Guide to Software Enhancements in Scoreboard/QuickScore Version 2.16

Report Templates

The latest version of the software has the ability to create report templates. This matches the existing template functionality of scorecards and dashboards.

To create a report template, right-click on the source report and select "Copy".
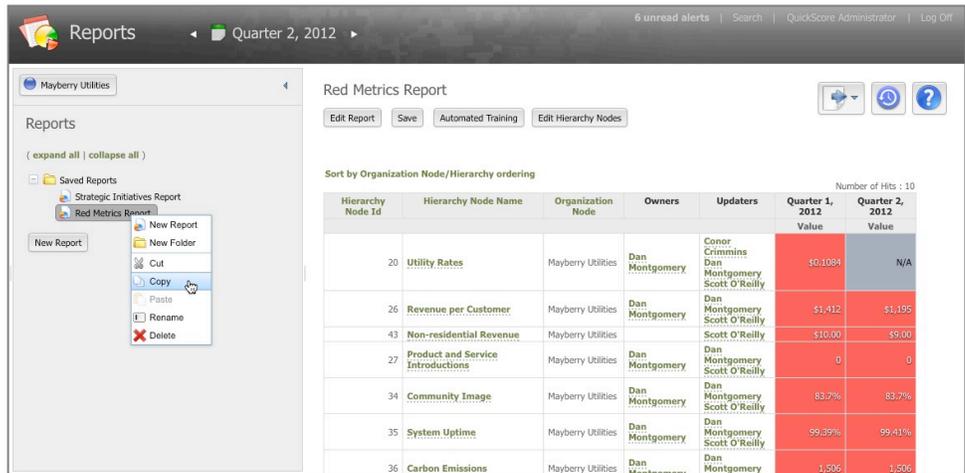
Figure 1: Copying a report

When you paste the report, you now have two choices. You can either create a new, independent copy as before, or you can now link as a template.
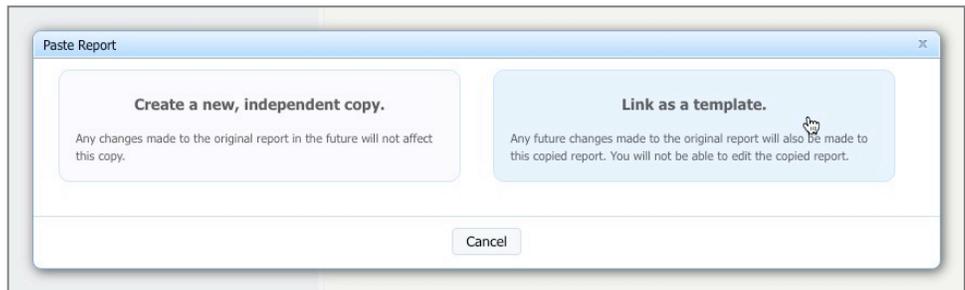
Figure 2: Linking the report as a template

If you choose the template option, you can choose a prefix or suffix for the report name, just like you can with scorecards and dashboards.
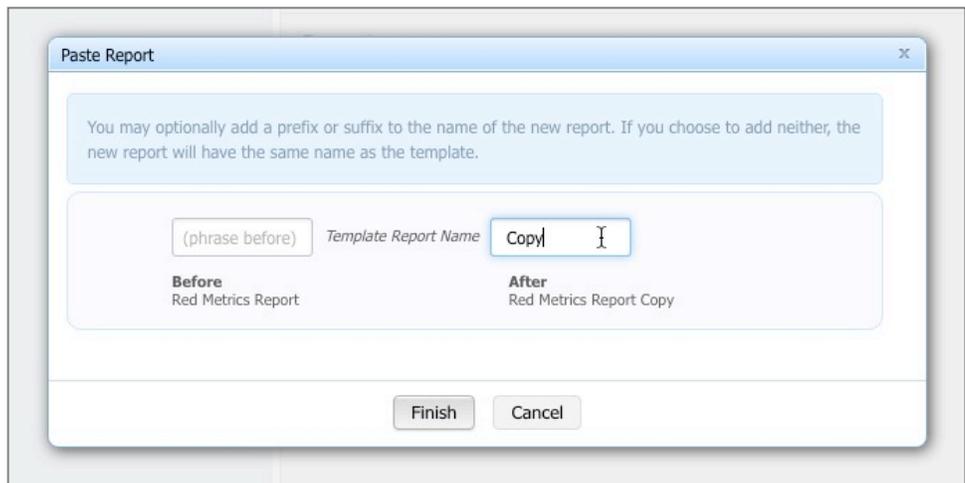
Figure 3: Choosing prefix and suffix

The new templated report also automatically remaps report filters to the scorecard objects in the new organization.

Figure 4*: The new templated report*

Copy and Paste Organizations

There is now the ability to copy and paste organizations in the software. You can choose to copy an individual organization, or an organization and all of its descendant organizations. Equations in calculated metrics are even automatically remapped to the new objects when multiple organizations being copied reference each other.

