Oracle® Customer Success

Oracle Cloud Success Navigator User Guide

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Preface

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

Purpose Statement

The **Oracle Cloud Success Navigator User Guide** describes how to use Oracle Cloud 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 Cloud Success Navigator

Oracle Cloud 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 more.

- Get Help
- Web Browser Requirements
- Documentation Accessibility

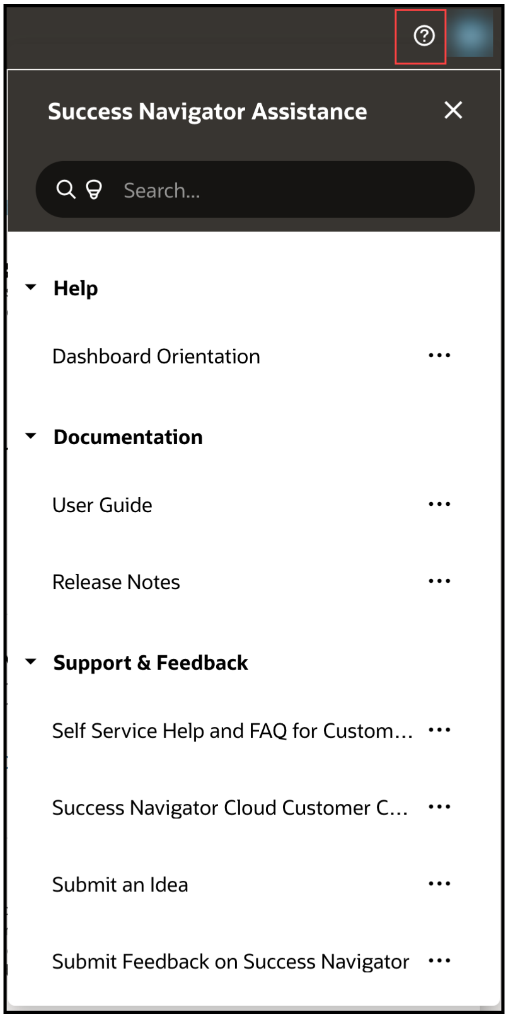
Get Help

There are several ways to learn more about Oracle Cloud Success Navigator, 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 includes consolidated 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.

Use the search to find content about Success Navigator. The search function looks for information available in the help menu but does not search the application itself.



Get In-App Help
The Help section of the menu shows all available interactive guides for the page. 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
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.

Answer Questions and Get Support in the FAQ
The Support & Feedback section includes a Self Service Help and FAQ link targeted for your role as a customer, partner, or Oracle resource. On this page, you can:

- Find FAQs by category, and if you can't find the answer you're looking for, select **Log Ticket**.
- See your previously submitted tickets.

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.

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.

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 Oracle Cloud Success Navigator 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.

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Get Started

After you get access to Oracle Cloud 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 Cloud Success Navigator
- First-time Administrator Setup
- Sign In to Oracle Cloud Success Navigator
- Get Started on the Home Page

About Oracle Cloud Success Navigator

Oracle Cloud 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, Oracle Cloud Success Navigator equips you with the tools you need to thrive in the cloud. Find more information on the Oracle Cloud 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**: Oracle Cloud 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.

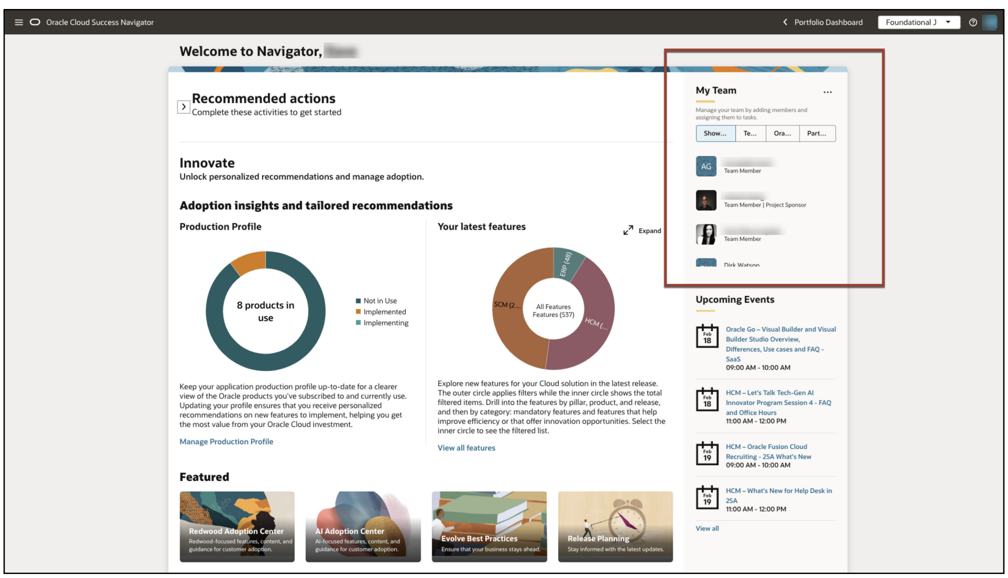
- **Quarterly update adoption**: Oracle Cloud Success Navigator highlights innovation opportunities with each Oracle quarterly release based on business processes, data insights, and industry benchmarks to help you best leverage the updates and maximize value. Support continuous innovation with Adoption 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 Oracle Cloud Success Navigator. After you sign in, review the Recommended Actions, which include tasks to get you started with Success Navigator.

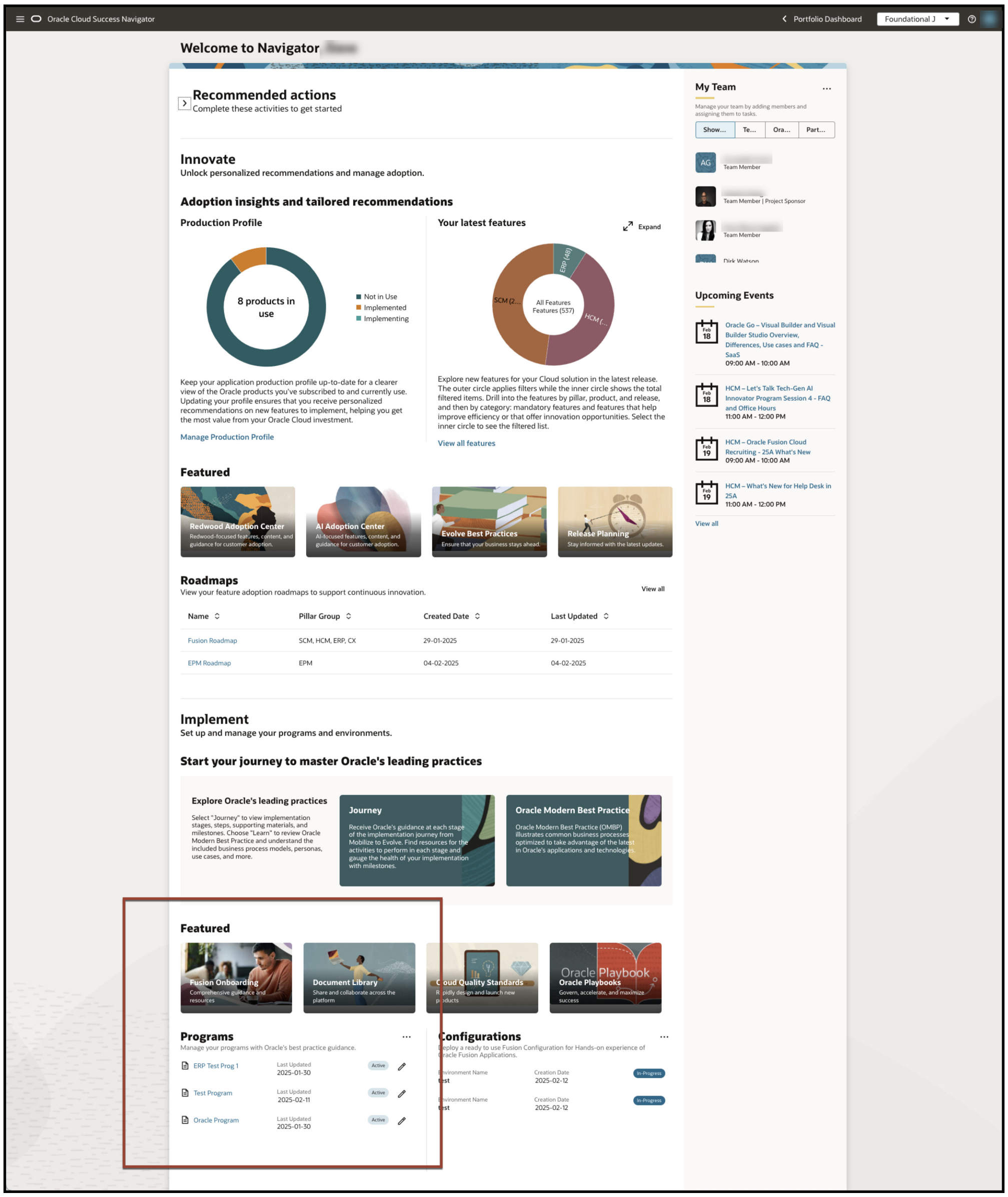
To set up Success Navigator

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. 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.

