Oracle® Customer Success

Oracle AI Success Navigator User Guide

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Oracle Customer Success Oracle AI Success Navigator User Guide, Release 26.1

G10196-51

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Preface

This preface describes the document accessibility features and conventions used in Success Navigator Program.

Purpose Statement

The **Oracle AI Success Navigator User Guide** describes how to use Oracle AI Success Navigator (Success Navigator) to manage customer journeys with the included leading practices and actionable guidance.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit Oracle Accessibility Program.

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Overview of Oracle AI Success Navigator

Oracle AI Success Navigator is an interactive digital platform that provides your organization with a clear roadmap to help you optimize your cloud transformation. Success Navigator equips you with the tools you need to thrive in the cloud, including preconfigured Starter Configurations, implementation guidance, key milestone tracking, insights on regular Oracle updates, Adoption Centers supporting innovation, Oracle Modern Best Practice and Key Features, and more.

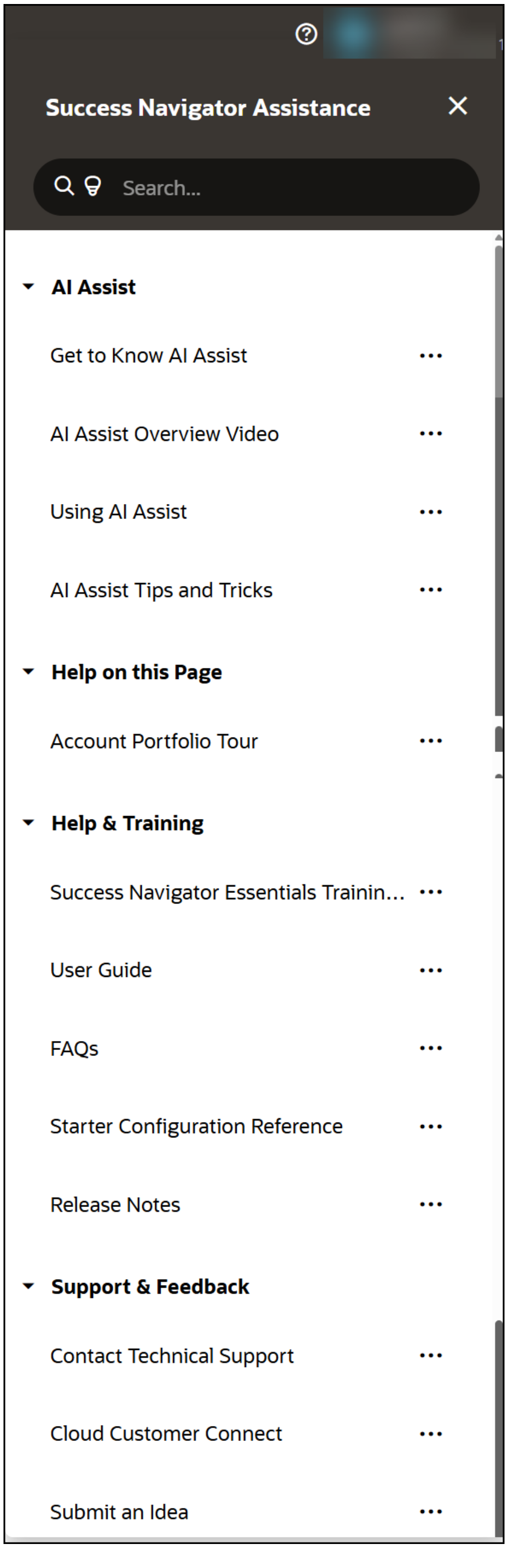
- Get Help
- Web Browser Requirements
- Documentation Accessibility

Get Help

There are several ways to learn more about Success Navigator, get support, and interact with Oracle and other users.

Get Help in Success Navigator

Success Navigator provides various options to get help, including from the help menu at the top right of the application and AI Assist . The help menu includes consolidated access to contextual in-app help, AI Assist resources, documentation and training, support, and FAQs. You can also find links to join the community in Cloud Customer Connect, submit enhancement requests and feedback to the Idea Lab, and provide feedback about the platform through Submit Feedback.



Learn About and Use AI Assist

AI Assist brings the collective knowledge and intelligence of Oracle directly to your team through the power of generative AI. AI Assist is designed to help you make faster, smarter decisions with confidence. For details and suggestions, use the interactive guides in the help menu or review the Using AI Assist section.

Learn How to Use Success Navigator with Interactive In-App Help
The **Help on this Page** section of the help menu shows all available interactive guides for the page you're on. These guides include interactive step-by-step and orientation guides to help you become familiar with the application. You'll also find tips ⓘ throughout the application.

Read the Documentation
The **Help & Training** section of the help menu includes:

- A detailed **User Guide** to help you understand how to use the application.
- **Release Notes** to acquaint you with new features and functionality.
- Enablement and reference content such as **Success Navigator Essentials Training & Assessment** and **Starter Configuration Reference**.
- FAQs by category to quickly answer your question.

Get Support and Provide Feedback
Use the links in he Support & Feedback section to:

- Submit Success Navigator support requests.
- Submit feedback about your experience with Success navigator.
- Access Cloud Customer Connect from the help menu to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest ideas for product enhancements, and watch events.
- Share your thoughts on how we can improve Success Navigator. Select **Submit an Idea** to make enhancement requests in the Idea Lab for Success Navigator. In the Idea Lab, you can search for and review ideas already submitted by other users. You can interact with ideas to show your support by voting on the idea, adding comments, bookmarking the idea, and more.

Web Browser Requirements

Oracle aims to leverage modern web standards to deliver an exceptional customer experience. You can use any modern, supported browser, including Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari.

Compatible browsers for Success Navigator users are listed below:

- Google Chrome 80+
- Apple Safari 13+
- Microsoft Edge 80+
- Mozilla Firefox 68+

Accessibility

Success Navigator is designed with accessibility features to support assistive technologies, such as screen readers, as well as keyboard navigation. For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program. Success Navigator is built with Redwood components and benefits from their strong, built-in accessibility features. Learn about Redwood's "Frequently used keyboard controls" in What are the common keyboard behaviors for Redwood applications?.

Navigation & Keyboard Shortcuts

Users can navigate within Success Navigator, including embedded Oracle Guided Learning (OGL) guides, and access all relevant functionality using only the keyboard. Assistive technology is not required to use keyboard-only navigation. When an OGL guide is running and a tip appears, the focus will be placed on the tip and then the Tab key may be used to navigate within the tip.

Keyboard shortcuts enable user interface actions without a mouse. Following is a list of shortcuts available for Success Navigator with embedded OGL and their function:

Windows Keyboard Shortcut	Mac Keyboard Shortcut	Description
Alt+Ctrl+H	Control+Option+H	Opens and closes the Help Panel. The Help Panel will open with the focus on the Search bar. When opened, use the Tab key to move the focus through the Help Panel items from left to right, top to bottom, and press Enter to select the desired choice. For launch guide use arrow keys, then Enter.
Alt+Ctrl+B	Control+Option+B	Toggles the pulsing of active beacons on the page on or off.
Alt+Ctrl+S	Control+Option+S	Switches on/off hover mode. When this mode is switched on, the first hover tip in the page will appear. The "[" (left bracket) or "]" (right bracket) will navigate the user around all the hover tips available on the page. (Smart tip and Beacon tip are considered hover tips). Use the same Alt+Ctrl+S shortcut to exit this mode. NB: Navigation keys vary from one screen reader (like JAWS) to another.
Alt+Ctrl+C	Control+Option+C	Toggles the focus from the element to smart tip it is associated with. The same shortcut can be used to navigate back to element.
Esc Key	Esc Key	If the focus is on the Help Panel, the Esc button closes the Help Panel and returns focus to the host application. If the focus is on a tip, the Esc button will close the tip AND close the guide.
Fn+F2	Fn+F2	Enables keyboard action on elements inside the item, including navigate between focusable elements inside the item.

2 Get Started

After you get access to Success Navigator, you can start using the application to manage your Oracle implementations and operations. Read the topics in this section to start working with Success Navigator.

- About Oracle AI Success Navigator
- First-time Administrator Setup
- Sign In to Oracle AI Success Navigator
- Get Started on the Home Page

About Oracle AI Success Navigator

Oracle AI Success Navigator is an interactive digital platform that provides your organization with a clear roadmap to help you optimize your cloud transformation. With preconfigured starter environments, implementation guidance, key milestone tracking, AI assistance, customized quarterly release insights, and Oracle Modern Best Practice, Success Navigator equips you with the tools you need to thrive in the cloud. Find more information on the Oracle AI Success Navigator website.

Objectives

- Provide guidance to manage your Oracle Cloud product from purchase through cloud releases.
- Provide implementation-specific guidance and resources to support successful product installation.
- Coordinate milestones, goals, and activities with Oracle, partners, and customers throughout the cloud implementation journey.
- Deploy a functional Starter Configuration to enable solution familiarization and accelerate design discussions.
- Provide advice for constant innovation and successful product adoption.
- Deliver data insights to help identify opportunities to accelerate adoption, increase productivity, and lower the cost of installation and upgrades.

Features

Here are some of the features you can use whether you're just starting with Oracle Cloud applications or need to maintain and innovate the applications you're using in production.

- **Cloud guidance journeys**: Success Navigator provides leading practices and actionable guidance at all stages of the cloud journey. With leading success indicators to guide you at each stage, Success Navigator helps you map out a clear route to success.
- **Starter Configuration:** The Starter Configuration provides a seamless experience with predefined settings and configurations, eliminating the hassle of extensive setup. You can quickly access a functional, ready-to-use environment. The starter environment also includes pre-defined settings for your Fusion instance and allows basic personalization.

- **Quarterly update adoption**: Success Navigator highlights innovation opportunities with each Oracle quarterly release based on business processes, data insights, and industry benchmarks to help you best leverage the updates and maximize value. Support continuous innovation with Adoption Centers, update planning, consolidated feature information, and best practices for the Evolve stage.
- **Programs and projects**: Manage implementations at multiple levels using programs and project, whether your implementation is simple or a complex wave implementation with multiple applications and geographies.

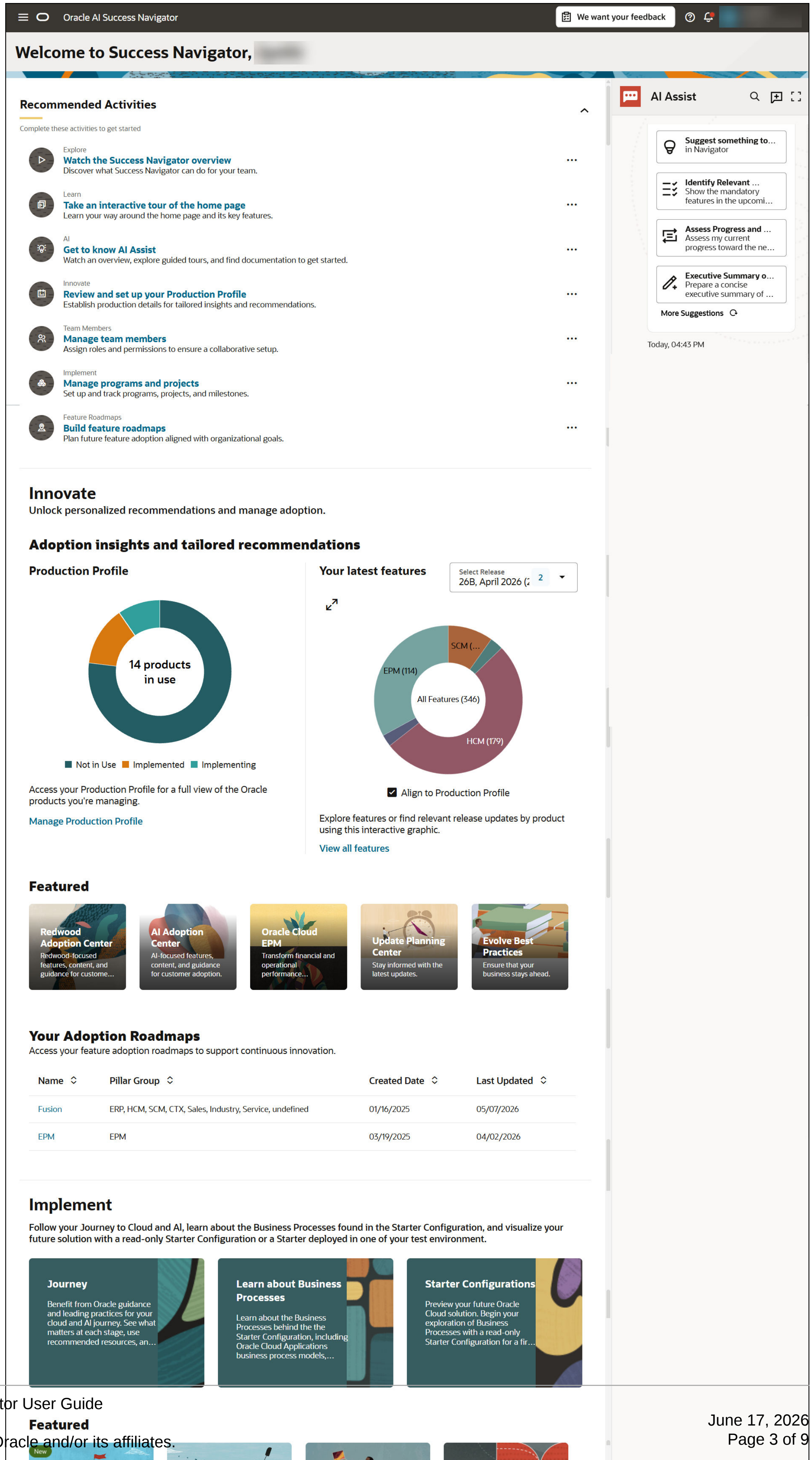
First-time Administrator Setup

After Oracle provisions an account, the person identified as the administrator receives an email welcoming them to Success Navigator. After you sign in, review the Recommended Actions, which include tasks to get you started with Success Navigator.

To set up Success Navigator

1. Select **Log In** in the welcome email and sign in with your Oracle Account.
   You can always go to https://navigator.oracle.com/.
2. Respond to the Terms and Conditions.
   You won't have access until you accept the Terms and Conditions.
3. Review the Recommended Actions at the top of the home page.
4. Admins can select the toggle next to **AI Assist** under **My Organization** to enable or disable the AI Assist feature for your organization.
5. Add your Team Members at the top of the sidebar on the home page. For more information about managing your team, see My Team.
   You need to have Team Members available to assign to programs and projects.
6. Add programs and projects. For more information about programs and projects, see Programs and Projects.Programs represent your high-level implementation, while projects represent discrete implementation for phased or wave deployments.

> **Note**
>
> The first admin might not be ready to define all of the milestone dates for the programs or projects. In that case, you can set up the overall program with estimated milestone dates, and then add projects and confirmed milestone dates later.


Oracle AI Success Navigator
We want your feedback
Welcome to Success Navigator,
Recommended Activities
Complete these activities to get started
Explore
Watch the Success Navigator overview
Discover what Success Navigator can do for your team.
Learn
Take an interactive tour of the home page
Learn your way around the home page and its key features.
AI
Get to know AI Assist
Watch an overview, explore guided tours, and find documentation to get started.
Innovate
Review and set up your Production Profile
Establish production details for tailored insights and recommendations.
Team Members
Manage team members
Assign roles and permissions to ensure a collaborative setup.
Implement
Manage programs and projects
Set up and track programs, projects, and milestones.
Feature Roadmaps
Build feature roadmaps
Plan future feature adoption aligned with organizational goals.
AI Assist
Suggest something to... in Navigator
Identify Relevant ... Show the mandatory features in the upcomi...
Assess Progress and ... Assess my current progress toward the ne...
Executive Summary o... Prepare a concise executive summary of ...
More Suggestions
Today, 04:43 PM
Innovate
Unlock personalized recommendations and manage adoption.
Adoption insights and tailored recommendations
Production Profile
14 products in use
Not in Use
Implemented
Implementing
Access your Production Profile for a full view of the Oracle products you're managing.
Manage Production Profile
Your latest features
Select Release
26B, April 2026
SCM (...
EPM (114)
All Features (346)
HCM (179)
Align to Production Profile
Explore features or find relevant release updates by product using this interactive graphic.
View all features
Featured
Redwood Adoption Center
Redwood-focused features, content, and guidance for custome...
AI Adoption Center
AI-focused features, content, and guidance for customer adoption.
Oracle Cloud EPM
Transform financial and operational performance...
Update Planning Center
Stay informed with the latest updates.
Evolve Best Practices
Ensure that your business stays ahead.
Your Adoption Roadmaps
Access your feature adoption roadmaps to support continuous innovation.
Name
Pillar Group
Created Date
Last Updated
Fusion
ERP, HCM, SCM, CTX, Sales, Industry, Service, undefined
01/16/2025
05/07/2026
EPM
EPM
03/19/2025
04/02/2026
Implement
Follow your Journey to Cloud and AI, learn about the Business Processes found in the Starter Configuration, and visualize your future solution with a read-only Starter Configuration or a Starter deployed in one of your test environment.
Journey
Benefit from Oracle guidance and leading practices for your cloud and AI journey. See what matters at each stage, use recommended resources, an...
Learn about Business Processes
Learn about the Business Processes behind the the Starter Configuration, including Oracle Cloud Applications business process models,...
Starter Configurations
Preview your future Oracle Cloud solution. Begin your exploration of Business Processes with a read-only Starter Configuration for a fir...
Featured
New

7. Set up the Production Profile, which is a snapshot of the pillars and products that you're implementing or that are already in production. For more information about the Production Profile, see Production Profile.

Sign In to Oracle AI Success Navigator

After you're added as a Success Navigator Team Member, you’ll get a welcome email. The email includes a link to sign in, but you can always sign in at https://navigator.oracle.com/.

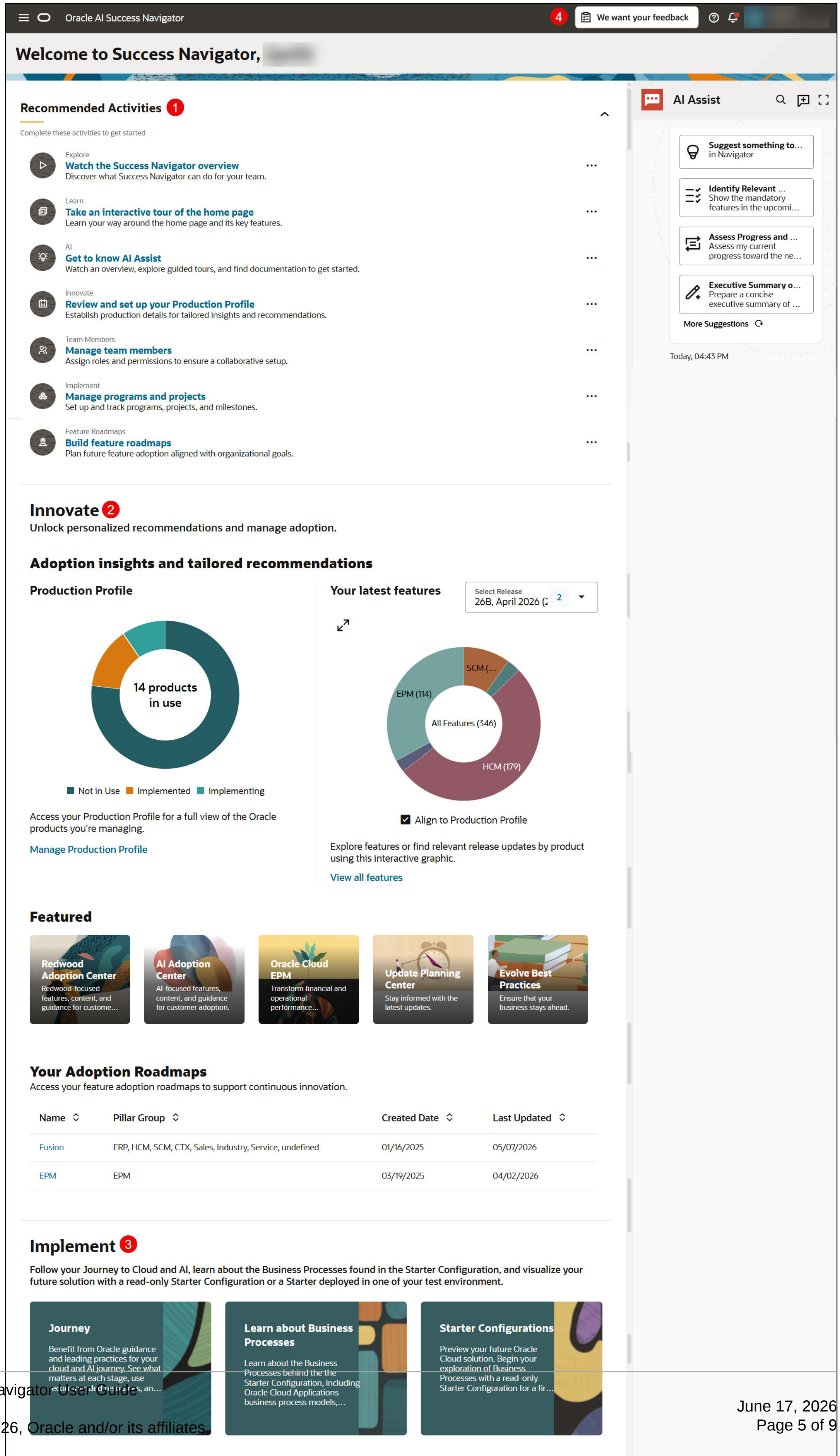
1. Open the welcome email, and then select **Log In.**
2. Sign in using your Oracle Account.
   If you don't have an Oracle Account, you can create one during the sign-in process.

Get Started on the Home Page

The home page is your starting point for Success Navigator.

It's organized into four sections:

1. Recommended Activities
2. Innovate
3. Implement
4. Application Header


Oracle AI Success Navigator
4
We want your feedback
Welcome to Success Navigator,
Recommended Activities 1
Complete these activities to get started
Explore
Watch the Success Navigator overview
Discover what Success Navigator can do for your team.
Learn
Take an interactive tour of the home page
Learn your way around the home page and its key features.
AI
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AI Assist
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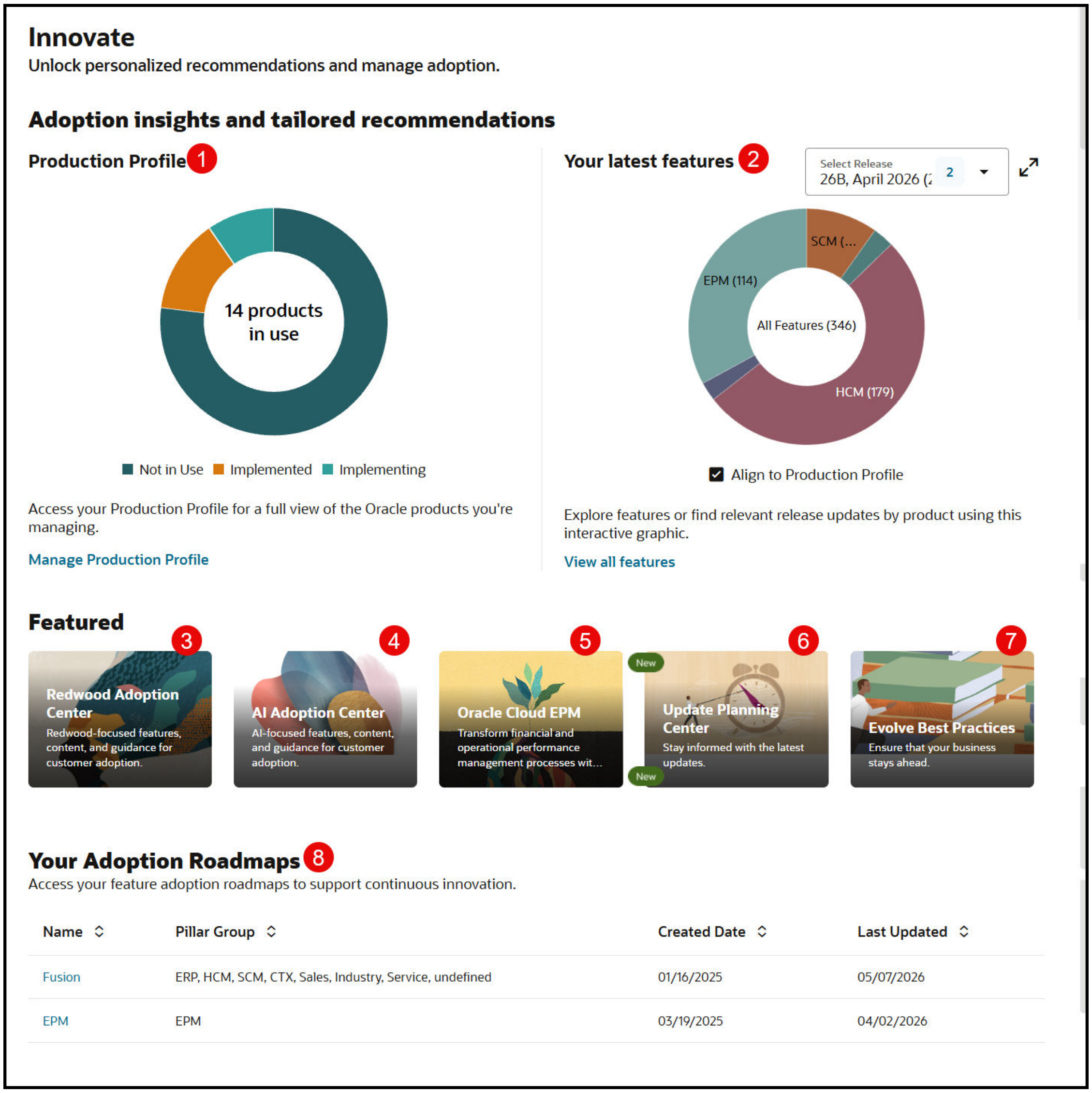
Assess Progress and … Assess my current progress toward the ne…
Executive Summary o… Prepare a concise executive summary of …
More Suggestions
Today, 04:43 PM
Innovate 2
Unlock personalized recommendations and manage adoption.
Adoption insights and tailored recommendations
Production Profile
14 products in use
Not in Use
Implemented
Implementing
Access your Production Profile for a full view of the Oracle products you're managing.
Manage Production Profile
Your latest features
Select Release
26B, April 2026
2
SCM (…
EPM (114)
All Features (346)
HCM (179)
Align to Production Profile
Explore features or find relevant release updates by product using this interactive graphic.
View all features
Featured
Redwood Adoption Center
Redwood-focused features, content, and guidance for custome…
AI Adoption Center
AI-focused features, content, and guidance for customer adoption.
Oracle Cloud EPM
Transform financial and operational performance…
Update Planning Center
Stay informed with the latest updates.
Evolve Best Practices
Ensure that your business stays ahead.
Your Adoption Roadmaps
Access your feature adoption roadmaps to support continuous innovation.
Name
Pillar Group
Created Date
Last Updated
Fusion
ERP, HCM, SCM, CTX, Sales, Industry, Service, undefined
01/16/2025
05/07/2026
EPM
EPM
03/19/2025
04/02/2026
Implement 3
Follow your Journey to Cloud and AI, learn about the Business Processes found in the Starter Configuration, and visualize your future solution with a read-only Starter Configuration or a Starter deployed in one of your test environment.
Journey
Benefit from Oracle guidance and leading practices for your cloud and AI journey. See what matters at each stage, use
Learn about Business Processes
Learn about the Business Processes behind the the Starter Configuration, including Oracle Cloud Applications business process models,…
Starter Configurations
Preview your future Oracle Cloud solution. Begin your exploration of Business Processes with a read-only Starter Configuration for a fir…

Innovate

The Innovate section includes tools and information to help you operate, maintain, and continuously innovate your Oracle Cloud Applications.

