

# Verint Financial Compliance Capture (Verba)

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# Quality Management Guide

## Overview

This guide is for contact center supervisors who manage [quality assurance projects](#), [design evaluation forms](#) or [evaluate and score interactions](#).

Verba Performance and Quality Management system provides an easy-to-use and flexible solution for developing quality management system in a contact center. A key part of this framework is the agent scoring component.

## Quality Management Process

You can use Verba to improve the quality of your contact center in 4 steps:

1. **Establish quality management criteria** - You can do this by [designing your evaluation forms](#)
2. **Identify the scope of your quality management work** - In Verba, this is achieved by [setting up evaluation projects](#)
3. **Evaluate interactions** - This is an ongoing work, where you are [evaluating and scoring interactions](#)
4. **Follow results** - You can use [reporting and dashboards](#) to follow quality assurance progress

## Features

### Easy-to-use evaluation forms

- Intuitive, user friendly, web based interface with drag & drop features
- Entirely integrated into the Verba Recording System framework
- Multiple question types with appearance control (radio, listbox, etc.)
- Weighting (sections, questions)
- Skill assignment feature for questions to provide an additional layer of evaluation
- Form auto fail options for each question
- Default value settings
- 30+ configurable form and call detail fields displayed on the scorecard

### Flexible selection of interactions for evaluation and scoring

- Project based framework
- Option for group/agent based call selection
- Mathematically and statistically correct random selection
- Configurable access control for supervisors
- Score classification settings
- Interactions for scoring are automatically presented for the supervisors in the project
- Integrated Verba Player with all the features including enhanced playback controls, markers, etc.
- Support for sharing and discussing scorecard information with agents
- Supervisor calibration

## Table of contents

### Designing evaluation forms

Contact center supervisors can design various evaluation forms for consistent scoring of agent interactions.

- [Evaluation form list](#)
- [Evaluation form details](#)
- [Using the form designer](#)
- [Skill list](#)
- [Skill details](#)

### Setting up evaluation projects

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Agent scoring happens in evaluation projects, defined by a set of calls and an evaluation form used by the supervisors for scoring.

- Evaluation project list
- Creating an evaluation project

## Evaluating and scoring interactions

This topic describes how the actual evaluation project is executed by supervisors.

- Find and list calls for evaluation
- Scoring
- Calibrating evaluations

## Reporting and Dashboards

### Screen capturing

#### License requirements

In order to use the capabilities described in this guide, the user add-on called **Verba Add-on QM License** is required for all analyzed users (typically the contact center agents monitored by your supervisors).

## Designing evaluation forms

Contact center supervisors can design various evaluation forms for consistent scoring of agent interactions. In order to setup an evaluation project, at least one evaluation form has to be defined.

The solution is shipped with a default evaluation form, which consist of a general set of questions providing a good starting point for designing your quality assurance process.

- [Evaluation form list](#)
- [Evaluation form details](#)
- [Using the form designer](#)
- [Skill list](#)
- [Skill details](#)

## Evaluation form list

Form administration is available only for the quality management administrators by selecting the **Quality Management/ Forms** submenu.

### Find and list forms

You can use the input fields above the columns in the list to filter the list for a given search term.

To select a form for editing, just click on the desired row.

**Find and List Evaluation Forms** [Add New Form](#)  
[Hide Deactivated Forms](#)

1 item found, displaying all items. Page(s): 1

Evaluation Form	Projects
Default scorecard	<a href="#">Project</a>

1 item found, displaying all items. Page(s): 1

Export options: [Excel](#) | [CSV](#) | [PDF](#)

## Evaluation form details

Form administration is available only for the quality management administrators by selecting the **Quality Management/ Forms** submenu.

### Creating a form

You can create a new form by clicking on the **Add New Form** link on the **Quality Management/ Forms** page. You can also create a form by copying an existing form, simply select an existing form and press the **Copy** button. After selecting the link or pressing the **Copy** button, the following page is opened.

The following table describes the available fields:

Field Name	Description	Requirements
Form Name	Name of the form.	Required field. Minimum length: 3 Maximum length: 64 Must be unique in the system.
Description	Optional description of the form.	Maximum length: 256
Valid From	Start date of the validation for the form.  The validation interval of the form defines the date range, when the form can be selected for an evaluation project.	Required field.
Valid To	End date of the validation for the form.  You can deactivate the form with the current date and time by pressing the <b>Deactivate</b> button at the bottom of the page also.  If you want to reactivate an inactive form, press the <b>Activate</b> button at the bottom of the page.	-

After completing the form, press the **Save** button to save form data into the database. In order to save the form, you must configure at least one question in the form designer. For more information, see [Using the form designer](#).

### Form details

The form details section displays important information about the evaluation on the scorecards. You can access the configuration by selecting the desired form and clicking on the **Form Details** tab.

Form Configuration

[Clear Form](#)  
[Back to Previous Form List](#)

Form Data
Form Designer
Form Details
Call Details

**▼ Form Details**

Form name	<form_name>	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>
Evaluation Time/Duration	<evaluation_time_per_duration>	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>
Available points	170	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>
Score	<score>	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>
Classification	<range>	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>
Evaluator name	<evaluator_name>	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>
Evaluation date	<evaluation_date>	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>
Agent	<agent>*	<span style="font-size: 0.8em;">↑ ↓ 🗑</span>

+

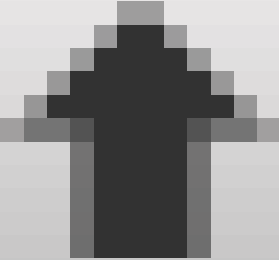
Save
Copy
Delete

Creation Date: Jan 31, 2011 7:04:42 AM  
 Created By: Verba Administrator (Administrator)  
 Last Modification Date:  
 Last Modified By:  
[View Change History](#)

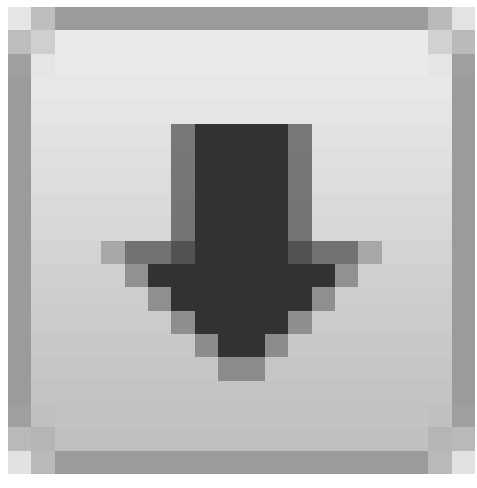
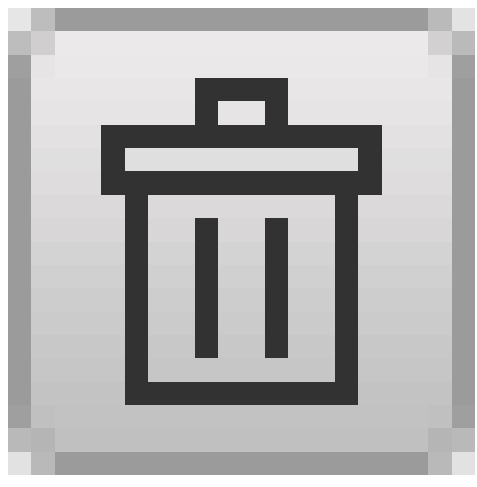
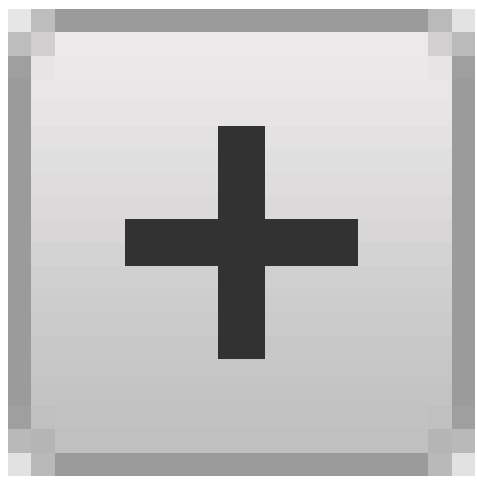
\*Indicates required item.

