

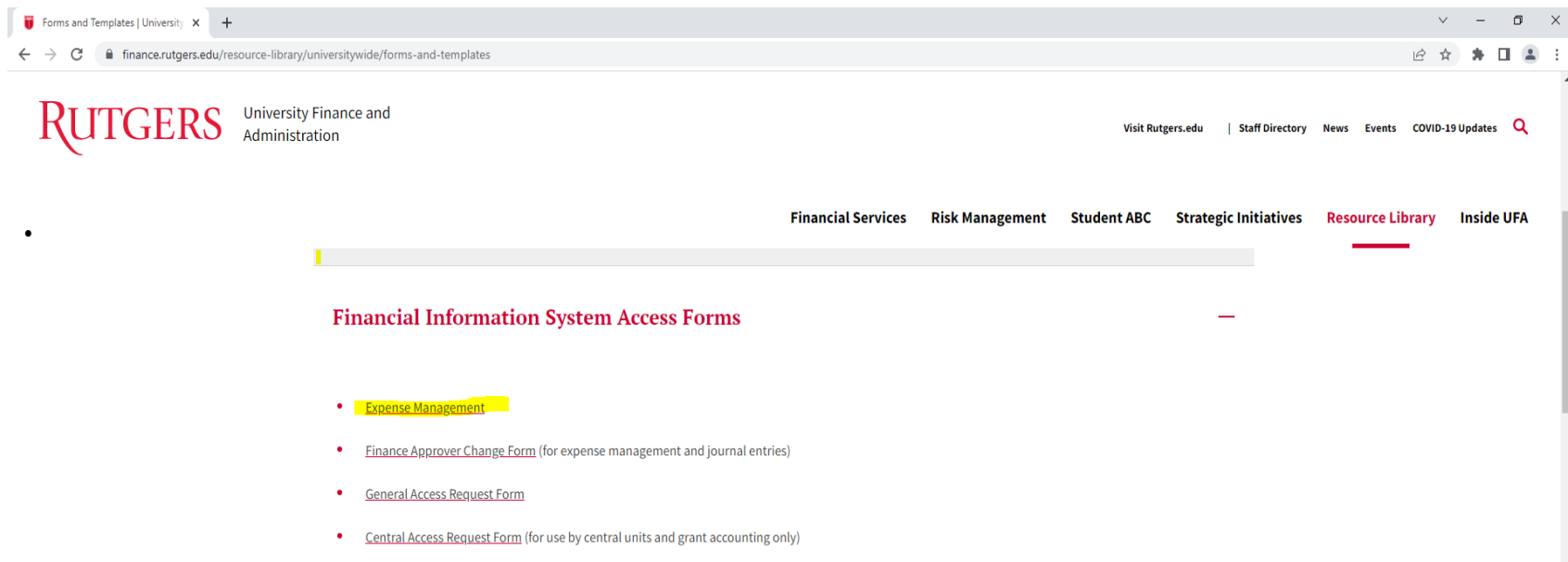
DocuSign - Important Information

- The **Tableau/OAC Access Form** is now a DocuSign PowerForm. This makes signing and routing the form much easier.
- If you don't have a DocuSign account, please setup an account at <https://it.rutgers.edu/docusign/getting-started-with-docusign/>
- **Always use your Rutgers email address.** Check “Junk” and “Clutter” in your Rutgers email address for DocuSign notifications if you don't see them in your inbox.
- The person who initiates or prepares the form can be an admin, department head, business manager, or the applicant.
- Enter accurate information for the routing of the form. Please check with your supervisor or unit's business manager for the names and email addresses for the individuals who will be signing the form. **Note:** If the person who prepares the form is the same as the applicant, they will need to enter their name and email address twice in the routing information.
- If your department does not require a business manager to sign the form, leave that routing information blank.
- Do not exceed the character limits of each field or your content could be missing important information.
- DocuSign forms can be saved and edited later by clicking “OTHER ACTIONS” or "FINISH LATER" in the top right corner of the form.
- The “FINISH” button will NOT work on any DocuSign form until all of the required information has been entered.
- You must click on the “FINISH” button before the form will route to the next individual in the routing list. **You cannot go back and edit the form once the “FINISH” button is clicked.**
- When all signatures have been obtained, A copy of the fully-executed document is automatically emailed to the individual who initiated the form, and all individuals who have signed the document.
- **Once the form is completed with all required signatures, it is important that the form preparer save the form with the applicant's name and the form name (e.g., Applicant Name - Tableau/OAC Access Form) before emailing to Cloud Access:cloudaccess@finance.rutgers.edu for processing.**
- If you have any questions about the Tableau/OAC Access Form, please contact Cloud Access: cloudaccess@finance.rutgers.edu

