



Quality Monitoring Form Designer User Guide

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11/608,440; US 11/608,894; US 11/616,490; US 11/621,134; US 11/676,818; US 11/691,530; US 11/692,983; US 11/693,828; US 11/693,899; US 11/693,923; US 11/693,933; US 11/712,933; US 11/723,010; US 11/729,185; US 11/742,733; US 11/752,458; US 11/771,499; US 11/772,440; US 11/776,659; US 11/804,748; US 11/824,980; US 11/831,250; US 11/831,257; US 11/831,260; US 11/831,634; US 11/844,759; US 11/868,656; US 11/872,575; US 11/924,201; US 11/937,553; US 11/959,650; US 11/968,428; US 12/014,155; US 12/015,375; US 12/015,621; US 12/053,788; US 12/055,102; US 12/057,442; US 12/057,476; US 12/107,976; US 12/118,781; US 12/118,789; US 12/118,792; US 12/164,480; US 12/245,781; US 12/326,205; US 12/351,370; US 12/416,906; US 12/464,694; US 12/466,673; US 12/483,075; US 12/497,793; US 12/497,799; US 12/504,492; US 12/539,640; US 12/608,474; US 12/628,089; US 12/684,027; US 12/686,213; US 12/708,558; and other U.S. and International Patents and Patents Pending.

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About this Guide

The Form Designer User Guide describes the Form Designer application, the tasks required to create and manage forms, as well as information for frequently asked questions and troubleshooting.

Intended Audience

This guide is designed to be used by:

- Professional services staff responsible for planning and setting up forms for evaluations and assessments.
- Customers' staff responsible for designing forms.

Related Documents

This section lists other guides in the documentation set that the current guide references or that may be useful. The following documents are referenced in, or related to, this document:

- *CIC Support Website Navigation Guide*
- *Interactions and Analytics Reports User Guide*
- *Desktop Application Deployment Reference and Installation Guide*
- *Enterprise Suite User Management Guide*
- *Interactions and Analytics Administration Guide*

Getting Started

The Form Designer helps you create and manage forms, question types, and scoring parameters.

- [Form Designer Overview](#), page 11
- [Form Design Workflow](#), page 12
- [Other Form Designer Activities](#), page 12
- [Form Customization Options](#), page 13
- [Form Designer Privileges and Roles](#), page 14

Form Designer Overview

The Form Designer allows you to create customized forms to evaluate agent performance and the customer contact experience.

You use the Form Designer to perform the following tasks:

- Create a form from an empty form or from an existing template
- Design the form questions and scoring
- Manage the form library and data

You must have access rights assigned to you in User Management, in the Roles Setup tab, to perform these tasks. See ["Form Designer Privileges and Roles"](#) on page 14 for more information.

The forms you create are filled in by evaluators and assessors using the Quality Monitoring and Customer Xperience applications to:

- **Evaluate Agents:** In the Quality Monitoring application, forms are used to evaluate agent performance. Agent scores are used to track the progress of an agent's performance or to compare the agent's performance with other agents.
- **Assess Contacts:** In the Customer Xperience application, forms are used to assess the customer experience with the organization, from the beginning, to the end of the customer contact.

The Form Designer can be used online as part of the inContact Interactions and Analytics suite and is available separately as an offline standalone component, with modified functionality. The standalone component can be installed on the customer's workstations, to help customers set up their forms in advance, prior to installing the Interactions and Analytics suite. See the *inContact Desktop Application Deployment Reference and Installation Guide* for more information.

The following topics describe the Form Designer interface and the layout of a typical form:

- [Form List Window](#), page 17
- [Form Designer Window](#), page 18
- [Typical Form Layout](#), page 22

Form Design Workflow

The general process to design a form has the following steps (you can decide whether you need to perform all the steps):

- 1 [Accessing Form Designer](#), page 28
- 2 [Creating a Form](#), page 27
- 3 [Defining the General Form Properties](#), page 35
- 4 [Setting Up the Header](#), page 37
- 5 [Setting Up the Footer](#), page 40
- 6 [Creating Form Components](#), page 44
- 7 [Defining Properties for a Section or Category](#), page 45
- 8 [Defining Properties for a Question](#), page 50
- 9 [Defining Form Calculations](#), page 67
- 10 [Defining Component Scoring](#), page 71
- 11 [Creating Form Rules](#), page 91
- 12 [Checking the Form Calculation](#), page 110
- 13 [Staging a Form](#), page 108
- 14 [Setting Form Status](#), page 108

Other Form Designer Activities

You can use Form Designer for the following activities:

- [Creating Form Templates](#), page 30
- [Creating and Attaching Linked Forms](#), page 31
- [Duplicating Form Components](#), page 58
- [Adding Shared Form Components](#), page 58
- [Managing and Maintaining Forms](#), page 101
- [Using the Form Design Library](#), page 116

Form Customization Options

The Form Designer is flexible and can be used to customize form appearance, reuse, status, and scoring, as described in the following table.

Form Customization Option	Description
Appearance and Reusability	- Customizable Fields and Components: You can customize individual fields and components throughout a form, depending on your company's requirements. The custom data field enables you to customize the form header according to the scope of the form. You can add a field for a campaign name, with an attached list of choices for customer service or marketing. - Free Text Fields: You can add extra information and increase form flexibility when you use free text fields to add comments in components. - Component Appearance: You can use the options to control whether a component is collapsed, hidden, enabled, and so on. - Previewing and Testing: You can use the available options to preview and test the form you created, before you publish it for use. - Reuseability: You can create shared components to promote consistency across all forms.
Status	Form Status and Distribution: You can control a form's progression in the system by allocating a status to each form to control the distribution of the form.
Scoring and Visibility	- Scoring: You can designate a scoring method for each form, section, or category. You can use different methods across the same form and set various parameters to configure the score of each component in the form. - Rules: You can attach a list of rules to each question or custom data field in a form to trigger visibility and scoring actions, as follows: - Scoring Rules: You can create a scoring rule to change a value, add, or subtract the score for a question, section, or category. - Visibility Rules: You can use visibility rules to set a component's appearance or enabled state.

Form Designer Privileges and Roles

Only authorized users have access to the Form Designer. Before opening the Form Designer, you must be signed on to the server as a user with the appropriate roles assigned in User Management, in the Roles Setup tab.

The table below summarizes the activities, required privileges, and associated roles for the Form Designer.

Activity	Required Privilege	Associated Role
Access Form Designer	Form Designer	Administrator Enterprise Manager Administrator
Create form	Create Forms	Administrator Enterprise Manager Administrator
Stage form	Form Designer	Administrator Enterprise Manager Administrator
Publish form template	Form Designer	Administrator Enterprise Manager Administrator
Hide form	Hide Forms	Administrator Enterprise Manager Administrator
Modify form	Edit Form	Administrator Enterprise Manager Administrator
Delete form	Delete Form	Administrator Enterprise Manager Administrator
Edit form	Edit Form	Administrator Enterprise Manager Administrator
Export form	Export and Import Forms	Administrator Enterprise Manager Administrator
Import form	Export and Import Forms	Administrator Enterprise Manager Administrator
Enable and disable Custom Data or Status field	Form Designer	Administrator Enterprise Manager Administrator
Create rating set	Manage Shared Data	Administrator Enterprise Manager Administrator
Delete rating set	Form Designer	Administrator Enterprise Manager Administrator
Create shared data	Manage Shared Data	Administrator Enterprise Manager Administrator

Activity	Required Privilege	Associated Role
Modify shared data	Manage Shared Data	Administrator Enterprise Manager Administrator
Create shared component	Manage Shared Component	Administrator Enterprise Manager Administrator
Modify shared component	Manage Shared Component	Administrator Enterprise Manager Administrator
Add value to Custom Data or Status field	Form Designer	Administrator Enterprise Manager Administrator
Add value to Rating field	Form Designer	Administrator Enterprise Manager Administrator
Delete value from Custom Data or Status field	Form Designer	Administrator Enterprise Manager Administrator
Remove value from Rating field	Form Designer	Administrator Enterprise Manager Administrator

See the *User Manager Application User Guide* for more information.

Form Designer Interface

This topic describes the Form Designer interface.

- [Form List Window](#), page 17
- [Form Designer Window](#), page 18

Form List Window

When you access the Form Designer, the Form Designer Form List opens. The Form List shows the list of existing forms and form versions that are available in the system, grouped by the following form types:

- Evaluation and Assessment Forms: See [Creating a New Form](#), page 28
- Templates: See [Creating Form Templates](#), page 30
- Linked Forms: See [Creating and Attaching Linked Forms](#), page 31

In the Form List window, you can view a list of all existing forms and form revisions, create a new form, edit or delete forms, change a form's status or name, view form types, export and import forms, export the form list, sort and filter the form list, refresh the form list, and build a form design library. See "Using the Form Design Library" on page 116 for more information.

When you create a new form, the **New Form** dialog box opens. See "Creating a New Form" on page 28.

When you select an existing form, the Form Designer window opens. See "Form Designer Window" on page 18.

To make it easier to access the information you need, you can customize the Form List by applying filters and sorting the list by specific parameters. See "Sorting and Filtering the Form List" on page 102 for more information.

In the example below, the Form List window shows a list of forms. The General Evaluation form is expanded, and shows the different form versions, status, and form type.

To display all previous versions of the form, in the Form List, click the + button next to the form name to expand the version list for the form.

Form List Toolbar



Form List Window									
Type: Evaluation and Assessment Forms				Shared Components		Shared Data			
Form Name	Version	Status	Form Type	Description	Revision Notes	Creation Date	Last Update	Author	
Assessment:									
Assessment	2	Published	Assessment			7/30/2008	7/30/2008	AppUser	
Assessment	1	Hidden	Assessment			7/29/2008	7/30/2008	AppUser	
Evaluation Health - revised:									
EvaluationHealth:									
EvaluationInsurance:									
EvaluationInsurance	1	Published	Evaluation			7/30/2008	7/30/2008	AppUser	
Expert Criteria for Claim Adjudication(Production):									
General Evaluation Form:									
General Evaluati...	1	Published	Evaluation	Original Form		7/23/2009	7/23/2009	David Kahn	
Halo Enterprise Quality Evaluation Form:									
New Form:									

The following table describes the main elements of the Form List toolbar.

Form List Toolbar	Description
	New Form: Creates a new form. See "Creating a New Form" on page 28.
	Open Form: Opens an existing form for editing. See "Editing Forms" on page 103.
	Delete Form: Deletes a form. See "Deleting a Form" on page 113.
	Change Status: Changes the form status to control the forms availability. See "Setting Form Status" on page 108.
	Export Form: Saves a form to a file. See "Exporting a Form" on page 111.
	Import Form: Imports and opens a file that can be saved in the Form Designer. See "Importing a Form" on page 111.
	Export to Excel: Exports the Form List to Excel. The form list can be used to notify other users of a new form, or provide a list of forms of specific interest.
	Rename: Renames a form. See "Renaming a Form" on page 112.
	Refresh: Refreshes the current version of the form list. When the list is refreshed, you can view any changes made to the list by another user, such as deleting a form, adding a new form version, or adding a new form. To refresh the view, in the Form List toolbar, click Refresh . An updated version of the form list is displayed.

Form Designer Window

The Form Designer window opens when you select a form from the Form List. In the Form Designer window, you define the general properties of the form and specific properties for the header, footer, rules, calculations, sections, categories, and questions of the form.

As shown in the graphic below, the Form Designer window contains two panes:

- **Left Pane:** The left pane displays a navigation tree representing the form structure and hierarchy. As the form design progresses, the tree expands.

The navigation tree has a toolbar to create new components, move components in the tree, delete, and add shared components. See ["Adding Shared Form Components"](#) on page 58 for more information on shared components.

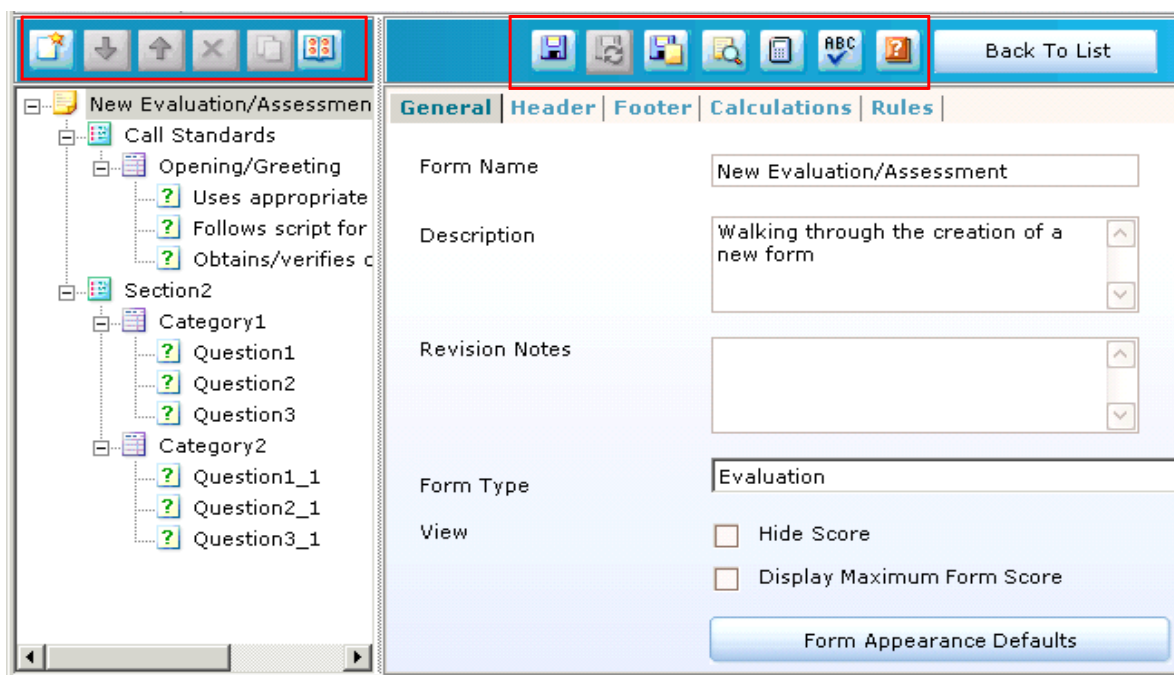
There is a right-click context menu at each level of the hierarchy to create a new child component, duplicate, or delete a component.

- Right Pane:** The right pane provides the main working area where the details of each form component are defined. The appearance of this pane depends on the element selected in the left pane. When you select the form name in the left pane, the form properties tabs (General, Header, Footer, Calculations, and Rules) are displayed. The right pane has a toolbar for saving, previewing, calculating scores, spell checking, Help, and returning to the Form Designer List.

There is a right-click menu with basic actions (Undo, Cut, Copy, Paste, Delete, Select All) for the Form/Header/Footer Name, Description, and Revision Notes text fields in the right pane of the Form Designer window.

Navigation Toolbar

Workspace Toolbar



The following table describes the major elements of the Navigation toolbar in the navigation tree pane of the Form Designer.

Navigation Toolbar	Description
	New Component: Adds a new section, category or question to a form
	Move Down: Moves a component on the navigation tree down one place
	Move Up: Moves a component on the navigation tree up one place
	Delete: Deletes a component and it's defined properties from the form

Navigation Toolbar	Description
	Duplicate: Adds a duplicated component to the form (properties can be edited)
	Add Shared Component: Adds a shared component to the form

The following table describes the major elements of the Workspace toolbar in the main working area pane of the Form Designer.

Workspace Toolbar	Description
	Save: Overrides the current version of a form with the status Under Construction or Staged, and retains the current status. See "Saving Forms" on page 106 for more information.
	Save New Version: Saves a form with the Published or Hidden status as a new form version, with the status Under Construction. See "Deleting a Form" on page 113 for more information.
	Save As: Saves an edited form of any status as a new form. See "Saving Forms" on page 106 for more information.
	Preview: Generates a preview of the form for printing. When you click Preview, a window opens with a read-only version of the form you are designing. The ability to print a form is only available in Preview mode. Print is enabled only after saving or submitting an evaluation. To print a form that has not been submitted, you must create a staged form and print it during the form fill-in. 1 To print a form, click File in the toolbar and select Print. 2 Select the parameters for printing the form. 3 Click OK.
	Calculate: Shows a breakdown of the form's score and calculates the maximum form score.
	Spell Check: Opens the spell checker. To open the spell checker, click Spell Check .
	Help: Opens the Help for the Form Designer.

Typical Form Layout

This topic describes the layout of a typical form.

- [Typical Form Layout](#), page 22
- [Main Form Component Hierarchy](#), page 24
- [General Form Components](#), page 25

Typical Form Layout

To structure to a form and provide guidance to the person filling in the form, you create the form as a collection of smaller components.

A typical form includes the following components:

- [Main Form Component Hierarchy](#), page 24: The main form components are sections, categories, and questions
- [General Form Components](#), page 25: The additional form components are General Information, Header, and Footer

NOTE

The component names are customizable per system and can have different titles if the captions have been modified in your system.

Fully customizable instructions or descriptions can be added to any component in the form: In the header, a section, a category, a question, and in the footer.

The sample form below shows the general information and header (**Details**) data and two sections, with categories and questions. The footer (**Summary**) can include ratings and status fields.

The screenshot displays the 'SampleEvaluationForm (New)' in the 'General Information' tab. The form is structured as follows:

- Form Header:** Includes 'Form Name: SampleEvaluationForm', 'Evaluator: Super User', 'Agent: appadmin, appadmin', 'Group: Your Company Name' (dropdown), and 'Comments:' (text area). The 'Score' is 'No Score'.
- Section1:** A red-bordered section containing:
 - Category1:** A green-bordered category containing 'Question1' (radio buttons: Yes, No, N/A) and 'Question2' (radio buttons: Exc., Good, Avg., Fair, Poor, N/A). A red arrow points to the 'View/add comment' icon next to Question1.
 - Category2:** A purple-bordered category containing 'Question1' (radio buttons: Exc., Good, Avg., Fair, Poor, N/A) and 'Question2' (radio buttons: Yes, No, N/A). A red arrow points to the 'View list of annotations' icon next to Question2.
- Section2:** A blue-bordered section containing 'Category1_2' and 'Category2_2', each with a 'Score:' field.
- Form Footer:** A blue-bordered section containing 'Comments:' (text area).

Main Form Component Hierarchy

The three main building blocks to create a form are:

- [Sections](#), page 24
- [Categories](#), page 24
- [Questions](#), page 24

Sections

A form section is a structural component that contains categories and questions. A form must have at least one section, which includes at least one category.

Each section has its own name, scoring method, scoring parameters, and the option to display the section score to the user. You can include a comment field to collect additional input, and specify an instruction that appears at the top of the section, to provide guidance for users filling in the section. You can also view annotations.

The way the section appears when the form is filled in is also configurable. The section can be configured to appear collapsed, expanded, or hidden. The section can be configured to only be shown depending on the way another form question was answered, or based on a value in the form custom data fields.

The section can appear collapsed or expanded by default, and can also be hidden by default, and only shown, depending on the way another form question was answered or based on a value in the form custom data fields. See [Creating Visibility Rules](#), page 91 for more information.

Categories

A form category is a structural component that contains a collection of questions. A category must include at least one question. A category can include questions of the same type (for example, all Yes/No questions), or a mixture of different types of questions.

Each category has its own name, scoring method, scoring parameters, and the option to display the category score to the user. You can include a comment and/or instruction field for collecting additional input, and choose whether to collapse or hide the category by default. You can also view annotations.

The way the category appears when the form is filled in is also configurable. The category can be configured to appear collapsed, expanded, or hidden. The category can be configured to only be shown depending on the way another form question was answered, or based on a value in the form custom data fields. See [Creating Visibility Rules](#), page 91 for more information.

Questions

Several types of questions are used to rate agent performance or evaluate contact center processes and collect information. You can also view annotations.

Each question is defined by the question text itself, the type of answers available, the scoring method, and scoring parameters. Questions can optionally include a Reason field. The Reason field can provide an explanation for the scoring of a question or can be a predefined list of available reasons to select from, to explain why a specific answer was chosen.



TIP If you can anticipate that a specific answer is most likely to be selected for a question, the form can be preconfigured with a default answer to save time in filling in the form.

A question can be marked as mandatory to ensure the form cannot be submitted without providing an answer, and can include an additional comment field (1024 characters) for collecting additional information.

As for all other components, an instruction field is available for a question.

A question can be set to be hidden by default, and only shown depending on the way another form question is answered, or based on a value in the form custom data. See [Creating Visibility Rules](#), page 91 for more information.

General Form Components

Besides the components that organize the questions, a form has general components to provide additional information to the form user. The additional general components are:

- [General Form Information](#), page 25
- [Form Header](#), page 25
- [Form Footer](#), page 26

General Form Information

Each form must be set up with some basic properties, such as name, description, revision notes, form type, and default formatting. When you define general information, you configure the default form appearance and whether scores are displayed to the user when the form is filled in. The rest of the general information appears in the Form Designer main window.

