

Customer Quick Reference Guide

For Siebel 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 Siebel SupportWeb, available 24/7 at ebusiness.siebel.com/supportweb. If you do not have a SupportWeb account, or if you have a question, please contact us at siebelsupport@oracle.com or call your local support center.

Support Services Phone Numbers

North America Business hours 6 a.m. to 6 p.m. Pacific time
+1.800.214.0400 or +1.650.341.0700

Asia Pacific Business hours 9 a.m. to 6 p.m. local time
Japan: +0120.606.750 (Toll-free domestic) Singapore: +65.6436.1866
+81.3.5251.8884 (Outside of Japan)

Europe/Middle East/Asia Business hours 9 a.m. to 6 p.m. Central European time
France: +44.118.92.45678 Ireland: +44.118.92.45678
Germany: +44.118.92.45678 United Kingdom: +44.118.92.45678

Latin America Business hours 9 a.m. to 6 p.m. local time
Brazil: +55.11.5189.3330

Useful Web Sites

Oracle Corporation and Siebel: oracle.com/siebel
Oracle Support Services for Siebel: oracle.com/siebel/support.html
Oracle Lifetime Support Policy: oracle.com/support/premier/lifetime-support-policy.html
Oracle Support Global Contacts Directory: oracle.com/support/contact.html
Web-Based Customer Support (Siebel SupportWeb): ebusiness.siebel.com/supportweb
Oracle Collaborative Support: conference.oracle.com
Oracle University Siebel Training: education.oracle.com/transition/ou_site_selection_siebel.html
Oracle OpenWorld: oracle.com/openworld
Oracle Magazine: oramag.com

Essential Resources

SupportWeb

Siebel SupportWeb is an online resource that provides users with a comprehensive repository of product information and solutions and the ability to interact with Siebel Technical Support. Supported users can access SupportWeb directly at ebusiness.siebel.com/supportweb. Full-access accounts are provided to technical support contacts. A read-only account is also provided for your entire project team.

Siebel Technical Support provides around-the-clock access to information and answers through SupportWeb. The Web site contains answers to common support issues raised by Siebel customers, and proactive product information. This should be the first place you look for solutions to your issues. SupportWeb also allows you to submit and track your service requests and track the status of your change requests, fix requests, system profile, and support agreement.

Online Support

An account will be established for qualified **technical contacts**, providing access to SupportWeb. Issues will be channeled and resolved through your technical contacts using SupportWeb.

To maximize your Siebel product implementation success and your return on investment, it is recommended that your technical support contacts be trained representatives of your company. Such training should include initial basic product training and, as needed, supplemental training appropriate for the specific role or implementation phase, specialized product usage, and/or migration. This training ensures that your implementation team has the right level of knowledge to troubleshoot issues and provide the necessary technical information to the Siebel Technical Support team so that it can effectively work with you to resolve your issues quickly.

The following two courses are strongly recommended for all supported customers or partners who wish to become a technical contact: **Siebel Essentials** or the **Core Consultant Course**. Additionally, courses specific to the applications or modules your company has purchased are strongly encouraged. For example, if you are implementing Siebel Analytics, the following courses are recommended: Analytics: Data Warehouse Developer, Analytics: Server Architect for Analytical Applications, or Analytics: Application Developer.

For more information about Siebel applications training, visit the Oracle University Siebel Training site at: education.oracle.com/transition/ou_site_selection_siebel.html

Once training has been completed, please e-mail a request to establish your employee as a technical contact to siebelsupport@oracle.com and copy your technical account manager (TAM) or customer account manager (CAM), if you have one. Please include the following information in your e-mail:

- Name and title of technical contact
- Company
- Work e-mail address
- Work phone number
- Dates and training classes attended at Siebel University

A SupportWeb username and password will then be sent via e-mail to your contact. Please allow one business day after all required information is received to complete this process. In the rare event that you do not receive your username and password within the specified time frame, please e-mail siebelsupport@oracle.com for a status update.

Siebel Technical Support will also establish one read-only account for your project team to share. The read-only account provides access to the technical support Knowledge Base and read access to the "My Company's Service Request" view within SupportWeb. Only technical contacts can log and update service requests.

Working Effectively with Oracle Support Services

Things You Need to Know

License keys: Siebel CRM and Siebel Analytics products require license keys for use. To help you select the specific license keys applicable to the Siebel CRM and Siebel Analytics products you have licensed, please visit the following Web site: licencsecodes.oracle.com/siebel.html

Technical contacts: Siebel Technical Support provides assistance to your organization through technical contacts. Technical Support works with these contacts primarily via e-mail and through service requests in Siebel SupportWeb, Siebel's technical Web service. In order to initiate the support process, your organization must identify your technical contacts to Siebel Technical Support. A technical support account will be established for qualified technical contacts, providing access to Siebel SupportWeb. Issues will be channeled and resolved through your technical contacts using SupportWeb.

