Schedule an Expert Workflow

Support Engineer maintains SaE assignment in BCP & availability in RCC

Customer books SaE session

Automatic: Create a Case in ServiceNow

Automatic: Assign engineer based on RCC availability

Support engineer notified via email

Analyze customer's request, validate completeness

Belongs to your SaE area?

No → Handover/ Cancel by SAP

Yes

Generate Skype meeting URL

Prepare for SaE session

Deliver SaE session

Issue resolved?

No → Summarize and process Case as standard

Yes → Summarize & close with Resolution

INTERNAL

WORK INSTRUCTIONS, PROCESSES, SYSTEMS

Receive SaE session booking notification

You will receive an email notification with the following details when booked for a SaE session:

- SaE Case Number (Appointment ID)
- Date & Time (with time zone) of the SaE slot
- SaE Expert Area
- SaE Session Description (free text) as mentioned by customer when booking
- the session
- An .ics file which is to be added to your Outlook calendar

Notes ⚠

The Skype meeting URL needs to be generated manually by the SaE Engineer at the moment. As soon as you receive the notification e-mail about the SaE booking, follow instructions here to generate the Skype meeting URL without any delay.

After generating the Skype meeting URL, it is mandatory to add the .ics file to your calendar. In case of ServiceNow outages, still the SaE session can be delivered.

Screenshot of SaE email notification

Schedule an Expert Appointment Information

Your appointment: 12.12.2017 10:30 CET

Dear Sissi Elisabeth Prokesch,

Your Schedule an Expert appointment has been **created**. To view the appointment please click the button below.

Your Appointment

Sincerely,
SAP Support

Details about your Schedule an Expert appointment	
Subject	test
Appointment Date & Time	12.12.2017 10:30 CET
Skype for Business Meeting Link	The SAP Support Engineer will provide you with the Link prior to the meeting
Appointment ID	113078/2017
Expert Area	SAP BusinessObjects - Platform Infrastructure

Need help?	
KBA for Schedule an Expert	KBA 2482688
Need more Information on using the Skype for Business Web App?	Click here
Not able to install Skype for Business Web App? No Problem, you can attend your appointment by telephone	Find local number
Telephone Conference ID:	-

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SaE session Appointment

The submission of the Schedule an Expert session triggered a Case in Service Now. The case is routed automatically to an engineer based on the component and based on the engineer's availability, accordingly to the settings maintained in BCP and RCC. More information here. The Case is created based on the information the customer provided as well as some information the system generated.

When the case is created, the system also generates an Appointment for the particular SaE session. Some values are pre-filled automatically with the information previously provided, such as the time slots.

To find the new SaE case and its appointment:

Service Now ➡️ **List** ➡️ **My Cases / My Open** ➡️ **Appointments**
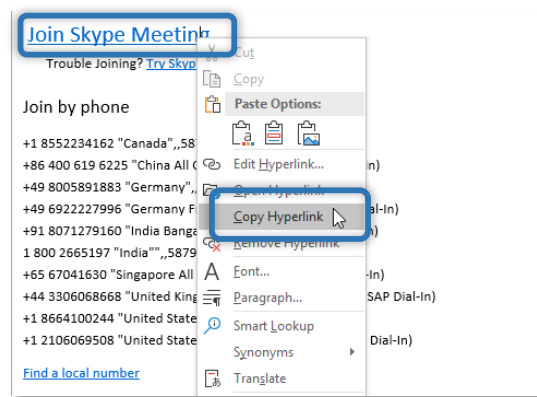
Generate Skype Meeting URL

Use the following steps to generate a Skype meeting URL as soon as you receive the notification of customer booking the SaE session:
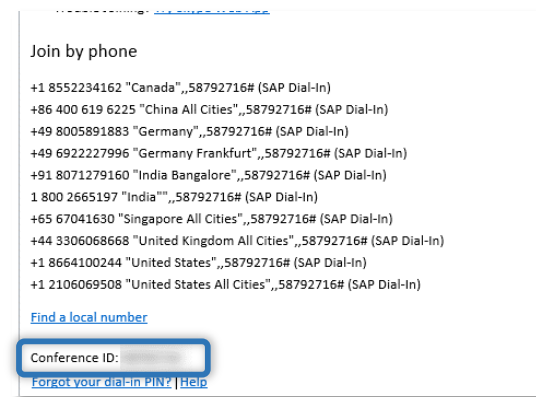

Step 1

In Outlook, go to Calendar > New Skype Meeting > Meeting Options

Step 2

1. In the window Skype Meeting Options, choose the radio button *A new meeting space (I control permissions)*

2. Under *Who's the presenter?* Select *Anyone (no restrictions)*

Step 3

Copy the URL generated in the hyperlink *Join Skype Meeting* (right-click where hovering the mouse pointer on the hyperlink > select *Copy Hyperlink*)

Step 4

Copy the unique *Conference ID*

Step 5

1. Enter the URL and Conference ID in the SaE Case, in the field *SAE Session* and *SAE Conference ID* under the *Appointment* screen.