To get started, just right-click the organization you want to copy and select "copy".
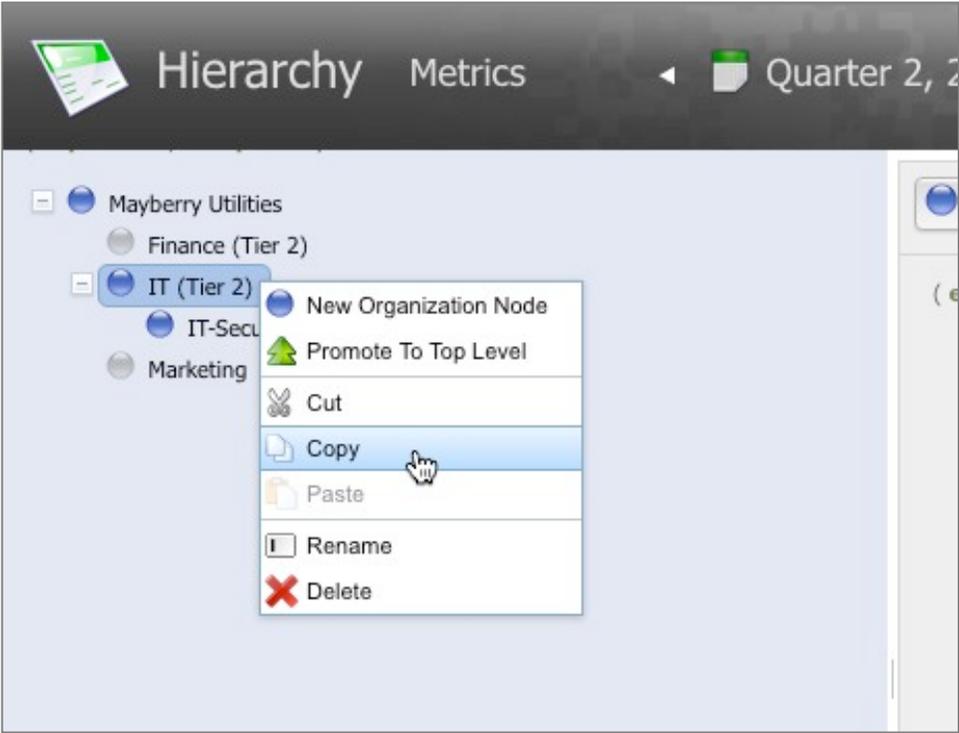
Figure 5*: Copying an organization*

Once you've copied the organization, right-click on the organization that you'd like to paste under and select "paste".
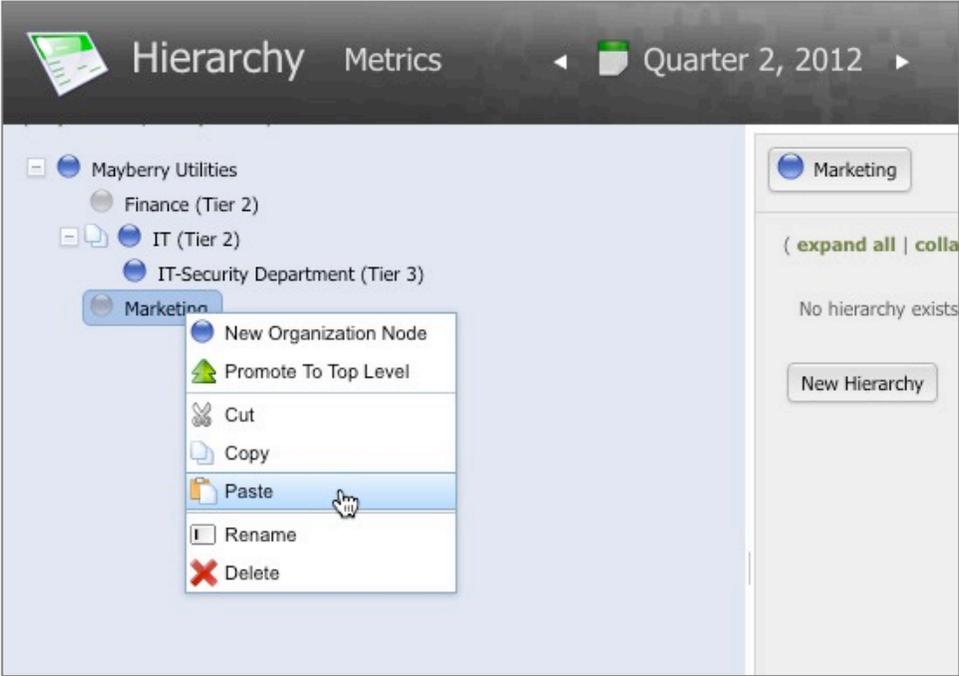
Figure 6: Pasting an organization

This brings up the paste menu. To create a new, independent copy, click on the left option.

