Creating a Scorecard Dashboard

What's on this page:

Introduction

This article shows how to create scorecard dashboards in the MSPbots app.

Background Information

Scorecard Dashboards are like other MSPbots dashboards, which allow users to identify actionable data from a single page. Unlike other dashboards, a scorecard dashboard hosts only target card widgets and is useful for monitoring historical values against specific sets of targets.

Required Permissions

Only users with admin permissions can create or edit a Scorecard Dashboard.

Prerequisites

Before you proceed, please make sure that you are logged in to MSPbots as an administrator.

How to Create a Scorecard Dashboard

1. Navigate to **Scorecards** on the MSPbots menu.
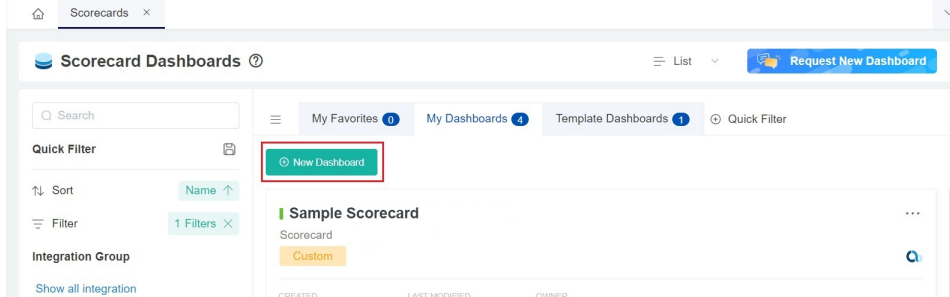
2. On the Scorecards tab, click the **New Dashboard** button to open the Add New Scorecard Dashboard window.
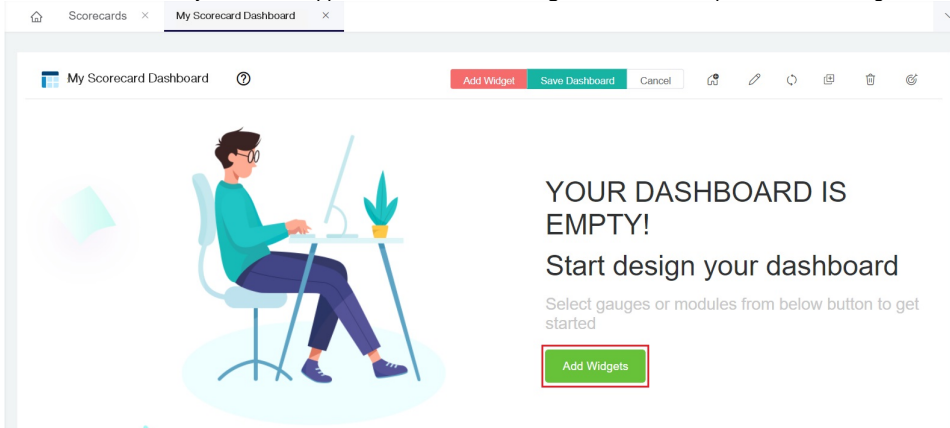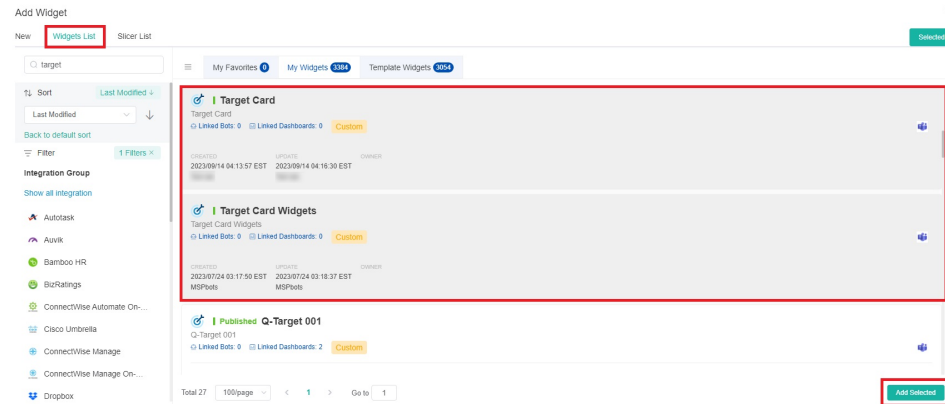

3. On the Add New Scorecard Dashboard window:
   - Give the scorecard dashboard a **Name**.
   - Select the **Role** that will have access to the report. You can select multiple roles.
   - Provide a **Description** for the dashboard.