Each row on the screen represents a form detail field. You can select a field from the available list of fields. You can also change the order of the fields and you have the ability to configure custom fields, which can be filled out by the supervisor during the evaluation.

The following table summarizes the available actions for a field placed into the form:

Icon	Action	Description
	Move field up	Moves the field up by one field position.



	Move field down	Moves the field down by one field position.
	Delete field	Deletes the field.
	Add new field	Adds a new field.

The form details configuration can be saved along with other form parameters by pressing the **Save** button.

### Call details

The call details section of a form displays important information about the call on the scorecards. You can access the configuration by selecting the desired form and clicking on the **Call Details** tab.

Form Configuration

[Clear Form](#)  
[Back to Previous Form List](#)

Form Data
Form Designer
Form Details
Call Details


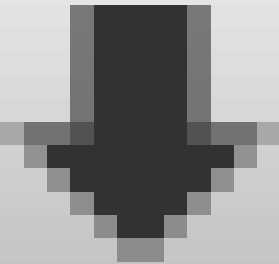
**Call Details**

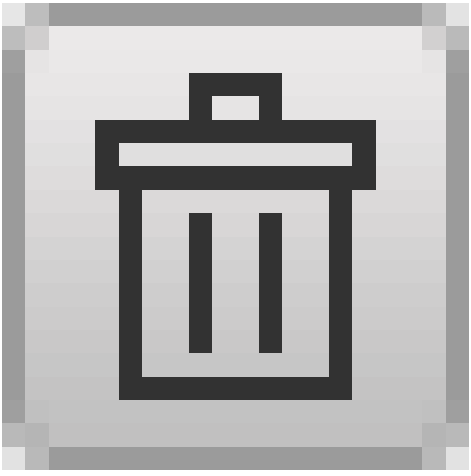
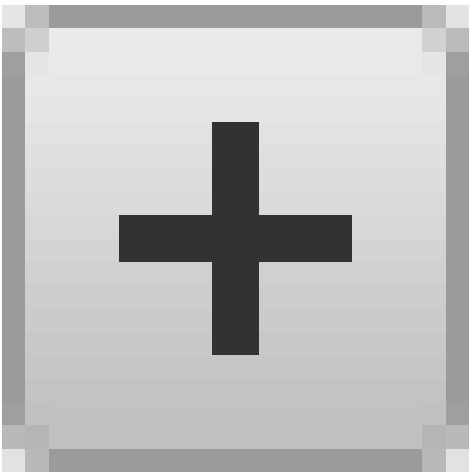
<input type="text" value="Call Start"/>	<input type="text" value="&lt;Call Start&gt;"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑️"/>
<input type="text" value="System Caller Party Name"/>	<input type="text" value="&lt;System Caller Party Name&gt;"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑️"/>
<input type="text" value="System Called Party Name"/>	<input type="text" value="&lt;System Called Party Name&gt;"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑️"/>
<input type="text" value="Caller Party Phone Number"/>	<input type="text" value="&lt;Caller Party Phone Number&gt;"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑️"/>
<input type="text" value="Called Party Phone Number"/>	<input type="text" value="&lt;Called Party Phone Number&gt;"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑️"/>
<input type="text" value="EID"/>	<input type="text" value="&lt;EID&gt;"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="🗑️"/>
<input type="button" value="+"/>		

Creation Date: Jan 31, 2011 7:04:42 AM  
 Created By: Verba Administrator (Administrator)  
 Last Modification Date:  
 Last Modified By:  
[View Change History](#)

Each row on the screen represents a call detail field. You can select a field from the available list of fields. You can also change the order of the fields and you have the ability to configure custom fields, which can be filled out by the supervisor during the evaluation.

The following table summarizes the available actions for a field placed into the form:

Icon	Action	Description
	Move field up	Moves the field up by one field position.
	Move field down	Moves the field down by one field position.

	Delete field	Deletes the field.
	Add new field	Adds a new field.

The call details configuration can be saved along with other form parameters by pressing the **Save** button.

## Modifying and deleting forms

To edit form data, you have to click on the desired row of the table showing configured forms. After clicking on the row, a new page opens automatically.

To have changes take effect, push the **Save** button. All conditions, which are described in the previous parts, have to be met. You can freely modify the name and description parameters of the form any time, but you have to be aware, that the changes will effect all associations for the given form e.g. changing the name of the form, will be also reflected in the reports and data associated with the form, will be displayed under the new name. None of the other settings of a form, including the form design, the form and call detail fields configuration, can be changed after the form is selected in an evaluation project.

You can delete the form by pressing the **Delete** button. Deletion of a form is only enabled if no evaluation project is associated with the form. Once a form is set for an evaluation project, the form cannot be deleted.

## Using the form designer

The system offers a very convenient, drag & drop based user interface to quickly and easily design and create evaluation forms. In order to access the form designer interface, select the desired form first and click on the **Form Designer** tab.

The screenshot shows the 'Form Configuration' interface with the 'Form Designer' tab selected. The interface displays a list of evaluation questions organized into sections. Each question includes a color-coded icon, the question text, radio button options (Yes, No, N/A), a score, and a percentage. Each row also has a set of control icons for editing, deleting, and moving the question.

