



EMORY
UNIVERSITY

Office of the Senior
Vice President for Research

Introduction to Research Administrations Dashboards using Tableau

**Research Analytics Summit
March 2024**

**Alex Wagner,
Director of Research Administration Analytics
Emory University**



Agenda

- NSF HERD Survey Quick Overview
- Data Management and Quality (always important!)
- Tableau Resources
- Importing data into Tableau
- Creating worksheets
- Dashboard examples
- Q&A



EMORY
UNIVERSITY

Office of the Senior
Vice President for Research



NSF HERD Survey Quick Overview

- Higher Education Research and Development (HERD) Survey
- Primary source of data on R&D expenditures in higher ED
- More than 900 institutions annually (>\$150,000)
- Most recent publicly available survey is from FY22
- <https://nces.nsf.gov/surveys/higher-education-research-development/2022#data>



EMORY
UNIVERSITY

Office of the Senior
Vice President for Research



Data Management and Quality (always important!)

- Data rarely comes in a clean form for analysis
- Always carefully review data and context
- For example, dollar amounts are in thousands of dollars
- Data cleaning and transformations can be 80% of the work
- See examples NSF HERD data documentation



EMORY
UNIVERSITY

Office of the Senior
Vice President for Research



Tableau Resources

- Tableau (Salesforce) provides a lot of online resources
- LinkedIn Learning and others (reach out to your library)
- Tons of Tableau Interest Groups, including Higher Ed
- Tons of Tableau YouTube Channels and Experts
- Colleagues! Including IR and other BI professionals



EMORY
UNIVERSITY

Office of the Senior
Vice President for Research



Tableau!

- Use NSF HERD Short Survey
- Connecting to data
- Reviewing the data
- The worksheet area
- Creating worksheets
- Dashboard Examples



EMORY
UNIVERSITY

Office of the Senior
Vice President for Research





EMORY
UNIVERSITY

Office of the Senior
Vice President for Research

Questions?

Alex Wagner
alexander.wagner@emory.edu
Emory University

