



ORACLE®

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

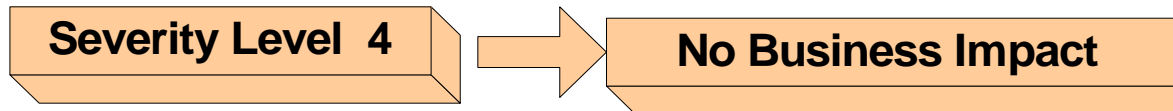
- Support Acronyms and Terminology
 - CSI number
 - Service Request Number and Severity Definitions
 - Service Request Status Codes
 - Oracle*MetaLink*
 - Diagnostic Tests
 - Configuration Support Manager (CSM)
 - Oracle Collaborative Support (OCS)

CSI Numbers

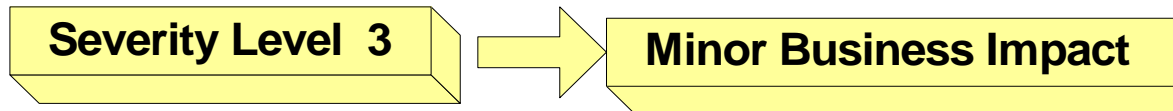
Your Key to Accessing Oracle Support

- **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*

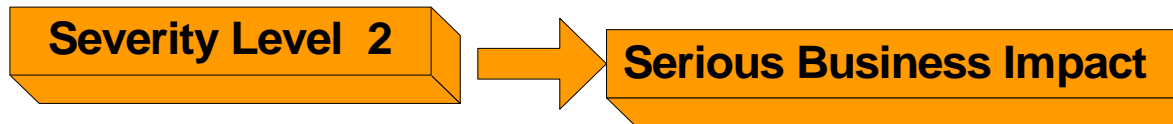
Service Request Severity Definitions



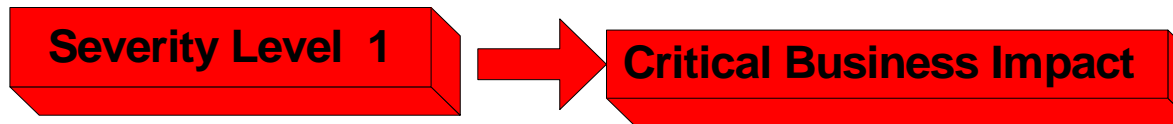
No loss of service or resources



Minor loss of service or resources



Severe loss of service or resources w/o acceptable workaround



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

SR Status Codes

Support:	<ul style="list-style-type: none">• NEW• ASG• WIP• RVW• 1CB• 2CB• IRR• INT	<p>New SR</p> <p>Assigned to a Support Engineer</p> <p>Work In Progress</p> <p>Review</p> <p>1st Callback</p> <p>2nd Callback</p> <p>Immediate Response Required</p> <p>Awaiting Internal Response</p>
Customer:	<ul style="list-style-type: none">• WCP• CUS• LMS	<p>Waiting for Customer to apply Patch</p> <p>Waiting on Customer</p> <p>Left Message</p>
Closed Status:	<ul style="list-style-type: none">• SCL• HCL	<p>Soft Close</p> <p>Hard Close</p>
Development:	<ul style="list-style-type: none">• DEV	<p>Assigned to Development</p>

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

Oracle MetaLink

metalink.oracle.com

ORACLE MetaLink [Bookmarks](#) [Admin](#) [Profile](#) [Feedback](#) [Sign Out](#) [Help](#)

Headlines Knowledge Service Request My Configs & Projects Patches & Updates Forums Certify

Headlines Oracle News & Events E-Business 11i

Quick Find Knowledge Base [Advanced](#) [Saved Searches](#)

Technical Forums Knowledge Base Bug Database Certify & Availability Service Requests

Headlines for Metalink Demo Purposes Only

News & Notes

Article	Last Updated	Status
Important Changes Coming For Your MetaLink Login ID - Please Read	19-APR-2006	Updated
Attend the Advanced MetaLink Seminar: May 10, 2006	18-APR-2006	Updated
Attend the Introduction to MetaLink Seminar May 4, 2006	18-APR-2006	Updated

Technical Forums

[Top](#)