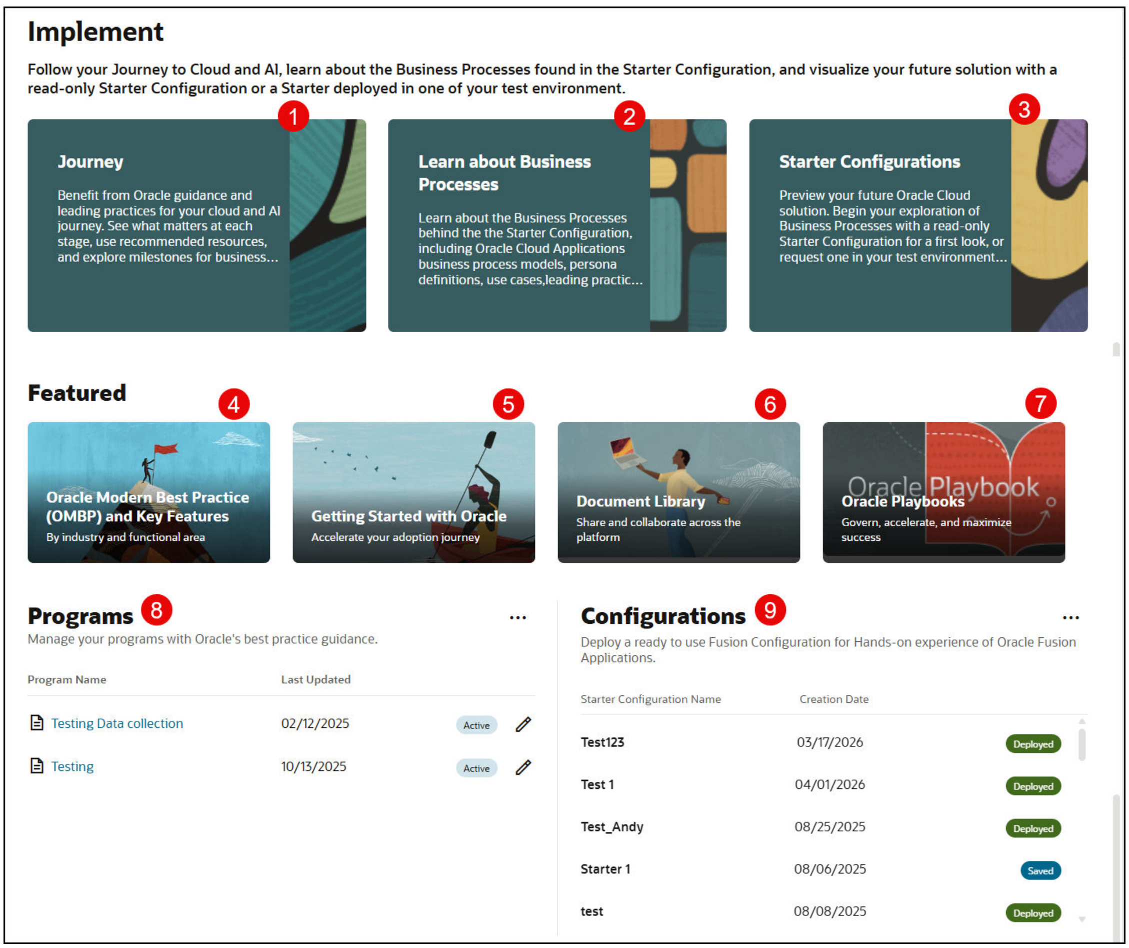


1. Production Profile—Your Production Profile defines the details of the Cloud Applications that you're tracking in Success Navigator. It aligns to the pillars and products displayed by default in the Your Latest Features sunburst visualization.
2. Your Latest Features—Use the interactive sunburst visualization to explore and filter features for the selected release. Choose a release from the dropdown menu to instantly see the distribution of latest features across products—including CTX, ERP, EPM, and more. The chart visually represents the number of features in each category, helping you quickly find relevant updates in your Production Profile. The “Align to Production Profile” option ensures that the features displayed match your organization’s usage. The sunburst aligns to the Production Profile by default, but can be toggled off to view all pillar features.

3. Redwood Adoption Center—Here, you can find a curated collection of training, learning, best practices, features, and recommendations for adopting Oracle's innovative Redwood design system.
4. AI Adoption Center—Find a curated collection of training, learning, best practices, features, and recommendations to adopt AI features.
5. Oracle Cloud EPM — Access guidance, resources, and recommendations to help improve financial and operational performance management with Oracle Cloud EPM.
6. Update Planning Center— Stay informed about the latest updates and manage feature adoption activities through release planning, readiness tracking, and roadmap management.
7. Evolve Best Practices—Best Practices offers guidance, tips, and resources to help organizations operate effectively and efficiently in the Cloud while continuously innovating.
8. Roadmaps—As you explore new features in Success Navigator, you can quickly add them to roadmaps. Organize the features to show which you're adopting now, next, and later.

Implement

The Implement section includes tools and information to help you deploy your Oracle Cloud Applications, manage your programs and projects in Success Navigator, and manage Starter Configurations.



1. Journey—Journeys offer a centralized source of information, learning resources, activities, and resources to guide you during the implementation project.

2. Learn about Business Processes—Get detailed business processes optimized to take advantage of the latest in Oracle's applications and technologies. Access business process models, videos, step-by-step guides, persona definitions, use cases, Oracle leading practices, and KPIs.
3. Starter Configurations—Explore business processes using a read-only Starter Configuration or request a Starter Configuration for your test environment. Use Starter Configurations to preview Oracle Cloud solutions and support implementation planning and design discussions.
4. Oracle Modern Best Practice (OMBP) and Key Features— Explore Oracle Modern Best Practice business processes and associated Key Features by industry and functional area to understand how Oracle capabilities support business outcomes.
5. Getting Started with Oracle— Access onboarding guidance, activation and provisioning resources, process flows, and setup information to help accelerate your Oracle Cloud adoption journey.
6. Document Library—Share documents with team members and assign them to specific projects and stages in a Journey.
7. Oracle Playbooks—Discover resources, training, and videos about strategies Oracle has used to grow revenue over the last 20 years.
8. Programs—View and manage the programs and projects that allow you to organize your implementations and define milestones for them.
9. Configurations—Starter Configurations to support and accelerate your implementations, helping drive design discussions with configurations aligned to Business Processes.

Recommended Activities

The Recommended Activities section contains actions you should take depending on your Access Level. For example, all users with an Admin Access Level see the same list of actions. any user completes actions, other users with the same Access Level see the action as completed.

1. My Team—View Team Members by their Relationship Type (Member, Oracle, or Partner). Admins can manage Team Members from the menu.
2. Upcoming Events—View access, and register for upcoming Oracle events available to members of the Oracle community.

Application Header

Application header includes the following options:

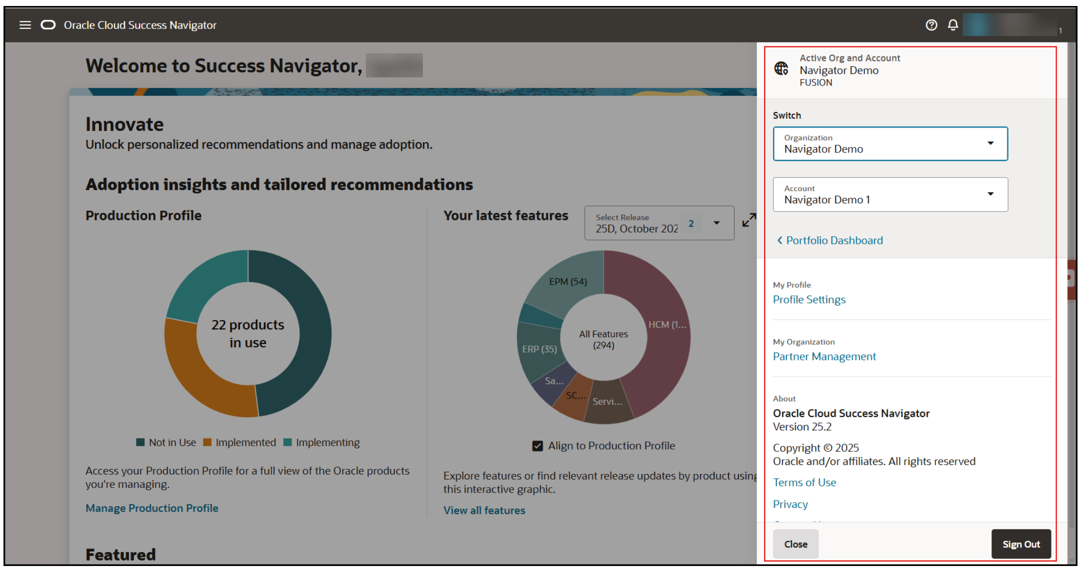
- **Application Menu**
  The application menu enables quick navigation in Success Navigator. It's organized by your intentions for using the application: the **Implement** section includes access to the tools and guidance needed while implementing Oracle applications, while the **Innovate** section collects the functionality you'll use while living in the cloud.
- **Access the Account Portfolio**
  The Account Portfolio only appears for users with in multiple organizations. You can return to Account Portfolio and switch between selected accounts anywhere in the application.
- **Help Menu**
  Use the help menu to access to contextual in-app help, documentation, support, and FAQs. You can also find links to join the Cloud Success Navigator community, submit requests and feedback to the Idea Lab, and provide feedback about the platform through a survey. See Get Help for more information.
- **Notification Bell**

See recent activity in programs and projects.

- **User Menu**
  Use to access application settings, about and sign out.
  - To return to the Account Portfolio, select **Portfolio Dashboard**.
  - To switch accounts, select the Organization and Account in the Switch section.

> **Note**
>
> These options are available only if you are a member of more than one organization.

  - Select **Profile Settings** from **My Profile** to update your personal information.
  - Select **Partner Management** from **My Organization** to manage your partners.



3

AI Assist in Success Navigator

AI Assist is an embedded, AI-powered guide inside Success Navigator that helps users make faster, more informed decisions, plan next steps, and accelerate adoption with personalized, actionable recommendations. It supports natural language questions, provides contextual and role-based insights, prioritizes high-impact actions, and sequences activities with timelines and dependencies.

AI Assist connects to roadmaps, Production Profile, your user profile, milestones, business processes, release features, journeys, programs and projects, and Oracle public documentation, blogs, and community content so you can ask questions and generate plans directly where you work. It adapts to your role and context throughout the customer lifecycle (discover, design, validate, go-live, operate).

> **Note**
>
> To enable or disable AI Assist, use the toggle next to **AI Assist** under **My Organization** in the **User Menu**.

Using AI Assist

This topic covers how you use AI Assist to chat, manage your chat history, and more. Review our Tips and Tricks page for ways to get the most out of AI Assist.

What you can do with AI Assist

- Roadmap planning and prioritization: Analyze items by focus area, impact, and effort; identify mandatory features; create sequenced adoption plans with dependencies and timelines. Use plain language to manage roadmap data like assignees, tags, column organization (including custom column names), and comments.
- Release feature dispositioning and implementation: See features included in a release, distinguish mandatory vs. optional for your profile, and generate implementation steps or a mermaid Gantt plan.
- Milestones and program health: List kickoff dates and milestones, check whether you're on track, and visualize plans in Gantt format.
- OMBP and Key Features and Business Processes: Surface the most relevant features and business processes for your organization and map to KPIs and reports, including multilingual outputs if needed.
- Role-based and executive-ready summaries: Produce concise summaries and next best actions for program managers and executives with timelines and dependencies.
- Access to official Oracle content: Retrieve information from approved Oracle web sources, including Oracle documentation, blogs, and community content. Accessible domains include *.oracle.com, community.oracle.com, docs.oracle.com, and blogs.oracle.com.
- Get the most current and relevant guidance: Ask for help about using Success Navigator and retrieve the latest from the Success Navigator FAQs and User Guide.
- Rate responses: Provide response ratings to improve future outputs.

Chat with AI Assist

To chat with AI Assist:

Quickly try AI Assist with no setup and see immediate, relevant results to the page you're on.

1. Select **AI Assist** on any supported page.
2. Review the pre-built prompts that relate to the page, or enter your own question.

   If a prompt asks for selections, make your choices, then select **Generate** to view results.
3. Refine the response with follow-up questions or request a specific format such as a table, checklist, or Gantt.

Start a new chat

Kick off a focused conversation with clear context so you get faster, more accurate answers.

1. Open **AI Assist**.
2. Select **New Chat**.
3. Enter a message or select a prompt.
4. Send your message.

Continue a conversation and find history

Build on prior work and reuse context so you don't start from scratch every time.

- Select **Maximize** to expand the AI Assist window.
- Use **Search** to find a conversation, or select one from the History panel.
- To focus on the content area, select **Hide Panel**.

Use pre-built prompts

Leverage curated, page-aware prompts to get high-quality outputs faster, with less typing.

- Pre-built prompts are associated with the page you are viewing.
- Some prompts collect your selections or ask short questions to tailor the result.
- After you respond, select **Generate** to produce the output.
- Examples by page:
  – Feature Innovation: Explore and learn about new releases; View mandatory features in the upcoming release; Suggest features tailored to your organization's data and Production Profile; Review your release schedule
  – Roadmap: Suggest features to add to your roadmap; View features that are ready to use
  – OMBP: Learn about OMBP; Explore best practices for configuring a business process; Measure business outcomes of a business process

Manage a conversation

Keep your workspace tidy and organized by renaming or deleting chats. Manage your chats in the maximized window.

- Conversations save automatically with a title derived from the context of the conversation.
- To rename or delete a conversation, open the (…) menu for the thread, then select **Rename** or **Delete**.

Rate responses (and)

Improve answer quality over time by telling AI Assist what worked and what did not. Your ratings and optional comments help fine-tune future responses, making them more accurate, relevant, and aligned to your needs.

Copy content

Lift any prompt or response into emails, docs, or tickets instantly without typing again.

- Use **Copy** on any prompt or response to copy text to your clipboard.

Resize or close the window

Maximize for full controls (history, search) when you need them; minimize to stay focused on your task.

- Select **Maximize** to expand AI Assist. The History panel, Search, New Chat, and Hide Panel are available only when maximized.
- Select **Minimize** to return to the default size.
- Close the window when finished. Your conversations remain saved.

Security and privacy

- Do not include confidential, personal, or proprietary information in prompts.
- Use generic labels instead of names or sensitive identifiers.

Upload and Analyze Files with AI Assist

Use file uploads in AI Assist to search, summarize, and ask questions about documents that you upload in Oracle AI Success Navigator.

After you upload a document, you can use AI Assist to:

- **Search and ask questions about document content.** AI Assist can answer questions, summarize sections, and extract relevant information from uploaded documents. This is useful when you want AI Assist to work with organization-specific content, such as custom policies.
- **Get personalized assistance.** AI Assist can use uploaded documents to provide responses based on your organization's processes, configurations, and documentation instead of relying only on generic Oracle content.
- **Find information in documents.** Ask AI Assist to locate specific sections, tables, or details in an uploaded document instead of manually searching through lengthy files.
- **Keep document access private.** Uploaded documents are available only within the AI Assist conversation where they were uploaded.

Uploaded documents are stored securely in OpenSearch in the US East (Ashburn) region.

> **Note**
>
> Do not upload documents that contain sensitive or confidential information, including personally identifiable information (PII).

Upload a File to AI Assist

AI Assist supports the file types listed in the **Supported file types** section.

For best results, upload files that are 20 MB or smaller.

You can upload one file at a time. You can upload multiple files during a conversation.

Uploaded documents cannot be edited after upload. To update a document, upload a revised version.

Analyze a File in AI Assist

After you upload a document, ask AI Assist questions about its content.

Examples:

- Summarize this document.
- What are the key recommendations in this document?
- Find information about data retention.
- What are the main requirements described in this document?
- Show me the section that discusses implementation timelines.
- What changes were introduced in this version of the document?

AI Assist can search uploaded documents, summarize content, and identify relevant information based on your questions.

Manage Files in AI Assist

To delete an uploaded document, delete the conversation that contains the document.

Supported File Types

AI Assist supports the following file types:

- DOCX
- DOC
- MSG
- PDF
- CSV
- TSV
- XLS
- XLSX
- TXT
- HTML
- XML

> **Note**
>
> AI Assist supports only the file types listed above. PPT, PPTX, MP3, MP4, and image files are not supported.

AI Assist File Upload Limitations

Files uploaded to AI Assist do not:

- Save the file to Oracle's global documentation.
- Make the file publicly available.
- Automatically share the file or its content with other people in your organization.
- Edit the file or manage document versions.
- Upload the file to My Documents in Success Navigator.

AI Assist Tips and Tricks

Leveraging AI Assist effectively can significantly enhance your productivity and decision-making processes. Below are key strategies to optimize your experience:

Be Clear and Specific

Clearly articulate your questions or requests, providing relevant details and context. Specificity leads to more accurate and tailored responses.

- **Success Navigator AI Assist tip**: Depending on your request, consider relevant details such as the product, pillar, timeframe, your goal, and more.
- **Example**: "Analyze our HCM roadmap items by focus area and level of effort, then summarize the top five priorities for next quarter, with rationale."

Break Down Complex Requests

Divide multi-part objectives into smaller, sequential prompts to improve accuracy and clarity.

- **Success Navigator AI Assist tip**: Ask for identification first, then analysis, then recommendations.
- **Example**: "1) Identify features on our roadmap that are enabled out of the box; 2) Identify those requiring setup; 3) Recommend the next five to implement with dependencies and effort."

Specify Format Preferences

Tell AI Assist how you want results presented to speed consumption and execution.

- **Success Navigator AI Assist tip**: Request a table, summary, step list, or a Gantt when you need a plan view.
- **Example**: "Provide the status of each feature in our Fusion roadmap as a table, then create a Gantt for the next 60 days of implementation tasks."

Use Role and Audience Context

Mention your role or target audience so outputs reflect role-based insights and your audience.

- **Success Navigator AI Assist tip**: State “As a program manager…” or “For an executive readout…” to tailor content.
- **Example**: "As a program manager, create an executive-ready summary of high-impact actions with timelines, dependencies, and risks for next quarter."

Clarify Ambiguities

If the first response is too broad, narrow the scope by pillar, status, or timeframe.

- **Success Navigator AI Assist tip**: Add filters like “HCM only,” “in progress,” or “due in 60 days.”
- **Example**: "Focus only on HCM AI features that are in progress and due within 60 days; exclude optional items."

Ask Follow-Up Questions

Continue the dialogue to refine results, uncover blockers, and validate assumptions.

- **Success Navigator AI Assist tip**: Use iterative prompts to probe dependencies, risks, and alternatives.
- **Example**: "Based on the upcoming milestone assessment, are we on track? If not, list the top three blockers and proposed mitigations."

Request Step-by-Step Guidance

When you need to execute, ask for ordered tasks, owners, prerequisites, and test considerations.

- **Success Navigator AI Assist tip**: Request checklists and clear acceptance criteria.
- **Example**: "Provide the implementation steps for Feature X, including prerequisites, configuration, test plan, and success criteria; then produce a Gantt."

Start a New Conversation

Use a fresh conversation when your topic changes substantially, the audience/goal shifts, or you want to avoid inherited constraints from prior context.

- **Navigator AI Assist tip:** Start new threads for different products/pillars, new projects or phases, or when prior context could bias results (e.g., switching from HCM release planning to SCM OMBPs).
- **Example:** New conversation: “As a supply chain lead, identify the top SCM OMBPs relevant to our Production Profile and propose a 60-day adoption plan with dependencies.”

Maintain the Same Conversation

Keep the thread when iterating on the same topic so AI Assist can build on prior context and refinements

- **Navigator AI Assist tip:** Use follow-up prompts to narrow scope, add constraints, and confirm assumptions; reference earlier outputs to avoid rework.
- **Example:** “Great—using the roadmap table you just created, re-rank the features by impact vs. effort, limit to mandatory items, and generate a mermaid Gantt for the next 60 days.”

Personalize with Your Organization’s Context

Reference your Production Profile, pillar, usage patterns, or KPI targets for tailored guidance.

- **Success Navigator AI Assist tip**: Ask AI Assist to use your Production Profile and production data when available.
- **Example**: "Show the OMBPs most relevant to our Production Profile and map them to KPIs and reports; personalize using our production data."

Prioritize for Value and Time-to-Value

Ask for impact/effort analysis and “do-now” items to accelerate outcomes.

- **Success Navigator AI Assist tip**: Request timelines and dependencies to sequence activities.
- **Example**: "Analyze our roadmap by impact and level of effort, then recommend the top five mandatory features to implement now, with timelines and dependencies."

Track Milestones and Program Health

Use milestone visibility to manage timelines, reduce escalations, and realize value earlier.

- **Success Navigator AI Assist tip**: Ask for milestone status, at-risk items, and remediation steps.
- **Example**: "List our program kickoff dates and milestones and generate a mermaid Gantt; identify any at-risk milestones and remediation."

Protect Sensitive Information

Do not paste confidential, personal, or proprietary data. Follow Oracle’s security and compliance standards.

- **Success Navigator AI Assist tip**: Use generic labels (e.g., Program A) and avoid PII; follow internal data-handling policies.
- **Example**: "When discussing program details, reference Program A and role types (e.g., payroll lead) rather than names or PII."

Validate Outputs and Provide Feedback

Sanity-check key facts (e.g., feature mandatory status) and use ratings or clarifications to improve future responses.

- **Success Navigator AI Assist tip**: Confirm assumptions against official release notes and ask AI Assist to revise.
- **Example**: Confirm Feature X’s mandatory status, then ask: “Revise the plan assuming Feature X is optional for our SKU; re-sequence accordingly,” and rate the response.

Ask for Visuals When They Help

When you want a specific visual, explicitly request a specific visual type.

- **Success Navigator AI Assist tip**: Say “create a Gantt” for timelines and dependencies.
- **Example**: "Create an implementation plan for our upcoming release features and present it as a Gantt chart with milestones and owners."

Use Multilingual and Accessibility Options

Request bilingual outputs or simplified summaries for broader stakeholder engagement. You can ask AI Assist which languages it can translate as Oracle adds more languages over time.

- **Success Navigator AI Assist tip**: Ask for English and Spanish when sharing OMBPs across teams.
- **Example**: "Provide the list of HCM OMBPs in English and Spanish, with one-line summaries for each."

OpenAI endpoint for AI Assist

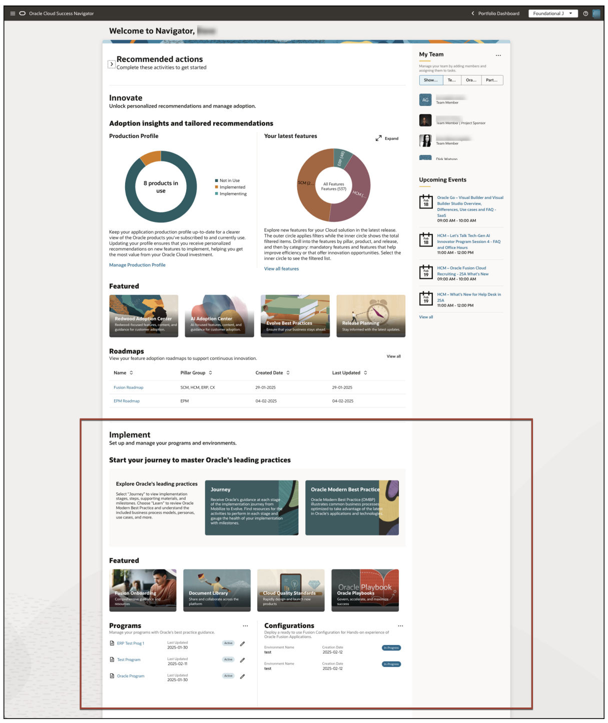
AI Assist uses an OpenAI-compatible Generative AI endpoint for customer-facing AI Agents and AI assets. Use the endpoint in the following table when configuring customer-facing AI Assist requests.

The table includes only the endpoint currently used for customer-facing AI Assist. Other internal or regional endpoints might exist, but they are not intended for direct customer access through this guide. Customers access supported endpoints through API calls from Oracle applications; they do not have direct access to German API endpoints.

Realm	Data Center Location	Region ID	OpenAI Endpoint Location	Endpoints
OC1	US Midwest (Chicago)	us-chicago-1	USA	• https://inference.generativeai.us-chicago-1.oci.oraclecloud.com/20231130/actions/chat • https://inference.generativeai.us-chicago-1.oci.oraclecloud.com/openai/v1

4
Implement

Success Navigator helps you implement Oracle applications with the tools and guidance you can find in the Implement section of the home page.



- Journeys
- Cloud Implementation Milestones
- Oracle Playbooks
- Work with Milestones and Assessments
- Oracle Modern Best Practice (OMBP) and Key Features
- Getting Started with Oracle

Journeys

Journeys offer a centralized source for stage milestones, information, learning resources, activities, and resources to guide you during the implementation project. Each journey is divided into stages that include a collection of topics and content that align with milestones and key phases of an implementation project.

