Oracle® Advanced Support Platform

User's Guide,

Release 3.4 for all platforms

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ORACLE®

Oracle Advanced Support Platform User's Guide, , Release 3.4 for all platforms

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Preface

This guide provides information about how to use Oracle Advanced Support Platform.

Audience

This guide is intended for customer users and customer user administrators using Oracle Advanced Support Platform.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
`http://www.oracle.com/pls/topic/lookup?ctx=acc|amp|id=docacc`.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit
`http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit
`http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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Overview

This chapter introduces the main concepts in Oracle Advanced Support Platform.

It includes the following topics:

- About Oracle Advanced Support Platform
- About Oracle Advanced Support Platform Users
- About Certified and Supported Browsers
- Logging in to Oracle Advanced Support Platform
- About the Oracle Advanced Support Platform User Interface

> **Note:** The **Advanced Monitoring** tab in Oracle Advanced Support Platform provides all the advanced monitoring capabilities of earlier Oracle® Mission Critical Support (MCSP) releases. Account management is now administered on the **Accounts** tab.

About Oracle Advanced Support Platform

Oracle Advanced Support Platform forms the interface between you and Oracle, enabling you to access information through Web browsers and combine information from different sources into a single entry point. Oracle Advanced Support Platform is secure, easy-to-use, and provides access to ITIL-based service application tools and best-practice workflows, enabling users to monitor and manage their infrastructure elements and drive competitive advantage to their core businesses.

Oracle Advanced Support Platform is a fully integrated, ITIL-based operations management framework, including tools, processes, and technology, which is hosted by Oracle and delivered through the Web as a Software-as-a-Service (SaaS).

Oracle Advanced Support Platform capabilities include:

- Easy navigation and reporting functionality
- A customer-generated on-demand reporting engine
- Heterogeneous event monitoring and rules engine for faster problem detection and resolution
- Enhanced security features
- A Configuration Management System (CMS) to support physical and logical devices

Oracle Advanced Support Platform benefits include:

- Efficiencies in service delivery through automated features such as customer setup and management.

- Secure service delivery with full data segregation and access control.

- Improved quality of service through proven ITIL-based processes embedded into the tool workflow.

- Greater flexibility with a customizable and scalable Web-based platform for access anywhere at any time.

About Certified and Supported Browsers

Logging in to Oracle Advanced Support Platform

About the Oracle Advanced Support Platform User Interface

About Oracle Advanced Support Platform Users

Oracle Advanced Support Platform supports the following users:

- A **customer user** is an individual in the customer organization who has been added to Oracle Advanced Support Platform.

- A **customer user administrator (CUA)** is an optional additional assignment to a customer user, giving the ability to grant privileges to other Oracle Advanced Support Platform users in their customer organization.

- A **service provider user** is an Oracle user. Service provider users who have been granted access to a customer or any of the customer resources, such as groups, contracts, or contract line items, can view or manage those resources according to the level of access. For example, service provider users who have been granted access to at least one contract line item for the customer organization can view or manage that contract line item. Service providers can invite one or more customer users to become the CUA for the customer organization.

> **Note:** The terms *service provider* and *provider user* are also used to denote a *service provider user*.

About Customer Users

As a **customer user**, you have basic access privileges to Oracle Advanced Support Platform. Once your details have been added to the Oracle Advanced Support Platform Address Book as a customer user for your organization, you will receive e-mail notification. The account is activated when you log in to Oracle Advanced Support Platform.

As a customer user, you can use Oracle Advanced Support Platform to perform the following tasks:

- View organizations to which you belong

- View your group membership

- View the Address Book for your organization

- View and update your Oracle Advanced Support Platform profile information

About Customer User Administrators

A **customer user administrator (CUA)** is an optional additional privilege that can be granted to you. As an Oracle customer, your organization can have one or more CUAs.

If you are a CUA for your organization, you can add individuals to your Oracle Advanced Support Platform customer address book, thereby creating users accounts for those individuals. You can grant access privileges to your users through a combination of groups, roles, and policies.

In summary, as a CUA, you can use Oracle Advanced Support Platform to:

- View organizations to which you belong

- Manage users and contacts in the Address Book for your customer organization

- Manage groups of users

- View and update your Oracle Advanced Support Platform profile information

About Service Provider Users

A **service provider user** is an Oracle employee who can access Oracle Advanced Support Platform. Service provider users can be granted access to view and manage customer organizations. When requested, service provider users can perform the following tasks on behalf of your organization.

- Manage contracts for your organization

- Invite members of your organization to become customer user administrators (CUAs).

- Add, update, or delete your organization

- Manage roles and view privileges

- View users and contacts for your organization

About Certified and Supported Browsers

This section describes the Web browsers that you can use to access Oracle Advanced Support Platform, including:

- **Certified Web browsers**, which are fully tested and supported by Oracle.

- **Supported Web browsers**, which are supported by Oracle.

The following Web browsers can be used with Oracle Advanced Support Platform:

Web Browser	Versions	Support Type
Mozilla Firefox	3.6 & later, 4.0	Certified
Microsoft Internet Explorer[1]	7, 8, & 9	Certified
Apple Safari	00093.5 & later	Supported
Google Chrome	13.0 & later	Certified

[1] MS Internet Explorer cannot be run in compatibility mode

Logging in to Oracle Advanced Support Platform

Once you have received e-mail notification that your user account has been enabled, log in to the Oracle Advanced Support Platform home page.

> **Note:** If you cannot log in to Oracle Advanced Support Platform or have not received e-mail notification, contact your ITSM.

To log in to Oracle Advanced Support Platform:

1. Open the following Web page:

   ```
   https://amr.oracle.com
   ```

   The Oracle Advanced Support Platform login page appears, displaying your user profile.

2. Modify the following fields as required:

Area	Field	Description
Username	Title	One of the following values: ■ Miss ■ Mr ■ Mrs ■ Ms
	User Type	One of the following values: ■ Provider - for service provider users ■ Customer - for customer users and customer user administrators
	First Name[1]	Your first name
	Last Name[1]	Your last name
	Home Page	URL for your home page
Preferences	Language[1]	Your preferred display language
	Time Zone[1]	Time zone in which you work
	Date Format[1]	Format to be used when displaying dates
	Time Format[1]	Format to be used when displaying time
Contact Information	E-mail Address[1]	Your e-mail address
	Notification	Check this check box to receive notifications from Oracle Advanced Support Platform to this e-mail address
	Phone Numbers	Phone number corresponding to the e-mail address entered
	Type	Type of phone number, having one of the following values: ■ Home ■ Mobile/Cell ■ Office

[1] Mandatory field

3. Add addresses as follows:

   > **Note:** You must add an office address.

   a. Click **Add**.

   The Add New Address window appears.

   b. Enter the following information then click **OK**:

Field	Description
Type	One of the following values:
	- Billing
	- Home
	- Office
	- Other
	- Shipping
Address Line 1	First line of the address, in free text
Address Line 2	Second line of the address, in free text
Address Line 3	Third line of the address, in free text
Postal Code	Post code for the address, if any
City	Name of the city
State or province	Name of the state or province
Country	Select the country from the list

The Profile page reappears, showing the new address in the Addresses pane.

The Profile page reappears, showing the new address in the Addresses pane.

4. Click **Save**.

A hylerlinked message appears, confirming that the login has been successful.

5. Click the hyperlinked success message.

The Oracle Advanced Support Platform home page appears.

6. Click **Advanced Monitoring**.

The Advanced Monitoring page appears.

> **Note:** If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Support Platform, contact your ITSM.

Logging in to Oracle Advanced Support Platform

About the Oracle Advanced Support Platform User Interface

As the Oracle Advanced Support Platform Customer User Administrator (CUA), you manage all Oracle Advanced Support Platform users and contacts for your customer organization(s). Oracle Advanced Support Platform provides the following capabilities:

My Services Tab

The **My Services** tab provides a dashboard view of all your Oracle services. The dashboard presents news, announcements, and other content that has been published for your Oracle services, displayed in the corresponding widget. You can also check delivery plan information for your Oracle services, including start and end delivery dates, service contacts, and any content uploaded specifically for that service.

Accounts Tab

The **Accounts** tab provides account management capabilities for the selected customer. The Contracts page displays a searchable list of the customer's contracts with Oracle.

The Address Book page provides the ability to maintain contact information for the customer's Oracle Advanced Support Platform users and groups. Access to Oracle Advanced Support Platform tabs and resources is governed by a framework of policies and assignments, which can be managed on the Policies and Assignments page. Policies and assignments can be applied to individuals and to groups, which can be defined on the Groups page. Finally, the User Profile page defines personal contact information and preferences for the user.

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Using the My Services Dashboard

This chapter describes how to use the **My Services** dashboard in Oracle Advanced Support Platform.

Related Topics

About the My Services Tab

Viewing My Services

Managing My Content

Viewing My Contacts

About the My Services Tab

The **My Services** tab presents the news, announcements, and other content that has been published for your Oracle services, displayed in the corresponding widget.

Cloud News

This widget shows news about your Cloud Managed Cloud Services, as published by your Oracle Service Delivery Manager (SDM).

My Services

This widget shows information about all services for your organization. On this tab, you can view details of each services, including any content uploaded for that service, and contacts and users associated with each service.

My Contacts

This widget displays all contacts for each service. A contact is an individual involved with your organization's Oracle services and packages whose contact details have been registered in Oracle Advanced Support Platform.

Contacts includes both users, who have Oracle Advanced Support Platform accounts, and other individuals, who personal contact information is held in Oracle Advanced Support Platform but who do not have an Oracle Advanced Support Platform account. Only users, that is, individuals who have been assigned an Oracle Advanced Support Platform account, can access Oracle Advanced Support Platform.

My Content

This widget provides an overview of all announcements, documents, and links uploaded or published for a given service. You can also upload content on the Content page. Your Oracle SDM can publish information and collateral directly to this page from Oracle's internal service delivery system.

My Announcements

This widget displays the last 20 published announcements for your services or customer organization by your Oracle Service Delivery Manager (SDM). These announcements can include changes to and comments on your service plans and associated tasks. Click the hyperlinked announcement name to download and save the annoucement such as content publication. You can also publish content to this widget from the **My Content** widget, described in Managing My Content.

Customer Logo

This widget shows an image that represents your organization. You can upload this image in My Content or your Oracle SDM can also upload this image using the Oracle service delivery system.

Learn More

This widget contains content published by your Oracle SDM to help deepen your understanding of Oracle Advanced Support Platform. All content in this widget is read-only.

You can personalize the **My Services** tab by dragging any of the widgets onto the tab or removing them from the tab, to reflect the information that is of most interest to you. When you log out, the combination you choose is saved then used as the default layout the next time you log in.

Prerequisites

- You must have an Oracle Advanced Support Platform customer user account.

To Customize the My Services Tab:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. On the **My Services** tab, drag any of the following widgets from the right hand area into the Dashboard:

   - **Cloud Service** - This widget shows news about your Cloud Managed Cloud Services, as published by your Oracle Service Delivery Manager (SDM).

   - **My Content** - (Read only) This widget contains content published by your Oracle Service Delivery Manager (SDM) to help you understand and begin to use Oracle Advanced Support Platform. All content in this widget is read-only.

   - **Learn More** - (Read only) This widget contains content published by your Oracle SDM to help deepen your understanding of Oracle Advanced Support Platform. All content in this widget is read-only.

   - **My Services** - This widget provides a summary of service delivery information for all of your organization's Oracle services, including the start and end dates as well as content uploaded specifically for that service.

   - **My Announcements** - This widget displays the last 20 published announcements for your services or customer organization by your Oracle Service Delivery Manager (SDM). These announcements can include changes to and comments on your service plans and associated tasks. Click the hyperlinked announcement name to download and save the annoucement such as content publication. You can also publish content to this widget from the **My Content** widget, described in Managing My Content.

■ **Customer Logo** - This widget shows an image that represents your organization. You can upload this image in My Content or your Oracle SDM can also upload this image using the Oracle service delivery system.

■ **My Contacts** - This widget contains articles and general news about your Oracle service, as published by your Oracle SDM.

Changes are saved when you log out of Oracle Advanced Support Platform.

Viewing My Services

The **My Services** widget displays all your organization's Oracle services. Click any of the services to view information about the service delivery plan, such as announcements that have been made. The information, published by your Oracle Service Delivery Manager (SDM), is drawn directly from Oracle's internal service delivery management system.

Prerequisites

■ You have an Oracle Advanced Support Platform customer user account.

To view a details of a service:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. On the **My Services** tab, go to the **My Services** widget.

   The My Services widget displaysthe following information about each service:

Field	Description
Name	Name of the service
Status	Status of the service plan, being one of the following:
	■ **Draft** means that work has not begun on the plan.
	■ **In Progress** means that work is in progress.
	■ **Cancelled** means that this plan has been cancelled.
	■ **Done** means that this plan has been completed.
Start Date	Date on which service begins, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.
End Date	Date on which service finishes, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.
Last Updated Date	Date on which this service delivery information was last updated.
Content	Details of content items uploaded to this service.

Here, you can:

■ **Filter displayed services** - Click any column name to sort the services displayed by that column. For example, click **Name** to sort alphabetically by name.

   Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

■ **Search services** - In the **Search** field on the menu bar, enter the contact's email address, or first or last name. Oracle Advanced Support Platform automatically completes the string you enter with the first contact that

matches. You can also use the wildcard %. Then click the **Search** icon. The page is refreshed, displaying the service(s) matching the full or partial entry.

Managing My Content

The **My Content** provides a list of all content that has been uploaded or published for each of your Oracle service plans. Click the service name to view details of announcements, documents, and reference links associated with that service plan in Oracle Advanced Support Platform. Your Oracle Service Delivery Manager (SDM) can publish service delivery announcements and content directly to this page from Oracle's internal service delivery system. As a customer administrator, you can also upload content for this service on this tab.

Prerequisites

- You have an Oracle Advanced Support Platform customer user account.

- You have uploaded any content that you want to edit or delete.

To manage service plan content:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. On the **My Services** tab, go to the **My Content** widget.

   The My Content widget displays the following information about each content item:

Field	Description
Title	Title given to the content item when it was uploaded in Oracle Advanced Support Platform.
Description	Description entered for the content item when it was uploaded in Oracle Advanced Support Platform.
Version	Version of the content item in Oracle Advanced Support Platform. When a content item is first uploaded, the version number is 1. For each subsequent upload, the version number increases in increments of 1.
Category	One of the following content categories: ■ Logo ■ Reference ■ Service Deliverable
Status	One of the following content statuses: ■ Pending Review ■ Published
Updated Date	Date on which the content item was uploaded, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.
File Access Type	One of the following file access types: ■ RO - read-only ■ RW - read-write
Size	Size of the content item, in kilobytes. **Note:** For URLs, the size is 0 bytes.

3. Manage the displayed content as follows:

> **Note:** You must be the owner of a content item to edit or delete it.

- **Edit content** - Select a content item, then click **Actions**, followed by **Edit**. Update the displayed fields as required, then click **Save**. The page reappears, with a message that the content item has been updated.

- **Download content** - Select a content item, then click **Actions**, followed by **Edit**. Select **Open**, then click **OK** to open the file in a Web browser. Alternatively, to save the file locally, select **Save** then navigate to the local directory. Finally click **OK**.

- **Delete content** - Select a content item, then click **Delete**. When prompted, click **OK** to confirm that you want to delete the content item. The page reappears, with a message that the content item has been updated.

- **Search for content** - In the **Search** field on the menu bar, enter the contact's email address, or first or last name. Oracle Advanced Support Platform automatically completes the string you enter with the first contact that matches. You can also use the wildcard %. Then click the **Search** icon. The page is refreshed, displaying the contact(s) matching the full or partial entry

Additionally, you can upload content for the selected service as follows:

a. In the Content tray list on the left of the Content page, click **Upload**.

