

AI Email Summarization Tool

February, 2026

Overview

This quick reference guide provides instructions on attaching emails to activities in Epic to take advantage of the optional AI Email Summarization feature. With this feature, you can choose to add notes manually or use the AI Summarization feature to generate a summary of a single email automatically. The summarization only applies to the body of the email, not attachments within the email.

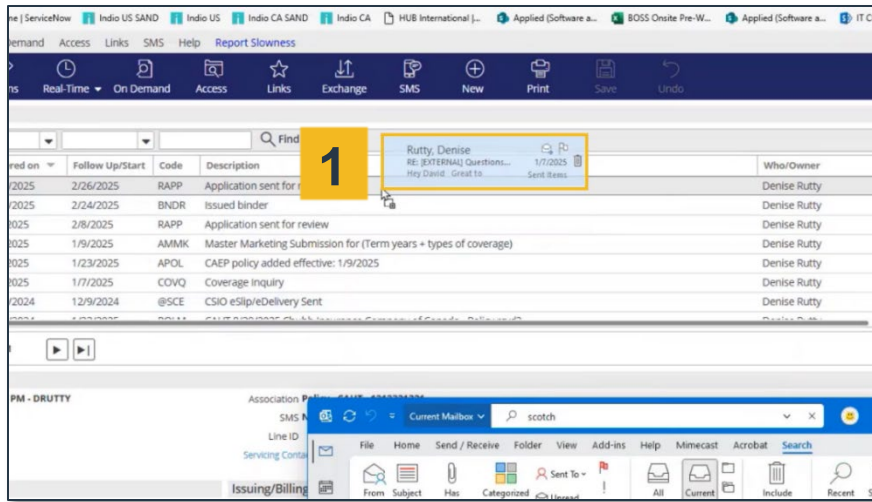
Ways to attach an email to an activity:

1. Drag and drop the email from Outlook onto the Activities list.
2. When sending an Email from Epic or from Outlook using the Attach to Epic option.
3. Use the Outlook Attach to Epic function.

Summarization

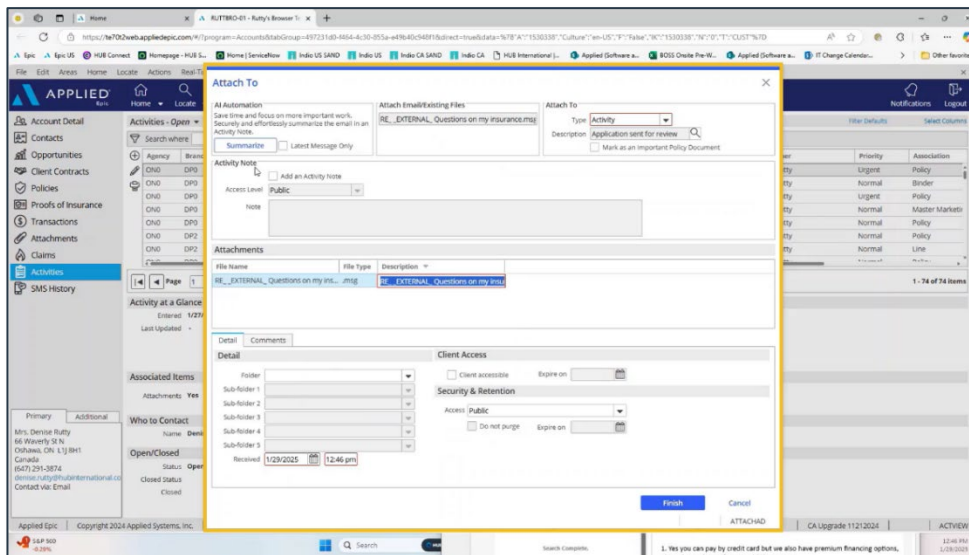
1. **Attach the email** using one of the methods above (e.g., drag-and-drop from Outlook onto the Activities list).

Note: This QRG will show how to use the AI tool through the drag-and-drop feature.



