

Switching to the News Feed Home Page Layout

Oracle CX Sales and B2B Service

We strongly recommend that you review the News Feed home page layout and switch to it as part of the next innovation cycle for your CX Sales and B2B Service application.

While switching to and configuring the News Feed home page is fairly straightforward, there are some best practices, tips and techniques that will help you quickly roll out this home page layout to your users.

We're here to guide and help you, so here's what we recommend.

There are several high-level approaches for this switch, listed from the simplest to the most thorough. A phased implementation of these would be very appropriate for many businesses, delivering quick wins wherever possible.

1. Quick, short term switch to a common News Feed home page for all users. This could be as quick as a week or two.
2. Role specific configuration, reflecting the unique requirements of different groups of users. In this case, users with different roles would see different navigational icons and infolets to use in their business processes. This would take a little longer, but still just a few short weeks.
3. Consideration of requirements specific to each unique user role for a more highly configured News Feed home page. This would be a natural expansion of your initial switch to the News Feed home page. It would take a little longer, in proportion with your company size and the complexity of your business processes. However, the focus is still on the contents of the News Feed home page as the starting points for your most common business processes.

As always, you'll need to decide what works best for your business, balancing speed of deployment against functional coverage and expected benefits.

For additional assistance, where applicable, consult with your Oracle Implementation Partner.

Now let's review these options for you, using a simple checklist approach to keep things organized.



Target audience

- Sales Administrator
- Application Administrator
- Project Manager
- Implementer

Resources for this feature

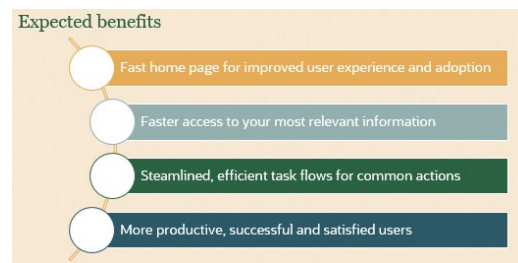
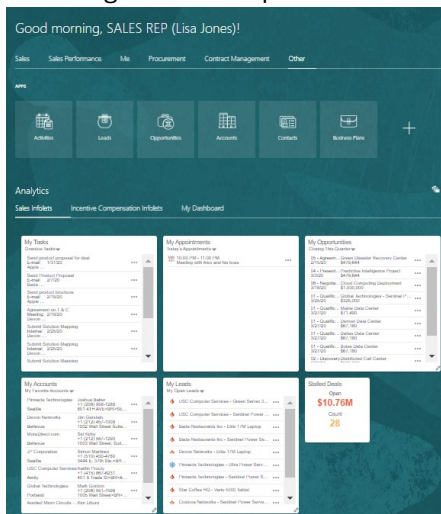
- [Introductory Video](#)
- [Do You Know document](#)
- [Configure the Navigator and Home Page](#)
- [Resource Centers](#)
- [Documentation and Training](#)

Connect with us

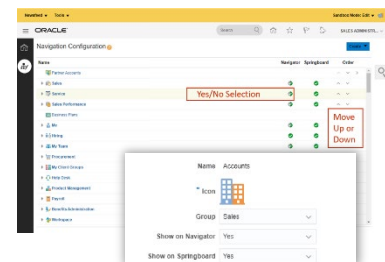
- [Customer Connect Sales Forum](#)

Switch to a common home page for all users

- Quickly socialize the News Feed home page layout and benefits, to confirm general interest and get leadership agreement for a short trial implementation.
 - Discuss the style and high level components of the News Feed home page. Ask:
 - “Would this work as the default starting point for our most common business processes?”
 - “Is this better than what we have today?”
 - “Can we make this work for all our users?”
 - “Is this a good time to update our theme, colors etc?”



- Include the fewest, most important items - you want this to be simple and easy to use.
- When working with themes and colors, take applicable usability guidelines into account, so pages are readable.
- Remember: When you choose the News Feed home page layout, it will be the default for ALL your users. You cannot have some users on News Feed and other users on Banner or Panel home page layouts.
- Gather high level requirements and reach agreement to implement a common home page for all users. Focus on what provides the most value for the most number of users. Remember: You're looking for a simple, common solution, so give weight to the needs of the many over the needs of the few.
- Use a Sandbox to quickly configure the News Feed home page layout. Demonstrate this with key business users, adapt for their feedback and get their approval.
 - Configuration will be primarily defining what items you want to expose, in what groupings and in what order. Remember, with this option your decisions need to work for all users.
 - Decide what icons and infolets you need.
 - Decide how you want to group into tabs.
 - Decide the order for displaying tabs.
 - Decide the order for displaying items within the tabs.



