

# Assign a Case

At A Glance

## Case Management Process



### Purpose

A Case is assigned to the appropriate Support Engineer based on the skillsets and resource capability to make sure that the issue is taken care of as soon as possible.

### Best practice for manually assigning a Case – Next Action Monitor

Sort the column **Next Action Due** in the [Next Action Monitor list](#) in descending order when monitoring the list and pick up the first Case.

This helps ensure that Cases requiring immediate actions due to SLA fulfillment can be taken care of first.

### 1. Assign a Case

#### Option A: Assign a Case to yourself

- 1a Monitor the Case list for unassigned Case
- 1b Assign the selected Case to yourself

#### Option B: Assign a Case to another Support Engineer

- 1a Monitor the Case list for unassigned Case
- 1b Manually assign the Case to the appropriate Support Engineer

#### Manual Assignment

#### Option C: System automatically assigns a Case via Advanced Work Assignment (AWA)

Advanced Work Assignment (AWA) automatically assigns the Cases to qualified Support Engineers based on their availability, capacity, and skills. The assigned cases can be seen in Support Engineers' Agent Workspace inbox.

Follow the steps [here](#) to set up your skills and capacity.

#### Automatic Assignment

### Notes

- The Support Engineer is responsible to fulfill the SLA on ALL levels whenever he takes over the Case
- IRT is only fulfilled after the first qualified response is sent to the Customer via **External Info** in the Case
- Queue Manager needs to ensure the adherence to ORT and the processor (Support Engineer, Developer, or Operator) is responsible to fulfill the ORT