Forum Name	Subject	Last Updated	Status
Oracle Human Resources	Re : Use of Audit Trail in Oracle HR 11.5.10	20-APR-2006	Updated
Oracle Human Resources	Re : Elements to collect hours and Elements to claim hours.	20-APR-2006	Updated
Oracle Human Resources	Re : Absence maintenance	20-APR-2006	Updated

Knowledge Base

[Top](#)

Doc Id	Title	Platform	Product	Last Update Date	Status
365387.1	On Germany legislation, Statutory Information tab on Assignment form displays wrong fields when reopened	All Platforms	Oracle Human Resources	20-APR-2006	Updated

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

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

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



The screenshot displays the Oracle Configuration Support Manager interface. At the top, there is a navigation bar with tabs for 'Headlines', 'Knowledge', 'Service Request', 'My Configs & Projects', 'Patches & Updates', 'Forums', and 'Certify'. Below the navigation bar, there is a search bar with the text 'Quick Find Knowledge Base' and a 'Go' button. The main content area is titled 'My Configurations and Projects' and contains several sections: 'My Favorite Configurations', 'My Favorite Projects', and 'My Favorite Configurations'. The 'My Favorite Configurations' section contains a table with the following data:

Configuration Name	Description	Configuration Type	Organization	Permission	SRS	Remove
PAA_bvok.us.oracle.com_DB		Production	FRED STAHL MARKET RESEARCH			
VIS_warblade.us.oracle.com_DB	Phila Production DB	Production	FRED STAHL MARKET RESEARCH			
VIS_warblade.us.oracle.com_EBS	Phila Production AR	Development	FRED STAHL MARKET RESEARCH			