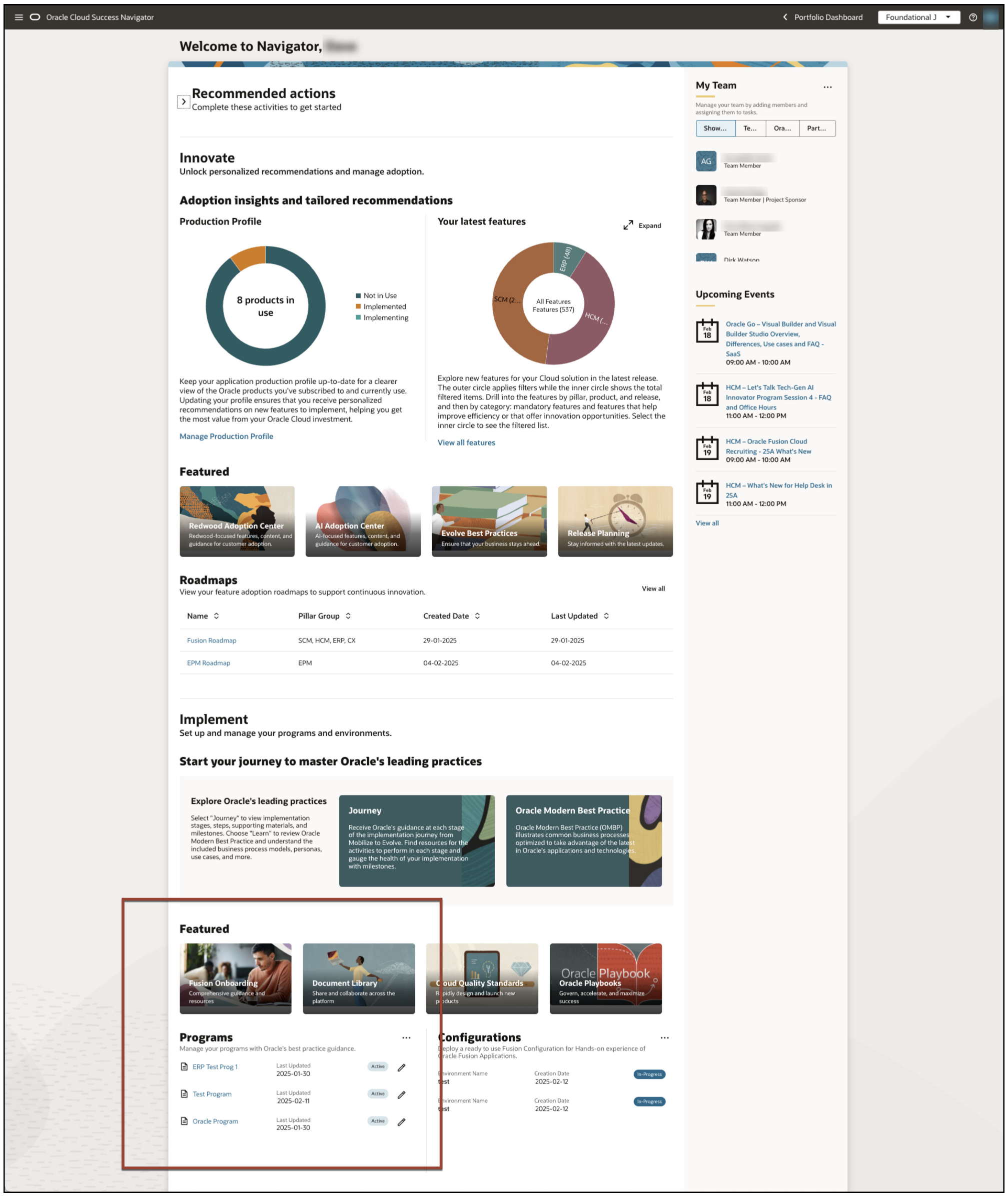


5. Add programs and projects. For more information about programs and projects, see Programs and Projects.Programs represent your high-level implementation, while projects represent discrete implementation for phased or wave deployments.

> **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.



6. 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 Cloud 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.

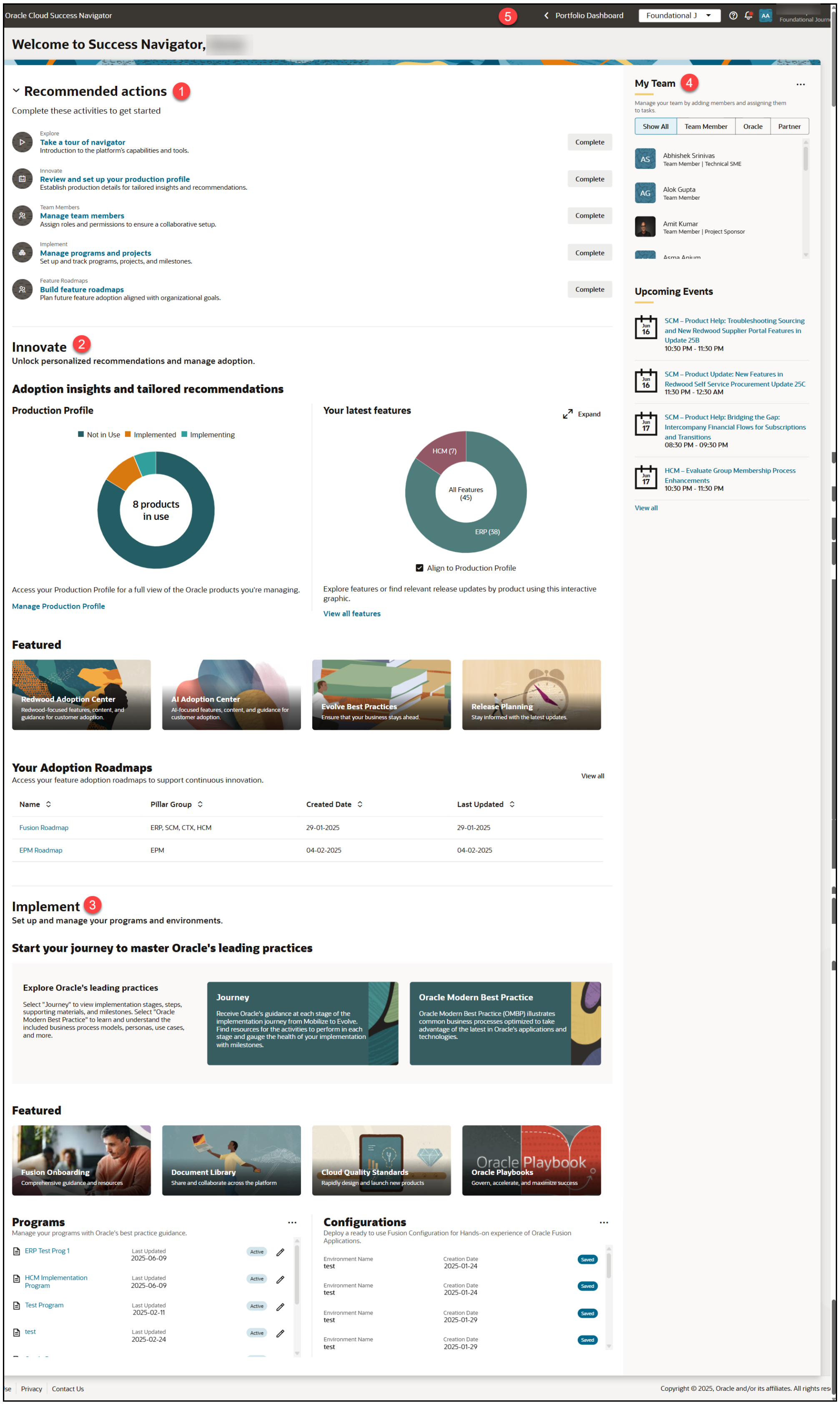
Get Started on the Home Page

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

It's organized into four sections:

1. Recommended Actions

2. Innovate
3. Implement
4. Sidebar
5. Application Header

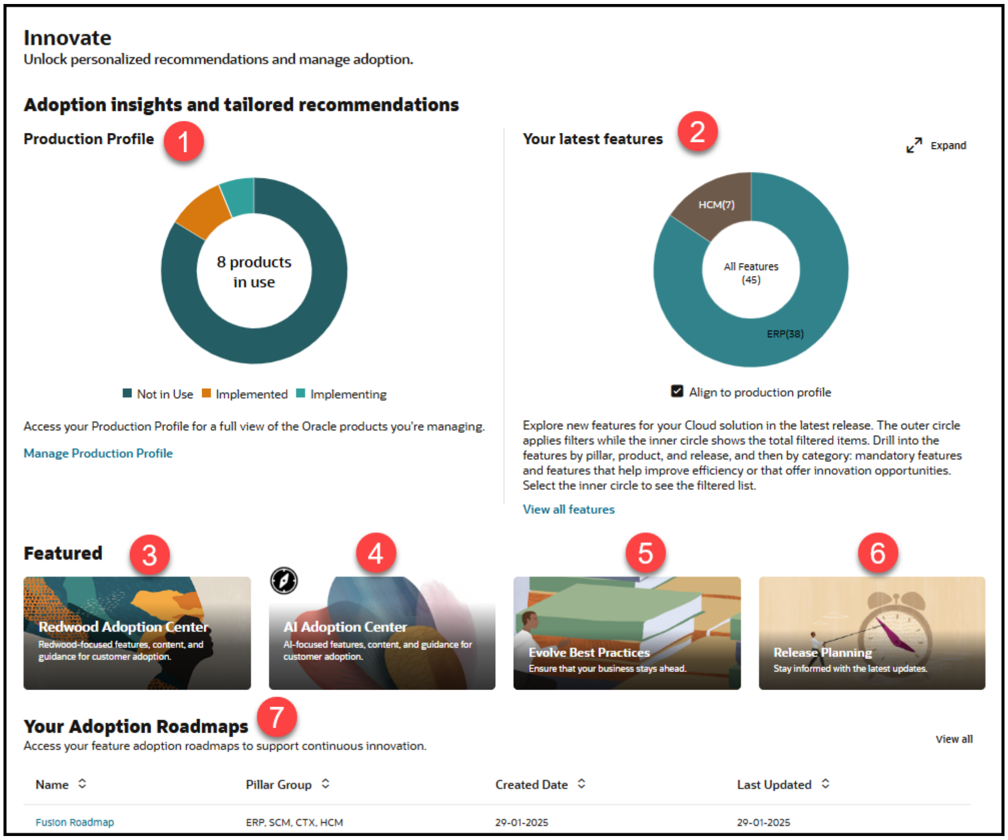


Recommended Actions

The Recommended Actions 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.

Innovate

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

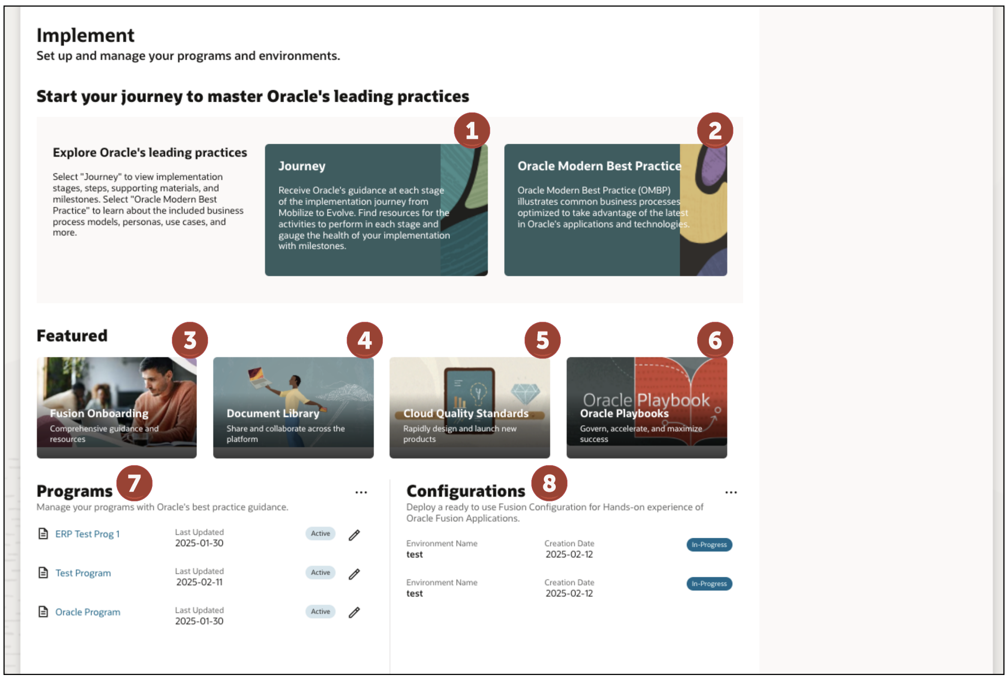


1. Production Profile—Your Production Profile defines the details of the Cloud Applications that you're tracking in Success Navigator. It aligns to the pillars and products displayed by default in the Your Latest Features sunburst visualization.
   a. To return to the Account Portfolio, select **Portfolio Dashboard** in the upper-right.
   b. To switch accounts, select an account from the list next to Portfolio Dashboard in the upper-right.
2. Your Latest Features—Use the sunburst visualization to quickly access a filtered feature list of the data in your Production Profile. To use the visualization, start by selecting a pillar, product. After drilling into the release, select a feature category (e.g., Mandatory, Innovation, Efficiency). At any time, select the inner circle to see the filtered list. 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. Evolve Best Practices—Best Practices offers guidance, tips, and resources to help organizations operate effectively and efficiently in the Cloud while continuously innovating.
6. Release Planning—Evolve Best Practices offers guidance, tips, and resources to help organizations operate effectively and efficiently in the Cloud while continuously innovating.
7. 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.



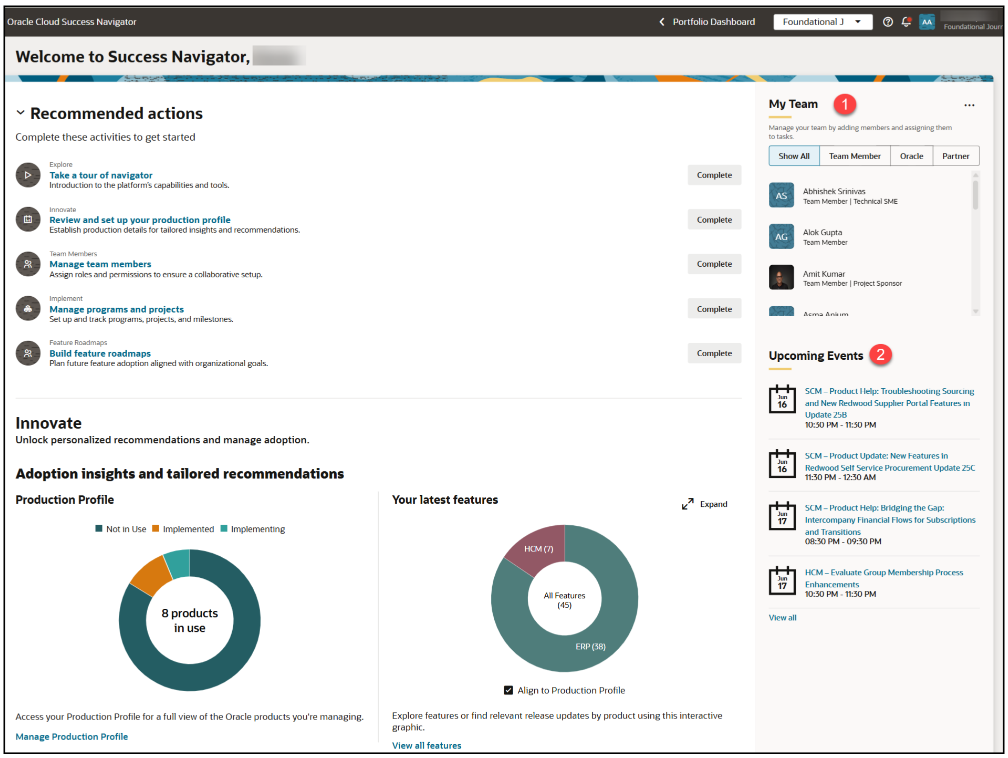
1. Journey—Journeys offer a centralized source of information, learning resources, activities, and resources to guide you during the implementation project.
2. Oracle Modern Best Practice—Get detailed business processes optimized to take advantage of the latest in Oracle's applications and technologies. Access business process models, videos, step-by-step guides, persona definitions, use cases, Oracle leading practices, and KPIs.
3. Fusion Onboarding—View recommended training and enablement resources for all stakeholders involved with adopting Oracle Fusion Applications.
4. Document Library—Share documents with team members and assign them to specific projects and stages in a Journey.
5. Cloud Quality Standards—Find resources and videos to help you learn about the must-haves for a successful Cloud-enabled business transformation.
6. Oracle Playbooks—Discover resources, training, and videos about strategies Oracle has used to grow revenue over the last 20 years.

7. Programs—View and manage the programs and projects that allow you to organize your implementations and define milestones for them.
8. Configurations—Starter Configurations to support and accelerate your implementations, helping drive design discussions with configurations aligned to Oracle Modern Best Practices.

Sidebar

The sidebar includes quick access to view and manage Team Members and access upcoming events.

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 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 and sign out.

