Creating & Managing Support Identifier Groups (SIGs)

Key Benefits

SIGs allow Customer User Administrators (CUAs) to manage SIs in a way that makes sense for their business. The feature allows for the creation or consolidation of SIs, and the addition or removal of users and assets as required.

A new or an existing SI can be used as an SI Group to organize assets and users, thus providing clearer Service Request reporting for:

- Critical systems
- Project tracking
- Controlling user access & secure systems
- Locations or functions
- Environments

Note that there are some restrictions with the use of Support Identifier Groups. Please refer to Just the Facts - Restrictions.

Who Can Create and Manage SIGs?

All CUAs can create and manage SI Groups, by accessing Administration > Support Identifiers.

- ✓ Create the SIG
- ✓ Add Users
- ✓ Add Assets

For additional information, refer to document 1569482.2 and review the Just the Facts screenshots and step by step instructions or watch the video training available in the Just the Facts section.

Support Identifiers

Here you can create and manage Support Identifiers, add an

⚠ Restrictions apply to assets with Platinum service. Confi

| Support Identifiers | Default Support Identifiers |

View ▾   New...

| Name | * Support SI# | Description |

First SG Created   12345878   Sleepycat Demonstrat

Important note: SIs are managed via the MOS user profile > My Account > Administrative> Support Identifiers as shown in the above screenshot.

When there are multiple CUAs for one SI, it is recommended that CUAs work together to manage SI groups. These are displayed in the Support Identifiers section.

Create a New SI Group

1. Click on the 'New' button on the Support Identifiers page.
2. Select the purpose, the appropriate Organization/ Account (legal entity) to associate with the new SI.
   Note: The PURPOSE field is presented when the CUA has Direct and Partner SIs.
3. Name the new SI, using up to 30 characters.
4. Set & check User Access Defaults.
5. Complete the optional Description field.
6. Click on Create.
7. It may be easier to duplicate an SI and add/remove assets and/or users rather than start from scratch. There is an option to **Duplicate an SI** in the Edit SI screen.
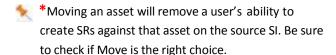
Add and Remove Users

1. Select the SI row for editing and click the SI number (for example 12348765 in screenshot above).
2. To add users, click Add in the Users area, then search for user(s), and click Add Users. The CUA user view is limited to users associated to the SIs the CUA administers.
3. To remove a user, go to the Users area, click to select user(s) (use the Ctrl key to select multiple

users), and click Remove.

Add, Copy and Move Assets

1. Select the SI row for editing and click the SI number (for example 12345678 in screenshot).
2. Click **Add** in the Assets areas (Hardware and Software) then search for assets from the SI list (limited to the same account/organization) and select the assets to move or copy.
3. Expand the asset details of an SI by clicking on the triangle beside the SI number. Note that as an asset is selected, the Copy and Move buttons have a counter to record the total assets selected.
4. For hardware assets, there is an option to '**Add assets in batch mode**', this requires a list of serial numbers, and is the fast way to add many hardware assets.
5. Select **Copy Assets** or **Move Assets**; a suggestion is to use Copy if unsure because assets can be removed from the source SI at a later time.
6. **COPY Assets**, this option will display a pop-up, 'Retain Assets in Source Support Identifier' to inform the CUA that they have chosen to Copy the Assets**.**
7. **MOVE Assets,** the assets are moved from one SI to another***.**
8. **Close** the pop-up, and the assets will be displayed on the screen associated to the SI.

*Moving an asset will remove a user's ability to create SRs against that asset on the source SI. Be sure to check if Move is the right choice.

Editing the SI Group Name, Description and Access Defaults

1. Select the SI row for editing and click the SI number (for example 12345678 in screenshot).
2. The SI Group name may be edited. When the SI Group name appears as a number, this field may

also be edited. Access defaults for new users can also be changed.

3.   After making a change, click Save.

Managing Critical Systems and Program Milestones within SI Groups

Customers can leverage SI Group functionality to manage their Critical Systems and track key Program Milestones. These tracking fields can be added to Support Identifiers by CUAs with the SI Group privilege. This information assists Oracle Support Engineers in understanding their customers' needs. Here is how to get started:

1.   Set Critical system flag and Milestone details as required when creating or updating an SI.

📌 **NOTE: All SRs related to a flagged Critical System should be logged using this SI.**

Default SI Groups

This is the Support Identifier that is chosen to automatically house of all new assets from new orders for the CUA's Account/Organization.

This eliminates the need to manage the additional accumulating SIs from each new order, which is something that some customers find very useful.

Be aware, a Default SI applies to all assets from all new orders placed within the same organization name.

Before setting Default SIGs, consider if this is suitable for your organization. Consider if there are other users or CUAs who place orders using the same account/organization that may be affected.

To use new Support Identifier Groups as defaults, create these before setting the default.

📌 Note that using a Default SI group means the system automatically moves (does not copy) the assets, therefore the original SI will not work in MOS.

Establishing a Default SI Group

1.   Navigate to the '**Default Support Identifiers**' tab.
2.   Select a Default SI for the Account/Organization and Save.
3.   To disable default SIG, select 'Not Defined' and click Save.

📌   Two distinct default SIs can be selected, one for hardware assets, and another for software assets.

Can SI Groups Be Undone Once Created?

It's important to note that there is no systematic ability to automatically roll back changes made to an SI Group. Changes to assets can be rolled back manually by the CUA. Once created, a new SI Group cannot be deleted; it can be hidden when all assets are removed.

SI Group Limitations

Yes, there are restrictions to moving or copying assets when they are associated with other types of services such as Oracle Cloud subscriptions, or Advanced Customer Support Services (including but not limited to Solution Support Center and Priority Services).

Assets can only be moved or copied between SI Groups of the same organization/ account legal entity. Assets cannot be moved or copied when they are associated to different legal entities.

To avoid disruption of Platinum Service, do not use SI Groups features on assets covered by Platinum Service.

HELP - **For more information about Support Identifier Groups, refer to the My Oracle Support knowledge document 1569482.2 titled 'My Oracle Support How to Create and Manage Support Identifier Groups'.**

If you are new to the My Oracle Support Customer Administrator Role, take time to review the roles and responsibilities in document 1544004.2.