

Oracle® Customer Success

Oracle AI Success Navigator for OCI User Guide



Release 26.1

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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE®

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

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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 for OCI User Guide** describes how to use Success Navigator for OCI 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](#).

1

Overview of Oracle AI Success Navigator for OCI


Success Navigator for OCI is an interactive digital platform that helps your organization successfully navigate your OCI workload journeys. Success Navigator provides an integrated view to manage and track your workloads, explore step-by-step implementation guidance, and access tools and resources such as OCI Learning Center, Cloud Migration Advisor, and Well-Architected Tool designed to support each stage of your cloud transformation.

- [Get Help](#)
- [Get Help Web Browser Requirements](#)
- [Documentation Accessibility](#)

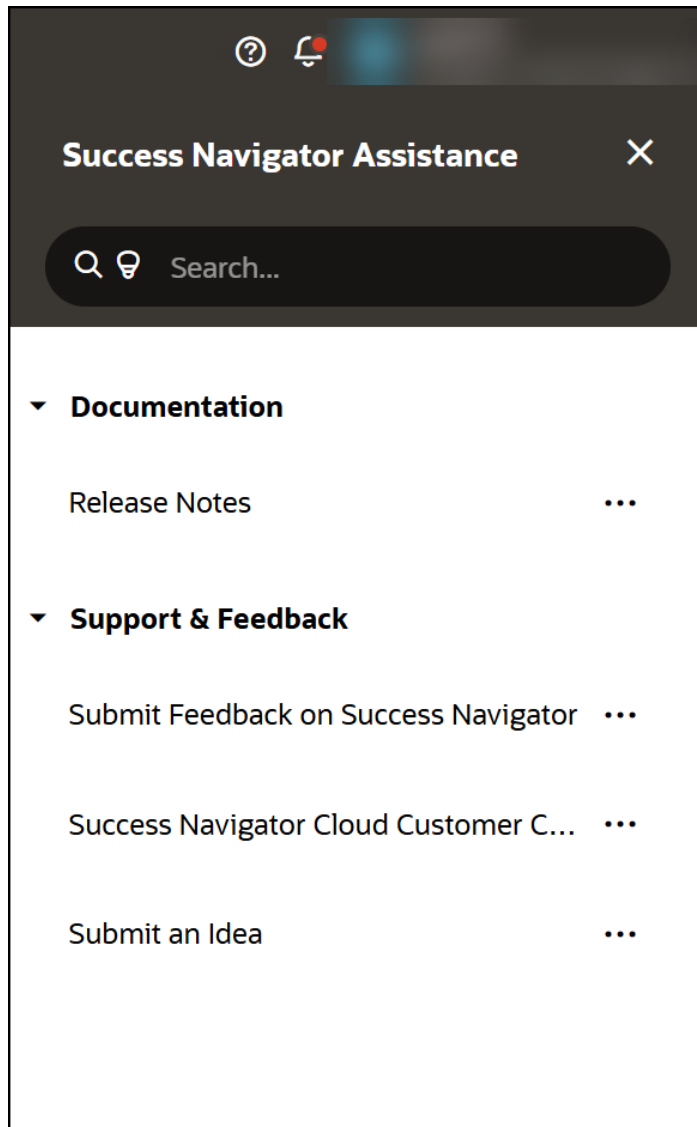
Get Help

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

Get Help in Success Navigator

Success Navigator provides various options from the  help menu at the top right of the application. The help menu offers consolidated access to documentation, release notes, support channels, and feedback options. From the menu, you can access documentation and release notes, submit feedback about Success Navigator, participate in the Success Navigator Cloud Customer Connect community, and submit new ideas for platform enhancements.

Use the search feature to find content related to Success Navigator. The search covers resources available within the help menu—including documentation and support options—but does not search the application itself.



Read the Documentation

Success Navigator includes a detailed User Guide to help you understand how to use the application along with Release Notes to acquaint you with new features and functionality.

Share Your Feedback

We welcome your feedback about Success Navigator and encourage you to:

- Submit a survey about your experience from time to time. To submit feedback, open the help menu and select **Submit Feedback on Success Navigator**.
- 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.

Join Our Community

Access [Cloud Customer Connect](#) from the help menu (**Success Navigator Cloud Customer Connect**) 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.

Get Help 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 for OCI users are listed below:

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

2

Get Started

After you get access to [Oracle AI Success Navigator for OCI](#), 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 for OCI](#)
- [First-time Administrator Setup](#)
- [Sign In to Oracle AI Success Navigator for OCI](#)
- [Get Started on the Home Page](#)

About Oracle AI Success Navigator for OCI

Success Navigator for OCI is a digital platform purpose-built to accelerate and optimize your Oracle Cloud Infrastructure (OCI) projects. By unifying guided, workload-specific journeys with step-by-step implementation support and integrated access to Oracle's trusted tools—including the Cloud Migration Advisor, OCI Learning Center, Well-Architected Tool, and curated reference architectures—Success Navigator empowers teams to move confidently from planning through deployment, all within a single collaborative workspace.

Through Success Navigator for OCI, organizations can tackle critical workloads—including Database Migration, Generative AI, and Multicloud Deployments for AWS, Azure, and Google—with consistent best practices, tailored guidance, and seamless collaboration among Oracle, partners, and customer teams.

Objectives

- Provide guided support for critical OCI workloads through structured journeys for Database Migration, Gen AI Implementation, and Multicloud initiatives.
- Enable secure collaboration by allowing users to upload or link files to a journey, control file access, and add comments, ensuring information is organized and available to authorized team members and partners.
- Accelerate adoption with direct access to the Cloud Migration Advisor (CMA), offering intelligent migration strategies and workload-specific recommendations.
- Give teams the ability to evaluate and optimize architectural plans using the Well-Architected Tool (WAT), ensuring alignment with Oracle best practices for security, reliability, cost, and performance.
- Support effective deployment and ongoing learning with in-platform access to the OCI Learning Center, as well as curated reference architectures and implementation resources.
- Help organizations drive successful cloud adoption by aligning project stakeholders, reducing complexity, and leveraging Oracle's proven methodologies and tools.

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.

- **Manage Workloads:** Get a consolidated view of all your OCI workloads including Multicloud, DB Migration, and Gen AI. View workload distribution by type, monitor recent activities, and quickly access details for ongoing projects, making it easy to stay organized and informed.
- **Guided OCI Journeys:** Follow structured, recommended journeys tailored for initiatives like DB Migration, Gen AI, or Multicloud. Each journey outlines suggested steps for implementation (such as discovery, design, and implementation) along with relevant activities and tools.
- **Tools and Resources:** Access a suite of integrated resources that deliver best practices, streamlined guidance, and pre-built blueprints to support your OCI adoption and ongoing operations.
 - OCI Learning Center: Provides centralized, guided training and resources to help you build skills and confidence at every stage of your cloud journey.
 - Well-Architected Tool: Enables you to assess OCI workloads against best practice pillars and provides actionable guidance to enhance security, reliability, performance, and operational efficiency.
 - Cloud Migration Advisor: Offers expert recommendations and guided steps to plan and execute database migrations to Oracle Cloud Infrastructure, including guidance on compatibility and recommended migration methods.
 - Reference Architecture: Offers proven OCI design patterns and best practices to help you build reliable, scalable, and secure cloud solutions.

