My Oracle Support Accreditation

Study Guide for My Oracle Support Level 1

Accreditation Resources

- Your Study Guide

  – Use your Study Guide along with the learning content to prepare for your exam.

  – The content in this accreditation is fast-paced and targeted to experienced users. We expect that you have been actively using My Oracle Support for 6-9 months and have been logging service requests and using the core functions.

  – We recommend you preview the series modules and study guide **before** you begin this accreditation.

  – This study guide provides links, use case details, and additional information to help you get the most from your learning experience, so please refer to it throughout your accreditation.

  – Make sure the content and level of information is right for your current level of experience. If any topic is new to you, take time to study it in more detail before continuing.

  – Make the program work for you by pausing or replaying any video, looking up actions in My Oracle Support, or asking questions in Community at any time. This is your accreditation experience, and we want you to enjoy it.

- Your Companion Resources

  – How to use My Oracle Support How-To Video Series – Document 603505.1

  – Accreditation Community – MOS Accreditation (MOSC)

  – **Contact Us** link – provided on the home page of this accreditation. Talk directly to the program team about questions or if you need assistance moving forward.
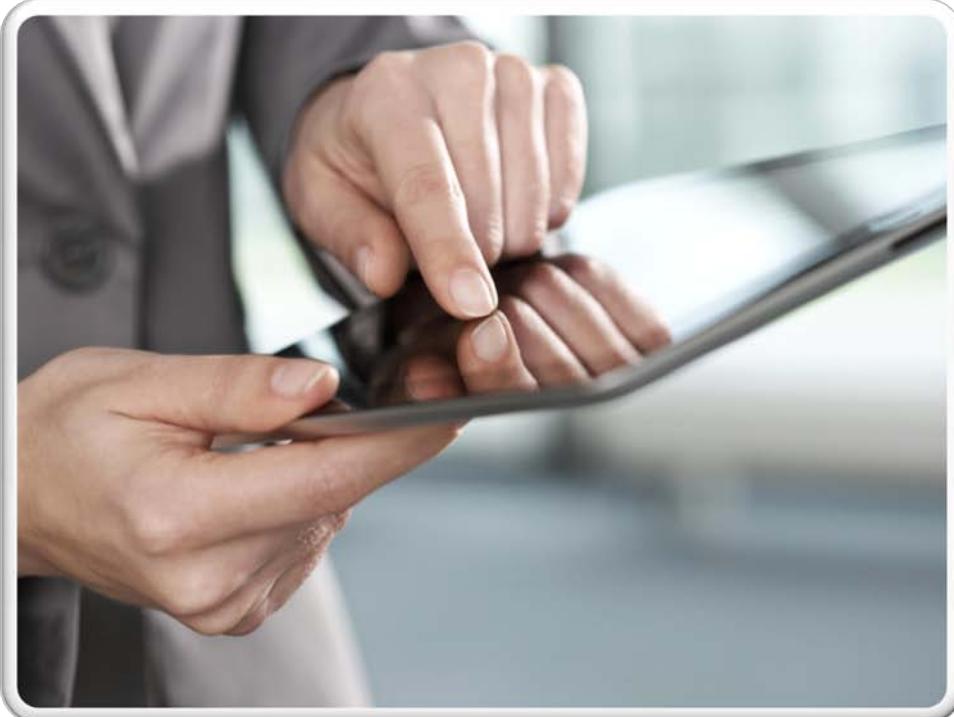
ORACLE®

Your Checklist

- The learning content in this accreditation is self-paced within My Oracle Support.

- Here are the modules we will cover in the Level 1 My Oracle Support Accreditation.

- As you navigate through the series, take note of modules you have completed.

- This is helpful if you need to take a break and resume your accreditation.

Module		I have completed this module
01	Introduction to Accreditation Program	
02	Customer User Administrator and Support Identifiers	
03	Introduction to My Oracle Support, My Account, Settings, Hot Topics	
04	Knowledge Searching, Browsing and PowerView	
05	Product Certifications	
06	Patches and Updates, searching and downloading	
07	My Oracle Support Community	
08	Best practices for Hardware and Software Support	
09	Creating and Managing Service Requests	
10	Mobile My Oracle Support	
11	Technical and Lifetime Support Policies	
12	Recap and Summary	

ORACLE®

Accreditation Results

Tools

Enhance your expertise with proactive tools for Oracle products.

