

Investigate and Diagnose the Issue

At A Glance

Case Management Process



Purpose

The Support Engineer investigates the issue reported in the Case in order to determine the best course for correction and resolution.
The Support Engineer may also involve additional expertise to help diagnose the issue if necessary.

Notes

The methods described below can be performed at any point of time. The Support Engineer should prioritize the sequence and choose the applicable methods according to the need of the Case.

1. Explore Knowledge Sources

Option A: Search within NOW Agent Intelligence system for all records with similar issues

- 1a Open Agent Intelligence in the Case record
- 1b Review recommended NOW records based on current Case's subject
- 1c Adjust search terms if necessary

Option B: Search using xSearch and/or ISM across various repositories for knowledge articles and records

- 1a Open xSearch in the Case record
- 1b Review recommended NOW records based on current Case's subject
- 1c Adjust search terms if necessary
- 1d View full article
- 1e Add article in the Case record

2. Access Customer System (if necessary)

Issue relates to Cloud product

- 2a Access the Cloud Access Manager (CAM) through the link provided in Case and request for access
- 2b Click Remote Connection to access to customer's system
- 2c Click Launch Remote connection
- 2d Or perform investigation direct in the Cloud Access Manager system (CAM)

Notes

When exploring knowledge sources for a solution, a permanent solution may not be found. If a workaround solution is found to restore service to the customer, send the workaround solution, as a resolution to the customer in resolve and recover step for acceptance. An incident or problem record should be opened for a solution and related to the case record.

3. Create Action Plan Steps (if necessary)

Option A: Create Action Plan Steps manually

- 3a Create new Action Plan Step
- 3b Fill in all relevant information
- 3c Save the Action Plan Step
- 3d Repeat the steps to capture all actions required

Option B: Create Action Plan Steps using existing Action Plan template

- 3a Select the applicable Action Plan template from the predefined list

4. Involve Additional Expertise (if necessary)

Option A: The next processing level works in the Case and communicates with the customer

- 4a Click Forward to Next Level

Option B: The next processing level does NOT work in the Case nor communicate with the customer

- 4a Create Incident or Problem record
- 4b Fill in all relevant information in the new record
- 4c Save the record
- 4d Continue working in the Case

5. Bundle Case to a Major Case (if necessary)

Scenario A: Create a Major Case to bundle Cases

Scenario B: Bundling a Case to an existing Major Case

1.Explore Knowledge Sources

Case Management

Option A: Search within NOW Agent Intelligence system for all records with similar issue

1a Open Agent Intelligence in the Case record

Click in Agent Assistant icon.

