PeopleSoft®

PeopleSoft Enterprise Real-Time Advisor 8.9 PeopleBook

June 2004

PeopleSoft Enterprise Real-Time Advisor 8.9 PeopleBook
SKU CRM89ADV-B 0604

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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

See *About These PeopleBooks*, “ISO Country and Currency Codes,” ISO Country Codes.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Appendix A, "ISO Country and Currency Codes" ISO Currency Codes.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

	you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

PeopleSoft Enterprise CRM Real-Time Advisor Preface

This section discusses:

- PeopleSoft application fundamentals.
- Business object management.
- Product and item management.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise 8.9 CRM Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews

  This part discusses tools that are available to manage product portfolios.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook

The *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook has these parts:

- Business Object Management Basics.

  This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

  This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

  This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

  This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

  This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook

The *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook

CHAPTER 1

Getting Started with PeopleSoft Enterprise Real-Time Advisor

This chapter provides an overview of PeopleSoft Real-Time Advisor and discusses:

- PeopleSoft Real-Time Advisor business processes.
- PeopleSoft Real-Time Advisor integrations.
- PeopleSoft Real-Time Advisor implementation.

PeopleSoft Real-Time Advisor Overview

PeopleSoft Real-Time Advisor is part of the CRM Marketing suite of products. The integration between dialog marketing functionality and the Real-Time Advisor, enables increasingly robust, interactive campaigns and marketing experiences by providing a roadmap of questions that lead to specific answers using AAF (active analytic framework) profiles. With PeopleSoft Real-Time Advisor, you collect buyer information and use that information to match buyers with products, services, or solutions. For example, the Marketer can specify what conditions drive each question. This can lead to Call Center cases getting flagged when there is an upsell opportunity. The Call Center Agent can then ask the coordinating questions to increase revenue.

PeopleSoft Real-Time Advisor performs a needs analysis through a series of questions and answers, called dialogs. Applying weights and target group information, PeopleSoft Real-Time Advisor ranks and recommends applicable products, services, or solutions based on the answers and information pulled from the environment. As delivered, PeopleSoft Real-Time Advisor recommends products, but the application can also be extended to recommend objects outside the PeopleSoft CRM product data model.

PeopleSoft Real-Time Advisor Business Processes

With PeopleSoft Real-Time Advisor, you can:

- Create a highly configurable, intuitively interactive dialog that delivers recommendations within the parameters you define in the Advisor Workbench tool.
- Gather information about a user and perform a needs analysis to determine the best object to recommend.
- Embed AAF terms into questions and explanations to personalize a user’s experience while gathering information.
- Target users through questions and answers or from known user information.

  Each user is categorized into one or more target groups that are mapped to characteristics through an internal weighting system. This process produces a list of recommended objects that best suits the user’s needs.

- Control how recommendable objects are weighted within a target group.

  This weighting determines the choices that make up the recommendation list. By giving higher weights to aspects of products or services that you want to promote, products or services become the primary choices for a given target group.
- Tailor each user's page path dynamically according to previous answers that the user has provided or from known information from the system.
- Pull information from the system or about the customer from the AAF and use it to segment users and influence recommendations, or determine the user's experience.
- Provide each user with a choice of recommendations and the ability to compare those alternatives.
- Automate dynamic cross selling and up selling to increase revenue and average selling prices.
- Deliver recommendations at any time.
- Integrate PeopleSoft Real-Time Advisor with a recommendation source other than the CRM product model to recommend objects other than products, such as courses, services, or solutions.

PeopleSoft Real-Time Advisor Integrations

PeopleSoft Real-Time Advisor integrates with the PeopleSoft CRM Product Data Model and CRM Catalog. It uses the product data model as its system-delivered pool of objects from which to recommend. Real-Time Advisor can be used in product relationships for static cross sell and up sell and through the AAF, Real-Time Advisor can be used for dynamic cross sell and up sell opportunities.

PeopleSoft Real-Time Advisor Access Points

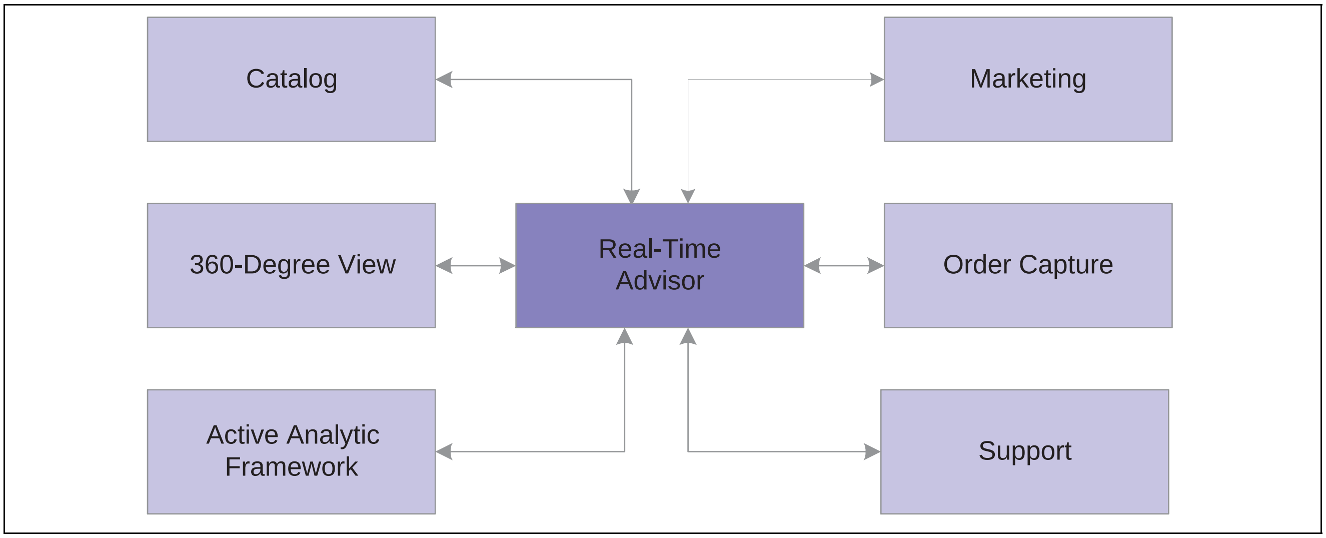
PeopleSoft Real-Time Advisor can be invoked directly from:

- PeopleSoft Order Capture.
- PeopleSoft Order Capture Self-Service.
- PeopleSoft Mobile Order Capture.
- PeopleSoft CRM Catalog.
- PeopleSoft CRM industry-specific solutions that rely upon order-entry functionality or the CRM catalog.

With the addition of the AAF, PeopleSoft Real-Time Advisor can also be indirectly invoked from:

- Support and HelpDesk cases.
- 360-degree view.
- Marketing waves.
- Order Capture.

The following diagram illustrates the PeopleSoft CRM applications that can launch PeopleSoft Real-Time Advisor dialogs:



Launching Real-Time Advisor

Integration with CRM Applications

PeopleSoft Advisor, PeopleSoft Order Capture, PeopleSoft Order Capture Self Service and other CRM applications reside in the same database so that process flows between these applications are smooth and there is typically no need for any integration-specific configuration.

For example, if you license both PeopleSoft Real-Time Advisor and PeopleSoft Order Capture, you automatically have the ability to create product or service recommendations directly from the order entry form.

CRM applications use Real-Time Advisor in the following ways:

- Order Capture uses Real-Time Advisor to help Customer Service Representatives find the right product for a customer.
- Catalog uses Real-Time Advisor to give product recommendations and to offer help in finding the right product for the user.
- Support uses Real-Time Advisor to offer cross sell or up sell functionality during case creation or maintenance.
- Marketing waves can use Real-Time Advisor to cross sell or up sell products or services through direct activity channels.
- Through the AAF, Order Capture can offer dynamic cross sell or up sell functionality with Real-Time Advisor when a product is added to the order or for other events on the order.
- Through the AAF, products and services are displayed in the 360-degree view as cross sell or up sell opportunities when the customer view is brought up or the customer's role is changed.

Integration with Other PeopleSoft Data Models

Real-Time Advisor is also designed to work with other PeopleSoft data models as well as the data models of external systems. It can use either data set as the basis for a recommendation pool.

See Chapter 3, "Preparing the PeopleSoft Real-Time Advisor Environment," page 9.

PeopleSoft Enterprise Real-Time Advisor Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Note. Generally, someone familiar with PeopleSoft records and databases, such as an information technology (IT) manager, performs advanced setup tasks (including environment setup) for PeopleSoft Real-Time Advisor, while the equivalent of a marketing manager, who is familiar with both products and users, creates the dialogs.

Setup in Calling Applications

The specifics of the integration between PeopleSoft Real-Time Advisor and the individual calling applications, takes place in the individual calling application setup pages. You use the setup pages to determine which Real-Time Advisor dialog to run, how it should run, if it should run in quiet or interactive mode, and what should trigger the dialog.

To configure Catalog and Order Capture to use Real-Time Advisor:

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, “Creating Catalogs”.

To configure Support to use Real-Time Advisor:

See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions”.

To configure the AAF for cross selling and up selling:

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework,” Configuring Actions in Policies.

To set up Marketing waves for cross selling and up selling:

See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*, “Setting Up PeopleSoft Marketing and Telemarketing,” Defining Channel Elements.

Other Sources of Information

In the implementation planning phase, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is in the preface of the *PeopleSoft CRM 8.9 Application Fundamentals PeopleBook* with information on where to find the most up-to-date version of each.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft 8.9 CRM Automation and Configuration PeopleBook: Configuring Advisor Actions

CHAPTER 2

Understanding PeopleSoft Enterprise Real-Time Advisor

This chapter discusses PeopleSoft Real-Time Advisor terminology.

PeopleSoft Real-Time Advisor Terminology

PeopleSoft Real-Time Advisor uses several terms frequently in preparing the environment and creating recommendations.

Action

An action represents a possible page action. These actions normally appear as familiar buttons such as Next, Back, Start Over, and Recommend. Based on the action chosen and possibly the transition rules in effect, the next page is presented to the user.

Calling application

Calling applications are the applications that use Advisor dialogs to provide recommendations or to gather data. Calling applications use Real-Time Advisor to cross sell or up sell products and to help the user find the correct product for their needs. Examples of calling applications include PeopleSoft Order Capture, PeopleSoft CRM Catalog, and PeopleSoft Support and HelpDesk.

Characteristics

Characteristics are used by PeopleSoft Real-Time Advisor to help find the right object for the user. They are an aspect of the recommendable object, such as an attribute, feature, or product grouping, which can be used as a basis for providing recommendations.

Characteristic Value

A characteristic value is a specific value of a characteristic that can be used in the weighting model. For example, the Product Group characteristic could have values of Camping Gear or Computers.

Condition

Conditions are logical statements that consist of information about the user or the environment obtained through the AAF (active analytic framework). The information is used by PeopleSoft Real-Time Advisor and can influence recommendations and the flow of the dialog.

Context

A context determines the terms available for use by Real-Time Advisor. The context comes from the AAF and usually is based on the calling application. The context contains information about the calling application including its buffer and functionality to resolve the terms.

Dialog

A dialog is an entity that can be configured to provide recommendations to the user or to collect data. It can be a question and answer session that is presented to a user with the purpose of arriving at a recommendation, or it can be a quiet session that uses information already known about a user to generate recommendations. Additionally, it can be a session to gather information about the user. PeopleSoft Real-Time Advisor uses customer responses, external conditions, and preferences to create recommendations for one or more types of products, services, or solutions. Dialogs can be used for data collection, recommendations, or to cross sell or up sell products and services.

When a dialog runs in Quiet mode, there is no input from the user. Recommendations are generated from input coming from the environment and the AAF. When a dialog runs in Interactive mode, Real-Time Advisor runtime displays pages with questions, and the user's answers influence recommendations.

Display Templates

Display templates determine how dialogs are presented to the user. Preferences, such as the number of recommendations to display, style classes for dialog presentation, page images, the thresholds for the recommendation set, and characteristics of the recommended object to show, are examples of the personalization options available for display templates. Display templates are highly configurable and are used when dialogs are run in either Interactive or Quiet mode.

Explanation

An explanation is typically expository text intended solely for display to the user. It can provide general information about products, services, and solutions, or provide instructions about using the system. There are two types of explanations, freeform text (which can include HTML), or a URL (Universal Resource Locator) link.

Page

A page represents a single set of interactions between a dialog and the end user (or buyer). Within each page, elements are presented to the user in the form of questions and answers, explanations, recommendations, and actions. Pages are highly configurable based on display template controls that you can easily change.

Questions and Answers

Question and answers are inquiries that call for a response from a user. A dialog poses questions to users, and answers determine the target group those users fall into, which may in turn control the flow of the dialog. Question and answer types in PeopleSoft Real-Time Advisor can be Single-Select (for example, an answer can be chosen from a list), Multi-Select (for example, multiple selections can be chosen from a list), Yes/No, Numeric (where a number can be entered), or Freeform Text, (which is used to gather information).

Question Library

A question library contains a set of related questions. For example, a computer question library would contain all questions about computers, including the type of computer that a customer is looking for, memory preference, preferred hard drive size, and so forth.

Recommendation

A recommendation can be any number of products, services, or solutions that are returned by PeopleSoft Real-Time Advisor for presentation to the user. The PeopleSoft Real-Time Advisor recommendation engine relies upon a user's answers to dialog questions and conditions in order to deliver a set of recommendations. A recommendation result set is retrieved from the database tables that are identified during PeopleSoft Real-Time Advisor environment creation.

Target Group

Target groups represent a particular portion of the market. PeopleSoft Real-Time Advisor uses target groups and a recommendation table to determine the products, services, or solutions to recommend to users. Users are put into target groups based on answers to questions and conditions.

Term

Terms are information about the user or environment obtains from the AAF. Terms can be used in questions or explanations to personalize or enhance the user experience. Terms can also be used in conditions to influence recommendations or the flow of the dialog. They are usually context sensitive, meaning that terms available through Order Capture may not be available through Support. Examples of terms include Current Date, Business Unit on the Case, and Business Unit in the Order Capture Header.

Transition Rule

A transition rule represents the logic that controls navigation to a subsequent page. The rule is based upon answers to questions and conditions. Transition logic has a test, a Boolean expression, which is used to determine the destination page if the Boolean expression is true. Transition rules are launched when a user clicks the Next button at runtime.

Weighting Model

PeopleSoft Real-Time Advisor uses a weighting model to generate recommendations. The weighting model is essentially a table generated by the Advisor Workbench tool that contains the weights for a target group mapped against a characteristic value. At runtime, a user's answers to questions and conditions are used to determine the user's target group. The PeopleSoft Real-Time Advisor engine applies the weight to determine a ranked list of recommendations.

CHAPTER 3

Preparing the PeopleSoft Real-Time Advisor Environment

This chapter provides an overview of the PeopleSoft Real-Time Advisor environment preparation and discusses how to:

- Build the PeopleSoft Real-Time Advisor environment.
- Enable a daemon group in PeopleSoft Process Scheduler.

Note. The purpose of this final step, which occurs outside of the PeopleSoft Customer Relationship Management (PeopleSoft CRM) Set Up navigation component, is to accelerate the performance of the recommendation engine. This step must be done to enable the daemon process to ensure accurate and up-to-date recommendations for deployed dialogs.

See Also

Chapter 4, "Setting Up PeopleSoft Real-Time Advisor Dialogs," page 29

Understanding PeopleSoft Real-Time Advisor Environment Preparation

PeopleSoft delivers statuses, steps, actions, and several predefined types to enable PeopleSoft Real-Time Advisor automatically. To take full advantage of the PeopleSoft Real-Time Advisor, you should review all business processes and determine if there are any additional advisor types or characteristics that are appropriate for the recommendation scenarios and dataset.

There are two parts to preparing PeopleSoft Real-Time Advisor for later use by a dialog creator who will create the actual recommendation experience from the Advisor Workbench tool:

1. Define the PeopleSoft Real-Time Advisor environment parameters to make dialog building blocks available for the dialog creator.

   Environment preparation also ensures that the dialog creator operates under the proper constraints. This preparation includes defining actions, steps, statuses, types, and mapping characteristics.

2. Create and start the PeopleSoft Process Scheduler on the application server.

   Create a daemon and add it to the application server that is running PeopleSoft Real-Time Advisor. This ensures that data is managed effectively and is up-to-date for deployed dialog versions.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Building the PeopleSoft Real-Time Advisor Environment

This section discusses how to:

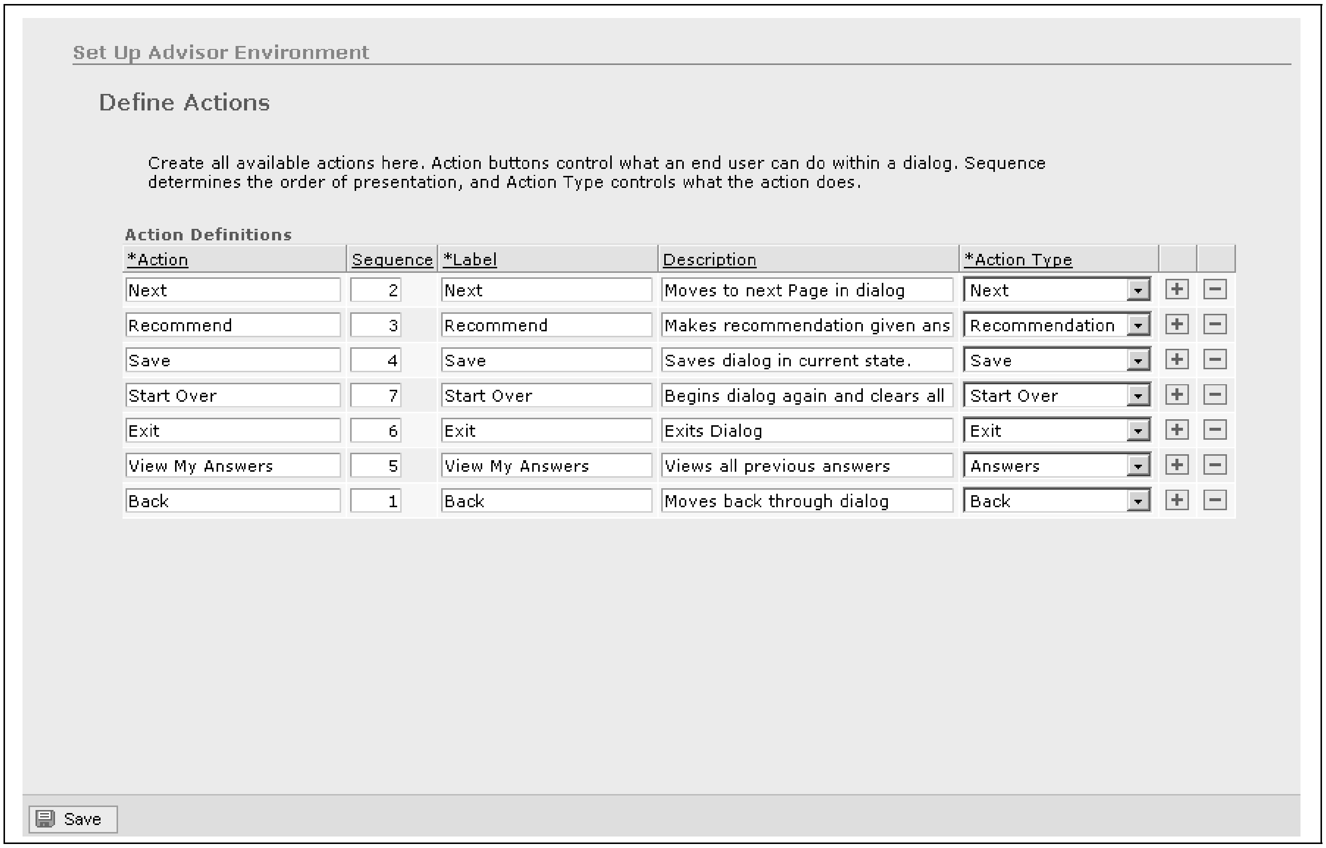
- Define actions.
- Define statuses.
- Define steps.
- Define type.
- Define characteristic mapping.
- Test characteristic mapping.

Pages Used to Build the PeopleSoft Real-Time Advisor Environment

Page Name	Object Name	Navigation	Usage
Define Actions	RAD_ACTIONS	Set Up CRM, Product Related, Advisor, Define Actions	Define all available actions. Action buttons control what an end user can do within dialogs.
Define Statuses	RAD_STATUS	Set Up CRM, Product Related, Advisor, Define Statuses	Define all available statuses. Statuses indicate allowable stages for dialog creation.
Define Steps	RAD_STEPS	Set Up CRM, Product Related, Advisor, Define Steps	Define the steps necessary for a dialog to be created.
Define Type	RAD_ADVISOR_TYP	Set Up CRM, Product Related, Advisor, Define Type	Define the type of dialog to be created. It controls the use and functionality of a dialog.
Define Characteristic Mapping	RAD_CHARACTER_MAP	Set Up CRM, Product Related, Advisor, Define Characteristic Mapping	Define Mappings in order to retrieve data used by the PeopleSoft Real-Time Advisor recommendation.
Test Characteristic Mapping	RAD_REC_ENT_TEST	Set Up CRM, Product Related, Advisor, Define Characteristic Mapping. Click the Test Characteristic Mapping link, select either *Stored Location* or *Value Location* from the available options, and click the Test button.	Test the characteristic mapping of the currently opened definition.

Defining Actions

Access the Define Actions page.



Define Actions page

Actions control the flow of a dialog. They are associated with a given page and are available to the user to make a decision.

Action Definitions

Action Create the actions to be made available for selection from the Advisor Workbench tool. The dialog creator can select which actions appear on a page based on the defined actions. Actions ultimately appear as buttons on the runtime pages. PeopleSoft delivers these actions: *Next*, *Recommend*, *Save*, *Start Over*, *Exit*, *Answers*, and *Back.* There is a 30-character limit.

Sequence Controls the order of the buttons at runtime. Specify the sequence numerically with the lowest number appearing on the left side of the Real-Time Advisor runtime page.

Label The name that appears on the action button at runtime. In most cases the action name is the same as the label. There is a 75-character limit.

Description Enter a description of the action. There is a 254-character limit.

Action Type Describes what the PeopleSoft Real-Time Advisor does when you click the action button.

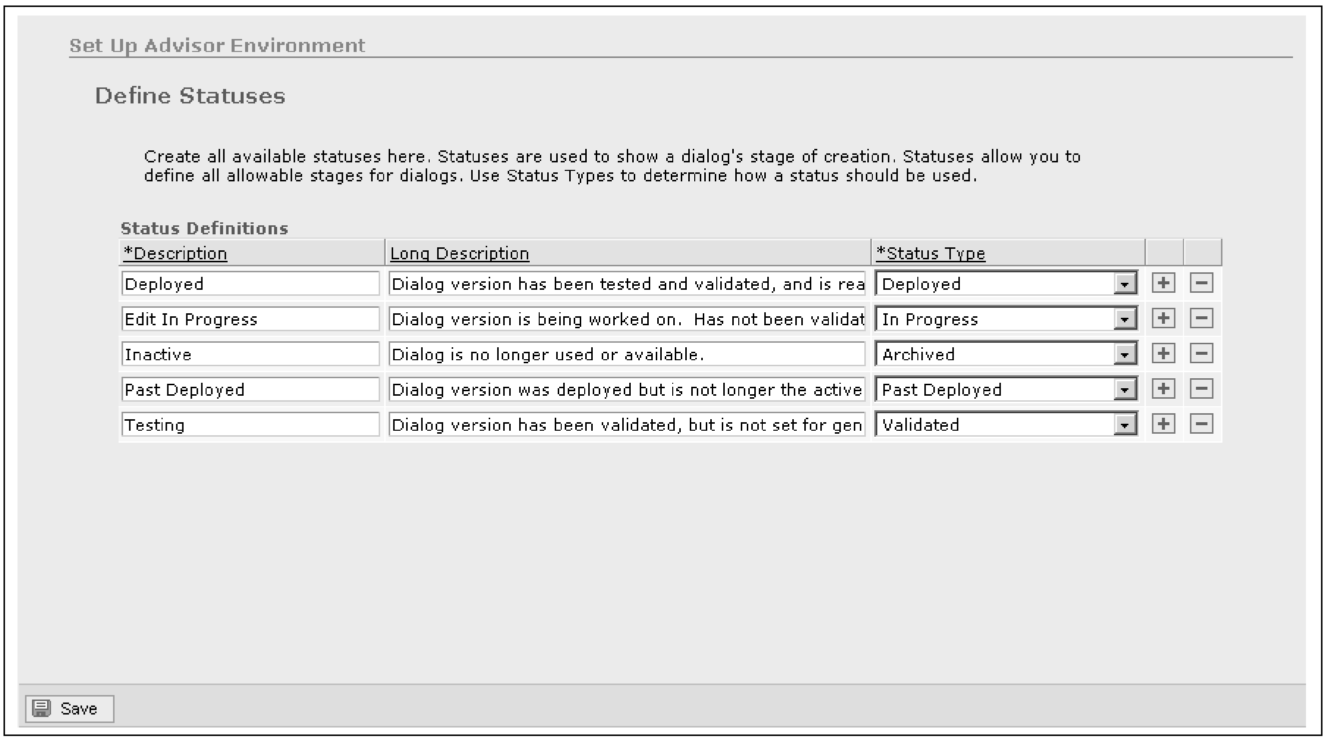
The values are:

- *Answers:* Takes the user to the View Answers page.
- *Back:* Takes the user to the previous page.

- *Exit:* Quits the dialog and returns the user to his or her location prior to calling PeopleSoft Real-Time Advisor.
- *Next:* Takes the user to the next page in the dialog, based on the transitions for the page.
- *Recommendation:* Provides a list of recommendations based upon answers to previous questions and conditions.
- *Save:* Prompts the user for a save name and saves the dialog session in its current state.
- *Start Over:* Clears all of the existing answers and restarts the dialog.

Defining Statuses

Access the Define Statuses page.



Define Statuses page

Status indicates the stage of development for the dialog. User-defined statuses enable flexibility.

Status Definitions

Description

Appears on the Advisor Workbench page describing the state of the dialog. There is a 30-character limit.

Status Type

Determines the state of the dialog version.

Values are:

- *Archived:* Dialog is not currently active.

  No version of the dialog is available to be run. This status is for all versions of the dialog.

- *Deployed:* Dialog version can be run by a calling application.
- *In Progress:* Dialog version is being created or modified.

  It is not currently available for calling applications, because it has yet to be validated and deployed.
- *Past Deployed:* Dialog version was deployed, but a new version has taken its place.

  This version is available only if a saved session requests the version, otherwise the version of the dialog that is deployed will be run.
- *Validated:* Dialog version has been validated and is ready to be tested or deployed.

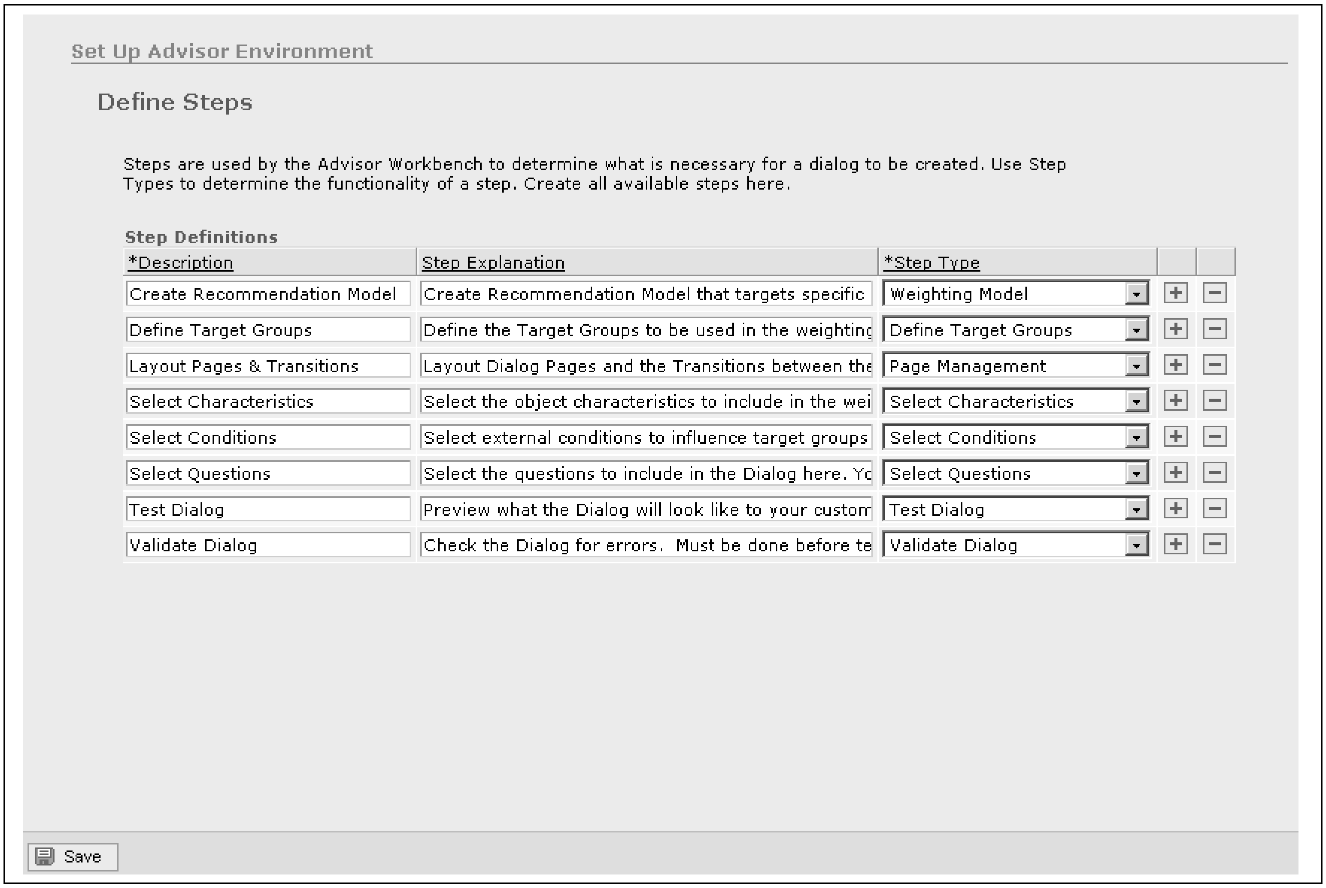
Note. If a dialog is deployed, then the deployed version is available to calling applications. If the dialog is edited subsequent to deployment, a new version is created and used by the Advisor Workbench tool. The deployed version is still available for use by a calling application and is not changed.

If the edited version or the version in progress is subsequently deployed, then that version automatically becomes the deployed version. Any in progress versions are not available to calling applications until they are validated and deployed.

If the status of the dialog is set to *Archived,* then *all* versions of the dialog are inactive and no longer available to run.

Defining Steps

Access the Define Steps page.



Define Steps page

Advisor types can have different dialog creation steps.

Step Definitions

Description Enter the name of the step. There is a 30-character limit.

Step Explanation Enter the description of the step. This description appears to the dialog creator in the Advisor Workbench tool. There is a 75-character limit.

Step Type Select what the Advisor Workbench tool does when the step is activated.

Values are:

- *Define Target Groups:* Define the target groups to be used in the weighting model.
- *Page Management:* Layout dialog pages and the transitions between them.
- *Select Characteristics:* Select the object characteristics to include in the weighting model.
- *Select Conditions:* Select external conditions to influence target groups and transitions.
- *Select Questions:* Select the questions to include in the dialog here.

  Select them from an existing question library or create them from scratch.
- *Test Dialog:* Preview how the dialog will appear to customers.

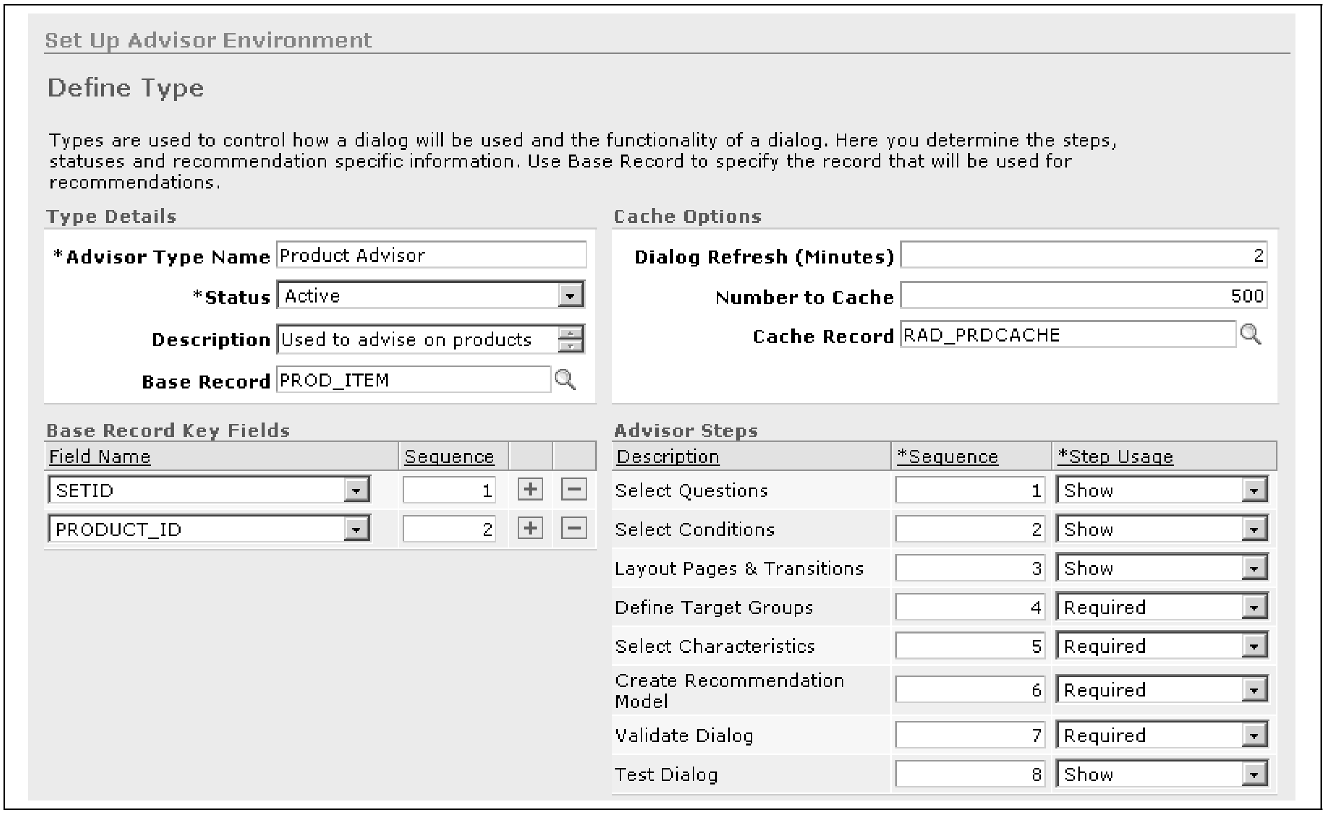
- *Validate Dialog:* Check the dialog for errors. This validation must be done before testing or deploying the dialog.

  This step automatically saves before validation.

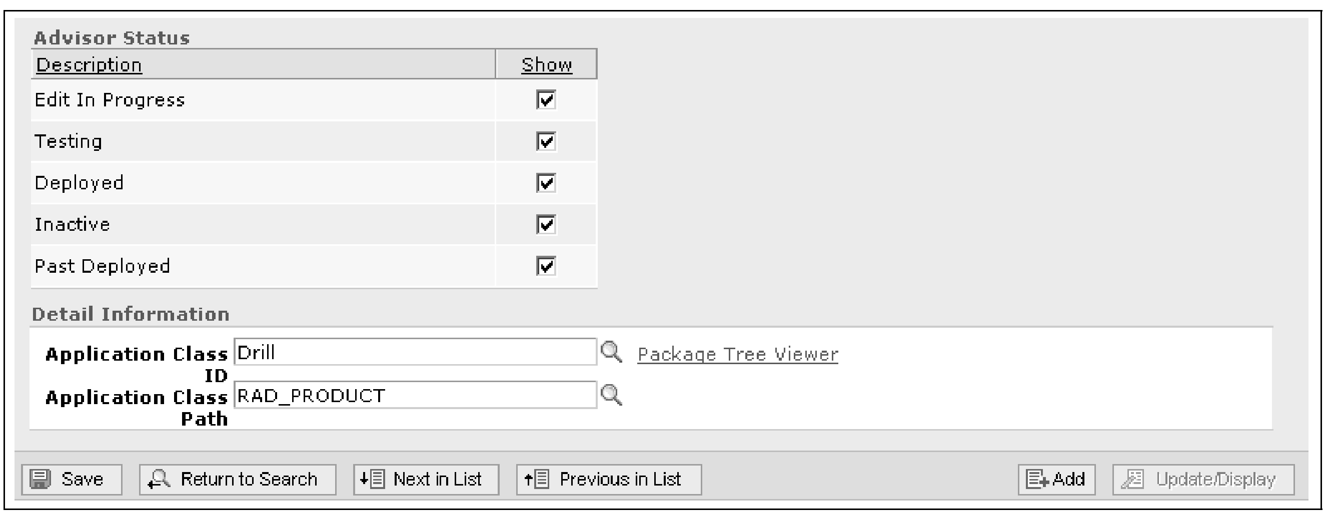
- *Weighting Model:* Create the recommendation model that targets specific customers more precisely with recommendations.

Defining Type

Access the Define Type page.



Define Type page (1 of 2)



Define Type page (2 of 2)

The Define Type page enables you to determine which dialog can be created. You define the recommended object and the steps to use in the dialog. You can use any record in the database as the base recommendation table.

Note. In the data provided, PeopleSoft delivers the *Product Advisor* type to recommend products. However, an implementer can choose to recommend any object in the database.

Type Details

Advisor Type Name Enter the name of the advisor type. This name is available from the drop-down list box in the Advisor Workbench tool. There is a 50-character limit. Advisor type is important because it determines what object a dialog recommends and what kind of dialog you are creating. PeopleSoft delivers an advisor type of *Product Advisor* as system data. This type would be used to recommend products from the PeopleSoft CRM Product Data Model.

Status Select *Active* or *Inactive* for the dialog type.

Description Select a description of *Type* for reference purposes. There is a 254-character limit.

Base Record Enter the record that contains the information for the recommended object. The system accesses this record to return recommendations.

Cache Options

Cache functionality enhances the performance of the PeopleSoft Real-Time Advisor recommendation engine by performing calculations and recommendations only as necessary. After the dialogs are created, the environment creator must perform additional setup from within PeopleSoft Process Scheduler. The steps are outlined in the final section of this chapter.

Dialog Refresh (Minutes) Enter how often the cache refreshes for this dialog type.

Number to Cache Enter the number of objects to be cached for each target group, which by default is *500*. This means that if there are 10 target groups for a dialog, 50,000 objects will be cached. This represents the top 500 for each target group.

Cache Record The PeopleSoft Real-Time Advisor recommendation engine uses this table to store the recommendations. PeopleSoft provides *RAD_PRDCACHE* as the cache record for the *Product Advisor* advisor type that is shipped as system data.

Create the advisor type to recommend objects other than products, by using a base record other than *PROD_ITEM*. You will need to create a new cache record in the database.

It must contain these subrecords:

- Use the subrecord RAD_GENKEY_SBR, provided by PeopleSoft, as is.
- Use a subrecord that contains the keys for the recommended objects.
- Use the existing field RAD_SCORE.

Use the new record in the Cache Record field.

Base Record Key Fields

Field Name Select the unique keys to extract from the base record. These keys uniquely identify the recommendable object.

Sequence Enter the order in which the fields are returned.

Note. The field values are *SETID* and *PRODUCT_ID* for the advisor type, *Product Advisor,* which uses the PROD_ITEM as its base record. These are the keys that identify products in the CRM Product Data Model.

Advisor Steps

Enables you to select the steps that you want to appear and the order in which you want them to appear.

Description Displays an explanation of the different steps in the type.

Sequence Enter the order of the steps in the type.

Step Usage Select *Hidden* when the step does not appear. Select *Shown* when the step appears but is optional. Select *Required* when the step both appears and is required.

Note. Advisor types for dialogs that are only used to collect data must contain these steps (required): *Select Questions, Page Management, Validate Dialog,* and *Test Dialog.*

Advisor types for dialogs that are going to be used to collect data and also provide recommendations should contain these steps: *Select Questions, Page Management, Define Target Groups, Select Characteristics, Weighting Model, Validate Dialog,* and *Test Dialog.* Include the *Select Conditions* step if you want conditions to influence the recommendations or page flow.