The Upload Content page appears.

b. Enter the following information:

Field	Description
Content type[1]	Select one of the following content types: **File** to upload a file **URL** to store a URL
Category	Check the Customer Logo checkbox if the content item is a customer logo.
File	Click **Browse**, navigate to the file you want to upload, then click **OK**.
Title[1]	Enter the title of the content to be uploaded. **Note** that this title, can differ from the file name, will be used for this content item in Oracle Advanced Support Platform.
Description	Enter a description of the content item
Expiration Date	Click the Calendar icon, then select the date on which this content item will expire, in the format DD-MMM-YYYY where DD is the day, MMM is the month, and YYYY is the year.

[1] Mandatory field

Optionally, click **Next** to add keywords on the next page.

Click **Finish** to save changes.

Viewing My Contacts

The My Contacts widget on the **My Services** tab provides a list of all contacts for your services - that is, all individuals who are involved with Oracle services and packages in your organization. It includes both registered Oracle Advanced Support Platform users, who have a user account and can log in and use Oracle Advanced Support Platform, and other interested partied, such as CTOs, whose contact information has

been registered in Oracle Advanced Support Platform but who cannot access Oracle Advanced Support Platform.

Prerequisites

- You have an Oracle Advanced Support Platform customer user account.

To view service contacts:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. On the **My Services** tab, go to the **My Contacts** widget.

   The My Contacts widget displays the following information about each contact:

Field	Description
Name	Name of the contact
Email	E-mail address for this contact
Primary Phone	Primary phone number for this contact
Cell Phone	Cell phone number for this contact
Type	Type of contact, that is: ■ Technical ■ Management

Here you can:

- **Filter displayed contacts** - Click any column name to sort the contacts displayed by that column. For example, click **Name** to sort alphabetically by name.

  Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

- **Search contacts** - In the **Search** field on the menu bar, enter the contact name. Oracle Advanced Support Platform automatically completes the string you enter with the first contact that matches. You can also use the wildcard %. Then click the **Search** icon. The View Contacts page is refreshed, displaying the contact(s) matching the full or partial entry.

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Using Account Management

This chapter describes how to manage accounts for customer users and customer user administrators (CUAs) in Oracle Advanced Support Platform.

Related Topics

Account Management for Customer Users

Account Management for Customer User Administrators (CUAs)

Account Management for Customer Users

The **Accounts** tab provides account management through links to a number of different pages. The Address Book page displays all your customer contacts and users in Oracle Advanced Support Platform. The Groups page displays groups of which you are a member. Oracle Advanced Support Platform provides the ability to group these users and contacts according to common criteria, such as geographic location.

All Oracle Advanced Support Platform users are assigned roles to enable them to perform different tasks or associated them with a particular Oracle contract. The Policies and Assignments page displays all the policies and assignments, which determine your access to Oracle Advanced Support Platform applications. You can also view all contracts for your organization on the Contracts page.

Finally, the **Accounts** tab provides the ability to manage your Oracle Advanced Support Platform user profile by editing your contact information and preferences.

Viewing Users and Contacts

The Address Book provides the ability to view all your organization's Oracle Advanced Support Platform users and contacts on one page, where:

- A **user** has an account in Oracle Advanced Support Platform, enabling them to access Oracle Advanced Support Platform.

- A **contact** is an individual who is involved with Oracle services and packages whose details have been registered in Oracle Advanced Support Platform. Contacts may or may not have access to Oracle Advanced Support Platform.

On the Address Book page, you can customize the fields display or filter the users displayed by entering filter criteria. You can also search for users using the Search field. The Search field autocompletes search criteria entered, returning the first user in the displayed list that matches the criterion.

Prerequisites
- None.

To view contacts and users:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Customer list in the top right corner of the View Accounts page.

   The View Accounts page reappears, displaying all your services.

3. Click **Address Book** in the left pane.

   The View Contacts page appears, displaying the following information for all contacts:

Field	Description
E-mail	Displays the contact's e-mail address.
Type	Indicates whether the contact is: ■ Management ■ Technical
User Status	Indicates whether the user status is: ■ **Enabled**, where a new Oracle Advanced Support Platform user account has been added and activated. Users with this user status can log in to Oracle Advanced Support Platform. ■ **Migrated**, where an existing account has been migrated to Oracle Advanced Support Platform and activated. Users with this user status can log in to Oracle Advanced Support Platform. ■ **Pending**, where a new Oracle Advanced Support Platform account has been added but the user has not yet activated the account by logging in, or where an existing account has been added to Oracle Advanced Support Platform but again the user has not yet activated the account. ■ **Disabled**, where an Oracle Advanced Support Platform user account has been deactivated. Users with this user status cannot log in to Oracle Advanced Support Platform. ■ **Deleted**, where an Oracle Advanced Support Platform user account has been deleted. Users with this user status cannot log in to Oracle Advanced Support Platform.
Notification Only	Indicates whether contact is a user or non-user
Applications	Specifies the applications that the customer user can access, such as CAM or OMP.
First Name	Displays the contact's first name, as registered in the Oracle Advanced Support Platform address book
Last Name	Displays the contact's last name, as registered in the Oracle Advanced Support Platform address book
Phone Number	Displays the contact's phone number.

4. You can perform the following actions on the View Contacts page:

   > **Note:** Most frequently used operations are displayed under Address Book in the left pane. All the options listed here are available on the menu bar of the View Contacts page.

   ■ **Filter displayed contacts** - Click any column name to sort the contacts displayed by that column. For example, click **Name** to sort alphabetically by name.

Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

- **Search contacts** - In the **Search** field on the menu bar, enter the contact's e-mail address, phone number, type, notification only, user status, applications, or first or last name. You can also use the wildcard %. Then click the **Search** icon. The View Contacts page is refreshed, displaying the contact(s) matching the full or partial entry.

- **Customize the contact page** - Click **Customize Views** to view a list of the columns displayed on the View Contacts page. Visible columns are indicated by a checkmark.

  To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

  To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes, then click **OK** to confirm the changes.

- **View detailed user information** - Click a user name to view more detailed information about the user.

Viewing Groups

Oracle Advanced Support Platform provides the ability to group users in your organization according common criteria, such as geographical location. The **Accounts** tab displays your group memberships.

Prerequisites

- None.

To view groups:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Customer list in the top right corner of the View Accounts page.

   The View Accounts page reappears, displaying all your contacts.

3. Click **Users and Groups** in the left pane. Then click **View Groups**.

   The View Groups page appears, displaying the following information for each of the groups listed:

Field	Description
Name	Displays the group name
Description	Displays a brief description of the group

4. You can perform the following actions on the View Groups page:

   > **Note:** Most frequently used operations are displayed under Users and Groups in the left pane. All the options listed here are available on the menu bar of the View Groups page.

- **Filter displayed groups** - Click any column name to sort the groups displayed by that column. For example, click **Name** to sort alphabetically by name.

  Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

- **Search groups** - In the **Search** field on the menu bar, enter the group's name or description. You can also use the wildcard %. Then click the **Search** icon. The View Groups page is refreshed, displaying the group(s) matching the full or partial entry, but ignoring case.

- **Customize the group page** - Click **Customize Views** to view a list of the columns displayed on the View Groups page. Visible columns are indicated by a checkmark.

  To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

  To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes, then click **OK** to confirm.

Customizing Your User Profile

Oracle Advanced Support Platform provides the ability to update your user profile, including contact information and preferences.

Prerequisites

- You are the Oracle Advanced Support Platform Customer User Administrator for your organization.

To customize your user profile:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Customer list in the top right corner of the View Accounts page.

   The View Accounts page reappears, displaying all contacts.

3. Click **Users and Groups** in the left pane. Then click **User Profile**.

   The User Profile page appears.

4. Modify the following fields as required, then click **Save**.

Area	Field	Description
Username	Title	One of the following values:
		- Miss
		- Mr
		- Mrs
		- Ms
	User Type	
	First Name	Your first name
	Last Name	Your last name
	Home Page	URL for your home page

Area	Field	Description
Preferences	Language	Your preferred display language
	Time Zone	Time zone in which you work
	Date Format	Format to be used when displaying dates
	Time Format	Format to be used when displaying time
Contact Information	E-mail Address	Your e-mail address
	Notification	Check this check box to receive notifications from Oracle Advanced Support Platform to this e-mail address
	Phone Numbers	Phone number corresponding to the e-mail address entered
		Type of phone number, having one of the following values: ■ Home ■ Mobile/Cell ■ Office
Addresses	Add Address	Add postal addresses as required.

The updated User Profile appears, displaying the new information.

Account Management for Customer User Administrators (CUAs)

The **Accounts** tab provides the ability to manage all contacts and users for your organization(s), through links to a number of different pages. The Address Book page displays all your organization contacts and users in Oracle Advanced Support Platform. Here, you can add, update, or delete contact and user records. The Groups page provides the ability to group these users and contacts according to common criteria, such as geographic location.

All Oracle Advanced Support Platform users are assigned roles to enable them to perform different tasks or associated them with a particular Oracle contract. The Policies and Assignments page displays all the policies and assignments, which determine your access and your customer users' access to Oracle Advanced Support Platform applications. You can also view all contracts for your organization on the Contracts page.

Finally, the **Accounts** tab provides the ability to manage your Oracle Advanced Support Platform user profile by editing your contact information and preferences.

Managing Users and Contacts

The Address Book provides the ability to manage all your organization's Oracle Advanced Support Platform contacts on one page:

■ A **user** has an account in Oracle Advanced Support Platform, enabling them to access Oracle Advanced Support Platform.

■ A **contact** is an individual who is involved with Oracle services and packages whose details have been registered in Oracle Advanced Support Platform. Contacts may or may not have access to Oracle Advanced Support Platform.

On the Address Book page, you can update a contact's details or create new Oracle Advanced Support Platform contacts. You can customize the fields display or filter the users displayed by entering filter criteria. You can also search for users using the

Search field. The Search field autocompletes search criteria entered, returning the first user in the displayed list that matches the criterion.

Prerequisites

- The individual is not already a contact for this customer organization in Oracle Advanced Support Platform.

To manage contacts and users:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Customer list in the top right corner of the View Accounts page.

   The View Contracts page reappears, displaying all services for the selected organization.

3. Click **Address Book** in the left pane.

   The View Contacts page appears, displaying the following information for all contacts for the selected organization:

Field	Description
E-mail	Displays the contact's e-mail address.
Type	Indicates whether the contact is: ■ Management ■ Technical
User Status	Indicates whether the user status is: ■ **Enabled**, where a new Oracle Advanced Support Platform user account has been added and activated. Users with this user status can log in to Oracle Advanced Support Platform. ■ **Migrated**, where an existing account has been migrated to Oracle Advanced Support Platform and activated. Users with this user status can log in to Oracle Advanced Support Platform. ■ **Pending**, where a new Oracle Advanced Support Platform account has been added but the user has not yet activated the account by logging in, or where an existing account has been added to Oracle Advanced Support Platform but again the user has not yet activated the account. ■ **Disabled**, where an Oracle Advanced Support Platform user account has been deactivated. Users with this user status cannot log in to Oracle Advanced Support Platform. ■ **Deleted**, where an Oracle Advanced Support Platform user account has been deleted. Users with this user status cannot log in to Oracle Advanced Support Platform.
Applications	Specifies the applications that the customer user can access, such as CAM or OMP.
First Name	Displays the contact's first name, as registered in the Oracle Advanced Support Platform address book
Last Name	Displays the contact's last name, as registered in the Oracle Advanced Support Platform address book

4. You can perform the following actions on the View Contacts page:

   > **Note:** Most frequently used operations are displayed under Address Book in the left pane. All the options listed here are available on the menu bar of the View Contacts page.

- **Update a contact** - Select the contact, then click **Update** to open the Update Contact page. Select Enabled or Disabled status as required (described in step 2), then click **Save**. The View Contacts page reappears, showing the updated details.

- **Add a contact** - To add a contact:

  a. Click **Add**. The Add Contact page appears.

  b. Enter the contact's e-mail address(es) in the E-mail Addresses field.

  c. Select **Management** or **Technical** from the Contact Type list.

  d. Specify the applications that this contact can access.

  e. If required, select **Yes** for the **Is the contact a user?** field.

  f. Click **Save.**

  The View Contacts page reappears, displaying the new contact details with user status Pending. When the request is successful, the user status changes to Active. An Oracle Advanced Support Platform notification is sent to the e-mail address(es) of users, informing the recipient(s) that they have an Oracle Advanced Support Platform account.

- **Filter displayed contacts** - Click any column name to sort the contacts displayed by that column. For example, click **Name** to sort alphabetically by name.

  Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

- **Search contacts** - In the **Search** field on the menu bar, enter the contact's e-mail address, or first or last name. Oracle Advanced Support Platform automatically completes the string you enter with the first contact that matches. You can also use the wildcard %. Then click the **Search** icon. The View Contacts page is refreshed, displaying the contact(s) matching the full or partial entry.

- **Delete a contact** - Select the contact then click **Delete**. When prompted, click **OK** confirm that you want to delete the contact. The View Contacts page reappears without the deleted contact details.

- **Customize the contact page** - Click **View** to view a list of the columns displayed on the View Contacts page. Visible columns are indicated by a checkmark.

  To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

  To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes.

- **View detailed user information** - Click a user name to view more detailed information about the user.

Managing Groups

You can add Oracle Advanced Support Platform users in your organization into groups. This can be useful if you want to group contacts or users according common criteria, such as geographical location.

Prerequisites

■ None.

To manage groups:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Customer list in the top right corner of the View Accounts page.

   The View Contracts page reappears, displaying all contacts for the selected organization.

3. Click **Users and Groups** in the left pane. Then click **View Groups**.

   The View Groups page appears, displaying the following information for each of the groups listed:

Field	Description
Name	Displays the group name
Description	Displays a brief description of the group

4. You can perform the following actions on the View Groups page:

   > **Note:** Most frequently used operations are displayed under Users and Groups in the left pane. All the options listed here are available on the menu bar of the View Groups page.

   ■ **Update a group** - Select the group, then click **Update** to open the Update Group page. Edit the required fields (described in step 2), then click **Save**. The View Groups page reappears, showing the updated details.

   ■ **Add a new group** - To add a new group:

      a. Click **Add**. The Add Group page appears.

      b. Enter the new group names.

      c. In the Group Members pane, click **Add**. The Available Users page appears.

      d. Check the names of the users to be added to this group then click **OK**. The Add Group page reappears.

      e. Click **Save**. The View Groups page reappears, displaying the new group name.

      The View Groups page reappears, displaying the new group details.

   ■ **Filter displayed groups** - Click any column name to sort the groups displayed by that column. For example, click **Name** to sort alphabetically by name.

      Click the same column again to reverse the sort order. Clicking the **Name** column again sorts in reverse alphabetical order.

   ■ **Delete a group** - Select the group then click **Delete**. When prompted, click **OK** confirm that you want to delete the group. The View Groups page reappears without the deleted group details.

- **Customize the group page** - Click **View** to view a list of the columns displayed on the View Groups page. Visible columns are indicated by a checkmark.

  To hide a column, select the column in this list, which removes the checkmark. You can also click **Show All** to show all columns.

  To reorder this list, click **Reorder columns**, then use the arrows to alter the display. Click **Save** to save the changes, then click **OK** to confirm.

Managing Contact Lists

This section describes how to manage contact lists in Oracle Advanced Support Platform.

Contact lists are used by specific processes (such as Incident Management and Change Management) to send notifications, task messages for approval, or informational messages to the designated contacts.

> **Note:** Only users with appropriate permissions are allowed to manage contact lists for their customer organizations.

To manage contact lists:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. From the **Contacts and Contracts** tab, select **Contact Lists**.

   The Contact List Assignments page reappears.

3. From the Contact Lists page, you can perform the following actions:

   -

Add a Contact List

To add a contact list:

1. From the Contact Lists page, click **Add Contact List**.

   The Create Contact List page appears.

