

# Creating a Scorecard Dashboard

What's on this page:

- [Introduction](#)
- [Background Information](#)
- [Required Permissions](#)
- [Prerequisites](#)
- [How to Create a Scorecard Dashboard](#)
- [Related Topics](#)

## Introduction

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

## Background Information

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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

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

## Prerequisites

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

## How to Create a Scorecard Dashboard

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1. Navigate to **Scorecards** on the MSPbots menu.



Apps

Bots

Dashboards

Scorecards

Widgets

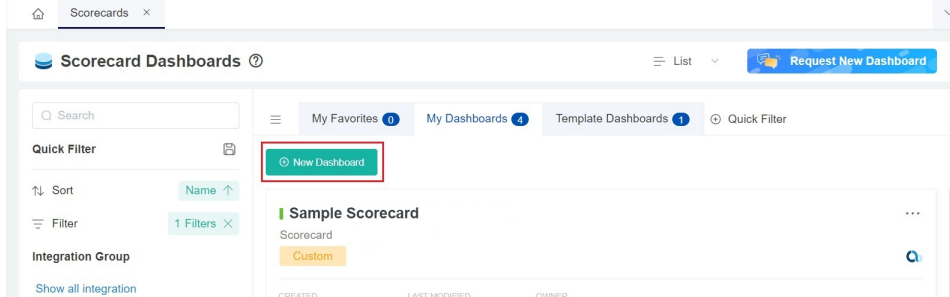
Datasets

Integrations

Settings



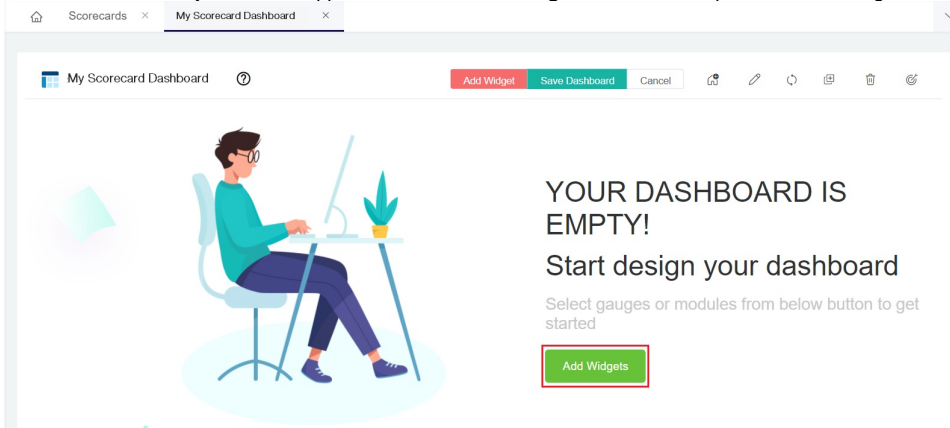
2. On the Scorecards tab, click the **New Dashboard** button to open the Add New Scorecard Dashboard window.



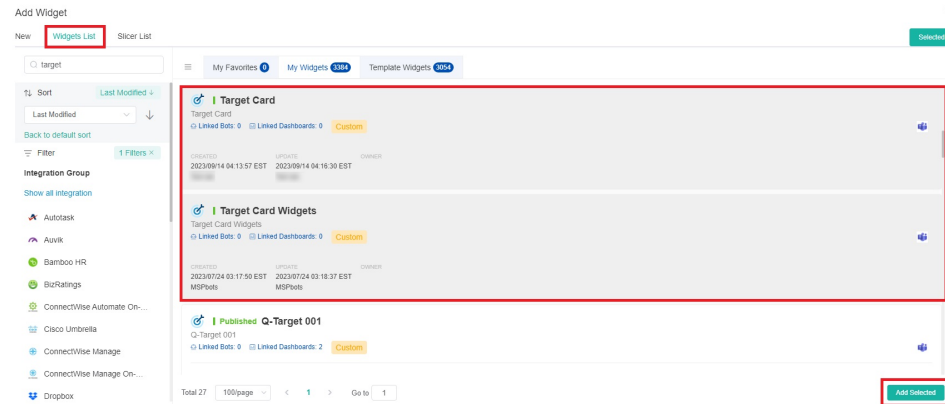
3. On the Add New Scorecard Dashboard window:
- Give the scorecard dashboard a **Name**.
  - Select the **Role** that will have access to the report. You can select multiple roles.
  - Provide a **Description** for the dashboard.

A screenshot of the 'Add New Scorecard Dashboard' window. It has a title bar with a close button. The main content area has a heading 'Add New Scorecard Dashboard' and a subheading 'Name your new custom dashboard and select the widgets to be used in the dashboard on the next page.' Below this are four form fields: 'Name' (with a red asterisk) containing 'My Scorecard Dashboard', 'Role' (with a red asterisk) containing 'Admin' and 'User', 'Tag' (containing 'Tag'), and 'Description' (with a red asterisk) containing 'This is the description...'. A green 'Continue' button is at the bottom right.

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.



