Oracle® Advanced Support Platform User's Guide

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Oracle Advanced Support Platform User's Guide

Part No: E35819-06

Référence: E35819-06

Accès aux services de support Oracle

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Contents

Oracle Advanced Support Platform User's Guide

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

About Oracle Advanced Support Platform

Oracle Advanced Support Platform forms the interface between you and Oracle, enabling you to use a single point of access for information about your Oracle processes and services using a Web browser. Oracle Advanced Support Platform is secure, easy to use, and provides access to Information Technology Infrastructure Library (ITIL)-based service application tools and best-practice workflows. Oracle Advanced Support Platform enables you to monitor and manage your infrastructure elements and drive competitive advantage to your core business.

Oracle Advanced Support Platform capabilities include:

- Easy navigation and reporting functionality
- A customer-generated on-demand reporting engine
- 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.

Logging in to Oracle Advanced Support Platform

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

Note - Before logging in to the Oracle Advanced Support Platform home page, ensure your browser is supported. See "Supported Internet Browsers" on page 15.

Tip - If you cannot log in to Oracle Advanced Support Platform or have not received an email notification, contact your IT service management (ITSM.)

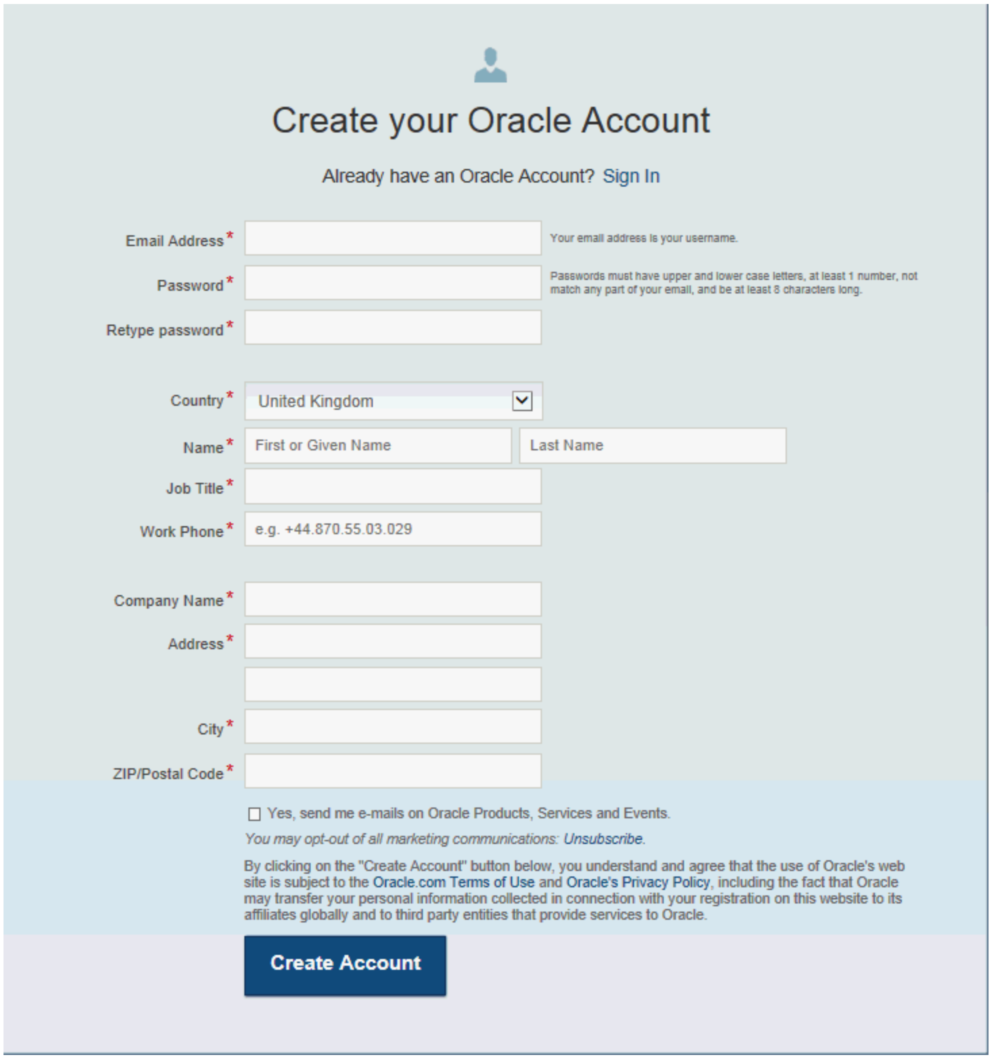
To log in to Oracle Advanced Support Platform:

1. Open the following Web page:

   `https://advancedsupport.oracle.com`

   The Oracle Advanced Support Platform login page appears.
2. Sign in using your Oracle Single Sign-On credentials.
   - In the **Username** field, enter your Oracle Single Sign-On (SSO) user name.
   - In the **Password** field, enter the password associated with your Oracle Single Sign-On (SSO) user name.
   - Click **Sign In**.
   - (Optional) If you don't have an Oracle SSO, click **Create Account**.

     The Create Your Own Oracle Account page appears. Complete the required fields as outlined in the section on registering the customer user and click **Create Account** to submit.



Supported Internet Browsers

Oracle Advanced Support Platform supports the following internet browsers:

- Mozilla Firefox and Mozilla Firefox ESR (current version; the version prior to the current release)
- Google Chrome (current version; the version prior to the current release)
- Microsoft Edge
- Safari (on macOS)

Note - Ensure that your browser supports Transport Layer Security (TLS) 1.2 or higher.

About the Oracle Advanced Support Platform User Interface

This section briefly describes the Oracle Advanced Support Platform user interface (UI) and provides an overview of the main UI components.

The Oracle Advanced Support Platform UI is made up of a number of principal elements that enable you to optimally manage your services and to perform tasks, for example:

- Create users and assign passwords and roles to them
- Generate an incident, change request, or report subscription
- Use the extended search facility to find items of interest
- Generate and review reports

The UI enables a single entry point for all users and offers a unified UI layout that is very intuitive and makes it is easier to find your content by gaining quicker access to your commonly used functions, as outlined in the following sections.

The Oracle Advanced Support Platform UI consists of the following elements:

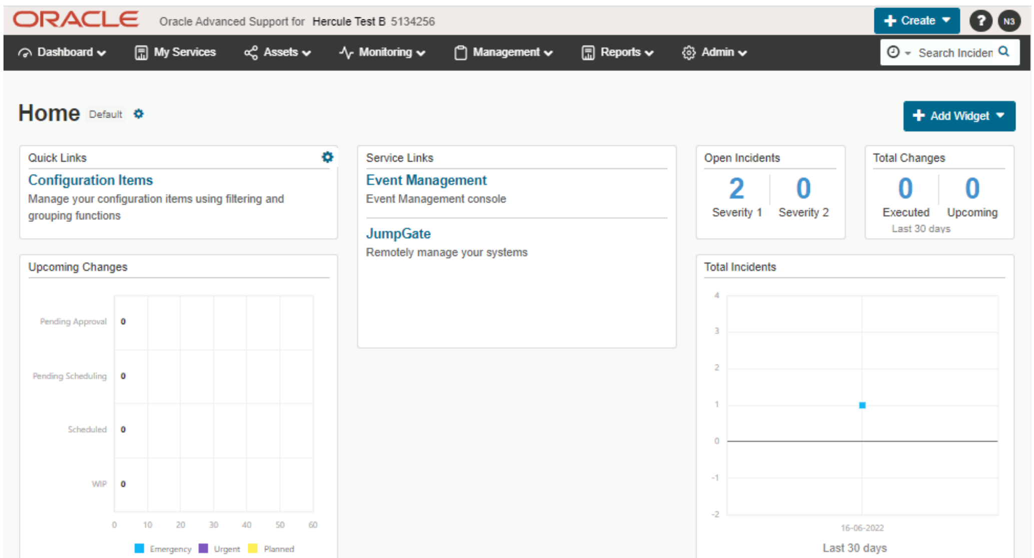
- Home page. See "About the Home Page" on page 16.
- Top-Level Menu. See "About the Top-Level Menu" on page 17.

About the Home Page

The default home page displays a dashboard with links to various features, functions and Oracle services.

Note - The links and services displayed vary by customer.

FIGURE 1 Oracle Advanced Support Platform: Home Page



About the Top-Level Menu

The top-level menu enables customers to monitor and manage their services and processes.

FIGURE 2 Oracle Advanced Support Platform User Interface: Top-Level Menu

The Oracle Advanced Support Platform top-level menu comprises the following sub-menus:

- Assets. See "About the Assets Menu" on page 18.
- Monitoring. See "About the Monitoring Menu" on page 18.
- Management. See "About the Management Menu" on page 19.

- Reports. See "About the Reports Menu" on page 20.
- Admin. See "About the Admin Menu" on page 20.

The Oracle Advanced Support Platform top-level menu also features:

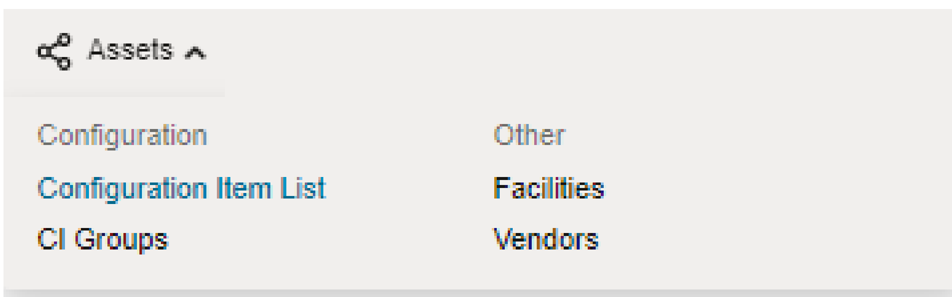
- A create list to create incidents, change requests, or report subscriptions. See "About the Create List" on page 21.
- Enhanced search functionality. See "About Advanced Search" on page 22.
- A revised user profile. See "About the User Profile" on page 23.
- Updated online help. See "About Online Help" on page 24.

About the Assets Menu

You use the Assets menu to view and manage Configuration Items (CI's) and CI groups.

You also use the Assets menu to review configurable targets, for example, facilities and vendors.

FIGURE 3 User Interface: Assets Menu

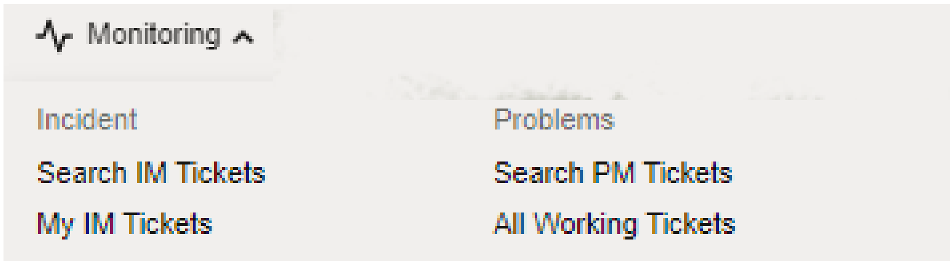


For more information on CI's and CI groups, see "Using the Configuration Management System" on page 44.