Success Navigator supports additional customized journeys. All customers can access the Foundational Journey, while customers with selected implementation partners can access an additional journey. Work with your implementation partner to identify if a customized journey is available. If you're interested in setting up a customized journey, reach out to your Oracle contact to initiate a conversation.

Access Your Journeys

You can access journeys from the home page or the menu.

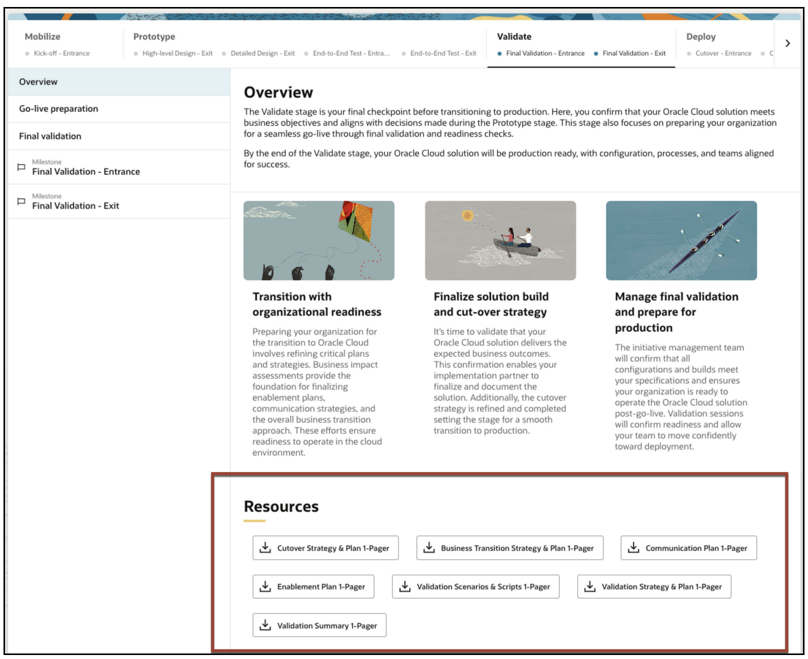
- To access journeys from the home page, select **Journey** in the Implement section.
- To access journeys from the menu, select **Cloud Journey**.

Each stage in a journey is composed of three elements:

- An overview with summary information about the stage and the entire collection of downloadable resources for the stage.
- Topics that provide information about the activities typically needed within a stage.
- Milestones include assessments that help you gauge your progress on that milestone. Admins and Team Members can update these assessments. For details about working with assessments along with programs and projects, see Programs and Projects.

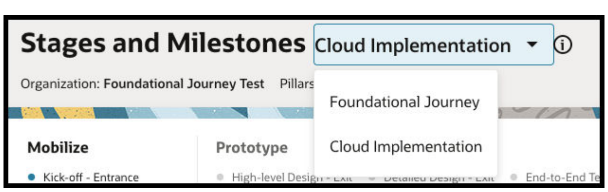
Download Resources in a Journey

Most topics in the journey include downloadable assets. The Overview topic in each stage shows all of the assets collected from the various topics. You can also access these resources in the Document Library.



Switch Between Journeys

If your implementation partner has created a customized journey, you have access to two journeys: Foundational Journey and the customized journey. When you have access to more than one journey, the journey title includes a menu of those available to you.



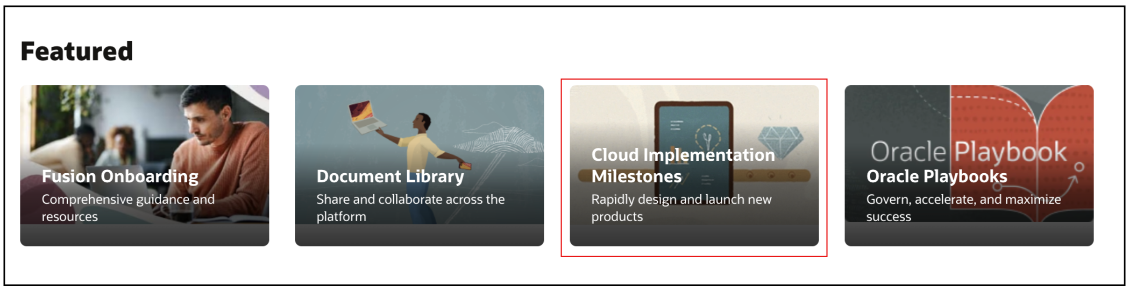
Cloud Implementation Milestones

Oracle Cloud Implementation Milestones support your implementation by sharing the collective knowledge and lessons learned from thousands of implementations globally. In Success Navigator, you can view the milestones for each implementation phase, along with guidance and videos that provide more information.

Along with the Journey, it provides a blueprint for implementation that compliments a variety of implementation methodologies and toolsets, regardless of your implementation partner.

Accessing Cloud Implementation Milestones

To access Cloud Implementation Milestones from the home page, scroll to the Featured area in the Implement section, and then select **Cloud Implementation Milestones**.



On the Cloud Implementation Milestones page, select **Explore More** to view:

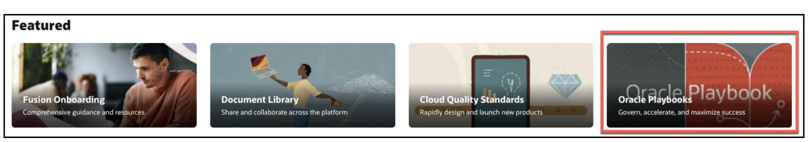
- The objectives for each milestone.
- Entry and exit criteria.
- Videos with additional guidance and information.

Oracle Playbooks

Oracle Playbooks describe Oracle's strategy and learnings from the past 20 years that have enabled us to grow revenue while increasing our operating margin and delivering an exceptional customer experience. Success Navigator includes a curated list of Oracle Playbooks tailored to support the Cloud implementation journey. In the Playbooks, you can watch videos, access ebooks, and find related MyLearn training modules.

Accessing Oracle Playbooks

To access Oracle Playbooks from the home page, scroll to the Featured area in the Implement section, and then select **Oracle Playbooks**.



Work with Milestones and Assessments

Milestones appear in the journey, program, and project to identify waypoints that help you understand where you are in a given stage. The assessments within each milestone provide questions that highlight the success criteria needed to accomplish the milestone. The project team can review the results, identify any impacts, review comments from others in the project team relating to the assessment, and address gaps. Admins and Team Members with access to the program or project can update assessments.

Because journeys are not tied to a particular program or project, the assessments in the journey provide a static view of the questions. For a dynamic view of an assessment, including individual question status, overall assessment status, and notes, access the milestone from its related program or project.

View Milestones and Assessments

View milestones and their associated assessments in the Journey or in its related program or project. Milestones in the Journey provide a static view of the assessments, while milestones in their related program or project provide a dynamic view with statuses and notes.

Each assessment includes:

- A video that describes the milestones.
- A list of assessment questions.
- Details that provide context for the questions.
- A T-date that shows when the questions should be completed prior to.

When accessing milestones from the program or project, you can also see:

- The status of each question (Not Started, In Progress, or Criteria Met).
- The overall status of the assessment.
- Any notes left by the person updating an assessment.

View Milestones and Assessments in the Journey

To view milestones and assessments in the Journey:

1. Access the Journey from the home page or menu.
2. Select a milestone.

> **Note**
>
> Look for in the Journey navigation menu to quickly identify milestones.

View Milestones and Assessments in a Program or Project

To view milestones and assessments in a program or project:

1. Start from the home or Programs page.
    - From the Programs section on the home page, select the program or project you're interested in.

- On the Programs page, select the program or project you're interested in.

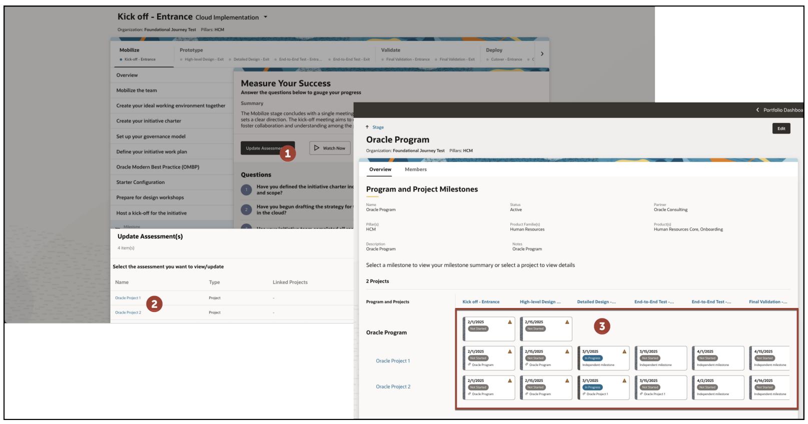
2. Select a milestone.

Update Assessments

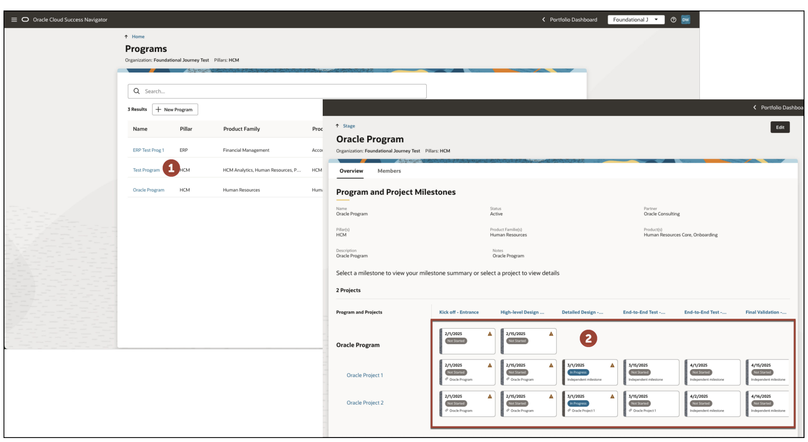
Admins and Team Members who are also part of the program or project team can update assessments to answer questions or add notes.

To update an assessment:

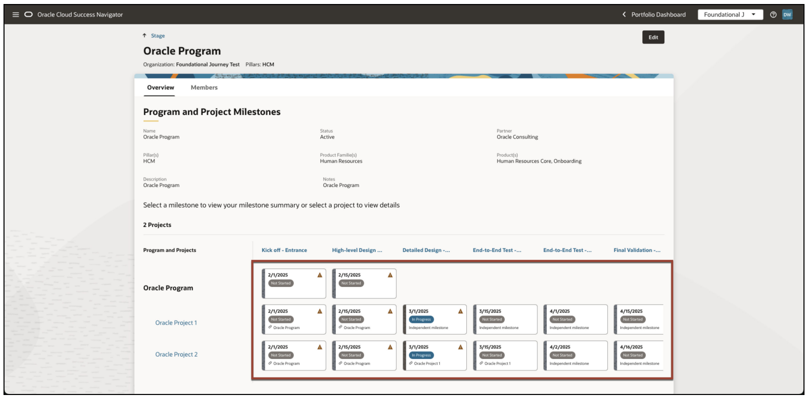
1. Start from the home or Programs page.
   - From the Journey, select a milestone, select **Update Assessment**, choose a program or project, and then select the milestone to update on the Program and Project Milestones page.



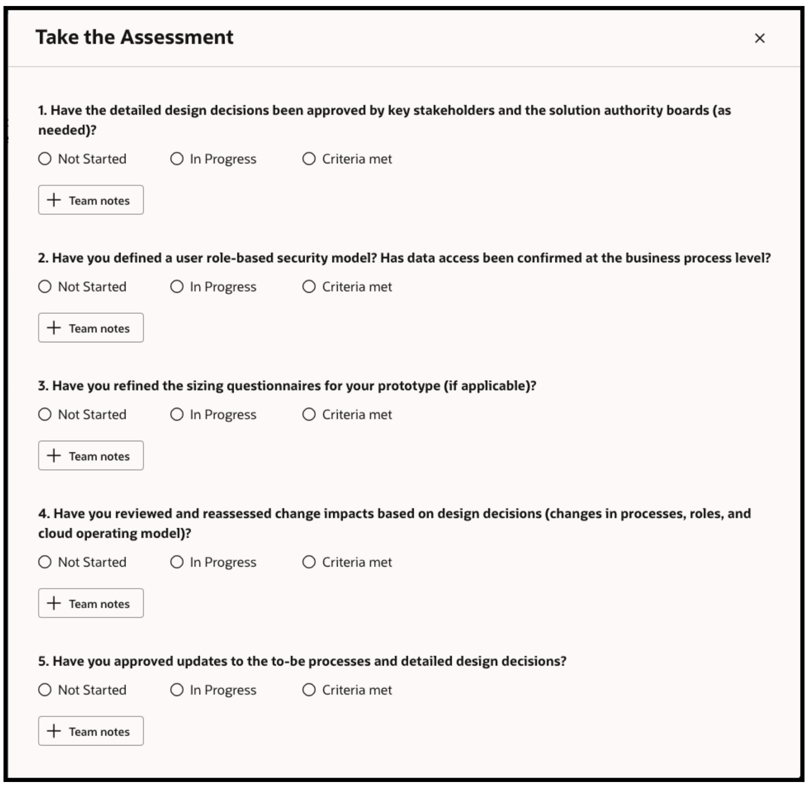
   - On the Programs page, select the program or project you're interested in, and then select the milestone to update.



   - On the Program and Project Milestones page, select the milestone to update.



2. Select **Start Assessment** or **Edit Assessment**.
3. Select the status and add Team Notes as needed.



4. Select **Save and Close** when finished.

Oracle Modern Best Practice (OMBP) and Key Features

Oracle Modern Best Practice (OMBP) and Key Features help you discover curated OMBPs by viewing the Key Features associated with each OMBP activity. This experience shows how features, including AI enabled innovations, map to OMBP activities and drive business outcomes.

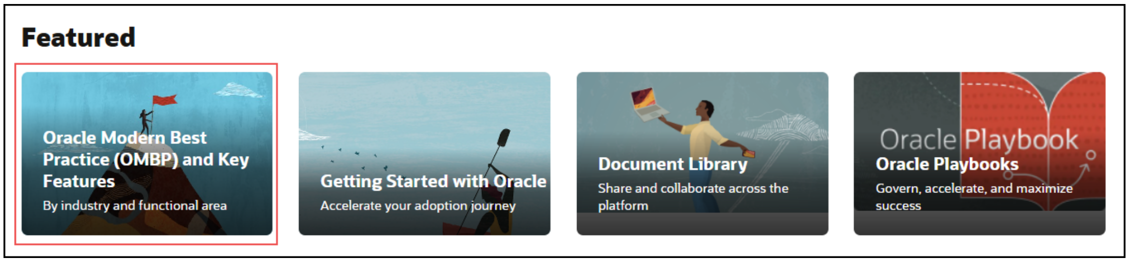
Use the **Oracle Modern Best Practice (OMBP) and Key Features** page to explore curated, end-to-end business processes by **industry** and **functional area**. From this page you can:

- Filter and browse OMBPs.
- Open an OMBP to review its description and activities.

- View **Key Features** associated with each activity, including effort and impact indicators and supporting assets.

Access Oracle Modern Best Practice (OMBP) and Key Features

To access from the home page, scroll to the Featured section, and then select **Oracle Modern Best Practice (OMBP) and Key Features**. You can also select Oracle Modern Best Practice on the application menu.



Explore OMBPs

Use this page to discover OMBPs relevant to your organization:

- Select an **Industry** to view OMBPs aligned to your business domain Note: By default, the Industry value is set to Cross-Industry. You can change the selection as needed.
- Select a **Functional Area** to focus on specific business functions.

Based on your selections, the page displays a list of OMBP cards. Each card includes a short description and a **Learn More** option.

> **Note**
>
> By default, all OMBPs are displayed for the Cross-Industry selection. You can use the dropdown to select an industry and view a filtered list.

Review OMBP Activities

Select **Learn More** on an OMBP card to open the OMBP details page. This page displays the activities that make up the OMBP.

For each activity, you can:

- Review a description of the activity.
- Understand its role in the overall process.
- See the number of associated Key Features.

> **Note**
>
> If no key features are associated, the activity tile is not clickable. If one or more key features are available, the tile becomes clickable and opens the Key Feature summary page.

Select an activity to explore the supporting capabilities.

Understand Key Features

Key Features highlight the most impactful Oracle Fusion Applications capabilities, including AI-enabled innovations.

Each Key Feature includes:

- A description of the capability.
- The associated product and role.
- Effort and impact indicators.
- Supporting assets such as videos or documentation.

Key Features help you:

- Identify capabilities that support specific activities.
- Understand how features enable business outcomes.
- Prioritize adoption based on value.

Key Features are:

- Curated and updated through regular governance with Product Management.
- Focused on high-impact features and value realization.
- Designed to support continuous transformation before, during, and after go-live.

Use Key Features for decision-making

Key Features provide a simplified way to evaluate and adopt Oracle capabilities:

- Review how features support OMBPs.
- Understand value propositions and expected outcomes.
- Identify AI-enabled capabilities relevant to your organization.
- Support planning and prioritization decisions.

Getting Started with Oracle

The **Getting Started with Oracle** section brings together key guidance and resources to help you begin your journey with Oracle Cloud Applications. It helps you understand initial setup, activate services, and navigate essential processes as you start using your environment.

Highlights of Getting Started with Oracle include:

- **Fusion Onboarding**
  Provides access to onboarding tasks to help you set up and get started with your environment.
  - Review assigned tasks to understand required setup activities.
  - Add notes and track progress during onboarding.
    For more information, see Fusion Onboarding.
- Activation and provisioning
  Provides guidance to help you activate services and configure your environment.
  - Learn about **process flows** across activation, provisioning, and administration.
  - Understand key **activation steps** and prerequisites.
  - Follow **provisioning guidance** to set up services.
  - Explore activities related to **administration**.

For more information, see Activation and Provisioning.

Fusion Onboarding

The Fusion Onboarding page is a crucial starting point and valuable resource for customers implementing Oracle Fusion Applications. It identifies helpful tasks and provides access to key resources for optimizing your Journey experience.

Fusion Onboarding is organized by role (for example, Account Administrators and Project Team), so users can quickly find the tasks and resources most relevant to them. It's best used immediately after subscription purchase/provisioning and throughout the early implementation phase to confirm readiness and keep onboarding activities on track.

In Fusion Onboarding, you can:

- Explore important tasks and resources to begin your Oracle Cloud journey.
  Get guided, role-based task lists (such as environment activation/provisioning, provisioning workflow guidance, and initial readiness activities) with recommended timing to help you prioritize early actions.
- Manage task progress by updating task statuses to track completion and readiness.

  > **Note**
  >
  > Only administrators can update task statuses.

- Add and review team notes to capture updates, decisions, and context for onboarding activities.

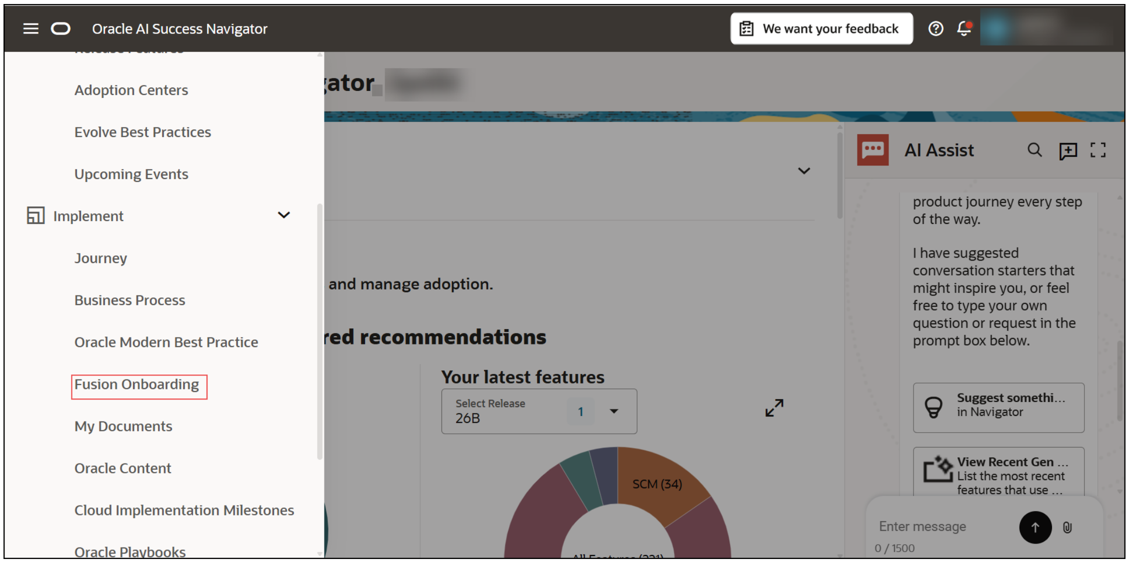
  > **Note**
  >
  > – When updating a task status, administrators are required to add a team note.
  >
  > – All users can view task statuses and team notes.

- Access learning paths to help you get started.
  Follow curated onboarding learning paths designed to build foundational product knowledge for your implementation team and administrators.
- Find links to support onboarding with Oracle Cloud Applications.
  Use direct links to key support resources (for example, My Oracle Support) to search knowledge, manage service requests, and ensure your support identifiers/access are in place.
- Register with Oracle Cloud Customer Connect.
  Join the community to ask questions, review product information, learn from other customers, and **participate in complimentary educational events** and discussions that support your onboarding and adoption.

Access Fusion Onboarding

You can access Fusion Onboarding from the home page or the menu at the top of the page.

- To access Fusion Onboarding from the home page, scroll to the **Implement** section and select the **Getting Started with Oracle** tile. From there, navigate to **Fusion Onboarding**.
- To access Fusion Onboarding from the menu, open the menu and select **Fusion Onboarding**.



Work with Onboarding Tasks

Fusion Onboarding displays tasks organized by user group. Each task provides details, status, and related resources to help you complete onboarding activities.

When you select a task, a detailed view opens where you can review steps, update status, and add notes.

> **Note**
>
> Administrators can update task status, add team notes, and edit their own updates. They cannot edit notes or statuses created by other users. All other users have view-only access to task status and team notes.

Manage Statuses and Add Team Notes

You can track progress and provide context for onboarding tasks by updating statuses and adding team notes.

> **Note**
>
> Only administrators can update task statuses and add team notes. All users can view task statuses and notes.

To manage statuses and add team notes:

1. Navigate to the **Fusion Onboarding** page.
2. Select a task.
3. In the task details panel, review the current **status**.
4. Update the **status** as needed.
5. Select **Team Notes**.

6. Enter a note to provide context for the update.
7. Save your changes.

Review Task Details and Steps

Each onboarding task includes detailed guidance and supporting resources.

To review task details:

1. Navigate to the **Fusion Onboarding** page.
2. Select a task to open the details panel.
3. Review:
   - Task description.
   - Process steps (for example, activation and provisioning steps).
   - Status and progress.
4. Explore links under **Additional resources** for more information.

Activation and Provisioning

The Activation & Provisioning page provides guidance to help you activate Oracle Cloud services, configure your environment, and manage ongoing setup activities. It brings together process flows and step-by-step guidance to support your cloud setup journey from initial activation through administration.

Overview

Activating and provisioning your cloud services early enables immediate access to tools and resources, helping your organization achieve faster and more effective outcomes.

Benefits of early activation and provisioning include:

- Accelerate project timelines with instant access to services.
- Start innovating sooner with ready-to-use cloud resources.
- Reduce onboarding delays and administrative delays.
- Enable teams to collaborate efficiently from day one.

Explore activation and provisioning activities

Use this section to understand how setup activities are organized across the lifecycle of your cloud environment.

Process flow

The process flow provides a high-level view of the Oracle Cloud subscription journey.

It helps you understand how activities are connected across:

- Service purchase and contract processing.
- Activation and provisioning.
- Ongoing administration and management.

Use the process flow to understand the sequence of steps and dependencies across the setup lifecycle.

Activation

Activation includes the steps required to enable Oracle Cloud services and prepare them for use.

Use this section to:

- Review key activation steps and prerequisites.
- Understand how services are enabled.
- Ensure your environment is ready for provisioning.

Provisioning

Provisioning includes the steps required to configure your environment after activation.

Use this section to:

- Set up services and required components.
- Configure applications based on your business needs.
- Complete setup activities required for usage.

Administration

Administration includes ongoing activities required to manage and maintain your cloud environment.

Use this section to:

- Manage configurations and updates.
- Monitor and maintain your environment.
- Support ongoing operations after provisioning.

5

Starter Configuration

The Starter Configuration is a ready-to-use configuration that showcases how end-to-end business flows work in Oracle Fusion Cloud Applications. It includes predefined configurations, sample data, and role-based user experiences built on Business Processes. Success Navigator includes two types of Starter Configuration:

- Read-only Starter Configuration that you can explore to safely experience end-to-end workflows using sample data. No changes are saved, allowing you to freely navigate and understand process flows without impacting the environment. Use predefined roles to explore key business scenarios, review transactions, and follow guided prompts to replay use cases step by step.
- Starter Configuration which can be applied to one of your dev and test environments. Use it to validate business flows with your own data. You can also personalize it by adding your organization’s data, such as company name, employees, suppliers, customers, and items, to create a more tailored experience.

Starter Configuration helps you get started quickly by enabling you to explore business processes, validate scope, and align on key decisions before building your own configurations.

Use the Success Navigator home page to find and begin working with Starter Configuration.

Where to begin

From the home page:

- Select **Learn about Business Processes** to explore business processes, personas, use cases, and leading practices.
- Select **Starter Configurations** to open the Starter Configuration topic in the journey, where you can explore or request a Starter Configuration.
- Use the **Configurations** section to view the Starter Configurations you’ve requested and track their status.

Choose how to get started

After you open the Starter Configuration journey topic, you can begin in one of the following ways:

- **Learn about the configuration**:
  Review the business processes behind the Starter Configuration, including role-based personas, leading practices, and embedded KPIs and reports. Use videos, diagrams, and step-by-step guides to understand key use cases.
- **Explore the configuration**:
  Open the read-only Starter Configuration to experience end-to-end workflows using sample data. Use predefined roles to review transactions, explore key business scenarios, and follow guided prompts.
- **Request a configuration for your environment**:
  Request a Starter Configuration for your development or test environment to validate business flows with your own data. You can personalize it by adding your organization’s data—such as company name, employees, suppliers, customers, and items.