DocuSign FMS PowerForms – Instructions and Important Information

1. The Form Preparer initiates the PowerForm from the Tableau/OAC Access Form link on the UFA website as shown in the screenshot below.

- The form is located at <https://finance.rutgers.edu/resource-library/universitywide/forms-and-templates>
- The form preparer (can be an admin, department head, business manager or applicant) initiates the PowerForm from the Forms and templates page under Resource Library, Financial Information System Access Form, on the UFA website.
- The form preparer enters the routing information into the PowerForm signer information box (see example on next page). If the form preparer is the same as the applicant, they would need to enter their name and email address twice.
- Before starting the form, the preparer must know the names and email addresses of all required persons who are signing. For assistance, see your Supervisor or Unit's Business Manager.
- Each form has two pages. The first page are the instructions on completing the fields on the form. The second page is the actual form to complete.
- Once completed, all parties will receive a final signed copy of the Tableau/OAC Access Form.
- **Once the form is completed with all required signatures, it is important that the form preparer save the completed form with the applicant's name and the form name (e.g., Applicant Name - Tableau/OAC Access Form) before emailing to Cloud Access:cloudaccess@finance.rutgers.edu for processing.**



2. To begin, the Form Preparer enters routing information into the PowerForm Signer Information Box

- The form preparer must know the names and email addresses of all required persons who are signing before routing the form. For assistance, see your Supervisor or Unit's Business Manager.
- The form preparer who will be entering all the required information on the form needs to enter their own name and e-mail address in the fields labeled "Your Name" and "Your Email" as shown in the example on the right.
 - **If the form preparer and the applicant are the same, their name and email address needs to be entered twice.**
- The form preparer will also enter the names and email addresses of all required signatures including the Applicant, Business Manager (if required or leave blank), Content Manager, and the Dean, Director, or Department Chair (**Class 1, Grade 8 or above; or Class 1, Grade 33S or above**) is required and will be verified.
- **If the applicant is requiring SSA access, the name and email of the Campus or Central Unit Content Manager needs to be entered.**

This information must be correct in order for the form to route to everyone.

Once all the names and emails are entered, Click on **Begin Signing** to start the form



PowerForm Signer Information

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document. Please enter your name and email to begin the signing process.

Form Preparer

Your Name: *
Full Name

Your Email: *
Email Address

Please provide information for any other signers needed for this document.

Applicant

Name: *
Full Name

Email: *
Email Address

Business Manager (Optional)

Name:
Full Name

Email:
Email Address

Campus Tableau Content Manager (if requesting SSA Access)

Name:
Full Name

Email:
Email Address

Central Unit Tableau Content Manager (if requesting SSA Access)

Name:
Full Name

Email:
Email Address

Dean, Director or Dept. Chair

Name: *
Full Name

Email: *
Email Address

BEGIN SIGNING



3. Starting the form

- Please read the Electronic Record and Signature Disclosure document before agreeing to use electronic records and signatures.
- Click the box to agree, then click **CONTINUE**.

Please Review & Act on These Documents



Powered by **DocuSign**



Please read the [Electronic Records and Signature Disclosure](#).

I agree to use electronic records and signatures.

CONTINUE

OTHER ACTIONS ▾

- After clicking **CONTINUE**, read the instructions preceding the form, then click on **START** to begin filling in the required fields.

Please review the documents below.

