

20D: Intelligent Advisor Policy Modeling for Experts Ed 3

Oracle CX Sales and B2B Service

DURATION

3 Days

MODULES

21 Lectures

COURSE CODE

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Course Overview

Advanced Policy Modeling rules & tools, reasoning, data mapping & validation.

What You Will Learn

Reviewing Policy Modeling Concepts

- Objectives
- Course Structure: Policy Modeling for Experts
- What Is Oracle Intelligent Advisor?
- Oracle Intelligent Advisor Components
- Oracle Policy Modeling Overview
- Oracle Policy Modeling: Rules
- Oracle Policy Modeling: Attributes
- Oracle Policy Modeling: Interviews
- Creating Screens
- Collecting Information
- Debugging
- Oracle Intelligent Advisor Hub
- Summary
- Topic 1 Practices

Conclusions and Conditions

- Objectives
- Identifying Conditions in Source Material
- Identifying Conditions in Source Material Example
- Example Solution – each sentence a separate, positive statement
- Networks of Rules
- Summary
- Practices for Topic 2

Negations and Linking Rules

- Objectives
- Writing Rules in the Negative
- Avoiding Multiple Conclusions
- Summary
- Topic 3 Practices

Grouping Operators and Intermediate Attributes

- Objectives
- Using a Combination of AND and OR
- Using Grouping Operator: All
- Using Grouping Operator: Any
- Placing Grouping Operators in Rules
- Using Intermediate Attributes
- Summary
- Topic 4 Practices
- 5a Testing Rules Part 1: Using the Debugger
- Objectives 5a-2
- Verifying Rules 5a-3
- Debugger and Unit Testing 5a-4
- Using the Debugger 5a-5
- Data Tab 5a-6
- Data Tab Actions 5a-7
- Setting Input Values 5a-8
- Viewing the Inferred Attributes (Data View) 5a-9
- Decision tab 5a-10
- Interview tab 5a-11
- Interview tab: Screen List 5a-12
- Interview tab: Understanding Behavior 5a-13
- Navigating to Rules from the Debugger 5a-14
- Re-testing after making changes 5a-15
- Summary 5a-16
- Topic 5 (Part 1) Practices 5a-17
- 5b Testing Rules Part 2 – Using Test Cases
- Objectives 5b-2
- Using Test Cases 5b-3
- Creating Test Case Documents 5b-4
- Test case structure 5b-5
- Test case structure: Description 5b-6
- Test case structure: Test Case ID 5b-7
- Test case structure: Input attributes 5b-8
- Test case structure: Expected values 5b-9
- Test case structure: Actual values 5b-10
- Setting up test case columns 5b-11

- Creating Test Cases 5b-12
- Running Test Cases 5b-14
- Running Test Cases: Results 5b-15
- Debugging Incorrect Test Case Results 5b-16
- Keeping Values to Show Changes over Time 5b-17
- Charting Results 5b-18
- Summary 5b-19
- Topic 5 (Part 2) Practices 5b-20

Comparisons in Rules

- Objectives
- Introduction
- Using Non-Boolean Attributes in Conditions
- Comparison Operators
- Using Values in Rules
- Example 1
- Example 2
- Summary
- Topic 6 Practices
- 7a Calculations in Rules Part 1: Arithmetic Calculations
- Objectives 7a-2
- Methods for Calculating Non-Boolean Attributes 7a-3
- Assigning a Value 7a-4
- Reminder: Using Values in Rules 7a-5
- Standard Arithmetic 7a-6
- Common Arithmetic Functions 7a-7
- Example 7a-8
- Summary 7a-16
- Topic 7 (Part 1) Practices 7a-17
- 7b Calculations in Rules Part 2: Using Functions in Rules
- Objectives 7b-2
- Methods for Calculating Non-Boolean Attributes 7b-3
- Using Functions in Rules 7b-4
- Examples of Intelligent Advisor Functions 7b-5
- ♦♦Is there a function for... ?” 7b-6
- Examples 7b-7
- Special Functions 7b-8
- Using the Rule Assistant to Write Function Rules 7b-9
- Walkthrough: Writing a Function Rule 7b-10
- TIP: Keep it Simple! 7b-14
- Summary 7b-15
- Topic 7 (Part 2) Practices 7b-16

