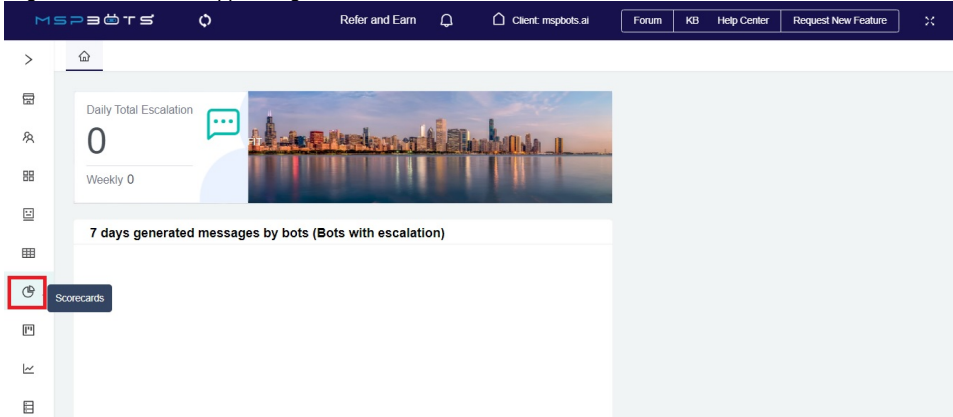


How to Clone a Scorecard

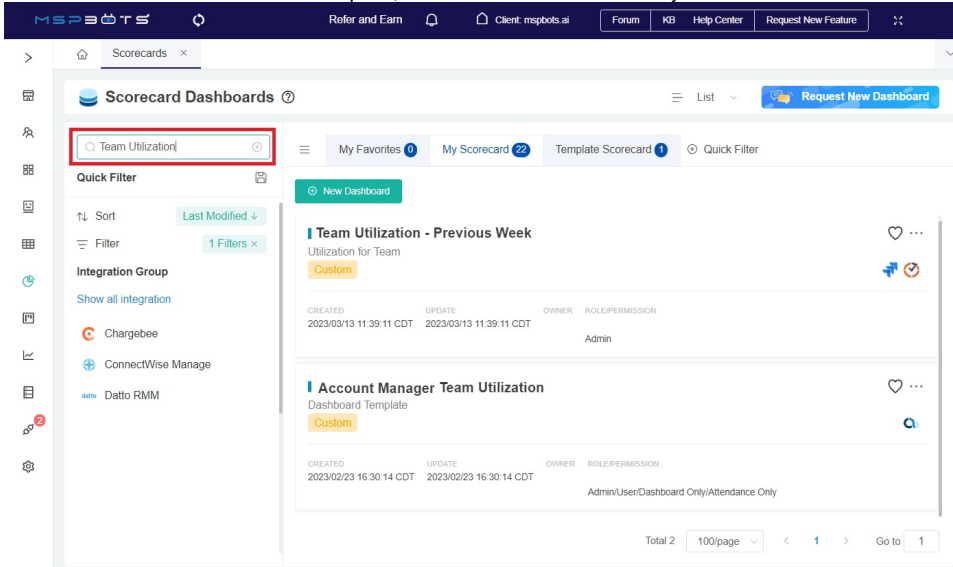
The Scorecard Dashboards section of the MSPbots app is where you can identify targets for individuals or teams and see how they score against these targets. To ensure that your scorecards are consistent among team members and to save time in recreating the same scorecard for multiple members or teams, you can clone a scorecard and modify the user for each widget.

Here's how you can clone a scorecard:

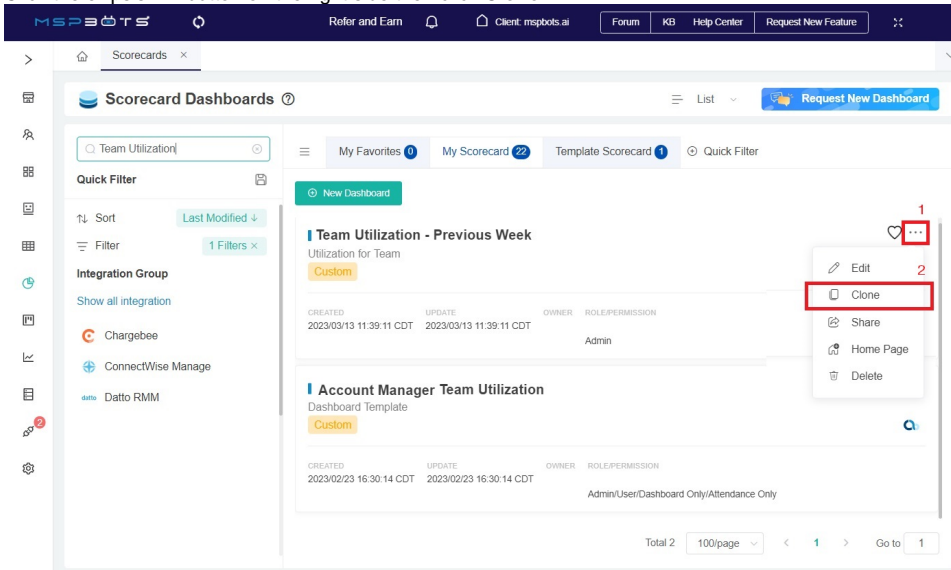
1. Log in to the MSPbots app, and go to [Scorecards](#).



