Guide to Software Enhancements in Scoreboard/QuickScore Version 2.13

Editing Templated Dashboard Copies

In the past, the only way to have similar, but not identical, dashboards across multiple organizations was to make each dashboard an independent copy. Editing these dashboards was a very time consuming and repetitive process with potential for errors.

Dashboard templates were useful for many situations, but only when the copies were identical.

In the latest version of the software, you can now edit templated dashboards to add new objects.

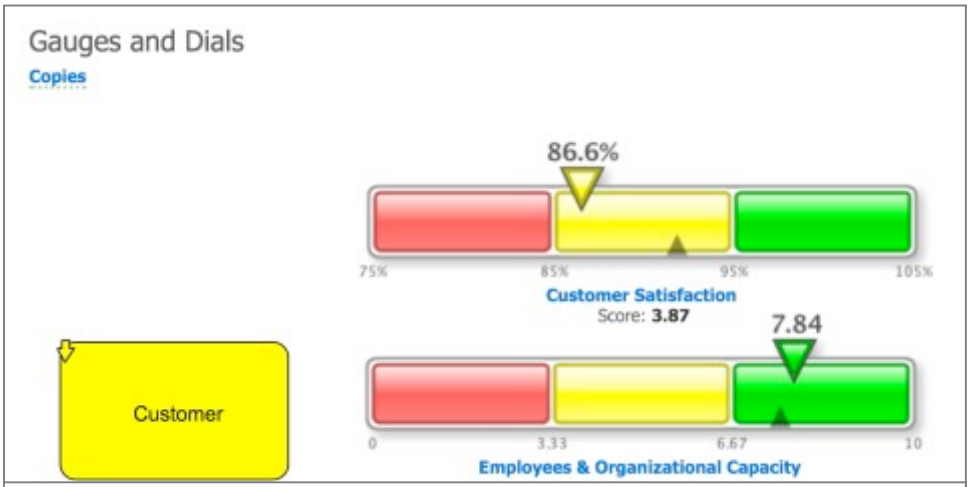

***Figure 1**: A dashboard templat*

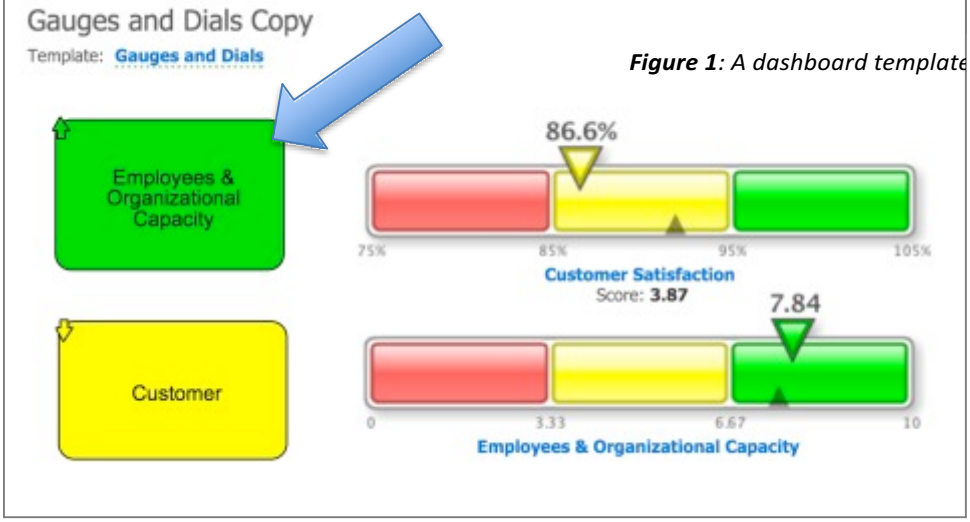

***Figure 2**: A templated copy with a new object adde*

The software still prevents you from editing the objects that come from the template. The one exception is that you can override the drilldown target.

***Figure 3**: Editing the drilldown on a templated object*

When you're editing a templated dashboard copy and you click the Swap button, it still shows you where all of the dashboard objects come from. The software will not allow you to swap the objects' sources, however.

