# (20D) Introduction to Intelligent Advisor

Oracle CX Sales and B2B Service

| DURATION | MODULES | COURSE CODE |
| --- | --- | --- |
| **1 Days** | **10 Lectures** | **—** |

## Course Overview

Introduces the skills &tools for capturing, analyzing, publishing, &maintaining policies.

## What You Will Learn

- 1 Introduction
- Objectives
- What Is Oracle Intelligent Advisor?
- Oracle Intelligent Advisor Components
- Oracle Policy Modeling: Overview
- Oracle Policy Modeling: Rules
- Oracle Policy Modeling: Interviews
- Oracle Policy Modeling: Explanations
- Oracle Policy Modeling: Testing
- Oracle Policy Modeling: Personalized Advice
- Oracle Intelligent Advisor Hub
- Oracle Intelligent Advisor Integration
- Intelligent Advisor Roles
- How Is Intelligent Advisor Used?
- Summary
- 2 Getting Started
- Objectives
- Video Tutorial
- Summary
- Practice 2-1: Getting Started
- 3 Policy Modeling User Interface
- Objectives
- The Policy Modeling User Interface
- The Project Tab
- The Rules Tab
- The Data Tab

- The Interview Tab
- Running the Interview
- Finding Project Information and Further Help
- Opening an Example Project
- Summary
- Practice 3-1: Opening and Navigating an Example Project
- 4 Attributes
- Objectives
- Attributes
- Attribute Types
- Using Attributes in Rules
- Attribute Phrasing
- Boolean Attributes: Things to Remember
- Selecting the Correct Verb
- Text for Other Attributes
- Setting the Attribute Type
- Selecting the Correct Attribute Type
- Attribute Names
- Summary
- 5 Rules
- Objectives
- What Is a Rule?
- Rule Structure
- Connections Between Conditions
- Using Connections
- Rule Structure: Alternative Conclusion
- Linking Rules
- Attribute Levels and Rule Hierarchy
- Summary
- 6 Modeling and Styles
- Objectives
- Oracle Policy Modeling and Styles
- Using Additional Rule Levels
- Viewing Styles
- Using Styles
- Applying Conclusion Styles
- Applying Condition Styles
- Leaving Blank Lines
- Validating and Testing Rules
- Summary
- Practice 6-1: Applying Styles
- 7 Using the Rule Assistant
- Objectives
- Using the Rule Assistant
- Using the Rule Assistant to Create Rules
- Using the Rule Assistant to Create Conditions

- Reusing Attributes Using the Rule Assistant
- Navigating Rules Using the Rule Assistant
- Editing Rules Using the Rule Assistant
- Validating and Testing Rules
- Writing Rules: Personal Choice
- Summary
- Practice 7-1: Using the Rule Assistant
- 8 Creating Interviews
- Objectives
- Interviews
- Designing Interviews
- The Role of Stages
- Creating Stages
- Creating Screens
- Ordering Screens and Stages
- Naming Screens
- Adding Text to a Screen
- Changing the Appearance of Screen Text
- Collecting Information
- Editing Questions
- Choosing How Data is Collected
- Providing Answer Values
- Displaying a Result
- Debugging
- Summary
- Practice 8-1: Creating Interviews
- 9 Introduction to the Intelligent Advisor Hub
- Objectives
- Intelligent Advisor Hub: Overview
- Intelligent Advisor Hub: User Roles
- Intelligent Advisor Hub: Workspaces
- Intelligent Advisor Hub: Interface
- Intelligent Advisor Hub: Deployments
- Intelligent Advisor Hub: Deployment Metrics
- Intelligent Advisor Hub: Deployment Detail
- Intelligent Advisor Hub: Projects
- Intelligent Advisor Hub: Connections
- Project Collaboration Via the Hub
- Summary
- 10 Beyond the Basics
- Objectives
- Key Terms: Summary
- Projects
- Rules and Attributes
- Extending Rules
- Extending Attributes: Data Mapping

- Interviews
- Extending Interviews
- Testing
- Extending Testing: Test Cases
- Examples
- Customizing and Extending Intelligent Advisor
- Summary