

Customer Quick Reference Guide

For Oracle Technology and Oracle E-Business Suite Customers

Expect Industry-Leading Support

Keep Your Business Moving Forward with Oracle Premier Support

Drive more value from your Oracle technology and applications. Gain greater control of your technology future with rights to major upgrades and releases. Benefit from trusted expertise with direct access to our support engineers. Increase your IT efficiency with minimized risk. Oracle Premier Support will help drive your competitive advantage with

- **Product Enhancements and Updates.** With rights to future product releases and updates, you benefit from broader coverage for your entire technology stack. You get access to ongoing innovation through world-class research and development to help drive your business forward.
- **Global Support Infrastructure.** Oracle has the breadth and global infrastructure you need. Access in-depth Oracle expertise for accurate diagnosis, swift resolution, and the highest system availability.
- **Proactive, Automated Support.** You benefit from the most-advanced support tools in the industry, delivering faster problem resolution, optimized system performance, and a lower cost of maintaining your Oracle systems.
- **Lifetime Support.** Leading the industry, our simple and predictable Lifetime Support Policy covers your entire technology stack from database, to middleware, to applications, and puts you in control of your upgrade strategy.
- **Ecosystem Support.** Get end-to-end lifecycle support that embraces your entire Oracle ecosystem. Benefit from dramatically reduced complexity, risks, and costs of maintaining your multivendor environment.

This quick reference guide will help you find the answers you need, when you need them.

Important Global Customer Support Contact Information

Expect support any time: Resolve issues online immediately with Oracle *MetaLink*, the Web support tool that's available 24/7 at metalink.oracle.com

Useful Oracle Contact Information

Global Customer Support*: +1.800.223.1711
 Support Sales*: +1.800.833.3536
 Oracle Sales*: +1.800.ORACLE1
 Oracle PartnerNetwork*: +1.800.323.7355
 Oracle Consulting*: +1.800.633.0615
 Advanced Customer Services*: ACSinfo_us@oracle.com
 Oracle University*: +1.800.633.0575
 Independent Oracle Users Group (IOUG): +1.312.245.1579
 Oracle Applications Users Group (OAUG): +1.404.240.0897
 Oracle Magazine Subscriptions: +1.847.763.9635

*Region-specific contact information can be found by accessing the corresponding Web site listed in the "Useful Oracle Web Sites" section, below.

Useful Oracle Web Sites

Oracle Home Page: oracle.com
 Global Customer Support (GCS): oracle.com/support
 Oracle Lifetime Support Policy: oracle.com/support/premier/lifetime-support-policy.html
 Oracle GCS Contacts Directory: oracle.com/support/contact.html
 Web-Based Customer Support (Oracle *MetaLink*): metalink.oracle.com
 Oracle Collaborative Support: conference.oracle.com
 Oracle Store (Sales): oraclestore.oracle.com
 Oracle PartnerNetwork: oracle.com/partnerships/index.html
 Oracle Consulting: oracle.com/consulting
 Advanced Customer Services: oracle.com/support/advanced-customer-services/index.html
 Oracle University: oracle.com/education
 Independent Oracle Users Group (IOUG): ioug.org
 Oracle Development Tools User Group (ODTUG): odtug.com
 Oracle Applications Users Group (OAUG): oaug.org
 Oracle OpenWorld: oracle.com/openworld
 Oracle Magazine: oramag.com

Essential Resources

Oracle *MetaLink*

Oracle *MetaLink* is your single point of entry to online technical information and allows you to access Global Customer Support (GCS), formerly known as Oracle Support Services. It is

- Your portal to our global knowledgebase, complete with answers to known problems. It includes product alerts, desupport notices, step-by-step installation instructions, white papers, product documentation, service requests (SRs), forums, patches, bug queries, and more.
- The tool used to facilitate and track communication between you and our engineers. You can initiate requests for help, track progress, read recommendations from your engineer, and run reports of SR activity.