FINISH **OTHER ACTIONS ▾**

START

Requesting Access to

Tableau / OAC - Financial Reports and Analytics

This is now a DocuSign Powerform

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 the user. 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.
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. ◀◀

4. Filling in the Fields

- When the form preparer has the form open:
 - Complete all required fields outlined in **Red** for the Applicant
- **Step 1 - Data Requirements** - check GL data and/or Payroll data - if requested or leave blank
- **Step 2 - Type of Access** - if requested or leave blank
 - Select either Managed Reports (MR) or Self-Service Analytics (SSA)
 - **If Selecting SSA, select one of the Campuses or one of the Central Units boxes**
- **Check other Option (Delete All Access)** if requested or leave blank
- Click on **FILL IN** to complete the required fields. You can tab to each field until all information is entered.
- When all the required fields are complete, the **FINISH** tab will appear at the top or at the bottom of the window.
- You will not be able to go back and edit or enter information into the form once you click on **FINISH**.
 - **If you can't complete the form now, see how to finish the form later in steps 12 and 13 at the end of this document.**

Required fields left.

RUTGERS

TABLEAU/OAC - Financial Reports and Analytics

1. Please refer to the full instruction sheet before completing the form.
2. Users must accept the Agreement for Accessing University Information at <https://identityservices.rutgers.edu/agreement/>.
3. All required fields must be completed by the Form Preparer.
4. The form preparer's name and email address will automatically be pre-populated, as will the name of the Applicant, Business Manager (if applicable), Tableau Content Manager, and Dean, Director, or Department Chair.
5. **If you are requesting SSA access, the signature of the Tableau Content Manager for your Campus/Central Unit is required.**
6. DocuSign will automatically email all persons who are required to sign and date the form.
7. Once the form is completed with all required signatures, all signers will receive a copy of the form.
8. **The Preparer should save the form with the Applicant name and name of the form (e.g., Applicant Name- Tableau/OAC Access Request) and send to Cloud Access: cloudaccess@finance.rutgers.edu**

Required: Form Preparer Name: _____ Email: _____

FILL IN

Applicant Information – ALL Fields are Required.

Name: _____ Effective Date: _____
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): _____

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.)

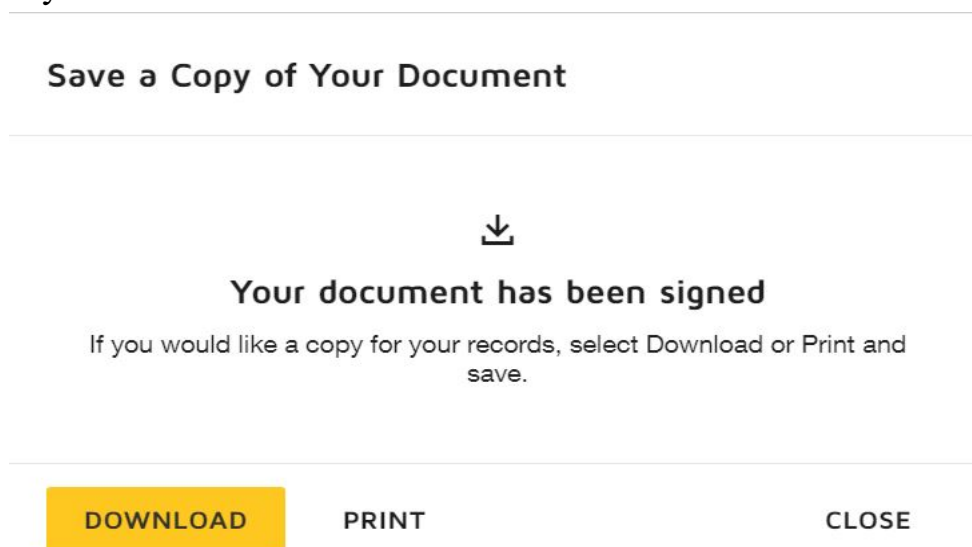
Step 2: Type of Access and System: Please select the type of access required.

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.

