
PeopleSoft Enterprise Real-Time Advisor CRM 9 PeopleBook

August 2006

PeopleSoft Enterprise Real-Time Advisor CRM 9 PeopleBook
SKU CRM9ADV-B 0806
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About This PeopleBook

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise 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 <i>O</i> .
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)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

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 Enterprise 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.

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.

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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in 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	<p>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.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
SetID	<p>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.</p>
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise CRM Real-Time Advisor Preface

This preface discusses:

- PeopleSoft Enterprise Customer Relationship Management 9 (PeopleSoft Enterprise CRM 9) application fundamentals.
- PeopleSoft Enterprise CRM 9 automation and configuration tools.
- PeopleSoft Enterprise CRM 9 business object management.
- PeopleSoft Enterprise CRM 9 product and item management.

PeopleSoft Enterprise CRM 9 Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft Enterprise CRM system. That book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft Enterprise CRM product line.

The *PeopleSoft Enterprise 9 CRM Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

This part discusses the design and setup of the PeopleSoft Enterprise 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 Enterprise 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 9 Application Fundamentals PeopleBook

PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application *PeopleBook*.

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management.

This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration Tools.

This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge Management.

This part discusses the setup of Natural Language Processing (NLP) and Verity search.

- Business process management.

This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

- The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
- The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
- The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
- The setup and execution of business projects.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM 9 Business Object Management

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft Enterprise CRM.

The *PeopleSoft Enterprise CRM 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 9 Business Object Management PeopleBook

PeopleSoft Enterprise CRM 9 Product and Item Management

The *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft Enterprise CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook

CHAPTER 1

Getting Started with PeopleSoft Enterprise Real-Time Advisor

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

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

Real-Time Advisor Overview

Real-Time Advisor is part of the PeopleSoft Enterprise CRM Marketing suite of products. The integration between dialog marketing functionality and the Real-Time Advisor enables robust, interactive campaigns and marketing experiences by providing a roadmap of questions that lead to specific answers. The system uses the Prescriptive Analytic Framework (PAF) profiles to create this roadmap. With Real-Time Advisor, you collect buyer information and use that information to match buyers with products, services, or solutions. For example, a marketing professional can specify the various conditions that drive each question. This can cause call center cases to be flagged when there is an up-sell opportunity. The call center agent can then ask the necessary questions to make a sale and increase revenue.

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

Real-Time Advisor Business Processes

With Real-Time Advisor, you can:

- Create a highly configurable, intuitively interactive dialog that delivers recommendations within the parameters that 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 Prescriptive Analytic Framework 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 Prescriptive Analytic Framework and use it to segment users and influence recommendations, and to determine the user's experience.
- Provide each user with a choice of recommendations and the ability to compare alternatives.
- Automate dynamic cross-selling and up-selling to increase revenue and average selling prices.
- Deliver recommendations at any time.
- Integrate Real-Time Advisor with a recommendation source other than the PeopleSoft Enterprise CRM product model to recommend objects other than products (such as courses, services, or solutions).

Real-Time Advisor Integrations

Real-Time Advisor integrates with the PeopleSoft Enterprise CRM product data model and PeopleSoft Enterprise 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. Through the Prescriptive Analytic Framework, Real-Time Advisor can be used for dynamic cross-sell and up-sell opportunities.

PeopleSoft Real-Time Advisor Access Points

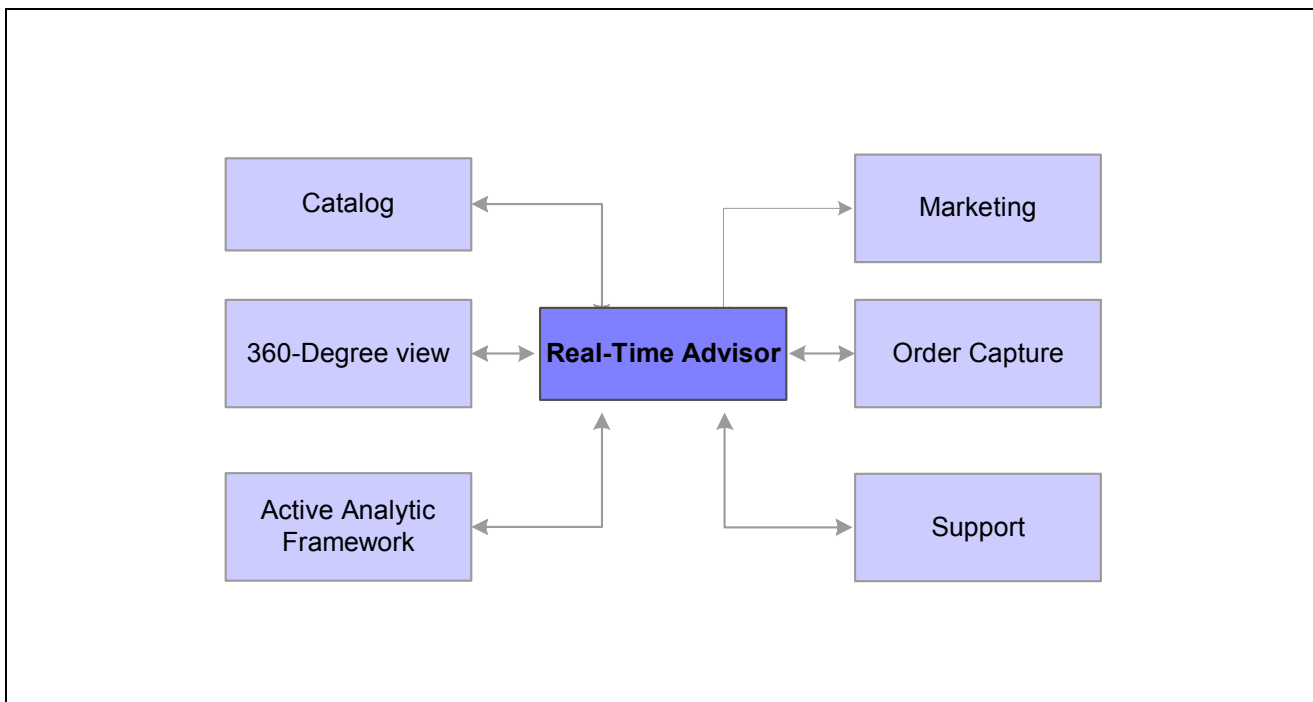
Real-Time Advisor can be invoked directly from:

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

With the addition of the Prescriptive Analytic Framework, Real-Time Advisor can also be indirectly invoked from:

- PeopleSoft Enterprise Support and HelpDesk cases.
- 360-degree view.
- Marketing waves.
- PeopleSoft Enterprise Order Capture.
- PeopleSoft CRM Accounts.
- Offer Management.

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



Launching Real-Time Advisor

Integration with CRM Applications

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

For example, if you license both Real-Time Advisor and Order Capture, you can create product or service recommendations directly from the order entry form without any special configuration.

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

- Order Capture uses Real-Time Advisor to enable customer service representatives to find the right product for a customer.
- Catalog uses Real-Time Advisor to give product recommendations and to aid 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 activities can use Real-Time Advisor to cross-sell or up-sell products or services through direct activity channels.
- Service Management can use its Lost and Stolen Handset functionality to invoke an Advisor dialog to convince a customer to order a new handset to replace a lost or stolen one.
- Through the Prescriptive Analytic Framework, CRM Accounts can offer products to convince a customer to move from a Prepaid offering to a Postpaid offering.
- Through the Prescriptive Analytic Framework, 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 Prescriptive Analytic Framework, products and services are displayed in the 360-degree view as cross-sell or up-sell opportunities when the customer view is invoked or the customer's role is changed.

Integration with Other PeopleSoft Enterprise Data Models

Real-Time Advisor is also designed to work with other PeopleSoft Enterprise 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 Real-Time Advisor Environment," page 11](#).

Real-Time Advisor Implementation

PeopleSoft Enterprise 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 manager, performs advanced setup tasks (including environment setup) for Real-Time Advisor. The equivalent of a marketing manager, who is familiar with both products and users, creates the dialogs.

Setup in Calling Applications

The integration between Real-Time Advisor and the individual calling applications is configured on 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 9 Product and Item Management PeopleBook*, "Creating Catalogs".

To configure Support to use Real-Time Advisor:

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Setting Up Links and Related Actions".

To configure the Prescriptive Analytic Framework for cross-selling and up-selling:

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Actions in Policies.

To set up marketing activities for cross-selling and up-selling:

See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, "Setting Up PeopleSoft Enterprise 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 9 Application Fundamentals PeopleBook* with information on where to find the most up-to-date version of each.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Configuring Advisor Actions

CHAPTER 2

Understanding Real-Time Advisor

This chapter discusses Real-Time Advisor terminology.

Real-Time Advisor Terminology

This PeopleBook uses some special terminology that relates to Real-Time Advisor, preparation of the Real-Time Advisor environment, and creation of recommendations.

Action	An action represents a possible page action. Actions normally appear as common buttons such as Next, Back, Start Over, and Recommend. The system presents the next page to the user based on the selected action and any transition rules in effect.
Calling application	Calling applications are the applications that use Real-Time Advisor dialogs to provide recommendations or to gather data. Calling applications use Real-Time Advisor to cross-sell or up-sell products and to enable the user to locate the correct product. Examples of calling applications include PeopleSoft Enterprise Order Capture, PeopleSoft Enterprise CRM Catalog, and PeopleSoft Enterprise Support and HelpDesk.
Characteristics	Characteristics are used by Real-Time Advisor to locate the right object for the user. They are an aspect of the recommendable object (such as an attribute, feature, or product grouping) that 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 <i>Camping Gear</i> and <i>Computers</i> .
Condition	Conditions are logical statements that consist of information about the user or the environment obtained through the Prescriptive Analytic Framework (PAF). The information is used by 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 PAF and 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 to arrive at a recommendation, or it can be a session in Quiet mode that uses information already known about the user to generate recommendations. Additionally, it can be a session to gather information

about the user. 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 PAF. When a dialog runs in Interactive mode, the Real-Time Advisor runtime environment displays pages with questions, and the user's answers influence recommendations.

Display Templates

Display templates determine how dialogs are presented to the user. Preferences include such things 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. They 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, free-form text (which can include HTML) and universal resource locator (URL) links.

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 modify.

Questions and Answers

Questions and answers are inquiries that call for a response from a user. A dialog poses questions to users, and answers determine the target group of the users, which may in turn control the flow of the dialog. Question and answer types in 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 Free-form Text (which is used to gather information).

Question Library

A question library contains a set of related questions. For example, a computer question library might 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 Real-Time Advisor for presentation to the user. The Real-Time Advisor recommendation engine relies upon a user's answers to dialog questions and conditions to deliver a set of recommendations. A recommendation result set is retrieved from the database tables that are identified during Real-Time Advisor environment creation.

Target Group

Target groups represent a particular portion of the market. 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 obtained from the Prescriptive Analytic Framework. 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 on conditions as well as answers to questions. Transition logic has a test, a Boolean expression, which determines the destination page if the Boolean expression is true. Transition rules are launched when a user clicks the Next button at runtime.

Weighting Model

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 any existing conditions are used to determine the user's target group. The Real-Time Advisor engine applies the weight to determine a ranked list of recommendations.

CHAPTER 3

Preparing the Real-Time Advisor Environment

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

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

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

See Also

Chapter 4, “Setting Up Real-Time Advisor Dialogs,” page 29

Understanding Real-Time Advisor Environment Preparation

The PeopleSoft system provides statuses, steps, actions, and several predefined types for enabling Real-Time Advisor automatically. To take full advantage of the 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 the dataset.

There are two parts to preparing Real-Time Advisor for use by the dialog creators who create the actual recommendation experience in the Advisor Workbench tool:

1. Define the 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 Process Scheduler on the application server.

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

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

Building the Real-Time Advisor Environment

To build the Real-Time Advisor Element, use the Define Steps (RAD_STEPS), Define Actions (RAD_ACTIONS), Define Statuses (RAD_STATUS), Advisor Workbench (RAD_ADVISOR), Define Type (RAD_ADVISOR_TYP), and Define Characteristic Mapping (RAD_CHARA_MAP) components.

This section discusses how to:

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

Pages Used to Build the 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 that are necessary to create a dialog.
Define Type	RAD_ADVISOR_TYP	Set Up CRM, Product Related, Advisor, Define Type	Define the type of dialog to create. The type 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 to retrieve the data that the Real-Time Advisor recommendation uses.
Test Characteristic Mapping	RAD_REC_ENT_TEST	Set Up CRM, Product Related, Advisor, Define Characteristic Mapping Click the Test Characteristic Mapping link, select either <i>Stored Location</i> or <i>Value Location</i> , and click the Test button.	Test the characteristic mapping of the current definition.

Defining Actions

Access the Define Actions page.

Set Up Advisor Environment

Define Actions

Create all available actions here. Action buttons control what an end user can do within a dialog. Sequence determines the order of presentation, and Action Type controls what the action does.

Action Definitions

*Action	Sequence	*Label	Description	*Action Type		
Next	2	Next	Moves to next Page in dialog	Next	+	-
Recommend	3	Recommend	Makes recommendation given ans	Recommendation	+	-
Save	4	Save	Saves dialog in current state.	Save	+	-
Start Over	7	Start Over	Begins dialog again and clears all	Start Over	+	-
Exit	6	Exit	Exits Dialog	Exit	+	-
View My Answers	5	View My Answers	Views all previous answers	Answers	+	-
Back	1	Back	Moves back through dialog	Back	+	-

Define Actions page

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

Action Definitions

Action

Create the actions that are available for selection in 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. The PeopleSoft system provides these predefined actions: *Next*, *Recommend*, *Save*, *Start Over*, *Exit*, *Answers*, and *Back*. There is a 30-character limit.

