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**ORACLE®**

**SOFTWARE  
INVESTMENT  
GUIDE**

Next ▶

## Welcome

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Welcome and thank you for the opportunity to share Oracle's pricing and licensing policies.

Some of you may ask, why now? It's simple really; software pricing and licensing strategies now more than ever are an important aspect of managing today's business environment. Shifting market conditions and shortening business cycles seem to be the norm, no longer the exception.

As your company faces these changing markets and an always-growing number of new technology options, we understand that optimizing your software investment can appear to be a daunting task. We are committed to you, and we want you to be successful. To help you achieve this goal, we have developed this *Software Investment Guide*. The purpose of the guide is to help you optimize your software investment by enhancing your understanding of Oracle's licensing and pricing practices. We believe that by sharing our expertise, we empower you to better manage your Oracle licenses, and to make more informed software investment decisions on the whole.

### How was the Software Investment Guide Developed?

We spent a lot of time listening to our customers, our partners and working with industry experts. Here's what you told us: you want simple, flexible, and transparent pricing and licensing policies that help you manage your business more efficiently. You also told us what your challenges have been: managing software investments across a broad set of constituents (including departments, lines of businesses, and subsidiaries); understanding the range of licensing policies offered by various vendors; and navigating the uncertainties associated with a fluid economy coupled with an ever-changing IT industry.

As the world's largest enterprise software vendor, Oracle is assuming a leadership role in providing you, our customers, with the flexible and transparent pricing and licensing policies you desire. To that end, our Software Investment Guide will facilitate better planning, managing, and optimizing of your Oracle investment.

**Thank you. We appreciate your business.**

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## How to Use this Guide

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Given that we have over 275,000 customers and have hundreds of products on multiple platforms, the number of possible software configurations is vast. How you deploy software within a given hardware environment and who you allow to access that software will be key factors in determining your total licensing costs. This guide represents our most current pricing and licensing practices and is designed to facilitate your understanding of our pricing models.

We provide a detailed overview on how to license all Oracle products, from the Oracle database platform and application server to all Oracle enterprise applications, which includes Oracle E-Business Suite, Siebel, Peoplesoft, and JD Edwards. Nine easy-to-read sections enable you to find the topics that interest you most. Within every section, each specific topic has hyperlinks and toll free numbers that enable you to get more information on the subject matter. Additionally, we've included illustrations to enhance your understanding of our pricing practices related to data environments, batch processing, and more. Pricing information on Oracle services, such as Support, Outsourcing, Consulting, and Education is also here.

This guide is your key source for Oracle licensing information. For exact terms and conditions, which govern your usage, please consult your specific Oracle license agreement. To purchase licenses, please contact your Oracle sales representative, authorized Oracle Reseller, or go to the Oracle Store to buy online.

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## Key Questions Savvy Buyers Ask

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While businesses may buy many of the same software applications, their needs and objectives can be very different. As you consider the choices of software available to you, you will no doubt have questions. The next several questions are ones that you should carefully consider before you make your software investment. The answers that we provide are designed to guide your software evaluation process. The remainder of this guide provides detailed information on Oracle's pricing and licensing practices, which will help answer the questions identified here.

### **What business need does the software address?**

Companies require software to address many business demands and it is critical for you to understand why your company is making this investment. The first step in the process is to determine what business needs the software is helping you solve.

For example, imagine your company sells an average of 60,000 exercise DVDs a day by taking orders through your call center. You just received a telecom report that indicated that the company is experiencing 20,000 dropped calls per day due to capacity issues. Additionally, an internal analysis has generated a report with a demand forecast of 120,000 DVD units per day. Based on USD \$15.00 net profit per DVD, you realize that you're missing out on a revenue opportunity equal to \$900,000 per day. Short of building another call center, hiring more personnel to staff it and purchasing the necessary technology infrastructure to support it, you consider your other options. You realize you have two opportunities to sell more DVDs. The first is increasing the efficiency of your order management process. Previously, you had not invested in this area and have very limited automated processes. You determine that an order management software product will increase a customer service representative's order taking efficiency by 25% per day. You also determine that if you had a website that enabled customers to purchase your DVDs online, you could capture the overflow orders not taken through the call center. You realize these improvements will also keep your competitors at bay, while making it easy for customers to buy from you.

**Your business objective:** Facilitate your company's ability to take more orders per day and generate more revenue.

**What functions do the products we are buying perform, and does this functionality address our required business objectives?**

This is a simple question, but one that is not asked often enough. Based on the example above, if you were to purchase an order management software program without also buying a web store application, your business problem would only be partially solved. The efficiencies gained with order management would not mitigate the entire call center overflow issue. Therefore, without enabling online purchasing in addition to order management, you would lose the opportunity to capitalize on the forecasted demand opportunity.

**How much software do we need to purchase now?**

Now that you've decided to buy Oracle software, your next key decision is to determine how many licenses you will need to purchase. A rule of thumb is to review an average of three years of data before making this decision. For example, if you're licensing a product that is priced by named users, you'll want to determine the average number of persons in the service department who would use the software. Assume the number of people in Year 1 is 200, in Year 2 is 300, and in Year 3 is 275. This would mean your three-year average is 259 users. This gives you a baseline to start, but should be regarded more as a minimum. For the past 2 years, your usage has been between 275 and 300 people, and therefore purchasing licenses for 259 users would leave you under-licensed. While it's not a good idea to purchase more software than you need, you do need to buy enough. Make sure you do an adequate assessment of your company's usage requirements.

**What are the software provider's support policies and how does that affect our current and future licenses?**

Typically, when a customer thinks about support, they think about receiving technical guidance from someone over the phone. They want to know, how and when may I contact the vendor, and what level of support can I expect to receive?

The second issue people ask about is when an update of their software purchase is released, will they receive this newest version? By paying for update rights now, what will they get in the future? Today, many supported customers expect to get future versions of the products they originally licensed. For example, supported Oracle7 Database customers received updates for Oracle8, Oracle8i, Oracle9i and now Oracle10g.

Finally, people ask what happens if a product they bought licenses for is bundled

with another product. This can happen for many reasons, including product release efficiencies and other business process efficiencies. Typically, for customers who have purchased perpetual licenses and are current on their support agreement, their license grant is maintained.

For example, in June 2000, Oracle Forms Server was bundled into the Enterprise Edition of Oracle9iAS. Supported customers of Forms Server were given restricted use licenses of Oracle9iAS Enterprise Edition. For customers who want to upgrade to the full functionality of Oracle9iAS Enterprise Edition, Oracle provides an easy migration path. See the Leveraging Your Oracle Investment section for more details.

**Who is responsible for understanding our license set and managing to it?**

No one can overstate the importance of designating an individual or group who will be responsible for understanding your license agreement and managing to it. The number one compliance issue is over-deployment. This occurs when users who are not licensed for the software are using it. Naturally, Oracle expects customers to acquire licenses for all use of programs. When software is over-deployed, it is difficult for all parties involved. By developing a software management tracking process, most over-deployment situations can be avoided.



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# Licensing Overview

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## Sections

Software License Agreement

Rights Granted

Term vs. Perpetual License

License Metrics

Minimums

Shipment

## **Software License Agreement**

A software license agreement is a contract between a software company and the user of that software. The software license grants the user specific rights to use the software in particular ways. It also allows a developer or a publisher to continue to own the software. This retained ownership is very important because it allows the developer or publisher to control the future development of the software, and to ensure that the software meets its quality control standards on an ongoing basis.

A license can be granted in many different ways. In the software industry, the most common ways of granting licenses are through a written and signed agreement or via a written shrinkwrap or clickwrap agreement, in which the user indicates acceptance of the rights and limitations in the license by opening the software package or clicking a button on a computer screen.

Oracle uses a combination of written agreements to license its software. The overarching license rights are described in the Oracle License and Services Agreement (OLSA), and the rights regarding specific products and services are described in the Ordering Document. Specifically, the OLSA is the agreement that details the standard rights granted, ownership, restrictions, warranties, disclaimers, confidentialities, etc., as it relates to all Oracle products and services. The Ordering Document describes the specific products, types of licenses, number of users, level of support, and discounts (if any), a customer has ordered and will receive. When you sign or otherwise accept your Ordering Document, you are indicating your acceptance of the license terms in the OLSA as well as the Ordering Document.

The Oracle Store uses a “clickable” version of the OLSA and Ordering Document. (For older Oracle customers who have signed Software License and Services Agreements, SLSAs, with Oracle, the SLSA serves the same function as the OLSA).

### **Rights Granted**

Oracle License and Services Agreements and Ordering Documents grant customers specific rights to use Oracle software and receive any services the customer has ordered, and customers’ rights are limited to those rights that are expressly granted. All other rights in the programs are reserved by Oracle.

### **Perpetual vs. Term License**

Oracle offers both term and perpetual licenses for all its products. A perpetual license is a one-time license fee that allows continued use of the software program for as long as the customer complies with all terms of the license agreement.

A term license is for a specific, limited period of time, during which the user is allowed to access and use the software. At the end of the term, the user must stop using the software or extend the term or purchase new licenses through an agreement with the software vendor. Oracle offers annual term licenses for all its products in 1-year, 2-year, 3-year, 4-year or 5-year terms. Term licenses are a percentage of the perpetual license of a given Oracle product, and the term length (i.e., 1 to 5 years) a customer chooses, determines the percentage amount.

### **License Metrics**

License metrics are selected carefully to reflect the functionality the product offers and the value the customer receives from utilizing that functionality. Essentially, a license metric determines how the software usage is being measured when Oracle licenses a product to a customer.

An example of a common license metric, which is used for Oracle’s enterprise applications, is an “Application User,” which is defined as “an individual authorized by Customer to use the applicable licensed application programs which are installed on a single server or on multiple servers regardless of whether the individual is actively using the programs at any given time. If a customer purchases licenses for a program licensed on an Application User basis, then they will need to purchase licenses for every person in the organization that requires access to the application.

As user requirements evolve and software functionalities advance, new license

metrics may be created and old ones obsoleted to meet these changes. The license metrics that are relevant to your configuration will be included and defined in your Ordering Document, and will remain in effect for the license granted in the Ordering Document throughout the term of that license.

### Minimums

Minimums are used in conjunction with license metrics and refer to the minimum number of licenses a customer is required to purchase when licensing Oracle products. Oracle often uses license minimums to establish base values for our products, so minimums vary by product and license metric. For example, the minimum number of “Processor” licenses required when licensing Oracle Database Enterprise Edition is one, while the minimum number of “Employee” licenses required when licensing Oracle Human Resources is 100. Please note, for all Oracle products, customers are required to obtain licenses based on their actual software usage or Oracle’s licensing minimums, whichever is greater.

### Shipment

To facilitate shipping and minimize the number of CDs a customer has to track and manage, Oracle includes many different software products in a single CD Pack. Customers may fully use only those programs for which they are specifically licensed. Receipt of the CD does not constitute an authorization to use any unlicensed products. However, the OLSA includes a provision that allows customers to use programs for which they have not purchased licenses on a 30-day limited trial basis.

# Technology Products

## Sections

Overview

License Metrics

Licensing Policies

## Overview

Oracle segments its product portfolio into two categories: technology products and applications. This section describes Oracle's technology offerings, which include the following sample categories (for a complete listing of products and categories, please see the price list(s) at [http://www.oracle.com/corporate\\_pricing/pricelists.html](http://www.oracle.com/corporate_pricing/pricelists.html)): Database, Enterprise Managers, Application and System Management, Application Server, Business Intelligence, Identity Management, Tools, Enterprise 2.0, Collaboration, Data Warehousing Products and Integration products.