2. In the Name box, enter the Contact List name.

3. In the Description box, enter any useful information about the Contact List.

4. Select **Ranking** to provide users with the ability to prioritize the contact list.

5. Click **Save**.

Edit a Contact List

To edit a contact list:

1. On the Contact Lists page, click Edit beside the contact list to be modified. The Edit Contact List page appears.

2. Modify the contact list as required then click **Save**:

   - In the Name box, enter the Contact List name.

   - In the Description box, enter any useful information about the Contact List.

- Select **Ranking** to provide users with the ability to prioritize the contact list.

Delete a Contact List

To delete a contact list:

1. On the Contact Lists page, click **Remove** beside the contact list to be modified.

2. Click **OK** in the Delete Confirmation window to confirm the deletion.

Note: You cannot remove a contact list if it is used by a contact assignment. Before you delete the contact list, you must remove any contact assignments.

For more information about contact list assignments, see Managing Contact List Assignments.

Managing Contact List Assignments

This section describes how to assign a contact to CIs, CI Groups, or directly at the customer level for your customer organizations.

Oracle Advanced Support Platform supports two types of contact lists:

- **System Defined Lists** - Built in contact lists used internally by Oracle Advanced Support Platform, including the e-mail subscriber list for incident management.

  The following table shows all system defined lists:

List	Members receive an e-mail...
CAB Member	Because they are members of the Change Approval Board (CAB)
CM E-Mail Subscriber	For each action on a CM ticket
Escalation	When an Incident ticket is escalated
IM E-Mail Subscriber	For each action on an Incident ticket
IM Local Language Email Subscriber	When a local language note is added to an Incident ticket
IMNOTIF	When a service level agreement (SLA) violation occurs
Notification[1]	To satisfy the service delivery SLA notification commitment
PM E-Mail Subscriber	For each action on a problem management (PM) ticket
Remediation	Because the user has agreed to accept IM ticket ownership for customer-managed components
Service Interrupt	For each action on a service interrupt Incident ticket

[1] Required assigment for all customers

- **User Defined** - Customized contact lists that are specific for your service delivery organization.

Note: Only users with appropriate permissions are allowed to manage the Contact List Assignments for their customer organizations.

To manage contact list assignments:

1. Log in to Oracle Advanced Support Platform.

The Oracle Advanced Support Platform Home page appears.

2. From the **Contacts and Contracts** tab, select **Contact List Assignments**.

    The Contact List Assignments page reappears.

3. From the Customer list, select the required customer organization.

    For the selected customer, you can perform the following tasks:

    - Create a Contact List Assignment
    - Remove a Contact List Assignments

Create a Contact List Assignment

To create a contact list assignment for the selected organization:

1. From the Contact List Type list, select the type of contact list:

    - **System Defined** - Built in contact lists used internally by Oracle Advanced Support Platform.

    - **User Defined** - Contact lists that are specific for your service delivery organization.

    The User Profile page appears.

2. From the Contact List list, select a contact list.

3. To create a contact for the customer organization as follows:

    a. Click **For Customer**.

       The Customer area expands.

    b. Click **Add Member**.

    c. From the Contact list, select the contact to be assigned.

    d. If ranking is allowed for the specified contact list, select the appropriate value from the Rank list.

    e. Click **Add Member.**

       The new contact appears in the list of contacts.

4. To create a contact for CI Group:

    a. Click **For CI Group**.

       The CI Group area expands.

    b. Click **Add Member**.

    c. From the Contact list, select the contact to be assigned.

    d. From the CI Group list, select the required CI group.

    e. If ranking is allowed for the specified contact list, select the appropriate value from the Rank list.

    f. Click **Add Member**.

       The new contact appears in the list of contacts.

5. To create a contact for a specific CI:

    a. Click **For Configuration Item**.

       The For Configuration Item area expands.

  b. Click **Add Member**.

  c. From the Contact list, select the contact to be assigned.

  d. If ranking is allowed for the specified contact list, select the appropriate value from the Rank list.

  e. Click **Add Configuration Items**. The Add CI window appears, providing the following views:

   - **Column View** - Click **Show Columns View** if required, then select the required CIs using the filter lists.

   - **Group View** - Click **Show Group View** to display groups. Select a group from the Smart Groups or Static Groups list.

  f. Click **Add Selected**, then click **Submit**.

  g. Click **Add Member**.

  The new contact appears in the list of contacts.

Remove a Contact List Assignments

To remove a contact list assignment:

1. In the Contact List Assignments page for the selected customer organization, click **Remove** beside the contact assignment that you want to remove.

2. When prompted, click **OK** to confirm the deletion.

The Contact List Assignments page reappears, without the deleted contact assignment.

Viewing Contact List Assignments

Use this procedure to view contact list assignments for the selected customer:

1. Log in to Oracle Advanced Support Platform.

The Oracle Advanced Support Platform Home page appears.

2. From the **Contacts and Contracts** tab, select **Contact List Assignments**.

The Contact List Assignments page reappears.

3. From the Customer list, select the required customer organization.

You can review all assignments for all contact lists configured, including contact list name, scope, CI/CI Group, and Ranking.

> **Note:** Only users with appropriate permissions are allowed to view the contact assignments for their customer organizations.

Customizing Your User Profile

Oracle Advanced Support Platform provides the ability to update your user profile, including contact information and preferences.

Prerequisites
- You are the Oracle Advanced Support Platform Customer User Administrator for your organization.

To customize your user profile:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click the **Accounts** tab, then select your organization name from the Customer list in the top right corner of the View Accounts page.

   The View Accounts page reappears, displaying all contacts for the selected organization.

3. Click **Users and Groups** in the left pane. Then click **User Profile**.

   The User Profile page appears.

4. Modify the following fields as required, then click **Save**.

Area	Field	Description
Username	Title	One of the following values: ■ Miss ■ Mr ■ Mrs ■ Ms
	User Type	
	First Name	Your first name
	Last Name	Your last name
	Home Page	URL for your home page
Preferences	Language	Your preferred display language
	Time Zone	Time zone in which you work
	Date Format	Format to be used when displaying dates
	Time Format	Format to be used when displaying time
Contact Information	E-mail Address	Your e-mail address
	Notification	Check this check box to receive notifications from Oracle Advanced Support Platform to this e-mail address
	Phone Numbers	Phone number corresponding to the e-mail address entered
		Type of phone number, having one of the following values: ■ Home ■ Mobile/Cell ■ Office
Addresses	Add Address	Add postal addresses as required.

The updated User Profile appears, displaying the new information.

4

Using Contracts and Contacts

This chapter describes how to manage accounts for customer users and customer user administrators (CUAs) in Oracle Advanced Support Platform.

Related Topics

About Contracts and Contacts

Contracts and Contacts provides the ability to manage association between contract line item and configuration item, contract line item is configured in Account Management. It also provides the ability to manage contact list, contact list assignments and contact assignments.

Related Topics

Managing Contract Line Item Assignments

This section describes how to link configuration items (CIs) to contracts using line items in Oracle Advanced Support Platform.

> **Note:** You must have the appropriate permissions to manage contracts for your organization(s).

To manage contact lists

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Contacts and Contracts** tab, select **Contracts**.

   The Contracts page appears.

4. From the Customer list, select the customer name.

   The Contracts page, reappears, displaying all contracts associated with the selected customer.

5. Click **View** in the contract line.

   The Contract Line Item page appears, displaying contract line details information and linked CIs.

   On this page, you can:

   - **Add a CI /CI Group**: Click **Add CI/CI Group**, then select one or more CIs/CI Groups from the list that appear. Click **Save**. The Contract Line Item page reappears, displaying the added items.

   - **Delete a CI/CI Group**: Click **Remove** beside CI/CI Group you want to remove, then click **OK** to confirm the deletion.

Viewing Contact Lists

This section describes how to manage contact lists in Oracle Advanced Support Platform.

Contact lists are used by specific processes (such as Incident Management and Change Management) to send notifications, task messages for approval, or informational messages to the designated contacts.

> **Note:** Only privileged service delivery users with appropriate permissions will manage Contact Lists for their organizations.

To view contact lists:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Contacts and Contracts** tab, select **Contact Lists**.

   The Contact Lists page appears. This page lists all the Contact Lists created for your service delivery organization.

Managing Contact Lists

This section describes how to manage contact lists in Oracle Advanced Support Platform.

Contact lists are used by specific processes (such as Incident Management and Change Management) to send notifications, task messages for approval, or informational messages to the designated contacts.

> **Note:** Only users with appropriate permissions are allowed to manage contact lists for their customer organizations.

To manage contact lists:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. FFrom the **Contacts and Contracts** tab, select **Contact Lists**.

   The Contact Lists page appears. This page lists all the Contact Lists created for your service delivery organization.

4. From the Contact Lists page, you can perform the following actions:

   - Add a Contact List
   - Edit a Contact List
   - Delete a Contact List

Add a Contact List

To add a contact list:

1. From the Contact Lists page, click **Add Contact List**.

   The Create Contact List page appears.

2. In the Name box, enter the Contact List name.

3. In the Description box, enter any useful information about the Contact List.

4. Select **Ranking** to provide users with the ability to prioritize the contact list.

5. Click **Save**.

Edit a Contact List

To edit a contact list:

1. On the Contact Lists page, click Edit beside the contact list to be modified. The Edit Contact List page appears.

2. Modify the contact list as required then click **Save**:

   - In the Name box, enter the Contact List name.
   - In the Description box, enter any useful information about the Contact List.
   - Select **Ranking** to provide users with the ability to prioritize the contact list.

Delete a Contact List

To delete a contact list:

1. On the Contact Lists page, click **Remove** beside the contact list to be modified.

2. Click **OK** in the Delete Confirmation window to confirm the deletion.

> **Note:** You cannot remove a contact list if it is used by a contact assignment. Before you delete the contact list, you must remove any contact assignments.
>
> For more information about contact list assignments, see Managing Contact List Assignments.

Managing Contact List Assignments

This section describes how to assign a contact to CIs, CI Groups, or directly at the customer level for your customer organizations.

Oracle Advanced Support Platform supports two types of contact lists:

- **System Defined Lists** - Built in contact lists used internally by Oracle Advanced Support Platform, including the e-mail subscriber list for incident management.

    The following table shows all system defined lists:

List	Members receive an e-mail...
CAB Member	Because they are members of the Change Approval Board (CAB)
CM E-Mail Subscriber	For each action on a CM ticket
Escalation	When an Incident ticket is escalated
IM E-Mail Subscriber	For each action on an Incident ticket
IM Local Language Email Subscriber	When a local language note is added to an Incident ticket
IMNOTIF	When a service level agreement (SLA) violation occurs
Notification[1]	To satisfy the service delivery SLA notification commitment
PM E-Mail Subscriber	For each action on a problem management (PM) ticket
Remediation	Because the user has agreed to accept IM ticket ownership for customer-managed components
Service Interrupt	For each action on a service interrupt Incident ticket

[1]   Required assigment for all customers

- **User Defined** - Customized contact lists that are specific for your service delivery organization.

    > **Note:** Only users with appropriate permissions are allowed to manage the Contact List Assignments for their customer organizations.

To manage contact list assignments:

1. Log in to Oracle Advanced Support Platform.

    The Oracle Advanced Support Platform Home page appears.

2. Click **Advanced Monitoring**.

    The Advanced Monitoring page appears.

3. From the **Contacts and Contracts** tab, select **Contact List Assignments**.

    The Contact List Assignments page reappears.

4. From the Customer list, select the required customer organization.

For the selected customer, you can perform the following tasks:

- Create a Contact List Assignment
- Remove a Contact List Assignments

Create a Contact List Assignment

To create a contact list assignment for the selected organization:

1. From the Contact List Type list, select the type of contact list:

   - **System Defined** - Built in contact lists used internally by Oracle Advanced Support Platform.
   - **User Defined** - Contact lists that are specific for your service delivery organization.

   The User Profile page appears.

2. From the Contact List list, select a contact list.

3. To create a contact for the customer organization as follows:

   a. Click **For Customer**.

   The Customer area expands.

   b. Click **Add Member**.

   c. From the Contact list, select the contact to be assigned.

   d. If ranking is allowed for the specified contact list, select the appropriate value from the Rank list.

   e. Click **Add Member.**

   The new contact appears in the list of contacts.

4. To create a contact for CI Group:

   a. Click **For CI Group**.

   The CI Group area expands.

   b. Click **Add Member**.

   c. From the Contact list, select the contact to be assigned.

   d. From the CI Group list, select the required CI group.

   e. If ranking is allowed for the specified contact list, select the appropriate value from the Rank list.

   f. Click **Add Member**.

   The new contact appears in the list of contacts.

5. To create a contact for a specific CI:

   a. Click **For Configuration Item**.

   The For Configuration Item area expands.

   b. Click **Add Member**.

   c. From the Contact list, select the contact to be assigned.

    d. If ranking is allowed for the specified contact list, select the appropriate value from the Rank list.

    e. Click **Add Configuration Items**. The Add CI window appears, providing the following views:

    - **Column View** - Click **Show Columns View** if required, then select the required CIs using the filter lists.

    - **Group View** - Click **Show Group View** to display groups. Select a group from the Smart Groups or Static Groups list.

    f. Click **Add Selected**, then click **Submit**.

    g. Click **Add Member**.

    The new contact appears in the list of contacts.

Remove a Contact List Assignments

To remove a contact list assignment:

1. In the Contact List Assignments page for the selected customer organization, click **Remove** beside the contact assignment that you want to remove.

2. When prompted, click **OK** to confirm the deletion.

   The Contact List Assignments page reappears, without the deleted contact assignment.

Viewing Contact List Assignments

Use this procedure to view contact list assignments for the selected customer:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Contacts and Contracts** tab, select **Contact List Assignments**.

   The Contact List Assignments page reappears.

4. From the Customer list, select the required customer organization.

   You can review all assignments for all contact lists configured, including contact list name, scope, CI/CI Group, and Ranking.

   > **Note:** Only users with appropriate permissions are allowed to view the contact assignments for their customer organizations.

5

Using Configuration Management System

This chapter describes the Configuration Management System (CMS) in Oracle Advanced Support Platform. It covers the following topics:

- About Configuration Management System
- Using the CMS Browser
- About the Configuration Item Dashboard
- Viewing or Modifying CI Attributes
- Viewing CI Facilities
- Viewing Vendor Support Contracts

> **Note:** If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Support Platform, contact your Oracle Advanced Support Platform customer user administrator.

About Configuration Management System

The Configuration Management System (CMS) constitutes a set of tools and databases that are used to manage the configuration data of a customer's IT infrastructure and services. The CMS contains data about users, suppliers, locations, business units, and customers.

The CMS Browser provides a set of tools for quick searching, viewing, and managing customizable sets of Configuration Items (CIs).

The ability to manipulate configuration data is controlled by roles and privileges and is primarily the domain of Oracle. Customer user privileges are most often focused on read-only and reporting activities.

Key Features and Benefits

The key features and benefits of CMS include the following:

- Identifies Customer Assets

    Enables you to tack and manage physical and logical assets. These assets are identified within the CMS as Configuration Items (CIs). CIs can be further combined into CI Groups to aggregated identification.

- Manages Customer Assets

Enables you to search for CIs based on multi-criteria conditions, save search conditions, retrieve Level of Service (LOS) information for CIs associated with a detected event, and view customer level statistics associated with a CIs.

- Enables export to CSV or MS Excel format

  You can export lists of configuration items (along with their properties) to CSV and MS Excel format to be fed into other systems or for later analysis. This provides flexibility in viewing configuration items and enables their use in external systems such as billing systems.

- Enables inventory views and management level summarized views

  The CMS Browser page provides multiple customizable filtering options, as well as shows configuration item groups and a list of filtered results.