# 1. Assign a Case

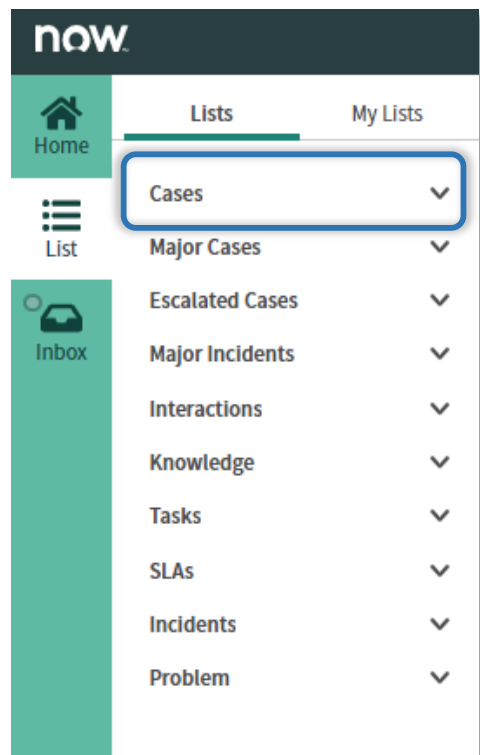
## Case Management

### Option A: Assign a Case to yourself

1a Monitor the Case list for unassigned Case

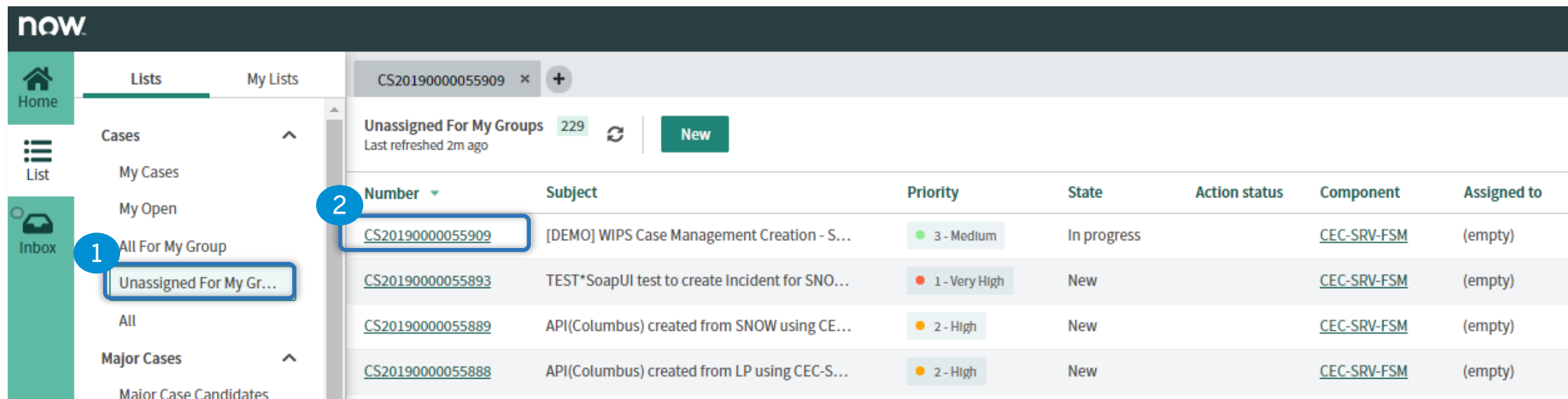
#### Step 1

Open **List view** and click **Case** Module.



#### Step 2

Click **Unassigned For My Groups** in the list to view all Cases that have not been assigned to any Support Engineer.  
Then click the Case **Number** to open the Case record.