Insights

Leverage insights about capabilities you already use – and take your experience to the next level.

Best Practices

Adopt recommended best practices from the use cases for faster results.

Toolkit

Build your personalized toolkit of key documents, resources, and tools – *customized* to your role.

Service Requests

Create fully qualified Service Requests to help you work with Oracle Support more effectively.

Introduction to Accreditation

- Accreditation is a self-paced learning program. You pick the time that works for your schedule to complete the content and take the exam. We suggest setting aside 2-3 hours (minimum) for the accreditation. Your individual time will vary.

- Use the Study Guide content as a companion resource to the video content.

- The majority of learning content is provided in video format. Each video is short (approx. 6-15 min) and opens in the page.

- You manage your viewing experience by using the control bar on the bottom of the video frame to pause, play, make the video full screen, or adjust the volume. You can also click and drag the cursor on the control bar to go back a few seconds.

- **Video tips:** If you mouse-over the video, the video name appears on top of the header bar (along with an information button). If you click the information icon, details about the video appear. Click the video image to return to the video view.

- When you take the exam, you receive **immediate notification** about your accreditation status in the exam interface.

- The accreditation exam is 60 questions (multiple choice, T/F) and requires a score of 80% to become a My Oracle Support Accredited User.

- Tip: There are no questions from Module 1 on the exam; it's just foundational information for you as you go through your accreditation experience.

Best Practice:
Leave the OU interface OPEN to review your results and access your completion certificate before closing the browser.

Customer User Administrator & SI

- My Oracle Support portal = personalized, proactive, collaboration support portal.

- Your Customer User Administrator (CUA) is an employee of your company that manages user access to My Oracle Support, admin permissions, asset permissions, and Support Identifier (SI) features. **Best practice** – set up 2 or more CUAs per SI.

- When you purchase products, the SI is created; your technical contact receives an email welcome letter with the SI; the first contact to sign into My Oracle Support <u>defaults</u> as your first CUA.

- Your CUA can leverage My Oracle Support or Mobile My Oracle Support to approve/deny access requests.

- A Support Identifier (SI) is a numeric value that identifies the products your company has purchased. It is required to access My Oracle Support. Support Identifier Groups allow users to group assets and products from different SIs into virtual groups.

- You can look up your SI access levels under Settings > My Account. For example, you might have Create and Update for service requests and Patch Download Access assigned to you. If you need help with your SI access, click Contact Us in My Oracle Support and log a non-technical service request.

- Your CUA can decide to use Auto Approval for specific types of access requests. **Best practice** – set up auto-approval for a specific SI that has general access to knowledge and community. This fast-tracks users who just want to browse My Oracle Support and review solutions.

- The CUA can also check 'Service Request Details in Email' option for users with Create and Update privileges for SRs.

MOS Accreditation (MOSC) | Support Identifier Groups | Get Proactive Essentials – CUA | Information Center: My Oracle Support – Support Issues |

My Oracle Support User Resource Center

ORACLE®

CUA and SI **Summary**

What you should know for your exam:

- ✓ The scope of the Customer User Administrator role

- ✓ Number of CUAs recommended for your business

- ✓ How to Locate your Support Identifier

- ✓ Receiving full Service Requests updates via email

- ✓ Support Identifier Groups

ORACLE®

Introduction to Oracle Support

- The number of tabs you see in My Oracle Support depends on the Support Identifiers associated with your account. Additional tabs can be found on the More tab. **Best practice** – check out what additional options are available to you and make sure you have the functions you need for your role. Your CUA can assist you.

- Asset access on Systems tab: You need an SI associated for HW on your account AND need to be approved to see assets by your CUA. Check access in My Account, Support Identifiers and then contact your CUA if you need updated access.

- Your CUA is your first point of contact for access issues in My Oracle Support. For example – click **Request Access** in My Account, Support Identifiers to ask for access to a new SI.