First-time Administrator Setup

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. Select Members from the navigation menu to add team members. For more information about managing your team, see [My Team](#). You need to have Team Members available to assign to workloads.
4. Add workloads (for example, Multicloud, DB Migration, or Gen AI), which you will monitor and manage in Success Navigator. For more information about workloads, see [Managing Workloads](#).

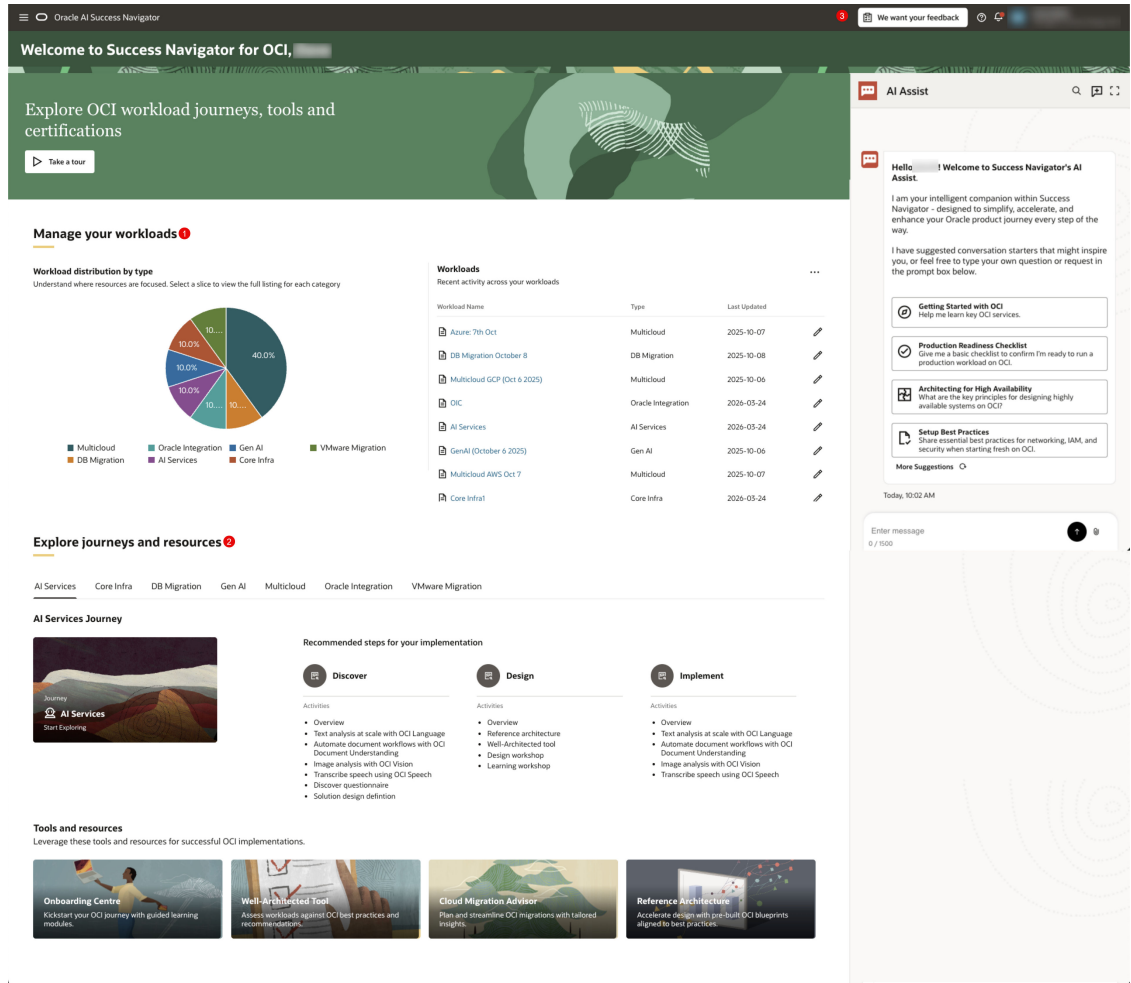
Tip: You don't have to define all the details for each workload immediately. You can start with basic workload information and update specifics or add more workloads as your OCI cloud journey evolves.

Get Started on the Home Page

The home page is your starting point for Oracle Cloud Success Navigator.

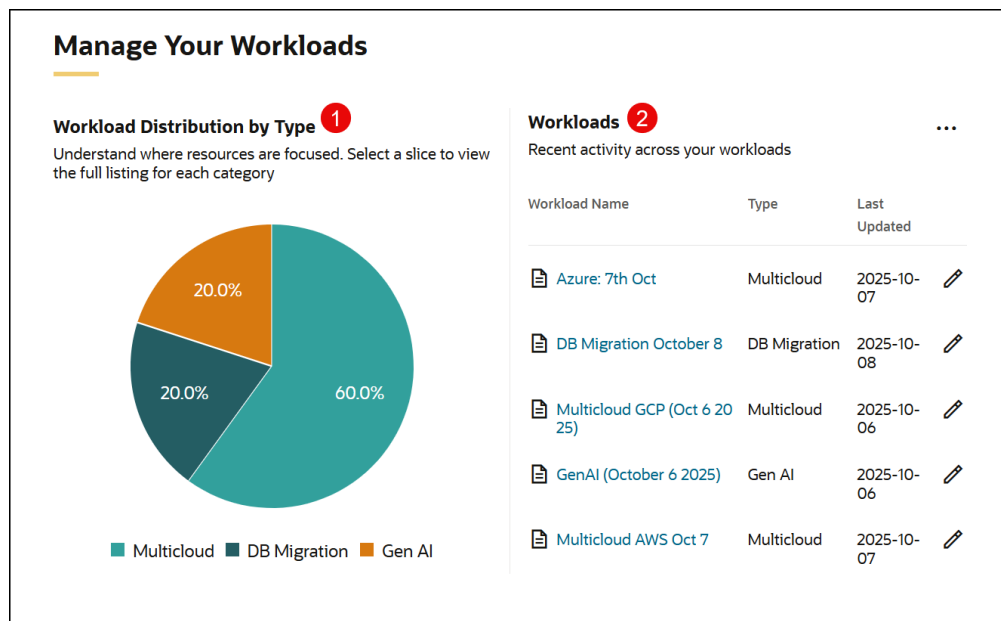
It's organized into four sections:

1. Manage Your Workloads
2. Explore Journeys and Resources
3. Application Header



Manage Your Workloads

The **Manage Your Workloads** section provides tools and information to help you monitor, organize, and efficiently manage your OCI workloads.