Sequence

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

Label

Enter 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

Select to determine the behavior of Real-Time Advisor when you click the action button.

The values are:

- *Answers*: Displays the View Answers page.
- *Back*: Displays the preceding page.
- *Exit*: Quits the dialog and returns the user to location from which Real-Time Advisor was called.
- *Next*: Displays the next page in the dialog, based on the transitions for the page.

- *Recommendation*: Provides a list of recommendations based on 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.

Set Up Advisor Environment

Define Statuses

Create all available statuses here. Statuses are used to show a dialog's stage of creation. Statuses allow you to define all allowable stages for dialogs. Use Status Types to determine how a status should be used.

Status Definitions

*Description	Long Description	*Status Type		
Deployed	Dialog version has been tested and validated, and is rea	Deployed	+	-
Edit In Progress	Dialog version is being worked on. Has not been validat	In Progress	+	-
Inactive	Dialog is no longer used or available.	Archived	+	-
Past Deployed	Dialog version was deployed but is not longer the active	Past Deployed	+	-
Testing	Dialog version has been validated, but is not set for gen	Validated	+	-

Define Statuses page

The status indicates the development stage of the dialog. User-defined statuses provide flexibility.

Status Definitions

Description

Enter text that on the Advisor Workbench page and describes the state of the dialog. There is a 30-character limit.

Status Type

Select to specify the state of the dialog version.

Values are:

- *Archived*: The 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*: The dialog version can be run by a calling application.
- *In Progress*: The dialog version is in the process of being created or modified.
It is not currently available for calling applications, because it is not yet validated and deployed.
- *Past Deployed*: The 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 deployed version of the dialog runs.
- *Validated*: The 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 after 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.

*Description	Step Explanation	*Step Type		
Create Recommendation Model	Create Recommendation Model that targets specific	Weighting Model	+	-
Define Target Groups	Define the Target Groups to be used in the weighting	Define Target Groups	+	-
Layout Pages & Transitions	Layout Dialog Pages and the Transitions between the	Page Management	+	-
Select Characteristics	Select the object characteristics to include in the wei	Select Characteristics	+	-
Select Conditions	Select external conditions to influence target groups	Select Conditions	+	-
Select Questions	Select the questions to include in the Dialog here. Yc	Select Questions	+	-
Test Dialog	Preview what the Dialog will look like to your custom	Test Dialog	+	-
Validate Dialog	Check the Dialog for errors. Must be done before te	Validate Dialog	+	-

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 that are in the weighting model.
- *Page Management*: Lay out 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.
Select questions from an existing question library or create new questions.
- *Test Dialog:* Preview how the dialog appears to users.
- *Validate Dialog:* Check the dialog for errors. This validation must be done before testing or deploying the dialog.
This step automatically saves the dialog before validation.
- *Weighting Model:* Create a recommendation model that targets specific users for recommendations.

Defining Type

Access the Define Type page.

Set Up Advisor Environment

Define Type

Types are used to control how a dialog will be used and the functionality of a dialog. Here you determine the steps, statuses and recommendation specific information. Use Base Record to specify the record that will be used for recommendations.

Type Details

* **Advisor Type Name** Product Advisor

* **Status** Active

Description Used to advise on products

Base Record PROD_ITEM

Cache Options

Dialog Refresh (Minutes) 240

Number to Cache 500

Cache Record RAD_PRDCACHE

Base Record Key Fields



Field Name	Sequence		
SETID	1	+	-
PRODUCT_ID	2	+	-

Advisor Steps

Description	*Sequence	*Step Usage
Select Questions	1	Show
Select Conditions	2	Show
Layout Pages & Transitions	3	Show
Define Target Groups	4	Required
Select Characteristics	5	Required
Create Recommendation Model	6	Required
Validate Dialog	7	Required
Test Dialog	8	Show

Define Type page (1 of 2)

Advisor Status	
Description	Show
Edit In Progress	<input checked="" type="checkbox"/>
Testing	<input checked="" type="checkbox"/>
Deployed	<input checked="" type="checkbox"/>
Inactive	<input checked="" type="checkbox"/>
Past Deployed	<input checked="" type="checkbox"/>

Detail Information	
Application Class	Drill  Package Tree Viewer
ID	
Application Class Path	RAD_PRODUCT 

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. The PeopleSoft system provides the predefined *Product Advisor* type to recommend products. However, you can set up the system 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 the object that a dialog recommends and the kind of dialog you are creating. The PeopleSoft system provides the predefined advisor type called <i>Product Advisor</i> . You use this type to recommend products from the PeopleSoft Enterprise CRM product data model.
Status	Select <i>Active</i> or <i>Inactive</i> for the dialog type.
Description	Enter a description of the 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 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 Process Scheduler. The steps are outlined in the final section of this chapter.

Dialog Refresh (Minutes)	Enter how often the cache refreshes for the dialog type.
Number to Cache	Enter the number of objects to be cached for each target group. The default value is <i>500</i> . This means that if there are 10 target groups for a dialog, 50,000 objects are cached. This represents the top 500 for each target group.
Cache Record	The Real-Time Advisor recommendation engine uses this table to store the recommendations. The PeopleSoft system provides <i>RAD_PRDCACHE</i>

as the cache record for the advisor type named Product Advisor, which is delivered as system data.

To recommend objects other than products, create the advisor type by using a base record other than *PROD_ITEM*. You must then create a new cache record in the database, and it must contain the following information:

- The subrecord RAD_GENKEY_SBR, which is provided with the PeopleSoft system.

Use this subrecord as delivered.

- A subrecord that contains the keys for the recommended objects.
- 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 called 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 <i>Hidden</i> if the step does not appear. Select <i>Shown</i> if the step appears but is optional. Select <i>Required</i> if the step appears and is required.

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

Advisor types for dialogs that are 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 used for recommendations (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 these check boxes 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 various 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, Real-Time Advisor needs information about the type of information to present and how to present it. In the Detail Information group box, you specify the PeopleCode that the system launches when the user drills into a recommendation.

- Application Class ID** Enter the application class that Real-Time Advisor launches at runtime when the user requests more information about 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 recommends 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 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 9 Automation and Configuration Tools PeopleBook, “Using Application Classes,” Working with Application Classes

Defining Characteristic Mapping

Access the Define Characteristic Mapping page.

Set Up Advisor Environment

Define Characteristic Mapping

Characteristics are mappings to stored data in the source record. These mappings are used to retrieve data used by the Advisor recommendation. 'Where Clauses' limit data retrieved by Advisor.

Characteristic Details

*Description

COM01 3-way Calling

*Status

Active

*Advisor Type

Product Advisor - COM01

*External Label

3-way calling

Test Characteristic Mapping

Characteristic Types

☒ Display

☒ Recommendation

Description

Provides 3-way calling

Characteristic Stored Location

*Source Record

RB_PRDATTMAP_VW

*Field Name

ATTR_ITEM_ID

Where Clause

And/Or	Open	Field Name	Operator	Character Value	Close		
		ATTRIBUTE_ID	=	3_WAY_CALLING		+	-

Define Characteristic Mapping page (1 of 2)

Characteristic Value Location

Value Type

☐ Numeric

☒ **Mapped Value**

Source Record RB_PRDATTMAP_VW

Description Field ATTR_ITEM_VALUE

Value Field ATTR_ITEM_ID

Value Where Clause

And/Or	Open	Field Name	Operator	Character Value	Close
		ATTRIBUTE_ID	=	3_WAY_CALLING	

Define Characteristic Mapping page (2 of 2)

Characteristics are needed to create dialogs to recommend objects. A characteristic is an aspect of the recommended object; it is similar to an attribute or a property. Characteristic mapping enables the dialog creator to create dialogs without needing to understand the technical features of Real-Time Advisor or the underlying data model of the recommended objects.

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

Characteristic Details

Description	Enter a description that appears to dialog creators in the Advisor Workbench tool. There is a 30-character limit.
Status	Select either <i>Active</i> or <i>Inactive</i> .
Advisor Type	Select to specify the advisor type that uses the characteristic.
External Label	Enter label text that appears in the Real-Time Advisor runtime environment when the recommended object appears in a recommendation.
Test Characteristic Mapping	Click this link to verify that the mapping is valid. Test mappings to ensure that they encompass the appropriate objects and values. Otherwise, recommendation models may not have access to the necessary recommendable objects. Click the Test Characteristic Mapping link to return the objects or values matching the mappings.

Characteristic Types

This information indicates where the characteristic is used in the Real-Time Advisor dialog.

Display	Select to associate the characteristic with a display template. The display template is used at runtime to show information about a given object.
Recommendation	Select to use the characteristic in a recommendation model. In the Advisor Workbench tool, the dialog creator 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 determine valid objects to recommend based on the Source Record, Field Name, and Where Clause fields.

Source Record	Enter the record from which Real-Time Advisor retrieves valid objects. If you use the PeopleSoft Enterprise CRM product data model, you can enter <i>PROD_ITEM</i> .
Field Name	Select the field for the characteristic. Fields come from the source record.
Where Clause	<p>Select a formatted logic clause to restrict the objects used to recommend products, services, or solutions.</p> <p>A Where clause enables the use of Boolean logic to limit what the dialog creator can select. The logic at save-time ensures 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.</p> <hr/> <p>Note. If a table is set-controlled and the restriction is necessary, a characteristic must resolve this restriction in the Where clause.</p> <hr/>

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 for recommendations.

Value Type	Select the value type of the characteristic, which is either Numeric or Mapped Value. With the numeric type, the dialog creator can select a range of allowable numbers. With the mapped answer type, a list of values is displayed.
Source Record	Enter the name of the record containing 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 <i>Value Field</i> , which is used in the actual evaluation of the recommendation). The dialog creator views this information as a list.
Value Field	<p>Enter the name of the value field. This information is stored and is 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.</p> <hr/> <p>Note. In most cases, the value field is the same as the description field.</p> <hr/>
Value Where Clause	<p>Define a formatted logic clause to limit the answers that appear to the dialog creator. A Where clause enables the use of Boolean logic to limit what the dialog creator can select. The logic at save-time ensures 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.</p> <hr/> <p>Note. If a table is set-controlled and the restriction is necessary, a characteristic must resolve this restriction in the Where clause.</p> <hr/>

Example: Mapping Attributes

Here is an example characteristic mapping to create a recommendation characteristic that uses product attributes:

Set Up Advisor Environment

Define Characteristic Mapping

Characteristics are mappings to stored data in the source record. These mappings are used to retrieve data used by the Advisor recommendation. 'Where Clauses' limit data retrieved by Advisor.

Characteristic Details

*Description

COM01 Anytime Minutes

*Status

Active

*Advisor Type

Product Advisor - COM01

*External Label

Anytime Minutes

Test Characteristic Mapping

Characteristic Types

☒ Display

☒ Recommendation

Description

Number of anytime minutes provided

Characteristic Stored Location

*Source Record

RB_PRDATTMAP_VW

*Field Name

ATTR_ITEM_ID

Where Clause

And/Or	Open	Field Name	Operator	Character Value	Close		
		ATTRIBUTE_ID	=	ANYTIME_MINUTES		+	-

Characteristic Value Location

Value Type

☐ Numeric

☒ Mapped Value

Source Record

RB_PRDATTMAP_VW

Description Field

ATTR_ITEM_VALUE

Value Field

ATTR_ITEM_ID

Value Where Clause

And/Or	Open	Field Name	Operator	Character Value	Close		
		ATTRIBUTE_ID	=	ANYTIME_MINUTES		+	-

Define Characteristic Mapping page with values for mapping attributes

Note. Create a SQL view in PeopleSoft Enterprise 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. These views—or the views that you create—can access the attribute base records and the record that contains the attributes attached to the recommended object.

To create the 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 unmapped 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 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 *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.

*Test
Stored Location
Test

Number Of Test Results
20

Test Results

SETID	PRODUCT_ID	ATTR_ITEM_ID
COM01	TEL200039	1000
COM01	TEL200042	1000
COM01	TEL200048	1000
COM01	TEL200043	1500
COM01	TEL200049	1500
COM01	TEL200037	250
COM01	TEL200040	250
COM01	TEL200044	2500
COM01	TEL200050	2500
COM01	TEL200038	500
COM01	TEL200041	500
COM01	TEL000004	CUSTOM
COM01	TEL200001	CUSTOM
COM01	TEL200034	CUSTOM
COM01	TEL200045	CUSTOM
COM01	TEL200046	CUSTOM
COM01	TEL200047	CUSTOM
COM01	TEL200051	CUSTOM

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 returns the objects that match the mapping defined in the characteristic stored location. Selecting the *Value Location* option returns 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 Enter a value to limit the number of test results returned.

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

Enabling a Daemon Group in Process Scheduler

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

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

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- Run Process Scheduler.

Understanding the Daemon

The Real-Time Advisor recommendation engine uses a cache to precompute recommendations for deployed dialogs. The cache ensures dialogs are run efficiently for the end user. Dialogs that are not yet 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 always use the cache for recommendations, and they do not perform searches. 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 recently eliminated some products from the catalog. In that case, you would not want the recommendation engine to consider the eliminated 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 relatively static, the cache refresh does not need to be as frequent.