2. The **Attach To** dialog will appear. Verify that the attachment type is accurate, as the “selected” activity should have automatically populated, but can be edited if needed.

Note: If you are using one of the other methods to attach the email to the activity, you will need to select the desired activity.



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3. Choose how to add your note (pick one):

Option A: AI Summarization

- Optional: Select the **Latest Message Only** box if you prefer to only summarize the latest message.
- Click the **Summarize** button in the AI Automation section.
- Wait for processing to complete.
- Review and edit the generated summary as needed.

⚠ Important: Always review AI-generated content before saving.

- Review and set appropriate Activity Access Level.

The screenshot shows the 'Attach To' form in ServiceNow. The 'AI Automation' section is highlighted with a yellow box, containing the text: 'Save time and focus on more important work. Securely and effortlessly summarize the email in an Activity Note.' Below this text are two buttons: 'Summarize' and 'Latest Message Only'. A yellow callout '3A' is overlaid on the 'Summarize' button. The 'Activity Note' section below has a checkbox for 'Add an Activity Note' which is unchecked, and an 'Access Level' dropdown menu set to 'Public'. The 'Attachments' section at the bottom shows a table with one attachment: 'RE_EXTERNAL_ Questions on my insurance.msg'.

Option B: Manual Note

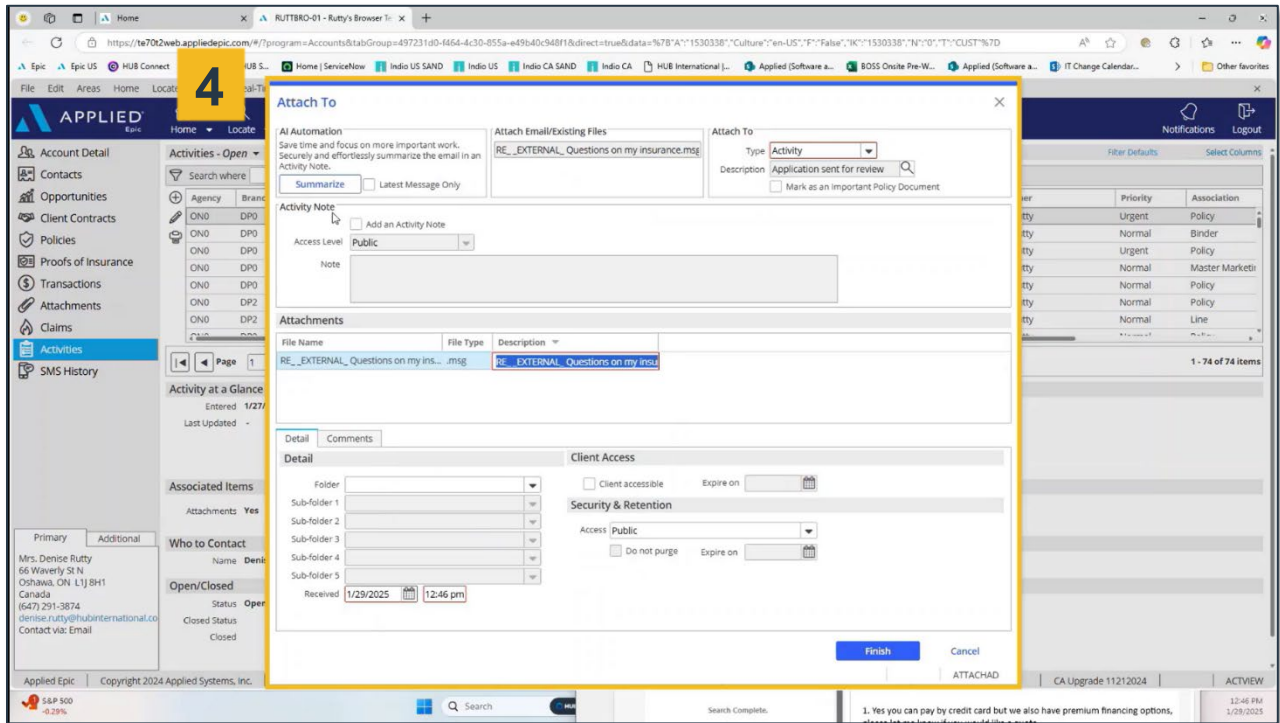
- Check **"Add an Activity Note."**
- Type your note in the Note field.
- Review and set appropriate Activity Access Level.