About the Monitoring Menu

You use the Monitoring menu to review incident management and problem management.

FIGURE 4 User Interface: Monitoring Menu



Note - This menu is visible only to customers with Oracle Monitoring Services.

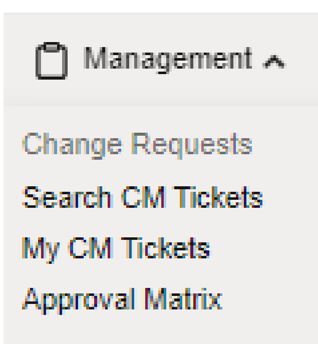
For more information on incident management, see "Using Incident Management" on page 53.

For more information on problem management, see "Using Problem Management" on page 86.

About the Management Menu

You use the Management menu to review change management capabilities.

FIGURE 5 User Interface: Management Menu



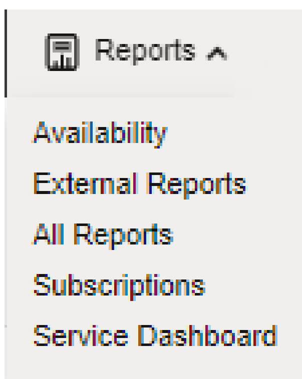
Note - This menu is visible only to customers with Oracle Management Services.

For more information on change management, see "Using Change Management " on page 59.

About the Reports Menu

You use the Reports menu to review summary reporting capabilities. 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.

FIGURE 6 User Interface: Reports Menu



For more information on generating reports, see "Using Reporting" on page 89.

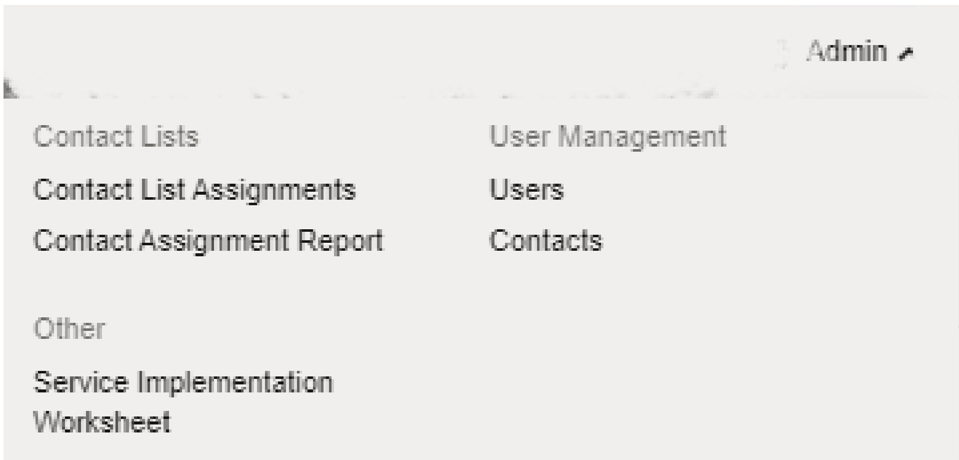
About the Admin Menu

You use the Admin menu to manage contact list assignments used by specific processes (for example, incident management and customer management) to send notifications, task messages for approval, or informational messages to designated contacts.

You also use the Admin menu to review the Service Implementation Worksheet (SIW) overview page that lists all implementation requests.

Customer user administrators can use the Admin menu to perform user management tasks.

FIGURE 7 User Interface: Admin Menu



For more information on managing contact list assignments, see "Managing Contact List Assignments" on page 39.

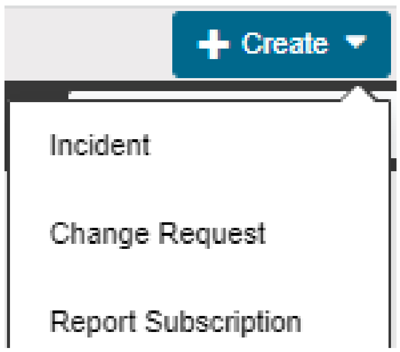
For more information on reviewing the SIW implementation requests, see "Managing Service Implementation Requests" on page 42.

For more information on user and contact management, see "Managing Users" on page 25.

About the Create List

You use the create list to perform one-click creation of incidents, change requests, or report subscriptions.

FIGURE 8 User Interface: Create List

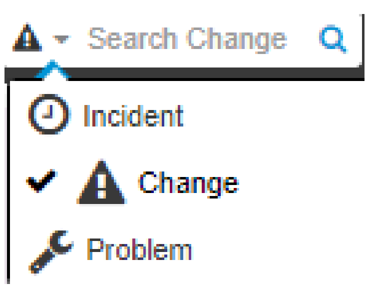


- For more information on creating incidents, see "Creating Incident Tickets" on page 57.
- For more information on creating change requests, see "Creating Change Management Tickets" on page 61.
- For more information on creating report subscriptions, see "Creating Subscriptions" on page 93.

About Advanced Search

You can access the Incident and change ticket search at the top of the user interface as shown.

FIGURE 9 User Interface: Search



You can also now limit your search to one of the following categories: incidents, problems, or change requests. Select the down arrow and click the required category. Next, enter the search string and click the search icon. The relevant entry is displayed.

If the search is unsuccessful, for example, finding a particular incident, you are can opt to go to the Incident Management (IM) landing page or revert to the IM search page.

For more information on searching incident tickets, see "Searching Incident Tickets" on page 54.

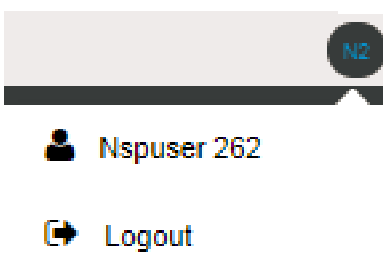
For more information on searching for problems, see "Searching Problem Management Tickets" on page 87.

For more information on searching change management tickets, see "Searching Change Management Tickets" on page 68.

About the User Profile

You can use the user profile button to update your user profile, set application preferences, or log out of the application.

FIGURE 10 User Interface: User Profile Button



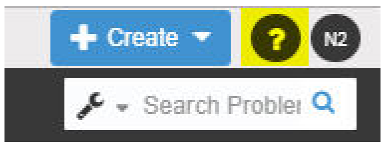
For more information on configuring your user profile, see "Customizing Your User Profile" on page 37.

To log out of the application, click **Logout**.

About Online Help

You can use the help button (highlighted below) to access *Oracle Advanced Support Platform User's Guide* (this document.)

FIGURE 11 User Interface: Online Help



About Other User Interface Elements

This section outlines some other elements of the UI. These include:

- "Reviewing and Filtering Information in Tables" on page 24.
- "Viewing Copyright Information" on page 25.

Reviewing and Filtering Information in Tables

You can filter, refine, and customize the presentation of results in Oracle Advanced Support Platform tables by performing the following actions:

Filter Results: Click any column name to sort data in that column. For example, click **Name** to sort alphabetically by name.

Search: Perform a search for data in the table. For example, in the table of Oracle Advanced Support Platform users, in the Search field on the menu bar, enter the user's name or email address. You can also use the wildcard symbol. Then click the Search icon. The Users page is refreshed, displaying the contact(s) matching the full or partial entry.

Re-order data: To reorder a list, use the arrows to alter the display.

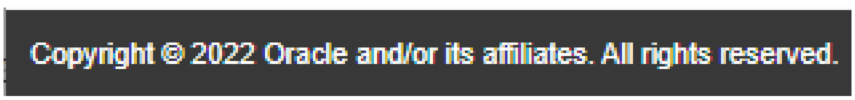
Customize the page: In the top right of the page or table, use the menu items under the wheel icon to perform the following actions:

- Click **Column Visibility** to deselect column names.
- Click **Print** to print the contents of the page.
- Click **Excel** to save the contents of the page in Microsoft Excel format.
- Click **CSV** to save the contents of the page in comma-separated variable format.

Viewing Copyright Information

The customer information section on the bottom of the screen provides links to the Oracle copyright notice.

FIGURE 12 User Interface: Copyright Information



Managing Users

This section describes how to manage customer users and customer user administrators (CUAs) in Oracle Advanced Support Platform. It consists of the following topics:

- "About Oracle Advanced Support Platform Users" on page 25.
- "About User Management" on page 27.

About Oracle Advanced Support Platform Users

Oracle Advanced Support Platform supports the following users:

- **Customer** user an individual in the customer organization who has been added to Oracle Advanced Support Platform.
- **Customer user administrator (CUA)**: a customer user with responsibility for granting privileges to other Oracle Advanced Support Platform users in their customer organization.

- **Oracle user**: An Oracle user with access to a customer, or to any of the customer resources, such as groups, contracts, or contract line items. An Oracle user can view or manage those resources according to the level of access granted.

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 as a customer user for your organization, you will receive an email 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 the list of users 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 Oracle Advanced Support Platform, thereby creating user accounts for those individuals. You can grant access privileges to your users using roles and privileges.

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

- View organizations to which you belong
- Manage users and contacts for your customer organization
- View and update your Oracle Advanced Support Platform profile information

About Oracle Users

An Oracle user is an Oracle employee who can access Oracle Advanced Support Platform. Oracle users can be granted access to view and manage customer organizations. For example, Oracle 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.

When requested, Oracle 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 User Management

The **Admin** menu enables you to manage your accounts through a series of links to different pages:

- **User Management**
  - **Users**: The Users page provides the ability to view, search for, (and in the case of CUAs) create and edit user information for your organization. Users have authorized access to Oracle Advanced Support Platform.
  - **Contacts**: The Contacts page displays all Oracle Advanced Support Platform contacts from your organization and from Oracle.

    In the case of CUAs, it enables you to create new customer user and notification contacts.

On the user management pages, you can also customize the way in which fields are displayed, or filter the users displayed by specifying 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.

Refer to the following topics:

- "Viewing Users" on page 27.
- "Adding Users" on page 29.
- "Registering the Customer User" on page 29.
- "Determining Whether a Customer User Has a Registered Username" on page 31.
- "Disabling Users" on page 34.

Viewing Users

The Users page enables you to view and maintain all of your organization's Oracle Advanced Support Platform users on one page, where a *user* has an account in Oracle Advanced Support Platform, enabling the user to access Oracle Advanced Support Platform.

To view users of Oracle Advanced Support Platform:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.
2. From the Admin menu, select **User Management**>**Users**.

   The Users page appears, displaying the following information for all authorized users in your organization:

TABLE 1 Oracle Advanced Support Platform User Information

Field	Description
Name	The user name for this Oracle Advanced Support Platform account.
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. ■ **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. **Note -** A customer user administrator can re-enable any user in their organization with a Disabled status.
Email	The user's email address, as registered in Oracle Advanced Support Platform.
Last login	The date on which the user last successfully logged into Oracle Advanced Support Platform..