1. **Workload Distribution by Type**—Use the interactive chart to explore and visualize how your OCI workloads are distributed across categories such as Multicloud, DB Migration, and Gen AI. Select a segment to filter and view workloads within a specific type. The chart visually represents the proportion of workloads in each category, helping you quickly identify where your resources are focused.
2. **Workloads**—Review a detailed list of all current workloads, including their type and last updated date, to easily track and manage activity in your OCI environment. This section also allows you to create new workloads or update existing workload details as needed.

Explore Journeys and Resources

The Explore Journeys and Resources section provides guided pathways and recommended activities for key OCI initiatives such as DB Migration, Gen AI, and Multicloud along with centralized access to essential tools and resources to support your cloud journey.

This is a read-only template journey that provides guidance and resource recommendations for planning your cloud adoption strategy. Full journey functionality including asset management, progress tracking, and access to Shared Files is available when working within a workload-specific journey, which can be selected from the home page or [Managing Workloads](#) page.

i Note

Shared Files are available only in workload journeys and are not accessible in this template journey.

Explore journeys and resources

DB Migration Gen AI Multicloud

DB Migration Journey ¹

Recommended steps for your implementation

Discover	Design	Implement
<p>Activities</p> <ul style="list-style-type: none"> Discovery Tools Migration Questionnaire Solution Definition Document 	<p>Activities</p> <ul style="list-style-type: none"> Cloud Migration Advisor Reference Architecture Learning Workshop Design Workshop Well Architected Tool 	<p>Activities</p> <ul style="list-style-type: none"> Landing Zone

Tools and resources

Leverage these tools and resources for successful OCI implementations.

² OCI Learning Center Kickstart your OCI journey with guided learning modules.	³ Well-Architected Tool Assess workloads against OCI best practices and recommendations.	⁴ Cloud Migration Advisor Plan and streamline OCI migrations with tailored insights.	⁵ Reference Architecture Accelerate design with pre-built OCI blueprints aligned to best practices.
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1. Journey—Access different read-only base journey such as DB Migration, Gen AI, and Multicloud to focus on your specific OCI implementation goals.
2. OCI Learning Center—The **OCI Learning Center** offers guided learning paths and resources to help you build skills and gain practical knowledge for successfully working with OCI workloads.
3. Well-Architected Tool—The **Well-Architected Tool** helps you assess and optimize your OCI workloads with best practices across security, reliability, performance, and operational efficiency.
4. Cloud Migration Advisor—The **Cloud Migration Advisor** provides expert, real-world guidance to help you plan and execute successful Oracle Cloud Infrastructure database migrations.
5. Reference Architecture—The **Reference Architectures** offer proven design patterns and best practice recommendations to help you quickly plan and build reliable, scalable, and secure solutions on Oracle Cloud.

Application Header

Application header includes the following options:

- **Application Menu**
The application menu in OCI Success Navigator enables quick navigation and is organized by your intentions for using the application: the Manage Your Workloads section provides access to monitoring and managing your OCI workloads, while the Explore Journeys and Resources section offers guided pathways and essential tools to support your cloud initiatives.
- **Feedback Tab**

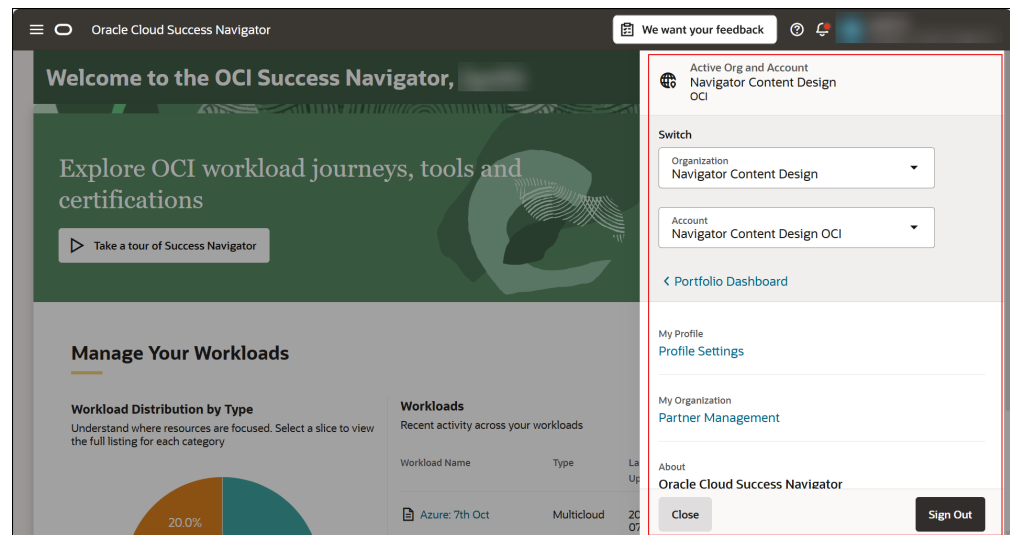
The feedback tab invites you to quickly share your thoughts and suggestions to help improve OCI Success Navigator.

- **Help Menu**
Use the help menu to access documentation, release notes, and support options for OCI Success Navigator. You can also submit feedback, join the Success Navigator Cloud Customer Connect community, and share new ideas for platform improvements. See Get Help for more information.
- **Notification Bell**
See recent activity in your workloads.
- **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.



Sign In to Oracle AI Success Navigator for OCI

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.

3

Using Oracle AI Success Navigator for OCI

Success Navigator for OCI streamlines your cloud adoption journey by providing targeted tools and resources available in the platform.

- [Cloud Migration Advisor \(CMA\)](#)
- [Exploring the Journey](#)
- [Learning Center](#)
- [Managing Workloads](#)
- [Reference Architecture](#)
- [Well-Architected Tool](#)

Cloud Migration Advisor (CMA)

The **Cloud Migration Advisor** delivers expert guidance and best practices for planning and executing database migrations to Oracle Cloud Infrastructure. With Guided Mode, the tool helps you quickly identify which databases can be easily migrated to Oracle Autonomous Database and recommends the best migration methods for your chosen Oracle Cloud platform.

For detailed instructions and information on CMA, see the [Cloud Migration Advisor documentation](#).

Tools and resources
Leverage these tools and resources for successful OCI implementations.

The image shows four tool cards arranged horizontally. The first card is 'OCI Learning Center' with a person reading a document. The second is 'Well-Architected Tool' with a clipboard and checklist. The third is 'Cloud Migration Advisor' with a mountain landscape, highlighted by a red border. The fourth is 'Reference Architecture' with a network diagram.

- OCI Learning Center**
Kickstart your OCI journey with guided learning modules.
- Well-Architected Tool**
Assess workloads against OCI best practices and recommendations.
- Cloud Migration Advisor**
Plan and streamline OCI migrations with tailored insights.
- Reference Architecture**
Accelerate design with pre-built OCI blueprints aligned to best practices.