Advisor types for dialogs that are going to just recommend without asking questions should contain these steps: *Select Conditions, Define Target Groups, Select Characteristics, Weighting Model, Validate Dialog,* and *Test Dialog.*

Advisor Status

Description Displays statuses that are defined in the status definition and enables the user to select the statuses to use for the advisor type.

Show Select this check box to show the dialog creator which statuses to use in the Advisor Workbench tool.

Note. Include a status of every status type when defining the advisor type. The different statuses are required so the Advisor Workbench tool can accurately determine the state of the dialog.

Detail Information

When an end user drills into a recommendation, PeopleSoft Real-Time Advisor must know the type of information to present to the end user and how to present it. The PeopleSoft PeopleCode that the system launches when the user drills is determined here.

Application Class ID Enter the application class that PeopleSoft Real-Time Advisor launches at runtime when the user requests more information regarding a recommended object. The class ID should be *Drill,* in the advisor type, *Product Advisor.* The advisor type, *Product Advisor,* uses the Product Catalog Details page

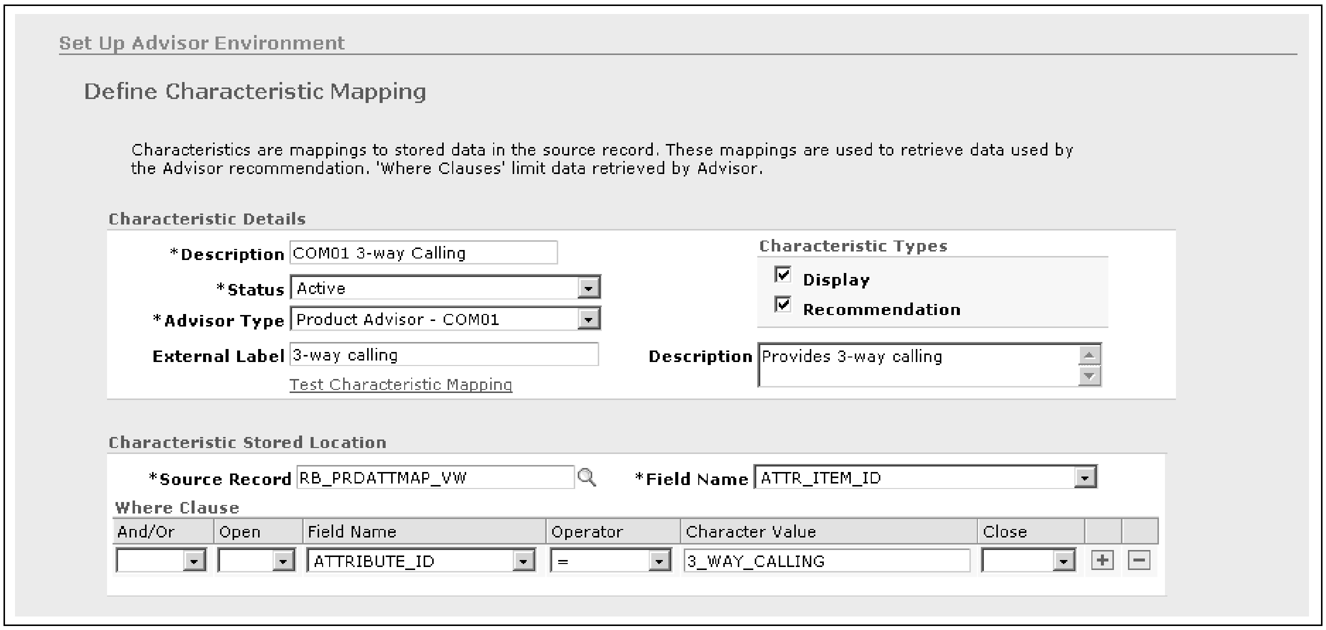
	to display details of the recommended object. If the advisor type is going to recommend objects other than products, use the *RAD_PRODUCT* drill class as an example to create the integration.
Application Class Path	Enter the application package that stores the application class. The class path should be *RAD_PRODUCT* in the advisor type of *Product Advisor.*
Package Tree Viewer	Click this link to find a specific method for a given path and application class.

See Also

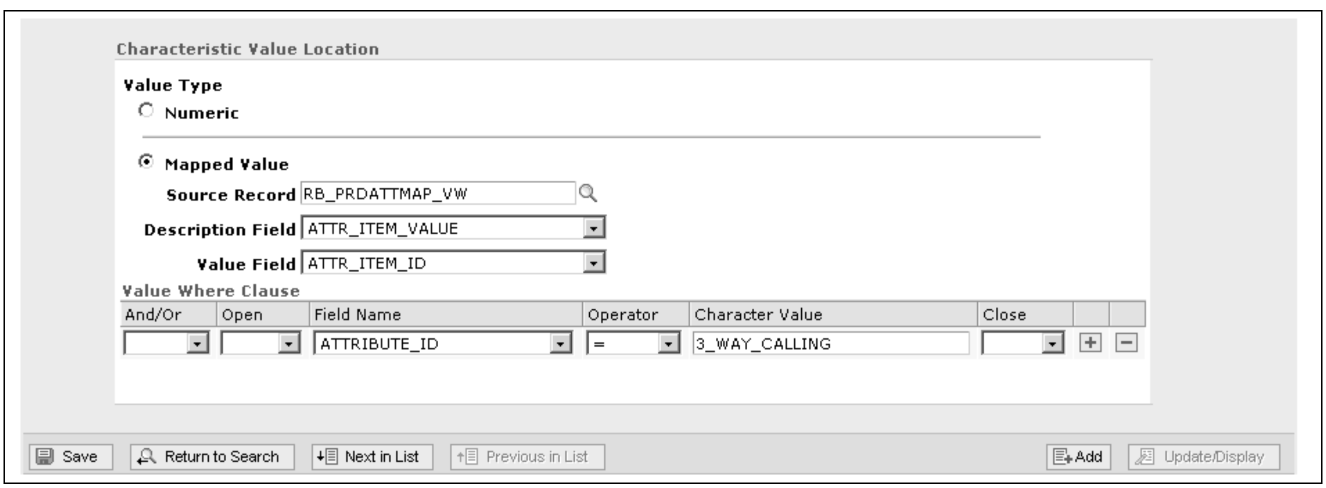
PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Application Classes,” Selecting Application Classes to Use in PeopleSoft CRM

Defining Characteristic Mapping

Access the Define Characteristic Mapping page.



Define Characteristic Mapping page (1 of 2)



Define Characteristic Mapping page (2 of 2)

Characteristics are needed to create dialogs to recommend objects. A characteristic is basically an aspect of the recommended object, like an attribute or a property. Characteristic mapping shields the dialog creator from the technical workings of PeopleSoft Real-Time Advisor and the underlying data model of the recommended objects.

Note. Use characteristic mappings to retrieve information from any PeopleSoft record. This flexibility enables PeopleSoft Real-Time Advisor to expand with the data model.

Characteristic Details

Description Appears to the creator of dialogs in the Advisor Workbench tool. There is a 30-character limit.

Status Select either *Active* or *Inactive.*

Advisor Type This determines the advisor type that is to use this characteristic.

External Label Appears in the PeopleSoft Real-Time Advisor runtime when the recommended object appears to the user in a recommendation.

Test Characteristic Mapping Click this link to test that the mapping is valid. It is a good idea to test mappings to ensure they encompass the desired objects and values. Otherwise, when making a recommendation model, the model will not have access to the desired recommendable objects. Click the Test Characteristic Mapping link to return the objects or values matching the mappings.

Characteristic Types

Describes where the characteristic should be used in the PeopleSoft Real-Time Advisor dialog.

Display Select this check box to associate the characteristic to a display template. It is used at runtime to show information about a given object.

Recommendation Select this check box to use the characteristic in a recommendation model. The dialog creator in Advisor Workbench tool can use the characteristic in a weighting model.

Description Enter a description for the characteristic. There is a 100-character limit.

Characteristic Stored Location

The recommendation engine uses this location to come up with valid objects to recommend based on the Source Record, Field Name, and Where Clause fields.

Source Record Enter the record from which PeopleSoft Real-Time Advisor retrieves valid objects. If you are using the PeopleSoft CRM product data model, you may want to use *PROD_ITEM.*

Field Name Select the field for the characteristic. Fields come from the source record.

Where Clause Select a formatted logic clause to restrict the objects used to recommend products, services, or solutions.

Where clauses enable the use of Boolean logic to limit what the dialog creator can select. Save logic assures that the where clause is properly formatted and values correspond to the field data types. Violations are then identified and appear on the page.

Note. If a table is set-controlled and this restriction is desired, a characteristic must resolve this restriction in the where clause.

Characteristic Value Location

The Advisor Workbench tool uses this information in the recommendation model. Objects that match the value are included in the recommendation object pool and are available to be recommended.

Value Type Select the type of the characteristic, a value type of either Numeric or Mapped Value. With a numeric type, the dialog creator can select a range of allowable numbers. With a mapped answer type, a list that contains values appears.

Source Record Contains valid answers for the Stored Record field.

Description Field Select the valid field that stores values for the dialog creator to view (as opposed to what you enter in the *Value Field*, which is used in the actual evaluation of the recommendation). The dialog creator views this information as a list.

Value Field This information is stored and used for the recommendation. Unlike the Description Field, the dialog creator cannot view values in this field. It is used in the actual evaluation of the recommendation when comparing the characteristic value against the recommendable objects.

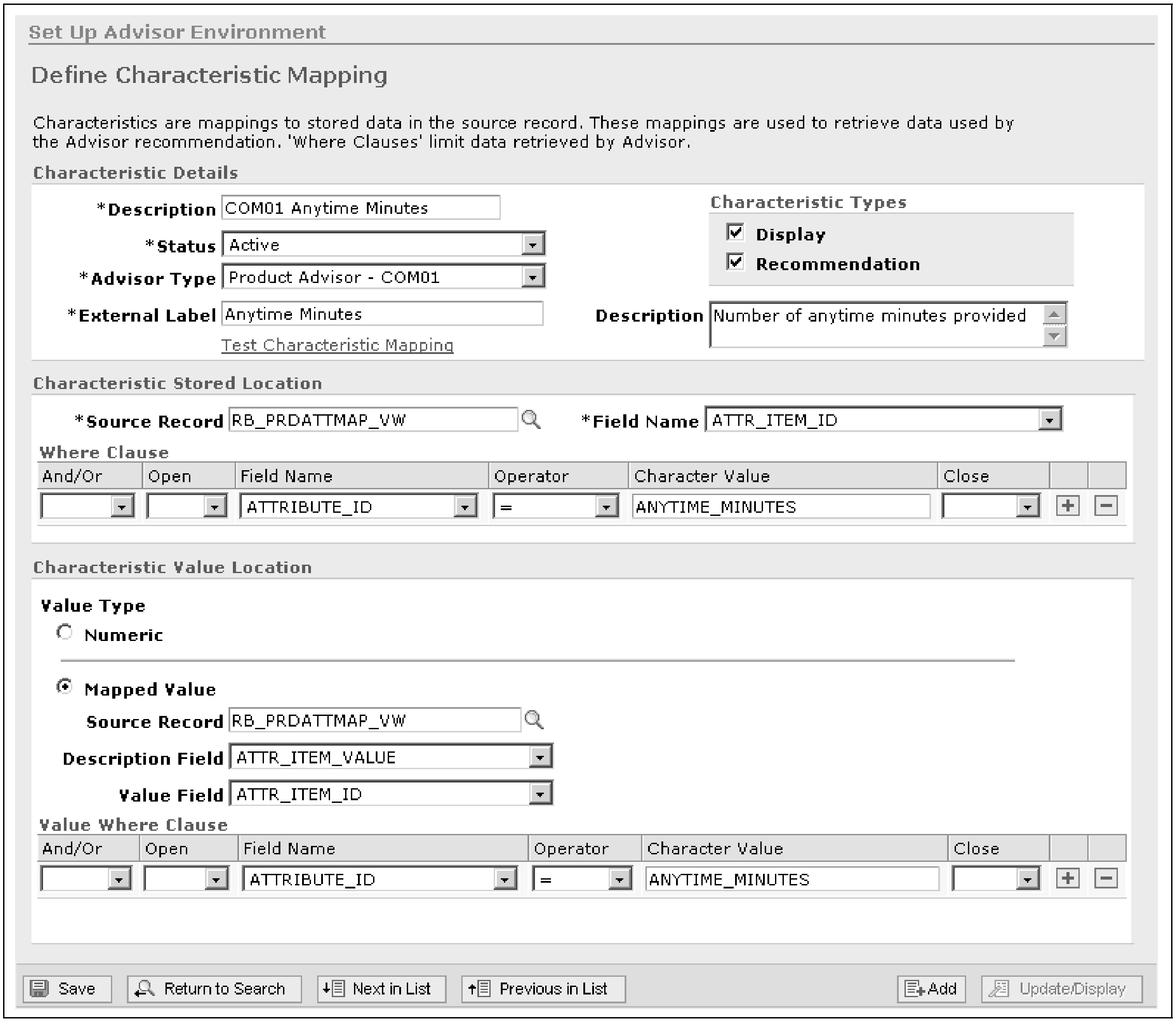
Note. In most cases, the Value Field is exactly the same as the Description Field.

Value Where Clause Define a formatted logic clause to limit the answers that appear to the dialog creator. Where clauses enable the use of Boolean logic to limit what the dialog creator can select. Save logic assures that the where clause is properly formatted and that values correspond to the field data types. Violations are then identified and appear on the page.

Note. If a table is set-controlled and this restriction is desired, a characteristic must resolve this restriction in the where clause.

Example: Mapping Attributes

This is an example Characteristic Mapping to create a recommendation characteristic that uses product attributes.



Define Characteristic Mapping page (Example: Mapping Attributes)

Note. Create a SQL view in Enterprise PeopleTools Application Designer before using attributes in characteristics. These views have already been created for products in the CRM Product Data Model. Use the *PROD_ATTR_D_VW* view to map product attributes that do not have predefined answers, (such as numeric or character) and use the *RB_PRDATTMAP_VW* view to map product attributes that do have predefined or mapped answers. Either these views or the views that you’ve created can access the attribute base records and the record that contains the attributes attached to the recommended object.

To create mapping for mapped attributes:

1. Enter *RB_PRDATTMAP_VW* as the source record in the Characteristic Stored Location group box.
2. Select *ATTR_ITEM_ID* as the field name.
3. Select *ATTRIBUTE_ID* as the field name in the Where Clause group box.
4. Select = as the operator.
5. Enter the name of the attribute ID in the Character Value field.

6. Select Mapped Value in the Characteristic Value Location group box.
7. Enter *RB_PRDATTMAP_VW* as the source record.
8. Select *ATTR_ITEM_Value* as the value in the Description Field.
9. Select *ATTR_ITEM_ID* as the value in the Value Field.
10. Select *ATTRIBUTE_ID* as the field name in the Where Clause group box.
11. Select = as the operator.
12. Enter the name of the attribute ID in the Character Value field.

To create mapping for non-mapped attributes:

1. Enter *PROD_ATTR_D_VW* as the source record in the Characteristic Stored Location group box.
2. Select the appropriate field name for the attribute type that you are mapping.

   Values are:

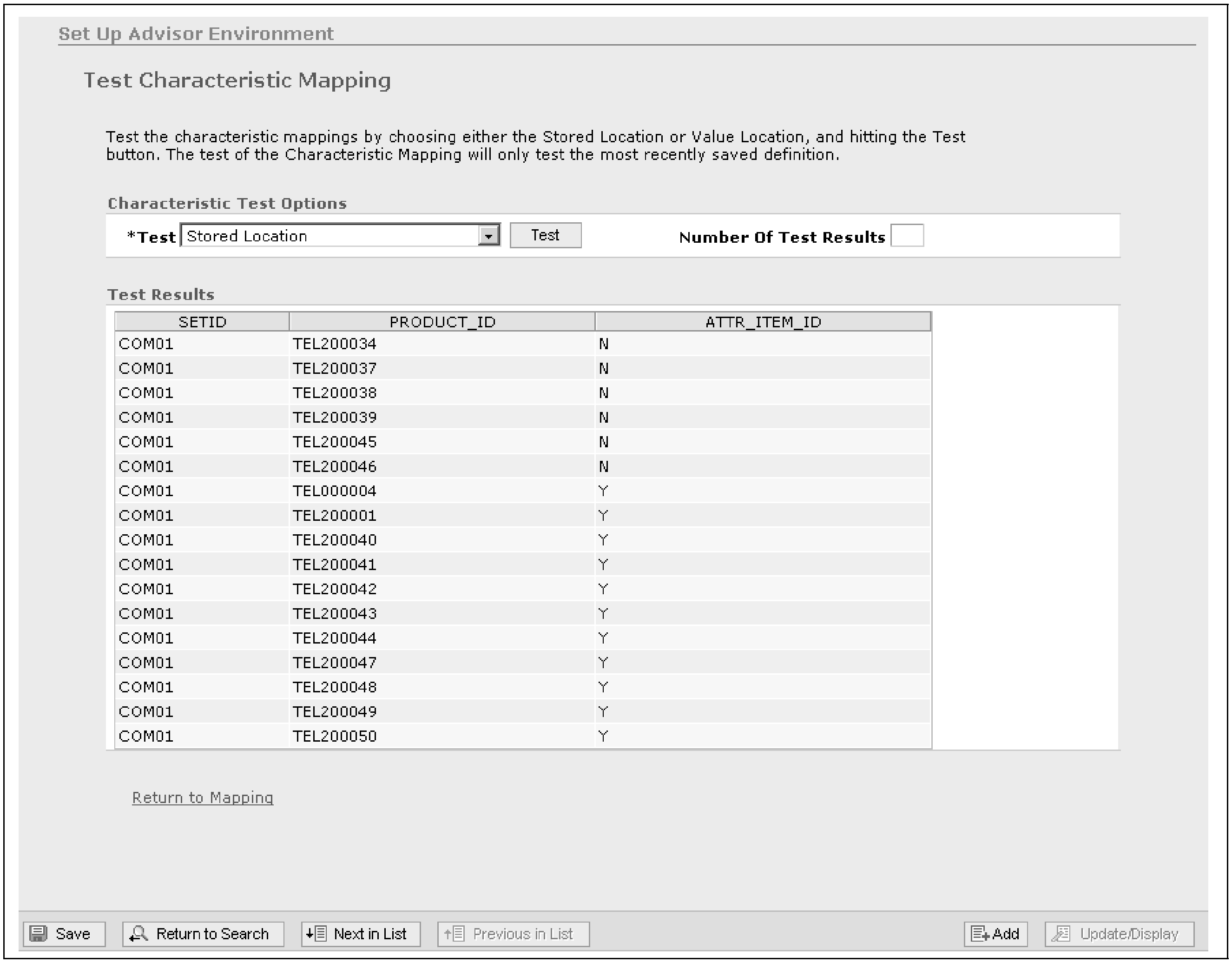
   - If the attribute type is *Numeric*, select *ATTR_NUMBER*.
   - If the attribute type is *Numeric*, select *ATTR_NUMBER*.
   - If the attribute type is *Character*, select *ATTRIBUTE_VALUE*.
   - If the attribute type is *Date*, select *ATTR_DATE*.
3. Select *ATTRIBUTE_ID* as the field name in the Where Clause group box.
4. Select = as the operator.
5. Enter the name of the attribute ID in the Character Value field.
6. Select Mapped Value for date and character attributes in the Characteristic Value Location group box.

   Select Numeric for numeric attributes.

   Note. If you select Numeric here, then mapping is complete. Otherwise, continue with these final steps.
7. Enter *PROD_ATTR_D_VW* as the source record.
8. Matching the previous selection, select either *ATTR_NUMBER*, *ATTRIBUTE_VALUE*, or *ATTR_DATE* as the Description Field and as the Value Field.
9. Select *ATTRIBUTE_ID* as the field name in the Where Clause group box.
10. Select = as the operator.
11. Select the name of the attribute ID in the Character Value field.

Testing Characteristic Mapping

Access the Test Characteristic Mapping page.



Set Up Advisor Environment

Test Characteristic Mapping

Test the characteristic mappings by choosing either the Stored Location or Value Location, and hitting the Test button. The test of the Characteristic Mapping will only test the most recently saved definition.

Characteristic Test Options

*Test Stored Location Test Number Of Test Results

Test Results

SETID	PRODUCT_ID	ATTR_ITEM_ID
COM01	TEL200034	N
COM01	TEL200037	N
COM01	TEL200038	N
COM01	TEL200039	N
COM01	TEL200045	N
COM01	TEL200046	N
COM01	TEL000004	Y
COM01	TEL200001	Y
COM01	TEL200040	Y
COM01	TEL200041	Y
COM01	TEL200042	Y
COM01	TEL200043	Y
COM01	TEL200044	Y
COM01	TEL200047	Y
COM01	TEL200048	Y
COM01	TEL200049	Y
COM01	TEL200050	Y

Return to Mapping

Save Return to Search Next in List Previous in List Add Update/Display

Test Characteristic Mapping page

Select either *Stored Location* or *Value Location*, and click the Test button to test the characteristic mappings. The test of the characteristic mapping only tests the most recently saved definition.

Characteristic Test Options

***Test**	Select either *Stored Location* or *Value Location.* Selecting the Stored Location option will return the objects that match the mapping defined in the characteristic stored location. Selecting the Value Location option will return the values that match the mapping defined in the characteristic value location.
Test	Click this button to test the characteristic mapping.
Number Of Test Results	Limits the number of test results returned.

Note. If the characteristic is marked as having a value type of numeric, no values will be returned if the Value Location option is selected in the Test field.

Enabling a Daemon Group in PeopleSoft Process Scheduler

This section provides an overview of the daemon, and discusses how to:

- Define a daemon group in PeopleSoft Process Scheduler.
- Activate the daemon group on the application server.
- Run PeopleSoft Process Scheduler.

Understanding the Daemon

The PeopleSoft Real-Time Advisor recommendation engine uses a cache to precompute recommendations for deployed dialogs. The cache ensures dialogs are run as efficiently as possible for the end user. Dialogs that have yet to be deployed take longer to run, because the recommendation engine uses a series of searches to find the objects to recommend as opposed to reading directly from a cache. Deployed dialogs *only* look in the cache for recommendations. Therefore, if the dialog versions are deployed, you *must* run the daemon to ensure recommendations are available and refreshed.

The daemon enables the recommendation engine to fill and refresh its cache, as determined by the configuration settings and the advisor type. When deciding the configuration settings for the daemon, you must understand the dynamics of the recommended object set. In a deployed environment, the cache needs to be refreshed as the object set changes. For example, suppose that you recommend products from a catalog and you have products that are no longer in the catalog, you don't want the recommendation engine to recommend against those products. If you have a highly dynamic set of recommended objects, you must refresh the cache frequently to ensure efficient operation of the engine. If the set of objects is fairly static, the cache refresh does not need to be as frequent.

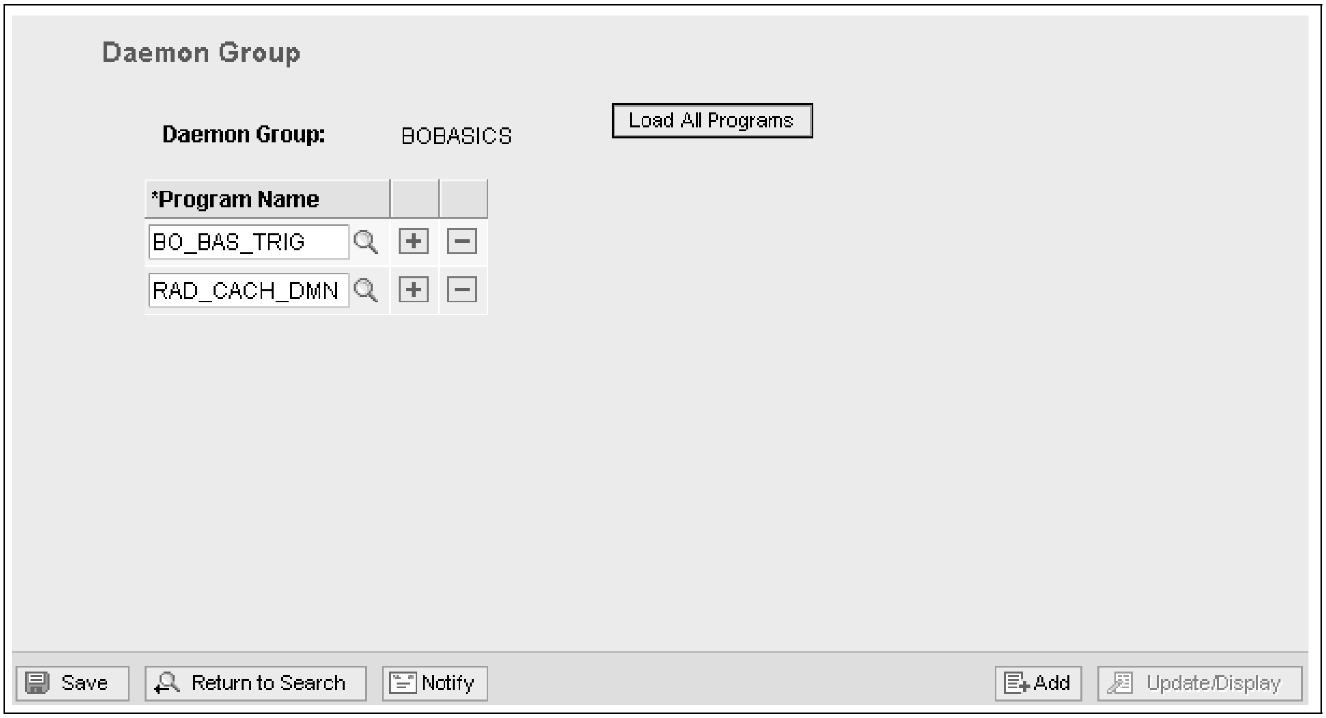
Note. The daemon and process scheduler does not need to be activated for Real-Time Advisor until there are deployed dialogs.

Pages Used to Enable a Daemon Group in PeopleSoft Process Scheduler

Page Name	Object Name	Navigation	Usage
Daemon Group	DAEMONGROUP	PeopleTools, Process Scheduler, Daemon Group	Define a daemon group in PeopleSoft Process Scheduler.
Server Daemon Details	SERVERDAEMON	PeopleTools, Process Scheduler, Servers, Daemon Definition	Activate the daemon group on the application server. **Note.** PeopleSoft Process Scheduler may be running on multiple servers. Select a server from the Servers search page and access the Daemon page for the selected server.

Defining a Daemon Group in PeopleSoft Process Scheduler

Access the Daemon Group page.



Daemon Group page

Daemon Group

Displays the *BOBASICS* daemon group, which is the default selection. You will not see the PeopleSoft Real-Time Advisor selection in this list until you add a row and a lookup program name. Select *RAD_CACHE_DMN* as the program name.

Note. Click Load All Programs to retrieve the RAD_CACHE_DMN group.

Load All Programs

Click to load the remaining daemon programs, which will include the daemon `RAD_CACHE_DMN.`

Note. Click Lookup Program Name to retrieve the RAD_CACHE_DMN group.

Program Name

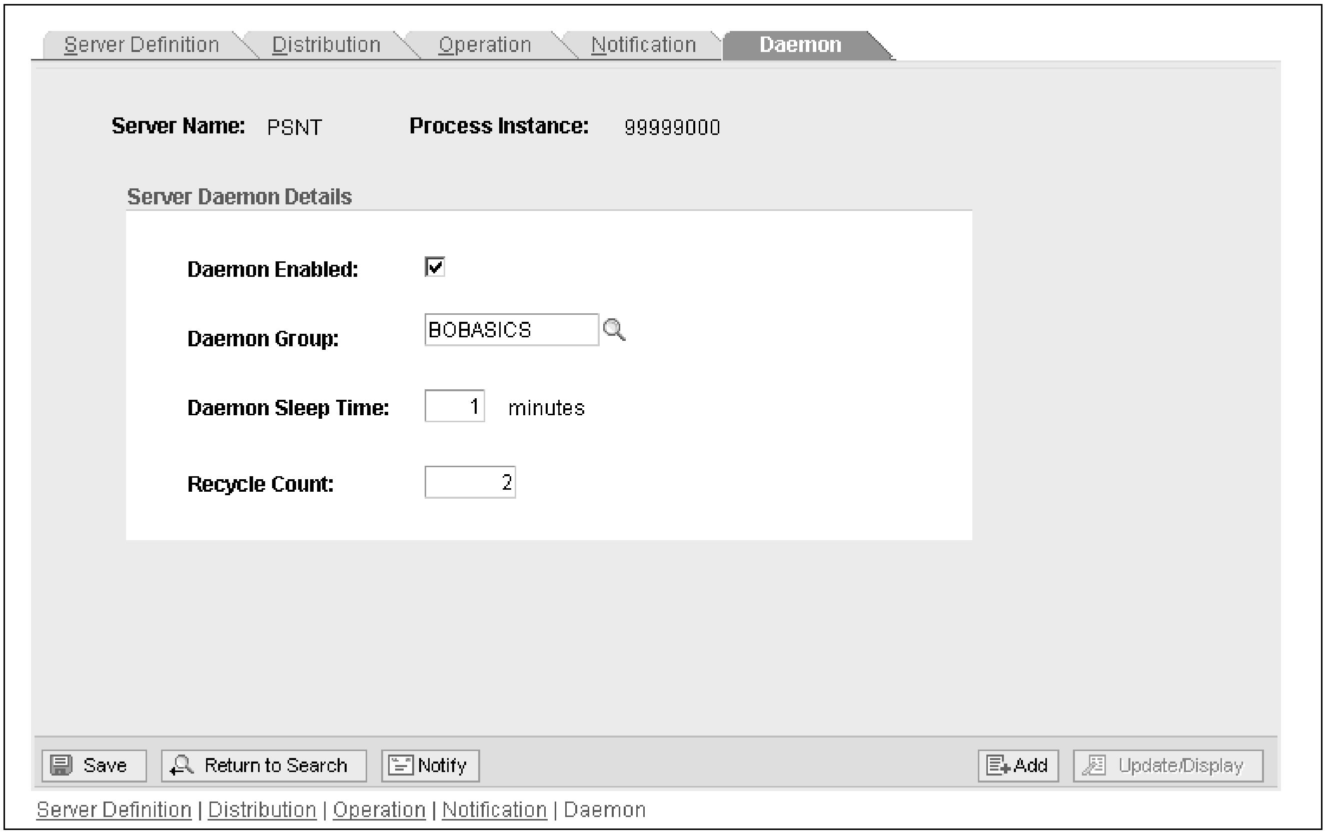
Enter the name of the daemon program. In this case, look for the `RAD_CACHE_DMN` daemon group, which is packaged with PeopleSoft Real-Time Advisor but is not selected. Click the Lookup button to verify that the description is *Cache Computing AE Daemon.*

See Also

Chapter 3, "Preparing the PeopleSoft Real-Time Advisor Environment," Defining a Daemon Group in PeopleSoft Process Scheduler, page 24

Activating the Daemon Group on the Application Server

Access the Server Daemon Details page.



Server Daemon Details page

Daemon Enabled

Select this check box. A daemon process is an application engine process that runs continuously when PeopleSoft Process Scheduler is operational. It triggers other application engine processes based on the entered daemon group.

Daemon Group

Ensure that *BOBASICS* appears as the default value. *BOBASICS* now includes the daemon group because of the previous step.

Daemon Sleep Time

Enter a sleep time to control the activity of the process. The daemon is a process that runs in the background, but it should not run continuously. A sleep time is the number of minutes for which the daemon process sleeps or waits before it checks for work. When it wakes, it checks for processes that have been and need to be run on this process server.

Note. The sleep time should be less than any dialog refresh (minutes) as defined in the advisor types.

Recycle Count

A cycle is the sequence of sleeping and working. The system automatically counts the number of times that it sleeps and works. When it reaches the recycle count value, the daemon process reboots itself.

Note. For processing errors and cache computation exceptions, check the PeopleSoft Real-Time Advisor log tables.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Running PeopleSoft Process Scheduler

Create and start a process scheduler server.

You *must* create and start a process schedule to finish enabling the daemon. Running PeopleSoft Process Scheduler activates the daemon, which periodically updates the PeopleSoft Real-Time Advisor cache.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

CHAPTER 4

Setting Up PeopleSoft Real-Time Advisor Dialogs

This chapter provides an overview of dialog creation and discusses how to:

- Build dialog elements.
- Create dialogs using the Advisor Workbench tool.
- Maintain dialog versions.

Understanding Dialog Creation

PeopleSoft Real-Time Advisor consists of dialogs designed to collect information about a user and direct that user to recommendations. These recommendations are determined by the PeopleSoft Real-Time Advisor recommendation engine, which uses mathematical formulae to aggregate and weight responses to return a recommendation. The dialog creator is typically a person who is an expert in both the objects being recommended and the targeted audience.

An Advisor dialog can be triggered through the AAF (active analytics framework) and can run in interactive or quiet mode. Interactive mode returns a ranked recommendation list that matches items to user needs based on questions and answers. Quiet mode enables recommendations to occur without the user answering questions and instead through the use of other data stored in the system from Support, the AAF, and Marketing.

A dialog can also be executed directly from calling applications without the need for the AAF.

Before you can begin the process of dialog creation, you must make sure that an administrator has prepared the Real-Time Advisor environment. After the environment is ready, you can create the dialog elements (like questions and explanations) and finally, you use the Advisor Workbench tool to create the dialogs themselves. Within the Advisor Workbench tool, you can modify, save, test, and validate dialogs.

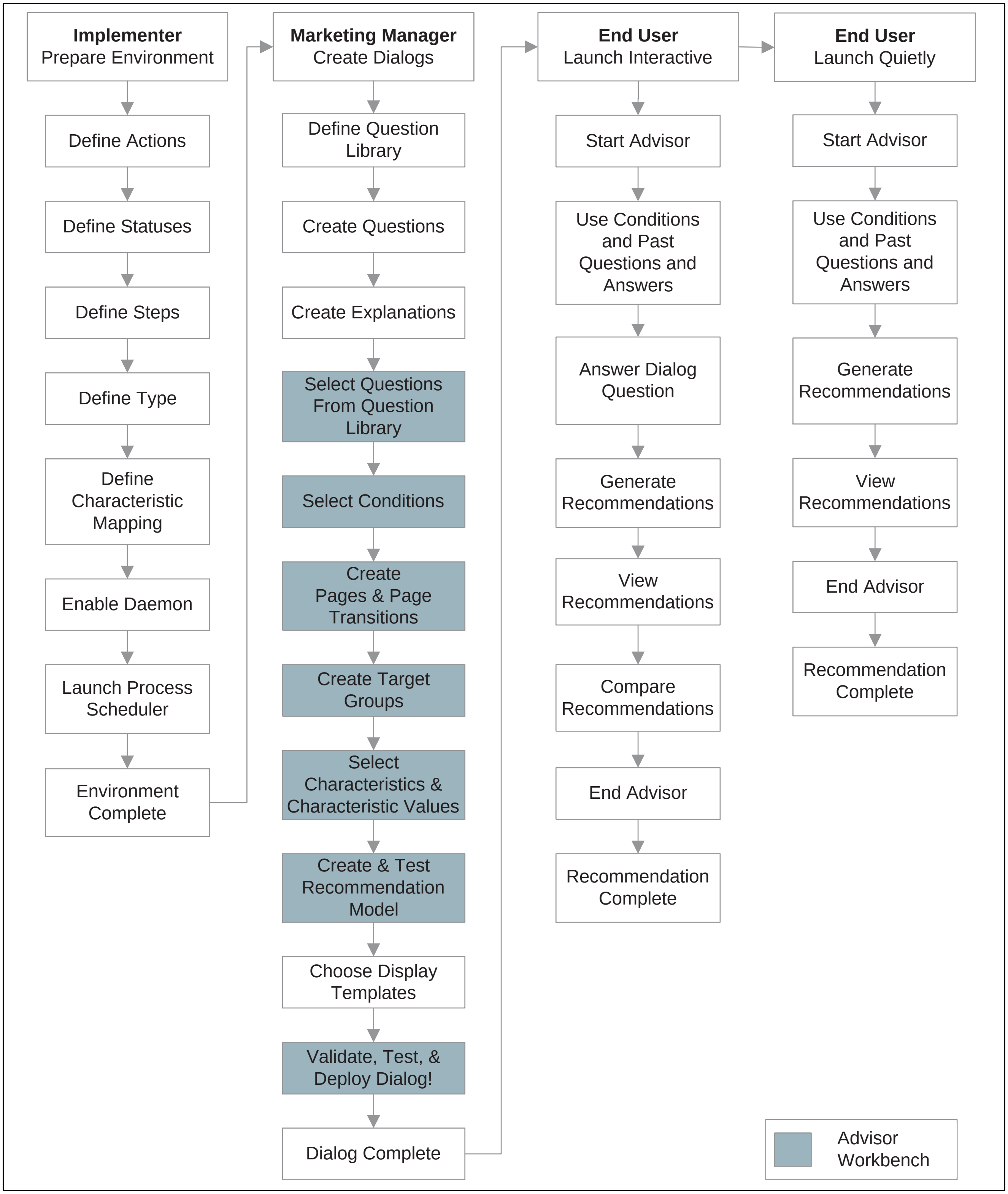
After creating and testing the dialog, you create the display templates that control the look and feel of the dialog, and then you deploy the dialog. Only deployed dialogs are available to use by calling applications.

Advisor dialogs are essentially a combination of two things:

- Pages and questions designed to acquire information from the user.
- A recommendation model that determines recommendations based on user answers and known information that are applied against a weighting model, or other data from support, analytics, and marketing.

Note. PeopleSoft CRM delivers system data with environment information that can be used by the dialog creator. For example, the delivered *Product Advisor* advisor type maps to the PeopleSoft CRM product data model, and characteristic mappings map to various records, which constitute the PeopleSoft CRM product data model.

The following process flow illustrates the PeopleSoft Enterprise Real-Time Advisor business process according to role:



Business Process Flow for Real-Time Advisor According to Role

See Also

Chapter 5, “Defining Display Templates,” Using PeopleSoft Real-Time Advisor, page 103

Building Dialog Elements

You must first create dialog elements before you use the Advisor Workbench tool to create the dialogs themselves. These elements include question libraries, questions, and explanations. This section discusses how to:

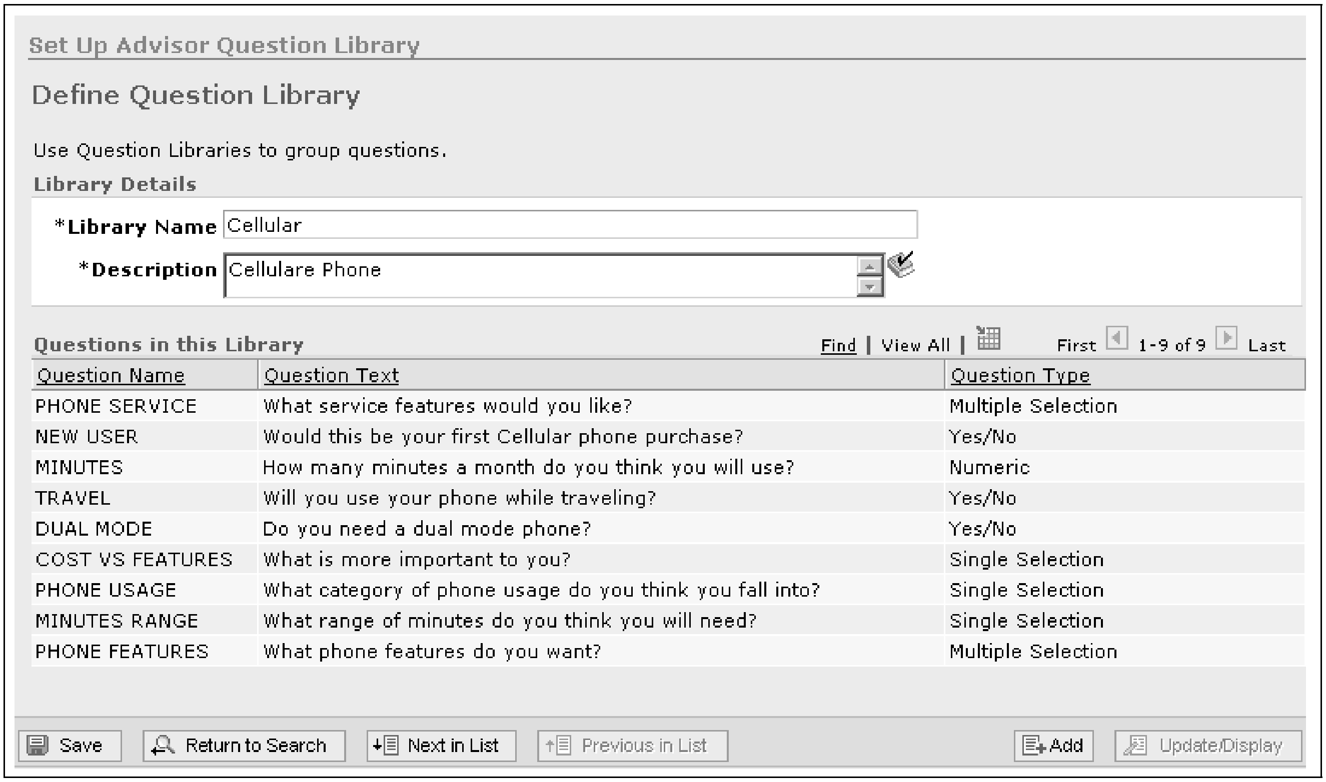
- Define question libraries.
- Define questions.
- View question usage.
- Define explanations.
- View explanation usage.
- Merge terms.