(Optional) For a particular user, select from the icons in the **Actions** column to perform one of the following actions:

- Edit the user. See "Updating Users" on page 31.
- Enable (or disable) the user. See "Disabling Users" on page 34.

(Optional) You can filter, refine, and customize the presentation of results by performing the following actions:

- Filter results: Click any column name to sort the user displayed by that column. For example, click **Name** to sort alphabetically by name.
- Search contacts: In the **Search** field on the Users page, enter the contact's name or email address. You can also use the wildcard symbol, %. Then click **Return**. The Users page is refreshed, displaying the contact(s) matching the full or partial entry.
- Filter users: From the **Quick filters** section, select to view a list either of enabled users or disabled users.
- View detailed user information: Click a user name to view more detailed information about the user.

(Optional) You can also perform actions on multiple users at the same time by selecting the checkbox associated with one or more users and clicking **Bulk Actions**.

Adding Users

This section describes how you can add a new user to Oracle Advanced Support Platform.

Note - To add a user, you must be a customer user administrator (CUA) for your organization.

The individual to be added must not already be a contact for this customer organization in Oracle Advanced Support Platform. To determine whether the customer user already has a registered username - and therefore doesn't need to be added as a contact - refer to "Determining Whether a Customer User Has a Registered Username" on page 31 .

Registering the Customer User

You need to register the customer username in Oracle Advanced Support Platform before privileges can be assigned to the user and they can use Oracle Advanced Support Platform.

To register a new user of Oracle Advanced Support Platform:

1. Navigate to the Oracle Advanced Support Platform login page.
2. Click **Create Account**.

   The Create your Oracle Account page appears.
3. Complete the following information for the user:
   - **Email address**: Enter the user's email address.

     This *email address is the customer's user name* to be registered in Oracle Advanced Support Platform.
   - **Password**: Enter the password to be associated with your customer's Oracle Single Sign-On (SSO) user name.
   - **Re-type password**: Re-enter the password.
   - **Country**: Select the country of the user for this Oracle Advanced Support Platform account.
   - **Name**: Enter the given names of the user for this Oracle Advanced Support Platform account.
   - **Job title**: Enter the job title of the user for this Oracle Advanced Support Platform account.

- **Work Phone**: Enter the work telephone number associated with this user.
- **Company name**: Enter the name of the company associated with this user.
- **Address**: Enter the address of the company associated with this user.
- **City** : Enter the name of the city of the company associated with this user.
- **ZIP/Postal Code** Enter the ZIP code or postal code of the company associated with this user.

4. Click **Create Account**.

   The Users>Create User form appears.

5. Complete the following information for the user:
   - Type of user, which is one of the following:
     - **Normal**: Creates a customer user. This is the default.
     - **Administrator**: Creates a customer user administrator.
   - **Title**: Select the user's salutation, such as Mr., Mrs., or Ms.
   - **First name**: Enter the first name of the user.
   - **Last name**: Enter the last name of the user.
   - **Business title**: Enter the user's business title.
   - **Primary Email**: Enter the primary email address (principal user identifier) associated with this user.

     Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
   - **Secondary Email**: Enter the secondary email address associated with this user.

     Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
   - **Additional Email**: Enter an additional email address associated with this user.

     Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
   - **Primary Phone** : Enter the primary telephone number associated with this user.

     Select the telephone type:
     - Mobile/Cell (this is the default)
     - Office
     - Home
   - **Secondary Phone**: Enter the secondary telephone number associated with this user.

     Select the telephone type:
     - Mobile/Cell (this is the default)
     - Office
     - Home

- **Additional Phone**: Enter the additional telephone number associated with this user.

  Select the telephone type:

  - Mobile/Cell (this is the default)
  - Office
  - Home
- **Date format**: Select the format to be used when displaying dates for this user.
- **Time format**: Enter the format to be used when displaying times for this user.
- **Time zone**: Select the time zone in which the user works.
- **Preferred language**: Select the user’s preferred language.

6. Click **Create** to register the user, or click **Cancel** to quit.

   (Optional) Click **Users List** to display the Users page, showing the new user in the user table.

Determining Whether a Customer User Has a Registered Username

Service providers that wish to create Oracle Advanced Support Platform users must first ensure that the individual is not already a contact for the customer organization in Oracle Advanced Support Platform.

To determine whether a customer user already has a registered Oracle Advanced Support Platform username, and therefore doesn’t need to be added as a contact:

1. Open a Web browser and navigate to https://myprofile.oracle.com/EndUser/faces/profile/createUser.jspx?tid=minimal. See “Logging in to Oracle Advanced Support Platform” on page 14.
2. In the Email field, enter the customer username (email address.)

   If no message is displayed, continue with Oracle account creation.

   If the following message is displayed, “*Username already exists. Please log in or enter another username*”, then the customer username has been registered.

Updating Users

This section describes how you can update an existing user of Oracle Advanced Support Platform.

Note - To update a user, you must be a customer user administrator (CUA) for your organization.

The individual must be a contact or user for this customer organization in Oracle Advanced Support Platform.

To update an existing Oracle Advanced Support Platform user:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform login page appears.
2. From the **Admin** menu, select **User Management**>**Users**.

   The Users page appears, displaying information for all authorized users in your organization.

   See Table 2, "Oracle Advanced Support Platform Contact Information," on page 35.
3. Select the user that you want to update, and then select the **Edit User** icon in the Actions column.

   The Users> User Details page appears.
4. Click **Edit**.
5. Edit the following information as required:
   - Status, where:
     - **Enabled**: 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.
     - **Disabled**: an Oracle Advanced Support Platform user account has been deactivated.

       Users with this user status cannot log in to Oracle Advanced Support Platform.

     Note - A customer user administrator can re-enable any user in their organization with a Disabled status.

   - Type of user:
     - **Administrator**: Creates a customer user administrator.

     Note - If the user requires a custom role, it must be created and/or assigned after the user has been created.

   - **Title**: Select the user's salutation, such as Mr., Mrs., or Ms.
   - **First name**: Enter the first name of the user.

- **Last name**: Enter the last name of the user.
- **Business title**: Enter the user’s business title.
- **Primary Email (User ID)**: Enter the primary email address (and principal identifier) associated with this user.

  Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
- **Secondary Email**: Enter the secondary email address associated with this user.

  Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
- **Additional Email**: Enter an additional email address associated with this user.

  Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
- **Primary Phone** : Enter the primary telephone number associated with this user.

  Select the telephone type:
  - Mobile/Cell (this is the default)
  - Office
  - Home
- **Secondary Phone**: Enter the secondary telephone number associated with this user.

  Select the telephone type:
  - Mobile/Cell (this is the default)
  - Office
  - Home
- **Additional Phone**: Enter the additional telephone number associated with this user.

  Select the telephone type:
  - Mobile/Cell (this is the default)
  - Office
  - Home
- **Date format**: Select the format to be used when displaying dates for this user.
- **Time format**: Enter the format to be used when displaying times for this user.
- **Language**: Select the user’s preferred language.
- **Time zone**: Select the time zone in which the user works.

6. Click **Save** to update the user (or click **Cancel** to quit without saving.)

   (Optional) Click **Users List** to display the Users page, showing the updated user details in the user table.

Disabling Users

This section describes how you can disable an existing user of Oracle Advanced Support Platform. By disabling a user, the Oracle Advanced Support Platform user account is deactivated and the user cannot log in to the application.

Note - To disable a user, you must be a customer user administrator (CUA) for your organization.

The individual must be a contact or user for this customer organization in Oracle Advanced Support Platform.

To disable an existing Oracle Advanced Support Platform user:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform login page appears.
2. From the **Admin** menu, select **User Management**>**Users**.

   The Users page appears, displaying information for all authorized users in your organization.

   See Table 2, "Oracle Advanced Support Platform Contact Information," on page 35.
3. Select the user that you want to update, and then select the **Disable User** icon in the Actions column.
4. When prompted, click **Yes** to confirm that you want to disable this contact.
5. Click **Save** to update the user (or click **Cancel** to quit without saving.)
6. (Optional) Click **Users List** to display the Users page, showing the updated user details in the user table.

Managing Contacts

Oracle Advanced Support Platform provides the ability to manage customer user and notification contacts. This section contains the following topics:

- "Viewing Contacts" on page 35.
- "Adding Contacts" on page 35.
- "Updating Contacts" on page 36.
- "Deleting Contacts" on page 37.
- "Customizing Your User Profile" on page 37.

Viewing Contacts

To view customer contacts:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform login page appears.
2. From the **Admin** menu, select **User Management**>**Contacts**.

   The Contacts page appears, displaying the following information for all authorized contacts in your organization:

TABLE 2 Oracle Advanced Support Platform Contact Information

Field	Description
Name	The Oracle Advanced Support Platform contact name.
Email	The contact's email address, as registered in Oracle Advanced Support Platform, for example, an email alias of interested parties.
Phone	The primary telephone number associated with this contact.

(Optional) Click a contact name to view more detailed information about the contact and to enable the contact to be updated.

Adding Contacts

To add a customer contact:

Note - To add a customer contact, you must be a customer user administrator (CUA) for your organization.

The individual must not already be a contact or user for this customer organization in Oracle Advanced Support Platform.

---

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform login page appears.
2. From the **Admin** menu, select **User Management**>**Contacts**.

   The Contacts page appears, displaying all authorized contacts in your organization.
3. Click **Create Contact**.

   The Contacts form appears.

4. Complete the following information for the contact:
   - **Contact First Name**: Enter the first name of the contact.
   - **Contact Last Name**: Enter the last name of the contact.
   - **Primary Email**: Enter the primary email address (principal user identifier) associated with this contact.
   - **Secondary Email**: Enter the secondary email address associated with this contact.
   - **Additional Email**: Enter the additional email address associated with this contact.
   - **Primary Phone**: Enter the primary telephone number associated with this contact.
   - **Secondary Phone**: Enter the secondary telephone number associated with this contact.
   - **Additional Phone**: Enter the additional telephone number associated with this contact.
5. Click **Create Contact** to register the contact, or click **Cancel** to quit.

   The Contacts page is displayed, showing the new contact in the table of customer users and notification contacts.

Updating Contacts

To update a customer contact:

Note - To update a customer contact, you must be a customer user administrator (CUA) for your organization.

---

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform login page appears.
2. From the **Admin** menu, select **User Management**>**Contacts**.

   The Contacts page appears, displaying all authorized contacts in your organization.
3. Click a contact name.

   The Contact Info form appears.
4. Update the following information as required:
   - **Contact First Name**: Enter the first name of the contact.
   - **Contact Last Name**: Enter the last name of the contact.
   - **Primary Email**: Enter the primary email address (principal user identifier) associated with this contact.
   - **Secondary Email**: Enter the secondary email address associated with this contact.
   - **Additional Email**: Enter the additional email address associated with this contact.
   - **Primary Phone**: Enter the primary telephone number associated with this contact.
   - **Secondary Phone**: Enter the secondary telephone number associated with this contact.