If the organization that you have copied has descendant organizations, you can choose to either paste the single organization or the organization and all of its descendants.
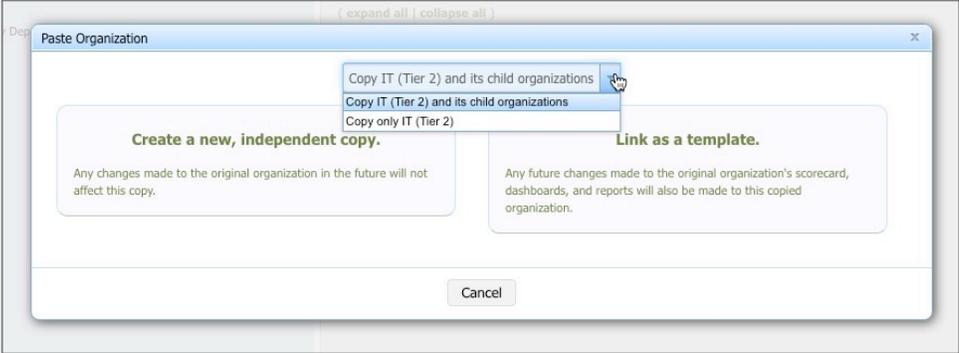
Figure 7: Choosing to include descendants or not

Organization Templates

In addition to being able to copy and paste independent organizations, you can also choose the right option, which creates an entire templated organization.
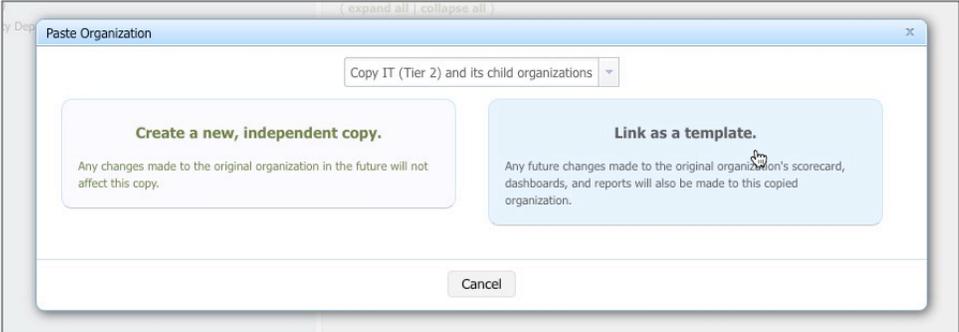
Figure 8: Linking the Organization as a template

This brings up the naming menu where you can choose a prefix and suffix for the Organizations, Scorecards, Dashboards, and Reports.
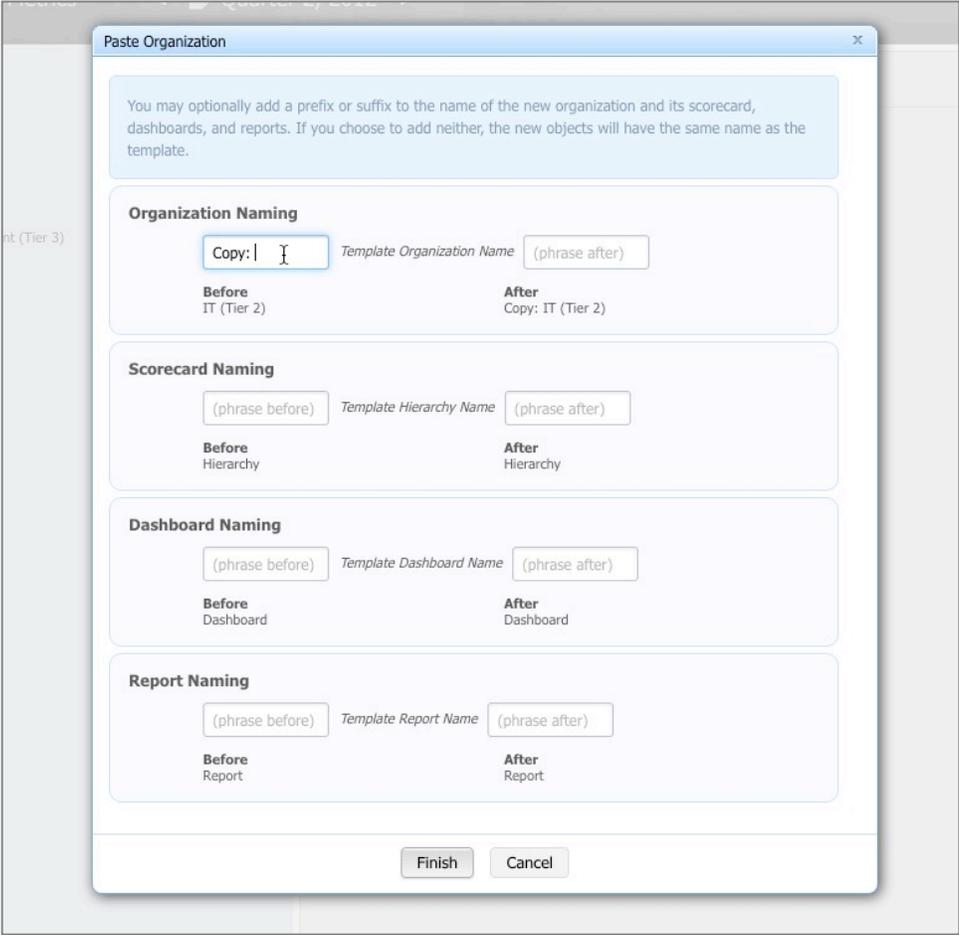
Figure 9: Prefixes and Suffixes for all object types

