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Introduction to Research Administrations Dashboards using Tableau

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Agenda

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



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>



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



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!

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





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Questions?

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