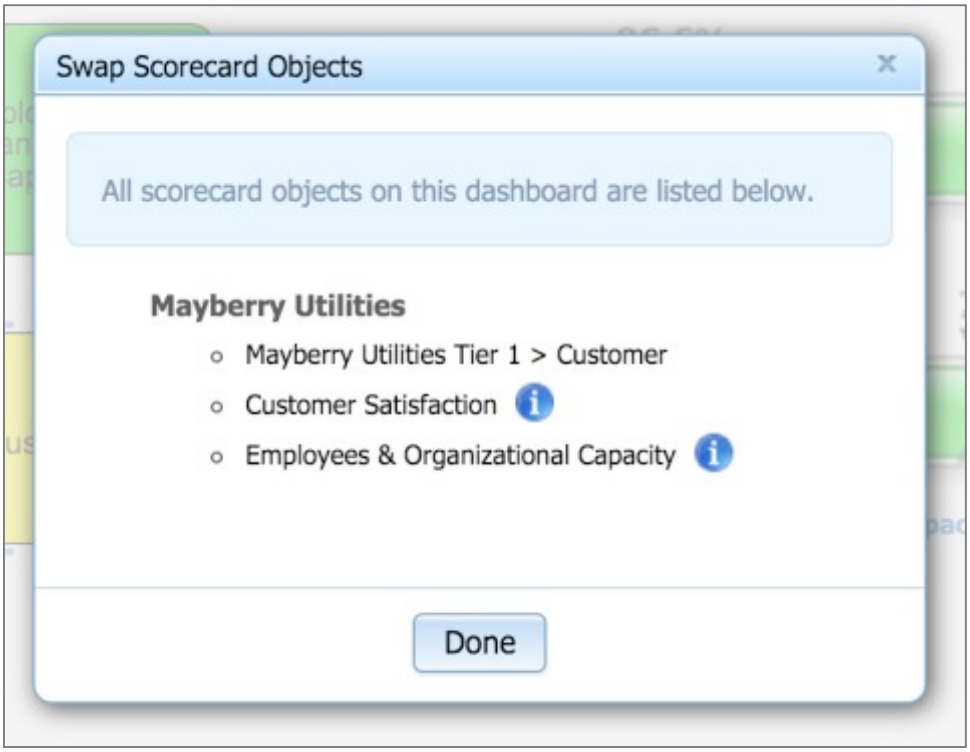

***Figure 4**: The swap dialog for a templated dashboard*

Add Initiative Objects to Dashboards

You can now add several new types of initiative objects to dashboards. Oneof these is the Historical Performance Chart.

***Figure 5**: An EVM historical performance chart*

You can now also show the following initiative data as performance bubbles:

- Name
- Start Date
- End Date
- Budget
- Spent to Date
- Percent Complete
- Percent Time Elapsed
- Projected End Date
- Projected End Date Variance
- Projected Budget
- Projected Budget Variance
- Funds Remaining

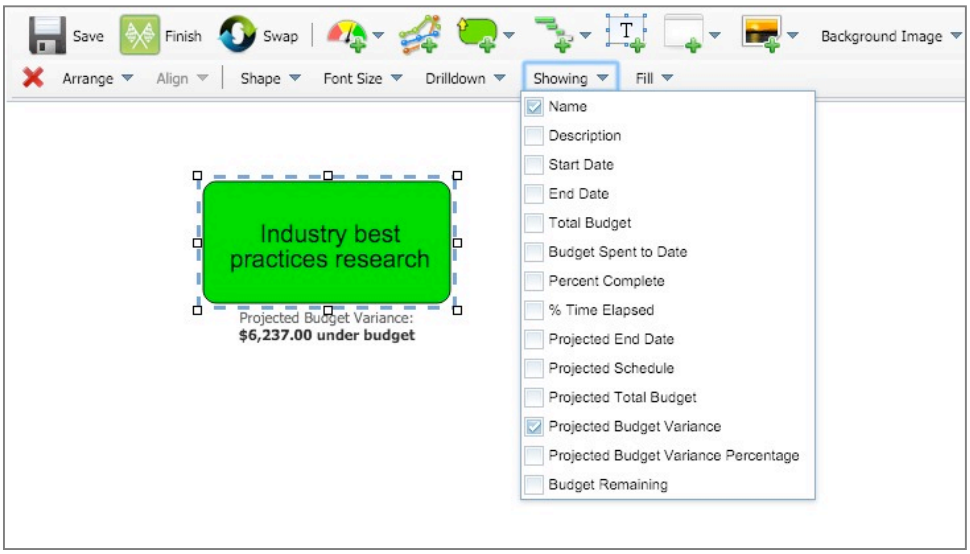

***Figure 6**: Possible display options for initiative objects*

Outline for Dashboard Text Boxes

In the latest version of the software there is now the ability to specify an outline for text boxes. Users can also choose between various outlinethickness options.