Form Header

The form header holds information about the evaluation that is auxiliary to the form questions themselves. When filling in the form, the header appears at the top of the

form and displays the name of the person filling in the form, the name of the agent, and, in the Quality Monitoring application, the name of the agent group in question.

- The form header can be designed to include Form Custom Data selected from a predefined repository to customize the scope of the form.
- For example, a **Campaign Name** field can be added to the header, with an attached list of choices for either Customer Service or Marketing. The header can also include any instruction that applies to the header, such as an explanation of the custom data.
- A comment text box can be added to the header, to allow users filling in the form to insert a comment that refers to the entire form.
- The header appearance (collapsed or expanded by default), and header name can also be configured.

Form Footer

The form footer is a summary component located at the end of the form. It includes a rating field, which is a verbal translation of the achieved score, based on the form calculation. For example, the rating set **Medium Ratings**, which translates as a score of 50-70 points, can be chosen from the list in the footer.

The footer has the following properties:

- Two custom status fields can be added to the footer for further data collection.
- The footer can include instructions and a free text comment field for concluding notes.
- The footer's appearance is configurable, and can be set to be collapsed or expanded by default.

Creating a Form

This topic describes how to create a typical form from an empty form, a template, or an existing form and how to create and attach linked forms.

- [Accessing Form Designer](#), page 28
- [Creating a New Form](#), page 28
- [Creating Form Templates](#), page 30
- [Creating and Attaching Linked Forms](#), page 31

Accessing Form Designer

- 1 To access Form Designer, do one of the following:

- Click the desktop shortcut.



- Select Form Designer from **Start > Programs > Form Designer**.

The login screen appears.

- 2 Log on to the inContact system.

Form Designer loads and the Form List opens.

Creating a New Form

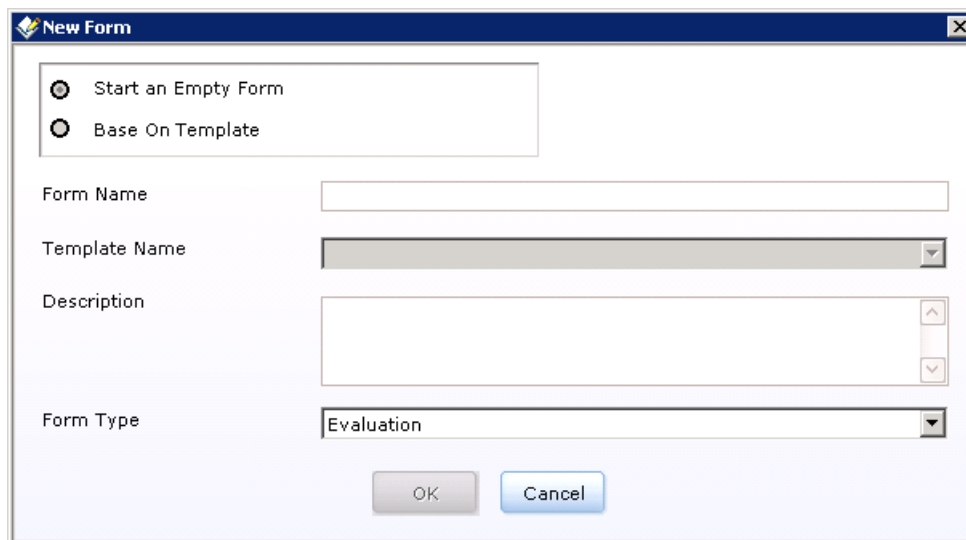
You must have the right to create a new form assigned to you in the inContact Portal, in User Management, in the Roles Setup tab. To create a new form, do one of the following:

- To start an empty form and add its components one at a time, see ["Starting an Empty Form"](#) on page 29.
- To create a form that will inherit the layout and definitions defined in a template, and add, remove, and modify the form components as required, see ["Creating a Form Based on a Template"](#) on page 30.
- Choose one of the sample forms provided with the application.

If you are working in a non-English language, the sample forms are available to you in that language. If you want to use a sample form in a non-English language, your system administrator must first set up that language in the inContact Portal.

Starting an Empty Form

- 1 In the Form Designer List toolbar, click **New Form**.
The **New Form** dialog box appears.



- 2 In the **New Form** dialog box, select the **Start an Empty Form** option.
The **Template Name** field is disabled.
- 3 In the **Form Name** text box, type a form name of up to 50 characters.
- 4 Type an optional description in the **Description** text box.
- 5 In the **Form Type** list, select the type of form to create.
- 6 Click **OK**.

A new form opens in the **General** tab of the Form Designer window. The form name corresponds to the text you entered in step 3. See the ["Form Designer Window"](#) on page 18.

NOTE

If you type a name that already exists in the database, the following error message is displayed: This name already exists.

Click **OK**, repeat step 3 above, and type a different form name.

- 7 Define the general form properties, as described in ["Defining the General Form Properties"](#) on page 35.

Creating a Form Based on a Template

- 1 In the Form Designer List toolbar, click **New Form**.
The **New Form** dialog box appears.
- 2 In the **New Form** dialog box, select the **Base on Template option** to inherit the layout and definitions defined in the template.
- 3 In the **Form Name** text box, type a form name of up to 50 characters.
- 4 From the **Template Name** list, select the template to base the form on.
To use one of the available sample forms, select Sample Form 1 or 2 from the **Template Name** list.
- 5 Type an optional description in the **Description** text box in the Form List.
- 6 In the **Form Type** list, select the type of form to create.
- 7 Click **OK**.

A new form based on the selected template opens in the **General** tab of the Form Designer window. The form name corresponds to the text you entered in step 3.

NOTE

If you type a name that already exists in the database, the following error message is displayed: This name already exists.

Click **OK**, repeat step 3 above, and type a different form name.

- 8 Define the general form properties, as described in ["Defining the General Form Properties"](#) on page 35.
- 9 Edit the form as required. See ["Editing Forms"](#) on page 103.
- 10 Click **Save** on the Toolbar. See ["Deleting a Form"](#) on page 113.
The form appears in the Form List.

Creating Form Templates

Create a form template when you need to design and create many forms with similar layouts and properties, and save all the properties common to these forms. To create a new form of the same kind, base it on your template to automatically inherit the form layout, style, scoring methods, question style, and so on.

You create a form template by the same procedure used to create a form and then assign the template status. Create the form template with only the properties that are common to several forms, and omit properties that are only relevant for a single instance of the form.

You can create a new template, or base the template on an existing template. Once you save a form as a template, you cannot change its type.

You can use one of the sample forms supplied with the Form Designer as the basis for a new form or template. If you are working in a non-English language, the sample forms are available to you in that language.



If you want to use a sample form in a non-English language, your system administrator must first set up that language in the Application Manager.

Creating a Form Template

- 1 In the Form Designer List toolbar, click **New Form**.
The New Form dialog box appears.
- 2 Do one of the following:
 - Start an empty form and add its components one at a time. See ["Starting an Empty Form"](#) on page 29.
 - Create a form based on a template, to inherit the layout and definitions defined in the template, and add, remove, and modify the form components as required. See ["Creating a Form Based on a Template"](#) on page 30.



If you select **Start an Empty Form**, the **Template Name** field is disabled.
The contents of linked forms is not available in Reports.

- 3 When you define General form properties, in the **Form Type** list, select **Template**. See ["Defining the General Form Properties"](#) on page 35.
- 4 Click **Save** on the toolbar. The form is saved in the Form List with the Template status.

Creating and Attaching Linked Forms

You create a linked form by the same procedure you use to create any form, and define the Form Type as Linked Form.

A linked form can be attached to a form question within a parent form, to provide an extra layer of questions related to the target question. For example, a question in the parent form can link to a set of questions in a linked form to collect additional data about an agent or a customer contact.

To create and attach a linked form, use the following procedures:

- [Creating a Linked Form](#), page 32
- [Attaching a Linked Form to a Question](#), page 33

Only published forms can be used as linked forms. However, once a form is already linked to a question in a parent form, hiding the linked form (that is, changing its status to hidden) does not automatically hide the form for questions that are already linked to this form. See ["Changing the Form Status"](#) on page 109 for more information on form status.

The linked form is hidden for any new questions that you want to add to the current form, or to any form, from the moment it is hidden.

In the current form, the hidden form is appended with the text label **Hidden**. This is only true in the Form Designer: The end user does not see the text label **Hidden**.

See ["Changing the Form Status"](#) on page 109, for more information on publishing a form.

WARNING

The components of linked form are not available in reporting. Only the score of the linked form is reported, because it is used as the question score in the parent form.

Linked Form Example

In this example, the parent form question has a linked form that contains a section and a category with two questions:

Parent Form Question: Was the agent friendly during the entire conversation?

Linked Form:

Section 1: Agent Friendliness

Category 1: Politeness Levels

Question 1: The agent answered all the customer's questions politely.

Question 2: The agent finished the conversation politely.

NOTE

When you create a linked form, some parts of the form are disabled, such as, headers, rules, and so on.

Creating a Linked Form

- 1 Create a new form. See ["Creating a New Form"](#) on page 28.
- 2 When ["Defining the General Form Properties"](#) on page 35, in the **Form Type** list, select **Linked Form**.
- 3 Click **Save** in the toolbar.
The form is saved in the Form List as a linked form.
- 4 To view linked forms in the Form List, from the Type list in the toolbar, select Linked Forms.
- 5 Publish the form to make it available to attach to another form. See ["Setting Form Status"](#) on page 108, for more information on publishing a form.

Attaching a Linked Form to a Question

- 1** Create the linked form. See “[Creating a Linked Form](#)” on page 32.
- 2** In the parent form, go to the question you want to add a linked form to.
- 3** In the **Question Type** list, select **Linked Form**.
You can only select this option when a linked form with the **Published** status exists in the Form List.
- 4** In the **Linked Form** list, select the required linked form.
- 5** Complete the other properties for the question and click **Save** in the toolbar.
The linked form appears attached to the question.

Defining Form Properties

This topic describes how to define form properties.

- [Defining the General Form Properties](#), page 35
- [Setting Up the Header](#), page 37
- [Setting Up the Footer](#), page 40

Defining the General Form Properties

You define the general form properties in the **General** form properties tab after you create a new form in the Form Designer window. General form properties are name, description, revision notes, form type, captions and default formatting for text in the form.

- 1 To change the name of the form, in the **Form Name** text box, edit the name you gave the form when you created it. The Form Name can have up to 50 characters.
- 2 In the **Description** text box, type a description of up to 500 characters for the form.

The description is visible in the in the Form Designer List and is not seen by users filling in the form.
- 3 In the **Revision Notes** text box, type a note of up to 500 characters for the version.

You can use the **Revision Notes** text box to indicate whether this is the original version or list the changes made for the new form version.
- 4 In the **Form Type** list, select one of the following form types:
 - **Evaluation:** The Evaluation form is used for agent evaluation in the Quality Monitoring application.
 - **Assessment:** The Assessment form is used for contact assessment in the Customer Xperience application.
 - **Template:** The Template is used to build other forms. See ["Creating Form Templates"](#) on page 30.
 - **Linked Form:** The Linked Form serves as a collection of components to provide an additional layer of questions for a question in a different form. See ["Creating and Attaching Linked Forms"](#) on page 31.
- 5 To hide the score from the user filling in the form, select the **Hide Score** check box.
- 6 To display the maximum achievable form score to the user filling in the form, select the **Display Maximum Form Score** check box.
- 7 To define the default style and properties of this form's components, click **Form Appearance Defaults**. You can override the styles later, when you design the individual components.
- 8 To change captions for Five Rank Lists and Yes/No questions, click **Change Captions**. For more information, see ["Captions for Five Rank Lists and Yes/No Questions"](#) on page 36.

Double Byte Languages

For double byte languages, such as Chinese, Japanese, and Korean, the number of characters in text fields is limited to half the maximum text length/field size.

For example, if an English caption is limited to 50 characters, the Japanese caption is limited to 25 characters.

For Form Designer, the Header, Footer, and component text fields are limited to the lengths listed in the table below.

	Single Byte Languages		Double Byte Languages	
	Name Length	Comment Length	Name Length	Comment Length
Header	50	300	25	150
Footer	50	600	25	300
Component (Question, Category, Section)	-	1024	-	512

Captions for Five Rank Lists and Yes/No Questions

The Form Designer has a default set of captions that appear in the Forms. The Change Captions functionality enables you to modify some of these captions to reflect the terminology used in your contact center.

Captions can be changed for the following question types only:

- Yes/No questions
- Five Rank Lists

To change the captions in a form:

1 Click **Change Captions**.

The Change Captions window appears. When opened for the first time, the Change Captions window appears with the captions' default values.

2 Change captions as required. To revert back to a caption's default value, click the **Revert** icon.

3 Click **Save**.

The new captions are saved for this form and will appear in all the form's filled evaluations and relevant reports.

NOTE



- Changing a Published or Hidden form's captions does not require the creation of a new form version.
- The caption of the optional Non Applicable (N/A) answer cannot be changed.
- Changing captions does not impact the captions of Shared Questions.

Setting Up the Header

Every form includes a header. The header holds information about the evaluation or assessment that is auxiliary to the form questions. When the form is filled in, the header displays the name of the person filling in the form, the name of the agent, and in the Quality Monitoring application, the name of the agent group being evaluated.

The form header can be designed to include form custom data selected from a predefined repository, as well as an instruction field, and a comment field. See ["Defining Form Custom Data"](#) on page 118, and ["Including Evaluation Custom Data \(ECD\)"](#) on page 119.

You can also determine whether the form header is collapsed or expanded by default.

You can perform the following tasks in the Header tab:

- [Defining the Header Name](#), page 38
- [Adding Custom Data to the Header](#), page 38
- [Selecting a Value for Custom Data in the Header](#), page 39
- [Setting the Header View in the Form](#), page 39
- [Adding Instructions to the Header](#), page 39

NOTE

The **Header** tab is disabled for linked forms.

Defining the Header Name

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Header** tab.
- 3 To change the default text for the **Header Name** field, type a new name.
The default header name is changed from **Details**. The **Header Name** can support up to 50 characters: Additional characters are not saved.
See ["Double Byte Languages"](#) on page 36.
- 4 Click **Save** in the toolbar.

Adding Custom Data to the Header

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 To add custom data to the form header, click **Add Evaluation Data**, above the Custom Data section of the header.
A new row appears in the Custom Data box. You can add up to two custom data fields.
- 3 From the list, select the name of the predefined custom data field to add to the header.
- 4 For each custom data, do one of the following:
 - If the **Default Value** field appears, type a value in the field.
 - If the **Values** button appears, select a value. See ["Selecting a Value for Custom Data in the Header"](#) on page 39.
- 5 To delete a custom data field from the list:
 - a. Click the check box to select the custom data.
 - b. Click **Delete CD**.
- 6 To change the order in which the fields appear in the header, use the up and down arrows above the box.
- 7 Click **Save** in the toolbar.

NOTE

If the custom data you selected is set to **Auto Populate**, only the default value from an external data source is enabled. See ["Defining Form Custom Data"](#) on page 118 and ["Including Evaluation Custom Data \(ECD\)"](#) on page 119 for more information.

Selecting a Value for Custom Data in the Header

- 1 Click **Values** to determine which values are available for selection.
The **Select Custom Data Answers** dialog box appears.
- 2 Select values from the **Available Values** list on the left and use the arrow buttons to move them to the **Selected Values** list on the right.
- 3 Use the up and down arrows to define the order in which the values appear within the list.
- 4 To include a default value for the custom data field in the header of the form, in the **Default Value** field, do one of the following:
 - Select a value from the default list that populates this field.
 - Click **Get Value...** to select a different data source to use to automatically populate the field
The field can be populated with data from the agent's profile, the user's profile, or the contact data.
- 5 Click **Save** in the toolbar.

Setting the Header View in the Form

- 1 In the Form Designer window, select the form's name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Header** tab.
- 3 To set the default for the header to appear collapsed when users fill in the form, select the **Collapse Header** check box.
- 4 To add a comment or notes box of up to 300 characters to the header, select the **Display Header Comments** check box.
The comment box is available to users filling in the form.
- 5 Click **Save** in the toolbar.

Adding Instructions to the Header

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Header** tab.
- 3 To add instructions of up to 1000 characters to the form header, type the text in the **Instructions** text box.
- 4 Use the formatting toolbar to configure the text appearance.
- 5 Click **Save** in the toolbar.

Setting Up the Footer

The footer appears at the end of the form. It is customarily used to provide a summary of the form, with two custom status fields, a rating field, and room for instructions and optional comment text of up to 600 characters.

When the form is filled in, the default title for the footer is Summary.

NOTE

The **Footer** tab is disabled for linked forms.

If one or two status fields are included in the footer, these fields are also available when the user fills in the form. The status fields have predefined values for selection, displayed in a drop-down list. The status field names can be customized per system. For example, you can have a Discussion status with a list of values such as, To be discussed with the manager, To be discussed with the head of department, and so on.

A rating field is always included in the form footer, and is used to display a verbal translation of the calculated score when the form is filled in (for example, 80 points = Very Good). The name of the rating field can be customized per system.

You can perform the following tasks for the form footer:

- [Defining the Footer Name](#), page 40
- [Adding a Status Field to the Footer](#), page 41
- [Selecting the Rating Set](#), page 41
- [Setting the Footer View in the Form](#), page 41
- [Adding Instructions to the Footer](#), page 42

Defining the Footer Name

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Footer** tab.
- 3 To change the default text for the **Footer Name** field, type a new name in the field.
The default header name is changed from **Summary**. The Footer field can support up to 50 characters: Additional characters are not saved. See "[Double Byte Languages](#)" on page 36.
Up to two predefined status fields can be added to the footer.
- 4 Click **Save** in the toolbar.

Adding a Status Field to the Footer

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Footer** tab.
- 3 Select a Status field check box.
Available Values appears.
- 4 Click **Available Values** to determine which values are available for selection.
The **Values** dialog box opens.
- 5 Select values from the **Available Values** list on the left and use the arrow buttons to move them to the **Selected Values** list on the right.
- 6 Use the up and down arrows to define the order in which the values appear within the list.
- 7 To include a default value in the status field in footer of the form, select a value from the **Default Value** list at the bottom of the **Values** dialog box.
- 8 Click **OK**.
The **Values** dialog box closes.
- 9 Click **Save** in the toolbar.

Selecting the Rating Set

A rating is a verbal translation of the achieved score based on the form calculation.

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Footer** tab.
- 3 Select a Rating Set for the form from the list.
- 4 Click **Save** in the toolbar.

Setting the Footer View in the Form

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Footer** tab.
- 3 To set the default for the footer to appear collapsed when users fill in the form, select the **Collapse Footer** check box.
- 4 To add a comment or note box of up to 600 characters to the footer, select the **Display Footer Comments** check box.
This comment is unique in that its content can be used as a criterion when searching for evaluations and assessments.

- 5 Click **Save** in the toolbar.

Adding Instructions to the Footer

- 1 In the Form Designer window, select the form name in the navigation tree. The Form Properties pane is displayed on the right.
- 2 Click the **Footer** tab.
- 3 To add instruction text of up to 1000 characters to the form footer, type the instructions in the **Instructions** test box,
- 4 Use the formatting toolbar to configure the text appearance.
- 5 Click **Save** in the toolbar.

Creating Form Components

This topic describes how to create form components and define their properties.

- [Creating Form Components](#), page 44
- [Defining Properties for a Section or Category](#), page 45
- [Question Types](#), page 48
- [Defining Properties for a Question](#), page 50
- [Setting Question Scoring Parameters](#), page 54
- [Duplicating Form Components](#), page 58
- [Adding Shared Form Components](#), page 58

Creating Form Components

You create the structure of your form in the navigation tree by adding sections, categories, and questions, and defining the properties for each component. See [“Main Form Component Hierarchy”](#) on page 24, for more information about form structure and hierarchy.

- 1 In the navigation tree in the Form Designer window, select the component under which you want the new component to appear, and do one of the following:
 - Click **New Component**.
 - Right-click a component and select the new component from the list.

The new component is created as follows:

- When the form name is selected, a new section is created.
 - When a section is selected, a new category is created.
 - When a category is selected, a new question is created.
- 2 To define component properties, in the navigation tree, click the new component. The Properties window opens in the right pane.
 - 3 Do one of the following:
 - [“Defining Properties for a Section or Category”](#) on page 45
 - [“Defining Properties for a Question”](#) on page 50



WARNING Editing a form component can cause a new form version to be created. You need to understand the impact of modifying forms/form components on new form versions and reports before you update form components.

If you are unsure of the impact of creating a new form version, we recommend that you create a new form with a new name.

See [Chapter 11 “Impact of Modifying Components on New Form Versions and Reports”](#).

Defining Properties for a Section or Category

You create a section or category and define its properties by completing the following tasks in the Section or Category Properties pane:

- [Defining a Section or Category Name](#), page 46: Specifies the name of the section or category, as it appears in the form.
- [Defining Scoring Parameters for a Section or Category](#), page 46: Determines how the score is calculated for the section or category
- [Defining Views for Sections or Categories](#), page 47: Defines whether instruction and comment fields are displayed, whether the score is displayed when a user fills in the form, and whether the component is collapsed or hidden by default.
- [Defining Instructions for Sections or Categories](#), page 47: Provides optional instructions to display for the component when a user fills in the form.
- [Instruction Text Formatting](#), page 48: Provides information on how font selection affects the visibility of the instructions for sections or categories.