- Provides the required level of information

  The CMS System Dashboard shows the hierarchy of configuration items, and users are able to drill down to the required level of information.

CMS Dependencies

You can access CMS through Oracle Advanced Support Platform and use it to manage CIs and their relationships. CMS feeds this CI and CI Group information to support the operations of Incident Management, Change Management, and the Event Dispatcher.

CMS and Incident Management

CMS assists Incident Management by:

- Providing valuable information about how much of the IT infrastructure is affected.

- Providing up-to-date information about customers, owners and status of CIs.

- Assisting with identification of incidents of similar CI type.

CMS and Change Management

CMS assists Change Management by:

- Enabling you to choose CIs and assets as targets of a change.

- Providing CMS relationship information to assess the potential impact on end-users and the IT infrastructure when a particular CI is taken offline.

- Providing up-to-date information about customers, owners and status of CIs.

CI Relationships

A relationship defines the link between two CIs. Relationships represent the dependencies and connections between the entities in a customer's IT environment. The same attributes defined for CI types are defined for relationships also.

CMS defines a set of rules that governs the creation of relationships between CIs to ensure that only valid relationships are created.

Implied/Contextual Relationships

Contextual relationships are those that are created based on the context of the user when creating a new CI. For example, a computer system to operating system

relationship is always contextual. The user never explicitly creates a relationship between the two items. Instead, the relationship is inferred based on the computer system that was visible when the user clicks the **add operating system** link. The table below outlines the contextual relationships that are supported by the CMS.

We can consider that the graph of implied relationships for a set of related CIs is a tree.

Source Class	Target Class	Description
Physical System	Large systems	Large systems such as Exadata, are installed on a physical system. Physical elements can be nested to form trees.
Computer System	Operating System	An operating system is installed on a computer system. The computer system item may represent a physical or a virtual machine.
Operating System	Application	An application is installed on an operating system. Most applications are only valid within the context of an operating system.
Computer System	Application	An application that is installed on a computer system. This covers a subset of applications, which are not considered operating systems, which can be installed directly onto a computer system. Examples include hypervisor software like xVM Server and VMWare. Service processor firmware can also be modeled this way.

Explicit Relationships

Explicit relationships are relationships between configuration items that must be explicitly created by the end users. The user will choose the source configuration item, the relationship type, and the target configuration item.

Source Class	Target Class	Description
Computer System	Computer System	Clustered
Location	Location	Models the location hierarchy. For example, a building contains a room.
Location	Computer System	A particular location contains a computer system.
Service	Computer System	Business service is hosted by computer system.
Computer System	Operating System	OS is running on computer system.
Service	Application	Business service is implemented by software application.

CMS Browser User Interface Overview

This section provides a description of the CMS Browser controls and features that enable Oracle Advanced Support Platform users to access and manage their Configuration Items (CIs).

The scope of actions available to you in CMS Browser depends on your organization:

- Service delivery users can access CIs that belong to their customers and can manage CIs they are authorized to access.

■ Customer users can access their own CIs only. Customer users are allowed to search and view detailed information on their own CIs only.

Figure 5–1 provides an example of the CMS Browser page. The following sections explain the three main areas of the page:

■ Filter Area

■ Groups Area

■ Filtered Results Table

Figure 5–1   CMS Browser

Filter Area

Use the Filter option to select multiple CIs based on multiple criteria. There are four filters in CMS Browser. Each filter consists of the following elements:

■ List of filter parameters

– Status

 Status of the CI, such as Staging, Production, or Retired.

– Category

Category of the CI, such as Physical Element, Computer System, Application System, Operating System, or Service.

– CI Name

Name of the CI.

– Make

The vendor or manufacturer for the CI, such as Oracle or IBM.

– Model

The model of the CI, such as Sun Fire E25K. This option depends on the value of the Make parameter.

– Type

The type of CI, such as Server or UNIX.

> **Note:** You can specify multiple filter parameters in any order. For each filter, the set of options displayed in the list depends on the previously selected filter options

- The Filter text box

  To refine your search, enter a desired value in the Filter text box

- List of items that match the specified conditions

  Select an item to reduce the results

- Show Result link

  Select an item from the list and then click **Show Result**.

  The system displays the CIs for the selected item in the Filtered Results table.

Groups Area Use the Groups option to group CIs. Instead of managing inventory as a set of individual CIs, you can group them together logically and associate functions or attributes at the group level. This minimizes CMS administration work and increases data quality in CMS.

The Groups option contains the following two group types:

- Smart CI Groups

  Smart CI groups are defined by a set of criteria. Oracle Advanced Support Platform maintains the exact list of CIs automatically in each smart group. In the CMS Browser, these group names are displayed in the Smart Groups page in the Groups area.

- Static CI Groups

  Static CI groups are defined by the exact list of CIs. Users must add or remove CIs manually to the Static CI groups. In the CMS Browser, these group names are displayed in the Static Groups page in the Groups area

Filtered Results Table

The result set of CIs that meets the filtering criteria or belongs to the selected CI group. Click any column to reorder the list. Click the name of the CI to access the Configuration Item Dashboard. From the Configuration Item Dashboard, you can view or modify the CI information. For more information about the Configuration Item Dashboard, see About the Configuration Item Dashboard.

Using the CMS Browser

CMS Browser provides Oracle Advanced Support Platform users with a variety of ways to locate and access CIs using both filtering and grouping features.

CMS Browser enables you to perform a number of tasks including the following:

- Search and View Configuration Items
- Export CI Information to Spreadsheets

Search and View Configuration Items

Use this procedure to search for CIs you are authorized to access. Use a set of filters that enables you to customize the search criteria to fit your requirements based on one or more CI parameters. Use the following CI parameters as search criteria:

Parameter	Value
CI Name	Name of a CI.
Customer	Name of a customer associated with the CI.
Type	Type of CI
Status	Staging, Production, Retired, Lab, No service.
Category	Computer System, Application System, Operating System, Service.
Make	CI vendor or manufacturer: Sun, Oracle, IBM, HP, and so on.
Model	CI model, for example, Sun Fire E25K, Ultra 20, and so on.

> **Note:** The current list of CI parameters will be extended in future product releases.

To search and view a CI:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **CMS** tab, select **CMS Browser**.

   The CMS Browser page appears.

4. Select the type of search criteria. You can search by filtering using a CI parameter (default) or using the IP address.

   To search using a filter:

   a. Ensure that the **Search By Filter** check box is selected (default).

   b. From the filter list, select the appropriate CI parameter.

   c. In the Filter box, enter the parameter value (or its part) to narrow the search.

      A list of items meeting the filter criteria appear.

   d. In the list, click the item you want to use to narrow the search criteria.

   e. To apply the current filter criteria, click **Show Results**, or move to the next filter to specify the next search criteria.

   To search using an IP address, select the Search enter the

   a. Check the **Search By IP Address** check box.

   b. In the IP Address box, enter part or all of the IP address.

5. After you set and apply all required filter parameters, click **Show Result**.

   The list of CIs meeting your search criteria appears in the Filtered Results table. You can view the following information for each CI:

- Customer

- CI Name

- Status

- IP Address

- Type

- Make/Model

- Category

6. From the CI Name column, click the name of the CI that you want to view.

   The Configuration Item Dashboard page appears with information about the selected CI.

Export CI Information to Spreadsheets

CMS Browser enables you to export lists of CIs parameters to CSV or Microsoft Excel format.

To export CI data to Excel or CSV format:

1. Search for CIs you want to export as described in Search and View Configuration Items.

2. From the Filtered Results table, select the CIs to be exported. Click **Select All** if you want to export all the CIs from the table.

3. Depending on the required format, click **excel** or **csv**.

4. Select the **Open with** option to review the CI data, or the **Save File** option to save the file, and then click **OK**.

About the Configuration Item Dashboard

The Configuration Item Dashboard provides Oracle Advanced Support Platform users with the ability to view and administer their CIs.

This section describes the following tasks:

- Using the CI Tree

- Viewing CI Parameters

- Viewing CI Groups

- Viewing Vendor Support Contracts

- Checking Production Readiness

- Viewing the Properties of a CI

- Viewing CI Attachments

Using the CI Tree

The Configuration Item Dashboard displays the CIs for the selected system in a hierarchal tree in the upper left of the page as shown in Figure 5–2.

The Physical Element is a top-level CI, and Computer Systems, Operating System, Application Systems, and Services are the subordinates.

Figure 5–2   Configuration Item Tree
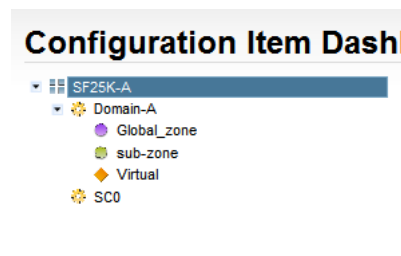
Viewing CI Parameters

When you select a CI from the CI tree, Oracle Advanced Support Platform displays the information about that CI in the Details area of the Configuration Item Dashboard page. In this area, you can view both mandatory and optional CI attributes, such as name, category, and status.

Checking Production Readiness

Use the Production Readiness area to check if the selected CI is ready for production. It uses the following icons to provide status information:

✓	The specified requirement is met and is ready for production.
❗	The specified requirement is not met and must be completed successfully before production.

Viewing Tickets

Use the Tickets area to view any Incident tickets or Change Management (CM) tickets associated with the selected CI.

Viewing IP Addresses

Use the IP Addresses area to view IP Addresses for a Computer System CI. The IP Address is associated with a Computer System and is the same for all its subordinate CIs.

Viewing Type of Service and Level of Service

Use the Type of Service area to view the Type of Service (TOS) and Level of Service (LOS) assigned to the selected CI.

Viewing the Properties of a CI

Use the Properties area to view and manage additional properties for the selected CI. Oracle Advanced Support Platform contains a predefined list of properties for a service delivery organization. For each property, Oracle Advanced Support Platform indicates whether the property is visible to service delivery users only or to all users.

Viewing the Location of a CI

Use the Location area to view the facility assigned to the selected CI. From the **Select Facility ...** list, you can change the location of the CI.

Viewing Vendor Support Contracts

Use the Vendor Support Contracts area to view the vendor support contracts associated with the selected CI. Click **Create Vendor Support Contract** to add a vendor support contract to the list.

Viewing Protocol Services

Use the Protocol Services area to view the protocols assigned to a CI. A CI can have one or more assigned protocols depending on the actions that a user can perform in the JumpGate application, or the level of security required for this CI.

Viewing CI Groups

Use the CI Groups area to view the list of CI Groups to which the selected CI is assigned. You can create a static group or add an existing group to the list.

Viewing CI Attachments

Use the Attachments area to view and download files associated with the selected CI. Click **Add Attachment** to attach a file to the selected CI.

Viewing CI Parents

Use the Parent area to view a parent of the selected CI. You can change the parent for your Physical Element CIs and Computer System CIs. From the **Select Parent ...** list, select a new parent, then click **Set**. For other CIs, Oracle Advanced Support Platform creates the parent automatically and it cannot be changed.

> **Note:** You can remove a CI as a parent, that is, unparent a CI by selecting an empty entry from the **Select Parent ...** list.

> **Note:** Only Physical Elements can be parents. Physical Elements can have other Physical Elements as Parents.

Viewing or Modifying CI Attributes

To view CI attributes from the Configuration Item Dashboard:

1. Locate the required CI following the steps in the Search and View Configuration Items section.

2. From the Filtered Results table, click the CI Name you require.

   The Configuration Item Dashboard page appears with the information of the selected CI.

3. From the Configuration Item Dashboard page, click the CI you want to view or modify.

> **Note:** The view in the hierarchy list depends on your user role in Oracle Advanced Support Platform.

Viewing CI Facilities

The Facilities page enables you to do the following tasks:

- View a Facility
- View Cages and Racks

View a Facility

To view CI facilities:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **CMS** tab, select **Facilities**.

   The Facilities page appears.

4. Use the Name, State, or Country columns to reorder the results.

View Cages and Racks

To view and update the cage and racks:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **CMS** tab, select **Facilities**.

   The Facilities page appears.

4. Locate the facility containing the required cage and racks, then click **Cages and Racks**.

   The Cages and Racks page appears.

5. From the Facility list, select the facility where the cage is located.

6. From the Cage list, select the cage where the rack is located.

7. From the Rack list, select the required rack.

   Oracle Advanced Support Platform displays the rack configuration, showing you the slots to which the CIs are assigned.

Viewing Vendor Support Contracts

This section describes how to view contracts between customers and external vendors to support CIs monitored by Oracle. A Vendor Support Contract contains all the information required to connect to a particular external vendor including a list of CIs covered by the contract.

To view Vendor Support Contracts:

1. Log in to Oracle Advanced Support Platform.

The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

    The Advanced Monitoring page appears.

3. From the **CMS** tab, select **Vendor Support Contracts**.

    The Vendor Support Contracts page appears.

4. Locate the required contract and click the vendor's name.

    The View Vendor Support Contract page appears where you can review the information on the selected contract.

6

Using Incident Management

This chapter describes incident management in Oracle Advanced Support Platform. It covers the following areas.

- About Incident Ticket Management
- Searching Incident Tickets
- Viewing Incident Tickets
- Creating Incident Tickets
- Printing Incident Tickets

> **Note:** If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Support Platform, contact your Oracle Advanced Support Platform customer user administrator.

About Incident Ticket Management

When service impacting events occur in an IT environment and require intervention and communication, Oracle Advanced Support Platform captures and manages this data within the Incident Management. Incident Management enables a service delivery user to create, route, update, resolve, and close incident tickets. In addition, all incident tickets created from Event Management are available in Incident Ticket Management.

Ticket Management Dependencies

You can access Incident Ticket Management through Oracle Advanced Support Platform and use it to identify faults in the IT infrastructure. The effective management of incidents is a complex process that requires interaction with many other service management functions, most notably the Change Management and Knowledge Management services. This integration enables you to effectively resolve incidents by rapidly pinpointing their sources and providing controlled implementation of required changes.

Incidents and Change Management

The Change Management service assists Incident Management by:

- Providing information about current and future change activity, as well as change history
- Providing controlled implementation of changes

- Providing up-to-date information to customers on progress of change

For example, a request for change (RFC) may be raised to modify the system by resolving the known error identified by the Incident Management service.

Incidents and Configuration Item Management

The Configuration Item Management service assists Incident Management by:

- Providing valuable information about how much of the IT infrastructure is affected

- Providing up-to-date information on customers, owner and status of Configuration Items (CI)

- Assisting with identification of incidents of similar CI type

Searching Incident Tickets

Use this procedure to search for open Incident Tickets. The fields displayed on the Search Incident Ticket page depend on the authorization associated with your Oracle Advanced Support Platform login.

To search for incident tickets:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Incident** tab, select **Search IM Tickets**.

   The Search IM Ticket page appears similar to .

Figure 6–1   Search IM Ticket Page

4. Use any of the following criteria to search for an Incident Ticket:

Search Criteria	Description
Ticket ID	The Incident Ticket ID

Search Criteria	Description
Ticket Summary	The Incident Ticket summary
Knowledge ID	The knowledge base reference ID
Ticket External Ref ID	The reference ticket ID from an external ticketing system
CI/CI Group Name	The name of the CI or CI Group associated with the Incident Ticket
Ticketed Only	
Use Time Frame	Select **Use Time Frame** if you want to search within a predefined time period, such as the last 24 hours.
Creation Date (Start)	Use the calendar icon to select a start date to create a time period within to search. **Note**: This field is unavailable if you select **Use Time Frame**.
Creation Date (End)	Use the calendar icon to select a end date for a time period within to search. **Note**: This field is unavailable if you select **Use Time Frame**
Time Frame	Select a predefined time period within to search. **Note**: This field is available only if you select **Use Time Frame**
Ticket Status	From the Ticket Status area, you can refine the search to select specific ticket status: ■ Cancelled ■ Closed ■ Draft ■ On Hold ■ Pending Assignment ■ Resolved ■ WIP
Ticket Severity	From the Ticket Severity area, you can refine the search to select tickets with specific severities.
Service Interruption	The service interruption
Customer	Select the customer name from the list.
Ticket Tag	Select any tags that you want to associate with the search.

