



SRA INTERNATIONAL  
ANNUAL MEETING  
**CHICAGO 2024**  
OCTOBER 26-30

# Introduction to Research Administrations Dashboards using Tableau

Alex Wagner  
Director of Research Analytics  
Emory University



EMORY  
UNIVERSITY

Office of the Senior  
Vice President for Research



# Agenda

- Emory University's Research Enterprise
- Research Data Analytics Team and Roles
- Data Management and Quality (always important!)
- Tableau Resources
- Importing data into Tableau
- Creating worksheets
- Dashboard examples!
- Q&A

# Emory University's Research Enterprise

- Atlanta, GA
- R1:Very high research activity
- FY23 NSF HERD TRE >\$1B
- About 61% Total Federal
- About 26% Total Institutional
- About 66% Health Sciences
- Most of that is from NIH



# Research Data Analytics Team and Roles

- Formed in October 2020 and build out since
- 4 FTE
- Support ORA and SVPR
- Vision: Best Research Administration Unit in the nation
  - #1: Develop Strong and Supported Workforce
  - #2: Pursue and Reach Operational Efficiency
  - #3: Built Robust and Resilient Infrastructure
- Strategic & Competitive Analysis, Operational, HR...
- Everyone is required to train in Research Administration
- Tools reach from Excel, SQL Developer, Oracle Analytics, SPSS, JMP, PowerBI to Tableau

# 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 (e.g. NSF HERD Survey)
- Data cleaning and transformations can be 80% of the work
- <https://nces.nsf.gov/surveys/higher-education-research-development/2022#data>
- <https://report.nih.gov/funding/categorical-spending#/>

# 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

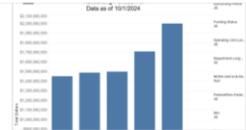
# Tableau!

- Review the data in a tool of your choice
- Connect Tableau to the data
- The worksheet area
- Create worksheets

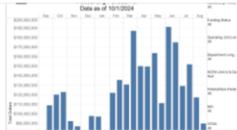


# Dashboard Examples!

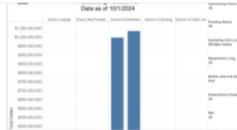
Select All



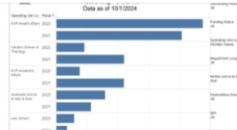
📄 ☆ ...



📄 ☆ ...

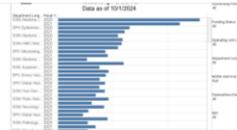


📄 ☆ ...

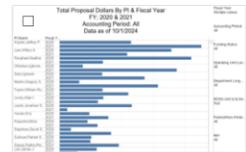


📄 ☆ ...

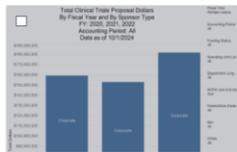
Sort By: Sheet (first-last) ▾



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



📄 ☆ ...



# Questions?

Alex Wagner  
[alexander.wagner@emory.edu](mailto:alexander.wagner@emory.edu)  
Emory University