Rule Tables in Word

- Objectives

- Conditional Calculations
- Alternative Conclusions
- Structure of Rule Tables
- Condition Order in Rule Tables
- Writing Rule Tables – With Rule Assistant
- Writing Rule Tables – Without Rule Assistant
- Modifying and Deleting Rule Tables
- Summary
- Topic 8 Practices

Practicing Writing Rules Recap

- Objectives
- Writing Rules
- Writing Rules in the Negative
- Using Grouping Operators
- Using Intermediate Attributes
- Using Non-Boolean Attributes in Conditions
- Comparison Operators
- Using Values in Rules
- Calculations
- Examples of Intelligent Advisor Functions
- Conditional Calculations
- Testing Rules
- Summary
- Topic 9 Practices

Rule Tables in Excel

- Objectives
- Getting Started in Excel
- Using Non-Boolean Attributes: Declarations
- Using Boolean Attributes
- Styles Used for Declarations
- Styles Used for Rule Tables
- Alternative Conclusions in Excel
- Applying Styles
- Creating Rule Tables
- Multiple Conditions
- Incomplete Cells
- Comparisons
- Specifying a Range
- Merged Cells
- How to Merge Cells
- Multiple Conclusions
- Legend Keys (Abbreviations)
- Legend Keys for Boolean Attributes

- Choosing Whether to Use Word or Excel
- Summary
- Topic 10 Practices

Entities

- Objectives
- Introduction
- What is an Entity?
- Entity Types: Global
- Entity Instances
- Entity Instances: Example
- How to Create Entities
- Identification Attributes
- Using Entity Attributes in Rules
- Checking Entity Level
- Writing Entity Rules
- Testing Entity Rules
- Summary
- Topic 11 Practices

Relationships

- Objectives
- Introducing Relationships
- Relationship Components
- Source Entity
- Target Entity
- Relationship Type
- Relationship Text
- Relationships in Policy Modeling
- Creating Additional Relationships in Policy Modeling
- Reverse Relationships
- Self-Referential Relationships
- Inferred Relationships and Entities
- Testing Relationships
- Summary
- Topic 12 Practices

Reasoning with Entities

- Objectives
- Prerequisites
- Some Examples Where Reasoning with Entities is Useful
- Rule Entity Levels
- Identifying Entity Level Attributes
- Identifying Entity Level in Rules

- Proving an Entity Attribute from a Global Attribute
- Proving a Global Attribute from an Entity Attribute
- Using ForAll and Exists
- Using the ForAll Operator
- Using the Exists Operator
- Using ForAll and Exists: Example 1
- Using ForAll and Exists: Example 2
- Using ForAll and Exists: Example 3
- Using ForAll and Exists for Multiple Conditions
- Using ForAll and Exists: Example 4
- Natural Language Forms
- Entity Functions
- Using the Rule Assistant with Entity Functions
- Reminder: Using Values in Rules
- Summary
- Topic 13 Practices

When to Use Entities Review

- Objectives
- Deciding When to Use Entities
- Creating Entity-Level Attributes
- Writing Rules with Entities
- Summary
- Topic 14 Practices

Entity and Relationship Screens

- Objectives
- Entity and Relationship Terminology Refresher
- Collecting Entity Instances
- Collecting Entity Data
- Changing the Orientation of Entity Collection
- Creating Blank Instances
- Changing the Text of the Add/Remove Instance Buttons
- Entity-specific Screens
- Using Entity-Specific Values on Screens
- Using the Attribute Value in the Screen Title
- Identifying Instances belonging to Relationships
- Adding Relationships to Screens
- Adding Filters to Relationship Collection
- Testing Entity and Relationship Collect Screens
- Testing Entity-Level Screens
- Summary
- Topic 15 Practices

Reviewing Entities and Relationships

- Objectives
- What is an Entity?
- Entity Instances
- What is a Relationship?
- Creating Entities
- Relationships in Policy Modeling
- Using Entity Attributes in Rules
- Using Relationships in Rules
- Entity Functions
- Collecting Entity Instances
- Debugging Entity and Relationship Screens
- Summary
- Topic 16 Practices