After the templated organization copies have been created, you can view them in the organization tree just like any other organizations.
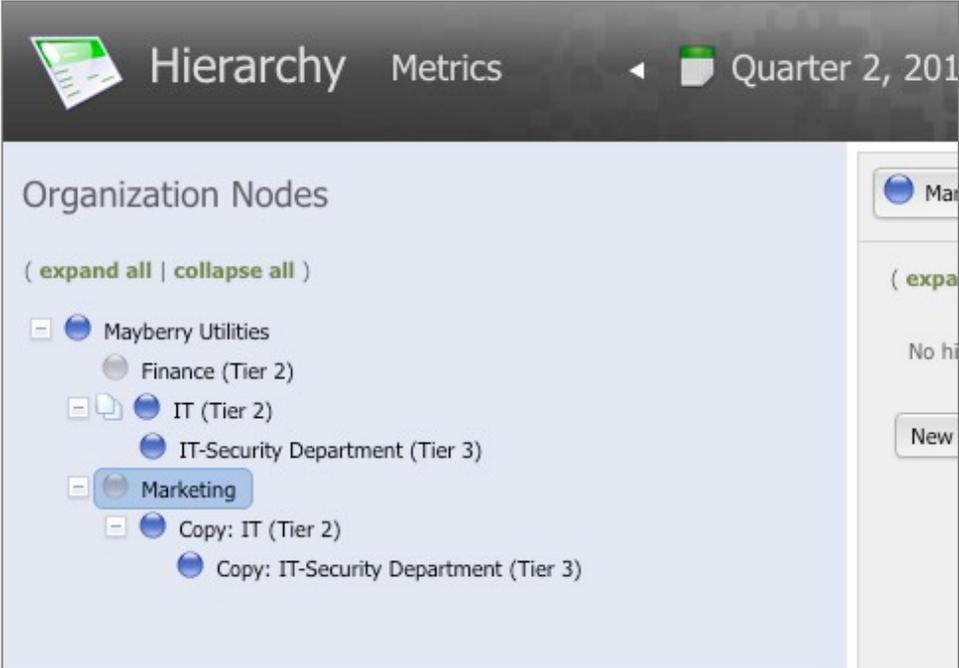
Figure 10: Templated copies of organizations

If you want to delete an organization that has templated copies, there is also now an aggressive delete confirmation box. You must type the word "delete" to delete the organization because of the potentially severe ramifications.
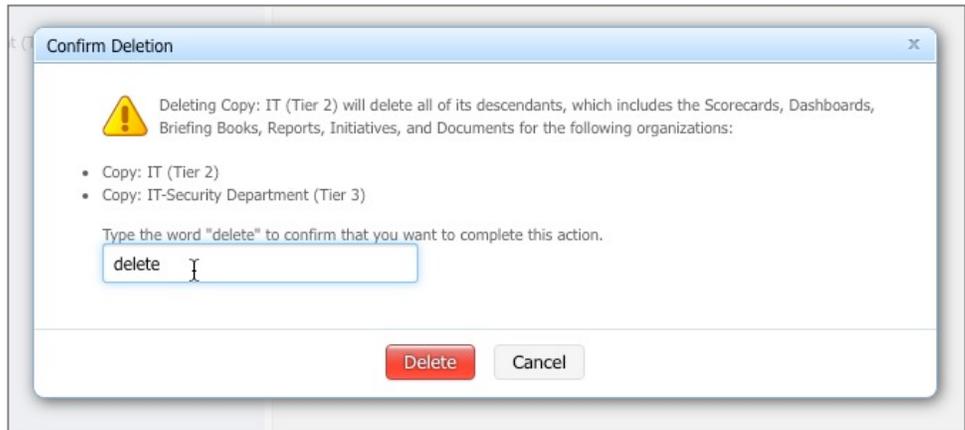
Scorecard Templates Upgraded to Organization Templates

Because there are now organization templates, and because there can only be one scorecard per organization in the software, we have moved all existing scorecard template relationships to the organization level. We have also removed the ability to create new scorecard templates on their own. Scorecard templates must be created at the organization level. Report and Dashboard templates can be created either at the organization level or individually.