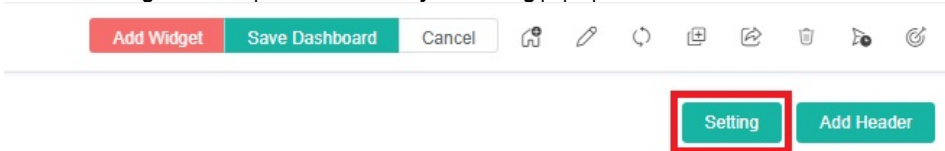
### Important

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

New Scorecard

User	KPI	Current Value	Benchmark	Nov 16, 2023	Nov 15, 2023	Nov 14, 2023	Nov 13, 2023	Nov 12, 2023	Nov 11, 2023	Nov 10, 2023
John Smith	Target Card 001	33	20	33	33	33	33	33	33	33
user1	Q-Target 001		chmark							
	Target Card Widgets	33	30	33	33	33	33	33	33	33
user1	Target Card	33	30							

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.

Scorecard Layout Setting

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Top tier Unit

Every Day

Top tier Format

YYYY MMM DD

Default View

☐ Graphs View
 ☒ Table View

Show User Name

☒

Cancel

Save

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

Add Widget

Save Dashboard

Cancel

Setting

Add Header

- 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.

New Scorecard

Add Widget

Save Dashboard

Cancel

Setting

Add Header

User	KPI	Current Value	Benchmark	Jul 17, 2023	Jul 17, 2023	Jul 17, 2023	Jul 18, 2023	Jul 19, 2023	Jul 20, 2023	Jul 21, 2023
username1	Target Card 001	33	20	28	28	28	28	28	28	28
user1	Q-Target 001		chmark	0	0	0			23	
	Target Card Widgets	33	30							
user1	Target Card	33	30							














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

Add Widget

Save Dashboard

Cancel

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

Technical Services Individual Metrics					Design							
User -	KPI -	Current Value -	Benchmark -	Sep 15, 2023	Sep 08, 2023	Sep 01, 2023	Aug 25, 2023	Aug 18, 2023	Aug 11, 2023	Aug 04, 2023		
 Chris Falco	Time To Resolution - Chris Falco	64.50	< 35 Hours	36.50	44.00	85.35	16.53	58.75	34.00	54.44		
 Chris Falco	Time to First Response - Chris Falco	16.69	< 30 Minutes	17.73	10.09	12.50	8.55	9.77	13.45	11.84		
 Chris Falco	Average Interactions - Chris Falco	6.33	< 5 Interactions	3.50	6.50	7.76	4.93	7.92	4.59	6.00		
 Conan Bowling	Time To Resolution - Conan Bowling	94.50	< 40 Hours	2.00	26.50	31.42	33.33	33.10	27.22	29.00		
 Conan Bowling	Average Interactions - Conan Bowling	7.50	< 7 Interactions	10.00	12.50	5.83	6.00	7.50	5.44	4.67		
 Homard Parnacio	Time To Resolution - Homard Parnacio	91.11	< 40 Hours	5.00	63.22	58.86	32.45	77.25	48.50	50.90		
 Homard Parnacio	Average Interactions - Homard Parnacio	6.33	< 7 Interactions	3.00	8.89	9.29	8.09	7.44	6.25	11.70		
 Homard Parnacio	Time to First Response - Homard Parnacio	22.17	< 30 Minutes	24.45	24.17	20.30	26.00	18.93	17.63	18.56		
 Jill Engle	Average Handle Time - Jill Engle	1.86	< 1.5 Hour	2.10	1.80	2.70	4.06	2.71	1.95	2.39		
 Jill Engle	Time to First Response - Jill Engle	30.33	< 30 Minutes	33.63	6.63	22.40	18.89	16.82	14.44	17.62		
 Jill Engle	Average Interactions - Jill Engle	7.21	< 7 Interactions	5.90	7.50	11.14	10.38	8.63	7.50	8.64		
 Jill Engle	Time To Resolution - Jill Engle	61.07	< 40 Hours	23.40	19.63	51.53	32.54	88.63	39.33	51.00		
 Jill Engle	Kill Rate - Jill Engle	66.67%	> 110%	62.50%	114.29%	100.00%	144.44%	80.00%	133.33%	100.00%		

Check-in



- 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:
  - In scorecard dashboard window, click the empty field or the field value you want to modify.
  - 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**.
  - Click **Check In**.

Scorecard Share													
User -		KPI -	Current Value -	Benchmark -	07 16, 23	07 15, 23	07 14, 23	07 13, 23	07 12, 23	07 11, 23	07 10, 23	07 09, 23	07 08, 23
+	User	Scored Cad Jira Issue List	8279	Bug Issue Count	7582	7581	7575	7565	7554	7551	7538	7535	
+	test@12.com	TestCard-Kelven_Scorecard ke	696	30	944	963	965	1019	934	837	904	793	
+	MSPBouts test	Test input blank	449	30	11	10	714						

- 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.

Check-in ×

Target Card Widgets	Timezone: Asia/Shanghai	Benchmark: 30
● 34		2023 Nov 21
● 33		2023 Nov 20
● 33		2023 Nov 19
● 33		2023 Nov 18
● 33		2023 Nov 17
● 33		2023 Nov 16
● 33		2023 Nov 15
● 33		2023 Nov 14
● 33		2023 Nov 13

▼ Check in History

● 34	checked in on 11/21/2023 17:08 CST	2023 Nov 21
check in		

## 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](#)