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Service Implementation Worksheet Guide
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Oracle Platinum Services Service Implementation Worksheet Guide, Release 13.0 for all platforms

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Preface

This guide provides information about how to use the Service Implementation Worksheet (SIW) when implementing Oracle Platinum Services.

Audience

This guide is intended for Oracle Premier Support customers running certified configurations on Oracle's monitored systems.

Additional SIW Questions

For additional questions, please contact the Oracle Support Services contact with whom you have been engaged for Platinum Services review ('Oracle Platinum Driver').

Please note that the SIW must be completed for each monitored system to be configured for Platinum Services.

Thank you for choosing Oracle Platinum Services.

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Document Revision History

The following table lists the revision history for this book.

Version	Date	Description
E69358-01	January 2016	Initial release.
E69358-02	September 2016	Update provided for the Oracle Advanced Support Gateway 6.1 release.

Introducing the Service Implementation Worksheet

This chapter provides an outline of the general Platinum implementation process and shows where the Service Implementation Worksheet (SIW) fits in the workflow.

The SIW customer invitation is described and an overview is provided of the principal SIW wizard screens to be completed.

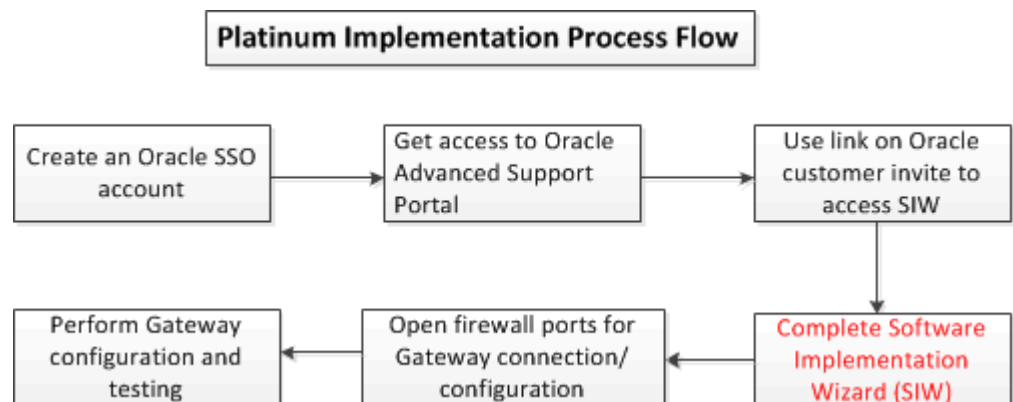
This chapter includes the following topics:

- [About the Platinum Implementation Process Flow](#)
- [About the Service Implementation Worksheet](#)
- [About the Service Implementation Worksheet Customer Invitation](#)
- [About the Service Implementation Worksheet Wizard Screens](#)

About the Platinum Implementation Process Flow

The general process flow for Platinum implementation is shown in [Figure 1-1](#). The step involving completion of the Service Implementation Worksheet (SIW) is colored for emphasis.

Figure 1-1 Platinum Implementation Process Flow



About the Service Implementation Worksheet

The Service Implementation Worksheet (SIW) is a key part of planning and executing an efficient and successful initialization and implementation of Oracle Platinum Services for Oracle monitored systems.

This document is designed to help you:

- Understand the SIW – the required data elements and why they are important
- Understand where to source the required data elements for the SIW
- Understand what constitutes a fully-qualified SIW to enable Oracle to begin the implementation process

You cannot be selected as a user associated to an SIW until your customer account is enabled. In order to access 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 access to Oracle Advanced Support Portal to that user. The customer can then activate the Oracle Advanced Support Portal account by logging in and accessing SIW.

Related Topics

[Completing the Service Implementation Worksheet](#)

About the Service Implementation Worksheet Customer Invitation

The customer must be invited by an Oracle representative to complete a Service Implementation Worksheet (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.

The content of the email is as follows:

Dear Customer,

Thank you for your interest in Oracle Platinum Services.

You are receiving this email because you are listed as the primary contact for the completion of the Service Implementation Worksheet (SIW). At any time, you may refer to the following link to view the information you completed in the [Service Implementation Worksheet](#). If you are unable to access the SIW link, please open an SR with Oracle Support.