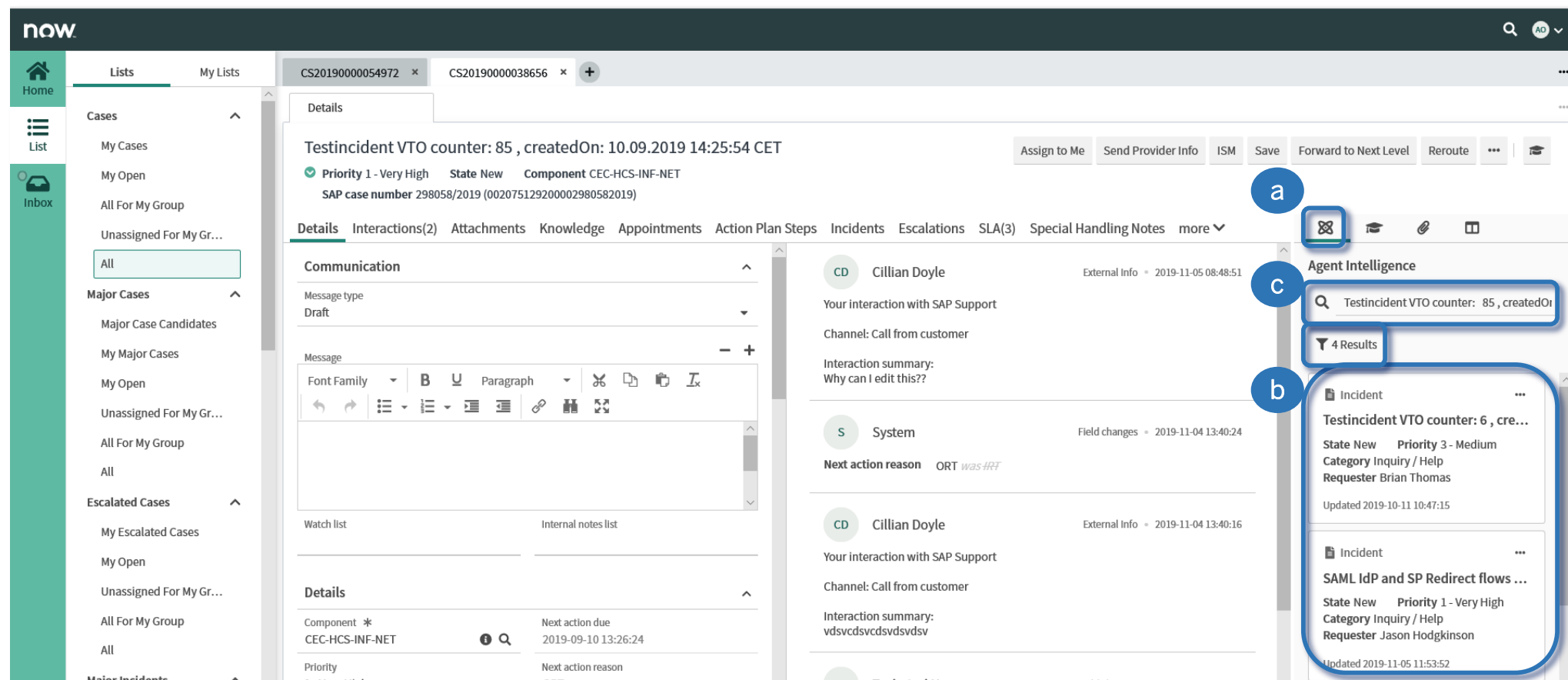
Search results automatically display based on the Case initial description.

1b Review recommended NOW records based on current Case's subject

Identifying how similar situations has been resolved, may bring insights to solve a Case.

1c Adjust search terms if necessary

If no relevant search results are returned, try removing or expanding the component filter or adjusting the keywords in the search bar.



Notes

Agent Intelligence
Search results returned similar Case, Incident and Problem records.

When launched from within a Case, the description from the case is populated as the search terms and component filter.

1. Explore Knowledge Sources

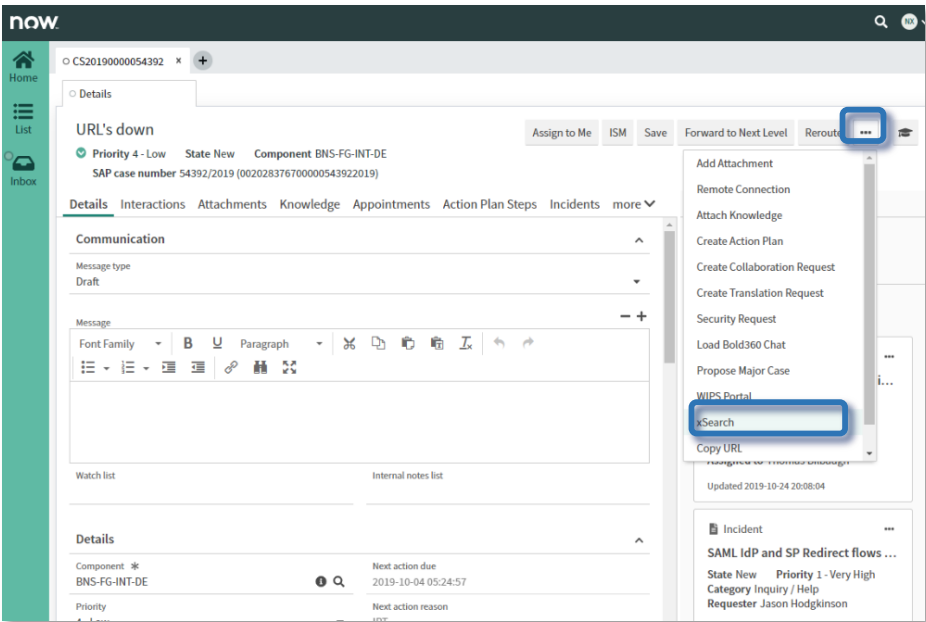
Case Management

Option B: Search using xSearch and/or ISM across various repositories for knowledge articles and records

xSearch

1a Open xSearch in Case record

From the Case window click More UI Actions Icon .
And click **xSearch** from the menu.