The screenshot shows the 'Attach To' form in ServiceNow. The 'Activity Note' section is highlighted with a yellow box, containing the text: 'Add an Activity Note'. The checkbox is checked. Below this is an 'Access Level' dropdown menu set to 'Public' and a large text area for the 'Note'. A yellow callout '3B' is overlaid on the 'Add an Activity Note' checkbox. The 'Attachments' section at the bottom shows a table with one attachment: 'RE_EXTERNAL_ Questions on my ins... .msg'.

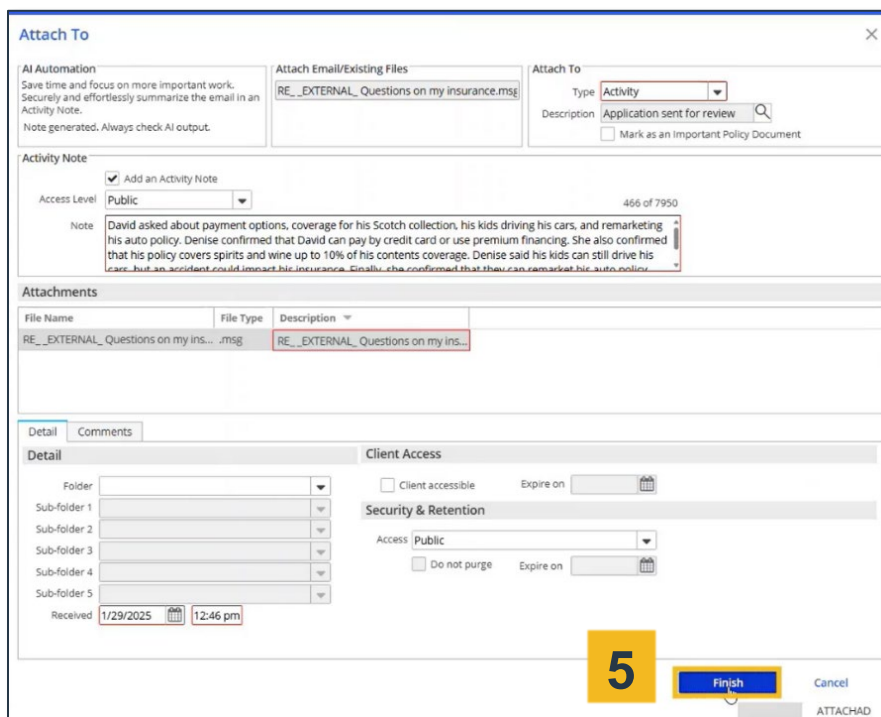
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- The rest of the attachment screen has not changed. Complete all the fields and attachment access levels as needed.
 - Description:** review and enter a valid attachment description.
 - Folders/Subfolders:** Assign folders and subfolders as applicable.
 - Client Access (CSR24):** Configure client accessibility and expiration if needed. (Most likely will not be needed since emails are not typically a document you would share with the client).
 - Security & Retention:** Set appropriate attachment access level.



- Select **Finish** to save the activity with your email and note.



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Quick Tips

- The email attachment is always saved regardless of which note option you choose.
- Use "Latest Message Only" when wanting to summarize only the last message within an email thread.
- You can edit AI-generated summaries before saving.

Additional Assistance

For additional assistance, please: 1) Visit the [HUB Service Desk](#), 2) Call 1-888-677-6948 to open a Ticket, 3) email training@hubinternational.com to ask a question.