Service Request Flow and Best Practices

Oracle Support Essentials

Oracle Support Training and Education

Learning Objectives

1. Create a well-defined SR

Understand how to properly create a well-structured Service Request (SR)

2. Know SR Best Practices

Know the support best practices and tips when working on a Service Request

3. Get Solutions faster

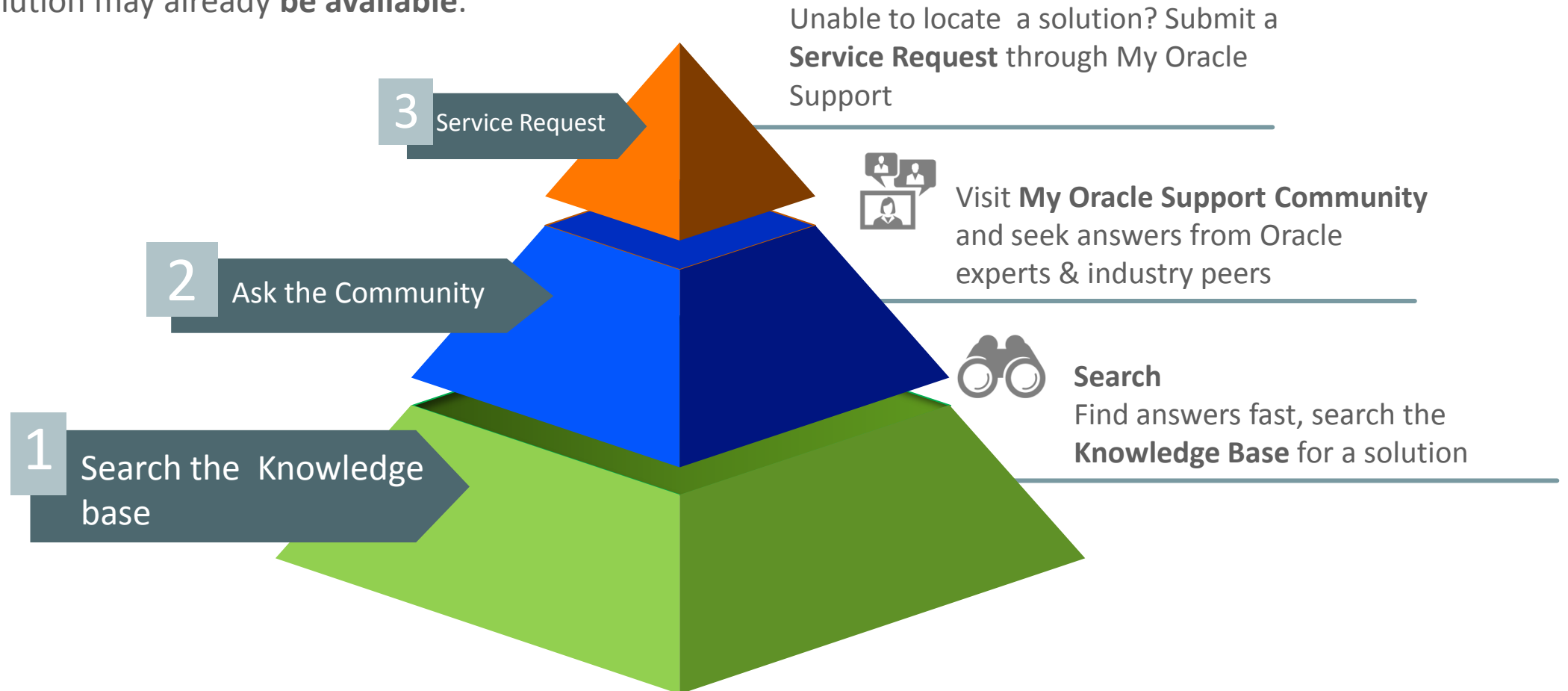Achieve faster Service Request resolution

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Agenda

1 ▸ Oracle Support Best Practices

2 ▸ Service Request Creation Flow and Management

3 ▸ Hints and Tips for Managing Service Requests More Efficiently

4 ▸ My Oracle Support Chat Feature & Mobile My Oracle Support

5 ▸ Service Request Management Attention Process

6 ▸ Additional Resources & Learning Options

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Oracle Support Best Practices

When you have a question, need, or issue…

… the solution may already **be available**.

Unable to locate a solution? Submit a **Service Request** through My Oracle Support

3 Service Request

Visit **My Oracle Support Community** and seek answers from Oracle experts & industry peers