It's recommended that you log a service request on Oracle *MetaLink* for all issues. The severity will be determined by the system, based on your answers to a series of questions. Severity 1 SRs require a 24/7 commitment from the customer.

Online Support

To get started, log in to Oracle *MetaLink* at metalink.oracle.com or oracle.com/support to

- Create new service requests
- Manage existing SRs
- Download patches
- Search for solutions
- Use the interactive forums
- Create a personalized home page

NOTE: If you are a new customer, select the "First Time Users Register For Oracle *MetaLink*" option to obtain an account. Use your active customer support identification (CSI) number to complete the brief online registration process. Once you log in to Oracle *MetaLink*, you can then go to [Profile > Licenses](#) to add additional support identifiers for the products you are working with.

Global Customer Care

Global Customer Care handles all nontechnical issues, connecting customers with information and responding to service-related inquiries. Plus, if you are uncertain whom to contact for your request, Global Customer Care is happy to assist.

To contact the Global Customer Care office, locate your local support hotline number in this directory: oracle.com/support/contact.html

Working Effectively with Global Customer Support

Things You Need to Know

The customer support identification number (CSI) or "support identifier," references your support maintenance level, its duration, and all other information relevant to the technical contact, such as installed-at location, billing address, licenses, and platform. Without a valid, supported CSI number, Oracle cannot provide support.

A service request (SR) is a request by a supported client for help with a technical or nontechnical problem (formerly called TAR, technical assistance request). Each SR is assigned a unique tracking number.

Severity levels describe the level of impact an SR has on the customer's business and define the resources to be engaged by both parties, as well as the rules of engagement for the resolution of the SR.

- **Sev 1:** Problem or product defect causes complete loss of service, regardless of the customer environment, and/or work cannot reasonably continue.
- **Sev 2:** Severe loss of service; no acceptable workaround; however, operations can continue in a restricted fashion.
- **Sev 3:** Minor loss of service; impact is an inconvenience that may require a workaround to restore functionality.
- **Sev 4:** No loss of service; minor error that does not impede operations.

For complete definitions of severity levels, download the PDF titled *Oracle's Technical Support Policies* at the following URL: oracle.com/support/policies.html

Search for Solutions

You can resolve your technical issues quickly by searching the Knowledge Browser. On Oracle *MetaLink*, navigate to [Knowledge > Knowledge Browser](#) or use the "Advanced" or "Quick Find" feature to search for technical documents, patches, bugs, service requests, error codes, and technical forums.

The Advanced Search page allows you to refine and further customize your query by entering simple, user-friendly prompts. You can combine options to create a more precise search. These options include selecting the type of search, the order in which information is shown, and the source or area of the site you wish to search.

Log a Service Request (SR)

Log in at metalink.oracle.com and navigate to [Service Request > SR Home > Create SR](#) and provide the following information:

- The relevant support identifier or CSI number
- The country code/area code and phone number
- The software release levels of the operating system and all Oracle components
- A description of the business impact to help determine the severity level
- A detailed description of the problem, including copies of session logs, trace files, or other diagnostic information

During the SR creation process, you can use the “Upload Files” feature to attach diagnostic output, as well as log and trace files pertinent to the issue.

Manage Existing SRs

Search for your SRs in *Oracle MetaLink* by navigating to [Service Request > SR Query](#)

Here you can search for all SRs associated with a specific support identifier, or search by SR number. Once you select the service request you are working with, you can

- View SR details and status
- Add notes or attachments
- Provide update information
- Close the SR

Reporting Bugs to Oracle Development

You can report suspected bugs to Oracle Development by creating an SR in *Oracle MetaLink*. Global Customer Support (GCS) is your link to Oracle Development. The support engineer assigned to your SR will verify the details of the potential bug and will then work with the appropriate development team to resolve it. The engineer will attempt to find a workaround to solve the issue while the bug is with development. The support engineer coordinates all technical correspondence and/or documentation regarding the SR or bug.

