Requesting Access to

**Tableau / OAC - Financial Reports and Analytics**

Tableau Managed Reports are predefined reports available within the Tableau environment. These reports have been developed and managed by the Finance Data and Analytics team and are in the Managed Reporting folders in Tableau.

Tableau Self-Service Analytics (SSA) allows the Tableau user the ability to create or change Tableau reports

using the datasets available to you. The developed reports and analyses

can 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.
* If you request SSA access, the review and approval (via signature) of the **Department’s Tableau Content Manager** is required and will be VERIFIED. Go to [Tableau Content Managers](https://finance.rutgers.edu/node/293) 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.
* **Requests for SSA access will not be processed without the** [**Tableau Content Manager's**](https://finance.rutgers.edu/node/293) **signature.**
* **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: cloudaccess@finance.rutgers.edu.

Do not include this Instruction sheet.

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

Form is

**TABLEAU/OAC - Financial Reports and Analytics**

1. Users must accept the Agreement for Accessing University Information at <https://identityservices.rutgers.edu/agreement/>.
2. Please use full, formal names.
3. If you are requesting SSA access, after obtaining the required signature(s), email PDF of form to the [**Tableau Content Manager**](https://finance.rutgers.edu/node/293) for your area.
4. Once signed, the Tableau Content Manager will forward the form to cloudaccess@finance.rutgers.edu.
5. 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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**Step 1: Data Requirements:** Please select the data the user needs access to, based upon job function.

 [ ]  General ledger (GL) data [ ]  Payroll/Employee data (Payroll data includes **OAC – Oracle Analytics Cloud** – the Sponsored Reconciliation Report which displays budget, expenditure, commitment, and payroll detail by sponsored Project.)

**Step 2: Type of Access and System:** Please select the type of access required.

[ ]  **Tableau Managed Reports (MR)**

 Tableau Managed Reports are predefined reports available within the Tableau environment. These reports have been developed and are managed by the Finance Data and Analytics Team and are in the Managed Reporting (MR) folder within Tableau.

[ ]  **Tableau Self-Service Analytics (SSA)**

* Tableau Self-Service Analytics (SSA) allows the Tableau user the ability to create or change Tableau reports using the datasets available to the user.
* To obtain SSA access, the applicant MUST obtain Tableau Content Manager approval via signature below.
* Please select the Campus and/or Central Unit data access. The reports created will be saved and accessed via folders related to those areas.

 **Campus:** [ ]  Camden [ ]  Newark [ ]  New Brunswick [ ]  RBHS

 **Central Units:** [ ]  Athletics [ ]  External Affairs and UCM [ ]  IP&O [ ]  Libraries [ ]  OIT [ ]  Procurement [ ]  Research [ ]  Treasury [ ]  UCO [ ]  UHR

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[ ]  **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 for SSA Access) **PRINT NAME Net ID** (in CAPS) **Signature** Date

\* Name of  [**Tableau Content Manager**](https://finance.rutgers.edu/node/293) (Required) Tableau Content 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