- Customize the dashboard for your role, products, and how you like to work > click on Customize Page and select regions based on what you need to see/use most often. Changes to the layout occur immediately. If you don't like the new layout, make additional changes. For example: a system administrator may want Assets at the top of their dashboard.

- **Best practice** – leverage the various Service Requests regions to make them highly visible and easy to locate whenever you access My Oracle Support.

- **Best practice** – Add the Getting Started region to your dashboard and place it near the top. This single resource has multiple links for ongoing learning and staying informed. It also offers information by New User and Experienced User to help you find what you need.

- Best practice – Use Hot Topics e-mail to stay informed. Access it in My Oracle Support > Settings > My Account > Hot Topics E-Mail. Add products, knowledge, bugs, news and other alerts to take advantage of automated email updates. Update your selections any time your role or interests change.

My Oracle Support Resource Center | Product Support News | My Oracle Support Quick Reference Guide | Using My Oracle Support (MOSC) Community

My Oracle Support Blog | Get Proactive Blog | My Oracle Support Twitter | Get Proactive Essentials Webcasts | Speed Training Videos

MOS Introduction **Summary**

What you should know for your exam:

✓ Understand Assets widget

✓ Setting up and Using Hot Topics Emails

✓ Customizing your dashboard layout

✓ Getting up to speed on My Oracle Support

Knowledge Search

- Check your current knowledge preferences – My Account > Knowledge Preferences. Make changes to define how you want to search. It just takes a moment to change your selections and apply the changes.

- Many users search by typing in a keyword in the Global Search bar. This will display a list of search suggestions as you type (based on your knowledge settings). Global Search is available on most tabs and results display on the **Knowledge** tab (KM Search Results) – search is most effective when you enter a phrase or keywords. Use quotes to search for a group of words – i.e., "How to Search" will highlight **How to Search** in the results.

- Knowledge tab – change your search results by changing your sources. Click on a source (i.e., Knowledge Base, Archive, Community) to add/remove and your results are updated in real time.

- Search on the Knowledge tab in the Knowledge Base Region (Search & Browse) – you can pick a product and locate an information center (if one exists, it will automatically display).

- Create PowerView filters to display only the information you need, such as the products, platforms, or Support Identifier. Look for the PowerView icon to display if your PowerViews are filtering content on the region you are in. **Best practice** – check to see if you have PowerViews turned on if you do not find what you need when searching.

- Assistants – Your search results find documents with the word Assistant in the title. Use Assistants to locate answers to a set of symptoms. Based on your answers to set of prompts, the Assistant displays documents that may have a solution.

- **Best practice** – click the Help menu (upper right corner) in My Oracle Support for online help related to where you are. The context-sensitive help is a great resource to quickly find information related to where you are within the portal.

Searching and Browsing Part 1 and 2 | PowerView | Oracle Premier Support: Get Proactive Portfolio | Get Proactive Essentials Webcast Series Finding Answers |

My Oracle Support Search and Browse Community

Knowledge Search **Summary**

What you should know for your exam:

✓ Managing your search responses in My Oracle Support

✓ Searching use search terms

✓ Search refinement

✓ PowerView filtering

Product Certifications

- The Certifications tab in My Oracle Support helps you understand how a product upgrade may affect other products or what product release you need for a new hardware platform. Why would you check Certifications? Validate HW product compatibility, determine what applications are affected by an OS upgrade, validate product compatibility, or determine if a specific product/release is currently certified.

- Search by product name on the **Certifications** tab to locate content. Use the interface to compare multiple products by release to determine compatibility or check a release on a specific platform.

- **Best practice** – Leverage release date information to ensure your products are supported through your planned upgrade cycle.

- **Best practice** – Use certification data to make informed recommendations to your upgrade team (i.e., Based on my research, I recommend we upgrade the E-Business Suite application and database at the same time).

- If a product certification is NOT shown for your configuration, use Global Search to find additional information. The relevant product community is often a good source to see if your specific question has been asked (and answered). If your product is not coming up in the Certifications tab, it doesn't mean there isn't a solution for you.

- Click 'Give Feedback' to see frequently asked questions or provide feedback to the certifications team on your needs. Use My Oracle Support Community > Locate the appropriate product sub-space and post your certification question.

- Oracle does not release information on planned or future certifications.