Once you have completed filling the Service Implementation Worksheet, you will receive another notification email.

If you have any questions related to the SIW, please contact your Platinum Driver.

Thanks and Regards,

Oracle Platinum Services Team

By clicking the colored link in the email, the customer invokes a wizard to enable the completion of the Service Implementation Worksheet.

About the Service Implementation Worksheet Wizard Screens

Completing a Service Implementation Worksheet for Oracle Platinum Services involves performing five principal steps. The main wizard screens are described in the following sections.

- **Introduction.** See "[About the Introduction Screen](#)".
- **Gateway.** See "[About the Gateway Screen](#)".
- **Systems.** See "[About the Systems Screen](#)".
- **Agent.** See "[About the Agent Screen](#)".
- **Confirm.** See "[About the Confirmation Screen](#)".

About the Introduction Screen

The **Introduction** screen welcomes the user, outlines the benefits of Oracle Platinum Services, and provides information on completing the wizard steps for the SIW. It also supplies links to a number of documentation resources that are available to download as PDFs:

- Oracle Platinum Services data sheet
- Oracle Platinum Services FAQ
- Certified configurations for Oracle Platinum Services
- Oracle Advanced Support Gateway host system requirements
- Oracle Platinum Services technical support policy

About the Gateway Screen

The **Gateway** screen requires location information for the Oracle Platinum Gateway. In this step, the customer user can create a new Gateway by defining a new Gateway address, by defining a new Gateway using existing location information, or by selecting an existing Gateway.

About the Systems Screen

The **Systems** screen requires information about the customer's Oracle monitored systems.

About the Agent Screen

The **Agent** screen defines Oracle Enterprise Manager (OEM) 12c agent settings.

About the Confirmation Screen

The **Confirmation** screen allows you to review a summary of all of the information submitted in the SIW, and requires you to confirm all details by clicking **Complete**.

After submitting the confirmation, the **All Done** screen is displayed showing the Gateway name and related information. You can click a link on this screen to view the completed worksheet, and to activate the Gateway if required by using the gateway activation code. Activation is also possible using the Detail page (after the SIW is submitted).

Note: The gateway activation process is separate from completion of the SIW.

Activating the Gateway entails using an activation code to connect the customer Gateway to Oracle as soon as the Gateway is installed at the customer premises.

If a new Gateway was selected during SIW completion, an activation code is provided.

If an existing Gateway was selected, no activation code is generated.

About Activation Codes

Activation codes are Gateway-specific and are generated only for new Gateways. Each new Gateway requires a new activation code.

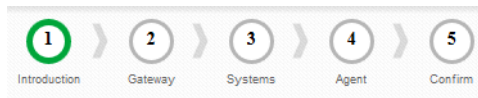
Customers should retain the SIW invitation email to enable them to review the SIW to keep track of the activation code.

About the Service Implementation Worksheet Process Flow

Figure 1–2 shows the SIW process flow that is displayed in the top right of the SIW wizard screen. The process flow is illustrated by circled numbers from 1 to 5, corresponding to the screens outlined above.

When a step is complete, the color of the circle changes. For example, in Figure 1–2, the first wizard step is complete.

Figure 1–2 *Service Implementation Worksheet Process Flow*



Completing the Service Implementation Worksheet

This chapter describes how to launch the Service Implementation Worksheet (SIW) wizard by clicking a link on an SIW invitation email from Oracle.

The Oracle Advanced Support Platform is then used to complete the SIW to manage service implementation requests for an Oracle Platinum Services customer.