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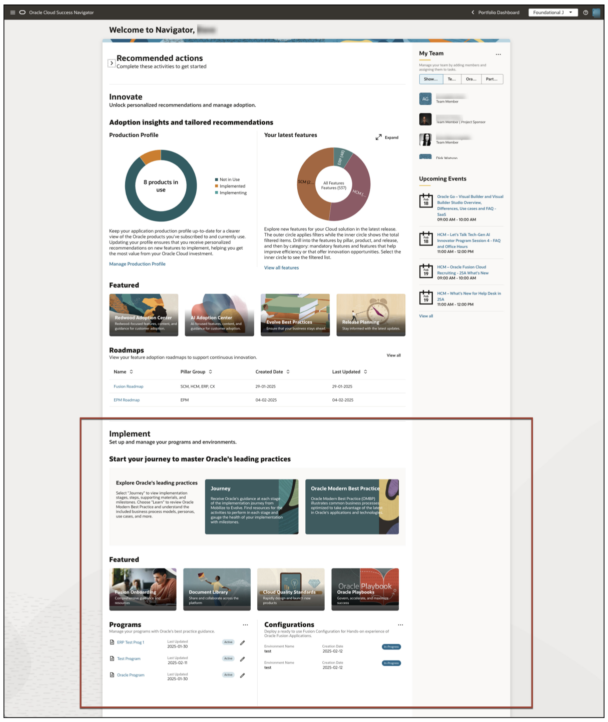
Implement

Oracle Cloud 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 Quality Standards
- Oracle Modern Best Practice
- Request and Access Start Configurations
- Oracle Playbooks
- Fusion Onboarding
- Work with Milestones and Assessments

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 multiple customized journeys. In 25A, all customers can access the Foundational Journey, while customers with Oracle Consulting as an implementation partner can access an additional journey. If you're interested in setting up a customized journey, reach out to your Oracle contact.

Access Your Journeys

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

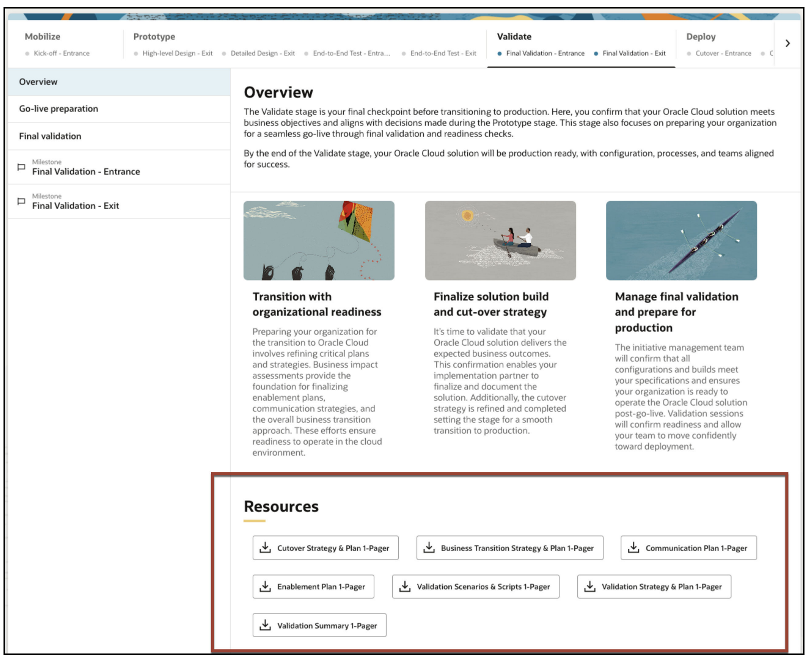
- To access journeys from the home page, select **Journey** in the Implement section.
- To access journeys from the menu, select **Cloud Journey**.

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.

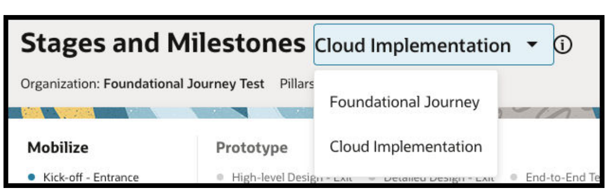
Download Resources in a Journey

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 Oracle is your implementation partner, you have access to two journeys: Foundational Journey and Cloud Implementation Journey. If you have access to more than one journey, the title of the journey includes a menu of those available to you.



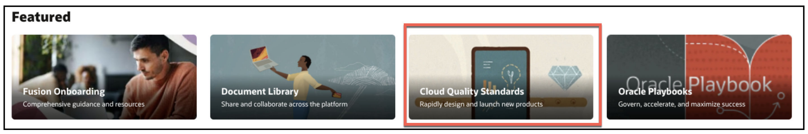
Cloud Quality Standards

Oracle Cloud Quality Standards (CQS) 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, CQS provides a blueprint for implementation that compliments a variety of implementation methodologies and toolsets, regardless of your implementation partner.

Accessing Cloud Quality Standards

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



On the Cloud Quality Standards page, select **Explore More** to view:

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

Oracle Modern Best Practice

Oracle Cloud Success Navigator provides quick access to Oracle Modern Best Practice (OMBP) business processes. OMBP illustrates common business processes optimized to take advantage of the latest in Oracle's applications and technologies. These business processes are embedded in the Starter Configurations that you can request and manage in Success Navigator. OMBP 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 Oracle Modern Best Practice business processes.

Use Success Navigator to explore OMBP to understand business process models, personas, use cases, leading practices, design decisions, and KPI through:

- Detailed business processes tailored to your Starter Configurations.
- Videos that help you understand Oracle Modern Best Practice as a whole.
- Videos that provide detailed training for OMBP business processes.
- Process diagrams.
- Downloadable resources that provide step-by-step details for Level 3 processes.
- Information about the personas, leading practices, and reporting available in your Starter Configuration.

- Country-specific use cases, Personas, and Leading Practices identified by the 2-character country code (e.g., US, IN, UK, etc.) depending on your selected countries.

Access Oracle Modern Best Practice

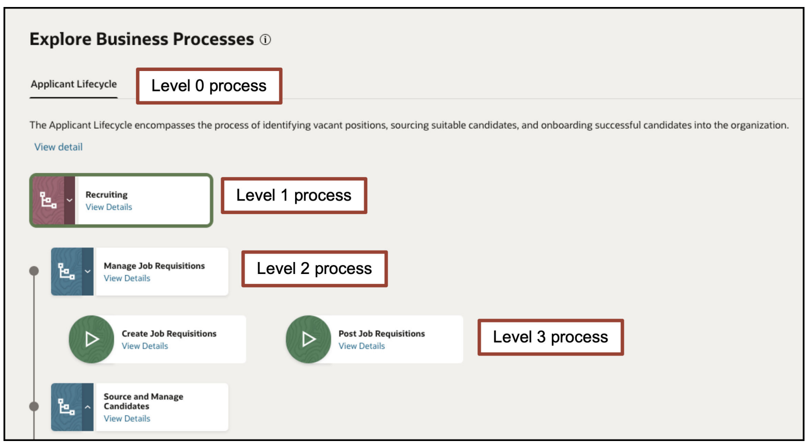
You can access Oracle Modern Best Practice from the home page or the menu.

- To access Oracle Modern Best Practice from the home page, select **Oracle Modern Best Practice** in the Implement section.
- To access Journeys from the menu, select **Oracle Modern Best Practice**.

Access OMBP Business Process Details

The business processes within Oracle Modern Best practice are categorized as:

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



To access process details

1. Access Oracle Modern Best Practice.
2. Select your Pillar and Country.

> **Note**
>
> Use cases, 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.

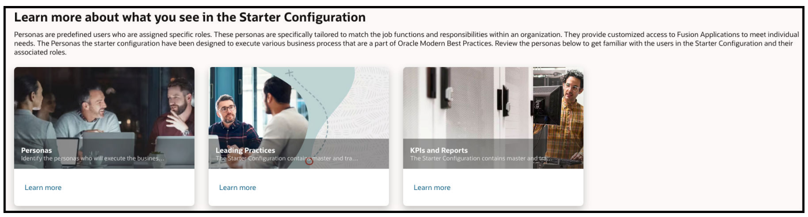
3. Scroll down to the Business processes section, and then select **View Details** for the OMBP you want to explore.
4. At the top of the page, view the process diagram and video for the high-level business process.
5. Select the Level 0 process if more than one are available.
6. Select **View Details** 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

Oracle Modern Best Practice includes important information about your Starter Configuration. To access the information, click Learn More on the related topic at the bottom of the Oracle Modern Best Practice page.

> **Note**
>
> US personas are displayed by default (as they are referenced in the training videos), followed by country-specific personas based on the number of countries the customer selected on the previous OMBP page.



Request and Access Starter Configuration

The Starter Configuration is a ready-to-use test environment that showcases how end-to-end business flows work in Oracle Cloud Applications, complete with predefined configurations, sample data, and user roles. You can request and access Starter Configurations in Oracle Cloud Success Navigator.

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 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.

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 is applicable only for fusion instances.

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.

Viewing Starter Configurations

View requested deployments, including the deployment status, from the Configuration section of the home page or on the Starter Configurations page. The Starter Configurations page displays all of the requested instances and instance details. Once deployed (indicated as **Deployed**), users with the Admin Access Level can access the environment and additional resources via the **Access** button.

To access the Starter Configurations page, on the home page, select ⋯ in the Configurations section, and then select **Manage Starter Configurations**.

Accessing a Deployed Starter Configuration

When your Starter Configuration is deployed and ready for use, you'll receive an email from Oracle Cloud Success Navigator. This email includes the default password for all of the persona users in the environment. Be sure to change the default password immediately after your initial login.

You can access your Starter Configuration environment and additional resources when the status is Deployed in Success Navigator.