Section Properties

The screenshot shows the 'Section Properties' pane. At the top is a blue header bar containing icons for Save, Undo, Redo, Find, Print, ABC, and Help, along with a 'Back To List' button. Below the header, the 'Name' field is set to 'Section 1'. The 'Scoring Method' is set to 'Category Percentage'. The 'Base Percentage' is '0' and the 'Precision' is 'x.xx'. Under the 'View' section, the checkboxes for 'Collapse Section' and 'Hide Section' are checked, while 'Hide Score' and 'Enable Comment' are unchecked. The 'Instructions' section features a rich text editor with a toolbar and a large text area.

Category Properties

The screenshot shows the 'Category Properties' dialog box. The 'Name' field is set to 'Category 1'. The 'Scoring Method' dropdown menu is open, showing options: 'None', 'Question Sum', 'Question Average', 'Question Percentage', and 'None'. The 'Precision' is set to 'x.xx'. The 'Baseline Score' and 'Minimum Score' are both set to '0'. The 'View' section has checkboxes for 'Hide Score', 'Enable Comment', 'Collapse Category' (which is checked), and 'Hide Category'. The 'Instructions' field is empty with a rich text editor toolbar above it.

Defining a Section or Category Name

- 1 In the navigation tree of the Form Designer window, select an existing section or category, or create a new one. See ["Creating Form Components"](#) on page 44. The Category or Section Properties window is displayed on the right.
- 2 Do one of the following:
 - For a new section or category, enter the name in the **Name** field (50 characters).
 - For an existing section or category, edit the property fields as required.
- 3 Click **Save** in the toolbar.

Defining Scoring Parameters for a Section or Category

- 1 In the navigation tree of the Form Designer window, select an existing section or category, or create a new one. See ["Creating Form Components"](#) on page 44. The Category or Section Properties window is displayed on the right.
- 2 In the **Scoring Method** list, select the desired scoring method. See [Chapter 7 "Form Scoring Methods"](#) for information on scoring.
- 3 If a percentage scoring method is selected in the **Scoring Method** list, set the **Base Percentage**. See ["Passing Scores"](#) on page 65.

- 4 Select the **Precision** for the form from the list. The default precision is three significant digits, expressed to two places after the decimal point (x.xx). See “[Score Precision](#)” on page 65.
- 5 Set the **Baseline Score** (optional) for the section. The baseline is a positive or negative value that is added to, or subtracted from, the form’s score. See “[Baseline Scores](#)” on page 64.
- 6 Set the **Minimum Score** (optional) for the section. The minimum score prevents the form’s score from reaching a score lower than this value. See “[Minimum Scores](#)” on page 63.
- 7 Click **Save** in the toolbar.

Defining Views for Sections or Categories

- 1 In the navigation tree of the Form Designer window, select an existing section or category, or create a new one. See “[Creating Form Components](#)” on page 44.
The Category or Section Properties window is displayed on the right.
- 2 In the **View** field, select one of the following:
 - **Hide Score**: Hides the component score when a user fills in the form.
 - **Enable Comment**: Makes a comment box of up to 1024 characters available in the component title when a user fills in the form. Additional characters are not saved.
 - **Collapse Section/Collapse Category**: Causes the component to appear collapsed by default when filling in the form.
 - **Hide Section/Hide Category**: Hides the component by default when a user fills in the form. This option is relevant when you set up rules that display the component based on an answer to one of the questions, or based on a value in one of the form custom data fields.
- 3 Click **Save** in the toolbar.

Defining Instructions for Sections or Categories

- 1 In the navigation tree of the Form Designer window, select an existing section or category, or create a new one. See “[Creating Form Components](#)” on page 44.
The Category or Section Properties window is displayed on the right.
- 2 To add instruction text to appear in the form section or category when the user fills in the form, in the **Instructions** text box, type text of up to 1000 characters.
- 3 To format the text, in the **Instructions** text box, use the formatting toolbar.
If you don’t make any changes, the form uses the default formatting, as defined by the System Administrator.
- 4 Click **Save** in the toolbar.

Instruction Text Formatting

If you set your own font style for the section, category and question instruction fields, the text appears according to the font style you selected.

However, if you click **Font** again, the selected style does not appear in the relevant fields in the font dialog box, but rather shows the default font style of the form designer.

Depending on the font size used for instructions and the length of the instructions, the text may be cut off when viewing the form.

With the default font, three rows of text is displayed. To view the full instructions in a pop up window, the user can click the instructions.

Question Types

As described in [Chapter 3 “Typical Form Layout”](#), questions are the basic structural components in a form. Questions are grouped into categories, which are, in turn, grouped into sections.

The following table describes the types of questions you can create and include in a form.

Question Type	Description
Yes/No	- Yes/No questions are most suitable for questions with two possible responses. - The default captions are Yes and No. The captions can be changed using the Change Captions button in the form's General tab (see "Captions for Five Rank Lists and Yes/No Questions" on page 36). - Each answer has a configurable score. For example, Yes can be set to award 10 points, and No can be configured to deduct 5 points. - There is an optional Non Applicable (N/A) answer. The N/A caption cannot be changed. - When the Null check box is selected, the score field is disabled and the question is not scored. - If the question is not answered, it is defined as Null. See "Setting Up Yes/No Parameters" on page 55.
Five Rank List	- Five rank lists are suitable for questions with five possible ranked answers. Each response has a configurable score. - The default captions are Excellent, Good, Average, Fair, and Poor. The captions can be changed using the Change Captions button in the form's General tab (see "Captions for Five Rank Lists and Yes/No Questions" on page 36). - There is an optional Non Applicable (N/A) answer. The N/A caption cannot be changed. - When the Null check box is selected, the score field is disabled and the question is not scored. If the question is not answered, it is defined as Null. - This type of question is most suitable for forms created in previous application versions (for example, ULTRA 9.X), because it fully corresponds to the Custom Scored Questions from those versions. See "Setting Up Five Rank List Parameters" on page 55.
Custom Scored List	- Custom scored lists are suitable for questions with up to ten possible answers. - The answers can be configured to appear as radio buttons or as a drop-down list. - Each answer is assigned a corresponding score. - When the Null check box is selected, the score field is disabled and the question is not scored. - To create a form that is easier to read and use, we recommend that you use a drop-down list instead of radio buttons for questions that have more than five answers. See "Setting Up Custom Scored List Parameters" on page 55.

Question Type	Description
Text List	- Text lists are suitable for questions with a verbal answer that do not award or deduct any points, for example, questions that are primarily used to collect data. - The list of textual answers is fully configurable. Each answer can support up to 100 characters. - The answers can appear as a list, a drop-down list, or as list that supports free text. - Users can select multiple answers from the list. See "Setting Up Text List Parameters" on page 56.
Numeric Range	- Numeric ranges are suitable for questions with a numeric value. - This kind of question can be used for data collection (for example, to record the dollar value of a sale), or to award or deduct points. See "Setting Up Numeric Range Parameters" on page 56.
Text	- Text answers are suitable for questions with a single verbal answer that do not award or deduct points from the form score. For example, questions that are primarily used to collect data. - The answer appears as an empty text field with no predefined answers and no default answer. - You can see the full question text in the tool tip: To display the entire question text in the form, you must enter a hard return after every 255 characters. See "Setting Up Text Field Parameters" on page 57.
Linked Form	- Linked forms are attached to questions to provide an extra level of questions. - To add a linked form to a question, the linked form must be present in the Form List. To check for a linked form in the Form List, see "Sorting and Filtering the Form List" on page 102. - To create a linked form, see "Creating and Attaching Linked Forms" on page 31. See "Setting Up a Linked Form" on page 57.

Defining Properties for a Question

You create a question and define its properties by completing the following tasks in the Question Properties pane:

- [Defining Question Text](#), page 51: Defines the question and how it appears in the form.
- [Defining Question Type](#), page 52: Defines the type of question to add to the form.
- [Defining Question Scores](#), page 52: Defines the parameters to calculate the question score.
- [Defining Options for Question Appearance](#), page 52: Defines whether instruction and comment fields are displayed, whether the question is marked as mandatory, and whether the question is hidden by default.
- [Including a Reason](#), page 53: Makes it possible to add a reason to the question when shared data is enabled.
- [Defining Instructions for Questions](#), page 54: Provides optional text to appear when the form is filled in.

Question Properties

Question Properties

Question Text: Question 1

Question Type: Five Rank List | Baseline Score: 0 | Minimum Score: 0

Scores:

Exc.	Good	Avg.	Fair	Poor	N/A
5	4	3	2	1	☒
☐ Null	☐ Null	☐ Null	☐ Null	☐ Null	☒ Null

Default Value: [Dropdown]

Options:

- ☐ Hide Score
- ☐ Mandatory
- ☐ Enable Comment
- ☐ Hide Question
- ☒ Display question above answers
- ☐ Instructions appear above question

Instructions: [Empty text area]

Defining Question Text

- 1 In the navigation tree of the Form Designer window, select an existing question or create a new question. See ["Creating Form Components"](#) on page 44.
The Question Properties pane is displayed to the right of the screen.
- 2 Do one of the following:
 - For a new question, enter the question in the Question Text field (255 characters).
 - For an existing question, edit the question text as required.
- 3 Use the formatting toolbar to set the font, size, and formatting for the question text.
Although you can view the question in the tool tip, for the question to appear in its entirety in the form, you must enter a hard return after every 255 characters.

- 4 Click **Save** in the toolbar.

Defining Question Type

- 1 In the navigation tree of the Form Designer window, select an existing question or create a new question. See ["Creating Form Components"](#) on page 44.
The Question Properties pane is displayed to the right of the screen.
- 2 In the **Question Type** list, select the type of question to include. See ["Question Types"](#) on page 48 for descriptions of each question type and ["Setting Question Scoring Parameters"](#) on page 54 for information on how to set up the question type.
- 3 Click **Save** in the toolbar.

Defining Question Scores

- 1 In the navigation tree of the Form Designer window, select an existing question or create a new question. See ["Creating Form Components"](#) on page 44.
The Question Properties pane is displayed to the right of the screen. See ["Form Scoring Methods"](#) on page 60 for information on scoring.
- 2 Set the **Baseline Score** (optional) for the question. The baseline is a positive or negative value that is added to or subtracted from the form's score. See ["Baseline Scores"](#) on page 64.
- 3 Set the **Minimum Score** (optional) for the question. The Minimum Score prevents the form's score from reaching a score lower than this value. See ["Minimum Scores"](#) on page 63.
- 4 In the **Scores** field, define the questions available answers, corresponding scores, and if relevant, the question's default answer. This differs for each type of question. See ["Setting Question Scoring Parameters"](#) on page 54 for information on how to set the scoring parameters for each question type.
- 5 Click **Save** in the toolbar.

Defining Options for Question Appearance

- 1 In the navigation tree of the Form Designer window, select an existing question or create a new question. See ["Creating Form Components"](#) on page 44.
The Question Properties pane is displayed to the right of the screen.
- 2 In the **Options** field, select any of the following options for the questions:
 - **Hide Score:** Hides the score when the user fills in the form.
By default, scores appear next to the question in the form. Scores for text list and text questions do not appear next to the question on the form.

- **Mandatory:** Marks the question as mandatory.

Forms cannot be submitted unless all mandatory questions have been answered.

For a mandatory question that is a component of a visibility rule (for example, if the mandatory question is hidden or disabled), the form can still be calculated and submitted, even if the mandatory question is not answered.

- **Enable Comment:** Makes a comment box of up to 1024 characters available in the question when the user fills in the form.
- **Hide Question:** Hides the question when the user fills in the form.

This option is relevant when you set up rules to display the question based on an answer to one of the questions, or based on a value in one of the form custom data fields.

- **Display Question Above Answers:** Displays the complete question text above the answers.

Clearing the **Display question above answers** check box displays the question to the left of the answers and limits the question text to three rows. The **Display question above answers** check box is checked by default.

- **Instructions Appear Above Question:** Displays the instructions above the question in the form. This is useful when the instructions should be read before the question.
- **Enable Reason:** Displays a reason list for the question when the user fills in the form. The **Enable Reason** option is displayed when reasons exist in the shared data in the Form Designer Library. See ["Including a Reason"](#) on page 53.

- 3 Click **Save** in the toolbar.

Including a Reason

Reasons allow you to indicate why a specific answer was selected. In the inContact Reports application, you can use the Average Evaluation Score per Reason report to help identify the reasons that drive high or low scores. See the *Reports User Guide*.

- 1 To include a reason for an answer, in the navigation tree of the Form Designer window, select an existing question or create a new question. See ["Creating Form Components"](#) on page 44.

The Question Properties pane is displayed to the right of the screen.

- 2 In the **Options** field, select the **Enable Reason** option to display a reason list when the user fills in the form.

Display Reasons is activated.

- 3 Click **Display Reasons** to open the **Select Reasons** dialog box.
- 4 In the **Select Reasons** dialog box, select the reason you want to include from the **Values For Reasons** list.
- 5 Click **OK**.
- 6 Click **Save** in the toolbar.

See ["Defining Form Reason Fields"](#) on page 125 for more information.

Defining Instructions for Questions

- 1 In the navigation tree of the Form Designer window, select an existing question or create a new question. See ["Creating Form Components"](#) on page 44.
The Question Properties pane is displayed to the right of the screen.
- 2 To add an instruction to appear in the form question, in the **Instructions** text box, type instruction text of up to 1000 characters.
- 3 Use the formatting toolbar to format the appearance of the instruction text. If you don't make any changes, the form uses the default formatting, as defined by the System Administrator.
- 4 Click **Save** in the toolbar.

Setting Question Scoring Parameters

You can set the scoring parameters for each question type, with the following exceptions: No scores are awarded for text list, numeric range, and text questions.

For some questions, there is also an appearance option, or a default answer.

See ["Defining Question Scores"](#) on page 52 for more information.

The following guidelines describe how to set up the different parameters for each question type.

- 1 In the navigation tree of the Form Designer window, select an existing question or create a new question. See ["Creating Form Components"](#) on page 44.
The Question Properties pane is displayed to the right of the screen.
- 2 In the **Question Type** field, do one of the following to define the questions available answers, corresponding scores, and, if relevant, the question's default answer:
 - [Setting Up Yes/No Parameters](#), page 55
 - [Setting Up Five Rank List Parameters](#), page 55
 - [Setting Up Custom Scored List Parameters](#), page 55
 - [Setting Up Numeric Range Parameters](#), page 56
 - [Setting Up Text Field Parameters](#), page 57
 - [Setting Up a Linked Form](#), page 57

Setting Up Yes/No Parameters

- 1 In the **Question Type** field, select the **Yes/No** option.
- 2 Set the baseline and minimum scores for the question.
- 3 In the **Scores** field, assign a score for each answer.
- 4 To enable the Non Applicable (N/A) answer when the user fills in the form, select the **N/A** check box and type a score for the answer (including zero).
Verify that the **Null** check box is not selected.
- 5 To disable the **Value** field for any answer, select the **Null** check box.
The answer is omitted from the question scoring.
- 6 To set a default answer for the most likely response and save time when the user fills in the form, select a default answer from the **Default Value** list.

Setting Up Five Rank List Parameters

- 1 In the **Question Type** field, select the **Five Rank List** option, and set the baseline and minimum scores for the question.
- 2 In the **Score** field, assign a score to each rank.
- 3 To enable the Non Applicable (N/A) answer when the user fills in the form, select the **N/A** check box and type a score for the answer (including zero).
Verify that the **Null** check box is not selected.
- 4 To disable the **Value** field for any answer, select the **Null** check box.
The answer is omitted from the question scoring.
- 5 To set a default answer for the most likely response and save time when the user fills in the form, select a default answer in the **Default Value** field list.

Setting Up Custom Scored List Parameters

- 1 In the **Question Type** field, select the **Custom Scored List** option and set the baseline and minimum scores for the question.
- 2 To add answer text to the list, in the **Scores** field of the table, click **Add** next to the table.
- 3 In the **Caption** column, type the answer text.
- 4 In the **Value** field, enter a score for each answer.
- 5 To disable the **Value** field, in the **Set Null** column, select the check box.
The answer is not calculated in the score.
- 6 To sort the answers by in ascending or descending order, select the column and click to display the up or down arrow in the column title.
- 7 To define how the answers are displayed in the form, select one of following options:

- List
 - Options List
 - Drop-down List
- 8 To delete an answer from the list, select the answer caption and click **Delete** next to the **Caption Editor**.
 - 9 To set a default answer for the most likely response and to save time when the user fills in the form, select a default answer in the **Default Value** field list.

Setting Up Text List Parameters

No scores are awarded for this type of question.

- 1 In the **Question Type** field, select the **Text List** option.
- 2 To add answer text to the list, in the **Scores** field, in the **Caption Editor**, click **Add** next to the **Caption Editor**.
- 3 In the **Caption** column, type the answer text.
- 4 To define how the answers are displayed in the form, select one of following options:
 - List
 - Options list
 - Drop-down list
 - Drop-down list with the ability to type text
- 5 To delete an answer from the list, select the answer caption and click **Delete** next to the **Caption Editor**.
Delete is enabled after the first time you select **Add** to add answer caption text.
- 6 To set a default answer for the most likely response and to save time when the user fills in the form, select a default answer in the **Default Value** field list.

Setting Up Numeric Range Parameters

This type of question can be configured to only collect data, with the scoring options disabled.

- 1 In the **Question Type** field, select the **Numeric Range** option and set the baseline and minimum scores for the question.
- 2 In the **Scores** field, in the **Range** field, enter the values for the range in the **From** and **To** fields.
- 3 To set a default answer for the most likely response and to save time when the user fills in the form, in the **Default Value** field list, do one of the following:
 - Select **None**.
 - Select **Default Value** and enter a value in the text box field.

Setting Up Text Field Parameters

In the **Question Type** field, select the **Text** option.

When the user fills in the form, a text box appears under the question text.

No scores are awarded for this type of question.

Textual fields in a form are:

- Comments
- Captions
- Section or category names and instructions
- Question texts and instructions.
- Revision notes and header and footer instructions in form-level fields.

Setting Up a Linked Form

You can attach a linked form to a question in a parent form. The linked form contains sections, categories, and questions to provide an extra layer of information.

The score of the linked form becomes the question score in the parent form, and affects the overall score for the parent form. See ["Creating and Attaching Linked Forms"](#) on page 31 for more information.

- 1 In the **Question Type** list, select the **Linked Form** option.

You can only select this option when a linked form with the **Published** status exists in the Form List.

- 2 In the **Linked Form** list, select the required linked form.

WARNING



The components of linked form are not available in reporting. Only the score of the linked form is reported, because it is used as the question score in the parent form.

Duplicating Form Components

You can use the Form Designer to duplicate any section, category, or question that already exists in a form. You can use the duplicated component and format information and edit it, instead of designing a new component.

- 1 In the navigation tree in the Form Designer window, select the component to duplicate and do one of the following:
 - In the toolbar of the left pane, click **Duplicate**.
 - Right-click the component and select **Duplicate**.

The navigation tree expands to display the duplicated component. The duplicated component is numbered to differentiate it from the original component.

- 2 Click **Save** in the toolbar.

Adding Shared Form Components

When you design a form, you can create new components (sections, categories, or questions) or reuse shared components.

Shared components are entire sections, categories, or questions with configured values and properties that are specifically created and saved for reuse in other forms. For example, if you create a generic **Start** section, you can save it and reuse it in other forms.

Using shared components across many forms helps you maintain consistency and saves time by reducing the need to create duplicate information.

Each shared component can appear once in a form. If you try to add the same shared component to a form more than once, the following message is displayed: **This shared component already appears in the form.**

To add the following shared form components to a form, use the following procedures:

- [Adding a Shared Section](#), page 58
- [Adding a Shared Category](#), page 59
- [Adding a Shared Question](#), page 59

See “[Creating Shared Components](#)” on page 126 to learn how to create shared components

Adding a Shared Section

- 1 In the navigation tree of the Form Designer window, select the form name.
- 2 Do one of the following:
 - Click **Add Shared Component**.
 - Right-click the selected component and select **Share**.

- 3 The **Shared Component Selector** dialog opens with the **Shared Sections** tab open.
 - 4 Select a shared section from the list and edit the **Name**, **Recommended Scores**, and **Description** fields.
 - 5 Click **OK**.
- The shared section appears in the navigation tree. Some of the properties for the section appear in the form as read-only fields.

Adding a Shared Category

- 1 In the navigation tree of the Form Designer window, select the section you want the shared category to appear in.
 - 2 Do one of the following:
 - Click **Add Shared Component**.
 - Right-click the selected component and select **Share**.
- The **Shared Component Selector** dialog box opens with the **Shared Categories** tab open.
- 3 Select a shared category from the list and edit the **Name**, **Recommended Scores**, and **Description** fields.
 - 4 Click **OK**.
- The shared category appears in the navigation tree. Some of the properties for the shared category appear in the form as read-only fields.