Guided Learning and AI Support

Enhance your experience with **Success Navigator**, which provides access to resources such as process diagrams, videos, and step-by-step guidance. These resources help you understand business process models, personas, and use cases.

Use AI Assist for Business Process to interact using natural language. You can:

- Discover relevant business processes tailored to your needs
- Identify leading practices to optimize your setup
- Explore KPIs and reports to measure outcomes
- Get guidance on next steps

You can choose from suggested prompts or enter your own questions.

Key benefits of Starter Configuration:

- Experience best-practice business flows end-to-end before getting into the design discussions with your implementation partners.
- Accelerate implementation with ready-to-use scenarios and sample data
- Improve stakeholder alignment with shared processes, personas, and KPIs
- Learn in context with embedded guidance and process walkthroughs
- Use AI-driven insights to explore and refine business processes

Oracle Fusion Cloud Application Support

Starter Configuration includes these Oracle Cloud Applications:

- Oracle Fusion Cloud ERP: Financials, Projects, Assets, Payables/Procure-to-Pay, Receivables/Order-to-Cash, Cash Management, Revenue Management, Grants, and Expenses are represented through role-based scenarios and seeded data.
- Oracle Fusion Cloud HCM: Core HR, Talent Management, Workforce Management (time, scheduling, absence), Payroll, Benefits, Learning, Help Desk, and Health & Safety are represented through role-based scenarios and seeded data.

> **Note**
>
> For more information on Oracle Cloud Applications and country specific features, refer to the following document Starter Configuration Reference

Scope and Highlights

The Starter Configuration provides a ready-to-use environment within your Oracle Cloud Applications test environment for exploring business processes. It includes predefined configurations, sample data, and role-based access to support hands-on evaluation of end-to-end business flows.

Scope

Capability	Read-only Starter Configuration	Starter Configuration
Access to preconfigured business flows		
Predefined configurations based on Oracle leading practices		
Sample master and transactional data		
Pre-created user accounts for business roles		
Empty dev or test environment		
Personalization (company branding)		
Upload of employees, suppliers, customers, and items		
Oracle Guided Learning (in-application guidance)		
Integration with Success Navigator		

> **Note**
>
> Read-only Starter Configuration is intended for exploration only. Deployed Starter Configuration is intended for evaluation, demonstration, and training purposes and is not designed for production use.

Highlights

Starter Configuration enables you to explore, understand, and interact with business processes in a guided environment.

- **Learn business processes**
  Access embedded content such as process flows, persona-based scenarios, use cases, leading practices, and KPIs.
- **Explore end-to-end workflows**
  Navigate business flows using sample data in a read-only environment. Review transactions and understand how processes are executed across roles.
- **Replay guided scenarios**
  Use predefined user roles and Oracle Guided Learning to follow step-by-step instructions and replay key business scenarios.
- **Tailor the experience**
  Add selected organizational data and configurations to make the environment more relevant to your business context.

Learn about Business Processes

Success Navigator provides access to **Business Processes** through the Learn about Business Processes experience.

Which illustrates common business processes optimized to take advantage of Oracle Cloud Applications and technologies. These business processes are embedded in the Starter Configurations that you can request and explore in Success Navigator. Business process in Success Navigator helps familiarize yourself with the learning content relevant to your project's scope.

This helps you understand business process models, personas, use cases, leading practices, and KPIs for the selected business processes.

The learning content is designed to help you understand these business processes and apply them as you explore Starter Configuration.

Business Processes in Success Navigator

Use Success Navigator to learn and understand business process models, personas, use cases, leading practices, design decisions, and KPIs through:

- Detailed business processes aligned to your Starter Configuration
- Overview and training videos for business processes
- Process diagrams across different levels
- Step-by-step guides for Level 3 processes
- Persona definitions and associated responsibilities
- Leading practices and reporting insights
- Country-specific content (for example, US, IN, UK) based on your selected countr

When to Use the Learning Content

You can use this content at different stages of your experience:

- **Before exploring**: Review business process descriptions, diagrams, and videos to understand flows, roles, and key activities
- **During exploration**: Use step-by-step guides to follow and replay business scenarios in the Starter Configuration
- **After exploring**: Refer to KPIs, reports, and leading practices to validate outcomes and support decision-making

Access Business Processes

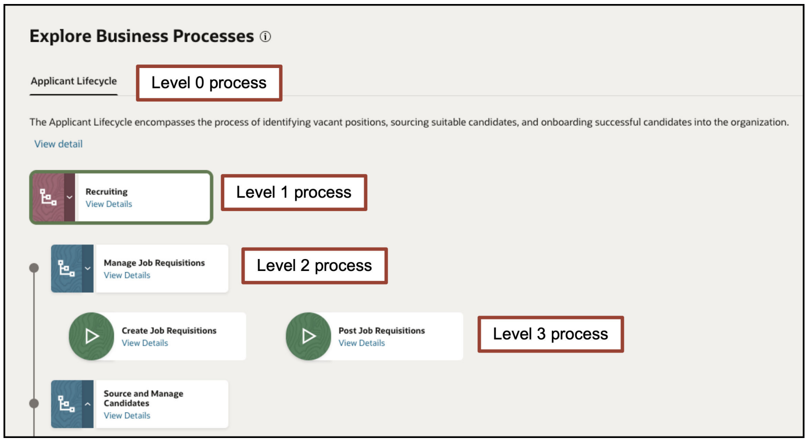
You can access Business Processes from the home page or the menu.

- To access Business Processes from the home page, select **Learn about Business Processes** in the Implement section.
- To access Business Processes from the navigation menu, select Business Processes.

Access Business Process Details

The business processes are categorized as:

- Level 0
- Level 1
- Level 2
- Level 3



To access process details

1. Access Business Processes.
2. Select your Pillar and Country.

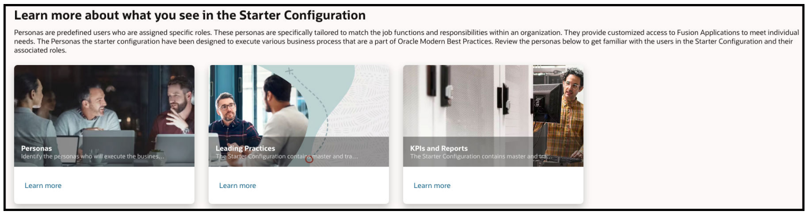
> **Note**
>
> Level 3 processes, Personas, and Leading Practices include country-specific content identified by a country tag. If the Country you select here includes localized content, you'll see the associated country tag.

3. Scroll down to the Business processes section, and then select **View Details** for the business process you want to explore.
4. At the top of the page, view the process diagram and video for the high-level business process.
5. Select the Level 0 process if more than one are available.
6. Select **View Details** on a Level 1 process to see a description of the process.
7. Select **View Details** on a Level 2 process to see short descriptions, process diagrams, or videos with more details.
8. Select **View Details** on a Level 3 process to see a use case description, videos, step-by-step guides.

Learn About your Starter Configuration Personas, Leading Practices, KPIs, and Reports

Business Process includes important information about your Starter Configuration. To access the information, click Learn More on the related topic at the bottom of the Business Process page.

> **Note**
>
> The Personas listed are all US tagged personas which align with personas referenced in business process training videos.

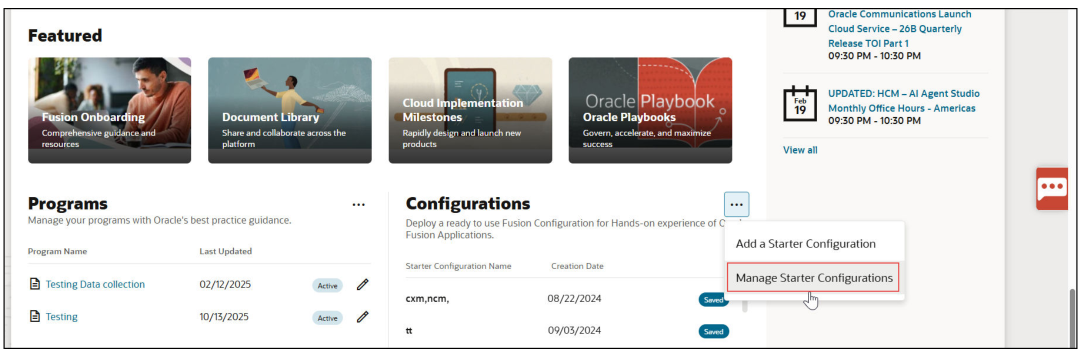


Access a Deployed Starter Configuration

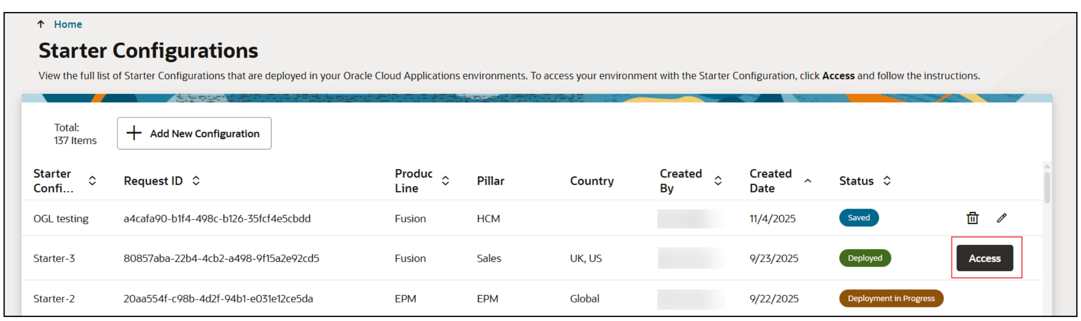
When your Starter Configuration is deployed and ready for use, you'll receive an email from Success Navigator. This email will include instructions on how to access your environment. To log in, use the default password you provided while requesting the Starter Configuration, and be sure to change it immediately after your initial login.

Step 1: Navigate to the access page

1. Go to the **Manage Starter Configurations** page. On the home page, select ⋯ in the Configurations section, and then select **Manage Starter Configurations**.



2. Select **Access** for any Starter Configuration that has **Deployed** status.

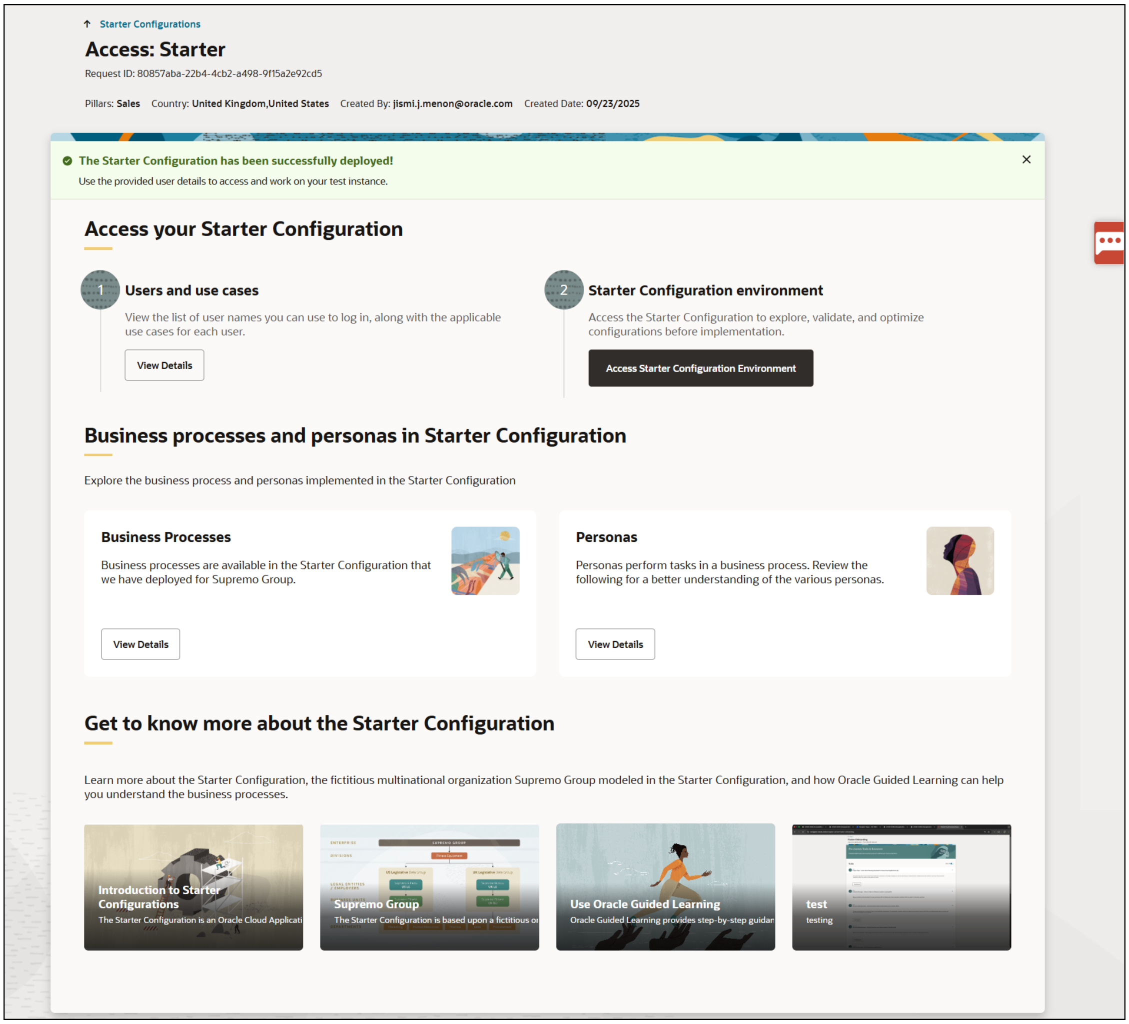


Step 2: Review Business Process and personas used in Starter Configuration

On the Starter Configuration Access page, take some time to familiarize yourself with the business processes and Personas. These help you:

- Understand the key business processes and workflows configured according to Oracle's leading practices.
- Identify the roles (personas) and scenarios each user is designed to support.

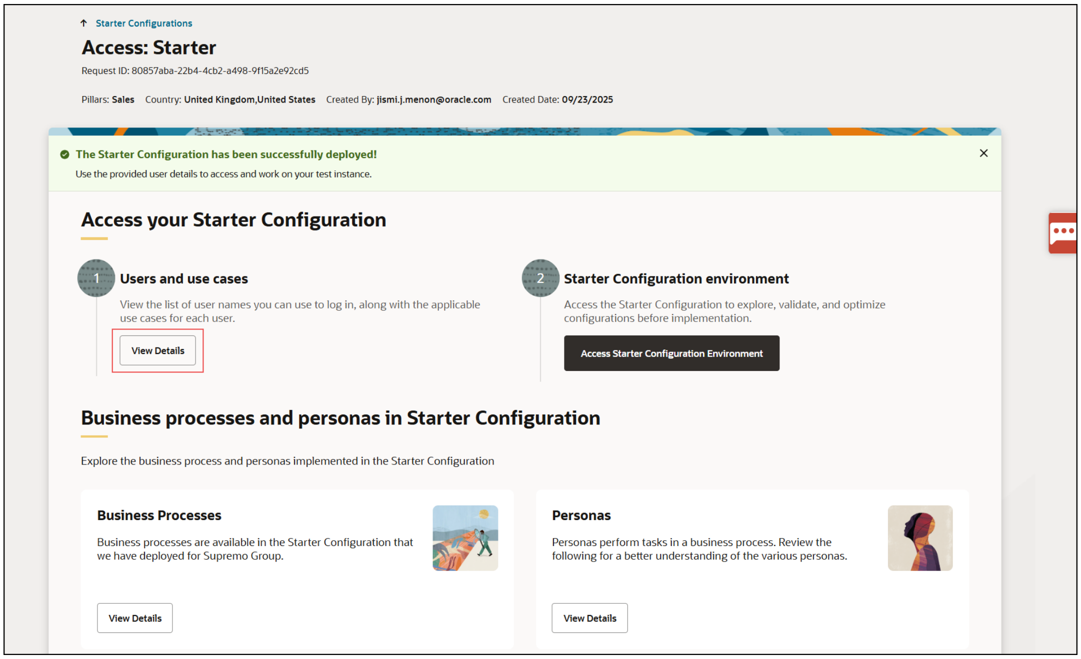
- Use the predefined personas and use cases to validate processes and tailor testing to your organization's needs.
- Gain insights into the best practice processes configured in the environment and to align testing with relevant user roles and scenarios.



Step 3: Identify users by use cases or Business Process

You can find the list of users designated for each use case or OMBP configuration.

1. Review the **Use Cases** section to view user names and the use cases associated with each user.



2. Capture the user names associated with the use cases or business process you plan to test.

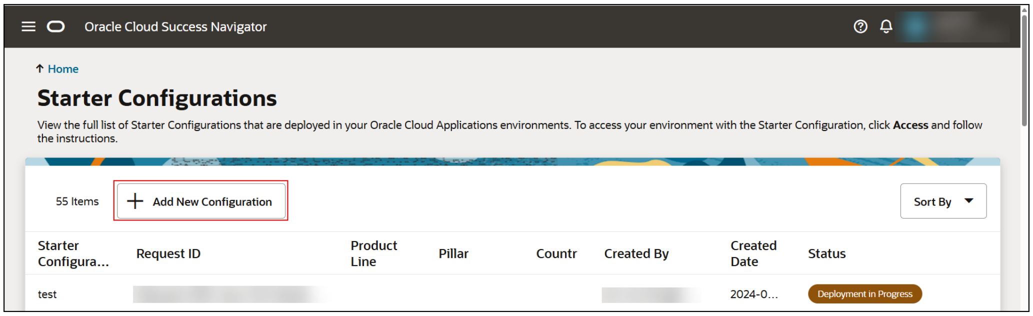
> **Note**
>
> You'll use the user name and the password set up during the initial Starter Configuration request.

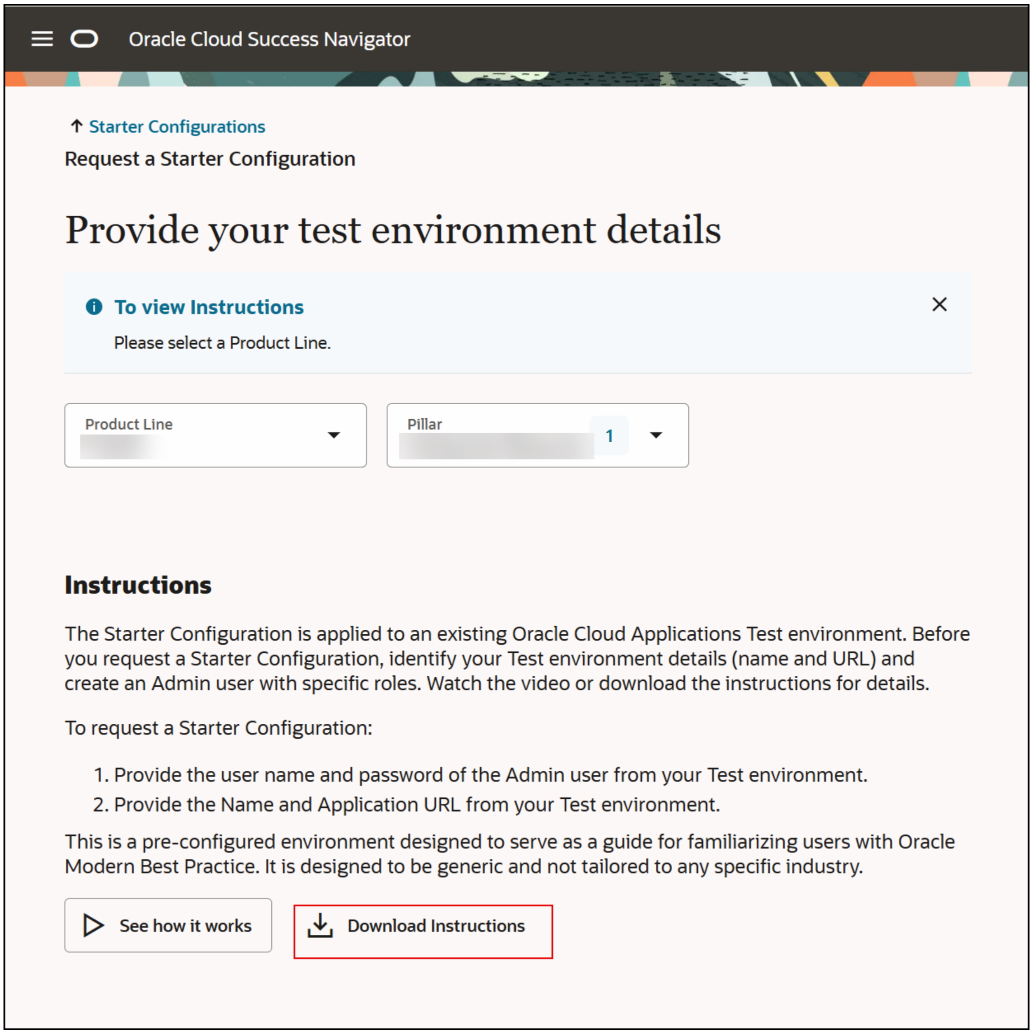
3. When ready, select **Access Starter Configuration**.
4. Sign in using the password set up when you requested the Starter Configuration.

Log in to the Environment

Once the deployment of the Starter Configuration in your Test environment is complete, you will be notified via email. To access the configuration:

1. Log in to the **Success Navigator**.
2. Select **Add New Configuration** to begin the configuration process. On the **Provide Your Test Environment Details** page.
   - Select the **Product Line** and **Pillar**.
   - Once the product line and pillar are selected, the download option within the instruction section will be enabled, allowing you to download the Starter Configuration instructions document for further reference.





Access Read-only Starter Configuration

The read-only Starter Configuration allows you to explore **business processes** in a preconfigured environment using sample data and predefined user roles.

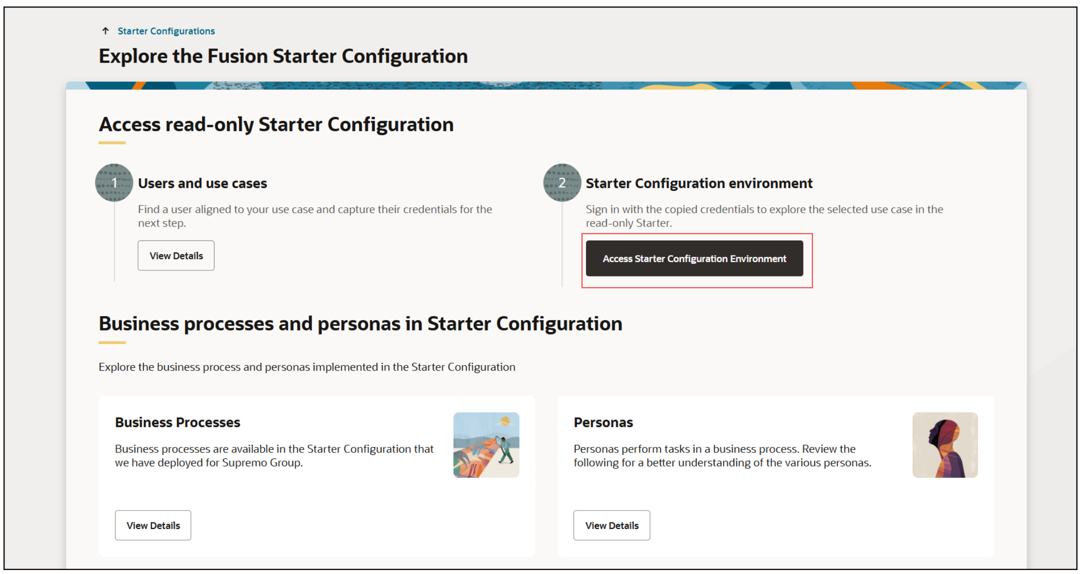
Unlike a deployed Starter Configuration, the read-only environment does not save any changes, enabling you to safely navigate and understand end-to-end business flows.

Use the read-only Starter Configuration to:

- Explore end-to-end business processes without impacting data.
- Understand how roles (personas) interact across workflows.
- Replay predefined business scenarios using sample data.
- Familiarize yourself with the application before requesting your own environment.

Access the read-only Starter Configuration

1. Go to the **Explore the Fusion Starter Configuration** page.
2. Select **View Details** under **Users and use cases**.
3. Identify a user aligned with your scenario and note their **User Name**.
4. Select **View Credentials**, and then select **Copy Password**.
5. Return to the previous page. Use the browser back button or < in the Users and Use Cases header.
6. Select **Access Starter Configuration Environment**.



7. Sign in using the copied user credentials.

Explore business processes

Once signed in, you can:

- Navigate end-to-end business flows.
- Review transactions and process steps.
- Use Oracle Guided Learning to follow guided scenarios.
- Explore how different personas perform tasks across processes.

Key characteristics of read-only Starter Configurations

1. Changes are not saved.
2. Uses predefined configurations and sample data.
3. Provides access to predefined users and use cases.
4. Does not support personalization or data upload.

Request Starter Configuration

Starter Configuration is fast to set up. Request deployment to your Test environment, sign in with the predefined personas, and run end-to-end flows based on business processes without initial configuration.

Before requesting a Starter Configuration, be sure to read and understand the information in the Starter Configuration Journey topic. It provides details about Starter Configurations, how to use them to visualize business processes, and how they demonstrate Oracle's leading practices.

Request a Starter Configuration

Requesting a Starter Configuration is a multi-step process where you review begin the request in the Journey, and then on the Request a Starter Configuration page provide your instance details, personalize the data, and finalize the deployment.

The Request a Starter Configuration page includes these steps:

- Provide your Test environment details—Start at this step by selecting product line and pillar, get access to enablement resources, and provide dev or Test environment information.
- Personalize enterprise information—Personalize the enterprise section with your organization details to tailor the starter configuration environment to your enterprise context. You can also review the default values from this page. Personalization is optional, and you can proceed with the default values if you want.
- Choose country and personalized master data—Select the countries and tailor master data settings as needed to match your organizational and regional requirements.

  > **Note**
  >
  > Country selection will be skipped in the case of EPM.

- Preview and deploy—Before you complete the request, review your selections and go back if needed.

  > **Note**
  >
  > Personas and use cases are tailored based on the country you select.

To request a Starter Configuration:

Go to the Journey

Starter Configuration requests begin in the Journey. Review the information available from this page before you begin the request process.

1. Start from the home page or the menu.
   - On the home page, select in the Configurations section, and then select **Add a Starter Configuration**.
   - On the menu, select **Starter Configuration**.