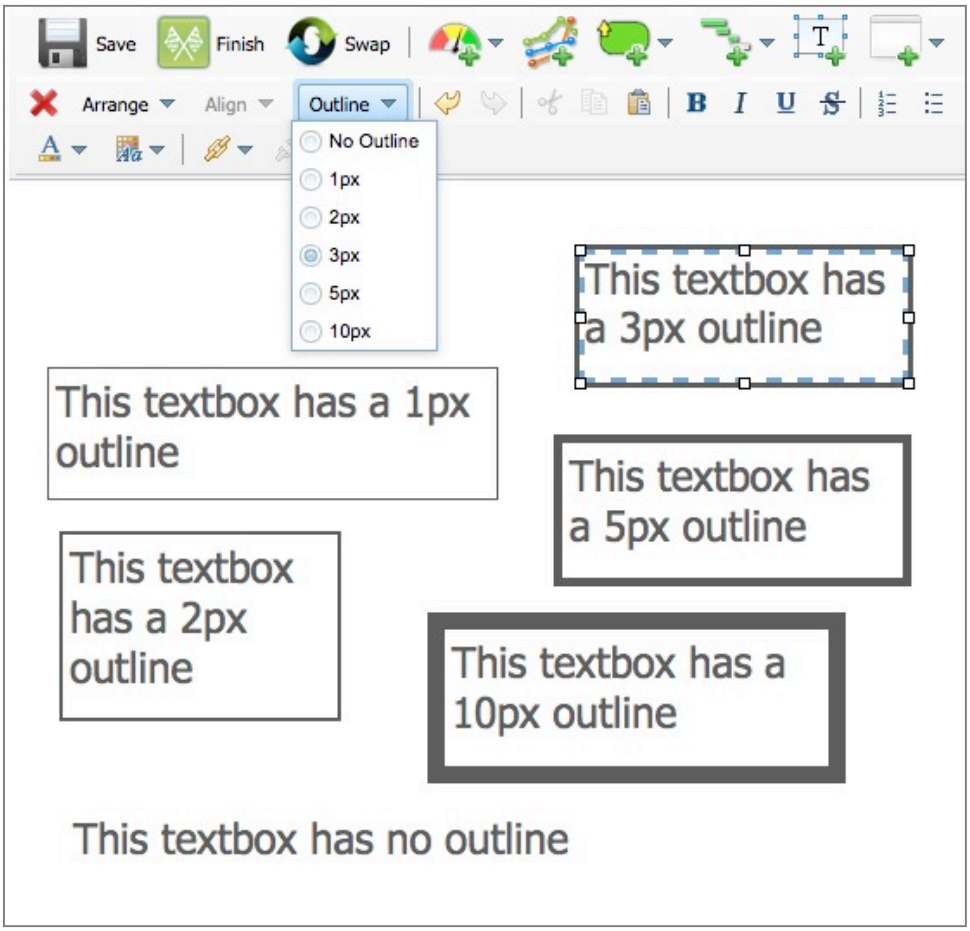

***Figure 7**: The new textbox outline options*

Text Alignmentfor Performance Bubbles

The text alignment of performance bubbles can now be changed in the latest version of the software.