Launching the Service Implementation Worksheet Wizard

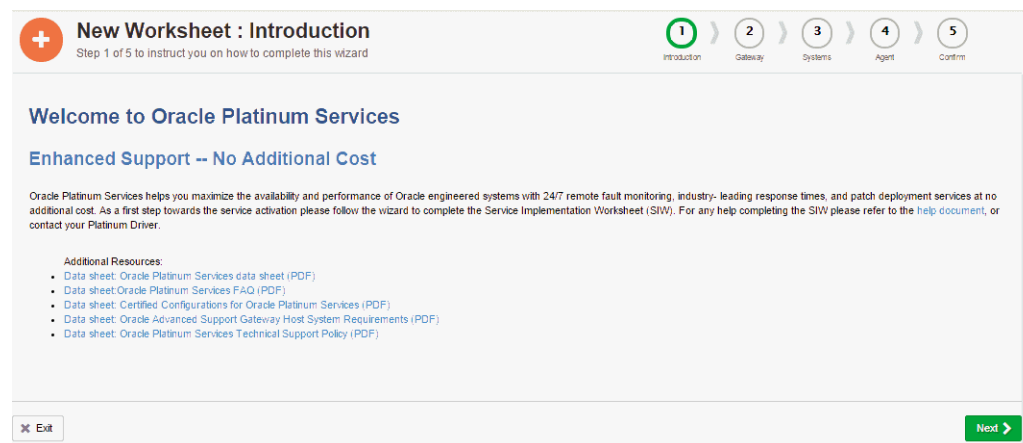
Before completing a Service Implementation Worksheet, ensure that you have received an email invitation from Oracle that provides a link to a named worksheet for the Platinum service. See "[About the Service Implementation Worksheet Customer Invitation](#)".

To complete a Service Implementation Worksheet:

1. From the SIW invitation email from Oracle, click the **Service Implementation Worksheet** link as outlined in "[About the Service Implementation Worksheet Customer Invitation](#)".

The **Introduction** screen appears.

Figure 2–1 Service Implementation Worksheet: Introduction



2. Click **Next**.

The **Gateway** screen appears.

Note: [Figure 2–2](#) displays only part of the screen.

Figure 2–2 Service Implementation Worksheet: Gateway

New Worksheet : Gateway

Step 2 of 5 to gather gateway location and contact information

Gateway * **New Gateway** Existing Gateway

Gateway Location

Location Source * **New Address** Select from Location List

Name *

Country * ▼

Address1 *

Address2

City *

State * ▼

Zip / Postal Code *

Specify the location and contact information for the Oracle Platinum Gateway. There are a number of options:

- Choose a new Gateway and specify a new facility address where the Gateway will be installed. In this case, you need to complete the full address, as shown in [Figure 2–2](#).
- Choose a new Gateway and select from the list of existing locations.
- Choose an existing Gateway. Its corresponding address will be loaded successfully.

Complete the gateway location, contact information, and other gateway parameters by following these steps:

- a. In the **Gateway** section, click **New Gateway** to create a new Gateway, or click **Existing Gateway** to use an existing Gateway.

If you choose to create a new Gateway, specify a new facility address where the Gateway will be installed, or select an existing location.

If you choose an existing Gateway, its address and location details are automatically loaded in the following steps.

- b. If you choose **New Gateway**, in the **Location Source** field, select **New Address** to specify the facility address where the Gateway will be installed, or select **Select from Location List** to choose an existing Gateway location.

If you select **Select from Location List**, the Select Gateway Location screen appears. See [Figure 2–3](#).

Figure 2-3 Select Gateway Location Screen

Select Gateway Location
Select one Location from the list below

Search

	Name ^	Address ^
Select	ct-testplatin-dw-1_testplatin	1234 Hwy 55, RTP, NORTH CAROLINA, United States of America, 27615
Select	555_testplatin	555,666, N/A, Bahrain, 666
Select	asdfads_testplatin	asdf.asfdsa, N/A, Côte d'Ivoire (Ivory Coast), asfadsf
Select	Bogdan Ivan_testplatin	Floreasca Park, 43 Pipera Street, Bucharest, N/A, Romania, 077777
Select	ct-foobar-02_testplatin	123 Main St, Walnut Creek, CALIFORNIA, United States of America, 94596

From the list of Gateway locations, click **Select** to choose a Gateway location.

- c. In the **Name** field, enter the name of the Gateway location.
- d. In the **Country** field, select the country in which the Gateway is located.
Depending on the country selection, the remainder of the fields are adjusted. For example, if you select *United States of America*, the **State** field is automatically populated with the states.
- e. In the **Address 1** and **Address 2** fields, enter the full address of the Gateway location.
- f. In the **City** field, select the city in which the Gateway is located.
- g. In the **State** field, select the state in which the Gateway is located.
- h. In the **Zip/Postal Code** field, enter the details of the ZIP code, or postal code, as applicable.
- i. In the **Gateway Contact** area, enter the details for the contact: email address, phone number, and name.

