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Doing a baseline assessment (aka, internal audit) of Oracle software.

Below is a very condensed version of a recent blog post. For the full post, head over to www.redwoodcompliance.com/pro-tip-blog/.

Without a clear picture of your use of Oracle software and your entitlement of Oracle licenses, you have two things to worry about:

- **Being non-compliant.** Your usage of Oracle software may be in excess of what you are entitled to use. Aside from violating your contractual obligations, you may be putting yourself in a position of unplanned financial exposure should an audit be performed by Oracle and you be found to out of compliance, requiring you to buy more licenses and/or pay back-usage fees.

- **Over-spending on Oracle software.** Purchasing excess licenses and paying annual support for the surplus licenses can be very expensive and a hidden drain on your IT budget. Knowing exactly what your team needs and actually uses can be crucial in helping reduce this spend.

Ideally, you will want to be at the sweet spot – that is, have enough licenses to meet your needs plus a cushion for any anticipated growth, with little or no shelf ware. This sweet spot cannot be achieved without a methodically performed internal assessment of your Oracle licensing. Call it what you want – a baseline assessment or internal audit – the goal is to have a clear picture of your Oracle licensing situation with any shortages and/or surpluses clearly identified.

The basics of an internal assessment are as follows:
1. Gather and analyze all of your Oracle contracts. Review them for key terms and stipulations, including limited and restricted use terms, as well as entity coverage details. Also make note of Matching Support Level and matching metrics definitions.
2. Assess and quantify your license entitlement for each Oracle program. This can be complicated if you have mixed metrics and legacy products and metrics.
3. Assess and quantify your use of Oracle software. This is the tricky bit.
   a. Firstly, remember that Oracle requires you to license any processor where Oracle software is "installed and/or running". This is wide open to interpretation by Oracle and incorrect interpretation by inexperienced customers.
   b. Performing an assessment using Oracle's methodology and approach is important. Your tools/scripts should pick up the same data points that Oracle auditors would in the event of an audit.
4. Reconcile your entitlement to usage. This step is more complicated and requires in-depth understanding of Oracle licensing and contracts.
5. Identify licensing gaps and surpluses and perform value assessments to identify the best options for resolution and optimization.