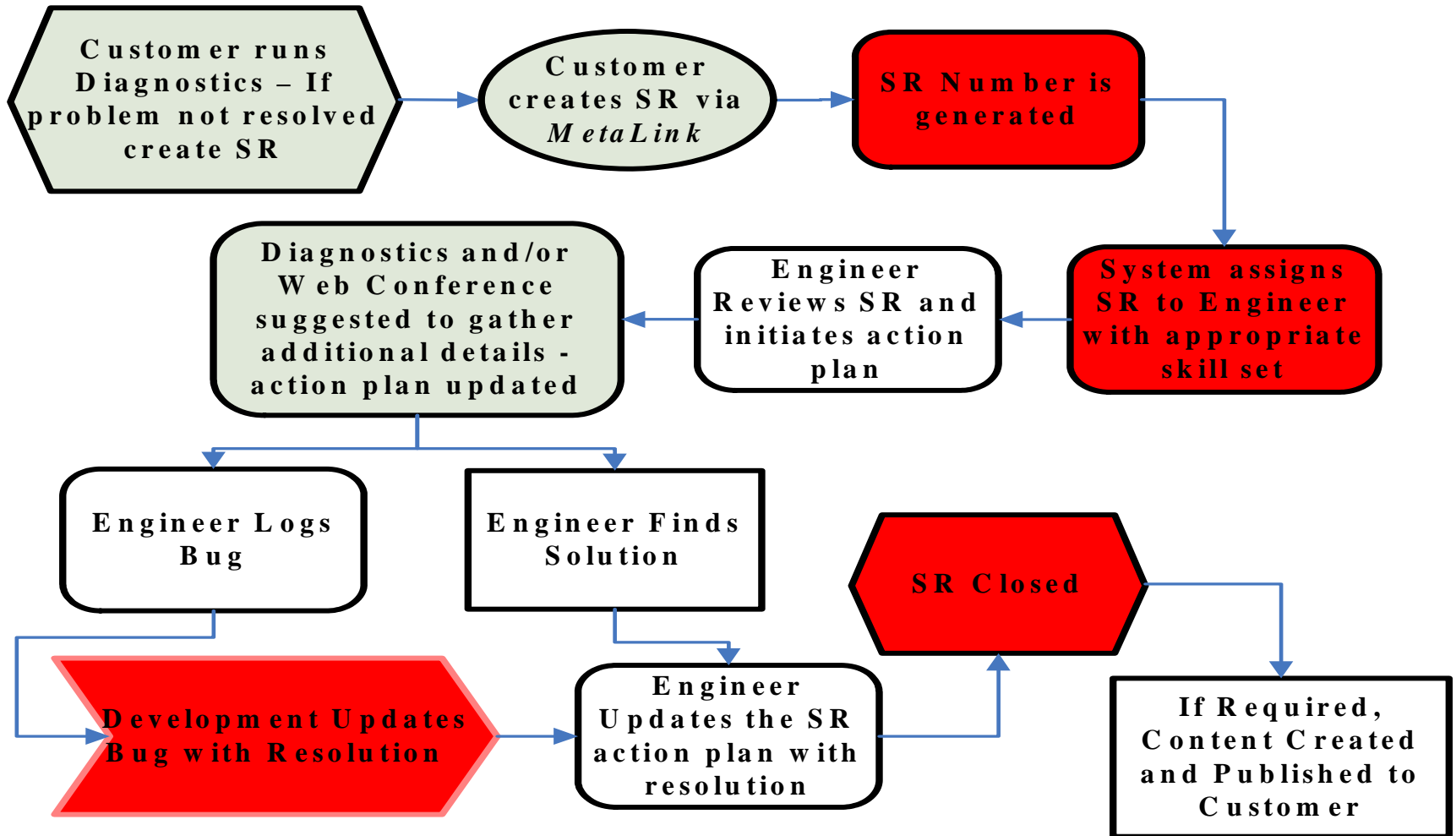
Working Effectively with Support



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

SR Process



Best Practices

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

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

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

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 not correct. 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.

Escalations

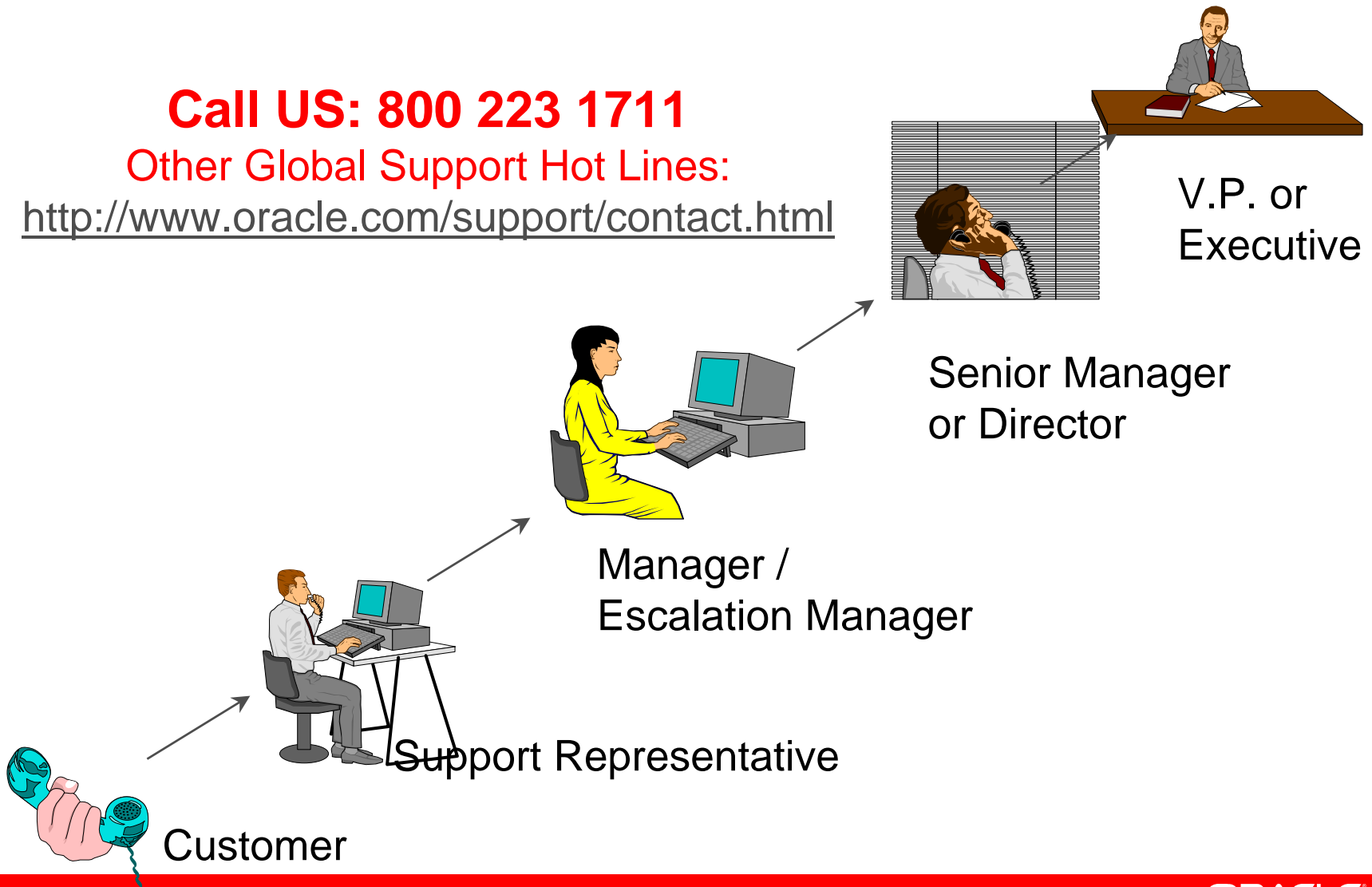
- Encounter critical roadblocks
- Communicate Business issues to managers within Oracle Support
- Dissatisfied with resolution or response
- Escalate issues in a timely manner
- Quality of escalation criteria is key:
 - Project deadlines?
 - Lost Revenue?
 - Government reporting?
 - Users at your door?

