Adding Role Data to a Data Set

Last Modified on 09/21/2023 9:33 am EDT

Overview

Administrators can add Role Data to a Data Set to visualize data about how their team and individuals on their team are performing on Dashboards.
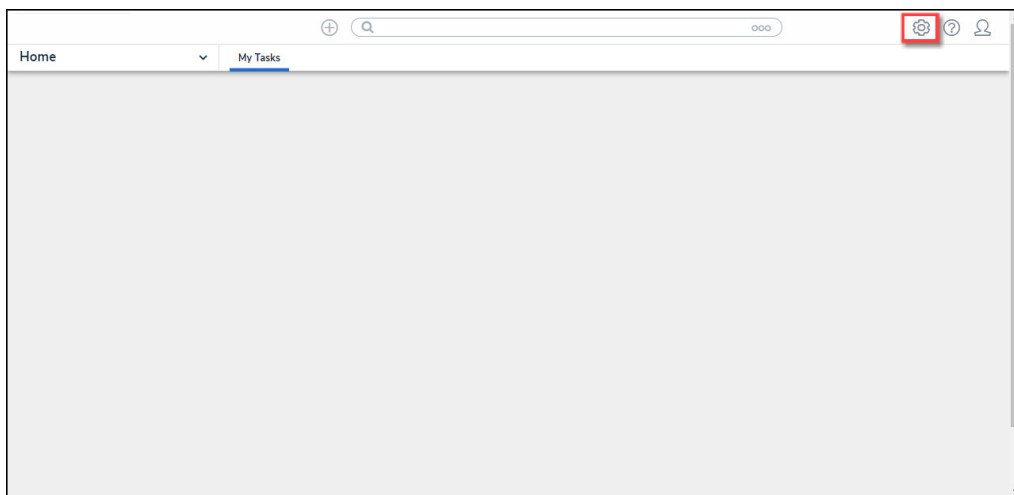
User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Dashboard Data Set Builder.

Related Information/Setup

Please refer to the Creating a New Dashboard Data Set article for more information on adding a Data Set to the system.
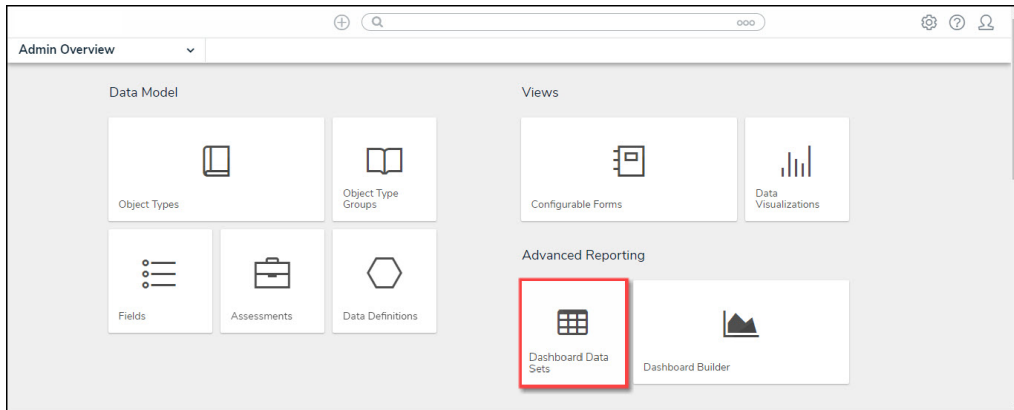
Navigation

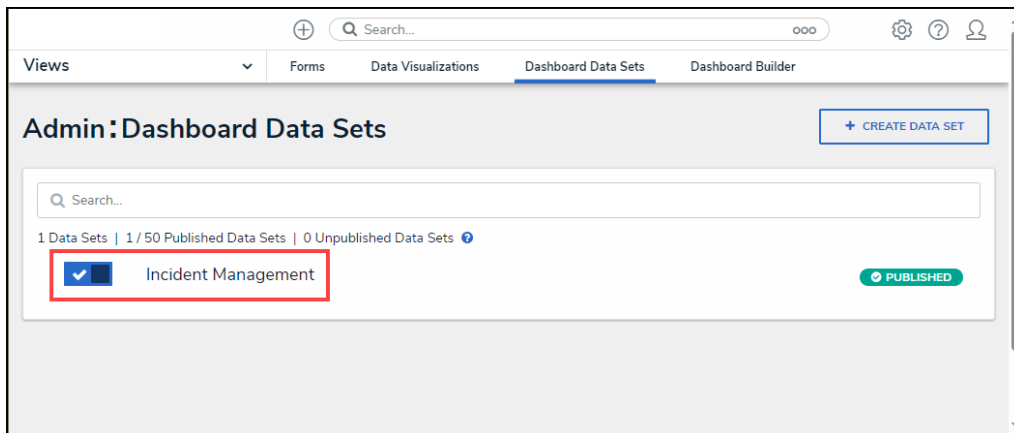1. From the **Home** screen, click on the **System** icon.