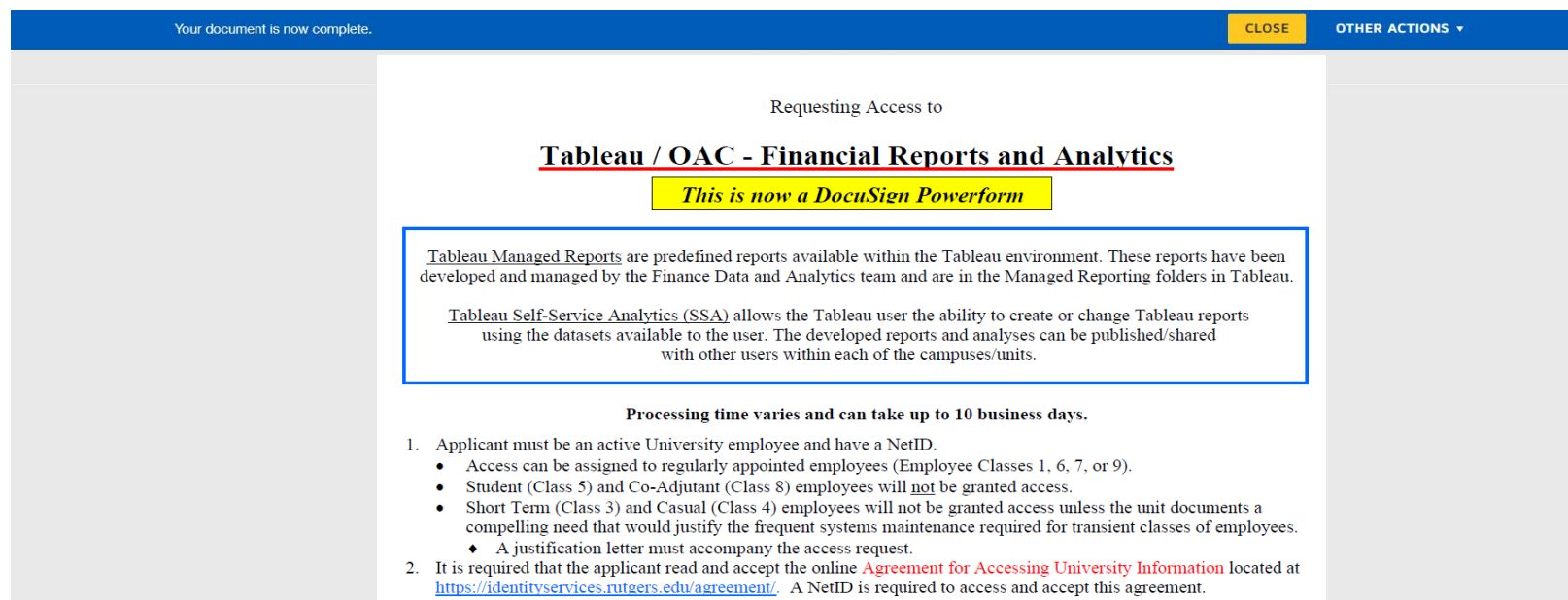
Tableau Self-Service Analytics (SSA)
• Tableau Self-Service Analytics (SSA) allows the Tableau user the ability to create or change Tableau reports using the datasets available to the user.
• To obtain SSA access, the applicant **MUST** obtain Tableau Content Manager approval via signature below.

5. When the form preparer has completed filling in the required fields, click **FINISH**.

- A pop-up screen (shown below) will appear.
- You have the option to download, print, save a copy of the form, or close before it routes to the next signer.
- It is suggested that you save the form.



- After closing the pop-up window, another screen will appear showing the document is now complete as shown in top left in screenshot below. You can then close this window. The document will be routed to the first signer.



6. Review Document and Sign

- When the form has been completed, the first signer will receive an email to **REVIEW DOCUMENT** to access the form and complete the signing process as described in Steps 7 and 8.

DocuSign



Sample Sender sent you a document to review and sign.

REVIEW DOCUMENT

7. Beginning the Signing Process

- When you click on **REVIEW DOCUMENT**, the screenshot below will appear.
- Please read the Electronic Record and Signature Disclosure document before agreeing to use electronic records and signatures.
- Click the box to agree, then click **CONTINUE**.