Your company may appoint as many technical contacts as specified in your Siebel agreement. You also have the option to purchase additional technical contacts. Please contact your sales representative to request further information. For continuity, we ask that you retain the same people as your contacts for at least 90 days, unless they leave the company.

A service request (SR) is a request by a supported customer for help with a technical or nontechnical problem. SRs should be logged using SupportWeb and are assigned a unique tracking number.

Severity levels: Service requests are assigned a severity level according to impact on your business. Please use the following definitions to assess your situation and provide the appropriate severity level when logging a service request with Siebel Technical Support. A support representative will confirm that the correct severity level has been assigned based on the information provided in the service request.

- 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 Siebel SupportWeb Knowledge Base to find the information you need. On SupportWeb, click the [Browse/Search Knowledge Base \(English\)](#) link in the "Self-Service" section. Use the Support Search or Advanced Search feature to search our

extensive Knowledge Base, including alerts, product documentation, troubleshooting steps, technical notes, FAQs, product certification, and more. Support Search allows you to quickly filter your search by product line, product release, content type, and product version. Advanced Search enables you to select the search type, refine and further filter your query by product area, specify the number of search results returned per page, and save your search options. Search results are returned in order of relevance to your search criteria, but you can also choose to sort your search results by title or last modified date.

Log a Service Request (SR)

Log in to Siebel SupportWeb and click the [My Service Requests](#) link in the “My Accounts” section. This view enables you to create new service requests and check the status of existing service requests that you have logged. Click the Submit New SR button to create a new service request and then select the appropriate service request type. For a technical product issue, you will be asked to specify the following information:

- Severity (1—Production environment down; 2—Significant issue; 3—Incorrect behavior, workaround available; 4—Information request/clarification)
- Implementation project and system profile (product, environment, and third-party product information)
- Product area
- Problem topic and detailed description

After providing this information, you can attach log files and screenshots and then submit the service request. After logging a Severity 1 issue, please call Siebel Technical Support for immediate assistance.

Manage Existing SRs

Siebel Technical Support will attempt to respond to all service requests promptly. To keep you informed of the progress of your SR, you will automatically receive an e-mail notification whenever new activity is added to your service request. These e-mail alerts will be sent to the e-mail address listed in the “Update Profile” page. If this address needs to be updated, please e-mail siebelsupport@oracle.com with your new address.

Checking the Status of the Service Request

To view the status of your service requests, click the [My Service Requests](#) link. You can find a service request by searching for its unique service request number or by using the Topic, Date Opened, SR Number, Last Name, or Status fields. Click the Find SR button in the upper-right corner of the “My Company’s Service Requests” or “My Service Requests” page.

In the “My Company’s Service Requests” or “My Service Requests” page, you can see the following information about your SR:

- | | |
|--|---|
| • SR Number | • Contact Name (Last Name and First Name) |
| • Next Update (the date you can expect an update on your SR) | • Area |
| • Status | • Customer Reference |
| • Substatus | • Implementation Project |
| • Date Opened | • Severity |
| • Topic | |

Click the SR number to go to the “Service Request Detail” page, where you can view updates, related change requests, and attachments.

Adding and Viewing Updates

Online updates are an easy way to add comments to an existing service request. You can add updates in your service request by clicking the Add button in the “Updates” section in the middle of the “Service Request Detail” page. (To get to this page, click a service request number in the service request list view.)

Report a Defect to Development

To report a defect, log an SR to Siebel Technical Support. Once Technical Support verifies that there is a defect in the software, a change request (CR) is created and associated with the SR so that you can track the status. For more details on the change request management policy, visit the following URL:
supportweb.siebel.com/support/private/content/general/DefectManagementProcess.html

Help Speed the Resolution Process

Troubleshooting Steps: Siebel Troubleshooting Steps are documents that address how to troubleshoot common error messages and unwanted behavior in Siebel applications. These documents include a description of the behavior or error message, the cause, steps to diagnose, and steps to resolve. These documents will help you begin to troubleshoot issues and explain how you can take advantage of the diagnostic features of the application to isolate and resolve unwanted product behavior. To access these documents

- Go to: supportweb.siebel.com/default.asp?lf=enu-supportsearch.asp&rf=general/main.asp&tf=t-support_search.asp
- Click the Troubleshooting Steps link in the left menu bar.
- Navigate to the index or appropriate product areas listed on the right.