Category	Description
Database	<p>This first category includes five distinct editions of the Oracle database, each suitable for different development and deployment scenarios. These five editions are: Enterprise Edition, Standard Edition, Standard Edition One, Lite and Personal Edition. In addition, Oracle offers Database options that enhance the capabilities of its Oracle Database Enterprise Edition for specific application environments.</p> <p><i>Enterprise Edition</i></p> <p>The Oracle Database Enterprise Edition offers industry-leading scalability and reliability in both clustered and single system configurations.</p> <p><i>Standard Edition</i></p> <p>Oracle Database Standard Edition offers a low cost alternative for small/medium business or departmental applications that want the power of Oracle. Oracle Database Standard Edition can only be licensed on servers that have a maximum capacity of 4 sockets. If licensing by Named User Plus, the minimum is 5 Named User Plus licenses. Effective with the release of 10g, the Oracle Database Standard Edition product includes the Real Applications Clusters database option. The Real Applications Clusters option is not included with any Standard Edition versions prior to 10g. Customers who obtain Oracle's Software Updates License &amp; Support for the Standard Edition Database can upgrade to the 10g version of the product for the supported licenses. Also, Customers must use Oracle Cluster Ready Services as the clusterware; third party clusterware is not supported, AND Customers must use Automatic Storage Management to manage all data.</p>

Category	Description
Database (continued)	<p><i>Standard Edition One</i></p> <p>Oracle Standard Edition One provides companies the total power of Oracle Database at an affordable entry price. Oracle Standard Edition One may only be licensed on servers that have a maximum capacity of 2 sockets. If licensing by Named User Plus, the minimum is 5 Named User Plus licenses.</p> <p><i>Lite Mobile Server and Lite Client</i></p> <p>Oracle Lite is the leading platform to develop, deploy and manage mobile applications that store data locally on mobile devices (smart phones, PDAs, handheld computers, and traditional laptops) and synchronize data with central servers.</p> <p><i>Personal Edition</i></p> <p>Oracle Database Personal Edition is a full-featured version of the Oracle Database targeted at individuals who require full compatibility with the entire Oracle Database family. Personal Edition provides a maximum of one Named User Plus per database.</p>
Enterprise Managers	Oracle Enterprise Manager provides a comprehensive management framework designed to support multiple, heterogeneous environments.
Application Server	Oracle Application Server runs e-commerce storefronts and personalized portals, reducing middleware complexity by replacing more than ten separate point products from other vendors. The Application Server comes in seven editions: iAS Standard Edition One, , iAS Standard Edition, iAS TopLink and Application Development Framework, Enterprise Edition, WebLogic Server Standard Edition, WebLogic Server Enterprise Edition, and WebLogic Suite.
Business Intelligence	Oracle Business Intelligence (BI) is the most comprehensive portfolio of technology and applications for enabling the insight-driven organization, including leading BI applications, BI platform technology, and data warehousing.
Identity Management	Oracle Identity Management's best-in-class suite of idM solutions delivers the industry's only hot-pluggable middleware, allowing enterprises to manage end-to-end lifecycle of user identities across all enterprise resources both within and beyond the firewall.
Tools	Oracle offers a complete suite of application development and business intelligence tools for building any kind of e-business application using the latest internet technologies.
Collaboration	Oracle Beehive supplies email, voice mail, calendaring, file services, and integrated search capabilities along with the ability to access this information from any type of interface (standard desktop clients, file protocols, Web, wireless, and telephone).

Category	Description
Data Warehousing	Oracle offers a complete, integrated, and open solution for all your data warehousing needs to design, build, deploy, and manage an Intelligent Webhouse. Oracle's data warehousing technologies take full advantage of the Oracle Database.
Integration Products	Oracle's Integration Products enable you to integrate your legacy data and applications into your Oracle environment.

### License Metrics

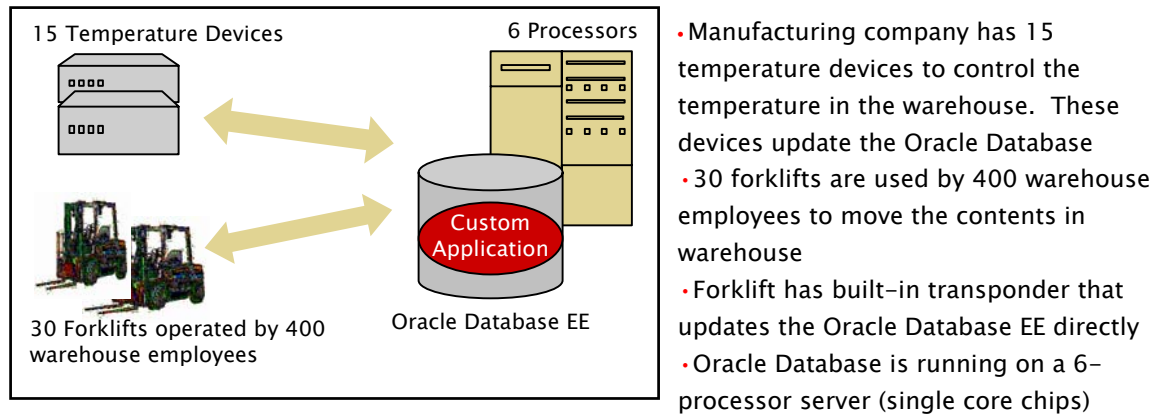
Oracle's technology products are primarily licensed using two metrics: Named User Plus or Processor. The Named User Plus metric is used in environments where users and/or devices can be easily identified and counted. The Processor metric is used in environments where users cannot be easily identified and counted.

### Named User Plus Metric

This metric is used in environments where users can be identified and counted. Named User Plus includes both humans and non-human operated devices. All human users and non-human operated devices that are accessing the program must be licensed. A non-human operated device can be many things, such as, a temperature monitoring device. It is important to note that if the device is operated by a person, then this person must be licensed. As described in illustration #1, the 400 employees who are operating the 30 forklifts must be licensed because the forklift is not a "non-human operated device".

A licensed Named User Plus may access the program on any instances where it is deployed, provided that the minimum on each server is met.

Illustration #1: Licensing Technology Products



Products to be licensed	Number of licenses required
Oracle Database EE	<p>This product can be licensed by Processor or by Named User Plus metric.</p> <ul style="list-style-type: none"> <li>• By Processor: all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➤ Number of Processor licenses required: <b>6</b></li> </ul> </li> <li>• By Named User Plus: the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of temperature devices + warehouse employees), whichever is greater.                             <ul style="list-style-type: none"> <li>1) 25 * 6 Processors = 150 Named Users Plus</li> <li>2) 15 temperature devices + 400 warehouse employees = 415 Named Users Plus</li> <li>➤ Number of Named User Plus licenses required: <b>415</b></li> </ul> </li> </ul>

If multiplexing hardware or software is used, the number of Named User Plus licenses must be counted at the multiplexing front end. Multiplexing is described later in this section.

Minimums for this metric may be discrete quantities, or they may be based on the number of processors in the machine on which the software will be installed and/or run. For example, the minimum for the Database Enterprise Edition, the iAS Standard Edition and the iAS Enterprise Edition is 25, 10 and 10 Named Users Plus per Processor, respectively, while the Database Standard Edition, and Standard Edition One minimums are 5 Named Users Plus. For iAS SE One/SE/EE, the Named User Plus Minimum does not apply if the program is installed on a one processor machine that allows for a maximum of one user per program.

**Reminder:** Oracle Database Standard Edition only can be licensed on servers that have a maximum capacity of 4 sockets. Effective with the release of 10g, the Oracle Database Standard Edition product includes the Real Applications Clusters database option. The Real Applications Clusters option is not included with any Standard Edition versions prior to 10g. Customers who obtain Oracle's Software Updates License & Support for the Standard Edition Database can upgrade to the 10g version of the product for the supported licenses. Also, customers must use Oracle Cluster Ready Services as the clusterware; third party clusterware is not supported, AND customers must use Automatic Storage Management to manage all data. Oracle Standard Edition One may only be licensed on servers that have a maximum capacity of 2 sockets.

### Processor Metric

This metric is mostly used in environments where the software users cannot be easily identified or counted, such as internet-based applications. The Processor metric is also used when it is more cost effective than Named User Plus licenses. All processors where the Oracle programs are installed and/or running must be licensed.

The number of required licenses shall be determined by multiplying the total number of cores of the processor by a core processor licensing factor specified on the Oracle Processor Core Factor Table which can be accessed at <http://oracle.com/contracts>. All cores on all multicore chips for each licensed program are to be aggregated before multiplying by the appropriate core processor licensing factor and all fractions of a number are to be rounded up to the next whole number. When licensing Oracle programs with Standard Edition One or Standard Edition in the product name, a processor is counted equivalent to an occupied socket; however, in the case of multi-chip modules, each chip in the multi-chip module is counted as one occupied socket.

For example, a multicore chip based server with an Oracle Processor Core Factor of 0.25 installed and/or running the program (other than Standard Edition One programs or Standard Edition programs) on 6 cores would require 2 processor licenses (6 multiplied by a core processor licensing factor of .25 equals 1.50, which is then rounded up to the next whole number, which is 2). As another example, a multicore server for a hardware platform not specified in the Oracle Processor Core Factor Table installed and/or running the program on 10 cores would require 10 processor licenses (10 multiplied by a core processor licensing factor of 1.0 for 'All



other multicore chips' equals 10).

## Licensing Policies

Due to their functionality, some licensing policies are specific to technology products.

### Sections

Prerequisites Rules

Environments to License

Backup/Failover/Standby/Remote Mirroring

Partitioning Servers

Batching and Multiplexing

## Prerequisites Rules

Many software products have functional interdependencies with other software products. Sometimes prerequisite products may be made by the same company that makes the primary product, and sometimes it is provided by other vendors. A simple example of this type of functional interdependency is the relationship between a word processing software program and an operating system. Before the word processing software can be used, an operating system must be installed on the hardware as well. Prerequisite products are frequently sold separately.

Many Oracle products have functional interdependencies with other Oracle products. In some cases, prerequisite products are sold separately. In others, where the functional interdependency is more limited, customers automatically receive a free, restricted use license for a prerequisite product or products to facilitate the use of the product they are licensing.

## Environments to License

Software is always used in combination with some type of hardware and operating system. In today's world, software is often used in combination with many different types of hardware and operating systems, which may be connected together in a complex network. Oracle's software is developed based on open standards that allow it to be installed and used on servers, computers, and devices made by multiple manufacturers and running many operating systems.

The term "configuration" is used to describe the combination of hardware, software, and licensed users and devices that an individual customer has or wants to run. For example, one possible (and very basic) configuration would be 160 Named User Plus of Oracle Database Enterprise Edition running on a Sun Solaris server.

Use of any Oracle software product requires a license from Oracle. In order to maximize the value you receive from your Oracle software, you will want to be sure you are licensed to use it in different environments, such as development, test, production and standby. See illustration #2.

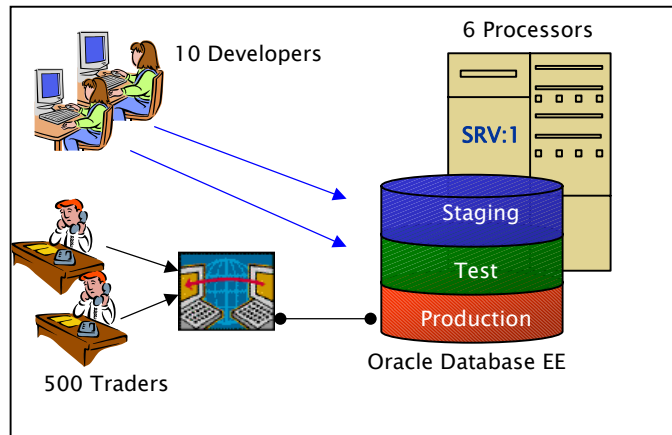
*Development* – Set up, customization, and modification of software is done in a development environment. Any person doing development work using the software must be licensed. Oracle software may be downloaded for limited development work via the Oracle Technology Network (OTN). Software downloaded from the OTN Website is governed by a special agreement called the OTN Development License. This agreement grants the individual the right to use the programs only in a development environment; licenses obtained under this agreement may not be used in test, production, fail-over, or any other environments. Additionally, customers who want to use any applications developed under an OTN license for internal data processing, commercial or production purposes must secure a Full Use Oracle license for any of the development software licensed under the OTN agreement **prior** to using the applications for such purposes.