Pages Used to Build Dialog Elements

Page Name	Object Name	Navigation	Usage
Define Question Library	RAD_QA_LIBRARY	Marketing, Advisor Dialogs, Define Question Library	Create a folder of related questions for reference purposes. Generally, questions in each library have a common theme.
Define Question	RAD_QUESTION	Marketing, Advisor Dialogs, Define Question	Create questions and associate them with an existing question library.
View Question Usage	RAD_QA_LOOKUP	Open a question on the Define Question page and then click the View Question Usage link.	View where a question is used. Use this page to determine which dialogs are affected by modifications to a question. Changes made to a question are reflected in all dialogs that reference the question.
Define Explanation	RAD_EXPLANATION	Marketing, Advisor Dialogs, Define Explanation	Create text explanations to attach to either dialogs or questions. You can also attach URL explanations that can be used with questions.
View Explanation Usage	RAD_EXPLAN_LKUP	Open an explanation on the Define Explanation page and then click the View Explanation Usage link.	View the usages of explanations. You will want to know which dialogs, if any, are impacted by modifications to an explanation. Changes made to explanations will be reflected in all dialogs that reference the explanation.
Merge Terms	RAD_TOKEN	Click the Merge Terms button on the Define Explanation page or Define Question page.	Select available terms from a tree, to automatically fill in the code for the term for each of the different brackets that have been left blank in the question body. Terms represent available information in the system.

Defining Question Libraries

Access the Define Question Library page.



Define Question Library page

The Question Library page shows the details of the question library. Question libraries group related questions. You do not add questions to a library on this page. To add questions to a library, edit the question on the Define Question page and specify a library in the Library field.

Questions in This Library

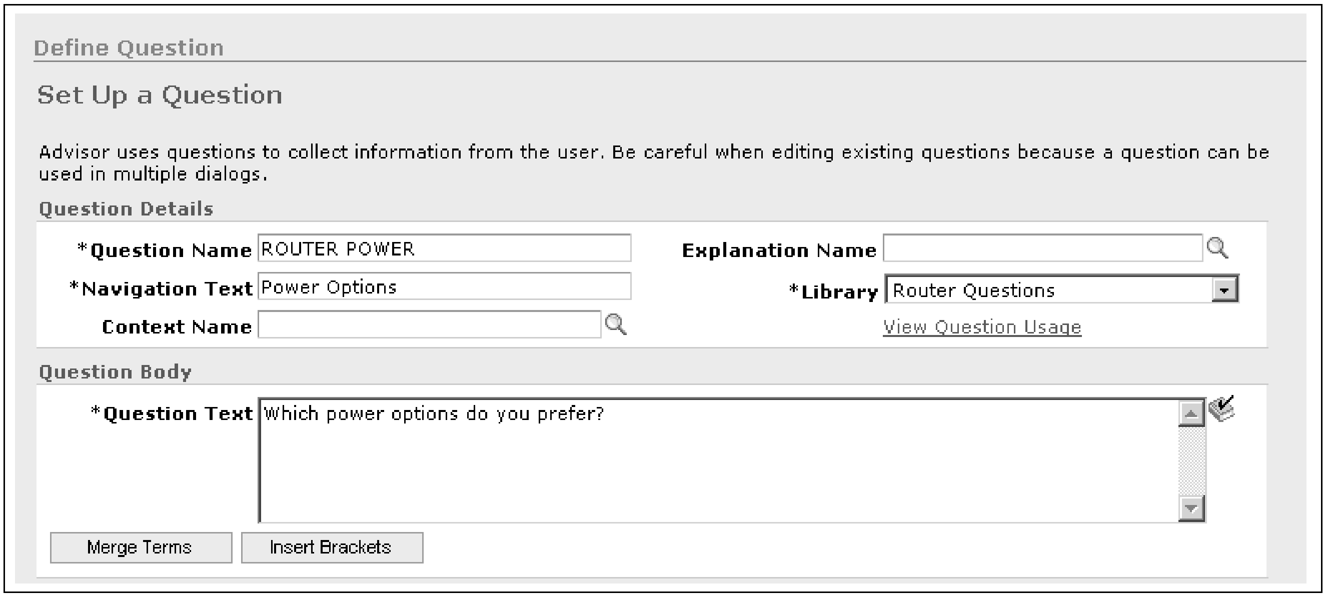
This section only contains information if you have questions associated to this library. It displays all questions currently associated to this library.

Note. When you create a new library, no questions appear, but they can be created and associated to the newly created library from the Define Questions component.

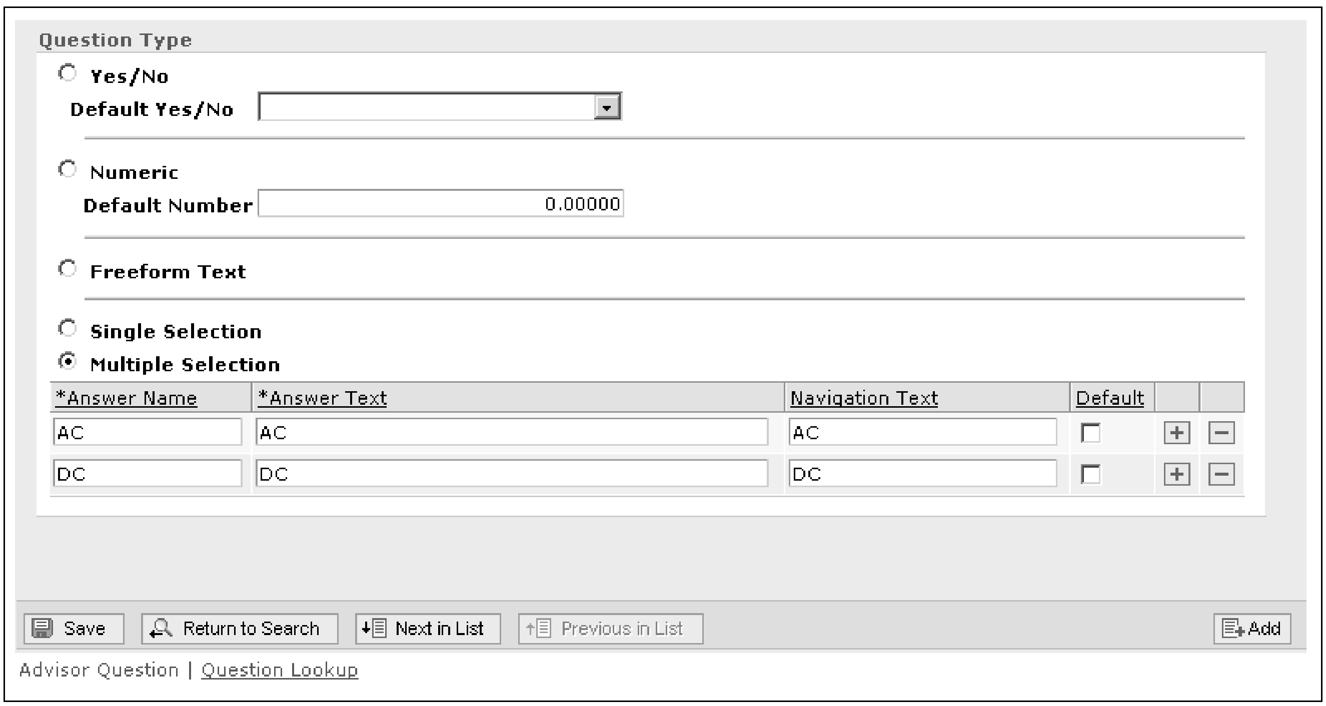
Question Type Displays either *Single Selection, Multiple Selection, Numeric, Yes/No,* or *Freeform Text.*

Defining Questions

Access the Define Question page.



Define Question page (1 of 2)



Define Question page (2 of 2)

Use this page to create questions that become part of the pages, and ultimately the dialog. Group questions into libraries for easy retrieval. You must have an existing question library to which you can associate a new question.

Question Details

Explanation Name Associate the question with an explanation. At runtime, the question is marked to indicate that an explanation is available for the question. Explanations are retrieved from a common repository where all explanations are stored, including the ones used for pages. The dialog creator can create a new explanation if no suitable explanations exist.

See Chapter 4, "Setting Up PeopleSoft Real-Time Advisor Dialogs," Defining Explanations, page 37.

Navigation Text
Enter a short description. This text is used in the path guide, which is displayed to the user. There is a 75-character limit.

Library
Select a question library to store the question. You can move a question from one question library to another by changing this value.

Context Name
Select the context to apply. The context is used by the AAF to resolve terms and conditions, and specifies what information is needed to do the resolution. The context in this circumstance is usually the calling application that will be using the dialog where the question will be used.

View Question Usage
Click to see which dialogs currently use this question. Use this link when modifying questions to ensure that you don't modify existing dialogs inappropriately. Changes to questions referenced by dialogs are reflected immediately.

Question Body

Question Text
Enter the question text that the user sees. There is a 245-character limit.

Note. In order to merge terms into a question text, enter an open bracket and a close bracket in the location in the text where a term will be placed. If the term is already known, the user can enter it into the text enclosed in brackets, and when the Merge Terms button is clicked, the application will automatically verify that the entered term exists for the current context. If it does exist the term will be merged; if the text entered is not a valid term, it be cleared and treated as if empty brackets were entered in that place in the question text.

Merge Terms
Click to access the Merge Terms page and select available terms to automatically fill in the code for the term for each of the different brackets that have been left blank in the question body.

Note. The user must click the Merge Terms button in order to embed any terms entered in the question text. Otherwise, any bracketed text will be treated as regular text and not an embedded term.

Insert Brackets
Click to insert brackets in the question text where you want to insert a term. The empty terms will always be inserted at the end of the current text.

Question Type

The question type dictates what the question looks like at runtime. If a question is of type *Single Selection* or *Multiple Selection,* then you need to define valid answers for the question. Answer definitions contain three elements: answer name, answer text, and navigation text.

Yes/No
Select this to define a question with answers of yes or no.

Default Yes/No
At runtime, the user sees a drop-down list box to select either *Yes* or *No.* Enter a default value to appear at runtime.

Numeric
Select to define a question with a numeric answer and prompt the user to enter a numeric value in an edit box at runtime.

Default Number Enter a default numeric value to appear at runtime.

Freeform Text Select to enable the user to enter freeform text. The text is stored by the dialog at completion or when saved. Freeform text questions collect information from the end user. Freeform answers cannot be used in transition definitions and target group definitions.

Single Selection Select to present the user with a radio button that lists the answers under the question. The user can only choose one answer from the list.

Multiple Selection Select to present the user with a grid of answers with check boxes adjacent to each answer. The user can choose any combination of answers by selecting the appropriate check boxes.

Answer Name Enter the name of the answer. The name is displayed in the Advisor Workbench tool. The answer name is used in weighting and transition logic for easy identification, but is not displayed to the user. There is a 50-character limit.

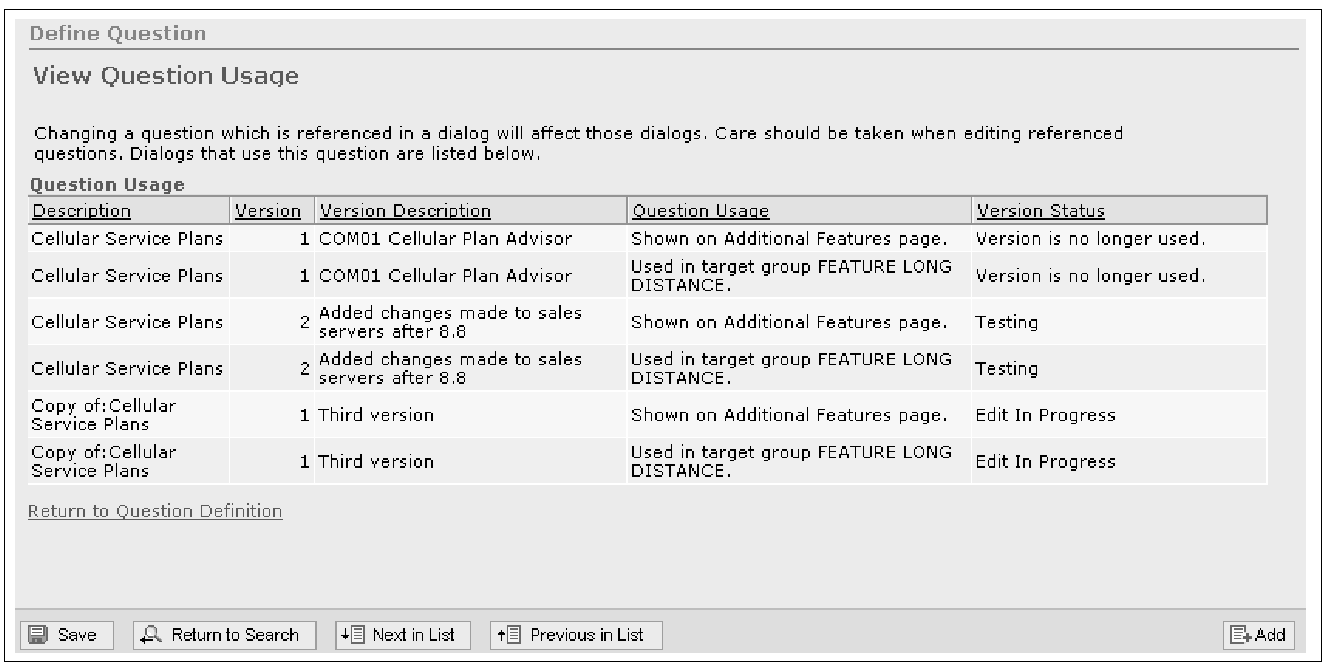
Answer Text Enter answer text to display to the user at runtime. There is a 254-character limit.

Navigation Text Enter a short text description displayed to the user at runtime. Navigation text appears in the path guide. There is a 75-character limit.

Default Select one answer as the default. This answer is preselected when the question first appears to the user.

Viewing Question Usage

Access the View Question Usage page.



View Question Usage page

View the dialogs that use a particular question. It is important when you modify a question to know what dialogs will be impacted by the modification. A change to a question is reflected immediately in all dialogs that use the question.

Question Usage

Description — Displays the name for the dialogs that use the question.

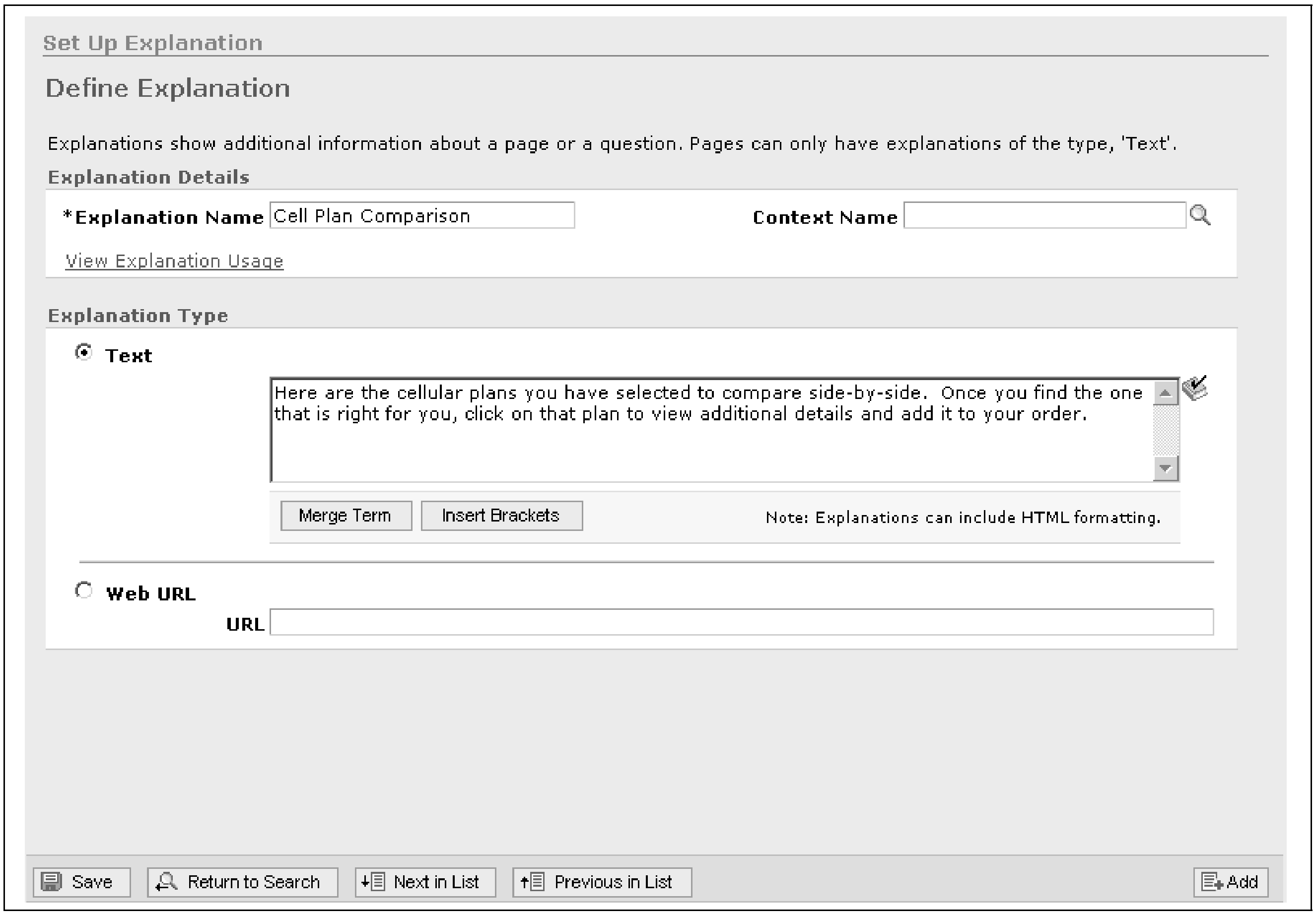
Question Usage — Describes the location of the question in the dialog.

Version Status — Displays the status of the version of the dialog in which the question appears.

See Chapter 3, "Preparing the PeopleSoft Real-Time Advisor Environment," Defining Statuses, page 12.

Defining Explanations

Access the Define Explanation page.



Define Explanation page

Explanations provide insight into elements such as pages and questions, as well as offering more information and context. Explanations come in two types, *Text* and *URL*.

Explanation Details

Context Name — Select the context to apply. The context is used by the AAF to resolve terms and conditions, and to specify the information that is needed for the resolution. The context in this circumstance is usually the calling application that will be using the dialog which includes the explanation.

View Explanation Usage Click to view which dialogs use the explanation. Changes made to explanations are reflected in all dialogs that reference the explanation.

Explanation Type

Text Select to store the explanation in the database as text and show it to the user either at the top of a page or when the user drills into a question for explanation. This text can be plain text or can include HTML formatting.

Note. In order to merge terms into an explanation text, enter an open bracket and a close bracket in the location in the text where a term will be placed. If the term is already known, the user can enter it into the text enclosed in brackets. When the user clicks the Merge Terms button, the application will automatically verify that the entered term exists for the current context. If it does exist the term will be merged; if the text entered is not a valid term, it be cleared and treated as if empty brackets were entered in that place in the explanation text.

Merge Terms Click to access the Merge Terms page and select available terms, to automatically fill in the code for the term for each of the different brackets that have been left blank in the explanation body.

Note. The user must click the Merge Terms button in order to embed any terms entered in the explanation text. Otherwise, any bracketed text will be treated as regular text and not an embedded term.

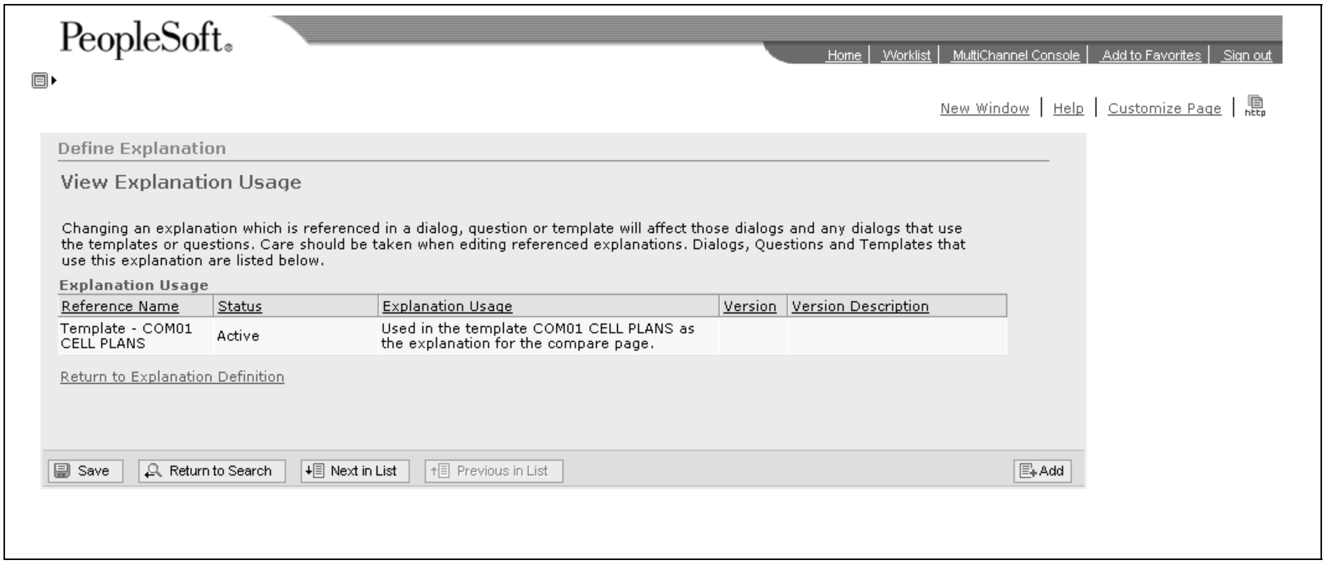
Insert Brackets Click to insert brackets any place in the question text where you want to insert a term. The empty terms will always be inserted at the end of the current text.

Edit Text Click to edit the explanation text.

web URL To use a web-based explanation instead of text, provide a URL address in the URL field. There is a 254-character limit. URL explanations can be used for questions only, and not for pages or templates. The contents of the URL appear in a pop-up window if a user drills into a question for more information.

Viewing Explanation Usage

Access the View Explanation Usage page.



View Explanation Usage page

View the dialogs, templates and questions that use an explanation. It is important when you modify an explanation to know what will be impacted by the modification. A change to an explanation is reflected immediately in all dialogs, questions and templates that use the explanation.

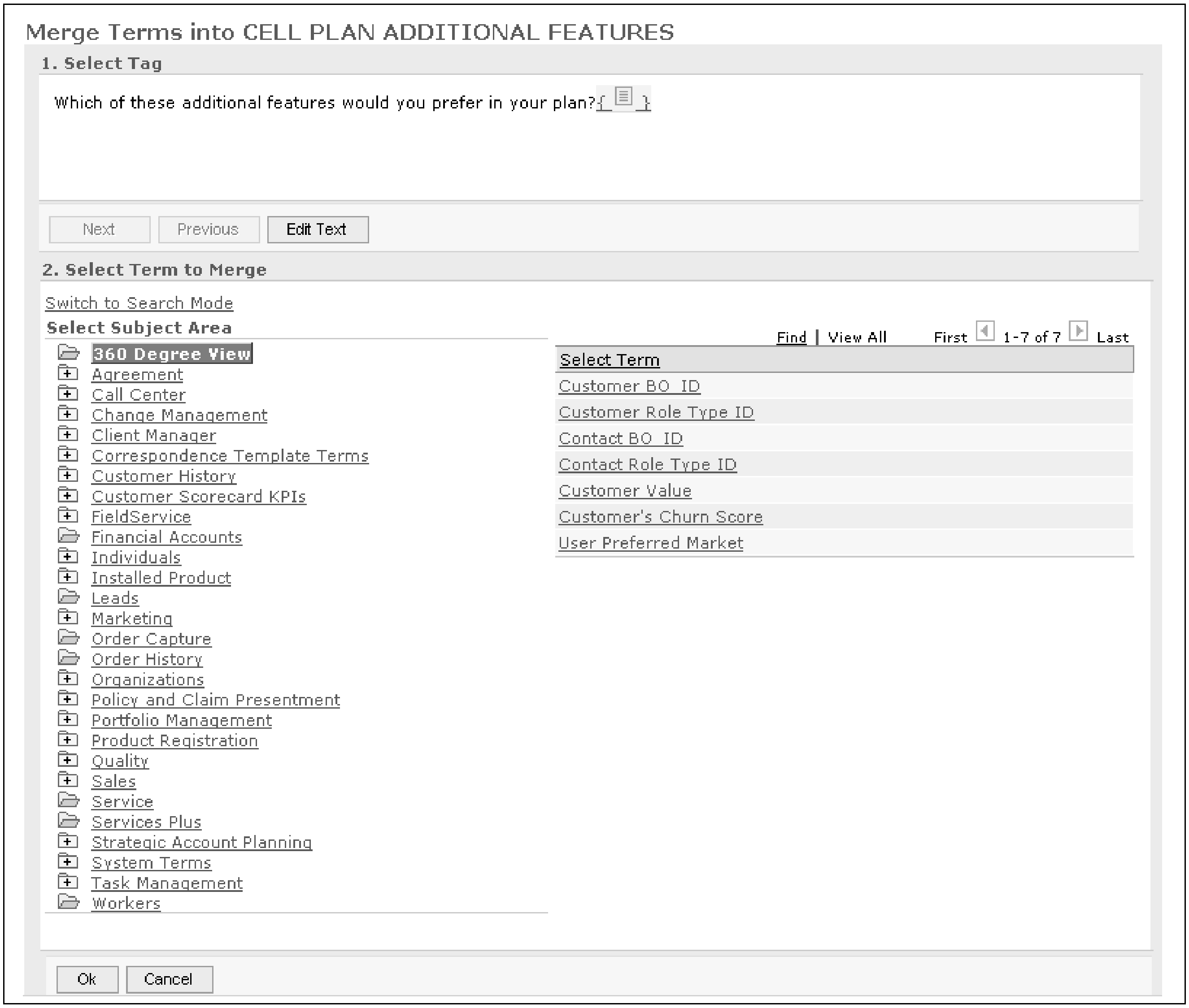
Explanation Usage

Reference Name Displays the name of the dialog, template, or question that uses this explanation.

Status Displays the status of the dialog, question, or template in which the explanation appears.

Merging Terms

Access the Merge Terms page.



Merge Terms page

Terms personalize the text that is going to be shown to the user during the Real-time Advisor runtime. For example, you might want to insert the user’s name into the question text. By using the AAF context during the runtime, the terms can be resolved to the concepts that they represent for the user that is going through the Advisor dialog. The tree will show the available terms for the given context.

Select Tag

Next and **Previous**	Click to move to the next or previous set of brackets.
	Note. The user can also click the actual term or empty brackets to jump directly to a term to insert or update.
Edit Text	Click to edit the text in which terms are being merged and to insert brackets for adding additional terms to the text.

Select Term to Merge

Switch to Search Mode	Click to search for terms.
Select Subject Area	Select terms from the tree to place into the text.

See *PeopleSoft Enterprise Components for CRM 8.9 PeopleBook*

Creating Dialogs Using the Advisor Workbench Tool

This section provides an overview of the Advisor Workbench tool and discusses how to:

- Use the Advisor Workbench tool.
- Select dialog questions.
- Create, edit, or clone questions from a question library.
- Define conditions.
- Select terms to use in conditions.
- Create pages.
- Create page transitions.
- Create target groups.
- View characteristics and select values for those characteristics.
- Create or edit characteristic values.
- Create recommendations models by weighting characteristic values against target groups.
- Test recommendation models.
- Validate dialogs.
- Test dialogs in quiet mode.
- Test dialogs in interactive mode.
- Save dialogs.

Understanding the Advisor Workbench Tool

The dialog setup process is linear; one step must be completed before the next. You can enter basic information such as dialog name, description, and valid effective dates and status. The step-by-step process used by the Advisor Workbench tool walks you through the setup and prevents a dialog from being shown to external users until it is validated and deployed.

Note. Workbench steps depend on the advisor type used by the dialog, as well as how the type was defined. For example, you don't need to define a recommendation model if the type of dialog you are creating is only for collecting user information.

Note. Although you can create questions and select explanations for a dialog in the Advisor Workbench tool, you cannot create explanations in this tool. You can either create explanations first or leave explanations blank and add them later.

See Also

Chapter 3, “Preparing the PeopleSoft Real-Time Advisor Environment,” page 9

Chapter 4, “Setting Up PeopleSoft Real-Time Advisor Dialogs,” Defining Explanations, page 37

Pages Used to Create Dialogs Using the Advisor Workbench Tool

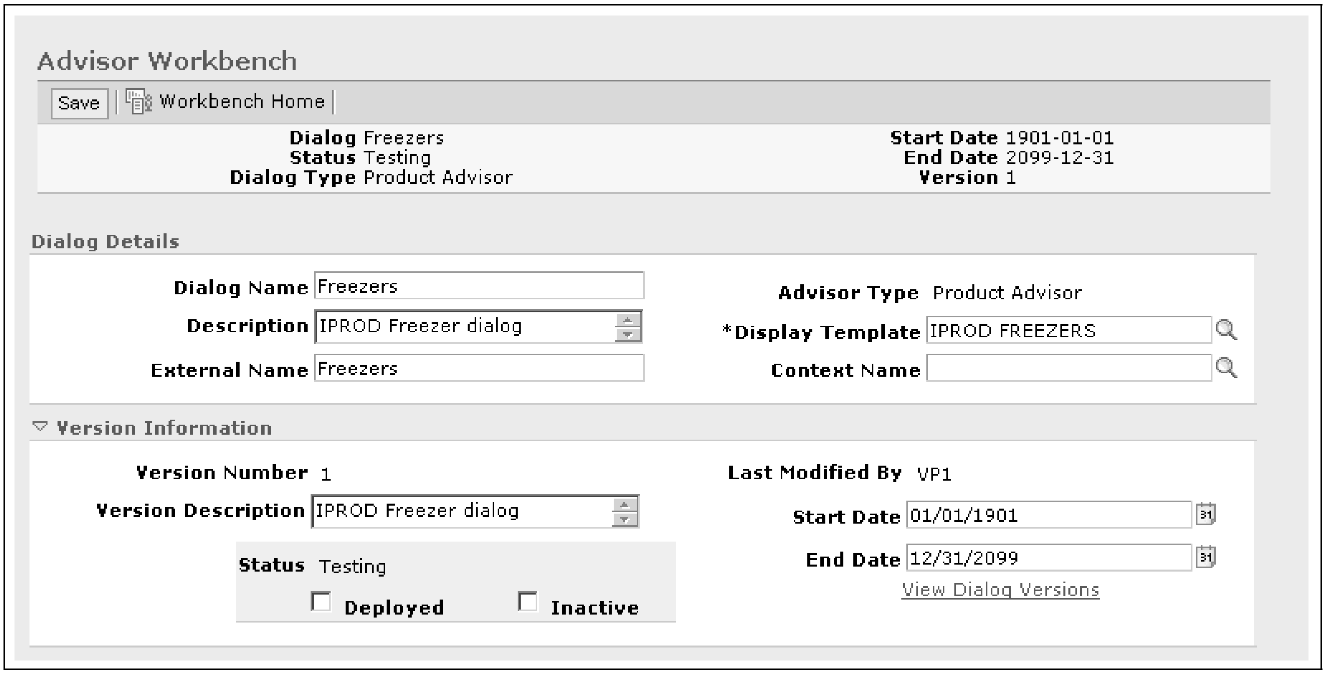
Page Name	Object Name	Navigation	Usage
Advisor Workbench	RAD_ADVISOR	Marketing, Advisor Dialogs, Advisor Workbench	From this page, create the main elements that constitute a dialog.
Select Questions	RAD_ADVISOR_QAS	Click the Select Questions link on the Advisor Workbench page.	Choose the questions to include in a dialog.
Question Library	RAD_ADVISOR_LIB	Click a library name in the Question Libraries group box on the Select Questions page.	Add or remove questions from the dialog. You can also create a new question, edit questions, or clone existing questions.
Edit Questions	RAD_QUESTION	Click the Edit button on the Question Library page.	Edit an existing question.
Define Conditions	RAD_ADVISOR_CND	Click the Select Conditions link on the Advisor Workbench page.	Select external conditions to influence target groups and transitions.
Create a Condition	RAD_CONDITION_SEC	• Click the Condition Name link on the Define Conditions page. • Click the Create Condition button on the Define Conditions page.	Create or edit a condition to bring in external system and user information.
Select Term	RAD_SRCHTRM_SEC	Click the Select Term link on the Define Conditions page.	Select or search for a term for a condition statement.
Layout Pages & Transitions	RAD_ADVISOR_STA	Click the Layout Pages & Transitions link on the Advisor Workbench page.	Define the flow of the dialog by creating pages and transitions between those pages.

Page Name	Object Name	Navigation	Usage
Create a Page	RAD_STATION	• Click the Create a Page button on the Layout Pages and Transitions page. • Click a page name in the Pages & Transitions group box on the Layout Pages and Transitions page.	Add a new page to the dialog or edit an existing page.
Create Page Transitions	RAD_ADVISOR_TRN	Click the Edit Transitions button on the Layout Pages and Transitions page.	Define the transitions that determine the path a user takes through a dialog.
Map Page Transitions	RAD_STATION_MAP	Click the Map Page Transitions button on the Layout Pages and Transitions page.	See a snapshot of current pages, page transitions, and transition conditions in the advisor dialog. This visually demonstrates the pages that can be reached from a given page.
Define Target Groups	RAD_ADVISOR_SEG	Click the Define Target Groups link on the Advisor Workbench page.	Segment an audience based on answers to selected questions. Target groups are used in a dialog to group users and target recommendations.
Create a Target Group	RAD_SEGMENT	• Click the Create a Target Group button on the Define Target Groups page. • Click a target group name in the Target Groups group box on the Define Target Groups page.	Define a new target group by creating question and answer combinations. Click the existing target group name to edit an existing target group. You can rank the relevance of a target group compared to other target groups.
Selected Characteristics	RAD_ADVISOR_CHR	Click the Select Characteristics link on the Advisor Workbench page.	View selected characteristics in the dialog. Objects with these characteristics and values are available for recommendation. Selected characteristics can also be removed from the dialog.
Select Characteristics	RAD_ADVISOR_VAL	Click the Add a Characteristic button on the Selected Characteristics page.	Add a new characteristic to the dialog.

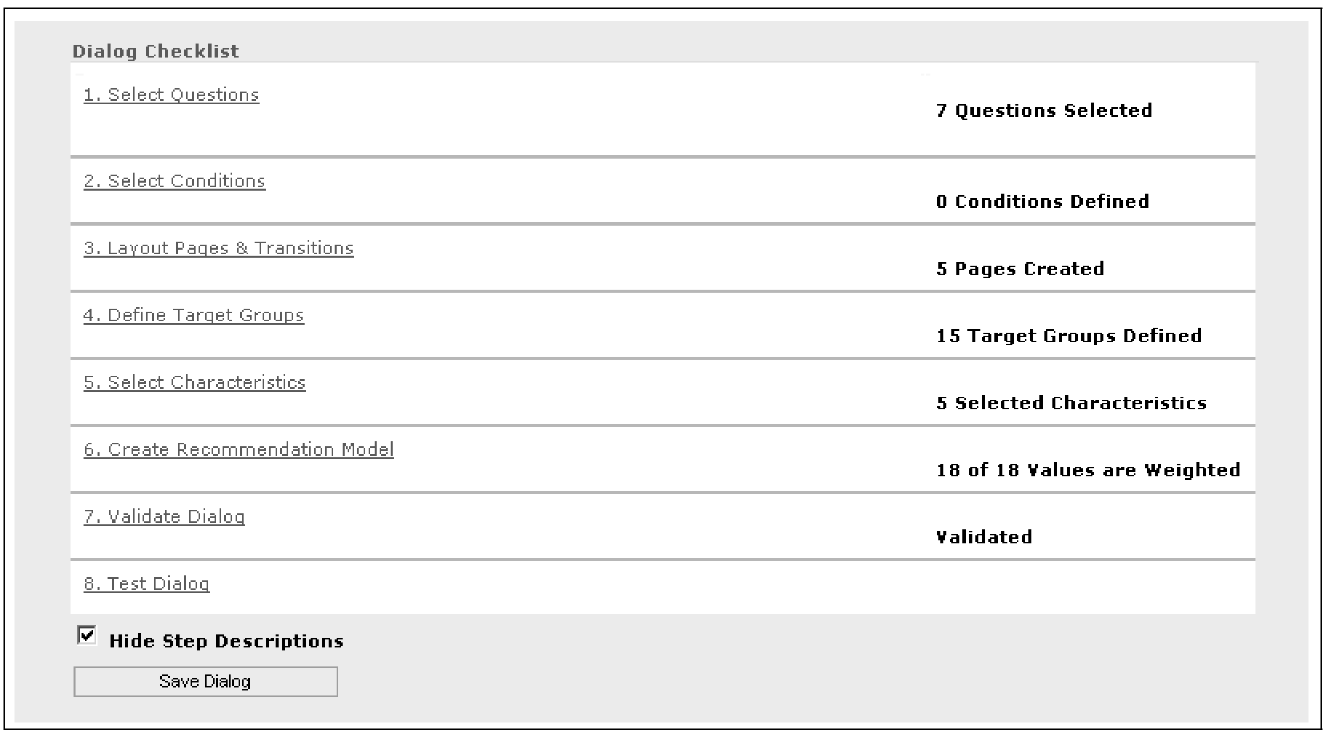
Page Name	Object Name	Navigation	Usage
Select Characteristic Values	RAD_CHAR_VAL	• Click the Select Values button on the Select Characteristics page for a characteristic to add to the dialog. • Click the name of a characteristic in the Characteristics group box on the Selected Characteristics page.	Add a new characteristic value or remove existing ones from the dialog.
Create Recommendation Model	RAD_ADVISOR_WGT	Click the Create Recommendation Model link on the Advisor Workbench page.	Set the weightings of the characteristic values. Weightings are the basis of the recommendation model and subsequently control the recommendations that are presented.
Weight Characteristic Value	RAD_WEIGHT	Click the Weight button on the Create Recommendation Model page, for a characteristic value.	Weight a characteristic value on a scale of *-100* to *100* for how applicable it is to each target group. If the characteristic value is neutral, leave it blank or enter *0*.
Test Recommendation Model	RAD_WEIGHT_TST	Click the Test Model button on the Create Recommendation Model page.	Validate and test the recommendation model. Verify that the recommendation model is consistent and provides the recommendations that you want based on the predefined target groups and weights.
Validate Dialog	RAD_ADVISOR_VALID	Click the Validate Dialog link on the Advisor Workbench page.	Identify errors or potential problems with the dialog in its current state. You must fix all errors to test and deploy the dialog.
Advisor Test Dialog	RAD_ADVISOR_TEST	Click the Test Dialog link on the Advisor Workbench page.	Select to test the dialog in either quiet or interactive mode.
Interactive Test Dialog	RAD_ADVISOR_RUN	Select Interactive mode and click the Test Dialog link on the Advisor Test Dialog page.	Walk through the dialog as a user would, view runtime output for the dialog that you have created. Debugging information (including transition rules and transition reasons) are included to help verify that the dialog is working as desired.

Working with the Advisor Workbench Tool

Access the Advisor Workbench page.