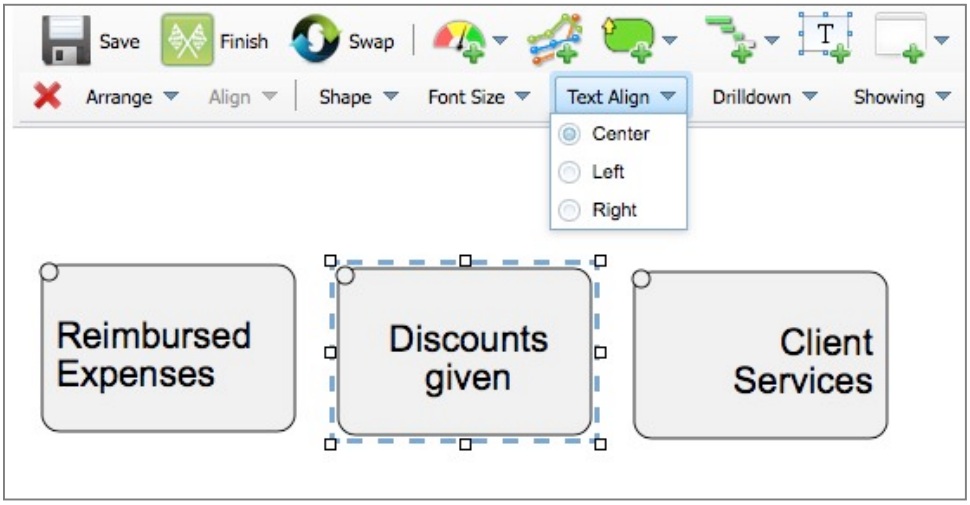

***Figure 8**: The new performance bubbletext align options*

Changing Multiple Dashboard Objects at Once

If you select multiple dashboard objects of the same type, you can now change all of their settings at once. This includes things likeshape, font size, fill, and the data they show.

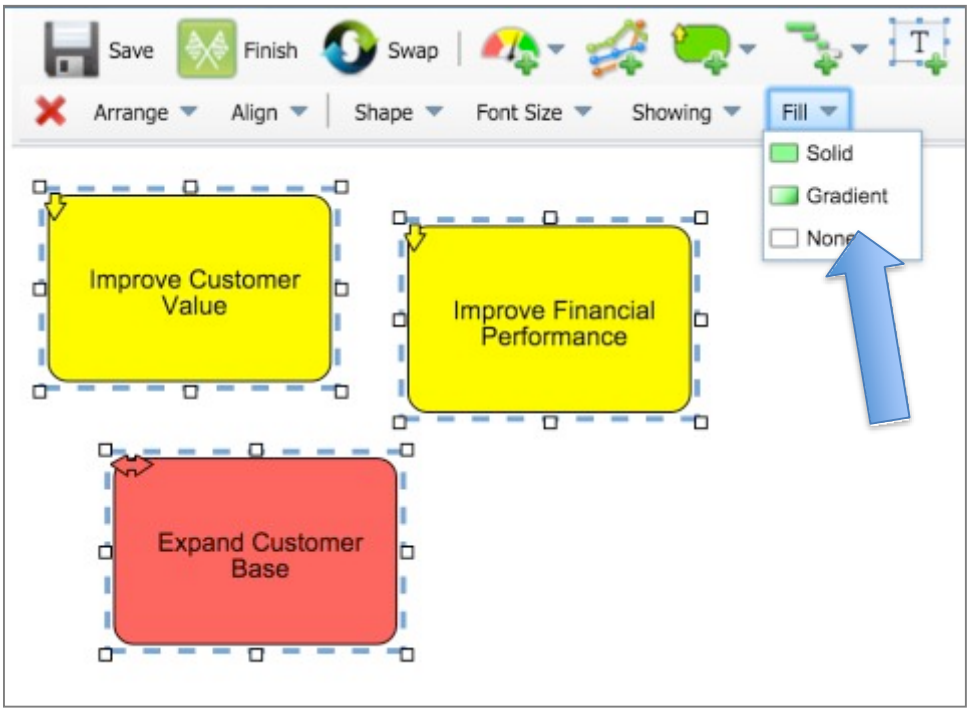

***Figure 9**: Changing multiple objects at once*

Dashboard Edit Windows Stay Open

When you're editing a dashboard, the windows now stay open until you click somewhere else. For example, you'll now be ableto add multipledashboard bubbles by just clicking multipletimes in the tree. Similarly, you can now change multiplethings in the "Showing" menu at once too.