2. Save the Case.

Once you save the Case, then the meeting link should be displayed in the Launchpad. (It may take some time to update).

Notes ⚠️

Information for customers when using Skype meeting:
https://support.office.com/en-gb/article/Join-a-Skype-Meeting-with-Skype-forBusiness-Web-App-4828ad18-ed21-422a-a870-94d676d4b72a

Prepare for delivering SaE session

Based on the details provided by the customer in the SaE appointment, validate if you have all the information and tools at hand to deliver the SaE session.

Confirm if you need to do one or more of the following actions before the actual SaE session delivery:

1. Validate if all the information is available for you to deliver the SaE session. If not, call the customer to gather all the necessary information:

    a) If customer is not reachable via phone, you can gather information via *External Info* via the SaE Case to make customer aware that you need to reach him and the reason.

    b) If the customer does not respond to the SaE case, you must still continue with the SaE session!

    c) The above guideline to continue with the SaE session also applies if the customer does not provide additional information you may have requested. In this case too, proceed with delivering the SaE session, making a best effort with the available context.

    d) Continue the conversation about the request with customer within the case if necessary.

2. Gather links to self-help resources – KBAs, Community, Product documentation, etc.

3. Confirm that the information provided by customer matches the component chosen for booking SaE session.

4. Check if EUDP Regulations apply and if these may hamper the delivery of SaE session.

5. Record key points for reference in an *Internal Info* in SaE Case.
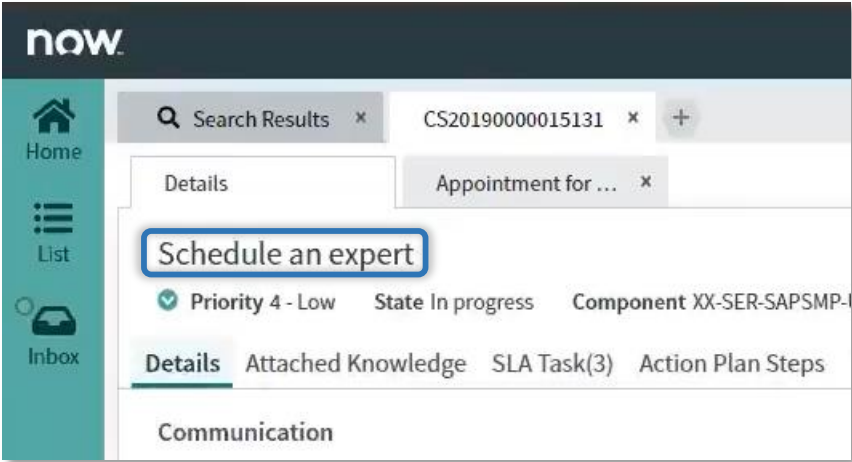
BEST PRACTICE:
Call to confirm the customer has received the Skype meeting URL and is aware of the session, clarify his/her request if the information provided during booking is ambiguous. This is a good opportunity to set expectations for the customer so that he can be prepared and knows what is going to happen in the SaE session.

Notes ⚠️

If the SaE session is assigned incorrectly, refer guideline here.

Deliver SaE session

Logon to the Skype Meeting Room at least 5 minutes before the scheduled start of the session.

Deliver session as soon as the customer joins the meeting.

Adhere to the standard WIPS guideline for following:

System Access & Log-on Data

Security Rules

EUDP Regulations

Consulting Requests

Keep a conscious watch on the time remaining – at the end of 25 minutes, confirm with the customer that you are on-track to complete the session in the scheduled 30 minutes. If you think there is added value to extend the session to .e.g. discuss more details or collecting more information about the scenario, communicate to the customer that the session can be extended with additional max. 30 minutes.

When ending the meeting, inform customer that you will update a summary of this meeting and Resolve the SaE Case.

Notes ⚠️

Refer to guideline on handling exceptional situations when delivering the sessions - here.

Close SaE session

Where all questions answered in session and does customer agree to close?