Customers wanting a less restrictive license for development work may obtain Full Use licenses under a standard Oracle License and Services Agreement (OLSA) from the Oracle Store (<http://www.oracle.com/store>) or through their Oracle Sales Representative.

*Test/Staging* – Test/staging environments are used to verify that new or customized code runs properly. This can be staged on separate servers or on the same servers used to run a development or production environment. Any Oracle software used in test/staging environment must be properly licensed with a Full Use license under an Oracle License and Services Agreement (OLSA) or other appropriate Oracle (or Oracle authorized reseller) license agreement. If a test/staging environment is maintained on the same server as a production or development environment, and that server is fully licensed for all relevant programs on a per Processor metric, then no additional licenses are required for the test/staging environment.

*Production* – The environment used by end users for business or other operations is called a production environment. All programs used in the production environment must be properly licensed based on the applicable license metrics under an Oracle License and Services Agreement (OLSA) or other appropriate Oracle (or Oracle authorized reseller) license agreement.

Illustration #2: Multiple Environments on one Server



- Staging, test and production environments are installed and running on a server, which has 6 processors
- 10 Developers are working on the staging, test and production environments
- 500 Traders are using the Web site that resides on the production environment

Products to be licensed	Number of licenses required
Oracle Database EE (Test, Staging & Production)	<p>This product can be licensed by Processor or by Named User Plus metric:</p> <ul style="list-style-type: none"> <li>• If licensing by Processor, all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➢ Number of Processor licenses required: <b>6</b></li> </ul> </li> <li>• If licensing by Named User, the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of traders + developers), whichever is greater:                             <ol style="list-style-type: none"> <li>1) 25 * 6 Processors = 150 Named Users Plus</li> <li>2) 500 traders + 10 Developers = 510 Named Users Plus                                     <ul style="list-style-type: none"> <li>➢ Number of Named User Plus licenses required: <b>510</b></li> </ul> </li> </ol> </li> </ul> <p><b>Note :</b> If the server is fully licensed by Processor then no additional licenses are required to install and/or run other environments that are configured on the same server.</p>

*Backup/Failover/Standby/Remote Mirroring* – Described below, Oracle differentiates between four methods of database recovery:

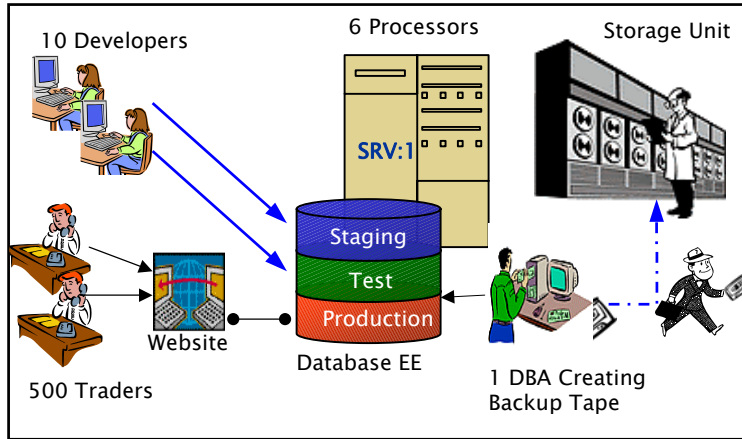
*Backup* – In this method, a copy of the physical database structures of the database is made. When the original data is lost, the backup files can be used to reconstruct the lost information that constitutes the Oracle Database. This backup copy includes important parts of the physical structures such as control files, redo logs and data files. These physical files can be stored on a server, storage array, disk drive(s), or Compact Disc(s). Solutions like Recovery Manager/RMAN (included with Oracle Database EE or SE) and Oracle Secure Backup or operating system utilities are used to create copies of physical files. Oracle permits customers to store a back up copy of the database physical files on storage devices, such as tapes, without purchasing additional licenses. In an event of failure, when the Oracle data is restored from tape or media, and the Oracle Database is installed on the recovery server, licensing is required. See illustration #3.

*Failover* – In this type of recovery, nodes are arranged in a cluster and share one disk array. A Failover cluster is a group of systems, bound together into a common resource pool. In this type of recovery method, the Production node acts as the primary node. When the primary node fails, one of the surviving nodes in the cluster acts as the primary node. Solutions like Oracle Failsafe (included with Oracle Database EE or SE, SE1), or third party vendor solutions (e.g. Veritas, HP Service Guard, HACMP, Linux HA – Heartbeat) are used to manage Failover environments. In this type of environment, Oracle permits licensed Oracle customers to run some Technology Programs on an unlicensed spare computer for up to a total of ten separate days in any given calendar year. Once the primary node is repaired, you must switch back to the primary node. Once the failover period has exceeded ten days, the failover node must be licensed. In addition, only one failover node per clustered environment is at no charge for up to ten separate days even if multiple nodes are configured as failover. Downtime for maintenance purposes counts towards the ten separate days limitation. Any other use requires the environment to be fully licensed. In a failover environment, the same license metric must be used for the production and failover nodes when licensing a given clustered configuration. Additionally, when licensing options on a failover environment, the options must match the number of licenses of the associated database. See illustration #4.

*Standby* – In this method, one or more copies of a primary database are maintained on a standby server(s). The sites in a standby configuration may be dispersed geographically and are connected by Oracle Net Services. As the primary database is modified, log information generated by the changes are sent to the standby database(s) and subsequently applied to the standby database. If the primary database fails, a standby database can be activated to be the new primary database. Solutions like Oracle Data Guard (included with Oracle Database EE) or customer-generated scripts can be used. In this environment, both the primary and the standby databases must be fully licensed. Additionally, the same metric must be used to license both databases. See illustration #5.

*Remote Mirroring* – This method involves the mirroring of the storage unit or shared disks arrays. Remotely mirrored storage units may be geographically dispersed and not in the same location as the primary unit, but they share the same disk array. To setup a remote mirroring environment, the Oracle data files, executables, binaries and DLLs are replicated to the mirrored storage unit. Solutions like Veritas Volume Replicator, EMC SRDF, Legato Replistor, and EMS StoreEdge are used to mirror the data stored on the disk arrays. In this environment, both the primary and the remote mirrored databases must be fully licensed. Additionally, the same metric must be used to license both databases. If the Oracle Database is accessing the data from the primary disk array and it is not accessing the mirrored disk array, but it is installed on the mirrored network storage unit, then both database must be fully licensed and the same metric must be used. If a failure occurs in the primary storage unit and the Oracle Database can no longer access the data from the primary disk array, however it is still installed on the primary unit, and data can only be accessed from the remote mirrored disk array, then both databases must still be fully licensed and the same metric must be used. In this environment, Oracle must be fully licensed at the primary site, and if it is ever installed and/or run at the secondary site, it must also be fully licensed there. Additionally, the same metric (i.e. processor-based, or named user-based) must be used to license both databases. See illustration #6.

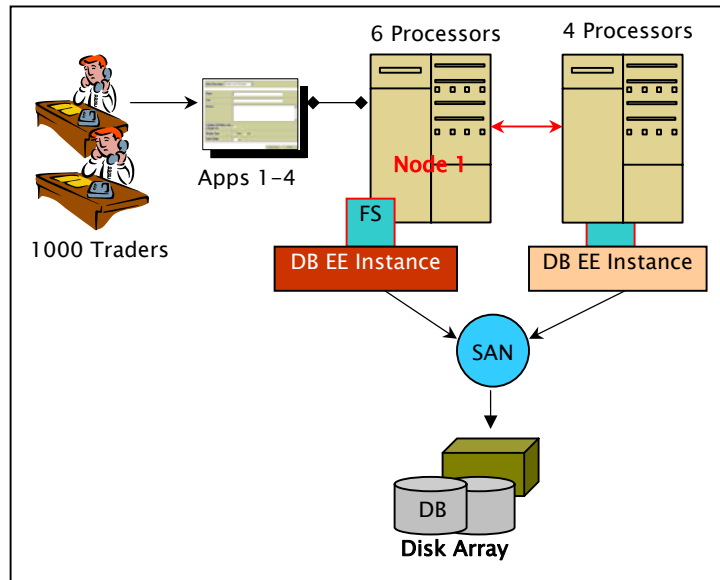
Illustration #3: Backup



- Staging, test and production environments are installed on server 1, which has 6 processors
- Backup of the production environment is done on tapes every night by 1 DBA. These tapes are stored in the tape storage unit
- 10 Developers are working on staging, test and production environments
- 500 traders are using the Web site that resides on production environment

Products to be licensed	Number of licenses required
Oracle Database EE (Test, Staging & Production)	<p>This product can be licensed by Processor or by Named User Plus metric.</p> <ul style="list-style-type: none"> <li>• By Processor: all processors where the database is installed and/or running must be licensed. <ul style="list-style-type: none"> <li>➢ Number of Processor licenses required: <b>6</b></li> </ul> </li> <li>• By Named User Plus: the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the database (= # of traders + developers + DBA), whichever is greater. <ol style="list-style-type: none"> <li>1) 25 * 6 Processors = 150 Named Users Plus</li> <li>2) 500 traders + 10 Developers + 1 DBA= 511 Named Users Plus</li> </ol> <ul style="list-style-type: none"> <li>➢ Number of Named User Plus licenses required: <b>511</b></li> </ul> </li> </ul>

Illustration #4: Failover

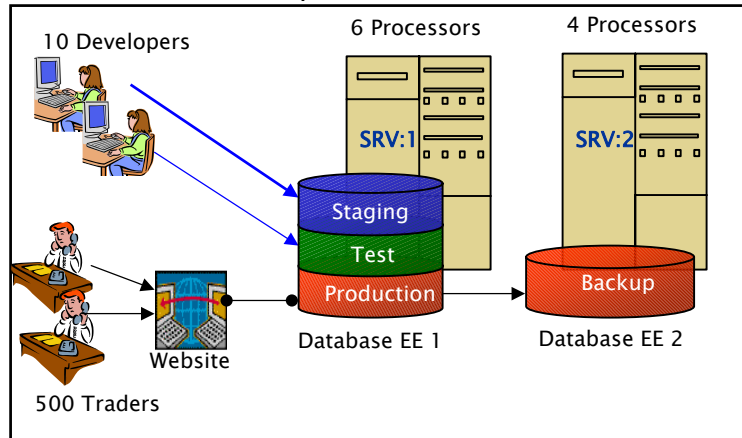


- Failsafe included with Oracle Database EE is installed on nodes 1 and 2; it is running on node 1 only
- If node 1 fails, node 2 takes over (there is always an idle node with Failsafe or other vendor cluster solutions)

Products to be licensed	Number of licenses required
Oracle Database EE	<p>This product can be licensed by Processor or by Named User Plus metric:</p> <ul style="list-style-type: none"> <li>• By Processor: all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>&gt; Number of processors licenses required: <b>6</b> Included: right to run the database on node 2 for up to a total of 10 separate days in any given calendar year</li> </ul> </li> <li>• By Named User Plus: the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of users accessing the Database (= # of traders), whichever is greater:                             <ul style="list-style-type: none"> <li>-1) 25 * 6 Processors = 150 Named Users Plus,</li> <li>-2) 1,000 traders = 1,000 Named Users Plus</li> <li>&gt; Number of Named User Plus licenses required: <b>1,000</b></li> </ul> </li> </ul>



