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Working Effectively with Oracle Support

\<presenter name\>
Customer Support Manager (CSM)
Outbound Team

Agenda

- Support Terminology

- Oracle*MetaLink*

- Support Tools

- Working Effectively with Support

- Escalations

- Summary

- Quick Reference
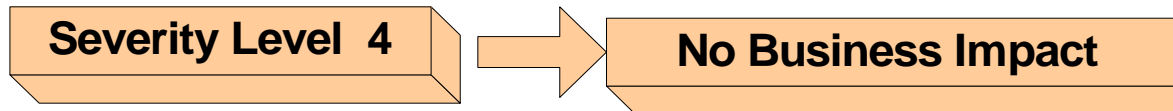
- Q&A

Support Terminology & Tools

- Support Acronyms and Terminology
  - CSI number
  - Service Request Number and Severity Definitions
  - Service Request Status Codes
  - Oracle*MetaLink*
  - Diagnostic Tests
  - Configuration Support Manager (CSM)
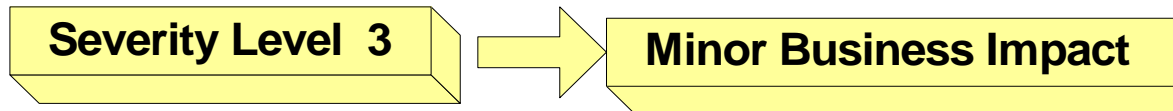 - Oracle Collaborative Support (OCS)

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CSI Numbers

Your Key to Accessing Oracle Support

- What is a CSI Number?
  - Customer Support Identifier
  - Used to Verify Eligibility for Support Services
  - Identifies your licensed products
  - Necessary to access *MetaLink*

- CSI / *MetaLink* Customer User Administrator (UA)
  - Customer is responsible for maintaining CSI
  - Each CSI must be assigned at least one UA
    - Multiple UA's are advised for backup purposes
  - Provides Control over your Company's *MetaLink* access
  - Enhances Security

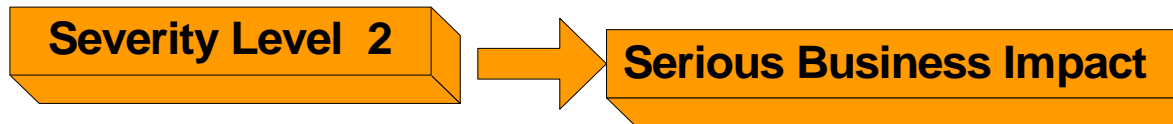- CSI Migrations
  - Do not delete migrated CSI's from *MetaLink*

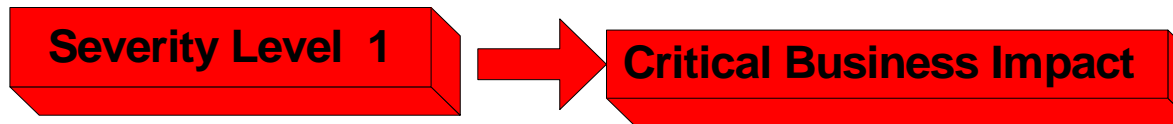ORACLE®

Service Request Severity Definitions

| Severity Level 4 | → | No Business Impact |

No loss of service or resources

| Severity Level 3 | → | Minor Business Impact |

Minor loss of service or resources

| Severity Level 2 | → | Serious Business Impact |

Severe loss of service or resources w/o acceptable workaround

| Severity Level 1 | → | Critical Business Impact |

Complete loss of service or resources and work cannot
reasonably continue - the work is considered "mission critical"

SR Status Codes

Support:
- **NEW** — New SR
- **ASG** — Assigned to a Support Engineer
- **WIP** — Work In Progress
- **RVW** — Review
- **1CB** — 1st Callback
- **2CB** — 2nd Callback
- **IRR** — Immediate Response Required
- **INT** — Awaiting Internal Response

Customer:
- **WCP** — Waiting for Customer to apply Patch
- **CUS** — Waiting on Customer
- **LMS** — Left Message

Closed Status:
- **SCL** — Soft Close
- **HCL** — Hard Close

Development:
- **DEV** — Assigned to Development

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SCL vs. HCL

- SCL
    - An inactive Status used when a solution is provided
    - Can still be updated by the customer
    - Does not signify that you are in agreement that the issue is resolved
    - Changes automatically to HCL in 14 Days
- HCL
    - Final Status – SR cannot be updated
    - Ask Support Engineer to extend SCL default period if you need additional time before SR moves over to HCL status