Note. The daemon and Process Scheduler do not need to be activated for Real-Time Advisor until dialogs have been deployed.

Pages Used to Enable a Daemon Group in Process Scheduler

Page Name	Object Name	Navigation	Usage
Daemon Group	DAEMONGROUP	PeopleTools, Process Scheduler, Daemon Group	Define a daemon group in Process Scheduler.
Server Daemon Details	SERVERDAEMON	PeopleTools, Process Scheduler, Servers, Daemon	<p>Activate the daemon group on the application server.</p> <p>Note. 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.</p>

Defining a Daemon Group in Process Scheduler

Access the Daemon Group page.

The screenshot shows the 'Daemon Group' configuration page. At the top, it displays 'Daemon Group: BOBASICS' and a 'Load All Programs' button. Below this is a table for managing programs in the daemon group.

*Program Name			
BO_BAS_TRIG			
RAD_CACH_DMN			

Daemon Group page

Daemon Group

Displays the program names for the BOBASICS daemon group, which is the default selection. Real-Time Advisor does not appear 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 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, select the RAD_CACHE_DMN daemon group, which is packaged with Real-Time Advisor. Click the Lookup button to verify that the description is *Cache Computing AE Daemon*.

See Also

[Chapter 3, “Preparing the Real-Time Advisor Environment,” Defining a Daemon Group in Process Scheduler, page 25](#)

Activating the Daemon Group on the Application Server

Access the Server Daemon Details page.

The screenshot shows the 'Server Daemon Details' page. At the top, there are tabs: 'Server Definition', 'Distribution', 'Operation', 'Notification', and 'Daemon'. The 'Daemon' tab is active. Below the tabs, there are two labels: 'Server Name: PS08390' and 'Process Instance:'. Below these is a section titled 'Server Daemon Details'. Inside this section, there are four rows of configuration options:

- 'Daemon Enabled:' followed by an unchecked checkbox.
- 'Daemon Group:' followed by a text input field and a magnifying glass icon.
- 'Daemon Sleep Time:' followed by a text input field and the word 'minutes'.
- 'Recycle Count:' followed by a text input field.

Server Daemon Details page

Daemon Enabled

Select this check box. A daemon process is an Application Engine process that runs continuously when 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* should include the daemon group that you added on the previous page.

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. The *sleep time* is the number of minutes that the daemon process waits before it checks for work. When the process becomes active, it checks for processes that have been run and process that need to be run on the process server.

Note. The sleep time should be less than the dialog refresh (in 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 restarts itself.

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

See Also

Enterprise PeopleTools 8.48 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 Process Scheduler activates the daemon, which periodically updates the Real-Time Advisor cache.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

CHAPTER 4

Setting Up 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

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 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.

A Real-Time Advisor dialog can be triggered through the Prescriptive Analytic Framework (PAF) 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. Instead, the application uses other data stored in the system from Support, the Prescriptive Analytic Framework, and Marketing.

A dialog can also be executed directly from calling applications without the need for Prescriptive Analytic Framework.

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

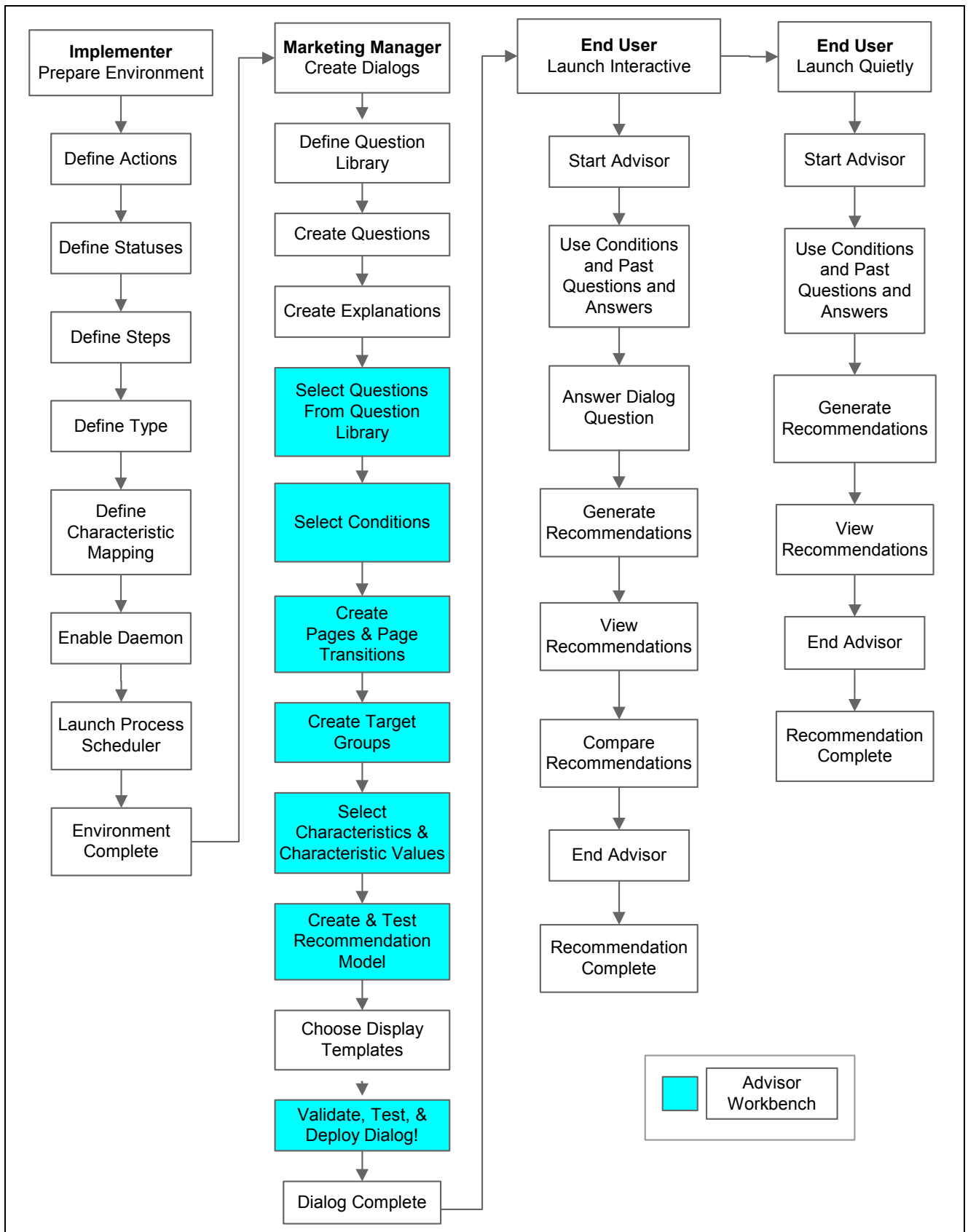
After creating and testing the dialog, you create the display templates that control the look and feel of the dialog, and then you deploy the dialog. Only deployed dialogs are available to use by calling applications.

Real-Time Advisor dialogs consist 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, the Prescriptive Analytic Framework, and Marketing.

Note. PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise 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 Enterprise CRM product data model, and characteristic mappings map to the various records that constitute the PeopleSoft Enterprise CRM product data model.

The following process flow illustrates the 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 Real-Time Advisor, page 101](#)

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_LOOKUP	Open an explanation on the Define Explanation page and then click the View Explanation Usage link.	View the usages of explanations. You need to know which dialogs, if any, are affected by modifications to an explanation. Changes made to an explanation are 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

To define question libraries, use the RAD_QA_LIBRARY component.

Access the Define Question Library page.

Set Up Advisor Question Library

Define Question Library

Use Question Libraries to group questions.

Library Details


*Library Name

Freezer Questions

*Description

Questions for freezer scripts

Questions in this Library

Find | View All |  First 1-9 of 9 Last

Question Name	Question Text	Question Type
FREEZER CUBIC FEET	How many cubic feet would you like in your refrigeration unit?	Numeric
FREEZER USAGE	What are you using the freezer for?	Single Selection
IS SR2000 ON THE ORDER?	{ Recipient First Name:54e71866eca11d88c21 }, is SR2000 on the order	Yes/No
FREEZER LOCATION	Where do you prefer the freezer location on your refrigerator?	Single Selection
FREEZER LIGHTING	What type(s) of lighting will meet your needs?	Multiple Selection
FREEZER UNIT TYPE	What type of cooling unit are you interested in?	Single Selection
FREEZER FLOORING	What type(s) of flooring will meet your needs?	Multiple Selection
FREEZER AVERAGE TEMP	Let's get started! GBI offers cold storage units that vary in temperature range. At which of the following average temperatures (degrees F) do you wish to store your products?	Single Selection
FREEZER FORM FACTOR	What form of freezer are you interested in?	Single Selection

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 with the library.

Note. When you create a new library, no questions appear; however, you can create questions and associate them with the newly created library from the Define Questions component.

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

Defining Questions

To define questions, use the RAD_QUESTION component.

Access the Define Question page.

Set Up a Question

Advisor uses questions to collect information from the user. Be careful when editing existing questions because a question can be used in multiple dialogs.

Question Details

***Question Name** CELL PLAN INCLUDED MINUTES

Explanation Name

***Navigation Text** Included Minutes

***Library** COM01 Cell Plan

Context Name

[View Question Usage](#)

Question Body

***Question Text** What type(s) of minutes do you prefer with your plan?

Merge Terms

Insert Brackets

Define Question page (1 of 2)

Question Type

☐ Yes/No

Default Yes/No

☐ Numeric

Default Number 0.00000

☐ Freeform Text

☐ Single Selection

☒ Multiple Selection

*Answer Name	*Answer Text	Navigation Text	Default		
INCOMING	Free Incoming Minutes	Incoming	<input type="checkbox"/>	+	-
WEEKEND	Night and Weekend Minutes	Night/Weekend	<input type="checkbox"/>	+	-
UNLIMITED	Unlimited Minutes	Unlimited	<input type="checkbox"/>	+	-

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 with 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 Real-Time Advisor Dialogs,” Defining Explanations, page 38.](#)

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 PAF to resolve terms and conditions, and it specifies the information that is needed for the resolution. The context is usually the calling application that uses the dialog where the question is used.
View Question Usage	Click to see which dialogs currently use the 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 (even in deployed dialogs, since questions are not versioned).
Question Body	
Question Text	Enter the question text that the user sees. There is a 245-character limit.
	<hr/> <p>Note. To merge terms into a question text, enter an opening bracket and a closing 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 Merge Terms button is clicked, the application automatically verifies that the entered term exists for the current context. If it does exist, the term is merged; if the text entered is not a valid term, it is cleared and treated as if empty brackets were entered in that place in the question text.</p> <hr/>
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 brackets that have been left blank in the question body.
	<hr/> <p>Note. The user must click the Merge Terms button to embed any terms entered in the question text. Otherwise, any bracketed text is treated as regular text and not an embedded term.</p> <hr/>
Insert Brackets	Click to insert brackets in the question text where you want to insert a term. The empty terms are inserted at the end of the current text.
Question Type	
The question type dictates how the question appears at runtime. If a question is of type <i>Single Selection</i> or <i>Multiple Selection</i> , 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, a drop-down list box is available for the use to select either <i>Yes</i> or <i>No</i> . Enter a default value to appear at runtime.
Numeric	Select to define a question with a numeric answer and to 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 free-form text. The text is stored by the dialog at completion or when saved. Free-form text questions collect information

from the user. Free-form answers cannot be used in transition definitions and target group definitions.

Single Selection

Select to present the user with radio buttons for possible answers under the question. The user can select only one answer from the list.

Multiple Selection

Select to present the user with a grid of answers with a check box adjacent to each answer. The user can select 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 it 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 to display 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.

Define Question				
View Question Usage				
Changing a question which is referenced in a dialog will affect those dialogs. Care should be taken when editing referenced questions. Dialogs that use this question are listed below.				
Question Usage				
Description	Version	Version Description	Question Usage	Version Status
Cellular Service Plans	1	COM01 Cellular Plan Advisor	Shown on Usage page.	Version is no longer used.
Cellular Service Plans	1	COM01 Cellular Plan Advisor	Used in target group INCLUDED INCOMING.	Version is no longer used.
Cellular Service Plans	2	Added changes made to sales servers after 8.8	Shown on Usage page.	Deployed
Cellular Service Plans	2	Added changes made to sales servers after 8.8	Used in target group INCLUDED INCOMING.	Deployed

View Question Usage page

View the dialogs that use a particular question. When you modify a question, you need to know which dialogs are affected by the modification. A change to a question is reflected immediately in all dialogs that use the question.

Question Usage

Description

Displays the name of 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 Real-Time Advisor Environment,” Defining Statuses, page 14.](#)

Defining Explanations

To define explanations, use the RAD_EXPLANATION component.

Access the Define Explanation page.

Set Up Explanation

Define Explanation

Explanations show additional information about a page or a question. Pages can only have explanations of the type, 'Text'.

Explanation Details

***Explanation Name** **Context Name**

[View Explanation Usage](#)

Explanation Type

☒ **Text**

Note: Explanations can include HTML formatting.

☐ **Web URL**

URL

Define Explanation page

Explanations provide insight into elements such as pages and questions, and they offer additional information and context. Two types of explanations exist: text and URL.