Access CMA

You can access the Cloud Migration Advisor from the home page or through the menu.

- To access from the home page, go to **Cloud Migration Advisor** under **Tools and Resources**.
- To access from the menu, select **Cloud Migration Advisor**.

Exploring the Journey

In Success Navigator for OCI, a journey is a structured sequence of topics designed to help your team achieve successful outcomes for a particular cloud workload. Each workload—such as Database Migration, Gen AI, or Multicloud for AWS, Azure, or Google—is mapped to a

specific journey that organizes best-practice recommendations and tools into clear Discovery, Design, and Implementation stages. This structured approach helps ensure consistency, clarity, and confidence as you move from initial planning through deployment.

Whether you're implementing Database Migration, Gen AI, or Multicloud scenarios for AWS, Azure, or Google, Success Navigator's journeys provide the clarity and confidence your team needs to achieve outcomes efficiently and effectively.

Accessing Journeys

You can access two types of journeys in Success Navigator for OCI:

- **Base Journey (Template):**
 - Available on the home page or through the menu.
 - These are read-only templates, serving as reference models for each major workload.
 - Templates provide an overview of essential stages and best practices, making it easy to explore recommended steps before starting a project.

Note

Base journeys are view-only; you cannot upload project files or track progress within them.

↑ Home

Stages DB Migration ①

Organization: Navigator Content Design OCI Pillars: OCI

Discover Design Implement

Overview

Discovery tools

Database migration questionnaire

Solution Definition Document

Discovery tools

Discovery tools help collect important technical details from your database environment to support cloud migration planning. These tools need only limited, DBA-approved access and never reach your application or business data, keeping your information safe. They gather metadata such as database version, platform, architecture, CPU and memory specs, storage size, enabled options, object types, character set, time zone, and high availability or disaster recovery settings. This standardized data makes it easier to design your migration strategy with confidence.

Upload and store your completed project files using Shared Files available from the Access Resources button. The files are stored in My Documents and shared with other workload members.

Oracle Estate Explorer (OEE)

Oracle Estate Explorer is a free tool that helps organizations assess their Oracle database environment for a possible migration to OCI, especially Autonomous Database. It analyzes estates to provide insights into migration readiness, costs, and ownership.

[Learn More](#)

Cloud Premigration Advisor Tool (CPAT)

CPAT helps you determine how ready your Oracle database is for migration to Oracle Cloud Infrastructure (OCI).

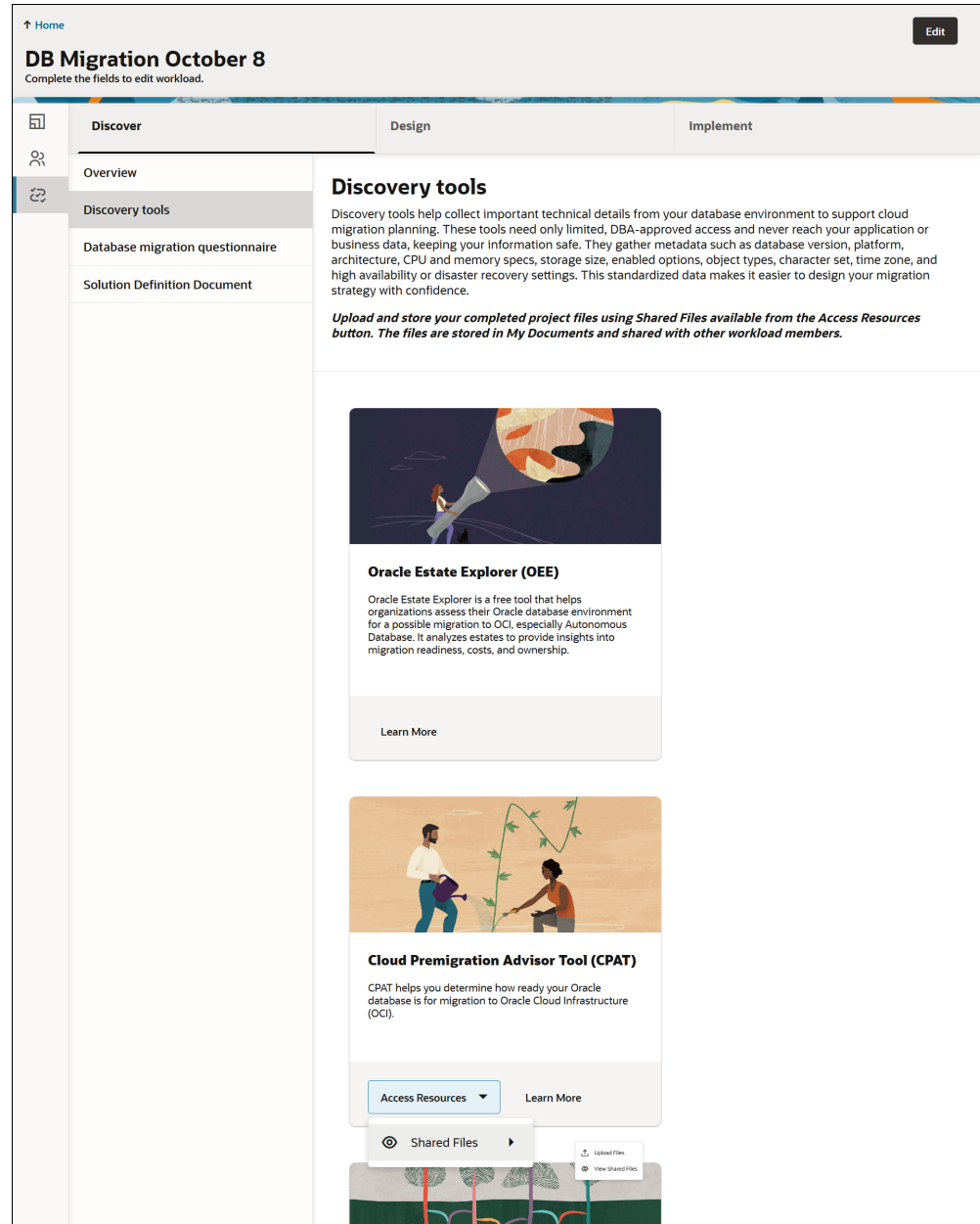
[Access Resources](#) [Learn More](#)

[Shared Files](#)

You can only upload files to a workload journey, not a template journey.
To access a workload journey, select a workload on the home page or the [Workloads page](#).

- **Workload Journey:**
 - When a workload is set up, a dedicated journey is automatically created for that specific workload.
 - Access to a workload journey is exclusive to the assigned members of that workload.
 - Workload journeys enable you to:
 - * Collaborate and upload project files
 - * Document decisions and assign roles
 - * Track team progress through all stages

- Workload journey turns best-practice guidance into actionable steps, keeping your project organized, transparent, and aligned with Oracle's standards.