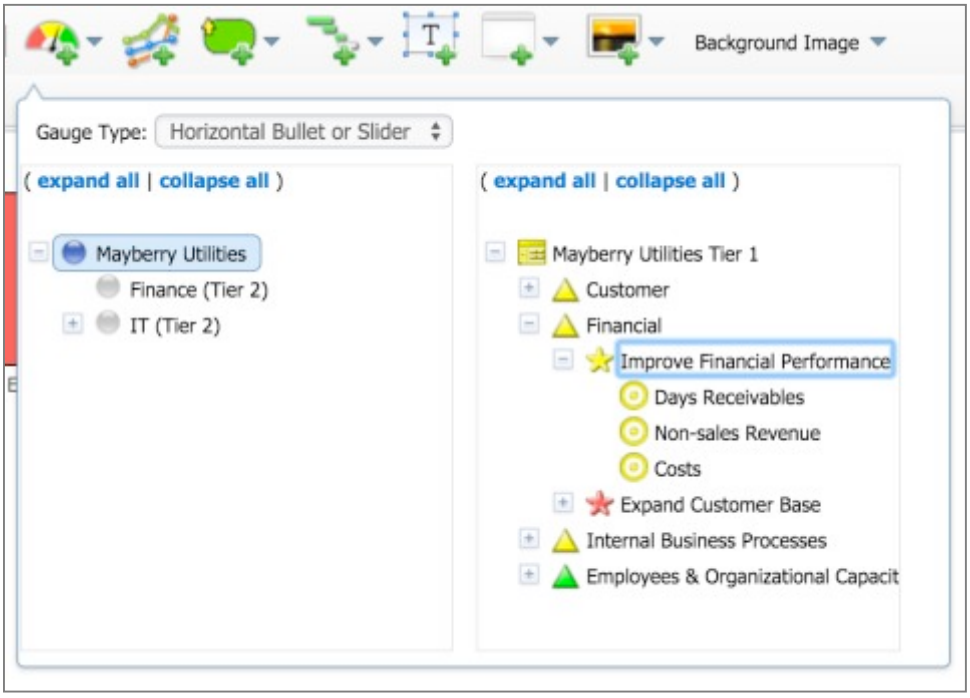

***Figure 10**: An add object menu*

Scorecard Owner/Updater Report Uses Searchable User Selection Control

The scorecard owner/updater report now has a modern user select that allows you to search for users. This matches the functionality in other places in the software.

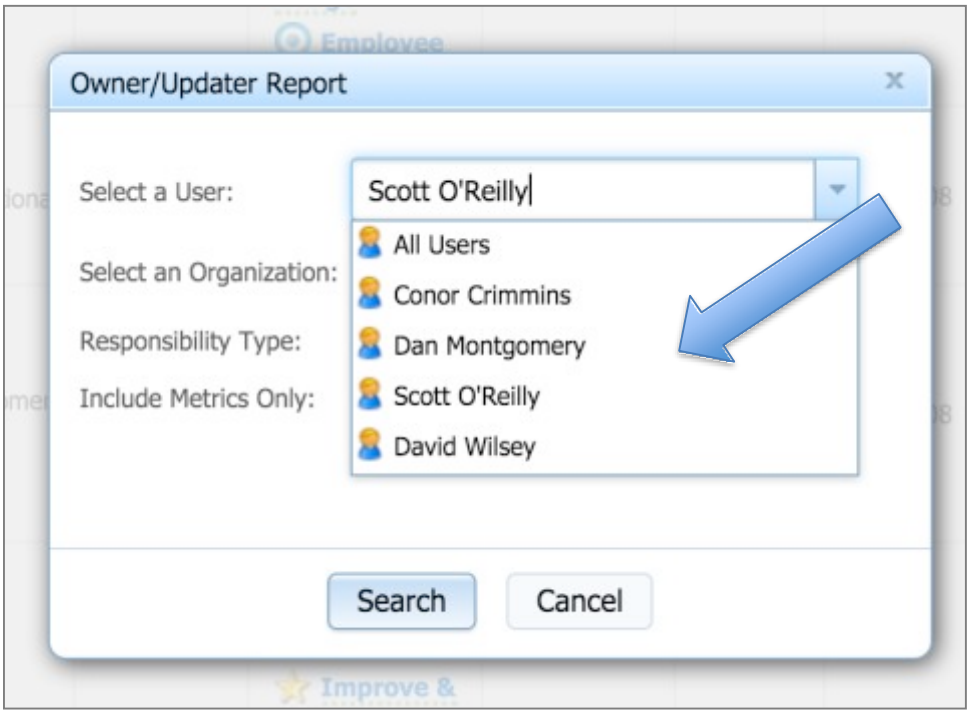

***Figure 11**: The new user selector in the owner/updater report*

History Records for Deleted Users Are More Useful

In the past, when a user was deleted, their audit history records were either deleted or not useful. The software now remembers the names of deleted users and displays them in the history.