We were very careful to make this upgrade process completely transparent to the end user. No existing template/copy relationships were affected, and no new objects were created. Any templated scorecard organizations that had dashboards and reports before the upgrade will continue to have their reports and dashboards operate independently.

Any new reports or dashboards created in templated organizations will be automatically copied to the organization copies. Any reports or dashboards that existed before the upgrade process will not be automatically copied to the copy organizations. If you have an organization that became templated as part of the upgrade process, and it has dashboards or reports that you'd like to copy to the organization copies, there is a way to do that manually. Just copy and paste the report or dashboard from the source organization into the same source organization. This will create a new copy of the report or dashboard, which will then be copied to the copy organizations.

The result of these changes is that all existing scorecard relationships will continue to behave exactly as before, but newly created objects will take advantage of the new templated organization functionality.

Ability to Automatically Aggregate Metrics Across Organizations

There is a new aggregation type for metrics called "Rollup". This automatically sums metrics from children organizations that are based on the same organization templates.

To set up these automated rollup metrics, first create an organization to be used as a template. Any metrics that you want to be automatically calculated should have the update type of Rollup. Then create templated copies of that organization in a tree structure. Finally, update the metrics in the organizations at the bottom of the organization tree. The metrics in the organizations higher up the tree will automatically have calculated values based on the metrics in lower organizations.
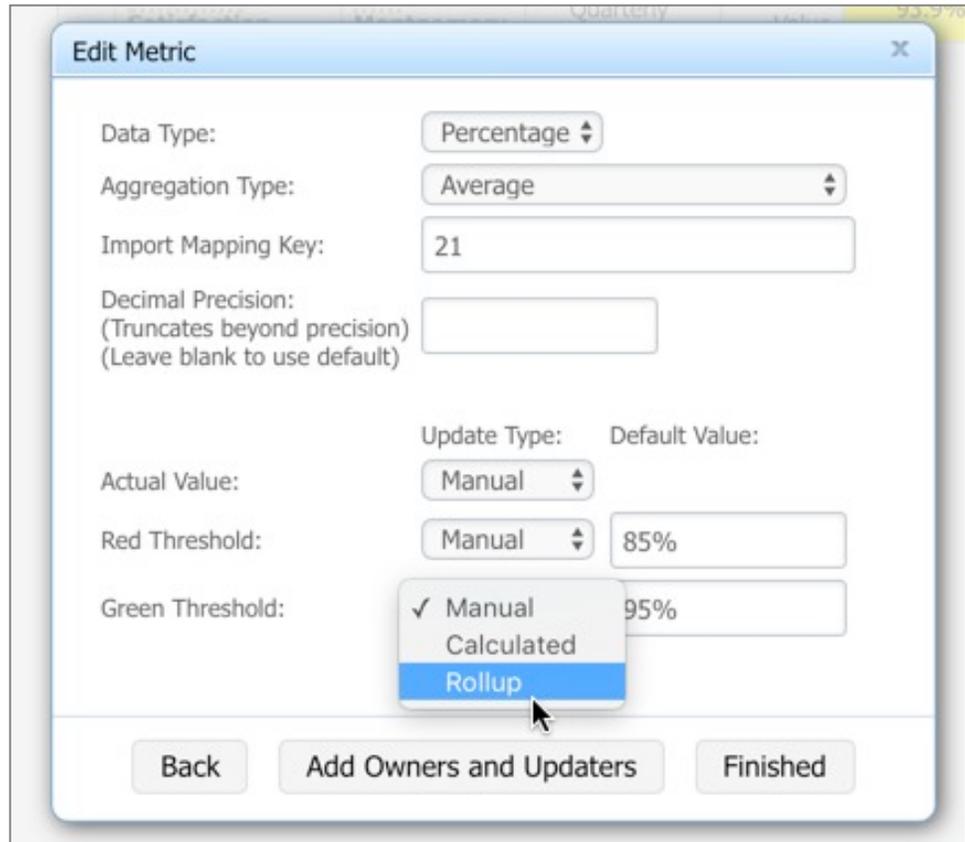
Figure 12: The new Rollup update type

Metric Comparison Report

The latest version of the software has a brand new version of the metric comparison report. As before, you can compare similar metrics across organizations. With the new version of the report you can also choose which metrics you would like to compare.