2 Ask the Community

Search
Find answers fast, search the **Knowledge Base** for a solution

1 Search the Knowledge base

Service Request Creation Flow

Best Practices with Oracle Support

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Proactive Opportunity

Have all your information ready before you create a new SR

Problem Summary

Problem Description

Error Codes

Support Identifier

Product, Version

Serial Number

Environment

Files to attach

Business impact

Creating Service Requests
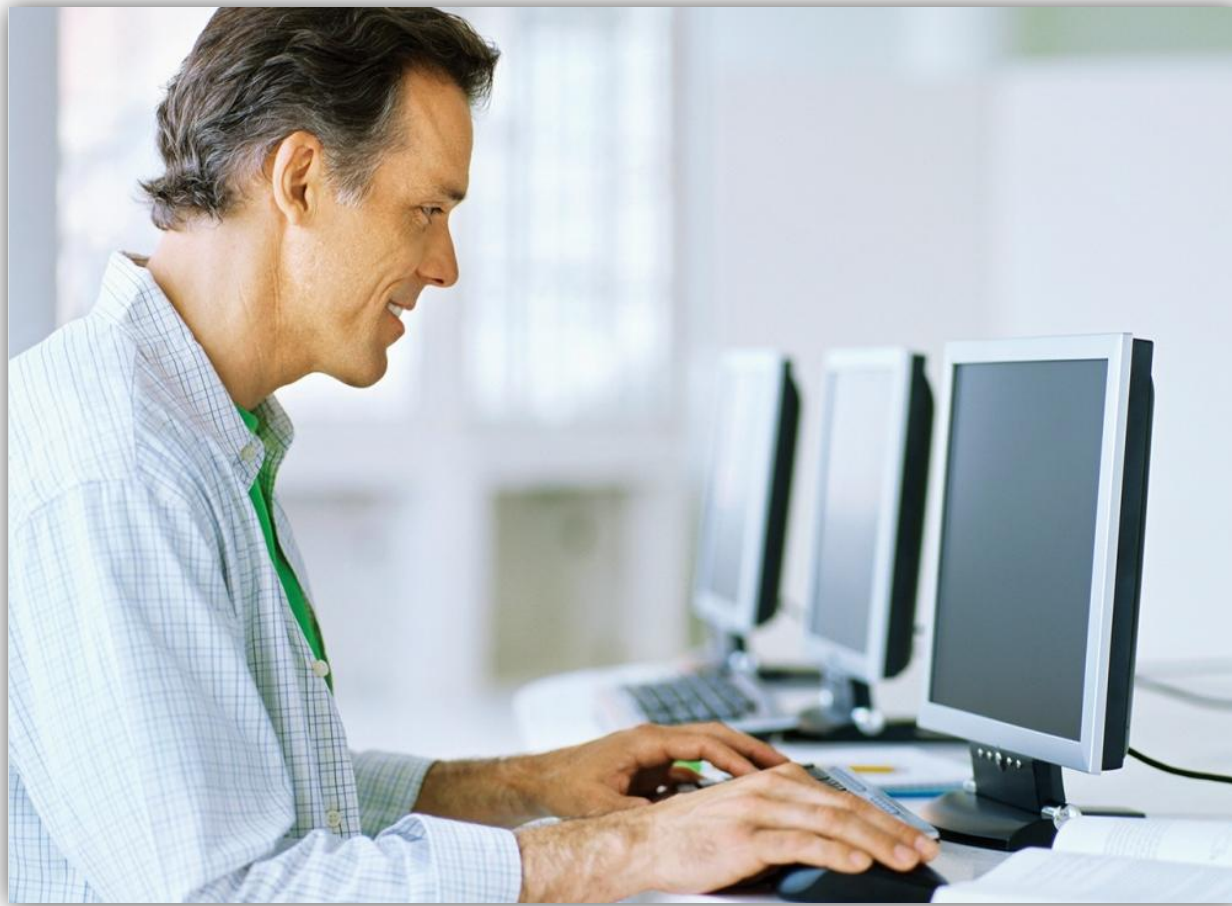
- Unable to locate a solution through the Knowledge Base or by asking a question in My Oracle Support Community?

THEN

- Log a Service Request using My Oracle Support

https://support.oracle.com

Creating Service Requests

Submit a well-formed Service Request

4 easy steps

Create Service Request: Problem

Problem — Solutions — More Details — Severity/Contact

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Service Request – Step 1 – What is the Problem?

Problem – Be descriptive

Problem Summary – simple and concise

Create Service Request: Problem

Problem — Solutions — More De[t] — Severity/Contact

Save as Draft | Back | Next | Cancel

What is the Problem?

Service Request language is set to English-American Edit

* Problem Summary

* Problem Description

Error Codes

Problem Description – use the tip to the right to create a good description of the issue

Error Codes may trigger additional questions

☑ Tip

A good Problem Description would include the following information:

- Describe the loss of functionality
- Describe the sequence of events that occurred
- What is the expected or acceptable result?
- Is there a workaround?
- Provide business impact information, estimated number of users affected, the significance of loss, associated milestones

Note: You may be asked for additional information in Step 2.

Note: Do not submit any health or other sensitive data that requires greater protection than those specified in the Oracle GCS Security Practices.

Service Request – Step 1 – Where is the Problem?

Select the Product and Version

Select a Tab that aligns to your Product/Service

Where is the Problem?

Autofill this section using: **SR Profile** or **Existing SR**

Configuration | Hardware | **Software** | Cloud | Managed Cloud Services

* Product | *Start typing...*

* Product Version

* Product Languages | English

Database/Version | *Start typing...*

Database Platform/Version | Choose Database Platform/Version

* Problem Type | Choose Problem Type

* Support Identifier | *Type name, number, description, or org., or selec...*

- The tabs displayed depend on the Support Identifiers in your profile

- The tab determines what type of Oracle Products are displayed

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Service Request – Autofill – Step 1

Use Autofill options to get the product information and save time

Where is the Problem?

Autofill this section using: **SR Profile** or **Existing SR**

| Configuration | Hardware | **Software** | Cloud | Managed Cloud Services |

* Product `Start typing...`

* Product Version

* Product Languages `English`

Database/Version `Start typing...`

Database Platform/Version `Choose Database Platform/Version ▼`

* Is the software problem on an Engineered System? ⦿ Yes ⦾ No

* Problem Type `Choose Problem Type ▾`

* Support Identifier `Type name, number, description, or org., or select from list`

Settings tab > SR Profiles

SR Profile

Service Request Profiles

Click on a profile link for quick fill SR fields or **Create New SR Profile**

Profile ▲▽	System	Product	Product Version	Database Version
DATABASE_11		Oracle Database - Enterprise Edition	11.2.0.3	
DBA_11.2		Oracle Database - Enterprise Edition	11.2.0.4	
EBS_Localization		LAD Add-on Localizations	12.1	11.2.0.3
EBS_PRODUCT_CATALO		Oracle Product Hub	11.5.10.2	11.2.0.3
HRMS_LINUX		PeopleSoft Enterprise HRMS Human Resources	9	9.2.0.8
Hyperion_FDM		Hyperion Financial Data Quality Management	11.1.2.2.300	11.2.0.3
HYPERION_HP		Hyperion Financial Management	9.3.1.4.00	9.2.0.8
HYPERION_WEB_ANALY!		Hyperion BI+	9.3.1.1.00	9.2.0.8
LINUX OS		Linux OS	Oracle Linux 7.0 wi	
PO_EBS		Oracle Purchasing	11.5.10	10.2.0.4
PSFT-CS-SELFSERVICE		PeopleSoft Enterprise CS Campus Self Service	9	10.2.0.4
PSFT_CRM_9		PeopleSoft Enterprise CRM Client Management	9	10.2.0.4
PSFT_G_LEADER		PeopleSoft Enterprise FIN General Ledger Brazil	8.9	9.2.0.8
PSFT_HR		PeopleSoft Enterprise HRMS Human Resources	8.9	9.2.0.8
PSFT_HR_LINUX		PeopleSoft Enterprise HRMS Human Resources	8.9	9.2.0.8
PSFT_ORDER_MANAGEM		PeopleSoft Enterprise FIN Order Management Br	9.1	11.2.0.3