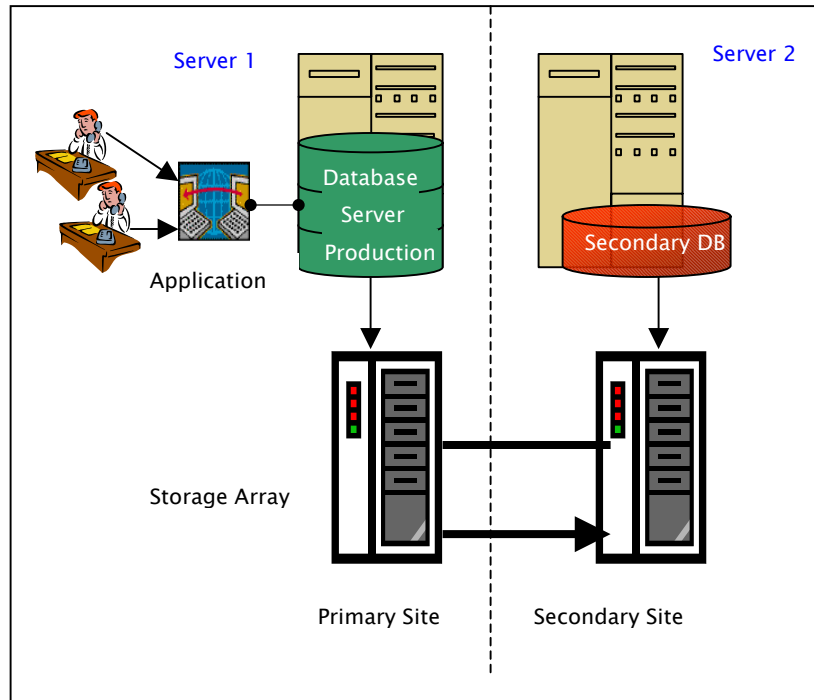
Illustration #5: Standby



- Staging, test and production environments are installed on server 1, which has 6 processors
- Standby environment is configured on server 2, which has 4 processors
- 10 Developers are working on staging, test and production environments
- 500 Traders are using the Web site that resides on the production environment

Products to be licensed	Number of licenses required
Oracle Database EE 1 (Test, Staging & Production)	<p>This product can be licensed by Processor or by Named User Plus metric.</p> <ul style="list-style-type: none"> <li>• If licensing by Processor, all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➤ Number of Processor licenses required: <b>6</b></li> </ul> </li> <li>• If licensing by Named User Plus, the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of traders + developers), whichever is greater.                             <ul style="list-style-type: none"> <li>1) 25 * 6 Processors = 150 Named Users Plus</li> <li>2) 500 traders + 10 Developers = 510 Named Users Plus</li> </ul> </li> </ul> <p>➤ Number of Named User Plus licenses required: <b>510</b></p>
Oracle Database EE 2 (Standby Environment)	<p>This product can be licensed by Processor or by Named User Plus metric.</p> <ul style="list-style-type: none"> <li>• If database 1 is licensed by Processor, then database 2 must also be licensed by Processor – all Processors where database 2 is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➤ Number of Processor licenses required: <b>4</b></li> </ul> </li> <li>• If database 1 is licensed by Named User Plus, then database 2 must also be licensed by Named User Plus. The number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of traders + developers), whichever is greater.                             <ul style="list-style-type: none"> <li>1) 25 * 4 Processors = 100 Named Users Plus</li> <li>2) 500 traders + 10 Developers = 510 Named Users Plus</li> </ul> </li> </ul> <p>Given that the Named User Plus license is a multi-server license, the 510 licensed Named User Plus on Database 1 can also access Database 2. Furthermore, given that the minimum on each server is met (minimum on server 1: 25*6=150; minimum on server 2: 25*4=100; total: 150+100=250), the number of Named User Plus licenses required for Database 2 is <b>0</b></p>

Illustration #6: Remote Mirroring



- Production environments have Oracle Database EE installed on server 1, which has 6 processors
- Mirrored environment is configured on server 2, which has 4 processors. Oracle Database EE is not running, but is installed.
- 500 Traders are using an application that resides on the production environment.
- SAN is being mirrored using either host-based or storage-based solution to DR site

Products to be licensed	Number of licenses required
Oracle Database EE on Server 1	This product can be licensed by Processor or by Named User Plus metric. <ul style="list-style-type: none"> <li>• If licensing by Processor, all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➤ Number of Processor licenses required: <b>6</b></li> </ul> </li> <li>• If licensing by Named User Plus, the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of traders), whichever is greater.                             <ul style="list-style-type: none"> <li>1) 25 * 6 Processors = 150 Named Users Plus</li> <li>2) 500 traders = 500 Named Users Plus</li> <li>➤ Number of Named User Plus licenses required: <b>500</b></li> </ul> </li> </ul>
Oracle Database EE (Remote Mirroring Environment) on Server 2	Given that Oracle DB EE is <i>installed</i> on server 2, it must be licensed by either Processor or by Named User Plus metric. <ul style="list-style-type: none"> <li>• If Server 1 is licensed by Processor, then Server 2 must also be fully licensed by Processor metric. Number of Processor licenses required: <b>4</b></li> <li>• If server 1 is licensed by Named User Plus, then server 2 must also be licensed by Named User Plus. The number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of traders), whichever is greater.                             <ul style="list-style-type: none"> <li>1) 25 * 4 Processors = 100 Named Users Plus</li> <li>2) 500 traders = 500 Named Users Plus</li> <li>➤ Number of Named User Plus licenses required: <b>500</b></li> <li>➤ Minimum required for both servers 1 and 2: (150 + 100) = <b>250</b></li> <li>➤ Additional Named User Plus licenses required: <b>0</b></li> </ul> </li> </ul>

Oracle Database EE (Remote mirroring Environment) on Server 2 (continued)	Given that the Named User Plus license is a multi-server license, the 500 users licensed via Named User Plus on Database 1 can also access Database 2. Furthermore, given that the minimum on each server is met (minimum on Server 1: $25 * 6 = 150$ ; minimum on server 2: $25 * 4 = 100$ ; total: $150 + 100 = 250$ ), the number of Named User Plus licenses required for Database 2 is 0.
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### Partitioning Servers

See the Partitioning document on

<http://www.oracle.com/corporate/pricing/specialtopics.html> for detailed information on partitioning.

### Batching, Import/Export of Flat Files and Multiplexing

Batching and multiplexing have become increasingly important as computing environments have grown in size and complexity. Unfortunately, what constitutes batching or multiplexing is not always consistently defined from vendor to vendor, which can be confusing. Given that these two processes have different implications from a licensing perspective, it is important to fully understand what Oracle considers each to be.

*Batching* – Batching is an activity that allows a group of tasks occurring at different times to be processed all at the same time, while requiring little or no interaction from the user. For most environments, batching is performed to transport data from computer to computer where the database is running.

There are two common methods for batching data into or out of a database:

- Automatic Batch/Data Feeds: This method requires no human interaction because batching scripts have been written that automatically uploads the data. See illustration #7.
- Manual Batch/Data Feeds: This method is a manual process that requires human interaction because the user enables the execution of the batching scripts.

Both Processor and Named User Plus metrics can be used to license environments with batch processing. If licensing a batched environment by Processor, all Processors where the Oracle Database is installed and/or running must be licensed. If licensing a batched environment by Named User Plus, batching data from computer to computer where the database is running, is the only automated

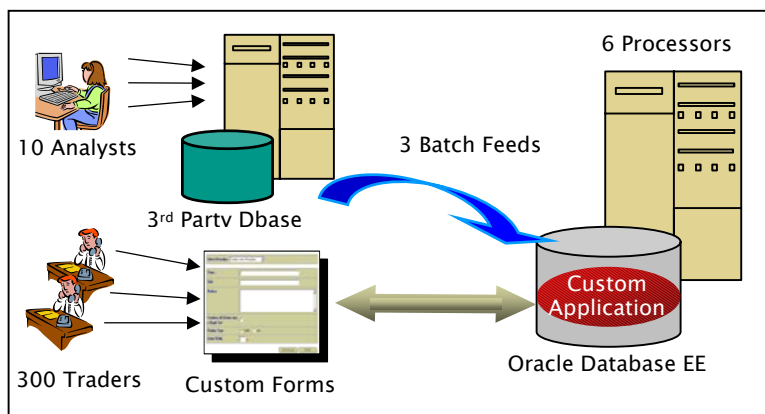
process permitted. In addition, in a manual batched environment, users who are performing the batch/data feeds are considered actual users and need to be licensed. The number of licenses required is the greater of the licensing minimum or the total number of actual users accessing the Oracle program.

*Import/Export of Flat Files* – This method requires human interaction and allows importing or exporting of data from flat files (for example, Excel or CSV files) into the Oracle Database using import and export utilities. Both Processor and Named User Plus metrics can be used. If licensing by Processor, all Processors where the Oracle Database is installed and/or running must be licensed. If licensing by Named User Plus, the users who are performing the import/export of flat files are considered actual users and need to be licensed. The number of licenses required is the greater of the licensing minimum or the total number of actual users accessing the Oracle program. See illustration #8.

*Multiplexing* – Multiplexing is when a large number of end users and/or devices access a system via an interface, such as a TP monitor or a web server product, so that the apparent number of users and/or devices accessing the system is much smaller than the actual number of users and/or devices. If Oracle software is part of an environment in which multiplexing hardware or software is used, then all users and/or devices must be licensed at the multiplexing front end.

Both Processor and Named User Plus metrics can be used to license the multiplexing environment. If licensing a multiplexing environment by Processor, all Processors where the Oracle Database is installed and/or running must be licensed. If licensing a multiplexing environment by Named User Plus, the number of licenses required is the licensing minimum or the total number of actual users at the multiplexing front end who are accessing the Oracle program, whichever is greater. See illustration #9.

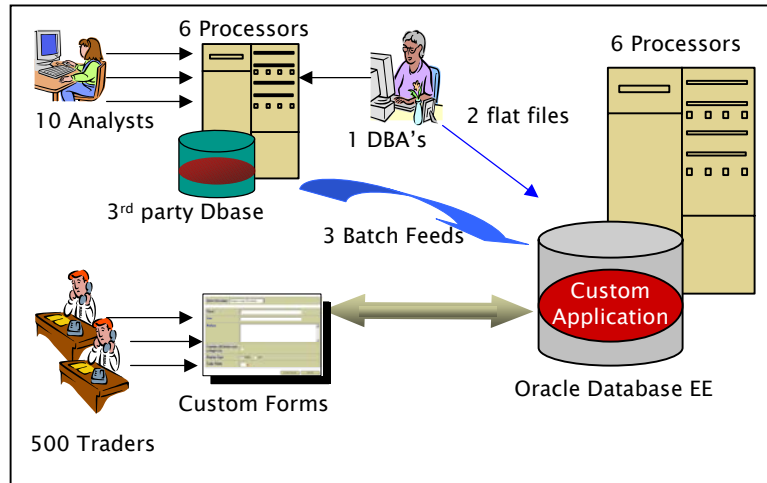
Illustration #7: Batch Processing



- 3 unique Batch/Data feeds that update the Oracle Database
- 300 traders access the Oracle Database EE
- 10 analysts access the 3<sup>rd</sup> party database
- Oracle Database is running on a 6 processor server

Products to be licensed	Number of licenses required
Oracle Database EE	<p>This product can be licensed by Processor or by Named User Plus metric.</p> <ul style="list-style-type: none"> <li>• By Processor: all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➢ Number of Processor licenses required: <b>6</b></li> </ul> </li> <li>• By Named User Plus: the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of traders), whichever is greater.                             <ul style="list-style-type: none"> <li>1) 25 * 6 Processors = 150 Named Users Plus</li> <li>2) 300 traders = 300 Named Users Plus</li> </ul> </li> </ul> <p>➢ Number of Named User Plus licenses required: <b>300</b></p>