Please Review & Act on These Documents



Powered by **DocuSign**



Please read the [Electronic Records and Signature Disclosure](#).

I agree to use electronic records and signatures.

CONTINUE

OTHER ACTIONS ▾

8. The Signing Process continued

- After clicking **CONTINUE** in step 7, the screenshot below will appear.
- After reading the instructions preceding the form, click on **START** to begin filling in the required fields.

Please review the documents below. **FINISH** **OTHER ACTIONS** ▾

START

Requesting Access to

Tableau / OAC - Financial Reports and Analytics

This is now a DocuSign Powerform

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 the user. 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.
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:

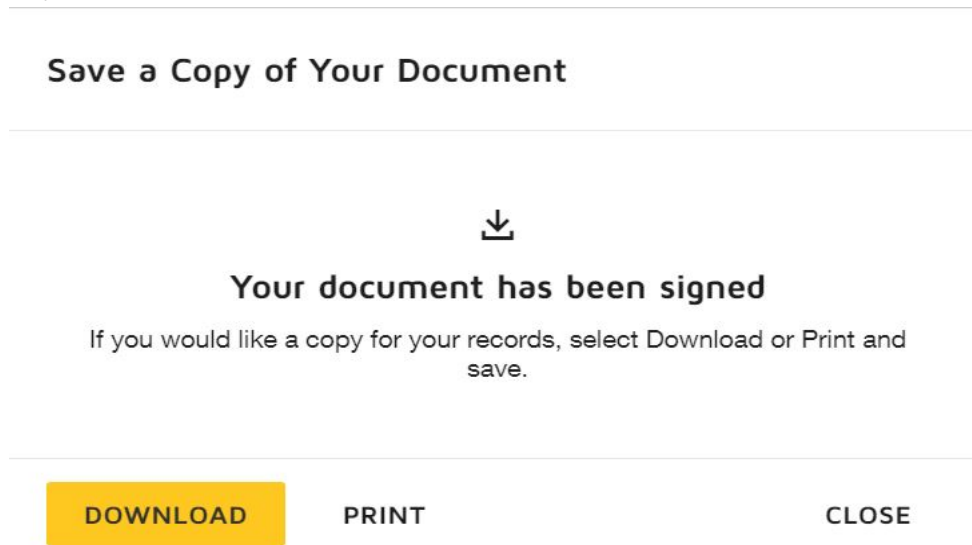
▶▶ Acceptance of the **Agreement for Accessing University Information** will be VERIFIED. ◀◀