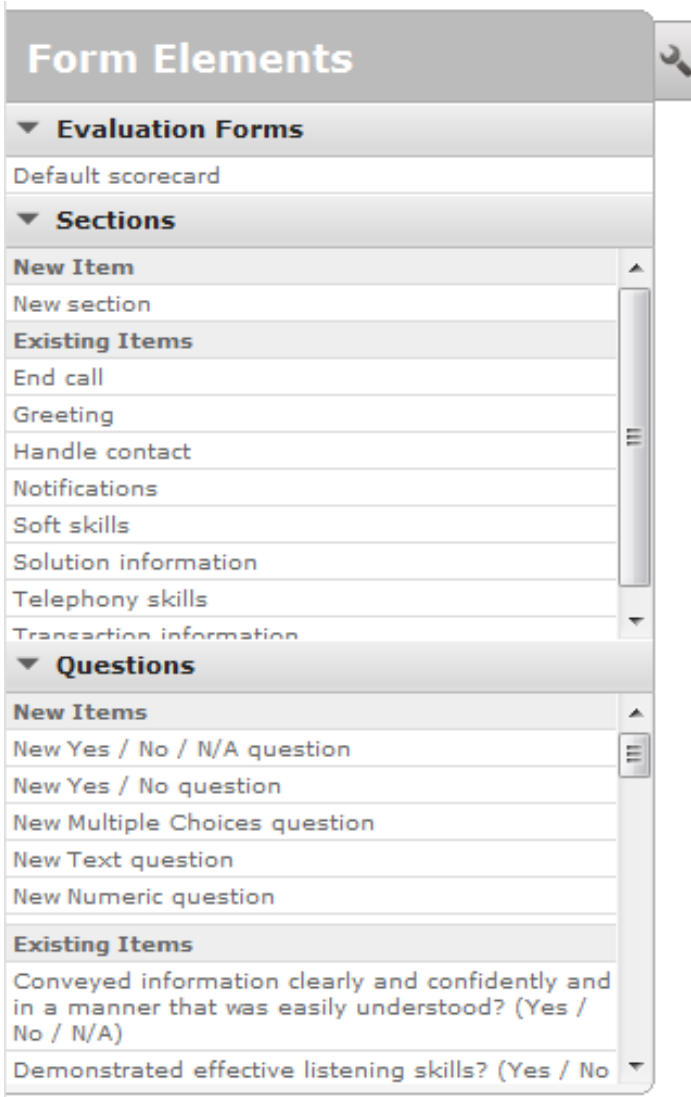
Form Configuration		Clear Form Back to Previous Form List	
Form Data	Form Designer	Form Details	Call Details
<b>Total score</b>		<b>170</b>	
<b>▼ Greeting</b>		<b>25 (15%)</b>	[↑] [↓] [⚙️] [🗑️]
<span style="color: red;">■</span>	Did the agent say thank you for calling or apply a local greeting?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: red;">■</span>	Did the agent mention the company name?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: red;">■</span>	Did the agent mention his/ her name?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: blue;">■</span>	Did the agent offer assistance to the caller?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: red;">■</span>	If the call was transferred did the agent adapt the greeting accordingly?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<b>▼ Handle contact</b>		<b>20 (12%)</b>	[↑] [↓] [⚙️] [🗑️]
<span style="color: blue;">■</span>	Did the agent ask for / confirm the caller's name?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: green;">■</span>	Did the agent ask for/ confirm the caller's company Name?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: green;">■</span>	Did the agent ask for / confirm the caller's telephone number?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: green;">■</span>	Did the agent ask for/ confirm the customer's account number?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<b>▼ Transaction information</b>		<b>30 (18%)</b>	[↑] [↓] [⚙️] [🗑️]
<span style="color: blue;">■</span>	Maintained a courteous, pleasant, and respectful tone throughout the call?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: green;">■</span>	Conveyed information clearly and confidently and in a manner that was ex	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: brown;">■</span>	Demonstrated effective listening skills?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: blue;">■</span>	Expressed empathy and concern as appropriate?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: green;">■</span>	Efficiently managed time and call flow (call management)?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]
<span style="color: purple;">■</span>	Demonstrated professionalism (call etiquette)?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	5 (3%) [↑] [↓] [⚙️] [🗑️]

Each form consists of a set of sections containing the questions. A form section is a structural element of the form, which helps to organize the form questions. Usually, a form section contains questions related to the same field/topic.

The form designer configuration can be saved along with other form parameters by pressing the **Save** button.

### Form elements panel

A key component of the form designer interface is the **Form Elements** panel on the left side of the window. The toolbar panel contains a list of building blocks available to design an evaluation form. It displays new elements and already defined/added ones as well. In order to add an element to the form, simply drag it in the elements panel and drop it in an empty section or question holder position. While dragging an element, the system automatically displays the available section or question positions if you move the cursor over the form. Once a section or question is placed, it can be configured further.



The tool icon on the upper right side of the panel can be used to control the 3-state appearance of the panel.

### Section configuration

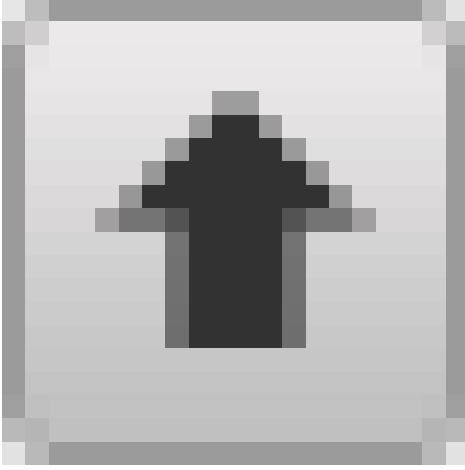
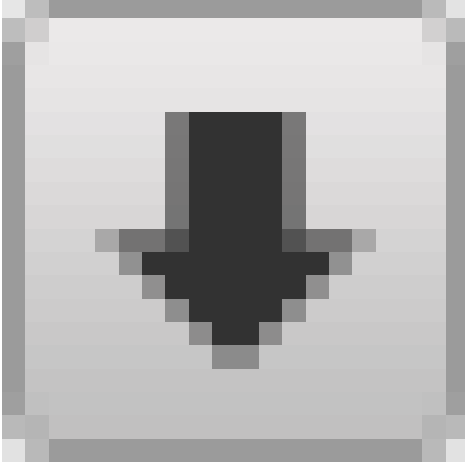
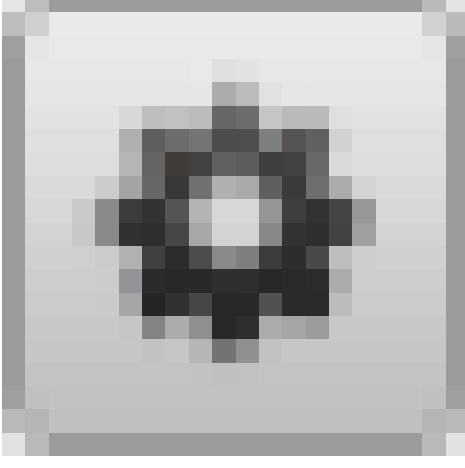
You can add a new section by dragging an existing or a new item from the form elements panel and dropping it to an available section holder position.

The name of the section can be edited directly in the form designer, just click on the label and edit it.

The following table summarizes the available actions for a section placed into the form:

Icon	Action	Description
------	--------	-------------

---

 A square button with a light gray background and a darker gray border. In the center is a black upward-pointing arrow.	Move section up	Moves the section up by one section position.
 A square button with a light gray background and a darker gray border. In the center is a black downward-pointing arrow.	Move section down	Moves the section down by one section position.
 A square button with a light gray background and a darker gray border. In the center is a black gear icon.	Configure section	Opens the section configuration window.

---

	Delete section	Deletes the entire section including all questions under it.
---	----------------	--

Form section parameters can be edited by clicking on the **Configure** icon. The following table describes the available configuration options:

Field Name	Description	Requirements
Title	Title of the section.	Required field. Minimum length: 3 Maximum length: 512
Weight	Weight of the section. This numerical value is used to change the weight of the questions for the entire section. If the weight of a section is greater than 1, the question scores for the section are multiplied by the weight value.	Required field. Minimum value: 1 Maximum value: 32767 Only positive integers can be defined.

After filling out the form, press the **Ok** button to apply the changes for the section. It does NOT save the changes to the database, you have to press the **Save** button on the form designer to store the configuration values into the database.