2. Review the content and video on the Starter Configuration page in the Journey.
3. When ready, select **Request a Starter Configuration** in the top section.

Step 1: Provide your Test Environment Details

The Request a Starter Configuration page includes four steps: Provide your Test environment details, Personalize enterprise information, Choose country and personalize master data, and Preview and deploy. In the Provide your Test environment details step, you'll define the type of Starter Configuration (product line and pillar), get access to enablement resources, and provide Test environment information.

1. On the Request a Starter Configuration: Provide your Test environment details step, select a **Product Line** and one or more **Pillars**.
   After selecting these items, the Instruction section updates to provide tailored assistance based on your selections.

   > **Note**
   >
   > - Multiple pillars can be selected only for a single Product Line.
   > - The CPQ pillar is designed with an inherent dependency on Sales, so you must provide both CPQ and Sales details to initiate a CPQ starter.

2. Download and read the instructions and watch the video.
3. Add the credentials from your Test environment.
4. Add required URLs.
   - For Fusion products, enter the the Application URL of your Test environment.
   - For EPM, add up to 5 unique, valid test environment URLs corresponds to a product within EPM like ARCS, FCC, NR etc.
     – Each test URL must be unique and valid.
     – Narrative Reporting needs Financial Consolidation and Close.
   - For other product lines (such as OTM, WMS): Provide the appropriate test environment URLs.
5. Enter a default password for the Starter Configuration personas.

   > **Note**
   >
   > - The default password entered is securely stored and will be required for post-deployment login. Users are prompted to save this password, and a reminder is displayed on the Access page.
   > - This may not be applicable for some product lines, for example, OTM, EPM, etc.

6. Enter the name for your Starter Configuration.
7. Address any validation errors before moving forward.
8. Select **Continue** to proceed with personalization.

Step 2: Personalize Enterprise Information

1. On the Personalize Configuration step you can edit various aspects of the Starter Configuration depending on the pillar you selected. Examples include the enterprise name, enterprise logo, persona names, and profile pictures. Select Edit make your changes, and then select Update.
2. Select **Continue** to proceed with country selection.

Step 3: Choose Country and Personalized Master Data

1. On the Choose country and personalized master data step, select the countries to customize your starter configuration.
2. After country selection, you can personalize various aspects of the Starter Configuration related to your selected pillars and countries.
3. Select **Continue** to preview the setup and deploy.

> **Note**
>
> Country selection will be skipped in the case of EPM.

Step 4: Preview and Deploy

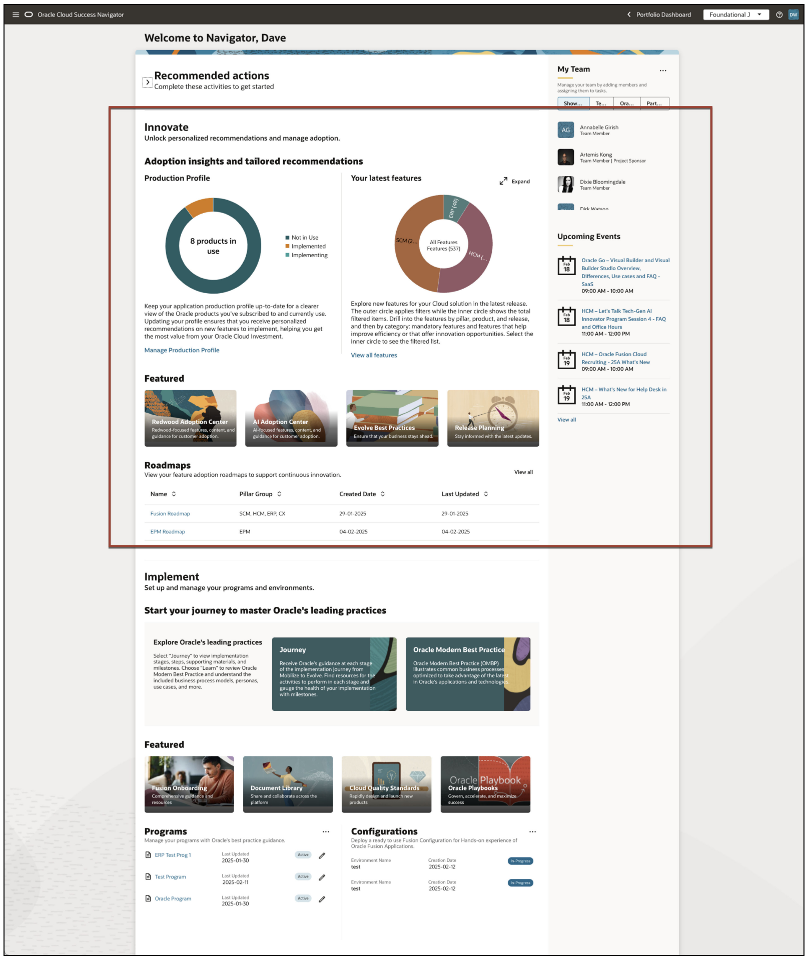
1. On the Preview and Deploy step, review your setup.
2. When ready, select **Deploy**.

After making the request, you'll see a message that includes a link to the Starter Configurations page. After requesting deployment, your request remains in an In Progress status until it completes. Once complete, the status updates to Deployed, and an Access button displays.

Stay informed about the status through the status emails you'll receive, in the Configurations section of the home page, and on the Starter Configurations page.

6 Innovate and Operate

Oracle Cloud Success Navigator helps you run and operate your Oracle applications with the tools and guidance you can find in the Innovate section of the home page.



- Release Planning
- Assess and Adopt Features
- Roadmaps
- Adoption Centers
- Evolve Best Practices

Update Planning Center

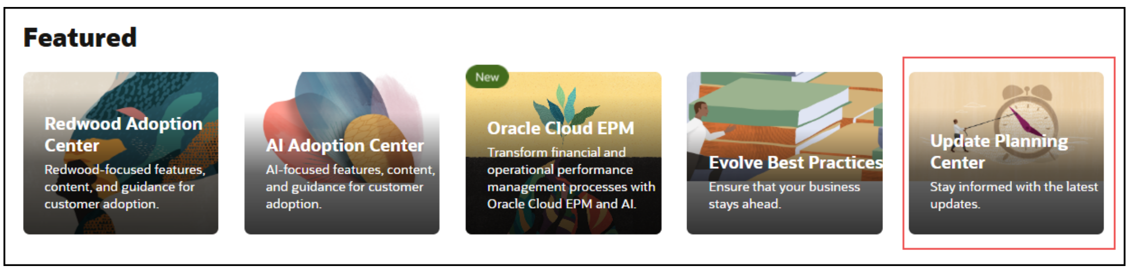
The **Update Planning Center** in Success Navigator provides all the information you need to stay on top of regular updates. The Update Planning Center includes:

- **Release Readiness**—Review updates for a selected release and product family (for example, Fusion or EPM). Use search and filters to find relevant updates and focus on what's enabled and applicable to your environment.
- **Adoption Roadmap**—Plan and track feature adoption across product areas. Search and filter features, add items to your roadmap, and organize work using the roadmap timeline (for example, Now, Next, and Later).
- **Release Guidance**—Access guidance to help you plan for recurring updates. This tab includes **Upcoming Releases** (such as release events and important dates), information on **Fusion and EPM update cycles**, and recommended **planning strategies** for managing your update schedule.

Area	Purpose	Best For
Release Readiness	Review mandatory and expiring features in a release	Preparing for required changes
Adoption Roadmaps	Plan and track optional feature adoption	Organizing adoption work across teams
Release Guidance	Learn how Oracle updates work and how to prepare	Building update strategies and timelines

Access Update Planning Center

To access Update Planning Center from the home page, scroll to the Featured area in the Innovate section, and then select **Update Planning Center**.



Release Readiness

The **Release Readiness** page provides a consolidated view of all mandatory and opt-in expired features included in a specific release. It helps you focus on the updates that require action to prepare your environment for the release.

By default, the page is filtered to show features from the latest release based on your production profile, ensuring you are viewing the most relevant updates.

Use the Release Readiness page to:

- View all **mandatory and opt-in expired features** for the selected release.
- Focus on updates that require action before or during the release.
- Search and filter features by product, module, category, or impact.
- Review feature details such as status, priority, due date, and assignment.

Take Action on Features

You can manage features directly from this page, similar to how you work in the roadmap.

For each feature, you can:

- Update the **status**.
- Assign **owners**.
- Set **due dates**.
- Add **tags** or other relevant details.

This allows you to track progress and ensure all required updates are addressed.

Plan with Release Readiness and Adoption Roadmap

Release Readiness and Adoption Roadmap serve different purposes:

- Use **Release Readiness** to:
  - Focus on **release-specific updates.**
  - Track mandatory and opt-in expired features.
  - Ensure readiness for the upcoming release.
- Use **Adoption Roadmap** to:
  - Plan for **optional features and innovation.**
  - Manage long-term adoption and enhancements.

You can add features from Release Readiness to your roadmap when needed, but Release Readiness provides a focused view of what must be addressed for a release.

Adoption Roadmaps

Adoption Roadmaps help you align feature adoption with your organization's goals and timelines. By providing a single place to explore new features, plan adoption activities, and track progress, Adoption Roadmaps enable you to prioritize updates, monitor key initiatives, and adjust your approach as needs evolve, all within the context of your ongoing planning.

How Adoption Roadmaps Foster Collaboration

Designed for teamwork, you can comment, tag, assign features to team members, clone features, update statuses, and set due dates, making it easy to coordinate with your team and keep everyone informed.

Flexible Planning to Match Your Workflow

Adoption Roadmaps support a variety of planning styles. Organize features in either a Kanban or list view, move features between categories, rename categories, search and filter for key items, and download the filtered feature list so you always have the information you need. You can also view the activity history for any feature to keep track of changes.

Plan with Adoption Roadmaps

Adoption Roadmaps give you a central place to plan feature adoption and manage your ongoing activities. From adding features to customizing categories and exporting data, you can efficiently organize and track adoption work to fit your team's preferred methods.

Add Features to Your Roadmap

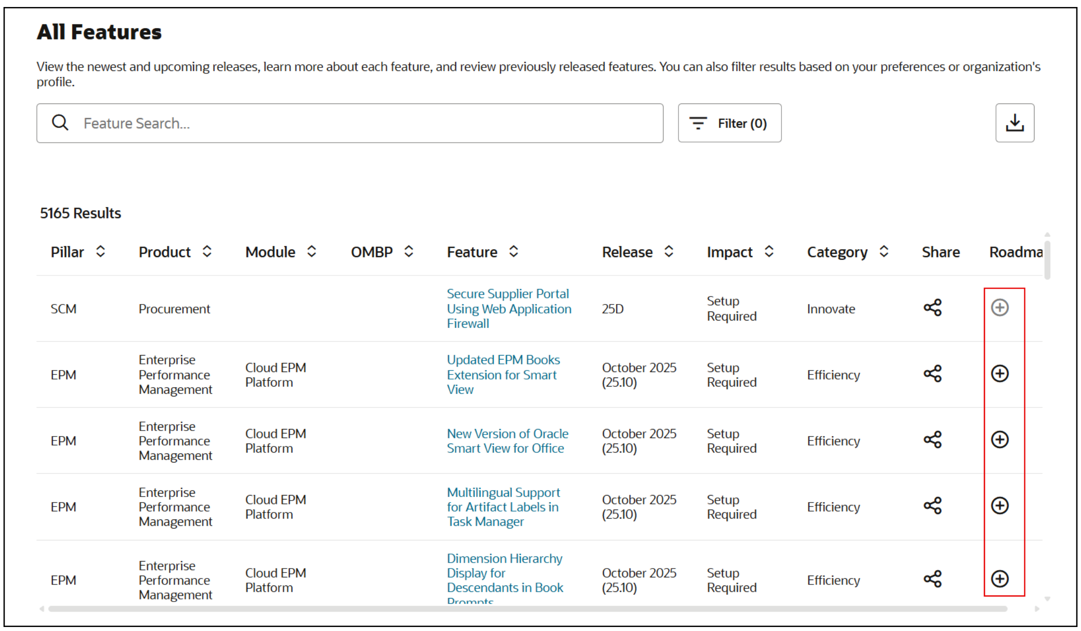
As you assess features on the Feature Innovation page or in the Adoption Centers, you can add them to your roadmap for tracking and planning. Added features appear in the Saved Features section of the roadmap.

> **Note**
>
> Only users with Admin or Production Team Member access can add features to a roadmap. Other users will not see the Roadmap column on feature list pages.

To add a feature to a roadmap:

1. Find the feature you want to add on the Feature Innovation page or in Adoption Centers.
2. In the Roadmap column, select .

   > **Note**
   >
   > If a feature is already included in a roadmap, the icon appears gray and cannot be selected.



3. Navigate to Adoption Roadmaps to find the added features in the Saved Features section of the roadmap.

Organize and Manage Your Roadmap

Manage your roadmap by categorizing, updating, and customizing features.

1. On the home page, scroll to Adoption Roadmaps in the Innovate section, and select the roadmap you want to update.
2. Switch between Kanban View and List View to organize features by your preferred view.
3. Perform any of the following actions:
   - Drag feature tiles from Saved Features–or any category–to other categories including the Not Applicable category..

- Select a feature tile, then select **Edit**. You can update the status (Completed, Not Implemented, In Progress, Deferred, or Not Applicable), assign a team member, and set a due date and manage tags or comments from a single feature details drawer. Select **Submit** when finished.

  > **Note**
  >
  > Features marked as Completed move to the Completed Features list automatically. You can select a past, present, or future due date including backdated due dates.

- Create custom items to track activities or initiatives that aren't tied to a specific feature.
- Clone features to create copies for additional planning or tracking scenarios.
- Remove features by selecting the feature tile, and then selecting **Delete**.
- Customize the column labels to fit any methodology or planning approach.
- Download the features displayed based on filters; only visible features are included in the export.

Tip: You can edit, clone or delete features directly from the Saved and Completed categories using the Edit menu ⋯ on each feature tile.

Collaborate with Adoption Roadmaps

Coordinate and communicate efficiently as a team by leveraging all collaboration features within your roadmap:

- **Assign responsibility**: Assign team members to features and set due dates to drive accountability.
- **Update feature details**: Update the status (Completed, Not Implemented, In Progress, Deferred, or Not Applicable) to keep everyone informed of progress.
- **Tag features**: Use custom tags or our system tags (Redwood and AI) to further categorize features.
- **Comment on features**: Add comments to discuss or clarify tasks, decisions, or blockers. Use @ mentions to notify individuals directly and prompt action or feedback.

  > **Note**
  >
  > Assigned or mentioned team members receive notifications in the system.

- **Track changes**: View the activity history for any feature to see updates, comments, and other actions.

To comment, tag, assign, or update feature details:

1. Select a feature tile in the roadmap.
2. Select the ellipsis on the feature card, and do any of the following:
   - Select **Edit** to update status, assign a team member, set a due date, or manage tags or add comments from the features details drawer.
   - Select **Comments** to write a comment and tag teammates using @.
3. Select **Submit** to save your changes.

Filter, Search, View, Export, and Customize

You can filter or search features to quickly find what you need, view readiness information, export your adoption roadmap, and customize your categories to support the way your team works.

Filter and Search Features

Use filters and the search function to focus on features that matter most or to quickly locate a specific feature.

To filter or search for features:

1. Select the roadmap you want to view.
2. To filter: Select **Filter** and choose your categories, then select **Apply** to view the filtered results.
3. To search: Use the search bar above the feature list to enter keywords or feature names.

View Feature Readiness Information

Review readiness details for any feature.

To view readiness information:

1. Select the feature tile.
2. Review the information in the drawer.

> **Note**
>
> To see more detail on the Oracle Cloud Applications Update Readiness page, select ↗.

Export Your Roadmap

Export your current roadmap view as a CSV file for offline review or sharing. The export respects the filters you've selected.

To export a roadmap:

1. Go to the Adoption Roadmaps page.
2. Select **Actions**, and then select **Export**.

> **Note**
>
> The exported CSV includes only the features currently visible (filtered or searched), and categories such as Feature ID, Tags, URL, and Business Benefit.

Customize Category Names

Personalize your roadmap by renaming category labels to fit your team's preferred methodology or process.

To rename a category:

1. On the Adoption Roadmaps page, select the category name you want to update.

2. Click the ellipsis (----) next to the column name.
3. Select **Rename** and enter the new label.
4. Select **Submit**.

Release Guidance

The **Release Guidance** page helps you understand and plan for recurring updates across Oracle applications. It provides general guidance and resources to help you prepare for, implement, and adopt updates effectively.

Use this page to:

- Understand how updates are delivered.
- Plan activities required before and after each release.
- Stay informed about upcoming changes.
- Align your team on update planning and execution.

Upcoming Releases

View upcoming releases and their timelines to understand when updates will be applied to your environments.

Update Cycles

Updates are delivered on a regular schedule.

- Updates are first applied to test environments.
- Production environments are updated later.
- This provides time to review and prepare for changes.

Plan your Update Activities

Use this section to:

- Understand key activities during each stage of the update cycle.
- Prepare for testing and validation.
- Plan readiness activities before updates are applied.
- Ensure your team is aligned on responsibilities and timelines.

Explore New Features

Stay up to date with the latest enhancements introduced in each release.

- Discover new features and updates.
- Understand how changes may impact your organization.
- Explore new capabilities.

Assess and Adopt Features

Use Success Navigator to view and assess upcoming and past features. You can view all features, highlighted features that showcase innovative advancements, or pre-filtered lists from the home page features interactive graphic or from the Adoption Centers.

You can access features lists in a few different ways:

- From the interactive graphic in the Innovate section of the home page.
- From the **View all features** link in the Innovate section of the home page.
- From the feature tiles in an Adoption Center.
- From the New features item in the menu.
- From the Release Planning page.

Features list pages provide a searchable and filterable list of features and the context needed to assess them, including their impact, categories (Mandatory, Efficiency, and Innovate), and release number. You can find content from Oracle Cloud Applications Update Readiness pages, access learning content available for the feature, share information, and add features to your roadmap.

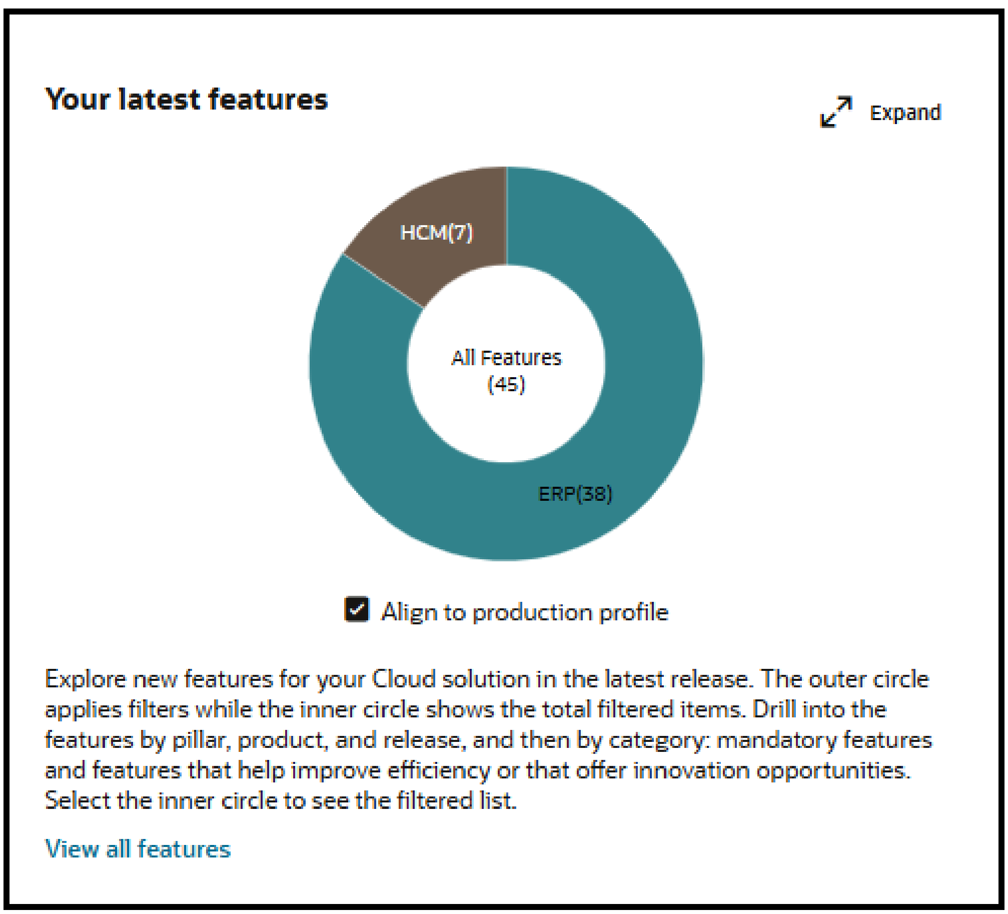
Feature Categories

All features in Success Navigator align with one of these categories:

- Mandatory: Features released enabled by default.
- Efficiency: Enhancements to existing features.
- Innovate: New functionality or features.

Using the Interactive Features Graphic

The home page includes an interactive graphic that allows you to drill into a pre-filtered features list by selecting pillars,specific products, and categories (Mandatory, Efficiency, and Innovate).

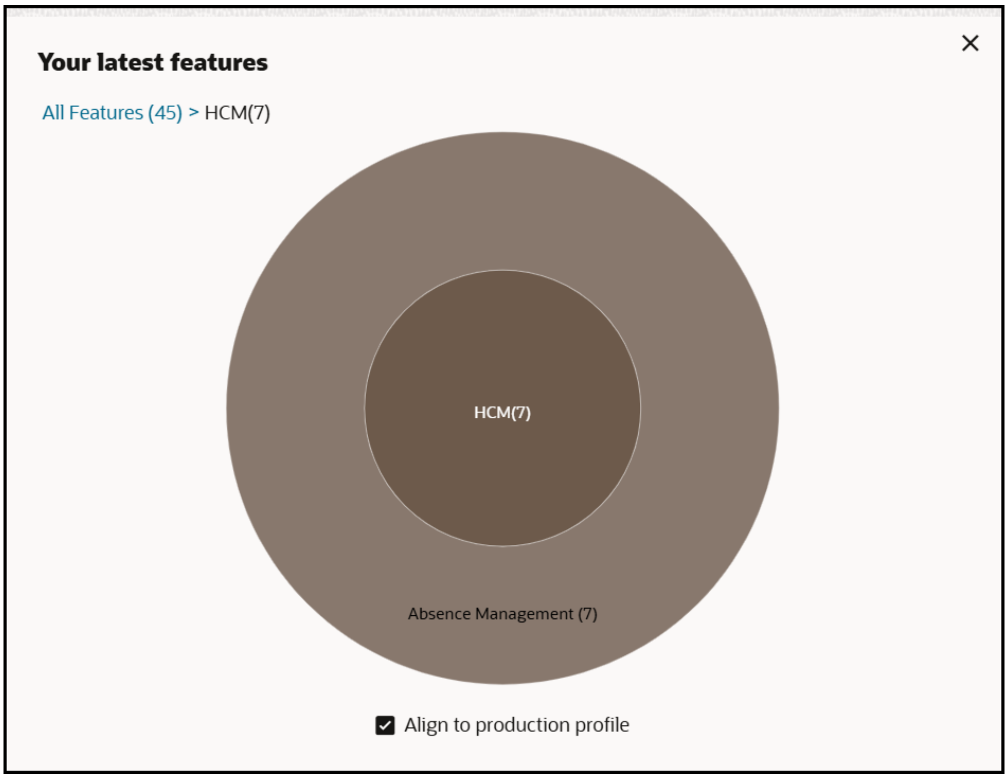


The colored outer portion of the circle defines the features in the inner circle. For example, the inner circle shows all features in the default view. If you select HCM, the inner circle shows all HCM features; then, when selecting Learning and Development, the inner circle shows all Learning and Development features, and so on. The layers of the graphic include:

1. Pillar
2. Product
3. Category

To use the interactive graphic:

1. Select **Expand** to get a better view of the labels on the graphic.
2. Drill into the graphic by selecting items in the outer part of the circle until the inner circle includes the features you're looking for.
3. Select the inner circle to view a features list filtered by your selections.



View Features Lists

Features list pages show the features that match whatever filters are applied. You can perform any of these actions on a features list page:

- Show All Features or Highlighted Features (features that showcase innovative advancements).

> **Note**
>
> Choosing Highlighted Features is not available on features lists generated from Adoption Centers.

- View readiness information for the feature.
- Filter the features list.
- Search for features.
- Share feature documentation.
- Add features to roadmaps.

View Feature Readiness Information

You can view the readiness information for any feature, including feature descriptions, enablement steps, requirements, and videos.

To view the feature readiness information

1. Select the feature title.
2. Review the readiness information in the drawer.

> **Note**
>
> If you want to explore more on the Oracle Cloud Applications Update Readiness page, select

Filter Features

You can filter features lists even if the list was pre-filtered from the home page or Adoption Centers. Manually applied filters appear as labels above the list so you can quickly see what is applied to your list.

Filtering allows you to specify:

- Pillar
- Product
- Release
- Impact
- Tags
- Category

Filter	Description
Pillar	The highest level of the taxonomy (for example, ERP, SCM, HCM, Sales, Service, or Marketing).
Product	One level below the product family. Example: The Financial Management product family contains the Financials product.
Module	A set of features within an existing product. Examples: General Ledger is a module within the Financials product. Opportunity Management is a module within the Talent Management product.
OMBP (Oracle Modern Best Practice)	Illustrates common business processes optimized to take advantage of the latest Oracle applications and technologies.

Filter	Description
Release	A named delivery or version increment in which changes (features, fixes, updates) are shipped together (often on a regular cadence, such as quarterly for SaaS).
Impact	Indicates whether a feature is delivered enabled or requires action to enable, and it highlights the expected level of impact to existing processes. For detailed definitions of each Impact value, see What do the values in Impact to Existing Processes and Action to Enable in the Readiness reports mean?.
Category	A classification label used to group features in Success Navigator for navigation, filtering, and reporting.
Tags	A label applied to an item to categorize it and make it easier to find, filter, or group with related items.

To filter features lists:

1. On a features list page, select Filter.
2. Choose the filters to apply.
3. Select **Apply**.

To clear filters, select X on the filter label or clear all filters:

1. On a features list page, select Filter.
2. Select **Reset**.
3. Select **Apply**.

Search Features

The search on the features page allows you to find your search term in the features' titles. To search for a feature, enter your search term. The list instantly matches your search term and automatically updates the list.