#### Notes



The Support Engineer can also go to **Next Action Monitor** saved under **My List** to see all prefiltered Cases that need to be assigned based on specific conditions. Click [here](#) to see how to set up a monitor.

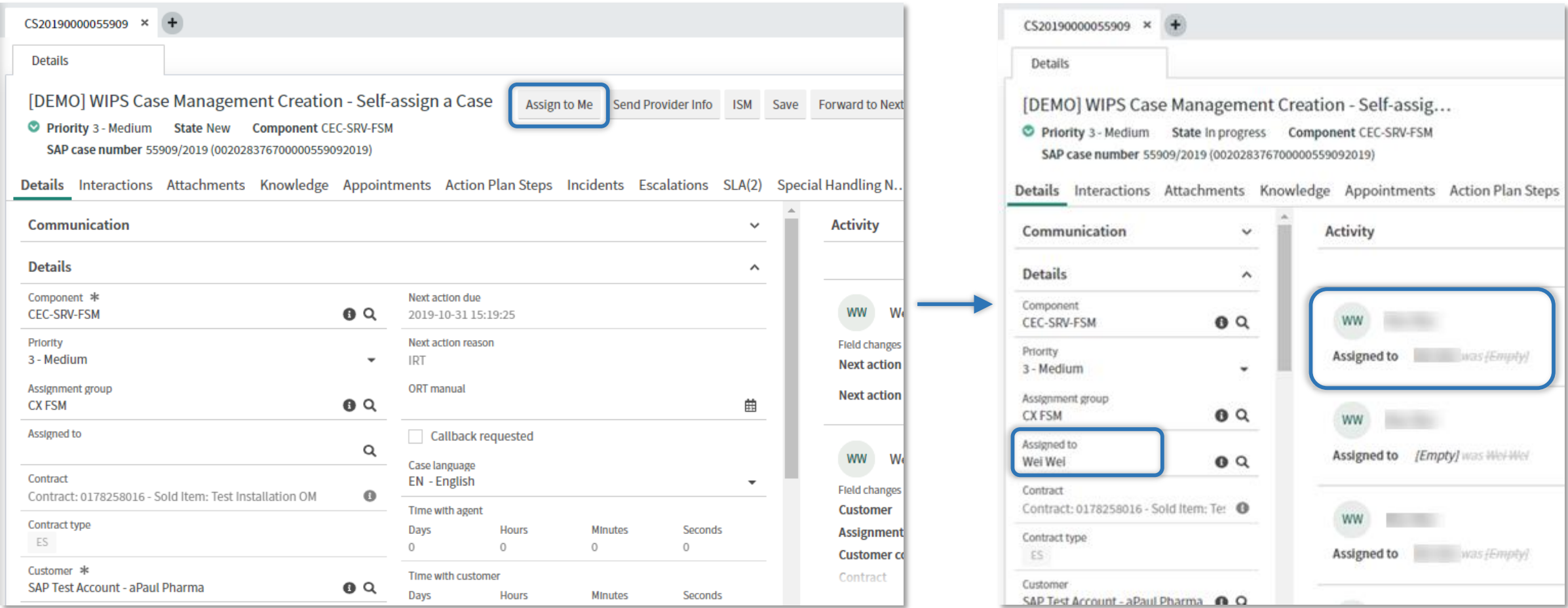
Option A: Assign a Case to yourself

1b Assign the selected Case to yourself

Step 1

Click **Assign to Me**. Now the Case is assigned to yourself. This activity is documented down in the Activity stream.