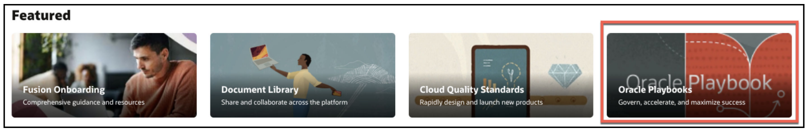
1. Go to the **Manage Starter Configurations** page. On the home page, select ⋯ in the Configurations section, and then select **Manage Starter Configurations**.
2. Select **Access** for any Starter Configuration has a **Deployed** status.
3. Review the following resources on the the Access window:
   - **Access your Starter Configuration**: This has two options to explore -
     – **Use Cases -** They will help you view the list of user names you can use to log in, along with the applicable use cases for each user.
     – **Starter Configuration Environment -** It gives you access to the Starter Configuration to explore, validate, and optimize configurations before implementation.
   - **OMBP and personas in Starter Configuration -** You can explore the personas and Oracle Modern Best Practice (OMBP) implemented in the Starter configuration, detailing key roles, and best practices.
   - **Get to know more about the Starter Configuration -** You can learn more about the Starter Configuration, the fictitious multinational organization Supremo Group modeled in the Starter Configuration, and how Oracle Guided Learning can help you understand the OMBP business processes.
4. When ready, select **Access Starter Environment**.

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. Oracle Cloud 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**.



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.

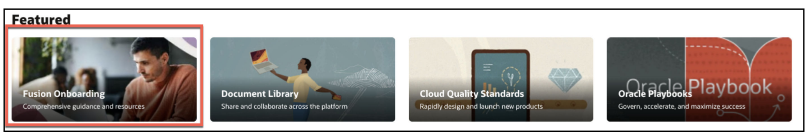
In Fusion Onboarding, you can:

- Explore important tasks and resources to begin your Oracle Cloud journey.
- Access learning paths to help you get started.
- Find links to support onboarding with Oracle Cloud Applications.
- Register with Oracle Cloud Customer Connect.

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 Featured area in the Implement section and select **Fusion Onboarding**.



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:

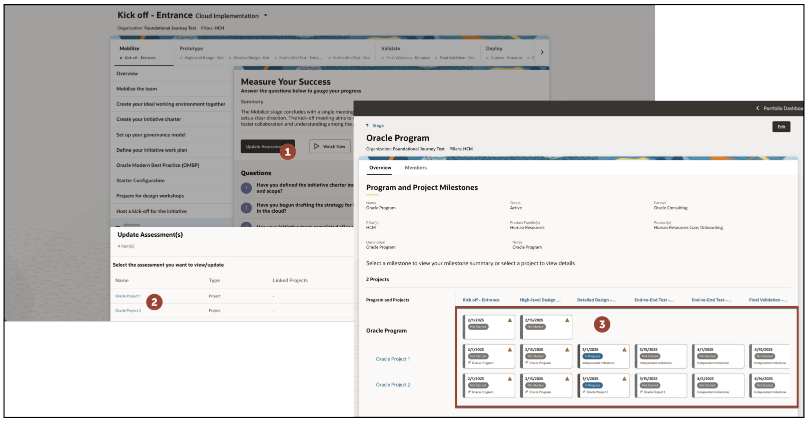
1. Start from the home or Programs page.
   - From the Programs section on the home page, select the program or project you're interested in.
   - On the Programs page, select the program or project you're interested in.
2. Select a milestone.

Update Assessments

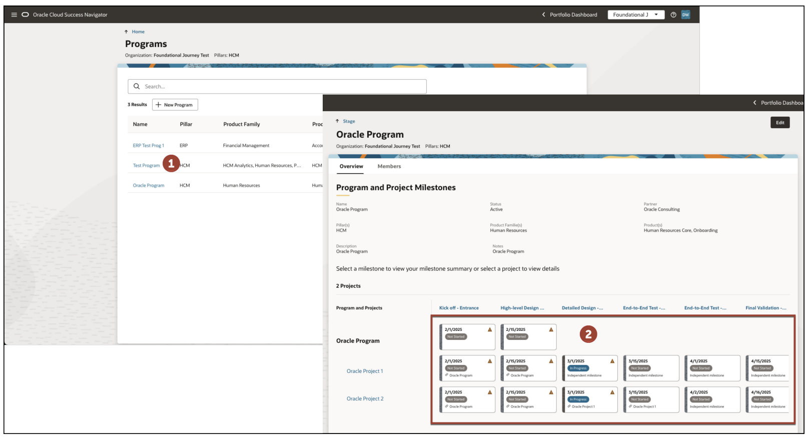
Admins and Team Members who are also part of the program or project team can update assessments to answer questions or add notes.

To update an assessment:

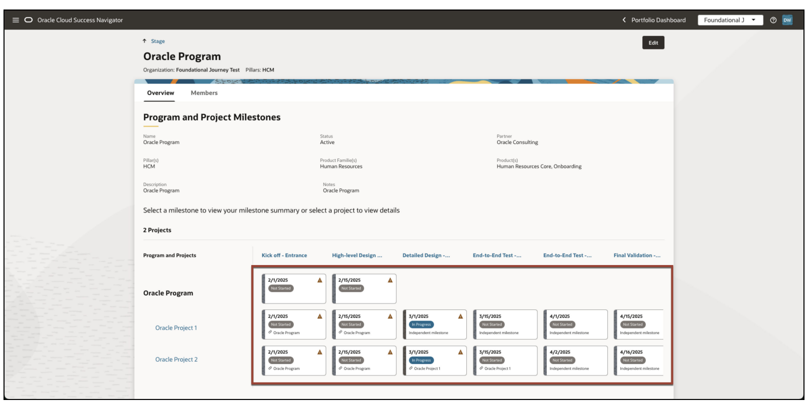
1. Start from the home or Programs page.
   - From the Journey, select a milestone, select **Update Assessment**, choose a program or project, and then select the milestone to update on the Program and Project Milestones page.



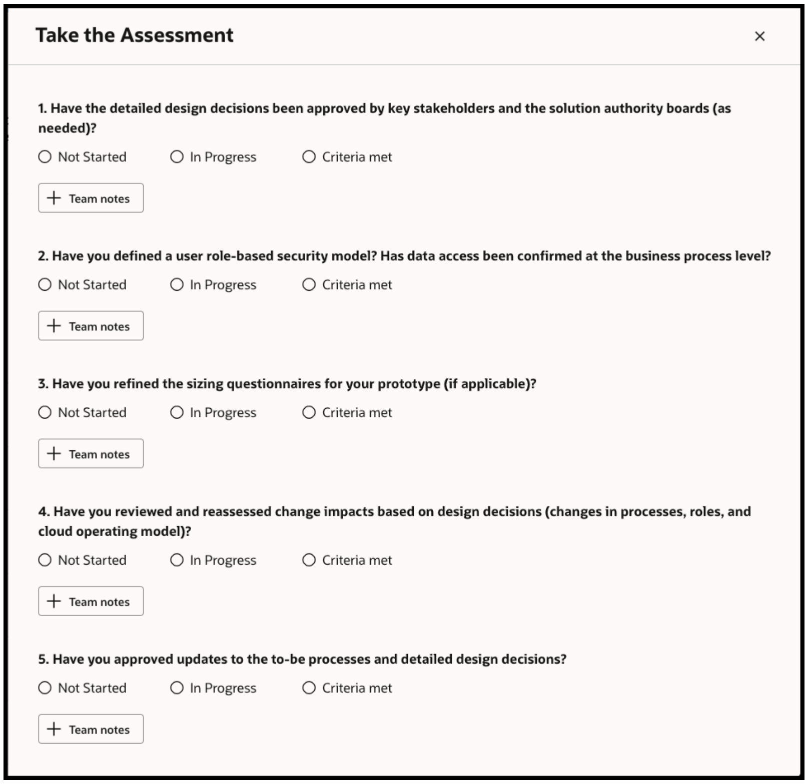
- On the Programs page, select the program or project you're interested in, and then select the milestone to update.



- 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.

