User's Guide: Accessing MU's Research Productivity Reports

Visit Tableau.umsystem.edu. You will use your institutional credentials to sign in (and may need to include the domain name in your sign on). If you're not on campus, you must be on the Virtual Private Network (VPN) to access these reports. You may be prompted to enter your credentials twice:
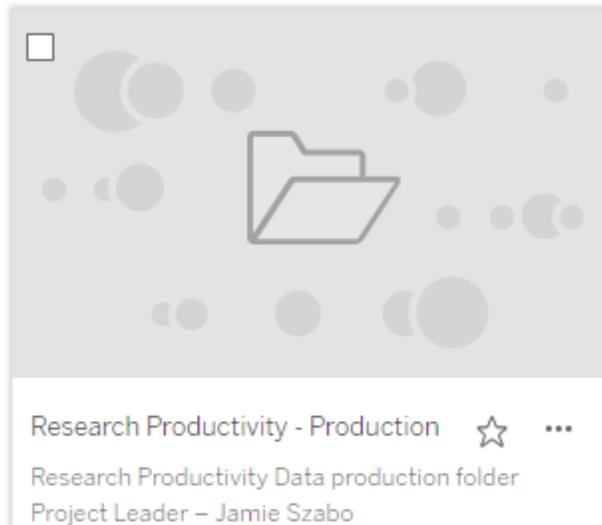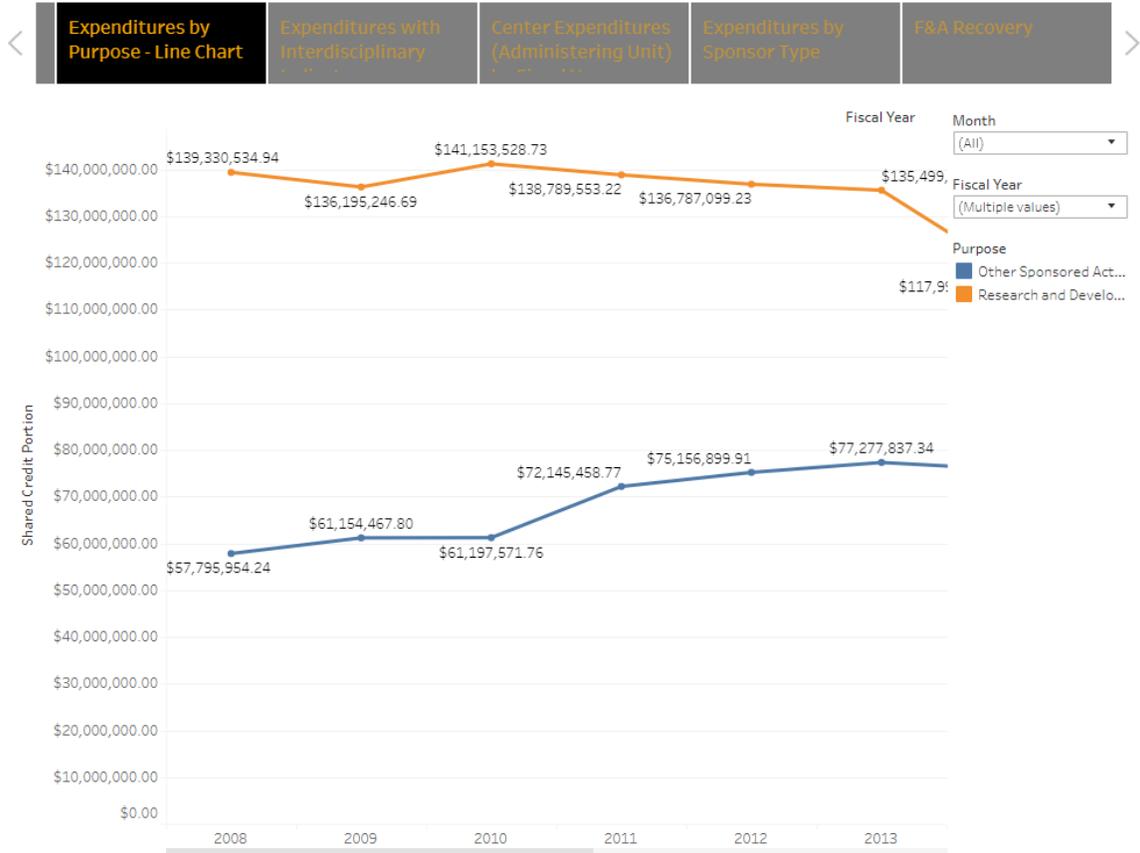
Sign in

https://tableau.umsystem.edu

Username	UM-AD\szaboj
Password	••••••••••••

Sign in   **Cancel**

Find the folder named Research Productivity – Production and click to open:

Research Productivity - Production ☆ •••

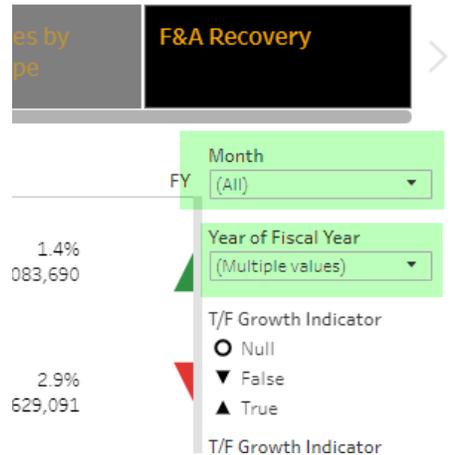Research Productivity Data production folder
Project Leader – Jamie Szabo