## Question configuration

You can add a new question by dragging an existing or a new item from the form elements panel and dropping it to an available question holder position. The system supports different type of questions, which are listed as different items. The following question types are available in the system:

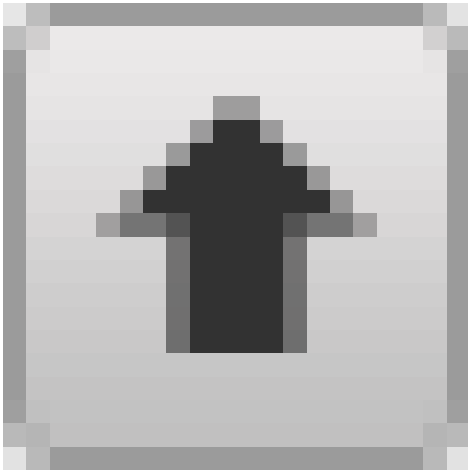
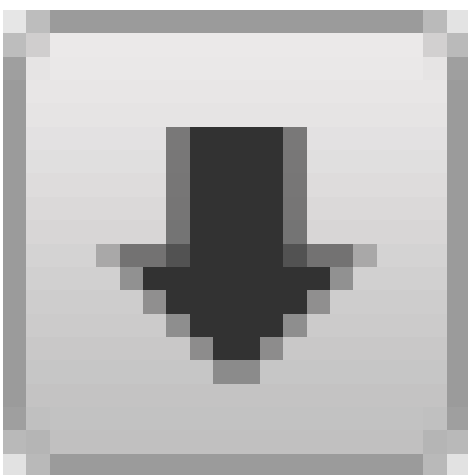
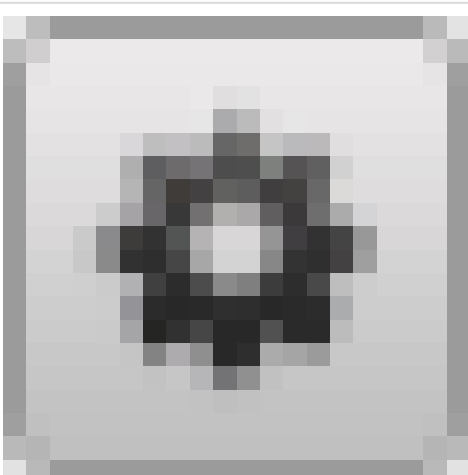
Question Type	Description
Yes / No / N/A	It is a built-in multiple choice type of question. You can assign scores for the Yes / No values.
Yes / No	It is a built-in multiple choice type of question. You can assign scores for the Yes / No values.
Multiple Choice	You can freely configure the available options and the corresponding scores for the items.
Text	A text based question type. There is no score associated with it. Usually, it can be used to provide free text answers or provide comments to the agents.
Numeric	A direct score value can be entered in this type of questions.

The name of the question can be edited directly in the form designer, just click on the label and edit it.

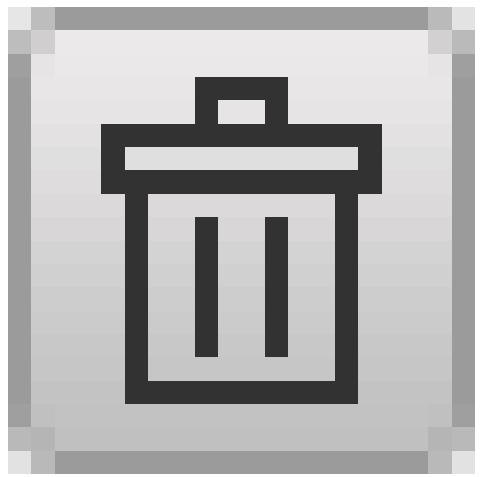
The following table summarizes the available actions for a question placed into the form:

Icon	Action	Description
------	--------	-------------

---

 A square button with a light gray background and a darker gray border. In the center is a black upward-pointing arrow.	<p>Move question up</p>	<p>Moves the question up by one question position.</p>
 A square button with a light gray background and a darker gray border. In the center is a black downward-pointing arrow.	<p>Move question down</p>	<p>Moves the question down by one question position.</p>
 A square button with a light gray background and a darker gray border. In the center is a black gear icon.	<p>Configure question</p>	<p>Opens the question configuration window.</p>



	Delete question	Deletes the question.
---	-----------------	-----------------------

Form question parameters can be edited by clicking on the **Configure** icon. The following table describes the available configuration options:

Field Name	Description	Requirements
Title	Title of the section.	Required field. Minimum length: 3 Maximum length: 512
Type	Type of the question. This setting is not modifiable. If you want to change the type of the question, you have to delete it first and drag & drop another question with the desired type.	-
Mandatory	Sets whether filling the text box is mandatory or not.	-
Appearance	You can choose the display type of the available answers for the question: <ul style="list-style-type: none"> <li>■ Radio buttons</li> <li>■ Dropdown box</li> </ul>	-
Skill	You can select the skill for the question. The color of the selected skill is displayed in front of the question. For further information about the skills, see <a href="#">Skill administration</a> .	-
Available points	Defines the maximum score value for the question. This field is only editable for the Numeric type of questions. For other question types, this value is automatically calculated based on the scores defined for the answers.	Required field. Minimum value: 0 Maximum value: 32767 Only positive integers can be defined.
Auto fail	This option lets you define a score value for the question, which triggers the failure of the given section or the entire scorecard if the defined score value is not achieved. When the auto failure is activated it modifies all score values to zero in the given section or on the entire form. This auto fail score value cannot be greater than the available maximum score for the question.	-

Weight	Weight of the question. This numerical value is used to change the weight of the question. If the weight of a question is greater than 1, the question score is multiplied by the weight value.	Required field. Minimum value: 1 Maximum value: 32767 Only positive integers can be defined.
Default	You can choose, which answer should be selected by default when the form is presented to the supervisors.	-
Label	Defines the label for the given answer option for multiple choice type of questions including the built-in ones.	Required field. Minimum length: 3 Maximum length: 64
Point	Defines the score value for the given answer option for multiple choice type of questions including the built-in ones.	Required field. Minimum value: 1 Maximum value: 32767 Only positive integers can be defined.

After filling out the form, press the **Ok** button to apply the changes for the question. It does NOT save the changes to the database, you have to press the **Save** button on the form designer to store the configuration values into the database.

## Skill list

Skills in the Verba Performance and Quality Management system provide a logical layer in the evaluation process. By assigning a skill to a question in the evaluation form, supervisors and contact center managers are able to measure the performance of a given skill set in the contact center organization. Dashboard widgets and report templates are available to visualize and get an insight into the skill performance trends.

The solution is shipped with a default set of skill definitions, but additional skills can be added easily later on.

Skill administration is available only for the quality management administrators by selecting the **Quality Management/ Skills** submenu.

### Find and list skills

You can use the input fields above the columns in the list to filter the list for a given search term.

To select a skill for editing, just click on the desired row.

Skill Name	Color
After Work	#FF9933
Ending	#FFFF33
Communication	#66CC00
Empathy	#66CCFF
Greeting	#F02333
Knowledge	#993399
Listening	#6B4D21

### Creating a skill

You can create a new skill by clicking on the **Add New Skill** link on the **Quality Management/ Skills** page. After selecting the link, the following page is opened.

The following table describes the available fields:

Field Name	Description	Requirements
------------	-------------	--------------

Skill Name	Name of the skill.	Required field. Minimum length: 3 Maximum length: 64 Must be unique in the system.
Description	Optional description of the skill.	Maximum length: 256
Skill Color	Hexadecimal color code for the skill used in the evaluation forms for better visualization of each skills. By clicking on the input field, a color picker is displayed to easily select the desired color.	Required field. Starting character must be # and it has to be followed by 6 characters.
Valid From	Start date of the validation for the skill.  The validation interval of the skill defines the date range, when the skill can be selected for a question in a new evaluation form.	Required field.
Valid To	End date of the validation for the skill.  You can deactivate the skill with the current date and time by pressing the <b>Deactivate</b> button at the bottom of the page as well.  If you want to reactivate an inactive skill, press the <b>Activate</b> button at the bottom of the page.	-

After filling out the form, press the **Save** button to save skill data into the database.

## Modifying and deleting skills

To edit skill data, you have to click on the desired row of the table showing configured skills. After clicking on the row, a new page opens automatically.