Explanation Details

Context Name Select the context to apply. The context is used by the Prescriptive Analytic Framework to resolve terms and conditions and to specify the information that is needed for the resolution. The context is usually the calling application that uses the dialog in which the explanation is referenced.

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

Explanation Type

Text Select to store the explanation in the database as text and display 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 it can include HTML formatting.

Note. To merge terms into an explanation text, enter an opening bracket and a closing 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 automatically verifies that the entered term exists for the current context. If it does exist the term is merged; if the text entered is not a valid term, it is 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 complete the empty term brackets in the explanation body.

Note. The user must click the Merge Terms button to embed any terms entered in the explanation text. Otherwise, any bracketed text is 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 are 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 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 popup window if a user drills into a question for more information.

Viewing Explanation Usage

Access the View Explanation Usage page.

Define Explanation**View Explanation Usage**

Changing an explanation which is referenced in a dialog, question or template will affect those dialogs and any dialogs that use the templates or questions. Care should be taken when editing referenced explanations. Dialogs, Questions and Templates that use this explanation are listed below.

Explanation Usage

Reference Name	Status	Explanation Usage	Version	Version Description
Dialog - Cellular Service Plan	Version is no longer used.	Shown on Family Phone Count page.	1	COM01 Cellular Plan Advisor
Dialog - Cellular Service Plan	Deployed	Shown on Family Phone Count page.	2	Added changes made to sales servers after 8.8
Dialog - Cellular Service Plan	Version is no longer used.	Shown on Additional Features page.	1	COM01 Cellular Plan Advisor
Dialog - Cellular Service Plan	Deployed	Shown on Additional Features page.	2	Added changes made to sales servers after 8.8
Dialog - Cellular Service Plan	Version is no longer used.	Shown on Monthly Charge page.	1	COM01 Cellular Plan Advisor
Dialog - Cellular Service Plan	Deployed	Shown on Monthly Charge page.	2	Added changes made to sales servers after 8.8
Dialog - Cellular Service Plan	Version is no longer used.	Shown on Contract and Charges page.	1	COM01 Cellular Plan Advisor
Dialog - Cellular Service Plan	Deployed	Shown on Contract and Charges page.	2	Added changes made to sales servers after 8.8
Template - COM01 CELL PLANS	Active	Used in the template COM01 CELL PLANS as a default explanation for a page.		
Dialog - Cellular Service Plan	Version is no longer used.	Shown on Usage page.	1	COM01 Cellular Plan Advisor
Dialog - Cellular Service Plan	Deployed	Shown on Usage page.	2	Added changes made to sales servers after 8.8

View Explanation Usage page

View the dialogs, templates, and questions that use an explanation. When you modify an explanation, you need to know which dialogs, questions, and templates are affected by the modification. A change to an explanation is immediately reflected wherever the explanation is used.

Explanation Usage

Reference Name	Displays the name of the dialog, template, or question that uses the 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 into Cell Plan Type

1. Select Tag

GBI offers several categories of service plans. The following provides an overview of each type. If you're not sure which plan type you want, select more than one and then choose a plan based on its features.

- Local -- For users who primarily make local calls from within their local calling area. An excellent option for emergency usage and for children.
- National -- For users on the go. These plans offer free long distance and no roaming charges. All minutes are anytime minutes, so you never have to worry about when you are calling.
- Prepaid -- With prepaid service, you control the amount that can be charged to your phone. No credit cards, no deposit, no credit checks, and no contract.
- Family -- For the modern family on the go. Share your minutes across multiple phones. Includes free mobile-to-mobile minutes within your home calling area.

[Next](#)
[Previous](#)
[Edit Text](#)

2. Select Term to Merge

[Switch to Search Mode](#)

Select Subject Area

- 360 Degree View
- Agreement
- Call Center
- Change Management
- Client Manager
- Correspondence Template Terms
 - Call Center
 - Call Report - Correspondence
 - Comm Accounts and Billing
 - Correspondence: Recipient Dtls**
 - Email Workspace
 - Field Service
 - Individuals
 - People
 - Lead
 - Quote/Order Related
 - Marketing
 - Audience
 - Campaigns
 - Order Capture
 - Organizations
 - Strategic Account Planning
 - System Terms

[Find](#) | [View All](#) First 1-15 of 15 Last

Select Term

[Recipient Role Type ID](#)
[Recipient Name](#)
[Recipient First Name](#)
[Recipient Middle Name](#)
[Recipient Last Name](#)
[Recipient Full Name](#)
[Address Line 1](#)
[Address Line 2](#)
[Address Line 3](#)
[Address Line 4](#)
[Recipient City](#)
[Recipient State](#)
[Recipient Postal Code](#)
[Recipient Person ID](#)
[Recipient BO ID](#)

Merge Terms page

Terms personalize the text that is 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. When the Prescriptive Analytic Framework context is used during runtime, the system resolves the terms with the concepts that they represent for the particular user who runs the Real-Time Advisor dialog. The tree shows 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 merged and to insert brackets for adding 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 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 recommendation 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 the dialog name, description, valid effective dates, and status. The step-by-step process used by the Advisor Workbench tool guides 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 that 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 in advance or leave the explanations blank and add them later.

See Also

[Chapter 3, "Preparing the Real-Time Advisor Environment," page 11](#)

[Chapter 4, "Setting Up Real-Time Advisor Dialogs," Defining Explanations, page 38](#)

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	Create the main elements that constitute a dialog.
Select Questions	RAD_ADVISOR_QAS	Click the Select Questions link on the Advisor Workbench page.	Select 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	<ul style="list-style-type: none"> 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 include 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.
Create a Page	RAD_STATION	<ul style="list-style-type: none"> 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 that 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.	View a snapshot of current pages, page transitions, and transition conditions in the advisor dialog. This indicates the pages that can be reached from a given page.

Page Name	Object Name	Navigation	Usage
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	<ul style="list-style-type: none"> 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.
Select Characteristic Values	RAD_CHAR_VAL	<ul style="list-style-type: none"> 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.

Page Name	Object Name	Navigation	Usage
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.	Read through the dialog as a user would, and view runtime output for the dialog that you have created. Debugging information (such as transition rules and transition reasons) enables you to verify that the dialog works properly.

Working with the Advisor Workbench Tool

To work with the Advisor Workbench tool, use the RAD_ADVISOR component.

Access the Advisor Workbench page.

Save

Workbench Home

Dialog

Freezers

Status

Deployed

Dialog Type

Product Advisor

Start Date

1901-01-01

End Date

2099-12-31

Version

1

Dialog Details

*Dialog Name

Freezers

Advisor Type

Product Advisor

Description

IPROD Freezer dialog

*Display Template

IPROD FREEZERS

External Name

Freezers

Context Name

Version Information

Version Number

1

Last Modified By

sgarcia

Version Description

IPROD Freezer dialog

*Start Date

01/01/1901

Status

Deployed

*End Date

12/31/2099

☒ Deployed

☐ Inactive

[View Dialog Versions](#)

Advisor Workbench page (1 of 2)

Dialog Checklist

1. [Select Questions](#)

7 Questions Selected

2. [Select Conditions](#)

0 Conditions Defined

3. [Layout Pages & Transitions](#)

5 Pages Created

4. [Define Target Groups](#)

15 Target Groups Defined

5. [Select Characteristics](#)

5 Selected Characteristics

6. [Create Recommendation Model](#)

18 of 18 Values are Weighted

7. [Validate Dialog](#)

Validated

8. [Test Dialog](#)

☒ Hide Step Descriptions

Save Dialog

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.

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Advisor Type	<p>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. When you save a dialog, this becomes a display-only field.</p> <hr/> <p>Note. You define advisor types on the Define Type page.</p> <hr/> <p>See Chapter 3, “Preparing the Real-Time Advisor Environment,” Defining Type, page 16.</p>
Display Template	<p>Select the template to use with the dialog. Templates control the look and feel of the runtime environment for the user.</p> <p>See Chapter 5, “Defining Display Templates,” Defining Display Templates, page 86.</p>
External Name	Assign the dialog name that the user sees.
Context Name	<p>Select a context to apply. The context is used by the PAF to resolve terms and conditions, and it specifies the information that is needed for the resolution. The context is usually the calling application that uses the dialog.</p>
Version Information	
Start Date and End Date	Enter dates for the dialog to become valid and invalid.
Status	<p>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.</p> <p>See Chapter 5, “Defining Display Templates,” page 85.</p>
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 indicate how 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 appears 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 the page.

Selecting Dialog Questions

Access the Select Questions page.

Advisor Workbench

Select Questions

Save

Workbench Home

Dialog Freezers

Status Deployed

Dialog Type Product Advisor

Start Date 1901-01-01

End Date 2099-12-31

Version 1

Determine the questions you want to include in the dialog by selecting or creating them from a question library. Answers to these questions will enable you to segment an audience, gather information about them, and determine page flow.

Question Libraries

Find | View All

First 1-5 of 12 Last

Library Name	Description
Home Appliance Library	This will hold all question that pertain to Home appliances
FSI01 Checking Questions	Checking Account Advisor Questions
Cellular	Cellulare Phone
Mobile Questions	Library to house mobile questions
Generic Questions	Generic questions to gain information about the user.

Selected Questions

Question Name	Question Text	
FREEZER CUBIC FEET	How many cubic feet would you like in your refrigeration unit?	
FREEZER USAGE	What are you using the freezer for?	
FREEZER LOCATION	Where do you prefer the freezer location on your refrigerator?	
FREEZER LIGHTING	What type(s) of lighting will meet your needs?	
FREEZER UNIT TYPE	What type of cooling unit are you interested in?	
FREEZER FLOORING	What type(s) of flooring will meet your needs?	
FREEZER FORM FACTOR	What form of freezer are you interested in?	

☐ Use Past Question Answers as Defaults

Save Selected Questions

[Return to Workbench](#)

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 categorize users in 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 is associated with the dialog, only questions that share that context or have no context at all appear in the question libraries for the dialog.

Selected Questions

This region 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 remove or add questions or make other changes to the question list.

Creating, Editing, or Cloning Questions from the Question Library

Access the Question Library page.

Advisor Workbench: Select Questions

Question Library

Workbench Home

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

Select the questions you want to include in the dialog.

Library Information

Question Library Home Appliance Library
Description This will hold all question that pertain to Home appliances

Questions

Select	Name	Question Text	Type		
<input type="checkbox"/>	FRIDGE PRICE	What price would you expect to pay?	Single		
<input type="checkbox"/>	DISHWASHER ANY EXISTING	Do you have any existing dishwashers that you will continue to operate?	Yes/No		
<input type="checkbox"/>	DISHWASHER CYCLES	How many cycles do you prefer for your dishwasher?	Single		
<input type="checkbox"/>	APPLIANCE USAGE	Are you interested in a Commercial or Household?	Single		
<input type="checkbox"/>	DISHWASHER COMPACT	Does the dishwasher need to be compact (i.e., smaller than a standard dishwasher)?	Yes/No		
<input type="checkbox"/>	FRIDGE TYPE	Which refrigerator type best meets your needs?	Single		
<input type="checkbox"/>	STUB TO RETURN	Return to start?	Yes/No		
<input type="checkbox"/>	FINISH TYPE	What finish type do you prefer?	Single		
<input type="checkbox"/>	FRIDGE SIZE	What size of refrigerator do you think you will need?	Single		

Add Selections to List
Create a Question

[Return to Workbench](#)
[Back to Question Selection](#)

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 <i>Yes/No</i> , <i>Single Select</i> , or <i>Multiple Select</i> .
Clone	Click to create a new question with the same elements and save it as a copy.
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 the Set Up a Question page and add a new question.

Defining Conditions

Access the Define Conditions page.

Advisor Workbench

Define Conditions

Workbench Home |

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

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

[Create Condition](#)

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 PAF and the context of the dialog determines the available terms. Conditions can be used in target groups to specify recommendations, and they can be used in transitions to determine the flow of the dialog. A context must be associated with the dialog before creating conditions.

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.

Advisor Workbench: Define Conditions

Create a Condition

Conditions use terms which are external system and user information. The conditions can influence recommendations and the flow of the dialog.

Condition Information

Condition Name

Description

[Switch to Advanced Mode](#)

Term	Operator	Value
Select Term		

First 1 of 1 Last

[+](#) [-](#)

[Done](#) [Cancel](#)

Create a Condition page

Create or edit a condition to include external system and user information. The information encapsulated in terms is available from the PAF. 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 the operator requires one.

Select Term Click to access the Select Term page.

Selecting Terms

Access the Select Terms page.

Switch to Search Mode

Select Subject Area

Find | View All First 1-2 of 2 Last

Select Term

Count of times <Product> installed at customer

Count of times <product group> of <group type> installed at customer

360 Degree View

Agreement

Call Center

Change Management

Client Manager

Correspondence Template Terms

Customer History

Customer Scorecard KPIs

FieldService

Financial Accounts

Individuals

Installed Product

Leads

Marketing

Order Capture

Order History

Organizations

Policy and Claim Presentment

Product Registration

Quality

Sales

Service

Services Plus

SmartViews

Solutions

Strategic Account Planning

System Terms

Task Management

Workers

Select Terms page

Select or search for terms for condition statements. Terms personalize the flow of the dialog, and they can be used for targeting recommendations or determining the flow. The tree shows the available terms for the dialog's context. After a term is selected, the term is entered on the Create a Condition page and the condition statement can be completed by adding an operator and value. Only terms that are available from the associated context will appear in the Select Term page.