Adding a Shared Question

- 1 In the navigation tree of the Form Designer window, select the category you want the shared question to appear in.
 - 2 Do one of the following:
 - Click **Add Shared Component**.
 - Right-click the selected component and select **Share**.
- The **Shared Component Selector** dialog box opens with the **Shared Questions** tab open.
- 3 Select a shared question from the list and edit the **Shared Question** text, **Recommended Scores**, and **Scores** table fields. You can change the order of the values in each column of the **Scores** table by clicking the column name.
 - 4 Click **OK**.
- The shared question appears in the navigation tree. Some of the properties for the shared question appear in the form as read-only fields.



Changing a form's captions for Yes/No questions or Five Rank Lists, does not impact the captions of Shared Questions.

Form Scoring Methods

This topic describes form scoring.

- [Scoring Methods](#), page 61
- [Scoring Options](#), page 63
- [Defining Form Calculations](#), page 67
- [Defining Component Scoring](#), page 71
- [Maximum Possible Score](#), page 71

Scoring Methods

Part of creating a form is determining how its score is calculated. The Form Designer enables full flexibility in setting the score of each question, and in determining the scoring calculation method for form sections, categories, questions, and the entire form. Furthermore, rules can be applied to each component's score which further affect what the final score is. See "[Scoring Rules Overview](#)" on page 94 for more details.

To perform scoring calculations, at least one question must be answered with a non-null value. A null value is applied to a component when one of the following conditions is true:

- A question is not answered
- A component is answered N/A (Not Applicable)
- An answer is selected from a custom text list
- The value for the selected answer is set to null

The following table describes the scoring methods that can be assigned to forms, sections, and categories. The default for the **Scoring Method** field is **None**.

Scoring Method	Description
Sum	This is the simplest calculation method: It totals the scores of the selected component by addition.
Average	This calculation method adds the scores of the selected component and divides that score by the number of components that have a non-null score value.
Percentage	This calculation method uses several steps to present the component score relative to the maximum possible score. 1 To derive a relative score in the form of a fraction, the component score is divided by the maximum score that can be attained for that component (Max Possible Score). 2 To convert the fraction into a score that can be used to calculate the total score, the fraction is multiplied by a base percentage value.
None	Default scoring method. This scoring option is used when there is no need to calculate a score for a specific component. When it is selected, no score appears for the section or category. This scoring option is relevant for sections or categories composed of textual questions that are not scored.

The graphic below presents the options for the Scoring Method fields for a category.

The screenshot displays the 'Max Poss Scores (Yael)' window. On the left, a tree view shows the hierarchy: Section1, Category1, Category2, Category3, Section2, Category1_1, Question1_3, Question2_3, Category2_1, Category3_1, and Section3. The main panel is for 'Category1_1'. It includes a 'Name' field with 'Category1_1', a 'Scoring Method' dropdown menu (currently showing 'None' with a list of options: 'None', 'Question Sum', 'Question Average', 'Question Percentage'), a 'Precision' dropdown set to 'X.XX', 'Baseline Score' and 'Minimum Score' fields both set to '0', and a 'View' section with checkboxes for 'Hide Score', 'Enable Comment', 'Collapse Category', and 'Hide Category'. At the bottom is an 'Instructions' text area with a rich text editor toolbar.

The following table summarizes the scoring methods available for each component type.

Entity	Sum	Average	Percentage
Form	Sum of: - Questions - Categories - Sections	Average of: - Questions - Categories - Sections	Percentage of: - Questions - Categories - Sections
Section	Sum of: - Questions in section - Categories in section	Average of: - Questions in section - Categories in section	Percentage of: - Questions in section - Categories in section
Category	Sum of questions in category	Average of questions in category	Percentage of questions in category

Scoring Options

You can define the following options for forms and all form components:

- [Minimum Scores](#), page 63
- [Baseline Scores](#), page 64

The following scoring options are relevant for specific form elements:

- You can define the precision for forms, sections, and categories. Questions do not have precision settings or base percentage scores. See "[Score Precision](#)" on page 65.
- You can define passing scores for forms. See "[Passing Scores](#)" on page 65.
- You can define a base percentage score for forms, sections, and categories when the selected Scoring Method is a percentage-based calculation. See "[Base Percentage](#)" on page 65.
- Negative scores can be included when you use the percentage calculation method, thus the component's minimum score can be less than 0 when this method is used. Select the **Allow Negative Score** option to enable scores less than 0. See "[Allowing Negative Scores](#)" on page 70 for more information.
- For all scoring methods, if all questions in the category, section, or form receive the Null value, the entire category, section, or form score is Null.

In this case, all baselines and minimum scores are ignored, and the category, section, or form does not receive a score.

Minimum Scores

Categories, sections, and forms can (optionally) be assigned minimum scores that are used only after the form's score is calculated. Minimum scores prevent a component's or form's score from reaching a score lower than the minimum score defined. If a component's score is calculated to be X, if X is lower than the minimum score defined for that component, the component's/form's score is set equal to the minimum score instead.

Minimum scores only take effect when at least one question in the category or section is answered with a non-null answer (that is, an answer that affects the score).

The screenshot shows the 'Test_18Aug' project in the left sidebar. The main area displays the configuration for 'Question 1'. The 'Question Text' field contains 'Question 1'. The 'Question Type' is set to 'Yes/No'. The 'Baseline Score' is 0. The 'Minimum Score' is 5.00, which is highlighted with a red box. The 'Scores' section shows 'Yes' with a score of 1.25, 'No' with a score of 0, and 'N/A' checked. There are also checkboxes for 'Null' and a 'Default Value' dropdown.

Baseline Scores

Categories, sections, and forms can (optionally) have assigned baseline scores. A baseline value is a positive or negative integer that is added to the component score.

Baselines values can be used to give bonus scores, regardless of the actual answer: For example, to reward and emphasize special behavior.

Baselines only take effect when at least one question in the category or section is answered with a non-null answer: That is, an answer that affects the score.

The screenshot shows the 'Max Score Test' project in the left sidebar. The main area displays the configuration for 'Question1'. The 'Question Text' field contains 'Question1'. The 'Question Type' is set to 'Yes/No'. The 'Baseline Score' is 60.00, which is highlighted with a red box. The 'Minimum Score' is 0. The 'Scores' section shows 'Yes' with a score of 1.25, 'No' with a score of 0, and 'N/A' checked. There are also checkboxes for 'Null' and a 'Default Value' dropdown.

The following examples demonstrate how baseline scores are used:

- **Example 1:** A question has a baseline of 20 and scores 10 points. For this question, the final score is 30.
- **Example 2:** A category that includes several questions is assigned a baseline of 100.

The following rules are set for category scoring:

- Questions with a **No** response reduce the category's score by 5 points.
- Questions with a **Yes** response do not change the category's score.

If question 1 is answered No, the category score is $(100 + (0 - 5)) = 95$.

If question 2 is answered Yes, the category score is $(95 - 0) = 95$.

Score Precision

You define how many decimal places are displayed for scores by setting the precision for forms, sections, and categories. The default precision is three significant digits, expressed to two places after the decimal point (x.xx).

You have the option to configure the decimal precision to one of the following settings:

- **x:** No decimal place, for example, 10
- **x.x:** One decimal place, for example, 10.3
- **x.xx:** Two decimal places, for example, 10.25

For example, if the score is 2.5467782, when the precision is set to two decimal places (x.xx), the score is displayed as 2.55.

Passing Scores

You can assign a passing score to a form. A passing score is a numeric value that provides a means of assessing if a form has passed the given score. The passing score does not appear when the user fills in the form: The passing score is used only as a parameter for reports.

Base Percentage

When you select a percentage type scoring method, you can set a base percentage for a form, section, or category. The percentage calculation method involves dividing the component's score by the maximum score that can be attained for that component (Maximum Possible Score), to derive a relative score in the form of a fraction. This fraction is then multiplied by a value, called a base percentage.

Multiplying by the base percentage converts the fraction into a score that can be used to calculate the total score, even when different calculation methods are used for other form components. See "[Maximum Possible Score](#)" on page 71.

$$\frac{\text{Sum of Attained Scores}}{\text{Sum of Maximum Possible Scores}} \times \text{Base Percentage} = \text{Actual Score (percentage)}$$

If you have enabled negative scores in the **Calculations** tab, when you select one of the following percentage scoring methods, you can set a negative value for the **Base Percentage** (see [“Allowing Negative Scores”](#) on page 70 for more information):

- Section Percentage
- Category Percentage
- Question Percentage

The following examples demonstrate how base percentage scores are used:

Base Percentage Scoring Example 1

Consider a form with two sections, where each section uses the Question Percentage scoring method. The first section contains the following two questions:

- Question 1 scores 10 out of 10
- Question 2 scores 5 out of 10

The score for the section is calculated by adding the question scores and dividing by the total:

$$\frac{(10 + 5)}{20} = 0.75$$

Expressed as a percentage, this section scored 75% of the maximum possible score. To express this percentage as a value that is relative to the rest of the form, multiply by a base percentage.

Because the form has two sections, you can choose to set the base percentage for each section to 50%. This weights each section score evenly and makes it simple to derive a percentage score for each section, because the maximum score for the form is 100.

Therefore, The first section's score, relative to the whole form is (0.75 X 50=37.5).

Base Percentage Scoring Example 2

Consider a form that uses the Section Percentage Scoring Method, with the Base Percentage set to 100. The form contains three sections, where each section uses a different scoring method, as follows:

- Section A uses the category sum method
- Section B uses the question average method
- Section C uses the question percentage method

If all questions are answered correctly, or assigned the maximum points, the maximum score that can be achieved for the entire form (Max Possible Score) is 100.

Therefore, if section A is set to have a maximum score of 30, and Section B is set to have a maximum score of 40, to attain 100 for the entire form, the base percentage for Section C must be 30.

Defining Form Calculations

You assign the scoring method and scoring parameters for the whole form. A form can use a section, category, or question-based scoring method. You define the scoring for a form by doing the following in the **Calculations** tab:

- [Defining the Form Scoring Method](#), page 68
- [Setting the Maximum Score for the Form](#), page 68
- [Setting the Minimum Score for the Form](#), page 69
- [Setting the Baseline Score for the Form](#), page 69
- [Setting the Passing Score for the Form](#), page 70
- [Setting the Precision for the Form Score](#), page 70
- [Allowing Negative Scores](#), page 70

Calculations Tab

The screenshot displays the 'Calculations' tab in the inContact Quality Monitoring Form Designer. On the left, a tree view shows the form structure for 'Test_18Aug', including sections (Section2, Section3, Section1) and their respective categories and questions. On the right, the 'Calculations' tab is active, showing the following settings:

- Scoring Method:** None (dropdown menu)
- Max Score:** 0 (text input) with an 'Update Max Score' button
- Minimum Score:** 0 (text input)
- Baseline Score:** (text input)
- Passing Score:** (text input)
- Precision:** x.xx (dropdown menu)
- Allow Negative Score:** ☐
- Include Set Value rules in percentage calculation:** ☐
- Include Increase / Decrease rules in percentage calculation:** ☒



As a best practice, we recommend that even when using different form calculation methods, you should use a consistent scoring scale so that you can calculate the averages of multiple forms.

For example, if you want to use a mixture of percentages with accumulative scores, the maximum score should be configured to 100.

Defining the Form Scoring Method

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Calculations** tab.
The **Calculations** screen opens in the right pane.
- 3 From the **Scoring Method** list, select the desired scoring method. See ["Scoring Methods"](#) on page 61, for a description of each scoring method.
- 4 If a **Percentage** scoring method is selected, set the **"Base Percentage"** on page 65.
It is possible to set a negative base percentage score. See ["Allowing Negative Scores"](#) on page 70.

- 5 Click **Save** in the toolbar.

Setting the Maximum Score for the Form

Max Score vs. Max Possible Score: The form maximum score is a static value set by the form designer. The maximum possible score is a dynamic value that is affected by the scoring conditions and rules, and ultimately, by how evaluators and assessors fill the form before they submit it.

To set the maximum score for the form

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Calculations** tab.
The **Calculations** screen opens in the right pane.
- 3 In the **Max Score** field, type the maximum score for the form.

- 4 To view the form navigation tree with the maximum score of all of the form components and update the maximum score field, click **Update Max Score**. This field holds the static maximum score attained, without reference to how the users fill the form.
- 5 The **Form Calculation** dialog box opens.
- 6 In the **Form Calculation** dialog box, click **Calculate**.
The form navigation tree is displayed with a breakdown of the form scores.
- 7 If you click **Update Max Score**, the **Max Score** field in the calculations tab is updated.
- 8 Click **Cancel** to stop the update of the maximum score and return to the **Calculations** tab.
- 9 Click **Save** in the toolbar.

NOTE

At any stage of designing the form, a breakdown of the form's score can be displayed and the maximum form score calculated. This is either accessed as described above or by clicking **Calculate** in the Form Designer window toolbar, see "[Checking the Form Calculation](#)" on page 110.
This score does not take rules into account.

Setting the Minimum Score for the Form

Set an optional minimum score to prevent the form's score from reaching a score lower than this value. See "[Minimum Scores](#)" on page 63.

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Calculations** tab.
The **Calculations** screen opens in the right pane.
- 3 In the **Minimum Score** field, type the minimum score.
- 4 Click **Save** in the toolbar.

Setting the Baseline Score for the Form

Set an optional baseline score for the form. The baseline is a positive or negative value that is added to, or subtracted from, the form's score. See "[Baseline Scores](#)" on page 64.

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Calculations** tab.
The **Calculations** screen opens in the right pane.
- 3 In the **Baseline Score** field, type the baseline score.
- 4 Click **Save** in the toolbar.

Setting the Passing Score for the Form

You can set an optional **Passing Score** for the form. The passing score is a numeric value that provides a means of assessing if a form has passed the given score. See ["Passing Scores"](#) on page 65.

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Calculations** tab.
The **Calculations** screen opens in the right pane.
- 3 In the **Passing Score** field, type the passing score.
- 4 Click **Save** in the toolbar.

Setting the Precision for the Form Score

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Calculations** tab.
The **Calculations** screen opens in the right pane.
- 3 Select the **Precision** for the form from the list. The default precision is three significant digits, expressed to two places after the decimal point (x.xx). See ["Score Precision"](#) on page 65.
- 4 Click **Save** in the toolbar.

Allowing Negative Scores

- 1 To enable negative score values for calculations, and scoring and visibility rules for a form, select the form in the Form List.
The Form Designer window opens. The Form Properties pane is displayed on the right.
- 2 In the Form Properties pane, click the **Calculations** tab.
The **Calculations** screen opens in the right pane.
- 3 Select **Allow Negative Score** to enable negative scores for all the form components and rules.
You can configure negative values for all form component scores and rules, including negative percentage-based scores. See ["Passing Scores"](#) on page 65 for more information.
If this option is not selected, the form's score can never be below zero or the minimum score defined for the form.
- 4 In the Workspace toolbar, click **Save**.

Defining Component Scoring

The following topics describe how to define the scoring for sections, categories and questions when you create these components:

- [Defining Scoring Parameters for a Section or Category](#), page 46
- [Defining Question Scores](#), page 52
- [Setting Question Scoring Parameters](#), page 54

Maximum Possible Score

The attained scores for components and actual score for a form are displayed when a form is submitted. To help supervisors compare the scores their agents obtain with the total points available in a form or a component, the inContact system also stores the sums of attained and possible scores for form components, and the maximum possible scores for forms and components. These calculated values are available in the Data Warehouse for inContact.

The maximum possible scores for forms and components are based on the points awarded to questions when evaluators or assessors submit a form. The maximum possible score is affected by the scoring methods used for the form and the components, and by whether rules that affect the scores are included in, or excluded from, the calculation. See "[Scoring Rules Overview](#)" on page 94, and "[Controls to Include or Exclude Rules](#)" on page 95.

The following topics describe the fields, scoring data, and calculations for the Maximum Possible Score:

- [Maximum Possible Score Fields](#), page 71
- [Conditions and Limitations for Maximum Possible Score](#), page 73
- [Maximum Possible Score and Actual Score Calculation Methods](#), page 75
- [Bonus and Penalty Scoring Methods](#), page 76
- [Maximum Possible Score Examples](#), page 78
- [Bonus Scoring Examples](#), page 89

Maximum Possible Score Fields

The following fields are populated when a form is submitted, and are available in the inContact Data Warehouse for each evaluated and submitted form, and for each component:

- **Sum of Attained Scores (A)**—The sum of attained scores, according to the component level that is defined in the calculation method. Scoring rules are always considered, depending on how they are configured.

For example, for a category score calculated using the Question Sum method, this is the sum of scores attained for the questions in the category.

- **Sum of Possible Scores (B)**—The sum of maximum possible scores, according to the component level that is defined in the calculation method. Scoring rules are considered, depending on how they are configured.

For example, for the Question Sum method, this is the sum of the maximum possible scores for each question.

- **Max Possible Score (C)**—The maximum possible score for the element, depending on both the component level and the calculation method. Scoring rules are considered, depending on how they are configured.
- **Actual Score (D)**—The actual score, with the scoring rules applied.

The formula to calculate the actual score, for forms that include user-configured scoring rules, is given below.

$$\frac{\text{Sum of Attained Scores}}{\text{Sum of Possible Scores}} \times \text{Max Possible Score} = \text{Actual Score} = \frac{A}{B} \times C = D$$

The following table shows how the parameter for the Max Possible Score (C) is defined, depending on the calculation method.

Calculation Method	C	Notes
Sum	Sum of possible scores (C = B)	The actual score (D) equals the sum of attained scores (A): B and C drop out of the equation
Average	$C = \frac{\text{sum of possible scores (B)}}{\text{\# of answered components}}$	$D = \frac{A}{\text{\# of answered components}}$ B and C drop out of the equation
Percentage	Base percentage of the component, as calculated in the formula: C is the base percentage of the component	

Conditions and Limitations for Maximum Possible Score

This topic describes the conditions and limitations that affect the Maximum Possible Score fields.

Maximum Possible Score and Scoring Rule Conditions

The scoring rules that affect the Maximum Possible Score fields have the following conditions and limitations:

- **Set Value** rules: By default, the system does not include these rules in maximum possible score percentage calculations. This condition can be configured.
- **Increase/Decrease Score** rules: By default, the system includes these rules in maximum score percentage calculations.
- **Increase/Decrease Sum of Attained Scores** rules. By default, the system includes these rules in maximum score percentage calculations.
- **Set Answer** scoring rules: The **Set Answer** rule behaves as if the user has made a change to a specific answer and therefore, it is not really a modification of the user's original input. The calculation is performed as if the value is the result of normal user input. Therefore, these rules cannot be configured to be included or excluded in the maximum possible score calculations.
- **Set to Max Possible Score** rules: These rules are included in the maximum possible score calculations and cannot be configured to be excluded from the maximum possible score calculations.

The following controls and rules can be configured to modify the Maximum Possible Score:

- [Controls to Include or Exclude Rules](#), page 95
- [Defining Scoring Actions](#), page 97

Scoring Options and Method Conditions

The following conditions and limitations affect the Maximum Possible Score fields:

- If percentage-based scoring is used for a category, section, or form, the Max Possible Score is the base percentage set for that component.
- To calculate the maximum possible score for a category, section, or form as the sum of all relevant components, set the scoring method for that section (or category) to sum.
- For components that have Minimum Scores, the value of the Minimum Score is used in the Maximum Possible Score calculation if the attained score is lower than the Minimum Score.
- For components that have Baseline Scores, the value of the Baseline Score is added to the calculated Actual Score:

$$\text{New Actual Score} = \left(\frac{A}{B} \times C\right) + \text{Baseline Score}$$

The table below summarizes the scoring conditions for the Maximum Possible Score calculation.

Scoring Condition					Included in Maximum Possible Score Calculation
Visibility Rules					
Hidden components: Components that are hidden by a rule					x
Disabled components: Components that are disabled by a rule					
Scoring Rules					
Set to Max Possible Score: Sets the score of the selected element to the Maximum Possible Score					
Include Set Value rules in max points calculation					Configurable
Include Increase / Decrease rules in max points calculation					Configurable
Question Answer Types and Scores					
Question	answered		with		N/A x
Question	with	score	set	to	Null x
Question that is skipped, and does not have a default answer					x
Question with Minimum Score configured The value of the Minimum Score is used in the calculation if the attained score is lower than the minimum score.					
Question with Baseline Score The value of the Baseline Score is used in the calculation					
Forms, Components, and Calculation Methods					
Component scoring method set to None: For section or category					x
Form calculation: Use section or category, by selected method.					
Section calculation: Use category, by selected method.					
Category calculation: Question sum, percentage, or average.					