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Oracle*MetaLink*

metalink.oracle.com

Oracle*MetaLink*

- A web application that provides access to:
  - Technical information and solutions
  - Patches
  - Bugs
  - Support Engineers
  - Other users in the Oracle Community
- Benefits of MetaLink
  - Repository of technical articles
  - Diagnostic tests
  - Interactive Forum
  - SR Access
  - Personalized home page
  - 24 x 7 access

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Diagnostic Tools
Gathers Detailed Information About Oracle Environment

- Server
  - Remote Diagnostic Agent
  - Ora-600 Lookup Utility
  - 300+ DBA Scripts
  - Health Check / Validation Engine Rule Sets
- Applications
  - Diagnostics Support Pack
  - 175+ Diagnostic Tests for the E-Business Suite

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Oracle Collaborative Support (OCS)

- Faster Resolution Time
  - On Demand connection
  - Instant online collaboration
  - Customer access to scripts, tools and instruments
  - Join via MetaLink
- Expectations
  - Used for observation, validation, and problem verification
  - Engineers will not start a session to install or train on the product, nor demonstrate product functionality
  - Web Conferences typically last no longer than 20 minutes

Configuration Support Manager

Feature:

A powerful tool that automates the information exchange between Oracle and your customer's enterprise.

Value:

• Proactive avoidance of problems

• Simplified Service Request submission

• "One-Click" tracking of Service Requests

• Detailed configuration and settings view with history

• Streamlined problem resolution

• Improved communication of your business needs

Working Effectively with Support

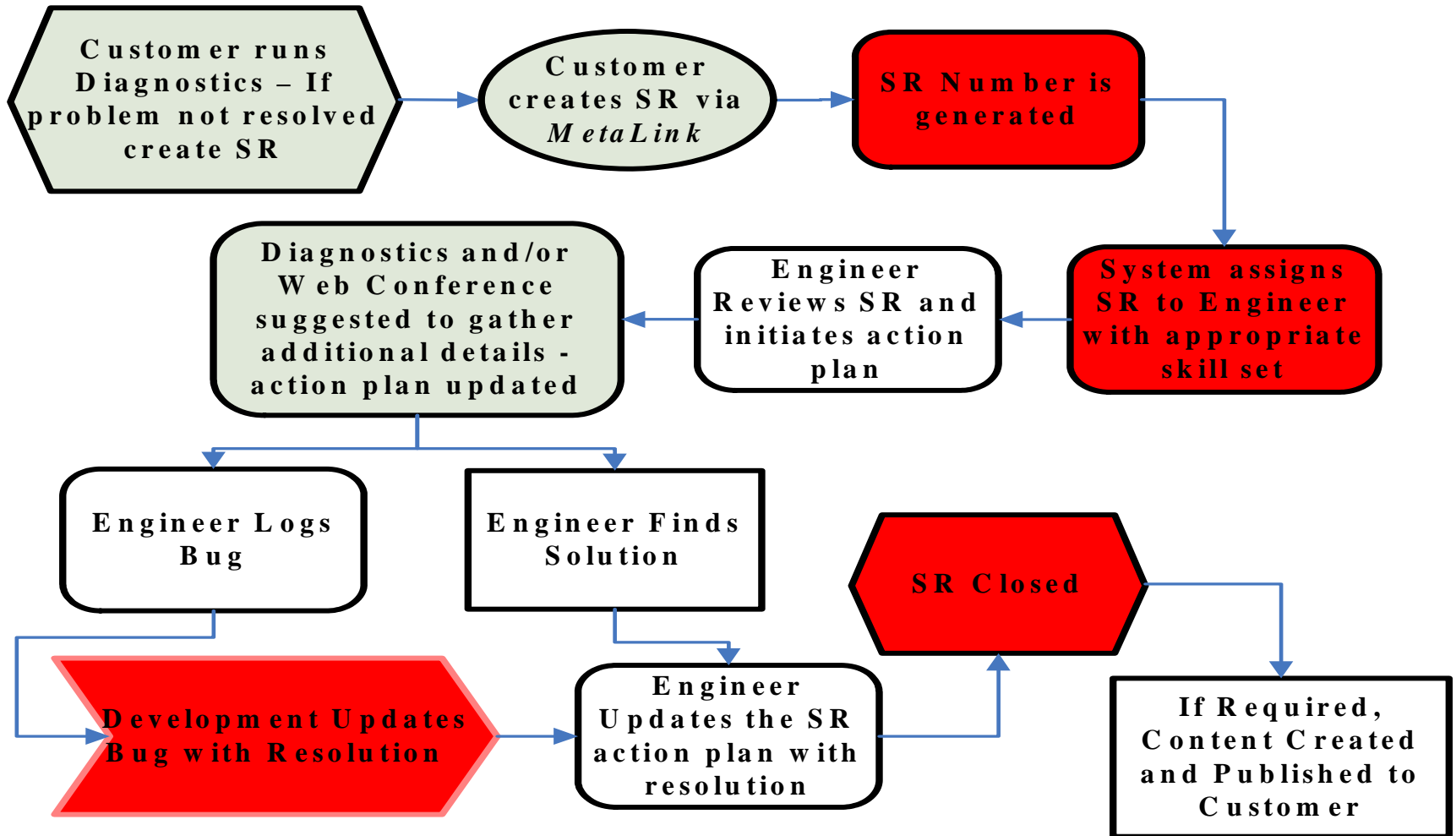# What does a Support Engineer Do?