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Service Request – Project Milestones – Step 1

Milestone Date available during SR creation and in the SR Summary

Where is the Problem?

| Configuration | Hardware | **Software** | Cloud | Managed Cloud Services |

* Product `Oracle Database - Enterprise Edition` ✖

* Product Version `12.1.0.2` ▼

* Product Languages `English` ▼

* Operating System/Version `Oracle Solaris on SPARC (64-bit) - 11` ▼

* Is the software problem on an Engineered System? ⚪ Yes ⚪ No ②

* Problem Type `Choose Problem Type` ▼ ②

* Support Identifier `ABC Company (1234567) – ABC Company` ✖

Project Milestone
07-Sep-2016 02:59 (In 6+ months)
GO LIVE

Project Milestones automatically display if enabled

- Customer User Administrators (CUAs) can add a Project Milestone and Date for a specific Support Identifier (SI)

- When Project Milestones and Dates are established they automatically display when selecting the SI and in the SR Summary region

Service Request – Problem Type – Step 1

Ensure your SR gets to the right Support Engineer

Application Development (SQL, Wrong Query Results, PLSQL, XML Database, XDK, JVM, Pro*C, OCI, OCCI, XA) ▸

Data Warehousing (Materialized Views, Query Rewrite, Oracle R) ▸

Database Installation, Upgrade & Downgrade (Server & Client) ▸

Database Performance (Hang/Spins, AWR/ADDM, Statistics, Locking, SQL Execution & Performance, Query Optimizer, Parallel Query, RAT) ▸

Database RAC (Real Application Cluster) ▸

Database Security (User Management, Auditing, Database Vault, Grants, ASO, EUS, VPD, OLS, TDE, Data Redaction) ▸

Database Storage (ASM, ACFS, DNFS, Compression, Corruption, Partitioning, LOBS, Tablespaces, Files) ▸

High Availability (Recovery Manager(RMAN), Backup & Recovery, Data Guard) ▸

Information Integration (AQ, CDC, Streams, Advanced Replication, Distributed Transactions, Message Gateway) ▸

Internal Errors and Core Dump (ORA-600, ORA-7445, ORA-4030, ORA-4031, ADR and IPS) ▸

Oracle Clusterware ▸

Oracle Multitenant Infrastructure

Oracle Net Services Connectivity Issues ▸

Other Database Admin (Config, Params, Memory, Dictionary, Scheduler, Processes, Startup/Shutdown, Undo/Rollback, Resource Mgr) ▸

Utilities, NLS (Char Sets, DST, Exp/Imp, Datapump, SQL*Ldr, Logminer, DBVerify, csscan) ▸

Where is the Prob

Configuration | Hard

* Pro
* Product Ver
* Product Langu
Database/Ver
Database Platform/Ver
* Is the software probl
* Problem Type [Choose Problem Type ▾] ⓘ
* Support Identifier [Type description, or org., or select from list]

Problem Type – select the option that most closely matches your issue

- SRs are assigned to a Support Engineer with the most **appropriate skill set for the problem type** selected

Service Request – Guided Resolution – Step 1

Guided Resolution

Where is the Problem?

Autofill this section using: **SR Profile** or **Existing SR**

Configuration | Hardware | **Software** | Cloud | Managed Cloud Services

* Product: Oracle Database - Enterprise Edition

* Product Version: 12.1.0.2

* Product Languages: English

* Operating System/Version: Oracle Solaris on SPARC (64-bit) - 11

* Problem Type: Internal Errors and Core Dump (ORA-600, ORA-700, ORA...)

Internal Errors and Core Dump (ORA-600, ORA-700, ORA-7445, ORA-4030, ORA-4031, ORA-3137, ADR and IPS) > Diagnosability Tools (adrci, ADR , IPS)

◎ **The following questions are designed to improve problem definition. Your answers can help decrease the time to resolve this Service Request.**

* Support Identifier: Type name, number, or org., or selec....

Guided Resolution – indicates that when selecting [Next] additional questions will be asked to assist in resolving and capturing additional data

- Problem Types can trigger a Guided Resolution to help resolve the issue or gather more data to enable the Support engineer to investigate your issue

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Service Request – Solutions – Step 2

Provide feedback when using Guided Resolutions

Feedback – help us – help you. Your feedback can drive improvements into the Guided Resolution flow

Service Request – Known Solutions – Step 2
Solve your issue and avoid having to create the SR

Rate the document – help us, help you – Provide feedback on content

Solutions – You can control this step and turn it off or on via: Settings Tab > Knowledge Preferences

This solved my problem – select if the issue was resolved

Service Request – More Details – Step 3

Include diagnostic data to expedite support analysis

Create Service Request: More Details

Problem — Solutions — **More Details** — Severity/Contact

Save as Draft | Back | Next | Cancel

Problem Type

* Problem Type   Data Warehousing (Materialized Views, Query Rewrite, Oracle R, In-Memory) > Database Storage: Compression   Edit▼ ⑦

Upload Files/Attachments

Recommended File 1)   Please upload any file(s) that may have been requested as part of a Data Collection request   Attach

Additional Files   Do you have other files that can help solve your Service Request?   A...

Upload Files – this is a critical step as it allows the Oracle Support Engineer to review the content and start work on your issue

- Attach any supporting documents, log files, trace files, screen shots

- Attach the output of diagnostic tools used

- For file uploads over 2GB, Explorer, or other Sun diagnostic files, refer to **How to Upload Files (Doc ID 1547088.2)**

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Service Request – Additional Information – Step 3

Ensure to provide the business impact

- Questions are based on the **Problem Type** selected in Step 1

- Provide business impact

- Describe the problem in detail, and the loss of functionality

- Is there a workaround?