Maximum Possible Score and Actual Score Calculation Methods

The following calculation methods exist to determine the values for the Maximum Possible Score (C) and Actual Score (D) fields:

Sum Calculation Method

The sum calculation method has the following values for the Maximum and Actual Scores:

Score Field	Sum Calculation Value
Max Possible Score (C)	Sum of Possible Scores (B)
Actual Score (D)	Sum of Attained Scores

Average Calculation Method

The average calculation method has the following values for the Maximum and Actual Scores:

Score Field	Average Calculation Value
Max Possible Score (C)	$\frac{\text{sum of possible scores (B)}}{\text{\# of elements answered}}$
Actual Score (D)	Average of Attained Scores

Percentage Calculation Method

The percentage calculation method has the following values for the Maximum and Actual Scores:

Score Field	Percentage Calculation Value
Max Possible Score (C)	Base Percentage
Actual Score (D)	$\frac{A}{B} \times \text{Base Percentage}$

All the above calculation methods have the following values for the Sum of Attained Scores (A) and the Sum of Possible Scores (B):

- Sum of Attained Scores (A): Sum of attained scores according to component defined in the calculation method.

For a category score calculated using the Question Sum method, the value is defined as the sum of scores attained for the questions in the category.

- Sum of Possible Scores (B): Sum of maximum possible scores, according to the component defined in the calculation method.

This value is affected by how scoring rules are configured. For Question Sum, the value is defined as the sum of the maximum possible scores for each question.

Bonus and Penalty Scoring Methods

Bonus points can be added to (or penalty points subtracted from) a score in a percentage calculation or an average by configuring the **Increase/Decrease Score** or **Increase/Decrease Sum of Attained Scores** rules. See ["Defining Scoring Actions"](#) on page 97.

Adding Bonuses:

- To add a bonus to the final score (D) configure an **Increase Score** rule.
- To add a bonus to the sum of attained scores (A) before calculating the final score, configure an **Increase Sum of Attained Scores** rule.

The following table compares different methods of adding a bonus to a percentage calculation.

Adding a Bonus to a Percentage Calculation with an Increase Score Rule	Adding a Bonus to the Attained Score in a Percentage Calculation with an Increase Sum of Attained Scores Rule
$\frac{A}{B} \times C + \text{Bonus}$	$\frac{A + \text{Bonus}}{B} \times C$

- To add a bonus to an average, configure an **Increase Score** rule.
- To add a bonus to an average before calculating the final score, configure an **Increase Sum of Attained Scores** rule.

The following table compares different methods of adding a bonus to an average calculation.

Adding a Bonus to an Average Calculation with an Increase Score Rule	Adding a Bonus to the Sum of Attained Scores in an Average Calculation with an Increase Sum of Attained Scores Rule
$\frac{\text{A}}{\text{\# of elements answered}} + \text{Bonus}$	$\frac{\text{A} + \text{Bonus}}{\text{\# of elements answered}}$

Subtracting Penalties:

- To subtract a penalty from the final score, configure a **Decrease Score** rule.
- To subtract a penalty from the sum of attained scores (A) before calculating the final score, configure a **Decrease Sum of Attained Scores** rule.

The following table compares different methods of subtracting a penalty from a percentage calculation

Subtracting a Penalty from Percentage Calculation with a Decrease Score Rule	Subtracting a Penalty from the Sum of Attained Scores in a Percentage Calculation with a Decrease Sum of Attained Scores Rule
$\frac{\text{A}}{\text{B}} \times \text{C} - \text{Penalty}$	$\frac{\text{A} - \text{Penalty}}{\text{B}} \times \text{C}$

- To subtract a penalty from an average, configure a **Decrease Score** rule.
- To subtract a penalty from an average before calculating the final score, configure a **Decrease Sum of Attained Scores** rule.

The following table compares different methods of subtracting a penalty from an average calculation

Subtracting a Penalty from an Average Calculation with an Increase Score Rule	Subtracting a Penalty from the Sum of Attained Scores in an Average Calculation with an Increase Sum of Attained Scores Rule
$\frac{\text{A}}{\text{\# of elements answered}} - \text{Penalty}$	$\frac{\text{A} - \text{Penalty}}{\text{\# of elements answered}}$

Maximum Possible Score Examples

The examples describe the following scenarios:

- [Calculation with No Scoring Rules](#), page 78
- [Calculation with Skipped and N/A Questions](#), page 82
- [Calculations with Set Value and Increase/Decrease Rules](#), page 86
- [Calculation with Set to Max Possible Score Rule](#), page 88

Calculation with No Scoring Rules

The following graphic presents the form structure and the visibility rules. There are no scoring rules for this form.

The image shows two parts of the software interface. On the left is a tree view of the form structure, and on the right is the 'Rules' configuration window.

Form Structure (Left):

- Max score activity - form 1
 - Section1
 - Category1
 - Question1 - 1.00
 - Question2 - 1.00
 - Section2
 - Category1_1
 - Question1_1 - 1.00
 - Question2_1 - (min. score 4.00)
 - Category2
 - Question1_2 - 1.00
 - Question2_2 - 1.00
 - Question3 - 1.00

Rules Configuration (Right):

The 'Rules' window has tabs for General, Header, Footer, Calculations, and Rules. The 'Rules' tab is active, showing 'Visibility Rules' and 'Scoring Rules' sections. The 'Visibility Rules' section contains two rules:

- Rule 2:**
 - If:** Question1 - 1.00 ... Equals ... Yes
 - Then:** Hide ... Question2 - 1.00 ...
- Rule 1:**
 - If:** Question1_1 - 1.00 ... Equals ... Yes
 - Then:** Disable ... Question2_1 - (min. score 4.00) ...

On fillout, Question1 is answered Yes, thus Question2 is hidden, Question2_1 is disabled, and the components are scored as follows:

Component	Score
Section1, Category1	Section1 = 1.00, Category1 = 1.00
Question1	1.00
Question2	Hidden, not included
Section2, Category1_1	Section2 = 8.00, Category1_1 = 5.00
Question1_1	1.00
Question2_1	Disabled, included, minimum score = 4.00
Section2, Category2	Section2 = 8.00, Category2 = 3.00
Question1_2	1.00
Question2_2	1.00
Question3	1.00

The screenshot shows a form designer interface with the following structure:

- Section1**
 - Category1**
 - Question1: ☒ Yes ☐ No ☐ N/A
 - Question2: **Question2 is hidden and not included**
- Section2**
 - Category1_1**
 - Question1_1: ☒ Yes ☐ No ☐ N/A
 - Question2_1: **Disabled, minimum score = 4.00**
 - Category2**
 - Question1_2: ☒ Yes ☐ No ☐ N/A
 - Question2_2: ☒ Yes ☐ No ☐ N/A
 - Question3: ☒ Yes ☐ No ☐ N/A

The disabled question is included in the sum of possible scores, and the Maximum Possible Score is calculated as follows:

- [Sum Calculation—No Scoring Rules](#), page 80
- [Average Calculation—No Scoring Rules](#), page 80
- [Percentage Calculation—No Scoring Rules](#), page 81

Sum Calculation—No Scoring Rules

Sum Calculation Method	Score
Section	
(A) Sum of Attained Scores = Section1 + Section 2	1.00 + 8.00 = 9.00
(B) Sum of Possible Scores = Section1 + Section 2	1.00 + 8.00 = 9.00
(C) Max Possible Score = Sum of Possible Scores	9.00
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 9.00$	9.00
Category	
(A) Sum of Attained Scores = Category1 + Category1_1 + Category2	1.00 + 5.00 + 3.00 = 9.00
(B) Sum of Possible Scores = Category1 + Category1_1 + Category2	1.00 + 5.00 + 3.00 = 9.00
(C) Max Possible Score = Sum of Possible Scores	9.00
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 9.00$	9.00
Questions	
(A) Sum of Attained Scores = Q1 + Q1_1 + Q2_1 + Q1_2 + Q2_2 + Q3	1 + 1 + 4 + 1 + 1 + 1 = 9.00
(B) Sum of Possible Scores = Q1 + Q1_1 + Q2_1 + Q1_2 + Q2_2 + Q3	1 + 1 + 4 + 1 + 1 + 1 = 9.00
(C) Max Possible Score = Sum of Possible Scores	9.00
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 9.00$	9.00

Average Calculation—No Scoring Rules

Average Calculation Method	Score
Section	
(A) Sum of Attained Scores = Section1 + Section 2	1.00 + 8.00 = 9.00
(B) Sum of Possible Scores = Section1 + Section 2	1.00 + 8.00 = 9.00

Average Calculation Method		Score
(C) Max Possible Score = $\frac{\text{Section1} + \text{Section2}}{2}$		$\frac{1.00 + 8.00}{2} = 4.50$
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 4.50$		4.50
Category		
(A) Sum of Attained Scores = Category1 + Category1_1 + Category2		1.00 + 5.00 + 3.00 = 9.00
(B) Sum of Possible Scores = Category1 + Category1_1 + Category2		1.00 + 5.00 + 3.00 = 9.00
(C) Max Possible Score = $\frac{\text{Category1} + \text{Category1_1} + \text{Category2}}{3}$		$\frac{1.00 + 5.00 + 3.00}{3} = 3.00$
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 3.00$		3.00
Questions		
(A) Sum of Attained Scores = Q1 + Q1_1 + Q2_1 + Q1_2 + Q2_2 + Q3		1 + 1 + 4 + 1 + 1 + 1 = 9.00
(B) Sum of Possible Scores = Q1 + Q1_1 + Q2_1 + Q1_2 + Q2_2 + Q3		1 + 1 + 4 + 1 + 1 + 1 = 9.00
(C) Max Possible Score = $\frac{Q1 + Q1_1 + Q2_1 + Q1_2 + Q2_2 + Q3}{6}$		$\frac{1+1+4+1+1+1}{6} = 1.50$
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 1.50$		1.50

Percentage Calculation—No Scoring Rules

Percentage Calculation Method (Base Percentage = 100)		Score
Section		
(A) Sum of Attained Scores = Section1 + Section 2		1.00 + 8.00 = 9.00
(B) Sum of Possible Scores = Section1 + Section 2		1.00 + 8.00 = 9.00
(C) Max Possible Score = Base Percentage		100
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 100$		100
Category		
(A) Sum of Attained Scores = Category1 + Category1_1 + Category2		1.00 + 5.00 + 3.00 = 9.00
(B) Sum of Possible Scores = Category1 + Category1_1 + Category2		1.00 + 5.00 + 3.00 = 9.00
(C) Max Possible Score = Base Percentage		100

Percentage Calculation Method (Base Percentage = 100)	Score
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 100$	$\frac{1.00 + 5.00 + 3.00}{1.00 + 5.00 + 3.00} \times 100 = 100$
Questions	
(A) Sum of Attained Scores = Q1 + Q1_1 + Q2_1 + Q1_2 + Q2_2 + Q3	1 + 1 + 4 + 1 + 1 + 1 = 9.00
(B) Sum of Possible Scores = Q1 + Q1_1 + Q2_1 + Q1_2 + Q2_2 + Q3	1 + 1 + 4 + 1 + 1 + 1 = 9.00
(C) Max Possible Score = Base Percentage	100
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{9.00}{9.00} \times 100$	100

Calculation with Skipped and N/A Questions

This example uses the same form and rules as the "Calculation with No Scoring Rules" on page 78, with the following differences:

- Visibility rules: Question1 is answered No, thus Question2 is visible, and Question2_1 is enabled
- Question1_1 is skipped
- Question3 is N/A

On fillout, the components are scored as follows:

Component	Score
Section1, Category1	Actual Scores: Section1 = 1.00, Category1 = 1.00 Maximum Possible Scores: Section1 = 2.00, Category1 = 2.00
Question1	Answered No, Score = 0 (Maximum Possible Score = 1.00)
Question2	Not Hidden, Score = 1.00
Section2, Category1_1	Section2 = 6.00, Category1_1 = 4.00
Question1_1	Skipped, not included
Question2_1	4.00
Section2, Category2	Section2 = 6.00, Category2 = 2.00
Question1_2	1.00
Question2_2	1.00
Question3	N/A, not included

The screenshot shows a hierarchical form structure. Under 'Section1', 'Category1' has 'Question1' (score 1.00, Yes/No/N/A) and 'Question2' (score 1.00, Yes/No/N/A). Under 'Section2', 'Category1_1' has 'Question1_1' (score 1.00, Yes/No/N/A) and 'Question2_1' (min. score 4.00, Yes/No/N/A). 'Category2' has 'Question1_2' (score 1.00, Yes/No/N/A), 'Question2_2' (score 1.00, Yes/No/N/A), and 'Question3' (score 1.00, Yes/No/N/A). Red arrows and text labels 'Skipped' and 'N/A' highlight specific question states.

The Maximum Possible Score is calculated as follows:

- [Sum Calculation—Skipped and N/A Questions](#), page 83
- [Average Calculation—Skipped and N/A Questions](#), page 84
- [Percentage Calculation—Skipped and N/A Questions](#), page 85

Sum Calculation—Skipped and N/A Questions

Sum Calculation Method	Score
Section	
(A) Sum of Attained Scores = Section1 + Section 2	1.00 + 6.00 = 7.00
(B) Sum of Possible Scores = Section1 + Section 2	2.00 + 6.00 = 8.00
(C) Max Possible Score = Sum of Possible Scores	8.00
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 8.00$	7.00
Category	
(A) Sum of Attained Scores = Category1 + Category1_1 + Category2	1.00 + 4.00 + 2.00 = 7.00
(B) Sum of Possible Scores = Category1 + Category1_1 + Category2	2.00 + 4.00 + 2.00 = 8.00

Sum Calculation Method	Score
(C) Max Possible Score = Sum of Possible Scores	8.00
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 8.00$	7.00
Questions	
(A) Sum of Attained Scores = Q1 + Q2 + Q2_1 + Q1_2 + Q2_2	0 + 1 + 4 + 1 + 1 = 7.00
(B) Sum of Possible Scores = Q1 + Q2 + Q2_1 + Q1_2 + Q2_2	1 + 1 + 4 + 1 + 1 = 8.00
(C) Max Possible Score = Sum of Possible Scores	8.00
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 8.00$	7.00

Average Calculation—Skipped and N/A Questions

Average Calculation Method	Score
Section	
(A) Sum of Attained Scores = Section1 + Section 2	1.00 + 6.00 = 7.00
(B) Sum of Possible Scores = Section1 + Section 2	2.00 + 6.00 = 8.00
(C) Max Possible Score = $\frac{\text{Section1} + \text{Section2}}{2}$	$\frac{2.00 + 6.00}{2} = 4.00$
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 4.00$	3.50
Category	
(A) Sum of Attained Scores = Category1 + Category1_1 + Category2	1.00 + 4.00 + 2.00 = 7.00
(B) Sum of Possible Scores = Category1 + Category1_1 + Category2	2.00 + 4.00 + 2.00 = 8.00
(C) Max Possible Score = $\frac{\text{Category1} + \text{Category1}_1 + \text{Category2}}{3}$	$\frac{2.00 + 4.00 + 2.00}{3} = 2.67$
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 2.67$	2.33
Questions	
(A) Sum of Attained Scores = Q1 + Q2 + Q2_1 + Q1_2 + Q2_2	0 + 1 + 4 + 1 + 1 = 7.00
(B) Sum of Possible Scores = Q1 + Q2 + Q2_1 + Q1_2 + Q2_2	1 + 1 + 4 + 1 + 1 = 8.00

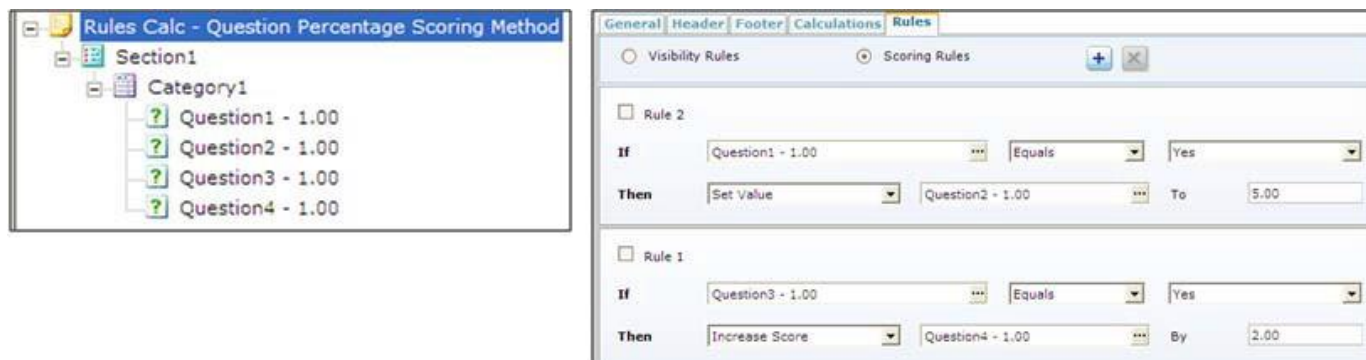
Average Calculation Method	Score
(C) Max Possible Score =	$\frac{1+1+4+1+1}{6} = 1.60$
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 1.60$	1.40

Percentage Calculation—Skipped and N/A Questions

Percentage Calculation Method (Base Percentage = 100)	Score
Section	
(A) Sum of Attained Scores = Section1 + Section 2	1.00 + 6.00 = 7.00
(B) Sum of Possible Scores = Section1 + Section 2	2.00 + 6.00 = 8.00
(C) Max Possible Score = Base Percentage	100
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 100$	87.5
Category	
(A) Sum of Attained Scores = Category1 + Category1_1 + Category2	1.00 + 4.00 + 2.00 = 7.00
(B) Sum of Possible Scores = Category1 + Category1_1 + Category2	2.00 + 4.00 + 2.00 = 8.00
(C) Max Possible Score = Base Percentage	100
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 100$	$\frac{7.00}{8.00} \times 100 = 87.5$
Questions	
(A) Sum of Attained Scores = Q1 + Q2 + Q2_1 + Q1_2 + Q2_2	0 + 1 + 4 + 1 + 1 = 7.00
(B) Sum of Possible Scores = Q1 + Q2 + Q2_1 + Q1_2 + Q2_2	1 + 1 + 4 + 1 + 1 = 8.00
(C) Max Possible Score = Base Percentage	100
(D) Actual Score = $\frac{A}{B} \times C = D = \frac{7.00}{8.00} \times 100$	87.5

Calculations with Set Value and Increase/Decrease Rules

The following graphic presents the form structure and the scoring rules.



The components are scored as follows:

Component	Attained Scores
Section1, Category1	Section1 = 10.00, Category1 = 10.00
Question1	1.00
Question2	5.00 (Set Value rule)
Question3	1.00
Question4	3.00 (Increase Score rule: 1.00 + 2.00)

In this calculation example, the control check boxes in the Calculations tab are set to different configurations, which affects the Sum of Possible Scores in the denominator, and changes the actual score, as follows (See ["Controls to Include or Exclude Rules"](#) on page 95):

Default control configuration

- The Set Value rule for Question2 is not included in the percentage calculation.
- The Increase Score rule for Question4 is included in the percentage calculation.

Form: Rules Calc - Question Percentage Scoring Method (New) Score: 166.67

Details

Form Name: Rules Calc - Question Percentage Scoring Method
 Evaluator: Lees, Dana
 Agent: Admin, Ultra
 Group: Dana Group1

Section1 Score:

Category1 Score:

Question1 - 1.00
☒ Yes ☐ No ☐ N/A Score: 1.00

Question2 - 1.00
☒ Yes ☐ No ☐ N/A Score: 5.00

Question3 - 1.00
☒ Yes ☐ No ☐ N/A Score: 1.00

Question4 - 1.00
☒ Yes ☐ No ☐ N/A Score: 3.00

$$\text{Actual Score (D)} = \frac{\text{Sum of Attained Scores}}{\text{Sum of Possible Scores}} \times \text{base percentage} = \frac{1 + 5 + 1 + 3}{1 + 1 + 1 + 3} \times 100 = \frac{10}{6} \times 100 = 166.67$$

Both controls checked

- The Set Value rule for Question2 is included in the percentage calculation.
- The Increase Score rule for Question4 is included in the percentage calculation.

$$\text{Actual Score (D)} = \frac{\text{Sum of Attained Scores}}{\text{Sum of Possible Scores}} \times \text{base percentage} = \frac{1 + 5 + 1 + 3}{1 + 5 + 1 + 3} \times 100 = \frac{10}{10} \times 100 = 100$$

Both controls unchecked

- The Set Value rule for Question2 is not included in the percentage calculation.
- The Increase Score rule for Question4 is not included in the percentage calculation.

$$\text{Actual Score (D)} = \frac{\text{Sum of Attained Scores}}{\text{Sum of Possible Scores}} \times \text{base percentage} = \frac{1 + 5 + 1 + 3}{1 + 1 + 1 + 1} \times 100 = \frac{10}{4} \times 100 = 250$$

Calculation with Set to Max Possible Score Rule

The following graphic presents the form structure and the scoring rules (see “Defining Scoring Actions” on page 97):

On form fillout, the following occurs:

- If Rule 1 is enabled, and the score for Question1 is 5.00, the Attained Score for Category2 is set to the maximum possible score:

$$\text{Question1} + \text{Question2} = 5.00 + 5.00 = 10.00$$
- If Rule 1 is not enabled, or the score for Question 1 is not 5.00, the Attained Score for Category2 is calculated according to the scores for the actual answers:

$$\text{Question1} + \text{Question2} = 3.00 + 2.00 = 5.00$$

Bonus Scoring Examples

The following graphic presents the form structure and the scoring rules (see “[Defining Scoring Actions](#)” on page 97) for a form that adds bonus points to the sum of attained scores before calculating the final score:

In this example, the form score is calculated using the Question Percentage method, with a base percentage of 100. On form fill out, both questions score 1 point, and the **Increase Sum of Attained Scores** rule adds a point to the sum of the attained scores in the numerator of the calculation. The final score is:

$$\frac{A + \text{Bonus}}{B} \times C = \frac{2 + 1}{2} \times 100 = 150$$

If the **Increase Score** rule is used, the final score is:

$$\frac{A}{B} \times C + \text{Bonus} = \frac{2}{2} \times 100 + 1 = 101$$

Defining Rules for Visibility and Scoring

This topic describes form and component scoring rules.