To start building a metric comparison report, select "Metric Comparison" from the new report menu.
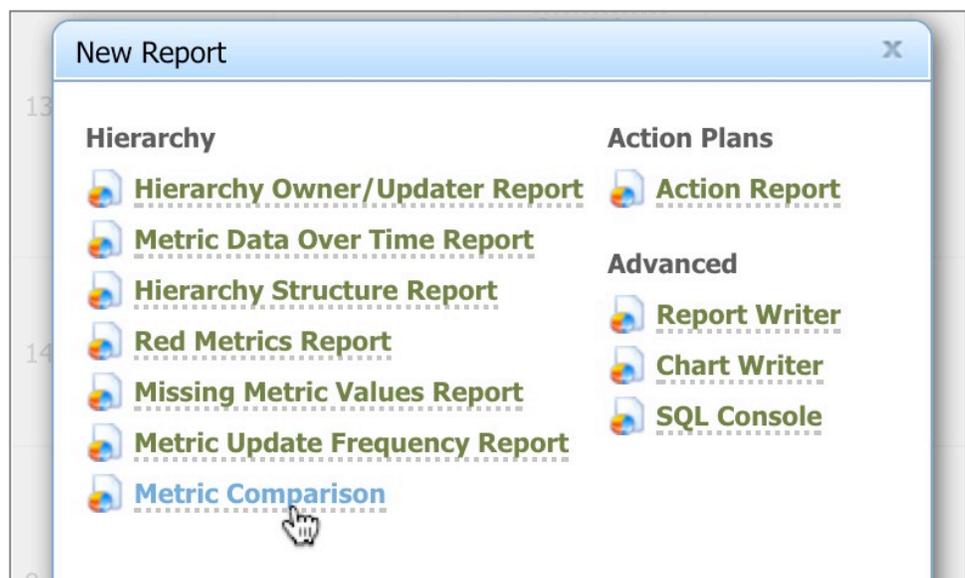
Figure 13: The metric comparison report

The next step is to choose which organizations you want by selecting them from the organization tree on the left.

By default, only the organizations you click on will be shown in the report, but you can also choose the following options for an organization you select:

- This organization
- Only children
- Only Descendants
- This organization and its children
- This organization and its descendants.

Descendants mean any organization under the selected organization. Children mean only the organizations one level below the selected organization.

Figure 14: Choosing organizations

The second step is to choose which metrics you want to see in the report. You can either choose metrics individually, or you can choose a scorecard object higher up the tree and automatically include all metrics underneath it.

The sub-metrics checkbox allows you to also include metrics underneath other metrics.
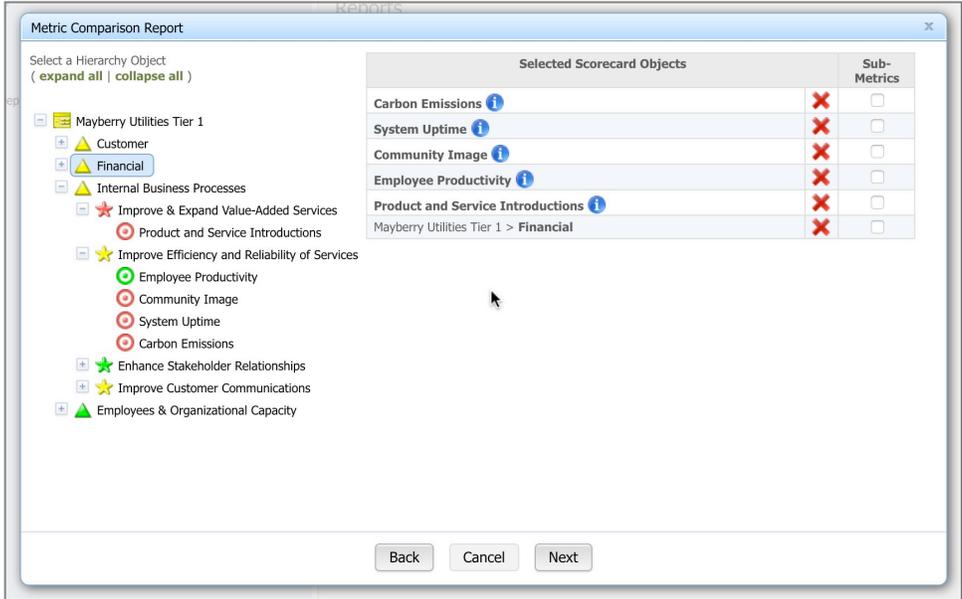
Figure 15: Choosing metrics