- **Additional Phone**: Enter the additional telephone number associated with this contact.

5. Click **Save** to update the contact (or click **Cancel** to quit without saving.)

   The Contacts page is displayed, showing information about the contact in the contact table..

Deleting Contacts

This section describes how you can delete an existing Oracle Advanced Support Platform contact.

Note - To delete a contact, you must be a customer user administrator (CUA) for your organization.

To delete an Oracle Advanced Support Platform contact:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform login page appears.
2. From the **Admin** menu, select **User Management**>**Contacts**.

   The Contacts page appears, displaying all authorized contacts in your organization.
3. Select the contact that you want to delete, and then select the **Delete Contact** icon in the Actions column.
4. When prompted, click **Yes** to confirm that you want to delete this contact.

Customizing Your User Profile

You can use Oracle Advanced Support Platform to update your user profile, including contact information and preferences.

To update your user profile:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform login page appears.
2. In the top-right of the user interface, click the user icon.

   The current user profile appears, as well as an option to log out of the application.
3. Click the user profile link.

   The User Profile page appears.
4. Click **Edit**.

5. Modify the following fields as required:
   - **Title**: Select the user's salutation, such as Mr., Mrs., or Ms.
   - **First name**: Enter the first name of the user.
   - **Last name**: Enter the last name of the user.
   - **Business title**: Enter the user's business title.
   - **Primary Email**: Enter the primary email address (principal user identifier) associated with this user.

     Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
   - **Secondary Email**: Enter the secondary email address associated with this user.

     Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
   - **Additional Email**: Enter an additional email address associated with this user.

     Select the **Send notifications to this email** checkbox to send notifications relating to this user to this email address.
   - **Primary Phone** : Enter the primary telephone number associated with this user.

     Select the telephone type:
     - Mobile/Cell (this is the default)
     - Office
     - Home
   - **Secondary Phone**: Enter the secondary telephone number associated with this user.

     Select the telephone type:
     - Mobile/Cell (this is the default)
     - Office
     - Home
   - **Additional Phone**: Enter the additional telephone number associated with this user.

     Select the telephone type:
     - Mobile/Cell (this is the default)
     - Office
     - Home
   - **Date format**: Select the format to be used when displaying dates for this user.
   - **Time format**: Enter the format to be used when displaying times for this user.
   - **Language**: Select the user's preferred language.
   - **Time zone**: Select the time zone in which the user works.
6. Click **Save** to update the user profile.

   The updated user profile appears, displaying the new information.

Managing Contact List Assignments

This section describes how to manage contact list assignments, and generate contact assignment reports in Oracle Advanced Support Platform. It consists of the following topics:

- "Creating Contact List Assignments" on page 40.
- "Viewing Contact Assignments" on page 41

Oracle Advanced Support Platform supports two types of contact list:

- *System Defined Lists*: Built-in contact lists used internally by Oracle Advanced Support Platform, including the email subscriber list for incident management. The System Defined Lists and the justification for sending an email to its constituent members are as follows:
  - **CAB Member**: Because they are members of the Change Approval Board (CAB)
  - **CM email Subscriber**: For each action on a CM ticket
  - **Escalation**: When an Incident ticket is escalated
  - **IM email 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**: To satisfy the service delivery SLA notification commitment
  - **PM email 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
- *User Defined Lists*: Customized contact lists that are specific to 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 Admin menu, select **Contact List Assignments**.

   The Contracts and Contacts page appears, displaying all authorized contacts in your organization.

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. See "Creating Contact List Assignments" on page 40.
   - View a contact list assignment. See "Viewing Contact Assignments" on page 41.

Creating Contact List Assignments

This section describes how to create a contact list assignment in Oracle Advanced Support Platform.

Note - Only users with appropriate permissions are allowed to view and manage contact list assignments for their customer organizations.

To create a contact list assignment for a particular customer organization:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.
2. From the **Admin** menu, select **Contact List Assignments**.

   The Contracts and Contacts page appears.
3. From the Contact List Type list, select the type of contact list:
   - *System Defined Lists*: Built-in contact lists used internally by Oracle Advanced Support Platform
   - *User Defined Lists*: Customized contact lists that are specific to your service delivery organization
4. From the Contact List list, select a contact list.
5. To create a contact for the customer organization:

   a. Select the **Customer** tab, and then click **Add Contact for Customer**.

      The Customer area expands.

   b. From the **Contact** list, select the contact to be assigned.

   c. If ranking is allowed for the specified contact list, select the appropriate value from the **Rank** list. The ranking value ranges from 1 to 10.

   d. (Optional) Select the **Verbal Notification** check box if you want to inform the contact about the creation of the contact for the customer organization.

   e. Click **Add Member**.

      The new contact appears in the list of contacts.

6. To create a contact for a specific configuration item:

    a. Select the **Configuration Item** tab, and then click **Add Contact for Configuration Item**.

       The Configuration Item area expands.

    b. From the **Contact** list, select the contact to be assigned.

    c. If ranking is allowed for the specified contact list, select the appropriate value from the **Rank** list. The ranking value ranges from 1 to 10.

    d. (Optional) Select the **Verbal Notification** check field if you want to inform the contact about the creation of the contact for a specific configuration item.

    e. Click **Add Configuration Item**. The CI Picker dialog field appears, providing the following views:

       - **Group View**: Select a CI group from the Static Groups or Smart Groups list.
       - **CI View**: Select the required CI's using the filter lists

    f. Click **Select**.

       The new CI appears in the Configuration Item area.

    g. Click **Add Member**.

       The new contact appears in the list of contacts.

7. To create a contact for a CI group:

    a. Select the **CI Group** tab, and then click **Add Contact for CI Group**.

       The CI Group area expands.

    b. From the **Contact** list, select the contact to be assigned.

    c. From the **CI Group** list, select the required CI group.

    d. If ranking is allowed for the specified contact list, select the appropriate value from the **Rank** list. The ranking value ranges from 1 to 10.

    e. (Optional) Select the **Verbal Notification** check field if you want to inform the contact about the creation of the contact for a CI group.

    f. Click **Add Member**.

       The new contact appears in the list of contacts.

Viewing Contact Assignments

This section describes how to view contact assignments in Oracle Advanced Support Platform.

Note - Only users with appropriate permissions are allowed to view and manage contact list assignments for their customer organizations.

To view contact list assignments:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.
2. From the Admin menu, select **Contact List Assignments**.

   The Contracts and Contacts page appears, displaying all authorized contacts in your organization.
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.

Managing Service Implementation Requests

This section describes how to manage Service Implementation Requests (SIW) in Oracle Advanced Monitoring and Resolution. It consists of the following topics:

- "About Service Implementation Worksheets" on page 42.
- "About the Service Implementation Worksheet Customer Invitation" on page 43.
- "Reviewing Service Implementation Worksheets" on page 43.

About Service Implementation Worksheets

The Service Implementation Worksheet (SIW) is a key part of planning and executing an efficient and successful initialization and implementation of Oracle services. This section outlines:

- The required data elements and why they are important
- Where to source the required data elements for the SIW
- What constitutes a fully-qualified SIW that enables Oracle to begin the implementation process.

Note - You cannot be selected as a user associated to an SIW until your customer account is enabled. In order to access an SIW, customers require an Oracle Single Sign On account (see https://profile.oracle.com/myprofile/account/create-account.jspx to create an account). After customers create the SSO, Oracle grants that user access to Oracle Advanced Support Platform. The customer can then activate the Oracle Advanced Support Platform account by logging in and accessing SIW.

About the Service Implementation Worksheet Customer Invitation

The customer must be invited by an Oracle representative to complete an SIW. The Oracle representative creates a customer invitation form, specifying the customer name and contact email address, and sends the invitation to the customer contact. Once the customer invitation is completed and submitted, the customer receives an email containing a link to the Service Implementation Worksheet Overview screen.

Reviewing Service Implementation Worksheets

Customers can use Oracle Advanced Support Platform to review all of their implementation requests.

Note - Only users with appropriate permissions are allowed to view and manage implementation requests for their customer organizations.

To view implementation requests (SIWs):

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform Home page appears.
2. From the Admin menu, select **Service Implementation Worksheet**.

   The Service Implementation Worksheet Overview page appears, displaying all implementation requests in your organization.
3. From the list of implementation requests, select the required SIW.
4. You can filter implementation requests by status:
   - *Complete*
   - *In progress*
   - *Canceled*
5. Review SIWs by name, template, customer associated to the implementation request, applied service, creation date, date of last update.
6. (Optional) Edit the SIW by clicking the **Edit** icon in the Actions column. Only SIWs with the *In progress* status can be edited.

   Note - Only users with appropriate permissions are allowed to edit implementation requests for their customer organizations.

   ---

7. (Optional) Cancel the SIW by clicking the **Cancel** icon in the Actions column. Only SIWs with the *In progress* status can be edited.

Note - Only users with appropriate permissions are allowed to cancel implementation requests for their customer organizations.

Tip - For more information on managing SIWs, refer to the Oracle Advanced Support Gateway Documentation Documentation Library.

Using the Configuration Management System

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

- "About the Configuration Management System" on page 44.
- "About the Configuration Item List Data Table" on page 46.
- "Searching for Configuration Items" on page 50..
- "Managing Configuration Item Facilities" on page 52.

About the 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 (CI's). 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 of the Configuration Management System

The key features and benefits of the CMS include the following:

- Identifies customer assets: You can identify physical and logical assets. These assets are identified within the CMS as Configuration Items (CI's). CI's can be further combined into CI Groups for aggregated identification.

The CMS provides a user interface that enables both customer users and Oracle users to view, add, and modify the CI’s in the data model;

- Manages customer assets: You can search for CI's based on multi-criteria conditions, save search conditions, retrieve Level of Service (LOS) information for CI's associated with a detected event, and view customer level statistics associated with a CI.
- Provides greater efficiencies and better customer system visibility: CMS service modeling provides a framework that represents the relationships between CI’s. The relationship data are captured from Oracle Enterprise Manager (OEM) and are made available in CMS in a graphical format and - via APIs - to other models for enhancement functionalities (for example, event flood, performance reporting.) Furthermore, CMS data visualization enables the representation of multiple level parent/child CI relationships, which allows users to model and map complex CI environments.
- Enables export to CSV or Microsoft Excel format: You can export lists of configuration items (along with their properties) to CSV and Excel formats 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 CI Browser viewing page provides multiple customizable filtering options, as well as showing configuration item groups and a list of filtered results.
- Uses the Oracle Enterprise Manager (OEM) data model which is flexible, extensible, and compatible with OEM.
- Provides the required level of information: The CMS dashboard shows the hierarchy of configuration items, and you can drill down to the required level of information.
- Provides a user interface that enables both customer users and Oracle users to view, add, and modify the CI’s in the data model;
- Synchronizes data, such as CI information, between Oracle Advanced Support Platform and the distributed Oracle Advanced Support Gateways (hereafter referred to as gateways.) In the case of CI information this eliminates the requirement for users to manually import CI data from managed customer environments.