- [Creating Form Rules](#), page 91
- [Creating Visibility Rules](#), page 91
- [Scoring Rules Overview](#), page 94
- [Creating Scoring Rules](#), page 96

Creating Form Rules

You can trigger visibility and scoring actions by attaching a list of rules to each question or custom data field in a form. The following two types of rules are used to trigger visibility and scoring actions:

- **Visibility Rule:** Sets the appearance or enabled state for a question, section, or category.
- **Scoring Rule:** Sets a score or answer to a specific value (including the Maximum Possible Score), or adds or subtracts a value from a component or form score.

Each rule consists of conditions and actions, as follows:

- **Conditions:** The circumstances that must be present for the rule to be enabled.
- **Actions:** The outcome achieved when the conditions are satisfied.

To set the conditions and actions for visibility and scoring tasks, use the following procedures:

- [Creating Visibility Rules](#), page 91
- [Creating Scoring Rules](#), page 96

Visibility and Scoring Rule Examples

- A visibility rule on Question 1 can be: IF Custom Data 1 = Value1, THEN Disable Question 1
- A scoring rule on Section 1 can be: IF Question 1 = Value2, THEN Increase Score of Section 1 by 10

NOTE

We recommend that you define the rules only after the form is fully designed.

Creating Visibility Rules

You can create visibility rules to enable, disable, hide, collapse, or expand any form component based on one of the following triggering conditions:

- How a specific question is answered when the user fills in the form
- Which value is entered in one of the form Custom Data fields in the header

The changes occur dynamically on the user's screen.

The procedure to create a visibility rule consists of the following actions:

- [Defining Visibility Triggering Conditions](#), page 92
- [Defining Visibility Actions](#), page 93

Defining Visibility Triggering Conditions

- 1 In the navigation tree of the Form Designer window, select the form name.
- 2 Select the **Rules** tab in the right pane.
- 3 Select the **Visibility Rules** option.
- 4 Click **Add Rule**.
- 5 In the **If** field, click **Component Selector**.

The **Component Selector** dialog box opens. You can only select the components marked with the **Selectable** icon.

- 6 Select the question or custom data field you want to add and click **OK**.
- 7 In the next field, select one of the following conditions:
 - =, Equals
 - <, Less than (where available)
 - >, Greater than (where available)
 - Is Either allows you to select more than one answer in the next field
 - Does not equal

If only one value is selected for the **Is Either** condition, the **Equals** condition is implemented in the rule. The next time you select this rule, it appears as an **Equals** rule, and not as an **Is Either** rule.

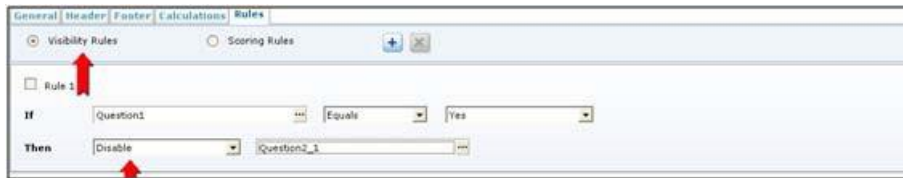
- 8 In the next field, select one of the following answer types, based on the type of question and the symbol you selected in the previous step:
 - If the **Equals** condition is selected, select a list enabling multiple selection of values.
 - If the question is numeric or text, select a text field.
 - Select a list containing question answers.
- 9 Define the visibility actions. See "[Defining Visibility Actions](#)" on page 93.

Defining Visibility Actions

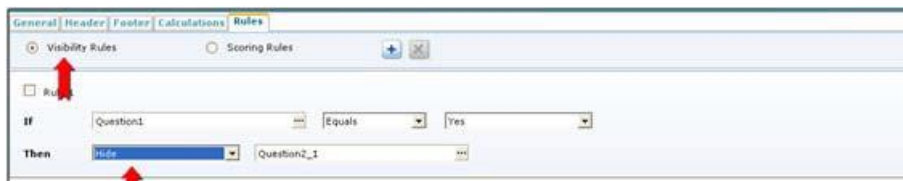
You can define which visibility actions are triggered by a visibility rule. By default, each visibility rule should trigger the opposite action when the condition for the rule is not met. For example: If a certain value in a question disables a component in the form, choosing another value should automatically enable the component.

If you create multiple rules, save the form, close it, and then reopen it, the rules do not necessarily appear in the order in which you created them.

- 1 Define the triggering conditions. See “[Defining Visibility Triggering Conditions](#)” on page 92.
- 2 In the THEN field, select one of the following actions to be performed in the form:
 - **Collapse/Expand:** The component appears collapsed or expanded when the user fills in the form. If the action is on a question, then the Collapse/Expand option does not appear.
 - **Enable/Disable:** The component functions normally when the Enable action is selected. Conversely, when the Enable action is disabled, the component appears in the form, but it does not function.



- **Hide/Show:** The component is hidden or shown when the user fills in the form.



- 3 In the last field, click the **Component Selector**.
The **Component Selector** dialog box opens. You can only select the components marked with the **Selectable** icon.
- 4 Select the component to apply the rule to.
The rule is now defined.
- 5 Click **Save** in the toolbar.

Scoring Rules Overview

Scoring rules allow you to influence the score of any form component, based on one of the following triggering conditions:

- How a specific question is answered when the user fills in the form
- Which value is entered in one of the form Custom Data fields in the header

Different factors affect the scoring for forms and component groups. See the following topics for more information:

- [Category, Section, or Form Scoring Rules](#), page 94
- [Question Scoring Rules](#), page 94
- [Controls to Include or Exclude Rules](#), page 95

Category, Section, or Form Scoring Rules

The following restrictions affect how a section, category or form is scored:

- **One Answer Minimum:** The score can only be increased or decreased if at least one question within the category, section, or form is answered.
- **Minimum Score:** If the score is automatically decreased according to a rule, the score cannot be lower than the minimum score defined for the category, section, or form.

If a baseline is defined, it is still relevant when the final score for the category, section, or form is calculated.

- **Set Value:** A category, section, or form's score can be automatically set to a certain value, depending on how a specific question anywhere in the form is answered. This value is applied to the category, section, or form, regardless of whether the user answers a single question within the category, section, or form.
- **Set Value Override:** If a value is set, this value overrides any minimum scores that may be defined for the category, section, or form, and also cancels any baselines that are assigned.

Question Scoring Rules

Scoring rules can be created for questions and custom data.

Each rule consists of conditions and actions, as follows:

- **Conditions:** The circumstances that must be present for the rule to be enabled.
- **Actions:** The outcome when the conditions have been satisfied.

The following restrictions affect how a question is scored:

- **Answer Required:** A question must be answered for its score to be increased or decreased.
- **Minimum Score:** If the score is automatically decreased according to a rule, the score cannot be lower than the minimum score defined for the question.
If a baseline is defined, it is still relevant when the final score for the question is calculated.
- **Set Value Override:** If a value is set for a question, this value overrides the question's minimum score (if there is one), and also cancels any baseline that is assigned.
- **Linked Answer:** A question can be answered automatically, based on how another question is answered.
You can override the automatic answer and select a different answer. If a baseline is defined, it is still relevant when the final score for the question is calculated.
- **Linked Score:** A question's score may be automatically increased or decreased, depending on how another question anywhere in the form is answered.

Scoring Rule Example

A scoring rule on Section 1 can be: IF Question 1 = Value2, THEN Increase Score of Section 1 by 10.

Controls to Include or Exclude Rules

The following **Calculations** tab controls affect whether scores changed by specific rule types are included in a percentage calculation:

- **Include Set Value rules in percentage calculation**
Default = No
- **Include Increase / Decrease rules in percentage calculation**
Default = Yes
This control applies to both the **Increase/Decrease Score** and **Increase/Decrease Sum of Attained Scores** rules.

When these controls are selected, the modified value is included in the denominator of the percentage-based calculations. These controls affect the Maximum Possible Score calculation. See “[Calculations with Set Value and Increase/Decrease Rules](#)” on page 86. The graphic below presents the **Calculations** tab.

NOTE

For Balance-migrated forms, the defaults for both controls is **No**.

Creating Scoring Rules

A scoring rule can change a value, or add or subtract a score from a component or form score.

The procedure to create a scoring rule consists of the following actions:

- [Defining the Scoring Triggering Conditions](#), page 96
- [Defining Scoring Actions](#), page 97

Defining the Scoring Triggering Conditions

- 1 In the navigation tree of the Form Designer window, select the form name.
- 2 Select the **Rules** tab in the right pane.
- 3 Select the **Scoring Rules** option.

- 4 Click **Add Rule**.
- 5 In the **If** field, click the **Component Selector**.
The **Component Selector** dialog box opens. You can only select the components marked with the **Selectable** icon.
- 6 Select the component you want use to base the rule on, and click **OK**.
- 7 In the next field, select a symbol from the following list.
 - =, Equals
 - <, Less than (where available)
 - >, Greater than (where available)
 - Is Either allows you to select more than one answer in the next field
 - Does not equal

If only one value is selected for the **Is Either** condition, the **Equals** condition is implemented in the rule. The next time you select this rule, it appears as an **Equals** rule, and not as an **Is Either** rule.
- 8 In the next field, select one of the following answer types, based on the type of question and the symbol you selected in the previous step:
 - If the **Equals** condition is selected, select a list enabling multiple selection of values.
 - If the question is numeric or text, select a text field.
 - Select a list containing question answers.
- 9 Define the scoring actions. See ["Defining Scoring Actions"](#) on page 97.

Defining Scoring Actions

If you create multiple rules, save the form, close it, and then reopen it, the rules do not necessarily appear in the order in which you created them.

- 1 Define the triggering conditions. See ["Defining the Scoring Triggering Conditions"](#) on page 96.
- 2 In the **THEN** field, select one of the following actions for the form:
 - **Set Value**: Overrides the score in the question, category, section, or form.
When several different Set Value rules affect the value of the same form component, the rule that sets the lowest value has precedence.
This is true when the same score triggering action affects the value for the target component or when several different triggering actions affect the value for the target component.
 - **Increase Score**: Adds points to the value of the Actual Score for a question, category, section, or form.
 - **Decrease Score**: Subtracts points from the value of the Actual Score for a question, category, section, or form

- **Set Answer:** Overrides the answer (and the score, if relevant) for a form question. This action is only enabled if the condition applies to a question.
When you create a scoring rule with a Set Answer action, the answer of the target question is set when the form is scored. For example, when you apply a Set Answer action for question 1 to set the target question to **Yes**, if the condition for question 1 is met, when you click **Calculate**, question 2 is set to **Yes**.
- **Set to Max Possible Score:** Sets the form or the selected category or section score to the maximum score possible. The selected element is assigned the value of the Max Possible Score field (C). See “Maximum Possible Score Fields” on page 71.
- **Increase Sum of Attained Scores:** Increases the sum of the Attained Scores of the category, section, or form score by adding points to the numerator of a calculation.
- **Decrease Sum of Attained Scores:** Decreases sum of the Attained Scores of the category, section, or form score by subtracting points from the numerator of a calculation.

The screenshot shows the 'Rules' tab in the software interface. Under the 'Scoring Rules' section, a rule named 'Rule 1' is configured. The 'If' condition is 'Question1 Equals Yes'. The 'Then' action is 'Increase Sum of Attained Scores', and the 'By' field is set to '10.00'.

- 3 In the next field, click the **Component Selector**.
The **Component Selector** dialog box opens. You can only select the components marked with the **Selectable** icon.
- 4 Select the component you want to add and click **OK**.
- 5 In the next field, depending on the selection in the **THEN** field, do one of the following:
 - To change the score by a specific value, select **Increase/Decrease Score** and type or select a value for the **By** field.
 - To set a value or answer for the question, select **Set Value/Set Answer** and type or select a value for the **To** field.
- 6 Click **Save** in the toolbar.

Set Value Rule Examples

The graphic below shows three rules with the same triggering condition to set the value of Question2.

Rule 2 overrides the other rules because it sets the lowest value, thus the value of Question2 is set to -5.00

The screenshot displays the 'Set Value Rules' configuration window. On the left is a tree view of the form structure, and on the right is the 'Rules' tab with three rules defined.

Tree View Structure:

- Set Value Rules
 - Section1
 - Category1
 - Question1
 - Question2
 - Question3
 - Category2
 - Question1_1
 - Question2_1
 - Section2
 - Category1_1
 - Question1_2
 - Question2_2
 - Section3
 - Category1_2
 - Question1_3
 - Question2_3
 - Question3_1
 - Question4

Rules Configuration:

Rule	Condition (If)	Action (Then)	Value (To)
Rule 1	Question1 Equals Yes	Set Value Question2	0.00
Rule 2	Question1 Equals Yes	Set Value Question2	-5.00
Rule 3	Question1 Equals Yes	Set Value Question2	1.00

The graphic below shows three rules with the different triggering condition to set the value of Section1.

Rule 2 overrides the other rules because it sets the lowest value, thus the value of Section1 is set to -25.00.

The screenshot displays the 'Set Value Rules' dialog box, which is used for defining rules for visibility and scoring. The dialog is divided into two main sections: a tree view on the left and a rule configuration area on the right.

Tree View (Left):

- Set Value Rules
 - Section1
 - Category1
 - Question1
 - Question2
 - Question3
 - Category2
 - Question1_1
 - Question2_1
 - Section2
 - Category1_1
 - Question1_2
 - Question2_2
 - Section3
 - Category1_2
 - Question1_3
 - Question2_3
 - Question3_1
 - Question4

Rule Configuration Area (Right):

The 'Rules' tab is selected, showing three rules. The 'Scoring Rules' radio button is active.

- Rule 1:**
 - If:** Question1 Equals Yes
 - Then:** Set Value Section1 To 10.00
- Rule 2:**
 - If:** Question4 Equals No
 - Then:** Set Value Section1 To -25.00
- Rule 3:**
 - If:** Question2 Equals Yes
 - Then:** Set Value Section1 To -0.50

Managing and Maintaining Forms

This topic describes how to manage and maintain forms. For more information on the toolbars in the Form Window and the Form List Window, see the ["Form Designer Interface"](#) on page 16.

- [Sorting and Filtering the Form List](#), page 102
- [Editing Forms](#), page 103
- [Saving Forms](#), page 106
- [Editing a Linked Form](#), page 105
- [Staging a Form](#), page 108
- [Setting Form Status](#), page 108
- [Checking the Form Calculation](#), page 110
- [Exporting and Importing a Form](#), page 111
- [Exporting the Form List to Excel](#), page 112
- [Renaming a Form](#), page 112
- [Deleting a Form](#), page 113

Sorting and Filtering the Form List

You can filter and sort the Form List to change its appearance and improve its usability by doing one or more of the following:

- “[Sorting the Form List](#)” on page 102, to access the information you require quickly, you can sort the form list according to various categories, or to view all the versions of a specific form.
- To reduce the size of the Form List and quickly find specific information, you can filter by various parameters. You can filter the Form List by the following parameters:
 - [Filtering the Form List by Form Type](#), page 103
 - [Filtering the Form List by Status](#), page 103
 - [Filtering the Form List by Form Author](#), page 103

Sorting the Form List

- 1 Click on a column title to change the list order.
The sorting column is indicated by a small arrow that indicates ascending or descending order.

- 2 To reverse the order, click the sorting column title twice.

The following table describes the sorting result when you click the column title.

Column Title	Result
Form Name	The forms are sorted alphabetically.
Version	Each version (1, 2) is grouped together.
Status	Each status is grouped together. See “ Changing the Form Status ” on page 109 for a description of each status.
Form Type	Each type is grouped together.
Description	The descriptions are listed.
Revision Notes	The revision notes are listed.
Creation Date	The dates are ordered from the oldest to the latest date.
Author	The names of the users who last modified the forms are sorted alphabetically.



The information in the form list can be sorted by any column title.

By default, the table is sorted by Form Name and displayed in alphabetical order. The column titles can be selected and dragged to any position in the row.

Filtering the Form List by Form Type

- 1 Click **Type** in the toolbar of the Form Designer List.
- 2 Select the filter to apply from the following list:
 - Evaluation and Assessment Forms
 - Templates
 - Linked Forms

The forms of the selected type appear in the list.

Filtering the Form List by Status

Click the arrow in the Status field and select one of the following filters:

- **All**: Forms of all status
- **Under Construction**: Forms that are only partially completed
- **Staged**: Forms that require testing before publishing
- **Published**: Forms that are ready to be filled-out
- **Hidden**: Forms that are no longer relevant but may be useful again

The forms of the selected status appear in the list.

Filtering the Form List by Form Author

- 1 To view only the forms of a specific author, click the arrow in the **Author** field.
 - 2 Select the name of the author from the list.
- The forms of the selected author appear in the list.

Editing Forms

You can edit a form in the Form List window. To edit forms, you must have the Edit Form right in User Management, in the Roles Setup tab. If you do not have the right to edit forms, you can only view the forms as read-only.

Edit is only displayed in the toolbar when a user has the appropriate permissions and when the form is not already open in edit mode.

When you edit a form, a new version of the form can be generated, depending on the status of the form. See ["New Form Versions"](#) on page 132 and ["Setting Form Status"](#) on page 108.

WARNING

Editing a form component can cause a new form version to be created. If you are unsure of the impact of creating a new form version, we recommend that you create a new form with a new name. See ["New Form Versions"](#) on page 132 for more information.

The following list describes the form statuses and the corresponding editing parameters per status:

Form Status	Editing Parameters
Under Construction or Staged	All fields in the form can be edited. Editing does not generate a new version.
Published or Hidden	Textual Fields can be edited without generating a new version. If any other fields are edited, the form is saved as a new version. Textual fields in a form are: - Comments - Captions - Sections/categories names and instructions - Question texts and instructions. - Revision notes and header/footer instructions in form-level fields

Editing a Form

- 1 In the Form List, select the form to edit. See ["Editing Form Versions"](#) on page 105, for information on editing the different form versions.
- 2 Click **Open Form** on the toolbar.
The Form Designer Window opens, and displays the form properties. You can also double-click the form name in the list to open the form.
- 3 Edit the form.
- 4 Run a spell check. See ["Running the Spell Checker"](#) on page 109.
- 5 Click the appropriate Save button in the toolbar.
The form that you edited is highlighted in the form list.

NOTE

There are three Save buttons on the toolbar. The form status determines which buttons are enabled. See ["Deleting a Form"](#) on page 113 for an explanation of each Save button.

Editing Form Versions

- 1 To display all versions of the form in the Form List, do one of the following:
 - Click the **Expand** button to the left of the form name.
 - Double-click the form name.All form versions are displayed.
- 2 Select a form version.
- 3 Do one of the following:
 - Click **Open Form** in the toolbar
 - Right-click the form version and select **Open Form**.The Form Designer Window opens and the form is displayed.
- 4 Edit the form.
- 5 Run a spell check. See ["Running the Spell Checker"](#) on page 109.
- 6 Click the appropriate Save button in the toolbar.



NOTE There are three Save buttons in the toolbar. The form status determines which buttons are enabled. See ["Deleting a Form"](#) on page 113 for an explanation of each Save button.

Editing a Linked Form

A linked form has its form type defined as Linked Form. Linked Forms can be attached to a question in a parent form to provide an additional level of questions. See ["Creating and Attaching Linked Forms"](#) on page 31 and ["Defining the General Form Properties"](#) on page 35.

A linked form can be attached to a question only if its status is Published.

When you change the status of a form that is already linked to another form to Hidden, it remains linked to that form.

- 1 To edit a published, linked form that is currently linked to another form and retain the form status as published and linked, do one of the following:
 - **To make changes to captions only:** When you edit the linked form, if you only change captions (that is, change the name of a question), you do not need to save the form as a new version.

The form remains Published. This is true for linked and parent forms.