System Icon

2. From the **Admin Overview** screen, click on the **Dashboard Data Sets** tile under the **Advanced Reporting** section.
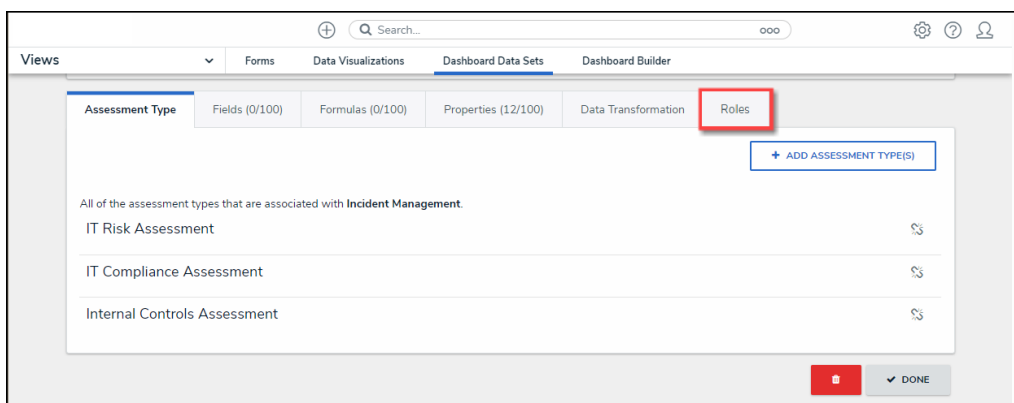
Dashboard Data Sets Tile

Adding Geolocation Data to a Data Set

1. From the **Admin: Dashboard Data Sets** screen, click on a **Data Set**.
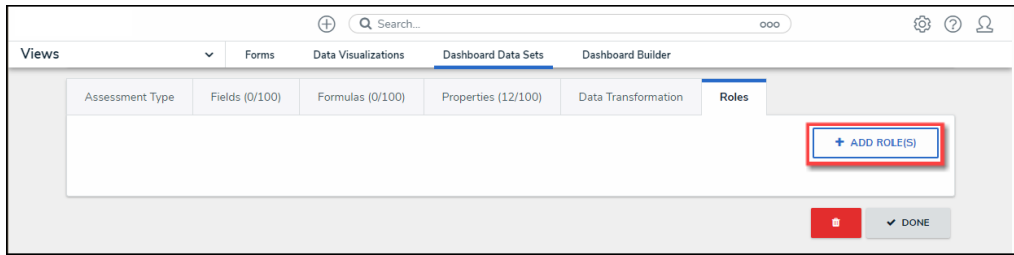

Data Set

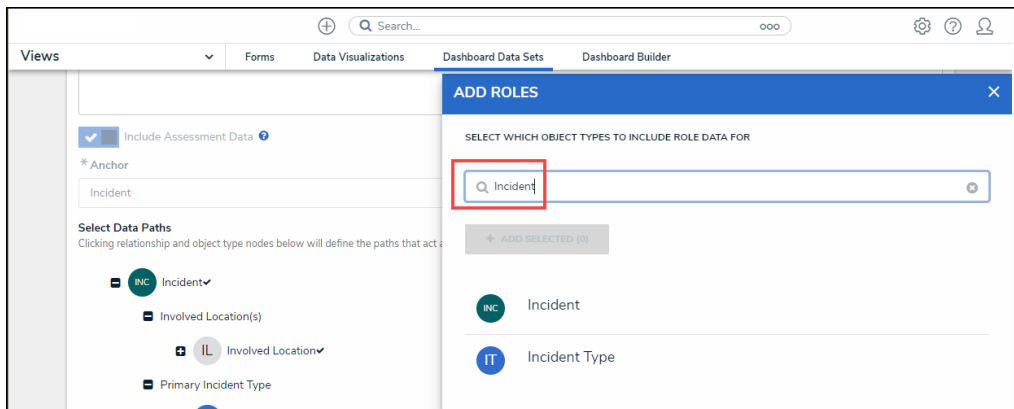2. From the **Admin: Edit Data Sets** screen, scroll to the tab section and click the **Roles** tab.