To have changes take effect, push the **Save** button. All conditions, which are described in the previous parts, have to be met. You can freely modify any setting of the skill, but you have to be aware, that the changes will effect all associations for the given skill. E.g. changing the name of the skill, will be also reflected in the reports and data associated with the skill, will be displayed under the new name.

You can delete the skill by pressing the **Delete** button. Deletion of a skill is only enabled if no evaluation form question is associated with the skill. Once a skill is set for a question in an evaluation form, the skill cannot be deleted.

## Skill details

Skills in the Verba Performance and Quality Management system provide a logical layer in the evaluation process. By assigning a skill to a question in the evaluation form, supervisors and contact center managers are able to measure the performance of a given skill set in the contact center organization. Dashboard widgets and report templates are available to visualize and get an insight into the skill performance trends.

Skill administration is available only for the quality management administrators by selecting the **Quality Management/ Skills** submenu.

### Creating a skill

You can create a new skill by clicking on the **Add New Skill** link on the **Quality Management/ Skills** page. After selecting the link, the following page is opened.

**Skill Configuration**
[Back to Previous Skill List](#)

**Skill Data**

<b>Skill Name*</b>	<input type="text" value="Communication"/>
<b>Description</b>	<input type="text"/>
<b>Valid From</b>	<input type="text" value="Feb 28, 2011 3:12:38 PM"/>
<b>Valid To</b>	<input type="text"/>
<b>Skill Color*</b>	<input type="text" value="#66CC00"/>

Creation Date: Feb 28, 2011 3:12:38 PM  
 Created By: Verba Administrator (Administrator)  
 Last Modification Date:  
 Last Modified By:  
[View Change History](#)

\*Indicates required item.

The following table describes the available fields:

Field Name	Description	Requirements
Skill Name	Name of the skill.	Required field. Minimum length: 3 Maximum length: 64 Must be unique in the system.
Description	Optional description of the skill.	Maximum length: 256
Skill Color	Hexadecimal color code for the skill used in the evaluation forms for better visualization of each skills. By clicking on the input field, a color picker is displayed to easily select the desired color.	Required field. Starting character must be # and it has to be followed by 6 characters.
Valid From	Start date of the validation for the skill.  The validation interval of the skill defines the date range, when the skill can be selected for a question in a new evaluation form.	Required field.

Valid To	<p>End date of the validation for the skill.</p> <p>You can deactivate the skill with the current date and time by pressing the <b>Deactivate</b> button at the bottom of the page also.</p> <p>If you want to reactivate an inactive skill, press the <b>Activate</b> button at the bottom of the page.</p>	-
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After filling out the form, press the **Save** button to save skill data into the database.

## Modifying and deleting skills

To edit skill data, you have to click on the desired row of the table showing configured skills. After clicking on the row, a new page opens automatically.

To have changes take effect, push the **Save** button. All conditions, which are described in the previous parts, have to be met. You can freely modify any setting of the skill, but you have to be aware, that the changes will effect all associations for the given skill e.g. changing the name of the skill, will be also reflected in the reports and data associated with the skill, will be displayed under the new name.

You can delete the skill by pressing the **Delete** button. Deletion of a skill is only enabled if no evaluation form question is associated with the skill. Once a skill is set for a question in an evaluation form, the skill cannot be deleted.

---

## Setting up evaluation projects

Agent scoring happens in **evaluation projects**, defined by a **set of calls** and an **evaluation form** used by the supervisors for scoring. This topic provides a detailed overview about the concepts behind the evaluation projects in the Verba Performance and Quality Management system. It also describes the quality assurance process supported by the solution.

- [Evaluation project list](#)
- [Creating an evaluation project](#)

### Evaluation project types

The system supports 2 types of evaluation projects, depending on how the calls/interactions are selected for the project.

#### One time call selection

This project type allows to define an evaluation project for a fixed date interval, where the calls for the project are selected once and new calls cannot be added later. In this way, a one time evaluation project can be created.

This evaluation project type does not allow to modify any of the project settings, after the first call has been evaluated (the project is in active state). Before this action (in planning state), the configuration settings can be freely modified.

#### Recurring call selection

This project type provides a more flexible call selection mechanism compared to the one time call selection, described before. It allows to continuously extend the set of calls selected for evaluation. By defining a recurring call selection method, the project administrator also selects the frequency, which determines how often the system will select new calls for the evaluation project. E.g. if the call selection period is set to month, the system will notify you according to the selected call selection period (every month) and you have to manually select the new calls by clicking on a button. Even the calls, selected for the project, can be modified.

This project type also allows to change the configuration of the call selection method, so new agents can be easily added to the project in this way. The system always applies the filtering options before the actual call selection, which can only be triggered manually. In this way, the system ensures, that the new filtering options will be applied before selecting a new set of calls for the evaluation project.

### Evaluation project status

The evaluation project has different status depending on various conditions.

#### Planning status

The project is in planning status until the first evaluation is made. Practically, the administrator of the evaluation project has to manually start the project to allow the scoring functionality. In planning status the configuration of the project can be freely changed. Even the calls, selected for the project, can be modified.

#### Active status

The project becomes active after the project administrator starts the projects. When a project is in active status, it indicates that the evaluators can work on the project and they can evaluate calls. In active status, depending on the call selection method configured for the project, there are certain limitations regarding the ability to change project settings.

#### Inactive status

If a project is no longer needed or the administrator wants to prevent supervisors from evaluating additional calls in the project, the project can be deactivated manually. In an inactive project, the evaluators cannot evaluate new calls and new calls cannot be selected for the project. Inactive projects are displayed in reports or in dashboard widgets in the same way as active projects. An inactive project can be reactivated any time without any restriction by the administrator.

## Evaluation project list

Project administration is available only for the quality management administrators by selecting the **Quality Management/ Projects** submenu.

### Find and list projects

You can use the input fields above the columns in the list to filter the list for a given search term.

To select a project for editing, just click on the desired row.

### Find and List Projects

Add New Project  
Hide Deactivated Projects

1 item found, displaying all items. Page(s): 1

Project Name	Evaluation Form	Status
Project	Default scorecard	Running

1 item found, displaying all items. Page(s): 1

Export options: [Excel](#) | [CSV](#) | [PDF](#)



## Creating an evaluation project

Project administration is available only for the quality management administrators by selecting the **Quality Management/ Projects** submenu.

### Creating a project

You can create a new skill by clicking on the **Add New Project** link on the **Quality Management/ Projects** page. After selecting the link, the following page is opened.

**Project Configuration - My First Evaluation Project (Planning)**

[Add New Project](#)  
[Back to Previous Project List](#)

Project Data
Call Selection Settings
Select Calls

▼ Project Data

Project Name*	<input type="text" value="My First Evaluation Project"/>
Evaluation Form	<input type="text" value="Default scorecard"/>
Description	<input style="width: 90%;" type="text"/>
Valid From	<input type="text" value="2011 May 9 17:36:31"/>
Valid To	<input type="text"/>

▼ Evaluation Status

Project Status	Planning
Evaluated Calls	0
Calls Waiting for Evaluation	0
Total Calls in Project	0
Last Evaluation	None

▼ Scoring Classification\*

Excellent	<input type="text" value="95"/>	-	<input type="text" value="100"/>	%	<input type="button" value=""/>
Good	<input type="text" value="80"/>	-	<input type="text" value="94"/>	%	<input type="button" value=""/>
Average	<input type="text" value="70"/>	-	<input type="text" value="79"/>	%	<input type="button" value=""/>
Unacceptable	<input type="text" value="0"/>	-	<input type="text" value="69"/>	%	<input type="button" value=""/>
<input style="font-size: small; width: 20px; height: 15px; border: 1px solid #ccc;" type="button" value="+"/>					
Fails Below	<input type="text"/>				

▼ Access Control

Project Owner	Verba Administrator				
Evaluators	<div style="font-size: small; border-bottom: 1px solid #ccc; padding: 2px;">Available users</div> <input type="text" value="Verba Administrator"/>	<input type="button" value="&gt;&gt;"/> <input type="button" value="&lt;&lt;"/>	<div style="font-size: small; border-bottom: 1px solid #ccc; padding: 2px;">Selected users</div> <input type="text" value="Corey Mendoza&lt;br/&gt;Carrie Reid&lt;br/&gt;Chad Gray"/>		

Creation Date: 2011 May 9 14:57:33  
 Created By: Verba Administrator (Administrator)  
 Last Modification Date: 2011 May 9 17:36:58  
 Last Modified By: Verba Administrator (Administrator)  
[View Change History](#)

\*Indicates required item.