Next, you need to complete the following gateway parameters for all gateway hardware (not limited to Oracle supplied hardware):

- a. In the **Gateway Hardware Vendor** field, select **Oracle** or **Third Party**.
If you select **Third Party**, that concludes the configuration of the Gateway screen. Go to [step 3](#) to continue to the **Systems** screen.
If you select **Oracle**, complete the following Gateway parameters.
- b. In the **Primary IP Address of OASG** field, enter the IP address of the primary network interface that will be assigned in the Oracle Advanced Support Gateway Server.
- c. In the **Primary Subnet** field, enter the subnet mask of the primary network interface in the Oracle Advanced Support Gateway Server.
- d. In the **Primary Default Gateway** field, enter the default gateway of the primary network interface in the Oracle Advanced Support Gateway Server.
- e. (Optional) In the **ILOM IP Address** field, enter the IP address that will be assigned to the ILOM Management Interface of the Platinum monitored system of the Gateway.

- f. (Optional) In the **ILOM Subnet** field, enter the subnet mask of the ILOM interface.
- g. (Optional) In the **ILOM Default Gateway** field, enter the default gateway of the ILOM interface. IP validation takes place after you input data and move outside of the text box.
- h. (Optional) In the **Static IP Routes** field, specify static routes that may be needed to send traffic destined for the Gateway out of the ILOM Management Interface of the Platinum monitored system on the Compute Nodes.
This field is not required if the default route on the monitored system is via the Management Interface.
- i. (Optional) In the **HTTPS Proxy Hostname** field, enter the proxy hostname.
This field is required only if the connection from the Oracle Advanced Support Gateway Server to the Internet is via a proxy.
- j. (Optional) In the **HTTPS Proxy Port** field, enter the proxy port.
This field is required only if the connection from the Oracle Advanced Support Gateway Server to the Internet is via a proxy.
- k. (Optional) In the **HTTPS Proxy Port** field, enter the proxy port.
This field is required only if the connection from the Oracle Advanced Support Gateway Server to the Internet is via a proxy.
- l. (Optional) In the **HTTPS Proxy Username** field, enter the user name for the proxy.
This field is required only if the connection from the Oracle Advanced Support Gateway Server to the Internet is via a proxy.
- m. (Optional) In the **HTTPS Proxy Password** field, enter the password associated with the user name for the proxy.
This field is required only if the connection from the Oracle Advanced Support Gateway Server to the Internet is via a proxy.

Note:

3. Click Next.

The **Systems** screen appears.

Figure 2–4 Service Implementation Worksheet: Systems

4. Validate the customer’s credentials, supply notification contacts, and provide information about the customer’s monitored systems:
 - a. In the **Customer Support Identifier (CSI)** field, enter the hardware CSI of the monitored system to be configured for Platinum Services. The CSI can be found on My Oracle Support (MOS).
 - b. In the **Oracle Account Name** field, enter the email address of the customer contact.

Note: The user must have My Oracle Support (MOS) access to the hardware CSI entered above.

- c. In the **Notification Contacts** area, click **Create & Add New Contact** to create a new contact, or click **Add From Contact List** to select an existing contact.

Notification contacts are individuals in your organization that are informed about any planned changes, such as configuration management (adding or removing a database from a monitored state); planned maintenance (alerting Oracle that a machine or database is being brought down), or fault notification.

Notification contacts are added to the “Notification Contact”, “CM E-Mail Subscriber”, “Primary SR customer Contact (Hardware)” and “Platinum Patch Customer Contact” system defined contact list under the **Contracts and Contacts** section of the user interface when the Service Implementation Worksheet is submitted.

Note: You must add at least one Notification contact.

If you select **Create & Add New Contact**, the Add Contact screen appears. See [Figure 2–5](#).

Figure 2–5 Add Contact Screen

Enter the details for the contact: full name, business title, email address, and phone number.

