Composer Help

Classify Interaction Block

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Classify Interaction Block

Contents

Use to have Universal Routing Server instruct Classification Server to assign one or more category codes (configured in Knowledge Manager as described in the *eServices 8.1 User Guide*) to a text-based interaction. Once a category code is assigned, other types of processing can occur based on the category code.

ECMAScript Functions

- For classification segmentation, a ClassifyInteraction ECMAScript function (`containsCategoryName`) determines if a particular category name exists in the array of category objects represented by an application variable. This variable can be the output of the "Classify Interaction" block, enabling the Branching block to be used for segmentation based on category.

- Another ECMAScript function (`attachCategory`) allows you to manually attach Classification categories to interactions, and then (optionally) segment interactions to different logical branches based on the different categories. The category or categories to be attached to an interaction can be based on classification applied to the interaction at a prior point in the routing workflow.

Both of the above functions are available in Expression Builder > `Workflow Functions` > `Misc.`

Classification Versus Screening

The primary difference between classification and screening (Screen Interaction block) is as follows:

- The result of screening for certain words or patterns is a Screening Rule name and the value of true or false.

- The result of classification based on content analysis (you must have the Content Analyzer option installed as described in the *eServices 8.1 User Guide*) is a category code, which can be associated with a Standard Response or used for other purposes, such as segmentation.

For more information on screening and classification, see the chapter on IRD objects in the *Universal Routing 8.1 Reference Manual*. Also see the *Universal Routing 8.1 Business Process User's Guide*.

Note: If your site's categories are not yet defined in Knowledge Manager, you may wish to use the Screen Interaction block, which performs word matching instead of using category codes.

Use Case

1. An e-mail arrives on a route point, initiating a routing workflow.

2. The routing workflow examines the content of the e-mail and attempts to classify the text based on classification categories set up in Knowledge Manager.

3. An auto-response e-mail is created, using a standard response from the standard response library. The response selected is based on the categorization of the email performed in step 2.

4. The auto-response email is sent to the customer.

The Classify Interaction block has the following properties:

Name Property

Find this property's details under Common Properties.

Block Notes Property

Find this property's details under Common Properties.

Exceptions Property

Find this property's details under Common Properties.

Classification Categories Property

Use to select the location to store resulting classification categories after classification.

1. Click under Value to display the ▦ button.

2. Click the ▦ button to open the Classification Categories dialog box. For **Type**, select **User Data** or **Variable**.If you select **User Data**, specify the User Data key for the classification results. If you select **Variable**, select the variable that contains the User Data key for the classification results.

Categories Property

Use this property to select individual categories and sub-categories of th Root Category to be used in the classification process.

1. Click under Value to display the ▦ button.

2. Click the ▦ button to open the Categories dialog box.

3. Click Add to open the Select Items dialog box.

4. From the Type dropdown menu, do one of the following:

   - If you are connected to Configuration_Server, select **Configuration Server**. Select one or

more categories for the **Value**.

- Select **Literal** and enter the categories in the **Value** field. Use commas to separate the categories.

- Select **Variable** and select the variable that contains the categories from the **Value** field.

Classification Data Property

Use this property to select whether to search for classification data in the interaction's User Data, from a variable, or from the UCS database.

1. Click under **Value** to display the ⬚ button.

2. Click the ⬚ button to open the Classification Data dialog box.

3. For **Type**, select **UCS**, **User Data** or **Variable**. If you select **UCS**, don't specify fields. Data available as part of the interaction is automatically picked up for classification by ORS. If you select **User Data**, specify the key-value pairs. If you select **Variable**, select the variable that contains the key-value pairs.

Classification Server Property

Select the Application name for the Classification Server from those in the Configuration Database. If a Classification Server is not selected, the platform will internally select one.

1. Click under Value to display the ⬚ button.

2. Click the ⬚ button to open the Application Selection dialog box.

3. The next step depends on whether you are connected to Configuration Server.

- You can also select **Literal** or **Variable** from the **Type** dropdown menu. If you select **Literal**, enter the name of the classification server in the **Value** field.   If you select **Variable**, select the variable from the **Value** field.

- If you are connected, select **Configuration Server** from the **Type** dropdown menu. Select the name of the Classification Server from the **Value** field.

Confidence Level Property

Select a variable that contains a number from 1 to 100 that reflects the minimum relevance percentage that each classification category must have in order for Classification Server to consider an interaction as belonging to that category.

Root Category Property

Select the name of the top-level category to be used for the classification.

1. Click under Value to display the ⬚ button.

2. Click the ⬚ button to open the Root Category dialog box.

3. The next step depends on whether you are connected to Configuration Server.

   - If you are connected, select **Configuration Server** from the **Type** dropdown menu. A tree of classification categories appears in the **Value** field. Next, select the name of the top-level (root) classification category. This is a directory that appears in Configuration Manager in the `Business Attributes > Category Structure` folder. For more information on Root folders, see the *Universal Routing 8.1 Reference Manual*.

   - You can also select **Literal** or **Variable** from the **Type** dropdown menu. If you select **Literal**, enter the name of the root category in the **Value** field.If you select **Variable**, select the variable that contains the root category from the **Value** field.

Subcategories Property

Click the down arrow and select one of the following:

- **Do not include children of selected categories.**
- **Include immediate children of selected categories.**
- **Include all children (recursively) of selected categories.**

Condition Property

Find this property's details under Common Properties.

Logging Details Property

Find this property's details under Common Properties.

Log Level Property

Find this property's details under Common Properties.

Enable Status Property

Find this property's details under Common Properties.

ORS Extensions Property

Starting with 8.1.4, Composer blocks used to build routing applications (with the exception of the Disconnect and EndParallel blocks) add a new ORS Extensions property.