

Exploring Upgrade Strategies to Oracle Fusion Applications

An Oracle Product Strategy White Paper
October 2005

NOTE:

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Exploring Upgrade Strategies to Oracle Fusion Applications

INTRODUCTION

Oracle has embarked on building its next generation applications, known as Oracle Fusion Applications. Our design goals are to incorporate the best capabilities from all of the Oracle independent products lines: PeopleSoft Enterprise, JD Edwards EnterpriseOne, JD Edwards World and Oracle E-Business Suite.

In doing so, Oracle will provide strategies to facilitate upgrades from each product line to the common Oracle Fusion Application destination. As one of the focus areas of Oracle's Superior Ownership Experience initiative, the upgrade process is being considered early on in Project Fusion to ensure a solution that will encompass critical customer needs. In this early paper, these strategies will be laid out.

In addition, Oracle is establishing a Fusion Upgrade Customer Council. In this council, Oracle will listen to our customer's interests, understand their priorities, share our plans, and use this interaction to create and refine our plan of action.

Oracle possesses a long history of helping customers through technology changes, from character-based computing all the way through today's internet based products. Examples include:

- The PeopleSoft Enterprise upgrade from version 7.5 products to version 8 products enabled customers to move from a client server architecture to a pure internet architecture.
- JD Edwards customers who moved from World to EnterpriseOne were able to embrace a new client server based architecture in place of their existing host-centric one.
- The E-Business Suite upgrade from 10.7 SC (SmartClient) to 10.7 NCA (network-computing architecture) represents another example of supporting customers through architecture changes.

While each of Oracle's application product lines includes specific strengths and tools for upgrading, the goals of the upgrade are the same: preserve customer investment, and aggregate the tools and information necessary for complete project success.

Upgrades to Fusion applications will share these goals. Oracle's primary strategy is to provide an automated upgrade process from the existing product lines to Fusion applications for specific releases. The following currently available releases are included:

- PeopleSoft Enterprise 8.8 and 8.9
- JD Edwards EnterpriseOne 8.11

This paper will discuss how Oracle is planning a strategy to help customers upgrade to Oracle Fusion Applications, leveraging existing upgrade capabilities, incorporating customer input, and preserving customer investment.

- JD Edwards World A7.3 and A8.1
- E-Business Suite 11i10

This paper will discuss Oracle’s strategy to help customers upgrade to Oracle Fusion Applications, leveraging existing upgrade capabilities, incorporating customer input and preserving customer investment.

Customer implementations of Enterprise, EnterpriseOne, World and E-Business Suite contain several types of information that detail how customers run their business.

Preserve Customer Investment

Customer implementations of Enterprise, EnterpriseOne, World and E-Business Suites contain several types of information that detail how the customer runs their business. The strategy for upgrades to Fusion applications is to preserve this investment, and to bring this information forward into the common Fusion application destination. There are three types of information Oracle is focused on: data, reports and stand-alone applications.

Preserving Customer Data

Oracle is considering all data. For example:

Data Type	Enterprise Examples	EnterpriseOne / World Examples	E-Business Suite Examples
Transactional	Journal entries, invoices, payroll records		
Operational	Employee, customer, supplier records		
System	Security records	User preferences	User profiles
Configuration	Profile options	Business unit options	Processing options, constants

The goal is to convert all these types of data from each source to the common target. This will replace the need to redefine data which can be moved directly to Fusion applications, and will allow upgrade projects to enter the testing and refining phase faster, rather than having to re-implement their business practices.

Oracle has been providing successful data transformation as part of the upgrade process over many application release cycles. In addition, Oracle possesses powerful data transformation technologies, proven in the marketplace. Leveraging these technologies and intimate knowledge of our existing products, we are working on the strategy to bring this data forward into the new applications.

Preserving Reports

Common to every customer is an investment in reporting. Customers have invested in reports using the Enterprise, EnterpriseOne, World and E-Business Suite toolsets, as well as third party tools. These capabilities enable key business processes, including interfaces and partner solutions. Oracle is researching how those reports may be brought forward into the next platform. Toward that end,

internal projects are being started to determine both technical feasibility, and how complete conversion of the code would be.

Preserving Stand-alone Applications

Many customers have also invested in stand-alone, or bolt-on, applications. These are applications written to satisfy unique requirements that are not met by the base application. Stand-alone applications are designed to work with minimal integration to the base applications themselves. Due to this consideration, it may be possible to convert stand-alone capabilities to the next generation Fusion application platform. As with reports, Oracle is engaging in research projects to determine if an investment in automated conversion technology would create significant customer value by bringing these applications to the new platform.