Feature	Base (Template) Journey	Workload Journey
Purpose	Exploration and planning	Management and execution
Access	Open to all users	Restricted to assigned members
Editability	Read-only	Editable and collaborative
File uploads	Not available	Available
Progress tracking	Not available	Available

Learning Center

The OCI Learning Center offers a centralized source for guided learning, practical resources, and skill-building activities to support you at every stage of your cloud journey. Each learning path is organized into focused modules and training content that align with key phases and milestones for adopting and managing OCI workloads, empowering you to build expertise and confidence throughout your implementation and beyond.

Access Your Learning Paths

You can access learning paths from the home page or the menu.

- To access learning paths from the home page, select **OCI Learning Center** in the Explore Journeys and Resources section.
- To access learning paths from the menu, select **Learning Page**.

Each learning path is organized into the following elements:

- An overview that introduces the path and provides context for the workload or topic.
- Modules that deliver focused lessons on essential OCI concepts and best practices, each with clear, practical video demonstrations.
- Progress tracking that lets you monitor your advancement through the modules and revisit any topics at any time.

Selecting and Viewing Learning Paths

At the top of the Learning Center, you can easily switch between different learning paths, such as Getting Started with OCI, Learn by Services, or Learn by Roles. This flexibility allows you to focus your training on the topics and workloads that best match your cloud journey.

Managing Workloads

In Success Navigator for OCI, a workload represents a focused project or solution area—such as database migration, generative AI, or multicloud deployment. At its core, a workload is a collection of resources and configurations in Oracle Cloud Infrastructure (OCI) that work together to deliver a specific outcome, whether that's moving data to the cloud, implementing new AI capabilities, or integrating across cloud platforms.

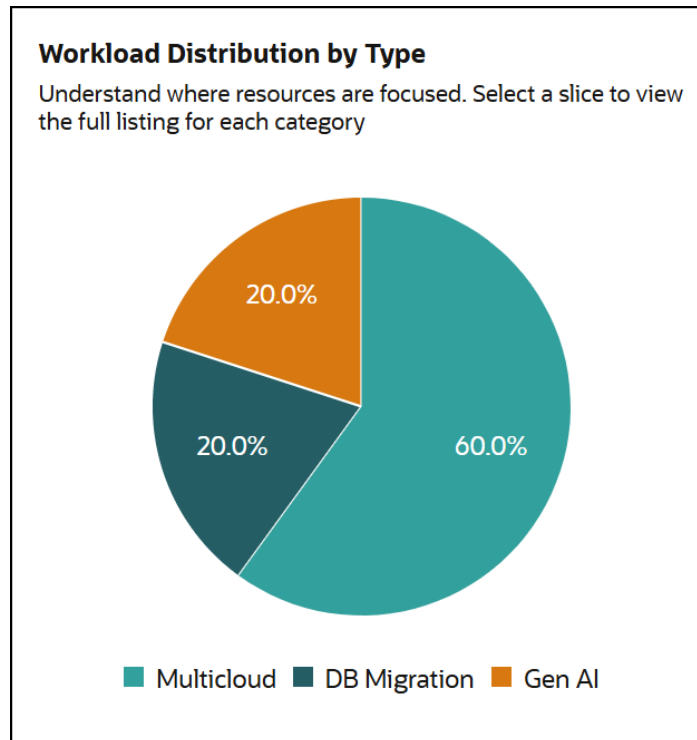
Currently, Success Navigator for OCI supports five workload types: Database Migration, Generative AI, and Multicloud deployments for Azure, AWS, and Google. When you create a workload, you unlock an interactive journey tailored to your objectives, with hands-on activities, real-time collaboration, and secure file management. Each workload has its own group of members, and only those members can access and contribute to the project, ensuring both focus and security as you work toward your goals.

In the Manage Your Workloads section, you can:

- **See Workload Distribution:** Use visual charts to understand how your workloads are spread across different types, like Multicloud, DB Migration, and Gen AI.
- **View Summary Information:** Quickly see key details such as workload names, categories (types), and last updated dates for all your workloads.
- **Add or Edit Workloads:** Use the options menu to add new workloads or update existing ones, making it easy to keep your workload information up to date.

Familiarize yourself with the workload information on the home page:

- **Workload Distribution by Type**—Use the interactive pie chart to visualize and analyze the distribution of your workloads by type such as Multicloud, DB Migration, and Gen AI. Select any segment of the chart to filter and view a detailed listing of workloads within that category. The chart provides a clear, visual breakdown of where your resources are focused, making it easy to identify trends and allocate effort appropriately across your OCI environment.



- **Workloads** — Get quick access to monitoring, tracking, and organizing all your OCI workloads in one centralized view. This section provides a list of workloads in your organization that you are a member of, their type, and when they were last updated. Select any workload from the list to access the workload.

Workload Members

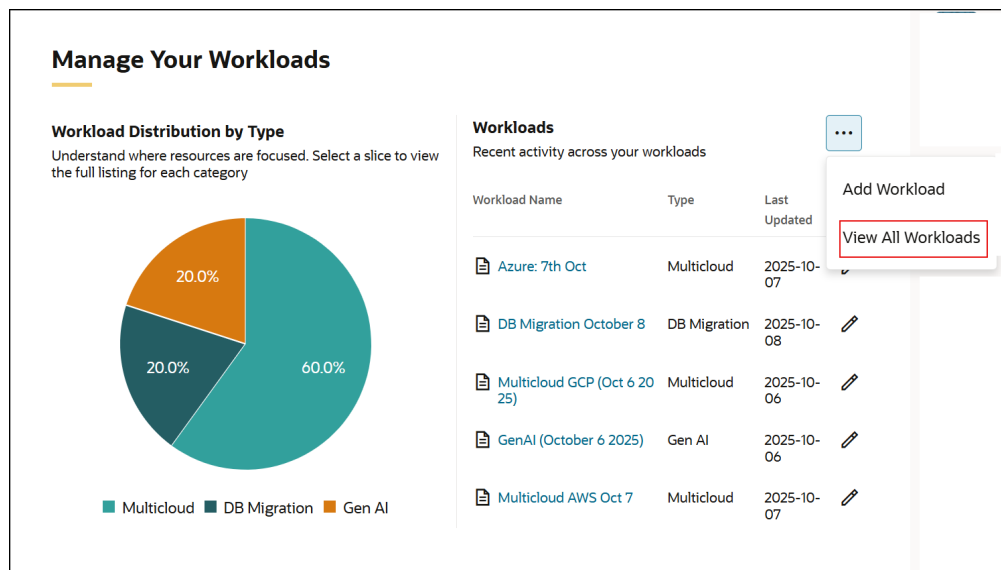
Workload Members allow you to control access to specific workloads, even for users with Admin Access Level. To view or edit a workload, you must be a Workload Member.