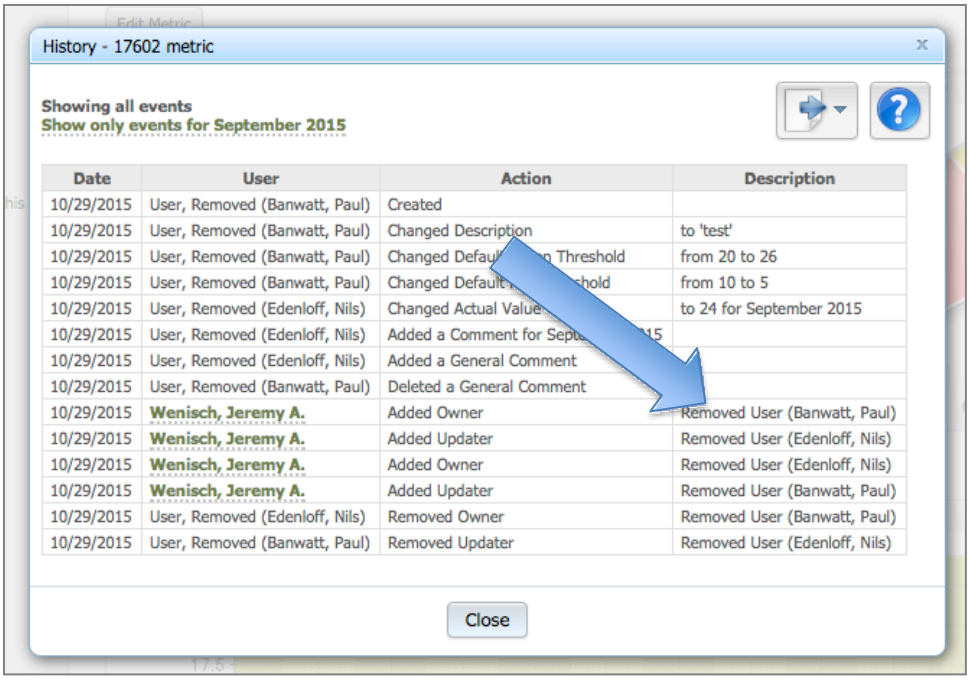

***Figure 12**:Audit records showing deleted users*

Allow Scores to be Used in Metric Equations

Metric scores can now be used in metric equations. The new syntax to reference a score in the current period is:

```
S(node_id)
```