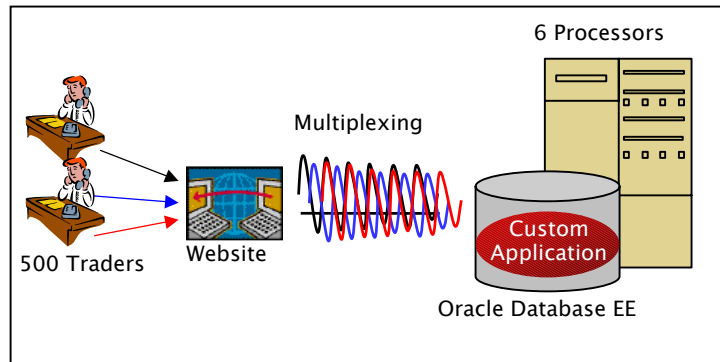
Illustration #8: Import/Export of Flat Files into Oracle Database



- 3 automated batch feeds that update the Oracle Database
- 500 traders access the Oracle Database via 300 computers
- 10 analysts are accessing the 3rd party database
- 1 DBAs are importing two flat files into Oracle Database
- Oracle Database is running on a 6 processor server

Products to be licensed	Number of licenses required
Oracle Database EE	<p>This product can be licensed by Processor or by Named User Plus metric:</p> <ul style="list-style-type: none"> <li>• By Processor: all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➢ Number of processors licenses required: <b>6</b></li> </ul> </li> <li>• By Named User Plus: the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of users accessing the Database (= # of traders + 1 DBA), whichever is greater:                             <ul style="list-style-type: none"> <li>-1) 25 * 6 Processors = 150 Named Users Plus,</li> <li>-2) 500 traders + 1 DBA= 501 Named Users Plus</li> </ul> </li> <li>➢ Number of Named User Plus licenses required: <b>501</b></li> </ul>

Illustration #9: Multiplexing



- Data from the source host system is multiplexed by the Web server where the Web site is configured
- 500 traders access the Oracle Database
- Oracle Database is running on a 6 processor server

Products to be licensed	Number of licenses required
Oracle Database EE	<p>This product can be licensed by Processor or by Named User Plus metric.</p> <ul style="list-style-type: none"> <li>• By Processor: all processors where the database is installed and/or running must be licensed.                             <ul style="list-style-type: none"> <li>➤ Number of Processor licenses required: <b>6</b></li> </ul> </li> <li>• By Named User Plus: the number of licenses required is 1) the Named User Plus minimum (25 Named Users Plus per Processor) OR 2) the total number of actual users accessing the Database (= # of traders), whichever is greater                             <ul style="list-style-type: none"> <li>1) 25 * 6 Processors = 150 Named Users Plus</li> <li>2) 500 traders = 500 Named Users Plus</li> <li>➤ Number of Named User Plus licenses required: <b>500</b></li> </ul> </li> </ul> <p><b>Note:</b> Given that this is a multiplexing environment, all users at the front end of multiplexing must be licensed.</p>

To learn more about Oracle Technology, please visit <http://www.oracle.com/database> or call +1.800.633.0750.

To learn more about Oracle Global Pricing and Licensing, please visit [www.oracle.com/corporate/pricing](http://www.oracle.com/corporate/pricing).

To access the Technology Price List, please click here: [Technology Price List](#)

# Application Products

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## Sections

Overview

Licensing Models

Prerequisites Rules

## Overview

In addition to its technology products, Oracle's portfolio includes applications software. Oracle application product lines include: Oracle E-Business Suite, Siebel, PeopleSoft and JD Edwards. In addition to these horizontal applications, Oracle also offers a complete set of vertical applications that address the specific needs of various industries. Below is a brief overview of Oracle Applications.

Category	Description
Oracle Analytic and Business Intelligence (BI) Applications	<p>Oracle is the leading business analytics software vendor and offers the industry's most comprehensive set of solutions that span data warehouse, ETL (extract, transform, load), business intelligence and analytics across all areas of the enterprise. Products operate from a single source of truth with direct drill back to your transaction systems. Capabilities include corporate performance management, interactive dashboarding, and embedded analytic functionality for delivering insight across the entire enterprise. Open and pre-built, these industry-specific business intelligence applications provide actionable intelligence for each business function and user role.</p> <p>Oracle Analytic and Business Intelligence Applications products include: Marketing &amp; Sales Intelligence; Activity-Based Management; Balanced Scorecard; Financial Analyzer; and Analytics for CRM, Workforce, Contact Center, Supply Chain, among others. <i>Please note this is only a subset of the available Analytic and Business Intelligence applications offered by Oracle.</i></p>



Category	Description
Oracle Customer Relationship Management (CRM)	<p>With over 4.6 million live users, Oracle CRM is the broadest, best-selling and most-implemented CRM solution available today. Oracle CRM provides solutions that include all of the business processes and associated systems that touch a customer, from marketing and sales to contracts and order management to customer support and service.</p> <p>Oracle Customer Relationship Management products include: Marketing; Email Marketing Server; Telemarketing; Telesales; Field Sales; Territory Management; Strategic Account Planning; Proposals and Presentations; Contracts; Customer Order Management; Partner Relationship Management; Channel Management; Field Service; and Contact Center and Support. <i>Please note this is only a subset of the available Customer Relationship Management applications offered by Oracle.</i></p>
Oracle Financial Management	<p>Oracle delivers a truly unified accounting structure that improves visibility, control, and efficiency while making it easy for finance departments to centralize work that crosses multiple lines of business and regions. With Oracle's broad range of Financial Management applications, financial information is consistently collected, calculated, analyzed and stored, ensuring data integrity while reducing costs.</p> <p>Oracle Financial Management products include: Enterprise Planning and Budgeting; Asset Lifecycle Management; General Ledger; Assets; Cash Management; Accounts Payable; Accounts Receivable; Treasury; Advanced Collections; and Lease Management. <i>Please note this is only a subset of the available Financial Management applications offered by Oracle.</i></p>
Oracle Governance, Risk, and Compliance (GRC) Management	<p>Oracle Governance, Risk, and Compliance Management software enables industry best practices and manages multiple compliance requirement frameworks from a single platform. The GRC platform provides integrated risk and access management, controls monitoring and reporting while providing real-time access to compliance, risk and performance management data.</p>

Category	Description
Oracle Governance, Risk, and Compliance Management (continued)	<p>Oracle Governance, Risk, and Compliance Management products include: Financials Intelligence; Financial Consolidation Hub; Enterprise CFO Portal; Internal Controls Manager, Internal Controls Enforcer; and Enterprise Investor Portal. <i>Please note this is only a subset of the available Governance, Risk, and Compliance Management applications offered by Oracle.</i></p>
Oracle Human Capital Management (HCM)	<p>Oracle has the only global, award-winning Human Capital Management solution for organizations of every size and industry. Oracle's family of web-based applications automates the entire human resources process from recruit to retire, and allows companies to align and train their workforce in accordance to strategic objectives.</p> <p>Oracle Human Capital Management products include: eRecruit; Enterprise Learning Management; Self-Service HR; Advanced Benefits; Workforce Scheduling; Time and Labor; Payroll; Expense Management; ePerformance; Absence Management; Stock Administration; and Pension Administration. <i>Please note this is only a subset of the available Human Capital Management applications offered by Oracle.</i></p>
Oracle Procurement	<p>Oracle's family of Procurement applications helps companies optimize supplier relationships by streamlining the entire purchasing process. Oracle offers four integrated product lines that allow businesses to strategically source goods and services; have real-time exchange with suppliers; automate and manage the entire procurement process; enable best practices; and enforce policy compliance.</p> <p>Oracle Procurement products include: Sourcing; Purchasing; Catalog Management; Procurement Management; Supplier Contract Management; Inventory Management; iSupplier Portal; and Supplier Self-Service. <i>Please note this is only a subset of the available Procurement applications offered by Oracle.</i></p>

Category	Description
Oracle Project Management	<p>The Oracle Project Management product lines enable project-centric organizations and departments to establish operational processes that support the complete project management lifecycle. Regardless of an organization's size or industry focus, these applications allow companies to choose the right projects, assign the right resources, streamline execution, and track profitability via budgeting, forecasting, and billing/chargebacks.</p> <p>Oracle Project Management: products include: Proposal Management; Contracts; Project Resource Management; Project Costing; Time and Labor; Project Billing; Project Portfolio Analysis; Change Management; and Grants. <i>Please note this is only a subset of the available Project Management applications offered by Oracle.</i></p>
Oracle Supply Chain Management (SCM)	<p>Oracle offers four Supply Chain Management product lines that address requirements across procurement, order management, manufacturing, product lifecycle management, maintenance, logistics and supply chain planning and execution. Oracle SCM family of applications integrate and automate all key supply chain activities from design, planning and procurement to manufacturing and fulfillment.</p> <p>Oracle Supply Chain Management products include: Supply Chain Planning; Inventory Optimization; Global Order Promising; Product Configurator; Flow Production; Discrete Manufacturing; Quality Management; Requirements Planning; Warehouse Management; and Production Scheduling. <i>Please note this is only a subset of the available Supply Chain Management applications offered by Oracle.</i></p>

## Licensing Models

The objective of Oracle application products' pricing and licensing strategy is to provide customers flexibility and predictability with their software investment. To achieve this objective, all application products are available under at least one of the following three licensing models: Component pricing, Custom Applications Suite pricing, and Enterprise pricing. These licensing models allow customers, in a single order, to mix and match licenses that best fit their operating environment. However, please note, that due to the terms, conditions and functionality of some applications, not all products are available in all three pricing models. Brief overviews of three licensing models are included below.

### Component Pricing Model

To reflect Oracle's wide variety of applications, multiple license metrics are offered under the Component pricing model. It is Oracle's traditional a la carte pricing and it is a cost effective model for the customer licensing one to a few Oracle products with a limited number of end users.

It is important to note that though this model is positioned as Oracle's a la carte pricing for a limited number products with a limited number of end users, there are many larger customer environments where the Component model may be the most appropriate model to license.

The Component licensing metrics can be separated into two basic categories: user-based and usage-based. User-based metrics count who is authorized to use the software. Common user-based license metrics include: Application User, Employee, Customer, Subscriber, etc.

Examples of user-based metrics:

*Application User* – is defined as an individual authorized by you to use the applicable licensed application programs which are installed on a single server or on multiple servers regardless of whether the individual is actively using the programs at any given time.

*Employee* – is defined as all of your full-time, part-time, temporary employees and all of your agents, contractors and consultants. The Employee Count and not the actual number of users determine the quantity of the licenses required. In the event that customer elects to outsource any business function(s), all of the full-

time, part-time, temporary employees and agents, contractors and consultants of the company providing the outsourcing services must be counted for the purposes of determining Employee Count.

*Subscriber* – This metric is primarily used with communications/utilities applications. It is based on the number of discrete units subscribing to the product or service managed by the installed program. A subscriber may be a human being, or it may be a non-human connection, such as a working telephone number for wire-line devices, portable handsets or paging devices, or a live connected utility meter.

Usage-based metrics count items the application processes or creates as an output, such as, Electronic Order Line, Expense Report, Customer Record, or \$M Cost of Goods Sold.

Examples of usage-based metrics:

*\$M Cost of Goods Sold (COGS)* – This metric is primarily used with Supply Chain Planning applications. It is based on the cost of goods a company has sold in its fiscal years and it is defined in millions of US dollars. In the event the COGS are unknown then the COGS shall be equal to 75% of the company's total revenue.

*Electronic Order Line* – This metric is based on the number of Electronic Order Lines that are entered in the application during a one-year period.