Advisor Workbench page (1 of 2)



Advisor Workbench page (2 of 2)

Use this page to create and maintain advisor dialogs and recommendation models. The list of steps in the dialog checklist depends on the advisor type.

Dialog Details

Dialog Name Enter a dialog name. There is a 30-character limit.

Advisor Type Select a dialog type. The type determines the steps that are available, the statuses that are available, and the object that is recommended. Advisor types are defined during environment preparation. Upon saving a dialog, this becomes a display-only field.

Note. You define advisor types on the Define Type page.

See Chapter 3, “Preparing the PeopleSoft Real-Time Advisor Environment,” Defining Type, page 15.

Display Template Select the template to use with the dialog. Templates control the look and feel of the runtime environment for the user.

See Chapter 5, “Defining Display Templates,” Defining Display Templates, page 88.

External Name Assign a dialog name that is viewable to the user.

Context Name Select a context to apply. The context is used by the AAF to resolve terms and conditions, and specifies what information is needed to do the resolution. The context in this circumstance is usually the calling application that will be using the dialog.

Version Information

Start Date and **End Date** Enter dates for the dialog to become valid and invalid.

Status Select Deployed to make the dialog available to calling applications. If you edit a deployed dialog, a new version is automatically created. The original version is still available to the calling application. To make the dialog inactive or unavailable to the calling applications, select Inactive. This status affects all versions of the dialog.

See Chapter 5, “Defining Display Templates,” page 87.

View Dialog Versions Click to access the Dialog Versions page and view all versions of a dialog or edit the latest version (either the edit in progress version or the deployed version). You can clone any version. You can only delete the edit in progress version.

Dialog Checklist

Select Questions Click to access the Select Questions page and choose the questions that form the dialog. Select questions from a question library.

Select Conditions Click to select external conditions to influence target groups and transitions.

Layout Pages & Transitions Click to access the Layout Pages & Transitions page and create pages and transitions for the dialog.

Define Target Groups Click to access the Define Target Groups page and define the target groups used in the weighting model.

Select Characteristics — Click to access the Selected Characteristics page and select characteristics and characteristic values to include in the dialog.

Create Recommendation Model — Click to access the Create Recommendation Model page and weight characteristic values.

Validate Dialog — Click to access the Validate Dialog page and validate the dialog. If the dialog has errors or warnings, you receive messages that clarify what needs to be done to proceed. You cannot test a dialog that has not been validated.

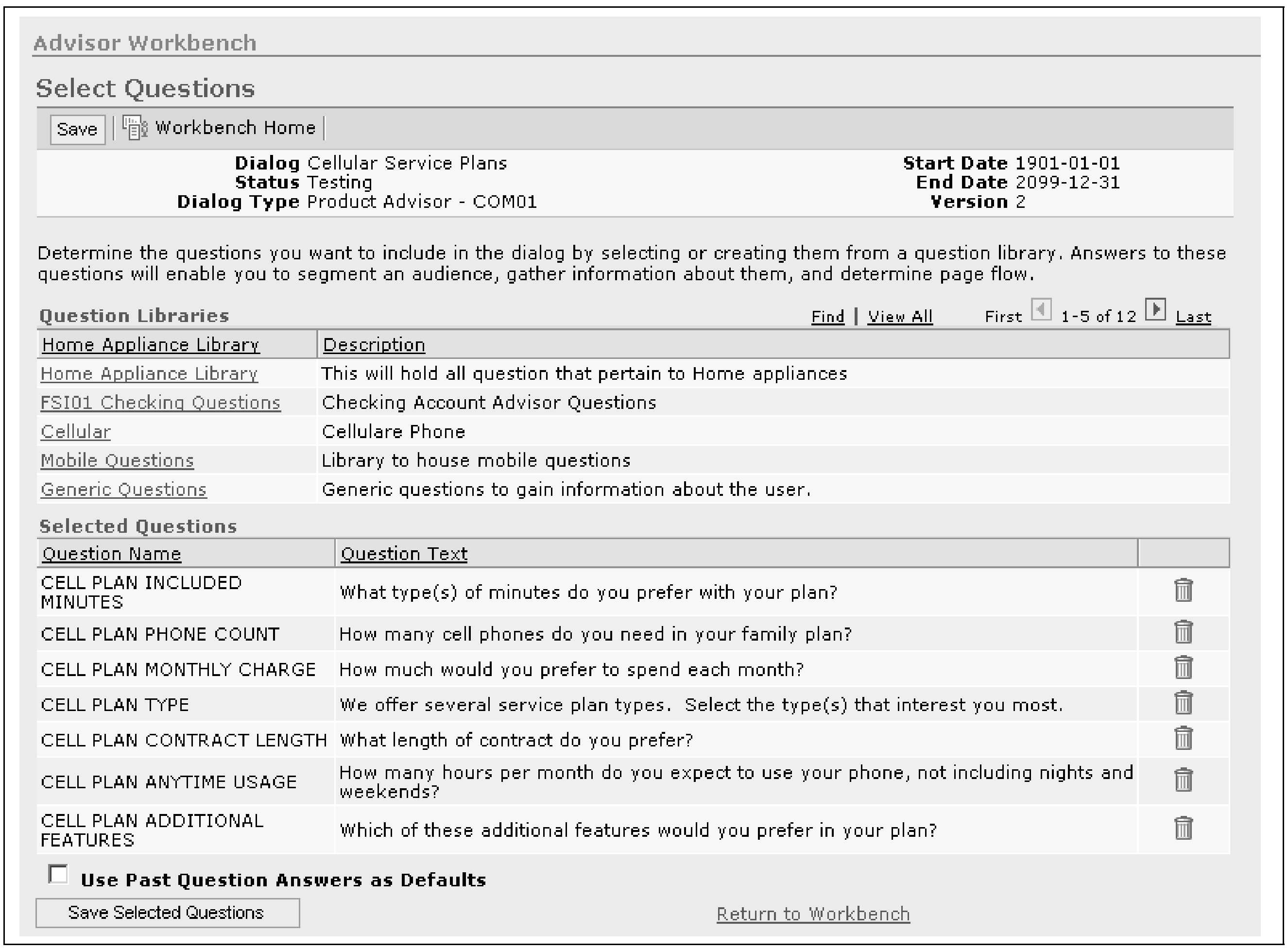
Test Dialog — Click to access the Test Dialog Information page and test the dialog in interactive or quiet mode to see how it looks to the user. Debugging information summarizes the dialog's behavior and the recommendation model's core parts.

Save Dialog — Click to save the dialog in its current state.

Hide Step Descriptions — Select to hide the descriptive text that appears beneath each dialog step on this page.

Selecting Dialog Questions

Access the Select Questions page.



Select Questions page

Select the questions for the dialog. You use questions to gather information about the user, to control transitions from one page to another, and to help classify users into target groups. The Select Questions page contains two main grids. The first grid contains a list of existing question libraries. The second grid contains a list of current questions selected for the dialog.

Question Libraries

This scroll area displays available question libraries along with a description. Click the link to access a specific question library. From the question library, you can select questions for the dialog. If you cannot find a suitable question in a stored library, then you can create a new question.

Note. If there are more than five question libraries, use the navigation controls at the top of the grid to cycle through all of the libraries. A find utility is also available at the top of the grid to locate a specific library.

Note. If a context was associated to the dialog, only questions that share that context or have no context at all will show up in the question libraries for the dialog.

Selected Questions

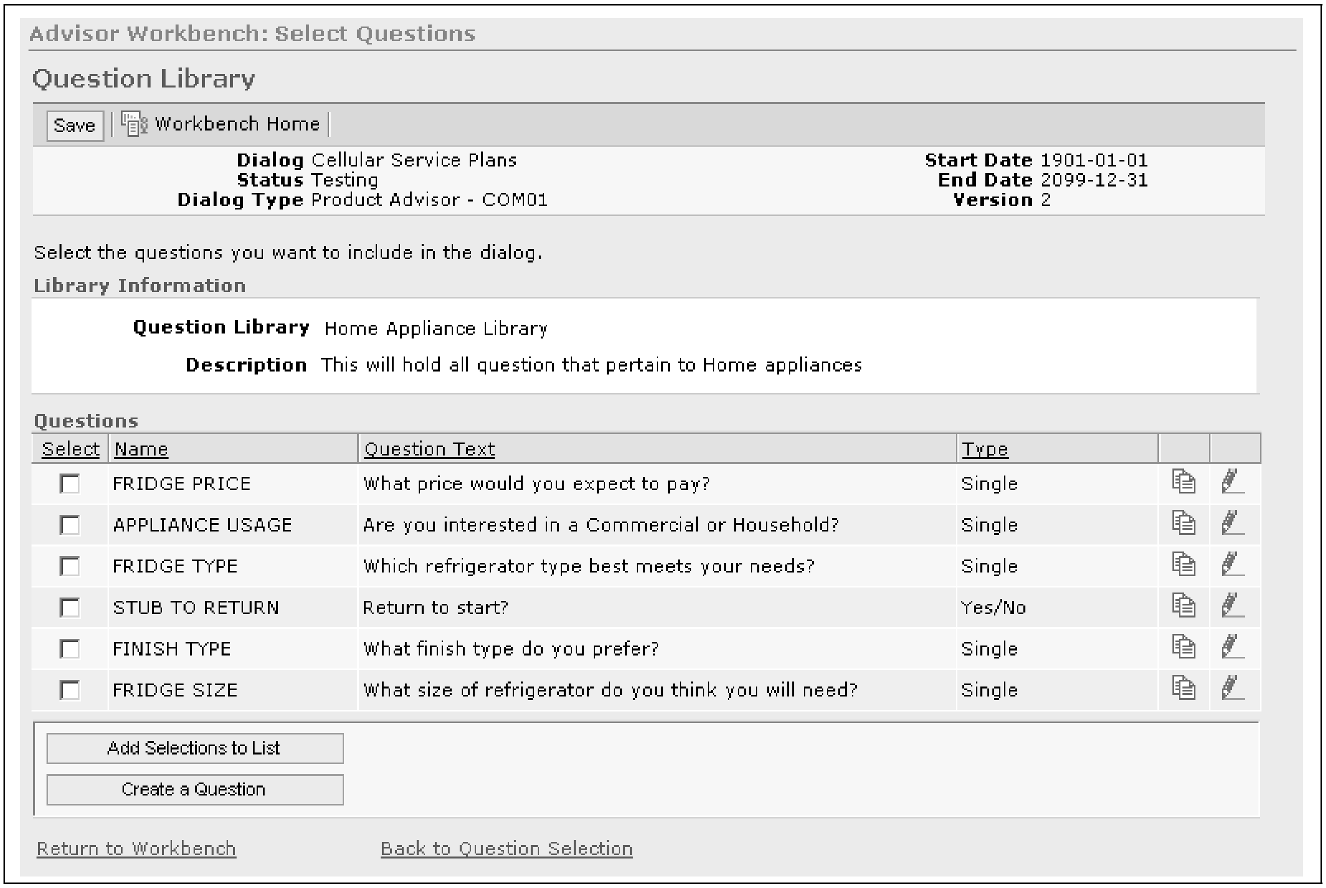
Displays the questions currently selected for use in the dialog, including the name and the text of the question. You can remove a question, and you can also save the selected questions.

Use Past Question Answers as Defaults	Select to use previously answered questions from other advisor dialogs as default values for the questions in this dialog.
Save Selected Questions	Click to save all selected questions to a dialog.

Note. You must save whenever you make changes to the question list in the dialog. This includes removing as well as adding questions.

Creating, Editing, or Cloning Questions from the Question Library

Access the Question Library page.



Question Library page

Select questions to add to the dialog, edit an existing question, clone an existing question, or create a new question.

Questions

Select Select to add the question to the dialog, or clear to remove the question.

Type Displays the type of question, such as *Yes/No, Single Select,* or *Multiple Select.*

Clone Click to create a new question with the same elements and save it as a copy of the question.

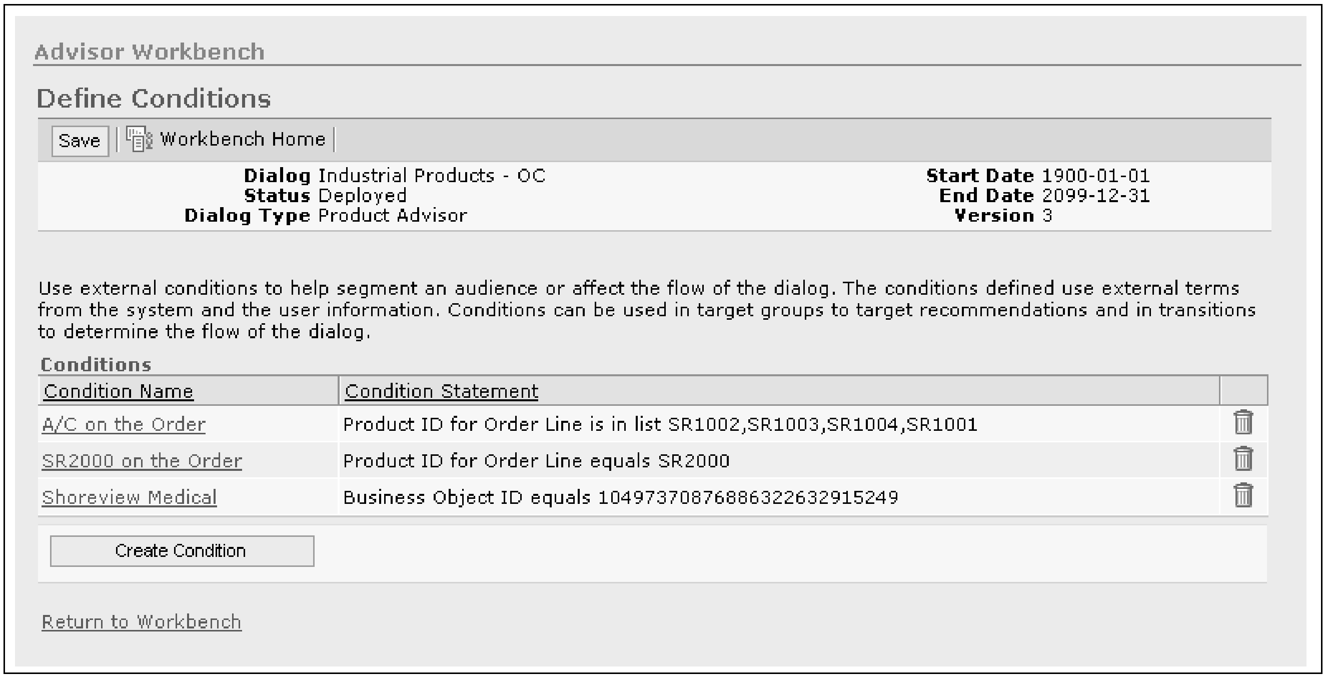
Edit Click to edit the question.

Add Selections to List Click to add the questions that you've selected to a temporary list of questions and remove the questions that you have cleared. You must save the list on the Select Questions page for the dialog's list to be updated.

Create a Question Click to access Set Up a Question page and add a new question.

Defining Conditions

Access the Define Conditions page.



Define Conditions page

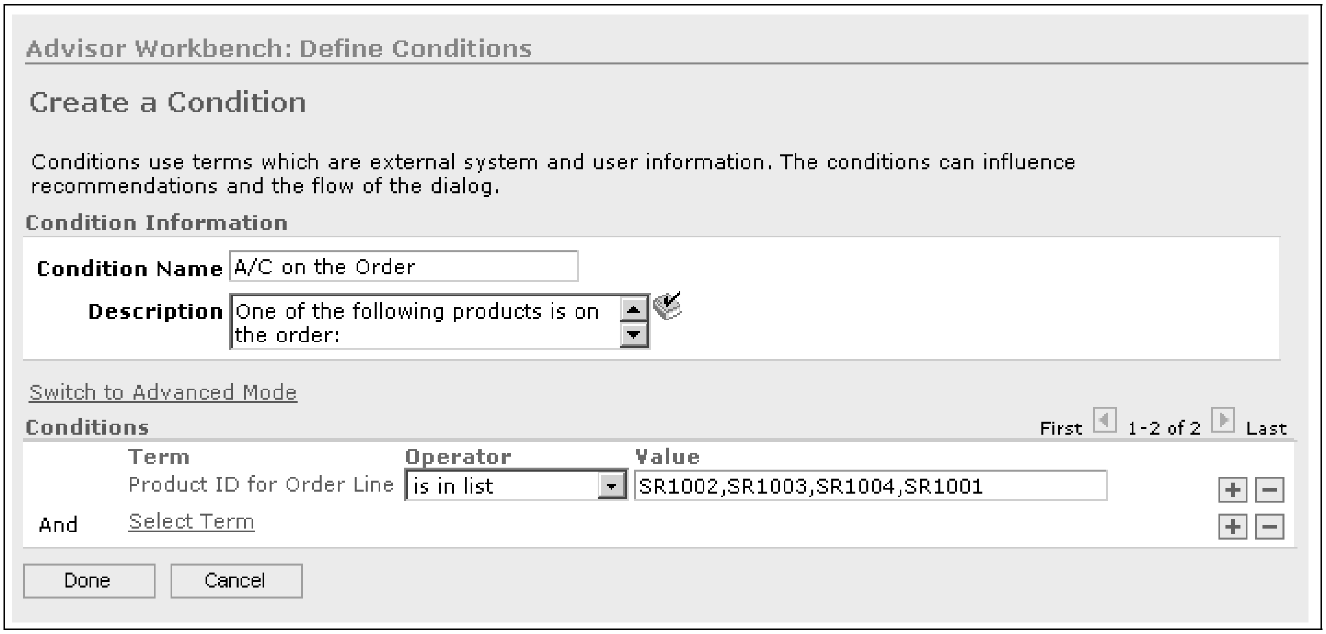
Use external conditions to segment an audience or affect the flow of the dialog. The defined conditions use external terms from the system and user information. The terms come from the AAF and the context of the dialog determines the available terms. Conditions can be used in target groups to specify recommendations and in transitions to determine the flow of the dialog.

Conditions

Condition Name	Click the link to access the Create a Condition page and edit the condition.
Condition Statement	Displays the condition statement, including term, operator, and value.
Delete Condition	Click to delete the condition.
Create Condition	Click to access the Create a Condition page and create a new condition.

Creating Conditions

Access the Create a Condition page.



Create a Condition page

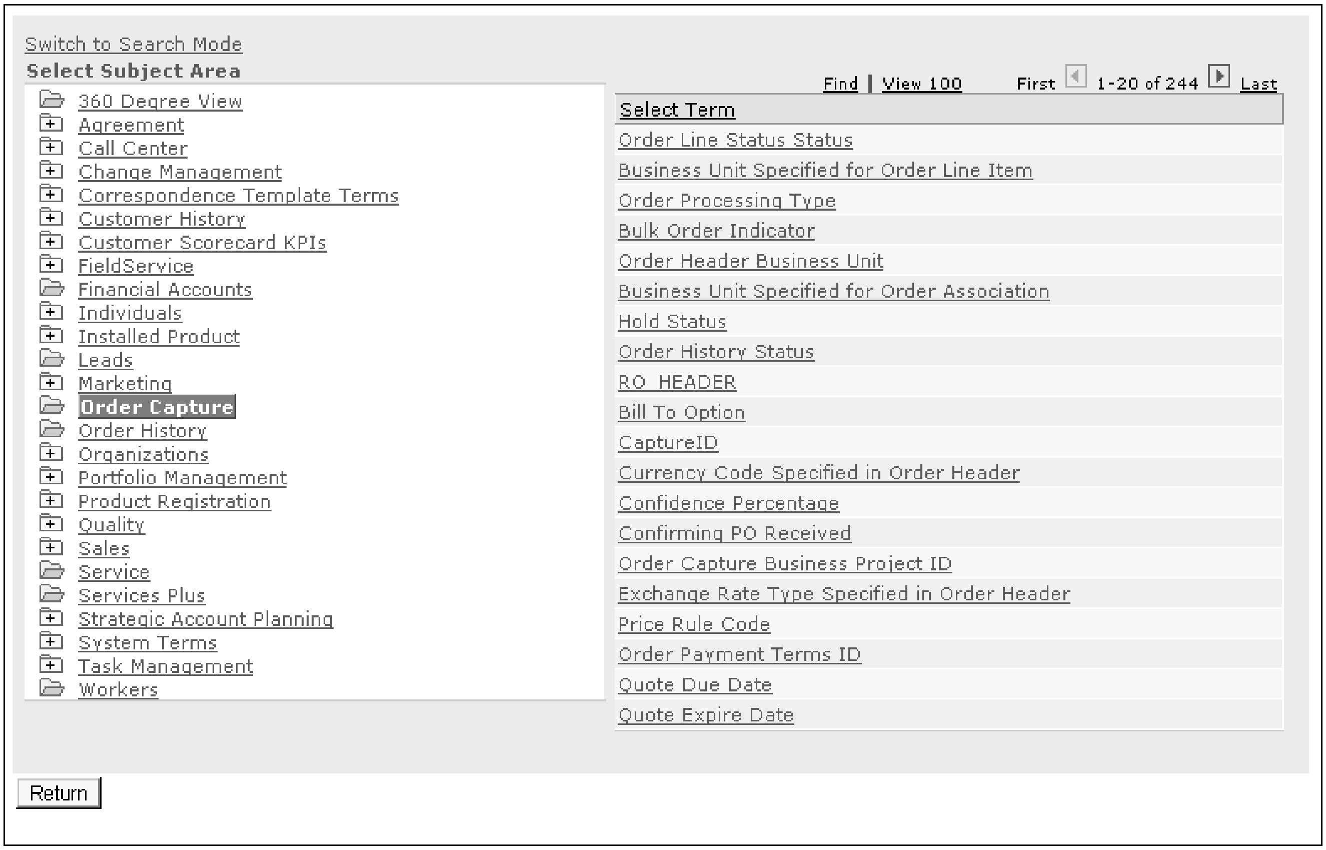
Create or edit a condition to bring in external system and user information. This information encapsulated in terms is available from the AAF. The context of the dialog, provides the available terms for the system.

Conditions

Term	Displays the term selected on the Select Term page.
Value	Enter a value if required by the operator.
Select Term	Click to access the Select Term page.

Selecting Terms

Access the Select Terms page.

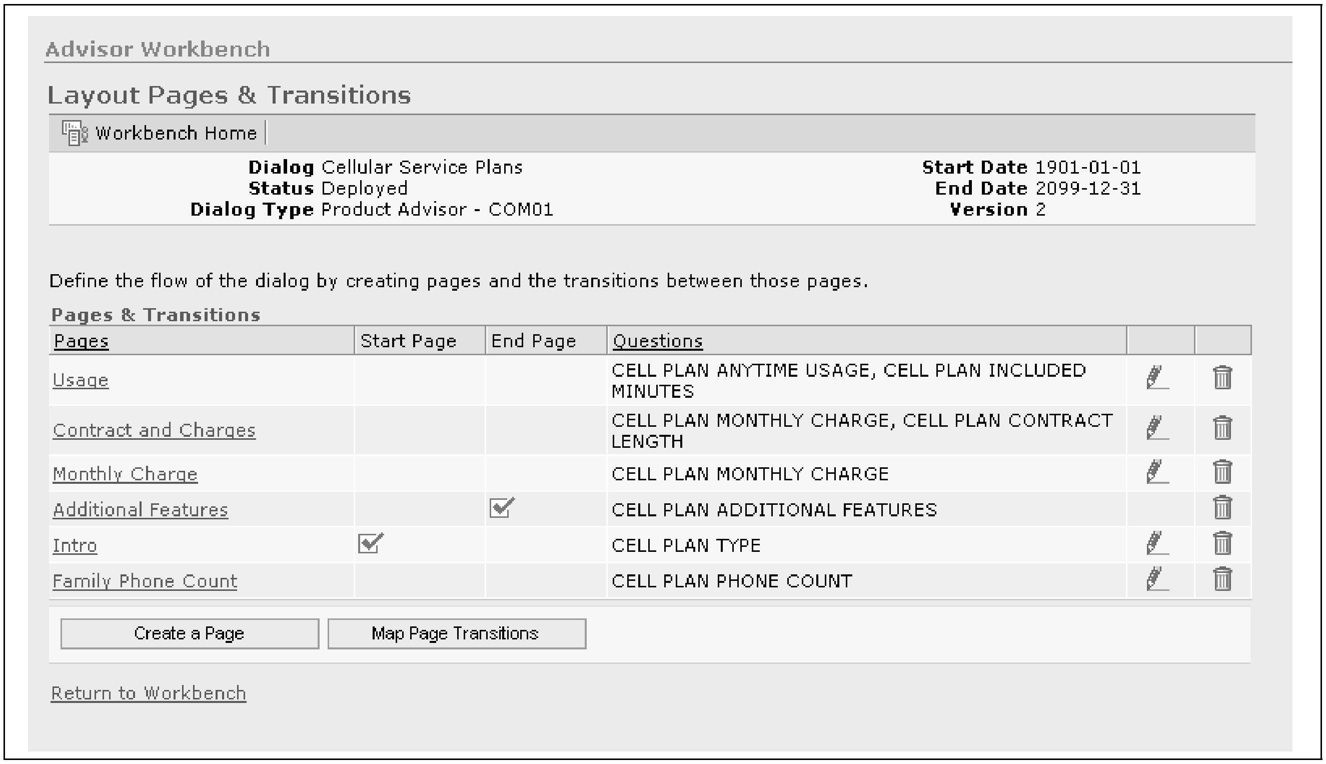


Select Terms page

Select or search for terms for condition statements. Terms personalize the flow of the dialog or for targeting recommendations. The tree shows the available terms for the dialog's context. Once a term is selected, the term is entered into the Create a Condition page and the Condition statement can be completed by adding an operator and value.

Working with Pages and Transitions

Access the Layout Pages & Transitions page.



Layout Pages & Transitions page

Use this page to create and edit pages and transitions. Pages are presented to the user at runtime, and they define the information to be gathered as well as the flow of the dialog.

Pages & Transitions

This grid only appears if there are existing pages in the dialog.

Questions Displays the questions that will appear on the page, separated by commas.

Edit Transitions Click to edit the transitions for a page. Transitions determine the flow of the dialog.

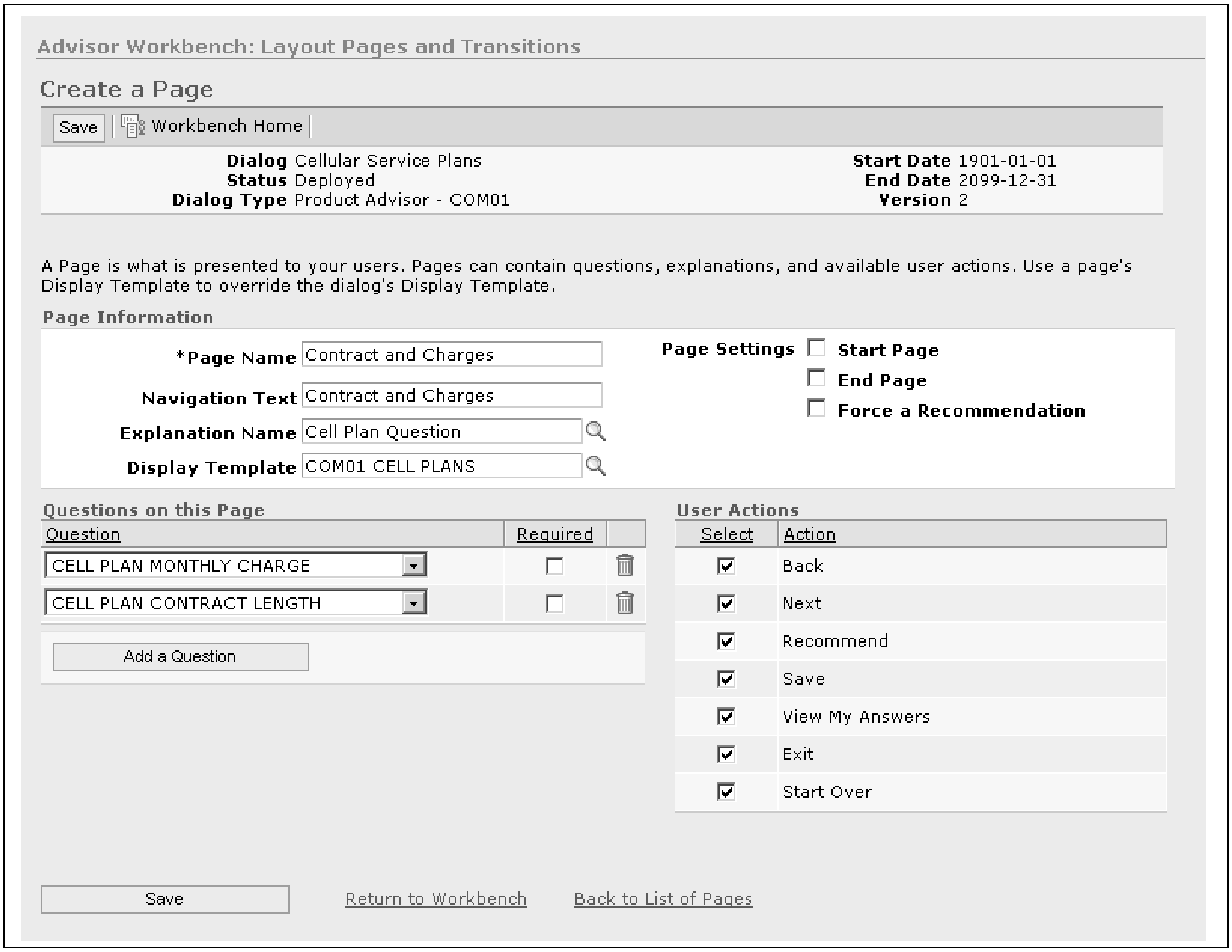
Delete Page Click to delete the page from the dialog. You may get a warning if the page is referenced elsewhere in the dialog. If you delete the page, you must clean up relevant references or the dialog will not properly validate. Use the Map Page Transitions button or the Validate Dialog link to see invalid page references.

Create a Page Click to create a new page for the dialog.

Map Page Transitions Click to view the page flow for the dialog, including transitions and transition conditions.

Creating Pages

Access the Create a Page page.



Create a Page page

Use this page to create pages for the user. Within the pages are questions, explanations, and user actions. You can override the dialog template by choosing a page template if you want the page to have a different look and feel from the overall dialog.

Page Information

Page Name Enter the name of the page as it appears in the Advisor Workbench tool. There is a 30-character limit.

Start Page Select if this page is where you want the dialog to start at runtime. You must identify one start page for every dialog.

End Page Select to identify an end page for the dialog; there can be more than one end page, depending on the logic of the dialog.

Force a Recommendation Select to force a recommendation on the next page in the dialog. When a user clicks the Next button, he or she is automatically shown the recommendation page. The transitions from this page are used when the Next button on the recommendation page is clicked.

Navigation Text Enter text to appear in the path guide and on the runtime page, if the template is set up to display the page name. There is a 75-character limit.

Explanation Name	Select an explanation. The explanation must be a *Text* type for a page. Explanations appear at the top of the page at runtime. The search automatically filters out all non-text explanation types.
Display Template	Select a display template for the page. You can override the dialog template if you want this page to be different from another page in the dialog.

Questions on this Page

Question	Select the questions to appear on this page during runtime from the available questions that have been added to the dialog. If you do not see the question that you want, add the question to the dialog or create the question. You add questions on the Select Questions page. A question cannot be used more than once per page, but it can be used on multiple pages. At runtime, questions appear in the order that they appear in this grid.
Required	Select if the dialog requires the question to be answered. The user will not be able to leave this page in the runtime until the question is answered.
Remove	Click to delete the question from the page.
Add a Question	Click to add another question to the page.

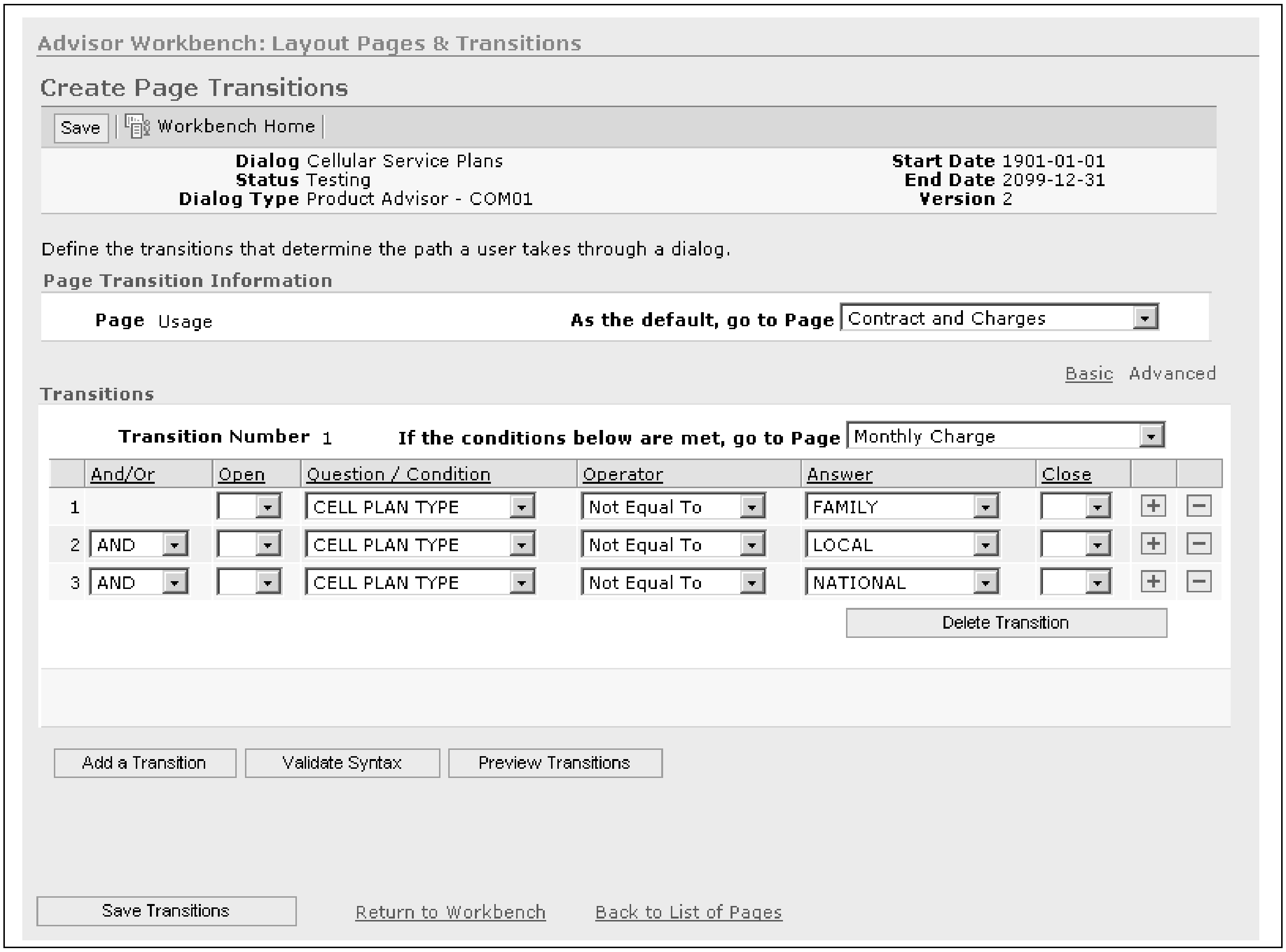
User Actions

Action	Select the actions to display to the user for this page. The sequence of buttons was determined in the Define Actions page during Real-Time Advisor environment preparation. See Chapter 3, "Preparing the PeopleSoft Real-Time Advisor Environment," Defining Actions, page 10.

See Chapter 4, "Setting Up PeopleSoft Real-Time Advisor Dialogs," Creating, Editing, or Cloning Questions from the Question Library, page 48.

Creating Page Transitions and Transition Conditions

Access the Create Page Transitions page.



Create Page Transitions page

Page transitions contain the logic that determines the flow of the dialog. The user's answers to questions along with conditions determine the next page that the user sees.

As the default, go to Page: Define a default transition for the page. Select the page to transition to if you do not want to define page transitions, or if none of the page transitions set up are successful during runtime.

Basic and **Advanced** Click the Advanced link to open up fields so that you can use complex logic to create page transitions. With the advanced setting, you can use nesting and full-featured Boolean operators.

Note. You should be familiar with Boolean logic if you plan to use Advanced transition mode.

Transitions

Transition Number Displays the number of the transitions defined for the dialog. At runtime, transition logic is performed according to transition number order.

If the conditions below are met, go to Page Select from a list of the dialog pages, other than the current page. This is the page the dialog will go to if the transition is successful.

And/Or If you choose *And,* each statement must be met. If you choose *Or,* then either statement can be met for a successful transition.

Open Use open parentheses to nest logic. Available in Advanced mode only.

Question/Condition Select dialog questions or conditions. The drop-down list box contains all of the questions and conditions associated with the dialog. Selected questions or conditions are evaluated against the transition logic to determine the flow of the transitions. If the transition uses a question that has not yet been answered by the user, then that part of the statement evaluates to false.

Note. Freeform-type questions do not appear here.

Operator In Basic mode, the operator is *Equal to,* but all Boolean operators are available in Advanced mode.

Answer Answers are available for *Single-Select, Multiple-Select,* and *Yes/No* question types. If the question requires a numeric answer, then an Answer Number edit box appears instead of the answer. Enter the answer that you want the transition to use in the evaluation. The answer is compared to the answers that a user has given or the condition value to determine if the transition is successful or not.

Close Use closed parentheses to nest logic. Available in Advanced mode only.

Delete Transition Click to delete the transition.

Add a Transition Click to add a new transition grid.

Validate Syntax Click to validate transition logic. A Transition Errors grid appears to identify syntax errors so that you can correct them. In the error grid, the transition number refers to the transition number that is in error. The transition row points you to the grid row that needs fixing, and error text explains the problem.

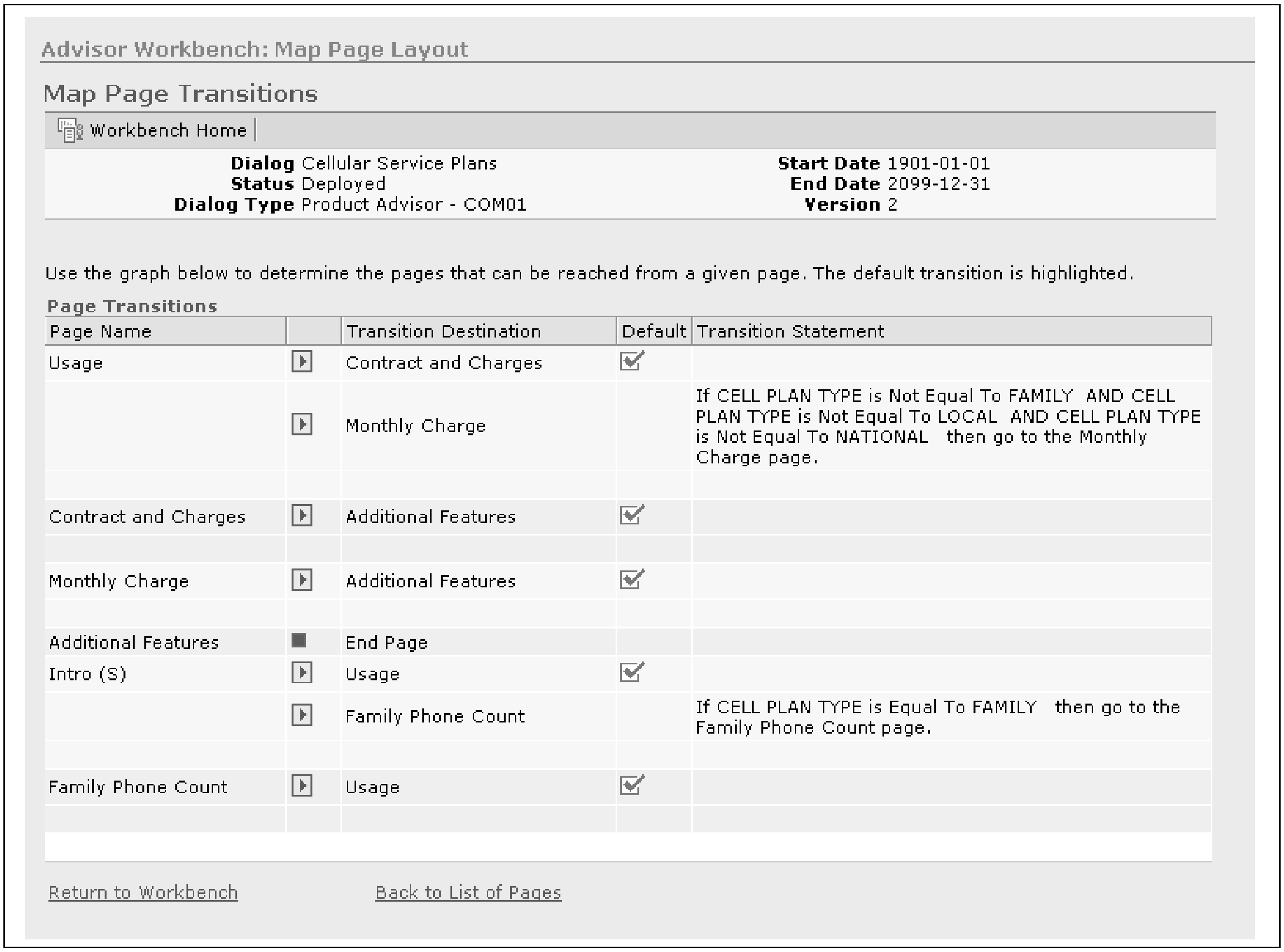
Preview Transitions Click to display the transition logic in sentence form beneath each transition. This provides a clear textual view of the transition logic that you have created.