Viewing Workloads

You can access and manage your workloads from the home page or through the menu.

- To access workloads from the home page, go to the **Manage Your Workloads** section.
- To access workloads from the menu, select **Workloads**.

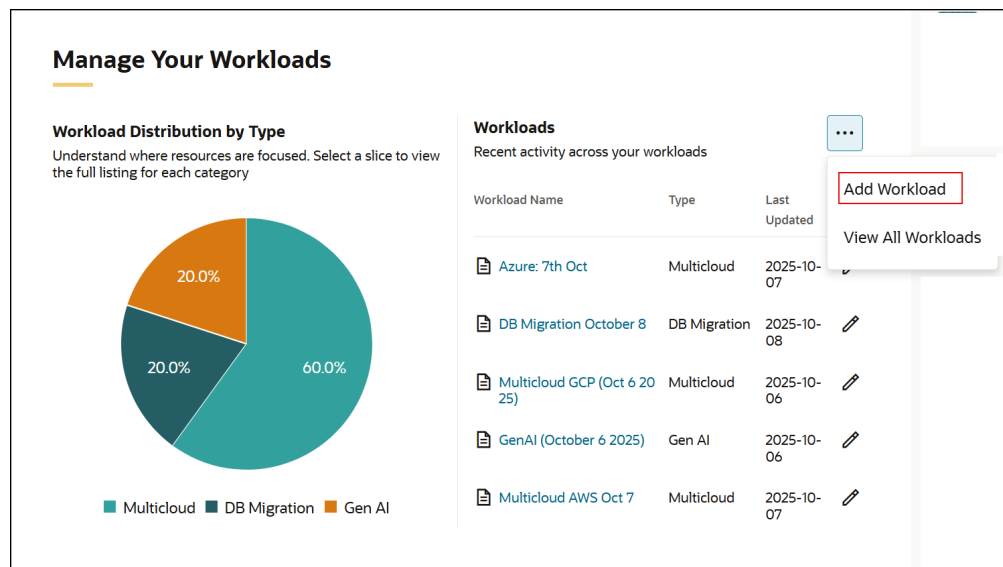
To view all workloads, use the options menu and select **View All Workloads**. This gives you access to a complete list of your workloads, allowing you to review recent activity, workload types, and last updated dates for better oversight and planning.



Creating Workloads

To get started with managing your OCI workloads, you'll need to create a new workload. Follow the below steps:

1. Select **Add Workload** from the options menu available from



2. Enter the workload information, including Name, Status, Implementation Partner, Description, Notes, and Workload Type.

Note

Selecting **Add a new partner** now will take you to the [Partner Management](#) page and any unsaved information will be lost. You can finish creating the workload and add the partner later.

↑ Home Cancel Submit

Create Workload

Complete the fields to create your workload.

Workload Information

Members

Name Required Status **Active** Implementation Partner Add a new partner

Description Required Notes

Workload Type Required

3. Select **Submit**.
4. Add members.


 **Note**











The member list displays only users who are part of [My Team](#). To add someone to a workload, ensure they are first added to **My Team**.

5. Select Submit to save the workload.

Edit workloads

To update an existing OCI workload, follow these steps:

1. Select  next to the workload you want to update in the Workloads list.

Workloads			...
Recent activity across your workloads			
Workload Name	Type	Last Updated	
 Azure: 7th Oct	Multicloud	2025-10-07	
 DB Migration October 8	DB Migration	2025-10-08	
 Multicloud GCP (Oct 6 2025)	Multicloud	2025-10-06	
 GenAI (October 6 2025)	Gen AI	2025-10-06	
 Multicloud AWS Oct 7	Multicloud	2025-10-07	

- Update the workload information as needed, including Name, Status, Implementation Partner, Description, Notes, and Workload Type.

Note

Selecting **Add a new partner** will take you to the [Partner Management](#) page and any unsaved changes will be lost. Complete your edits and save before adding a new partner.

- Select **Save and Continue**.
- Edit or update workload members as needed.

Note

The member list displays only users who are part of [My Team](#). To add someone to a workload, ensure they are first added to **My Team**.

- Select **Save and Continue** to apply your changes.

Reference Architecture

Reference Architectures provide a centralized resource for proven OCI design patterns and best practices, helping you plan and implement reliable, scalable, and secure cloud solutions.

Selecting Reference Architecture opens the base journey directly to the architecture topic, providing immediate access to the same trusted resources and guidance available within the journey.

Tools and resources
Leverage these tools and resources for successful OCI implementations.



The image shows four tool cards arranged horizontally. The first card is 'OCI Learning Center' with a person holding a flag. The second is 'Well-Architected Tool' with a hand holding a checklist. The third is 'Cloud Migration Advisor' with a landscape. The fourth is 'Reference Architecture' with a dark background and colorful dots. The 'Reference Architecture' card is enclosed in a red rectangular border.

- OCI Learning Center**
Kickstart your OCI journey with guided learning modules.
- Well-Architected Tool**
Assess workloads against OCI best practices and recommendations.
- Cloud Migration Advisor**
Plan and streamline OCI migrations with tailored insights.
- Reference Architecture**
Accelerate design with pre-built OCI blueprints aligned to best practices.

Access Reference Architectures

You can access Reference Architectures from the home page under **Tools and Resources** or from a journey in the Design stage.

Highlights of Reference Architecture

- **List of Reference Architectures**
Access a list of reference architecture cards, each with a brief overview and a Learn More link.
- **Explore More**
Select **Learn More** on any card to see detailed explanations and find additional links for related topics and further guidance.

Reference Architecture

Oracle's reference architectures are concise guides that showcase proven design patterns for specific use cases. They provide best practice recommendations across compute, networking, storage, and security. Use them to plan faster, align with trusted topologies, and design reliable, scalable, and secure solutions on Oracle Cloud.



Oracle ZDM - Logical Offline Migration to ADB-S on Oracle DB@Azure

This architecture illustrates how Oracle Zero Downtime Migration (ZDM) supports a logical offline migration of an on-premises Oracle database to Autonomous Database Serverless (ADB-S) on Oracle Database@Azure.

[Learn More](#)



Oracle ZDM - Logical Offline Migration to ExaDB-D on Oracle DB@Azure

This architecture shows how Oracle Zero Downtime Migration (ZDM) enables a logical offline migration of an on-premises Oracle database to Exadata Database Service on Dedicated Infrastructure (ExaDB-D) running on Oracle Database@Azure.

[Learn More](#)




Using AI Assist

This topic covers how you use AI Assist to chat, manage your chat history, and more.

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.

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.

Well-Architected Tool

The **Well-Architected Tool** helps you evaluate your OCI workloads against Oracle's best practice pillars: Security & Compliance, Reliability & Resilience, Performance & Cost Optimization, and Operational Efficiency. This tool offers step-by-step guidance, highlights gaps, and provides insights to strengthen your cloud environment.

Tools and resources
Leverage these tools and resources for successful OCI implementations.