The business title should reflect the role of the user, for example, system administrator, DBA, IT VP.

Click **Add** to confirm the contact details.

If you select **Add From Contact List**, the Select Contacts screen appears. See [Figure 2–6](#).

Figure 2–6 Select Contacts Screen

<input type="checkbox"/>	Username *	Name	Business Title	Email	Phone	Portal User
<input type="checkbox"/>	bogdan.ivan@gmail.com	Bogdan Ivan		bogdan.ivan@gmail.com		
<input type="checkbox"/>	brett.rotan@gmail.com	Brett Rotan	Area Field Eng	brett.rotan@gmail.com		
<input type="checkbox"/>	costi1@mailinator.com	Costi1 Costi1		costi1@mailinator.com		
<input type="checkbox"/>	denis.boule-Simulate-t...	denis.boule-Simulate-testplatinumuat denis.boule-Simulate-testplatinumuat		denis.boule-Simulate-t...		<input checked="" type="checkbox"/>

Select the check boxes corresponding to the required contacts and click **Select** to confirm.

A Portal User as defined in the contact list has access to the Oracle Advanced Support Portal used for Platinum configuration management, incident monitoring and reporting, change management, and so on.

Note: You must add at least one contact.

- d.** In the **Engineered System Information** area, in the **Installation Status** field, select the **Check if already installed** box if the Engineered System is already installed.

If you select the **Check if already installed** box, you are required to complete [step e](#) to [step k](#).

- e.** In the **System Type** field, select the monitored system type to be enabled for Platinum Services.

Note: A Virtual Exalogic monitored system is configured to have the nodes split into multiple instances using Oracle Enterprise Linux 5 or 6.

- f. In the **Rack Serial Number** field, specify the monitored system rack serial number, which can be found on the rear of the monitored system rack.
- g. In the **Host IP Address of 1st Compute Node** field, enter the management IP address of the first compute node.

This is the value obtained by running the `ifconfig eth0` command on the first compute node.

- h. In the **Fully Qualified Hostname** field, enter the fully qualified domain name of the first compute node.

This is the value obtained by running the `hostname` command on the first compute node.

Note: For Exalogic and ZFS Storage Appliance Racked Systems, this option is not required and this field is disabled.

- i. In the **Databases to be Monitored** field, specify the list of databases required to be monitored by Platinum Support Monitoring.

There is no limit to the number of databases Oracle monitors, as long as they run on Platinum Certified levels of the Oracle Database. However, Platinum does have rules regarding the number of databases that can be patched. Refer to your Oracle Platinum Driver for more information.

If the system type is Physical Exalogic, Virtual Exalogic, or ZFS Storage Appliance Racked System, then the **Database to be Monitored** field is disabled/grayed out.

Note: If the rack is a split configuration or multi-rack configuration, please specify that information in the **Comments** field below.

Select **All** to monitor all of your currently running databases.

Select **Custom List** to provide database instances. The **Database List** field expands. Enter a comma-separated list of database instances.

You can find the instance name of the database running on a given node by running the `ps -ef | grep pmon` command.

- j. (Optional) In the **Hardware CSIs to be Consolidated** field, enter the list of CSIs to be consolidated, where the monitored system has hosts associated with multiple hardware CSIs.

Note: All components configured into a single Engineered System instance (expanded system, that is, within a single rack, or multi-rack environments) must be associated with the same Hardware CSI.

Hardware CSI consolidation must take place before Platinum Service configuration for the Engineered System. Customers should contact their Platinum Drivers for more details.

Examples might include upgraded racks where the original rack assets and the upgrade order assets are still on separate hardware CSIs, racks with Storage and Switch Expansion, and multi-racked configurations consisting of two or more physical racks, each entitled to its own hardware CSI.

- k. (Optional) In the **Comments** field, enter any other useful information about the monitored system configuration, for example, whether there are any partners involved in the implementation, or whether the rack is a split configuration or multi-rack configuration.

A sample Engineered System Information configuration is shown in [Figure 2-7](#).