Save Transitions Click to save transitions. Any changes (including deletions) must be saved to update the transitions for the page.

Note. When you click the Save Transitions button, the Create Transitions button on the Layout Pages & Transitions page dynamically changes to an Edit Transitions button to edit existing transitions.

Previewing Page Transitions and Transition Statements

Access the Map Page Transitions page.



Map Page Transitions

The Map Page Transitions page is a display-only view of dialog pages and transitions.

Page Transitions

Page Name Displays the pages that you have created for the dialog. A page marked with an *(S)* indicates the start page for the dialog.


The arrow indicates that the page has transitions. The red square button signifies an end page that has no transitions.

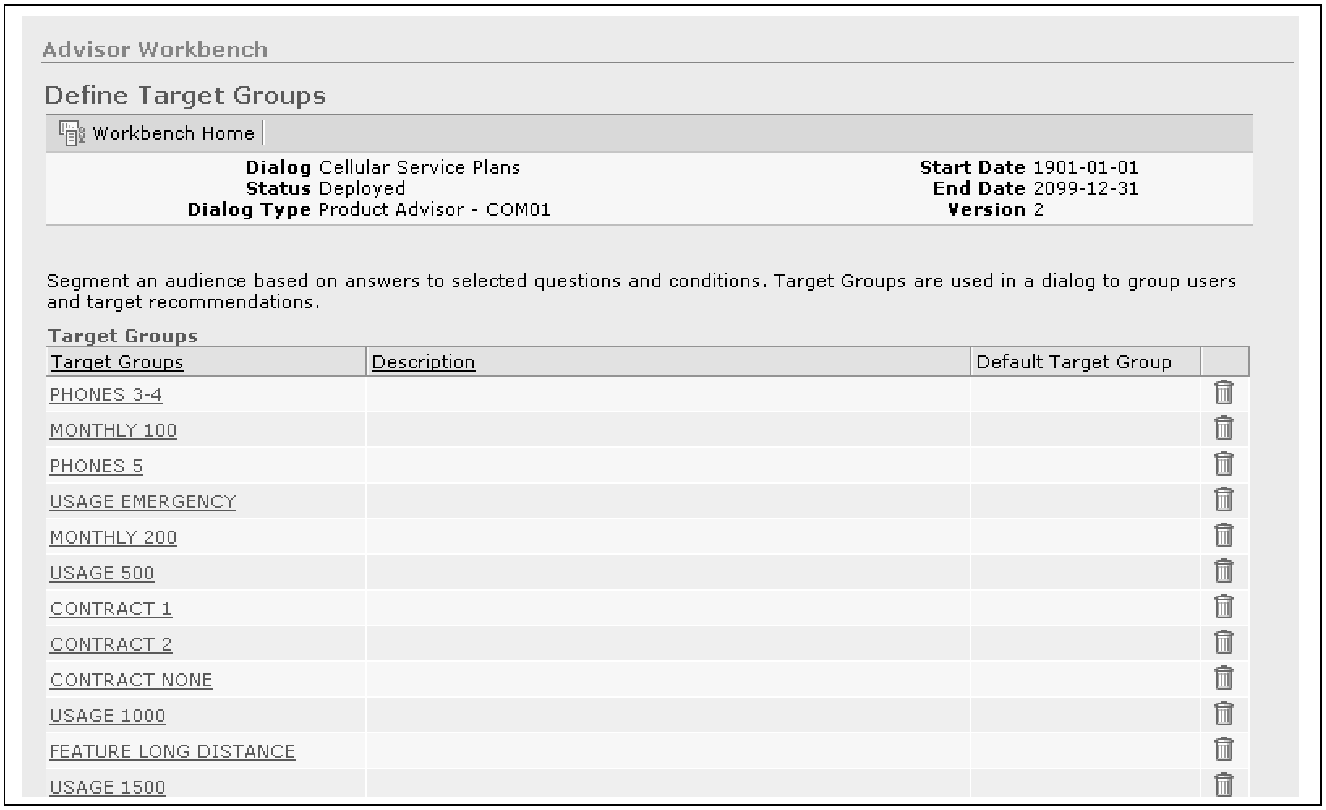
Transition Destination Lists the destination pages for the transition. If a page selected as a transition destination has been deleted, this column displays *** Page No Longer Valid***, and the transition must be fixed before the dialog can be validated.

Default A green check next to the destination page indicates the default destination for the transition.

Transition Statements Lists the statements by which the transition moves the user to the specified page; same as the clear textual view of the transition logic available through Preview Transitions.

Working with Target Groups

Access the Define Target Groups page.



Advisor Workbench

Define Target Groups

Workbench Home

Dialog Cellular Service Plans
Status Deployed
Dialog Type Product Advisor - COM01

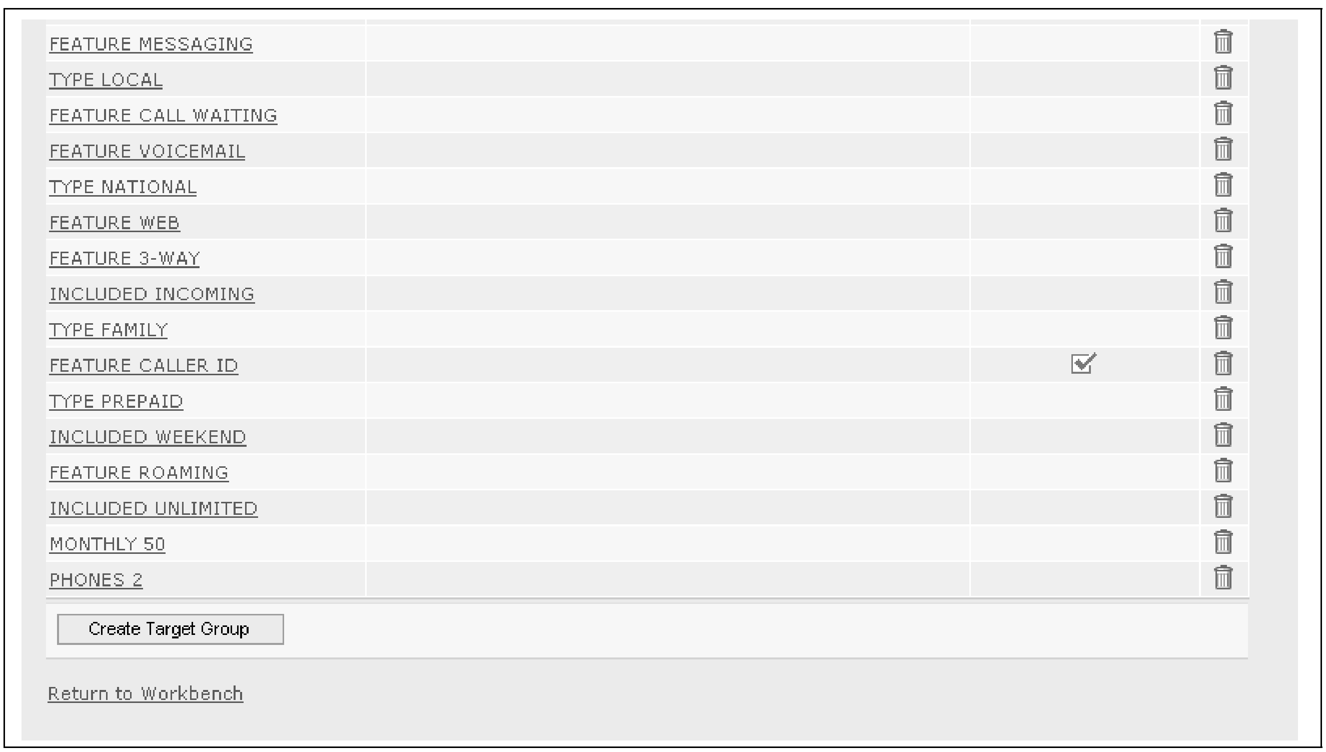
Start Date 1901-01-01
End Date 2099-12-31
Version 2

Segment an audience based on answers to selected questions and conditions. Target Groups are used in a dialog to group users and target recommendations.

Target Groups

Target Groups	Description	Default Target Group	
PHONES 3-4			
MONTHLY 100			
PHONES 5			
USAGE EMERGENCY			
MONTHLY 200			
USAGE 500			
CONTRACT 1			
CONTRACT 2			
CONTRACT NONE			
USAGE 1000			
FEATURE LONG DISTANCE			
USAGE 1500			

Define Target Groups page (1 of 2)



Target Groups	Description	Default Target Group	
FEATURE MESSAGING			
TYPE LOCAL			
FEATURE CALL WAITING			
FEATURE VOICEMAIL			
TYPE NATIONAL			
FEATURE WEB			
FEATURE 3-WAY			
INCLUDED INCOMING			
TYPE FAMILY			
FEATURE CALLER ID		✓	
TYPE PREPAID			
INCLUDED WEEKEND			
FEATURE ROAMING			
INCLUDED UNLIMITED			
MONTHLY 50			
PHONES 2			

Create Target Group

Return to Workbench

Define Target Groups page (2 of 2)

The Define Target Groups page lists the target groups created for the dialog. Target groups segment users based on answers to questions and conditions. The Real-Time Advisor recommendation model uses target groups to recommend appropriate products, services, or solutions.

Target Groups

This grid only appears if there are existing target groups defined for the dialog.

Target Groups Displays the target groups connected to the dialog. Click the link for the target group to edit a group.

Default Target Group A green check indicates a default target group. The default target group is the target group that a user belongs to if, after evaluating the user's answers against the existing target groups, the user falls into no other target group.

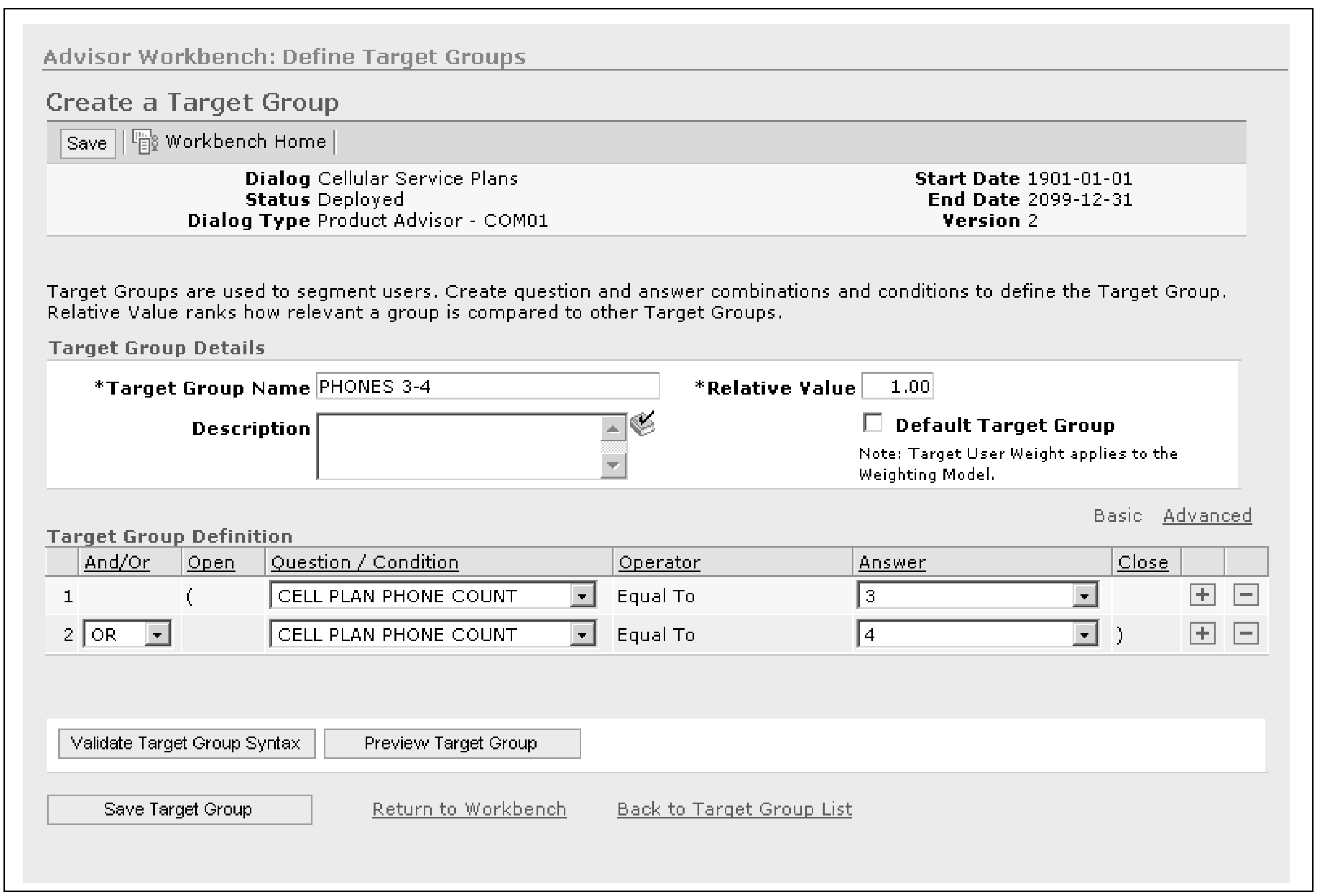
Note. Only one target group per dialog can be marked as the default.

See Chapter 4, "Setting Up PeopleSoft Real-Time Advisor Dialogs," Creating Dialogs Using the Advisor Workbench Tool, page 41.

Create a Target Group Click to create a target group.

Creating Target Groups

Access the Create a Target Group page.



Create a Target Group page

Target Group Details

Relative Value

Enter a value to determine the importance of the target group relative to other target groups. Values range from *0* to *10*. Relative value is used as a multiplier during the recommendation process. If users that fall into this target group have predictable buying habits (in the case of product advising, for example), you may want to give the target group a higher relative value. If a user falls into multiple target groups, recommendations are slanted towards the target group with the highest relative value.

Default Target Group

Select to make this group the default target group for the dialog. If a user does not fall into any target group based on answers to questions, the user is placed in the default target group.

Note. You must have one default target group per dialog.

Basic and **Advanced**

Click the Advanced link to display fields so that you can use complex logic to create the target groups. The Advanced setting provides nesting and full-featured Boolean operators.

Note. You should be familiar with Boolean logic to take advantage of Advanced target group mode.

Target Group Definition

With definition logic, you can segment the audience to target recommendations.

And/Or

If you choose *And*, each statement must be met. If you choose *Or*, then either statement can be met for a the segment evaluation to be true.

Open

Use open parentheses nest logic. Open parentheses are available in Advanced mode only.

Question/Condition

Select dialog questions or conditions. The drop-down list box contains questions and conditions associated with the dialog. Selected questions or conditions are evaluated to determine whether or not the user falls into the target group. If a target group uses a question that has not yet been answered by the user, then that part of the statement evaluates to false and depending on the logic, the user may not be part of that target group.

Note. Freeform questions do not appear in this list.

Operator

In Basic mode, the operator is *Equal to.* All Boolean operators are available in Advanced mode.

Answer

Enter the answer that you want the target group to use in the question evaluation. Answers are available for *Single-Select, Multiple-Select,* and *Yes/No* question types. If the question requires a numeric answer, then the Answer Input edit box appears as opposed to a list of answers. The answer that you indicate is compared to the answers that the user has given to determine if the user is part of this target group.

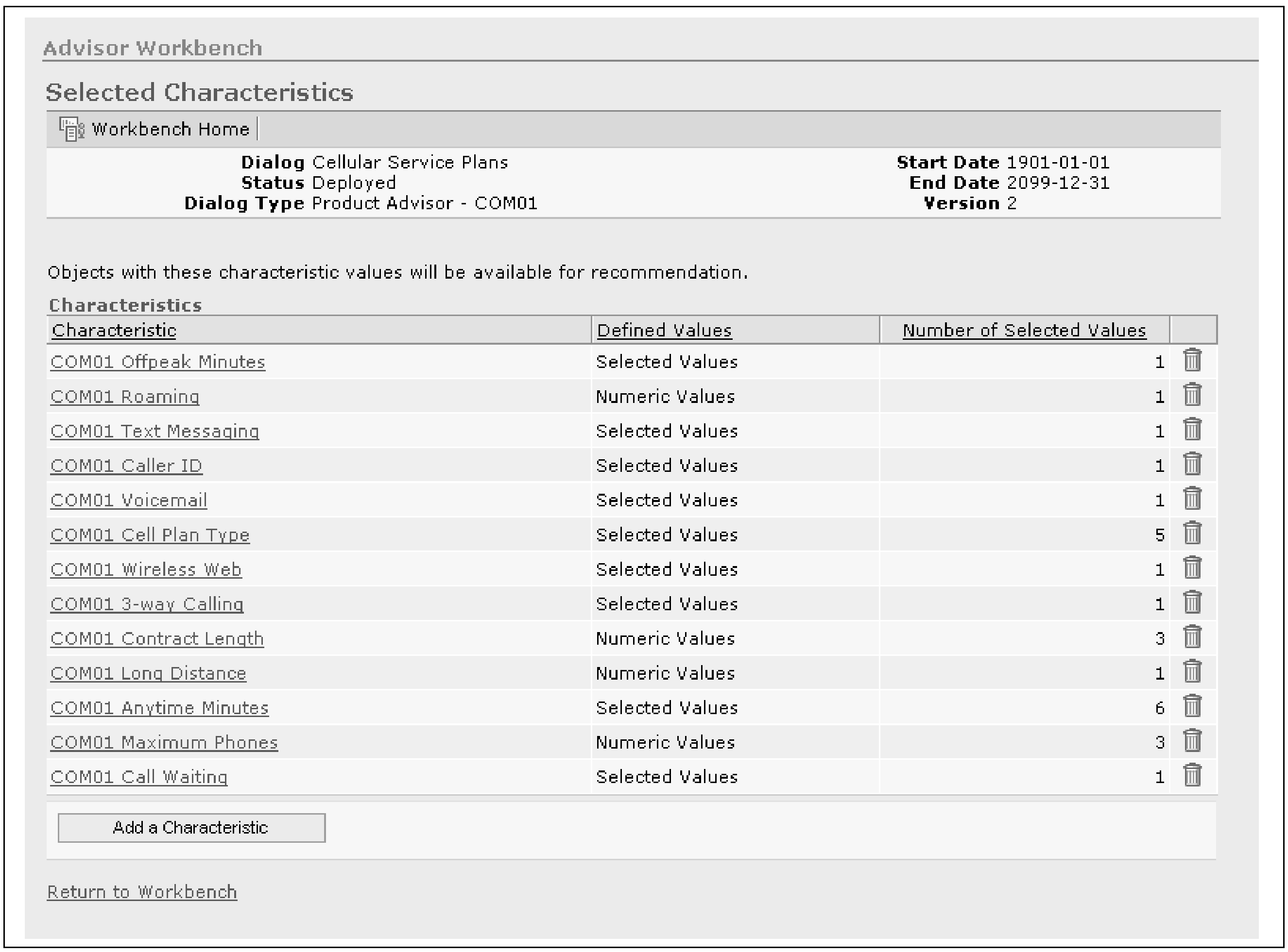
Answer Input

For *Numeric* question types, enter the number for the question answer to use in the question evaluation. The number is compared to the answers the user has given to determine if the user is part of this target group.

Close	Use close parentheses to nest logic. Closed parentheses are only available in Advanced mode.
Validate Target Group Syntax	Click to validate target group logic. A Target Group Errors group box appears to identify syntax errors so that you can correct them. The target group row points you to the grid row that needs fixing, and error text explains the problem.
Preview Target Group	Click to display the target group logic in sentence form beneath each target group. This provides a clear textual view of the target group logic that you have created.
Save Target Group	Click to save the target group. You must save all changes, including row deletions, to update the target group for the dialog.

Working with Selected Characteristics and Selected Characteristic Values

Access the Selected Characteristics page.



Selected Characteristics page

You can view the characteristics and characteristic values that have been added to the dialog and weighted against target groups. They are now part of the recommendation model. Only objects with these characteristic values are available for recommendation.

Note. Characteristics are created during setup by the person preparing the Real-Time Advisor environment. Characteristics are associated to types. Characteristics available for one type may not be available for another.

Characteristics

The Characteristics grid only appears if you have selected characteristics for the dialog.

Characteristic Displays the characteristics that have been selected for use in this dialog. To edit the existing values for a specific characteristic, click the characteristic name.

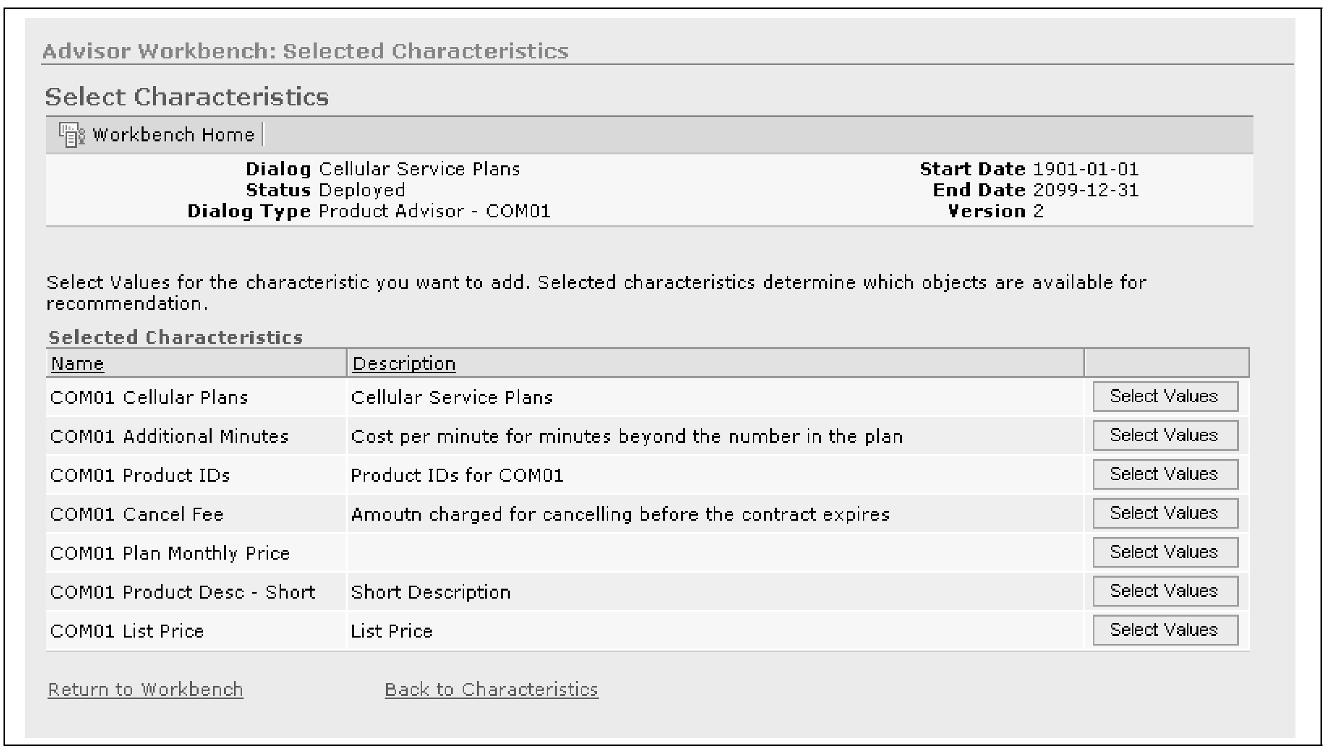
Defined Values Displays whether the characteristic values included in the dialog are *Selected Values* from the value list or *Numeric Values.*

Number of Selected Values Displays the number of characteristic values that are associated to this characteristic for the dialog.

Add a Characteristic Click to access the Select Characteristic Values page and add a new characteristic to the dialog.

Viewing Characteristics and Selecting Values for Those Characteristics

Access the Select Characteristics page.



Select Characteristics page

Selected Characteristics

The characteristics shown in this list have not been added to the dialog, but are defined for use with the dialog advisor type.

Select Values	Click to access the Characteristic Value page and select values. Once you have selected values for the characteristic, the characteristic is added to the dialog.

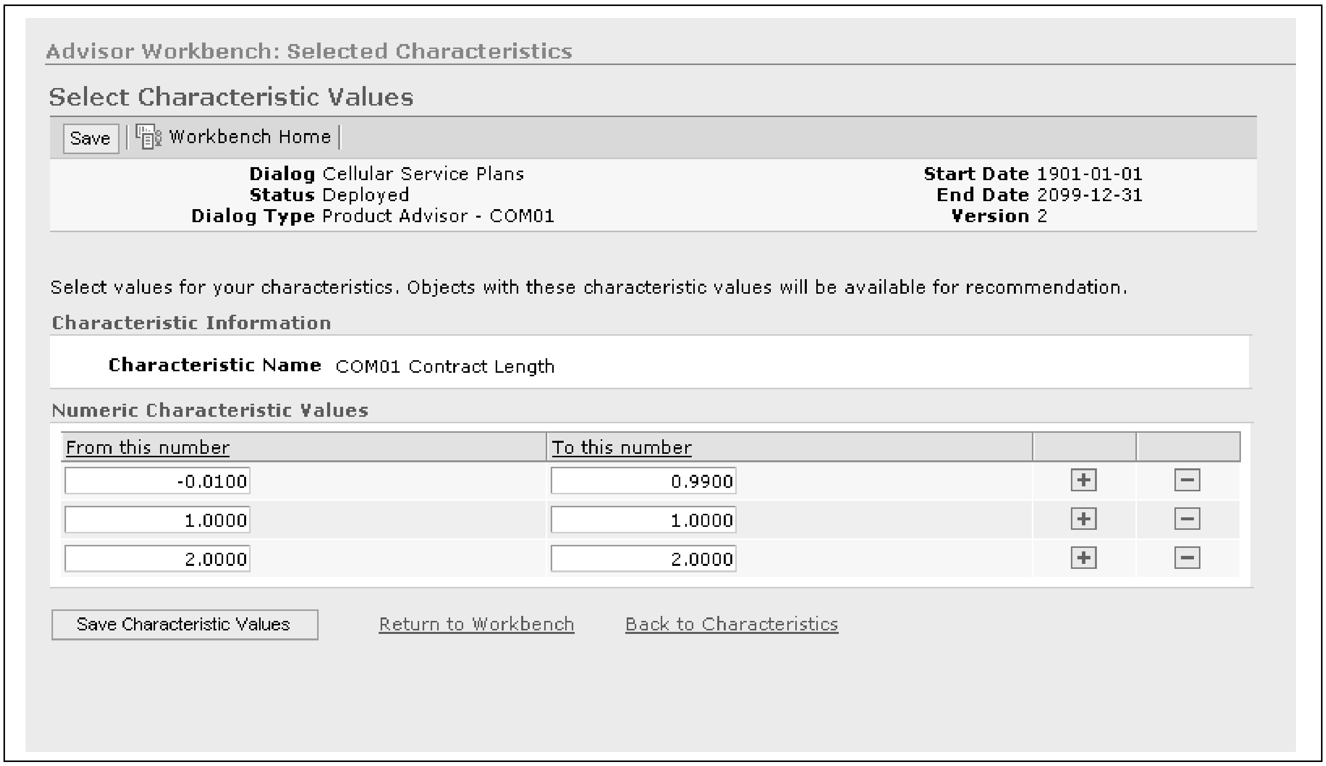
Note. If you cannot find a characteristic, check to make sure it is not already included in the dialog by returning to the Selected Characteristics page. Otherwise, you need to define a characteristic through the Real-Time Advisor environment setup.

See Also

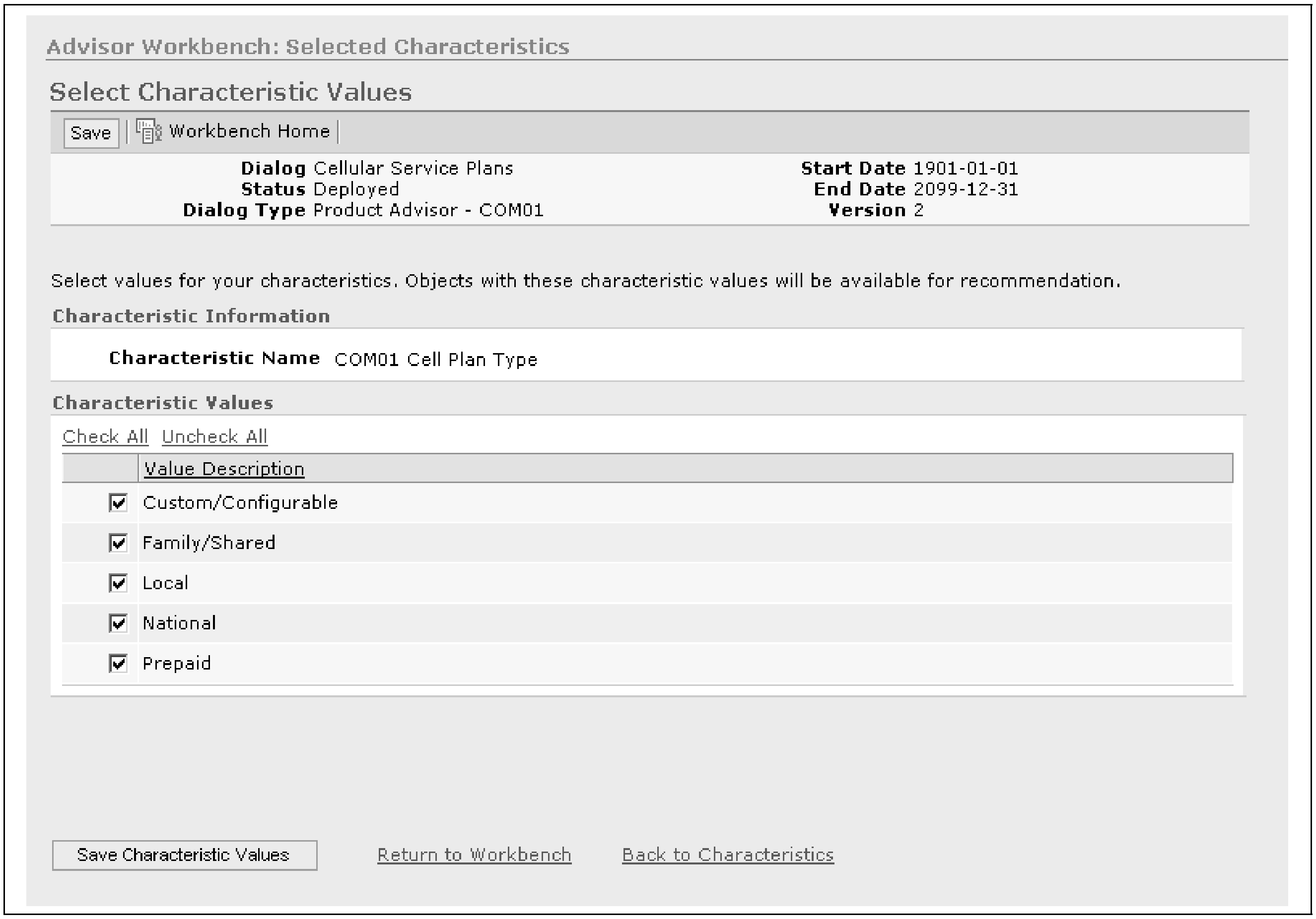
Chapter 3, "Preparing the PeopleSoft Real-Time Advisor Environment," Defining Characteristic Mapping, page 18

Creating or Editing Characteristic Values

Access the Select Characteristic Values page.



Select Characteristic Values page



Select Characteristic Values page (for mapped value types)

Select characteristic values to use when filtering and grouping recommendable objects.

Note. The page changes based upon the characteristic type.

Numeric Characteristic Values

These fields appear for numeric types.

From this number and **To this number**	Enter numeric ranges for this characteristic. These ranges should represent the groups to use when defining the recommendation model, such as price ranges. Objects with the values that you specify here constitute the recommendation pool. You can make several or many groupings, each can be weighted differently in the recommendation model.
Save Characteristic Values	Click to save all characteristic values. You can then use them in the recommendation model.

Mapped Characteristic Values

These fields appear for mapped value types or mappings with predefined values.

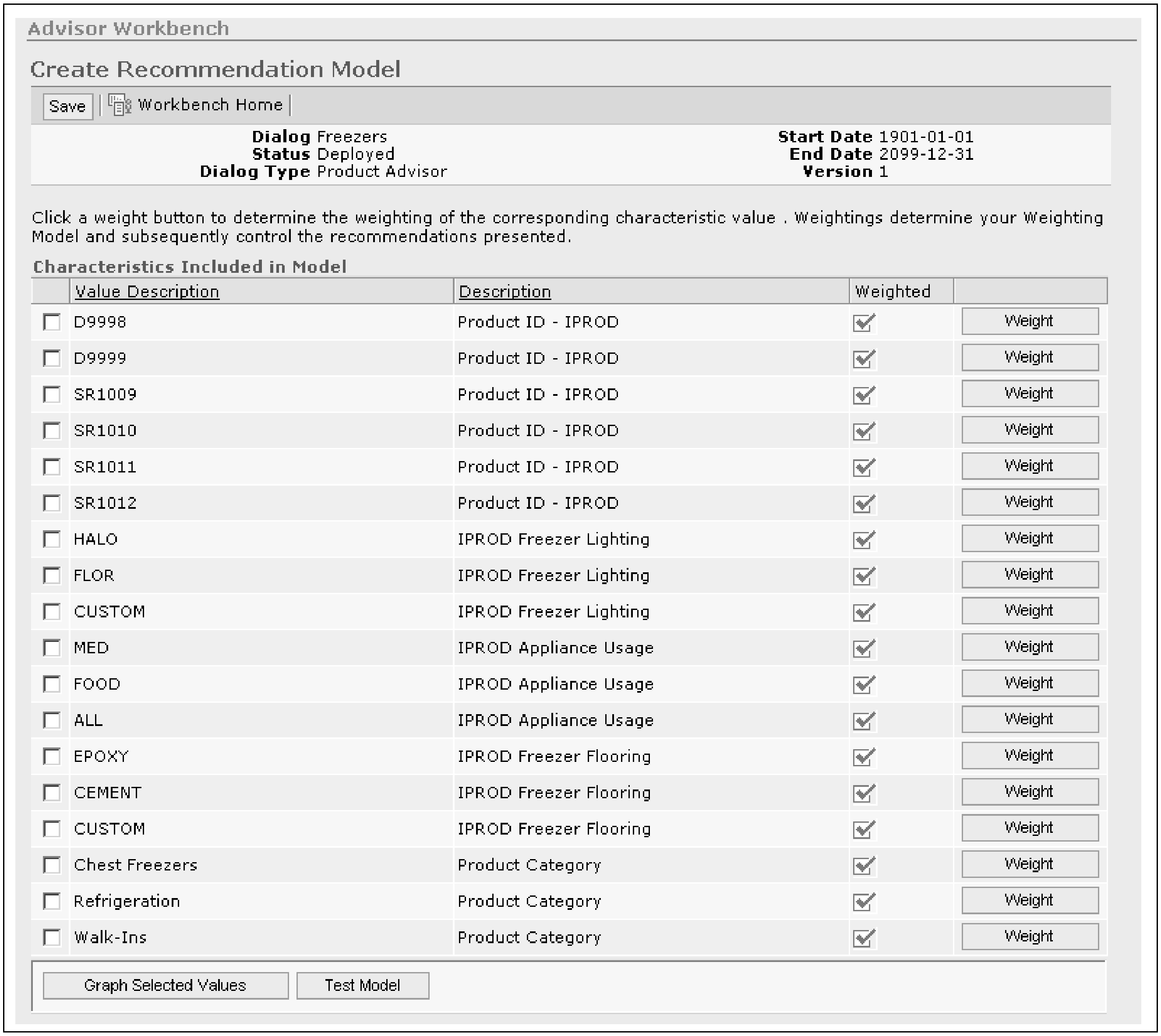
Value Description	Select the characteristic values to include in the recommendation model. These characteristic values should identify the objects

that are available for recommendation, and they should be able to distinguish one object from another.

Save Characteristic Values Click to save all characteristic values to use in the recommendation model.

Creating Recommendation Models

Access the Create Recommendation Model page.



Create Recommendation Model page

This page lists the characteristics and the values that are part of the recommendation model. Use the weighting page to weight how applicable the characteristic value is to a target group.

Characteristics Included in Model

Value Description Displays characteristic values that are in the recommendation model.

Description Displays the characteristics to which the value belongs.

Weighted A green check indicates that the characteristic value is weighted.

Weight Click to access the Weight Characteristic Value page and enter weights for the characteristic value.

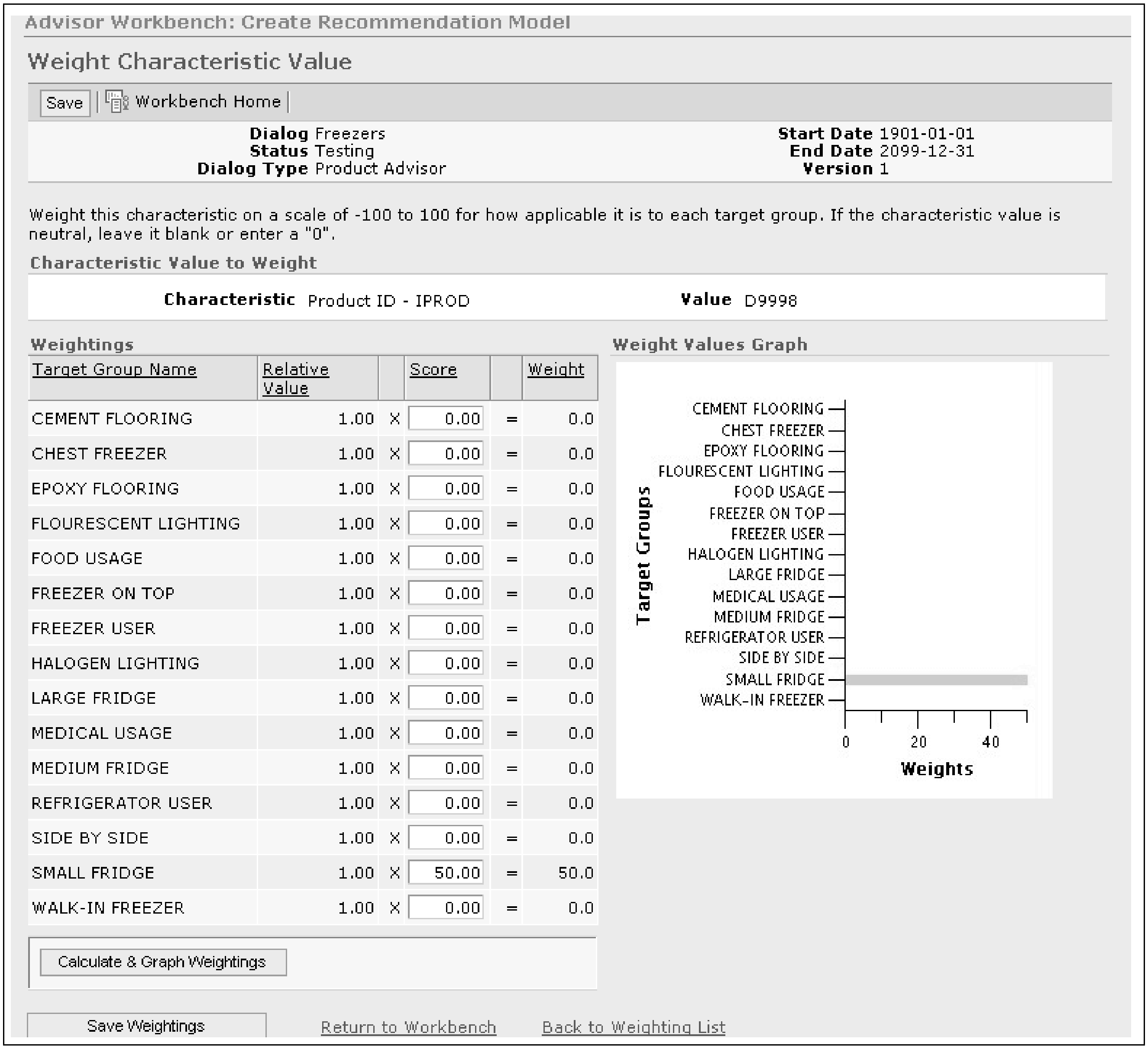
Graph Selected Values Select the characteristics that you want in the graph, and then click this button to view a visual representation of the selected characteristics. You can compare the weights of the values based on target groups. This is helpful for determining if all of the weights for a given target group makes sense.