OCI Learning Center
Kickstart your OCI journey with guided learning modules.

Well-Architected Tool
Assess workloads against OCI best practices and recommendations.

Cloud Migration Advisor
Plan and streamline OCI migrations with tailored insights.

Reference Architecture
Accelerate design with pre-built OCI blueprints aligned to best practices.

Access Well-Architected Tool

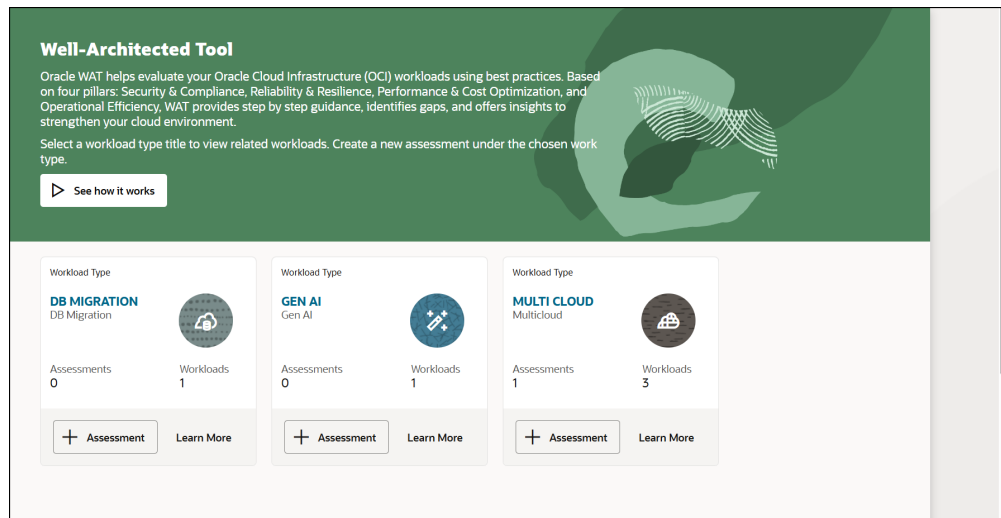
You can access the Well-Architected Tool from the home page or through the menu.

- To access from the home page, go to the **Well-Architected Tool** under **Tools and Resources**.
- To access from the menu, select **Well-Architected Tool** under **Discovery Tools**.

Highlights of Well-Architected Tool

- **Workload Type Selection**—Select a workload type (For example, DB Migration, Gen AI, Multicloud) to view associated workloads and start a new assessment.
- **Assessments**—Create a new assessment for a workload to receive actionable feedback and recommendations based on best practices.
- **Learn More**—Select **Learn More** to get further details about each workload type and the assessment process.

For a guided introduction, use the **See how it works** option at the top of the page.



Manage Assessments

You can efficiently manage your Well-Architected Tool assessments by using the following features and actions:

- **Create Assessments:** Start a new evaluation by providing assessment details and associating it with a workload. This enables you to benchmark your workload against Oracle's best practices.
- **Viewing Assessments by Workload Type:** Filter and view all assessments for a specific workload type (such as Multicloud, DB Migration, or Gen AI) to organize and analyze relevant results efficiently.
- **Assessment Status:**
 - In Progress – The assessment has been started but not yet completed; you can resume work on it at any time.
 - Completed – The assessment is finished; the results are available for review, download, and further actions.
- **Downloading Assessments:** Export individual assessment data in a downloadable format for record-keeping or offline review.
- **Deleting:** Remove assessments that are no longer needed to keep your list streamlined and organized.
- **Resuming Unfinished Assessments:** Click on any assessment marked In Progress to continue and complete the evaluation where you left off.
- **Retaking Assessments:** For completed assessments, select the **Retake** option to perform a fresh evaluation based on updated workload configurations or requirements.

Total Assessment: 3 Available
Best Score Assessment: 20 Available

Assessment Workload search...

3 Assessments + Assessment Delete

Assessment Name	Assessment taken by	Status	Score	Date Taken	Version	Workload	Action
<input checked="" type="checkbox"/> 1st test	[Redacted]	Completed	20	05-11-2025	2	Azure: 7th Oct	...
<input type="checkbox"/> 2nd test	[Redacted]	In Progress	0	03-11-2025	1		Retake
<input type="checkbox"/> 1st test	[Redacted]	Completed	18	03-11-2025	1		Download Delete

4

Manage Oracle AI Success Navigator for OCI

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

- My Team
- Access Level Privileges
- Partner Management
- My Documents

My Team

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

Team Member Attributes

Each team member has several attributes, including name, email, role, and details about their involvement with Success Navigator for OCI workloads. While most fields are self-explanatory, the following attributes can significantly affect access and permissions within the application:

- 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:
 - Admin—Admins have full access to view and make updates in Success Navigator.
 - Contributor—Contributor have access to most areas of Success Navigator and can update assessments for workloads where they are team members.
 - Viewer—Viewers have view-only access.
- Associated Workloads—Specifies which OCI workloads the team member is linked to. This controls visibility and management rights for specific workloads and ensures the right people have access to relevant resources.
- Role—The function you perform in the Oracle project.

Add Team Members

Users with the Admin Access Level can add Team Members.

To add a Team Member:

1. Select **Add Members** from the Team Members page.
2. Enter the team members first name, last name, and email.



3. In 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 Associated Workloads, select the OCI workloads the user should have access to.
7. Enter optional comments.
8. 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 associated workloads for each team member.

To update a Team Member

1. Get to the Team Members page:
 - From the menu, select **Members**.
 - From the My Team section, select , and then select **Add 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 for OCI, along workloads. Privileges are managed by Access Levels. Success Navigator includes the following Access Levels, ordered from most privileges to least:

- Admin—Admins have full access to view and make updates in Success Navigator for OCI.
- Contributor—Contributor have access to most areas of Success Navigator for OCI and can update workloads where they are team members.
- Viewer—Viewers have view-only access.

You can be assigned more than one Access Level. If that happens, you will have the privileges of the highest access level.