You can share the link to any feature's readiness content, even if they are not in your Success Navigator organization. When you share a feature, your recipient receives an email with the subject "Success Navigator Release Updates". The email includes:

- The pillar associated with the feature.
- The product associated with the feature.
- The feature name.
- A brief description of the feature.
- A Learn More link that directs the recipient to the readiness content for the feature.

To share a feature:

1. Select .
2. Enter the recipient's email address. You can enter multiple email addresses by separating them with a comma.
3. Select **Share**.

> **Note**
>
> You can copy the URL from the Feature Link window and paste it into a messaging platform or your own email.

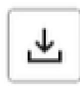
Add Features to Roadmaps

Roadmaps help you plan for feature adoption by organizing features to show which ones you're adopting now, next, and later. As you explore new features in Success Navigator, you can quickly add them to your roadmaps. For more information about roadmaps, see Roadmaps.

To add features to a roadmap, select one or more features using the check boxes, and then select ⊕.

Download Feature List

You can download the list of features in the Feature Innovation page. The download option helps you to export the features providing the ability for team members to easily review and share relevant features. The downloaded list will reflect any filters that you have selected.

To download the feature list select 

Adoption Centers

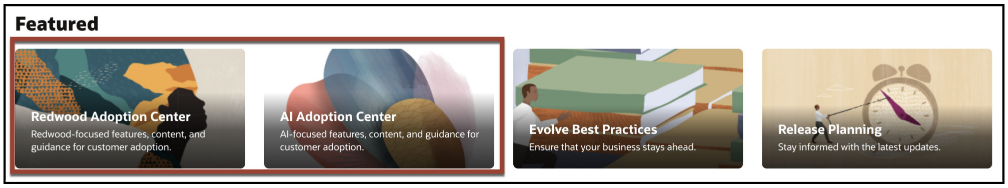
Adoption Centers provide a single source of videos, training, best practices, recommendations, and curated Cloud Application features to adopt innovative feature sets. Adoption Centers aren't informational only. Use the Adoption Centers along with Success Navigator's adoption roadmaps to plan how your organization will move to adopt these critical capabilities.:

- AI Adoption Center
- Redwood Adoption Center
- Oracle Cloud EPM

Access Adoption Centers

You can access Adoption centers in two ways:

- To access Adoption Centers from the menu, select **Adoption Centers** in the menu, and then select **AI Adoption Center** or **Redwood Adoption Center**.
- To access Adoption Centers from the home page, scroll to the Featured area in the Innovate section, and then select **AI Adoption Center** or **Redwood Adoption Center**.



Redwood Adoption Center

The Redwood Adoption Center is your source for adopting Oracle's innovative Redwood design system. You can access the Redwood Adoption Center from the home page or from the Adoption Centers link on the menu.

Highlights of the Redwood Adoption Center include:

- An introductory video that provides an overview of Redwood.
- Transition to Redwood—This section's four tabs walk you through the process of adopting Redwood from beginning to end. Get product-specific details to help you understand timelines, plan your transition, enable Redwood, and extend it.
- Explore Curated Redwood Adoption Center Features—View a consolidated list of all Redwood features. For HCM, they are sequenced by the suggested order for adopting Redwood; for other products, the order is not sequential. Each tile represents a product and shows when Redwood features will be available if not already. Select a tile to view a features list with only Redwood features for the selected product. You can understand the impact, access learning, share feature content, and add features to your roadmap from the feature list filtered by the tile.
- Resources—The Resources section provides additional information and links to Redwood blogs, training, and documentation.

Oracle Cloud EPM Adoption Center

The Oracle Cloud EPM Adoption Center brings together practical enablement content to help teams improve financial and operational performance management with Oracle Cloud EPM and AI.

Highlights of the Oracle Cloud EPM Adoption Center include:

- Guidance to streamline close.
- Guidance to automate reconciliations and reporting.
- Guidance to connect planning across finance and operations.
- Guidance to establish an EPM Center of Excellence, including change management and RACI best practices.
- Resources to help reduce total cost of ownership, accelerate implementations, and improve audit and compliance readiness.
- AI-driven insights and prebuilt dashboards, reports, and tutorials to support better decisions.

Working with Features in Adoption Centers

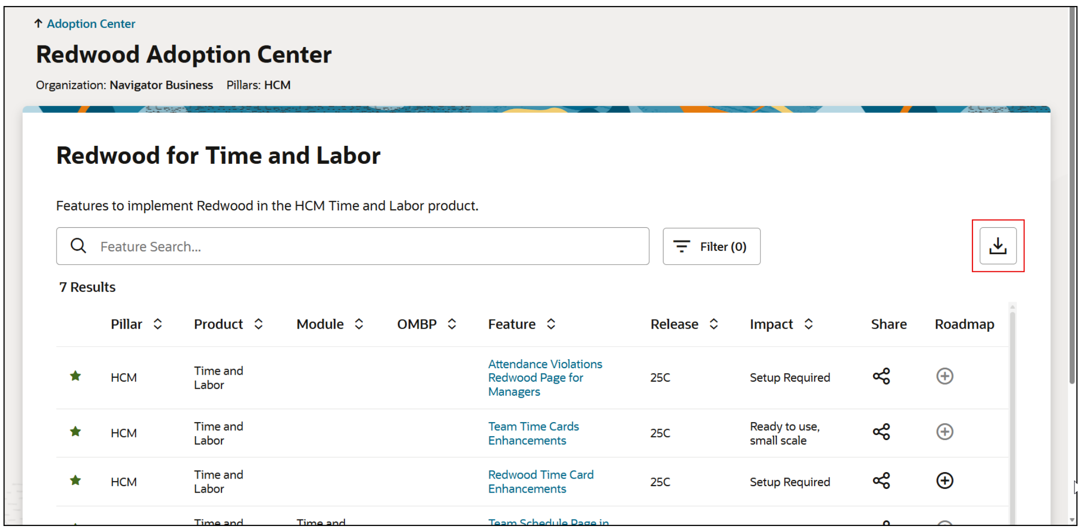
Each Adoption Center includes a curated list of features that, when implemented, will help you adopt the related capabilities. The features are found in the **Explore Curated Adoption Center Features** section.

Each card in that section represents a group of features. After you select the card, you'll find a list of features. You can then add those features to your adoption roadmap (see Assess and Adopt Features and Adoption Roadmaps) or export the list to Excel.

Exporting Features

To export theme features:

1. Go an Adoption Center page.
2. Navigate to the **Explore Curated Adoption Center Features** section.
3. Use the tabs to find features by pillar and product.
4. Select the feature group card that you're interested in.
5. On the feature list page, select the Export button.



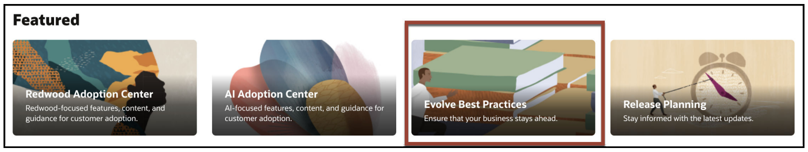
> **Note**
>
> - The exported Excel file includes all currently visible (filtered) features and uses the same columns and order as the Feature Innovation page export.
> - The file name will include the theme feature name and a timestamp.
> - If filters are applied, only features displayed on the page will be included in the export.

Evolve Best Practices

The Evolve Best Practices supports you during the Evolve phase when you are operating and maintaining your Cloud application while continuously growing and innovating. Learn about living in the cloud, operating the system, managing updated support and training, monitoring and driving adoption, managing business outcomes and service intervals, and establishing an innovative mindset.

Accessing Cloud Evolve Best Practices

To access Evolve Best Practices from the home page, scroll to the Featured area in the Innovate section, and then select **Evolve Best Practices**.



Account Profile

Account Profile in Oracle Cloud Success Navigator is a centralized workspace for reviewing an organization across several related views. Use it to understand what the organization has, what is implemented, what is being used, and what business context may affect future planning.

Account Profile brings together **Production Profile**, **Company Overview**, **Subscriptions**, and **Adoption** so you can move between related insights without leaving the page. Review the tabs together to connect availability, implementation status, usage, and business process activity.

Access Account Profile

Open Account Profile from the Home page under Production Profile, or open the left navigation menu and go to Innovate > Account Profile.

What you can do in Account Profile

Use the pillar tabs to focus on a product area such as ERP, HCM, SCM, Sales, Industry, or other available pillars. Use the tabs in Account Profile to review the following:

- **Production Profile**—Review subscribed products and update implementation status. Use Production Profile to understand which products are implemented, implementing, or not in use.
- **Company Overview**—Add important dates and recurring business processes. Use Company Overview to capture business context that can help explain timing and planning decisions.
- **Subscriptions**—Review subscriptions, SKUs, and related product details. Use Subscriptions to understand what products and services are available to the organization.
- **Adoption**—Review feature-based adoption insights for the organization. Use Adoption to identify healthy activity, opportunities for increased usage, decreased activity, and areas that have not yet been measured.

How the tabs work together

Use Account Profile to answer different questions about the organization.

- What products and services are available? Review Subscriptions.
- What products are implemented? Review Production Profile.
- How are features being used? Review Adoption.
- What business context should be considered? Review Company Overview.

Next steps

After reviewing Account Profile, move into the tab that best matches your goal.

Use Production Profile to update implementation status. Use Company Overview to capture important dates and recurring processes. Use Subscriptions to review available products and SKUs. Use Adoption to interpret feature activity and identify next actions.

Production Profile

Use the Production Profile tab in Account Profile to review the products your organization is using and keep implementation status current.

Production Profile shows which products are implemented, implementing, in use, or not in use. Use it to understand what is already active in the organization and to keep the profile aligned with current usage.

Investigate Production Profile Insights

Use Production Profile to review product status and identify next steps.

- Which products are implemented? Review products marked **Implemented**.
- Which products are still in progress? Review products marked **Implementing**.
- Which products are actively used? Review products marked **In Use**.
- Which products are not currently used? Review products marked **Not In Use**.
- Which products need a closer look? Compare Production Profile with **Subscriptions** and **Adoption**.

Access Production Profile

To access the Production Profile tab in Account Profile:

1. Open Account Profile.
2. Select **Production Profile**.

Review Production Profile

To review Production Profile in the Production Profile tab in Account Profile:

1. Select a pillar to review products for a specific product area.
2. Review the product summary for the selected pillar.
3. Review the product groups and product cards on the page.
4. Use **Edit** to change product status, sort products, download data, or add comments.

Change Product Status

To change product status in the Production Profile tab in Account Profile:

1. Select **Edit**.
2. Select **Update Product Status**.
3. Select a status, such as **Implemented**, **Implementing**, or **Not Specified**.
4. Select the check box for each product you want to update.
5. Select **Save**.

Sort Products

To sort products in the Production Profile tab in Account Profile:

1. Select **Sort By Status**.
2. Select the sort option you want to use.

Download Production Profile Data

To download Production Profile data from the Production Profile tab in Account Profile:

1. Select the download icon.
2. Save the file to your computer.

Add Comments

To add comments in the Production Profile tab in Account Profile:

1. Select the comment icon on the product card.
2. Enter your comment.
3. Select **Save Comment**.

Production Profile Information

Use the following information to interpret the page.

- **Pillar**—The Oracle product area associated with the products shown on the page.
- **Implemented**—Products that have been put into production.
- **Implementing**—Products that are in progress.
- **In Use**—Products that are actively being used.
- **Not In Use**—Products that are available but not currently being used.

Account Profile Context

Use Production Profile with the other tabs in Account Profile to build a more complete picture of the organization.

- Subscriptions shows what is available.
- Adoption shows how implemented products are being used.
- Company Overview provides business context that may affect timing and planning.

Next Steps

Use Production Profile to keep implementation status current. Then review **Subscriptions** to confirm what is available and **Adoption** to understand how those products are being used.

Company Overview

Use the Company Overview tab in Account Profile to capture organizational context that can help explain timing, planning, and adoption decisions.

The organization details area appears under the organization header. If any of the organization details need to change, contact Success Navigator Support from the Help menu by selecting **Contact Technical Support**.

> **Note**
>
> The organization details area appears under the organization name header and is not editable. To request a change, open the **Help**  menu and select **Contact Technical Support** under **Support & Feedback**.

Investigate Company Overview Insights

Use Company Overview to understand the business context that may affect planning and adoption.

- What dates matter? Review **Critical Dates**.
- What recurring work matters? Review **Critical Processes**.
- Who supports this account? Review the **Customer Success Manager** list.
- What else may affect timing or planning? Review Company Overview together with **Subscriptions**, **Production Profile**, and **Adoption**.

Access Company Overview

To access the Company Overview tab in Account Profile:

1. Open Account Profile.
2. Select **Company Overview**.

Review Company Overview

To review Company Overview in the Company Overview tab in Account Profile:

- Review the organization details area under the organization header.
- Review **Critical Dates** to see whether any important dates are defined.
- Review **Critical Processes** to see whether any recurring business processes are defined.
- Select the edit icons to update dates or processes when needed.

Organize Company Context

Use Company Overview to capture information that helps provide context for other Account Profile tabs.

- **Critical Dates**: Add single dates or date ranges that matter to your company.
- **Critical Processes**: Add recurring processes that happen on a regular schedule. Select how often a process occurs, such as daily, weekly, monthly, quarterly, or annually.

Add Critical Dates

To add a critical date or date range in the Company Overview tab in Account Profile:

1. In **Critical Dates**, select **Edit**

   .
2. Select **Add date**.

3. Enter a name for the date.
4. Enter an optional description.
5. Select a start date.
6. Select an end date, if needed.
7. Select **Add date**.
8. Select **Save**.

Add Critical Processes

To add a critical process in the Company Overview tab in Account Profile:

1. In **Critical Processes**, select **Edit**

   .
2. Select **Add process**.
3. Enter a name for the process.
4. Enter an optional description.
5. Select a frequency.
6. Select **Add process**.
7. Select **Save**.

Account Profile Context

Use Company Overview with the other tabs in Account Profile to build a more complete picture of the organization.

- **Subscriptions** shows what is available.
- **Production Profile** shows what is implemented.
- **Adoption** shows how implemented products are being used.

Next Steps

Use Company Overview to keep important dates and recurring business processes current. Then review **Subscriptions**, **Production Profile**, and **Adoption** to understand how organizational context may affect availability, implementation, and usage.

Subscriptions

Use the Subscriptions tab in Account Profile to review the Oracle products and services available to your organization.

Subscriptions provides visibility into subscription details, SKUs, quantities, and related products. Use this information to understand what is available, compare availability with implementation status, and identify areas that may need additional review. Subscription information is updated daily from CDP, and you can search by subscription name, keyword, SKU number, or production environment name.

Investigate Subscription Insights

Use subscription information as a starting point for additional investigation.

- What products and services are available? Review subscription details and associated SKUs.
- What products are implemented? Review **Production Profile**.
- How are implemented products being used? **Review Adoption**.

Access Subscriptions

To access the Subscriptions tab in Account Profile:

1. Open Account Profile.
2. Select **Subscriptions**.

Review Subscriptions

To review subscriptions in the Subscriptions tab in Account Profile:

1. Select a pillar to review subscriptions for a specific product area.
2. Use the search field to find a subscription by subscription name, keyword, SKU number, or production environment name.
3. Review the subscription details.
4. Review the associated SKUs and products.
5. Review **Qty/Metric** to understand how the subscription is measured.
6. Export the subscription data if you need to review or share it outside Account Profile.

Subscription Information

Use the following information to interpret the subscription list.

- **Pillar**—The Oracle product area associated with the subscription, such as ERP, HCM, SCM, Sales, or Industry.
- **Service Name (Subscription Name)**—The name of the subscription. Service and subscription are used interchangeably in the Subscriptions tab.
- **Sub ID (Subscription ID)**—The unique identifier associated with a subscription.
- **SKU**—The stock keeping unit associated with a subscription. A SKU can include one or more feature groups and it helps you understand the capabilities provided by the subscription.
- **Environment**—The environment associated with the subscription. Use this value to identify the Oracle Cloud environment linked to the subscription.
- **Qty/Metric (Quantity/Metric)** — The subscribed quantity and the metric used to measure the subscription, such as hosted users, employees, or other contracted units.
- **End Date** — The date when the subscription term ends.

Account Profile Context

Use the other Account Profile tabs together with Subscriptions to build a more complete understanding of your organization.

- **Production Profile** shows which products are implemented.

- **Adoption** shows how implemented products are being used.
- **Company Overview** provides business context that may affect timing and planning.

Next Steps

Use Subscriptions to understand what is available to the organization. Then review Production Profile, Adoption, Company Overview, and Configuration (if available) to connect availability with implementation, usage, and business context.

Adoption

Use the Adoption tab in Account Profile to review whether the organization appears to be using feature groups available in its Oracle services.

Adoption is a feature-based view of usage. It is different from commercial utilization, logins, or page-click activity. Use Adoption to understand where feature use appears healthy, where there may be opportunities to increase use, where activity has decreased, and where adoption has not yet been measured.

Feature groups are sets of related capabilities delivered by a cloud service SKU. A SKU can include one or many feature groups. Each feature group is associated with underlying metrics that indicate whether activity is present for that capability.

The Adoption tab in Account Profile organizes feature groups by maturity category:

- **Core**—Essential features to get started and deliver initial value.
- **Intermediate**—Features that expand capabilities and deliver additional value.
- **Optimized**—Advanced features that maximize value.
- **Optional**—Features for specific business needs. Not every organization needs every optional feature group.

> **Note**
>
> The Adoption tab is visible only to users with these permissions based on Relationship Type in the organization:
>
> - Team Members or Oracle Relationship Type: Account Manager **and** Administrator Access Levels.
> - Partner Relationship Type: Account Manager Access Level.

Investigate Adoption Insights

Use adoption insights to decide what to review next.

- Which feature groups are healthy? Review feature groups marked **Healthy**.
- Which feature groups may have room for increased use? Review feature groups marked **Opportunity**.
- Which feature groups have declined? Review feature groups marked **Decreased**.
- What is driving the adoption level? Select a feature group and review **Metrics**.
- Which subscription or SKU includes the feature group? Select a feature group and review **Parent Details**.

- What should you review next? Compare Adoption with **Subscriptions**, and **Production Profile**.

Understand Adoption Levels

Use the following information to interpret adoption levels.

- **Healthy**—Sufficient activity exists to indicate meaningful adoption of the measured capabilities.
- **Opportunity**—Activity is absent, limited, or insufficient to qualify as healthy. Review these feature groups for potential opportunities to increase use.
- **Decreased**—Indicates a reduction from Healthy activity levels. Review these feature groups to understand what changed and whether follow-up is needed.
- **Not Yet Measured**—An adoption conclusion is not available. Do not interpret this status as a lack of activity.

Access Adoption

To access the Adoption tab in Account Profile:

1. Open **Account Profile**.
2. Select **Adoption**.

Review Adoption

To review adoption in the Adoption tab in Account Profile, filter the view by pillar, adoption level, or subscription, then review the maturity categories, feature groups, and supporting details.

1. Use the filters to narrow the view by **Pillar**, **Adoption Level**, or **Subscription**.
2. Review the feature groups organized by maturity category: **Core**, **Intermediate**, **Optimized**, and **Optional**.
3. Review the high-level adoption information shown for each maturity category.
4. Select a feature group to review the underlying metrics and parent subscription details for that feature group.
5. Review **Metrics** to see the activity measurements associated with the feature group.
6. Review **Parent Details** to see the subscription and SKU that include the feature group.

Account Profile Context

Use Adoption with the other tabs in Account Profile to build a more complete picture of the organization.

- Subscriptions shows what is available.
- Production Profile shows what is implemented.
- Company Overview provides business context that may affect timing and planning.

Next Steps

Use Adoption to identify where usage is healthy and where there may be opportunities to improve. Then review **Subscriptions**, **Production Profile**, and **Company Overview** to understand the broader context behind what you see.

7

Manage Oracle AI Success Navigator

Keep your organization's Success Navigator application up-to-date by maintaining these areas of the application.

- My Team
- Access Level Privileges
- Programs and projects
- Partner Management
- Account Portfolio
- My Documents

My Team

You can view and manage team members on the home and Team Member pages. Only users with the Admin Access Level can add an edit team members.

Team Member Attributes

Each team member has various attributes, including name, email, project and details about the Oracle implementation. While most attributes are self-explanatory, these three attributes can affect how you use and access the application:

- Program Role—The Program Role provides more information about the function of a team member in the organization such as Project Manager, Project Sponsor, or functional leads. It is not required but might be used in future releases to personalize your experience.
- Relationship—The Relationship defines the role a team member plays in the organization. Possible Relationships include:
  - Team Member—A member of the customer team.
  - Partner—A member of the integration partner team.
  - Oracle—A member of the Oracle team.
- Access Level—Your Access Level defines what action you can take in the application. See Access Level Privileges for more information about what users of various Access Levels can do in the application. Success Navigator includes the following Access Levels:
  - Administrator (formerly Admin)—Full access to all features and users.
  - Program Manager (new role)—Manage programs and projects including membership.
  - Release Planning Manager (formerly Production Team Member)—Manage roadmaps and release plans.
  - Program Contributor (formerly Member)—Contribute to program activities including milestones and journey files.
  - Account Manager (new role)—Manage and update the Production Profile.

– Content Viewer (formerly Viewer)—View content and add limited inputs (e.g., add roadmap comments).

Add Team Members

Users with the Admin Access Level can add Team Members.

To add a Team Member:

1. From the Team Members page, select Add Members.
2. Enter the team members first name, last name, and email.
3. In Program Role, select the function of a team member in the organization
4. In Access Level, select the appropriate role for the user.
   See Access Level Privileges for details.
5. In Relationship, select one of these roles that the team member plays in the organization.
   - Team Member: A member of the customer team.
   - Partner: A member of the integration partner team.
   - Oracle: A member of the Oracle team.
6. In Pillar, make one or more selection.
7. In Product Family, make one or more selection.
8. In Product, make one or more selection.
9. Enter optional comments.
10. Select **Save** or **Add Another**.

Update Team Members

Admins can take the following actions with existing Team Members:

- Edit team members.
- Deactivate Team Members. Deactivated Team Members are removed from the organization. They can no longer access the organization they're removed from, but can access any other organizations they are part of.
- Delete Team Member. Deleting a team member removes them from the system entirely.
- Activate Team Members. Return access to the organization to inactivated Team Members.
- Manage adding program and project members.

To update a Team Member

1. Get to the Team Members page:
   - From the menu, select **Members**.
2. On the Team Members page, select ⋯, and then select the action you want to take.

Access Level Privileges

Privileges define what you can access in Success Navigator, along with your program and project memberships. Privileges are managed by Access Levels. Success Navigator includes the following Access Levels, ordered from most privileges to least:

- Administrator—Full access to all features and users.
- Program Manager—Manage programs and projects including membership.
- Release Planning Manager—Manage roadmaps and release plans.
- Program Contributor—Contribute to program activities including milestones and journey files.
- Account Manager—Manage and update the Production Profile.
- Content Viewer—View content and add limited inputs (e.g., add roadmap comments).

All users receive the Content Viewer role. You can be assigned more than one Access Level. If that happens, you will have the privileges of the highest access level.

Roles and Capabilities

Review the actions you can take in Success Navigator by capability and the Access Level needed.

Portfolio Dashboard and Home Page

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View Account Portfolio	Yes	Yes	Yes	Yes	Yes	Yes
Select Fusion or OCI on Account Portfolio	Yes	Yes	Yes	Yes	Yes	Yes
Select account to enter on Account Portfolio	Yes	Yes	Yes	Yes	Yes	Yes
View home page	Yes	Yes	Yes	Yes	Yes	Yes
View recommended activities	Yes	Yes	Yes	Yes	Yes	Yes
Mark recommended activities complete	Yes	Yes	No	Yes	Yes	Yes
Provide feedback	Yes	Yes	Yes	Yes	Yes	Yes
Access OGL guides	Yes	Yes	Yes	Yes	Yes	Yes
View notifications	Yes	Yes	Yes	Yes	Yes	Yes
Access user menu	Yes	Yes	Yes	Yes	Yes	Yes

User Menu and Profile Settings

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View user menu	Yes	Yes	Yes	Yes	Yes	Yes
Switch organization	Yes	Yes	Yes	Yes	Yes	Yes
Switch account	Yes	Yes	Yes	Yes	Yes	Yes
Edit profile	Yes	Yes	Yes	Yes	Yes	Yes
Upload profile photo	Yes	Yes	Yes	Yes	Yes	Yes
Enable or disable personal AI Assist	Yes	Yes	Yes	Yes	Yes	Yes

Application Management

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View team members	Yes	Yes	Yes	Yes	Yes	Yes
Search team members	Yes	Yes	Yes	Yes	Yes	Yes
Filter team members	Yes	Yes	Yes	Yes	Yes	Yes
Add team members	Yes	No	No	No	No	No
Edit team members	Yes	No	No	No	No	No
Deactivate team members	Yes	No	No	No	No	No
Delete team members	Yes	No	No	No	No	No
Use AI Assist	Yes	Yes	Yes	Yes	Yes	Yes
Enable or disable AI Assist (global)	Yes	No	No	No	No	No
Access partner management	Yes	No	No	No	No	No
Add or delete partner	Yes	No	No	No	No	No

Feature Planning (Features and Roadmaps)

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View feature lists	Yes	Yes	Yes	Yes	Yes	Yes
Add features to adoption roadmap	Yes	No	No	Yes	No	No
Search feature lists	Yes	Yes	Yes	Yes	Yes	Yes
Filter feature lists	Yes	Yes	Yes	Yes	Yes	Yes
Download feature lists	Yes	Yes	Yes	Yes	Yes	Yes
Share features	Yes	Yes	Yes	Yes	Yes	Yes
View adoption roadmaps	Yes	Yes	Yes	Yes	Yes	Yes
Search adoption roadmaps	Yes	Yes	Yes	Yes	Yes	Yes
Change adoption roadmap views	Yes	Yes	Yes	Yes	Yes	Yes
View features on adoption roadmaps	Yes	Yes	Yes	Yes	Yes	Yes
Delete features on adoption roadmaps	Yes	No	No	Yes	No	No
Comment on features on adoption roadmaps	Yes	Yes	Yes	Yes	Yes	Yes
Update feature status on adoption roadmaps	Yes	No	No	Yes	No	No
Update due date on adoption roadmaps	Yes	No	No	Yes	No	No
Change assignee on adoption roadmaps	Yes	No	No	Yes	No	No
Create or add tags on adoption roadmaps	Yes	No	No	Yes	No	No

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
Move features (Kanban view of adoption roadmaps)	Yes	No	No	Yes	No	No
Rename Kanban columns of adoption roadmaps	Yes	No	No	Yes	No	No
Export adoption roadmaps	Yes	Yes	Yes	Yes	Yes	Yes

OMBP (Key Features and Learn Business Processes)

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View videos	Yes	Yes	Yes	Yes	Yes	Yes
Filter by country and pillar	Yes	Yes	Yes	Yes	Yes	Yes
View business processes	Yes	Yes	Yes	Yes	Yes	Yes
Download attachments	Yes	Yes	Yes	Yes	Yes	Yes
Access training	Yes	Yes	Yes	Yes	Yes	Yes

Programs

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View programs	Yes	Yes	Yes	Yes	Yes	Yes
Create program	Yes	No	No	No	Yes	No
Edit programs	Yes	No	No	No	Yes	No
View program details	Yes	Yes	Yes	Yes	Yes	Yes
Manage team members	Yes	No	No	No	Yes	No
Manage projects	Yes	No	No	No	Yes	No

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
Manage milestones	Yes	No	No	No	Yes	No

Account Profile

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View Production Profile	Yes	Yes	Yes	Yes	Yes	Yes
Edit Production Profile	Yes	No	No	No	No	Yes
View Production Profile comments	Yes	Yes	Yes	Yes	Yes	Yes
Submit Production Profile comments	Yes	No	No	Yes	No	Yes
View Company Overview	Yes	Yes	Yes	Yes	Yes	Yes
Edit Company Overview	Yes	Yes	No	No	Yes	Yes
View Subscriptions	Yes	Yes	Yes	Yes	Yes	Yes
View Adoption	Yes based on these Relationship Types: • Team Member: Yes • Oracle: Yes • Partner: No	No	No	Yes	No	Yes

My Documents

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
View documents	Yes	Yes	Yes	Yes	Yes	Yes
Search documents	Yes	Yes	Yes	Yes	Yes	Yes

Capability	Administrator	Program Contributor	Content Viewer	Release Planning Manager	Program Manager	Account Manager
Upload file	Yes	Yes	No	Yes	Yes	Yes
Download file	Yes	Yes	Yes	Yes	Yes	Yes
Edit file	Yes	Yes	No	Yes	Yes	Yes
Attach file to program	Yes	Yes	No	Yes	Yes	Yes
Delete file	Yes	Limited	No	Yes	Yes	Yes
View file properties	Yes	Yes	Yes	Yes	Yes	Yes

Manage Implementations with Programs, Projects, and Milestones

Suucess Navigator gives you tools to guide and track your Oracle Cloud implementation—such as Starter Configuration, Cloud Quality Standards, and the Journey. These tools help you understand *what* to do. To manage *how* the work gets done, you'll use programs, projects, and milestones.

