

# 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 middle-ware 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 Support Services Contact Information

Expect support any time: Resolve issues online immediately with OracleMetaLink, the Web support tool that's available 24/7 at [metalink.oracle.com](http://metalink.oracle.com).

## Useful Oracle Contact Information

Oracle Support\*: +1.800.223.1711  
Support Sales\*: +1.800.833.3536  
Oracle Sales Department\*: +1.800.ORACLE1  
PRN (Partner Resource Network)\*: +1.800.323.7355  
Oracle Consulting Services\*: +1.800.633.0615  
Advanced Customer Services\*: [ACSinfo\\_us@oracle.com](mailto:ACSinfo_us@oracle.com)  
Oracle University\*: +1.800.633.0575  
Independent Oracle Users Group (IOUG) HQ: +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 Corporation home page: [oracle.com](http://oracle.com)  
Oracle Support Services: [oracle.com/support](http://oracle.com/support)  
Oracle Lifetime Support Policy: [oracle.com/support/premier/lifetime-support-policy.html](http://oracle.com/support/premier/lifetime-support-policy.html)  
Oracle Support Global Contacts Directory: [oracle.com/support/contact.html](http://oracle.com/support/contact.html)  
Web-based Customer Support (OracleMetaLink): [metalink.oracle.com](http://metalink.oracle.com)  
Oracle Collaborative Support: [conference.oracle.com](http://conference.oracle.com)  
Oracle Store (Sales): [oraclestore.oracle.com](http://oraclestore.oracle.com)  
Oracle PartnerNetwork: [oracle.com/partnerships/index.html](http://oracle.com/partnerships/index.html)  
Oracle Consulting: [oracle.com/consulting](http://oracle.com/consulting)  
Advanced Customer Services: [oracle.com/support/advanced-customer-services/index.html](http://oracle.com/support/advanced-customer-services/index.html)  
Oracle University: [oracle.com/education](http://oracle.com/education)  
Independent Oracle Users Group (IOUG): [ioug.org](http://ioug.org)  
Oracle Development Tools User Group (ODTUG): [odtug.com](http://odtug.com)  
Oracle Applications Users Group (OAUG): [oaug.org](http://oaug.org)  
Oracle OpenWorld: [oracle.com/openworld](http://oracle.com/openworld)  
Oracle Magazine: [oramag.com](http://oramag.com)

## Essential Resources

### OracleMetaLink

OracleMetaLink is your single point of entry to online technical information and allows you to access Oracle Support Services. It is

- Your portal to our global knowledgebase, complete with answers to known problems. Includes product alerts, de-support 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 OracleMetaLink 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 OracleMetaLink at [metalink.oracle.com](http://metalink.oracle.com) or [oracle.com/support](http://oracle.com/support). There you can

- 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, you need to select the "First Time Users Register For OracleMetaLink" option to obtain an account. Use your active support identifier (CSI) to complete the brief online registration process. Once you log in to OracleMetaLink, you can then go to [Profile > Licenses](#) to add additional support identifiers for the products you are working with.

## Working Effectively with Oracle Support Services

### Things You Need to Know

**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](http://oracle.com/support/policies.html).

### Search for Solutions

You can resolve your technical issues quickly by searching the Knowledge Browser. On OracleMetaLink, 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](http://metalink.oracle.com) and navigate to [Service Request > SR Create](#). You need to provide the following information:

- The relevant support identifier or CSI number
- Country code/area code and phone number
- 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

At the end of the SR creation process, you can use the “Upload to Support” 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 Search. 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
- Provide update information
- Add notes or attachments
- Close the SR

## Reporting Bugs to Oracle Development

You can report suspected bugs to Oracle Development by creating an SR in Oracle*MetaLink*. Oracle Support 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.** Oracle Support engineers use diagnostics to view your data so that 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 > Support Tools > Diagnostic Tools](#).

**My Configurations and Projects.** My Configurations and Projects is a new Oracle*MetaLink* feature that when enabled gives Oracle support 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.
- Configure third-party software.

## Projects

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

**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 Oracle 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/](http://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 Oracle Support. 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 Oracle Support of target dates and deadlines you have for 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 Oracle Support

- Provide as much information as you can about why you are escalating.
- Call the Oracle Support number and inform the answering support engineer that you would like to speak with an escalation manager. (Please note that this will 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 Oracle 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: 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 Oracle Support can re-create the problem if needed.
- **Always** refer to your issue by referencing 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](mailto:support-training_US@oracle.com)

Register for any of the following regularly scheduled **FREE online seminars** on Oracle*MetaLink*, under [Headlines > News & Notes](#), or at [oracle.com/support/seminars.html](http://oracle.com/support/seminars.html): Support Diagnostics for Oracle E-Business Suite 11*i*, Other Advanced Tools, My Configurations and Projects (MCP), Introduction to Oracle*MetaLink*, or Self-Served Oracle*MetaLink*.

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