Working with Pages and Transitions

Access the Layout Pages & Transitions page.

Advisor Workbench

Layout Pages & Transitions

Workbench Home

Dialog Freezers
Status Edit In Progress
Dialog Type Product Advisor

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

Define the flow of the dialog by creating pages and the transitions between those pages.

Pages & Transitions

Pages	Start Page	End Page	Questions		
Freezer Intro	✓		FREEZER UNIT TYPE		
Fridge Details		✓	FREEZER LOCATION, FREEZER CUBIC FEET		
Freezer Details			FREEZER USAGE, FREEZER FORM FACTOR		
Chest Freezer Details		✓	FREEZER CUBIC FEET		
Walk-In Details		✓	FREEZER LIGHTING, FREEZER FLOORING, FREEZER CUBIC FEET		

Create a Page

Map Page Transitions

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 appears only if there are existing pages in the dialog.

Questions	Displays the questions that 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 receive a warning if the page is referenced elsewhere in the dialog. If you delete the page, you must fix relevant references or the dialog cannot be properly validated. Use the Map Page Transitions button or the Validate Dialog link to view 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.

Advisor Workbench: Layout Pages and Transitions

Create a Page

Save | Workbench Home

Dialog Freezers
Status Edit In Progress
Dialog Type Product Advisor

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

A Page is what is presented to your users. Pages can contain questions, explanations, and available user actions. Use a page's Display Template to override the dialog's Display Template.

Page Information

***Page Name**
Navigation Text
Explanation Name
Display Template

Page Settings ☐ **Start Page**
☐ **End Page**
☐ **Force a Recommendation**

Questions on this Page

Question	Required	
<input type="text"/>	<input type="checkbox"/>	

User Actions

Select	Action
<input type="checkbox"/>	Back
<input type="checkbox"/>	Next
<input type="checkbox"/>	Recommend
<input type="checkbox"/>	Save
<input type="checkbox"/>	View My Answers
<input type="checkbox"/>	Exit
<input type="checkbox"/>	Start Over

Create a Page page

Use this page to create pages for the user. The pages include questions, explanations, and user actions. You can override the dialog template by selecting 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 to have the page appear first in the dialog 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, the system displays 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. For a page, the explanation must be a text explanation. Explanations appear at the top of the page at runtime. The search automatically filters out all non-text explanations.

Display Template Select a display template for the page. You can override the dialog template to give the page a different appearance from other pages in the dialog.

Questions on this Page

Question Select the questions to appear on this page during runtime. You select from the available questions that have been added to the dialog. If you a question does not appear, you can 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 cannot exit the page at 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 is determined on the Define Actions page during Real-Time Advisor environment preparation.

See [Chapter 3, “Preparing the Real-Time Advisor Environment,” Defining Actions, page 13.](#)

See [Chapter 4, “Setting Up Real-Time Advisor Dialogs,” Creating, Editing, or Cloning Questions from the Question Library, page 49.](#)

Creating Page Transitions and Transition Conditions

Access the Create Page Transitions page.

Advisor Workbench: Layout Pages & Transitions

Create Page Transitions

Save | Workbench Home |

Dialog Freezers
Status Edit In Progress
Dialog Type Product Advisor

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

Define the transitions that determine the path a user takes through a dialog.

Page Transition Information

Page Freezer Intro **As the default, go to Page** Fridge Details

Basic [Advanced](#)

Transitions

Transition Number 1 **If the statements below are met, go to Page** Freezer Details

	And/Or	Open	Question / Condition	Operator	Answer	Close		
1			FREEZER UNIT TYPE	Equal To	FREEZER		+	-

Delete Transition

Add a Transition | Validate Syntax | Preview Transitions

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 appears.

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 transitions.

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 that the dialog displays if the transition is successful.
- And/Or** If you select *And*, each statement must be met. If you select *Or*, then either statement can be met for a successful transition.
- Open** Use open parentheses to nest logic. This option is available for advanced transitions 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 returns the value False.
	<hr/> Note. Free-form questions do not appear here. <hr/>
Operator	In Basic mode, the operator is <i>Equal to</i> . All Boolean operators are available in Advanced mode.
Answer	Answers are available for <i>Single-Select</i> , <i>Multiple-Select</i> , and <i>Yes/No</i> 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 closing parentheses to nest logic. This option is 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. The 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 specifies the grid row that needs to be fixed, and the 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.
	<hr/> Note. When you click the Save Transitions button, the Create Transitions button on the Layout Pages & Transitions page becomes an Edit Transitions button for editing existing transitions. <hr/>

Previewing Page Transitions and Transition Statements

Access the Map Page Transitions page.

Advisor Workbench: Map Page Layout

Map Page Transitions

Workbench Home |

Dialog Freezers
Status Edit In Progress
Dialog Type Product Advisor

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

Use the graph below to determine the pages that can be reached from a given page. The default transition is highlighted.

Page Transitions

Page Name		Transition Destination	Default	Transition Statement
Freezer Intro (S)	▶	Fridge Details	✓	
	▶	Freezer Details		If FREEZER UNIT TYPE is Equal To FREEZER then go to the Freezer Details page.
Fridge Details	■	End Page		
Freezer Details	▶	Chest Freezer Details	✓	
	▶	Walk-In Details		If FREEZER FORM FACTOR is Equal To WALK_IN then go to the Walk-In Details page.
Chest Freezer Details	■	End Page		
Walk-In Details	■	End Page		

Map Page Transitions page

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 indicates that the page is no longer valid, and the transition must be fixed before the dialog can be validated.

Default

A green check mark 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 Freezers

Status Edit In Progress

Dialog Type Product Advisor

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	
LARGE FRIDGE			
MEDIUM FRIDGE			
FREEZER USER		<input checked="" type="checkbox"/>	
MEDICAL USAGE			
REFRIGERATOR USER			
FREEZER ON TOP			
FOOD USAGE			
SIDE BY SIDE			
HALOGEN LIGHTING			
FLOURESCENT LIGHTING			
SMALL FRIDGE			
CEMENT FLOORING			
EPOXY FLOORING			
WALK-IN FREEZER			
CHEST FREEZER			

Create Target Group

Define Target Groups page

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 Real-Time Advisor Dialogs," Creating Dialogs Using the Advisor Workbench Tool, page 42.](#)

Create a Target Group

Click to create a target group.

Creating Target Groups

Access the Create a Target Group page.

Advisor Workbench: Define Target Groups

Create a Target Group

Save | Workbench Home

Dialog Freezers
Status Edit In Progress
Dialog Type Product Advisor

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

Target Groups are used to segment users. Create question and answer combinations and conditions to define the Target Group. Relative Value ranks how relevant a group is compared to other Target Groups.

Target Group Details

*Target Group Name

Description

*Relative Value

☐ **Default Target Group**
Note: Target User Weight applies to the Weighting Model.

Target Group Definition Basic [Advanced](#)

And/Or	Open	Question / Condition	Operator	Answer	Answer Input	Close
1		<input type="text"/>	Equal To	<input type="text"/>	0.0000	<input type="button" value="+"/> <input type="button" value="-"/>

Validate Target Group Syntax | Preview Target Group

Save Target Group | [Return to Workbench](#) | [Back to Target Group List](#)

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. The relative value is used as a multiplier during the recommendation process. For example, in the case of product-advising, if users in the target group have predictable buying habits, you can assign the target group a high relative value. If a user belongs to multiple target groups, recommendations are based on the target group with the highest relative value.

Default Target Group

Select to designate 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 designate a default target group for each 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 if you plan to use Advanced target-group mode.

Target Group Definition

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

And/Or	If you select <i>And</i> , each statement must be met. If you select <i>Or</i> , then either statement can be met for a the segment evaluation to be true.
Open	Use opening parentheses to nest logic. Opening 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 the user belongs to 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.
<hr/> Note. Free-form questions do not appear in this list. <hr/>	
Operator	In Basic mode, the operator is <i>Equal to</i> . 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 <i>Single-Select</i> , <i>Multiple-Select</i> , and <i>Yes/No</i> question types. If the question requires a numeric answer, then the Answer Input edit box appears instead of a list of answers. The system compares the user's answers to the answer that you indicate to determine if the user is part of the target group.
Answer Input	For <i>Numeric</i> question types, enter the number for the question answer to use in the question evaluation. The system compares the user's answers to the number to determine if the user is part of the target group.
Close	Use closing parentheses to nest logic. Closing parentheses are only available in Advanced mode.
Validate Target Group Syntax	Click to validate target group logic. The Target Group Errors group box identifies syntax errors so that you can correct them. The target group row indicates the grid row that needs to be fixed, 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.

Advisor Workbench

Selected Characteristics

Workbench Home

Dialog Freezers

Status Edit In Progress

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Version 2

Objects with these characteristic values will be available for recommendation.

Characteristics

Characteristic	Defined Values	Number of Selected Values	
Product ID - IPROD	Selected Values	6	
IPROD Freezer Lighting	Selected Values	3	
IPROD Appliance Usage	Selected Values	3	
IPROD Freezer Flooring	Selected Values	3	
Product Category	Selected Values	3	

Add a Characteristic

Selected Characteristics page

You can view the characteristics and characteristic values that have been added to the dialog and weighted against target groups. They become 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 with types. Characteristics available for one type might not be available for another.

Characteristics

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

Characteristic	Displays the characteristics that have been selected for use in the 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 with 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 Characteristics

Access the Select Characteristics page.

Advisor Workbench: Selected Characteristics

Select Characteristics

Workbench Home

Dialog

Freezers

Status

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Dialog Type

Product Advisor

Start Date

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End Date

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2

Select Values for the characteristic you want to add. Selected characteristics determine which objects are available for recommendation.

Selected Characteristics

Name	Description	
Product List Price		Select Values
Product Width	Width	Select Values
Product Length		Select Values
Product Height		Select Values
Product Group - Catalog		Select Values
IPROD Product List Price		Select Values
Product ID	Product ID	Select Values

Select Characteristics page

Selected Characteristics

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

Select Values

Click to access the Characteristic Value page and select values. After you select values for the characteristic, the characteristic is added to the dialog.

Note. If you cannot find a characteristic, verify that 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 Real-Time Advisor Environment,” Defining Characteristic Mapping, page 19

Creating or Editing Characteristic Values

Access the Select Characteristic Values page.

Advisor Workbench: Selected Characteristics

Select Characteristic Values

Save

Workbench Home

Dialog Freezers
Status Edit In Progress
Dialog Type Product Advisor

Start Date 1901-01-01
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Version 2

Select values for your characteristics. Objects with these characteristic values will be available for recommendation.

Characteristic Information

Characteristic Name Product Width

Characteristic Values

[Check All](#) [Uncheck All](#)

	Value Description
<input type="checkbox"/>	1'
<input type="checkbox"/>	1'7"
<input type="checkbox"/>	1.25"
<input type="checkbox"/>	1.625"
<input type="checkbox"/>	10"
<input type="checkbox"/>	11 inches
<input type="checkbox"/>	12 "
<input type="checkbox"/>	12"
<input type="checkbox"/>	2 feet
<input type="checkbox"/>	2"
<input type="checkbox"/>	2'
<input type="checkbox"/>	2' 10"

Select Characteristic Values page for numeric characteristic

Advisor Workbench: Selected Characteristics

Select Characteristic Values

Save

Workbench Home

Dialog

Freezers

Status

Edit In Progress

Dialog Type

Product Advisor

Start Date

1901-01-01

End Date

2099-12-31

Version

2

Select values for your characteristics. Objects with these characteristic values will be available for recommendation.

Characteristic Information

Characteristic Name

Product ID

Characteristic Values

[Check All](#)
[Uncheck All](#)

	Value Description
<input type="checkbox"/>	0000000000000000036
<input type="checkbox"/>	0000000000000000037
<input type="checkbox"/>	0000000000000000038
<input type="checkbox"/>	0000000000000000039
<input type="checkbox"/>	0000000000000000040
<input type="checkbox"/>	0000000000000000041
<input type="checkbox"/>	0000000000000000042
<input type="checkbox"/>	0000000000000000043
<input type="checkbox"/>	0000000000000000044
<input type="checkbox"/>	0000000000000000045
<input type="checkbox"/>	0000000000000000046
<input type="checkbox"/>	0000000000000000047

Select Characteristic Values page for mapped value types

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

Note. The appearance of the page varies depending on the characteristic type.

Numeric Characteristic Values

These fields appear for numeric types.

From this number and To this number

Enter numeric ranges for the characteristic. The ranges correspond to the groups that you define in the recommendation model. For example, you might enter price ranges here. Objects with the values that you specify here constitute the recommendation pool. You can make as many groupings as you need, and 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 identify the objects that are available for recommendation, and they must distinguish one object from another.

Save Characteristic Values

Click to save the characteristic values for use in the recommendation model.

Creating Recommendation Models

Access the Create Recommendation Model page.

Advisor Workbench

Create Recommendation Model

Workbench Home

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Version 2

Click a weight button to determine the weighting of the corresponding characteristic value . Weightings determine your Weighting Model and subsequently control the recommendations presented.