This guide walks you through how to set up programs and projects to plan, execute, and report on your implementation effectively.

Step 1: Decide How to Organize Your Implementation

Start by choosing whether to use a single program or a program with multiple projects.

- Use one program if your implementation is small, with a limited scope.
- Use multiple projects under a program if your implementation involves different products, regions, or workstreams.

Example: If you're implementing HCM and ERP across two regions, create one program and add four projects—one for each product/region combination.

Step 2: Assign Program and Project Members

Next, identify who on your team should manage the program and each project. Users need to be added as Members of the programs or projects to make changes or to complete assessments.

- Program Members can:
  - Edit the program.
  - Update program-level milestones.
  - Complete program-level assessments.
  - Automatically become Project Members of projects related to the program, but can be removed if needed.
- Project Members can:
  - Edit their specific project.
  - Update project-level milestones.
  - Complete project-level assessments.

You can manage Program Members and Project Members access from the Program and Projects section or the Team Member area where you manage users in your organization.

> **Note**
>
> Think carefully about who should have access to which programs or projects, especially in large implementations.

Step 3: Create Your Program

Now you're ready to create your program in Success Navigator to serve as the high-level structure for your implementation.

For detailed steps, refer to the Programs and Projects topic. Pay close attention to team access when configuring your programs and projects.

Step 4 (Optional): Create Projects Under the Program

After you finish creating your program, you can add one more projects under the program to track specific phases of your implementation. Projects let you manage milestones and assessments for separate workstreams while still rolling up into the overall program.

To create a new project, select **New Project** and follow the steps in the Programs and Projects topic.

Projects let you manage milestones and assessments for separate workstreams while still rolling up into the overall Program.

Step 5: Define Milestone Dates at the Program Level

After configuring your program, the Program and Project Milestones section looks like this, with the program at the top and projects underneath it:

Start by selecting **Add Milestone** to set milestone dates at the program level. Starting with the program sets you up to more easily define the dates for the projects:

- These dates can be shared with associated projects.
- If a shared milestone date changes at the program level, it automatically updates in the projects.

Find detailed steps for adding milestones in the Programs and Projects topic.

> **Note**
>
> Don't know exact dates yet? Add estimates anyway—you can refine them later.

Step 6: Add Milestone Dates to Each Project

Once program-level dates are in place, assign milestone dates to your projects.

When adding milestone dates to projects, use "Share Program Milestone" if the same date applies from the program-level milestone (e.g., a shared Go Live). This keeps your schedule aligned and reduces manual updates later.

Step 7: Adjust Assessment Timeframes

Each milestone includes assessment questions with suggested timeframes (e.g., "T-4 weeks" means 4 weeks before the milestone date).

To customize these timeframes select the button on the milestone card and selecting **Edit Timeframe**. See the Programs and Projects topic in the user guide.

Step 8 (Ongoing): Complete Assessments to Track Progress

Once everything is set up, begin completing milestone assessments to measure your implementation progress. Note the following details about milestones and assessments:

- Assessments are specific to each program and project.
- Only Admins and Members can complete assessments.
- The user must be assigned to the program or project to access its assessments.

Use assessments regularly to stay on track, surface risks, and make informed decisions.

Final Tips

- Set up programs and projects early. They help align your team and establish a shared schedule.
- Keep milestone dates updated and realistic. They drive many of the automated insights in Success Navigator.
- Revisit assessments throughout the implementation to monitor your progress and readiness.

Programs and Projects

Success Navigator helps you organize simple and complex implementations into programs and projects. Programs define the milestones for any implementation, but if you're running a phased deployment (e.g., wave deployment, stream deployment, or rolling deployment) with independent milestones for different pillars, products, or geographies, you can create projects under the program.

If you're running an implementation for simple project, you can set all of the milestones at the program level. But if you're running a large implementation for a phased deployment, set overall milestone dates for the program and specific milestones for each stream in projects under the program.

Project milestones can inherit dates from the program or use independent milestone dates. You can also share milestone dates from other projects.

Program and Project Members

Program Members and Project Members allow you to control access to specific programs and projects, even for users with Admin Access Level. Users in your organization with Admin and Member Access Levels can update milestone assessments only for programs and projects where they are Program Members or Project Members. Admins can only update programs and projects where they are Program Members or Project Members. Program Members are automatically added as Project Members for child projects, but they can be removed.

Create a Program

Users with Admin access can create programs that define the milestone dates for the overall implementation.

To create a program:

1. Start from the home or Programs page.
   - From the Programs section on the home page, select Ellipsis button …, and then select **Add New Program**.
   - On the Programs page, select **New Program**.
2. On the Create New Program page, enter the program's details:
   - Name—Enter the name of the program.
   - Status—Keep **Active** selected.
   - Implementation Partner—Optionally select the implementation partner that you're working with. The drop-down list displays only the partners configured in Partner Management. For more information on managing the partner list, see Partner Management.

     > **Note**
     >
     > All users see the Foundational Journey, but some partners have additional journeys.

   - Description—Enter a brief description of the program.
   - Region—Select one or more regions where the program will be implemented.
   - Industry—Select one more industries to associate with the program.
   - Pillar—Select one or more pillars.
   - Product Family—Select one or more product families from your pillar.
   - Product—Select one or more product.
   - Notes—Enter optional notes about the program.
3. Select **Submit.**
4. Select **Save and Continue** to move to the **Members** page.
5. Select all of the users who should be able to access to the program.

   > **Note**
   >
   > Program members become members of projects under the program.

6. Select **Save and Continue**.
7. The next step is to optionally add projects. Click **Add Project**, enter the **Project Information** details, select **Project Members**, and then click **Save Project**. See **Create Project** for details. When finished, select **Save and Continue**.

8. To configure milestones for your projects, see the **Manage Program and Project Milestones** section for more information on setting up milestones.

Create Projects

To add a project:

1. Select **Add New Project**.
2. Enter the project's details:
   - Name—Enter the name of the project.
   - Status—Keep **Active** selected.
   - Implementation Partner—Optionally select the implementation partner that you're working with. The drop-down list displays only the partners configured in Partner Management. For more information on managing the partner list, see Partner Management.

   > **Note**
   >
   > Selecting an implementation partner at the project level does not affect which journey users can see.

   - Description—Enter a brief description of the project.
   - Notes—Enter optional notes about the project.
   - Pillar—Select one or more pillars configured for the program.
   - Product Family—Select one or more product families from your pillar.
   - Product—Select one or more product.
3. Expand **Project Members**, and then select all of the users who should be part of the project.

   > **Note**
   >
   > Projects inherit their membership from the program, and those users are shown in Program Members.. You can add project members, but cannot remove users associated with the program.

4. Select **Save Project**.
5. Continue to set the project's milestone dates.

Manage Program and Project Milestone

Milestones provide gates in the implementation process to help you gauge your progress in each stage. The milestones are composed of assessment questions that identify criteria that should be met.

Each program and project has their own milestones. To complete the assessments needed to keep you on track, configure the milestones for each program and project.

For each milestone, you can define the target dates for when they should be completed. You can also manage “T-“ timeframes that are based on the milestone date. The “T-“ timeframes indicate when the tracked criteria should be met based on the milestone date. So, activities related to an assessment question with a timeframe of T-4 weeks should be completed 4 weeks before the milestone date.

To set program or project milestone dates:

1. Select **Milestones** tab from the left menu.
2. Select **Add Milestone** under the stage you want to configure.
3. For program milestones, enter a milestone date.
   For project milestones, Select the milestone date option.
   - Share Program Milestone—Select to share the date from the same milestone in the linked program.
   - Share Project Milestone—Select to share the date from the same milestone in a project that's already part of the program.
   - Add New Milestone—Select to add an independent milestone date, and then select the date for the milestone.
4. Select **Update**.
5. When finished, select **Update**.

To edit timeframes of existing milestones:

1. On the Program and Project Milestones page, select **Edit**.
2. Select the Ellipsis ( ) button on the milestone card, and then select **Edit Timeframes**.
3. Select your custom timeframe for each assessment question.
4. Select **Submit**.

Edit Program and Project Properties

Users with Admin or Program Manager access can edit programs if they are also Program Members. Possible updates you might make include updating program members, changing a project's status, or changing pillars and products.

To edit a program:

1. Start from the home or Programs page.
   - From the Programs section on the home page, select .
   - One the Programs page, select .
2. On the Program Information page, make your changes to the program properties, change the program status, updated Program Members, or update milestones.
   - Add Program Members—Expand Program Members, and then select team members.
   - Remove Program Members—Expand Program Members, and then select next to any team members to remove from the program.
   - Update a programs' status—Select a new status from the status list.
   - Edit the program's properties—You can edit any program property, including name, pillar, description, and notes.
3. When finished, select **Update**.

To edit a project:

1. On the **Projects** tab, select ✎ next to the project you want to edit.
2. Make your changes to the project details.
3. When finished, select **Save Project**.

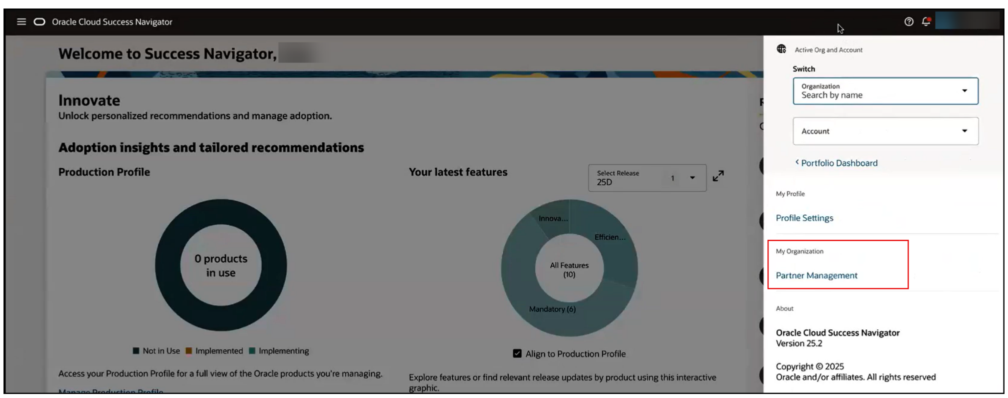
Partner Management

Partner Management allows you to add and manage implementation partners, making only your selected partners available when creating programs and projects.

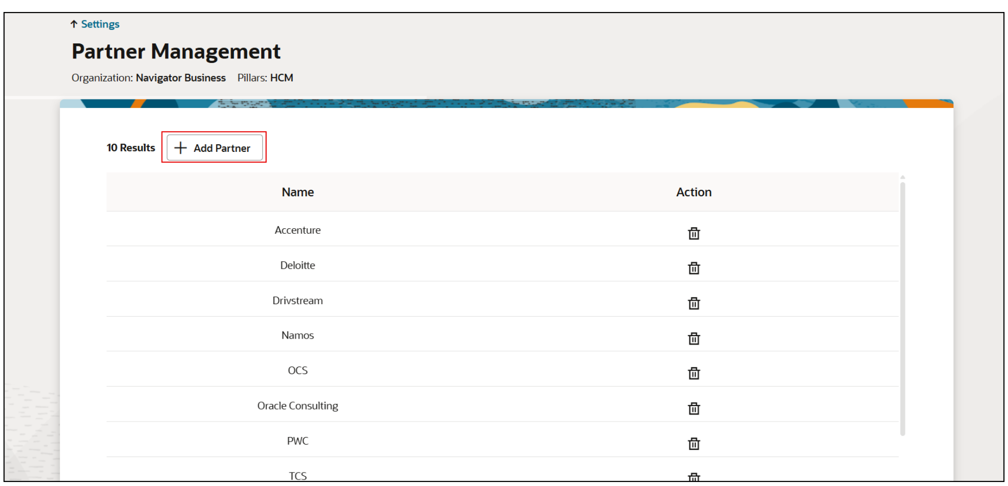
> ⓘ **Note**
>
> You can also set up the partner when creating or editing a program.

To add the partner to the list:

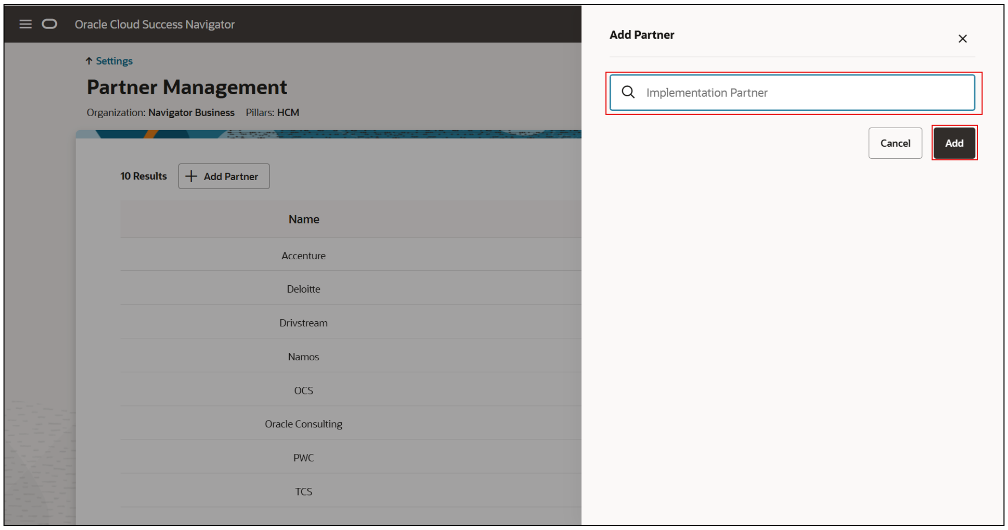
1. Select your profile on the home page.
2. Select **Partner Management** under My Organization.



3. Select **Add Partner**.



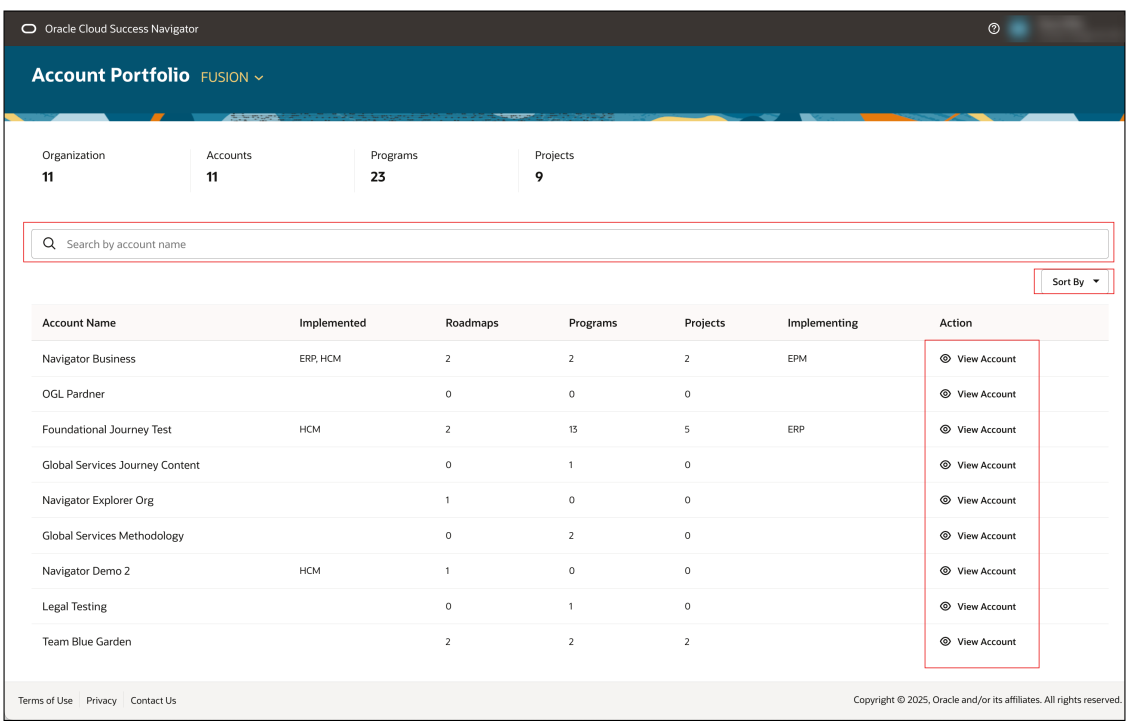
4. Search for the required partner and select **Add**. The selected partner will then be added to the list.



Account Portfolio

The Account Portfolio page allows users to manage multiple organizations and their associated accounts from a single location. The Account Portfolio Dashboard provides a summary of users organizations, accounts, programs, projects, and roadmaps—making it simple to view and access all relevant information in one place.

The Account Portfolio displays the summarized data across organizations, including the total number of organizations, accounts, programs, and projects you are part of.



You can take the following actions on the Account Portfolio page:

- Use the search to find specific customers.
- Use Sort By to sort the accounts list by Account Name, Roadmaps, Programs, and Projects.
- Click **View Account** to access an account's home page.

Access the Account Portfolio

The Account Portfolio appears whenever users with more than one account log in. You can return to Account Portfolio and switch between selected accounts anywhere in the application.

- To return to the Account Portfolio, select **Portfolio Dashboard** in the upper-right.
- To switch accounts, select an account from the list next to Portfolio Dashboard in the upper-right.

My Documents

Use My Documents to upload and share content—including files and hyperlinks—related to your organization's implementation and innovation activities. Content is available in the Document Library to users in the organization based on the relationship type associated with the file (i.e., Team Member, Partner, or Oracle).

You can upload any of these types of files with a maximum file size of 20MB:

- PDF (.pdf)
- Word (.doc, .docx)
- Excel (.xls, .xlsx)
- PowerPoint (.ppt, .pptx)
- Text (.txt) ZIP (.zip)

Audio files:

- MP3 (.mp3)
- WAV (.wav)
- OGG (.ogg)

Video files:

- MP4 (.mp4)
- WEBM (.webm)
- OGV (.ogv)

Image files:

- PNG (.png)
- JPG/JPEG (.jpg, .jpeg)
- GIF (.gif)

- WEBP (.webp)

Upload Files or Add Links

Users with Admin or Member Access Levels can upload files or share hyperlinks.

To upload content or add hyperlinks:

1. Access **My Documents** from the home page or menu.
   - On the home page, scroll to the Featured area in the Implement section, and then select **Document Library**.
   - On the menu, select **My Documents**.
2. Select **Upload**.
3. Enter the name of the file or hyperlink.
4. Select one or more Relationship Types.
   This selection determines which users can access the files based on Relationship Type.
5. Upload the file or enter the URL in the **Link** box.
6. Optionally enter comments.
   Comments are searchable and you can use them to describe the content or make it easier to find.
7. Optionally add additional metadata.
   - Program—Select the program to associate with the content.
   - Projects—If the selected program has projects, select one or more projects.
   - Journey—If the program has more than one journey, you can select one or more journeys.
   - Stage—Select the stage of the journey.
   - Activity—Select the menu item in the journey to associate with the content.
   - Asset—Select the section of the page or tile in the journey to associate with the content.
   - Pillar—Select a pillar to associate with the content.
8. Select **Submit**.

Update Documents

You can update content in My Documents, including replacing the uploaded file or URL, adding comments, or updating the content's metadata. Team Members can only update content they added, while Admins can update any document.

To update content:

1. Access **My Documents** from the home page or menu.
   - On the home page, scroll to the Featured area in the Implement section, and then select **Document Library**.
   - On the menu, select **My Documents**.
2. Select ... under **Actions**, and then select **Edit**.
3. Select **Submit** when finished.

Download Files

Users with any Access Level can download files.

To download files:

1. Access **My Documents** from the home page or menu.
   - On the home page, scroll to the Featured area in the Implement section, and then select **Document Library**.
   - On the menu, select **My Documents**.
2. Select  under **Properties**.
3. In the Properties window, select .

Search My Documents

You can search for content in My Documents by file name and comments.

8
Release Notes

Learn about the latest features, changes, and improvements in Oracle Cloud Success Navigator. You can also compare release versions to get a complete list of all changes.

2026 Release Notes

This section provides the 2026 release notes for Cloud Success Navigator, highlighting the latest features and enhancements for Fusion, AI Assist, and Starter Configuration.

Success Navigator Fusion

This section contains the release notes for the fusion features and enhancements in Success Navigator.

Release Version 26.1

The June 15, 2026 update to release version 26.1 includes the following updates:

- Innovate New Feature: **Account Profile**
  Use Account Profile to review subscriptions, product status, adoption insights, and business context in one place. Account Profile includes these work areas:
  - **Production Profile**: Review and update product implementation status. Production Profile has moved into Account Profile.
  - **Company Overview**: Add important dates and recurring business processes for planning context.
  - **Subscriptions**: Review subscribed service names, SKUs, quantities, and associated production environments.
  - **Adoption**: Review feature group adoption insights by maturity category.
- OMBP Enhancement: **OMBP and Key Features Additional Details**
  View additional OMBP and Key Features details such as business outcomes and required setup, along with supporting documentation and video resources to discover innovation opportunities.

Some features in this release were inspired by customer ideas submitted through the [Success Navigator Idea Lab](#).

- Foundation Enhancements:
  - **AI Assist everywhere**
    AI Assist is embedded on the home page and is available on every page in Success Navigator.
  - **Updated Roles and Permissions**
    Use enhanced roles and granular permissions to manage access in Success Navigator. Updated roles provide clearer responsibilities and more precise control over features and data. See role details in [Access Level Privileges](#) in the User Guide.
    * Administrator (formerly Admin)—Full access to all features and users.

    * Program Manager (new role)—Manage programs and projects including membership.
    * Release Planning Manager (formerly Production Team Member)—Manage roadmaps and release plans.
    * Program Contributor (formerly Member)—Contribute to program activities including milestones and journey files.
    * Account Manager (new role)—Manage and update the Production Profile.
    * Content Viewer (formerly Viewer)—View content and add limited inputs (e.g., add roadmap comments).
  - **New experience for Oracle Global Industry Unit (GIU) customers**
    In a controlled release, a limited set of customers can access a dedicated Global Industry Unit (GIU) home page experience with relevant Success Navigator features, including journeys, Evolve Best Practices, Cloud Implementation Milestones, Document Library, Oracle Playbooks, and Programs and Projects.
  - **Document Library (My Documents)**
    The Document Library now supports uploading Powerpoint and video files up to 20MB, including PPT, PPTX, MP4, WEM, and OGV. Related Idea Lab submissions:
    * Idea Number: 880470 Ability to add video files (mp4, mov, etc)
    * Idea Number: 948079 Please Increase Document Library Capacity and Increase Document Size Limit
    * Idea Number: 880473 Ability to add PPT
- Implement Enhancements:
  - **Read-only Starter Configuration**
    Explore a read-only Starter Configuration. The read-only experience provides view-only access to business processes with step-by-step guidance, using predefined personas and a centrally managed environment.
  - **Oracle Modern Best Practice and Key Features**
    Explore key features in Oracle Fusion Cloud Applications aligned to business processes, based on Oracle Modern Best Practice (OMBP)—an end-to-end model and library of prescriptive best practices.
  - **Learn about Business Processes**
    Explore business processes, role-based personas, leading practices, and embedded KPIs and reports in Starter Configuration. Use narratives, videos, and step-by-step guides to understand each use case, with content organized by Oracle Modern Best Practice (OMBP) as the underlying framework
  - **Getting Started with Oracle**
    Use redesigned onboarding, activation, and provisioning content to accelerate familiarity with Oracle Fusion Cloud Applications, including role-based onboarding.
  - **Oracle Cloud EPM Adoption Center: Adoption Centers**
    The Adoption Center provides guidance and resources to:
    * Streamline close processes
    * Automate reconciliations and reporting
    * Connect planning across finance and operations
    * Accelerate adoption with AI-driven insights and prebuilt dashboards.
- Innovation Enhancements:
  - **Update Planning Center**

Update Planning Center brings together Release Readiness, Adoption Roadmaps, and Release Guidance in one place. It helps you review mandatory and opt-in expired features, manage optional feature adoption, and prepare for recurring updates across Oracle applications.