Service Request – Severity – Step 4

The severity level represents the business impact

Create Service Request: Severity/Contact

Problem — Solutions — More Details — **Severity/Contact**   Save as Draft | Back | | Submit | Cancel |

*How critical is your problem? (Select severity level)

- ◯ 1 - Problem or product defect causes complete loss of service in the production environment or work cannot reasonably continue.
- ◯ 2 - Severe loss of service. No acceptable workaround. However, operations can continue in a restricted fashion.
- ◉ 3 - Minor loss of service. The impact is an inconvenience that may require a workaround to restore functionality.
- ◯ 4 - No loss of service. Minor error that does not impede operations.

Severity Level – these are as described in the Technical Support Policy

- Set the severity level appropriately to represent the real urgency of your issue
- Severity 3 is the default

Service Request Severity Levels

Severity Level	Business Impact Technical Impact	1st Response	Update Frequency	Resolution Time	Partnership
1	Mission Critical Business Impact	< 1 Hour (telephone preferred)	Continual Updates 24x7	Co-Owned	
2	Serious Business Impact	Communication Preference	Multiple Updates 24-48 hours	Co-Owned	
3	Minor Business Impact	Communication Preference	Updates 2-3 Business Days	Co-Owned	
4	No Business Impact	Communication Preference	Updates 3-5 Business Days	Co-Owned	

Service Request – Contact– Step 4

Change the Contact if necessary

- Only users associated with the SI are available for selection as a contact

- You have the ability to update the Primary Contact during Service Request (SR) creation and on existing SRs

Review and Submit
Save as Draft when necessary

Submit – You will see a message to indicate the SR was created

Create Service Request: Severity/Contact

Problem — Solutions — More Details — **Severity/Contact**

Save as Draft   Back   Submit   Cancel

Save as Draft – need more time to gather data – Save as a draft

*How critical is your problem? (Select severity level)

- ○ 1 - Problem or product defect causes complete loss of service in the productio...
- ○ 2 - Severe loss of service. No acceptable workaround. However, operations c...
- ◉ 3 - Minor loss of service. The impact is an inconvenience that may require a w...
- ○ 4 - No loss of service. Minor error that does not impede operations.

*Who should we contact for more information?

- * Primary Contact   Start typing...   ⑦
- * Phone Numbers
- E-mail Address
- * Contact Method   Web ▾

Add Alternate Contact

Customer Reference Number

(You can use this to reference an internal tracking number.)

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Contact Us = Non-Technical Service Request

- Use the **Contact Us** link to open a non-technical SR to give feedback to Support, report login issues, SI questions, privileges, etc.
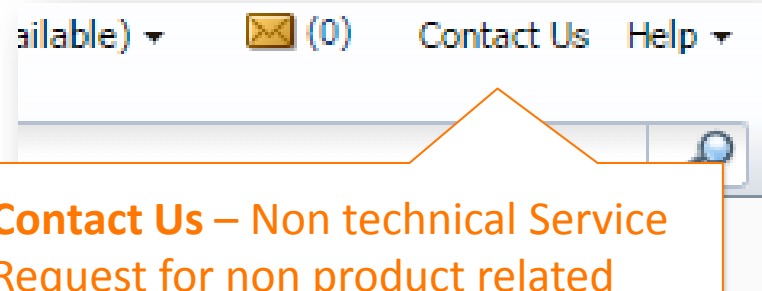
Contact Us – Non technical Service Request for non product related issues

Create Service Request: Problem

Problem — Solutions — More Details — Contact

What is the Problem?

Service Request language is set to English-American Edit

* Problem Summary

* Problem Type: Choose Problem Type ▾

* Support Identifier

- Cloud Delivery issues
- Diagnostic Tools issues
- General issues with MOS
- Hardware Data Corrections
- Internal Only - HW ASR Non-Tech
- Internal Only CUA
- Internal Only M&D
- Issues with newly acquired companies ▸
- License and Entitlement questions ▸
- License Key ▸
- Login/Administration /Profile issues ▸
  - Hardware/OS - Customer Profile Issue
  - Hardware/OS - Logon/Access Issue
  - Hardware/OS - Support Identifier Admin Issue
  - Software - Customer Profile Issue
  - Software - Logon/Access Issue
  - Software - Support Identifier Admin Issue
- Mobile My Oracle Support Questions
- Oracle Cloud Billing Questions
- Oracle Cloud Termination Questions
- Oracle VM template for Fusion Applications
- Other Hardware Customer Non Technical questions
- Other Lines of Business queries ▸
- Software & OS Media Requests

Problem Type – May trigger a guided resolution flow with additional questions

Non-Technical Service Requests – Problem Type

Guided Resolution

Guided Resolution – may be triggered based on the Problem Type selected

- Based on your problem type - you may be presented with a Guided Resolution to help resolve your issue

Managing Service Requests

Best Practices, Hints and Tips

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Service Request Region on the Dashboard or SR Tab