Characteristics Included in Model

<input type="checkbox"/>	Value Description	Description	Weighted	
<input type="checkbox"/>	D9998	Product ID - IPROD	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	D9999	Product ID - IPROD	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	SR1009	Product ID - IPROD	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	SR1010	Product ID - IPROD	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	SR1011	Product ID - IPROD	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	SR1012	Product ID - IPROD	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	HALO	IPROD Freezer Lighting	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	FLOR	IPROD Freezer Lighting	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	CUSTOM	IPROD Freezer Lighting	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	MED	IPROD Appliance Usage	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	FOOD	IPROD Appliance Usage	<input checked="" type="checkbox"/>	Weight

Create Recommendation Model page (1 of 2)

<input type="checkbox"/>	ALL	IPROD Appliance Usage	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	EPOXY	IPROD Freezer Flooring	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	CEMENT	IPROD Freezer Flooring	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	CUSTOM	IPROD Freezer Flooring	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	Chest Freezers	Product Category	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	Refrigeration	Product Category	<input checked="" type="checkbox"/>	Weight
<input type="checkbox"/>	Walk-Ins	Product Category	<input checked="" type="checkbox"/>	Weight

Graph Selected Values

Test Model

Create Recommendation Model page (2 of 2)

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	Indicates whether 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 to include in the graph, and then click this button to view a graphical representation of the selected characteristics. You can compare the weights of the values based on target groups. This enables you to determine if all of the weights for a given target group are appropriate.
Test Model	Click to access the Test Recommendation Model page to verify and test the model. See Chapter 4, “Setting Up Real-Time Advisor Dialogs,” Testing Recommendation Models, page 70.

Weighting Characteristic Values Against Target Groups

Access the Weight Characteristic Value page.

Advisor Workbench: Create Recommendation Model

Weight Characteristic Value

Save

Workbench Home

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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 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 0. Weightings control the recommendations that are made 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. You score characteristics by determining the importance of the characteristic value to a user in the target group.

Weight

Displays the relative score derived by multiplying the relative value by the score. The recommendation engine uses this final value to determine recommendations for a target group.

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

Calculate and Graph Weightings

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

Note. This step is optional because Real-Time Advisor calculates the weight internally.

Weight Values Graph

Displays a graph of the weights for the value for each 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 Freezers

Status Edit In Progress

Dialog Type Product Advisor

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 10

Minimum Score 0

Control Results

Results Display

☒ 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
<input type="checkbox"/>	LARGE FRIDGE	FREEZER UNIT TYPE Equal To REFER AND FREEZER CUBIC FEET Greater than or Equal 26
<input type="checkbox"/>	MEDIUM FRIDGE	FREEZER UNIT TYPE Equal To REFER AND (FREEZER CUBIC FEET Greater Than 20 OR FREEZER CUBIC FEET Less Than 26)
<input type="checkbox"/>	FREEZER USER	FREEZER UNIT TYPE Equal To FREEZER
<input type="checkbox"/>	MEDICAL USAGE	FREEZER USAGE Equal To MEDICAL
<input type="checkbox"/>	REFRIGERATOR USER	FREEZER UNIT TYPE Equal To REFER
<input type="checkbox"/>	FREEZER ON TOP	FREEZER LOCATION Equal To TOP
<input type="checkbox"/>	FOOD USAGE	FREEZER USAGE Equal To FOOD
<input type="checkbox"/>	SIDE BY SIDE	FREEZER LOCATION Equal To SIDE
<input type="checkbox"/>	HALOGEN LIGHTING	FREEZER LIGHTING Equal To HALOGEN

Test Recommendation Model page (1 of 2)

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Recommendation Results			View All	First	1-10 of 10	Last
Name	Details	Recommendation Score				
Refrigerator,Custom	Product ID: D9999 Refrigerator, Custom Appliance Usage: N/A Category: Refrigeration Freezer Flooring: N/A Freezer Lighting: N/A Catalog Product Group: Refrigerator	60				
26.7 cu ft Refrigerator	Product ID: SR1010 26.7 cu ft Refrigerator Appliance Usage: N/A Category: Refrigeration Freezer Flooring: N/A Freezer Lighting: N/A Catalog Product Group: Refrigerator	50				
21.6 cu. ft. Refrigerator	Product ID: SR1011 21.6 cu. ft. Refrigerator Appliance Usage: N/A Category: Refrigeration Freezer Flooring: N/A Freezer Lighting: N/A Catalog Product Group: Refrigerator	40				

Test Recommendation Model page (2 of 2)

Select the target groups to use when testing the recommendation mode 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 returns a recommendation number, which indicates the number of recommendations based on the selected target groups combined with the limiting factors. If recommendation results exist, they appear in the Recommendation Results scroll area.

Note. You must select at least one target group. Select multiple target groups to view the recommendations that the system makes to a user in 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 you enter 0, the system resets the value 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 Only filter 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 returns the recommendation number, which indicates the number of recommendations based on the selected target groups combined with the limiting factors. If

recommendation results exist, they appear in the Recommendation Results scroll area.

Note. The maximum score is 99999. Scores greater than that value are reset to 99999.

Recommendation Results

When you click the Test Recommendation button, the system displays the recommendation result set. The recommendations correspond to the selected target group and recommendation model.

Recommendation Score The maximum score is 99999. Scores greater than that value are reset to 99999.

Validating Dialogs

Access the Validate Dialog page.

Advisor Workbench

Validate Dialog

Workbench Home |

Dialog Freezers	Start Date 1901-01-01
Status Testing	End Date 2099-12-31
Dialog Type Product Advisor	Version 2

Validation identifies errors or potential problems with the dialog in its current state. You must fix errors in order to test and deploy the dialog.

Validation Summary

Errors Found 0

Warnings Found 1

Results Explanation Validation was successful. There are warnings listed, please review them as they may cause unwanted results when the dialog is run. The dialog can be tested and deployed when ready.

Validation Results

Object Name	Dialog Object Type	Validation Explanation
Freezers	Dialog	Warning: No conditions were found for this dialog.

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*. When the dialog has this status, you can proceed to test and deploy it.

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 problems 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.	You must associate a display template with the dialog to determine its look and feel and to specify 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 include pages that are displayed to the user. To fix this error, access the Layout Pages & Transitions page and create some pages. This error occurs only if the Layout Pages & Transitions page is a required step.
Warning: No pages were found for this dialog.	A valid interactive dialog must include pages that are displayed to the user. To fix this error, access the Layout Pages & Transitions page and create some pages. This warning appears only if the Layout Pages & Transitions page is a shown step.
Error or Warning: No questions were found for this dialog.	Before you can run a dialog in Interactive mode, the dialog must have questions associated with it. To fix this error, access the Select Questions page, select questions, and save the question list. If this page is not available and the dialog involves interactive conversation with the user, you must alter the advisor type. To do so, contact the Real-Time Advisor setup administrator. Note. An error occurs if the Select Questions page is a required step. A warning appears if the page is a shown step but is not required.
Error or Warning: No conditions were found for this dialog.	Some dialogs may require you to associate conditions with them. Conditions incorporate external information to be used in the dialog for transitions and target groups. To fix this error, access the Select Conditions page. Note. An error occurs if the Select Questions page is a required step. A warning appears if the page is a shown step but is not required.
Error: No conditions or questions were found for this dialog.	A dialog must have either questions or conditions associated with it. Without either, the dialog cannot make recommendations or prompt the user for answers. Questions gather information from the user, and conditions incorporate external information. Both can be used in transitions and target groups. Depending on the circumstances, a dialog might require questions, conditions, or both. To fix this error, access either the Select Questions page or the Select Conditions page. If neither page is available, you must alter the advisor type. To do so, contact the Real-Time Advisor setup administrator.

Error or Warning	Solution
Error: No starting page for the dialog.	A valid interactive dialog must include a starting page that is displayed to 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 problem page. If the page is an end page, clear the Next action. If the page is not an end page, clear the End Page check box. Then 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. A 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. Then save the transitions.
Error: Page X, references a page, which was deleted from the dialog.	The page indicated in the error message references 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. Then 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 lacks 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 field labeled <i>If the conditions below are met, go to Page</i> . Select a page in this field, and then save the transitions.
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 enables you to fix the transition by displaying 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 has a transition that references a deleted page. To fix this error, access the Create Page Transitions page. Locate the transition with the <i>(Invalid Value)</i> entry in the field labeled <i>If the conditions below are met, go to Page</i> . Select a page in this field, and 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 has a transition that references a question that has been removed from the dialog. You can add the question to the dialog or modify the transition. To add the question to the dialog, access the Select Questions page, add the question, and save the question list. To modify the transition, access the Create Page Transitions page, locate the transition that references the question, delete the removed question, and save the transition.

Error or Warning	Solution
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 has a transition that references a condition that has been deleted from the dialog. This problem is unlikely, because you cannot delete a condition from Real-Time Advisor if it is used by a transition or target group. However, if the error occurs, you can fix it by either updating the transition to no longer use the missing condition or by creating a new condition and using it in the transition expression. To <i>update</i> the transition to no longer use the condition, access the Create Page Transitions page and locate the transition that is referencing the condition. Either delete or modify the transition, and then save the transition. To create a <i>new</i> condition, 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 references the missing condition, and use the new condition. Then 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; the 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, and then save the page.
Error: Page X, references question Y, which is no longer included in the dialog.	The page indicated in the error message references a question that has been removed from the dialog. You can add the question to the dialog or edit the page to remove the question reference. To add the question to the dialog, access the Select Questions page, add the question, and save the question list. To remove the question reference, access the Create a Page page, remove the reference to the question from the question list, and save the page.
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.	If a dialog allows comparisons of recommendations, the template must include information about which characteristics to show the user. To fix this problem, click the Choose Display Characteristics link on the Define Display Template page and 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 are displayed to the user when a recommendation is made. Select the appropriate check boxes, and save the template.

Error or Warning	Solution
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.	If a dialog makes recommendations, the template must include information about the 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 and 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 are 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.	If a dialog allows comparisons of the recommendations, the template must include information about the 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 and 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 are 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. Then save the target groups.
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 distinguish the recommendation objects and are 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 in which 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. Then 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, which enables you determine the problem. Fix the problem, and save the target group.

Error or Warning	Solution
Error: Question X is used in the target group, but is not being used in the dialog.	To obtain the answer to a question, the question must be displayed to the user on a page. The indicated question is referenced by the target group, but it is not displayed to the user. You can delete the target group or add the question to a page. Access the Define Target Groups page, find the indicated target group, and delete it. Alternatively, access the Create a Page page, and add the question by clicking the Add a Question button and selecting the question. Then 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 references a question that has been removed from the dialog. You can add the question to the dialog or modify the target group. To add the question 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 so that it no longer references the removed question. Then save the target group.
Error: Target group X, references condition Y which is no longer included in the dialog.	The target group indicated in the error message references a condition that has been deleted from the dialog. This problem is unlikely, because you cannot delete a condition from Real-Time Advisor if it is used by a transition or target group. However, if the error occurs, you can fix it either by updating the target group to not use the condition or by creating a new condition and using it in the target group. To <i>update</i> the target group to not use the condition, access the Define Target Groups page and locate the target group that references the condition. Modify the expression to no longer access the missing condition, and then save the target group. To create a <i>new</i> condition, access the Select Conditions page, create the condition, and save it. To update the target group, access the Define Target Groups page. Locate the target group that is references the missing condition, and use the new condition. Save the target group.
Error: There is no default target group defined in the dialog.	A default target group must exist. 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.	The current date must be within the dialog start and end dates for the dialog to run. To correct the warning, edit the start or end date on the Advisor Workbench page.

Error or Warning	Solution
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 either as the starting page or in a transition from 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 that the page is referenced, check the page where it is referenced and verify that 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, click Remove button next to the question, and save the page. To add the question to a page, access the Create a Page page, click the Add a Question button, select the question, and save the page.
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 add the condition to a transition, access the Create Page Transitions page, add the condition to the transition, and save the transition. To add 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 so that it uses 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 include drill class information. This information is used when selecting a recommendation object; it enables the user to view details of the object. The advisor type needs to be edited and the drill class information added. To do so, contact the setup administrator.
Error: Page X is a start page, it cannot have a Back action	Start pages cannot have a Back action. To fix this error, access the Layout Pages & Transitions step and edit the problem page. If the page is a start page, clear the Back action. If the page is not a start page, clear the Start page check box, then save the page.

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

Test Dialog Information

Description Freezers
Display Template IPROD FREEZERS
Runtime Mode Quiet

Pre-populate Environment

[Customize](#) | [Find](#) |

First 1-7 of 7 Last

Question	Question Statement	Answer	Select Multiple	Answer Input
FREEZER CUBIC FEET	How many cubic feet would you like in your refrigeration unit?			<input type="text"/>
FREEZER USAGE	What are you using the freezer for?	FOOD		
FREEZER LOCATION	Where do you prefer the freezer location on your refrigerator?			
FREEZER LIGHTING	What type(s) of lighting will meet your needs?		Select Multiple	
FREEZER UNIT TYPE	What type of cooling unit are you interested in?			
FREEZER FLOORING	What type(s) of flooring will meet your needs?		Select Multiple	
FREEZER FORM FACTOR	What form of freezer are you interested in?			

Test Dialog

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 the 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 the dialog. In Quiet mode, the recommendation results are shown.