Roles Tab

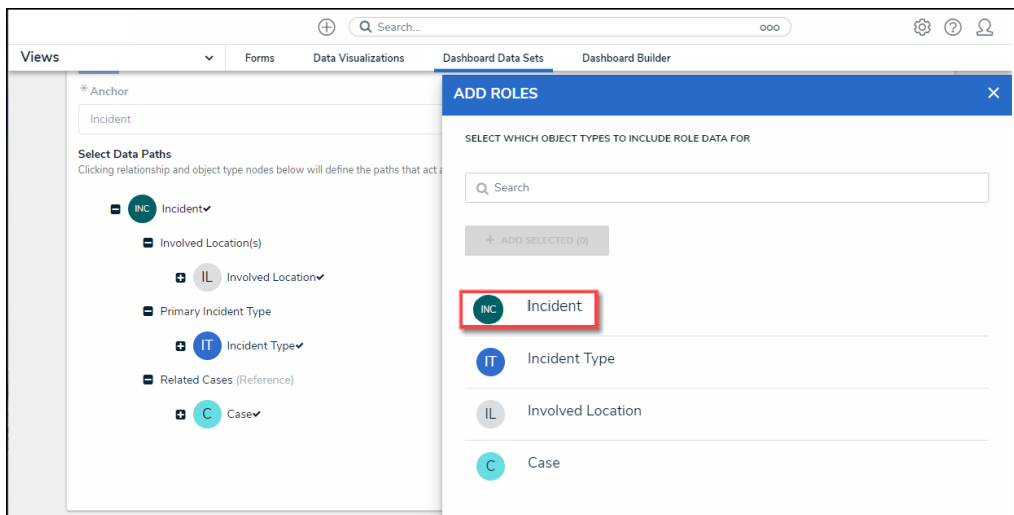3. From the **Roles** tab, click the **+ Add Role(s)** button.

+ Add Role(s) Button

4. From the **Add Roles** pop-up, enter a Role Name in the **Search** field to narrow the search results.
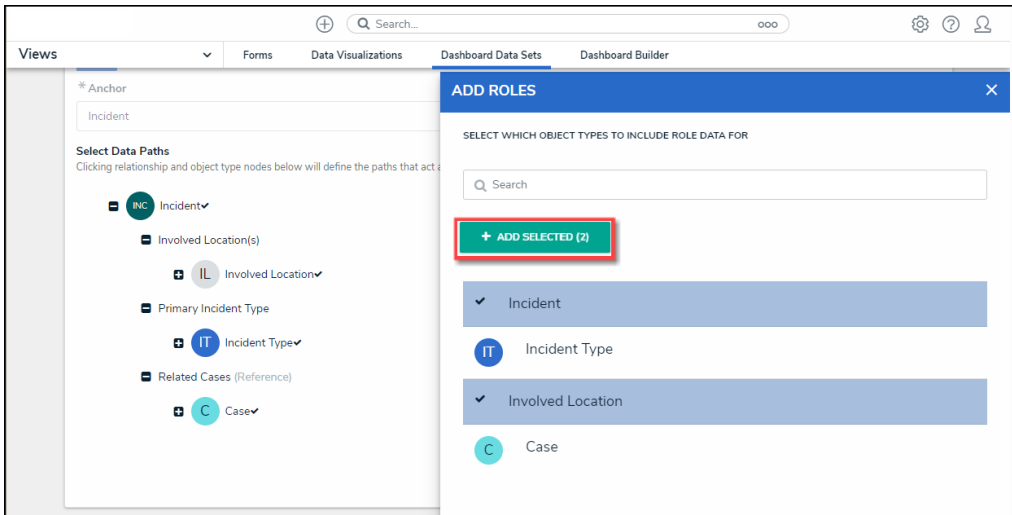

Search Field

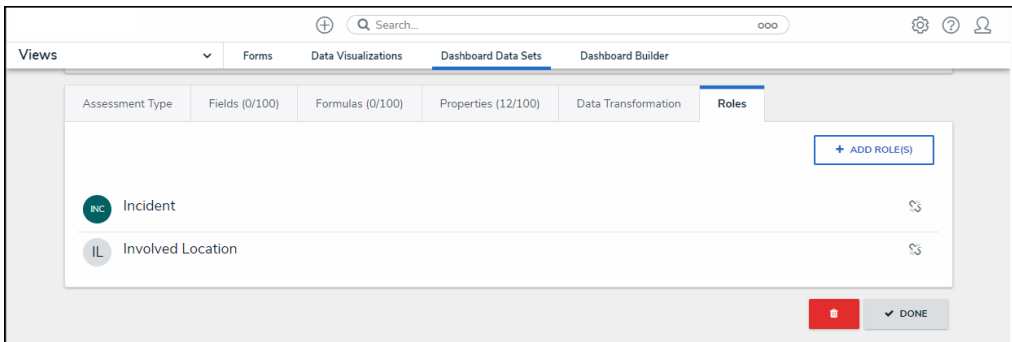4. Click the **Role** or Roles you want to add to the Data Set.

Roles Link

5. When you have selected all the desired Roles, click the **+ Add Selected** button to add the Roles to the Data Set.

+ Add Selected Button

5. The selected Roles will appear on the **Roles** tab.

Roles Tab