Each folder and subfolder has tiles that describe what is included in each report:

You can navigate through the reports by clicking the arrows to the left and right of the tile bar:
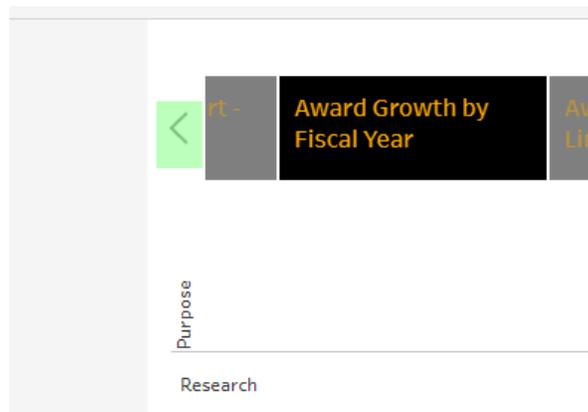
Most reports have filters to allow you to customize your view:

You can use the path at the top of your screen to navigate through the folders:
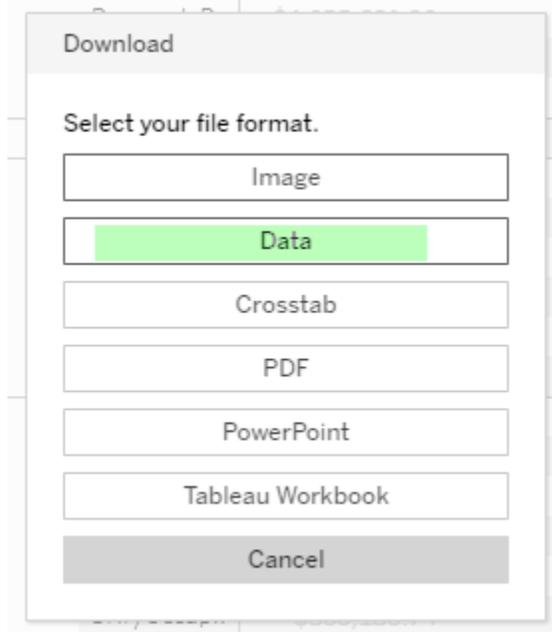

How to view underlying detail:

Select the field for which you want to see the underlying detail:

Click "Download" in the upper right hand corner of your screen:

Click "Data" in the pop up box.

Click on the "Full Data" tab, check the "Show All Columns" box, then click the hyperlink to "Download all rows as text".

This option will give you a .csv file, which can be used similarly to Excel. You can perform a "File"/"Save As" and change the document type from .csv to .xls(x).

If you don't get the option to "View Data", there is an alternative method for viewing the underlying data. Click on the cell for which you need to see the underlying detail, then go to the top of your screen and click "Download".
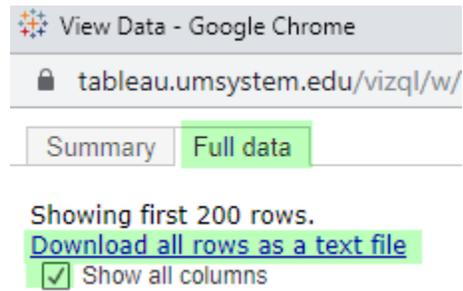

From the pop-up menu, select "Data".

Make your download selections. Remember that by selecting "Download all rows as a text file" will open a .csv file, which allows for much of the same sort and filter functionality as an Excel file.

Contents of Folders and Subfolders

Institution Level Data
Subfolder 1: Institutional Level Metrics – Proposals, Awards, Expenditures, and Recovered F&A at the campus level. Reports allow for filtering by fiscal year and month.

Subfolder 2: College Comparative – Proposals, Awards, Expenditures and F&A Recovered by Shared Credit and Administrative Unit (based on the deptID associated with the project) down to the College/School/Division level. Reports allow for filtering by fiscal year and month.

College/School/Division Level Data
Each CSD has a subfolder named by Division Node (i.e. CMED, CHES, CENGR). Within each subfolder is a Research Productivity dashboard, which contains Proposals, Awards, and Expenditures by Shared Credit down to the department and investigator level.

Note that the investigator level reports are based on HR or tenure home as indicated in PS HR in an effort to show activity for investigators who have an administrative home outside the college.

New Awards and Proposals
This is a static report that is based on proposals submitted or awards recorded in PS GM for the previous week. A pdf version of this report is emailed every Monday, system wide, from the MU Office of Research and Economic Development.

Proposals: In order for a proposal to appear on this report, the Due Date that was entered in PS GM must have fallen within the previous week, and the proposal must have been changed from "Draft" status to "Submitted" status by the Office of Sponsored Programs Administration.

Awards: Any funding that is added to a project by the Office of Sponsored Programs Administration in the previous week will appear on this report. This means that continuation funding and some budget reallocations will appear on the report as well (i.e. moving carry over budget from one year to the next). Exception: there are certain projects that are sensitive in nature and will not appear on this report.