It’s important to know the answers to the following questions before creating an SR to report a bug:

- Is the problem reproducible?
- Has the errant behavior occurred consistently in your application?
- If not, have you changed or added any functionality since the last time the application worked correctly?
- Does the situation change if you remove this newly added functionality?
- Do you still have a copy of the previously working version of the application to compare?
- Did the new functionality work in a previous version of the product?

Help Speed the Resolution Process

The following tools are available to assist with faster resolutions:

Oracle Diagnostics. Global Customer Support engineers use diagnostics to view your data so they can identify the issue for quick resolution. The Remote Diagnostic Agent (RDA) is available for the database server, and Oracle Support Diagnostics Patch is available for Oracle applications. Oracle Support diagnostic tools can also be used to proactively prevent issues.

The following *Oracle MetaLink* notes will provide information on how to download, install, and execute these tools:

- *Oracle MetaLink* Doc ID 314422.1—Remote Diagnostic Agent Information
- *Oracle MetaLink* Doc ID 167000.1—Oracle Support Diagnostics Patch
- *Oracle MetaLink* Doc ID 178043.1—Oracle Support Services Diagnostic Tools, which provides a complete list of diagnostic tools for Oracle E-Business Suite, Oracle Application Server, and Oracle Database technologies

The above diagnostics information can be accessed from the *Oracle MetaLink* knowledge browser. Navigate to [Knowledge > Knowledge Browser > Tools and Training > Diagnostic Tools](#)

Software Configuration Manager. Software Configuration Manager is an *Oracle MetaLink* capability that gives Global Customer Support (GCS) engineers secure, centralized access to configuration information across your entire environment—database, middleware, and applications—to diagnose and resolve issues more quickly. Product and security alerts can access this centralized configuration information to send you proactive notifications of known issues unique to your environment, and HealthChecks access it to send recommendations for optimal system performance. These proactive notifications increase your ability to prevent known issues before they become critical, and the significantly enhanced information exchange between Oracle and your systems automates labor-intensive tasks and makes system changes easier to manage.

Configurations

- Catalog your configurations and view them from *Oracle MetaLink*.
- Provide detailed descriptions of business-critical environments.
- Create and maintain your configuration descriptions both manually and automatically.
- Associate projects with your configurations.
- Create service requests directly from the configuration listing.

Projects

- Manage your configurations by project from *Oracle MetaLink*.
- View your system configurations the way you want to manage your business.
- Identify project contacts, project roles, milestones, and critical dates.
- Identify project dependencies (if one project is dependent on another).
- Track service requests at a project level.

Oracle Collaborative Support (OCS). This is Oracle’s collaboration tool that allows support engineers to connect to and view information on your system through a Web conference.

- The session is initiated by Global Customer Support with your approval.
- Although you cannot initiate the Web conferencing session, you can request that your support engineer schedule a Web conferencing session by updating your SR via *Oracle MetaLink*.
- Once the support engineer initiates the Web conferencing session, you can join via *Oracle MetaLink* by navigating to [Service Request > Collaborative Support](#) or by going to conference.oracle.com
- Your support identifier is used as the conference key.

Use the Escalation Process

The SR escalation process is in place for business-critical issues that require a higher level of attention from a manager in GCS. You should use this process when you

- Encounter a critical roadblock or showstopper to implementation or upgrade plans.
- Urgently need to communicate important issues to a support manager.
- Are dissatisfied with the resolution or response to an SR. (If you are dissatisfied with the progress made by the escalation manager, you can further escalate to a senior manager/director. If you are dissatisfied with the progress made by the senior manager/director, you can further escalate to an Oracle Support vice president.)