	Viewer	Contributor	Admin
View the home page	x	x	x
View journeys	x	x	x

	Viewer	Contributor	Admin
View Team Members	x	x	x
Add an edit team members			x
View Workloads	x	x	x
Add workloads			x
Manage workloads			x
Cloud Migration Assistant (CMA)	x	x	x
Exploring the journey	x	x	x
Downloading journey resources	x	x	x
Uploading journey resources		x	x
Learning Center	x	x	x
Reference Architecture	x	x	x
Well-Architected Tool	x	x	x
Take assessments		x	x
Update assessments		x	x
View My Documents	x	x	x
Upload My Documents		x	x
View Release Planning	x	x	x

Partner Management

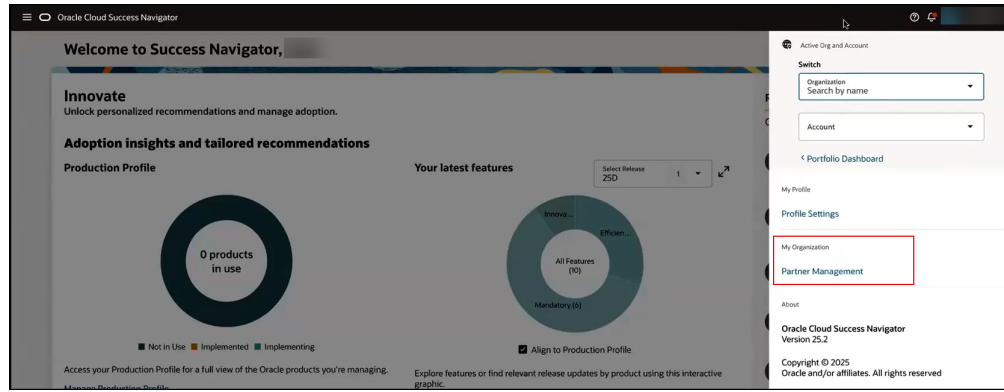
Partner Management allows you to add and manage implementation partners, making only your selected partners available when creating Workloads.

Note

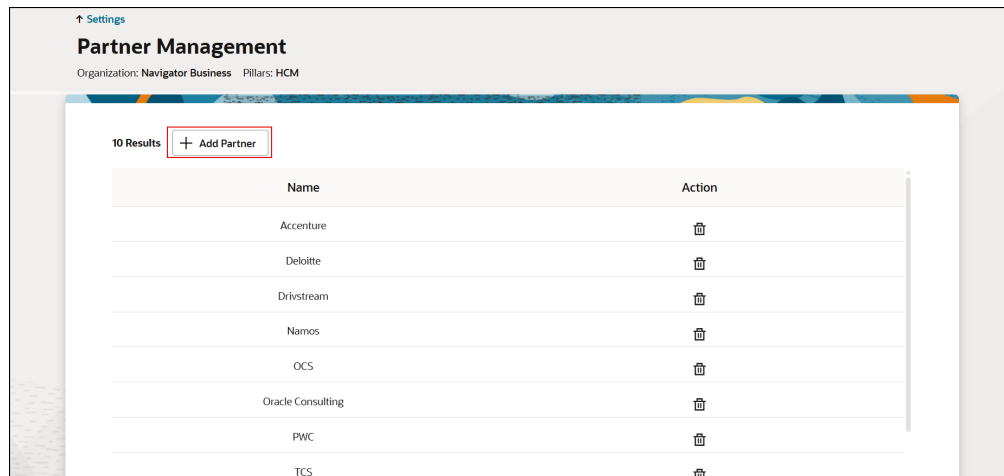
You can also set up the partner when creating or editing a workload.

To add the partner to the list:

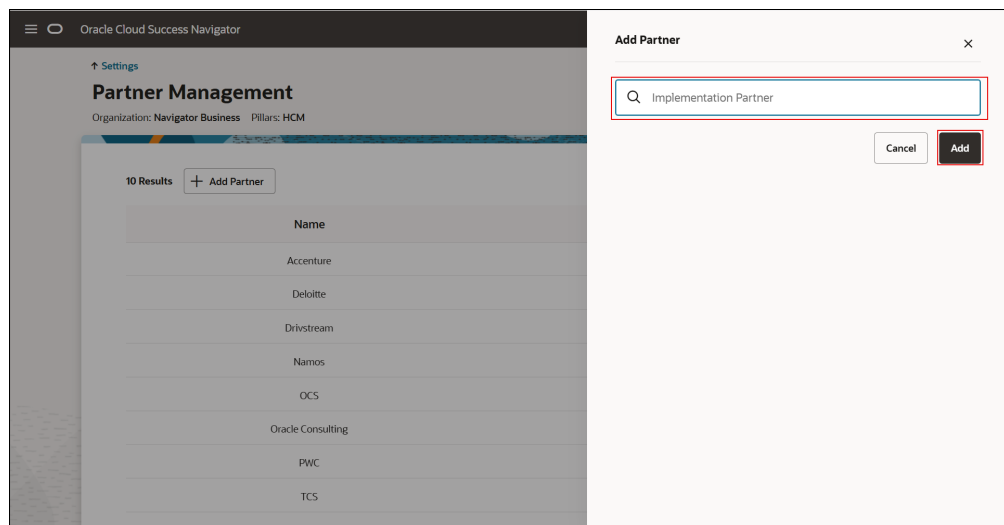
1. Select your profile on the home page.
2. Select **Partner Management** under My Organization.



3. Select **Add Partner**.



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



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. Select **My Documents** from the menu.
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 by selecting it or dragging and dropping it into the upload area, or enter the URL in the **Add 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.


- **Workloads**—Select the workloads to associate with the document.
- **Journey**—If the workload 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.

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. Select **My Documents** from the menu.
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. Select **My Documents** from menu.
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.

5

Release Notes

Learn about the latest features, changes, and improvements in Success Navigator for OCI. 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 Success Navigator for OCI, highlighting the latest features, changes, improvements and enhancements.

Release Version 26.1 (May)

With the 26.1 version of Success Navigator, we've changed the name to AI Success Navigator for OCI.

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

- Foundation Enhancement: **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.
 - Admin—Full access to all features and users.
 - Contributor (formerly Member)—Contribute can update workloads where they are team members.
 - Viewer—View content.
- Foundation Enhancement: **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](#)

Release Version 26.1

- Managing Workloads Enhancements:
 - **AI Services**
New Workload Journey and WAT questionnaires supporting prebuilt OCI AI capabilities (e.g., vision, language, speech) to add AI features without building models from scratch.
 - **Core Infrastructure**
New Workload Journey and WAT questionnaires supporting foundational OCI services (compute, storage, networking, security, IAM) for running and operating cloud environments reliably.

- **Oracle Integration Cloud**
New Workload Journey and WAT questionnaires supporting iPaaS for connecting SaaS/on-prem systems via adapters, orchestration, API management, events, and automation.
 - **VMware Migration**
New Workload Journey and WAT questionnaires supporting migration of VMware-based workloads to OCI (e.g., OCI VMware Solution) while retaining familiar VMware tools and operational models.
- Related Topic Link:** [Managing Workloads](#)

2025 Release Notes

This section provides the 2025 release notes for Success Navigator for OCI, highlighting the latest features, changes, improvements and enhancements.

Release Version 25.2.2

- **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. Use the default prompts or enter your own.

Related Topic Link: [Using AI Assist](#)

- OCI Learning Center Enhancements:

- **New Learning Paths**
Learning Paths are now organized around training categories, including paths for Getting Started, role-based paths, and services-based paths.
- **Enhanced modules**
The module cards within each Learning Paths now include course descriptions and a status indicator so you can see progress at a glance.

Related Topic Link: [Learning Center](#)

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.
- **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.

Glossary

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