Case Summarization

Use Natural Language Processing (NLP) to summarize the text in the subject field and email interactions.

Restriction

- Text summarization is tested only for English language texts.

- Text summarization is applicable only for email based interactions between a customer and a service agent.

- Text summarization is available only for email interactions generated from Outlook and Gmail.

- For existing cases, a summary is generated only when a new interaction is added (after model activation).

- There's a delay between sending or receiving interaction and summary updates. Text summarization takes place asynchronously from the email communication. The delay depends on the number of interactions in the queue and the number and size of the interactions.

Configure Case Summarization

As an administrator, you must add, train, test, and activate the Case Summarization model.

Procedure

1. Navigate to your user profile, and select Settings All Settings Machine Learning Intelligent Service Case Summarization.

2. Under Case Summarization , click the create icon (⯑) to add a model.

3. Enter a name for your model.

4. Click Save and Train to save your model and start the training.

The model goes through the following statuses during the training: Created Training in Preparation Data Extraction is Pending Data Extraction is in Progress Data Preprocessing is Pending Data Preprocessing is in Progress Training Triggered Training is Pending Training in Progress Training Completed or Training Failed Active or Inactive.

Get Status from the You can refresh and update the training status of the model by selecting Actions (⯑) menu.

Note

You can also save your model and train your model later.

You can refresh and update the training status of the model by selectingLocate your model and click Train from the Actions (⯑) menu to start training the model.

5. After the training is complete, click Activate from the Actions (⯑) menu to activate the model.

You can deactivate a model by selecting Deactivate.

Note

You can use the test console to test if the model is functioning correctly. Select your model, enter a Case ID in the Input field and click Summarize. The test console invokes the prediction model API using the sample case data you provide.

Restriction

There's an upper limit on the number of interactions summarized for test purposes. Hence, you may not see all interactions in the summary.

View Case Summarization

View the case summary results.

Procedure

1. Log into your solution and go to Cases.

2. Open a case in detailed view using the ⬚ icon.

3. Go to the Summary tab to view the summary of each interaction.

You can see an overall summary, a summary of agent-generated interactions, and a summary of customer interactions.