And a score from the previous period is:

```
S(node_id,-1p)
```

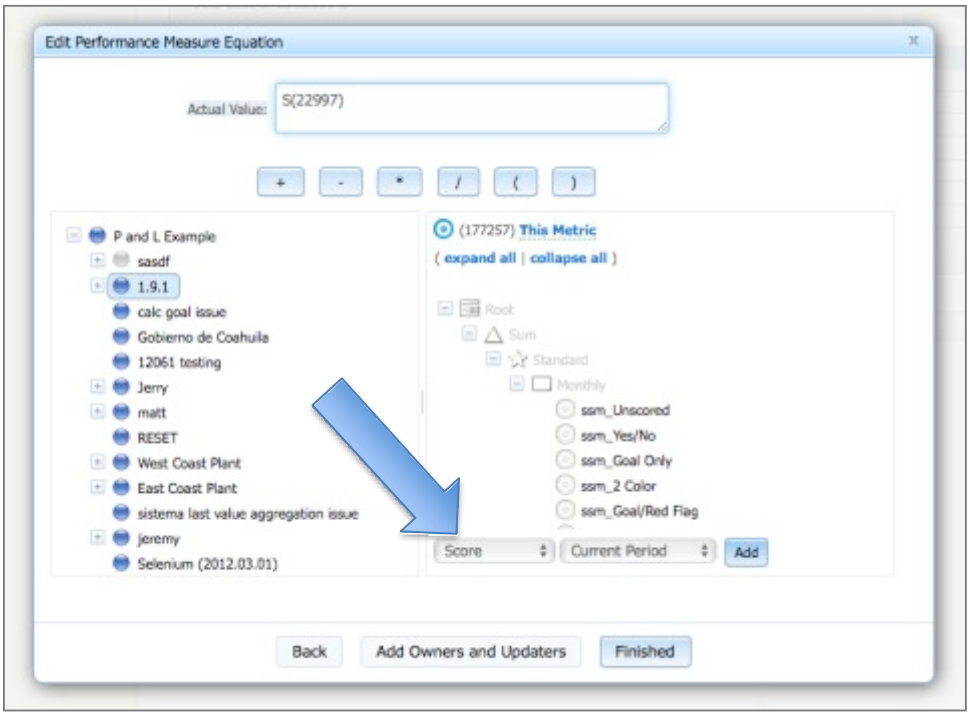

***Figure 13**: Scores in the metric equation builder*

Importing New Types of Data with Connect

Connect is a data import tool that can connect to data sources and use them to import data into the software on a scheduled basis. Connect is now ableto import types of data that haven't been possible in the past.

When importing metric values, there is now an optional "Comment" field. This allows users to import period-specific comments along with their metric values.

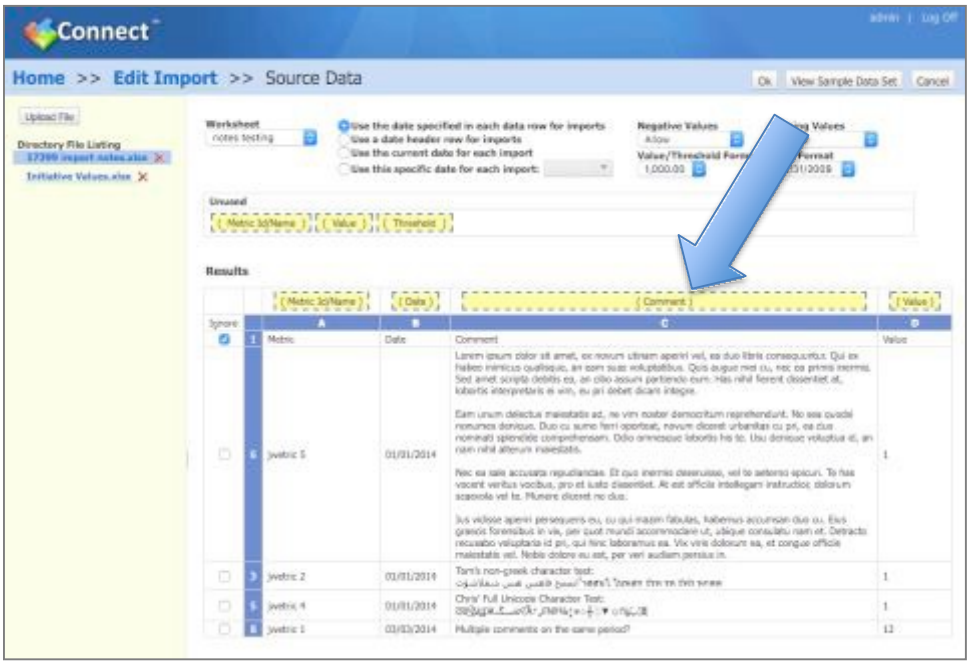

***Figure 14**: The new "Comment" column*

There is also a new “Tags” column when importing scorecard structure. Users can import tags that areseparated by a comma.

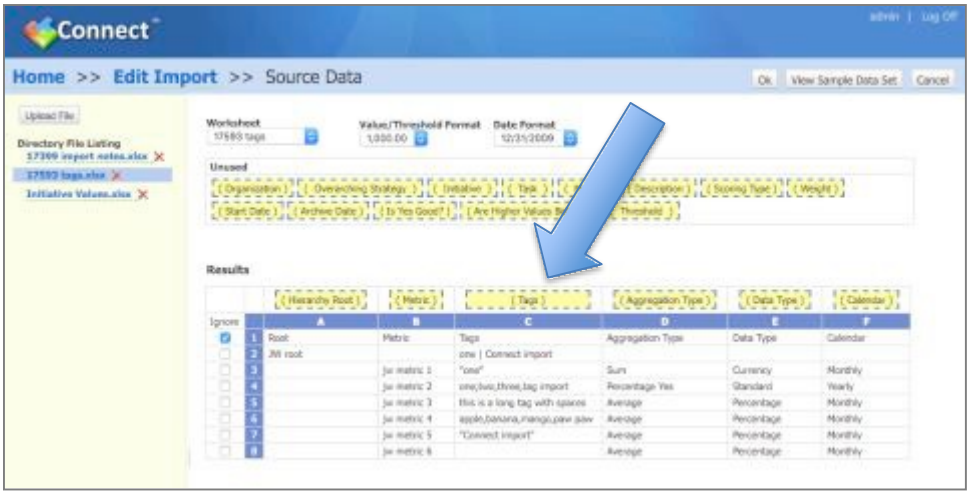

***Figure 15**: The new “Tags” column*

The largest change to Connect is the new “Update Initiative Status” import type.