5. Select **Search IM Ticket**.

   The processing time for any search varies depending on the size of the data file being searched. To decrease processing time, narrow the search by using multiple search fields.

6. Oracle Advanced Support Platform displays the results in the Ticket Search Results table.

   You can choose to display 5, 10, 20, 30, 50, or 100 tickets per page. 10 tickets per page is the default. Re-sort the data by clicking any column heading.

   Where a ticket lists one or more MOS SR IDs, click the hyperlinked MOS SR ID to view details of the selected SR in MOS.

   Note that you can click **Printable Page** then use your browser's print function to print the contents of this page. For more details, see Printing Incident Tickets.

Viewing Incident Tickets

Use this procedure to view an Incident Ticket.

1. Log in to Oracle Advanced Support Platform.

    The Oracle Advanced Support Platform Home appears.

2. From the Search IM Ticket page, search for Incident tickets as described in "Searching Incident Tickets".

3. To view an Incident Ticket, locate the Incident Ticket, then click **View**.

    The View IM Ticket page appears for the selected Incident Ticket with the WorkLog subpage open. Note that you can click the **Print Ticket** icon then use your browser's print function to print the contents of this page. For more details, see Printing Incident Tickets.

4. Review the information on the View IM Ticket page as required.

5. Select the following subpages and review the related information.

    ■   Ticket Detail

    ■   Eventlog

    ■   Attachments

Creating Incident Tickets

Use this procedure to create an Incident Ticket manually. Create an Incident Ticket to document a deviation from an expected standard of operation. After creating the Incident Ticket, you can investigate potential solutions. When you have identified a solution, you can record it on the incident. If resolving the incident involves creating a problem or work order you can create it directly from the Incident Ticket. You can also specify the target configuration items (CIs) that are impacted by the incident.

> **Note:**   You must be a service delivery engineer to create an Incident Ticket manually.
>
> Sources such as Oracle Advanced Support Platform or an event generated from the Event Management system or external applications can generate Incident Tickets automatically.

To create an Incident Ticket:

1. Log in to Oracle Advanced Support Platform.

    The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

    The Advanced Monitoring page appears.

3. From the **Incident** tab, select **Create IM Tickets**.

    The Create IM Ticket page appears.

4. On the Create IM Ticket page, define the following information in the Details area:

    a. From the Customer list, select the customer organization for which the Incident Ticket is being created.

b. In the MOS SR IDs field, optionally enter mulitple My Oracle Support (MOS) service request (SR) numbers. This field uses free text.

c. In the Ext Ref ID box, enter a ticket reference number created by a third-party ticketing system, if applicable.

d. From the Severity list, select one of the following severities:

- Customer site is unable to provide services critical to the customer's business, or a preventative action is required to avoid the customer site from becoming unable to provide service critical to the business of the customer. Immediate action is required to resolve the incident.

- Customer site is functioning but impaired (for example, Web pages loading slowly or one of multiple, high-available systems are down).

- Warnings triggered or back-end interruption of service, but no client disruption or impact to business.

- Tuning: Indicates that the incident severity level must be reevaluated.

> **Note:** If the incident ticket is generated automatically from an event, Oracle Advanced Support Platform populates this field with the value selected by the Support Center engineer through the Event Manager console.

e. View the Source to find out how the issue was reported, for example, through the Portal from an event generated by the Event Management system or through an external application. Oracle Advanced Support Platform populates this field automatically with the source specified as Portal when you manually create an Incident Ticket.

5. In the Description area, define the following information:

a. In the Summary box, enter a summary of the incident. (Maximum of 80 alphanumeric characters).

> **Note:** If the incident ticket is generated from an event, Oracle Advanced Support Platform populates this field from information collected from the event summary. You can edit the summary detail.

b. In the Description box, optionally enter a full description of the incident.

6. In the Configuration Items area, complete the following to add any CIs impacted by the Incident if required:

a. Click **Add**.

The Select CIs window appears. For information about selecting CIs, see Search and View Configuration Items.

7. From the Tags list, select tags to classify the Incident Ticket.

8. When you are finished creating an Incident Ticket, you have the following options:

a. Click **Save as Draft**. Oracle Advanced Support Platform performs the following actions on the saved Incident Ticket:

- Saves the ticket in the database.

- Adds the creation date to the ticket.

- Assigns an ID to the ticket.

- Advances the ticket to Draft status.

    b. Click **Submit**. Oracle Advanced Support Platform performs the following actions on the Incident Ticket you submitted:

- Assigns an ID to the ticket.

- Creates an audit trail of all activities performed on the ticket.

- Creates a Worklog entry for ticket creation

- Notifies the customer by e-mail. The e-mail notification has an embedded hyperlink to the incident ticket.

- Advances the ticket to Pending Assignment status. However, if you specified an owner, then the system advances the ticket to the WIP status.

Printing Incident Tickets

Use this procedure to print an Incident Ticket.

To print an Incident Ticket:

1. Log in to Oracle Advanced Support Platform.

The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

The Advanced Monitoring page appears.

3. From the **Incident** tab, select **Search IM Tickets**.

The Search IM Tickets page appears.

4. Locate the Incident Ticket, then click the **Print Ticket** icon.

The Print IM Ticket page appears for the selected Incident Ticket in a new window, displaying the following information:

- Ticket Detail

- WorkLog

- EventLog

- Attachments

5. Use your browser print function to print the Incident Ticket.

7

Using Change Management

This chapter describes change management capabilities in Oracle Advanced Support Platform.

It covers the following topics:

- About Change Management

- Creating Change Management Tickets

- Searching Change Management Tickets

- Viewing Change Management Tickets

- Updating Change Management Tickets

- Assigning Change Management Tickets

- Submitting Change Management Tickets

- Scheduling Change Management Tickets

- Approving Change Management Tickets

- Creating and Managing an Approval Matrix

- Starting Change Management Tickets

- Completing Change Management Tickets

- Closing a Change Management Ticket

- Cancelling Change Management Ticket

> **Note:** If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Support Platform, contact your Oracle Advanced Support Platform customer user administrator.

About Change Management

Change Management enables you to manage changes from the initial request to the final review. You can use the Change Management service to:

- Raise and record Change Management (CM) requests

- Assess the impact, cost, benefit and risk of a change

- Obtain proper approval for CMs

- Manage the implementation of the CM

- Monitor and report on the implementation

- Review and close CMs

The Change Management system manages all configuration items (CIs) associated with a customer account. In fact, any asset that exists in the customer production environment and is part of the monitored and managed services within Oracle Advanced Support Platform is placed under change control.

Example of Simple Recurring CM ticket

The figure below illustrates an example of a simple recurring CM ticket given the following parameters: Recurring flag set = Yes | Start time =10am | Duration =1 day | No end date

The expected outcome, once these parameters are set, is for the CM ticket to recur every day and indefinitely during the same two hour time frame.
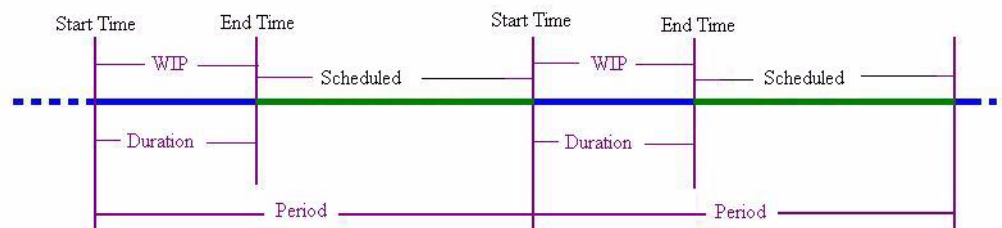
Creating Change Management Tickets

Use one of the following procedures to create a Change Management (CM) ticket. When you create a CM ticket, you specify several attributes that define the type and scope of the change and its classification. You can also specify the target CIs and assets of the change and other information that helps define the change. A CM ticket proposes a change that you want made to one or more CIs that are registered to the Configuration Management System (CMS) in Oracle Advanced Support Platform. The CM ticket sets the change process in motion.

> **Note:** Recurring maintenance activity must be added as recurring change requests by setting the Recurring flag to **Yes**. Oracle Advanced Support Platform sends an automated e-mail when a recurring maintenance CM ticket is initially submitted, approved, and when the final instance of the CM ticket is completed.
>
> The status of recurring CM tickets alternates between WIP (work-in-progress) and SCHEDULED until the final instance is completed. For information about recurring tickets, see Example of Simple Recurring CM ticket.

You can create a CM ticket using one of the following methods:

- Create a New Change Management Ticket
- Clone a Change Management Ticket

Create a New Change Management Ticket

Use this procedure to create a new CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Change** tab, select **Create CM Tickets**.

   The Create CM Tickets page appears.

4. In the Change Identification area, define the following information:

   a. From the Change Priority list, select the priority level, which determines the relative importance of the change in relation to other outstanding change requests:

      – Planned: Changes that follow the usual change management process, often referred to as work requests.

      – Urgent: Unplanned changes that are expedited and managed outside of the standard CM process, and may require to be implemented outside of the regular change maintenance window.

      Note: Urgent changes are worked through the Control Center usually but not always.

      – Emergency: Changes resulting from incidents that impact the customer environment. Emergency CM tickets are implemented in real time, with approval not being necessary if the impact of the fix is less than or equal to the current impact to the customer environment.

      Note: For Emergency CM tickets, customer approvals are bypassed and Oracle Advanced Support Platform notifies the support center by e-mail. You must enter the related Incident Ticket ID on the CM page before you can submit an Emergency CM ticket.

      ---

   b. From the Change Category list, select the category of the CM ticket. The category determines the difficulty and impact of the CM ticket:

      – Major: Major changes to system functionality.

      – Minor: Has low impact and requires few resources.

      – Standard: Follows established and documented approach.

   c. From the Classification list, select the area that indicates the origin of the changes:

      – Build: Indicates changes from implementation or pre-production

      – Customer - *OMP area*: Indicates changes from the customer relating to a specific area of OM Platform.

      – Support - *OMP area*: Indicates changes from the Oracle Service Delivery team relating to a specific area of OM Platform.

   d. From the SubClass list, select a subclass to associate the classification selected in step c. For example, if you selected Customer - Account Management in step c, then the possible subclass values are:

- – Account Information Changes - Address, Contacts
- – Knowledge Article - Add, Delete, Update
- – User Accounts - Add, Invite, Delete Update

5. In the Requestor area, define the following information:

   a. From the Owner list, select the individual responsible for the CM ticket (accepting requests for change and following established processes to implement the changes).

   > **Note:** The Owner is a registered user in Oracle Advanced Support Platform, but the implementer of the CM ticket might not be a registered user.

   b. From the Implemented By list, select who is responsible for the individual implementation steps, including building and testing the change. The follownng options are available:

   c. From the Approval Matrix list, optionally select an approval matrix.

   This list contains all your defined approval matrixes which use one of the following models:

   Customer Wide - Applies to all CMS for that customer.

   Implemented by Oracle - Applies to tickets implemented by the Advanced Monitoring team.

   Implemented by Customer - Applies to tickets implemented by the customer.

   d. Enter the user name of the person responsible for implementing the CM ticket.

   e. In the Implementer Contact box, enter the contact information for the person responsible for implementing the CM ticket.

   f. In the Support Resource box, enter the user name of the named support resource assigned to the CM ticket.

   g. In the Contact Info box, enter the contact information for the named support resource.

   h. From the Risk list, select the risk level associated with implementing the CM ticket. Choose one of the following options:

   - – High: Major business impact or high user impact.
   - – Medium: Minor impact to application and users and easy to back out.
   - – Low: Routine day-to-day changes with minimal impact.

6. In the Description area, define the following information:

   a. In the Summary box, enter a descriptive title for the CM ticket being submitted. Use words that will aid in future searches and to link this CM ticket to others like it. ((Maximum of 80 alphanumeric characters.)

   b. In the Description box, enter a clear and concise description of the change including the nature and scope of the work to be performed

   c. In the Reason For Change box, enter a description of the reason for the change you want made.

7. In the Configuration Items area, identify the configuration items impacted by the change.

   a. Click **Add**.

      The Select CI(s) window appears.

   b. From the filter list, select the appropriate CI parameter.

   c. In the list, click the item you want to use to narrow the search criteria.

   d. To apply the current filter criteria, click **Show Results**, or move to the next filter to specify the next search criteria.

      The list of CIs matching your search criteria appears in the Filtered Results area.

   e. Select the required CI, then click **Add Selected**.

   f. Repeat these steps until you have all the required CIs, then click **SUBMIT**.

       The Create CM page appears with a new row in the CI & CI Group table.

8. In the Change Information area, define the following information as required:

   ■ Filter

      Select **Filter** to filter events for the CIs associated with this CM ticket from the Support Center screens. Events for the associated CIs will be ignored during the change process.

   ■ Timing is Critical

      Select **Timing is Critical** to enable Oracle Advanced Support Platform to display a warning about impacts on the change process. When this option is selected, the scheduled period for implementation cannot be modified once the ticket has been approved. To reschedule the ticket, it must be reapproved.

   ■ Monitoring Impacted

      Select **Monitoring Impacted** to indicate that monitoring services are impacted as a result of this change request.

   ■ Inventory Impacted

      Select **Inventory Impacted** to indicate that inventory (CIs) are impacted as a result of this change request.

   ■ Backups Impacted

      Select **Backups Impacted** to indicate that backup services are impacted as a result of this change request.

9. In the Scheduling area, define the following information:

   Note: You must have appropriate privileges to enter the scheduling information for the CM ticket you are creating. Otherwise, you cannot enter scheduling information.

   ---

   a. Set **Recurring** to either Yes or No depending on whether the CM ticket requires recurring maintenance.

      You can create a recurring ticket to implement repetitive and planned tasks, such as backups and regular reboots, for CIs.

If you indicate that the CM ticket is recurring, then Oracle Advanced Support Platform filters alerts for the specified CIs.

> **Note:** The status for recurring change requests alternates between WIP and Scheduled until the final scheduled implementation task is completed.

If you selected Yes, then enter the following information:

- In the Recurring Period box, enter how often the CM ticket requires maintenance and select the unit of time from the list.

- Set **Infinite Recurring** to Yes or No depending on whether the CM ticket requires maintenance infinitely. If you select No, then the Recurring End Date field appears.

- In the Recurring End Date box, click the Calendar icon beside the Recurring End Date box. In the Calendar, select the date on which recurring maintenance on the CM ticket will end.

b. In the Requested Date box, click the Calendar icon beside the Requested Date box. In the Calendar, select the date that the change was requested, then click **Apply**.

> **Note:** Oracle Advanced Support Platform displays the local time zone abbreviation beside the date. This time zone is set from the **My Preferences** menu item in **Accounts**. For more information, contact your Oracle Support representative.

c. In the Scheduled Start Date box, click the Calendar icon beside the Scheduled Start Date box. In the Calendar, select the date on which work on the change request will begin, then click **Apply**.

> **Note:** Oracle Advanced Support Platform displays the local time zone abbreviation beside the date. This time zone is set from the **My Preferences** menu item in **Accounts**. For more information, contact your Oracle Support representative.

d. In the Scheduled Duration box, enter the amount of time scheduled to complete the CM ticket and select the unit of the time from the list.

e. Click the time zone link beside Local Timezone for DST Calculation to set the local time zone for Daylight Saving Time (DST). Oracle Advanced Support Platform displays a confirmation window, reminding you that this setting is for DST calculations only. Click **OK** to continue.

10. In the Related Tickets area, define the following information:

a. In the Related Incident ID box, enter the ID of the related Incident ticket.

b. In the External ID box, enter the ID of an external related ticket from a third-party ticketing system.