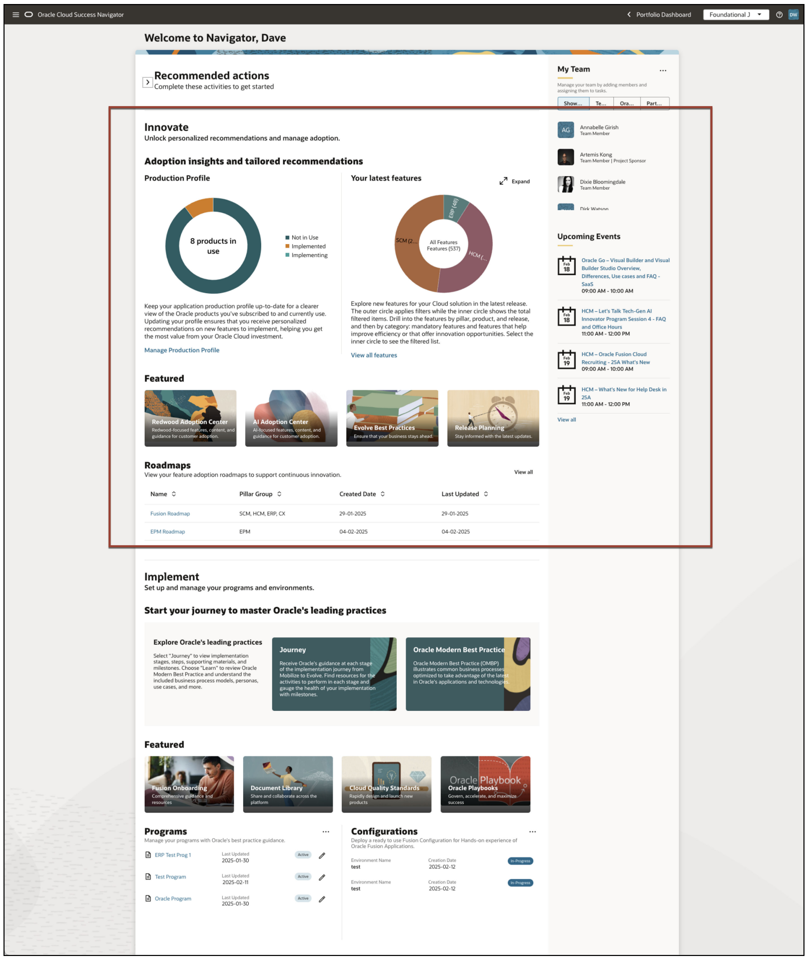


4. Select **Save and Close** when finished.

4

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

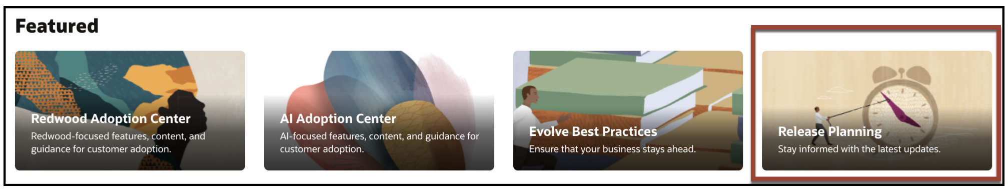
Release Planning

The Release Planning page in Oracle Cloud Success Navigator provides all the information you need to stay on top of the regular releases. The Release Planning page includes:

- Upcoming Releases—Find upcoming release events by cohort or select a date to see related events. You can also access information about pre-upgrade blackout dates.
- Fusion and EPM Release Cycles—Learn about the release schedule for Fusion and EPM products.
- Update Planning Strategy—Get access to recommended strategies for managing the release schedule and building your update plan.
- Access to upcoming features—Get access to the latest features where you can find detailed information, share the features, or add them to your roadmap. For more information, see Assess and Adopt Features.

Access Release Planning

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



Assess and Adopt Features

Use Oracle Cloud 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.

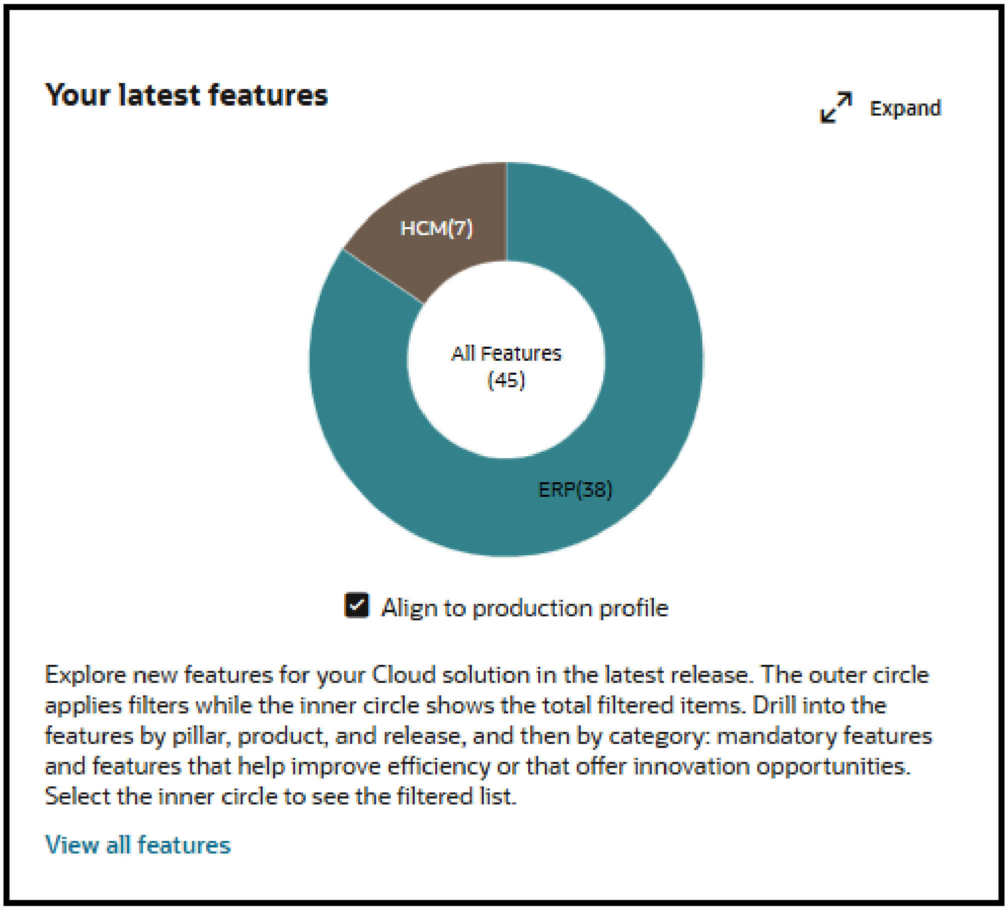
Feature Categories

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).

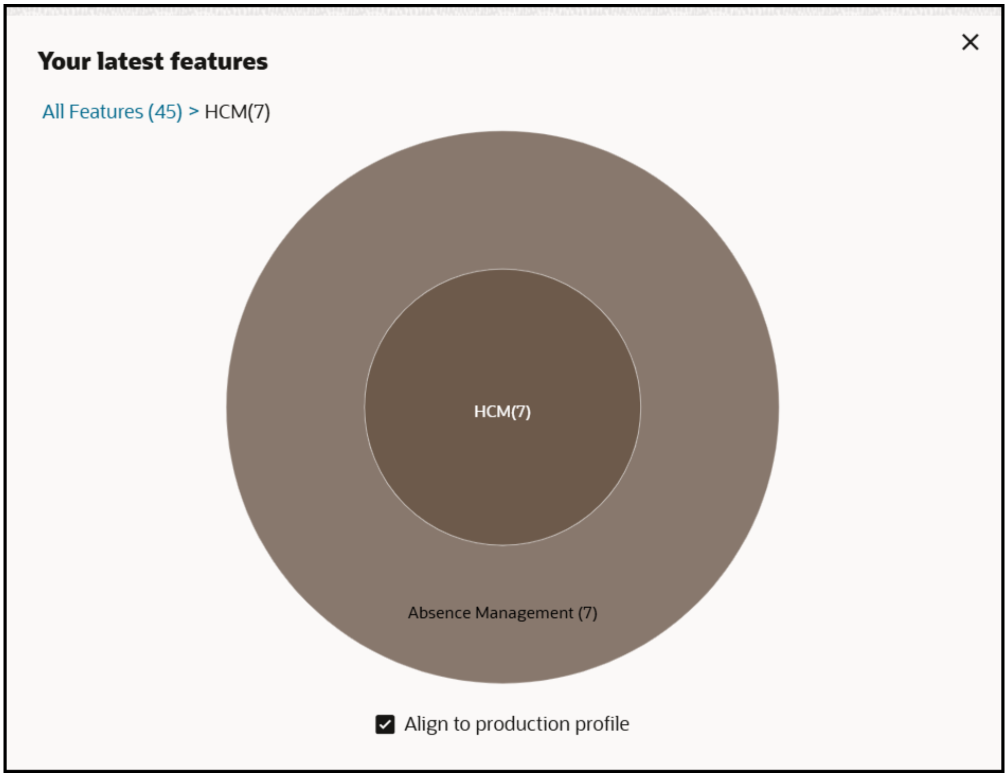


The colored outer portion of the circle defines the features in the inner circle. For example, the inner circle shows all features in the default view. If you select HCM, the inner circle shows all HCM features; then, when selecting Learning and Development, the inner circle shows all Learning and Development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

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.

Share Features

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 "Oracle Cloud 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.

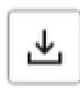
Add Features to Roadmaps

Roadmaps help you plan for feature adoption by organizing the features to show which 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 a feature to a roadmap 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 

Roadmaps

Roadmaps help you plan for feature adoption by organizing the features to show which you're adopting now, next, and later. Further organize your roadmap by adding adoption status to each feature: Completed, Not Implemented, In progress, and Deferred.