Related Idea Lab submissions:

* Idea Number: 874726 Ability to see what features have opt-in expiration coming up
* Idea Number: 922205 Items that are Deferred/Not Applicable need removed from Roadmap

- **Adoption Roadmap**
  Create custom items, clone features, organize features into a Not Applicable column, manage comments and tags from a single editing drawer, and back date due dates.

  Related Idea Lab submissions:

  * Idea Number: 949505 Ability to create Custom feature to add to Fusion Roadmap
  * Idea Number: 892479 Non-Oracle driven Roadmap items
  * Idea Number: 920286 Ability to click on/hover over the Comments button and pull up comments section

- **Feature Innovation**
  Multi-select features to add to the adoption roadmaps.

- Premium Services: **Oracle Cloud Application Testing Service**
  Oracle Cloud Application Testing Service is an AI-powered, self-service regression testing service in Oracle Cloud Success Navigator. It enables Oracle Fusion customers to validate business-critical workflows across updates by running automated test jobs, managing test data (databanks) and environments, and monitoring executions from a single, role-based experience. Review step-level results, take action, and export reports to support release readiness and go/no-go decisions.
- Documentation Enhancement: **Release Notes**
  Success Navigator Release Notes now include related submissions from the Idea Lab.

  Related Idea Lab submissions:

  - Idea Number: 957534 In Release Notes, Include if the Enhancement stemmed from an Idea

Success Navigator AI Assist

This section provides the release notes for AI Assist in Cloud Success Navigator.

Success Navigator AI Assist May 2026 Release

- Web Search Support in AI Assist
  AI Assist can now retrieve information from approved, public Oracle web sources, including Oracle documentation, blogs, and community content. This enhancement helps users access more current and relevant guidance directly within AI Assist.
- AI Assist Support Content Integration
  AI Assist can now retrieve answers from the Success Navigator FAQs and User Guide to provide more accurate and contextual guidance within Success Navigator. Responses include links to supporting Oracle documentation and help users quickly access relevant product information.
- Dynamic Roadmap Column References

AI Assist now recognizes custom roadmap column names in Adoption Roadmaps. Responses and actions automatically reflect renamed columns, improving consistency across roadmap workflows.

- Improved Feature Context with Module and Oracle Modern Best Practice Information
  AI Assist now uses additional feature metadata, including aligned Oracle modules and Oracle Modern Best Practice business processes, to provide more relevant and contextual responses when exploring Oracle Fusion Applications features.

Success Navigator AI Assist February 2026 Release

This release includes general fixes and updates to improve overall performance and reliability.

Related Topic Link: AI Assist in Success Navigator

Success Navigator Starter Configurations

This section contains the release notes for Starter Configuration updates, enhancements and related changes in Cloud Success Navigator.

Starter Configuration May 2026 Release

The May 2026 release of Starter Configuration delivers enhanced use cases for the Report to Forecast and Plan to Approval business processes supported by Oracle Fusion Cloud Enterprise Performance Management (EPM) applications.

- For Report to Forecast, the release includes key features to prepare project financial forecasts for capital, indirect, and contract projects. The release also includes the creation of project financial statements and consolidated financial statements.
- For Plan to Approval, the release includes strategic goal setting for Profit & Loss and Balance Sheet accounts. It also includes simulation and goal-seek capabilities to evaluate different scenarios. Other key enhancements include preparing project financial plans, loading actual project costs into project financial plans, and performing variance analysis.

Starter Configuration April 2026 Release

The April 2026 release of Starter Configuration delivers enhanced use cases for the Period Close to Financial Reports business process, supported by Oracle Fusion Cloud Enterprise Performance Management applications.

For Financial Consolidation and Close, the release includes a preloaded data set and entity structure that support multiple consolidation methods, intercompany eliminations, calculations, and reporting with generative AI. For Account Reconciliation, it introduces enhanced use cases for automated transaction matching, consolidation, and reporting.

Starter Configuration for Oracle Fusion Cloud Applications is updated to release 26B. Customers can request deployment of Starter Configuration for ERP, HCM, SCM, and CX in a test environment running Oracle Fusion Cloud Applications release 26B.

Related Topic Link: Starter Configuration

Starter Configuration March 2026 Release

The March 2026 release of Starter Configuration introduces new features for Oracle Fusion Cloud Applications, with a focus on AI and Redwood UX across Human Capital Management and Supply Chain Management.

The release is ready for deployment in customer test environments for Oracle Fusion Cloud Applications release 26A.

Related Topic Link: Starter Configuration

Starter Configuration February 2026 Release

The February 2026 Starter Configuration release delivers selected new features in Oracle Fusion Cloud Applications, with a focus on Artificial Intelligence and the Redwood user experience across Human Capital Management, Enterprise Resource Planning, Customer Experience, and Supply Chain Management.

This release is ready for deployment to customer test environments running Oracle Fusion Cloud Applications Release 26A.

Related Topic Link: Starter Configuration

Starter Configuration January 2026 Release

The January 2026 release of Starter Configuration introduces another new product to the solution footprint. In addition to Starter Configurations for Fusion Cloud Applications, Enterprise Performance Management, Configure-Price-Quote, and Oracle Transportation Management (OTM), we are now introducing a Starter Configuration for Oracle Warehouse Management (WMS).

Starter Configuration for WMS includes these Oracle Modern Best Practice (OMBP) business processes:

- Receiving (cross-dock) to Shipping (WMS)
- Receiving to Directed Putaway (WMS)
- Material Request to Delivery (WMS)

Related Topic Link: Starter Configuration

2025 Release Notes

This section provides the 2025 release notes for Cloud Success Navigator, highlighting the latest features and enhancements for Fusion, AI Assist, and Starter Configuration.

Release Version 25.2.2

- Foundation Enhancement: **Edit User Profile**
  All users can now update their own profile details. To update your profile, go to the User menu and select Profile Settings.

  Related Topic Link: Get Started on the Home Page
- Adoption Roadmaps Enhancements:
  - **Tag users in comments**
    Now when commenting on a feature you can type the "@" symbol followed immediately by their name. Success Navigator then shows a list of suggested users for you to select. Tagged users receive a notification in the bell icon in the header.
  - **Edit saved or completed features**
    You can now perform the same feature card edit actions, including commenting, editing, and assigning on features in the Saved and Completed columns.
  - **Add past due dates**

Success Navigator now allows you to add or update due dates that happened in the past.

Related Topic Link: Adoption Roadmaps

- Home Page Enhancement: **Upcoming Events**
  Now you can view Success Navigator events in the Upcoming Events.

  Related Topic Link: Get Started on the Home Page

Starter Configuration for December Release

In addition to Starter Configurations for Fusion Cloud Applications, Enterprise Performance Management, and Configure-Price-Quote, we are now introducing Starter Configuration for Oracle Transportation Management (OTM).

Starter Configuration for OTM includes the Outbound Shipment to Delivery (OTM) Oracle Modern Best Practice business process.

Related Topic Link: Starter Configuration

Starter Configuration for November Release

- Starter Configuration Enhancement: **Starter Configuration**
  - Deployment Platform: Oracle Fusion Cloud Applications, Release 25D
  - **AI Agents**
    - Enabled AI Agents for: HCM, ERP, SCM
  - **Feature Enablement**
    - Optional features enabled for: HCM, ERP, SCM
  - **OMBP Enablement**
    - Customer Experience (CX) Pillar enabled for the following countries: Canada, Mexico, Germany, South Africa, UAE, Singapore, India, Australia, Brazil, Argentina
  - **Supply Chain Management (SCM) Pillar**
    - OMBP with Risk Management focus enabled globally

  Related Topic Link: Starter Configuration

Release Version 25.2.1

- Foundation New Feature: Oracle Cloud Success Navigator for OCI (currently available only to Limited Availability customers)
  Introducing Oracle Cloud Success Navigator for OCI: a unified digital platform that streamlines cloud adoption with guided workload journeys, integrated best-practice tools, and collaborative resources for your OCI projects. Success Navigator for OCI includes these key features:
  - **Workloads**
    Organize your cloud projects around specific business goals—such as Database Migration, Gen AI Implementation, or Multicloud deployment for AWS, Azure, or Google. Each workload is a secure, collaborative space where you set up your project, invite team members, and track all related activities in one place.
  - **Journeys**
    Follow structured, step-by-step guidance tailored to your workload. Each journey is organized into Discover, Design, and Implement stages, making it easy to see what

needs to happen next, assign responsibilities, and ensure alignment with Oracle best practices.

  - **Well-Architected Tool (WAT)**
    Confidently assess your planned cloud architecture against Oracle's proven best practices. The Well-Architected Tool helps you identify risks and optimization opportunities in security, reliability, performance, and cost with actionable recommendations to strengthen your solution before you build.
  - **Cloud Migration Advisor (CMA)**
    Simplify and accelerate complex migrations with intelligent, data-driven recommendations. CMA analyzes your environment and provides tailored migration strategies and best-fit cloud targets, helping you plan and execute seamless transitions to Oracle Cloud.
  - **Learning Center**
    Develop your team's cloud expertise with in-context learning resources, curated videos, and hands-on guides embedded throughout the platform. This helps you stay current, onboard new team members faster, and drive successful adoption.
  - **Reference Architecture**
    Access proven, workload-specific reference architectures based on Oracle's standards. Use these blueprints to streamline the design process, avoid common pitfalls, and accelerate solution delivery—with ready access to templates and design patterns that can be customized for your needs.
- Adoption Roadmap: Notifications When you're assigned a roadmap feature, you'll receive a notification in the notifications area (bell icon on the top right). You can select the notification to go directly to the Adoption Roadmap.
- Known Issue: Journeys and My Documents
  Due to recent changes that support ongoing enhancements to journeys, files previously associated with a journey in My Documents, or uploaded directly to a journey, may no longer be linked. If this affects you, delete the original file and upload it again to maintain the association.

Release Version 25.2

- Foundation New Feature: **AI Assist**
  AI Assist brings the collective knowledge and intelligence of Oracle directly to your team through the power of generative AI. AI Assist is designed to help you make faster, smarter decisions with confidence.

  Four new AI Assist agents are now available to further empower your teams to:
  - Utilize Oracle Modern Best Practice: Receive personalized recommendations, guides, and resources, making it easier to optimize workflows and quickly adopt proven best practices.
  - Track key milestones: Benefit from timely insights on key project milestones. AI Assist highlights quality benchmarks, process improvements, and potential risks to support better planning and improve implementation outcomes.
  - Plan for and adopting new features: Discover relevant new features that fit your production profile and business objectives. AI Assist streamlines the discovery process and suggests where to focus next for quicker adoption and greater value.
  - Build adoption roadmaps: Benefit from tailored, AI-driven recommendations for prioritizing and planning feature adoption. The roadmap updates dynamically in real time, so your product plans always reflect your evolving business needs.

  Related Topic Link: AI Assist in Success Navigator

- Foundation Enhancement: **Account Management**
  The Account Portfolio was update to make it easier for users who belong to more than one organization to manage their access.

  Related Topic Link: Account Portfolio
- Roadmaps Enhancement: **Adoption Roadmaps**

  Take your roadmap management to the next level with these updates:
  - Assign due dates and users to features, and view audit details
  - Filter by module, Oracle Modern Best Practice, assigned user, and tags
  - Tag individual features to organize into relevant groups
  - View the count of features within each column
  - View features in column or list format
  - View Tags, Module, and OMBP in the export file

  Related Topic Link: Adoption Roadmaps
- Feature List Enhancement: **Feature Innovation**
  Refine your search in Feature Innovation by module or Oracle Modern Best Practice.

  Related Topic Link: Assess and Adopt Features
- Home Page Enhancement: **Home page Feature Filter**
  Filter features by release, including CTX features, in the sunburst visualization

  Related Topic Link: Get Started on the Home Page
- Programs and Projects Enhancement: **Programs and Projects**
  More easily manage programs and projects with a redesigned interface that improves visibility across your initiatives.

  Related Topic Link: Programs and Projects
- Starter Configuration Enhancement: **Starter Configuration**
  - You can now delete unsubmitted Starter Configuration requests and keep your Starter Configuration list up-to-date.
  - Starter Configuration now supports EPM Tax Reporting Cloud Service.

  Related Topic Link: Starter Configuration
- Home Page Enhancement: **Upcoming Events**
  Now you can view CX and OCI product events in the Upcoming Events.

  Related Topic Link: Get Started on the Home Page

Starter Configuration for September Release

- Starter Configuration Enhancement: **Starter Configuration**
  EPM

  New OMBPs are introduced for Tax Reporting for Global:
  - Period Close to Tax Provision
  - Tax Provision to Statutory Filing

  HCM, SCM, ERP

  Evaluate and explore newly enabled key features from 25C related to Redwood, AI Agents, and Gen AI.

Related Topic Link: Starter Configuration

Starter Configuration for August Release

- Starter Configuration Enhancement: **ERP**
  - All previously released OMBPs for Financials, and Projects are now also supported for Canada, Mexico, Germany, South Africa, United Arab Emirates, Singapore, India, Australia, Brazil, and Argentina.
  - The Internal Controls Automation to Certification OMBP is released under Risk Management.

  Related Topic Link: Request Starter Configuration
- Starter Configuration Enhancement: **SCM**
  - All previously released OMBPs for SCM are now also supported for Canada, Mexico, Germany, South Africa, United Arab Emirates, Singapore, India, Australia, Brazil, and Argentina.
  - We also released the Production Order to Costing OMBP for United States, United Kingdom, Canada, Mexico, Germany, South Africa, United Arab Emirates, Singapore, India, Australia, Brazil, and Argentina.

  Related Topic Link: Request Starter Configuration
- Starter Configuration Enhancement: **CX**
  New OMBPs introduced for Sales (including CPQ) and Service for United States and United Kingdom:
  - Customer Contact to Resolution
  - Lead to Opportunity
  - Opportunity to Quote
  - Quote to Revenue
  - Sales Forecast to Field Action

  Related Topic Link: Request Starter Configuration

Release Version 25.1.2

- Starter Configuration Enhancement: **Multi-pillar and country Starter Configuration requests**
  Request and access personalized starter environments for multiple pillars and countries simultaneously, reducing setup time and complexity.

  Related Topic Link: Request Starter Configuration
- Roadmaps Enhancement: **Category added to Roadmap export**

  View features by category in the Roadmap export file.

  Related Topic Link: Adoption Roadmaps
- Starter Configuration Enhancement: **Request Starter Configurations for Sales and CPQ**
  Success Navigator support Starter Configuration requests for Oracle CX Sales and Oracle Configure, Price, Quote (CPQ).

  Related Topic Link: Request Starter Configuration
- Starter Configuration Enhancement: **Review and remediate saved Starter Configuration requests that have failed validation.**

Experience clear guidance for Starter Configuration request validation failures with consistent in-page messaging.

Related Topic Link: Request Starter Configuration

- Starter Configuration Enhancement: **Default Starter Configuration persona passwords**
  Manage default passwords for Fusion Starter Configuration requests for provisioned user accounts.

  Related Topic Link: Request Starter Configuration

- Adoption Center Enhancement: **Redwood Adoption Center simulations**
  The Redwood Adoption center now includes simulations in Enable Redwood. These simulations show you how to enable Oracle search for HCM; a key activity in Redwood adoption.

  Related Topic Link: Adoption Centers

Release version 25.1.1

- Feature Enhancement: **Learn Column in Feature Lists Moved**

  Feature Lists no longer include the Learn column with videos for each feature. Instead, if the feature has a video, it appears in the readiness details drawer that opens when you select the feature.

  Related Topic Link: Assess and Adopt Features

- Adoption Center Enhancement: **AI Adoption Center content update**

  View the latest guidance on AI Agent Studio and AI Governance and Security.

  Related Topic Link: Adoption Centers

- OMBP Enhancement: **Country Tags for OMBP**

  New OMBP country tags help you quickly identify localized use cases, leading practices, and personas.

  Related Topic Link: Learn about Business Processes

Release version: 25.1

- UI Enhancement: **Name and organization added to header**
  Easily find your user name and the organization you're in from the application header to provide consistent context within the platform.

  Related Topic Link: Get Started on the Home Page

- UI Enhancement: **Menu enables access to all functionality**

  Access features from the menu, simplifying navigation between pages.

  Related Topic Link: Get Started on the Home Page

- Home Enhancement: **The feature sunburst visualization aligns with your Production Profile**
  Personalize displayed features in the sunburst visualization utilizing Production Profile data to improve rapid identification of relevant features.

  Related Topic Link: Get Started on the Home Page

- Feature Lists Enhancement: **Export feature lists**
  Export feature lists to CSV files to efficiently review relevant features. If you've filtered your feature list, the exported file includes only the features matching your selected view.

  Related Topic Link: Assess and Adopt Features

- Roadmap and Features List Enhancement: **New filters for roadmaps and features**
  Quickly show a subset of features with enhanced new filters.

  Related Topic Link: Adoption Roadmaps

- Roadmap Enhancement: **Roadmaps customization**
  Customize roadmaps by adding comments and renaming columns.

  Related Topic Link: Adoption Roadmaps

- Home Page Enhancement: **Upcoming Events**
  Search and filter events by date range, segmented by pillar to focus on relevant product events.

  Related Topic Link: Assess and Adopt Features

- Enhancement: **Make T Minus date editable**
  Customize the T-minus timeframes for milestones to align with program and project plans.

  Related Topic Link: Programs and Projects

- Programs and Projects Enhancement: **Program and Projects Team Members**
  Simplify setup by adding users to programs or projects when adding team members to Success Navigator.

  Related Topic Link: My Team

- Programs and Projects Enhancement: **Program and Project Notifications**
  Notify team members when they have been added or removed from a program or project, ensuring transparency for all team members.

  Related Topic Link: My Team

- Starter Configuration Enhancement: **Starter Configuration Access and Resources**
  Admin users can find streamlined access to Starter Configuration details and resources through a redesigned, user-friendly interface.

  Related Topic Link: Request Starter Configuration

- Foundational Journey: **New Journey content**
  Success Navigator now includes Change Adoption content covering Change Management, Adoption, Training, and Change Communications guidance. This content provides collective knowledge and lessons learned from thousands of global implementations.

  Related Topic Link: Journeys

- Adoption Center and Features Lists Enhancement: **Adoption Center features can appear in more than one Adoption Center**
  Features can also be categorized for more than one product.

  Related Topic Link: Adoption Centers

- OMBP Enhancement: **Fusion Foundation Training in OMBPs**
  Access foundational Oracle Cloud application Oracle Modern Best Practice training within Success Navigator, centralizing guidance assets.

  Related Topic Link: Learn about Business Processes

- Starter Configuration Enhancement: **Starter Configuration access**
  Oracle Cloud Success navigator sends the Starter Configuration requestor an email once deployed. This email includes the default password for all of the persona users in the environment, and should be changed immediately after your initial login.

  Related Topic Link: Request Starter Configuration

- Starter Configuration Enhancement: **Starter Configuration deployment requests**

The lead time for your deployment is shown during the request process. so you know when you can expect your Starter Configuration will be deployed.

You can now make Starter Configuration requests using the Safari browser.

Related Topic Link: Request Starter Configuration

Release version: 25A

- Home Page New Feature: **New Home Page**
  The new home page is your launch point for features and content in Oracle Cloud Success Navigator.
  - Recommended actions to help you get started
  - An Innovate section to enable full use of your Oracle product
    * View and manage your Production Profile
    * Find features from the most recent Oracle application update
    * Evolve your application experience with content from the Adoption Center, Evolve Best Practices, and Release Planning
    * View and manage Roadmaps to plan ongoing feature adoption.
  - An Implement section to support the cloud implementation process.
    * Find implementation project resources, including Cloud Journey guidance, Oracle Modern Best Practice, Fusion Onboarding, Cloud Quality Standards, and Oracle Playbooks.
    * View and manage your Starter Configurations.
    * View and manage your programs and projects in Success Navigator.
  - View and manage Team Members and see upcoming events.

  Related Topic Link: Get Started on the Home Page
- Manage New Feature: **Programs and projects**

  Success Navigator now helps you organize simple and complex implementations into programs and projects. Programs define the milestones for any implementation, but if you're running a phased deployment (e.g., wave deployment, stream deployment, or rolling deployment) with independent milestones for different pillars, products, or geographies, you can create projects under the program.

  If you're running an implementation for a simple project, you can set all of the milestones at the program level. But if you're running a large implementation for a phased deployment, set overall milestone dates for the program and specific milestones for each stream in supporting projects.

  Project milestones can inherit dates from the program or use independent milestone dates. You can also share milestone dates from other projects.

  Related Topic Link: Programs and Projects
- Implement New Feature: **Cloud Implementation Milestones**
  Success Navigator now includes Oracle Cloud Implementation Milestones. The Cloud Implementation Milestones page supports your implementation with collective knowledge and lessons learned from thousands of implementations globally. View the milestones for each implementation phase with associated guidance and videos.

  Related Topic Link: Journeys
- Innovate New Feature: **Adoption Centers**

Success Navigator Adoption Centers empower you to find, learn about, and adopt innovative features. This release includes the Redwood Adoption Center and AI Adoption Center with the latest relevant learning resources and implementation guidance.

Related Topic Link: Adoption Centers

- Innovate New Feature: **Feature Adoption Planning**
  We made planning updates easier with these enhancements:
  - Use the interactive "sunburst" visualization to identify, by pillar and product, mandatory features and those that support innovation and efficiency.
  - The Feature Innovation page lists all features by pillar, product, release, category, and impact. Access learning resources, share readiness content, and add features to your Roadmap.

  Related Topic Link: Assess and Adopt Features
- Innovate New Feature: **Roadmaps**
  Plan feature adoption with Success Navigator Roadmaps. Add new features to your roadmap, and organize them to show what you're adopting now, next, and later.

  Related Topic Link: Adoption Roadmaps
- Innovate New Feature: **Evolve Best Practices**
  With Evolve Best Practices, Success Navigator, provides guidance, tips, and resources to help operate effectively and efficiently in the Cloud, while continuously innovating.

  Related Topic Link: Evolve Best Practices
- Implement Enhancement: **OMBP and Starter Configuration Localization**
  Oracle Modern Best Practice (OMBP) and Starter Configuration requests now support localized content, including region-specific use cases and personas.

  Related Topic Link: Request Starter Configuration
- Implement Enhancement: **Journey updates**
  Success Navigator now supports multiple journeys. By default, existing users with initiatives will view the Cloud Implementation Journey. For new programs and projects, all users will default to a Foundational Journey. Customers with Oracle Consulting as their implementation provider can also access the Cloud Implementation Journey.

  Related Topic Link: Journeys
- Manage Enhancement: **Account Portfolio updates**
  The Portfolio Dashboard for users who are members of multiple accounts was renamed to Account Portfolio and updated. It provides account information including details about each account's Production Profile, Programs, Projects, and Roadmaps.

  Related Topic Link: Account Portfolio
- New Feature: **Production Profile**
  Production Profile shows a snapshot of your production status. It includes geographic information about your organization, the pillars you're implementing, and which products you're implementing or are in production.

  Related Topic Link: Production Profile
- New Feature: **Oracle Playbooks**
  Success Navigator now includes Change Adoption content covering Change Management, Adoption, Training, and Change Communications guidance. This content provides collective knowledge and lessons learned from thousands of global implementations.

  Related Topic Link: Oracle Playbooks
- New Feature: **Release Planning**

Success Navigator now includes Release Planning to help you stay ready for regular releases. Find information about the regular release cycle to help you plan and manage releases.

Related Topic Link: Update Planning Center

- Evolve Enhancement: **EPM New Features**
  The Feature List pages (New Features and Adoption Center Features) includes EPM features.

  Related Topic Link: Assess and Adopt Features

- Evolve Enhancement: **Updated e-mail format from Share link**
  The From address for emails received when someone shares a feature from Success Navigator was updated to reduce the likelihood of being filtered as spam. The message also specifies the user sharing the content.

  Related Topic Link: Sign In to Oracle AI Success Navigator

- Manage Enhancement: **New Access Level: Production Profile**
  We've added a new Access Level called Production Team Member. Users with this Access Level can manage Roadmaps.

  Related Topic Link: Access Level Privileges

Release version: 1.3

- **Portfolio Dashboard**
  Oracle Cloud Success Navigator now offers the Portfolio Dashboard for users who are members of multiple accounts. It provides a summary of all accounts and initiatives. You can search, filter, view project details, and easily switch between accounts.

  Related Topic Link: Work with Milestones and Assessments

- **Starter Configuration enhancement**
  You can now request an EPM Starter Configuration. When requesting a Starter Configuration, select the Enterprise Performance Management pillar and a corresponding Starter Configuration. The instructions update based on your selection.

  Related Topic Link: Request and Access Start Configuration

- **SCM and ERP features**
  The Assess and Deploy Release Update activity in Evolve has been enhanced. The features now include SCM and ERP and you can search the features and add extensive filters.

  Related Topic Link: Manage Oracle AI Success Navigator

Release version: 1.2

- UI/UX Enhancement: **Organization name**
  You can update the organization name that appears throughout Oracle Cloud Success Navigator. The default organization name cannot change, but you can add a display name

  If you'd like to request a change to how your organization name appears, contact your Oracle account representative.

  Related Topic Link: Implement

- UI/UX Enhancement: **Terms and conditions**
  We've updated our terms and conditions.

  Related Topic Link: First-time Administrator Setup

- **Release details**

The Assess and Deploy Release Updates activity in Evolve has been enhanced. Highlighted features and quarterly release features can now be accessed more easily by switching between views of the same table. The table itself has been improved to increase usability and offer easier access to feature details.

Related Topic Link: Manage Oracle AI Success Navigator

Release version: 1.1

- **Starter Configuration update**
  The Starter Configuration widget initially showed **No items to display,** but it has now been updated to **Add a starter configuration.**

  Related Topic Link: Request and Access Start Configuration
- **Starter Configuration update**
  The label has been changed from **View My Configurations** to **View Starter Configuration.**

  Related Topic Link: Request and Access Start Configuration

Glossary

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