Notes

xSearch

ServiceNow integrates with SAP xSearch, which can be launched from within a Case

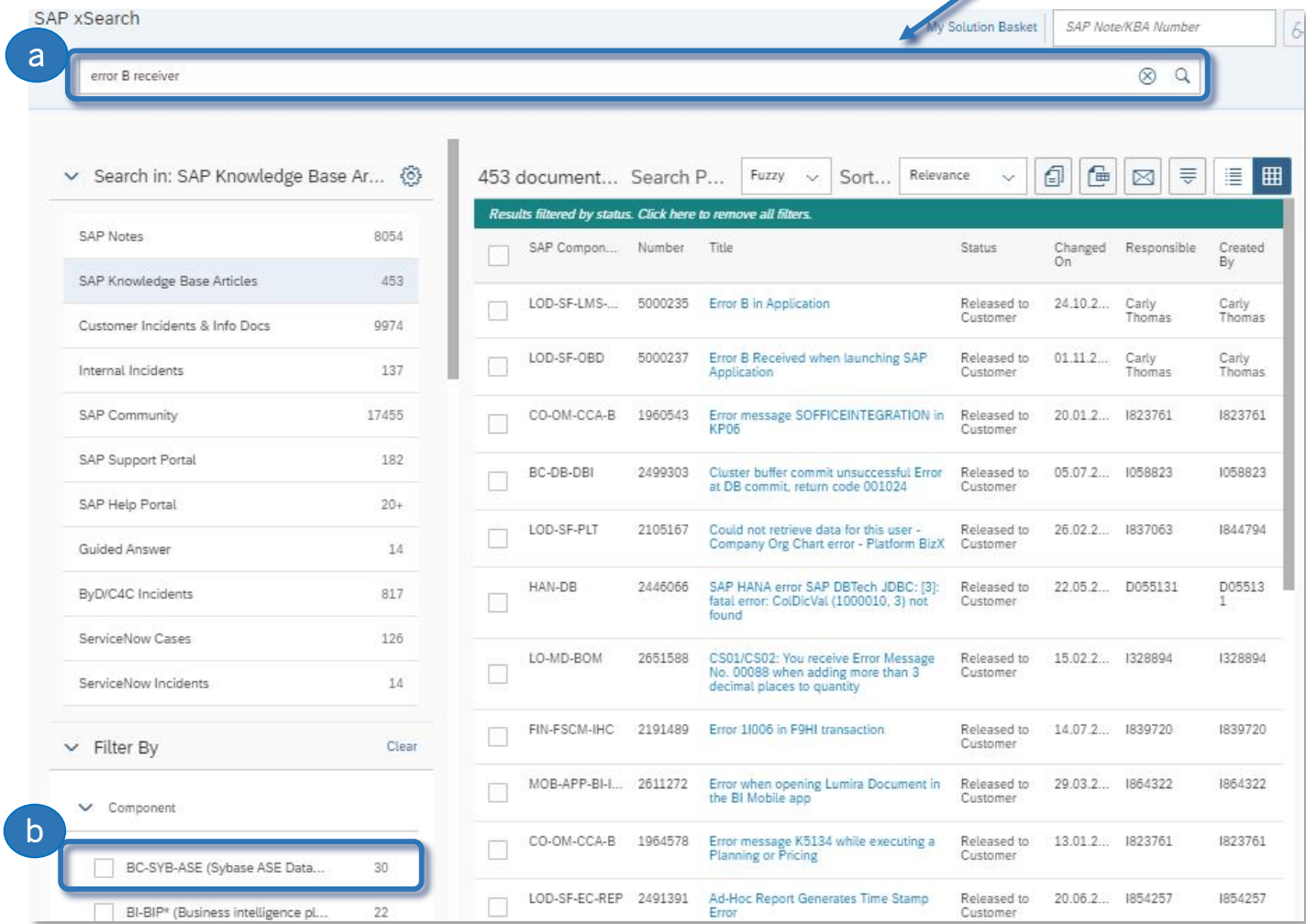
When launched from within a Case, the description and component from the case is populated as the search terms and component filter

1b Review list of recommended articles

A new window is loaded displaying Search Results:
Defaults on SAP Knowledge Base Articles results
a. Case Description is used as the default search terms.
b. Case Component is added to the KBA Component Filter.