Finding and Filtering Service Requests

- The Service Requests Region allows you to find and filter SRs

Use the options – to determine what content is displayed

Service Request Region on the Dashboard or SR Tab

Personalize and Download a list of SRs based for one or more SI

Export – to xls

View – determines what columns you view and in what order
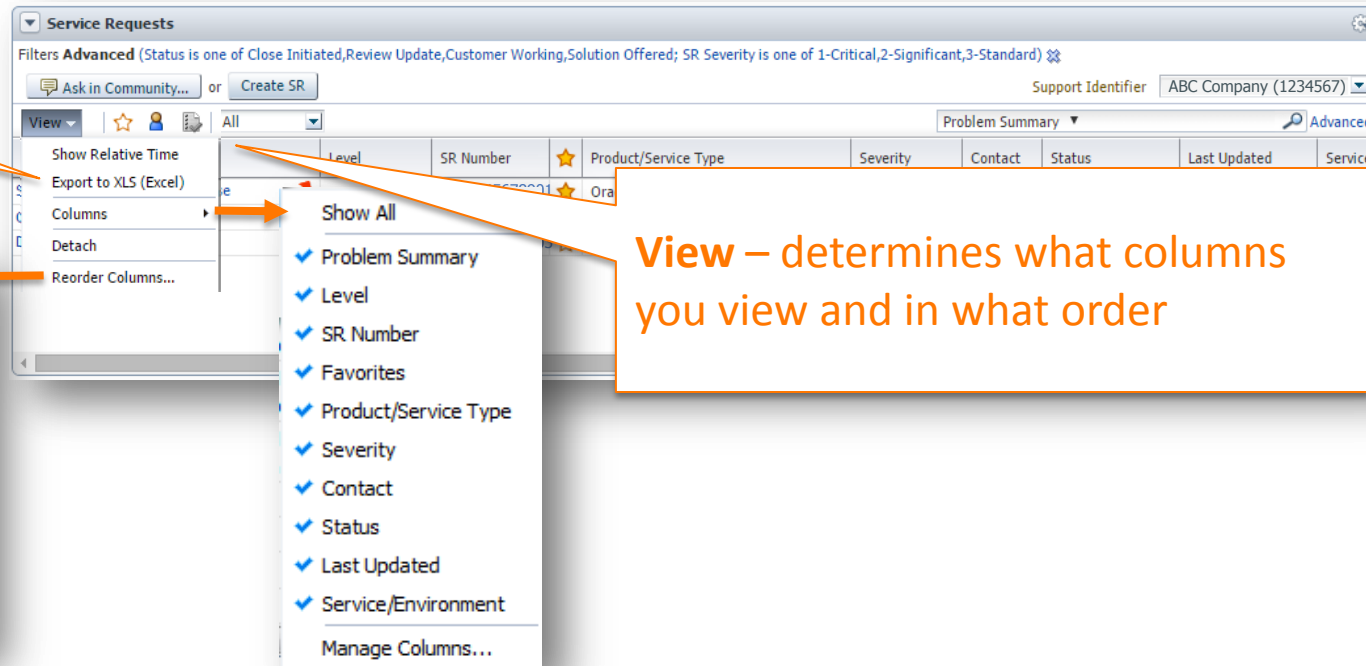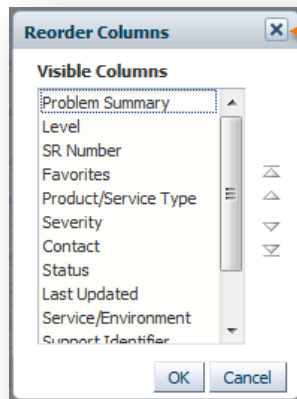
- Control the layout of SR information

- Export to XLS - Download SR information based on your view

Service Request Status Codes

Customer	
Customer Working	Oracle Support is waiting for the customer to update the SR
Solution Offered	Potential solution has been provided and Oracle Support is awaiting customer feedback
Close Initiated	Indicates that the customer has not responded to Support Engineer's request within a Support-designated time frame

- Statuses change frequently on open SRs
- Important to note who owns the next action
- Respond to your customer action codes to ensure your SR continues moving...

Oracle Support	
Work in Progress	Next action is owned by Oracle Support
Development Working	Next action is from Development, but Oracle Support is responsible for the follow up

When working a Service Request...

- If your SR is a priority for you, make it a Favorite for easy access from Mobile My Oracle Support

- Documentation is essential (complete and structured)

- Monitor changes in your Service Request and reply promptly

- All updates, and the actions between the support engineer and the customer are documented by date in the SR

- The **Summary** region has details about your SR, current status, escalation info, attachments, project milestone, option to update the primary contact, etc.

My Oracle Support Initiated Chat

Oracle Support Engineers can request to chat with you on open Service Requests

Available to all MOS users

This features is available if you have logged into Chat and have the green available icon next to your username.
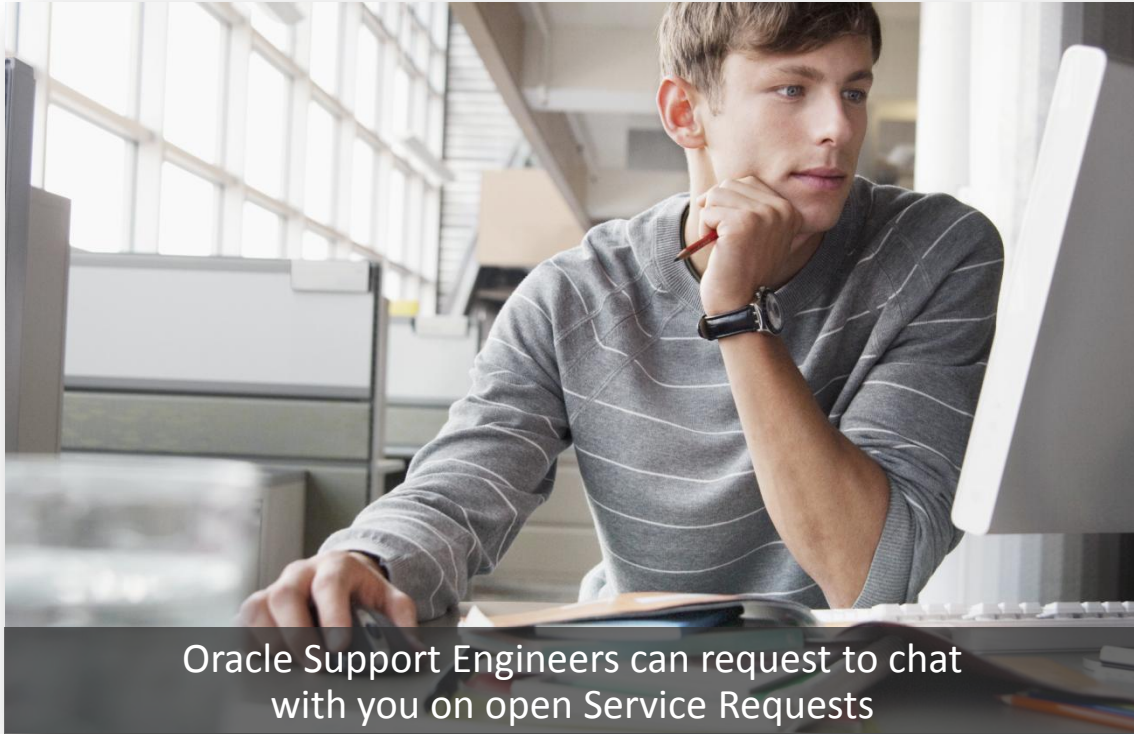
This feature is available to all My Oracle Support users, using any supported browser.
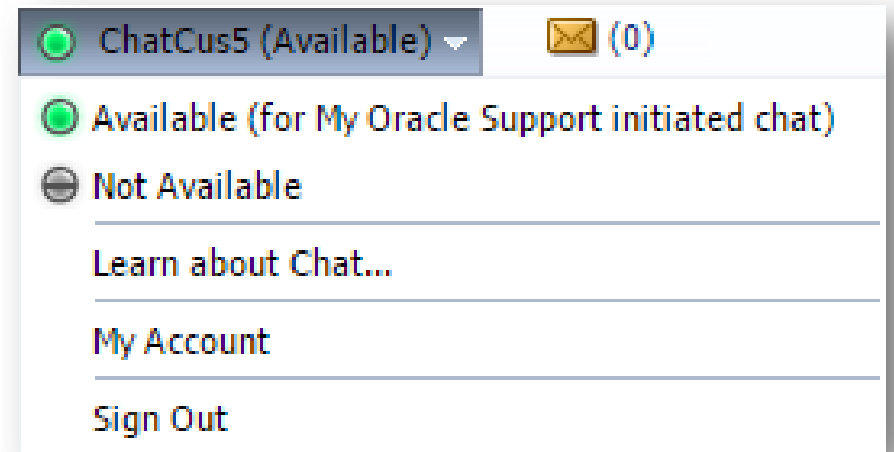
My Oracle Support Initiated Chat
Available for Existing Service Requests