YES:

Document the summary of the SaE session in a External Info after you have ended the Skype Meeting and Resolve the Case.

NO:

If the session needs to be continued and worked as normal, summarize the session and outline key topics covered. Change the Current Channel to Case. More details [here](#).

When updating the Case:
- Ensure it is assigned to the correct component.
- Attach KBAs which are relevant in the context of the session.
- Summarize open actions, if any, for SAP Product Support.
- If the case needs further analysis in Product Support, summarize your findings and assign case to the correct queue.

If you have promised to provide the customer with additional documentation,

follow the standard WIPS guideline on [Exchanging Files with Customers](#).

> **Notes** ⚠️
>
> These steps must be performed the same day as the delivery of the SaE session.

Close SaE session

- Schedule an Expert is offered only in English.
- However, engineers are able to converse in the local language of customer if they have the appropriate skills.
- Any summary of the SaE session documented in the incident must be English.
- If engineer is not able to converse in customer's local language:
  - Request the customer to switch to English.
  - If the customer is not able to converse in English:
    - Inform customer that SaE is currently offered only in EN and that the SaE case will be transferred to the regular case processing queue for processing as a regular case.
  - Update the field Current Channel = Case in the Details section (more detail [here](#))
  - Transfer Case into normal case queue and trigger Translation workflow as per WIPS process [Verify Language](#) if needed.

Guidance for Remote Connection to customer systems

Standard WIPS Guidance applies for the following:

- Obtaining remote connection user ID and password.
- Starting a remote connection via STFK.
- Screen sharing.
- GoTo Assist screen sharing.

For more details, please refer to Remote Support WIPS or the Schedule an Expert FAQ document.

Change Log

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Ramon Gupta	May 9 2017	▪ Initial document	Released
1.0.1	Christine Fikany	Jun 8, 2017	▪ Added "Attach KBA 2484024 – Schedule an Expert session has been delivered to the incident…" ▪ Modified Step 2 – "If SaE is not offered in the component chosen or if you are unable to get an expert on this component" by adding sub steps 3-6	Released
1.0.2	Christine Fikany	Aug 10, 2017	▪ Slide 3 – added a screen shot for accessing RCC settings ▪ Separated slide 10 into two slides for managing unforeseen events. Added handling sick days and customer requests increase in priority to this slide ▪ Added new slide 21 – SaE session needs to be cancelled. Removed cancellation process from slide 19. ▪ Modified reschedule process in slide 20 by removing the comment "send the customer some open times you see in the SaE scheduling option…" ▪ Modified slide 14 to reflect new cancellation process. ▪ Added slide 23 for handling sick days. ▪ Added slide 24 for customer requests increase in priority of session	Released
1.1.0	Christine Fikany	Sep 29, 2017	▪ New "Process Overview" slide Sequence	Released
1.1.1	Christine Fikany	Oct 27, 2017	▪ Slide 4 – modified step 1 to include confirming with customer Skype meeting invite has been received ▪ Slide 6 – removed the step to attach a KBA once session has been completed	Released
1.1.2	Christine Fikany	Dec 11, 2017	▪ Slide 6 – Added comment to put incident in "solution provided" the same day session is completed if all questions are answered.	Released
1.1.3	Christine Fikany	Jan 22, 2018	▪ Slide 3 – deleted step 3 "Save the calendar appointment"	Released
1.1.4	Christine Osborn	Mar 13, 2018	▪ Slide 1 – Added step for "Generate Skype URL" ▪ Slide 2 – screen shot modified with updated version ▪ Slide 3 – Updated screen shot and added step 3 to "Anyone (no restrictions)" for presenter ▪ Slide 4 – restructured slide but content remained the same ▪ Slide 8 – updated SaE Remote support FAQ link	Released
1.1.5	Laszlo Dobos	Jun 18, 2018	▪ Slide 2 – Modified wording in „Please note" box: updated how to generate Skype URL ▪ Slide 3 – Updated how to generate Skype URL	Released
1.1.6	Laszlo Dobos	Sep 11, 2018	▪ Slide 4 – extended steps in „Prepare for delivering SaE session " ▪ Slide 5 – Extended „Deliver SaE session" with the possiblity of extending the session based on engineer judgement	Released
1.1.7	Laszlo Dobos	13 May, 2019	▪ Slide 2 – Mandatory step: saving .ics file from e-mail notification once it contains Skype URL to ensure business continuity	Released
2.0.0	Leonardo Reginato	Sep 24, 2019	▪ Initial document incorporating Service Now	Draft