Test Model Click to access the Test Recommendation Model page to verify and test the model.

See Chapter 4, "Setting Up PeopleSoft Real-Time Advisor Dialogs," Testing Recommendation Models, page 69.

Weighting Characteristic Values Against Target Groups

Access the Weight Characteristic Value page.



Advisor Workbench: Create Recommendation Model

Weight Characteristic Value

Save | Workbench Home |

Dialog Freezers
Status Testing
Dialog Type Product Advisor
Start Date 1901-01-01
End Date 2099-12-31
Version 1

Weight this characteristic on a scale of -100 to 100 for how applicable it is to each target group. If the characteristic value is neutral, leave it blank or enter a "0".

Characteristic Value to Weight

Characteristic Product ID - IPROD **Value** D9998

Weightings

Target Group Name	Relative Value		Score		Weight
CEMENT FLOORING	1.00	X	0.00	=	0.0
CHEST FREEZER	1.00	X	0.00	=	0.0
EPOXY FLOORING	1.00	X	0.00	=	0.0
FLOURESCENT LIGHTING	1.00	X	0.00	=	0.0
FOOD USAGE	1.00	X	0.00	=	0.0
FREEZER ON TOP	1.00	X	0.00	=	0.0
FREEZER USER	1.00	X	0.00	=	0.0
HALOGEN LIGHTING	1.00	X	0.00	=	0.0
LARGE FRIDGE	1.00	X	0.00	=	0.0
MEDICAL USAGE	1.00	X	0.00	=	0.0
MEDIUM FRIDGE	1.00	X	0.00	=	0.0
REFRIGERATOR USER	1.00	X	0.00	=	0.0
SIDE BY SIDE	1.00	X	0.00	=	0.0
SMALL FRIDGE	1.00	X	50.00	=	50.0
WALK-IN FREEZER	1.00	X	0.00	=	0.0

Calculate & Graph Weightings

Weight Values Graph

Save Weightings Return to Workbench Back to Weighting List

Weight Characteristic Value page

Use this page to weight a characteristic value on a scale of -100 to 100, based on how applicable objects with that characteristic value are for the target group. If the characteristic value is neutral, leave it blank or set it to zero. Weightings control what is recommended to the user.

Weightings

Target Group Name Lists the target groups that have been defined for the dialog.

Relative Value Lists the relative values that are derived from the target group. Relative values act as multipliers for weighting purposes.

Score Enter the score to apply to the target group. Score values on a scale of *-100* to *100,* depending upon how applicable the characteristic value is to the target group. Score characteristics by asking the following question: Will an object with this characteristic value be important to a user in this target group?

Weight Displays the relative score derived by multiplying the relative value by the score. This final value is used by the recommendation engine to determine recommendations for a target group.

A low weight number means that the characteristic value is not favorable to this target group, while a high relative number indicates that the characteristic value is favorable for this particular target group.

Calculate and Graph Weightings (Optional) Click to calculate the weight and populate the Weight Values Graph region.

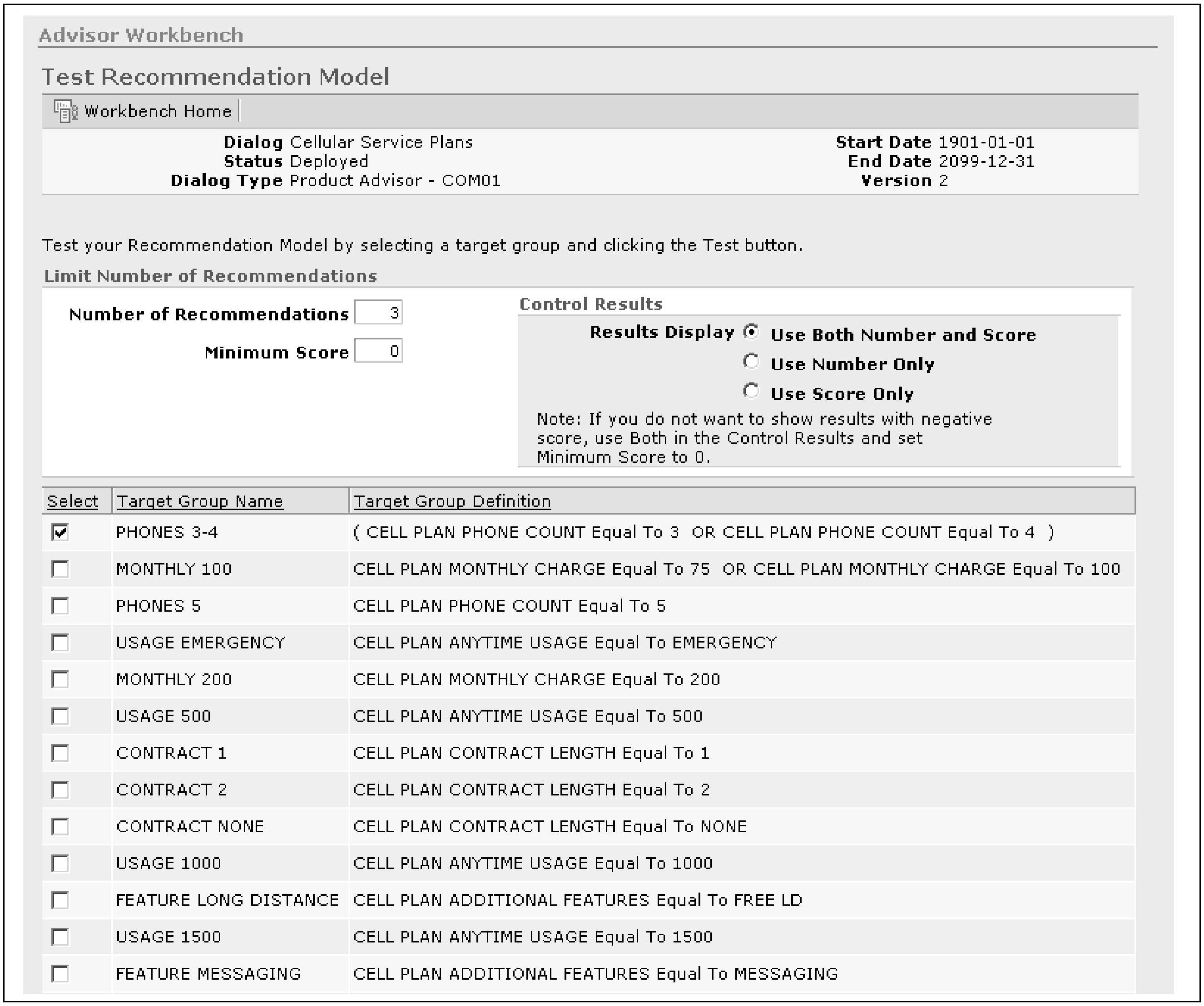
Note. This step is not mandatory, because PeopleSoft Real-Time Advisor calculates the weight internally.

Weight Values Graph Displays a visual representation of the weights for this value, per target group.

Save Weightings Click to save the data and return to the Create Recommendation Model page.

Testing Recommendation Models

Access the Test Recommendation Model page.



Advisor Workbench

Test Recommendation Model

Workbench Home

Dialog Cellular Service Plans
Status Deployed
Dialog Type Product Advisor - COM01

Start Date 1901-01-01
End Date 2099-12-31
Version 2

Test your Recommendation Model by selecting a target group and clicking the Test button.

Limit Number of Recommendations

Number of Recommendations 3

Minimum Score 0

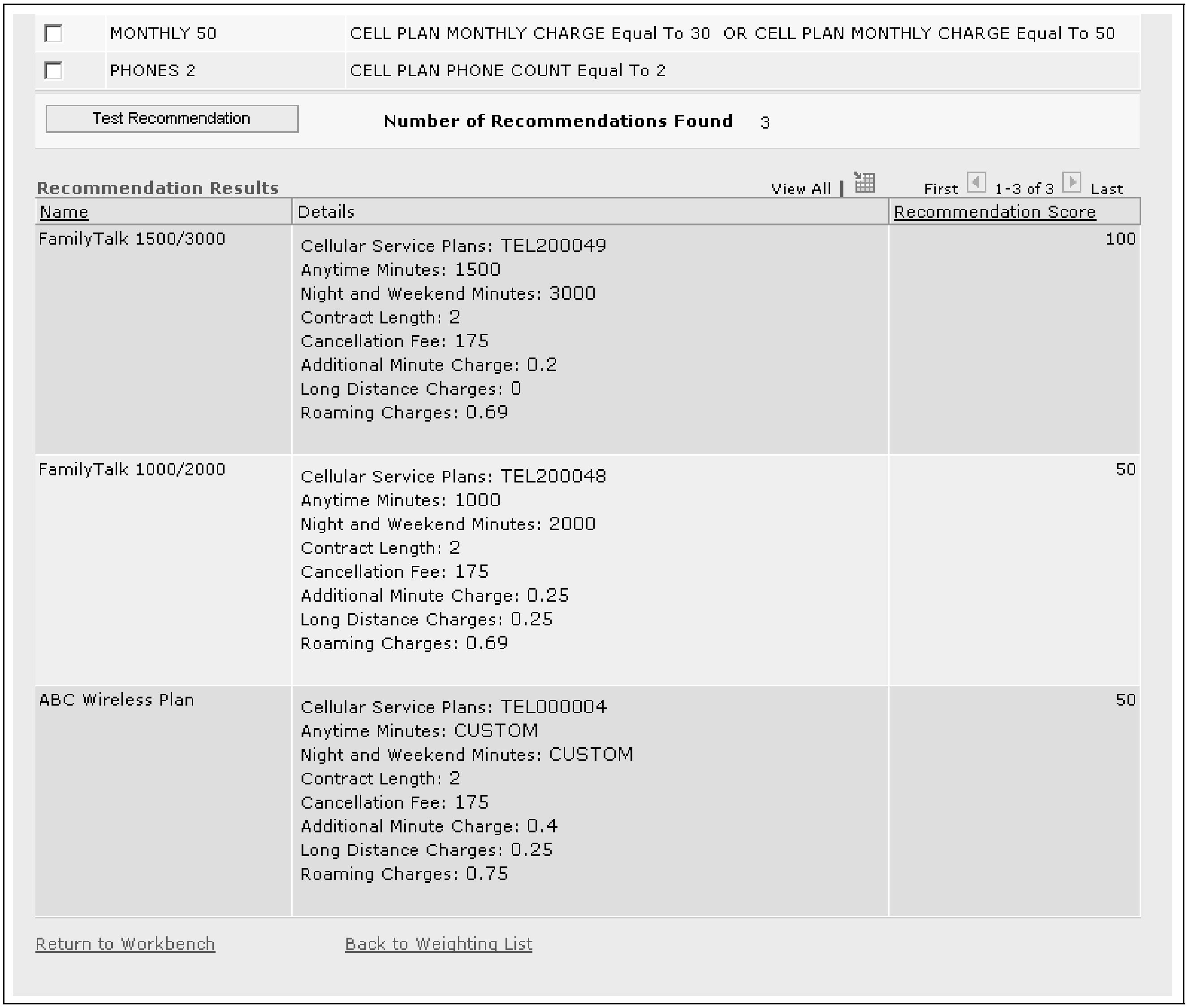
Control Results

Results Display (selected) **Use Both Number and Score**
Use Number Only
Use Score Only

Note: If you do not want to show results with negative score, use Both in the Control Results and set Minimum Score to 0.

Select	Target Group Name	Target Group Definition
☑	PHONES 3-4	(CELL PLAN PHONE COUNT Equal To 3 OR CELL PLAN PHONE COUNT Equal To 4)
☐	MONTHLY 100	CELL PLAN MONTHLY CHARGE Equal To 75 OR CELL PLAN MONTHLY CHARGE Equal To 100
☐	PHONES 5	CELL PLAN PHONE COUNT Equal To 5
☐	USAGE EMERGENCY	CELL PLAN ANYTIME USAGE Equal To EMERGENCY
☐	MONTHLY 200	CELL PLAN MONTHLY CHARGE Equal To 200
☐	USAGE 500	CELL PLAN ANYTIME USAGE Equal To 500
☐	CONTRACT 1	CELL PLAN CONTRACT LENGTH Equal To 1
☐	CONTRACT 2	CELL PLAN CONTRACT LENGTH Equal To 2
☐	CONTRACT NONE	CELL PLAN CONTRACT LENGTH Equal To NONE
☐	USAGE 1000	CELL PLAN ANYTIME USAGE Equal To 1000
☐	FEATURE LONG DISTANCE	CELL PLAN ADDITIONAL FEATURES Equal To FREE LD
☐	USAGE 1500	CELL PLAN ANYTIME USAGE Equal To 1500
☐	FEATURE MESSAGING	CELL PLAN ADDITIONAL FEATURES Equal To MESSAGING

Test Recommendation Model page (1 of 1)



☐	MONTHLY 50	CELL PLAN MONTHLY CHARGE Equal To 30 OR CELL PLAN MONTHLY CHARGE Equal To 50
☐	PHONES 2	CELL PLAN PHONE COUNT Equal To 2

Test Recommendation   **Number of Recommendations Found** 3

Recommendation Results   View All | First 1-3 of 3 Last

Name	Details	Recommendation Score
FamilyTalk 1500/3000	Cellular Service Plans: TEL200049 Anytime Minutes: 1500 Night and Weekend Minutes: 3000 Contract Length: 2 Cancellation Fee: 175 Additional Minute Charge: 0.2 Long Distance Charges: 0 Roaming Charges: 0.69	100
FamilyTalk 1000/2000	Cellular Service Plans: TEL200048 Anytime Minutes: 1000 Night and Weekend Minutes: 2000 Contract Length: 2 Cancellation Fee: 175 Additional Minute Charge: 0.25 Long Distance Charges: 0.25 Roaming Charges: 0.69	50
ABC Wireless Plan	Cellular Service Plans: TEL000004 Anytime Minutes: CUSTOM Night and Weekend Minutes: CUSTOM Contract Length: 2 Cancellation Fee: 175 Additional Minute Charge: 0.4 Long Distance Charges: 0.25 Roaming Charges: 0.75	50

Return to Workbench   Back to Weighting List

Test Recommendation Model page (2 of 2)

Select the target groups to use when testing the recommendation mode in order to ensure that the model is consistent and provides the recommendations that you expect based on the selected target groups. The recommendation model is automatically validated before testing. If the model contains inconsistencies, you cannot test it until the errors are fixed.

When you click the Test Recommendation button, the recommendation engine runs, and recommendation numbers are returned. This number represents the recommendations found based on the target groups chosen combined with the limiting factors. If there are recommendation results to show, a Recommendation Results table is filled.

Note. You must select at least one target group. Select multiple target groups to see recommendations that appear to a user who falls into multiple target groups.

Limit Number of Recommendations

Number of Recommendations	Enter the number of recommendations to return. Use this field with the Use Both Number and Score and Use Number Only filter options.

Note. If set to *0*, this value resets to *10* when you click the Test button.

Minimum Score

Enter the minimum score to return. Use this field with the Use Both Number and Score and Use Score Onlyfilter options.

Control Results

Use Both Number and Score, Use Number Only, and **Use Score Only**

Select options to filter results.

Test Recommendation

Click to run a test. The recommendation engine runs, and recommendation numbers are returned. This number represents the recommendations found based on the target groups chosen combined with the limiting factors. If there are recommendation results to show, a Recommendation Results table is filled.

Note. The maximum possible score is *99999*. Scores of greater than this amount are be set to *99999*.

Recommendation Results

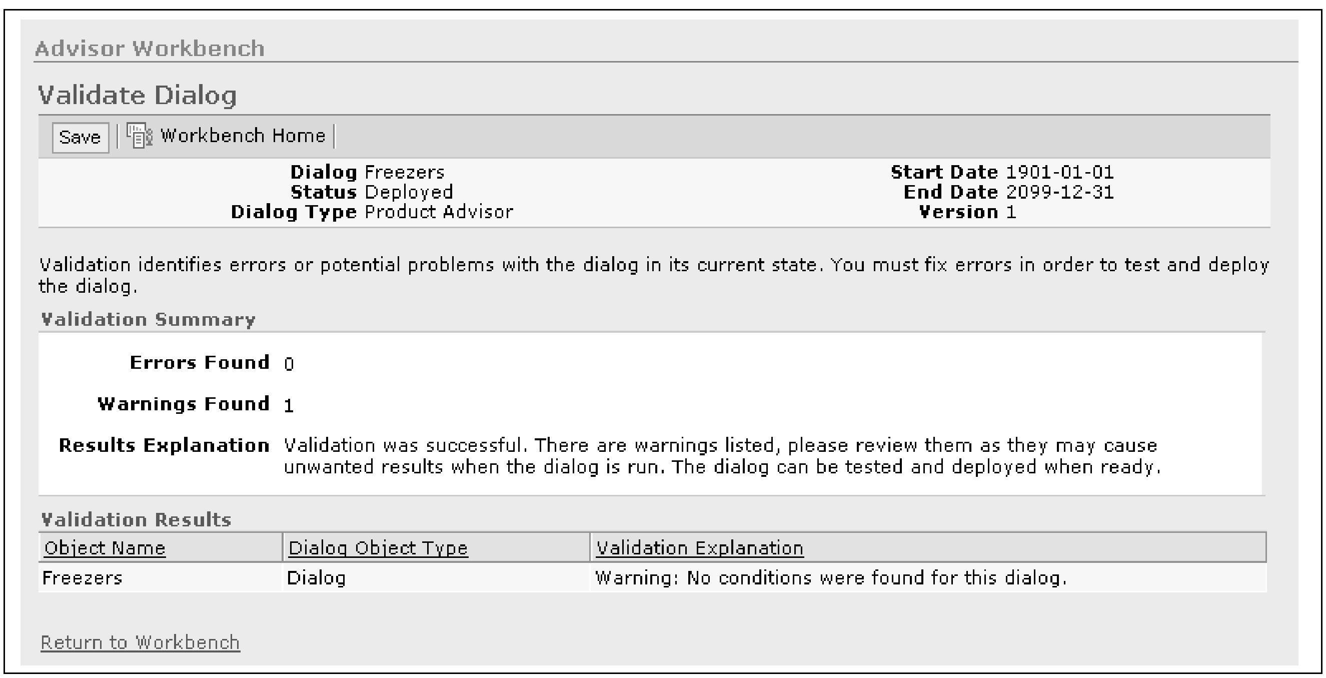
Once the Test Recommendation button has clicked, the recommendation result set will appear. These recommendations matched the criteria based on the target group selected and the recommendation model.

Recommendation Score

The maximum possible score is *99999*. Scores of greater than this amount are be set to *99999*.

Validating Dialogs

Access the Validate Dialog page.



Validate Dialog page

Validation identifies errors and potential problems with a dialog. If the validation is successful, the dialog is given a status of *Testing.* Once you are in this status, you can proceed to test and deploy the dialog.

Validation Summary

Errors Found Displays the number of errors found. Return to the Advisor Workbench page and fix all errors before testing the dialog.

Warnings Found Displays the number of warnings found. Fix any issues causing warnings to prevent undesirable results at runtime.

Results Explanation Explains the validation results, including errors or warnings.

Validation Results

Object Name Displays the object that contains the error.

Dialog Object Type Displays the type of object that contains the error, such as dialog, page, question, or target group.

Validation Explanation Explains the error.

Table of Errors and Fixes

The following table describes common errors and solutions:

Error or Warning	Solution
Error: No template defined for this dialog. Need to associate a template to the dialog.	There must be a display template associated with the dialog to provide PeopleSoft Real-Time Advisor with the look and feel for the dialog and the recommendation thresholds. To correct this error, associate a template with the dialog by using the Advisor Workbench main page.
Error: No pages were found for this dialog. Unable to continue with validation.	A valid interactive dialog must have pages to show the user. To fix this error, access the Layout Pages & Transitions page and create some pages. This error will only appear if the Layout Pages & Transitions page is a required step.
Warning: No pages were found for this dialog.	A valid interactive dialog must have pages to show the user. To fix this error, access the Layout Pages & Transitions page and create some pages. This warning will appear if the Layout Pages & Transitions page is a shown step.
Error (or Warning): No questions were found for this dialog.	A dialog must have questions associated with it if it is going to run in interactive mode. To fix this error, access the Select Questions page and select questions. Save the question list. If this page is not available to you and the dialog is going to be used to interactively converse with the user, the advisor type must be altered. Contact the PeopleSoft Real-Time Advisor setup administrator. This may show as a warning, if the Select Questions page is shown as opposed to being a required step.

Error or Warning	Solution
Error (or Warning): No conditions were found for this dialog.	A dialog may require conditions to be associated with the dialog. Conditions pull in external information to be used in the dialog for transitions and target groups. To fix this error, access the Select Conditions page. This may show up as a warning, if the Select Conditions page is shown as opposed to being a required step.
Error: No conditions or questions were found for this dialog.	A dialog must have either questions or conditions associated to it. Without either, the dialog will not be able to do anything, it cannot recommend or ask questions to gather information. Questions ask information from the user and conditions pull in external information. Both can be used in transitions and target groups. One or the other or possibly both are needed to create a dialog depending on the requirements of the dialog. To fix this error, either access the Select Questions page or access the Select Conditions page. If neither of these pages are not available to you, the advisor type must be altered. Contact the PeopleSoft Real-Time Advisor setup administrator.
Error: No starting page for the dialog.	A valid interactive dialog must have a starting page to show the user. To fix this error, access the Layout Pages & Transitions page and then edit the page that you want to use as the starting page. Select the Start Page check box and save the page.
Error: Page X is an end page, it cannot have a Next action.	End pages cannot have a Next action. To fix this error, access the Layout Pages & Transitions step and edit the indicated problem page. Either clear the Next action if this page is an end page, or clear the End Page check box if this is not an end page. Save the page.
Error: No default page to transition to on X page. There needs to be a default page to transfer to.	Pages with Next actions must have valid transitions. When the user clicks the Next button, the transitions for the page run. The default transition page is required. The default becomes the next page if none of the transitions are valid. To fix this error, access the Create Page Transitions page. Select a page in the As the default, go to Page field. Save the transitions.
Error: Page X, references a page, which was deleted from the dialog.	The page indicated in the error message is referencing a default transition page that has been deleted from the dialog. To fix this error, access the Create Page Transitions page. Set the As the default, go to Page field to a valid page. Save the transitions.
Error: Check the transitions for X page. One of the transitions for the page is missing a page to transfer to.	The page indicated in the error message is missing a go-to page reference in one of its transitions. To fix this error, access the Create Page Transitions page. Locate the transition that is missing a valid page in the If the conditions below are met, go to Page field. Select a page in this field. Save the transitions.

Error or Warning	Solution
Error: The expression used by a transition on page X is not valid. Please check the transitions to make sure the expressions used are valid.	The expression used by the page in one of its transitions is not valid. To fix this error, access the Create Page Transitions page. Click the Validate Syntax button; it should help you fix the transition by showing errors in the transition. Fix the errors and save the transitions.
Error: The expression used by a transition on page X, references a page, which was deleted from the dialog.	The page indicated in the error message is referencing a page in one of its transitions that has been deleted from the dialog. To fix this error, access the Create Page Transitions page. Locate the transition with the *(Invalid Value)* entry in the If the conditions below are met, go to Page field. Select a page in this field. Save the transitions.
Error: The expression used by a transition on page X, references question Y, which is no longer included in the dialog.	The page indicated in the error message is referencing a question in one of its transitions that has been removed from the dialog. You can add the question back to the dialog or modify the transition. To add the question back to the dialog, access the Select Questions page and add the question to the dialog. Save the question list. To modify the transition, access the Create Page Transitions page. Locate the transition that is referencing the question and modify the transition to delete the removed question. Save the transition.
Error: The expression used by a transition on page X, references condition Y, which is no longer included in the dialog.	The page indicated in the error message is referencing a condition in one of its transitions that has been deleted from the dialog. This should never happen, as you cannot delete a condition from Real-Time Advisor if it is used by either a transition or target group. However if it does happen, you can fix this by either updating the transition to no longer use the missing condition or (2) create a new condition and use it in the transition expression. To update the transition to no longer use the condition, option (1), access the Create Page Transitions page and locate the transition that is referencing the condition. Either delete or modify the transition; save the transition. To create a new condition, option (2), access the Select Conditions page and create a new condition. To update the transition to use the new condition, access the Create Page Transitions page. Locate the transition that is referencing the missing condition and use the new condition. Save the transition.
Error: No way to get off page X. There needs to an action that will move the dialog off this page. These actions include Back, Next, Start Over, or Exit.	A user must have a way to exit a page; actions that enable a user to exit a page include Back, Next, Start Over, and Exit. To fix this error, access the Create Page Transitions page. Select actions for the page. Save the page.
Error: Page X, references question Y, which is no longer included in the dialog.	The page indicated in the error message is referencing a question that has been removed from the dialog. You can add the question back to the dialog or edit the page and remove the question reference. To add the question back to the dialog, access the Select Questions page and add the question to the dialog. Save the question list. To remove the question reference, access the Create a Page page, remove the reference to the question from the Questions list, and save the page.

Error or Warning	Solution
Error: To create a recommendation model you must have all three steps - target groups, characteristics and the weighting model.	To make recommendations, you must be able to define target groups, add characteristics, and define the weighting model. To fix this error, you must update the advisor type used by the dialog to include all three steps. Contact the setup administrator.
Error: The template is missing the recommendation characteristics. These are used to determine what characteristics of the recommended object are displayed.	A template used by a dialog that is making recommendations must know the characteristics to show the user. To fix this problem, click the Choose Display Characteristics link on the Define Display Template page to edit the template used by the dialog. Use the Choose Display Characteristics page to select the advisor type used by the dialog. Add characteristics that should be displayed to the user when a recommendation is made. Select the appropriate check boxes and save the template.
Error: The template is missing the compare characteristics. These are used to determine what characteristics of the recommended object are displayed during comparisons.	A template used by a dialog that is allowing comparisons of recommendations must know what characteristics to show the user. To fix this problem, click the Choose Display Characteristics link on the Define Display Template page to edit the template used by the dialog. Use the Choose Display Characteristics page to select the advisor type used by the dialog. Add characteristics that should be displayed to the user when a recommendation is made. Select the appropriate check boxes and save the template.
Error: The template is missing the recommend detail characteristic. This is used to determine what characteristic is used as the name of the recommended object during recommendations.	A template used by a dialog that is making recommendations must know what detail characteristics to show the user. The detail characteristic is used as the title for the object. To fix this problem, click the Choose Display Characteristics link on the Define Display Template page to edit the template used by the dialog. Use the Choose Display Characteristics page to select the advisor type used by the dialog. Add characteristics that should be displayed to the user when a recommendation is made. Select the appropriate check boxes and save the template.
Error: The template is missing the compare detail characteristic. This is used to determine what characteristic is used as the name of the recommended object during comparisons.	A template used by a dialog that is allowing comparisons of the recommendations must know what detail characteristics to show the user. The detail characteristic is used as the title for the object. To fix this problem, click the Choose Display Characteristics link on the Define Display Template page to edit the template used by the dialog. Use the Choose Display Characteristics page to select the advisor type used by the dialog. Add characteristics that should be displayed to the user when a recommendation is made. Select the appropriate check boxes and save the template.
Error: Need to have valid target groups to create a recommendation model.	A dialog that includes recommendations must have target groups, characteristics, and the weighting model defined. To fix this error, access the Define Target Groups page and create target groups. Save the target groups.

Error or Warning	Solution
Error: Need to select characteristics to create a recommendation model.	A dialog that includes recommendations must have target groups, characteristics, and the weighting model defined. To fix this error, access the Selected Characteristics page and add characteristics to the model. Access the Select Characteristic Values page. These characteristics are distinguishing features of the recommendation objects and will be used later in the recommendation model. Save the characteristic values.
Error: Need weights to create a recommendation model.	A dialog that includes recommendations must have target groups, characteristics, and the weighting model defined. To fix this error, access the Create Recommendation Model page. Weight the target groups against the characteristics. Save the weights and test the model.
Error: Need target groups to create a recommendation model.	A dialog where recommendations are made must include valid target groups. To fix this error, access the Define Target Groups page and create target groups to be used in the model. Save the target groups.
Error: The expression used by the target group X is not valid. Please check the target group to make sure the expression used is valid.	The indicated target group is invalid. To fix this error, access the Define Target Groups page and edit the indicated problem target group. Click the Validate Syntax button; it should help determine the problem. Fix the problem and save the target group.
Error: Question X is used in the target group, but is not being used in the dialog.	For a question to be answered, it must be shown to the user on a page. The indicated question is referenced by the target group, but is never shown to the user. You can delete the target group or add the question to a page. To delete the target group, access the Define Target Groups page, find the indicated target group, and delete it. To add the question to a page, access the Create a Page page. Add the question by using the Add a Question button and selecting the question. Save the page.
Error: Target Group X, references question Y, which is no longer, included in the dialog.	The target group indicated in the error message is referencing a question that has been removed from the dialog. You can add the question back to the dialog or modify the target group. To add the question back to the dialog, access the Select Question page. To modify the target group, access the Define Target Groups page and edit the indicated problem target group. Locate the area of the target group that references the question and modify the target group to no longer reference the removed question. Save the target group.

Error or Warning	Solution
Error: Target group X, references condition Y which is no longer included in the dialog.	The target group indicated in the error message is referencing a condition that has been deleted from the dialog. This should never happen, as you cannot delete a condition from Real-Time Advisor if it is used by either a transition or target group. However if it does happen, you can fix this by either (1) updating the target group to not use the condition or (2) creating a new condition and use it, in the target group. To update the target group to not use the condition, option (1), access the Define Target Groups page and locate the target group that is referencing the condition. Modify the expression to no longer access the missing condition. Save the target group. To create a new condition, option (2), access the Select Conditions page and create a new condition. Save the condition. To update the target group, access the Define Target Groups page. Locate the target group that is referencing the missing condition and use the new condition. Save the target group.
Error: There is no default target group defined in the dialog.	There needs to be a default target group. To fix this error, access the Define Target Groups page and edit the target group to use as the default target group. Select the Default Target Group check box and save the target group.
Error: Advisor type used by the dialog is missing from the database.	The advisor type used by the dialog is missing from the database. Contact the setup administrator.
Warning: Today’s date is not within the start or end date for the dialog.	Today’s date must be within the dialog start and end dates to run. To correct the warning, edit the start or end dates on the Advisor Workbench page.
Warning: Page X is not referenced in the dialog. It is not the starting page, it is not referenced by any pages, or the referencing page does not have a Next button.	A page needs to be referenced by other pages for it to be displayed to the user. A page is referenced by either being the starting page or by being in a transition of another page. To fix this warning, determine where the indicated page should appear in the flow of the dialog. Then access the Create Page Transitions page and make the necessary edits to transitions to include the page in the dialog flow. Save the transitions. If you know the page is referenced, check the page where it is referenced and make sure the page has a Next action. Without a Next action, transitions are not used.
Warning: The question X is not being used in the dialog.	To fix this warning, remove the question from the dialog or add the question to a page. To remove the question from the dialog, access the Select Questions page and click Remove button next to the question to remove. Save the page. To fix this warning by adding the question to a page, access the Create a Page page, click the Add a Question button and select the question you want to add. Save the page.

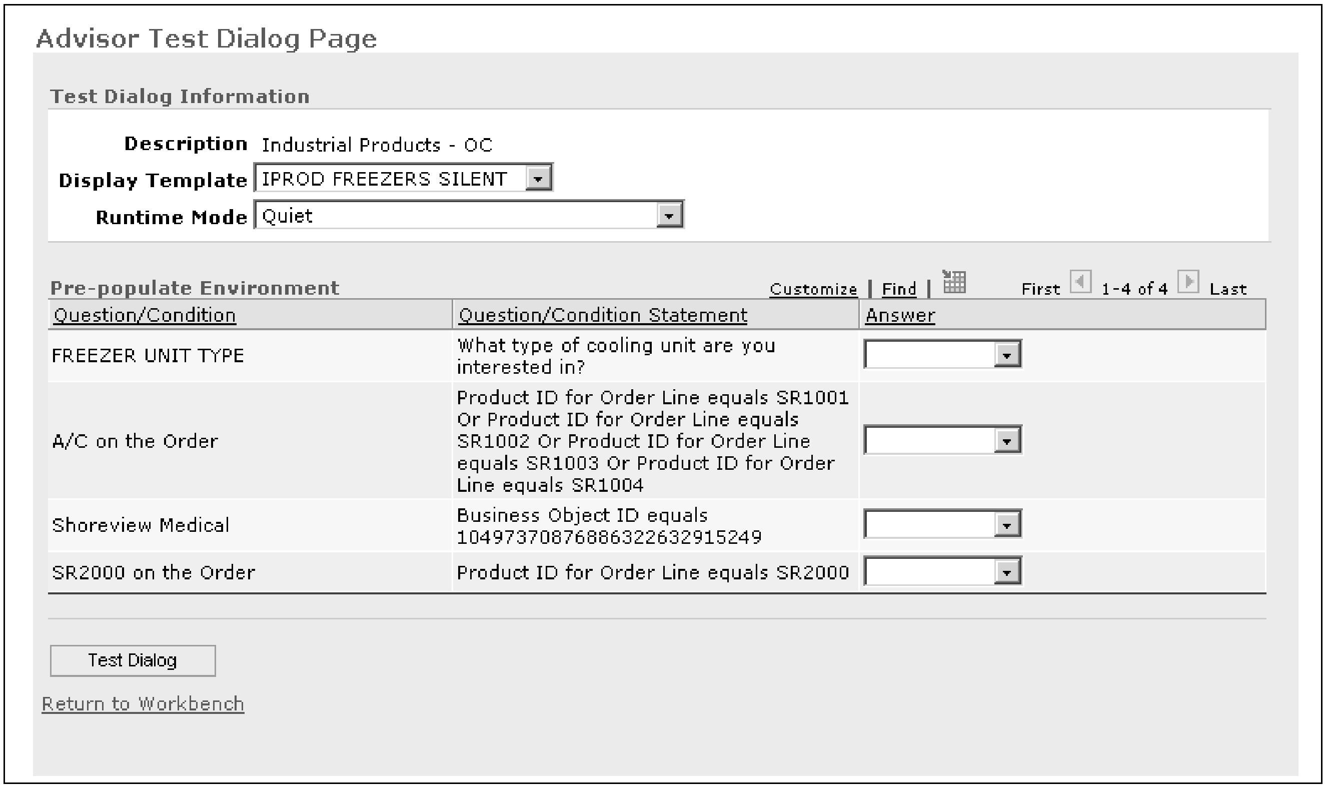
Error or Warning	Solution
Warning: The condition X is not being used in the dialog.	To fix this warning, remove the condition from the dialog or use the condition in a transition or a target group. To remove the condition from the dialog, access the Select Conditions page and click Remove button next to the condition to remove it. To fix this warning by adding the condition to a transition, access the Create Page Transitions page, and add the condition to the desired transition. Save the transition. To fix this warning by adding the condition to a target group, access the Define Target Groups page and locate the target group that you want to use the condition. Modify the target group to use the condition in an expression and save the target group.
Warning: The Advisor Type, X, used by this dialog does not have a drill class path associated with it. This class path used in conjunction with the class is used when the user asks for details on a recommended object.	The advisor type used by the dialog must have drill class information. This information is used when selecting a recommendation object, to enable the user to see details of the object. The advisor type needs to be edited and the drill class information added. Contact the setup administrator.

Testing Dialogs

Testing the dialog ensures that the dialog performs and flows the way you want it to. You can test the dialog in quiet or interactive mode. To test, the dialog must have a status of either *Deployed* or *Testing.*

Testing Dialogs in Quiet Mode

Access the Advisor Test Dialog page.



Advisor Test Dialog page

Select *Quiet* in the Runtime Mode field to test the dialog quietly.

Test Dialog Information

Display Template Select a template to use for the test. The template associated with the dialog is used as the default. An error may occur if the template selected does not contain adequate information for the dialog.

Runtime Mode Select quiet or interactive mode.

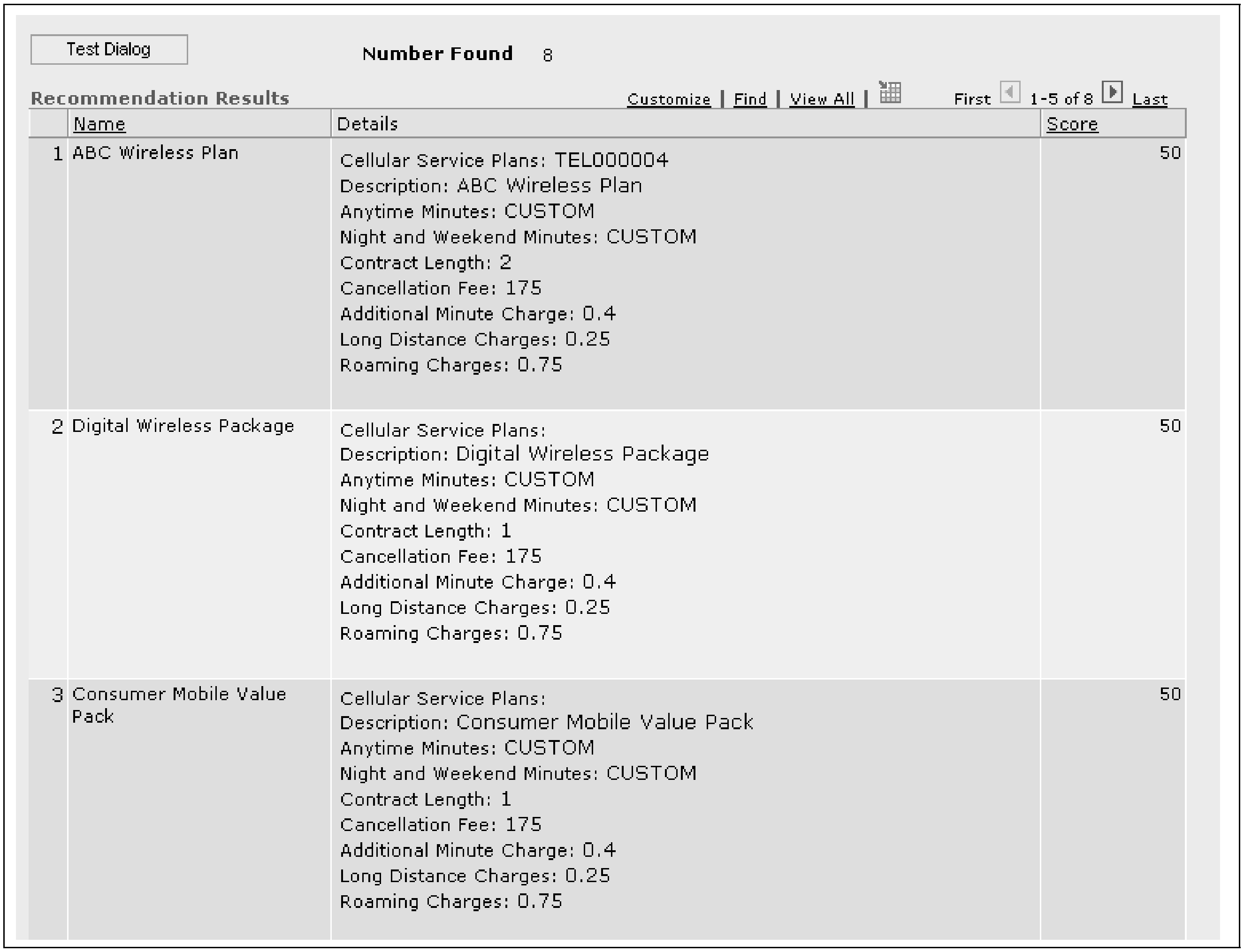
Pre-populate Environment

Question/Condition Displays the questions and conditions associated with this dialog. In Quiet mode questions and conditions are shown to pre-populate the environment.

