

Financial Reports **(Tableau Managed Reports)**

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

1. Applicants 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.
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 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. ◀◀

▶▶ Completion of both **FERPA & GLBA** training 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 (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 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 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

Tableau Student Accounting Access Request Form

1. Users must accept the Agreement for Accessing University Information at <https://identityservices.rutgers.edu/agreement/>.
2. Please use full, formal names and complete Steps 1, 1a, and 2.
3. After completing form and obtaining required signature(s), email PDF of form to: tableauaccess@sa.rutgers.edu for processing with a subject line: [last name of applicant] – Tableau SAR Access.
4. 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): _____ <input checked="" type="checkbox"/>
Title: _____	UDO #: (Unit) _____ (Division) _____ (Org) _____ <input type="checkbox"/>
Unit Name: _____	Employee Class: _____
Division Name: _____	Phone: _____
Org Name: _____	Email Address: _____ <input type="checkbox"/>
Campus Address: _____	Net ID (in CAPS): _____ <input type="checkbox"/>

Step 1: Requirements

Please select the data needed, based on your job function. For example: do you require access to the SAR Dashboards or the access to the Student Accounting data to create reports.

- ☐ Dashboards – Student Accounting Dashboards only
- ☐ Student Accounting data (enables you to download and create reports on student identifiable information, e.g., student id, student name, balance by course) – Please complete step 1a Verification.

You are requesting access to sensitive data protected by FERPA and GLBA regulations. As such, you **will be** enrolled and must complete GLBA and FERPA training, if you have not already completed it during this Fiscal Year.

Step 1a: Verification

If you choose Student Accounting data, please provide a justification for why you need access to Student PII. If you do not provide verification, access will NOT be granted.

Step 2: Campus Units

Please select your Campus

Based upon your selection you will be able to have access to folders specific to your Campus Unit, e.g., SAC Camden, SAC Newark, SAC New Brunswick, SAC RBHS, where reports created by other users are saved and shared.

Campus

- | | |
|---------------------------------|--|
| <input type="checkbox"/> Camden | <input type="checkbox"/> New Brunswick |
| <input type="checkbox"/> Newark | <input type="checkbox"/> RBHS |

☐ [DELETE All Tableau Access](#)

(Required) PRINT NAME Name of Applicant	Net ID (in CAPS) (Required)	Signature Applicant	Date _____
(If Applicable) PRINT NAME Name of Business Manager	Net ID (in CAPS) (Required)	Signature Business Manager	Date _____
(Required) PRINT NAME Name of Dean, Director, or Dept. Chair	Net ID (in CAPS) (Required)	Signature Applicant's Dean, Director, or Dept. Chair	Date _____