Configuration Management System Dependencies

You can access CMS through Oracle Advanced Support Platform and use it to manage CI's and their relationships. CMS feeds this CI and CI Group information to support the operations of Incident Management, Change Management, and the Event Dispatcher. The following sections provide further information:

- **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 CI's.

  - Assisting with identification of incidents of similar CI type.
- **CMS and Change Management**: CMS assists Change Management by:
  - Enabling you to choose CI's 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 CI's.

About the Configuration Item List Data Table

You use the Configuration Item List data table to view and administer your CI's.

This section describes the following tasks:

- Viewing CI Details
- Viewing CI Relationships
- Viewing Tickets and Events
- Viewing IP Addresses
- Viewing the Properties of a CI
- Viewing Services and Service Options
- Viewing Vendor Support Contracts
- Viewing CI Groups
- Viewing Protocol Services
- Viewing CI Attachments
- Viewing CI Credentials

Overview of the Configuration Item List Data Table

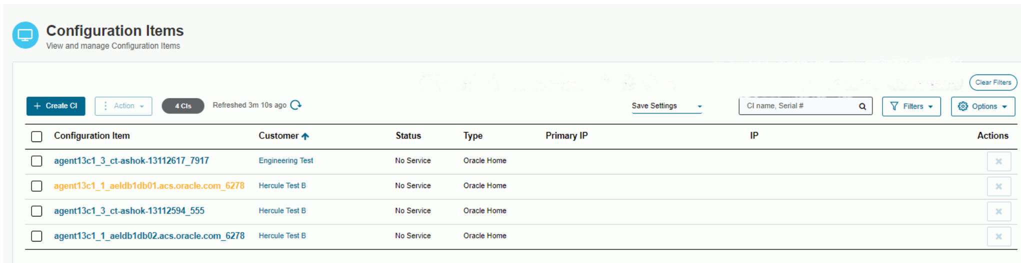
This section provides a description of the Configuration Item List data table controls and features that enable Oracle Advanced Support Platform users to access and manage their Configuration Items (CI's).

The scope of actions available to you in the Configuration Item List data table depend on your organization:

- Customer users can access their own CI's only. Customer users are allowed to search and view detailed information on their own CI's only.
- Oracle users can access CI's that belong to their customers and can manage CI's they are authorized to access.

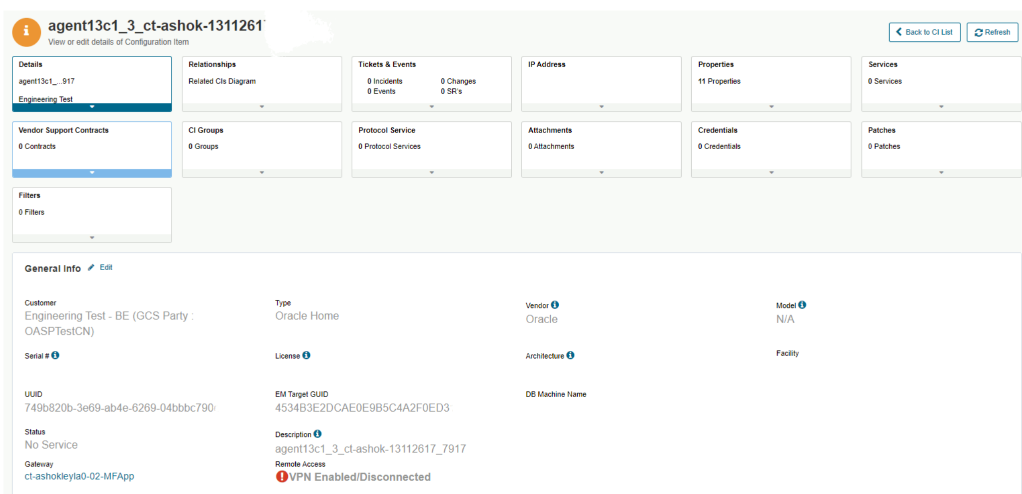
The following screenshot provides an example of the Configuration Item List data table.

FIGURE 13 Configuration Item List Data Table



Viewing Configuration Item Parameters

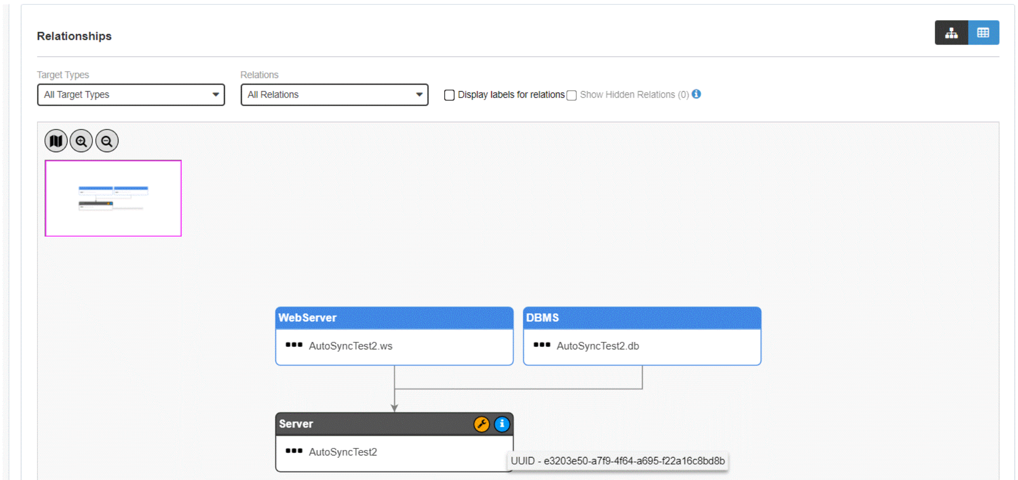
When you select a CI from the Configuration Item List data table, Oracle Advanced Support Platform displays the information about that CI in an individual Details page.



In this area, you can view amd select a number of CI attributes, such as *Details*, *Relationships*, and *CI Groups*, and so on.

Viewing Configuration Item Relationships

Select the **Relationships** tile to displays the CI's for the selected system in a hierarchical tree. The Web Server and DBMS are top-level CIs, and the Server is the subordinate.



Viewing Tickets and Events

Use the **Tickets and Events** area to view or search for:

- Incident (Management) tickets associated with the selected CI
- Change (Management) tickets associated with the selected CI
- Customer Special Instructions
- Events

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 CI's.

Viewing the Properties of a Configuration Item

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 Oracle users only or to all users. For each property, Oracle Advanced Support Platform also displays the source of the CI, that is, whether OEM or Oracle Advanced Support Platform.

Viewing Services and Service Options

Use the **Services** area to view the Service and Service options assigned to the selected CI. You can refresh the content by clicking **Refresh**.

Viewing Vendor Support Contracts

Use the **Vendor Support Contracts** area to view the vendor support contracts associated with the selected CI.

Viewing Configuration Item Groups

Use the **CI Groups** area to view the list of CI Groups to which the selected CI is assigned.

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 the CI.

Viewing Configuration Item Attachments

Use the **Attachments** area to view and download files associated with the selected CI.

Viewing Configuration Item Credentials

Use the **Credentials** area to view the credentials associated with the selected CI. By selecting the credential, you can drill down to the Credential Details and Credential Activity sections.

Searching for Configuration Items

Oracle Advanced Support Platform enables users to locate and access CI's using both filtering and grouping features.

To search for CI's you are authorized to access you can use a set of filters that enable you to customize the search criteria to fit your requirements based on one or more CI parameters.

Use the following CI custom filter parameters as search criteria:

TABLE 3 CI Search Custom Filter parameters

Filter parameter	Definition
Configuration Item	Name of the CI.
Customer	Name of a customer associated with the CI.
Status	The status of the CI, such as *No Service*, *Staging*, or *Production*.
Type	Type of CI, such as: ■ *Agent* ■ *CTA* ■ *Database Instance* ■ *Database Machine* ■ *DBMS* ■ *Exadata* ■ *Host* ■ *Operating System* ■ *Oracle Home* ■ *Physical Element* ■ *Server* ■ *Web Server*
Primary IP	Primary IP address associated with the CI.
Model	The model of the CI, such as *Exadata Rack PDU*, *OEM Agent*, *WebLogic Domain*.
Facility	The facility associated with the CI.
Serial #	A serial number used to uniquely identify a CI object or entity.
UUID	A number used to uniquely identify the CI (on the Internet.)
EM Target GUID	A number used to uniquely identify the Oracle Enterprise Manager target.
Source	The source of the CI: ■ OEM ■ Oracle Advanced Support Portal ■ OEM Migrated ■ Oracle Advanced Support Portal Migrated
External_ID	External identifier used to uniquely identify the CI.

Filter parameter	Definition
Services	The services associated with the CI.
IP	An IP address associated with the CI.

To search for, and view a CI:

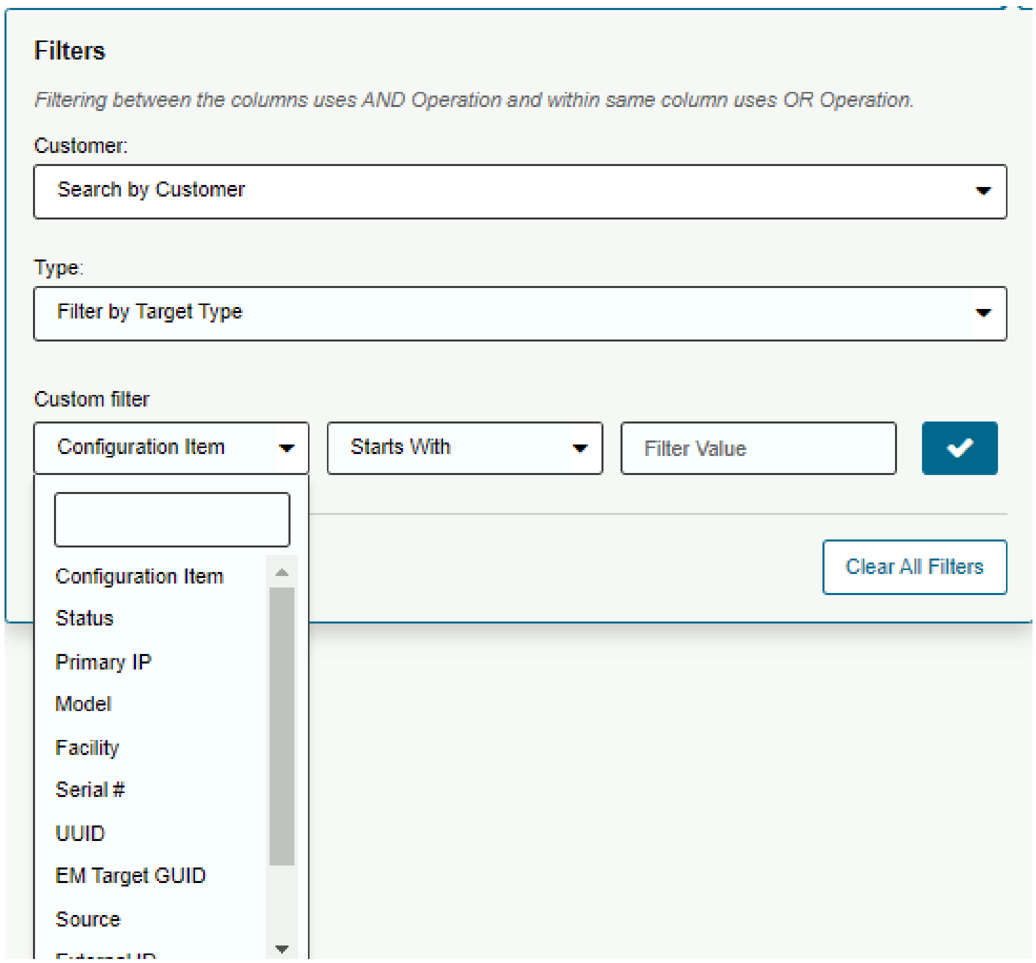
1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. From the top-level menu, click **Assets** and then click **Configuration Item List**.