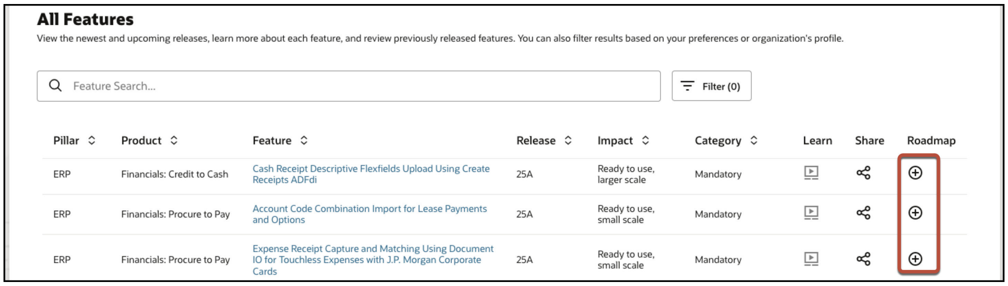
As you explore new features in Success Navigator, Admins and users with the Production Team Member Access Level can quickly add them to your roadmaps. When you add a feature, Success Navigator adds the feature a roadmap associated with the pillar. For example, features in CX, SCM, ERP, and HCM are added to the Fusion Roadmap while EPM features are added to the EPM roadmap.

Add Features to the Roadmap

As you assess features on the Feature Innovation page, users with Admin or Production can add them to the Roadmap. Find features on the Feature Innovation page or through the Adoption Centers. When you add features to the Roadmap, they're stored in the Saved Features section of the Roadmap.

To add features to a Roadmap, select in the Roadmap column of any features list. If a feature is already in a roadmap, the icon is gray and cannot be selected.

> **Note**
>
> Only Admins and users with the Production Team Member Access Level will see this column. Users without either Access Level will not see this column in the Feature list pages.



View and Manage Roadmaps

Manage your roadmaps by dragging features to different columns on the board, managing feature status, and removing features from the roadmap.

To view and manage Roadmaps:

1. On the home page, scroll to Roadmaps in the Innovate section, and then select the roadmap to update.
2. Update any of the following on the Roadmap page:
   - Categorize features: Drag feature tiles from the Saved Features to any other column.
   - Update feature implementation status: Select ... on the feature tile, and then select **Edit**. Select the appropriate status: Completed, Not Implemented, In Progress, and Deferred, and then select **Submit**.

     > **Note**
     >
     > Features marked Completed move to the Completed Features list on the right side of the Roadmap.

   - Remove features from the Roadmap: Select ... on the feature tile, and then select **Delete**.
   - Add comments.

To add a comment:

1. Go to the Roadmaps page.
2. Select a feature in the roadmap.
3. Select the ellipsis (----) next to the name of the feature.
4. Select **Comments** (Comments) from the list of options.
5. Write a comment in the **Add Comment** box.
6. Select **Submit**.

Filter Features from the Roadmaps

Team members can easily find the features that they are interested in by filtering them.

To filter a feature:

1. Select a Roadmap.
2. Select **Filter** (Filter (0)) and select the filter categories.
3. Select **Apply**.

View Feature Readiness Information

You can view the readiness information for any feature on the roadmap.

To view the feature information

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

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

Export Roadmaps

Export Roadmaps to spreadsheets as a CSV file.

To export Roadmaps:

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

Customize Roadmaps with Column Names.

Customize roadmaps by:

- Renaming the column labels - Team members can personalize the labels to align with their organization update strategy.
- Add Comments - Team members within the roadmap can add comments to promote more effective collaboration and increase transparency across the organization.

To rename a column:

1. Go to the Roadmaps page.
2. Select the name of the column you want to rename.
3. Select the ellipsis (...) next to the name of the column.
4. Select **Rename** and you can personalize the label.
5. Select **Submit**.

Adoption Centers

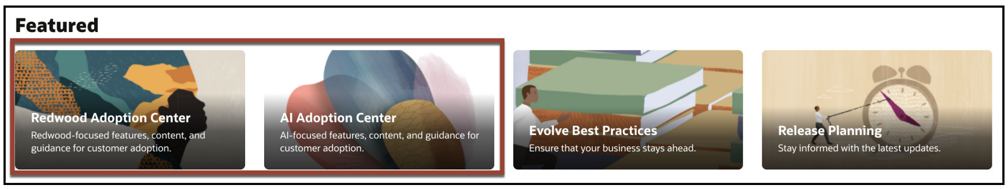
Adoption Centers provide a single source of videos, training, best practices, and recommendations to adopt innovative feature sets. In Oracle Cloud Success Navigator, you can access these Adoption Centers:

- AI Adoption Center
- Redwood Adoption Center

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.

AI Adoption Center

Using the information in the AI Adoption Center to adopt AI features can enhance automation, decision-making, and user experiences.

Highlights of the AI Adoption Center include:

- An introductory video where you can look at AI capabilities.

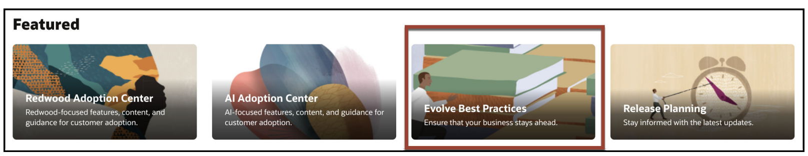
- Transition to AI—The four tabs in this section cover how your organization can adopt AI. Get product-specific details to help you understand AI, understand AI for Fusion applications, learn how to enable AI, and see how AI can work in OCI.
- Explore Curated AI Adoption Center Features—View a consolidated list of AI-specific features for each of the product tiles. Select a tile to view a features list with only AI features for the selected product. You can understand the impact of the AI features in the list, access learning, share feature content, and add features to your roadmap.
- Resources—The Resources section provides additional information and links to Oracle AI blogs, training, and documentation.

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**.



5 Manage Oracle Cloud Success Navigator

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

- My Team
- Programs and projects
- Production Profile
- My Documents
- Account Portfolio

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. 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:
  - Admin—Admins have full access to view and make updates in Success Navigator.
  - Member—Members have access to most areas of Success Navigator and can update assessments for programs and projects where they are team members.
  - Viewer—Viewers have view-only access.
  - Production Team Member—Production Team Members can view most areas of Success Navigator and can make updates to the Production Profile and Roadmaps.
- Programs 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

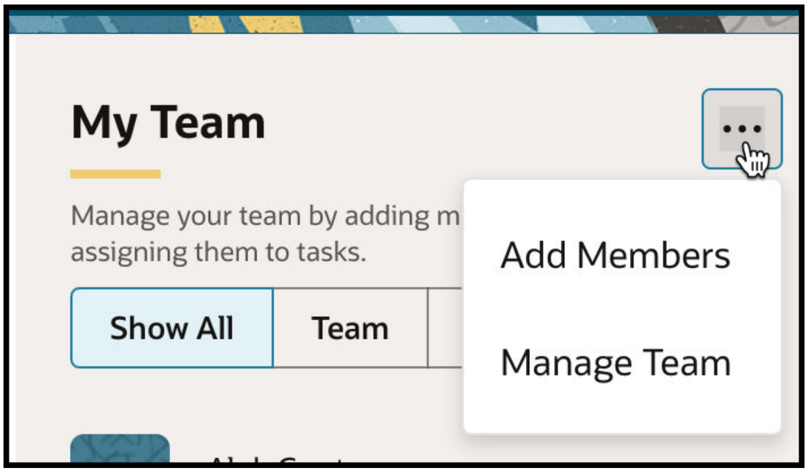
Members. Admins can only update programs and projects where they are Program Members or Project Members. Program Members are automatically added as Project Members for child projects, but they can be removed.

Add Team Members

Users with the Admin Access Level can add Team Members.

To add a Team Member:

1. Select **Add Members** from the home or Team Members page.
   - From the My Team section on the home page, select , and then select **Add Members**.

   - 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. Select the **Programs** and Projects, that a user should be a member of.
10. Enter optional comments.
11. 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**.
   - From the My Team section on the home page, 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 Oracle Cloud 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:

- Admin—Admins have full access to view and make updates in Success Navigator.
- Member—Members have access to most areas of Success Navigator and can update assessments for programs and projects where they are team members.
- Production Team Member—Production Team Members can view most areas of Success Navigator and can add features to roadmaps.
- 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.

This table shows the actions you can take in Success Navigator, along with the Access Level needed.

	Viewer	Production Team Member	Member	Admin
View the home page	x	x	x	x
View journeys	x	x	x	x
Update assessments			x Must be a member of the program or project.	x Must be a member of the program or project.
View programs and projects	x	x	x	x
Add and update programs				x
Add and edit projects				x
View Starter Configurations	x	x	x	x

Request Starter Configuration				x
View Team Members	x	x	x	x
Add an edit team members				x
View Production Profile	x	x	x	x
Edit Production Profile				x
View Oracle Modern Best Practice	x	x	x	x
View New Features	x	x	x	x
View Fusion Onboarding	x	x	x	x
View Adoption Centers	x	x	x	x
View My Documents	x	x	x	x
Upload My Documents			x	x
View Best Practices	x	x	x	x
View Release Planning	x	x	x	x
View Roadmaps	x	x	x	x
Add features to the roadmap		x		x
Update roadmaps		x		x
View Oracle Cloud Quality Standards	x	x	x	x
View Oracle Playbooks	x	x	x	x

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. 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.