- An online chat session can often answer a question or clarify a situation to help progress open SRs faster

- Your Oracle Support Engineer may request a chat:
  - ✓ to ask a simple question or review information provided in the SR

  - ✓ to share commands or information that are easier to document in writing, such as complex command syntax

  - ✓ if you were unreachable by telephone, but are online for a chat

My Oracle Support Initiated Chat

- You control your availability for an online chat

- Set your chat status to **Available** in My Oracle Support, in the top right corner, when you are available to engage in a chat

- Oracle Support Engineers can send an invitation to chat to both the **Primary** and **Alternate** Service Request Contacts

My Oracle Support Initiated Chat

Chat invitations

Best Practice: If you would like to chat, but are unable to at that time, accept the invitation and negotiate a different time with the Support Engineer

- You will only be contacted concerning open Service Requests

- If you receive a chat request from a Support Engineer, you can decide to:

  ✓ accept the chat

  ✓ decline the chat

- Invitations with no response will expire after 10 minutes

My Oracle Support Initiated Chat

Chat Feedback

- When the chat is complete, a **Give feedback** link is provided for you in the chat window

Give feedback Link

Feedback Form

My Oracle Support Initiated Chat

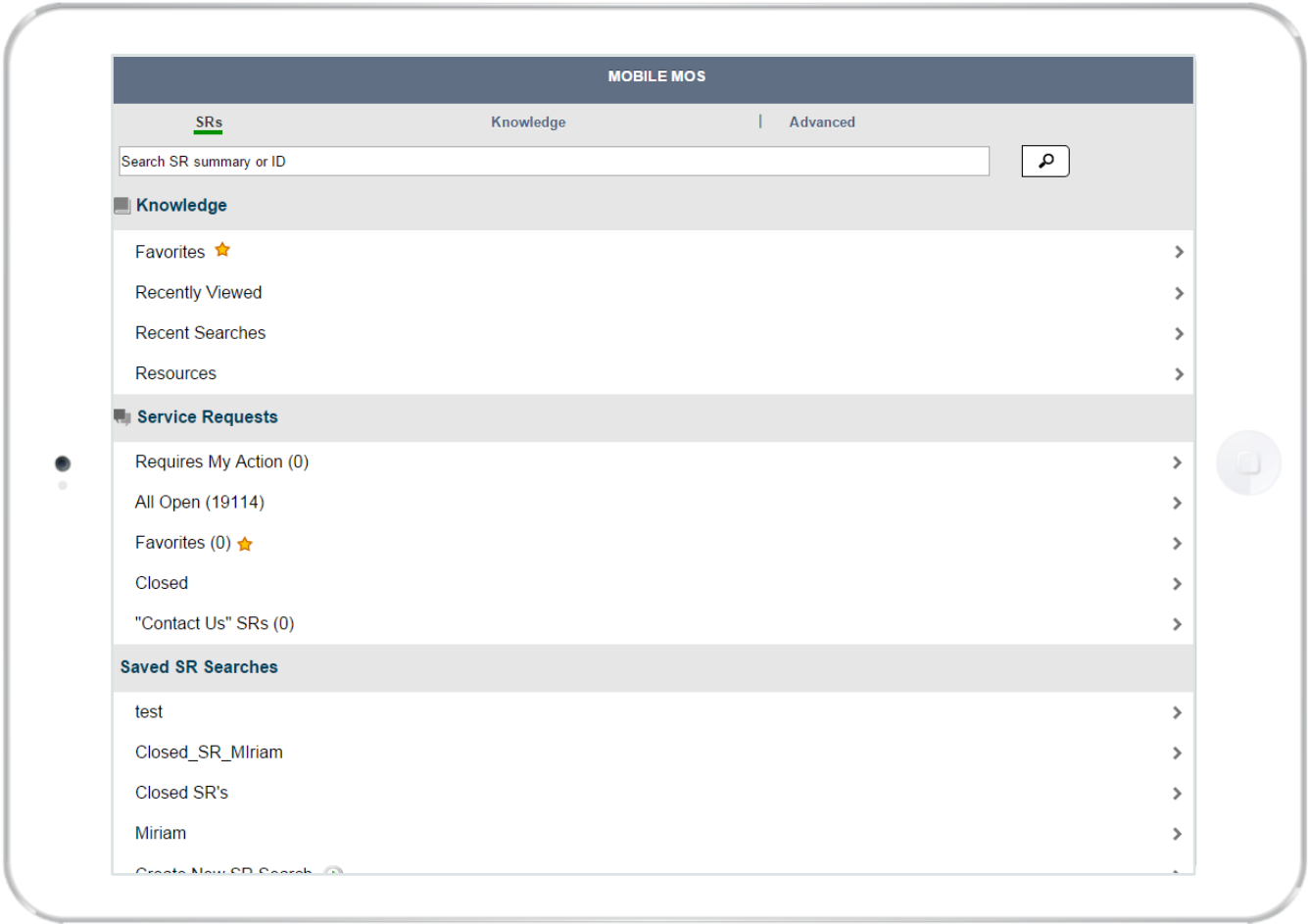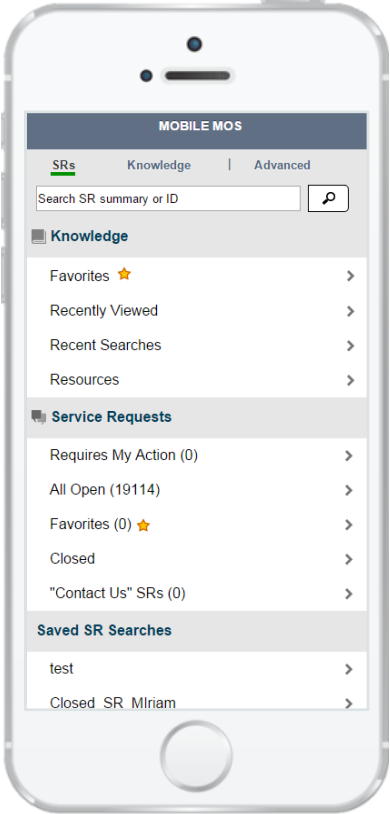**Chat Summary in the Service Requests**