9. Fill-In Required Fields

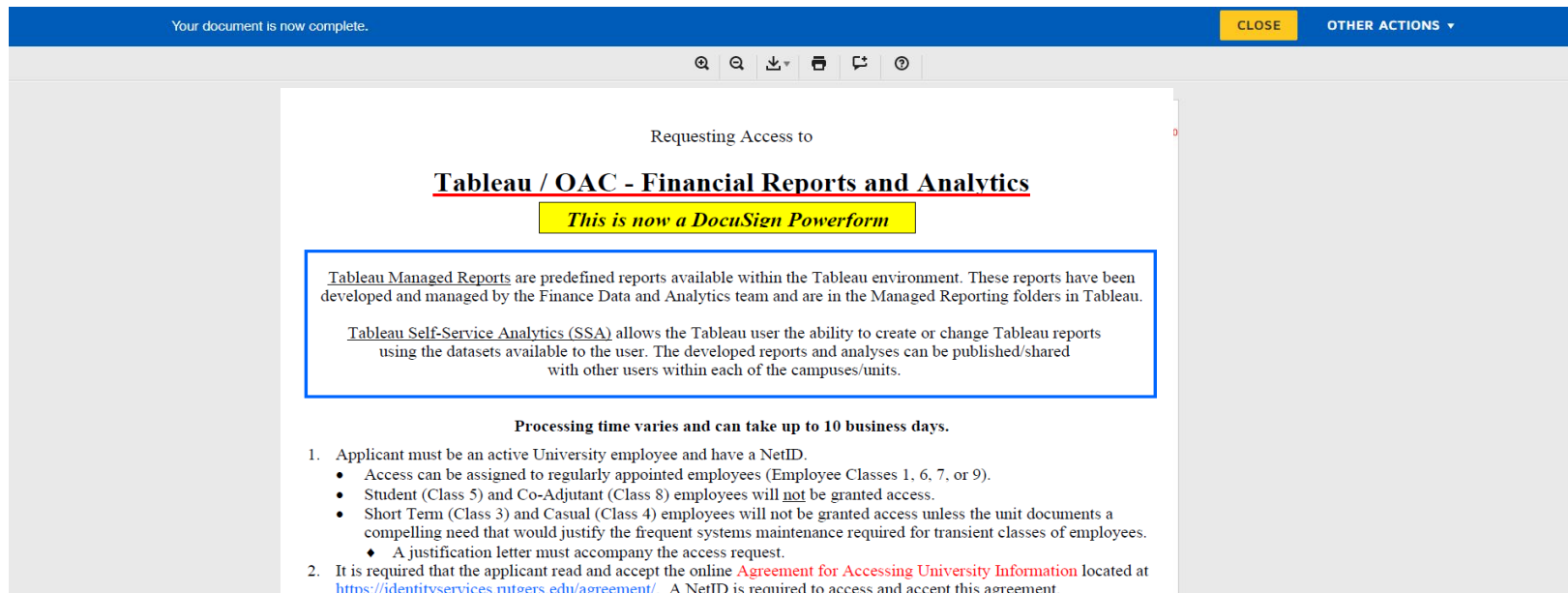
- Click on **FILL IN** to complete the required fields at the bottom of the form.
- The NETID and Signature fields are required. Your Name and Date are pre-populated.
- You can tab to each field until all information is entered.
- When all the required fields are complete, the **FINISH** tab will appear at the top or at the bottom of the window.
- You will not be able to go back and edit or enter information into the form once you click on **FINISH**.

10. When you are done signing, click FINISH .

- A pop-up screen (shown below) will appear.
- All parties have the option to download, print, save a copy of the form, or close before it routes to the next signer.
- It is suggested that you save the form.



- After closing the pop-up window, another screen will appear showing the document is now complete as shown in top left in screenshot below. You can then close this window. The document will be routed to the next signer.



11. Signed and Completed Document.

- When the last signer has completed the form, all parties will receive an email to review the completed document.
- A Completed document will also be an attachment.
- **Once the form is completed with all required signatures, it is important that the form preparer, save the completed form with the applicant's name and the form name (e.g., Applicant Name - Tableau/OAC Access Form) before emailing to Cloud Access: cloudaccess@finance.rutgers.edu for processing.**

DocuSign



Your document has been completed

[VIEW COMPLETED DOCUMENT](#)

12. How to **FINISH** the form **LATER**

- This is an option if you have the PowerForm open and cannot complete it at this time.
- To save information that has been entered so far, click on **OTHER ACTIONS** located at the top or bottom right of the screen.
- Click on **FINISH LATER**. This will close the form. You can only do this if you have not already clicked on **FINISH**.

Finish Later

Enter your email to receive a link to finish this document later. Your completed entries will be saved.