The last step is to choose report options. You need to choose which calendar period to show the results for, and there are also several checkboxes on the bottom. These allow you to show the calendar column, the goal column, and to invert the axes.
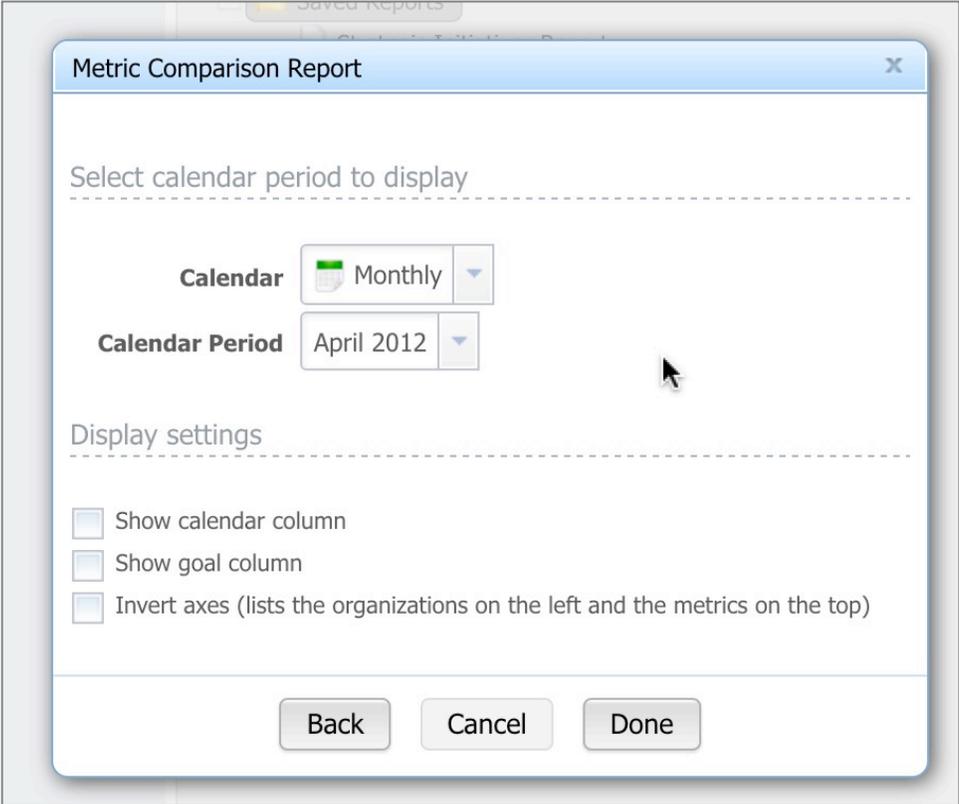
Figure 16: Report options

By default the metric comparison report lists the metrics vertically and the organizations horizontally.
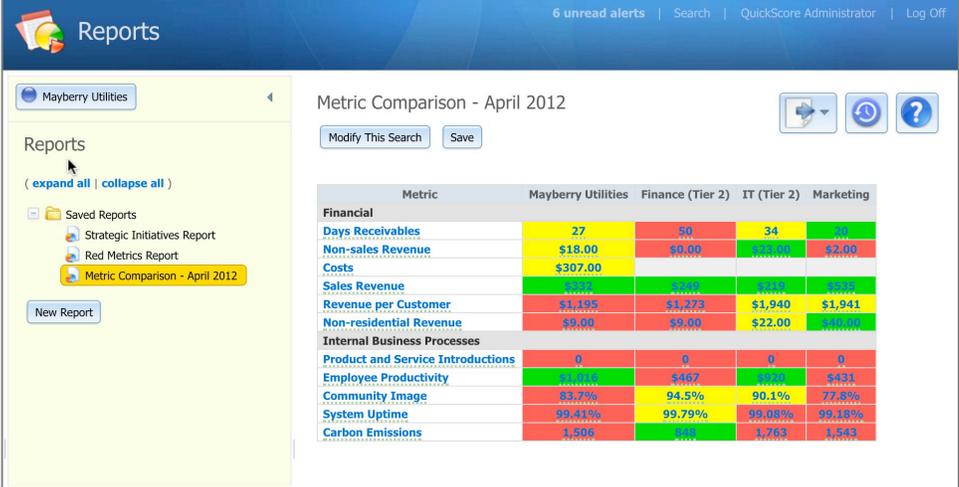
Figure 17: Report results

If "invert axes" were chosen earlier, it would list the organizations vertically and the metrics horizontally.

Figure 18: Report results with inverted axes

Mass-edit for How to Treat Missing Metric Values in Equations

For quite a while the report writer has had the ability to edit many scorecard objects at once. One of the new things it can edit, however, is the way to treat missing values in equations.
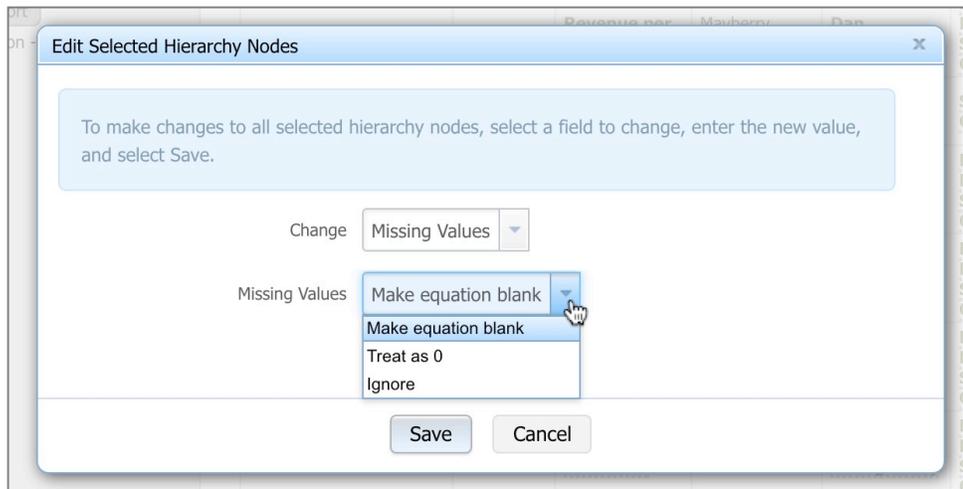
Figure 19: Mass-edit for equation missing values