Environment Verification Tool: The Environment Verification Tool (EVT) is used to verify that a server running Siebel software is configured correctly and complies with the Siebel system requirements and supported platforms for the given version. EVT will assist in identifying potential problems in your environment before and after installation. The tool does not substitute for or validate all parts of the Siebel System Requirements and Supported Platforms (SR&SP) document. However, using EVT will expedite your efforts to ensure system compliance. For more on EVT, go to: supportweb.siebel.com/support/private/content/TECHNOTES/ENU/V7/technote467.html

System Profiles: Using Siebel SupportWeb, you can create and store system profiles, which are collections of information about a user’s environment. SupportWeb users are encouraged to create system profiles to store third-party product information, such as database, database server OS, application server OS, and much more. Users can set up multiple system profiles to represent various systems in different environments, such as test, development, or production. You must have a system profile to enter a service request, and the data within the system profile populates the service request’s required third-party product information, Siebel product release, and Siebel version, thereby streamlining the creation of the service request.

Additionally, system profile data provides Siebel Technical Support with a detailed picture of third-party products in use to more effectively resolve technical issues, prioritize maintenance releases, and proactively notify customers about critical issues and new content posted within SupportWeb.

To establish a System profile

- Navigate to “My Service Account” from the SupportWeb home page
- Click [My Company’s Implementation Projects and System Profiles](#)
- Create and name an implementation project and the related system profiles for that product
- Insert records for the database, application server OS, database server OS, and other third-party products associated with that system profile

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

- The session is initiated by Technical 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 SupportWeb.
- Once the support engineer initiates the Web conferencing session, you can join by going to conference.oracle.com/.

Use the Escalation Process

Siebel Technical Support will make every attempt, within the guidelines for the severity level of the issues, to resolve all reported problems promptly. In the exceptional cases where an escalation is necessary, the escalation process should be used to ensure that additional attention is provided to the issue.

To escalate a service request:

- Call the main Technical Support phone number for your region and request that your issue be escalated.
- A technical support manager will contact you. If either you or Siebel Technical Support judges that a situation requires a higher level of resource

or communication than normal, both you and Siebel Technical Support should expect to dedicate whatever technical and managerial resources are deemed necessary to resolve the problem.

- Siebel Technical Support will assign an escalation manager as the communication focal point for the issue.
- All plans and status will be relayed through the escalation manager to ensure prompt, accurate, and complete communication.

Best Practices for Service Requests

- **Search** the SupportWeb Knowledge Base to determine if a resolution to your issue already exists or find the recommended diagnostic steps to help you troubleshoot your issue.
- **Identify** the problem area precisely and attempt to isolate the issue. Verify and determine the precise steps to reproduce the issue against the standard Siebel application and database where possible.
- **Utilize** the appropriate diagnostics and attach log files when logging a service request to assist in locating the problem areas.
- **Keep** your implementation projects and system profiles updated and easily accessible to the support engineer at all times. Utilizing tools such as the Siebel Environment Verification Tool (EVT) can allow you to quickly provide relevant environment information.
- **Use** SupportWeb to log, track, and update your technical issues.
- **Complete** the fields in SupportWeb carefully when logging a service request. Selecting the appropriate product area and severity and providing a clear and complete problem description will allow efficient routing of your issue to the best technical resource, help the support engineer isolate the issue, and speed resolution.
- **Provide** any error messages, steps taken prior to logging the service request, diagnostic data, 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 service request.
- **Document** test cases if possible so we can re-create the problem if needed.
- **Be prepared** to have access to all information that a support engineer might need to help in resolving your issue, including log files, administrative access to relevant servers or views within the application, and access to Siebel Tools configuration data.
- **Always** refer to your issue by referencing the assigned SR tracking number.
- **Collaborate** with your support engineer using Oracle Collaborative Support for more efficient information transfer and SR resolution.
- **Take** advantage of Oracle’s transactional surveys by providing your honest and constructive feedback. Our management team reviews all comments and follows up on any low scores received so that we can continually improve the level of service we offer you.

If You Still Need Help

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

Oracle University Siebel Training:

education.oracle.com/transition/ou_site_selection_siebel.html

Implementation Best Practice Tools and Resources:

supportweb.siebel.com/support/private/content/general/customer_care/implementation_best_practices.html

E-mail Technical Support: siebelsupport@oracle.com

Technical Account Management:

supportweb.siebel.com/support/private/content/general/TAMofferings.html

Expert Services:

supportweb.siebel.com/support/private/content/general/ESofferings.html