RUTGERS
Student Accounting, Billing, and Cashier Services

Requesting Access to

<u>Financial Reports</u>
<u>(Tableau Managed Reports)</u>

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 <u>not</u> 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.
2. 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 <u>directly</u> 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. ◄◄

►► Completion of both FERPA & GLBA training will be VERIFIED. ◄◄

- **Read the instructions on the form.**

- **Applicant Information:** <u>All fields are required</u>. Information will be VERIFIED.

- **Financial Reports and Analytics:** Please be aware that all access will be <u>GLOBAL</u>.

- **Review and Approval (Required Signatures)**
  o <u>Applicant</u> must sign the form.

  o 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.

  o 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 <u>required</u> and will be VERIFIED.

  o Authority to access specific administrative data must also come from the appropriate Business Process owners(s) responsible for the data.

  o **Requests for access <u>will not be processed</u> without the Dean, Director, or Department Chair signature.**

Completed forms should be scanned as PDFs and emailed to: tableauaccess@sa.rutgers.edu.
Do not include this Instruction sheet.

Questions about Access? Email tableauaccess@sa.rutgers.edu

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and Cashier Services

Financial Reports
(Tableau Managed Reports)

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: tableauaccess@sa.rutgers.edu for processing.
5. Email subject line: [last name of applicant] - Tableau.
6. Complete FERPA and GLBA training if not already completed this Fiscal Year.

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

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

Title: _____   UDO #: (Unit) _____ (Division) _____ (Org) _____ ☐

Unit Name: _____   Employee Class: _____

Division Name: _____   Phone: _____

Org Name: _____   Email Address: _____ ☐

Campus Address: _____   Net ID (in **CAPS**): _____ ☐

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☐   **SAR Transaction Reports**

    You will be enrolled in GLBA and FERPA training if you have not completed these trainings this Fiscal Year.

        ☐   DELETE All Tableau 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 Dean, Director, or Dept. Chair   (Required)   Applicant's Dean, Director, or Dept. Chair

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BPO Approval: _____ Date _____ Processed By _____ Date_____