
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.