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](mailto: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](mailto:cloudaccess@finance.rutgers.edu).

Do not include this Instruction sheet.

Questions about Access? Email [cloudaccess@finance.rutgers.edu](mailto: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](mailto: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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_