The following table describes the available fields:

Field Name	Description	Requirements
Project Name	Name of the project.	Required field. Minimum length: 3 Maximum length: 64 Must be unique in the system.
Evaluation Form	Evaluation form used in the project.	-
Description	Optional description of the project.	Maximum length: 256

Valid From	Start date of the validation for the project.  The validation interval of the project defines the date range, when the supervisors can evaluate calls in the projects or new calls can be selected for the project.	Required field.
Valid To	End date of the validation for the project.  You can deactivate the project with the current date and time by pressing the <b>Deactivate</b> button at the bottom of the page also.  If you want to reactivate an inactive project, press the <b>Activate</b> button at the bottom of the page.	-
Evaluation Status	Shows the current status of the evaluation project.	-
Scoring Classification Label	Label of the classification range. The classification labels allow to provide a simple categorization of the scores achieved by the agents. These labels are displayed on the scorecards.	Required field.  Minimum length: 3  Maximum length: 64
Scoring Classification Interval	The range score values (percentage) defined for the classification.	Required field.  Minimum value: 0  Maximum value: 100  Only positive integers can be defined.  The defined intervals must cover the entire 0 - 100 range and overlapping intervals are not allowed.
Fails Below	Defines the optional point value (the actual value, not the percentage), which has to be achieved in order to pass the scorecard. If the agents does not achieve this value, the scorecard is displayed as failed. This information is displayed on the scorecards.	-
Project Owner	Owner of the evaluation project.	-
Evaluators	Selected supervisors eligible to score calls in the project. Only users with Quality Supervisor role are displayed for selection.  Select the desired users on the left panel and press the >> button to select evaluators.  Select the desired users on the right panel and press the << button to remove evaluators from the project.	At least one evaluator has to be selected.

After filling out the form, press the **Save** button to save project data into the database.

## Configuring call selection

The goal of a quality assurance program is to provide a statistically significant analysis of service delivery and the quality of customer interactions. To accurately measure service quality and establish credibility and reliability for the quality assurance process, randomly captured calls should be evaluated consistently for all agents, on a regular basis.

In order to define the scope of the evaluation project, calls have to be selected and assigned to the project. By configuring the call selection parameters, you can define the set of calls for your evaluation project based on your requirements.

To configure the call selection click on the **Call Selection Settings** tab in the evaluation project configuration window.

**Project Configuration - My First Evaluation Project (Planning)** Add New Project  
Back to Previous Project List

Project Data | **Call Selection Settings** | Select Calls

**Call Selection Settings**

Type: Recurring call selection

Call Selection Period: Week  
The system will notify you according to the selected call selection period (every week) and you have to manually select the new calls by clicking on a button.

**Filtering options**

Date interval:

Display results according to timezone: GMT+01:00 - Europe/Prague - Central European Time

Call detail record fields: +

Full text search in comments:

Full text search in markers:

Comment fields: Default

**Random Selection**

Enable random call selection:

Agent and group selection method: Agent based

Agent selection: Available users: Per Stromfors, Verba Administrator; Selected users: Sharon Harrington, Thomas Powell, Wesley Mack, Sue Mathis

Number of random calls to be selected in each period (week): 0 /agent

The following table describes the available configuration options:

Field Name	Description	Requirements
Type	The system supports 2 types of evaluation projects: <ul style="list-style-type: none"> <li>One time call selection</li> <li>Recurring call selection</li> </ul> For further information, see <a href="#">Setting up evaluation projects</a> .	-
Call Selection Period	For projects with recurring call selection, the system notifies the project administrator and the evaluators according to the selected call selection period and the user has to manually select the new calls by clicking on a button.	-
Date Interval	Calls will be selected for the project in this date and time range. If you are using recurring call selection, then the end date cannot be set.	-
Call detail record fields	Here you can configure the filtering criteria for call selection based on the available metadata fields. For further information on how to use these options, see <a href="#">Search filter operators</a> .	-
Full text search in comments	Define full text search in any comment field.	-
Full text search in markers	Define full text search in any marker hint field.	-

Comment fields	Define filter option on specific comment templates and fields.	-
Enable random call selection	This option enables to select the calls for evaluation in a random way using mathematically correct random selection algorithms.	-
Agent and group selection method	<p>Defines the way how the calls are selected randomly. The following valid values apply:</p> <ul style="list-style-type: none"> <li>▪ None - the random calls are not selected for agents all groups. specifically.</li> <li>▪ Agent based - the same amount of random call is selected for each selected agent.</li> <li>▪ Group based - the same amount of random call is selected for each selected group. The number of random calls for the agents in the selected group are sampled randomly and there is no guarantee that all agents will have the same amount of random calls.</li> </ul>	-
Agent / Group selection	<p>Selected agents or groups will used during the random selection.</p> <p>Select the desired agents or groups on the left panel and press the &gt;&gt; button to select them.</p> <p>Select the desired agents and groups on the right panel and press the &lt;&lt; button to remove them from the project.</p>	At least one agent or one group has to be selected.
Number of random calls to be selected in each period	This value defines the number of random calls to be selected in each period for each agent or group or all together.	<p>Only positive integers can be defined.</p> <p>The value has to be greater than 0.</p>
Random call sample size calculator	<p>The random sample size calculator helps you to properly define the number for random calls. The calculator uses a mathematically and statistically correct way to determine the size of the sample.</p> <p>By entering or modifying the values in the calculator, the system automatically calculates the number of recommended calls to select. The total number of calls available for evaluation is calculated (by pressing the <b>Calculate</b> button) using the above configured filtering options.</p>	-

Once you finished the configuration of the call selection settings, you can save the configuration by pressing the **Save** button.

In order to actually select the calls, navigate to the **Select Calls** tab. On this page, the system will inform you about the current call selection process and status. Press the **Select Calls** button to start the call selection process. This process may take a while. Once the selection process is over, the selected calls are listed on the screen.

Depending on the configuration settings and the status of the project, the system allows you to modify the call selection settings or reselect all calls for the project. When the project is still in planning status, you can reselect the calls for the project. Please be aware that existing calls will be replaced by the new ones.

For projects with recurring call selection, the project administrator or the evaluators have to manually select additional calls based on the call selection period settings. You can update the filtering and selection settings before adding new calls to the project.

## Modifying and deleting projects

To edit project data, you have to click on the desired row of the table showing configured projects. After clicking on the row, a new page opens automatically.

To have changes take effect, push the **Save** button. All conditions, which are described in the previous parts, have to be met.

You can delete the project by pressing the **Delete** button. Deletion of a project is only enabled if no evaluation is made for the project and the project is in planning status. Once a project is started, the project cannot be deleted.

## Evaluating and scoring interactions

This topic describes how the actual evaluation project is executed by supervisors.

