RUTGERS UNIVERSITY	Tableau Quick Reference Guide

This quick reference guide provides pertinent information regarding the Tableau environment for Rutgers University users.

General Information:
- Rutgers University Finance Tableau data sources are updated daily **and reflect data from the prior day**.
- URL for Rutgers Tableau environment https://bireporting.rutgers.edu/
- Questions about finance reporting. Please contact the helpdesk: reporting@finance.rutgers.edu
- What is Tableau, created by OIT: https://sites.rutgers.edu/ebia/tableau-about/

Finance Report Catalog – A listing of Finance Reports that provides report links, descriptions, and subject area.

Tableau Quick Reference Guide created by Accelebrate.com

Tableau Training	**Terminology**
OIT Tableau Training - https://sites.rutgers.edu/ebia/training/ Rutgers Controllers Office Tableau Users Guides and Training - GL Tableau Training: TAB020: Developing Financial Reports in Tableau - Tableau GL SSA Training Documentation Guide: https://finance.rutgers.edu/sites/default/files/2021-10/Tableau%20GL%20SSA%20Training%20-%20Level%202%20Revised%2012.2.2019.pdf - FMS PD Training Guide: https://finance.rutgers.edu/sites/default/files/2021-06/FMSPayrollfinalv.pdf - Tableau Training Sample Workbooks developed by the Controller's Office https://bireporting.rutgers.edu/#/workbooks/529/views Training Published by Salesforce The course material listed below is available on Tableau's website. Each video is approximately 2-5 minutes in length, and you will have to register with Tableau to access the videos. - Connecting to Data Source - The Workspace Area - Area Charts: Includes charting, comments, discusses dimensions, and dynamic text. - Text Table: Creating KPIs, measures, and formatting. - Bar Chart: Creating Bar Charts - Building a Dashboard Tableau Desktop (Creator) Training - Get started with Tableau Desktop (Creator) – Training guide about how to get started with Tableau Creator. Written and published by Salesforce.	**What is Tableau:** Tableau is an industry-leading data visualization and analytic tool that helps users see and understand their data more efficiently and effectively. Tableau can be used to easily visualize and explore data, gain quick insights into the business, and ask deeper questions to deliver answers that are more meaningful. Tableau is a Salesforce product. **Tableau Server:** A Rutgers-wide reporting and analytic tool that can be accessed via the web by users across the university. Tableau Server allows users to interact with dashboards, reports, and datasets to analyze various aspects of the University. Tableau Server also enables users to create, publish, and share Tableau dashboards and reports. **Tableau Creator (Desktop):** User-based software that is installed on a users' computer and is a separate cost incurred by the user's organization. Tableau Creator enables users to create, publish, and share Tableau dashboards and reports by connecting to, or extracting data from, a large variety of data sources. Dashboards and Reports can be saved locally and shared with other Tableau Creator users and can also be published and shared on the Rutgers Finance Tableau server. **Tableau Content Manager** - A Tableau content manager is a representative from each of the University campus/units to help maintain the integrity of the Tableau reporting environment for their area. **Self Service Analytics (SSA) -** the platform that allows Tableau users the ability to create or change Tableau reports using the datasets available to you. **Managed Reports** - Tableau dashboards that are created, owned, and maintained by the FIS team.