID (in **CAPS**):       □

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CAMPUS/UNIT

 [ ]  Camden [ ]  New Brunswick [ ]  Newark [ ]  RBHS

CENTRAL and/or OTHER UNITS

 [ ]  Academic Affairs [ ]  Libraries [ ]  Rutgers Global (SPUR, NB)

 [ ]  Athletics [ ]  Office of Information Technology [ ]  Treasury

 [ ]  Development and Alumni Relations [ ]  President’s Office [ ]  University Controller’s Office

 [ ]  External Affairs and UCM [ ]  Procurement [ ]  University Human Resources

 [ ]  Institutional Planning and Operations [ ]  Research (Pre-Award)

 [ ]  Other

[ ]  DELETE ALL ACCESS

(Required) **PRINT NAME Net ID** (in CAPS) **Signature** Date

Name of Applicant (Required) Applicant

(If Applicable) **PRINT NAME Net ID** (in CAPS) **Signature** Date

Name of Business Manager (Required) Business Manager

(Required) **PRINT NAME Net ID** (in CAPS) **Signature** Date

Name of Tableau Content Manager (Required) Tableau Content Manager

**Content Managers’ Names**: <https://uco.rutgers.edu/list-tableau-content-managers>

(Required) **PRINT NAME Net ID** (in CAPS) **Signature** Date

Name of Dean, Director, or Dept. Chair (Required) Applicant’s Dean, Director, or Dept. Chair

BPO Approval: Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Processed By \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_