To unassign the Case, delete the name shown in the **Assigned to** field and the click **Save** to update the record.

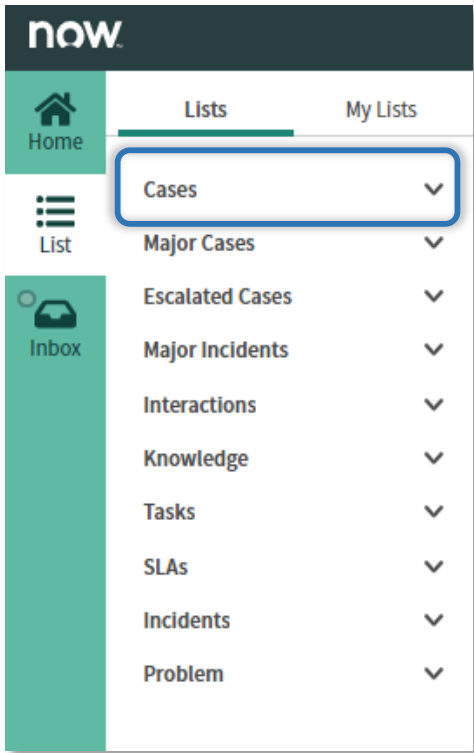


Option B: Assign a Case to another Support Engineer

1a Monitor the Case list for unassigned Case

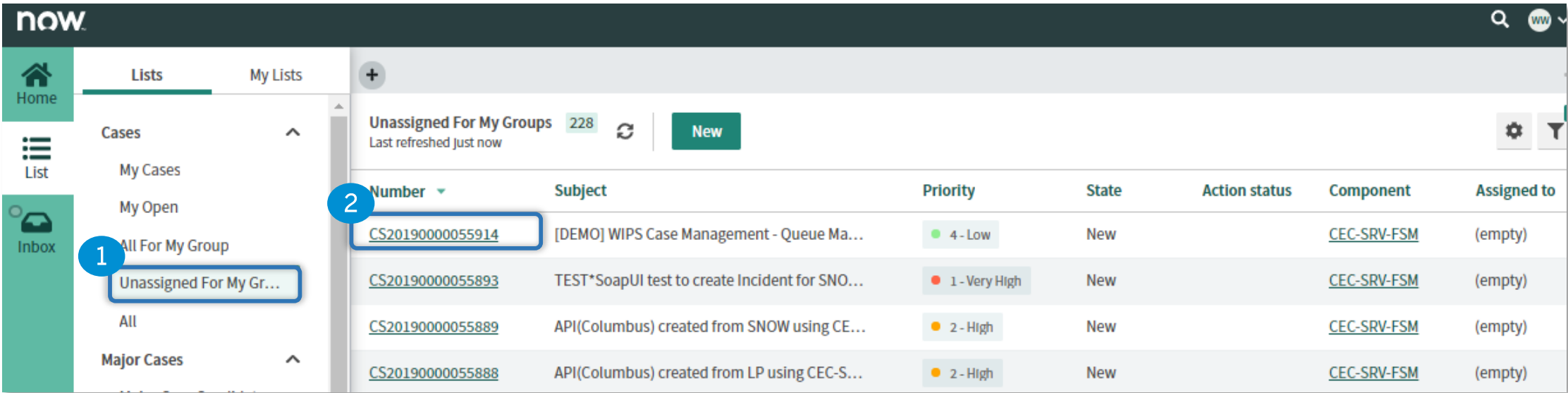
Step 1

Open **List view** and click **Case** Module.



Step 2

Click **Unassigned For My Groups** in the list to view all Cases that have not been assigned to any Support Engineer.  
Then click the Case **Number** to open the Case record.



Notes

The Support Engineer can also go to **Next Action Monitor** saved under **My List** to see all prefiltered Cases that need to be assigned based on specific conditions. Click [here](#) to see how to set up a monitor.