Answer Select a possible answer to test the dialog.

Select Multiple Click to select multiple answers.

Test Dialog Click to preview what the dialog will look like. In Quiet mode the recommendation results will be shown.



Advisor Test Dialog (1 of 2): Quiet Mode Recommendation Results

Advisor Test Dialog (2 of 2): Quiet Mode Recommendation Results

Recommendation Results

This scroll area displays result details and the score value used by the recommendation engine to determine recommendations.

Testing Dialogs in Interactive Mode

Access the Advisor Test Dialog page.

Advisor Test Dialog page: Session Information

Select *Interactive* in the Runtime Mode field to test the dialog interactively. In Interactive mode the Real-Time Advisor runtime is invoked.

Note. While testing a dialog, you cannot use the Save action. The Save action is not a necessary part of dialog testing.

Session Information

This region contains debugging information.

Path Information Displays the path through the dialog, as seen at runtime, and shows the pages you were on previously.

Transition Information Displays a summary of why you are on the current page.

Transition Rules Displays the transition rules for the page, which determine the next page transition.

Target Group the User is in Based on the Question Answer Log Displays the target groups the user is in, based on answers given so far.

Question and Answer Log Displays the questions and answers provided by the user.

Saving Dialogs

After dialog testing is complete, deploy the dialog for the calling applications to use, by selecting the Deployed check box on the Advisor Workbench page, and click the Save Dialog button.

Only deployed dialogs are seen by the calling applications and end users.

Maintaining Dialog Versions

This section provides an overview of versions and discusses how to:

- Maintain dialog versions.
- Clone a version of any dialog.

Understanding Versions

Once a dialog is deployed, a new version must be created to make changes to the dialog. Changes cannot be made directly to a deployed dialog. The Advisor Workbench tool will create a new version when appropriate.

The Dialog Versions page is available from the Advisor Workbench tool or from the menu. From this page, you can see all versions of a dialog. You can edit the latest version, either the edit in progress version or the deployed version if there is no in-progress version. You can clone or view past deployed versions. You can delete the in-progress version.

Only one version of any dialog can be deployed at a time. If a new version of the dialog is deployed, the old deployed version is no longer deployed or available to run. The old deployed version is given the new status of *Past Deployed.* If a new version is about to be created, you are notified before the change is saved so that you can cancel the operation.

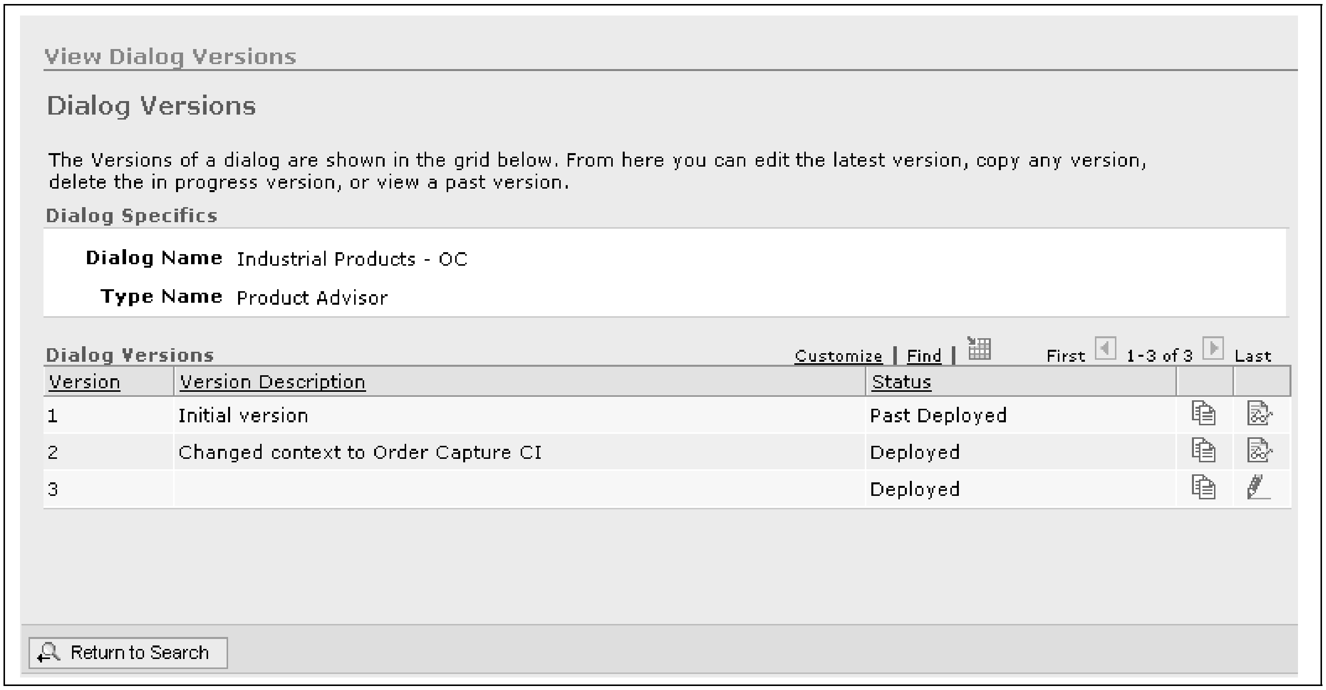
Cloning a dialog does not copy all the versions of the dialog, only the loaded version. The dialog name must change when a dialog is cloned, the status is set to *Edit In Progress,* and the version number is set to *1.*

Pages Used to Maintain Versions

Page Name	Object Name	Navigation	Usage
Dialog Versions	RAD_ADVISOR_VER	Marketing, Advisor Dialogs, Dialog Versions	Edit the latest version of a dialog, copy any version, delete the edit in-progress version, or view a past version.
Clone Dialog	RAD_DLGCLONE	Click the Clone Dialog Version button on the Dialog Versions page.	Make a copy of the selected dialog version.

Working with Dialog Versions

Access the Dialog Versions page.



Dialog Versions page

Dialog Versions

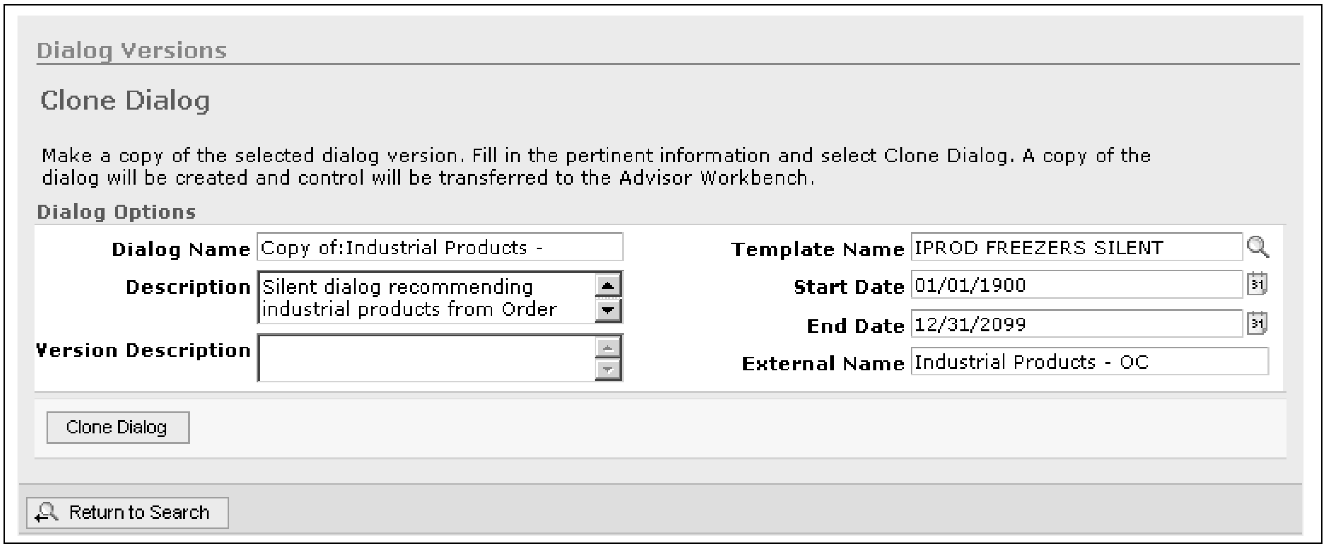
Click to make a copy of the dialog version.

Click to view a past deployed version of the dialog in the Advisor Workbench tool.

Click to edit the latest version, either the edit in-progress version or the deployed version if there is no in-progress version.

Cloning Dialogs

Access the Clone Dialog page.



Clone Dialog page

Clone Dialog

Dialog Name Enter a name for the new dialog. This name should be unique.

Template Name Select a display template. Default will be the display template of the dialog version being copied.

Start Date Enter a date that the dialog becomes valid.

End Date Enter a date that the dialog becomes invalid.

External Name Assign a dialog name that is viewable to the end user. This name can be shown to the end user during runtime.

Clone Dialog Click to clone the dialog.

Transfer to Cloned Dialog After the dialog version has been cloned this link will appear. Click to transfer to the Advisor Workbench tool.

CHAPTER 5

Defining Display Templates

This chapter provides an overview of the recommendation experience and discusses how to:

- Define display templates.
- Use PeopleSoft Real-Time Advisor.

Note. This chapter is written to give the dialog creator a sense of the runtime recommendation experience. The focus of this chapter is to provide a better understanding of how the display templates, as well as the decisions made while using the Advisor Workbench tool, translate into the runtime experience.

Understanding the Recommendation Experience

PeopleSoft Real-Time Advisor integrates directly with several other PeopleSoft applications when users want to buy or configure a recommended object. PeopleSoft Real-Time Advisor can be invoked directly from PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, PeopleSoft Mobile Order Capture, PeopleSoft CRM Catalog, PeopleSoft CRM industry-specific solutions that rely upon order-entry functionality, or the CRM catalog.

With the addition of the (AAF) active analytic framework , PeopleSoft Real-Time Advisor can also be indirectly invoked from PeopleSoft Support and HelpDesk cases, the 360-degree view, and PeopleSoft Marketing waves through AAF Actions.

The PeopleSoft Real-Time Advisor recommendation experience connects dialog creation with user presentation. It can be a quiet session that uses information already known about a user to generate recommendations, or it can be an interactive session where the user is asked a series of questions in order to gather information. Each page that is presented to a user contains elements such as questions and answers, explanations, recommendations, and actions. Depending on the action type, either the action itself or transition rules determine the subsequent page. PeopleSoft Real-Time Advisor segments users based on their responses to questions and conditions, and places them in target groups which determine what aspects of the recommended product they are most likely to favor. If a user is not part of a target group and a recommendation is requested, the default target group is passed into the recommendation engine. Display controls enable a dialog creator to successfully define a varied and relevant set of display templates to influence the user experience.

Style Class Definitions

Style classes enable you to change the appearance of HTML objects. They can control the colors, font, and display size of HTML objects. PeopleSoft Real-Time Advisor leverages style class definitions to control how dialog pages look. You create style classes in PeopleSoft Application Designer. The more style classes that you create prior to creating PeopleSoft Real-Time Advisor display templates the better, as this provides a plentiful array of materials to use when designing runtime pages.

The Advisor Workbench Test Dialog functionality (using Interactive mode) can be used to test the style classes and display templates to ensure you are getting the desired display appearance.

Action Handling

Several actions are available at runtime. Actions appear on the page at runtime. These action types are defined while preparing the PeopleSoft Real-Time Advisor environment:

- Next: Uses transition rules to determine the next page.
- Back: Sets up the next page to be the one that was previous to the current page.

  All user answers to the questions on that page are represented. The current page is removed from the path guide.
- Exit: Returns users to the application that called the PeopleSoft Advisor dialog.
- Save: Saves the current PeopleSoft Real-Time Advisor session.

  If you have saved during the session, PeopleSoft Real-Time Advisor provides the calling application with a session identifier that is used to restore the session information at a later time.
- Start Over: Restarts the dialog session, completely erasing the current session, including all of the user's answers, and restarts the session.
- Recommend: Sets up the next page to be the Recommendation page and requests a set of recommendations from the engine based on the user's answers and conditions.
- View Answers: Lists all of the dialog pages with questions and answers.

  Users can go back to a page and change their answers. If a user selects one of the pages to edit, the path guide is updated. The recommendation process continues from this page, using the transitions of the page and the action designated by the user.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer

Chapter 3, "Preparing the PeopleSoft Real-Time Advisor Environment," Defining Actions, page 10

Defining Display Templates

This section provides an overview of display templates and discusses how to:

- Define display templates.
- Define page controls.
- Define recommendation controls.
- Define compare controls.
- Define view answer controls.
- Associate display characteristics to the template.
- Clone the current template.

Understanding Display Templates

Display templates control the look of the runtime pages. Templates also dictate the information that appears for the recommended objects. Even quiet dialogs need display templates, since this is where several key controls are defined, such as the recommendation thresholds and the display characteristics. Presentation according to templates enables the interface to change by dialog or by page, depending on the dialog and page settings, and requires no coding by the user setting up the dialog. Templates can control these five areas of the interactive experience:

- Overall user interface.
- Questions and answer pages.
- Recommendation page.
- Comparison page.
- View the Answers page.

Page Controls

Page controls are derived based on how the questions and explanations are presented to users during the runtime of the dialog. These pages are the majority of what users will view; therefore, page controls are important, because you can use them to create a custom look for either the dialog or the page depending on the dialog setup.

By adding a display template to the page with the Advisor Workbench tool, you can override the dialog template with a page template. You may want to take advantage of this functionality if you want a specific question and answer page to differ from the general look of the dialog.

See Chapter 4, “Setting Up PeopleSoft Real-Time Advisor Dialogs,” Creating Pages, page 53.

Display Characteristics

Display characteristics determine the aspects of the recommended object that are shown to the user. Because templates can be used across multiple advisor types, and each advisor type has a different set of characteristics associated with it, you can select the characteristics to show per advisor type. Therefore, you can create a look through the template and use that template for many different dialog types.

The recommendation engine only works with characteristic keys of an object. The template determines the information regarding the object that is valuable to show users. For example, when the dialog recommends products, the dialog uses the setID and product ID to indicate which product to recommend. However, you may want to show the product description as well. You can map the description as a display characteristic and add it to the recommendation grid; the description is then shown to the user as relevant information about the product. This same functionality can be applied to any display-type characteristic. You can also determine what characteristic to show as a link. Links can transfer users to the product details in an application such as the CRM catalog.

Note. The characteristic mappings for display characteristics and what happens when a link is selected must be defined while preparing the PeopleSoft Real-Time Advisor environment.

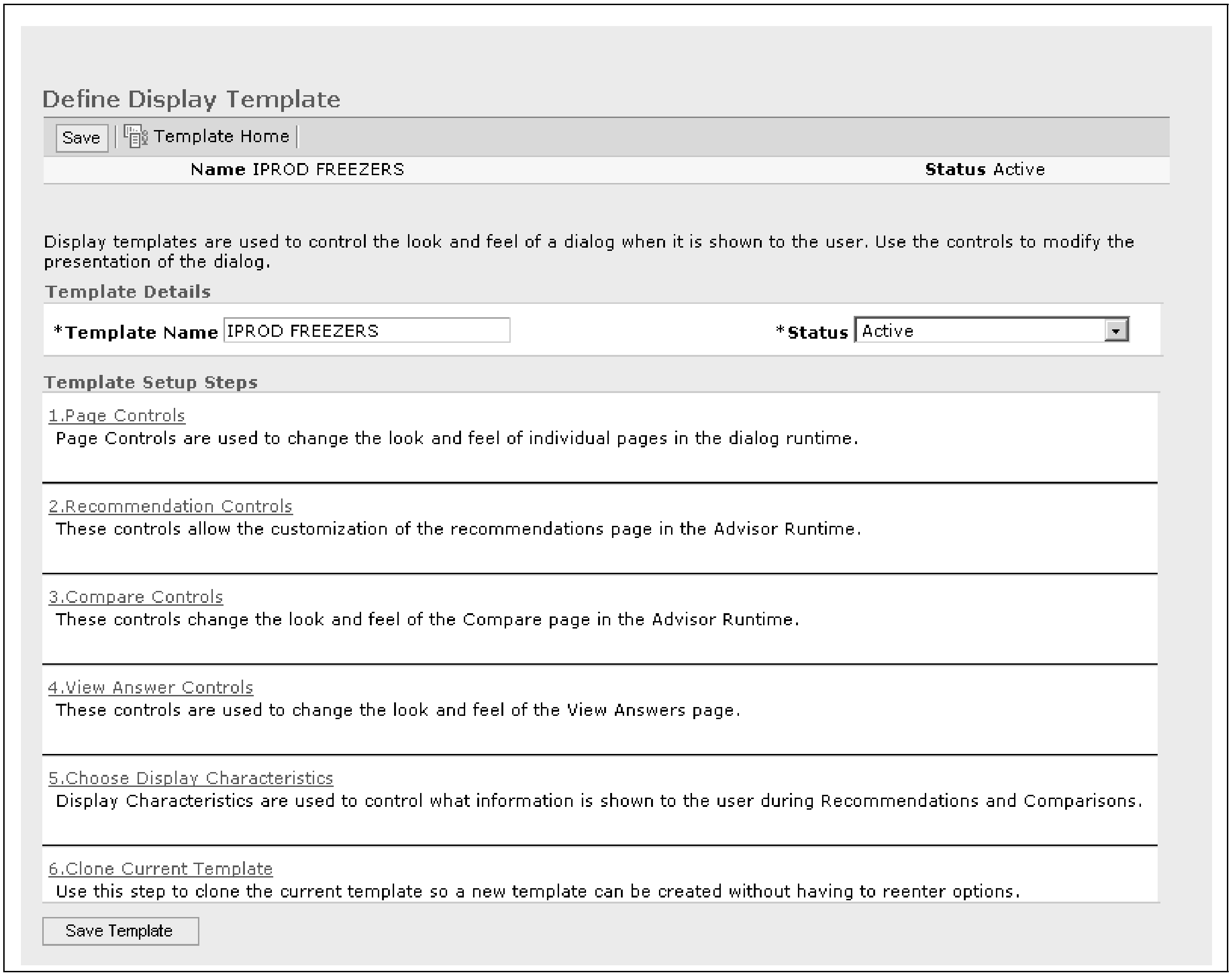
See Chapter 3, “Preparing the PeopleSoft Real-Time Advisor Environment,” Defining Characteristic Mapping, page 18.

Pages Used to Define Display Templates

Page Name	Object Name	Navigation	Usage
Define Display Template	RAD_TEMPLATE	Marketing, Advisor Dialogs, Define Display Template	Define display templates that control the look of the dialog presentation.
Define Page Controls	RAD_TMPL_PAGE	Click the Page Controls link on the Define Display Template page.	Define page control options to change the look of the individual question and answer pages at runtime.
Define Recommendation Controls	RAD_TMPL_RECOM	Click the Recommendation Controls link on the Define Display Template page.	Define recommendation controls to configure the way in which the system presents recommendations and the thresholds used to generate the recommendations.
Define Compare Controls	RAD_TMPL_COMP	Click the Compare Controls link on the Define Display Template page.	Define compare controls to change the look and feel of the comparison page. At runtime, you can use this page to view compared recommendations.
Define View Answer Controls	RAD_TMPL_VIEWANS	Click the View Answer Controls link on the Define Display Template page.	Define the view answer controls to change the look of the View Answers page. At runtime, you can view or edit previous answers to questions on this page.
Choose Display Characteristics	RAD_TMPL_CHARA	Click the Choose Display Characteristics link on the Define Display Template page.	Choose the display characteristics for the recommendation and comparison pages.
Clone Current Template	RAD_TMPL_CLONE	Click the Clone Current Template link on the Define Display Template page.	Clone the current template so a new template can be created without having to reenter options.

Defining Display Templates

Access the Define Display Template page.



Define Display Template page

Template Details

Status Select either *Active* or *Inactive.* Only active templates are available to be used in the Advisor Workbench tool when creating a dialog.

Template Setup Steps

Page Controls Click to set up page controls for question and answer pages, including page control preferences, path guide options, and style classes.

Recommendation Controls Click to access the Define Recommendation Controls page and define recommendation control options, recommendation options, style classes, and score display details. At runtime, this information is used to display recommendations. This step must be done even for dialogs that will only run in quiet mode, since this step determines the recommendation thresholds.

Compare Controls Click to access the Define Compare Controls page and change the look of the Compare Selected page. At runtime, users use the Compare Selected page to compare recommendations returned by PeopleSoft Real-Time Advisor.

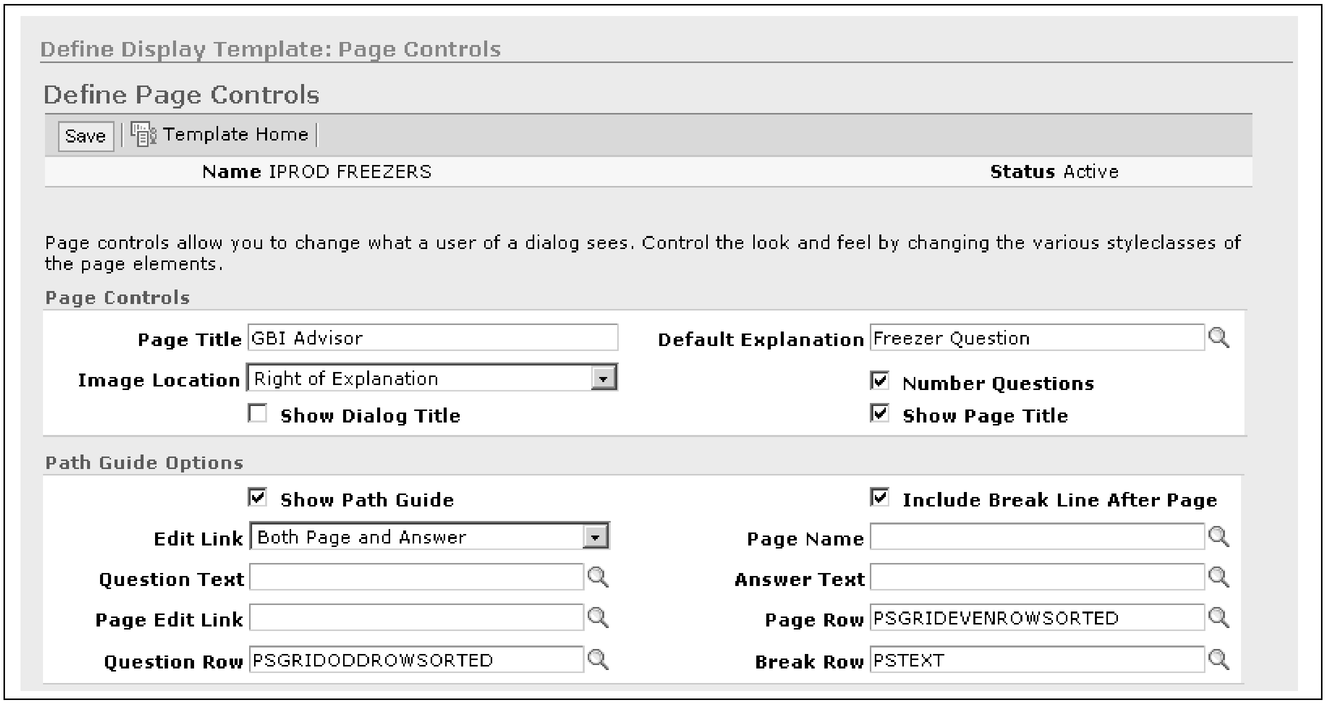
View Answer Controls Click to access the Define View Answer Controls page and change the look of the View Answers page. At runtime, users can view or edit previous answers on the View Answers page.

Choose Display Characteristics Click to control what display characteristics are shown to users with regard to recommendations and comparisons. This step must be done even for dialogs that will only run in quiet mode, since this step determines the characteristics returned with the recommendation.

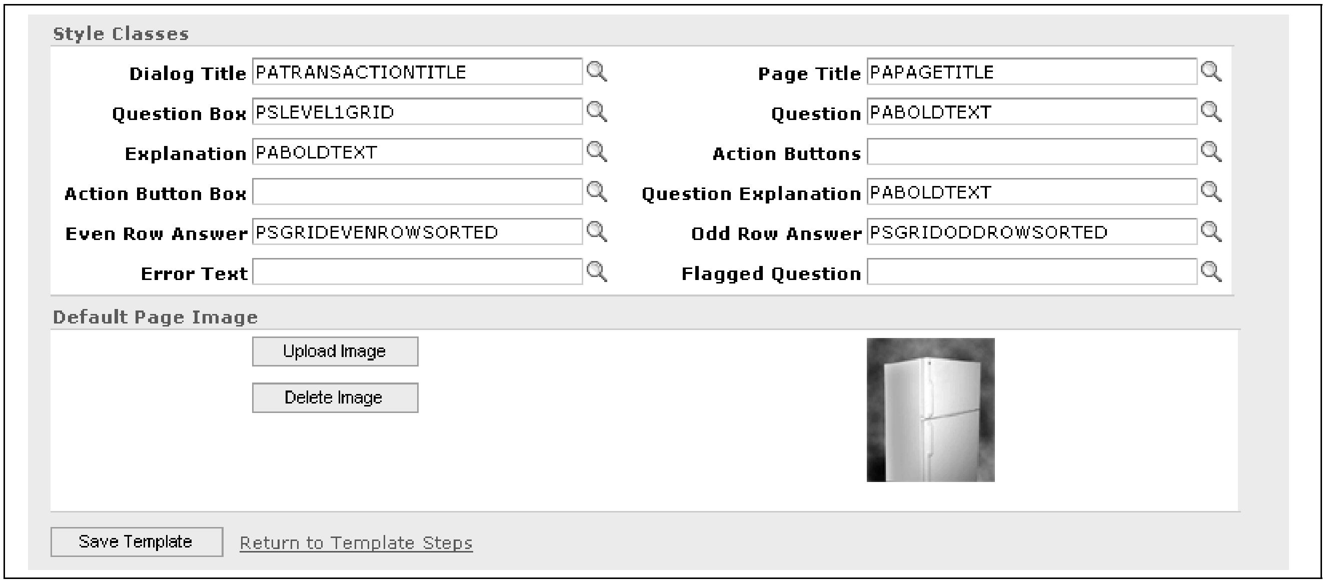
Clone Current Template Click to clone the current template to create a new template without reentering options.

Defining Page Controls

Access the Define Page Controls page.



Define Page Controls page (1 of 2)



Define Page Controls page (2 of 2)

Page Controls

Page Title

If the page does not have navigation text (as defined in the Advisor Workbench tool), the text entered here will be shown by default. There is a 30-character limit.

Default Explanation

Enter a default explanation to use if none is associated for a given page.

Number Questions

Select to number the questions sequentially for this page only.

Show Dialog Title

Select to display the dialog title on the page. The dialog title is the navigation text defined for the dialog.

Show Page Title

Select to display the Page Title field for this page. If selected, either the page navigation text or the page title appears on the page.

Path Guide Options

Show Path Guide

Select to display the path guide on the upper right-hand corner of this page. You can view the names of all of the completed pages, as well as all of the questions and answers from the previous page.

Include Break Line After Page

Select to provide a break row between each page listed in the path guide, using style classes.

Edit Link

Select the type of edit link that enables users to go back and edit answers on specific pages.

Values are:

- *Answer Only*
- *Both Page and Answer*
- *Neither Page nor Answer*
- *Page Only*

Page Name	Enter a style class for the page name in the path guide. The page name that appears is either the navigation text of the page or the page title.
Question Text	Enter a style class for the question text in the path guide. The question text that appears is the navigation text for the question.
Answer Text	Enter a style class for the answer text in the path guide. The answer text that appears is the navigation text for the answer.
Page Edit Link	Enter a style class for the edit link of a page in the path guide.
Page Row	Enter a style class for a page row in the path guide.
Question Row	Enter a style class for the question row in the path guide.
Break Row	Enter a style class for a break row in the path guide. Use this row if you select Include Break Line After Page.

Style classes

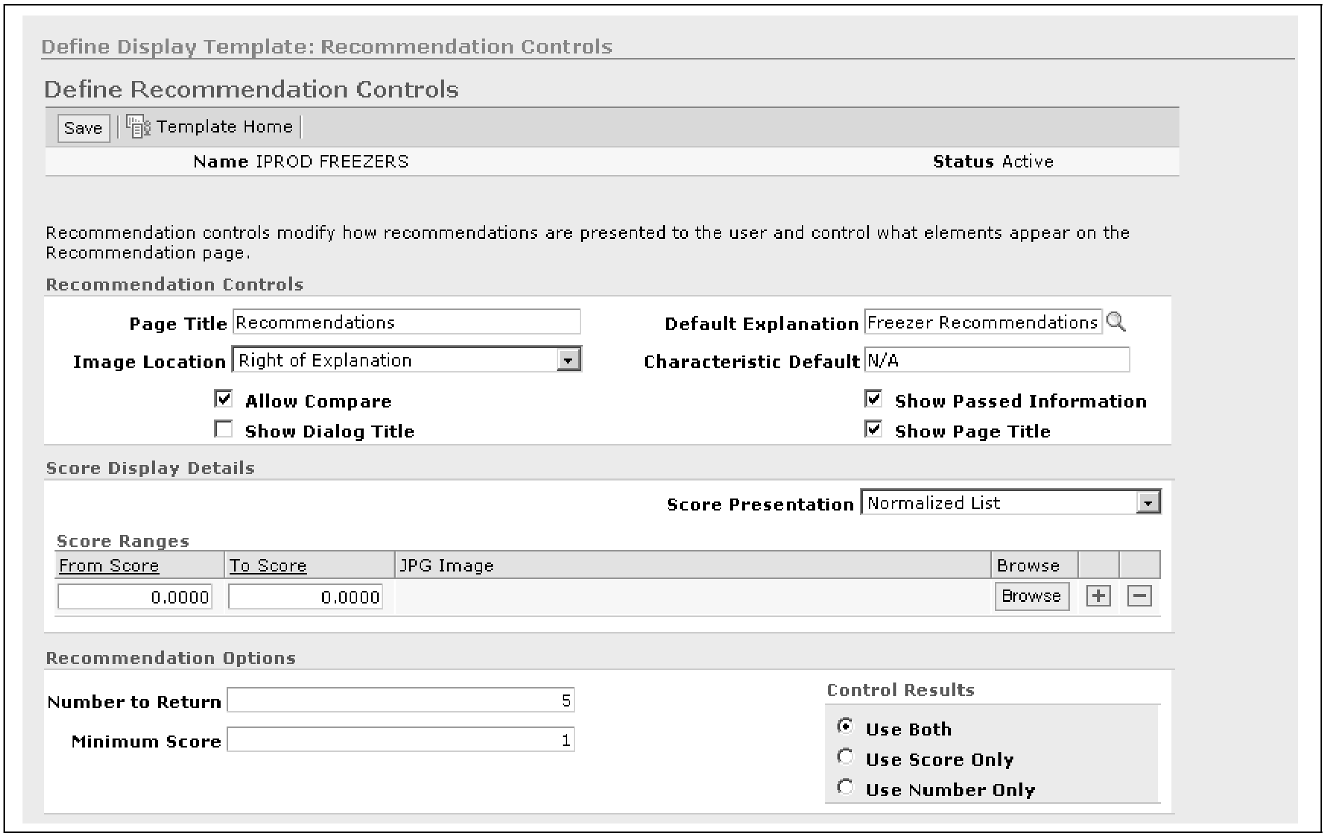
Dialog Title	Enter a style class for the title of the dialog, if used.
Page Title	Enter a style class for the page title, if used.
Question Box	Enter a style class for the question box. This is the framed box that surrounds the question and answers on the page.
Question	Enter a style class for the questions.
Explanation	Enter a style class for the explanation text.
Action Buttons	Enter a style class for action buttons.
Action Button Box	Enter a style class for the framed box that surrounds actions in the runtime.
Question Explanation	Enter a style class for text explanations for questions.
Even Row Answer	Enter a style class for even row answers for both single-type or multiple-type answers.
Odd Row Answer	Select a style class for odd row answers for both single-type or multiple-type answers.
Error Text	Select a style class for the error text.
Flagged Question	Select a style class for the color of the text when a question is flagged because it is required.

Default Page Image

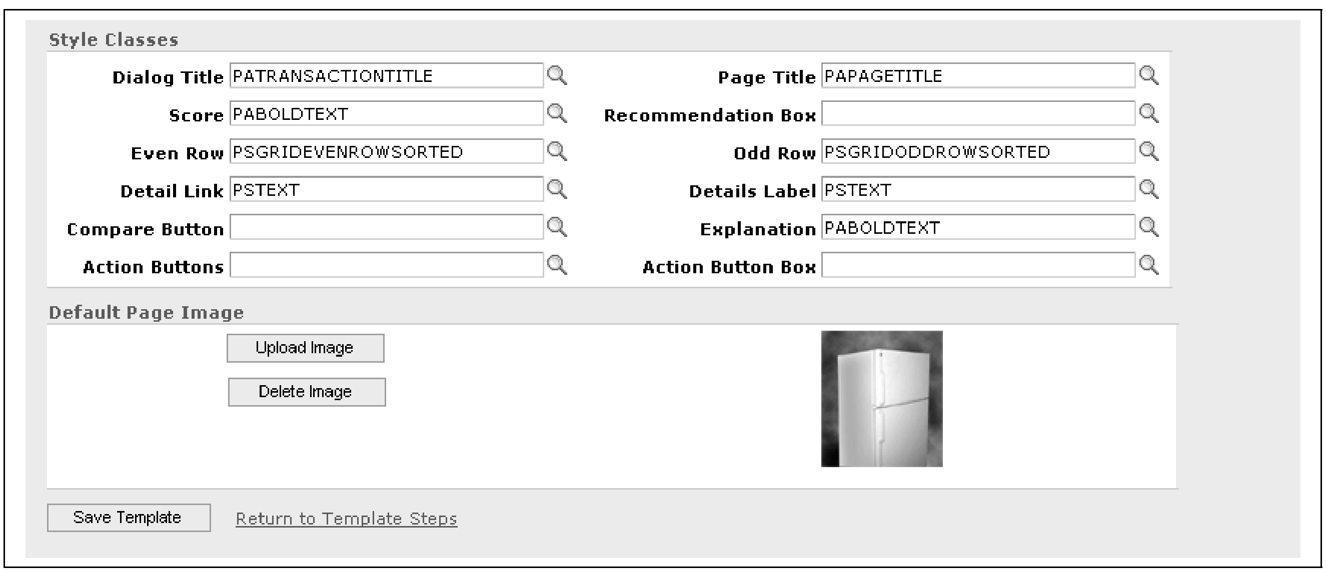
Upload Image	Select an image to use on a page.
Delete Image	Delete the image that is being used on the page.

Defining Recommendation Controls

Access the Define Recommendation Controls page.



Define Recommendation Controls page (1 of 2)



Define Recommendation Controls page (2 of 2)

Recommendation Controls

Page Title — Enter the page title to use for recommendation pages. There is a 75-character limit.

Default Explanation — Enter a default explanation to use for the Recommendation page.

Image Location Select where to place the image. Values are: *Right of Explanation* and *Left of Explanation.*

Characteristic Default Enter a value to specify what an empty characteristic shows, if the characteristic value for the recommended object is empty. Use something apparent like *NA* or *-*.

Allow Compare Select to enable users to compare recommended objects.

Show Passed Information At runtime, the calling application may provide PeopleSoft Real-Time Advisor additional display information about the recommended objects that does not appear in the database. Select this check box to allow this information to appear in PeopleSoft Real-Time Advisor when the object is recommended. For instance, the calculated price may be the passed information.

Show Dialog Title Select to display the dialog title on the page. The dialog title that appears is the navigation text of the dialog.

Show Page Title Select to display the Page Title field.

Score Display Details

Score Presentation Select a score presentation. Values are: *Image Range, Normalized List*(out of 100), *Ranking,* or *Raw Score.*

Note. A normalized list takes the highest score to 100 and the lowest score to zero. All of the other scores are then adjusted accordingly. A ranking ranks the score, and the raw score is the score as it is calculated by the recommendation engine.

From Score and **To Score** Enter a score to determine the raw score range for this image.

JPG Image Displays the image if a recommended objects score falls within the designated range.

Browse Click to obtain the image for the range.

Note. If there are recommendations whose raw scores do not fall within any of the defined image ranges, the score image for that recommend object is empty.

Score Range information is only used if the Score Presentation is set to Image Range.

Recommendation Options

Number to Return Enter the number of recommendations to present on the Recommendation page. This entry is required for dialogs run in Quiet mode too.

Minimum Score Enter a number to filter recommendations under a certain raw score. For instance, you may only want recommendations with at least a 50 score. This entry is required for dialogs run in Quiet mode too.

Control Results

Use Both Select to use both the number of recommendations and the minimum score to determine the number of recommendations that appear on the Recommendation page.

Use Score Only Select to use only the score as the limiting factor to determine the number of recommendations shown on the Recommendation page.

Use Number Only Select to use only the number of recommendations as the limiting factor to determine the number of recommendations shown on the Recommendation page.

Note. Control results, Number to Return, and Minimum Score are used by quiet dialogs.

Style classes

Dialog Title Enter a style class for the dialog title, if used.

Page Title Enter a style class for the page title, if used.

Score Enter a style class for the score display column in the recommendation control. This style class is not used when the Image Range option is selected.

Recommendation Box Enter a style class to use for the framed box around the list of recommendations.

Even Row Enter a style class for even row recommendations in the recommendations control.

Odd Row Enter a style class for odd row recommendations in the recommendations control.

Detail Link Enter a style class for the details link column in the recommendation control.

Details Label Enter a style class for the details label column in the recommendation control.

Compare Button Enter a style class for the Compare button.

Explanation Enter a style class for the explanation text.

Action Buttons Enter a style class for the action buttons.

Action Buttons Box Enter a style class for the framed box that surrounds actions in the runtime.

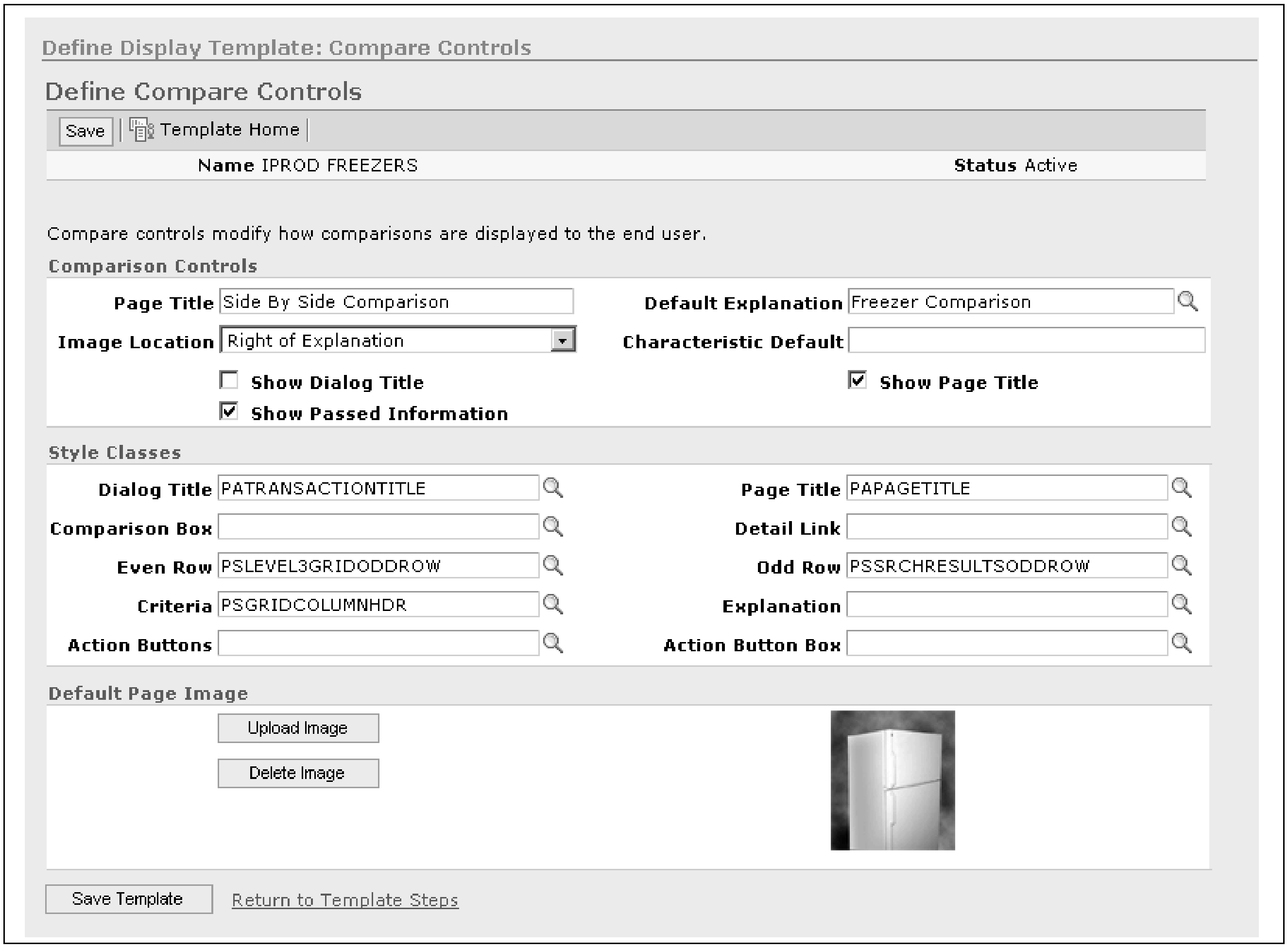
Default Page Image

Upload Image Click to select the default image to use on the Recommendation page.