     > **Note**
     >
     > All users see the Foundational Journey. Selecting Oracle Consulting will also give users with access to the program the Cloud Implementation Journey, which is specific to Oracle Consulting.

   - Pillar—Select one or more pillars.
   - Product Family—Select one or more product families from your pillar.
   - Product—Select one or more product.

   - Description—Enter a brief description of the program.
   - Notes—Enter optional notes about the program.
3. Expand **Program Members**, and then select all of the users who should be part of the program.

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

4. Select **Create**.
5. Continue to set the program's milestone dates.

Create Projects

To add a project:

1. Select **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.

     > **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.
   - 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. You can add project members, but cannot remove users associated with the program.

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

Manage Program and Project Milestone

Manage Program and Project Milestones

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 **Add Milestone** under the stage you want to configure.
2. 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.
3. Select **Update**.
4. When finished, select **Update**.

To edit timeframes:

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 Properties

Users with Admin access can edit programs if they are also Program Members. Possible updates you might make to a program include updating program members, changing the status, or updating a program's properties.

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. 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**.

Production Profile

The Production Profile is a snapshot of the products that you are implementing and have implemented. It provides insight into your product ecosystem, and you can use it to understand where to focus on features. Anyone can view the Production Profile, but only Admins can update it.

View the Production Profile

The home page provides a high-level view of your Production Profile: what you're implementing, what's in production, and what products in the Oracle applications you aren't using.

In the Production Profile, you can view details about the pillars, product families, and products that you're implementing or are in production. Admins of your organization appear on the left, while the right side shows Team Members with the Production Profile Member Access Level

To view Production Profile details:

1. On the home page, select **Manage Production Profile** in the Implement section.
2. Select **View More** on the Production Profile page.
3. Review the information on the Current Capabilities by Pillar page. Expand and collapse sections as needed.

Configure the Production Profile

Admins can set up your Production Profile and define the list of pillars, product families, and products you're implementing or are already in production.

To configure the Production Profile:

1. On the home page, select **Manage Production Profile** in the Implement section.
2. Select **Update Profile**.
3. In **Products Implemented**, select the Pillar, Product Family, and Products currently in your production Cloud applications.
4. In **Products Being Implemented**, select the Pillar, Product Family, and Products for current implementations.
5. Select **Submit**.

Edit the Production Profile

Admins can change the Production Profile and add or remove pillars, product families, and products.

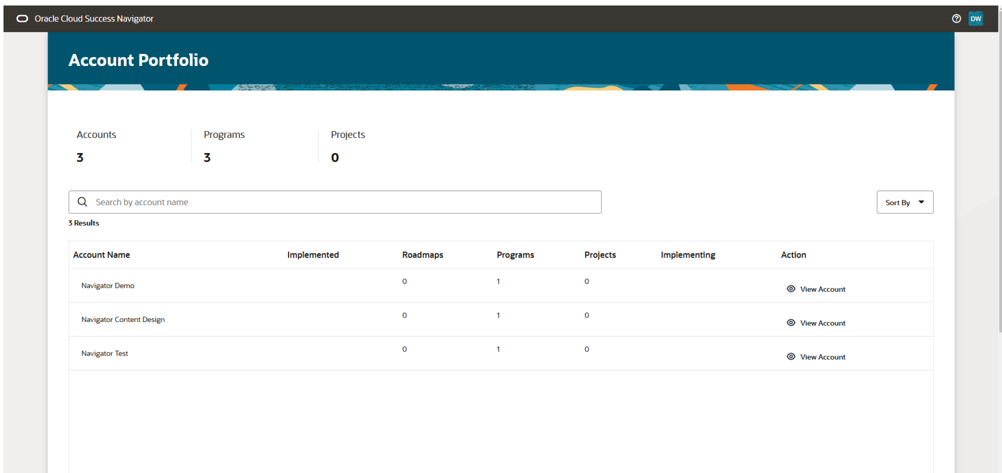
To edit the Production Profile:

1. On the home page, select **Manage Production Profile** in the Implement section.
2. Select in the upper corner of Production Overview.
3. In **Products Implemented**, select the Pillar, Product Family, and Products currently in your production Cloud applications.

4. In **Products Being Implemented**, select the Pillar, Product Family, and Products for current implementations.
5. Select **Submit**.

Account Portfolio

The Account Portfolio page is the home page for any Success Navigator user assigned to more than one account. It provides a summary of your accounts, programs, projects, and roadmaps.



This page shows key details for your accounts, including:

- The Oracle products that are implemented and which products the organization is currently implementing.
- The number of roadmaps, programs, and projects in each account.

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 5MB:

- PDF
- Excel: XLS and XLSX
- Word: DOC and DOCX
- TXT

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.

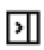
To update content:

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.

6 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.

Starter Configuration for August Release

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Request and Access Starter Configuration
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.	Request and Access Starter Configuration

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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	Request and Access Starter Configuration

Release Version 25.1.2

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
Multi-pillar and country Starter Configuration requests	Request and access personalized starter environments for multiple pillars and countries simultaneously, reducing setup time and complexity.	Request and Access Starter Configuration
Category added to Roadmap export	View features by category in the Roadmap export file.	Roadmaps
Request Starter Configurations for Sales and CPQ	Success Navigator support Starter Configuration requests for Oracle CX Sales and Oracle Configure, Price, Quote (CPQ).	Request and Access Starter Configuration
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.	Request and Access Starter Configuration
Default Starter Configuration persona passwords	Manage default passwords for Fusion Starter Configuration requests for provisioned user accounts.	Request and Access Starter Configuration

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Adoption Centers

Release version 25.1.1

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Assess and Adopt Features
AI Adoption Center Content Update	Review AI Studio Training, AI Governance, and Activate AI content and aligned OGL guides in the AI Adoption Center	Adoption Centers
Country Tags for OMBP	New OMBP country tags help you quickly identify localized use cases, leading practices, and personas..	Oracle Modern Best Practice

Release version: 25.1

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Get Started on the Home Page
Menu enables access to all functionality	Access features from the menu, simplifying navigation between pages.	Get Started on the Home Page

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Get Started on the Home Page
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.	Assess and Adopt Features
New filters for roadmaps and features	Quickly show a subset of features with enhanced new filters.	Roadmaps
Roadmaps customization	Customize roadmaps by adding comments and renaming columns.	Roadmaps
Upcoming Events	Search and filter events by date range, segmented by pillar to focus on relevant product events.	Assess and Adopt Features
Make T Minus date editable	Customize the T-minus timeframes for milestones to align with program and project plans.	Programs and Projects
Program and Projects Team Members	Simplify setup by adding users to programs or projects when adding team members to Success Navigator.	My Team
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.	My Team
Starter Configuration Access and Resources	Admin users can find streamlined access to Starter Configuration details and resources through a redesigned, user-friendly interface.	Request and Access Starter Configuration

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Journeys
Adoption Center features can appear in more than one Adoption Center	Features can also be categorized for more than one product.	Adoption Centers
Fusion Foundation Training in OMBPs	Access foundational Oracle Cloud application Oracle Modern Best Practice training within Success Navigator, centralizing guidance assets.	Oracle Modern Best Practice
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.	Request and Access Starter Configuration
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.	Request and Access Starter Configuration

Release version: 25A

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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	Get Started on the Home Page

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
	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.	

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Programs and Projects

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
Cloud Quality Standards	Success Navigator now includes Oracle Cloud Quality Standards (CQS). The Cloud Quality Standards 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.	Journeys
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.	Adoption Centers
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.	Assess and Adopt Features

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Roadmaps
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.	Evolve Best Practices
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.	Request and Access Starter Configuration
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.	Journeys
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.	Account Portfolio

FEATURE/ ENHANCEMENT	DESCRIPTION	RELATED TOPIC LINKS
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.	Production Profile
Oracle Playbooks	Success Navigator now includes Oracle Playbooks that describe strategies Oracle has used to grow revenue over the last 20 years. Find resources, training, and videos.	Oracle Playbooks
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.	Release Planning
EPM New Features	The Feature List pages (New Features and Adoption Center Features) includes EPM features.	Assess and Adopt Features
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.	Sign In to Oracle Cloud Success Navigator
New Access Level: Production Profile	We've added a new Access Level called Production Team Member. Users with this Access Level can manage Roadmaps.	Access Level Privileges

Release version: 1.3

FEATURE/ ENHANCEMENT	DESCRIPTIONS	RELATED TOPIC LINKS
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.	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.	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.	Manage Oracle Cloud Success Navigator

Release version: 1.2

FEATURE/ ENHANCEMENT	DESCRIPTIONS	RELATED TOPIC LINKS
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.	Implement
Terms and conditions	We've updated our terms and conditions.	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.	Manage Oracle Cloud Success Navigator

Release version: 1.1

FEATURE/ ENHANCEMENT	DESCRIPTIONS	RELATED TOPIC LINKS
Starter Configuration update	The Starter Configuration widget initially showed **No items to display,** but it has now been updated to **Add a starter configuration.**	Request and Access Start Configuration
Starter Configuration update	The label has been changed from **View My Configurations** to **View Starter Configuration.**	Request and Access Start Configuration

Glossary

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