Recommendation Results			Customize	Find	View All	First	1-5 of 5	Last
	Name	Details	Score					
1	22.8 cu. ft. Chest Freezer	Product ID: SR1019 Product: 22.8 cu. ft. Chest Freezer Appliance Usage: All Purpose Category: Chest Freezers Freezer Flooring: Freezer Lighting: Catalog Product Group: Chest Freezer	100					
2	17.8 cu. Ft. Chest Freezer	Product ID: SR1020 Product: 17.8 cu. Ft. Chest Freezer Appliance Usage: Food Service Category: Chest Freezers Freezer Flooring: Freezer Lighting: Catalog Product Group: Chest Freezer	100					
3	Walk-In Freezer 5' 10' x 11'	Product ID: SR2000 Product: Walk-In Freezer 5' 10' x 11' Appliance Usage: All Purpose Category: Chest Freezers Freezer Flooring: Epoxy Freezer Lighting: Halogen Catalog Product Group: Chest Freezer	100					
4	Walk In Freezer (7'9" x 11')	Product ID: SR2010 Product: Walk In Freezer (7'9" x 11') Appliance Usage: Food Service Category: Chest Freezers Freezer Flooring: Cement Freezer Lighting: Fluorescent Catalog Product Group: Chest Freezer	100					
5	Custom Build Freezer	Product ID: SR2900 Product: Custom Build Freezer Appliance Usage: All Purpose Category: Chest Freezers Freezer Flooring: Configurable Freezer Lighting: Configurable Catalog Product Group: Chest Freezer	100					

Advisor test dialog: Quiet mode recommendation results (1 of 2)

Debugging Information
Target Groups the User is in based on the Question Answer Log: <ul style="list-style-type: none"> FOOD USAGE
Conditions:
Question and Answer Log: <ul style="list-style-type: none"> FREEZER CUBIC FEET = 0 FREEZER USAGE = Food Service FREEZER LOCATION = FREEZER UNIT TYPE = FREEZER FORM FACTOR =

Advisor test dialog: Quiet mode recommendation results (2 of 2)

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.

Introduction

Greetings! I am the GBI Product Advisor. I am going to ask you a series of questions to help me understand your cold storage solution needs. The information you provide will help me narrow down the products which best suit your needs.

You can view my recommendations at any time by clicking the Recommend button. My recommendations will get more precise as I learn more about your needs.



1. What type of cooling unit are you interested in?

☒ Freezer
 ☐ Refrigerator

Next

Recommend

Save

Exit

Session Information for Freezers Dialog

Path Information:
Freezer Intro

Transition Information:
Start of the dialog.

Transition Rules for Freezer Intro page:

- 1) If FREEZER UNIT TYPE is Equal To FREEZER then go to the Freezer Details page.
- 2) Otherwise go to the Fridge Details page.

Target Groups the User is in based on the Question Answer Log:

- DEFAULT TARGET GROUP (FREEZER USER)

Conditions:

Question and Answer Log:

Advisor Test Dialog page with 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 previously accessed pages.
Transition Information	Displays a summary of the transitions to the current page.
Transition Rules	Displays the page's transition rules, which determine the next page transition.
Target Group the User is in Based on the Question Answer Log	Displays the target groups to which the user belongs, 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 by selecting the Deployed check box on the Advisor Workbench page. Then click the Save Dialog button.

Only deployed dialogs are seen by the calling applications and 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

After 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 creates 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 view 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 version in progress. You can clone or view past deployed versions, and 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 status *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

To work with dialog versions, use the RAD_VERSION component.

Access the Dialog Versions page.

View Dialog Versions

Dialog Versions

The Versions of a dialog are shown in the grid below. From here you can edit the latest version, copy any version, delete the in progress version, or view a past version.

Dialog Specifics

Advisor Dialog Dishwashers

Type Name Product Advisor

Dialog Versions Customize Find First 1-3 of 3 Last

Version	Version Description	Status		
1	Initial Version	Past Deployed		
2	Changed display template	Past Deployed		
3	Changed context to Case. Added condition to Default target group so the dialog will recommend in quiet mode.	Deployed		

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 version in progress.

Cloning Dialogs

Access the Clone Dialog page.

Dialog Versions

Clone Dialog

Make a copy of the selected dialog version. Fill in the pertinent information and select Clone Dialog. A copy of the dialog will be created and control will be transferred to the Advisor Workbench.

Dialog Options

Advisor Name	<input type="text" value="Copy of:Dishwashers"/>	Template Name	<input type="text" value="IPROD APPLIANCES"/>
Description	<input type="text" value="Recommend dishwashers and dishwasher accessories"/>	Start Date	<input type="text" value="01/01/1901"/>
Version Description	<input type="text"/>	End Date	<input type="text" value="12/31/2099"/>
		External Name	<input type="text" value="Dishwasher Advisor"/>

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. The default is the display template of the dialog version that is 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 user. This name can be shown to the end user at runtime.
Clone Dialog	Click to clone the dialog.
Transfer to Cloned Dialog	After the dialog version is cloned, this link appears. Click to access 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 Real-Time Advisor.

Note. This chapter gives dialog creators a sense of the recommendation experience at runtime. It focuses on how display templates determine the runtime experience, and it discusses the effect of selections in the Advisor Workbench tool.

Understanding the Recommendation Experience

Real-Time Advisor integrates directly with several other PeopleSoft applications. It can be invoked directly from PeopleSoft Enterprise Order Capture, Order Capture Self Service, Mobile Order Capture, CRM Catalog, and industry-specific CRM solutions that rely on order-entry functionality or the CRM catalog.

With the addition of the Prescriptive Analytic Framework (PAF), Real-Time Advisor can also be indirectly invoked from PeopleSoft Enterprise Support and HelpDesk cases, the 360-degree view, PeopleSoft Enterprise Marketing activities, Lost and Stolen Handsets, Offer Management, and PeopleSoft CRM Accounts through PAF actions.

The Real-Time Advisor recommendation experience connects dialog creation with user presentation. You can run a session in Quiet mode to generate recommendations by using information already known about a user. Alternatively, you can run a session in Interactive mode, so that the user is asked a series of questions 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. Real-Time Advisor segments users based on their responses to questions and conditions, and it places them in target groups that determine the aspects of the recommended product users are most likely to favor. If a user is not part of a target group and a recommendation is requested, the recommendation engine uses the default target group. Display controls enable the dialog creator to define varied and relevant 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. Real-Time Advisor, through display templates, uses style class definitions to control the appearance of dialog pages. You create style classes in PeopleSoft Enterprise Application Designer. The more style classes that you create before creating Real-Time Advisor display templates, the better. This provides a wide variety of options when designing runtime pages.

You can use the Advisor Workbench Test Dialog functionality (in Interactive mode) to test the style classes and display templates and ensure that the pages are displayed as desired.

Action Handling

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

- Next: Uses transition rules to determine the next page.
- Back: Sets the next page as the page that preceded 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 Real-Time Advisor dialog.
- Save: Saves the current Real-Time Advisor session.

If you have saved during the session, 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).
- Recommend: Sets the next page as the Recommendation page and queries the engine for a set of recommendations based on conditions and the user's answers.
- View Answers: Lists all of the dialog pages with questions and answers.

Users can return 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 8.48 PeopleBook: PeopleSoft Application Designer

Chapter 3, "Preparing the Real-Time Advisor Environment," Defining Actions, page 13

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 with 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 dialogs in Quiet mode require display templates, because the templates define several key controls, such as the recommendation thresholds and the display characteristics. Presentation according to templates enables the interface to vary by dialog or by page, depending on the dialog and page settings. The presentation requires no coding by the user who sets up the dialog. Templates can control these five areas of the interactive experience:

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

Page Controls

Page controls are based on how the dialog presents questions and explanations to users at runtime. These pages constitute the bulk of the user experience; therefore, page controls are important. You can use them to create a custom look for either the dialog or the page, depending on the dialog setup.

When you use the Advisor Workbench tool to add a display template to a page, you can override the dialog template with a page template. You can use this functionality if, for example, you want a particular question-and-answer page to look different from the rest of the dialog.

See [Chapter 4, “Setting Up Real-Time Advisor Dialogs,” Creating Pages, page 54](#).

Display Characteristics

Display characteristics determine the aspects of the recommended object that are displayed 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 for each advisor type. Therefore, you can use a template to create a particular look, and then you can use that template for a variety of 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 then appears to the user as relevant information about the product. This same functionality can be applied to any display-type characteristic. You can also determine which characteristic to show as a link. Links can transfer users to the product details in an application such as the CRM catalog.

Note. You must define the characteristic mappings for display characteristics and the link behavior when you prepare the Real-Time Advisor environment.

See [Chapter 3, “Preparing the Real-Time Advisor Environment,” Defining Characteristic Mapping, page 19](#).

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.	Select 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 that a new template can be created without having to reenter options.

Defining Display Templates

To define display templates, use the RAD_TEMPLATE component.

Access the Define Display Template page.

Define Display Template

[Template Home](#)

Name IPROD FREEZERS	Status Active
----------------------------	----------------------

Display templates are used to control the look and feel of a dialog when it is shown to the user. Use the controls to modify the presentation of the dialog.

Template Details

*Template Name IPROD FREEZERS

*Status Active

Template Setup Steps

[1. Page Controls](#)
Page Controls are used to change the look and feel of individual pages in the dialog runtime.

[2. Recommendation Controls](#)
These controls allow the customization of the recommendations page in the Advisor Runtime.

[3. Compare Controls](#)
These controls change the look and feel of the Compare page in the Advisor Runtime.

[4. View Answer Controls](#)
These controls are used to change the look and feel of the View Answers page.

[5. Choose Display Characteristics](#)
Display Characteristics are used to control what information is shown to the user during Recommendations and Comparisons.

[6. Clone Current Template](#)
Use this step to clone the current template so a new template can be created without having to reenter options.

Define Display Template page

Template Details

Status Select either *Active* or *Inactive*. Only active templates are available in the Advisor Workbench tool when you create 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 run only in Quiet mode because 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 access 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 which display characteristics are shown to users with regard to recommendations and comparisons. This step must be done even for dialogs that run only in Quiet mode because 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 Display Template: Page Controls

Define Page Controls

Save | Template Home

Name IPROD FREEZERS Status Active

Page controls allow you to change what a user of a dialog sees. Control the look and feel by changing the various styleclasses of the page elements.

Page Controls

Page Title GBI Advisor

Image Location Right of Explanation

☐ Show Dialog Title

Default Explanation Freezer Question

☒ Number Questions

☒ Show Page Title

Path Guide Options

☒ Show Path Guide

Edit Link Both Page and Answer

Question Text

Page Edit Link

Question Row PSGRIDODDROWSORTED

☒ Include Break Line After Page

Page Name


Answer Text

Page Row PSGRIDEVENROWSORTED

Break Row PSTEXT

Define Page Controls page (1 of 2)

Style Classes	
Dialog Title	PATRANSACTIONTITLE
Question Box	PSLEVEL1GRID
Explanation	PABOLDTEXT
Action Button Box	
Even Row Answer	PSGRIDEVENROWSORTED
Error Text	
Page Title	PAPAGETITLE
Question	PABOLDTEXT
Action Buttons	
Question Explanation	PABOLDTEXT
Odd Row Answer	PSGRIDODDROWSORTED
Flagged Question	

Default Page Image	
<input type="button" value="Upload Image"/>	
<input type="button" value="Delete Image"/>	

[Return to Template Steps](#)

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 appears by default. There is a 30-character limit.
Default Explanation	Enter a default explanation to use if none is associated with 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 in 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	<p>Select the type of edit link that enables users to review and edit answers on specific pages.</p> <p>Values are:</p> <ul style="list-style-type: none"> • <i>Answer Only</i> • <i>Both Page and Answer</i> • <i>Neither Page nor Answer</i> • <i>Page Only</i>

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 Display Template: Recommendation Controls

Define Recommendation Controls

[Save](#) | [Template Home](#)

Name IPROD FREEZERS **Status** Active

Recommendation controls modify how recommendations are presented to the user and control what elements appear on the Recommendation page.

Recommendation Controls

Page Title
Default Explanation

Image Location
Characteristic Default

☒ **Allow Compare**
☒ **Show Passed Information**

☐ **Show Dialog Title**
☒ **Show Page Title**

Score Display Details

Score Presentation

Score Ranges

From Score	To Score	JPG Image	Browse
<input type="text" value="0"/>	<input type="text" value="0"/>		Browse + -

Recommendation Options

Number to Return
Minimum Score

Control Results

☒ **Use Both**
☐ **Use Score Only**
☐ **Use Number Only**


Define Recommendation Controls page (1 of 2)

Style Classes

Dialog Title
Score
Even Row
Detail Link
Compare Button
Action Buttons

Page Title
Recommendation Box
Odd Row
Recommendation Label
Recommendation
Explanation
Action Button Box

Default Page Image

[Upload Image](#)
[Delete Image](#)


[Save Template](#)
[Return to Template Steps](#)

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: <i>Right of Explanation</i> and <i>Left of Explanation</i> .
Characteristic Default	Enter a value to specify what an empty characteristic shows, if the characteristic value for the recommended object is empty. Use a self-explanatory value such as <i>NA</i> or <i>-</i> .
Allow Compare	Select to enable users to compare recommended objects.
Show Passed Information	At runtime, the calling application may provide 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 Real-Time Advisor when the object is recommended. For instance, the passed information might be the calculated price.
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 <i>Image Range</i> , <i>Normalized List</i> (out of 100), <i>Ranking</i> , and <i>Raw Score</i> .
<hr/> Note. A normalized list takes the highest score to 100 and the lowest score to 0. 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 used only 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 as well as Interactive mode.
-------------------------	--

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 as well as Interactive mode.

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, the number-to-return, and the minimum score are used by dialogs in Quiet mode.

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 environment.

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 Display Template: Compare Controls

Define Compare Controls

Save
Template Home

Name IPROD FREEZERS
Status Active

Compare controls modify how comparisons are displayed to the end user.

