

# Tableau Quick Reference Guide

## What is Tableau?

Tableau, a Salesforce product, 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.

- [View general Tableau training on the Salesforce website here](#)

**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.

- [Access the Rutgers Tableau reporting environment here](#)

**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 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.

**Finance Report Catalog:** A listing of finance reports that provides links, descriptions, and subject areas.

- [View the catalog here](#)

## Rutgers Tableau Training Resources

[Learn about Rutgers Tableau](#)

[OIT Tableau training](#)

[How to develop financial reports in Tableau](#)

[General Ledger Self Service Analytics training guide:](#)

[Training Sample Workbooks](#)

[Financial Management System Payroll Distribution \(PD\) Training Guide](#)