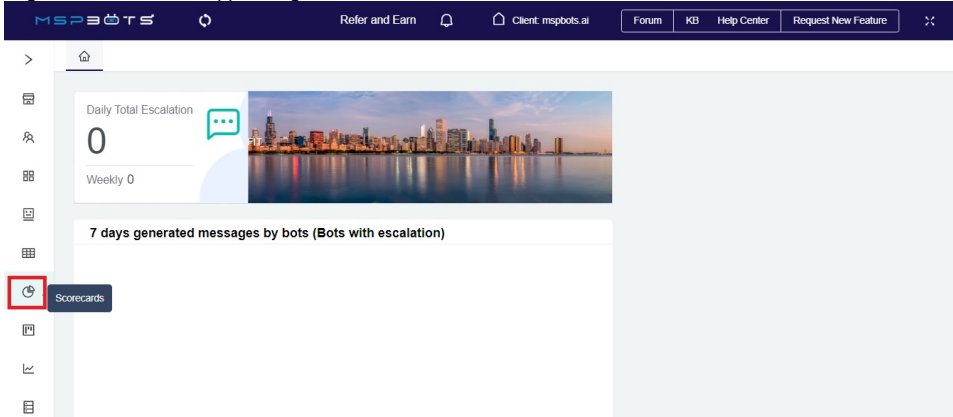


# How to Clone a Scorecard

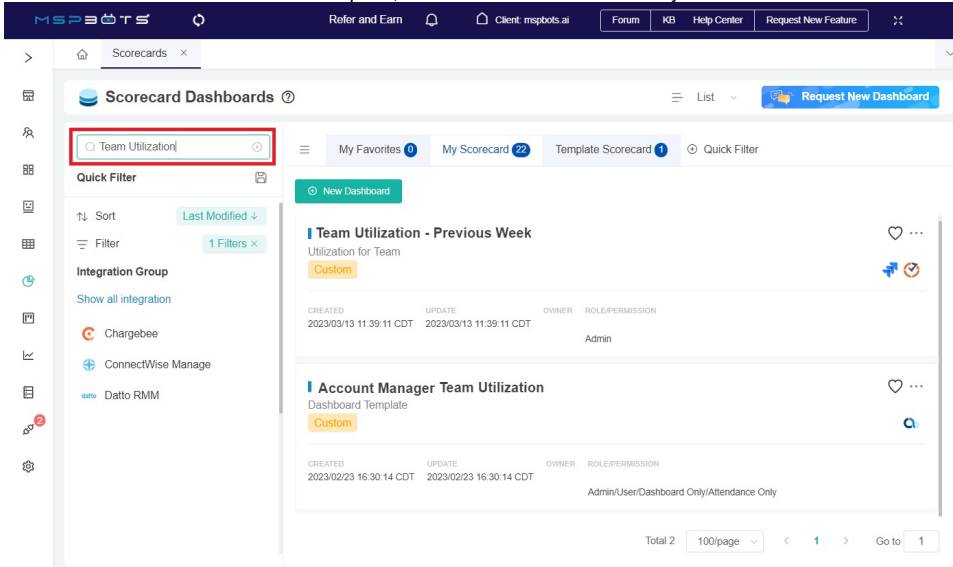
The Scorecard Dashboards section of the MSPbots app is where you can identify targets for individuals or teams and see how they score against these targets. To ensure that your scorecards are consistent among team members and to save time in recreating the same scorecard for multiple members or teams,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

Here's how you can clone a scorecard:

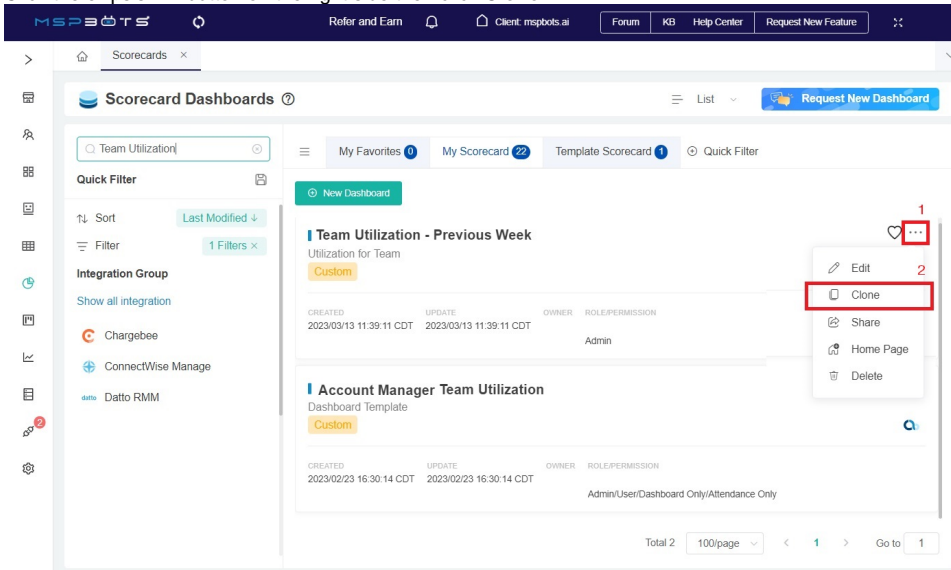
1. Log in to the MSPbots app, and go to [Scorecards](#).



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 a text input containing '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 a text input containing '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 menu is open, and the "Edit" option is selected. The scorecard displays a value of 98.8%.

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 active, and the "Utilization" dataset is selected. The "Edit" option is highlighted in the context menu.

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 <span>⌵</span>    | Real Name   | Text <span>⌵</span>       |   |
| create_time <span>⌵</span>  | Create Time | Date Time <span>⌵</span>  |   |
| logged_hour <span>⌵</span>  | Logged Hour | Number <span>⌵</span>     |   |

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 ⌵


 X Value ⌵


 **Config** ⌵


 Snapshot Date ⌵


 User ⌵


 Refresh Cron ⌵


 Benchmark ⌵

 Date Range: ⌵

 Start Time ⌵ End Time ⌵

 Last Days: ⌵

 Header Text ⌵

 Showing date interval ⌵


**Preview**

Utilization Product - ⌵

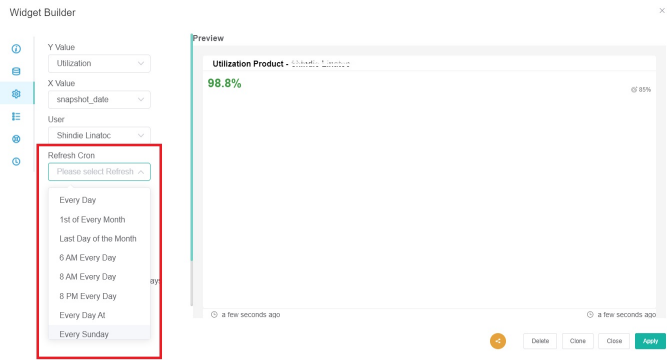
98.8%

@ 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.