   The Configuration Item List data table appears. The browser and search functions are combined in this table.
3. Enter the CI name or serial number in the **Search** field.
4. Select the type of search criteria using the **Filters** options:
   - (Optional) From the **Customer** field, select the required value from the list
   - (Optional) From the **Type** field, select the required value from the CI Search Custom Filter parameters table above.
   - In the **Custom Filter** field, narrow the search using one of the values from the CI Search Custom Filter parameters table above.

     A list of items meeting the filter criteria appear.
5. Click the name of the CI to access the Configuration Item dashboard.

FIGURE 14 Searching for a CI



Managing Configuration Item Facilities

You can use the Facility Management to view and create CI facilities. See:

- "Viewing Configuration Item Facilities" on page 53

- "Viewing Vendor Support Contracts" on page 53

Viewing Configuration Item Facilities

To view Configuration Item (CI) facilities:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. From the top-level menu, click **Assets**, then click **Facilities**.

   The Facility Management page appears.
3. Use the individual columns, such as *Facility Name*, *City*, or *Country* to reorder the results.

Viewing Vendor Support Contracts

You can view contracts between customers and external vendors to support Configuration Items (CI's, or assets) monitored by Oracle. You can also create new vendors.

A Vendor Support Contract (VSC) contains all of the information required to connect to a particular external vendor including a list of assets covered by the contract.

To view CI facilities:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. From the top-level menu, click **Assets** and then click **Vendors**.

   The Vendors page appears.
3. Locate the required vendor and click the vendor's name.

   The list of linked CI's appears where you can review the information on the CI and CI Groups linked to the current vendor.

Using Incident Management

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

- "About Incident Management" on page 54.

- "Searching Incident Tickets" on page 54.
- "Viewing Incident Tickets" on page 57.
- "Creating Incident Tickets" on page 57.

Note - If you cannot see the **Monitoring** menu item when you log in to Oracle Advanced Support Platform, contact your Oracle Advanced Support Platform customer user administrator.

About Incident Management

When service-impacting events occur in an IT environment that require intervention and communication, Oracle Advanced Support Platform captures and manages this data as *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 Management.

Searching Incident Tickets

Depending on the authorization associated with your Oracle Advanced Support Platform login, you can search for open Incident Tickets through the main menu.

To search for incident tickets:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. From the top-level menu, do one of the following:

   a. From the advanced search area on the top-right of the user interface, select the down arrow and click **Incident**. Enter the search string.

      (If the search is unsuccessful, revert to the IM search page.)

   b. Click **Monitoring** and then click **Search IM Tickets**.

   The Search IM Ticket page appears.
3. (Optional) From the **Search Filter** field, select a saved search filter to apply to the ticket search.
4. Use the criteria in the following table to search for an Incident Ticket. Then:

   a. (Optional) When complete, click **Save as My Filter** to save the search results for reuse.

   b. Click **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.

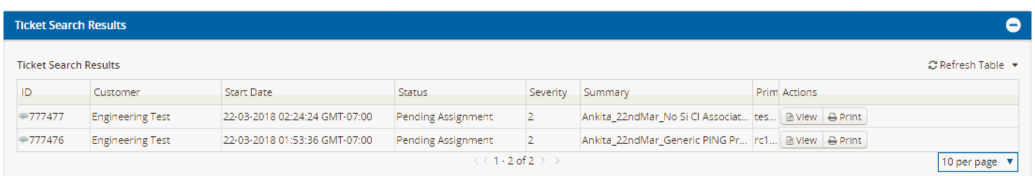
TABLE 4 Incident search filter parameters

Filter parameter	Definition
Ticket ID	The Incident Ticket identifier.
Ticket Summary	The Incident Ticket summary.
Knowledge ID	My Oracle Support Service Knowledge Article identifier.
MOS SR IDs	My Oracle Support Service Request identifier. If entering multiple MOS SR identifiers, separate them using commas or spaces.
Ticket External Ref ID	The reference ticket ID from an external ticketing system. There is also an option to check a box if this is ticketed only.
CI/CI Group Name	The name of the CI or CI Group associated with the Incident Ticket.
Date Type	Select one of the following options: ■ Creation Date ■ Start Date
Time Frame	Select **Use Time Frame** if you want to search within a predefined time period, such as the last 24 hours, or the last full month. Select **Custom** to specify a time frame.
Begin date	**Note -** This field is used only when creating a custom time frame. Use the calendar icon to select a start date to create a time period within to search.
End date	**Note -** This field is used only when creating a custom time frame. Use the calendar icon to select an end date to create a time period within to search.
Geo Filter	Select a geographical filter from the list.
Ticket Owners	Select the "owner" associated with the ticket.
Ticket Tag	Select any tags that you want to associate with the search: ■ Applications ■ Backup ■ Database ■ Hardware ■ Monitoring ■ Network ■ OS ■ Security ■ Storage
Customer	Select the customer name from the list.
Ticket Creators	Select the creator of the ticket.

Filter parameter	Definition
Queue Filter	Select the queue filter.
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 The default is that *all* working tickets are selected.
Ticket Severity	Refine the search to select tickets with specific severities: ■ 1 ■ 2 ■ 3 ■ Tuning
Service Interruption	Refine the search to select tickets with one of the following Service interruption statuses: ■ Active Service interruption ■ Has never been a Service interruption ■ Service interruption that has been deactivated

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

FIGURE 15 IM Ticket Search Results



You can choose to display 5, 10, 25, 50, or 100 tickets per page. 10 tickets per page is the default. Sort the data by clicking any column heading.

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

Click **View** to display the Incident Ticket. See "Viewing Incident Tickets" on page 57.

Click **Print**, and then use your browser’s print function to print the contents of this page.

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 page appears.
2. Click **Monitoring** and then click **Search IM Tickets**.
3. From the Search IM Ticket page, search for Incident tickets as described in “Searching Incident Tickets” on page 54.
4. 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 **Ticket Details** and **WorkLog** sub-pages 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.
5. (Optional) Review the contents of the **EventLog**, **Special Instructions**, and **Attachments** sub-pages.
6. (Optional) Use your browser’s print function to print the contents of this page.

Creating Incident Tickets

You can use Oracle Advanced Support Platform to create an Incident Ticket manually.

You typically 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 (CI's) that are impacted by the incident.

Note - Sources such as Oracle Advanced Support Platform or an event generated from the Event Management system or an external application can generate Incident Tickets automatically.

To create an Incident Ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.

2. From the **Create** list on the top-right of the user interface, that enables you to perform one-click creation of incidents, change requests, and report subscriptions, click **Incident**.

   The Incident Ticket creation page appears.

3. 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. The Queue field is completed automatically.

   b. (Optional) In the **Ext Ref ID** field, enter a ticket reference number created by a third-party ticketing system, if applicable.

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

      - 1
      - 2
      - 3

   d. (Optional) From the **Tags** list, select tags to classify the Incident Ticket:

      - Applications
      - Backup
      - Database
      - Hardware
      - Monitoring
      - Network
      - OS
      - Security
      - Storage

   e. (Optionally) In the **MOS SR IDs** field, optionally enter multiple My Oracle Support (MOS) service request (SR) numbers separated by commas or spaces. This field uses free text.

   f. In the **Summary** field, enter a summary of the incident to a 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.

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   g. (Optionally) In the **Description** field, enter a full description of the incident.

   h. (Optionally) In the **BCC Emails** field, enter customer email details to a maximum of 255 characters per email address in comma-separated format.

   By submitting customer email details, the customer is then notified by email. The email notification contains an embedded hyperlink to the incident ticket.

Note - *All* notifications received by IM email subscribers will also be sent to the above email recipients.

---

4. (Optional) In the **Configuration Items** area, click **Add** to add assets impacted by the Incident as required.

   The CI Picker window appears. For information about selecting assets, see "Searching for Configuration Items" on page 50.
5. 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 email (the email 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 Work in Progress (WIP) status.

Using Change Management

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

- "Creating and Managing an Approval Matrix" on page 80.
- "Starting Change Management Tickets" on page 81.
- "Completing Change Management Tickets" on page 83.
- "Closing Change Management Tickets" on page 84.
- "Canceling Change Management Tickets" on page 85.

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 (CI's, or assets) 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.

About 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 CI's 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 CI's 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 email 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.

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

- Create a new Change Management Ticket. See "Creating Change Management Tickets" on page 61.
- Clone a Change Management Ticket. See "Cloning Change Management Tickets" on page 67.

Creating Change Management Tickets

Use this procedure to create a new CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. From the **Create** list on the top-right of the user interface, that enables you to perform one-click creation of incidents, change requests, and report subscriptions, click **Change Request**.

   The Create CM Tickets page appears.
3. In the **Identification** area, define the following information:

   a. From the **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 generally worked through the Control Center.

      - *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 email. You must enter the related Incident Ticket ID on the CM page before you can submit an Emergency CM ticket.

   b. From the **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 - Account Management*: Indicates changes from the customer relating to a specific area of account management.
- *Customer - Application*: Indicates changes from the customer relating to a specific application.
- *Customer - Database*: Indicates changes from the customer relating to a specific database.
- *Customer - Hardware*: Indicates changes from the customer relating to specific hardware.
- *Customer - Network*: Indicates changes from the customer relating to a specific network.
- *Customer - OCM*: Indicates changes from the customer relating to OCM.
- *Customer - Operating System*: Indicates changes from the customer relating to an OS.
- *Customer - Security*: Indicates changes from the customer relating to security.
- *Customer - Software*: Indicates changes from the customer relating to software.
- *Customer - Storage*: Indicates changes from the customer relating to storage.
- *Customer - Web Server*: Indicates changes from the customer relating to Web Server.
- *Support - Account Management*: Indicates changes from the Oracle Service Delivery team relating to a specific area of account management.
- *Support - Application*: Indicates changes from the Oracle Service Delivery team relating to a specific application.
- *Support - Database*: Indicates changes from the Oracle Service Delivery team relating to a specific database.
- *Support - Hardware*: Indicates changes from the Oracle Service Delivery team relating to specific hardware.
- *Support - Network*: Indicates changes from the Oracle Service Delivery team relating to a specific network.
- *Support - OCM*: Indicates changes from the Oracle Service Delivery team relating to OCM.
- *Support - Operating System*: Indicates changes from the Oracle Service Delivery team relating to an OS.