Comparison Controls

Page Title Side By Side Comparison

Default Explanation Freezer Comparison

Image Location Right of Explanation

Characteristic Default

☐ Show Dialog Title
☒ Show Passed Information

☒ Show Page Title

Style Classes

Dialog Title PATRANSACTIONTITLE

Page Title PAPAGETITLE

Comparison Box

Detail Link

Even Row PSLEVEL3GRIDODDROW

Odd Row PSSRCHRESULTSODDROW

Criteria PSGRIDCOLUMNHDR


Explanation

Action Buttons

Action Button Box

Default Page Image

Upload Image
Delete Image



Save Template
Return to Template Steps

Define Compare Controls page

Comparison Controls

Page Title	Enter the page title that is 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 <i>Right of Explanation</i> and <i>Left of Explanation</i> .
Characteristic Default	Enter a value to specify what an empty characteristic shows if the characteristic value for the recommended object is empty. Use a self-explanatory value such as <i>NA</i> or <i>-</i> .
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 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 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 environment.

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 90](#)

[Chapter 5, “Defining Display Templates,” Defining Recommendation Controls, page 92](#)

Defining View Answer Controls

Access the Define View Answer Controls page.

Define Display Template: View Answer Controls

Define View Answer Controls

Save
Template Home

Name IPROD FREEZERS
Status Active

View Answers controls determine how the View Answers page behaves, as well as how it appears to the end user.

View Answer Controls

Page Title Your Answers

Default Explanation View Answers

Image Location Right of Explanation

☒ Show Page Title

☐ Show Dialog Title

Style Classes

Dialog Title PATRANSACTIONTITLE

Page Title PAPAGETITLE

Page Box PAGROUPBOX

Page Navigation Text

Question PABOLDTEXT

Answer PSTEXT

Action Buttons

Action Button Box

Explanation PABOLDTEXT

Default Page Image

Upload Image
Delete Image



Save Template
Return to Template Steps

Define View Answer Controls page

View Answer Controls

Page Title	Enter the page title that is 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 <i>Right of Explanation</i> and <i>Left of Explanation</i> .
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 environment.
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

Display Characteristics for Advisor Types

This scroll area may have multiple advisor types listed. Set up the display characteristics for each advisor type that can use this template. Display characteristics defined here are used by dialogs in Quiet mode. The first 10 advisor types are displayed; use the scroll area controls to move to others. The information that you set up here is also needed for dialogs that run in Quiet mode because it determines the recommendation set that the system returns.

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 it 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 it 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 and 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.

Define Display Template: Clone Template

Clone Current Template

Save | Template Home

Name IPROD FREEZERS	Status Active
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Cloning a template allows you to create a new template while copying the options that have already been set up in the current template.

Cloned Template

Template Name

Status

Clone Template

Selected Options

- ☒ Page Controls
- ☒ Recommendation Controls
- ☒ Compare Controls
- ☒ View Answer Controls
- ☒ Display Characteristics

[Return to Template Steps](#)

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 Real-Time Advisor

This section provides an overview of the Real-Time Advisor runtime environment and discusses how to:

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

Understanding the Real-Time Advisor Runtime Environment

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

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

Note. Order Capture enables the customer service representative (CSR) to activate Real-Time Advisor session information. This feature enables the CSR to view session debugging information when running a dialog for a customer. By default, session information is disabled. This option is available on the Order Capture Business Unit Definition page.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Defining Order Capture Business Units”.

When you run Real-Time Advisor, a start page containing questions appears. Users answer questions and have several available options; these are determined by the dialog creator, who adds 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 they can continue to access information about the object by viewing the details of the recommended object. The Real-Time Advisor runtime engine determines the next page depending on the user action and transitions, and it may perform calculations relevant to the recommendation model. You determine such calculations when you use the Advisor Workbench tool during setup.

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

- Question-and-answer.
- Recommendation.
- Compare.
- View question-and-answer.

See [Chapter 5, “Defining Display Templates,” Defining Display Templates, page 86](#).

When you first initialize the runtime engine, Real-Time Advisor checks some characteristics of the dialog before allowing it to run. First, it verifies that a deployed version of the dialog is active. Next, the system verifies 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 the PAF, and it delivers recommendations to the calling application. In Interactive mode the dialog is run and the user is presented with the Real-time Advisor runtime environment as determined by the dialog settings and the display templates.

Pages Used to Run Real-Time Advisor

Page Name	Object Name	Navigation	Usage
Introduction, <Question-and-Answer>	RAD_ADVISOR_RUN	<ul style="list-style-type: none"> Click the Product Advisor links in one of the calling applications. Examples include, the link labeled <i>Need help choosing a product?</i> in Order Capture Self Service, and the Get Recommendations link in Order Capture. Run Real-Time Advisor from PeopleSoft Enterprise CRM applications. Test the dialog from the Advisor Workbench tool. 	Answer questions and proceed through a dialog. Depending on the dialog, you may be able to access a recommendation or view debugging information.
View Answers	RAD_ADVISOR_RUN	<ul style="list-style-type: none"> Click the Product Advisor, PeopleSoft Advisor, or Advisor link in PeopleSoft Enterprise CRM self-service applications. Run Real-Time Advisor from 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	<ul style="list-style-type: none"> Click the Product Advisor, PeopleSoft Advisor, or Advisor link in PeopleSoft Enterprise CRM self-service applications. Click the Recommend button. Test the dialog from the Advisor Workbench tool. 	View recommendations returned by the Real-Time Advisor recommendation engine.

Page Name	Object Name	Navigation	Usage
Compare Selected Products	RAD_ADVISOR_RUN	<ul style="list-style-type: none"> Click the Product Advisor, PeopleSoft Advisor, or Advisor link in PeopleSoft Enterprise CRM self-service applications. Run Real-Time Advisor from 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 Real-Time Advisor

Access the Introduction page.

Introduction page

Depending on the template controls for the dialog and the page contents, the following 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 use for the page or dialog.

Note. Session information may appear at the bottom of the page, depending on how Real-Time Advisor is called. The session information appears if the session is run from the Advisor Workbench tool or if the calling application requests the session information.

See Chapter 5, “Defining Display Templates,” Understanding the Recommendation Experience, page 85.

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.

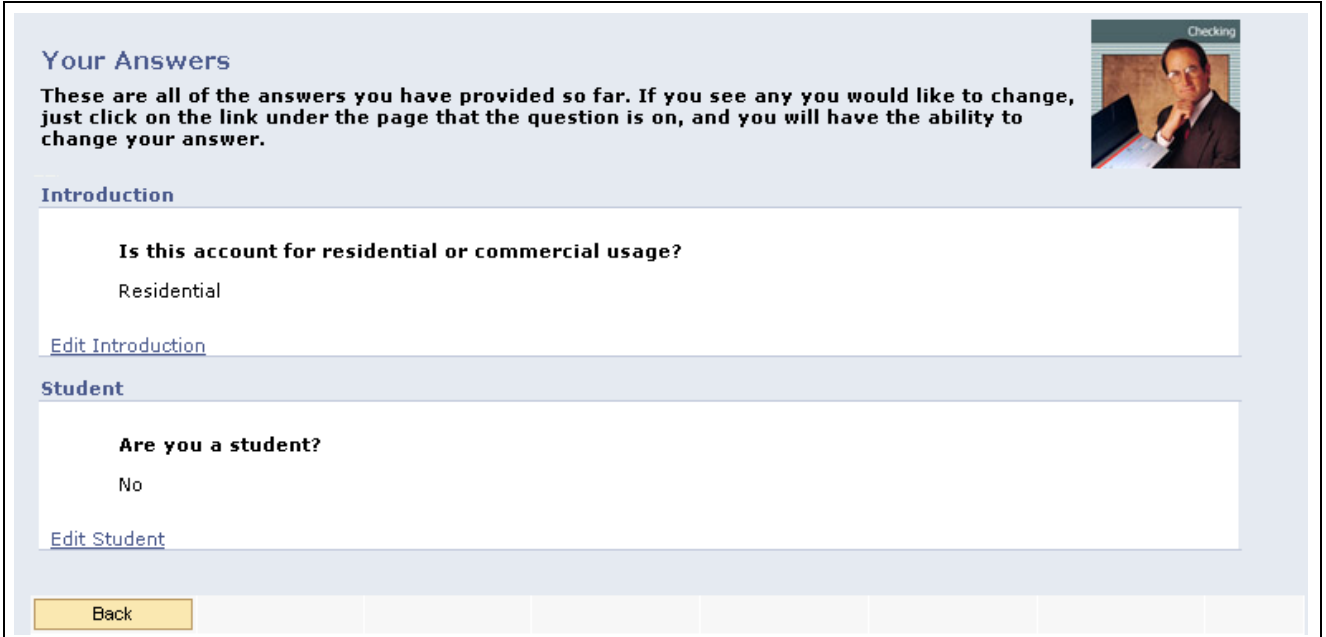
Note. The page title is variable. You determine it while working with the Advisor Workbench tool in the Layout Pages and Transitions step. If you do not set it there, it is defined in the template.

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 Real-Time Advisor from 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 review and modify 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 before the current page.

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

Viewing and Editing Answers

Access the View Answers page.



Your Answers

These are all of the answers you have provided so far. If you see any you would like to change, just click on the link under the page that the question is on, and you will have the ability to change your answer.

Introduction

Is this account for residential or commercial usage?

Residential

[Edit Introduction](#)

Student

Are you a student?

No

[Edit Student](#)

[Back](#)

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 preceding page.

Viewing Recommendations

Access the Recommendations page.

Recommendations

Here is a list of the account types that best meet your needs based on the information you have provided thus far. You can view the details of a particular recommendation by clicking on the link.



Compare	Description	Details	Success Rate
<input type="checkbox"/>	ATM Checking	ATM Checking Checking Account: 000000000000000037 Supports on-line banking: No Pay By Phone: Yes Earns Interest: No	★ ★ ★ ★ ★
<input type="checkbox"/>	Regular Checking	Regular Checking Checking Account: 000000000000000038 Supports on-line banking: Yes Pay By Phone: Yes Earns Interest: No	★ ★ ★ ★ ★
<input type="checkbox"/>	Premium Interest Checking	Premium Interest Checking Checking Account: 000000000000000039 Supports on-line banking: Yes Pay By Phone: Yes Earns Interest: Yes	★ ★ ★ ★ ★

Compare Selected

Back

Next

Exit

Recommendations page

Recommendations


- Compare** Select the check boxes for each recommended object that you want Real-Time Advisor to compare.
- 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 appear in this column are determined by the 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. The Real-Time Advisor engine compares the recommended objects using a variety of data.

Comparing Recommended Products, Services, or Solutions

Access the Compare Selected Products page.

Side-By-Side Comparison

Here are the checking account types you have selected to compare side-by-side. Once you find the one that is right for you, click on that account to view additional details and add it to your order.



Comparisons

Description	ATM Checking	Regular Checking
Checking Account	00000000000000000037	00000000000000000038
Description	<div align = left>ATM checking provides the customer with services provided by the ATM machine. A fee will be charged for branch visits.</div>	<div align = left>Regular checking is the standard account with unlimited checks and branch visits. </div>
Supports on-line banking	No	Yes
Pay By Phone	Yes	Yes
Earns Interest	No	No
Monthly Fee	5	7.5
Balance to Waive Fee	1000	5000
Teller Fee	\$2 per transaction	\$4.00 per transaction
Free Calls	3	6

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 displayed characteristics and their format are determined by the display template for the dialog.

Saving Dialogs

Access the Save Dialog page.

Checking Account Advisor

Save Dialog



Please name the dialog session.

Account Selection

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 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.

Glossary of PeopleSoft Enterprise 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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise 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	<p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p>
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise 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 Enterprise 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.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise 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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise 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 process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
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 Enterprise 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.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Enterprise 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.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
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 Enterprise 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 Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
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 <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
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, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise 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.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.

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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise 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 Enterprise. 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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
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	<p>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.</p> <p>In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.</p> <p>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.</p>
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-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
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.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
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	<p>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.</p> <p>In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.</p>
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.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollout structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division	<p>In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>
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 Enterprise 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 Enterprise 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 <i>Enterprise Incentive Management ledger</i> . 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 Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise 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 Enterprise 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.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	<p>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.</p> <p>In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing	In PeopleSoft Enterprise 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 Enterprise 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.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
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 Enterprise 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.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise 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 Enterprise 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, and user interaction objects.
incentive rule	In PeopleSoft Enterprise 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 Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise 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 Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise 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 <i>rates</i>) 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.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a

	common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise 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 <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise 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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise 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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise 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 SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs.
metastring	Metastings are special expressions included in SQL string literals. The metastings, 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 Enterprise 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 Enterprise 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.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
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 Enterprise and non-PeopleSoft Enterprise 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 <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise 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 Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure 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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise 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 Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise 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.

primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise 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	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
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 <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
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 Enterprise 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 <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
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.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
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 Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>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.</p>
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 Enterprise 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 Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise 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.
speed key	See <i>communication key</i> .
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.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise 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 Enterprise 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 <i>basis</i> 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 Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
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.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise 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 Enterprise Projects.

trace usage	In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
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 Enterprise 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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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 <i>value-added tax exception</i> . 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 <i>value-added tax exempt</i> . 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 <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Enterprise 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.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise 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 link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.
yield by operation	In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . 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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