Easier to Identify Dashboard Images

When a dashboard is in edit mode, you can now hover over an image to see what its name is. This is very helpful when determining what images a dashboard is using.
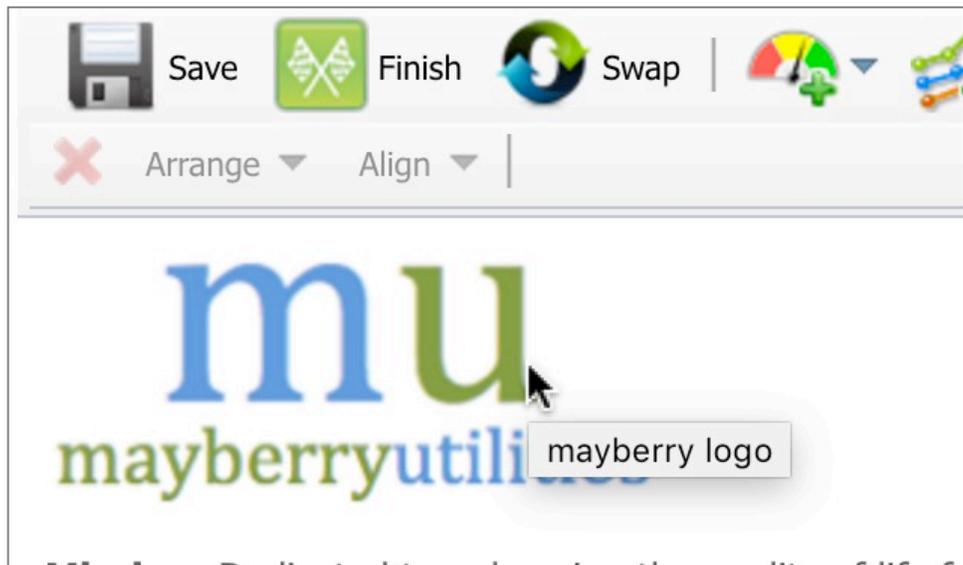
Figure 20: Showing the image name on mouseover

Scorecard Owner/Updater Report Defaults to Not Metrics Only

When creating a new Scorecard Owner/Updater report, the "include metrics only" option is now unchecked by default.
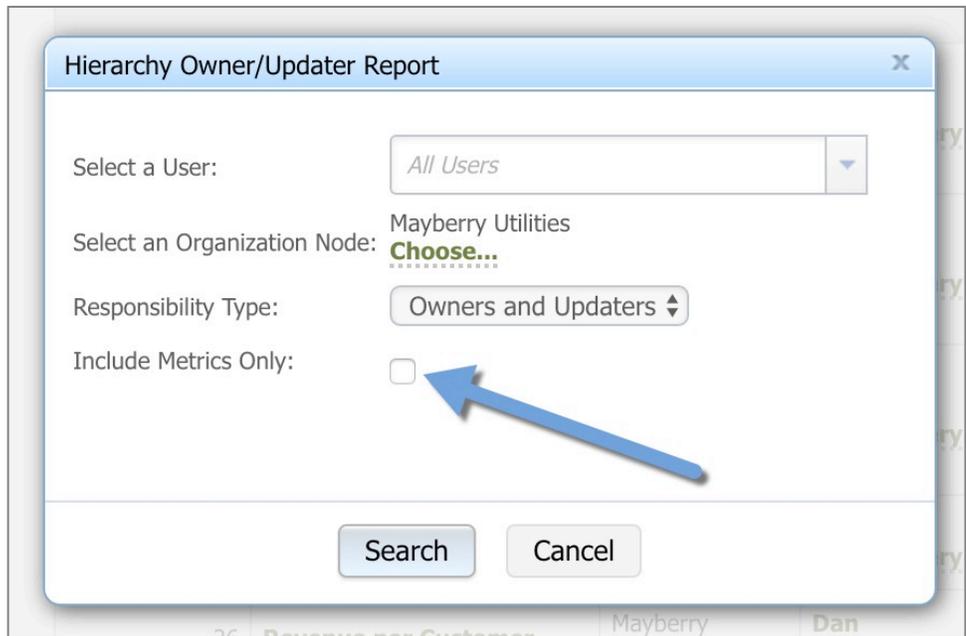
Figure 22: Metrics only defaults to off