# 1. Assign a Case

## Case Management

### Option B: Assign a Case to another Support Engineer

1b Manually assign the Case to the appropriate Support Engineer

#### Step 1

Add the Support Engineer to the field **Assigned to** and then click **Save** to update the record. This activity is documented down in the Activity stream.

To unassign the Case, delete the name shown in the **Assigned to** field and the click **Save** to update the record.

Notes

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Best Practice for Assigning a Case

- Send ONE email for ONE Case and ask the Support Engineer in person or via Lync/Skype to help
- Notify the Support Engineers that are readily available based on RCC and OSD settings
- Check whether the Case is already blocked before sending notification email

CS20190000055914

Details

[DEMO] WIPS Case Management - Queue Manager as...

Assign to Me Send Provider Info ISM Save

Priority 4 - Low State New Component CEC-SRV-FSM  
SAP case number 55914/2019 (002028376700000559142019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents Escalations SLA(2) more

Communication

Details

Component \*  
CEC-SRV-FSM

Priority  
4 - Low

Assignment group  
CX FSM

Assigned to  
Blanca

Showing 1-1 of 1

1031045 +34 661815664 Services null

Next action due  
2019-11-06 15:52:08

Next action reason  
IRT

ORT manual

☐ Callback requested

Case language  
EN - English

Time with agent  
Days 0 Hours 0 Minutes 3 Seconds 58

Time with customer  
Days 0 Hours 0 Minutes 0 Seconds 0

Action plan template

Customer \*  
SAP Test Account - aPaul Pharma

Customer contact  
Alexandra Paul

Activity

Field changes - 2019-10-28 15:52:09

Next action due 2019-11-06 15:52:08

Next action reason IRT was {Empty}

Field changes - 2019-10-28 15:52:08

Customer SAP Test Account - aPaul Pharma

Assignment group CX FSM

Customer contact Alexandra Paul

Contract

Show More

- Queue Manager as...

Assign to Me Send Provider Info ISM Save

ent CEC-SRV-FSM  
'00000559142019)

nowledge Appointments Action Plan Steps Incidents Escalations SLA(2) more

Activity

Field changes - 2019-10-28 16:01:01

Assigned to

Login details https://launchpad.support.sap.com/#/seca/000000000800093678/0020283767000hash=07B31FFB95CC78D32A9026EAB1F971F59EAB9FF5DD39E7A0414E5487D55Fc[Empty] was https://http.wdf.sap.com/Sap/support/fe-bsp/start-sfksap?installationNo=0020082420&systemNo=000000000800093678&messageNo=00200

Remote connection

Field changes - 2019-10-28 15:52:09

Next action due 2019-11-06 15:52:08 was {Empty}

Next action reason IRT was {Empty}

Field changes - 2019-10-28 15:52:09

Next action due 2019-11-06 15:52:08 was {Empty}

Next action reason IRT was {Empty}

Field changes - 2019-10-28 15:52:08

Customer SAP Test Account - aPaul Pharma was {Empty}

Assignment group CX FSM was {Empty}

Customer contact [Empty] it was {Empty}

Contract Contract: 0178258016 - Sold Item: Test Installation OM was {Empty}

Show More

# 1. Assign a Case


## Case Management

### Monitoring P1 and SLA Relevant Cases

Hint: How to create Next Action Monitor in NOW?

1. Go to **All Cases** list to see all Problems assigned to your group.
2. Click the **filter** icon on the top right corner to open the filter.
3. Click **Advanced view** to open the criteria setting.
4. Create the condition list for the monitor based on your specific criteria.
5. Click **Update**. The list will be filtered based on the defined conditions.

Notes



The filter shown in the screenshot is only an example for filtering P1 Cases. Click [here](#) to see more examples of frequently used filtering conditions.

Home

Lists

My Lists

Cases

My Cases

My Open

All For My Group

Unassigned For My Gr...

All

Major Cases

Major Case Candidates

My Major Cases

My Open

Unassigned For My Gr...

All For My Group

All

Escalated Cases

My Escalated Cases

My Open

Unassigned For My Gr...

All For My Group

All

Major Incidents

My Major Incidents

My Open

Unassigned For My Gr...

