Composer Help

Screen Interaction Block

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Screen Interaction Block

Contents

Use this block to filter a text-based interaction for specific content (specific words or patterns) based on evaluation of one or more screening rules by Classification Server. You then have the option of segmenting incoming interactions to different logical branches based on the result of the screening query. Screening rules are created in Knowledge Manager as described in the *eServices 8.1 User's Guide*.

Key-Value Pairs

If Classification Server finds a match, it returns a response that contains the following:

Key	Value
ScreenRuleName	The name of the screening rule.
Id	The actual identifier of the screening rule in the UCS Database.
ScreenRuleMatch	True (if Classification Server finds a match), or False (if it does not find a match).

Use Case

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

2. The e-mail is screened for an account number

3. If a screening rule match is found, the e-mail is provided with an auto-response and then queued to specific queue.

4. If no screening rule match is found, the e-mail is moved to a workbin of the starter agent group.

5. If the e-mail processing or screening itself fails, then interactions are moved to an general interaction queue.

The Screen 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.

3. For Type, select **User Data** or **Variable**.

  - If you select **Variable**, select the variable that contains the key-value pairs to add to the interaction's User Data.

  - If you select **User Data**, specify the key-value pairs to add to the interaction's User Data. The key-value pairs are added to the Interaction's User Data with a prefix of `gdata:udata/` during runtime.

Key Value Pairs Property

Select the location to store the resulting key-value pairs after screening rules are applied.

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

2. Click the ... button to open the Key-Value Pairs dialog box.

3. For Type, select **User Data** or **Variable**.

  - If you select **User Data**, specify the key-value pairs to add to the interaction's User Data. The key-value pairs are added to the Interaction's User Data with a prefix of `gdata:udata/` during runtime.

  - If you select **Variable**, select the variable that contains the key-value pairs to add to the interaction's User Data.

Matching Rules Property

Select the location to store the IDs of the matched rules and the keywords that matched after screening rules are applied.

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

2. Click the ... button to open the Matching Rules dialog box.

3. For Type, select **User Data** or **Variable**.

- If you select **User Data**, specify the key-value pairs to add to the interaction's User Data. The key-value pairs are added to the Interaction's User Data with a prefix of `gdata:udata/` during runtime.

- If you select **Variable**, select the variable for storing the matched rules and keywords.

Result Type Property

Click the down arrow and select the type of screening result:

- **All**--Select to return screening rule IDs, key-value pairs, and categories.

- **Rules**--Select if you wish to apply all screening rules.

- **Matching Pairs**--Select to return matched pairs of Screening Rule IDs and specific strings of words in the e-mail that matched the screening rules. Classification Server can return specific strings that were matched during the screening process. For example a rule screening for credit card numbers could return the following key-value pair: "Key_credit_number" "1111-2222-3333-4444"

- **Categories**--Select to return only the classification categories associated with the screening rules. This can be used later in the strategy to select a Standard Response.

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.

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

   - You can select **Literal** and enter the name of the classification server in the **Value** field.

   - You can select **Variable** and select the variable from the **Value** field.

Generate Outports Property

Use to segment interactions to take different paths. Select **true** or **false**. When set to true, Composer will generate one outport for each selected screening rule. If the screening data matches the screening rule, then the processing will continue via the corresponding screening rule.

Language Property

Click the down arrow to select the language of the incoming interaction. The selected language determines which screening rules are shown. You must select a language in order for code to be generated.

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

2. Click the ... button to open the Language dialog box.

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

   - If you are connected and want to select a language defined as a Business Attribute in the Configuration Database, select **Configuration Server**. A tree of languages appears in the **Value** field for selection. Otherwise:

   - You can select **Literal** and enter the name of the language in the **Value** field.

   - You can select **Variable** and select the variable that contains the language from the **Value** field.

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. 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*. Otherwise:

   - You can select **Literal** and enter the name of the root category in the **Value** field.

   - You can select **Variable** and select the variable that contains the root category from the **Value** field.

Screening Data Property

Use this property to select whether to search for screening data in the interaction's User Data, from a variable, or from the UCS database. This property works with the Screening Rules property below.

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

2. Click the ... button to open the Screening Data dialog box.

3. For **Type:**

- Select **UCS** to have Classification Server take the screening data from the UCS Database. Leave the **Value** field empty.

- Select **User Data** to have Classification Server take screening data from the UCS Database. Leave the **Value** field empty.

- Select **Variable** to have Classification Server take the screening data from a variable. Select the variable.

Screening Rules Property

Use to specify the screening rules to apply on the screening data specified above.

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

2. Click the ... button to open the Screening Rules 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 screening rules for the **Value**.

   - Select **Literal** and enter the screening rule IDs in the **Value** field. Use commas to separate the screening rule IDs.

   - Select **Variable** and select the variable that contains the screening rule IDs from the **Value** field.

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.