- When the Chat is closed, the Support Engineer summarizes and saves the pertinent technical details to the Service Request
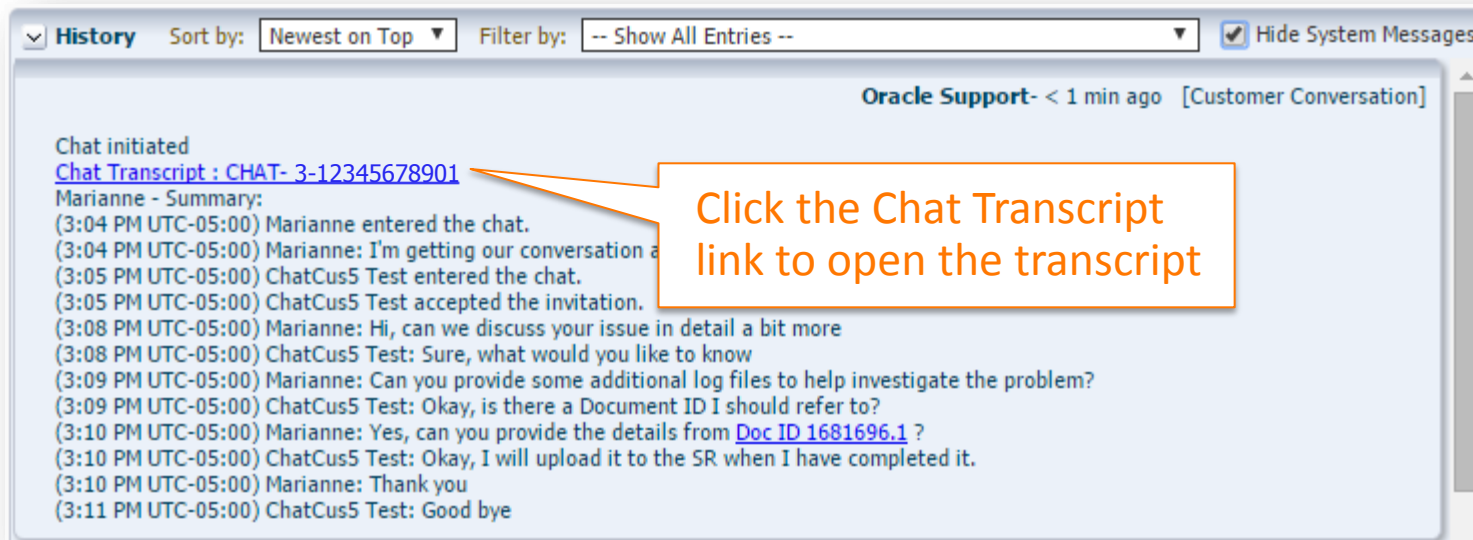
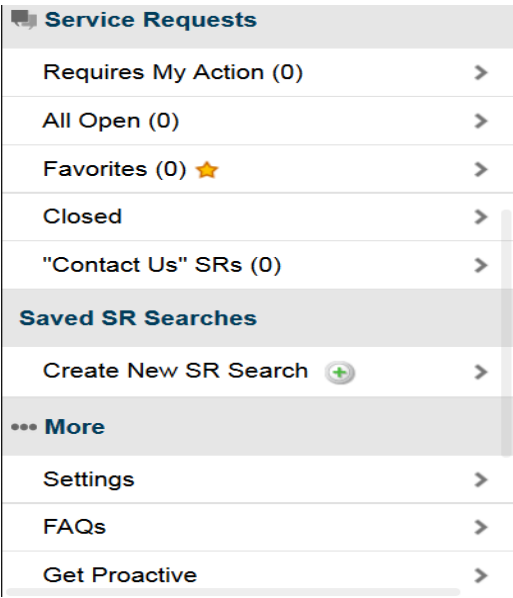- For more details about the Chat feature, watch the training video **How to use Oracle Support Initiated Chat (Doc ID 1643038.1)**