CS20190000056189 x CS20190000055944 x +

All 20884 Last refreshed 11m ago New

Number	Subject	Priority	State	Action status	Component
CS20190000056234	test Marton	3 - Medium	New		LOD-SF-RCM
CS20190000056233	subject	4 - Low	In progress		LOD-SF-ANA
CS20190000056232	Creating a Case from an interaction in UI16	4 - Low	New		LOD-SF-ANA
CS20190000056228	TEST*SoapUI test to create Incident for SNO...	1 - Very High	New		CEC-SRV-FSM

Showing 1-20 of 20884

Advanced view

All of these conditions must be met

Component

is

CEC

OR

AND

Priority

is

1 - Very High

OR

AND

and

State

is

New

OR

AND

State

is

In progress

OR

AND

or

New Criteria

Cancel

Update

Filters

No filters applied

Restore defaults

Advanced view



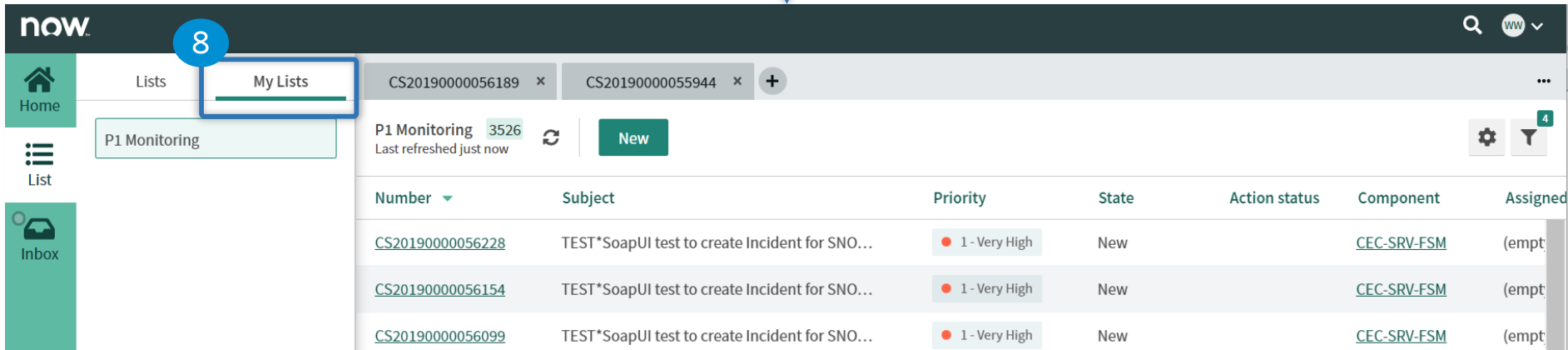
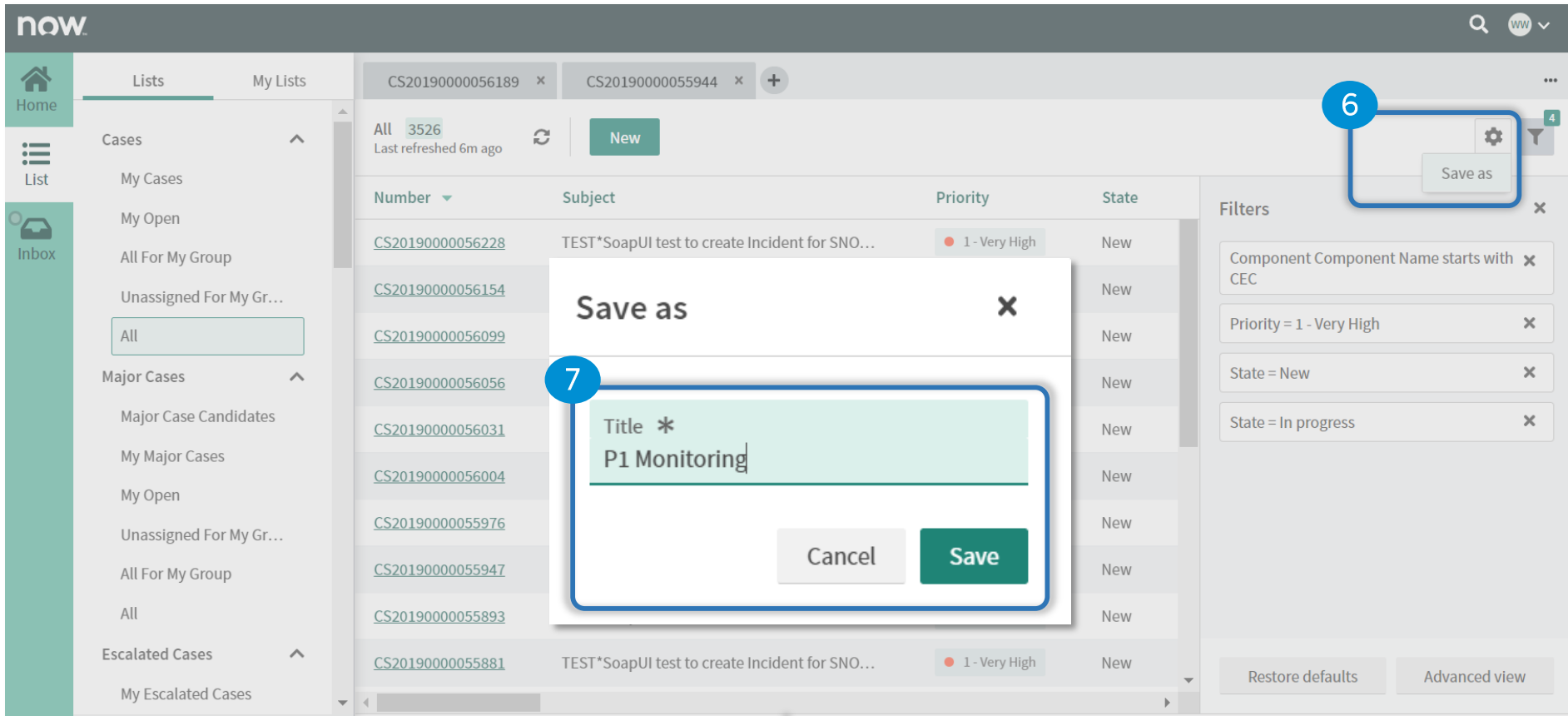
# 1. Assign a Case