Improving Attribute Text

- Objectives
- Introduction
- Nouns
- Substitution Attributes
- Pronouns
- Verbs
- Adding a new verb
- Changing Sentence Forms
- Adverbs
- Articles
- Choosing Attribute Tense
- Unusual Sentence Forms
- Overriding Attribute Text
- Attribute Naming Conventions
- Capitalization
- Summary
- Topic 17 Practices

Data Validation

- Objectives
- Validating Input Data
- Methods for Validating Input Data
- Input Validation in the Edit Attribute Dialog
- Input Validation for Text Attributes
- Example Regular Expressions
- Error Rules
- Warning Rules
- Choosing When Errors and Warnings Appear

- Making Error and Warning Rules More Meaningful
- Viewing Input Validation in the Debugger
- Viewing Validation in the Debugger Without Interviews
- Summary
- Topic 18 Practices
- 19a Explanations and Audit Reports Part 1: Explanations
- Objectives 19a-2
- Report on a Decision 19a-3
- Explanations 19a-4
- Adding an Explanation to a Screen 19a-5
- Explanation Screen Appearance 19a-6
- Adding an Explanation to a Form 19a-7
- Hiding Attributes in the Explanation 19a-8
- Marking Attributes as Silent or Invisible 19a-9
- Viewing Decisions in the Debugger 19a-10
- Summary 19a-11
- Topic 19 Part 1 Practices 19a-12
- 19b Explanations and Audit Reports Part 2: Audit Reports
- Objectives 19b-2
- Audit Reports 19b-3
- Creating Audit Reports 19b-4
- Summary 19b-5

Introduction To Forms

- Objectives
- What are Forms?
- Form Templates
- Creating Forms: Preparation
- Creating a New Form
- Creating Form Content
- Creating Form Content: Using Policy Model Data
- Using Policy Model Data: Step 1
- Using Policy Model Data: Step 2
- Using Policy Model Data: Advanced
- Forms: Summary of Features
- Adding Forms to Screens
- Saving Forms
- Testing Forms Available to End Users
- Testing Forms Saved on Submit
- Previewing Forms
- Summary
- Topic 20 Practices

Using Intelligent Advisor in Other Languages

- Objectives

- Language Support in Intelligent Advisor
- Authoring Policy Models in Other Languages
- Deploying Interviews in Other Languages
- Adding Translations
- Using Translated Interviews
- Testing a Translated Interview
- Deploying and Running a Translated Intelligent Advisor interview
- Summary
- Topic 21 Practices

Data Mapping

- Objectives
- Introduction
- Input Mapping
- Output Mapping
- Connecting to another Application
- Intelligent Advisor Hub Connections
- Connecting Policy Modeling to an Intelligent Advisor Hub
- Selecting a Connection
- Specifying the Mapping Settings
- Mapping Data: Entities
- Mapping Data: New Attributes
- Mapping Data: Existing Attributes
- Mapping Data: Using Value Lists
- Interview Submit
- Saving Other Interview Assets
- Choosing When to Load Data
- Testing Interviews with Mapped Data
- Testing Interviews with Dynamically Mapped Data
- Working with Complex Data Models
- Summary

Enhancing Interviews

- Objectives
- Introduction
- Understanding Interview Behavior
- Displaying Screens: Default Behaviour
- Displaying Screens
- Showing and Hiding Screen Controls
- Showing and Hiding Screen Controls: Advanced
- Showing Attribute Values on Screen
- How to Show Attribute Values on Screen
- Showing Attribute Values on Screen: Advanced
- Creating more personalized attribute text
- How to Personalize Attribute Text

- Using Gender
- Displaying Advice
- Displaying Advice on End Screens
- Interview Buttons
- Interview Styles
- Value Lists
- Using a Value List
- Screen Controls
- Using Defaults
- Using html to Enhance Screen Controls
- Summary
- Topic 23 Practices

Policy Modeling for Experts Consolidation Practice Overview

- Objectives
- Prerequisites
- Summary
- Topic 24 Course Consolidation Practice