Escalation Process

Call US: 800 223 1711


Other Global Support Hot Lines:

<http://www.oracle.com/support/contact.html>




Oracle Support Services

oracle.com/support

(Sign In / Register for a free Oracle Web account)

TECHNOLOGY PRODUCTS
APPLICATION PRODUCTS
FUSION APPLICATIONS
ORACLE SERVICES

EVALUATE

- Support Home 
- Premier Support
- Awards
- Support News
- Resource Library


IMPLEMENT

- Advanced Customer Services
- Oracle On Demand
- Purchase or Renew


USE

- Oracle Support Resources
- PeopleSoft Support Resources
- Acquired Product Support
- Contact Support
- Support Policies

CUSTOMERS | PARTNERS
ORACLE CORPORATION


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Worldwide Sites 

Oracle Premier Support—Expect Next-Generation Support

Unlocking the Power of Your Oracle Solutions



Oracle Premier Support can help 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 can help you optimize your systems for availability and performance. And our commitment to product innovation secures your technology future, helping you fully benefit from product enhancements and verifying that your systems are always up-to-date, secure, and operating at peak performance.

Oracle Premier Support

- Lifetime Support Policy**
Oracle's comprehensive and flexible Lifetime Support Policy covers your entire technology stack, from database to middleware to applications
- Product Enhancements**
Adopt the latest technologies, best practices, and industry processes that drive your success
- Advanced Support Technologies**
automate the labor-intensive processes required to maintain enterprise applications and technology products
- Global Support**
No matter where are or when you need assistance, Oracle Premier Support has you covered
- Technology Leadership**
Oracle's thirty-year commitment to research and innovation means your systems will always be ready for new technology

J.D. Power and Associates Global Certified Technology Service and Support Certification

Oracle is the first enterprise software provider to receive [global certification](#) under the J.D. Power and Associates Certified Technology Service & Support Program for our worldwide support business, encompassing 17 hubs on 5 continents. J.D. Power and Associates certification programs help consumers identify those product and service providers that deliver "An Outstanding Customer Service Experience".

Contact


- [MetaLink Login](#)
- [PeopleSoft Customer Connection Login](#)
- [Contact Support Now](#)
- [Acquired Products Support](#)

Buy

- [Purchase or Renew Premier Support](#)
- [Technical Risks of Third-Party Support](#)
- [Oracle Pricing and Licensing](#)

Call 1-800-633-0615
or have **Oracle Call You**

Customer Spotlight



Axiom
"The proactive nature of Oracle Support is an asset in keeping our systems running at peak"

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 11i - Basic:** This seminar will give you an opportunity to learn all the details about Support Diagnostics for E-Business Suite 11i, 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 11i users who log Service Requests with Support, but all attendees are welcome.
- ❑ **Support Diagnostic for E-Business Suite 11i - 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 11i. This 90-minute Advanced seminar is the second in a series and is directed to E-Business Suite 11i 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.

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 [398877.1](#) - *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

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

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**



ORA

Thank You !