- [Find and list calls for evaluation](#)
- [Scoring](#)
- [Calibrating evaluations](#)

## Find and list calls for evaluation

Because of the project based framework, calls are initially have to be associated/linked to an evaluation project. Once the calls are selected for a project, evaluators can start working with the calls. Only supervisors, configured as evaluators are able to evaluate calls in a given project. In order to list calls for evaluation, click on the **Quality Management/ Evaluations** submenu.

The evaluations list is based on the general call listing feature of the system. It extends the searching and listing functionality with evaluation specific features:

- Ability to search using fields like: evaluation project, form, evaluator and score values.
- Access scoring interface directly from the list.
- Filter the list for calls waiting for evaluations with a single click.
- Customize the list layout and displayed columns independently from the original call list layout.
- Save and load search templates in the similar way as with call lists.

### Evaluation search panel

The evaluation list screen contains the search panel, which allows to search for calls waiting for evaluations or calls already evaluated. The magnifier icon on the upper right side of the panel can be used to control the 3-state appearance of the panel.

Search
Enter a label here...
🔍

**Basic Search Options**

May, 2011							
Today							
wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
17							1
18	2	3	4	5	6	7	8
19	9	10	11	12	13	14	15
20	16	17	18	19	20	21	22
21	23	24	25	26	27	28	29
22	30	31					

Time:  :

Select date

May, 2011							
Today							
wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
17							1
18	2	3	4	5	6	7	8
19	9	10	11	12	13	14	15
20	16	17	18	19	20	21	22
21	23	24	25	26	27	28	29
22	30	31					

Time:  :

Select date

Time of the day

Phone Number (Caller or Called Party)

User

**Advanced Search Options (\*)**

Display results according to timezone

Evaluation Project

**Comment Fields**

---

This page allows the user to enter the search criteria to find already evaluated calls or calls waiting for evaluation. The search criteria attributes are divided into groups and placed on 3 separate vertical tabs to make search criteria definition easier:

- **Basic Search Options** tab includes the most commonly used search fields
- **Advanced Search Options** tab includes the remaining technical attributes that allow more sophisticated search criteria to be defined and used
- **Comment Fields** tab allows the user to narrow the search using the business data associated with the call records (stored in comment fields)

The user can navigate between these tabs until the entire search criteria has been specified and then initiate the search by pressing the **Search** button below the tabs.

The search is executed based on the combined set of search field values on all tabs.

After setting the search criteria, the system stores the field values, so whenever the user loads the search page the previous settings are restored and displayed. If you would like to reset the fields, click on the **Reset Search Fields** link in the top right corner of the search panel.

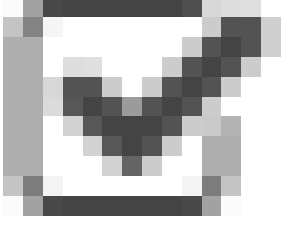
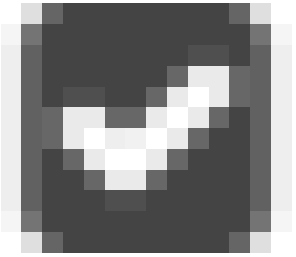
All search fields support adding multiple query/filtering parameters. Follow the steps below to add one or more filters to the desired search field:

- Step 1** Click on the **Add Criteria** icon and select the desired field from the drop-down menu
- Step 2** Choose the operation from the appearing drop-down menu
- Step 3** Set the criteria on the right side of the panel
- Step 4** Optionally you can remove a previously added criteria by clicking the **Delete Criteria** icon on the left side of the panel



## Scoring

The scoring interface can be accessed from the evaluations list under **Quality Management / Evaluations**. Each conversation listed contains an icon indicating the scoring status of the conversation.

Icon	Name	Description
	Evaluate conversation	By pressing this icon, the supervisors can start the evaluation process for the conversation. A new screen is opened with the scoring interface.
	View scorecard	Once a conversation is evaluated, the users can view or modify the scorecard by pressing the icon.

When the scorecard is opened, the conversation is automatically loaded into the player. In this way, evaluators can immediately start the evaluation process.

The scorecard interface includes a scorecard toolbar on the top, the evaluation form, and the standard player.

**Scorecard**  
Start time: 16:17 | Elapsed: 00:02:51 | Score: 110/69 (63%) - Unacceptable | No feedback sent yet.

**Form and Conversation Details**

**Scores by skills**

**Customer Experience** 110 / 69 (63%)

- Amount of rings before the phone was answered?  1 Ring  2 Rings  3 Rings 5 / 1 (20%)
- Was the call put on hold?  Yes  No 5 / 5 (100%)
- If put on hold how long was the Hold period?  <30 Seconds  30-60 Seconds  Over 60 Seconds  N/A 5 / 3 (60%)
- Did the counterperson identify himself?  Yes  No 10 / 10 (100%)
- Was the caller greeted in a professional Manner?  Yes  No 10 / 10 (100%)
- Was the part requested in stock? If no, was an alternative provided?  Yes  No 10 / 10 (100%)

**Conversation View**

00:00 00:27 00:54 01:21 01:48 02:15 02:42 03:09 03:36 04:03 04:30

Paused 00:00:17.233

**Markers**

- 1. 01:31 - 01:36 Some text
- 2. 01:53 - 02:04 comment
- 3. 02:13 - 02:34 some comments

**Transcription**

M1: Finally I'd like to discuss our social initiatives . The basic idea here is that the best type of advertising is a message from a friend . People want to offer advertisers the best tools to create ads that are social . We believe that the more are the more advertising include interesting content from people you care about the more marketers will be able to create advertising that adds value to people's experience on Facebook advertise on Facebook today is already delivering a compelling or a lie even though most advertising on Facebook today isn't social . We believe the experience can be better and more social experience . For example if I like a restaurant that my friends might see that I like that place and that's more or less likely a more convincing ad than anything the restaurant would produce on its own . That's an example of aligning social activity and one important aspect of social ad is that they're based on social activity . They've been to our menu food products on both mobile and desktop . This is important because mobile users already spend so much time

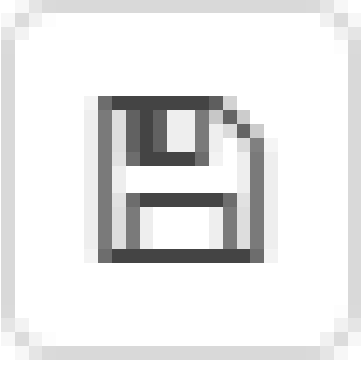
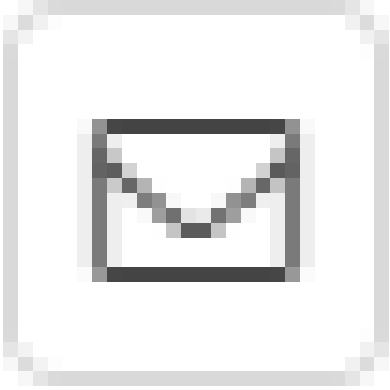
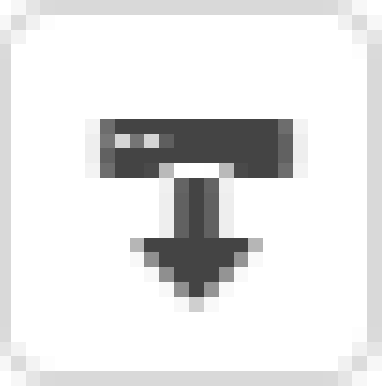
While the evaluator is filling out the form, the system automatically marks the already answered questions with a white background color and places a red line after the last answered question. The screen automatically scrolls and tries to follow the evaluator during the fill out process.