11. In the Plan area, define the following information if required:

a. In the Implementation Plan box, describe how the CM ticket will be implemented.

b. In the Test Plan box, describe how the CM ticket will be tested including detailed test scenarios, expected results, actual results, pass or fail.

c. In the Backout Plan box, describe how to restore back to the original state if the implementation plan fails

d. In the Dependencies box, list the items that are required and their relationships, which are dependent on each other and potentially impact each other during the CM ticket implementation.

12. You can save the CM ticket as a draft or submit the CM ticket.

■ To save the CM ticket, click **SAVE AS DRAFT**.

Oracle Advanced Support Platform performs the following actions on the CM ticket you created:

– Saves the CM ticket in the database.

– Adds the name of the submitter and the submission date to the CM ticket.

– Assigns an ID to the CM ticket.

– Advances the CM ticket to Draft status.

– Notifies the Change Implementer.

The e-mail notification contains an embedded hyperlink to the CM ticket.

■ To submit the CM ticket, click **SUBMIT**.

Oracle Advanced Support Platform performs the following actions on the CM ticket you created:

– Saves the CM ticket in the database.

– Adds the name of the submitter and the submission date to the CM ticket.

– Assigns an ID to the CM ticket.

– Advances the CM ticket to the next step in the work flow.

– Notifies the following parties:

Change Implementers

Change Owner

Change Requester

E-mail Subscriber List

The e-mail notification contains an embedded hyperlink to the CM ticket.

Clone a Change Management Ticket

Cloning enables you to copy an existing CM ticket to create a new CM ticket for a customer organization. When you clone a CM ticket, Oracle Advanced Support Platform displays the Create CM Ticket page with all the fields pre populated from the existing CM ticket you cloned. You must review the information on the page and modify the data as appropriate.

To clone a CM ticket:

1. Log in to Oracle Advanced Support Platform.

The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Change** tab.

   The Change Management page appears.

4. Locate the CM ticket that you want to clone, then click **View** or **Update**.

   The View CM Ticket or Update CM Ticket page appears.

5. Click **CLONE**.

   The Create CM Ticket page appears with the information copied from the existing CM ticket you cloned.

   > **Note:** Oracle Advanced Support Platform does not copy any time or date information or schedule-related data from the existing CM ticket. Therefore all values are cloned except BCC E-mails, Scheduling, Worklog, and Attachments.

6. Review and modify the information on the Create CM Ticket page as required. For more information about the data on this page, see Create a New Change Management Ticket.

7. You can save the CM ticket as a draft or submit the CM ticket.

   ■ To save the CM ticket, click **SAVE AS DRAFT**.

   Oracle Advanced Support Platform performs the following actions on the CM ticket you created:

   – Saves the CM ticket in the database.

   – Adds the name of the submitter and the submission date to the CM ticket.

   – Assigns an ID to the CM ticket.

   – Advances the CM ticket to Draft status.

   – Notifies the Change Implementer.

      The e-mail notification contains an embedded hyperlink to the CM ticket.

   ■ To submit the CM ticket, click **SUBMIT**.

   Oracle Advanced Support Platform performs the following actions on the CM ticket you created:

   – Saves the CM ticket in the database.

   – Adds the name of the submitter and the submission date to the CM ticket.

   – Assigns an ID to the CM ticket.

   – Advances the CM ticket to the next step in the work flow.

   – Notifies the following parties:

      Change Implementers

      Change Owner

      Change Requester

E-mail Subscriber List

The e-mail notification contains an embedded hyperlink to the CM ticket.

Searching Change Management Tickets

Use this procedure to search for CM tickets. The displayed results depend on your role within Oracle Advanced Support Platform.

To search for a CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Change** tab, select **Search CM Ticket**.

   The Search CM Ticket page appears similar to Figure 7–1.

Figure 7–1   Search CM Ticket Page

4. From the Search CM Ticket page, you can use any of the following criteria to search for a CM ticket:

Search Criteria	Description
Ticket ID	CM ticket ID
Related Incident ID	Related Incident ticket ID if applicable
External ID	Reference ticket ID from an external ticketing system
CI Name	Name of a CI associated the CM ticket
CI Group Name	Name of a CI Group associated with the CM ticket
Date Type	Select the type of date by which you want to search.
Time Frame	Select a predefined time period within to search.
Begin Date	Use the Calendar icon to select a start date to create a time period within which to search. **Note**: The Begin Date is available only when you select **Custom** from the Time Frame list.

Search Criteria	Description
End Date	Use the Calendar icon to select an end date for the time period within which to search.
	Note: The End Date is available only when you select **Custom** from the Time Frame list.
Ticket Status	Select the status of the CM ticket or select **All** to search for CM tickets of all status.
Recurring	Select whether you want to search for recurring CM tickets, nonrecurring CM tickets, or both.
Implementer	Enter the name of the implementer to associate with the search.
Customer	Customer related to the CM ticket
Owner	Select the CM ticket owner that you want to associate with the search.
	Note: This list is populated with all owners associated with the customer you selected.
	If a user is set to Inactive, then that user will not appear in the list. For information about inactive users, contact your Oracle Support representative.

5. Click **SEARCH**.

    The processing time for any search varies depending on the size of the data file being searched. To decrease processing time, narrow the search by using multiple search fields.

    Oracle Advanced Support Platform displays the results in the Ticket Search Results table. You can choose to display 5, 10, 20, 30, 50, or 100 tickets per page. 10 tickets per page is the default.

6. Re-sort the results by clicking the Ticket ID column or the Creation Date column.

Viewing Change Management Tickets

To view a CM ticket:

1. Log in to Oracle Advanced Support Platform.

    The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

    The Advanced Monitoring page appears.

3. Click the **Change** tab.

    The Change Management page appears.

4. Select a CM ticket to view using any of the following methods:

    ■   The Change Management page displays a list of CM tickets pending action from which you can choose. Click the ticket number or **View**.

    ■   Use the Search feature as described in Searching Change Management Tickets. From the Ticket Search Results area, click the ticket number or **View**.

    The CM ticket page appears with the selected CM ticket information.

5. Review the information on the CM ticket page as required.

> **Note:** If any of the CIs associated with the CM ticket are deleted since the ticket was created, then the CI name will have a line through its name. Click the callout icon beside the CI name to view the following information about the deleted CI:
>
> - UUID
> - Name and deletion date
> - IP Addresses
> - Location
> - Customer Name
>
> For information about deleting CIs, see Using the CMS Browser.

6. Select the WorkLog tab from the top of the CM ticket page.

    The WorkLog page appears.

7. Review the information on the Worklog page as required.

8. Select the Attachments tab from the top of the CM ticket page.

    The Attachments page appears.

9. Review the attached files on the Attachment page as required.

Updating Change Management Tickets

Use this procedure to update a CM ticket. Information in a CM ticket is often revised during the life cycle of the CM ticket. Among other changes to a CM ticket, you can update the status for a CM ticket and log comments in your CM ticket to track its progress, add or delete CIs from a CM ticket, assign the CM ticket to an individual or group who will implement the change, schedule a CM ticket for implementation, and add attachments to the CM ticket.

> **Note:** Users with the appropriate privileges can select a CM ticket to update. When you select a CM ticket to update, Oracle Advanced Support Platform displays actions that you can perform on the CM ticket such as submit, approve, schedule and cancel.
>
> Some actions, such as approval, are restricted to specific user authorizations

To update a CM ticket:

1. Log in to Oracle Advanced Support Platform.

    The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

    The Advanced Monitoring page appears.

3. Click the **Change** tab.

    The Change Management page appears.

4. Select a CM ticket to view using any of the following methods:

- The Change Management page displays a list of CM tickets pending action from which you can choose, then click **Update**.

- Use the Search feature as described in Searching Change Management Tickets. From the Ticket Search Results area, click the ticket number or **Update**.

The Update CM ticket page appears.

5. Update the information on the Ticket Details subpage as required.

For information about this page, see Create a New Change Management Ticket.

Note: If any of the CIs associated with the CM ticket are deleted since the ticket was created, then the CI name will have a line through its name. Click the bubble icon beside the CI name to view the following information about the deleted CI:

- UUID

- Name and deletion date

- IP Addresses

- Location

- Customer Name

For information about deleting CIs, see Using the CMS Browser.

---

6. From the top of the CM ticket page, select the WorkLog tab.

The WorkLog page appears.

7. To add a worklog entry (available only to users with the appropriate privileges), do the following:

   a. Select **New Entry**.

   A free-text box appears.

   b. Add your worklog entry in the text field as appropriate. The free text field enables you to track the progress of the CM ticket throughout its life cycle.

   c. Click **ADD** to add your worklog entry to the CM ticket. If you receive any errors, make the necessary corrections, and then submit your entry again. After successfully adding your entry, Oracle Advanced Support Platform does the following:

   – Updates the CM ticket with your worklog entry

   – Displays your entry in the Worklog List at the bottom of the page

   – Notify the CM ticket's subscriber list and customer contact by e-mail.

   d. If appropriate, add another worklog entry. You can create as many worklog entries as required.

   e. After adding the worklog entries, click **UPDATE**.

8. From the top of the page, select the Attachments tab.

The Attachments page appears.

9. On the Attachments page, do the following:

a. Review the files that are displayed for the CM ticket. Click **View** to view the file.

b. If required, attach a file to the ticket. Click **Add Files** to attach a file to the CM ticket.

c. After reviewing the attached files, click **UPDATE**.

Assigning Change Management Tickets

Use this procedure to assign an implementer to a CM ticket. A CM ticket may be implemented by either a service delivery engineer or an end-user.

> **Note:** The CM ticket assignment sends an automated e-mail to the appropriate service delivery approver, who must review and approve the CM ticket before it can be scheduled for implementation. If the ticket has been re-assigned to a new Change Implementer, then the system notifies both the former and current Implementers.

To assign the CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Change** tab.

   The Change Management page appears.

4. On the Change Management page, find the CM ticket you want to assign, then click **Update**.

   The Update CM Ticket page displays.

5. Locate the Implemented By field, and if it set to Customer or Multiple Parties, then enter the name of the individual responsible for performing the implementation tasks.The individual does not have to be a registered user in OM Platform.

6. Once the appropriate assignment is made, click **UPDATE**.

   At this point, the CM ticket is ready to be approved or scheduled for implementation depending on whether this CM ticket is implemented by the Oracle service delivery engineer or by the customer.

7. The action of assigning the CM ticket causes Oracle Advanced Support Platform to do the following:

   - Check that all mandatory fields are populated with valid data.

   - Save the CM ticket in the database.

   - Update the CM ticket Worklog with the assignment entry.

   - If the CM ticket is implemented by the Oracle service delivery engineer, Oracle Advanced Support Platform updates the CM ticket status to Pending Approval and sends an e-mail notification to the assigned implementer. If the CM ticket is implemented by the customer or multiple parties, Oracle Advanced Support Platform updates the CM ticket status to Pending Scheduling.

Submitting Change Management Tickets

The CM ticket is in Draft status, which means that the CM ticket has been created and saved, but not submitted. You can submit a CM ticket by selecting the CM ticket you want to submit and clicking Update. You must have the appropriate privileges to create and submit a CM ticket. In addition, you can submit a CM ticket only if you've entered valid information in all mandatory fields.

> **Note:** For Emergency CM tickets, you are required to enter the Related Incident Ticket ID on the CM ticket page before you can successfully submit the CM ticket.

To submit a CM ticket:

1. Log in to the Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Change** tab.

   The Change Management page appears.

4. Locate the CM ticket you want to submit (look for tickets with the status set to Draft); then click **Update**.

   The Update CM Ticket page appears.

5. Ensure that information required to process the CM ticket is entered for the CM ticket. For information about the mandatory fields and valid data required to submit the CM ticket, see Creating Change Management Tickets.

6. Click **SUBMIT**.

   The Change Management application initiates the Submit work flow. After you submit the CM ticket, correct any errors that are displayed by the submit workflow. If necessary, resubmit the CM ticket.

   The action of submitting a CM ticket causes the system to:

   - Check that all mandatory fields are populated with valid data.

   - Save the CM ticket in the database.

   - Add the Submitter Name and Date to the CM ticket.

   - Assign an ID to the CM ticket.

   - Notify the following: Change Implementer(s), Change Owner, Change Requester and E-mail Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.

   - Advance the CM ticket to the next step in the work flow.

Scheduling Change Management Tickets

Use this procedure to schedule a CM ticket for automatic implementation. CM tickets can be scheduled to start either automatically by the system or manually by clicking the Start action button. Changes are scheduled for automatic implementation to

accommodate business needs or resource constraints; on the other hand you may need to manually start an implementation immediately for an emergency CM ticket.

You may also schedule CM tickets for automatic implementation to occur on a regular basis (recurring CM ticket). You can create a recurring CM ticket to implement repetitive and planned tasks, such as backups and regular reboots, on configuration items. You can specify an hourly, daily or weekly change recurring period.

> **Note:** You must have the appropriate privileges to schedule a CM ticket.

Before you begin:

- To schedule the CM ticket, the ticket must be in the Pending Scheduling status.
- If the CM ticket is implemented by the Oracle service delivery engineer, then the service delivery engineer must review and approve the change before it can be scheduled.

To schedule a CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Change** tab.

   The Change Management page appears.

4. Locate the CM ticket you want to schedule (look for CM tickets with the status set to Pending Scheduling); then click **Update**.

   The Update CM Ticket page appears.

5. Make sure the CM ticket has been assigned to a service queue and/or person responsible for the individual implementation steps. (The CM ticket must be assigned before you can schedule it). For more information, see Assigning Change Management Tickets.

6. In the Change Information area, specify whether to filter events for the impacted Configuration Items by selecting **Filter**.

   During the change window specified, CM tickets with filtering selected will cause all events associated with the affected CIs to be filtered from reaching the Event Manager screens. When the work is completed, the support engineer may either manually set the CM ticket status to Completed or the system sets it to Completed when the scheduled duration time is reached. Once in a Completed status, all events are again shown on the Event Manager console screens.

7. In the Scheduling area, enter the information that is needed to set the implementation schedule for the CM ticket.

   a. Set **Recurring** to either Yes or No depending on whether the CM ticket requires recurring maintenance.

      You can create a recurring CM ticket to implement repetitive and planned tasks, such as backups and regular reboots, on configuration items.

If you indicate that the CM ticket is recurring, then Oracle Advanced Support Platform filters alerts for the specified CIs.

Note that the status for recurring CM tickets alternates between WIP and Scheduled until the final scheduled implementation task is completed.

b. In the Scheduled Start Date field, click the Calendar icon beside the Start Date field.

c. In the Calendar window, specify the date you want to start implementing the CM ticket; then click **Apply**.

d. In the Scheduled Duration field, enter the duration for implementing the CM ticket by typing a numeric value and then selecting the time unit from the drop-down window in minutes, hours, or days. NOTE: You may set the Scheduled Duration to 0 (zero).

e. Click **Schedule** when you are satisfied with the schedule.

Oracle Advanced Support Platform performs the following:

– Set the CM ticket status to Scheduled

Oracle Advanced Support Platform waits for start date specified in the Scheduled Start Date field. Once the start date is reached, the CM ticket status is automatically changed to WIP for the duration specified in Scheduled Duration field. After the specified duration, the CM status is automatically changed to Completed. During the WIP period, you may edit the CM ticket and manually change the CM ticket status to Complete by clicking the Complete button.

– Add a Worklog entry for scheduling.

– Trigger the timer for implementation and update the Implementation Start and End Date fields with the actual start and complete time for the CM ticket. The fields are automatically populated by the system when the CM ticket status is updated to WIP and Completed; the fields cannot be edited.

– Notify the following: Change Implementer(s), Change Owner, Change Requester, Change Approver, and E-mail Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it. Note: No notification is sent to the e-mail subscriber list for CM tickets scheduled as recurring.