*Expense Reports* – As its name indicates, this metric is used for applications that generate expense reports, and is based on the number of expense reports that are processed through the application during a one-year period.

### **Custom Applications Suite (CAS) Pricing Model**

The goal of the Custom Applications Suite model is to provide customers and partners the ability to create custom bundles based on their user needs. CAS licensing is for companies standardizing on Oracle that have specific user populations requiring access to all the applications in a bundle. Customers can select applications from across the Oracle, Siebel, PeopleSoft and JD Edwards product lines.

The CAS pricing model has one license metric:

*Custom Suite User* – This metric is defined as an individual authorized to use the application programs included in the CAS bundle, which are installed on a single server or multiple servers, regardless of whether the individual is actively using the programs at any given time.

Minimums and restrictions apply to Custom Applications Suite licensing; please contact your Oracle sales representative to determine if this model best fits your needs.

### **Enterprise Applications Pricing Model**

Targeted at companies standardizing on Oracle and expecting many users, both internal and external, the Enterprise Applications license model allows customers to license the desired products for their entire organization without having to keep track of specific user licenses, servers or deployment locations. The Enterprise Applications model can be ideal for large organizations as well as businesses that find it difficult to keep track of licenses (e.g., applications are deployed over multiple geographies).

The Enterprise Applications pricing model has five licensing metrics, and the most common metric is:

*Enterprise \$M in Revenue* – This metric is defined as one million US dollars in total revenue generated by the business in their fiscal year.

Minimums and restrictions apply to Enterprise Applications licensing; please contact your Oracle sales representative to determine if this model best fits your needs.

To learn more about Oracle Applications, please visit <http://www.oracle.com/applications> or call +1.800.633.0738.

To learn more about Oracle Global Pricing and Licensing, please visit [www.oracle.com/corporate/pricing](http://www.oracle.com/corporate/pricing).

To access Oracle Applications price lists, please click here: [Applications price list](#)

# On Demand

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## Sections

Overview

Administration Services

Computer and Administration Services

On Demand Services for Programs That You Already Own

## **Overview**

As a part of Oracle Services, Oracle On Demand is a series of software-as-a-service offerings that allow companies to have applications, database and supporting IT infrastructure outsourced and managed by Oracle experts. The Oracle software can be hosted in an award winning Oracle data center, in a customer's own facility or at a third-party site.

Oracle offers its industry leading Technology and Application products in either a subscription service or managed applications service model. The subscription model has no up-front costs and allows for a quick start without extensive IT department help. The managed applications model provides deep industry and sector specialization and is run on a dedicated infrastructure. Hardware for subscription services always resides at an Oracle data center. The hardware for a managed applications model may reside at an Oracle data center, a customer site, or the site of a third party. Below is a brief overview of the Oracle On Demand solutions.

Category	Description
Oracle Technology On Demand	<p>Oracle Technology On Demand gives customers the flexibility to have their IT infrastructure—including databases, portals, and data warehouses—managed remotely, securely and in real-time. Technology On Demand lowers total cost of ownership while improving system availability, performance and security; this allows customers to focus on running their business instead of managing their infrastructure. Oracle Technology on Demand offers Oracle's industry leading database products including: Standard Edition One, Standard Edition, Enterprise Edition as well as Oracle's data warehousing and application server products.</p> <p>Oracle Technology On Demand may be hosted at an Oracle data center (Computer and Administration Services) or at the site of a customer or third party (Administration Services).</p>

Category	Description
Oracle Collaboration Suite On Demand	Oracle Collaboration Suite On Demand is a complete service for messaging, calendaring, file sharing, and real-time communications. Oracle experts manage Oracle Collaboration Suite, so you can deliver better service, availability, security, and performance to your users. Oracle Collaboration Suite On Demand may be hosted at an Oracle data center (Computer and Administration Services) or at the site of a customer or third party (Administration Services).
Oracle E-Business Suite On Demand	On Demand offers customers Oracle's E-Business Suite of applications including customer relationship management, enterprise resource planning and supply chain management. Oracle E-Business Suite On Demand may be hosted at an Oracle data center (Computer and Administration Services) or at the site of a customer or third party (Administration Services).
PeopleSoft Enterprise On Demand	PeopleSoft Enterprise On Demand is a set of managed application services for PeopleSoft's flagship Human Capital Management applications. PeopleSoft Enterprise On Demand is hosted at an Oracle data center (Computer and Administration Services) and is sold for various program sets know as "Pillars".
Oracle On Demand for Siebel CRM	Oracle On Demand for Siebel CRM is a set of managed application services for Siebel's comprehensive customer relationship management applications. Oracle On Demand for Siebel CRM is hosted at an Oracle data center (Computer and Administration Services) and is sold for various program sets know as "Verticals".
Siebel CRM On Demand	Siebel CRM On Demand is Oracle's low-risk, hosted customer relationship management subscription that helps eliminate start-up costs and reduce IT budgets to a predictable monthly fee. Siebel CRM On Demand enables companies of all types and sizes to accelerate sales, improve marketing and deliver consistent top-notch customer service through a powerful, easy-to-use web application.
Siebel Call Center On Demand	Siebel Call Center On Demand is a hosted subscription of Telephony@Work, which provides carrier grade, IP-based software infrastructure for hosted contact center services.
iLearning Subscription Service	The iLearning Subscription Service is a hosted, web-based learning management system that provides a complete infrastructure to manage, deliver and track training participation in online or classroom environments.
Retail.com	Retail.com is Oracle's hosted subscription of Retek's Design and WebTrack applications.



**Administration Services**

Administration Services is one of the two On Demand hosting services offered by Oracle. Administration Services include system administration, application technology management and monitoring activities provided remotely by Oracle for the licensed Oracle programs.

**Computer and Administration Services**

Computer and Administration Services are system administration, application technology management, and monitoring activities for licensed Oracle programs that are provided by Oracle from a data center hosting facility to which the customer has remote applications access.

**On Demand Services for Programs That You Already Own**

If you wish to purchase Administration Services or Computer and Administration Services for Oracle technology products or E-Business Suite applications that you have already purchased, you have two options:

- Leave your existing licenses as they are. The On Demand fees will be based on the current list license price of your configuration. If one or more of the products and/or licensing metrics in your licensed configuration are not included in Oracle's current price list when you acquire the On Demand services, then the On Demand fees will be based on the most recently published Oracle price list that contained both the product name and licensing metric as specified in your configuration.
- Migrate your existing licenses in accordance with Oracle's standard license migration and upgrade policies. The On Demand fees will be based on the current list license price of the migrated configuration

To learn more about Oracle On Demand, please visit [www.oracle.com/ondemand](http://www.oracle.com/ondemand) or call +1.866.264.5909.

To learn more about Oracle Global Pricing and Licensing, please visit [www.oracle.com/corporate/pricing](http://www.oracle.com/corporate/pricing).

To access the On Demand Price List, please click here: [On Demand Price List](#)

# Services

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## Sections

Overview

Oracle Support Services

Oracle Consulting

Oracle University

## **Overview**

Oracle Services help you get the most from your technology investment. Working with you every step of the way, Oracle provides a variety of services that span the complete solution life cycle. Whether you need Oracle Support Services, Consulting, or Education, you can get it from the experts who know Oracle best.

## **Oracle Support Services**

Oracle Support Services are an important component of your software investment. Acquiring technical support provides you with access to software updates to stay current on the latest technology. It also allows you to migrate and upgrade your licenses to manage your software environment according to your current business needs, and gives you access to Oracle's expert advice about installing, configuring and running Oracle software in myriad environments.

## Oracle Support Services Sections

Overview

Lifetime Support Policy

Unbreakable Linux

## **Overview**

Oracle's industry-leading support helps you reduce the time, effort, and cost of operating your Oracle systems. Real-time diagnostic and monitoring capabilities identify system performance problems before they affect your business. Oracle experts help you optimize your systems for availability and performance, as well as assist with product enhancements as they are released. And with Oracle's Lifetime Support Policy you can trust that your systems will be up-to-date, secure, and operating at peak performance for as your business needs require. The following table highlights Oracle Support Services' key offerings:

Category	Description
Premier Support	<p>Premier Support, referred to as Software Update License &amp; Support on your Ordering Document and the Oracle Price Lists, is the standard level of Oracle Support Services and includes:</p> <ul style="list-style-type: none"> <li>• Major product and technology releases</li> <li>• Updates, fixes, security alerts, and critical patch updates</li> <li>• Assistance with service requests 24 hours a day, 7 days a week</li> <li>• Access to premier web support services: Oracle <i>MetaLink</i>, Customer Connection, SupportWeb, or myPortal</li> <li>• Tax, legal, and regulatory updates</li> <li>• Upgrade scripts</li> <li>• Non-technical customer service during normal business hours</li> <li>• Certification with new Oracle products and third-party products/versions</li> </ul>
Advanced Customer Services	<p>Advanced Customer (ACS) Services is an enhanced Premier Support offering that provides a portfolio of customized and proactive services that give customers direct access to Oracle experts. Depending on the level of support and guidance a customer needs, they can choose from the following five programs:</p> <ul style="list-style-type: none"> <li>• <i>Assisted Services</i>: is the most flexible set of ACS offerings, choose the depth and breadth of services on an as-needed basis</li> <li>• <i>Priority Service</i>: highly integrated service partnership that provides front-of-the-line assistance from Oracle Support and Development along with a designated manager for escalating service requests</li> <li>• <i>Advanced Support Assistance</i>: provides a Service Delivery Manager, proactive configuration and performance analysis and management of critical service requests</li> <li>• <i>Business Critical Assistance</i>: offers all of the features of Advanced Support Assistance, plus access to specialized Service Delivery Engineers who provide proactive services</li> <li>• <i>Solution Support Center</i>: offers all the benefits of Business Critical Assistance and is the most comprehensive ACS package; offering the highest level of support and customer-centric attention from a dedicated team of Oracle Service Delivery Engineers, 24/7</li> </ul>
Incident Server Support Packages	<p>Provides incident-based web support on a per server basis in packages of 10 service requests. Packages do not include updates and are available in the following product sets:</p> <ul style="list-style-type: none"> <li>• Oracle Database Server Support Package supports: Enterprise Edition, Standard Edition, Standard Edition One, Partitioning and Real Application Clusters Options</li> <li>• Oracle Application Server Support Package supports: IAS Enterprise Edition, Standard Edition and Java Edition</li> </ul>

Category	Description
JDeveloper Support	JDeveloper Support is available for the free version of JDeveloper that is downloadable from the Oracle Technology Network (OTN). It provides direct access to Oracle experts and information via Oracle <i>MetaLink</i> for product specific questions for installing and operating JDeveloper
Oracle Lite Support	Oracle Lite Support is available for the free Oracle Database Lite Client product. Oracle Lite Support provides the same level of service as Premier Support.
Extended Support	<p>After Premier Support expires, Extended Support provides an extra three years of support for specific Oracle releases and includes:</p> <ul style="list-style-type: none"> <li>• Major product and technology releases</li> <li>• Updates, fixes, security alerts, and critical patch updates</li> <li>• Assistance with service requests 24 hours per day, 7 days per week</li> <li>• Access to <i>OracleMetaLink</i>, Customer Connection, or SupportWeb</li> <li>• Tax, legal and regulatory updates</li> <li>• Upgrade scripts</li> <li>• Non-technical customer service during normal business hours</li> </ul> <p>Extended Support <u>does not</u> include:</p> <ul style="list-style-type: none"> <li>• Certification with new third party products/versions</li> </ul>
Sustaining Support	<p>Once Extended Support expires, Oracle will make available Sustaining Support for all Oracle products and includes:</p> <ul style="list-style-type: none"> <li>• Major product and technology releases</li> <li>• Existing program updates, fixes, security alerts, and critical patch updates</li> <li>• Assistance with service requests, on a commercially reasonable basis, 24 hours per day, 7 days per week</li> <li>• Access to <i>OracleMetaLink</i>, Customer Connection, or SupportWeb</li> <li>• Existing upgrade scripts</li> <li>• Non-technical customer service during normal business hours</li> </ul> <p>Sustaining Support <u>does not</u> include:</p> <ul style="list-style-type: none"> <li>• New program updates, fixes, security alerts, and critical patch updates</li> <li>• New tax, legal and regulatory updates</li> <li>• New upgrade scripts</li> <li>• Certification with new third party products/versions</li> </ul>

Oracle's Support Services organization is unmatched in breadth of knowledge, size, and scale. Customers have access to 24x7 real-time support for mission-critical issues through our Global Support Center. With 17 major hubs on five continents, our global reach enables us to support you in any time zone in which you do business. Our 7,000 support experts provide in-depth product and technical

expertise in 27 languages. Oracle provides you with the right service solution for your entire technology environment.