- **To make structural changes to the form:** Save the form as a new version. See ["Deleting a Form"](#) on page 113 for more information.
The edited form's status automatically becomes Under Construction and the parent form remains linked to the previous (Published) version of the form. This is true for linked and parent forms.
Structural changes to a form include changing its scoring, adding or removing a question, and so on.
- 2 To link the parent form to the newly revised form, change the status of the currently published form to Hidden. See ["Setting Form Status"](#) on page 108.
- 3 Change the status of the new form from Under Construction to Published.
- 4 Edit the parent form attached to the linked form.
- 5 Reselect the new Published form.
The currently selected form is appended with the text tag Hidden. The end-user does not see the Hidden tag.
- 6 Save the form.

Saving Forms

You can use the following Save buttons to save forms in the Form Designer Window:

- **Save**
- **Save As**
- **Save New Version**

Save As is always displayed. **Save** and **Save New Version** are automatically enabled or disabled according to the status of the form you edit.

Consider the following examples:

- A Published form also exists as a second version, which has the Under Construction status. When you edit the Published form, the following occurs:
 - **Save New Version** is disabled because you already have a version of the form with the Under Construction status.
 - **Save** is disabled if you make a structural change to the Published form.
- Only **Save As** is enabled. You must create a new form because you can't have more than a single Under Construction version for a form.
- Editing a Published or Hidden form can trigger a new form version, depending on which fields you edit in the form. If only textual fields are edited, you do not need to save a new version of the form. See ["New Form Versions"](#) on page 132.

The following table summarizes the functionality for the different Save options.



Save: Saves a new form or overwrites an existing form.

Save is enabled in the following situations:

- For a form with the Under Construction or Staged status.
- For a form with the Published or Hidden status, when only the textual fields are edited.

Editing the form overrides the current version and does not create a new version.

The form retains its current status (Under Construction, Staged, Published, or Hidden) in the Form List.



Save New Version: Creates a new version of an existing form.

Save New Version is enabled for forms with the Published or Hidden status. The new form version is saved with the Under Construction status in the Form List.



Save As: Saves an edited form of any status as a new form. The form appears in the Form List, with the Under Construction status, or as a Template.

Saving a Form with a Different Name

- 1** After editing the form, click **Save As**.
The **New Form Name** dialog box appears.
- 2** Enter the new form name in the **Form Name** field.
- 3** Type the description of the form in the **Description** field.
- 4** To define the Form Type to create, select one of the following:
 - Evaluation
 - Assessment
 - Template
- 5** Click **OK**.

The form appears as a new form in the form list, with the Under Construction or Template status.

Staging a Form

You stage a form before it is published. The form is designed and then made available to users with the appropriate rights for reviewing and testing.

A staged form appears on the Interactions Home Page workspace and is filled in exactly as a published form, but its score is not included in any statistics. After the testing is complete, the form can be published, edited, or hidden.

You design and save a staged form exactly as you would any other form. To make the form available for testing, you change the status on the Form List to Staged.

- 1 Create and save a form exactly as any other form. See ["Creating a New Form"](#) on page 28.
- 2 In the Form List, change the status of the form to Staged. See ["Setting Form Status"](#) on page 108.

The form appears in the Workspace page in the Interactions Home Page and is available to users with the right to view and test staged forms.

- 3 After the form is tested as a staged form, do one of the following:
 - To make the form available for use, set the form status to Published.
 - To continue editing the form, open it in the Form Design window without changing the form status.
 - To hide the form, you must first set the form status to Published and then change it to Hidden.

Setting Form Status

A form can have one of the following possible status values:

- **Under Construction**
- **Staged**
- **Published**
- **Hidden**

You change and manage the status of form versions in the Form List. When a new form is saved, it appears in the form list with the default status of Under Construction. See ["Changing the Form Status"](#) on page 109 for more information.

The status of a form affects its availability to users. The following list describes how each status affects the form's availability:

- **Under Construction:** The form appears in the Form List, but is not visible in the list of available forms in the Interactions Home Page. You can continue to work on the form and modify it until you decide to either stage it or publish it. The form status can change back and forth between Under Construction and Staged.

- **Staged:** The form appears in the Form List and in the list of available forms in the Workspace of the Interactions Home Page. A Staged form is visible in the Interactions Home Page, but only to users with roles that include the **Use Draft Forms** privilege. Access to a specific Staged form is configured in the Assignment Manager. Staged forms can be tested and used to evaluate and assess real contacts: They can be filled-out and saved in the Interactions Home Page. When you save a filled Staged form in the Interactions Home Page, its score is not included in any statistics. Modifying a Staged form in Form Designer does not create a new form version. Note that staged forms cannot be used as linked forms.
- **Published:** Published forms can be used, hidden, and deleted, but cannot return to the Under Construction or Staged status. Once a form is Published, this status cannot be revoked. Published forms can only be Hidden or deleted. Only published forms can be used as linked forms.
- **Hidden:** Hidden forms are not shown anywhere in the Interactions Home Page or Reports application, but appear in the Form Designer List. Hidden forms can be changed back to Published. Only users with the **Hide Form** right in User Management, in the Roles Setup tab, can hide a form.

You cannot assign the Under Construction, Staged, or Published values to more than one version of a form. You can assign the Hidden value to multiple versions of the same form.

A Scenario for Managing Form Status

Consider a form that exists both as a Published version and as a version with the Hidden status.

To change the status of the Hidden form to Published, the version that currently has the Published status must first be changed to the Hidden status.

Running the Spell Checker

Check the spelling in your form before you publish or stage the form, as part of the normal form design workflow.

To open the Interactions Home Page spell checker, click **Spell Check** in the Form Designer workspace toolbar. See ["Form Designer Window"](#) on page 18.

Changing the Form Status

- 1 In the Form List, select the form.
- 2 Do one of the following:
 - Click **Change Status** in the Form List toolbar.
 - Use the right-click menu.
- 3 Select the new status from the Status list.
The status is changed in the Form List.

WARNING

A warning message appears if the user attempts to change the status of a form illegally.

For example, a warning is displayed when the user tries to change the status of a hidden form to published, if a published version of the form already exists.

Checking the Form Calculation

At any stage of designing the form, a breakdown of the form's score can be displayed and the maximum form score can be calculated. This is accessed from the **Calculations** Tab or with **Calculate** in the Form Designer window toolbar. See "[Defining Form Calculations](#)" on page 67.

NOTE

This score does not take rules into account.

You can perform the following procedures to check the form calculation:

- [Viewing Form Scores and Calculating the Maximum Form Score](#), page 110
- [Checking the Form Calculation Without Mandatory Fields](#), page 110

Viewing Form Scores and Calculating the Maximum Form Score

- 1 Click **Calculate** in the Form Designer Window toolbar.
The Calculate Max Score dialog box appears.
- 2 Click **Calculate**.
The navigation tree shows a breakdown of the form scores.
- 3 To update the maximum score for the form, click **Update Max Score**. See "[Setting the Maximum Score for the Form](#)" on page 68.
- 4 To return to the Form Designer Window, click **Cancel**.

Checking the Form Calculation Without Mandatory Fields

You can check the form calculation without answering the mandatory fields. Linked forms cannot be opened in the Preview mode.

- 1 Open the form in the Preview mode and check the calculation.
- 2 Check the calculation of the form that is under construction.

Exporting and Importing a Form

Forms can be saved to a file, or opened from a file and saved in the Form Designer. This is called exporting and importing.

You can do the following:

- [Exporting a Form](#), page 111
- [Importing a Form](#), page 111

Exporting a Form

- 1 In the Form Designer main window, select the form to be exported from the list.
- 2 Do one of the following:
 - Click **Export Form**.
 - Right-click on the list and select Export Form.

The **Export Selected Form** dialog box opens.

- 3 Select the file location for the exported form, type a new file name, and specify the file type for the form.
- 4 Click **Save** in the toolbar.

The form is exported to the specified location.

NOTE



A linked form becomes a textual question when exported. This is because there may not be a linked form question type in the systems you are exporting your form to.

Importing a Form

- 1 In the Form Designer main window, click **Import Form**.
The **Import Form** dialog box opens.
- 2 Select the form to import and click **Open**.
The imported form opens in the Form Designer window.
- 3 Review the form's name, description, and type, and make changes if required.
- 4 Click **OK**.
The form appears as a new form in the form list.
- 5 Click **Save** in the toolbar.

Exporting the Form List to Excel

You can export the form list to Excel and use it to notify other users of a new form, or provide a list of forms of specific interest.

You can filter and sort the list to locate relevant forms before you create and send the list.

- 1 Sort and filter the form list as required. See ["Sorting and Filtering the Form List"](#) on page 102.
- 2 From the toolbar, click **Export to Excel** in the toolbar.
The **Export Form List** dialog box opens.
- 3 Select the file location for the form spreadsheet.
- 4 Type a new file name.
- 5 Select the file type as required.
- 6 Click **Save**.

The form list is exported to an Excel file with the file name you specified in step 4.

Renaming a Form

If you have been assigned the right to edit forms in the inContact Portal, in User Management, in the Roles Setup tab, you can rename any form in the form list. When you change the name of a form, the names of all the versions of that form also change.

- 1 In the Form List, select the form you want to change.
- 2 Click **Rename** in the toolbar.
The **New Form Name** dialog box opens.
- 3 In the **Form Name** field, type a new the name for the form.
- 4 In the **Description** field, type the description you want to appear in the Form List.
The **Form Type** field is disabled.
- 5 Click **OK**.

Deleting a Form

The ability to delete a form is enabled only for users with the **Delete Form** privilege defined in User Management.

Deleting a form permanently deletes all its records from the system and cannot be undone. Deleted forms are no longer available as filters in searches and Reports. Any evaluations that were based on deleted forms are deleted as well, and are no longer available in searches or Reports.

You cannot delete a published form that is linked to another form.

- 1** From the Form List, select the form to delete.
- 2** Do one of the following:
 - Click **Delete Form** in the toolbar.
 - Right-click and select the **Delete Form** option.

A message box appears to confirm that you want to delete the form.

- 3** Click **Yes**.

The form is deleted and does not appear in the Form List.

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Using the Form Design Library

This topic describes how to configure and use the data in the Form Design Library.

- [Form Design Library Overview](#), page 117
- [Defining Form Custom Data](#), page 118
- [Including Evaluation Custom Data \(ECD\)](#), page 119
- [Defining Form Status Options](#), page 123
- [Defining Form Rating Sets](#), page 124
- [Defining Form Reason Fields](#), page 125
- [Creating Shared Components](#), page 126
- [Defining Default Forms](#), page 129

Form Design Library Overview

You can use the Form Design Library to access available data to create and edit forms and templates. You access the Form Design Library from the Form List window.

The Form Design Library comprises all the data that is available for any form or template. Within the form, there are various fields and components that can be filled in, using this predefined data.

This data is categorized under the following two headings in the Form List window:

- **Shared Data:** Shared Data refers to Custom Data, Status, Rating Sets, Reason and Default Form fields
- **Shared Components:** Shared Components refers to all components (sections, categories, and questions)

When you design a form and add Shared Data, you can choose values from a predefined list. Some of the information in the predefined lists is customized per system, and some of the information can be defined in the Form Designer, if you have the corresponding right in User Management.

Defining the Form Design Library

If you have the right to define information in the Form Designer, click any of the following to define the Form Design Library:

- [Defining Form Custom Data](#), page 118: Predefined Form Custom Data is added to the header of a form to customize the header according to the scope of the form.
- [Including Evaluation Custom Data \(ECD\)](#), page 119: Evaluation Custom Data is added to the header of a form to automatically populate data fields in the header.
- [Defining Form Status Options](#), page 123: Up to two optional form status fields can be added to the form footer when you design the form, to indicate priority or other actions.
- [Defining Form Rating Sets](#), page 124: A rating is a verbal translation of the achieved score, based on the form calculation. The rating appears in the footer of a form.
- [Defining Form Reason Fields](#), page 125: The reason field provides an explanation for the scoring of a question.
- [Creating Shared Components](#), page 126: Shared components are entire sections, categories, or questions with values and properties that you can save and reuse as components in other forms.
- [Defining Default Forms](#), page 129: The Default Form feature sets the form that automatically appears when the user wants to review a contact.

Defining Form Custom Data

You can build the available predefined form custom data available into the header of a form to customize the header according to the scope of the form. For example, you can add a Campaign Name field to the header, with an attached list of choices for customer service or marketing use.

The name of the custom data field is defined in the Caption Editor system tool, and the values are defined in the Form Designer.

The values of a custom data field can take the form of a free text field, a drop-down list of pre-defined values, or a drop-down list of pre-defined values that allows the addition of values that are not on the list. Only users with the **Manage Data** right in User Management can define custom data.

Use the following procedure to define Custom Data Values:

- 1 In the Form List window Toolbar, click **Shared Data**.

The **Shared Data Manager** dialog box opens. The **Custom Data** tab is selected by default.

- 2 From the Custom Data List, select the custom data to define.

The fields in the right pane are automatically populated according to the custom data.

- 3 In the **Status** section, select one of the following options:

- **Not Active:** The custom data does not appear in the form.
- **Active:** The custom data appears in the form.

- 4 In the **Type** list (this is how the values are displayed in the form), select one of the following:

- **Text:** Shows the user a free text box of up to 64 characters.
- **Values List:** Shows the user a list of text values in a table.

The **Allow Free Text** option at the bottom of the right pane is enabled.

- **Auto Populate:** Shows the user an automatically populated custom data field in the form header during form fill in.

When the user selects a value, the data field is populated by the external data source selected for the default value. See ["Including Evaluation Custom Data \(ECD\)"](#) on page 119 for more information.

NOTE



When you design the form and select the auto populate custom data option for the header, you can only select a default value from an external data source. All other fields are disabled. See ["Setting Up the Header"](#) on page 37.

- 5 To add values to the **Values List**, do the following:
 - a. Click **Add** and **Delete** to add or delete a row in the Values table.
The new value appears at the end of the list.
 - b. Click the **Caption** field and type text for the new value.
 - c. Each custom data value can have its own status. Click the **Status** field, and select one of the following from the list:
 - **Under Construction**: Custom data values can be added and deleted. You cannot change the status from Under Construction to Hidden.
 - **Published**: Custom data cannot be deleted, but values can be added. The custom data can only change from Published to Hidden.
 - **Hidden**: Custom data is not available for new forms, but is still used in old forms.
 - d. To enable the user to add a value to the list, click the **Allow Free Text** box.
- 6 Click **OK**.
The changes are saved, the **Shared Data Manager** dialog box closes, and you return to the Form List.

Including Evaluation Custom Data (ECD)

In the Form Designer, users can select user fields (that relate to either the agent or the evaluator) from a predefined source, to automatically populate these fields with values in the evaluation.

User fields are supplied in the following cases:

- When you create a new form, you can choose Evaluation Custom Data (ECD) values in the Header. These values are auto populated by administrative type fields (for example, Organization association, pbx_id, and so on).
- When an evaluator fills in a new evaluation or assessment for an agent and submits the evaluation or assessment, the information for these fields can be seen or edited by all evaluators with the relevant access right.

This topic includes the following information:

- [Auto-populating ECD Values](#), page 120
- [ECD Field Values for Form Designer](#), page 121
- [ECD Skills Field](#), page 122

See “[Generating New Form Versions](#)” on page 132 for information on how modifying ECD fields affects the form version.

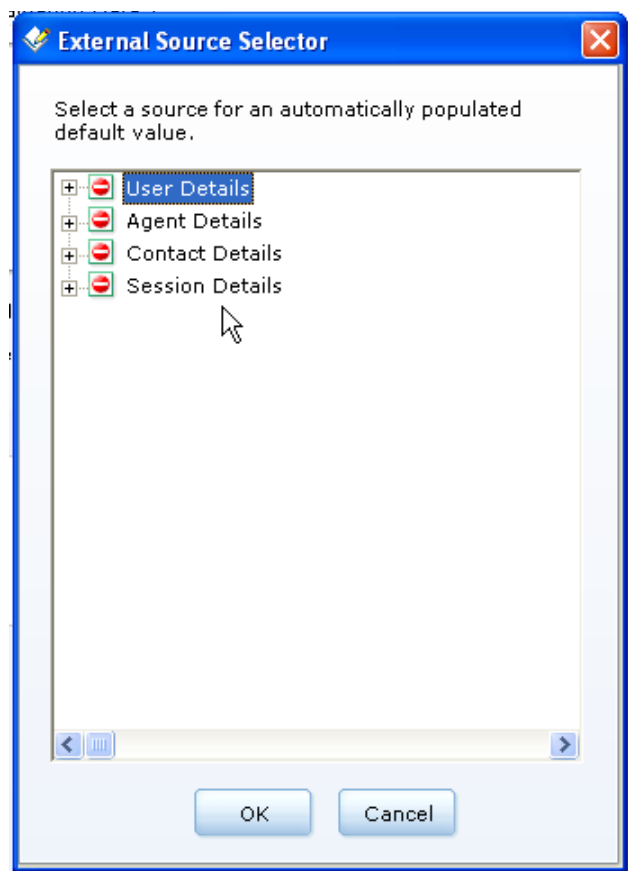
Auto-populating ECD Values

To define form Header properties with auto-population of ECD values from the inContact Portal:

- 1 In the Form Designer window, select the form name in the navigation tree.
The Form Properties pane is displayed on the right.
- 2 Click the **Header** tab.
- 3 To add a new ECD property, select **Add Evaluation Data**.
The new ECD property control appears.

The screenshot shows the Form Designer interface with the 'Header' tab selected. The 'Header Name' field contains the text 'Details'. Below this, the 'Custom Data' section is empty, and a tooltip labeled 'Add Evaluation Data' is visible over the area. At the bottom, the 'View' section contains two checked checkboxes: 'Collapse Header' and 'Display Header Comments'. The top of the window has a toolbar with various icons and a 'Back To List' button.

- 4 To select the value to be populated in the field from the list of values, click **Get Value**.
The **External Source Selector** window opens, with a list of fields grouped by categories.



- 5 Select the required data value to auto populate the form field from the fields in the categories.
- 6 Click **OK** to complete the operation.

ECD Field Values for Form Designer

The following table presents the ECD values that are available for users who create or edit forms, using the following external source categories:

- User Details—User system identity, contact, employment, and hierarchy information
- Agent Details—Agent system identity, contact, employment, and hierarchy information
- Contact Details—Contact ID, statistics, dialing, and time information
- Session Details—Session ID, statistics, time, media, and logistics information

User Details	Agent Details	Contact Details	Session Details
inContact ID	inContact ID	Contact ID	Contact Segment ID
Display Name	Display Name	Dialed From (ANI)	inContact Acquisition Database ID
User Name	User Name	Dialed To (DNIS)	Acquisition Module
Start Date	Start Date	Direction	Channel
Conditional Custom Data 1-15	Conditional Custom Data 1-15	Number of Holds	Start Time
Supervisor	Supervisor	Number of Transfers	End Time
Team Lead	Team Lead	Number of Conferences	Exception
Organization	Organization	Total Hold Time	Extension
E-mail Address	E-mail Address	Duration	PBX ID
Job Title	Job Title		With Screens
Is Supervisor	Is Supervisor		Wrap-up Time
Is Team Lead	Is Team Lead		Switch Call ID
User Defined Field (UDF) 1-10	User Defined Field (UDF) 1-10		Switch
Employee Type	Employee Type		Custom Data 1-75
Skills 1-10	Skills 1-10		Conditional Custom Data 1-15
End Date	End Date		Duration
Rank	Rank		

ECD Skills Field

Administrators create, copy, edit, delete, import, or export employee skills in the User Management tabs. A skill definition includes the following information:

- Skill—The name of the skill.
- Media Type—The type of media associated with the skill, such as phone or email
- Description—An optional description of the skill.
- Organization—The organization owning the skill.

You can select up to ten skills. The skill values are passed as prioritized values, from highest to lowest. If two skills have the same priority, they are ordered alphabetically.

If you select a discontinuous skill, a warning message is displayed: "You have assigned lower priority skills - skill xxx, without assigning a higher priority skill first. Are you sure you want to continue?"

Defining Form Status Options

You can add and configure two optional status fields in the form footer to provide additional information to aid data collection. When you design a form, the status values are chosen from a predefined list. During form fill-in, the user can select the values from a drop-down list.

Form status captions are customized per system in the Caption Editor system tool, and cannot be defined during the form design stage: However, the status and values can be defined in the Form Designer by users with the corresponding right.

For example, you can create a Discussion status, with a list of values such as **to be discussed with the manager**, **to be discussed with the head of department**, and so on.

Use the following procedure to define Status data:

- 1 Click **Shared Data** on the toolbar of the Form List window. The Shared Data Manager dialog box appears.
- 2 Click the **Status** tab.
In the left pane, the status fields are displayed with the captions that were customized for your system.
- 3 Select a caption and edit its data in the right pane.
- 4 In the **Status** section, select one of the following options:
 - **Not Active**: The status does not appear in the form
 - **Active**: The status appears in the form
- 5 To add values to the status:
 - a. In the table, click **Add** or **Delete** to add or delete a row in the table.
 - b. Click the **Caption** field and enter the value.
 - c. Each status value can have its own status. Click the **Status** field, and select one of the following from the list:
 - **Under Construction**: Status values can be added and deleted.
 - **Published**: The status cannot be deleted, but values can be added. The status can only change from Published to Hidden.
 - **Hidden**: The set status is not available for new forms, but is still used in old forms.