1c Adjust search terms if needed

If no relevant search results are returned, try removing or expanding the component filter or adjusting the keywords.



1. Explore Knowledge Sources

Case Management

Option B: Search using xSearch and/or ISM across various repositories for knowledge articles and records

xSearch

1d View full article

Click on the KBA title in search results to view.

SAP xSearch

My Solution Basket

SAP Note/KBA Number

error B receiver

Search in: SAP Knowledge Base Ar...

453 document... Search P... Fuzzy Sort... Relevance

Results filtered by status. Click here to remove all filters.

SAP Compon...	Number	Title	Status	Changed On	Responsible	Created By
<input type="checkbox"/>	LOD-SF-LMS-...	5000235	Error B in Application	Released to Customer	24.10.2...	Carly Thomas
<input checked="" type="checkbox"/>	LOD-SF-OB	5000237	Error B Received when launching SAP Application	Released to Customer	01.11.2...	Carly Thomas
<input type="checkbox"/>	CO-OM-CCA-B	1960543	Error message SOFFICEINTEGRATION in KP06	Released to Customer	20.01.2...	I823761
<input type="checkbox"/>	BC-DB-DBI	2499303	Cluster buffer commit unsuccessful Error at DB commit, return code 001024	Released to Customer	05.07.2...	I058823
<input type="checkbox"/>	LOD-SF-PLT	2105167	Could not retrieve data for this user - Company Org Chart error - Platform BizX	Released to Customer	26.02.2...	I837063
<input type="checkbox"/>	HAN-DB	2446066	SAP HANA error SAP DBTech JDBC: [3]: fatal error: ColDial (1000010, 3) not found	Released to Customer	22.05.2...	D055131
<input type="checkbox"/>	LO-MD-BOM	2651588	CS01/CS02: You receive Error Message No. 00088 when adding more than 3 decimal places to quantity	Released to Customer	15.02.2...	I328894
<input type="checkbox"/>	FIN-FSCM-IHC	2191489	Error 11006 in F991 transaction	Released to Customer	14.07.2...	I839720
<input type="checkbox"/>	MOB-APP-BI-I...	2611272	Error when opening Lumira Document in the BI Mobile app	Released to Customer	29.03.2...	I864322
<input type="checkbox"/>	CO-OM-CCA-B	1964578	Error message K5134 while executing a Planning or Pricing	Released to Customer	13.01.2...	I823761
<input type="checkbox"/>	LOD-SE-FC-REP	2491391	Ad-Hoc Report Generates Time Stamp	Released to	20.06.2...	I854257

SAP Knowledge Base Article

1960543 - Error message SOFFICEINTEGRATION in KP06

Overall Rating: 1 Votes

Version: 5

Validity: 20.01.2014 -

Language: English

Show Change Log

Show Internal Memo

Compare versions

Content: Summary | Header Data | Tabs | Product

Symptom

While changing a template via KP06 transaction you receive the Error Message SOFFICEINTEGRATION : Error while setting data in data provider object

Environment

- SAP ERP Release Independent
- Controlling
- Planning

Reproducing the Issue

- Execute KP06
- Try to change planning the data via Excel template

1e Add article in the Case record

- Flag chosen article.
- Click on Copy to ServiceNow.
- Knowledge article link will be displayed in the Activity stream.

CS20190000056401

Details

[DEMO] - WIPS Request for Escalation - Critical Incident Situation

Priority 3 - Medium State In progress Component CEC-SRV-FSM

SAP case number 56401/2019 (002028376700000564012019)

Details Interactions Attachments Knowledge(1) Appo...

Communication

Message type Draft

Message

Font Family B U Paragraph

Watch list

Internal notes list

Details

Component CEC-SRV-FSM

Priority

Activity

SX SAP XSearch Internal Info - 2019-11-15 12:35:13

Knowledge Article KB0010367 has been attached.