Note: When the CM ticket is scheduled, you may click **START** to start implementing the change ahead of the scheduled time. Oracle Advanced Support Platform changes the CM ticket status to WIP and adds an entry in the CM ticket Worklog. You can complete the CM ticket manually by clicking **Complete**.

Useful Information

The following table provides useful information about scheduled CM tickets.

Rescheduling a CM ticket	You can modify both the Scheduled Start Time and Duration period for a scheduled CM ticket.
	Note: The Scheduled Start Date cannot be modified once the CM ticket moves to the WIP status.

Completing a Recurring CM ticket between iterations	You can modify the end date and time to the current time. Click the Save button once you've updated the time period.
Updating the ScheduledStartDate	You can set the Scheduled Start Date to a date that is either in the future or to a time that has already past.
	Setting the Scheduled Start Date to a Future time: If you set the Scheduled Start Date to a future time; then CM ticket status remains in the Scheduled status until the implementation period is reached.
	Setting the Scheduled Start Time to a Past time: If you modify the Scheduled Start Date to a past time, and then click the Save button, the system changes the CM ticket status to either WIP or Completed depending on whether the duration period has been reached. For example:
	■ If you modify the Scheduled Start Date to a past time, but the Duration period has not yet been reached; then the system sets the CM ticket status to WIP. The Implementation Start Date is automatically populated to the current time and the implementation End Date is left blank as it is still waiting for the CM ticket to complete.
	■ If you modify the Scheduled Start Date to a past time, and the Duration period has been reached; then system changes the CM ticket status to Completed and populates the implementation Start Date and End Date with the completed time.
Updating the Scheduled Duration Period	You can update the Scheduled Duration period while the ticket is in the WIP status. You may also choose to set the Scheduled Duration to 0 (zero).
	Click the Save button once you've updated the Scheduled Duration period. The system will do the following:
	■ If the Implementation Start Time AND the new Scheduled Duration period is reached, then the system updates the CM ticket status to Completed and adds an entry in the Worklog for the completed CM ticket.
	■ If the Implementation Start Time AND the new Scheduled Duration period is not reached, then the CM ticket remains in the WIP status. The system moves the CM ticket to the Completed status once the new Scheduled Duration period is reached. You can choose to manually move the CM ticket to the Completed status at any time by clicking the Complete button.

Approving Change Management Tickets

Note: You must have the appropriate privileges to approve a CM ticket.

Use this procedure to review and approve a CM ticket that will be implemented by the service delivery engineer. An approval process helps to ensure that your proposed actions are in tune with company or department strategy, and entitled based on contract with the customer. The Change Management service application provides a structured, process-oriented workflow for approving a CM ticket.

A CM ticket must be approved if the party responsible for a CM ticket's individual implementation steps, including building and testing the change, is the service delivery engineer. For example, if you select Advanced Monitoring Team in the CM ticket's Implemented By field, then the CM ticket must be approved before it can be scheduled. In addition, a CM ticket must be in the Pending Approval status before it

can be Approved. Once approval occurs, the CM ticket is then an Approved CM ticket and can be scheduled.

> **Note:** After you approve a CM ticket, you cannot edit some of the ticket information such as Description, Reason For Change, and Filter.

> **Note:** A *Multiple Approval CM Ticket* is a ticket which chooses an Approval Matrix for the approval process.

To approve a Multiple Approval CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Change** tab.

   The Change Management page appears.

4. On the Change Management page, find the CM ticket you want to approve (look for CM tickets with the status set to Pending Approval); then click **Update**.

   The Update CM Ticket page appears.

5. On the Update CM Ticket page, review the details for the CM ticket and then do one of the following:

   a. Select **APPROVE** to approve the CM ticket. The action of approving a CM ticket causes Oracle Advanced Support Platform to do the following:

      – Check that all mandatory fields are populated with valid data.

      – Save the CM ticket in the database.

      – Update the CM ticket Approval log with the approval action and name of the user who approved the CM ticket.

      – Notify only the required level approvers, in ascending order of seniority. For example, first, level 5 approvers are notified. Once they have approved (or otherwise), level 4 approvers are notified, and so on. Finally, the most senior approvers (level 1) are notified.

      – Advance the CM ticket to the Pending Scheduling status. When you click Approve, the Change Management service application starts the Approve work flow. Correct any error conditions indicated by the workflow, and then approve the CM ticket again, if needed. After you successfully approve the CM ticket, it status will be PENDING SCHEDULING.

   b. Select **REJECT**. The action of rejecting a CM ticket causes the system to:

      – Save the CM ticket in the database

      – Update the CM ticket Approval log with the reject action, reason, and name of the user who rejected the ticket

      – Notify only the required level approvers, in order of seniority. For example, first level 5 approvers are notified. Once they have approved (or

otherwise), level 4 approvers are notified, and so on. Finally, the most senior approvers (level 1) are notified.

– Reverts the CM ticket back to the Draft status

The ticket proceeds to a new status when one of the following conditions is true:

■ All approvers have completed approval or rejection the ticket:

– If all levels approved the ticket, the ticket moves to the Pending Scheduling status.

– If at least one level rejected the ticket, the ticket reverts to Draft status.

■ One of the most senior approvers has approved or rejected the ticket with the **Expedite CM** checkbox checked:

– If this approver approved the ticket, it moves to Pending Scheduling status.

– If this approver rejected the ticket, it reverts to Draft status.

■ A user with Manage Approval permission and who is not in the associated approval matrix has approved or rejected the ticket:

– If the user approved the ticket, it moves to Pending Scheduling status.

– If the user rejected the ticket, it reverts to Draft status.

Creating and Managing an Approval Matrix

Reviewing and approving a change request is very sensitive and sometimes need multilevel approval. Oracle Advanced Support Platform provides the ability to define your own multi-level approval matrix.

Once an approval matrix has been defined, all newly created CM tickets and all existing pending approval CM tickets follow the approval matrix. Approvers are also notified when a CM ticket is newly created or pending their approval. A CM ticket is approved when all approvers have approved. A CM ticket is rejected when all approvers have decided and any one has rejected the ticket.

Top level approvers, (that is, level 1 approvers) can bypass all others' approval decisions regardless of whether others approve or reject the CM ticket.

Additionally, you can add multiple approval matrices, then select the relevant matrix from a list on the Oracle Advanced Support Platform home page.

To create an approval matrix:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Change** tab, select **Approval Matrix**.

   The Approval Matrix page appears, displaying one of the following:

   ■ An existing draft matrix, where one has been defined.

   ■ A blank draft matrix, where no matrix has been defined previously.

4. Update the following information:

- **Name** - Enter the matrix name. This is unique for the customer.

- **Model** - Select one of the following matrix model options:

  Customer Wide - Applies to all CMS for that customer.

  Implemented by Oracle - Applies to tickets implemented by the Advanced Monitoring team.

  Implemented by Customer - Applies to tickets implemented by the customer.

- **Environmental Type for CI Group** - Select the environmental type for the CI group from the list.

5. Update the draft approval matrix as follows:

   - **Add a New Level** - to add a new approval level, click this link.

   - **Remove This Level** - to remove an approval level, select the level then click this level.

   - **Add Selected Users to this Level** - to add users to an approval level, select the users then click this link.

   - **Remove Selected Users** - to remove users, click the red ′**X**′ beside each user.

   Note that each level provides the following Strategy options:

   - **Consensus** - Select this option to require that all approvers listed at this level approve the CM.

   - **Representative** - Select this option to require that a single approver at this level.

6. When you have completed all changes, check the red check box at the top of the page.

   All newly created CM tickets and all existing pending approval CM tickets now follow this approval matrix.

Starting Change Management Tickets

A CM ticket can be started either automatically by the system or manually by selecting the Start action button. You use the Start action for CM tickets that need to be started immediately, such as Emergency CM tickets.

After a CM ticket is scheduled, you may click the Start button to start implementing the change ahead of the scheduled time; otherwise the system automatically starts the implementation once the Start Date scheduled for a CM ticket is reached.

> **Note:** You cannot use the Start action on a recurring CM ticket. Recurring CM tickets must always be scheduled.

Before you begin:

- The CM ticket must be in the Scheduled status before you can Start the work period for a CM ticket.

- Make sure you have the appropriate privileges to start a CM ticket.

To manually start a CM ticket:

> **Note:** Before you can manually start the CM ticket, you must make sure to enter valid values in the start date and time fields as well as the Schedule Duration field. Please note that if you manually start a CM ticket, the system will start the duration timer and follow the duration value as specified in the Scheduled Duration field.

1. Log in to Oracle Advanced Support Platform, click the **Advanced Monitoring** tab, then navigate to the Change menu. The system displays the Change Management page.

2. On the Change Management page, find the CM ticket you want to start implementing (look for CM tickets with the status set to Scheduled); then click Update. The Update CM Ticket page displays.

3. On the Update CM Ticket page, ensure that the CM ticket has been assigned to a service queue and/or person responsible for the individual implementation steps. (The CM ticket must be assigned before you can schedule it):

    a. If the Implementer Queue field is displayed, select the service queue responsible for the individual implementation steps.

    b. In the Implementer field, type the name of the individual responsible for performing the implementation tasks.

4. In the Scheduling area, make sure the CM ticket has been scheduled:

    a. In the Scheduled Start Date field, click the Calendar icon beside the Start Date field. The system displays the Calendar pop-up window.

    b. In the Calendar window, specify the date you want to start implementing the change request; then click Apply.

    c. In the Scheduled Duration field, enter the duration for implementing the change by typing a numeric value and then selecting the time unit from the drop-down window in minutes, hours, or days. NOTE: You may set the Scheduled Duration to 0 (zero).

5. Click the Start button to start implementing the change ahead of the scheduled time. When you click Start, the Change Management service application initiates the Start work flow. If you receive any errors, make the necessary corrections, and then start the CM ticket. After successfully starting the CM ticket, its status will change to WIP.

6. The action of starting a CM ticket causes the system to:

    ■ Check that all mandatory fields are populated with valid data.

    ■ Save the CM ticket in the database.

    ■ Update the CM ticket Worklog with the name of the user who started the CM ticket.

    ■ Advance the CM ticket to the WIP status.

    ■ Notify the following: Change Implementer(s), Change Owner, Change Requester, Change Approver, and E-mail Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it. Note: No notification is sent to the e-mail subscriber list for CM tickets scheduled as recurring.

> **Note:** You may manually complete the CM ticket before the
> scheduled end time by clicking the Complete button.

Completing Change Management Tickets

CM tickets can be completed either automatically by the system or manually by
selecting **COMPLETE**. A CM ticket must be in the WIP status before you can
Complete the work period for a CM ticket. Once a CM ticket is being worked on, you
may click **COMPLETE** to complete the work for a CM ticket ahead of the scheduled
end time; otherwise the system automatically completes the implementation once the
End Date scheduled for a CM ticket is reached.

> **Note:** You must have the appropriate privileges to complete a CM
> ticket.

To manually complete a CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Portal appears.

2. On the Change Management page, find the CM ticket for which you want to
   complete implementation (look for CM tickets with the status set to WIP); then
   click Update. The Update CM Ticket page displays.

3. On the Update CM Ticket page, select the Complete action button.

   When you click Complete, the Change Management service application initiates
   the Complete work flow. If you receive any errors, make the necessary corrections,
   and then complete the CM ticket. After successfully completing the CM ticket, its
   status will change to Completed.

   > **Note:** For recurring CM tickets, Oracle Advanced Support Platform
   > displays a message, informing you that completing this CM ticket
   > completes the CM ticket permanently.

4. The action of completing a CM ticket causes the system to:

   - Check that all mandatory fields are populated with valid data.

   - Save the CM ticket in the database.

   - Update the CM ticket Worklog with the name of the user who completed the
     CM ticket.

   - Advance the CM ticket to the Complete status.

   - Notify the following: Change Implementer(s), Change Owner, Change
     Requester, Change Approver, and E-mail Subscriber List. The e-mail
     notification has an embedded hyperlink to the CM ticket making it easy for
     the recipients to access it.

Closing a Change Management Ticket

CM Tickets can be closed either automatically by the system or manually by selecting
the Close action button. A CM ticket must be in the Completed status before it can be

Closed. In addition, if a post implementation review is required, you must wait to close the CM ticket until after the post implementation review is completed. Once a CM ticket is completed, you may click the Close button to close the CM ticket; otherwise the system automatically closes the CM ticket once its timestamp reaches 24 hours in the Completed status. Wherever possible, you should always close a CM ticket when work is complete.

> **Note:** You must have the appropriate privileges to close a CM ticket.

To manually close a CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click the **Advanced Monitoring** tab.

   The Advanced Monitoring page appears.

3. From the Change menu, select **Change**.

   The Change Management page appears.

4. Locate the CM ticket you want to close (look for CM tickets with the status set to Completed), then click **Update**.

   The Update CM Ticket page appears.

5. Click **CLOSE TICKET**.

   When you click **CLOSE TICKET**, the Change Management application starts the Close work flow. If you receive any errors, make necessary corrections, and then close the CM ticket. After successfully closing the CM ticket, its status will change to CLOSED.

6. The action of closing a CM ticket causes the Oracle Advanced Support Platform to:

   - Check that all mandatory fields are populated with valid data.

   - Save the CM ticket in the database.

   - Update the CM ticket Worklog with the name of the user who closed the CM ticket.

   - Advance the CM ticket to the Closed status.

   > **Note:** You cannot reopen or edit a Closed CM ticket.

Cancelling Change Management Ticket

You can cancel a CM ticket anytime before its status is set to Completed. You cancel a CM ticket by selecting the CM ticket you want to cancel and clicking the Cancel action button. You must have the appropriate privileges to cancel a CM ticket.

> **Note:** You can cancel a recurring CM ticket anytime before its first WIP iteration or during the Schedule status of each iterative period.

To cancel a CM ticket:

1. Log in to Oracle Advanced Support Platform.

The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Change** tab.

   The Change Management page appears.

4. Locate the CM ticket you want to cancel (look for CM tickets with the status set to Draft, Pending Approval, Pending Scheduling, Scheduled, or WIP); then click **Update**. The Update CM Ticket page displays.

5. On the Update CM Ticket page, select **CANCEL**.

6. In the Cancel Change Ticket window, provide a reason for canceling the CM ticket, then click **CANCEL REQUEST** to cancel the CM ticket.

   The Change Management service application starts the Cancel work flow. If you receive any errors, make necessary corrections, and then cancel the CM ticket. After successfully canceling the CM ticket, its status will change to CANCELED.

7. The action of canceling a CM ticket causes Oracle Advanced Support Platform to:

   ■ Check that all mandatory fields are populated with valid data.

   ■ Save the CM ticket in the database.

   ■ Update the CM ticket Worklog with the reason for the canceled ticket and the name of the user who canceled the CM ticket.

   ■ Update the CM ticket status to Canceled.

   ■ Notify the following: Change Implementer(s), Change Owner, Change Requester, Change Approver, and E-mail Subscriber List. The e-mail notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.

8

Using Problem Management

This chapter describes problem management in Oracle Advanced Support Platform. It covers the following topics:

- About Problem Management
- Searching Problem Management Tickets
- Viewing Problem Management Tickets

> **Note:** If you cannot see the **Advanced Monitoring** tab when you log in to Oracle Advanced Support Platform, contact your Oracle Advanced Support Platform customer user administrator.

About Problem Management

Problem Management aims to resolve the root causes of incidents and thus to minimize the adverse impact of incidents and problems on business that are caused by errors within the IT infrastructure, and to prevent recurrence of incidents related to these errors. A problem is an unknown underlying cause of one or more incidents, and a known error is a problem that is successfully diagnosed and for which either a workaround or a permanent resolution has been identified.