## Case Management

### Monitoring P1 and SLA Relevant Cases

Hint: How to create Next Action Monitor in NOW?

- 6. To save this filtered list for future monitoring, click the **settings** icon and then click **Save as**.
- 7. Enter the name of the list in the pop-up window and click **Save**.
- 8. The saved list will be displayed under **My Lists**.



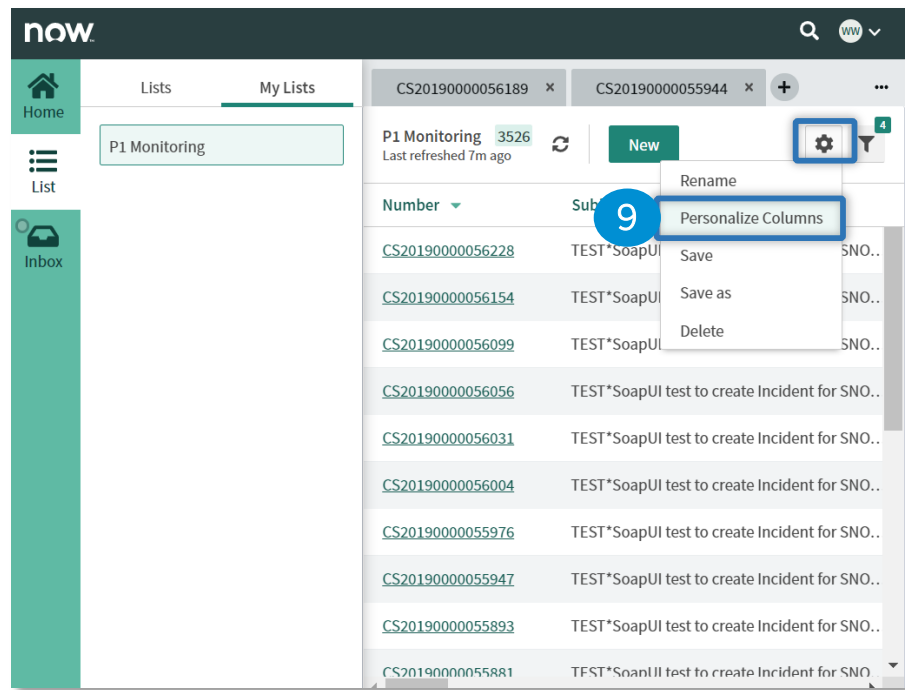
# 1. Assign a Case

## Case Management

### Monitoring P1 and SLA Relevant Cases

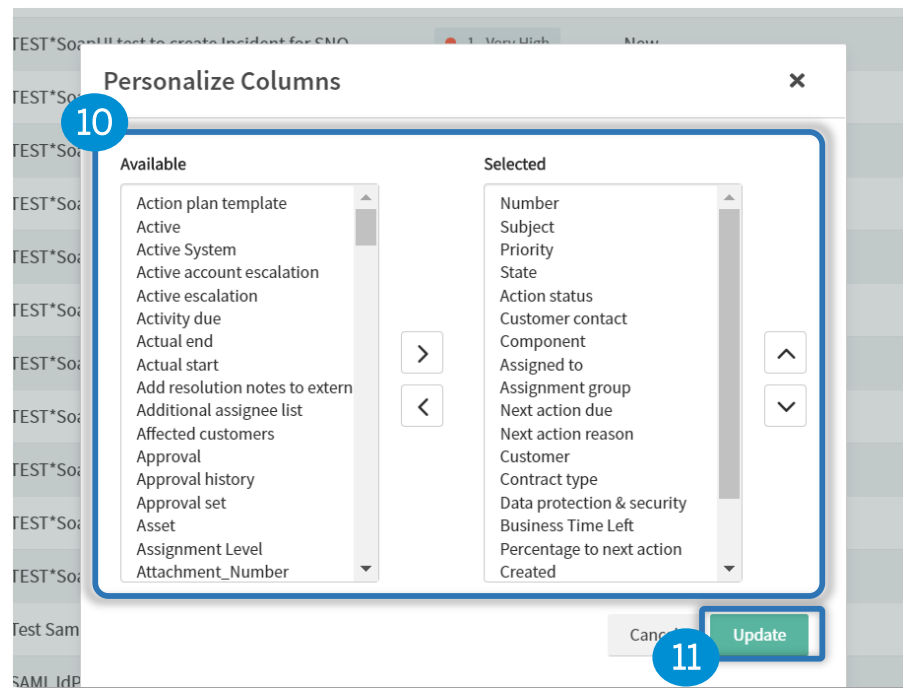
**Hint: How to create Next Action Monitor in NOW?**

9. Select the newly created list, click the **settings** icon and then click **Personalize Columns**.



10. Select all necessary fields to be displayed in the list and move up or down the columns according to your needs.

11. Click **Update** to update the list.



12. Sort the **Next Action Due** in **descending** order. Click the **settings** icon again and then click **Save** to update the list.





# 1. Assign a Case

## Case Management

### Monitoring P1 and SLA Relevant Cases

Hint: How to create Next Action Monitor in NOW?

#### Frequently used example for monitoring P1 Cases

Advanced view

All of these conditions must be met

AND

Component

starts with

CEC

⊖

OR

AND

Priority

is

1 - Very High

⊖

OR

AND

and

OR

State

is

New

⊖

OR

AND

State

is

In progress

⊖

OR

AND

#### Frequently used example for monitoring SLA relevant Cases

Advanced view

All of these conditions must be met

Component

starts with

CEC

⊖

OR

AND

and

OR

Next action reason

is

IRT

⊖

OR

AND

Next action reason

is

ORT

⊖

OR

AND

Next action reason

is

APT

⊖

OR

AND

and

OR

State

is

New

⊖

OR

AND

State

is

In progress

⊖

OR

AND

What is a change log?

What you are reading is official SAP process documentation. Stringent version control is required for Compliance purposes. Thus, this **change log** is a record of who made what changes to this content & when, in case further follow up is needed.

Please send any questions or concerns to

Blanca Serrano, Madrid

Process Manager

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Melinda Ludanyi	June 21, 2019	<ul style="list-style-type: none"><li>WIPS 4.0 initial document</li></ul>	Draft
2.0.0	Wei Wei	Nov 18, 2019	<ul style="list-style-type: none"><li>WIPS 4.0 Golden Standard baseline document</li></ul>	Released