

## Tip #1: Know Your Destination

The first step in planning your path to Fusion is to assess whether the Fusion solution is the destination you want to reach.

### SO, WHAT IS THIS “DESTINATION” THAT ORACLE CALLS FUSION?

Oracle Fusion is two solutions: a technology stack (middleware) and a business application suite (software):

**Oracle Fusion Middleware (OFM)** consists of several software products from Oracle Corporation. OFM spans multiple services, including Java EE and developer tools, integration services, business intelligence, collaboration, and content management. OFM depends on open standards such as BPEL, SOAP, XML and JMS.

Fusion Middleware provides software for the development, deployment, and management of service-oriented architecture. It includes what Oracle calls “hot-pluggable” architecture, designed to facilitate integration with existing applications and systems from other software vendors such as IBM, Microsoft, and SAP. Oracle Fusion Middleware 11g is the only middleware available from any vendor that offers the following unique design principles:

- **Complete** – Work with a single, strategic partner for all middleware requirements
- **Integrated** – Certified integrations with Oracle Fusion Middleware, Oracle Database, and Oracle Applications provide confidence and reduce costs
- **Hot-Pluggable** – Enhance your existing infrastructure and applications with interoperability that goes beyond industry standards
- **Best-of-Breed** – Choose from best-of-breed offerings across every product line

**Oracle Fusion Applications** is a software product completely architected from the ground up on Oracle Fusion middleware, with a service-oriented architecture, allowing it to interoperate with existing Oracle applications as well as competitor applications and even custom systems, as long as they adhere to open standards. Fusion applications also incorporate role-based design, embedded analytics, and unified communications features, such as chat. However, initial Fusion releases will not be a comprehensive successor for Oracle’s existing products. According to Oracle, when Fusion first reaches general availability in late 2010, it will only address the following horizontal functions:

- Financial Management
- Governance, Risk, and Compliance
- Procurement
- Supply Chain Management
- Human Capital Management
- Customer Relationship Management
- Project Portfolio Management

## Tip #2: Prep for the Journey

Once you've determined that Fusion is the right destination for your organization, it's time to prepare for the journey. Successfully executing an upgrade project requires project planning. There are several upgrade best practices that will help ensure you arrive at your final destination.

**Keep Current with your Application Release** – Because Fusion Applications are built upon the Fusion middleware, it is important to implement a JD Edwards application and tools release that is fully compatible with Fusion. This ensures upgrade scripts, programs, and tools to Fusion Applications are readily available. EnterpriseOne 9.0 is the first EnterpriseOne release to be fully integrating, so achieving this release level enables an efficient upgrade path to the Fusion Application suite.

**Inventory Your JD Edwards Assets** – Take a snapshot of which JD Edwards assets are in your production environment today. The two most critical assets for you to inventory are Customizations (interfaces, processes, and business flows) and Data (transaction, historical, and master). Best practice dictates that any upgrade or migration is the best time to execute a data cleanse and purge exercise; this is particularly so when preparing for Fusion.

**Assess your Customization Strategy** – Once you've inventoried your customizations, assess whether each will be required by the targeted release level. This will streamline your upgrade path and ensure you have the latest system capabilities at the new release level. Assess how standards-based Fusion middleware tools and analytics can simplify the procedure for extending standardized functions in a manner that doesn't inhibit future upgrades.

## Tip #3: Begin with the End in Mind

Each organization must review its unique situation to determine which upgrade strategy is best for their circumstance. Although the JD Edwards product suite's future is more predictable, JD Edwards customers still have several strategic concerns.

- Is Fusion (middleware and applications) the answer to my business needs?
- What are my options?
- Should I act now or can I wait?
- Which path and platform will be best for my organization and situation?
- How much effort and investment will be involved in taking that path?

Spinnaker's Upgrade Roadmap is a process for evaluating the impact of upgrading JD Edwards software. Creating the Roadmap is a crucial step in determining if a company should upgrade. The journey's first stop is the Assessment – the foundational mapping activity. The goal is a thorough assessment of the project environment and objectives that empowers you with the knowledge to make an informed decision on whether to proceed on the upgrade journey.



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