WW Wei Wei Internal Info - 2019-11-08 11:53:38

Support Engineer can leave Internal Info here. Once it's posted in the Case as Internal Notes, this will be replicated to the attached Escalation record too.

WW Wei Wei Field changes - 2019-11-08 11:51:01

Business impact Support Engineer should provide I created.

Action plan template Call to Customer was (Empty)

Login details https://launchpad.support.sap.co

Show More

WW Wei Wei Internal Info - 2019-11-08 09:03:47

1. Explore Knowledge Sources

Case Management

Option B: Search using xSearch and/or ISM across various repositories for knowledge articles and records

ISM

1a Open ISM from Case

1. From the Case window click the ISM button

1b Review list of recommended articles

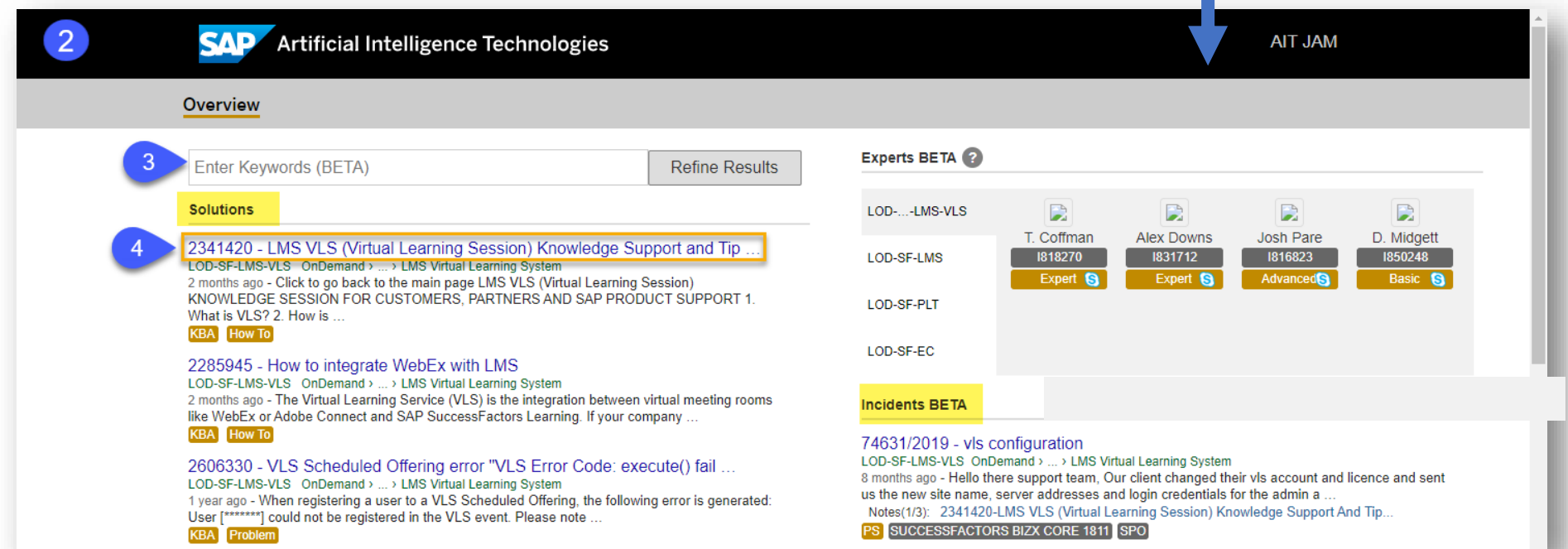
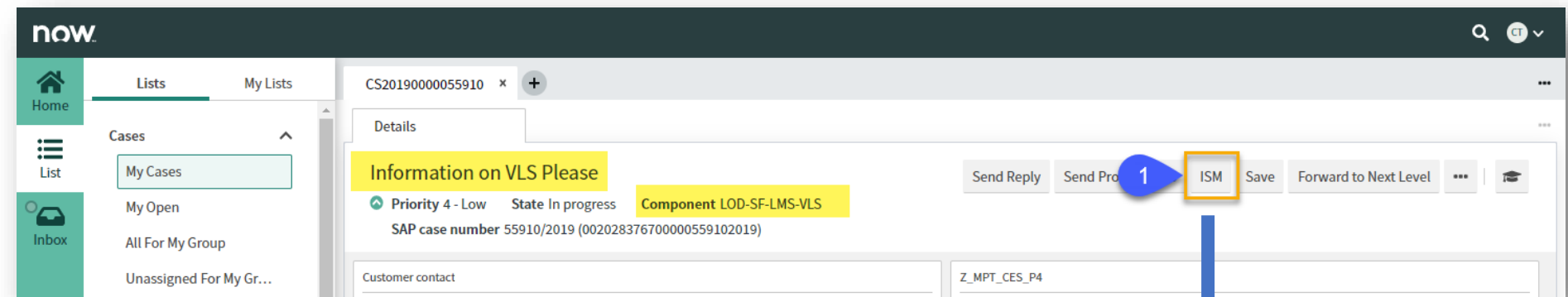
2. A new window is loaded displaying search results:
 - Solutions returns a list of KBAs and SAP Notes
 - Case Description is used as the default search terms (but do not appear in the Keywords bar)
 - Case Component is part of the keyword search