- Works a queue of current customer issues in a variety of statuses

- Provides resolutions and / or workarounds

- Responds to new incoming SRs

- Uses Oracle's Diagnostic Methodology for troubleshooting

- Acts as liaison between customer and development

- Contributes to knowledge base content in MetaLink

- Does not replace education or consulting

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SR Process

Customer runs Diagnostics – If problem not resolved create SR → **Customer creates SR via *MetaLink*** → **SR Number is generated**

SR Number is generated → **System assigns SR to Engineer with appropriate skill set**

System assigns SR to Engineer with appropriate skill set → **Engineer Reviews SR and initiates action plan** → **Diagnostics and/or Web Conference suggested to gather additional details - action plan updated**

Diagnostics and/or Web Conference suggested to gather additional details - action plan updated → **Engineer Logs Bug**

Diagnostics and/or Web Conference suggested to gather additional details - action plan updated → **Engineer Finds Solution**

Engineer Logs Bug → **Development Updates Bug with Resolution** → **Engineer Updates the SR action plan with resolution**

Engineer Finds Solution → **Engineer Updates the SR action plan with resolution**

Engineer Updates the SR action plan with resolution → **SR Closed** → **If Required, Content Created and Published to Customer**

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Best Practices

- Lesson's learned from our customers….
  - Shared ownership in resolving the issue
  - Quality and quantity of communication
  - Joint Planning on problem resolution

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Each Environment is Unique

- Test solutions before introducing them into your production environment

- The data, software and hardware configurations, patch combinations, and integration points are different for every customer

- We depend on our customers to manage their environments and help us understand them

- Customers control the quality and quantity of information about their environment

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Communicating the Issue

- Clear problem statement: Cause and Effect
    - All known facts
    - Is the issue reproducible?
    - Detailed history of environment and changes
- Answer all template questions
- Review our knowledge base on MetaLink
    - Knowledge Browser
    - Forums
- Contact Support – SR
- Ensure that the impact of the issue is well understood
    - Maintain a system log book to track changes, customizations, manage patches and patch testing

Successful Communication

- Documentation is essential
  - Answer all questions
  - Action plans after each update and define who owns each action
  - Minimize SR 'tag' or 'pinging' by ensuring you provide what is requested or a thorough explanation of why it could not be provided.
- Monitor changes in SR status and severity
- Escalate concerns via the escalation process

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Escalations

Bringing Management Attention to your Service Request

Raising Severity vs. Escalations

Customers believe that Severity 1 issues or increases in Severity are Escalations – this is <u>not correct</u>. Escalating an issue means bringing management attention to your Service Request and when appropriate more resources. This direct, 2-way dialogue with a Manager in Support is where the next action plan will come from. Severity increases will be discussed during this dialogue.

If the severity level of the SR becomes inappropriate over time, it may be raised by mutual agreement between the Oracle Support Engineer and the Customer.

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Escalations

- Encounter critical roadblocks

- Communicate Business issues to managers within Oracle Support

- Dissatisfied with resolution or response

- Escalate issues in a timely manner

- Quality of escalation criteria is key:

    - Project deadlines?