4. Click **Continue** to start designing your dashboard.
5. When the dashboard you created appears, click the **Add Widgets** button. This opens the Add Widgets window.

6. On the **Add Widget** window, click **Widgets List**, and **select** the target card widgets that you want to include in the Scorecard Dashboard. Finally click the **Add Selected** button.
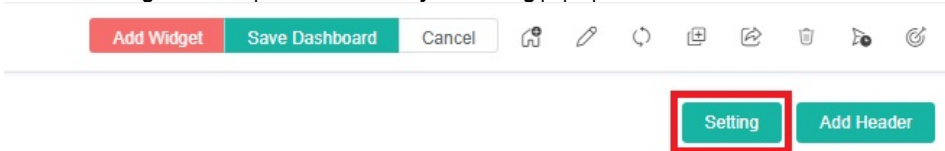

Important

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Only target card widgets are shown in the scorecard dashboard.
The widgets that you have selected will now appear in the scorecard dashboard.

7. Click the **Setting** button to open **Scorecard Layout Setting** pop-up window.

8. On the **Scorecard Layout Setting** window, configure the following fields, then click **Save**.

- **Top tier Unit** - Configure how the data is displayed at intervals. Currently, only the following three options are supported:
  - Every Day - Display data for each day
  - 1st of Every Month - Display data for each month
  - Every Sunday - Display data for each Sunday
- **Top tier Format** - The format of the top tier date. Supported formats include **YYYY MMM DD**, **MMM DD, YYYY**, and **MM DD, YY**.
- **Default View** - Choose how the widgets are presented on the dashboard. Select **Graphs View** or **Table View**.

- **Show User Name** - Enable this switch to display the user name for each widget on the scorecard dashboard.

9. Click the **Add Header** button to add a header to the scorecard dashboard.

10. On the **Add Header** window, enter the desired header name and click **Save**. If you want to modify the added header, simply click on the header to edit it. You can add multiple headers. To delete the header, follow the same process.

11. Click **Save Dashboard** on your Scorecard Dashboard to save your settings.

12. When the page displays **Dashboard layout save success** it indicates that the creation was successful.

Check-in

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- Now you can not only modify the existing values of widgets in the scorecard dashboard, but also add values to blank fields in your scorecard dashboard. However, if all the values of a widget in the scorecard dashboard are blank, you cannot add values to the empty fields. When you modify field values or add values to blank fields, you can also add comments to key performance indicator fields in the scorecard. Here are the step-by-step instructions:
    a. In scorecard dashboard window, click the empty field or the field value you want to modify.
    b. In **Check in** pop-up window, click again the empty field or the field value you want to modify, and enter the new value in **New Value**, then add a comment in **Comments**.
    c. Click **Check In**.

- With regards to **Check in History**, it keeps a record of the modifications you made to field values and the comments you added to certain fields. You can click **Check in History** to view these modification histories. If you added comments to the fields of key

performance indicators in the scorecard dashboard, you can quickly identify which fields are the key indicators through the comments.

Related Topics

- [How to Create a Target Card Widget](#)
- [What Filter Conditions and Formats are Available for Creating Widgets](#)
- [How to Create Slicers in Widgets](#)
- [Creating a Column Chart Widget](#)
- [Creating a Grid Widget](#)
- [Creating the Line Chart and Stacked Line Widgets](#)
- [Creating a Card Number Widget](#)
- [Creating a Pie Chart Widget](#)
- [Creating a Progress Tracker Widget](#)
- [How to Clone a Widget](#)
- [Prebuilt Widgets](#)
- [How to Add PSA Hyperlinks to Ticket Numbers in a Widget](#)
- [Adding a Calculate Layer to a Widget](#)