NOTE



To be used by other forms, a linked form must have the Published status. Hiding a linked form disconnects it from any forms that currently use it, and changes the questions in those forms to regular questions that can be edited, irrespective of the linked form.

6 Do one of the following:

- Click **OK** to save the data.

The changes are saved, the **Shared Data Manager** dialog box closes, and you return to the Form List.

- Click **Cancel** to restore the last saved data.

Defining Form Rating Sets

You can configure a form to display a rating in the footer of the form. A rating is a verbal translation of the achieved score based on the form calculation.

For example, when you select the Medium Ratings rating set from the list in the footer, this translates as a score of 50-70 points.

The values for the rating set are defined per form, but you must have the Manage Data right to define a rating set and Caption Editor system tool rights to configure the rating set captions.

You can use the following procedures to define form rating sets:

- [Adding a Rating Set](#), page 124
- [Adding a Value to the Rating Set](#), page 125
- [Deleting a Rating Set](#), page 125

Adding a Rating Set

- 1** Click **Shared Data** on the toolbar of the Form List Window.
The Shared Data Manager dialog box appears.
- 2** Click the **Ratings** tab.
- 3** To add a rating set to the Ratings List, click **Add**, to the right of the Ratings List box.
The new rating appears at the end of the list.
- 4** Select the new rating in the Ratings List.
- 5** In the right pane, enter a name for the set in the **Name** field.
- 6** In the **Status** field, select the rating set status from one of the following:
 - **Under Construction**: The rating values can be edited and deleted.
 - **Published**: The rating set cannot be edited or deleted. The rating set can only change from Published to Hidden.
 - **Hidden**: The rating set is not available for new forms but is still used in old forms.

Adding a Value to the Rating Set

- 1 To add or delete a row in the Values table, click **Add** or **Delete**.
- 2 Click the **Caption** field and type a caption. For example, Excellent, Good, and so on.
- 3 Click the **From** field and enter the lowest score for the value.
- 4 Click the **To** field.
The field is automatically populated when you click **Add** to add another value.
- 5 To change the value, enter the highest score of the range.
- 6 To to automatically populate the next range, click **Add**.
- 7 To change any of the rating set values, click the value and enter the new score.

Deleting a Rating Set

You can only delete rating sets with the Under Construction status. Published sets cannot be deleted: They can only be hidden.

- 1 Select the rating set from the list in the left pane.
- 2 Click **Delete** above the list.
- 3 Do one of the following:
 - Click **OK** to save the data.
 - Click **Cancel** to restore the last saved data.

The **Shared Data Manager** dialog box closes, and you return to the Form List.

Defining Form Reason Fields

You can include a reason field to provide an explanation of the answer or scoring for any question. When the user fills in the form, the reason field appears as a drop-down list of values.

For example, for the question, **Did the operator answer the phone promptly?**, if the answer is No, a list of reasons for the answer can include the following responses: The operator was not at his desk, the telephone was malfunctioning, and so on.

You must have the **Manage Data** right in User Management, in the Roles Setup tab, to define reason fields.

You can use the following procedures to define form reason fields:

- [Adding and Editing Reasons](#), page 126
- [Deleting a Reason](#), page 126

Adding and Editing Reasons

- 1 Click **Shared Data** in the toolbar of the Form List window.
The Shared Data Manager dialog box appears.
- 2 Click the **Reasons** tab.
- 3 Do one of the following:
 - Add a new reason:
 - i. Click **Add**.
The new reason appears at the end of the Reasons List.
 - ii. Define the reason in the right pane.
 - Edit or name an existing reason (Under Construction status), do one of the following:
 - Select a reason from the list and edit the fields in the right pane.
 - Enter a name in the **Name** field.
- 4 In the **Status** field list, select a status for the reason from one of the following:
 - **Under Construction**: The reason can be edited and deleted.
 - **Published**: The reason cannot be edited or deleted. The reason can only change from published to hidden.
 - **Hidden**: The reason is not available for new forms but still used in old forms.
- 5 Click **OK** to save the reasons.
The changes are saved, the **Shared Data Manager** dialog box closes, and you return to the Form List.

Deleting a Reason

- 1 Select the reason in the list and click **Delete**. A published reason cannot be deleted.
- 2 Click **OK** to save the reasons.
The changes are saved, the **Shared Data Manager** dialog box closes, and you return to the Form List.

Creating Shared Components

When you design a form, you can create new components (sections, categories, or questions) or reuse shared components.

Shared components are entire sections, categories, or questions with configured values and properties that are specifically created and saved for reuse in other forms. For example, if you create a generic **Start** section, you can save it and reuse it in other forms.

Using shared components across many forms helps you maintain consistency and saves time by reducing the need to create duplicate information.

To create shared components in the Form Designer, you must have the **Global Components Management** right in User Management.

You can use the following procedures to create shared components:

- [Creating a Shared Section](#), page 127
- [Creating a Shared Category](#), page 128
- [Creating a Shared Question](#), page 128



You can include a single instance of each shared component per form. See “Adding Shared Form Components” on page 58

Creating a Shared Section

- 1 Click **Shared Components** in the toolbar of the Form List window.
The **Shared Component Manager** dialog box opens.
- 2 In the Shared Sections tab, click **Add**.
A new row appears for a shared section in the table.
- 3 To display shared sections with the Hidden status in the table, select the **Display Hidden** check box above the table.
- 4 To set the status of the new shared section, in the **Status** column of the table, click the **Status** field of the new shared section and select one of the following statuses from the list:
 - **Under Construction**: The shared section can be edited and deleted.
 - **Published**: The shared section cannot be edited or deleted. The shared section can only change from published to hidden.
 - **Hidden**: The shared section is not available for new forms, but is still used in old forms.
- 5 In the lower pane of the dialog box, in the **Name** field, type a name for the shared section.
- 6 In the **Recommended Points** field, type the points to award for the section.
- 7 In the **Description** field, type free text description, if required.
- 8 Click **OK**.
The changes are saved, the **Shared Data Manager** dialog box closes, and you return to the Form List.

Creating a Shared Category

- 1 Click **Shared Components** in the toolbar of the Form List window.
The **Shared Component Manager** dialog box opens.
- 2 Open the **Shared Categories** tab and click **Add**.
A new row appears for a shared category in the table.
- 3 To display shared categories with the Hidden status in the table, select the **Display Hidden** check box above the table.
- 4 To set the status of the new shared category, in the **Status** column of the table, click the **Status** field of the new shared category and select one of the following statuses from the list:
 - **Under Construction**: The shared category can be edited and deleted.
 - **Published**: The shared category cannot be edited or deleted. The shared category can only change from published to hidden.
 - **Hidden**: The shared category is not available for new forms, but is still used in old forms.
- 5 In the lower pane of the dialog box, in the **Name** field, type a name for the shared category.
- 6 In the **Recommended Points** field, type the points to award for the category.
- 7 In the **Description** field, type a free text description, if required.
- 8 Click **OK**.
The changes are saved, the **Shared Data Manager** dialog box closes, and you return to the Form List.

Creating a Shared Question

- 1 Click **Shared Components** in the toolbar of the Form List window.
The **Shared Component Manager** dialog box opens.
- 2 Open the **Shared Questions** tab and click the **Add** button.
A new question appears at the bottom of the table. The default text for the question caption can be customized in the Caption Editor system tool.
- 3 Select the **Display Hidden** check box above the table to show the hidden status questions in the table.
- 4 In the status column of the table, click the status field of the new shared question, and select one of the following statuses from the list:
 - **Under Construction**: The shared question can be edited and deleted.
 - **Published**: The shared question cannot be edited or deleted. The shared question can only change from published to hidden.
 - **Hidden**: The shared question is not available for new forms, but is still used in old forms.

- 5 In the lower pane of the dialog box, in the **Question Text** field, type the question.
- 6 In the **Question Type** field, select the question type for the shared question from the list. For a description of each question type, see ["Question Types"](#) on page 48.
- 7 In the **Recommended Points** field, type the points to award for the question.
- 8 In the **Description** field, type a free text description for the shared question.
- 9 In the **Scores** field, enter the scores according to the question type selected. For a description of question scoring, see ["Setting Question Scoring Parameters"](#) on page 54.
- 10 Click **OK**.

The changes are saved, the **Shared Data Manager** dialog box closes, and you return to the Form List.

Defining Default Forms

You use the Default Form feature to select the form that automatically appears when the user wants to review a contact. You can only define default forms if you have the Manage Data right in the User Management tabs.

Default forms are defined according to Conditional Custom Data: You can only define the default forms according to how the Conditional Custom Data fields are defined for your organization (usually by the system administrator).

Which form to display is determined by the Conditional Custom Data field with which the contact is tagged. If the contact comprises multiple segments, the default form is selected according to the Conditional Custom Data field of the first segment.

For example: If a supervisor from marketing wants to review a contact, instead of the supervisor searching for the marketing department form, you can set it to automatically appear as a default for the contact, when the contact is tagged with a relevant Conditional Custom Data field.

- 1 In the Form List window toolbar, click **Shared Data**.
The **Shared Data Manager** dialog box appears.
- 2 Click the **Default Form** tab.
- 3 Select a Conditional Custom Data from the **Conditional Custom Data** list.
- 4 Select either **Evaluation** (Quality Monitoring) or **Assessment** (Customer Xperience), depending on whether the default form is for evaluations or assessments.
- 5 To open the Rules pane for the default form, click **Add Default Form Rule**.
- 6 In the **If** field, select the Conditional Custom Data value from the list.
- 7 To open the **Component Selector** dialog box, in the **Then** field, click the **Component Selector** button.
- 8 From the list of forms in the **Component Selector** dialog box, select the form to open in the users' Interactions Home Page.

- 9** Click **OK** to save and return to the **Default Form** tab.
- 10** To delete a default form rule, select the rule and click **Remove Default Form**.
- 11** Click the **Add Default Form Rule** button to define another default form, or click **OK** to save, and exit the dialog box.

NOTE

If you have defined default forms and change the Conditional Custom Data in the Default Form Name field, you lose all the defined default form rules in the list, and must define new default form rules.

Impact of Modifying Components on New Form Versions and Reports

This topic describes how changes to form components force the generation of a new form version and how new form versions affect reporting.

- [New Form Versions](#), page 132
- [Generating New Form Versions](#), page 132
- [Generating New Component IDs](#), page 133
- [How Form Versions and Component IDs are Related](#), page 134
- [Impact of New Form Versions on Reports](#), page 134
- [Creating a New Form Version](#), page 136

New Form Versions

When you modify a form component, a new form version is created.

Making a change to a textual field does not trigger the creation of a new form version: When a report is generated using the data, the latest question text is shown on the report, and the report provides information on all the evaluations that included this question, both before and after the question text is changed.

Textual fields in a form are:

- Comments
- Captions
- Section or category names and instructions
- Question texts and instructions.
- Revision notes and header or footer instructions in form-level fields.

Non-textual fields are those that affect scoring or calculations, and trigger a new form version. See ["Saving Forms"](#) on page 106 for more information on when the **Save New Version** option is enabled.

For more information on how a new form version can affect the report results and how to create a new form version, see:

- [Defining Form Status Options](#), page 123
- [Generating New Form Versions](#), page 132
- [Generating New Component IDs](#), page 133
- [How Form Versions and Component IDs are Related](#), page 134
- [Impact of New Form Versions on Reports](#), page 134
- [Creating a New Form Version](#), page 136

Generating New Form Versions

Depending on the type of changes you make to a Published or Hidden form, you may be required to save the form as a new form version. The new form version is generated with the status Under Construction. To publish the new form version, change the status of the currently published version to Hidden, and the status of the new form version to Published. See ["Setting Form Status"](#) on page 108, for more information on form status.

A new form version is created whenever you change a form in a way that impacts its layout or its score. More specifically, a new form version is created for the following scenarios:

- Any change that results in a new component ID. See ["Generating New Component IDs"](#) on page 133.
- Any change in the layout or appearance of the form when you select one of the following:

- **General** tab: Hide/Display score, Hide/Display Maximum Score, Form Appearance Defaults
- **Header** tab: Collapse Header, Display Header Comments, Add/Change Custom Data
See "[Generating New Component IDs](#)" on page 133
- **Footer** tab: Collapse Footer, Display Footer Comments, Add/Change Status or Rating
- Any change in the **Calculation** tab.
- Any change in the **Rules** tab.
- Opening a form that uses shared data that was deleted.

New form versions are NOT created for the following scenarios:

- **General** tab: Adding form revision notes or changing captions.
- **Header** tab: Changing the text in the **Header Name** or **Instructions** field, including adding or removing Evaluation Custom Data (ECD) values, or other shared data, such as reasons, status or rating (without modifying other forms that use the shared data).
- **Footer** tab: Changing the text in the **Footer Name** or **Instructions** field.
- **Questions with a list of custom answers**: Changing the text of answer options or adding more answer options for questions that have several custom answer options.

Generating New Component IDs

If the changes you made to the form include changes to specific form components (that is, questions, sections, or categories), in addition to generating a new form version, the system may automatically generate new component IDs for these components.

New component IDs (and hence - also new form versions) are generated for the following scenarios:

- When a new component is created or deleted
- When an existing component is updated in any of the following ways:
 - **Sections and Categories**: Changes to the scoring method, base percentage, precision, baseline score or minimum score.
 - **Sections and Categories**: Changes to any of the viewing options, such as Hide Score, Enable Comment, Collapse, or Hide.
 - **Questions**: Changes to question type, baseline score, minimum score, score/answer values (including deleting an answer option or changing the numeric value of an existing answer option in a list of custom answers), defaults, or options (hide score/mandatory/enable comment/hide question/display question above answer/instructions appear above answer/enable reason).

- **Reason fields** (if enabled): Changes to the reasons associated with questions

New Component IDs are NOT created for the following scenarios:

- When the component name or question text is updated.
- When the instructions associated with the component are changed.
- When a new question is added to a section or category.
- When ECD values change, as follows:
 - When ECD values, or available answers in lists in published forms are added or removed.
 - When ECD values are changed for answer values (for example, when a different answer value is selected from a drop down list).

A removed value is only available during editing if it is selected in the form.

The evaluations that are made before an ECD value is removed from a form are displayed correctly. If an ECD value that is removed from the form is selected, it still appears.

Existing evaluations created with the form before the changes were made can be opened. If the user edits them, they display the new set of question values.

How Form Versions and Component IDs are Related

Each form version identifies its components with a unique component ID.

The new form version references all its components, including the new or changed components, by their component IDs.

Impact of New Form Versions on Reports

When you create a new form version, or perform an action that generates a new component ID, you must consider how the changes might affect reporting. The following use cases are associated with how new versions of a form impact the reporting:

- [Use Case 1: Selecting Specific Form Components for a Report](#), page 135
- [Use Case 2: Running the Evaluation Summary per Agent/Group Reports or Calibration Report by Question](#), page 135

For all other reports and use cases (except the reports specified in use cases 1 and 2), the report result includes all the scores and components that were filled in for the selected forms, according to the date/time and other filters set in the report, regardless of which form version was used. See the Reports for more information.

Use Case 1: Selecting Specific Form Components for a Report

The form components that are displayed when you select form components to include in the report are the form components that are associated with the latest form version and thus have the latest form component IDs.

Changing or deleting a form component results in the following behavior:

- A deleted component does not appear in the list of form components that can be selected.
- Only the evaluations that are performed after the change are associated with the modified form component, because only the most recent component IDs are pulled into the report. In this case, the previous evaluation data that was available for the modified form component is no longer available in the new form version.
- For a changed form component, the **Evaluation Summary per Agent**, **Evaluation Summary per Group** and **Calibration Report by Question** reports pull in only evaluations performed after the form component is changed.

This limitation mostly affects you if you plan to use the **Average Evaluation Form/Form Components Scores** or the **Average Assessment Form/Form Components Scores** reports, because using these reports implies that you are selecting the form components to appear in the report.

This limitation also affects you if you plan to use any of the other score-related reports, such as **Average Evaluation Score per Agent**, when you select specific form components for inclusion in the report.

Use Case 2: Running the Evaluation Summary per Agent/Group Reports or Calibration Report by Question

The report uses evaluations that were performed on all form versions that match the other criteria set in your report filters, such as date/time or group. However, as for the previous use case, the report pulls in only the latest form component IDs.

Changing or deleting a form component results in the following behavior:

- A deleted component does not appear in the report.
- For a changed form component, the **Evaluation Summary per Agent/Group** and **Calibration Report by Question** reports only pull in evaluations performed after the form component is changed. Changed questions show only the scores for evaluations that were performed since the last change.

Creating a New Form Version

It is strongly recommended that you create a new form, with a new name, when you perform one of the following actions, and require the ability to report on previous form versions:

- Filter a report based on components that were defined in previous form versions
- Select specific form components in a report, that were defined in previous form versions
- Delete/modify questions in a way that generates new versions for the form

Creating a new form ensures the availability of the historical data entered in the original form, as well as the current data entered in the new form.

See ["Deleting a Form"](#) on page 113, for more information.

To create a new form version:

- 1 Click **Save As**.

The **New Form Name** dialog box opens

- 2 To save the form as a new version, with a new name, type a new form name and optional description.
- 3 Select the form type.
- 4 Click **OK**.
- 5 Modify the required form component in the new form.

Frequently Asked Questions

What is the effect of deleting a form?

Deleting a form permanently deletes all its records from the system and cannot be undone. Deleted forms are no longer available as filters in searches and Reports. All evaluations that were based on deleted forms are deleted and are no longer available in searches or Reports.

What is the effect of hiding a form?

Hidden forms are not shown anywhere in the Interactions Home Page or Reports application, but appear in the Form List in the Form Designer. Hidden forms can be changed to Published.

Can you republish a hidden form?

Yes, hidden forms can be republished. The republished form is displayed in the Interactions Home Page and in the Reports application. Published forms can only be changed to Hidden. Hidden forms can only be changed to Published.

When is a new form version generated?

New component IDs (and hence - also new form versions) are generated for the following scenarios:

- When a new component is created or deleted
- When an existing component is updated in any of the following ways:
 - **Sections and Categories:** Changes to the scoring method, base percentage, precision, baseline score or minimum score.
 - **Sections and Categories:** Changes to any of the viewing options, such as Hide Score, Enable Comment, Collapse, or Hide.

- **Questions:** Changes to question type, baseline score, minimum score, score/answer values (including deleting an answer option or changing the numeric value of an existing answer option in a list of custom answers), defaults, or options (hide score/mandatory/enable comment/hide question/display question above answer/instructions appear above answer/enable reason).

See ["Generating New Form Versions"](#) on page 132.

What is the impact of new form revisions on reporting?

The following use cases are associated with how new versions of a form impact the reporting:

- [Use Case 1: Selecting Specific Form Components for a Report](#), page 135
- [Use Case 2: Running the Evaluation Summary per Agent/Group Reports or Calibration Report by Question](#), page 135

For all other reports and use cases (except the reports specified in use cases 1 and 2), the report result includes all the scores and components that were filled in for the selected forms, according to the date/time and other filters set in the report, regardless of which form version was used.

See ["Impact of New Form Versions on Reports"](#) on page 134

What is the effect of hiding a shared component already used in forms?

If you are assigned a role that includes the **Global Components Management** right in User Management, hiding a component enables you to temporarily remove a component from the shared components list in the Shared Components Manager. See [Creating Shared Components](#), page 126.

The hidden shared component is not available for new forms, but is still used in old forms.

To see the components with the Hidden status, select the **Display Hidden** check box in the Form Component Manager. Once these components are visible, you can publish them as needed.

What actions can cause a new form version to be activated?

Editing a Published or Hidden form can trigger a new form version, depending on which fields in the form are edited.

Editing only caption and instruction textual fields does not create a new version.

See ["New Form Versions"](#) on page 132.

What happens when a shared component is deleted?

You cannot delete a published shared component, you can only change its status to hidden. The new status applies only to future forms and does not affect forms created before the change in status.

Why did my action fail during system maintenance activities?

If you log into the Interactions Home Page before the scheduled system maintenance activities and continue to work, you may encounter some problems that cause your action to fail. For example, you may experience failures when you try to submit an evaluation, open a contact from the search results list, and so on.

You receive a message that describes the error and what corrective actions to perform. The message can be one of the following:

- User profile or system definitions have been modified. Please log out and log in again for updated changes to take effect. If the problem persists, contact the System Administrator.
- Internal error. Notify the System Administrator to contact technical support.
- Your inContact Interactions Home Page session has expired. Please close all open browser windows and log in to the system again.

The problem may be caused by inContact Interactions and Analytics maintenance activities (by default, system maintenance is scheduled for 3 am).

If required, your system administrator can change the time these maintenance activities are performed, as follows:

- 1** In the **Internet Information Services**, select the relevant application pool.
- 2** To change the default time for recycling, in the **Recycle** tab, select the default time and click **Remove**.
- 3** Enter the preferred time and click **Add**.
- 4** Click **OK**.