### **Lifetime Support Policy**

The Oracle Lifetime Support Policy provides access to technical experts for as long as you license and continue to pay for support of your Oracle products. It is the most comprehensive support policy available and covers your entire technology environment, from database to middleware to applications, an industry first, only from Oracle. Our Lifetime Support consists of three support stages: Premier Support, Extended Support, and Sustaining Support.

Premier Support, also referred to as Software Update License & Support, provides maintenance and support for Oracle Database, Oracle Fusion Middleware and Oracle Applications for five years from their general availability date. Software Update License & Support is Oracle's standard level of service and it includes software updates, patches, general maintenance releases and selected functionality releases, along with telephone support. Also provided with Premier Support are online services through Oracle's web-based customer support systems, which include: Oracle *MetaLink* (for Oracle Technology and E-Business Suite Applications programs); Customer Connection (for PeopleSoft and JD Edwards programs); and SupportWeb (for Siebel programs). These web-based support programs include online self-service tools, 24/7 technical support, and the ability to log, track, update and review service requests online.

Premier Support is priced as a percentage of the global license price and attracts the same discount as the associated license purchase. Premier Support is invoiced annually in advance. When customers acquire Oracle support, all licenses in any given license set must be supported under the same technical support service level.

For customers requiring additional customer support, Oracle also offers Advanced Customer Services, an enhancement to Premier Support, that delivers tailored, flexible support solutions built to meet customers' specific business requirements. Advanced Customer Services offers five separate programs with targeted expertise and proactive guidance that align with your company's technology strategy.

The Lifetime Support Policy makes it easier for customer to plan and budget for Oracle's exclusive product upgrade.

As noted earlier, Premier Support provides maintenance, support and upgrades for Oracle software programs for five years from their general availability release date. Once Premier Support expires, customers who do not wish to, or are unable to migrate to new versions or replacement products, can receive Extended Support, for an additional fee, for an extra three years for certain Oracle programs. Once Extended Support expires (or for Oracle products that do not have Extended Support offered), Oracle will make available Sustaining Support for all Oracle programs.

In addition to the Lifetime Support offerings, Oracle also provides web-based, incident support packages for specific Oracle Database Products and offers an online support program for Oracle JDeveloper.

To learn more about Oracle Support Services, please visit: [www.oracle.com/support](http://www.oracle.com/support) or call +1.800.833.3536.

To learn more about Oracle Technical Support Policies, please visit: [www.oracle.com/support/policies.html](http://www.oracle.com/support/policies.html)

### **Unbreakable Linux**

Oracle's Linux commitment began in 1998 with its first commercial database on Linux, and in 2006, launched Oracle Unbreakable Linux, an enterprise-class support program that delivers award winning global support for the Linux operating system. Unbreakable Linux is a support program, not a distribution, and anyone can get Linux support from Oracle regardless of whether or not they are using Oracle products.

Oracle has a dedicated team of Linux engineers that provide comprehensive testing and optimization of Linux with third-party hardware, storage, networking, and drivers. Unbreakable Linux provides support for the entire software stack running on Linux, including enterprise applications, middleware, database and the operating system.

For Oracle Unbreakable Linux support subscribers, Oracle provides the Unbreakable Linux Network (ULN), which is a comprehensive resource that offers access to Linux software patches, updates and fixes, along with information on program support and policies. Unbreakable Linux provides free installable binaries for Enterprise

Linux and offers three levels of Linux support to choose from: Network, Basic and Premier. The following table highlights the key Linux support level features provided by Oracle:

Category	Description
Enterprise Linux Premier Support	Available for five years from the general availability release date of the Enterprise Linux program, Enterprise Linux Premier Support includes: <ul style="list-style-type: none"> <li>• Unlimited service requests</li> <li>• Access to patches, fixes, and security alerts</li> <li>• 24x7 access to Oracle <i>MetaLink</i></li> <li>• 24x7 access to Oracle Unbreakable Linux Network</li> <li>• Hardware certification</li> <li>• Backport of fixes, using commercially reasonable efforts, for any Enterprise Linux program released from Oracle within the last six months, or for any Linux program released from other vendors per the Backport Schedule document</li> </ul>
Enterprise Linux Basic Support	Available for three years from the general availability release date of the Enterprise Linux program, Enterprise Linux Basic Support includes: <ul style="list-style-type: none"> <li>• Unlimited service requests</li> <li>• Access to patches, fixes, and security alerts</li> <li>• 24x7 access to Oracle <i>MetaLink</i></li> <li>• 24x7 access to Oracle Unbreakable Linux Network</li> <li>• Hardware certification</li> </ul>
Enterprise Linux Network Support	Available for three years from the general availability release date of the Enterprise Linux program, Enterprise Linux Network Support includes: <ul style="list-style-type: none"> <li>• Access to patches, fixes, and security alerts</li> <li>• 24x7 access to Oracle Unbreakable Linux Network</li> </ul>

To learn more about Oracle Unbreakable Linux, please visit:  
[www.oracle.com/technologies/linux](http://www.oracle.com/technologies/linux) or call +1.800.633.0738.

To visit the Oracle Unbreakable Linux Store, please go to:  
<http://oraclestore.oracle.com/linux>

To learn more about Oracle Enterprise Linux Support Policies, please visit:  
[www.oracle.com/support/policies.html](http://www.oracle.com/support/policies.html)

## Oracle Consulting

From initial strategic planning to rapid implementations and upgrades, Oracle Consulting's goal is to ensure that your company succeeds with its investment in Oracle technology.

### Oracle Consulting Sections

Overview

International Business Rates (IBR)

Fixed Scope Offerings

### Overview

Oracle consultants help fit Oracle technology to your business processes and needs. From initial strategic planning to rapid implementation and upgrade, Oracle offers an end-to-end consulting solution. To help you maximize your Oracle investment, Oracle Consulting works hand-in-hand with Oracle Development. Oracle consultants combine multiple delivery vehicles—including onsite, onshore, near shore, and offshore—to create the appropriate plan for each phase of your project and achieve fast, cost-effective deployment of Oracle products

### International Business Rates (IBR)

Because the cost of labor can vary substantially around the world, Oracle utilizes the International Business Rates (IBRs) to price consulting services in all countries where Oracle Consulting operates. The International Business Rates have been developed to allow Oracle Consulting to:

- Price resources on a consistent basis
- Comply with certain pricing regulations of the European Union
- Maintain a common economic model in all practices throughout the world

The International Business Rate for a resource from a given country is calculated based on multiplying a country's global pricing index value (IBR index) by the Global Rate for the consultant's level (in USD) and then by the country's exchange rate. It is important to note that the price is determined by where the Oracle consultant comes from, not where he delivers the service.

### Fixed Scope Offerings

Oracle Consulting offers fixed scope, rapid-time implementations and uses internet-based technologies to deliver services quickly, conveniently, and at lower cost. Based on a predefined set of proven business practices, Oracle's fixed scope



offerings are designed to deliver critical business processes and reduce the complexity, time, and cost associated with large-scale implementations—while delivering global functionality and availability. Oracle Consulting can help you simplify and standardize your business on leading business flows in as little as 30 days.

To learn more about Oracle Consulting, please visit: [www.oracle.com/consulting](http://www.oracle.com/consulting) or call +1.800.633.0615

## Oracle University

Oracle University provides a training curriculum that benefits customers working to accelerate the adoption of a new technology and individuals seeking to enhance their Oracle-related technical skills.

### Oracle University Sections

Overview

Instructor-Led Training

Private Events

Live WebClass

Self-Study CD-ROM

Knowledge Center

Oracle Certification Program (OCP)

### Overview

Oracle University provides training on Oracle software. Courses are created by Oracle curriculum developers and taught by instructors with real-world, hands-on experience. Training with Oracle helps accelerate the adoption of your new technology solution, optimizing your return on investment.

Oracle University offers courses for many skill levels, using a variety of learning methods including classroom-based, web-based and customized private events that are all designed to meet time and budget needs.

Oracle also provides industry-recognized certification programs that validate training and experience and help students excel in their knowledge as well as in their career.

### Instructor-Led Training

Oracle University offers instructor-led training for hundreds of learning topics. Our most popular and comprehensive learning format, instructor-led training provides students with hands-on experience to match job role requirements and to prepare students for Oracle Certification exams. From in-class demonstrations to hands-on labs, Oracle University instructor led training provides a dynamic learning environment.

**Private Events**

Oracle University is now offering Private Event Training for customers who are looking for more customized team training programs based on their specific organizational requirements. Private events are designed to maximize the learning experience and suit the specific needs of your implementation team, IT department or other technology groups. If you have a team of employees needing the same training, can train them together and want to keep travel to a minimum, Oracle private events are the ideal solution.

**Live WebClass**

Receive live instruction at your home or office and save time and travel expenses. Expert Oracle instructors deliver the same quality of training as in our classroom. Depending on the course, this is done via a standard training day format online with the instructor or four hours of online instruction with scheduled office hours and self study assignments. Students also receive hands-on practice with access to a live, hosted software environment.

The training is conducted with both a live web and audio conference. Students will need to ensure their system is configured correctly in order to join and participate in their class successfully.

**Self Study CD-ROM**

For training at your own pace, at any time and any place, Oracle University Self-Study CD-ROMs are available as individual courses. Our collection of titles cover Oracle products as well as related IT topics. Many titles cover the same content as our Instructor-Led Trainings and can be used to reinforce classroom learning, while others expand on general and specialty topics. Comprehensive, engaging lessons use the latest multimedia and instructional design to provide hands-on training.

Self Study CD-ROMS are an ideal way to train if you cannot attend class or prefer to learn on your own.

**Knowledge Center**

The Oracle University Knowledge Center offers on-demand access to self-paced courses. The Center includes thousands of online courses, recorded WebClasses and recorded WebSeminars. Since travel time and expenses are eliminated with the Knowledge Center, you can transfer critical skills to more of your staff. Classes can

be taken 24 hours a day, seven days a week from any location. The Oracle University Knowledge Center helps students to:

- Prepare to become an Oracle Certified Professional
- Explore advanced technology topics
- Get implementation expertise
- Train a global workforce
- Reference materials to supplement instructor led training materials

### **Oracle Certification Program (OCP)**

Oracle certifications are tangible, industry-recognized credentials that can help you succeed in your IT career and provide measurable benefits to your employer.

Oracle certifications are a reliable validation of training and experience that can accelerate your professional development, improve your productivity, and enhance your credibility.

For IT professionals and managers, each certification level, whether an Oracle Certified Associate (OCA), an Oracle Certified Professional (OCP), or an Oracle Certified Master (OCM), signifies a benchmark of experience and expertise recognized for its value and relevance in the IT industry. Today there are over 350,000 Oracle Certified Professionals worldwide.

To learn more about Oracle University, please visit: <http://education.oracle.com> or call +1.800.529.0165.