Please note, stand-alone applications represent an upgrade opportunity because they are separate from the base applications that will be delivered from Project Fusion. Customizations that are tightly integrated into current base applications may no longer be needed; as Fusion application functionality and the new architecture may render them obsolete. Examples of these types of customizations include Enterprise Pages or EnterpriseOne Business Functions. Some of the comparison tools mentioned below can be helpful in determining if any tightly integrated customizations are needed with Fusion Applications.

While data and code conversion remain critical to success, there are a number of additional upgrade tasks that represent opportunities for Oracle to further help customers.

Enable Complete Upgrade Success

Historically, Oracle focused on the upgrade of data and code as the core components of the upgrade process. While these elements remain critical to success, there are a number of additional upgrade tasks that represent opportunities for Oracle to further help customers. These other capabilities are in various stages of research and requirements gathering and include the ability to compare business processes, identify new features and benefits, audit readiness, test the upgraded implementation, and document the final configuration.

Compare Business Processes

Early in the evaluation of an upgrade to Fusion applications, customers will need to familiarize themselves with the capabilities in the new system and ensure that they are upgrading to a set of applications that will enable them to fully run their business. This process will help them identify and understand any major difference in the flow of the business processes, as well as how terminology has changed and evolved from their Enterprise, EnterpriseOne, World and/or E-Business Suite implementation. Oracle will provide tools to facilitate fit/gap analysis, and help the customer plan for a complete solution once they complete the upgrade project.

Identify New Features and Benefits

In addition to comparing business processes, customers will want to understand what features and functionality are available in the new Fusion applications that

were not available to them in their existing product line. Oracle is working on a common way to present this information that will take into account the specific application(s) that the customer is upgrading from. The information will be paired with short statements about the value created by these features, to help customers identify areas that may benefit their companies and therefore require further investigation.

Audit Readiness

Customers will use several strategies to ensure they are ready for a successful upgrade once they have begun the project. Automated checking of both the existing and new applications to ensure success, whether prior to a practice test, or the final conversion, will help eliminate common configuration issues, which can cause the conversion to fail. This tool will increase the efficiency of the upgrade, and help prevent the upgrade project team from spending time troubleshooting known issues. Validations may include configuration details such as patch levels, third party software requirements, hardware requirements, and similar parameters. In addition, customers will do one or more practice conversion to be sure that the conversation of data for their go live, typically do not over a weekend, will be successful.

Test the Resulting Configuration

Once the upgrade has been executed, customers will validate the configuration to be sure that the upgrade was successful, and to prepare to go live on the new applications. Often, this is a manual effort, which requires that employees step away from their normal responsibilities, and test the processes they typically use in the new system. To decrease the amount of time that employees must work on the new system, Oracle is researching a base set of test cases that will help validate the core configuration, and an automated way to run them against the customer's upgraded Fusion applications.

Document the Configuration

After a successful upgrade, the project team typically has a responsibility to document the final configuration. This records how the system is configured after it has been accepted for go live, and may also include information about key decisions that were made. The documentation is subsequently used by internal employees as well as third party consultants in troubleshooting issues, changing the configuration and extending the solution. Oracle is investigating an automated way to generate documentation that describes the key configuration parameters, along with a way for the project team to document why certain choices were made, to speed up this documentation process. The capability will also provide consistency in documentation, lowering the learning curve for new employees or consultants to understand how the customer's applications are set up.

The primary goals of the upgrade are to preserve existing customer investment, and to enable success of complete upgrade projects to Fusion applications.

CONCLUSION

Oracle's tradition of helping customers adopt and embrace new technologies is a long and successful one. Planning for the upgrade from PeopleSoft Enterprise, JD Edwards EnterpriseOne, JD Edwards World and Oracle E-Business Suite to Fusion applications has already started to ensure this trend continues. The primary goals of this effort are to preserve existing customer investments and to enable the success of complete upgrade projects to Fusion applications.



Exploring Upgrade Strategies to Oracle Fusion Applications White Paper
October 2005
Author: Dan Stern

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

Copyright © 2005, Oracle. All rights reserved.

This document is provided for information purposes only and the contents hereof are subject to change without notice.

This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission. Oracle, JD Edwards, and PeopleSoft, are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.