    - Lost Revenue?

    - Government reporting?

    - Users at your door?

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Escalation Process

Call US: 800 223 1711
Other Global Support Hot Lines:
http://www.oracle.com/support/contact.html

V.P. or
Executive

Senior Manager
or Director

Manager /
Escalation Manager

Support Representative

Customer
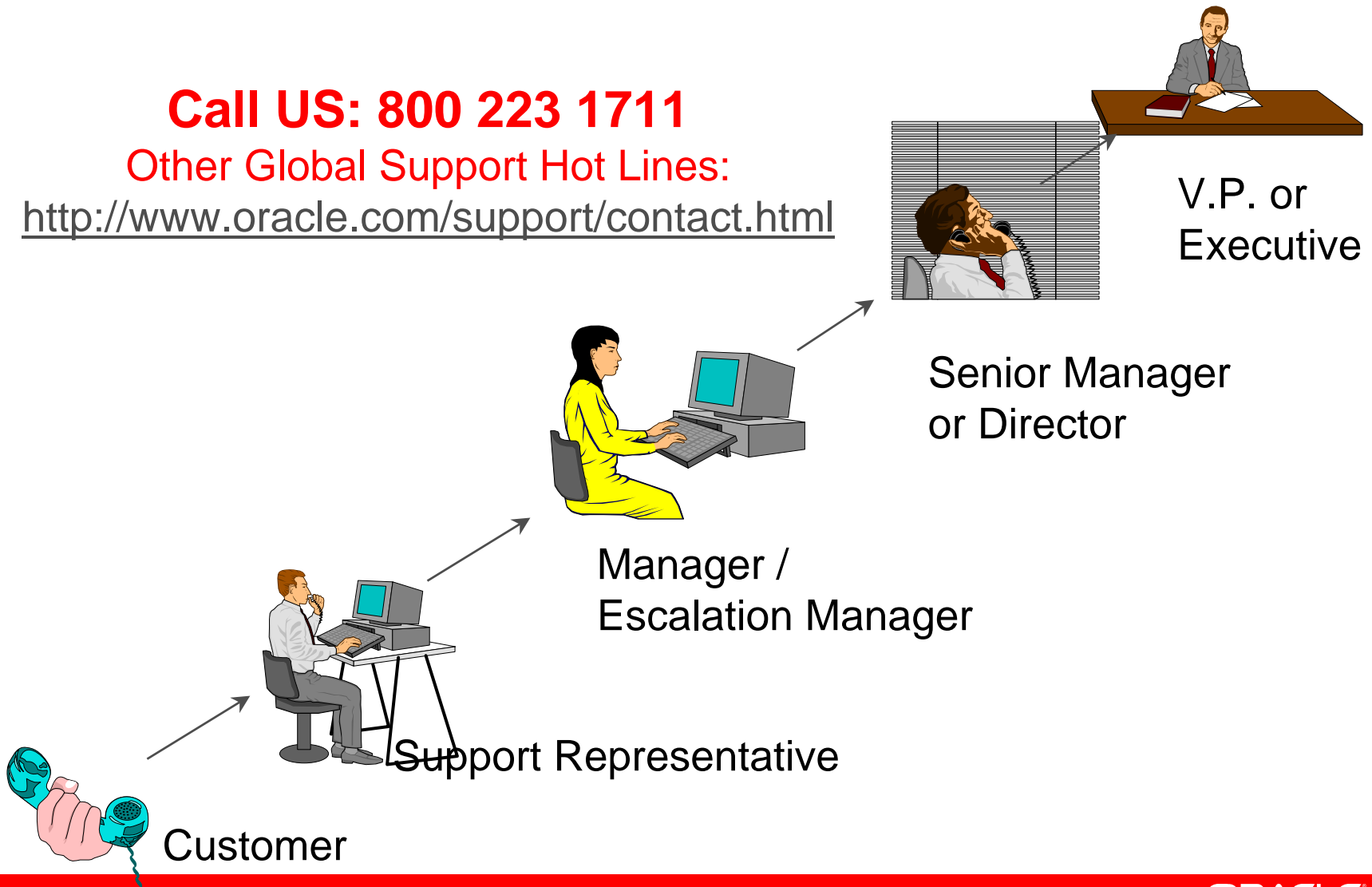
Oracle Support Services

oracle.com/support

Summary

- Understand support terminology

- Know severity level definitions

- Access MetaLink!!