The Problem Management process deals with the outcomes of Event, Incident, and Change Management. Its priority is to establish workarounds to minimize the impact of Incidents, and then to reduce the occurrence of the Incidents by systematically eliminating the causes. Problem Management feeds into Knowledge and Change Management with known errors and Requests for Change (RFC).

Searching Problem Management Tickets

Use this procedure to search for PM Tickets. The displayed results depend on your role within Oracle Advanced Support Platform.

To search for a PM Ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Problem** tab, select **Search PM Tickets**.

The Search PM Ticket page appears similar to Figure 8–1, depending on your privileges.

Figure 8–1   Search PM Ticket Page

4. From the Search PM Ticket page, you can use any of the following criteria to search for a PM Ticket:

Search Criteria	Description
Ticket ID	PM Ticket ID.
Summary	PM Ticket summary.
Priority	Priority of PM tickets
Classification	List of PM Ticket classifications
Related External ID	Reference ticket ID from an external ticketing system.
Related Incident ID	Related Incident ticket ID if applicable.
	Note: You must have appropriate privileges to view this option.
Date Type	From the Date Type list, select the type of date by which you want to search.
Time Frame	Select a predefined time period within to search.
Begin Time	Use the Calendar icon to select a start date to create a time period within which to search.
End Time	Use the Calendar icon to select an end date for the time period within which to search.
Geo	List of geos
Customer	List of customers for the selected geo
Owner	List of owners for the selected customer.
Implementer	Name of the implementer
Ticket Status	Select the status of the PM Ticket from the list or additionally select one of the following: ■ **All** to search for PM Tickets with all statuses. ■ **All Working** to search for PM Tickets with all statuses except Closed.

5. Click **SEARCH**.

The processing time for any search varies depending on the size of the data file being searched. To decrease processing time, narrow the search by using multiple search fields.

Oracle Advanced Support Platform displays the results in the Ticket Search Results table. You can choose to display 10, 25, 50, or 100 tickets per page. 10 tickets per page is the default

6. Re-sort the results by clicking the Ticket ID, Owner, Customer, or Creation Date columns.

Viewing Problem Management Tickets

To view a PM Ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Problem** tab.

   The Problem Management page appears.

   > **Note:** Beside **Refresh**, click the orange arrow to export the displayed list of PM Tickets to Microsoft Excel or CSV files.

4. Select a PM Ticket to view using any of the following methods:

   - The Problem Management page displays a list of PM Tickets. Click the ticket number or **View**.

   - Use the Search feature as described in "Searching Problem Management Tickets". From the Ticket Search Results area, click the ticket number or **View**.

   The View PM Ticket page appears with the selected PM Ticket information.

5. Click the Attachments tab at the top of the View PM Ticket page.

   The Attachments page appears.

6. Review the files displayed as required.

9

Using Summary Reporting

This chapter describes the summary reporting capabilities of Oracle Advanced
Support Platform. It covers the following topic areas:

- Report List
- Generating Availability Reports
- Generating External Reports
- Viewing Reports
- Creating Subscriptions
- Viewing Subscription Summaries
- Creating SLA Reports

> **Note:** If you cannot see the **Advanced Monitoring** tab when you log
> in to Oracle Advanced Support Platform, contact your Oracle
> Advanced Support Platform customer user administrator.

Report List

The Oracle Advanced Support Platform Report List displays all the reports athat have
been defined in the system for a specific customer. The name of the creator of each
report is also displayed. These reports contain user-defined data and formatting that
can help you focus on specific aspects of your organization's application and
infrastructure resource performance. Once saved, reports are available for viewing by
all system users with appropriate privileges.

You can mark or unmark favorite reports using the Name column. The Report Name
column provides a star rating, which is inactive (gray) by default. You can designate a
report a favorite by selecting the star. Selected stars are yellow, which indicates a
favorite report. In the Name column, you can also see all favorite reports using the
filter **Favorite**.

Figure 9–1   Reports Dashboard
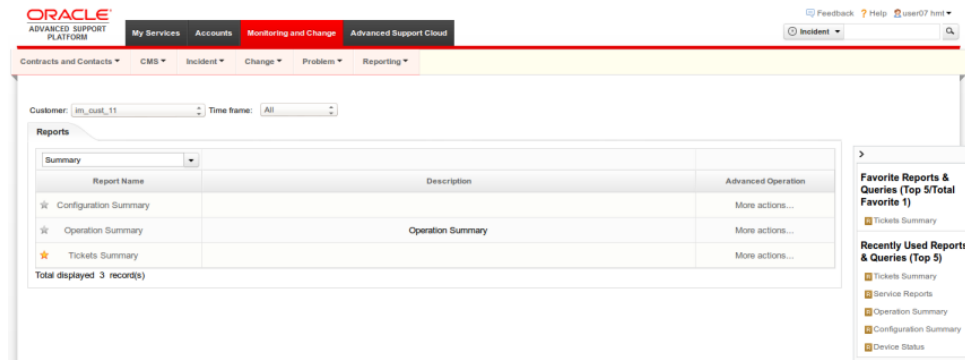
From the Report List dashboard, you can also select Advanced Operation to show more operations. You can generate, edit (if such privileges are granted), delete, and subscribe to different report types. In addition, the Reporting service enables creating reports based on queries that extract data from the Reporting database. You can create, view or delete queries that have been defined for a specific customer such as an availability summary, change ticket summary, incident ticket summary, or organization summary query.

You view reports and queries in any spreadsheet program capable of reading CSV format (Comma Separated Values) files as well as viewing reports online through Oracle Advanced Support Platform.

Generating Availability Reports

The Availability Reporting function collects and analyzes data from the event logs of monitored servers and then generates configurable reports that users can view and customize to suit the needs of their organization. Users can use these reports to identify the causes for planned and unplanned downtime and take preemptive actions to decrease downtime in the future.

Availability reports calculate the metrics of server availability and a standard report is configured to display the resulting data. Each configuration includes tables or graphs with information about the availability and reliability of servers, devices, and services in the monitored environment. Users can enter parameters, such as specific periods of time, to filter the data presented.

Availability reports provide the following advantages:

■ Determine whether monitored servers are meeting their availability and reliability objectives.

■ Filter reports to track trends by viewing information collected over a specific length of time, such as over a period of months or years.

- Filter reports to view information on a specific subset of monitored servers.

- Identify the best and worst performing computers for a particular area. For example, you can identify which servers suffer the most or least number of system failures.

- Identify problem areas, such as a particular application or operating system version that stops responding.

- Gather information about operating systems and applications.

To generate an Availability Report:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Reports** tab, select **(View) Availability Reports**.

   The Detailed Availability Reports page appears.

4. From the Probe list, select the probe that you want to report upon.

5. In the Start/End Time fields, specify the date and time over which you want the report data to cover.

6. From the Interval list, specify how often you want to create the report.

7. Click **GENERATE** to create the report using the parameters you specified in the steps above.

   Oracle Advanced Support Platform generates an availability report similar to Figure 9–2.

Figure 9–2   Example of an Availability Report
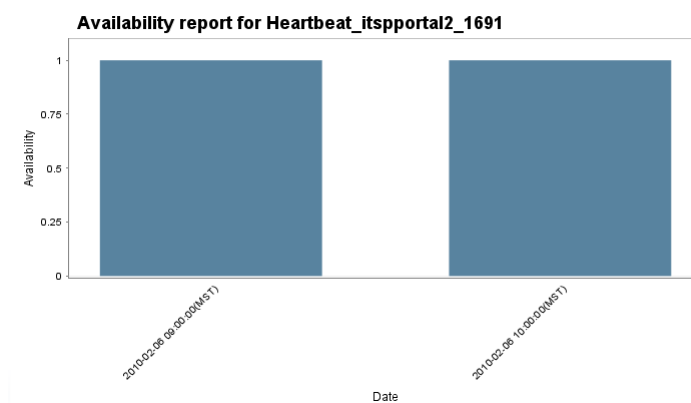
Generating External Reports

Use this procedure to make local reports available to your users. The External Reports page provides a local URL instance of the report.

To create an external report:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

    The Advanced Monitoring page appears.

3. From the **Reports** tab, select **(View) External Reports**.

    The External Report List page appears.

4. Click **Add External Report**.

    The Add External Report area appears on the page.

5. Complete the Add External Report area as required.

6. Click **SAVE**.

Viewing Reports

Use this procedure to view a report. A report can consist of query components from the Incident, Change, Configuration Management System (CMS), and Monitoring service applications. You can generate a report from the View Report page for your company within a specific data and time range.

To view a report:

1. Log in to Oracle Advanced Support Platform.

    The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

    The Advanced Monitoring page appears.

3. Click the **Reports** tab.

    The Reports page appears.

4. Locate the report you want to view, then click the Report Name.

    The View Report page appears.

5. For the relevant report, click **More actions...** in the Advanced Operation column.

    The Advanced Operation page appears.

6. You can select a timeframe or choose to generate a report within a particular date and time range:

    Select a timeframe as follows:

    ■   Current hour

    ■   Current day

    ■   Current week

    ■   Past 24 hours

    ■   Past 1 day

    To generate a report within a particular date and time range:

    a. In the Begin Time field, click the calendar icon; then select the begin date and time range. Click **Apply** to apply your selection to the Begin Time field.

    b. In the End Time field, click the calendar icon; then select the End date and time range. Click **Apply** to apply your selection to the End Time field.

Then click **EXECUTE REPORT** to generate the report for the selected timeframe or the specified date and time range.

The system generates the report for the customer organization and date/time window you selected and displays the data in the Report Results area.

7. Click **Download CSV** to download all report results or you can download only an individual result. You can export the results to any common spreadsheet program that supports comma-separated value (CSV) files.

Viewing Favorites

The Favorites area is displayed on the Report List page, the View Report page, and the View Query page. You can show or hide the Favorites area using the arrows on the top right of these pages.

Figure 9–3   Reports Dashboard Favorites
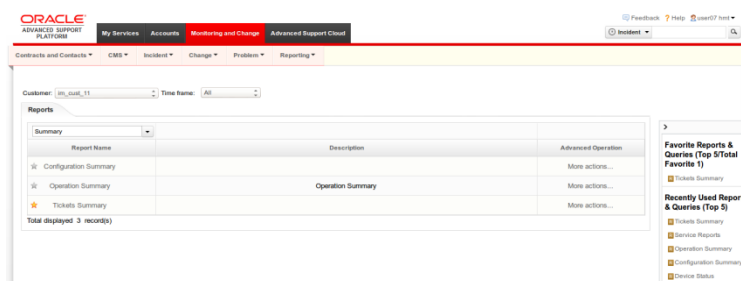
The upper part of the Favorites area displays the top 5 favorite reports or queries, ordered by frequency of use. Hold the cursor over the report or query to show the number of times it was used. Click the query or report link to view more information about it.

The lower part of the Favorites area displays the top 5 recently used reports or queries. Hold the cursor over the report or query to show the date and time it was last used. Click the query or report link to view more information about it.

To view favorite queries or reports:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. Click the **Reports** tab.

   The Reports page appears.

4. From the Report Name or Query Name list, select **Favorites**.

   The Report List page reappears, displaying all favorite reports or queries, as appropriate.

5. To view more details about a favorite report or query, click the report or query link in this list.

Creating Subscriptions

When you create a subscription, you instruct Oracle Advanced Support Platform to e-mail, on a periodic basis, certain types of user reports to recipients defined in a subscriber list.

You configure scheduled reports by defining which type of report to send, the frequency with which the report is sent, and to whom the report is sent. You can schedule reports to be sent to one or more recipients.

To create a report subscription:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Reports** tab, select **(Create) Subscription**.

   The Create Subscription page appears.

4. In the Subscription Title box, enter a name for the report subscription, for example, *Jim's daily update of CMS inventory*.

5. From the Report/Query list, select the report or query you want to schedule to be delivered to a subscriber list.

6. From the Date Period list, select the date period for the report:

   - Current hour

   - Past 48 hours

7. From the Schedule Type list, select a schedule for the report. You can choose from any of the following options (you must choose at least one):

   - To send a report on a daily basis, select Daily report (you must select the time of day at which the report should be sent).

   - To send a report on a weekly basis, select Weekly (you must select the day of the week on which the report should be sent).

   - To send a report on a monthly basis, select Monthly (you must select the day of the month on which the report should be sent), Quarterly, or Yearly.

8. From the Deliver At list (filtered from your Schedule Type selection), select when the report should be sent as follows:

   - Time of day

   - Day of the week

- Day of the month

- Day of the quarter

- Day of the year

9. From the Time Zone list, select the time zone region associated with sending the report.

10. From the Date Format list, select the date format associated with sending the report.

11. From the Time Format list, select the time format associated with sending the report.

12. From the E-mail Format list, select the format in which to send the report.

13. Select **Archive Report** if you want to view reports from the archive from the Subscription Summary page.

> **Note:** You must have the relevant privileges to view archived reports.

The Max Archives box appears.

14. Enter the maximum number of reports that you want to archive. 10 is the default maximum.

15. From the Subscribers area, select the report recipients by selecting the appropriate subscriber e-mail list.

16. Click **SUBSCRIBE**.

Oracle Advanced Support Platform creates the subscription and schedules the report to be delivered to the selected subscribers.

Viewing Subscription Summaries

Use this procedure to view a summary overview of all subscriptions belonging to your company. You can apply filters to display certain subscription information by subscriber list and report list.

From the Subscription Summary page, you can also choose to edit or delete a subscription.

> **Note:** When editing a subscription, you cannot change the report type.

To view the Subscription summary:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Reports** tab, select **(View) Subscriptions**.

   The Create Subscription page appears.

4. In the Filter section, from the Subscriber and Report list, select filter information as appropriate, then click **FILTER**.

   The filter results appear in the Summary section.

View Reports from the Archive

If you selected the Archive Report option when you created your subscription, then you can view the reports from the Subscription Summary page.

To view archived reports:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Reports** tab, select **(View) Subscription**.

   The View Subscription page appears.

4. From the Subscription Summary page, locate the subscription that you want to edit.

5. From the View Archives column, click **View**.

   The Archives page appears.

6. Locate the required report, then click **View**.

   The *Subscription_Name* page appears.

Creating SLA Reports

Oracle Advanced Support Platform enables you to generate reports about service level agreements (SLAs), if you have been granted the appropriate privileges.

To create an SLA report:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform page appears.

2. Click **Advanced Monitoring**.

   The Advanced Monitoring page appears.

3. From the **Reports** menu, select **(Create) Report**.

   The Create Report page appears.

4. From the Report Type list, select **SLA**.

5. In the Report Title box, enter a name for the SLA report.

6. From the Access Type list, select the type of access to the report.

7. From the Customer list, select the customer organization associated with the report.

8. In the Description box, optionally provide a description of the report.

9. From the Queries list, select one or more queries you want to use to build the report; then click **Add** to move the query to the Selected Queries window.

10. To add report parameters that the user must complete when running the report:

   a. Under **Report Parameters**, click **Add**.

      The Add Parameter window appears.

   b. Select the parameter type, enter the name, and title to be displayed to the user.

   c. Click **ADD**.

11. To edit a selected query:

   a. From the Selected Queries window, select a query, then click **Set parameters.** The parameter settings for the selected query appear under **Query Parameters**.

   b. In the Title box, change the name of the query if required.

   c. Under **Group Settings**, from the Can group fields list, select the fields that you want to group, then click **Add**.

   d. Under **Fields Settings**, you can do the following:

      – Select **Hide this field** if you want to omit a specific field from the report.

      – From the Subtotal function list, select the aggregation value to display as a subtotal within the report for the specific field, such as number of rows (COUNT ROW) or number of unique values within a column (COUNT UNIQUE VALUE.)

      – From the Filters list, select an operator to filter the results, such as **between** to display results between two defined points.

12. Under **Render Settings**, select how you want to represent the report.

The system uses the queries you selected to create the report and display a tabular or graphical representation of the query data retrieved from the Reporting database.

A

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