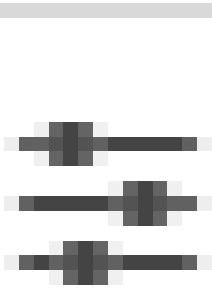
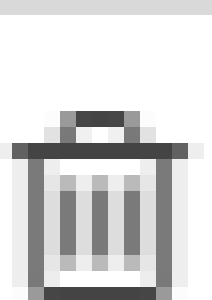
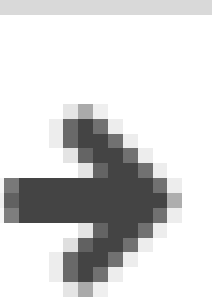
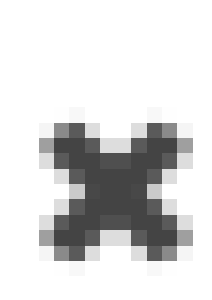
The total score is displayed in the heading of the form and is dynamically updated as you evaluate the agent by making selections and inputting answers to the questions on the page. The scores earned for each question are displayed and also updated automatically when the evaluator selects the answer.

### Scorecard toolbar

The scorecard toolbar, located on the top section of the scoring screen, provides access to important functions regarding the evaluation process and displays vital information for the evaluator. The following table summarizes the available functions and data displayed on the toolbar:

Icon	Name	Description
-	Start time	Start time of the evaluation. It always reflects the time, when the scorecard was opened.
-	Elapsed	Total time spent on the evaluation. The system automatically measures the time. Once the scorecard is saved, the system also saves the time spent on the evaluation. If the evaluator does not save the scorecard, the time is not recorded. If the evaluator reopens the scorecard, modifies it and save it, the extra time spent on the update will be added to the original timer value.  During the evaluation of the supervisors, this value is reported and compared to the duration of the call recording.

-	Score	<p>The actual score value with classification: "170/65 (38%) - Unacceptable", where:</p> <p>170 - total points available</p> <p>65 - points earned</p> <p>38% - score</p> <p>Unacceptable - classification</p>
	Save scorecard	Allows saving the scorecard.
	Share scorecard	<p>Once the scorecard is saved at least once, the scorecard can be shared. A unique URL is opened in the default email client on the computer, which can be sent to the agent. Having the URL, the evaluated agent, the administrator, the evaluator, the quality management administrators, the system supervisors, and the sender are able to access the scorecard.</p>
	Download as PDF	Exports the scorecard to PDF format.

	Calibrate	By pressing this button, the evaluator can start a new calibration for the call. This button also provides access to previous calibrations for the call. The small number in the bottom right corner of the icon displays the number of calibrations for the call. If there is no calibration for the call, nothing is displayed.
	Delete scorecard	Deletes the scorecard. This action cannot be undone.
	Evaluate next call in the project	Switches to the next call in the project.
	Close scorecard	Closes the scorecard without saving it and returns the browser to the evaluations list.



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## Calibrating evaluations

### Process overview

Calibration, a method for building consensus and delivering a standardized evaluation tool, is key to the success of all quality assurance programs. It is designed to ensure that quality assurance results are valid and based on reliable measurement tools. For a quality assurance program to be credible and produce accurate and dependable results, it is essential that all reviewers evaluate transactions on a consistent basis.

Calibration is a process where all **quality assurance reviewers discuss how to score various types of transactions**. The quality assurance reviewers meet and review agent transactions.

**Every individual scores the same transactions** and then scoring differences are identified. The reviewers then discuss the reasons for the differences and reach consensus.

### Marking an evaluation for calibration

The Verba Performance and Quality Management system allows the evaluators of a given project to **score calls for calibration purposes**. The calibration scores are not shown or used on regular reports and are only displayed in [special calibration reports](#). Evaluators just have to select a call for calibration and evaluate the calls. The system stores each evaluation as a separate calibration for each evaluator/supervisor. There is no limitation on the number of calibrations on a given call.

Please follow the steps below to mark an evaluation for calibration:

**Step 1** Search for the call, which is selected for the calibration process. Navigate to the **Quality Management / Evaluations** menu item and use the search panel on the left to find the desired call. Only calls already selected for an evaluation project are listed here.

**Step 2** Click on the **Evaluate call / View scorecard** icon. This will load the scoring interface for the call. Calls already evaluated or calls waiting for evaluation are all available for calibration.

**Step 3** Once the scoring interface is loaded, click on the **Calibration** icon on the top right toolbar.

**Step 4** Once you press the **Calibration** button, the system automatically starts a new evaluation process. Just evaluate the call as you would normally do.

**Step 5** After finishing the evaluation, press the **Save** button or the **Save scorecard** icon on the top toolbar.

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# Reporting and Dashboards

## Reporting

The Verba Recording System and the Verba Performance and Quality Management solution include a powerful reporting solution enabling business decision makers, supervisor and IT department members to gain insight into the various metrics of the contact center operation. The easy-to-use and flexible reporting module allows creating visually compelling, standard format reports right at your fingertips. The 100% web-based user interface is accessible directly from the Verba Recording System framework at any and from any location without the need of installing client applications. Reports can be generated in an ad-hoc or scheduled way to increase productivity and reduce waiting time.

Open, flexible and feature-rich reporting server:

- Enterprise grade reporting server based on JasperSoft Business Intelligence (BI) suite
- 30+ built-in report templates (Call Activity, Quality Management, System)
- Ad-hoc, scheduled and periodic report creation options
- Flexible date and time interval configuration with absolute and relative options
- Detailed filtering options
- Several output formats: PDF, XLS, XLSX, DOCX, RTF, XML, etc.
- Ability to save report templates for future use
- Open API and tools for designing your own report templates

Visit the [Reporting Guide](#) for more details.

## Dashboards

The Verba Recording System and the Verba Performance and Quality Management solution dashboards provide an at-a-glance view of agent performance and other various metrics of the recording system for many individuals in an organization. They give companies a factual and timely window into performance; help them identify anomalies that could turn into significant business issues, and provide an entry point for examining the deeper root causes.

- Stunning, personalized information at your fingertips
- Personalized dashboards
- Visually compelling information widgets
- 20+ built-in widget types (Call Activity, Quality Management)
- Flexible date and time interval configuration with absolute and relative options
- Detailed filtering on various fields
- Chart and table display options
- Configurable widget layouts
- Open widget API (you can develop your own widget)

Visit the [Dashboard Guide](#) for more details.

## Screen capturing

Screen capturing is an **optional capability** of the Verba Performance and Quality Management system. Contact center supervisors, managers are now able to monitor and evaluate agent performance by recording the content of the agents' computer desktop screen during the calls.

### Summary

The **lightweight desktop recorder** with a screen capture module is installed on the agent computer and it automatically records the screen activity during the agent's calls. The recorded screen capture video files are automatically uploaded to the Verba Media Repository server, where the files are merged with the audio counterparts, providing a single, synchronized media file for playback. The upload process is configurable and it supports scheduling. As all other system components, these screen capture modules are also configured and managed centrally. Administrators can simply apply common settings for all agent computers by a single mouse click, through a configuration profile on the web based management interface.

### PCI DSS compliance

Payment Card Industry Data Security Standard (PCI DSS) or other policies require controlling the screen capturing by pausing and resuming the process when certain conditions are met, e.g. card holder PIN code is entered by the agent on the screen. In order to comply with these requirements, Verba Screen Capturing module has a powerful, standard based Application Programming Interface (API).

For more detailed information about screen capturing read [Screen capture](#).