- If you need to get something certified that is not available, contact your Sales or Account Team representative.

Certify in My Oracle Support | Certifications Blog | Get Proactive Essentials Webcast Series | My Oracle Support Resource Center

Product Certifications **Summary**

What you should know for your exam:

✓ What is available on the Certifications tab

✓ When and why to check the Certifications tab

✓ Finding your product certification information

![ORACLE]

Patches and Updates

- Staying up to date with patches helps you avoid known issues and benefit from new functionality.

- A patch is code that fixes or provides additional functionality to your software. Patches may be referred to as a QuickFix, Update, Firmware, or Patch. Regardless of the name, your process to locate and download the patch is the same.

- Why patch? To maintain certified configurations to keep them current, application or hardware is performing slowly, or application experienced an issue and requires Oracle Support.

- Make use of available patching content like Patch Advisors – Doc ID 250.2. Type terms like 'patching advisor' in the Global Search.

- Use **Patches & Updates** tab for Patch Search, Patching Quick Links and patching resources. Be sure to click on Customize Page to see if there are additional patch regions you'd like to add to your view.

- Use Product or Family (Advanced) search to find fix packs.. Use the Clear button to clear previous search before starting a new one. **Best practice** – Click **Share Link** to easily share this information with your team.

- **Best practice** – Save time by accessing the step-by-step guidance from the Patching and Maintenance Advisor. You will get more done in a single location and take advantage of the sequenced information.

- Use the Collector to send configuration data to Oracle (if you plan to leverage the Patch Plans or Upgrade Planners). Patch Plans let you review patches against a specific configuration.

- Get help – Post your questions in My Oracle Support Community's product-specific patching communities. Use the Help menu on the Patches & Updates tab for more tips and help with patching. For example, there is a section on patch searching with details on what to do.

Oracle Support Lifecycle Advisors | My Oracle Support User Resource Center

Patching **Summary**

What you should know for your exam:

- ✓ Patch downloading
- ✓ Patch search technique
- ✓ Getting help with patching
- ✓ Patch Advisors and patch plans

My Oracle Support Community

- **Best practices for Community** – use it to research questions, find solutions, and leverage a network of expertise. If you aren't participating in community, you are missing out on a great resource.

- The same support engineers that handle your SRs also participate in community. Community is not a replacement for logging a service request, as some questions may need to be resolved via SR.

- Keep your profile updated via the 'Edit Profile' option from the drop-down menu next to your login. Be sure that you have updated your user name to your preferred name.

- Use the persistent top banner to locate sub-spaces of interest. You'll see a list of Spaces You Follow on the left. **Best practice** – do not follow a top-level Space as that means you are following all of the sub-spaces too – and that means a lot of potential updates. Select specific sub-spaces of interest and follow those.

- In your connection streams, you can turn on/off notifications to best meet your needs. **Best practice** – update your Preferences to control how you get notified.

- Look for top participants in your sub-spaces and wand-over their avatar to add them as a friend or confirm that you are following them and send them a message. Continue to build your network of contacts. Click your avatar, and wand-over your points to learn more about points.

- **Best practice** – If you post a question and get the answer you need, take time to mark the answer as Correct to help other users.

- Use the **ASK IT** function to type your question, review content, and start a discussion.

- View your community activity – select avatar, view profile, activity – to see the questions and replies you have posted.

My Oracle Support Community | Information Center: My Oracle Support Community (MOSC) | My Oracle Support Community FAQ | Advisor Webcast Current Schedule

ORACLE®

My Oracle Support Community **Summary**

What you should know for your exam:

- ✓ Locating the best community for your need
- ✓ Who is in community?
- ✓ Managing email notifications from My Oracle Support Community
- ✓ Using sub-spaces

Best Practices for HW and SW Support

The key focus is recommended best practices for both Hardware and Software support. This video is not a deep dive into these tools, but a re-cap of why these tools are important (and how they improve your support experience) … each of these areas also have specific application-based training and resources available.

- **Get Proactive Portfolio** – select your product and then access Best Practice tools and resources that enable you to Prevent, Resolve and Upgrade your Oracle products. Some of the features listed in the portfolio require the installation of Oracle Configuration Manager or the Oracle Hardware Support Tools bundle – Get Proactive Portfolio.