- *Support - Security*: Indicates changes from the Oracle Service Delivery team relating to security.
- *Support - Software*: Indicates changes from the Oracle Service Delivery team relating to software.
- *Support - Storage*: Indicates changes from the Oracle Service Delivery team relating to storage.
- *Support - Web Server*: Indicates changes from the Oracle Service Delivery team relating to Web Server.

d. From the **SubClass** list, select a subclass to associate with the classification selected above.

For example, if you selected *Customer - Account Management*, then the possible subclass values are:

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

4. 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 following options are available:

- Advanced Monitoring team
- Partner
- Multiple parties
- Customer

c. (Optional) In the **Implementer** field, enter the name of the person responsible for implementing the CM ticket.

d. (Optional) From the **Approval Matrix** list, select an approval matrix. This list contains all your defined approval matrices 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.

e. (Optional) In the **Implementer Contact** field, enter the contact information for the person responsible for implementing the CM ticket.

f. (Optional) In the **Support Resource** field, enter the user name of the named support resource assigned to the CM ticket.

g. (Optional) In the **Contact Info** field, 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; easy to back out.
- *Low*: Routine, day-to-day, changes with minimal impact.

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

a. In the **Summary** field, 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. ((Enter text to a maximum of 80 alphanumeric characters.)

b. In the **Description** field, 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** field, enter a description of the reason for the change you want made.

d. (Optionally) In the **BCC Emails** field, enter customer email details to a maximum of 255 characters per email address in comma-separated format.

By submitting customer email details, the customer is then notified by email. The email notification contains an embedded hyperlink to the CM ticket.

Note - *All* notifications received by CM email subscribers will also be sent to the above email recipients.

---

6. (Optional) In the **Configuration Items** area, click **Add** to add configuration items impacted by the change.

The CI Picker window appears. For information about selecting CI's, see "Searching for Configuration Items" on page 50.

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

- **Filter**: Select to filter events for the CI's associated with this CM ticket from the Support Center screens.

  Events for the associated CI's will be ignored during the change process.

- **Timing is Critical**: Select 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 re-approved.

- **Monitoring Impacted**: Select to indicate that monitoring services are impacted as a result of this change request.
- **Inventory Impacted**: Select to indicate that inventory (CI's) are impacted as a result of this change request.
- **Backups Impacted**: Select to indicate that backup services are impacted as a result of this change request.

8. In the **Scheduling** area, define the following information:

Note - You must have appropriate privileges to enter scheduling information for the CM ticket you are creating.

---

a. Set **Recurring** to either *Yes* or *No*, depending 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 CI's.

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

Note - The status for recurring change requests alternates between WIP and Scheduled until the final scheduled implementation task is complete.

---

b. (If you selected **Yes** for recurring maintenance):

- In the Recurring Period field, 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 whether the CM ticket requires maintenance infinitely.

  If you select *No*, the Recurring End Date field appears.
- (If you did not select **Infinite Recurring**) In the *Recurring End Date* field, click the calendar icon beside it. In the calendar, select the date on which recurring maintenance on the CM ticket will end, and then click **OK**.

c. In the **Requested Date** field, click the calendar icon beside the Requested Date field. In the calendar, select the date that the change was requested, then click **OK**.

Note - Oracle Advanced Support Platform displays the local time zone abbreviation beside the date. To change the time zone, see "Customizing Your User Profile" on page 37.

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d. In the **Scheduled Start Date** field, click the calendar icon beside it. In the calendar, select the date on which work on the change request will begin, then click **OK**.

Note - Oracle Advanced Support Platform displays the local time zone abbreviation beside the date. To change the time zone, see "Customizing Your User Profile" on page 37.

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

f. Click the time zone link beside the **Local Timezone for DST Calculation** field 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.

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

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

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

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

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

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

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

    d. In the **Dependencies** field, 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.

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

    a. 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 email notification contains an embedded hyperlink to the CM ticket.

b. 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 through an email notification containing an embedded hyperlink to the CM ticket:
  - Change Implementers
  - Change Owner
  - Change Requester
  - Email Subscriber List

Cloning Change Management Tickets

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 Tickets** page with all of 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 page appears.
2. From the top-level menu, click **Management** and then click **My CM Tickets**.

   The Change Management page appears.
3. Locate the CM ticket that you want to clone, then click **View** or **Update**.

   The View CM Ticket or Update CM Ticket page appears.
4. Click **Clone**.

   The Create CM Tickets 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 Emails, Scheduling, Worklog, and Attachments.

---

5. Review and modify the information on the Create CM Tickets page as required.

   For more information about the data on this page, see "Creating Change Management Tickets" on page 61.
6. You can save the CM ticket as a draft or submit the CM ticket.
   a. 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 email notification contains an embedded hyperlink to the CM ticket.

   b. 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 through an email notification containing an embedded hyperlink to the CM ticket:
        - Change Implementers
        - Change Owner
        - Change Requester
        - Email Subscriber List

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 page appears.
2. From the top-level menu, do one of the following:

   a. From the advanced search area on the top-right of the user interface, select the down arrow and click **Change**. Enter the search string.

      (If the search is unsuccessful, revert to the CM search page.)
   b. Click **Management** and then click **Search CM Tickets**.

   The Search Criteria page appears.
3. Use the criteria in the following table to search for a CM ticket. Then:

   a. (Optional) When complete, click **Save as My Filter** to save the search results for reuse.
   b. 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.

TABLE 5 Change Management ticket search parameters

Filter parameter	Definition
Ticket ID	The Change Management (CM) ticket identifier.
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 one of the following options: ■ Creation Date ■ Requested Date ■ Schedule Start Date
Time Frame	Select if you want to search within a predefined time period, such as the last 24 hours, the last full month, this mo future. Select **Custom** to specify a time frame.
Begin date	**Note -** This field is used only when creating a custom time frame. Use the calendar icon to select a start date to create a time period within to search.
End date	**Note -** This field is used only when creating a custom time frame. Use the calendar icon to select an end date to create a time period within to search.
Ticket Status	Select the status of the CM ticket or select **All** to search for CM tickets of all statuses.

Filter parameter	Definition
	The available statuses are: ■ Draft ■ Pending Approval ■ Pending Scheduling ■ Scheduled ■ WIP ■ Completed ■ Closed ■ Cancelled
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 associated with 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 Inacti will not appear in the list. For information about inactive users, contact your Oracle Support representative.

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

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

Use your browser’s print function to print the contents of this page.

Click **View** to display the CM Ticket. See “Viewing Change Management Tickets” on page 70.

Viewing Change Management Tickets

To view a CM ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. From the Search CM Tickets page, search for CM tickets as described in “Searching Change Management Tickets” on page 68.
4. To view a CM Ticket, locate the CM Ticket, then click **View**.

   The View CM Ticket page appears for the selected CM Ticket.

Note - If any of the CI's 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

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5. (Optional) Review the contents of the **EventLog** and **Attachments** tabs.
6. (Optional) Use your browser's print function to print the contents of this page.

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 CI's from a CM ticket, assign the CM ticket to an individual or group that 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 page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. From the Search CM Tickets page, search for CM tickets as described in "Searching Change Management Tickets" on page 68.

   The Change Management page displays a list of CM tickets pending action from which you can choose.
4. Click **Update**.

   The Update CM ticket page appears.
5. Update the information on the Ticket Details sub-page as required.

For more information about this page, see "Creating Change Management Tickets" on page 61.

Note - If any of the CI's 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

---

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 field 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 email.

   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 email 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 page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. From the Search CM Tickets page, search for CM tickets as described in "Searching Change Management Tickets" on page 68.

   The Change Management page displays a list of CM tickets pending action from which you can choose.
4. Click **Update**.

   The Update CM ticket page appears.
5. Locate the **Implemented By** field.

   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 Oracle Advanced Support 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 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 email 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 Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. Locate the CM ticket you want to submit (look for tickets with the status set to *Draft*.)
4. Click **Update**.

   The Update CM ticket page appears. It displays a list of CM tickets pending action from which you can choose.
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” on page 61.
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 Email Subscriber List.

  The email 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 workflow.

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 page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. Locate the CM ticket you want to schedule (look for tickets with the status set to *Pending Scheduling*.)
4. Click **Update**.

   The Update CM ticket page appears.
5. 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). For more information, see "Assigning Change Management Tickets" on page 73.

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

   During the change window specified, CM tickets with filtering selected will cause all events associated with the affected CI's 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 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 CI's.

   Note - 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 field.

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

   c. 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.)

   ---

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

   Oracle Advanced Support Platform performs the following:

   - Sets 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.

- Adds a Worklog entry for scheduling.
- Triggers the timer for implementation and updates 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.
- Notifies the following: Change Implementer(s), Change Owner, Change Requester, Change Approver, and Email Subscriber List.

  The email 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 email subscriber list for CM tickets scheduled as recurring.

Tip - 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*.

About Scheduled Change Management Tickets

This section provides further 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 **Save** once you've updated the time period.
- **Updating the Scheduled Start Date**: 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 the CM ticket 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 **Save** 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 *WIP* status. The system moves the CM ticket to *Completed* once the new Scheduled Duration period is reached. You can choose to manually move the CM ticket to *Completed* at any time by clicking **Complete**.

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 *Approved* 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 selects 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 page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. Locate the CM ticket you want to approve (look for tickets with the status set to *Pending Approval*.)
4. 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:

      - 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 to *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 approve the ticket, the ticket moves to the *Pending Scheduling* status.
  - If at least one level rejects the ticket, the ticket reverts to *Draft* status.
- One of the most senior approvers has approved or rejected the ticket with the **Expedite CM** check box selected:
  - 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 page appears.
2. Click **Management** and then click **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 previously defined.
3. 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.
4. Update the draft approval matrix as follows by clicking the following links as required:
   - **Add a New Level**: Add a new approval level.
   - **Remove This Level**: Select to remove an approval level.
   - **Add Selected Users to this Level** - Select users to add to an approval level, and then click to add.
   - **Remove Selected Users** - Remove users by clicking the red ’X’ beside each user.

   Note - Note that each level provides the following strategy options:
   - **Consensus**: Select to require that all approvers listed at this level approve the CM.
   - **Representative**: Select to require a single approver at this level.

   ---

5. When you have completed all changes, check the red check field 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 either be started automatically by the system, or manually by selecting **Start**. You use **Start** for CM tickets that need to be started immediately, such as Emergency CM tickets.

After a CM ticket is scheduled, you may click Start 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 **Start** on a recurring CM ticket. Recurring CM tickets must always be scheduled.

Before you begin:

- The CM ticket must be in *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.