# Partners

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## Sections

Oracle PartnerNetwork

Types of Partners

License Types

## **Oracle PartnerNetwork**

The Oracle PartnerNetwork (OPN) is fundamental to Oracle's success. Oracle has more than 19,000 partners that help create rich solutions for broader markets, and bring even greater value to customers through solutions that address a broad range of business needs.

Together, Oracle and its partners provide customers around the world with industry-leading solutions and services. When a customer chooses an Oracle-based solution or service from an Oracle partner, they are deploying world-class Oracle products, plus the extended capabilities of a partner that works hand-in-hand with Oracle, and provides for a specific functional area, market, or industry need.

## **Types of Partners**

Oracle partners with a number of solution and service providers including independent software vendors (ISVs), platform partners (e.g., hardware vendors), system integrators (SIs), and value added resellers (VARs). Partners often provide multiple services and solutions that can place them in more than one partner category. Oracle also has Partners in Industry that offer expertise and solutions for specific industry verticals and market segments.

## **Independent Software Vendors**

Independent Software Vendors in the Oracle PartnerNetwork develop applications that are built on, integrate with, or embed Oracle products. Together, Oracle and ISVs meet customers' needs with industry-leading solutions that are powered by Oracle Technology or are tightly linked to Oracle Applications.

**Platform Partners**

Platform Partners in OPN join Oracle to provide solutions that lower the total cost of ownership for customers. Oracle makes it easier than ever for customers to purchase solutions through bundled offers and distribution agreements with our Platform Partners. Oracle also continues to work closely with our partners to maximize the performance of Oracle products on proven platforms.

**System Integrators**

System Integrators in the Oracle PartnerNetwork provide customers consulting, integration, and implementation services for Oracle-based products and solutions. Oracle's SI partners—both the larger consulting companies as well as smaller, specialized firms—bring business process capabilities, industry experience, and solution and market expertise that can help you deploy Oracle-based solutions, maximize functionality, and rapidly achieve return on investment.

**Value Added Resellers**

Value Added Resellers in OPN extend Oracle's ability to reach and provide for customers. We are continually expanding our reseller community so that customers have more purchase options. Oracle is committed to making it easy for VARs to work with us and we provide training, tools, and resources so that they can deliver complete solutions to customers.

**Partners in Industry**

Oracle and its Partners provide joint solutions that offer a complete, integrated, component based architecture designed around the specific needs of the top industries. These solutions provide the ability for your company to solve problems faster, reduce costs, and meet changing market conditions and pressure from competitors.

Specific industries Oracle along with its Partners help support include:

Aerospace and Defense	Industrial Manufacturing
Automotive	Life Sciences
Chemicals	Media and Entertainment
Communications	Natural Resources
Consumer Products	Oil and Gas
Education and Research	Professional Services
Engineering and Construction	Public Sector

Specific industries Oracle along with its Partners help support include (continued):

Financial Services	Retail
Healthcare	Travel and Transportation
High Technology	Utilities

### License Types

A license type determines how Oracle software can be used. The standard license type offered by Oracle is a Full Use license. A Full Use license allows the end user to use the software for development, testing, production, and fail-over use. (A detailed explanation of these license environments is provided in the Technology Products and Application Products sections.)

Oracle Partners may offer Full Use licenses, Application Specific Full Use licenses and/or Embedded licenses.

#### *Application Specific Full Use*

An Application Specific Full Use (ASFU) license is a restricted type of license sold by an Oracle partner in conjunction with a single, defined commercially available application package. The ASFU allows the end user to use the Oracle software solely in conjunction with the partner's defined application for development, testing, production, and fail-over use and cannot be modified for use with any other applications.

If the Oracle partner resells its application package with ASFU licenses, the end user, by paying the appropriate license fee, can upgrade to a Full Use Oracle license to run the partner's application instead of the ASFU licenses.

#### *Embedded Software License*

An Embedded Software License (ESL) is a restricted type of license sold by an Oracle partner when the Oracle software is embedded in the solution provider's application package. Embedded licenses may be used by the end user only to execute the partner's single, defined, commercially available application program. Embedded Software Licenses may not be used with more than one application package.

Since a condition of reselling an ESL is to fully integrate the Oracle programs with the application package of an ESL partner, these licenses are neither upgradeable to Full Use or Application Specific Full Use licenses, nor are they migratable to other

license metrics. Additionally, an Oracle sublicense must be sold with each application package license, regardless of whether the end user already owns other Oracle licenses.

Please refer to the terms and conditions of your ASFU or ESL license for details of exact rights granted under these license levels.

Oracle software licenses acquired through Oracle partners may be supported by the partner or directly by Oracle, based on the license type and the specific relationship between the partner and Oracle.

To learn more about Oracle Partners, please visit [www.oracle.com/partners](http://www.oracle.com/partners) or call +1.800.323.7355.



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# Leveraging Your Oracle Investment

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## Sections

Overview

Supported Product Migrations

License Migrations

License Upgrade

## **Overview**

Oracle's pricing and licensing models are designed to reflect the value users receive from our software and services. As technology evolves over time, accordingly, pricing and licensing models will as well. Oracle makes every effort to minimize this impact on our customers and their existing software investment.

In many cases, however, it will be advantageous for you to migrate to new products with new pricing and licensing. Business models change over time as different processes and functions become more automated with new technologies. Hardware configurations also change to maximize advancement in these new technologies. Accordingly, software also needs to be kept up-to-date. The business needs you are supporting today with your current IT infrastructure may be very different from when you originally purchased your software licenses, which is why you may need new products and/or different licenses.

To facilitate the process of keeping your software licenses aligned with your business needs, Oracle has created standard Migration and Upgrade Policies. These policies can seem very complex when viewed from the perspective of a single customer, but they are designed to accommodate the different types of licenses Oracle has offered over its entire corporate history. Not every aspect of these policies will apply to every customer. The purpose of this section is to provide you with a high level understanding of the basic components of Oracle's Migration and Upgrade Policies.

## *Types of Migrations*

Software may be updated in three different ways: (i) a supported product migration, (ii) a license migration, or (iii) a license upgrade. Depending on your current configuration and how your business needs have evolved, you may require any

combination of the three to bring your licenses up to date.

### **Supported Product Migrations**

Supported product migrations are made available through Oracle's Technical Support organization and allow customers with Software Updates License & Support to stay current on Oracle's latest technology. In a supported product migration, the customer receives an update to an older product as described in Oracle's Technical Support Policies.

In some cases, use of the update will be limited to functionality included in the older product, unless the customer simultaneously undertakes a license migration with the supported product migration. As a supported customer, when you request a product update, you will want to consult the Supported Product Migration list to determine how to use the update appropriately. If the Supported Product Migration list does not specify any limitations on the update, then supported customers who receive the update are entitled to use its full functionality.

Also, please note that to facilitate shipping and minimize the number of DVDs a customer has to track and manage, Oracle combines many different software products on DVDs in a media pack. The DVDs you receive as an update in a supported product migration may include software or functionality you are not licensed to use. Receipt of the CD does not constitute authorization to use the unlicensed software or functionality.

Importantly, the exercise of a supported migration does not result in a relicensing of the programs, or change your license rights. It does not require modifications to your license agreement or your ordering document, or result in new license or support fees.

### **License Migrations**

License migrations enable customers to modify their existing software licenses to benefit from Oracle's current licensing metrics, which best reflect the current state of technology, software use, and hardware configurations. Over time, Oracle's licensing models have become less restrictive. For example, ten years ago, our licenses were restricted to use on a single computer of a specified platform. To move the licenses to a different platform, or to use them on more than one computer, required additional license fees. Today, with a few exceptions, an Oracle

license allows you to freely move your software from platform to platform and to run it in a networked environment.

Oracle has created standard rules for license migrations that apply to all licenses purchased prior to June 15, 2001. (Licenses purchased on or after June 15, 2001 may not be migrated. However, they may be upgraded as described below.) Depending on the product and licenses involved, the migration may be handled using a standard ratio (e.g., 1 Concurrent Devices = 2 Named User Plus) or on a net-net basis. In a net-net migration, the customer receives a credit for the net license fees paid for the original licenses that may be applied against the net license fees due for the migrated licenses. In both cases, support is calculated based on the customer's existing support configuration and the current price of support for the migrated licenses.

License migrations result in new licenses, a new ordering document (called the Migration Ordering Document), and may require the payment of additional license and technical support fees. The new fees reflect the additional value received from the new licenses and support.

### **License Upgrade**

A license upgrade involves the replacement of a more restrictive license with a less restrictive one. Some Oracle customers may have Deployment, Application Specific, Web-Specific, or other limited licenses for various Oracle programs. These licenses can be upgraded to more robust Full Use licenses under Oracle's standard upgrade policies. Likewise, customers may upgrade from more limited to less limited products within certain product sets. For example, a customer might upgrade from Oracle 9i Standard Edition to Oracle 9i Enterprise Edition, Oracle 9i Standard Edition One to Oracle 9i Standard Edition or Oracle 9i Enterprise Edition, or from applications licensed on a component basis to the Oracle E-Business Suite.

Oracle has created standard rules for license upgrades. Depending on the products and licenses involved, the upgrade may be priced based on the difference in the current list prices for the old and upgraded licenses, or on a net-net basis. In a net-net upgrade of licenses originally purchased from Oracle, the customer receives a credit for the net license fees paid for the original licenses being upgraded that may be applied against the net license fees due for the upgraded licenses. In addition, for some products an additional upgrade fee may be charged. In all cases,

support is calculated based on the customer's existing support configuration and the current price of support for the upgraded licenses.

License upgrades result in new licenses, a new ordering document (called the Migration Ordering Document), and will require the payment of additional license and technical support fees. The additional fees reflect the additional functionality acquired through the license and support upgrade.

To learn more about Oracle Support Services, please visit: [www.oracle.com/support](http://www.oracle.com/support) or call +1.800.833.3536.

To learn more about Oracle Technical Support Policies, please visit: [www.oracle.com/support/policies.html](http://www.oracle.com/support/policies.html)

## Need More Help?

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Oracle Corporation (Nasdaq: ORCL) is the world's largest enterprise software company, providing enterprise software to the world's largest and most successful businesses. With annual revenues of more than USD \$16 billion, the company offers its database, middleware and application products, along with related consulting, outsourcing, education, and support services. Headquartered in Redwood Shores, California, Oracle is the first software company to develop and deploy 100 percent internet-enabled enterprise software across its entire product line.

Want to reach a specific group at Oracle? Feel free to contact us by calling one of the numbers listed below. Or click on the appropriate department to send an e-mail or to visit their site.

### Products

- [U.S. Sales](#) : Product Information and Literature / 1-800-ORACLE-1
- [Oracle Store](#) : Online Sales
- [U.S. Documentation Sales](#) : 1-800-252-0303
- [Trial CDs](#) : Limited Product Set / 1-800-633-0586
- [Oracle Technology Network](#) : Contact information

### Services

- [Support Sales](#) : 1-800-833-3536
- [U.S. World Wide Support](#) : Supported Customers / 1-719-635-8900
- [Oracle University/Oracle Certified Professional Program](#) : Oracle University  
Regional Contacts
- [Oracle Consulting](#) : 1-888-283-0591
- [Oracle OnDemand](#) : Technology and E-Business Suite OnDemand

**Worldwide Sales**

- Asia Pacific (Singapore) : +65.333.8816
- Europe (Switzerland) : +41.22.799.9900
- Middle East (Dubai) : +971.4.390.9000
- Africa (Toll Free) : +1850 ORACLE

**Worldwide Support**

- [Canada](#) : +1.800.668.8921 or +1.905.890.6690
- [Latin America](#) : 877-767-2253 via AT&T Direct conectar
- [Asia Pacific](#) : +61.132.370
- [Europe, Middle East, Africa](#) : +44.870.4000.900

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