- **Oracle Configuration Manager (OCM)** – only collects your product **configuration** data to enable Oracle Support to quickly assist you resolving your issues. We have a very strict Data Security and Privacy policy in place to ensure only the Oracle Support Engineer working your issue has access to your configuration information. Analysis of configuration data is done on our side; therefore, no impact to your systems.

- **Oracle Services Tools Bundle** – a self-extracting tool with four components: Explorer is a set of shell scripts that gather information configuration, a system snapshot and current state; RDA captures a comprehensive snapshot of your environment for support for Mac OS, UNIX, VMS, and Windows; SNEEP allows for easy serial number identification for those older systems; and, ACT is a crash dump analysis tool – Oracle Services Tools Bundle.

- **Proactive Analysis Center** – How 'At Risk' is your Oracle Hardware and Operating System – PAC Information Center.

- **Automatic Service Request (ASR)** – enable your system to automatically notify Oracle Support and open a prioritized Service Request on your behalf when a specific hardware fault has occurred – Oracle Auto Service Request.

Get Proactive Essentials Webcast Series | Advisor Webcasts Current Schedule | Using Enterprise Manager Harvesters to Upload Configuration Data

Difference Between RDA and OCM? | OCM and My Oracle Support: FAQ and Troubleshooting | Oracle Explorer Data Collector Resource Center

Hardware and Software Support **Summary**

What you should know for your exam:

✓ Assets and permissions

✓ Understanding Oracle Configuration Manager (OCM)

✓ Auto Service Request (ASR)

✓ Fully Qualified Service Requests

ORACLE®

Creating and Managing Service Requests

- As an experienced My Oracle Support user, you are familiar with logging and managing service requests. You already know the SR creation flow – Problem > Solutions > More Details > Severity/Contact. In this module, we will recap a few key points and best practices.

- Use community – easy questions like 'how do I' can be effectively resolved in My Oracle Support Community. Think about WHEN a Service Request makes sense for your particular issue or question. **Best practice** – take advantage of My Oracle Support Community for non-urgent questions.

- The ability to create SRs is based on your access privileges in My Oracle Support AND your associated Support Identifiers. Confirm you have 'Create and Update' privilege before you log your SR – My Oracle Support > Settings > My Account. **Best practice** – Remember that your CUA manages your access and associated SIs so you can quickly get help when needed.

- The main way to log your Service Request is by using the **Create SR** button on the Service Requests tab.

- Log a Fully Qualified SR (all related support data is provided) to avoid delays and enable a faster resolution time. **Best practice** – it's important to take a few minutes to fully develop your SR. Many issues can be resolved sooner if the engineer has complete information and does not need to go back and forth with you to gather basic data. **Best practice** – Write a brief, detailed description of your issue. This is the foundation for your SR, and a quick glance at your description should give your engineer a very good idea of what you are asking.

- **Best practice** – leverage Suggested Solutions in the SR workflow; the solution to your problem may be right on the screen. Take a moment to review the suggestions before you continue.

- Know how to check (and update) your access to My Oracle Support to ensure it aligns with your needs (i.e., ability to create a Service Request). Not having the correct access level or correct SI are common reasons that a User cannot log a SR.

My Oracle Support Community | Escalate a Service Request with Oracle Support Services | My Oracle Support Resource Center | Get Proactive Essentials Webcast Series

ORACLE®

Service Requests **Summary**

What you should know for your exam:

✓ Handling non-urgent questions with Oracle Support

✓ Sending data to Oracle Support

✓ Understanding use of Severity 1

✓ Logging service requests

Mobile My Oracle Support

- As an experienced user that logs service requests, we suggest you add Mobile My Oracle Support to your personalized toolkit. You may have heard about, but are you using it?

- You just need your mobile device and Internet access. That's it. Get access when you need it, regardless of your location or device. You are not always at your desk when you need information or an update on your SR.

- **Best practice** – bookmark the URL for Mobile My Oracle Support to easily access it when you need it – https://support.oracle.mobi. Tip: There is Mobile Help & FAQ content under the More section in Mobile My Oracle Support.

