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ORACLE FUSION RESOURCE

Oracle Fusion Health Check Checklist

Evaluate, Optimize, and Modernize Your Oracle Fusion Environment

A practical framework for assessing functional processes, technical architecture, reporting, security, integrations, and future readiness.

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Getting Started

Introduction




Organizations often focus on implementation but overlook optimization after go-live. An Oracle Fusion environment is not a finished project — it is a continuously evolving platform that benefits from periodic review.

This checklist helps you evaluate the key areas of an Oracle Fusion environment and identify opportunities for continuous improvement across functional processes, technical architecture, integrations, reporting, release readiness, and future transformation.

How to Use This Checklist

Work through each section and review your current state. Mark each item, then use the Health Scorecard near the end to summarize the overall health of your environment and prioritize areas that may require attention.

Scoring Guide

| | | |
|--|---|---|
|  Complete Operating well |  Needs Review Monitor / improve |  Requires Attention High priority |
|--|---|---|

SECTION 1

Functional Processes**Financial Operations**

- Month-end close process efficiency
- Approval workflows functioning properly
- Open support backlog reviewed
- Segregation of duties validated
- User adoption challenges identified

Procurement

- Approval hierarchy reviewed
- Supplier processes optimized
- Exceptions monitored

HCM

- Employee self-service adoption
- Role assignments reviewed
- Workflow efficiency validated

SECTION 2

Technical Architecture**Scheduled Processes**

- Critical jobs monitored
- Performance issues reviewed
- Failed jobs investigated

Security

- Roles and privileges reviewed
- Access controls validated
- Audit requirements satisfied

Environment Management

- Non-production environments maintained
- Migration procedures documented
- Backup and recovery processes reviewed

SECTION 3

OIC Integration Health

- Interfaces documented
- Error handling processes established
- Monitoring and alerts configured
- Integration performance reviewed
- API dependencies identified
- Exception management procedures documented

SECTION 4

Reporting & Analytics**OTBI**

- Critical reports identified
- KPI dashboards reviewed
- Data quality issues addressed

BI Publisher

- Reports documented
- Performance reviewed
- Distribution schedules validated

Executive Reporting

- Business metrics defined
- Manual reporting minimized
- Dashboard usability improved

SECTION 5

Quarterly Patch Readiness

- Release notes reviewed
- Impact assessment completed
- Regression testing process established
- Critical business scenarios tested
- Stakeholder sign-off process defined
- Production deployment checklist documented

SECTION 6

Redwood UX Readiness

- Current user experience evaluated
- VBS customizations documented
- Legacy pages identified
- User training strategy defined
- Change management approach established
- Adoption plan prepared

SECTION 7

AI Readiness Opportunities

- Manual processes identified
- Reporting bottlenecks documented
- Knowledge management gaps evaluated
- Productivity improvement opportunities identified
- Workflow automation opportunities assessed
- AI governance requirements reviewed

Summary

Health Scorecard

Summarize each area below to capture the overall health of your Oracle Fusion environment.

| Category | Excellent | Good | Needs Attention | High Priority |
|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Functional Processes | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Technical Architecture | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Integrations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reporting & Analytics | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Redwood Readiness | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| AI Readiness | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Overall Environment Health | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Where to Go From Here

Next Steps

Organizations that periodically assess their Oracle Fusion environment are better positioned to improve efficiency, reduce support issues, and prepare for future transformation initiatives.

Use the results of this checklist to prioritize the areas marked as **Needs Attention** or **High Priority**, and build a focused improvement roadmap across functional, technical, integration, reporting, release-readiness, Redwood, and AI workstreams.

Tip: Re-run this health check each quarter — ideally aligned with Oracle’s quarterly update cycle — to track progress over time and catch new issues early.



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LET'S TALK

Need help evaluating your Oracle Fusion environment?

Schedule a complimentary consultation with Redwood Axis. We help organizations modernize, integrate, and optimize their Oracle Fusion environments — from managed support and integrations to Redwood UX and practical AI adoption.

[Schedule a Free Consultation](#)

www.redwoodaxis.com

Modernize. Integrate. Optimize.