Email *

SAVE & CLOSE

CANCEL

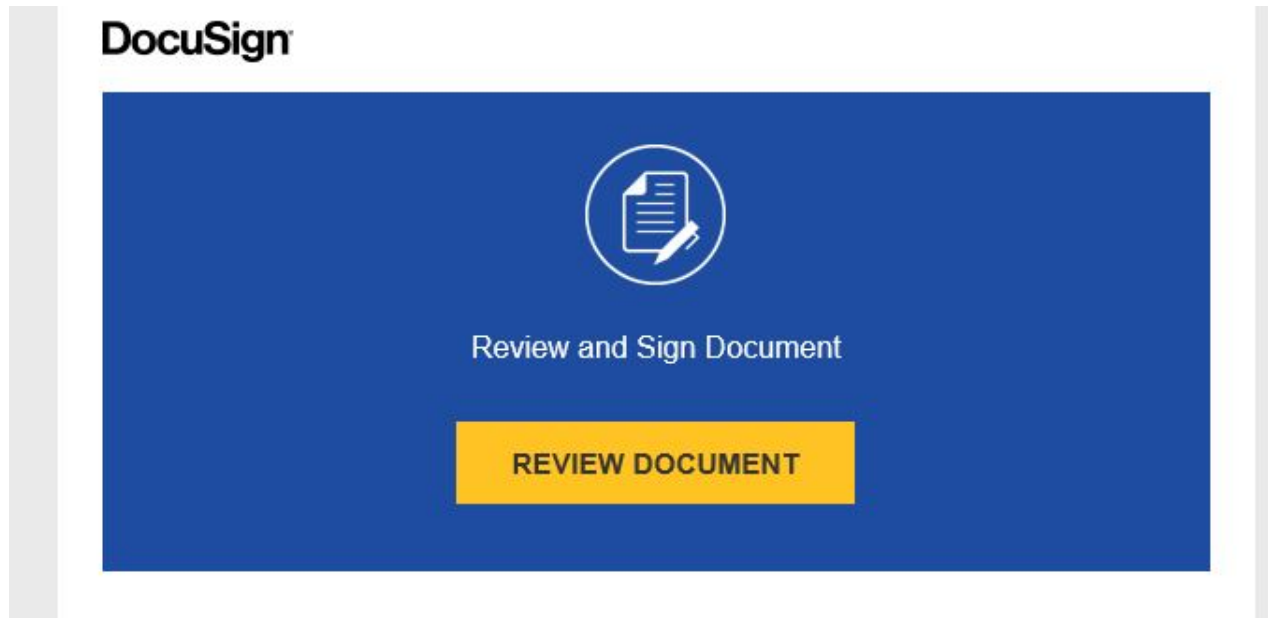
DocuSign

Don't Forget to Finish Later

You can come back using the original link to complete the document.

13. Resume Completing the document if it was saved.

- If you had saved the form to work on later, open the email you received to review and sign document.



- When you click on "Review Document" it will open up the first page to CONTINUE.

Please review the documents below.

[CONTINUE](#) [FINISH LATER](#) [OTHER ACTIONS](#) ▾

are automatically entered into Expense Management.

If an Active employee cannot access the Expense Management application, the employee's Profile needs to be updated.

Use this form to Update or Correct a newly hired, re-hired or current employee's profile.

Processing time: The Access Team is allowed up to 5 business days to complete processing. Normal processing time is within 24 hours of receipt. NO Notification of Completion will be sent.

Requesting Access:

- Read the instructions on the form.
- **Applicant Information:** All fields are required. Information will be VERIFIED.
- **Finance Approver Name:** Required: Enter the full, formal name of the Finance Approver.
- **Default Expense Account:** All segments are required. Enter a valid GL string. Cannot be a Project string.

Sample:

Unit	Division	Org	Location	FundType*	BusinessLine	Account	Activity	IntraUnit	Future
xxx	xxxx	xxxx	xxxx	100	xxxx	56990	0000	000	00000
				110					
				150					

* Only Fund Types 100, 110, or 150 are allowed.

- **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 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 access will not be processed without signatures.

14. When you are done signing or entering required fields, click **FINISH.**

- A pop-up screen (shown below) will appear.
- All parties have the option to download, print, save a copy of the form, or close before it routes to the next signer.
- It is suggested that you save the form.

Save a Copy of Your Document



Your document has been signed

If you would like a copy for your records, select Download or Print and save.

DOWNLOAD

PRINT

CLOSE

- All parties will receive an email to review the completed document.
- A Completed document will also be an attachment.

Once the form is completed with all required signatures, it is important that the form preparer, save the completed form with the applicant's name and the form name (e.g., Applicant Name - Tableau/OAC Access Form) before emailing to Cloud Access: cloudaccess@finance.rutgers.edu for processing.

DocuSign



Your document has been completed

VIEW COMPLETED DOCUMENT