Figure 2-7 Sample Engineered Systems Configuration

Engineered System Information

Installation Status Check if already installed

System Type * Exadata

Rack Serial Number * AK00292118

Host IP of 1st Compute Node * 10.20.154.122

Fully Qualified Host Name * test.oracle.com

Databases to Be Monitored All Custom List

Database List * db1, db2, db3

Hardware CSI's to Be Consolidated * CSI-whatever

Comments This is where all the comments live

5. Click Next.

The **Agent** screen appears.

Figure 2-8 Service Implementation Worksheet Screen 4, Agent

New Worksheet : Agent
Step 4 of 5 to define cloud control agent settings

1 Introduction 2 Overview 3 Systems 4 Agent 5 Confirm

EM Agent Username * orarom

EM Agent ID * 1010

Group Name * orarom

Group ID * 1010

EM Agent User Home * /home/orarom

EM Agent Base Directory * /opt/OracleHomes

Agent Port * 1830

Keep root access of Engineered to Oracle after Platinum Implementation

Configure Agent user with sudo access

6. Provide the cloud control agent settings used by Oracle Enterprise Manager (EM) for the monitored system:

- a. The **EM Agent Username** field displays the user created during installation. This value must be unique to Platinum (and have a maximum length of 8 characters).

The default user name is *orarom*. **This field is read-only.**

- b. In the **EM Agent ID** field, enter the ID to assign to the agent user. The default is *1010*. If the agent user ID is already used, an auto-generated ID will be used.
- c. In the **Group Name** field, enter the Platinum Oracle Enterprise Manager agent user group name.
Oracle recommends using the default, *orarom*.
- d. In the **Group ID** field, enter the Platinum Oracle Enterprise Manager agent user group ID.
Oracle recommends using the default, *1010*.
- e. In the **EM Agent User Home** field, enter the details of the home directory for the Platinum agent user. The default depends on the supported operating system.
For users of the Solaris operating system, prefix the home directory with */export*, for example, */export/home/orarom*.
- f. In the **EM Agent Base Directory** field, enter the details of the base directory for agents installed on the monitored system.
- g. In the **EM Agent Port** field, provide the Agent installation port (in the range 1830-1839).
Note: Oracle reserves port 3872 for the customer's Enterprise Manager agent instance.
- h. In the **Keep root access of Engineered System to Oracle After Platinum Implementation** field, select the check box to specify that Oracle retain root access to the monitored system after Platinum implementation is complete.
- i. In the **Configure EM Agent User with sudo access** field, select the check box to specify that the agent user on the monitored system is configured with sudo access.


7. Click **Next**.

The **Confirmation** screen appears.


The **Confirmation** screen allows you to review a summary of all of the information submitted in the SIW, and requires you to confirm all details.

Part of a sample confirmation screen, showing gateway details is shown in [Figure 2-9](#).

Figure 2–9 Service Implementation Worksheet Process Flow: Screen 5, Confirmation



New Worksheet : Confirmation
Step 5 of 5 to confirm all information before submission



Gateway

Gateway Type :


NEW

Gateway Name :

Gateway Name will be generated after worksheet completed

Location Address :

15600 S Central Expy,Dallas,TEXAS,United States of America,75204



Gateway Contact


Contact :

First name	Last name	Email	Phone
Brian		brian@gmail.com	

8. Click Complete.

The **All Done** screen appears.

Figure 2–10 Service Implementation Worksheet Screen, All Done



New Worksheet: All Done!
Your worksheet has been submitted. Below is the summary of your worksheet


1
Instructions

2
Gateway

3
Systems

4
Agent

5
Confirm



Congratulations!

Gateway "ct-impusl11-5" has been created successfully

Activation code: **NqO-Qvq2**

You will use the activation code to connect the gateway to Oracle once it is installed on your premises


[View Completed Worksheets](#)

Gateway Type

New

Gateway Name

www-10.222.345.oracle.com



Gateway Location

Location Address

200 Main Street, Suite 100
San Jose, CA 95124 USA

The **All Done** screen allows you to view the completed worksheet, and provides an activation code to activate the Gateway, if required.

See "[About Activation Codes](#)" for more information about activation codes.

Related Topics

[About the Service Implementation Worksheet Customer Invitation](#)

[About the Service Implementation Worksheet Wizard Screens](#)