- Being able to respond quickly to SR updates while on the go can help Support continue making progress on a solution.

- **Best practice** – Create filters for your SRs to focus on those you care most about monitoring (for example, SRs where you are the contact).

- Use Mobile My Oracle Support to review knowledge documents, mark them as favorites, and then review them more carefully when you are back in the office.

- Quickly research the status of an open SR during a team meeting to keep your colleagues up to date.

- Approve or deny user access requests if you are a Customer User Administrator.

- **Best practice** – approve users for default access levels (knowledge base and community) and then take a closer look at their access needs when you are back at your desk. This fast-tracks that user's ability to search for information in My Oracle Support.

Mobile My Oracle Support FAQ | How to Series: Mobile My Oracle Support | My Oracle Support User Resource Center | Using My Oracle Support Community

Mobile My Oracle Support **Summary**

What you should know for your exam:

✓ What is Mobile My Oracle Support?

✓ Available functions for general users and CUA users

✓ Best practices

ORACLE®

Support Policies

- When is the last time you looked up information about your product support? You may not do it often, but it's important to understand what is in your policies and how to locate them. Make sure you can locate your support policies and are effectively applying this information to your products (and your planning process). Quickly and easily confirm you have the coverage you need.

- Understand what is covered in Premier, Extended, and Sustaining Support and align this knowledge to your product planning cycles. Locate key support dates associated with your products.

- **Best practice** – leverage support information on the Certifications tab when reviewing and researching product certifications.

- Locate Support Policies from My Oracle Support or from www.oracle.com and quickly find these resources when you need to review your coverage. **Best practice** – take time to review and understand the Lifetime Support stages and benefits – Stages and Benefits matrix

- What is NOT covered? Not everything is covered in your support policies – actions like mapping business requirements, educating system admin staff on writing scripts, debugging code in unique customizations, or discussing future product releases are not part of your policy coverage.

- Patch download access (Settings, My Account) is directly related to the type of support coverage you have. Once a patch moves out of Premier support into Extended support, you may find you cannot access previously created patches. Review your patch download access if you are having trouble accessing patches.

- **Best practice** – you can also find documents where specific product teams have listed out additional content in My Oracle Support. Try typing 'technical support policy' and review your results.

- Post questions to the appropriate product-based community. Other users may have the same questions you do.

Oracle Lifetime Support Policies | Oracle Technical Support Policies

ORACLE®

Support Policies **Summary**

What you should know for your exam:

- ✓ Locate the support end date for your products

- ✓ What is covered by the policies?

- ✓ Locate the support policies

- ✓ Understand when you might need to access your policies

ORACLE®

Are You Ready to Get Accredited?

ORACLE®

You Have Completed the Learning Content

Leverage Your Study Guide

- We hope you followed our recommendation to use the study guide throughout this accreditation series.

- Take a few minutes to review the study content for each module.

- Check out the 'what you need to know for the exam' section at the end of each module.

- Make sure you understand the core functions and the suggested best practices.

Take Your Exam

- Click on **Take the Exam** from the <u>final</u> module page.

- Start your exam by clicking **Play**.

- Carefully review and answer each question. Click **Finish Test** to submit.

- If you do not pass, you can retake your accreditation exam once per 24-hour-period.

- Leave your final OU screen open while you review your results and print your certificate. Tip: You can also print your completion certificate from the <u>accreditation home page</u>.

Make Your Accreditation Work for You

- The value of your Accreditation comes from **continued use** of the highlighted capabilities and best practices to support your Oracle products.

- We recommend you implement at least 2-3 new best practices into your daily work as soon as you can.

- Confirm that your current settings in My Oracle Support enable the way you want to do business in the portal.

- Add the Getting Started region to your dashboard for easy access to resources for staying informed and learning.

- Leverage Hot Topics Emails to automatically update you on items of interest.

- Bookmark and use highlighted resources.

- Take advantage of My Oracle Support Community as part of your diagnostic process to post questions, share your experiences, and learn from experts who are actively using Oracle products in their business.

- Customize your personal toolkit based on the way you work.

Thank you for your time!

ORACLE®

Hardware and Software
Engineered to Work Together

ORACLE®