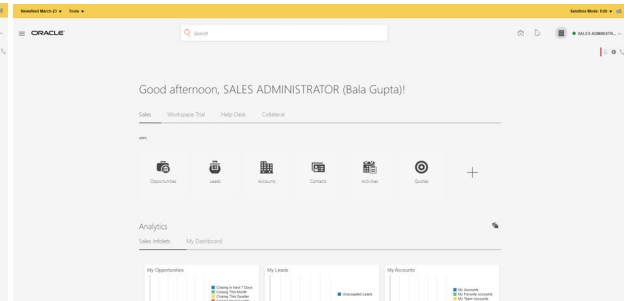
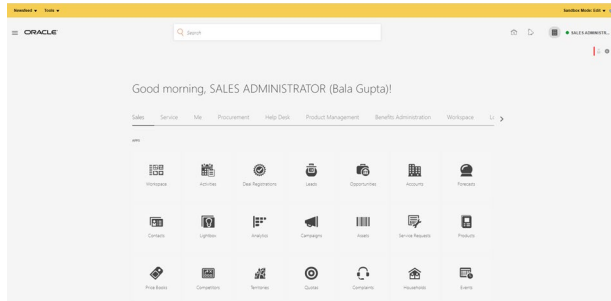
- Show options and have the user community make their choice on a final design. Start with a limited number of tabs, icons and Infolets, then add back only what is determined to be essential. The tools are simple and prototyping is very applicable.

For example, which would be best for you users?



Option A?

Option B?



Our recommendation is to keep the number of items per tab to a minimum. Avoid mixing items that are used every day with those that are used less frequently. This would be Option B.

- Remove any unnecessary sections of the News Feed home page like Announcements and Items to Finish sections. This will free up screen space.
- Have your first Analytics tab be your Actionable Infolets.
- Decide if you want your users to be able to personalize their actionable infolets. If so, set the ZBS_ENABLE_ACTIONABLE_INFOLET_PERSONALIZATION profile option to “YES.”
- Switch to the News Feed home page layout in production and monitor user feedback. If you have good acceptance, plan for and prioritize additional refinements. Only if necessary, you can revert back to your previous home page layout.

Essential Resources:

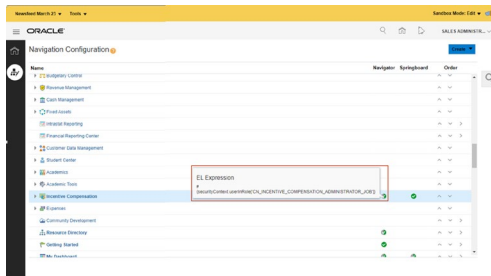
[Configure the Navigator and Home Page](#) in the Getting Started with Your Sales Implementation guide. Make sure you watch the short embedded videos in the documentation – you will find them very helpful.

[Actionable Infolet](#) section of Implementing Sales guide.

[Actionable Infolets](#) feature kit video and companion documents.

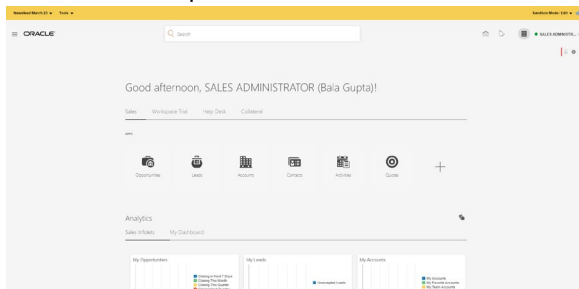
Role specific configuration, reflecting the unique requirements of different groups of users

- Follow the same steps as a short term switch to a common home page for all users.
- Expand requirements to consider the unique needs of different user roles. For instance, some may need access to more types of data than other, and some may perform different actions against the data than others.
- Implement role based visibility to tabs, icons and infolets using simple Expression Language (EL) conditions.

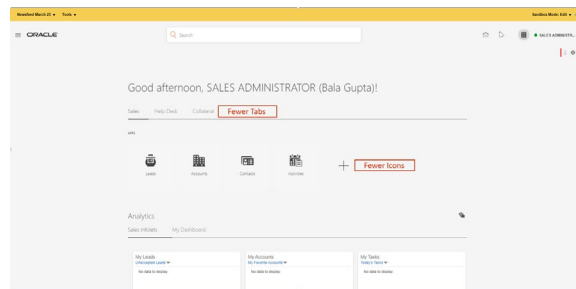


As an example:

- Role 1 – Sales Rep



- Role 2 – Lead Qualifier



Remember: Although you can make tabs and items visible to specific roles, the order of the tabs and order of the items within them will be common to all users.

Essential Resources:

[Configure the Navigator and Home Page](#) in the Getting Started with Your Sales Implementation guide. Make sure you watch the short embedded videos in the documentation – you will find them very helpful.

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Consider requirements specific to each unique user role for a highly configured News Feed home page

- Follow the same steps outlined in the previous options.
- Investigate requirements at more granular levels for different user roles.
- Expand your use of Actional Infolets to include custom infolets and custom actions.

Essential Resources:

[Actionable Infolets](#) feature kit video and companion documents.

[Actionable Infolet section of Implementing Sales guide.](#)

[Oracle CX Sales Creating and Administering Analytics](#)

FAQS:

When did the News Feed Home Page Layout become available?

The News Feed home page layout was first introduced back in Update 18B, so early 2018. It has been successfully used by many customers.

Why provide best practices for switching to the News Feed Home Page Layout now?

The News Feed home page layout is not the default layout type, though it will be in a future version. Many existing customers have not realized how valuable it is and are missing the opportunity to leverage it as a key component of their CX Sales and B2B Service application. The purpose of this documentation is to make you fully aware of the News Feed home page layout, so you can take advantage of it.

TECHNICAL ASSISTANCE:

Please contact [Oracle Support](#) if you require technical assistance.



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