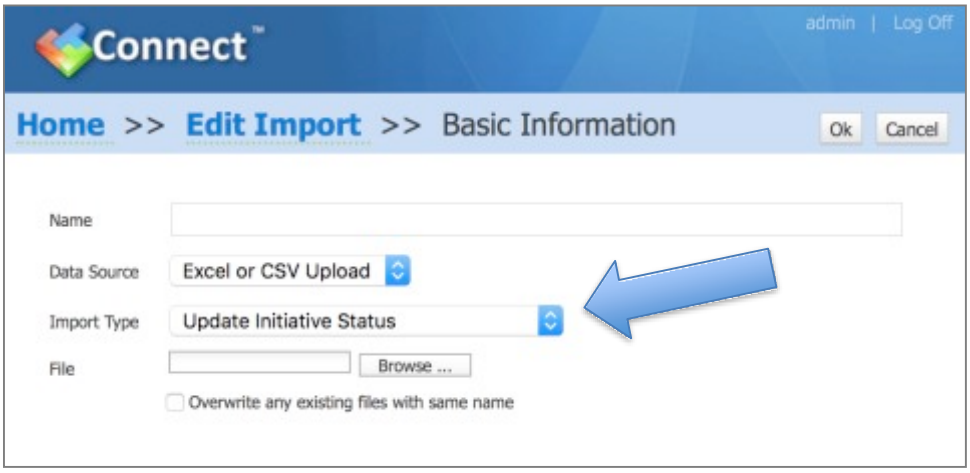

***Figure 16**: The new “Update Initiative Status” import type*

An initiative status updateis very similarto a metric value update. The only difference is that action plan status updates have different columns:

- Initiative Name
- Date
- Percent Complete (optional)
- Actual Cost of Work Performed (optional)
- Comment (optional)

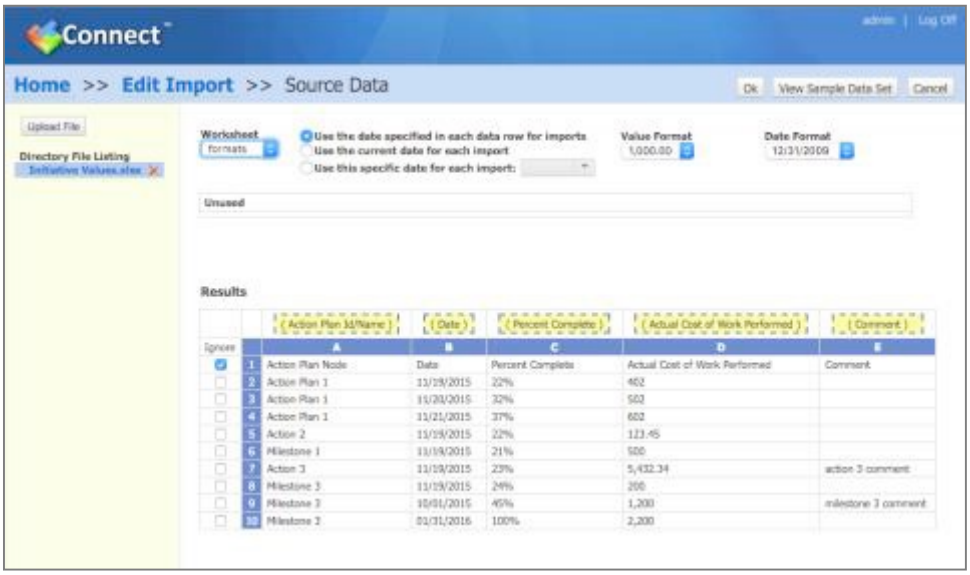

***Figure 17**: An example action plan status import*