   The Oracle Advanced Support Platform home page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. Locate the CM ticket you want to approve (look for tickets with the status set to *Scheduled*.)
4. Click **Update**.

   The Update CM ticket page appears.
5. 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).

   For more information, see "Assigning Change Management Tickets" on page 73.

   a. If the **Implementer Queue** field is displayed, select the service queue responsible for the individual implementation steps.
   b. In the **Implementer** field, enter the name of the individual responsible for performing the implementation tasks.
6. 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 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.)

---

7. Click **Start** to start implementing the change ahead of the scheduled time.

   When you click **Start**, the Change Management service application initiates the Start workflow.

   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*.
8. 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 Email Subscriber List. The email 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 email subscriber list for CM tickets scheduled as recurring.

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

Completing Change Management Tickets

CM tickets can be completed automatically either by the system, or manually by selecting **Complete**.

A CM ticket must be in *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 Platform home page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. Locate the CM ticket you want to complete (look for tickets with the status set to *WIP*.)
4. Click **Update**.

   The Update CM ticket page appears.
5. On the Update CM Ticket page, select **Complete**.

   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.
6. 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 Email Subscriber List.

     The email notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.

Closing Change Management Tickets

CM Tickets can either be closed automatically by the system or manually by selecting **Close**. A CM ticket must be in *Completed* status before it can be closed. In addition, if a post implementation review is required, you must wait until after the post implementation review is completed before closing the CM ticket. Once a CM ticket is completed, you may click **Close** to close the CM ticket; otherwise the system automatically closes the CM ticket once its timestamp reaches 24 hours in *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 page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. Locate the CM ticket you want to close (look for tickets with the status set to *WIP*.)
4. Click **Update**.

   The Update CM ticket page appears.
5. On the Update CM Ticket page, select **Close Ticket**.

   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.
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 that closed the CM ticket.
   - Advance the CM ticket to *Closed* status.

     Note - You cannot reopen or edit a Closed CM ticket.

Canceling Change Management Tickets

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 **Cancel**.

Note - 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 page appears.
2. Click **Management** and then click **Search CM Tickets**.
3. Locate the CM ticket you want to cancel (look for tickets with the status set to *Draft, Pending Approval, Pending Scheduling, Scheduled, or WIP*.)
4. Click **Update**.

   The Update CM ticket page appears.
5. On the Update CM Ticket page, select **Cancel**.

   When you click **Cancel**, the **Cancel Change Ticket** window appears.
6. 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 workflow. If you receive any errors, make the necessary corrections, and then cancel the CM ticket. After successfully canceling the CM ticket, its status will change to *Cancelled*..
7. The action of canceling 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 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 Email Subscriber List.

     The email notification has an embedded hyperlink to the CM ticket making it easy for the recipients to access it.

Using Problem Management

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

- “About Problem Management” on page 87.
- “Searching Problem Management Tickets” on page 87.
- “Viewing Problem Management Tickets” on page 89.

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 to then 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 Problem Management (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 page appears.
2. From the top-level menu, do one of the following:

   a. From the advanced search area on the top-right of the user interface, select the down arrow and click **Problem**. Enter the search string.

      (If the search is unsuccessful, revert to the PM search page.)

   b. Click **Monitoring** and then click **Search PM Tickets**.

   The Search PM Ticket page appears.
3. (Optional) From the **Search Filter** field, select a saved search filter to apply to the ticket search.
4. Use the criteria in the following table to search for a PM Ticket. Then:

   a. (Optional) When complete, click **Save as My Filter** to save the search results for reuse.

   b. Click **Search PM 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.

TABLE 6 Problem Management Ticket search filter parameters

Filter parameter	Definition
Ticket ID	The PM Ticket identifier.
Summary	The PM Ticket summary.
Priority	The priority of the PM ticket: ■ High ■ Medium ■ Low
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 **Use Time Frame** if you want to search within a predefined time period, such as the last 24 hours, the last full month, or all future. Select **Custom** to specify a time frame.
Begin time	**Note -** This field is used only when creating a custom time frame. Use the calendar icon to select a start date and time to create a time period within to search.
End time	**Note -** This field is used only when creating a custom time frame. Use the calendar icon to select an end date and time to create a time period within to search.
Customer	Customer associated with the PM Ticket.
Implementer	Name of the implementer.
Ticket Status	From the Ticket Status area, you can refine the search to select specific ticket status: ■ All Working ■ All ■ Submitted ■ WIP - Root Cause Analysis ■ WIP ■ WIP - Known Error - Workaround ■ WIP - Known Error - Change Request ■ Resolved ■ Closed The default is that all working tickets are selected.

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. Sort the data by clicking any column heading.

Viewing Problem Management Tickets

To view a PM Ticket:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. From the top-level menu, do one of the following:

   a. From the advanced search area on the top-right of the user interface, select the down arrow and click **Problem**. Enter the search string.

      (If the search is unsuccessful, revert to the PM search page.)

   b. Click **Monitoring** and then click **Search PM Tickets**.

   The Search PM Ticket page appears.
3. (Optional) From the **Search Filter** field, select a saved search filter to apply to the ticket search.
4. Use the criteria in the following table to search for a PM Ticket. Then:

   a. (Optional) When complete, click **Save as My Filter** to save the search results for reuse.

   b. Click **Search PM 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.
5. From the Ticket Search Results area, click the ticket number or click **View** for the selected ticket.

   The View PM Ticket page appears with the selected PM Ticket information.
6. Click the **Attachments** tab at the top of the View PM Ticket page.

   The Attachments page appears.
7. Review the files displayed as required.

Using Reporting

This section describes the reporting capabilities of Oracle Advanced Support Platform. It covers the following topics:

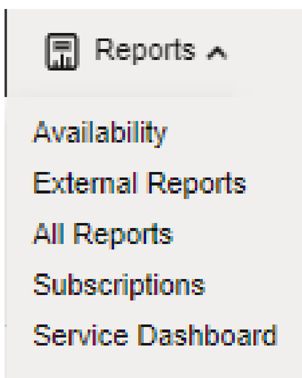
- "About the Report Menu" on page 90.
- "Generating Availability Reports" on page 91.
- "Viewing Reports" on page 92.

- "Viewing Favorites" on page 92.
- "Creating Subscriptions" on page 93.
- "Viewing Subscription Summaries" on page 95.
- "Viewing Reports from the Archive" on page 95.

About the Report Menu

You use the Reports menu to review summary reporting capabilities. 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.

FIGURE 16 User Interface: Reports Menu



The Oracle Advanced Support Platform report list displays all of the reports that 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**.

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.

Note - Oracle must first configure the availability reporting for each customer CI. Whether this is supported depends upon the service.

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 home page appears.
2. From the top-level menu, click **Reports** and then **Availability**.

   The Reporting page appears.
3. From the **Configuration Item** field, select the CI that you want to report upon.
4. From the **Probe** field, select the probe that you want to report upon.
5. From the **Time Frame** field, specify a predefined time period which you want the report data to cover, such as the last 24 hours or the past quarter.
6. (Optional) Select **Customize** to specify a time frame:

   a. In the **From** field, use the calendar icon to select a start date and time.

b. In the **To** field, use the calendar icon to select an end date and time.

7. In the **Style** field, *Summary* is displayed.

   You cannot change this value.

8. In the **Display** field, select the time interval required, such as hourly or daily.

   This value is determined by the selection in the **Time Frame** field.

9. Click Generate to create the report using the parameters specified in the steps above.

   Oracle Advanced Support Platform generates an availability report.

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 home page appears.

2. From the top-level menu, click **Reports** and then **All Reports**.

   The Reporting page appears.

3. Click the **Reports** tab.

4. Locate the report you want to view, then click the report name.

   The Reports page appears.

5. (Optional) For the relevant report, click **More actions** in the Advanced Operation column.

   A number of actions are displayed in a help bubble. Apart from performing edit, delete, or move actions, you can also select from the following options:

   - Click **CSV** to generate, download, and open a comma-separated version of the report.
   - Click **Archive** to review the list of past reports of this type.
   - Click **Subscribe** to create a subscription to this report. See "Creating Subscriptions" on page 93 .

Viewing Favorites

The Favorites area is displayed on the Reporting page. 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 an outline of the report. Click the query or report link to view more information about it.

To view a favorite:

1. Log in to Oracle Advanced Support Platform.

   The Oracle Advanced Support Platform home page appears.
2. From the top-level menu, click **Reports** and then **All Reports**.

   The Reporting page appears.
3. Click the **Favorite** tab.

   The Report List page reappears, displaying all favorite reports or queries, as appropriate.
4. Locate the report you want to view, then click the report name.

   The Report page appears.

Creating Subscriptions

When you create a subscription, you instruct Oracle Advanced Support Platform to email, 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 home page appears.
2. From the top-level menu, click **Reports** and then **All Reports**.

   The Reporting page appears.
3. Click the **Reports** tab.

   The Report List page reappears, displaying all reports or queries, as appropriate.
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, then click **Subscribe** to create a subscription to this report.

   The Create Subscription page appears.
6. In the **Subscription Title** field, enter a name for the report subscription, for example, *Jim's daily update of CMS inventory*.

7. From the **Report/Query** field, select the report or query you want to schedule to be delivered to a subscriber list.
8. From the **Date Period** field, select the date period for the report.
9. 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):
   - Select **Daily** to send a report on a daily basis. You must select the time of day at which the report should be sent.
   - Select **Weekly** to send a report on a weekly basis, You must select the day of the week on which the report should be sent.
   - Select **Monthly** to send a report on a monthly basis, You must select the day of the month on which the report should be sent,
   - Select **Quarterly** to send a report on a quarterly basis. You must select the day of the month on which the report should be sent.
   - Select **Yearly** to send a report on a yearly basis. You must select the day of the month on which the report should be sent.
10. From the **Deliver At** field (filtered from your Schedule Type selection), select the time of day.
11. From the **Time Zone** field, select the time zone region associated with sending the report.
12. From the **Date Format** list, select the date format associated with sending the report.
13. From the **Time Format** list, select the time format associated with sending the report.
14. From the **Email Format** list, select the format in which to send the report.
15. 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 field appears.

    a. Enter the maximum number of reports that you want to archive. 10 is the default maximum..
16. From the **Subscribers** area, select the report recipients by selecting the appropriate subscriber email list.
17. 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 home page appears.
2. From the top-level menu, click **Reports** and then **All Reports**.

   The Reporting page appears.
3. Click the **Reports** tab.

   The Report List page reappears, displaying all reports or queries, as appropriate.
4. For the relevant report, click **More actions** in the Advanced Operation column, then click **Subscribe** to create a subscription to this report.

   The Create Subscription page appears.
5. 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.

Viewing 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 home page appears.
2. From the top-level menu, click **Reports** and then **Subscriptions**.

   The Reporting page appears, open on the Subscriptions tab.
3. From the Subscription Summary page, locate the subscription that you want to edit.
4. From the View Archives column, click **View**.

The Archives page appears.

5. Locate the required report, then click **View**.