Use Mobile My Oracle Support

Mobile My Oracle Support
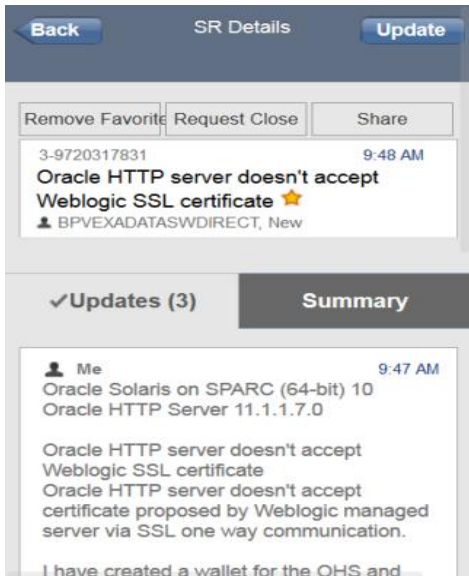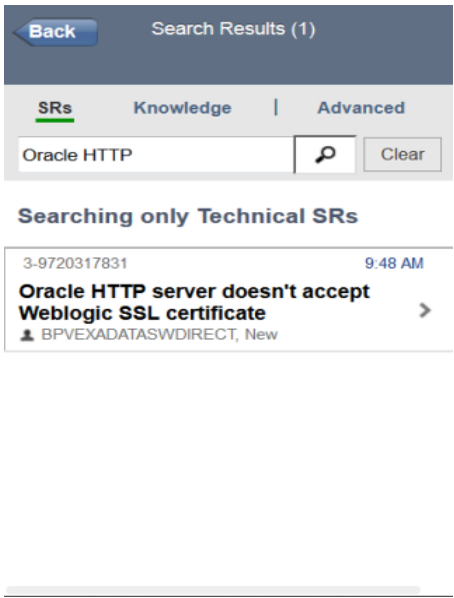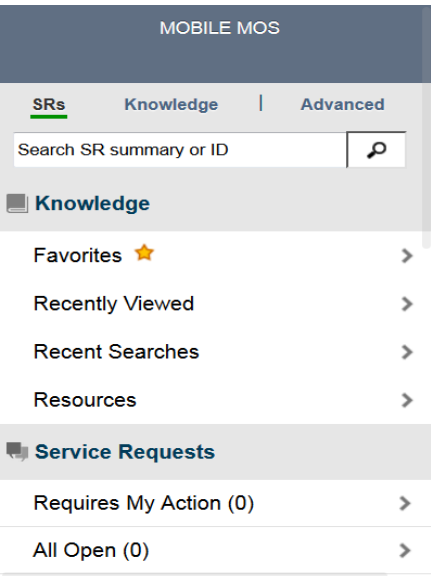
Locate SRs via Searching

Click SR Header to view SR in MOBILE MOS

Click "Update" to add in your comments

Scroll down to view your SRs – (0) shows the number of Actions needing updates

https://support.oracle.mobi

Service Request Manager Attention Process

Managing Critical Issues

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Requesting Manager Attention to a Service Request

- Engaging the **Manager's Attention** will facilitate the creation of an Action Plan to resolve the issue with your Service Request

- Request Management Attention **when** :
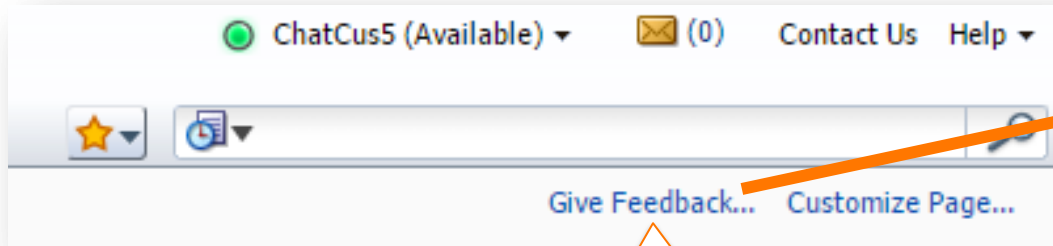 - the SR is not progressing in a manner that will meet your project milestones, implementation or upgrade plans
  - you urgently need to communicate important business issues to a manager
  - you are dissatisfied with the resolution or response to a Service Request

- **Call Support**
  - Find the local number to call at www.oracle.com/support/contact.html

- **Speak with the analyst** regarding your specific, immediate need and any applicable business impact
  - Need a call back: Request that a manager call you back and provide your contact information
  - Do not need a call back: Provide detailed information you would like conveyed to the manager

- **More information** is available on Document 199389.1 – How to Request Management Attention to a Service Request (SR) with Oracle Support Services

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Additional Resources & Learning Options

My Oracle Support – Customer Survey

Provide your feedback about Service Request tasks

Give Feedback

Submit Feedback

- Assist in improving the Service Request Process by providing feedback

Use Icons To Guide Your Learning Experience

Help Documentation at your fingertips

My Oracle Support and Cloud Support Portal documentation. Find it from the **Help** link in the top right corner of most pages in both portals.

Oracle Support Essentials Webcasts

Live instruction, Q&A. If you miss a webcast, they are repeated. The How To Series covers similar content in a step-by-step approach.
Doc 553747.1

My Oracle Support 'How To' Series

Detailed training videos, documentation. Latest how-to content, webcasts, self-paced replay. Select a feature or role to get started.
Doc 603505.1

Advisor Webcast Series for interactive learning

Review the current schedule and archived recording for your product. Find a webcast of interest.
Doc 740966.1

Get Proactive Portfolio for your products

Check out the Get Proactive Portfolio for your products. Get familiar with the top proactive tools.
Doc 432.1

Oracle Support Accreditation learning

Leverage the Oracle Support Accreditation portfolio of portal and product accreditations. Get accredited today.
Doc 1583898.1

Get Proactive Events Calendar

Stay Informed about Upcoming Events. Doc 125716.1

Use Icons To Guide Your Learning Experience

My Oracle Support Community

The My Oracle Support Community is populated with Spaces and Subspaces that are product and functionality based. My Oracle Support generic questions are asked in the Using My Oracle Support Community.

My Oracle Support Blog

Access the Blog to stay informed about latest features and functionality available in My Oracle Support or Cloud Support Portal

My Oracle Support Twitter

Follow My Oracle Support, for the latest updates and information.

Download Collateral

this icon is used on Support Training pages within My Oracle Support and Cloud Support portal to indicate PDF downloads available.

Patching

Within training materials this icon represents, patching, updates, fixes etc.

Stay Informed Using Oracle Support Blogs

Oracle Support Blogs are based on Oracle Support analysts experience, technical knowledge, and product training.

They provide information relating to: Product news, technical insights, how to use support tools, and other interesting topics to enable you to get the most from your Oracle Support Experience.

Support Blog access

➢ Directly - https://community.oracle.com/community/support/support-blogs

➢ Via the Support Product Index (Document 222.1)

➢ Search for 'Product Support Blogs' in My Oracle Support

➢ How to subscribe to blog postings (short video)

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Questions

- If you have questions, now is the time to ask them.

- Post your question into the **Webex Chat feature** and I will read out the question and provide the answer.

Integrated Cloud
Applications & Platform Services

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