2. When the Scorecard Dashboards tab opens, search for the dashboard that you want to clone.



3. Click the ellipsis *** button on the right side then click **Clone**.



4. When the Clone pop-up appears, tick the checkbox for **Clone the Associated Widgets**. You can also review and modify the following as needed:

- **Name** - Give the scorecard a new name.
- **Role** - Make sure the roles that need access to the scorecard are selected.
- **Description** - Enter your scorecard's description here.

The screenshot shows the 'Clone' pop-up form. At the top, it says 'Name your new custom dashboard and select the widgets to be used in the dashboard on the next page.' Below this are several fields: 'Name' with the value 'Team Utilization - Previous Week_clone_2023-05-11T22:50:5', 'Role' with a dropdown menu showing 'User' and '+ 3', 'Tag' with a dropdown menu showing 'Tag', and 'Description' with the value 'Utilization for Team Alpha'. The 'Clone The Associated Widgets' checkbox is checked and highlighted with a red box. At the bottom right, there are two buttons: 'More Edit' and 'Continue'.

5. Click **Continue**. This will open the cloned scorecard.

6. When the tab of the cloned scorecard opens, go to the right side of the screen and click the **Show Scorecard** icon.

The screenshot shows the MSPbots dashboard with a cloned scorecard titled 'Team Utilization - Previous Week_clone_2023-05-11T22:50:52Z'. The 'Show Scorecard' icon is highlighted in the top right corner.

User	KPI	Current Value	Benchmark
George J. Smith	Utilization Product - Service Layer - Team Utilization	98.8%	85%
Karin Douglas	Utilization Product - Marketing - Team Utilization	99.7%	85%
Erica Cline	Utilization Product - Sales - Team Utilization	93.6%	85%
Charm Gagliardi	Utilization Product - Client Support - Team Utilization	73.6%	85%
Scott Gagliardi	Utilization Product - Data Governance - Team Utilization	105.5%	85%

7. Hover over the upper-right corner of the scorecard, click the ellipsis *** button, and select **Edit**.

The screenshot shows the MSPbots dashboard with the cloned scorecard. The ellipsis button in the top right corner of the scorecard is highlighted, and the 'Edit' option is selected in the context menu.

8. Next, go to **Dataset** on the Widget Builder window, click on the ellipsis *** button, and select **Edit**.


The screenshot shows the Widget Builder window. The 'Dataset' tab is selected, and the 'Edit' option is selected in the context menu for the 'Jira Tempo Flow in the Last 30 Days' dataset.

If you have more layers of data, repeat this and the next steps for all the layers.

9. On the Dataset window that opens, find the **real_name** filter and type or select the name of the team member.

Dataset ×













Dataset:

Jira Data Center / Jira Tempo Flow in the Last 30 Days ⌵ 

Show datasource name as

Columns Display:

[Select All](#) [Clear All](#)

Column Name	Alias	Business Type	
real_name ⌵ 	Real Name	Text ⌵ 	 
create_time ⌵ 	Create Time	Date Time ⌵ 	 
logged_hour ⌵ 	Logged Hour	Number ⌵ 	 

Filter:

AND **OR** ⊕ ⌵ ⌵

create_time ⌵ In ⌵ {last/1/week: ⌵ Slicer ⊗

real_name ⌵ Equals ⌵ John ⌵ Slicer ⊗


Measure ⊕

Tempo Logged Hours ⌵ ⌵


Other filters that also allow you to select or change users are **email** and **member_id**.

10. Click **Save**.
11. Next, go to **Config** and select a **User**.

Widget Builder ×


 Y Value ⌵

Utilization ⌵


 **Config** ⌵

Value ⌵

Snapshot Date ⌵

 User ⌵


John Smith ⌵


 Refresh Cron ⌵


Please select Refresh Rate ⌵

Benchmark ⌵

85% ⌵

 Date Range: ⌵

 Start Time - End Time ⌵

 Last Days: ⌵

Last ⌵ Days ⌵

Header Text ⌵


Showing date interval ⌵

Preview

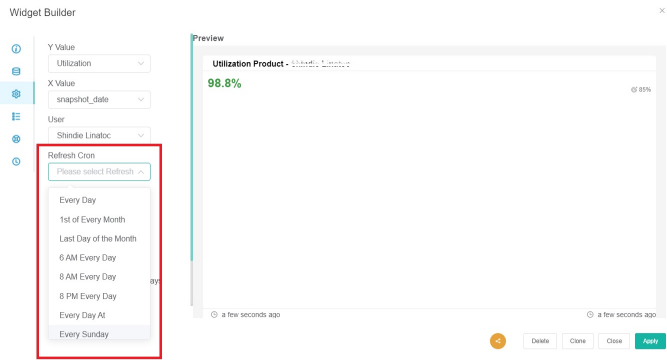
Utilization Product - ⌵

98.8% ⌵ @ 85%

⌵ a few seconds ago ⌵ a few seconds ago

 Delete Clone Close Apply

12. Then select a **Refresh Cron** option to set how often you want the scorecard to generate a snapshot.



13. Click **Save** and click **Apply**.
14. Repeat Steps 7 and onward for every widget that needs to be modified.