Delete Image Click to delete the default image that is being used on the Recommendation page.

Defining Compare Controls

Access the Define Compare Controls page.



Define Compare Controls page

Comparison Controls

Page Title Enter the page title that is to be used for comparison pages. There is a 75-character limit.

Default Explanation Enter a default explanation to use for the comparison page.

Image Location Select where to place the image. Values are: *Right of Explanation* and *Left of Explanation.*

Characteristic Default Enter a value to specify what an empty characteristic shows, if the characteristic value for the recommended object is empty. Use something apparent like *NA* or *-*.

Show Dialog Title Select to display the dialog title on the page. The dialog title that appears is the navigation text of the dialog.

Show Page Title Select to display the Page Title field.

Show Passed Information At runtime, the calling application may provide PeopleSoft Real-Time Advisor additional display information about the recommended objects that does not appear in the database. Select this check box to allow this information to appear in PeopleSoft Real-Time Advisor when the object is recommended. For instance, the calculated price may be the passed information.

Style classes

Dialog Title Enter a style class for the dialog title, if used.

Page Title Enter a style class for the page title, if used.

Comparison Box Enter the style class that applies to the box surrounding the compared objects grid.

Detail Link Enter a style class for the details link column in the compare control.

Even Row Enter a style class to use for even row comparisons in the compare control.

Odd Row Enter a style class to use for odd row comparisons in the compare control.

Criteria Enter the style class that applies to the first column of the comparison grid where the various aspects of the object are listed. The criterion might be the price of a product.

Explanation Enter a style class for the Explanation button.

Action Buttons Enter a style class for the action buttons.

Action Button Box Enter a style class for the framed box that surrounds actions in the runtime.

Default Page Image

Upload Image Click to select the default image to use on the Comparison page.

Delete Image Click to delete the default image that is being used on the Comparison page.

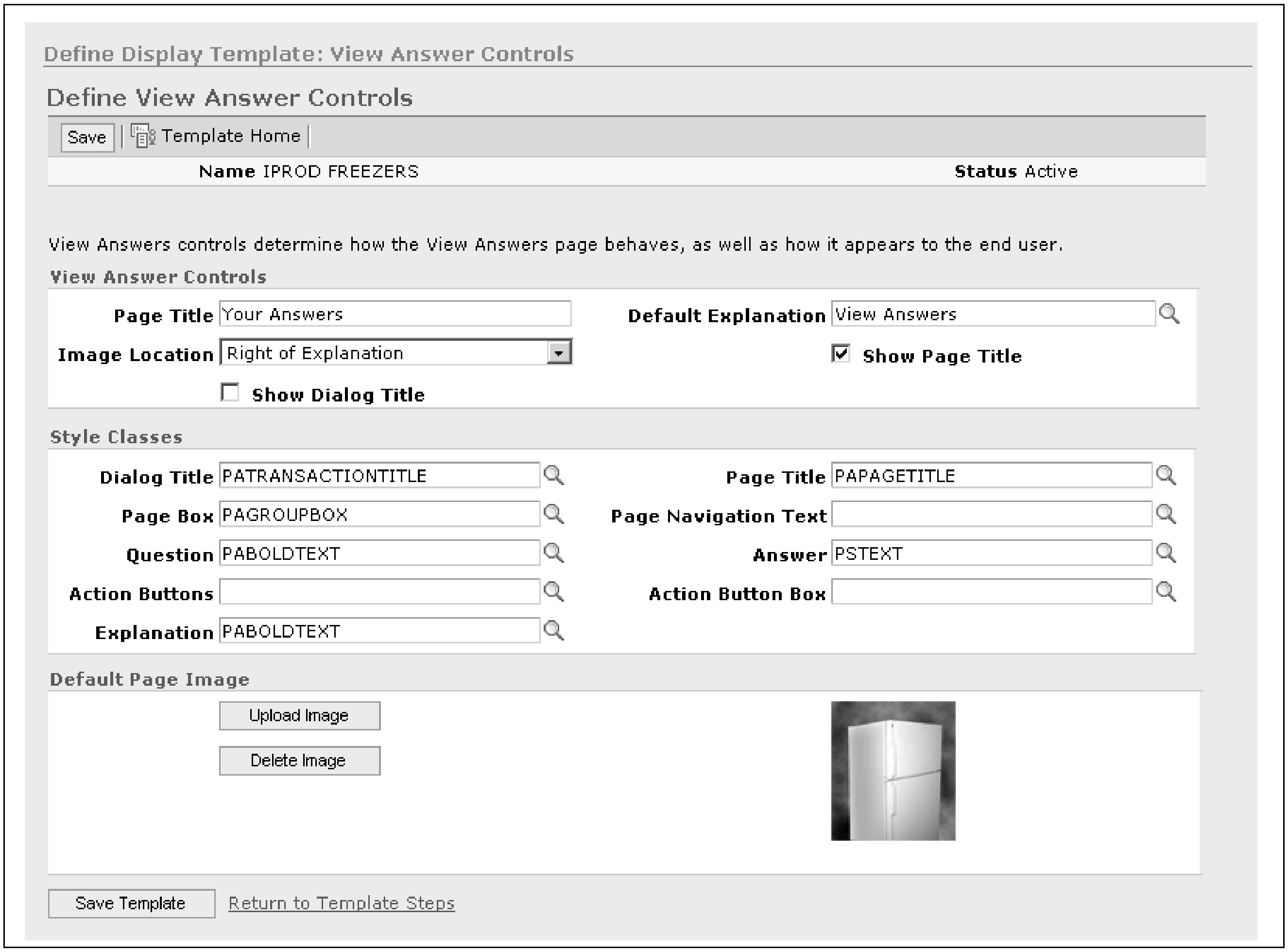
See Also

Chapter 5, "Defining Display Templates," Defining Page Controls, page 92

Chapter 5, "Defining Display Templates," Defining Recommendation Controls, page 94

Defining View Answer Controls

Access the Define View Answer Controls page.



Define View Answer Controls page

View Answer Controls

Page Title Enter the page title that is to be used for the View Answers page. There is a 75-character limit.

Default Explanation Enter a default explanation to use if none are available for a page.

Image Location Select where to place the image. Values are: *Right of Explanation* and *Left of Explanation.*

Show Page Title Select to display a page title when the Page Title field is empty.

Show Dialog Title Select to display the dialog title on the page.

Style Classes

Dialog Title Enter a style class for the dialog title, if used.

Page Title Enter a style class for the page title, if used.

Page Box Enter the style class that applies to the box surrounding the grid.

Page Navigator Text Enter the style class for the page navigator text.

Question Enter the style class for the question text.

Answer Enter the style class for the answer text.

Action Buttons Enter a style class for the action buttons.

Action Button Box Enter a style class for the framed box that surrounds actions in the runtime.

Explanation Enter a style class for the Explanation button.

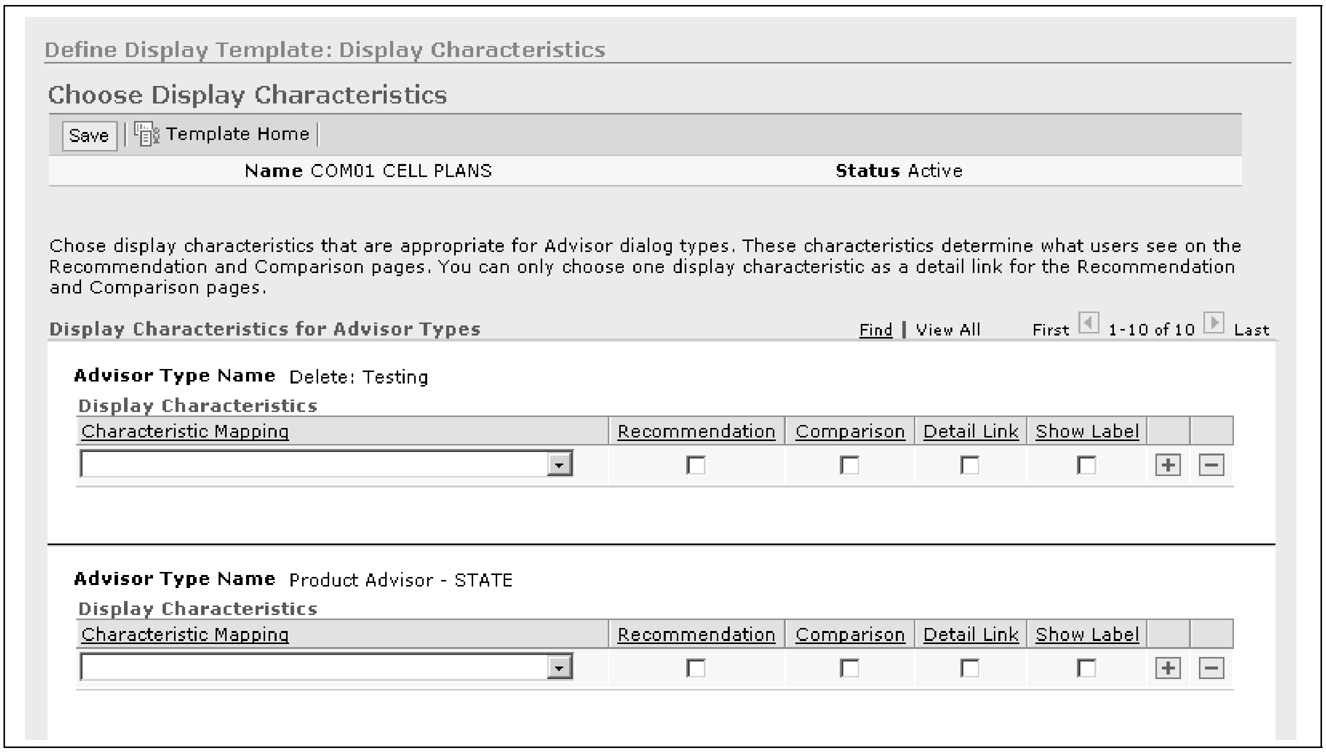
Default Page Image

Upload Image Click to select the default image to use on the View Answers page.

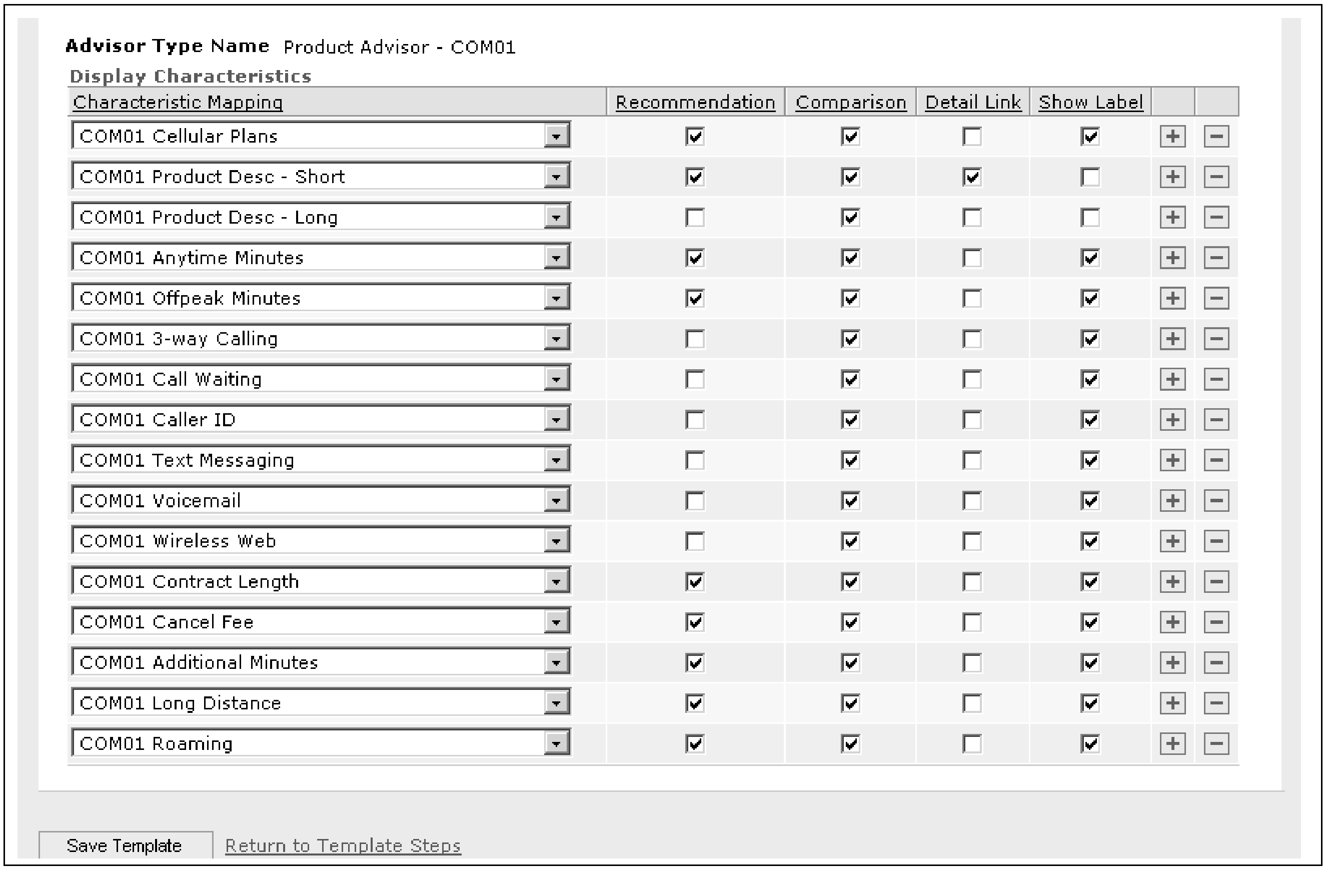
Delete Image Click to delete the default image that is being used on the View Answers page.

Choosing Display Characteristics

Access the Choose Display Characteristics page.



Choose Display Characteristics page (1 of 2)



Choose Display Characteristics page (2 of 2)

Display Characteristics for Advisor Types

This scroll area may have multiple advisor types listed. Set up the display characteristics for each advisor type that may use this template. Display characteristics defined here are used by quiet dialogs. The first 10 Advisor Types will show, use the scroll area controls to move to others. The information set up here is also needed for dialogs run in quiet mode as these determine the information returned with the recommendation set.

Characteristic Mapping Select display characteristics for the advisor type.

Recommendation Select to use this characteristic for recommendations. This characteristic appears in the Details column on the Recommendation page or is returned with recommendations when the dialog is run in quiet mode.

Comparison Select to use this characteristic for comparisons. This characteristic appears on the comparison page or is returned with recommendations when the dialog is run in quiet mode.

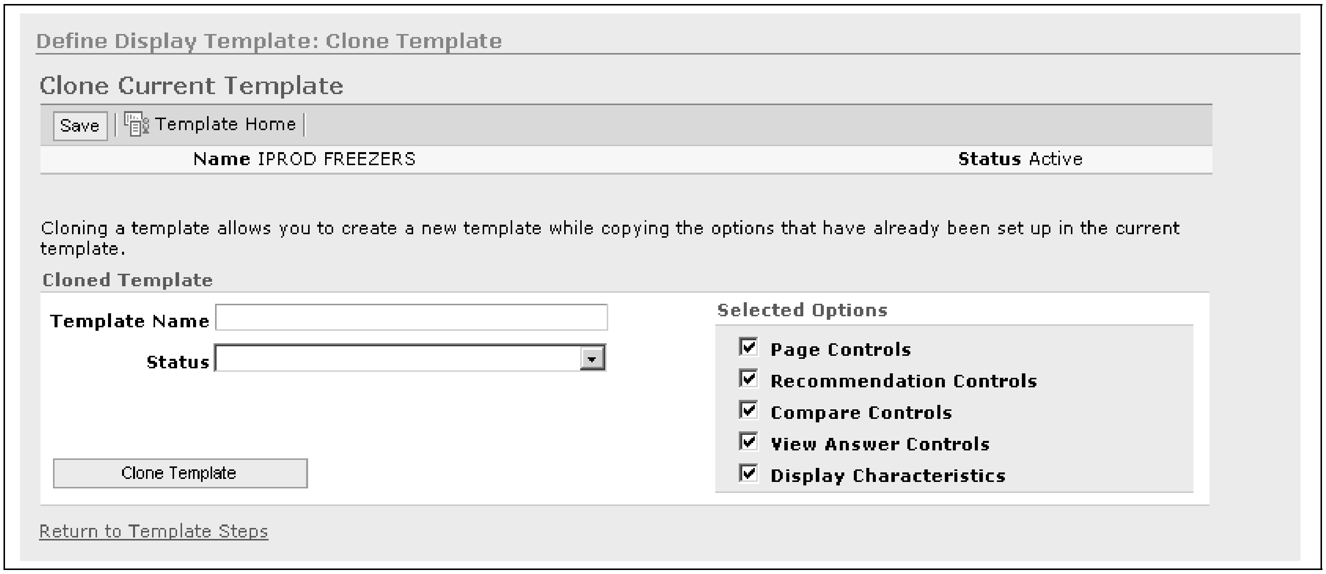
Detail Link Select to use this characteristic as the detail link. At runtime, detail links are used by the system to determine which characteristic to enable as a drillable link. This is usually the title or description characteristic of the recommended object. This characteristic is also returned with recommendations when the dialog is run in quiet mode

Note. Only one display characteristic can be identified as the detail link on the comparison or recommendation pages.

Show Label Select to display the label for the characteristic in the details column of the recommendation page.

Cloning Current Templates

Access the Clone Current Template page.



Clone Current Template page

Cloned Template

Template Name Enter a new template name for the template. There is a 30-character limit.

Status Displays either active or inactive status.

Clone Template Click to clone the current template.

Selected Options

Select the following check boxes to copy specified items: Page Controls, Recommendation Controls, Compare Controls, View Answer Controls, and Display Characteristics.

Using PeopleSoft Real-Time Advisor

This section provides an overview of PeopleSoft Real-Time Advisor runtime, how decisions in the dialog creation and template settings affect the presentation of the dialog, and discusses how to:

- Run PeopleSoft Real-Time Advisor.
- Navigate question and answer pages.
- View and edit answers.
- View recommendations.
- Compare recommended products, services, or solutions.

- Save dialogs.
- Exit PeopleSoft Real-Time Advisor.

Understanding PeopleSoft Real-Time Advisor Runtime

You can run PeopleSoft Real-Time Advisor from a variety of PeopleSoft CRM applications, such as PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, industry-specific CRM applications, and from catalogs. You can also run PeopleSoft Real-Time Advisor in debugging mode from the Advisor Workbench tool.

In debugging mode, an additional group box appears beneath the runtime page to identify the activity that has occurred. The information that appears is useful in correcting unforeseen problems that may arise in the return of data or the flow of the dialog itself. It appears on every runtime page. This group box may also appear in other calling applications depending on the mode in which PeopleSoft Real-Time Advisor was called.

Note. PeopleSoft Order Capture enables the CSR (Customer Service Representative) to turn on Real-Time Advisor session information. This feature allows the CSR to see session (debugging) information when running a dialog for a customer. By default, session information is turned off. This option is available on the Order Capture Business Unit Definition page.

See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*, “Defining PeopleSoft Order Capture Business Units”.

When you run PeopleSoft Real-Time Advisor, a start page containing questions appears. Users answer questions and have several options available; these are determined by the dialog creator, who added actions to the page during dialog creation. Users can view or edit previous answers, ask for a recommendation, go to the next page, go back a page, or compare objects that are recommended. They can save the dialog interaction at any point or can continue to access information on the object by viewing the details of the recommended object. Behind the scenes, the PeopleSoft Real-Time Advisor runtime engine determines the next page depending on the user action and possibly the transitions and may perform calculations relevant to the recommendation model as determined while using the Advisor Workbench tool during setup.

Four key runtime page types rely on template information. Each page has its own set of template controls to control the appearance of each independently:

- Question and Answer.
- Recommendation.
- Compare.
- View Question and Answer.

See Chapter 5, “Defining Display Templates,” Defining Display Templates, page 88.

When you first initialize the runtime engine, PeopleSoft Real-Time Advisor checks several characteristics of the dialog before allowing the dialog to run. First, it verifies that there is a deployed version of the dialog and the dialog is active. Next, the system checks to make sure that the current date is within the start date and end date for the dialog. If either of these are invalid, the dialog does not run, and the system returns an error. If you are running PeopleSoft Real-Time Advisor from the Test Dialog link in the Advisor Workbench tool, the system verifies that the dialog status is *Testing* or *Deployed* before running the dialog.

In quiet mode the dialog is run immediately using information about the user from the system or from AAF and delivers recommendations to the calling application. In interactive mode the dialog is run and the user is presented with the Real-time Advisor runtime as determined by the dialog settings and the display templates.

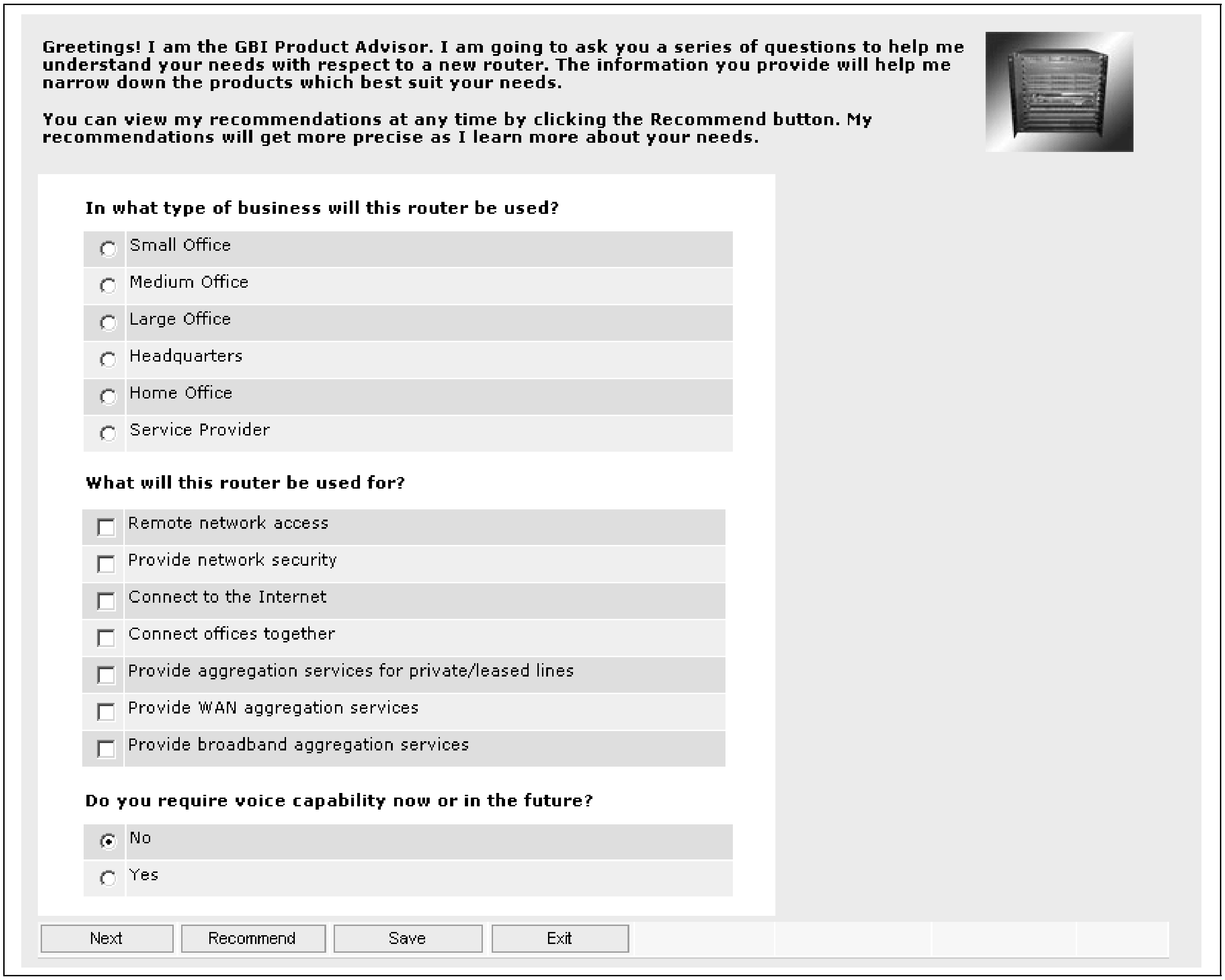
Pages Used to Run PeopleSoft Real-Time Advisor

Page Name	Object Name	Navigation	Usage
Introduction, Question and Answer	RAD_ADVISOR_RUN	• Click the Product Advisor links in one of the calling applications. Examples include, the Need help choosing a product? link in PeopleSoft Order Capture Self Service, or the Get Recommendations link in PeopleSoft Order Capture. • Run PeopleSoft Real-Time Advisor from internal CRM applications. • Test the dialog from the Advisor Workbench tool.	Answer questions and move through a dialog. Depending on the dialog, you may be able to access a recommendation or view debugging information.
View Answers	RAD_ADVISOR_RUN	• Click the Product Advisor, PeopleSoft Advisor, or Advisor links in PeopleSoft CRM self-service applications. • Run PeopleSoft Real-Time Advisor from internal CRM applications. • Click the View My Answers button. • Test the dialog from the Advisor Workbench tool.	View previous responses to questions and change the answers.
Recommendations	RAD_ADVISOR_RUN	• Click the Product Advisor, PeopleSoft Advisor, or Advisor links in PeopleSoft CRM self-service applications. • Run PeopleSoft Real-Time Advisor from internal CRM applications. • Click the Recommend button. • Test the dialog from the Advisor Workbench tool.	View recommendations returned by the PeopleSoft Real-Time Advisor recommendation engine.

Page Name	Object Name	Navigation	Usage
Compare Selected Products	RAD_ADVISOR_RUN	• Click the Product Advisor, PeopleSoft Advisor, or Advisor links in PeopleSoft CRM self-service applications. • Run PeopleSoft Real-Time Advisor from internal CRM applications. • Click the Recommend button, make multiple selections, and then click the Compare Selected button. • Test the dialog from the Advisor Workbench tool.	Compare two or more recommended products, services, or solutions.

Running PeopleSoft Real-Time Advisor

Access the Introduction page.



Introduction page

Depending on the template controls for the dialog and the page contents, this information may appear:

- Dialog name.
- Page name.
- An explanation for the page.
- Questions and answers for the page.
- Applicable actions for the page.

  You determine the content of the page when you create it. The look of the page is based on the template that you used for the page or dialog.

Note. There may be session information shown at the bottom of the page, depending on how Advisor was called. The session information will appear if the session is run from the Advisor Workbench tool or if the calling application requests session information be shown when it started Advisor.

See Chapter 5, “Defining Display Templates,” Understanding the Recommendation Experience, page 87.

Navigating Question and Answer Pages

Access a <Question and Answer> page.

<Question and Answer> page

Users can navigate through the entire collection of pages, answering the questions that appear.

Note. The page title is not static. It is determined while working with the Advisor Workbench tool in the Layout Pages and Transitions step, or if not set there, it is defined in the template.

Recommend
Click to access the Recommendations page. You can compare two or more selected products, or you can drill into a selected product, service, or solution.

Save
Click to save the current session information to the database. Enter a name for the saved session.

Start Over
Click to return to the start of the dialog. This clears the question and answer lists, as well as the path guide.

Exit
Click to exit the runtime process and return to the calling application. If there has been a save during the session, the calling application is given a session ID to return to the session at a later time. For example, suppose that users run PeopleSoft Real-Time Advisor from PeopleSoft Order Capture; they would return to the order-entry form within that application. If the user was a dialog creator who was testing the runtime activity, that person would return to the main Advisor Workbench page.

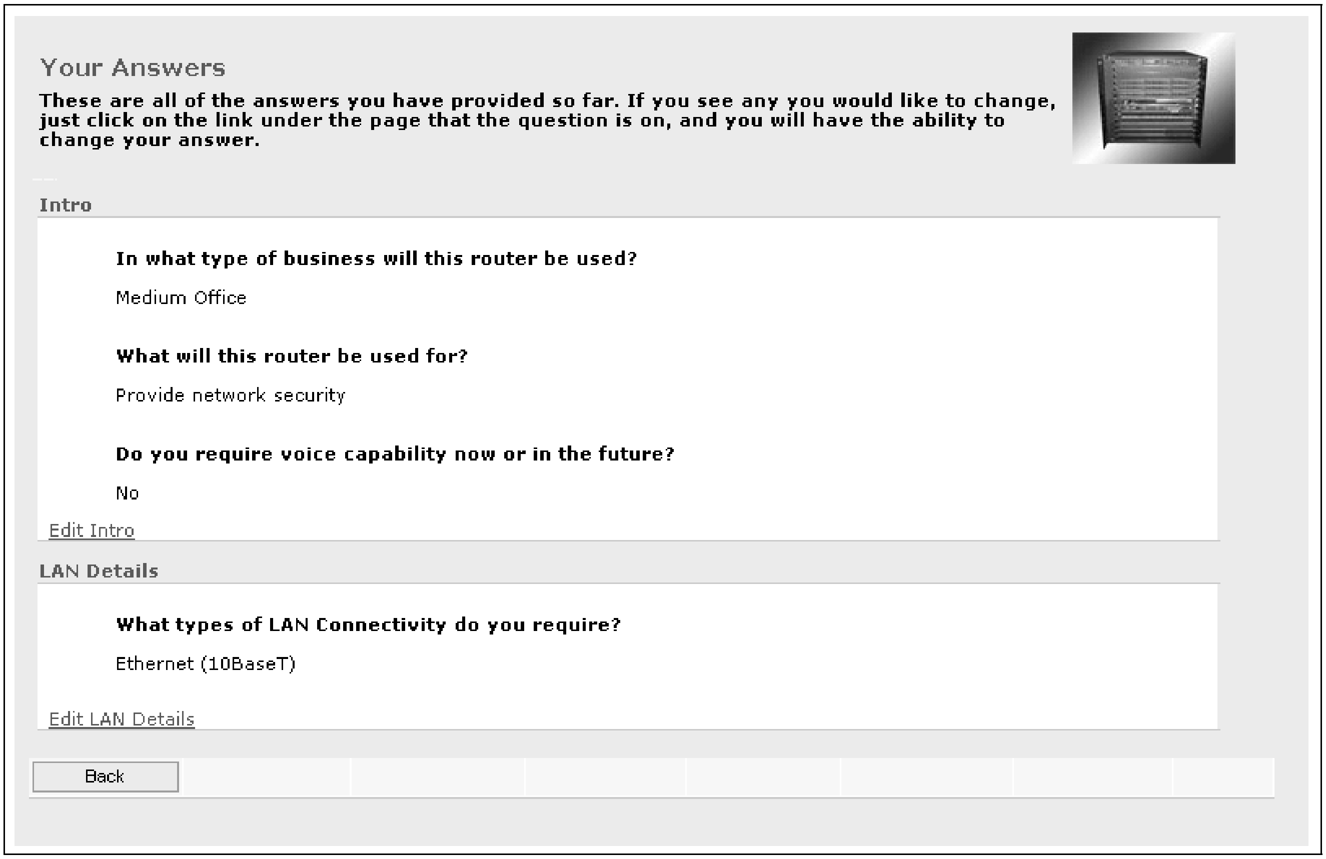
View My Answers
Click to go back and modify question answers in the path. If you make modifications, the system updates the path guide to the selected page, and it updates the recommendation and question and answer list. The dialog then restarts from selected page using the transitions of the page, as well as the action designated by the users. Any answers to questions further into the dialog are saved and used if the question appears again. However, these answers do not influence a recommendation; they are for viewing purposes only and are not used to determine user target groups.

Back
Click to return to the page that appeared prior to the current page.

Note. This automatically updates the path and the question and answer lists.

Viewing and Editing Answers

Access the View Answers page.



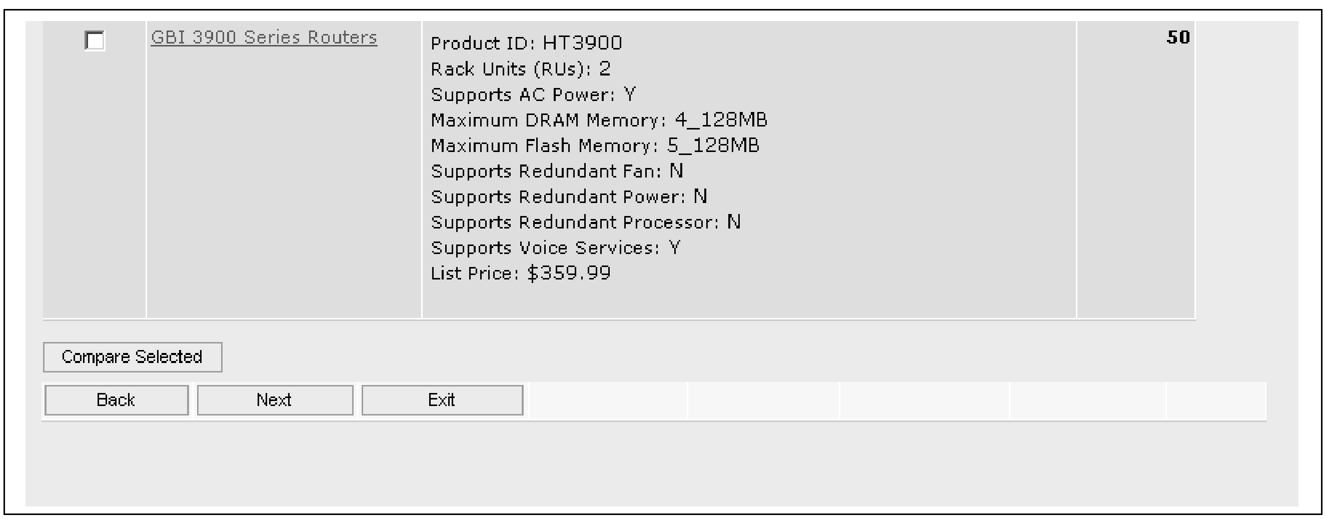
View Answers page

Click the page link that appears beneath the question that you want to change to edit answers. Click Back to return to the previous page.

Viewing Recommendations

Access the Recommendations page.

Recommendations page (1 of 2)



Recommendations page (2 of 2)

Recommendations

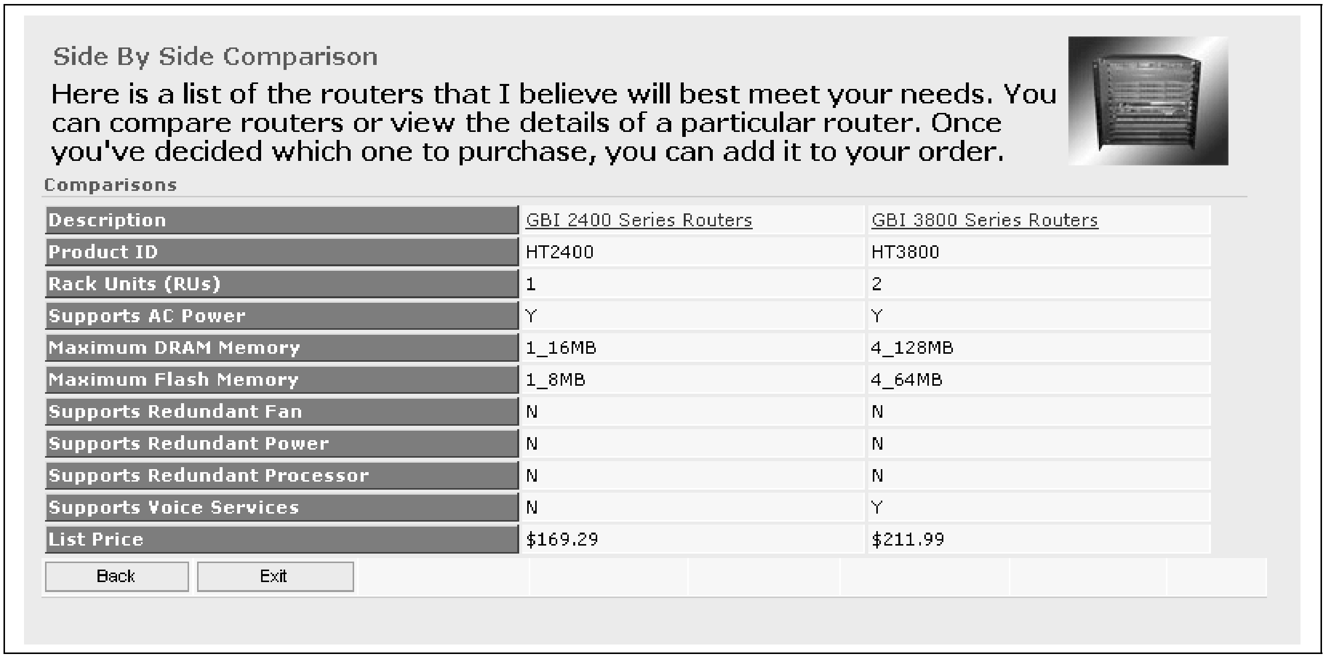
Compare Select the check boxes for each recommended object that you want PeopleSoft Real-Time Advisor to compare against one another.

Description Displays the Detail Link characteristic as set up in the display template, such as a product ID or short description.

Details	Displays object details. The characteristics that display in this column are determined by the selected Recommendation characteristics selected in the dialog template.
Score	Displays a score based on the settings in the recommendation controls for display templates.
Compare Selected	Click this button after you have selected two or more recommended objects, and the PeopleSoft Real-Time Advisor engine compares the recommended products using a variety of data.

Comparing Recommended Products, Services, or Solutions

Access the Compare Selected Products page.



Side By Side Comparison

Here is a list of the routers that I believe will best meet your needs. You can compare routers or view the details of a particular router. Once you've decided which one to purchase, you can add it to your order.

Comparisons

Description	GBI 2400 Series Routers	GBI 3800 Series Routers
Product ID	HT2400	HT3800
Rack Units (RUs)	1	2
Supports AC Power	Y	Y
Maximum DRAM Memory	1_16MB	4_128MB
Maximum Flash Memory	1_8MB	4_64MB
Supports Redundant Fan	N	N
Supports Redundant Power	N	N
Supports Redundant Processor	N	N
Supports Voice Services	N	Y
List Price	$169.29	$211.99

Back Exit

Compare Selected Products page

The Compare Selected Products page displays a side-by-side comparison of the recommended products that were selected on the Recommendations page. The characteristics shown and how they are shown are determined by the display template for the dialog.

Saving Dialogs

Access the Save Dialog page.

Save Dialog page

Enter a name for the dialog session, and then click the Save button to save the dialog in its current state. Later, you can resume the session where you left off. This functionality is not available while running from the Advisor Workbench tool with the Test Dialog functionality.

Exiting PeopleSoft Real-Time Advisor

Click the Exit button at any point in the dialog session to exit and return to the calling application, or to the Advisor Workbench tool if you are in *Test* mode.

APPENDIX A

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook." Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D’Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People’s Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement
This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take
This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class
In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date
The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split
The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator
You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason
The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template
In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity
In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them.
	For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file | Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group | In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components | In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment | In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping | You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable | In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load | In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality | In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location | Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task | In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object*.

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context — In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query — You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section — In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event — In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy — In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production — In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session — In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template — In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship — In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression — In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon — With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction — In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart — A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType — A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging — A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account — Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step — In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level — In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier — A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField — You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger — An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period — In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree — A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate — To distribute a production version of the enterprise catalog to partners.

system function — In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet — A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing — Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency — The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template — A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory — In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan — A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order — In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet — A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist — The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema — An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation — In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT — Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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