1c Adjust search terms

3. If no relevant search results are returned, try removing or expanding the component filter or adjusting the keywords

1d View full article

4. Click on the KBA title in search results to view. A new browser tab is opened with the KBA



Notes



- KBAs cannot be attached to a Case via the ISM search results. The KBA number will need to be copied and manually attached to the Case.
- ISM returns all SAP KBAs, Notes and past Incidents from the BCP system. It will also return Experts in the product area of the Case.

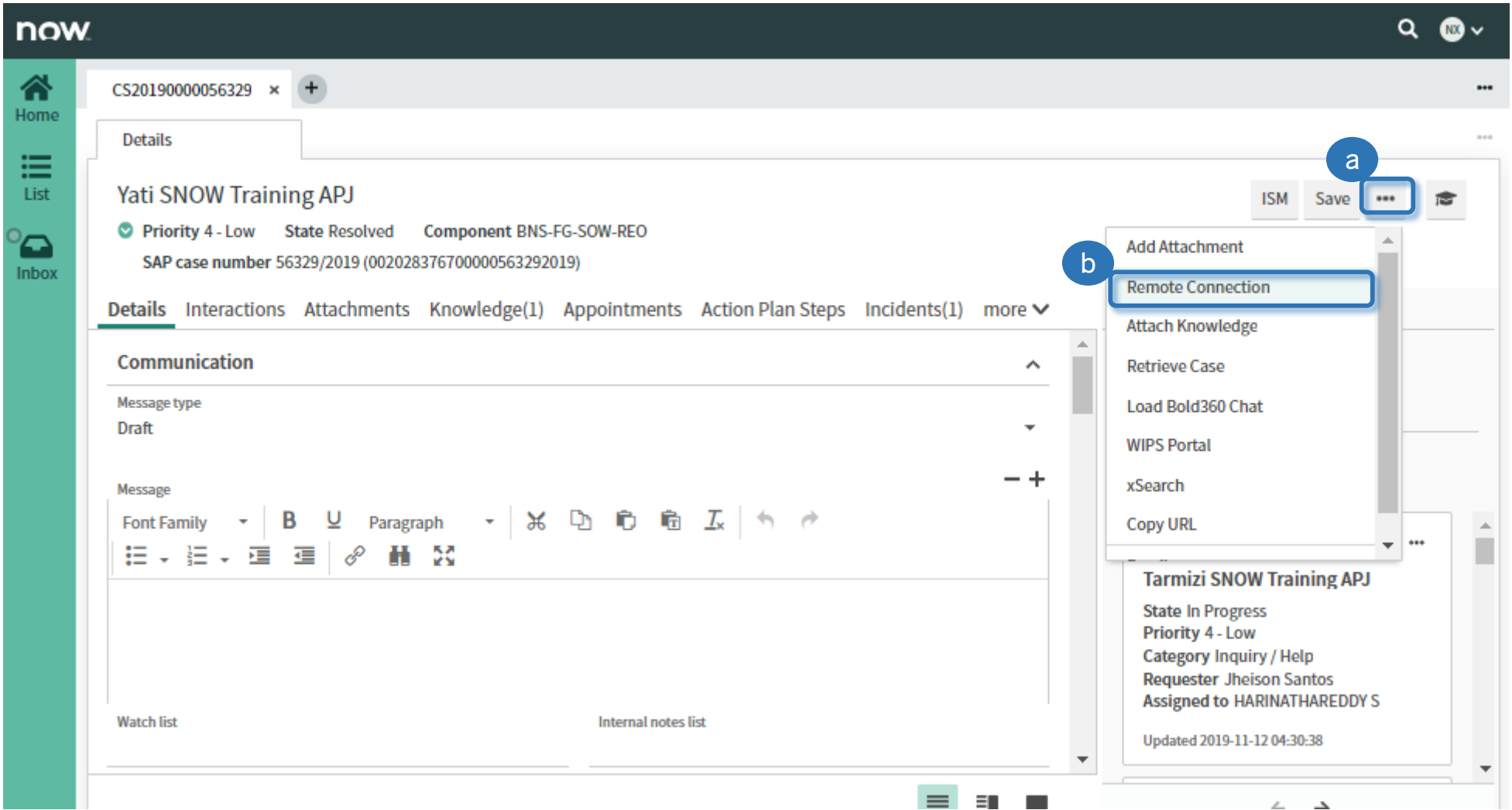
2. Access Customer System (if necessary)