- Run Diagnostic Tests

- Use Oracle Collaborative Support

- Set up Configuration Support Manager (CSM)

- Communicate the issue effectively

- Implement the escalation process when necessary

Quick Reference

- **MetaLink** - http://metalink.oracle.com/

  - RDA Info – Doc ID: 314422.1

  - Diagnostic Tools Catalog - 232116.1

  - Escalation Process – Doc ID: 199389.1

- **Oracle Technical Support Policies:**

  - http://www.oracle.com/support/policies.html

  - Download PDF for information regarding Support Terms, Support Levels, and Severity Definitions

- **OCS Website:** conference.oracle.com

  - Quick Tutorial – located in the Quicklinks box on the right

Process and Tools Seminars

http://www.oracle.com/support/seminars.html

Some of our more popular Internet seminars include:

☒ **Working Effectively with Support**
Learn how to save time and work effectively with Oracle Support. Obtain details on leveraging your support investment and customer best practices. Understand support terminology, tools, and the escalation process.

☒ **Introduction to *MetaLink***
Attend a live demo showing the various features available in *MetaLink*. Learn how to log a Service Request (SR) and how to have an SR, a patch or other important news sent to you automatically by email.

☒ **Advanced *MetaLink***
Attend our Advanced *MetaLink* Seminar and learn from the experts how to exploit the Search and Advanced Search functions, how to use the Knowledge Browser, how to setup *My Configurations and Projects*, how the User Administrator functions work, and much more.

☒ ***MetaLink: My Configurations & Projects***
This seminar helps you learn how to use *My Configurations and Projects* effectively to create and manage configurations, manage projects around those configurations, run HealthChecks, and save time logging and resolving Service Requests.

☒ **Support Diagnostic for E-Business Suite 11*i* - Basic:** This seminar will give you an opportunity to learn all the details about Support Diagnostics for E-Business Suite 11*i*, including a live demonstration using real examples. This 90-minute Basic seminar is the first in a series and is directed towards E-Business Suite 11*i* users who log Service Requests with Support, but all attendees are welcome.

☒ **Support Diagnostic for E-Business Suite 11*i* - Advanced:** This seminar will give you an opportunity to learn the details on how to install, execute, and troubleshoot issues using Support Diagnostics for E-Business Suite 11*i*. This 90-minute Advanced seminar is the second in a series and is directed to E-Business Suite 11*i* DBAs. This demo will be technical in nature and directed to DBAs who will be installing and maintaining Support Diagnostics. Functional users are welcome to attend but may find the Basic seminar to be sufficient.

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Oracle Advisor Webcasts
Now Available Through MetaLink

- A new way to receive information about your Oracle E-Business Suite solutions

- This program began with PeopleSoft and has now been expanded to include Oracle EBS and ST customers

- Go to MetaLink Note <u>398877.1</u> - *Welcome to the Oracle Advisor Webcast Program!*

  - Includes links to the Advisor Webcast page

  - Instructions for registering and viewing both live and archived webcasts

  - The current menu of scheduled webcasts to choose from

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CSM Outbound Team

Delivery Options

- One-on-One Customer meetings and Webcasts
- Support Webcasts – targeting a core Customer audience
- Regularly scheduled free Internet Seminars
- Regional Support Education Workshops
- User Groups, SIGs, RUGs, etc.

Value to you

Following attendance at one of our presentations, Customers have experienced, on average:

- Up to a 40% reduction in volume of new Service Requests
- As much as a 70% reduction in issues requiring further escalation
- A 10% increase in overall Customer Satisfaction

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CSM Outbound Team

Contact us via the email addresses below, or contact a member of the CSM Outbound Team directly

- External email:
    - North America:
        - support-training_us@oracle.com
    - Latin America
        - support-training_br@oracle.com

Partner SMART

- **Partner-specific training path**
- **Many recorded training sessions already available**
- **A new topic covered each month**
  - **Example sessions include:**
  - **Apps Diagnostics, Maintenance Wizard, RDA, Change Assistant, Performance Monitor, etc.**
- **For more information:**
  - **Log into OPN (http://oraclepartnernetwork.oracle.com)**
  - **Click on SUPPORT (Left hand column)**
  - **Look under Get Trained**

Thank You !