If a critical problem is encountered, consider the timing of when to escalate an issue. Waiting to escalate may leave little time to research the root cause of the problem and develop the most effective solution. Large, complex problems take time to resolve. Advise GCS of target dates and deadlines or critical issues, and document this information in the SR. State how the problem impacts your business and the risk it poses to implementation plans. This information will help Oracle management effectively and promptly assign the required resources to resolve your problem.

See *Oracle MetaLink* Doc ID 199389.1—Escalating SRs with Global Customer Support

- Provide as much information as you can about why you are escalating.
- Call the Global Customer Support number and enter in your SR number. Inform the answering support engineer that you would like to speak with an escalation manager. (Please note that this may not be the support engineer who is working on your SR.)
- The engineer will page the appropriate escalation manager, who will call you within approximately 30 minutes of the request. (It is important that you telephone Global Customer Support to ensure that an escalation manager is paged. Updating the SR via *Oracle MetaLink* alone does not guarantee that you will receive a callback from the escalation manager within approximately 30 minutes.)
- The manager will work with you to create an acceptable action plan.
- The manager will document the conversation and the plan in the SR.
- The manager will follow up to ensure that the action plan is followed and/or reset expectations if necessary.
- The escalation manager owns the escalation until the issue is resolved or escalated to a higher management level.

Raising the Severity vs. Escalating. Escalating an issue brings management attention to it, and when appropriate, more resources. This does not automatically mean that the severity level of the SR will be changed. If the severity level of the SR becomes inappropriate, it may be adjusted in the same manner in which it was originally established—by mutual agreement between the support engineer and the customer.

Best Practices for Service Requests

- **Be prepared** to have access to ALL information that a support engineer might need to help in resolving your issue, including the appropriate support identifier and pertinent contact information.
- **Identify** the problem area precisely and attempt to isolate the issue to a specific group of Oracle products and operating system configurations, such as RDBMS, tools, applications, UNIX, desktop, and midrange. Running the appropriate diagnostics for your product before logging an SR will assist in locating the problem areas.
- **Create** a brief subject statement summarizing your request. The statement should include the object (which Oracle product is problematic) and the defect (the anomaly or ill behavior of the object).
- **Keep** your implementation configuration information easily accessible to the support engineer at all times.
- **Complete** the templates in *Oracle MetaLink* thoroughly. The answers to these questions are needed to help determine the severity level and will provide specific information about product and problem types that help the support engineer isolate the issues and speed up resolution.
- **Include** all information, such as details of the environment, steps taken prior to logging the SR, and data collection information retrieved from running the diagnostic scripts. More information is better.
- **Provide** any error messages and symptoms that may allow the support engineer to resolve your issue quickly. Also, attach any pertinent error logs, alert logs, and trace files to your initial SR.
- **Document** test cases if possible so GCS can recreate the problem if needed.
- **Always** refer to your issue by the assigned SR tracking number and keep an active list of all your currently open SRs.
- **Use** *Oracle MetaLink* to log, track, and update your technical issues.
- **Be prepared** to use Oracle Collaborative Support with your support engineer for more efficient information transfer and SR resolution.

If You Still Need Help

For free training on Oracle Support tools, e-mail
support-training_us@oracle.com

Register for any of the following regularly scheduled FREE Advisor Webcasts. Log in to *Oracle MetaLink* and navigate to [Headlines > News and Notes](#) or go to oracle.com/support/seminars.html and register for Advanced Support Tools, Diagnostics for Oracle E-Business Suite, Software Configuration Manager, Maintenance Wizard, Remote Diagnostic Agent, Working Effectively with Support, Introduction to *Oracle MetaLink*, or Advanced *Oracle MetaLink*.

Review *Oracle MetaLink*—Your Self-Service Portal:
oracle.com/support/metalink/index.html

Review the recommended reading list from Oracle Press. Oracle Press provides the only Oracle-authorized guides available. Get the most complete information on Oracle’s No. 1 line of e-business and database technologies.
<http://books.mcgraw-hill.com/landingpage.php?template=oraclepress>

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