Case Management

Issue relates to Cloud product

2a Access the Cloud Access Manager (CAM)
From the Case window click More UI Actions (...) menu icon.

2b Click Remote Connection to access to customer's system

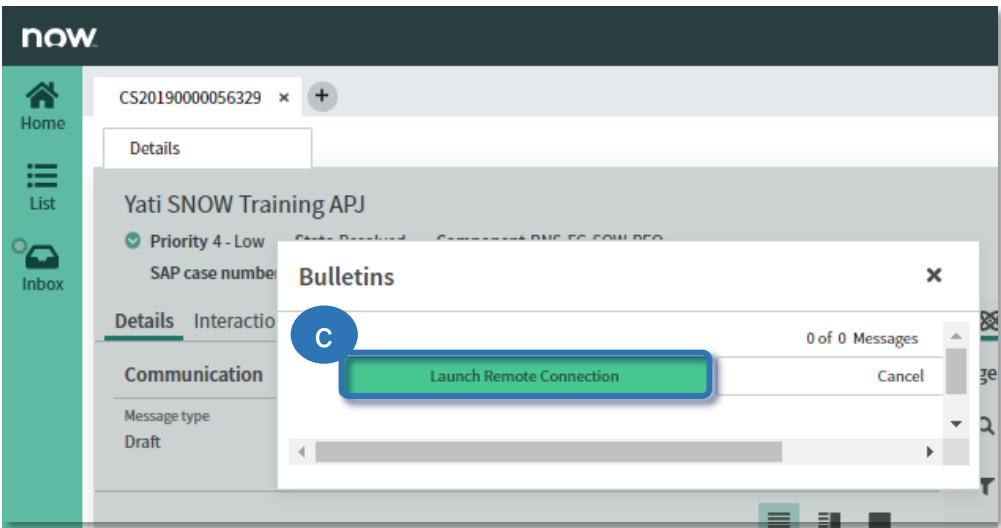


2. Access Customer System (if necessary)

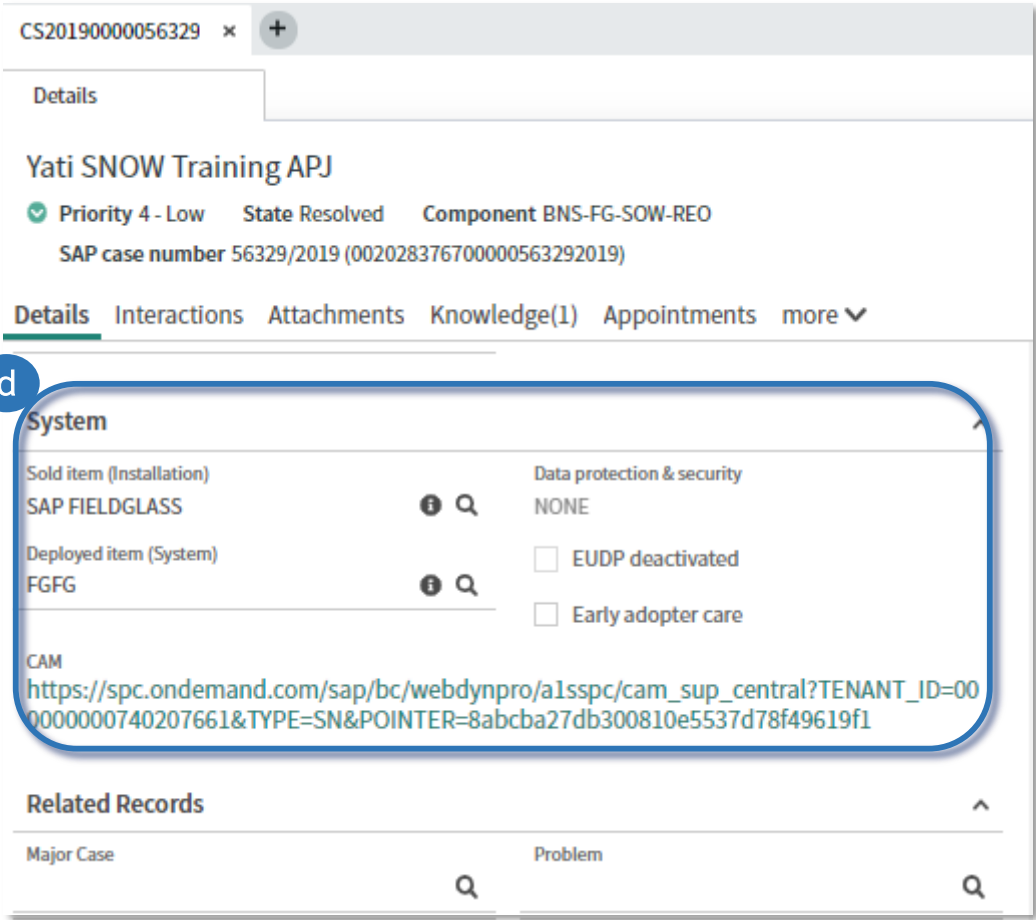
Case Management

Issue relates to Cloud product

2c Click Launch Remote Connection



2d Or use the CAM link, provided in the Case Record in the System area to perform investigation in the Cloud Access Manager system.



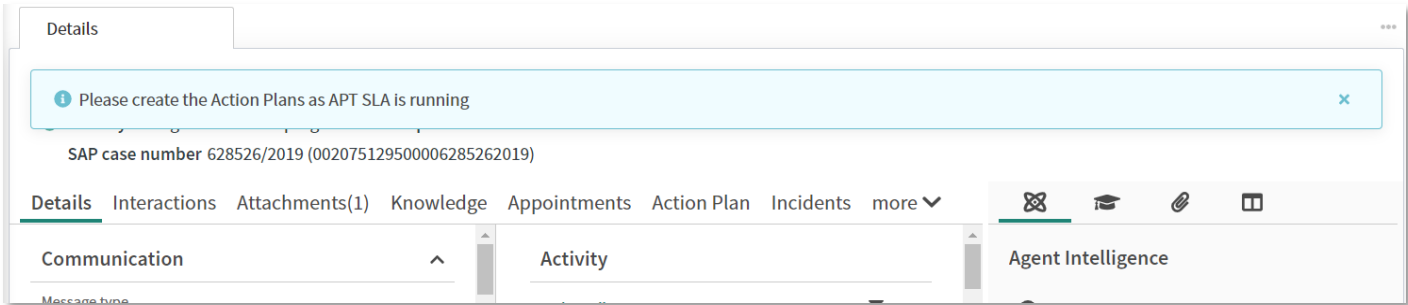
3. Create Action Plan Steps (if necessary)

Case Management

Action Plan is a group of one or more actions plan steps created to capture and document activities that is going to be performed, within a given time, in order to move towards resolution.

The creation of a Action Plan is a **contractual requirement**, but it can also be created regardless the contractual obligation in any point in time of the case lifecycle.

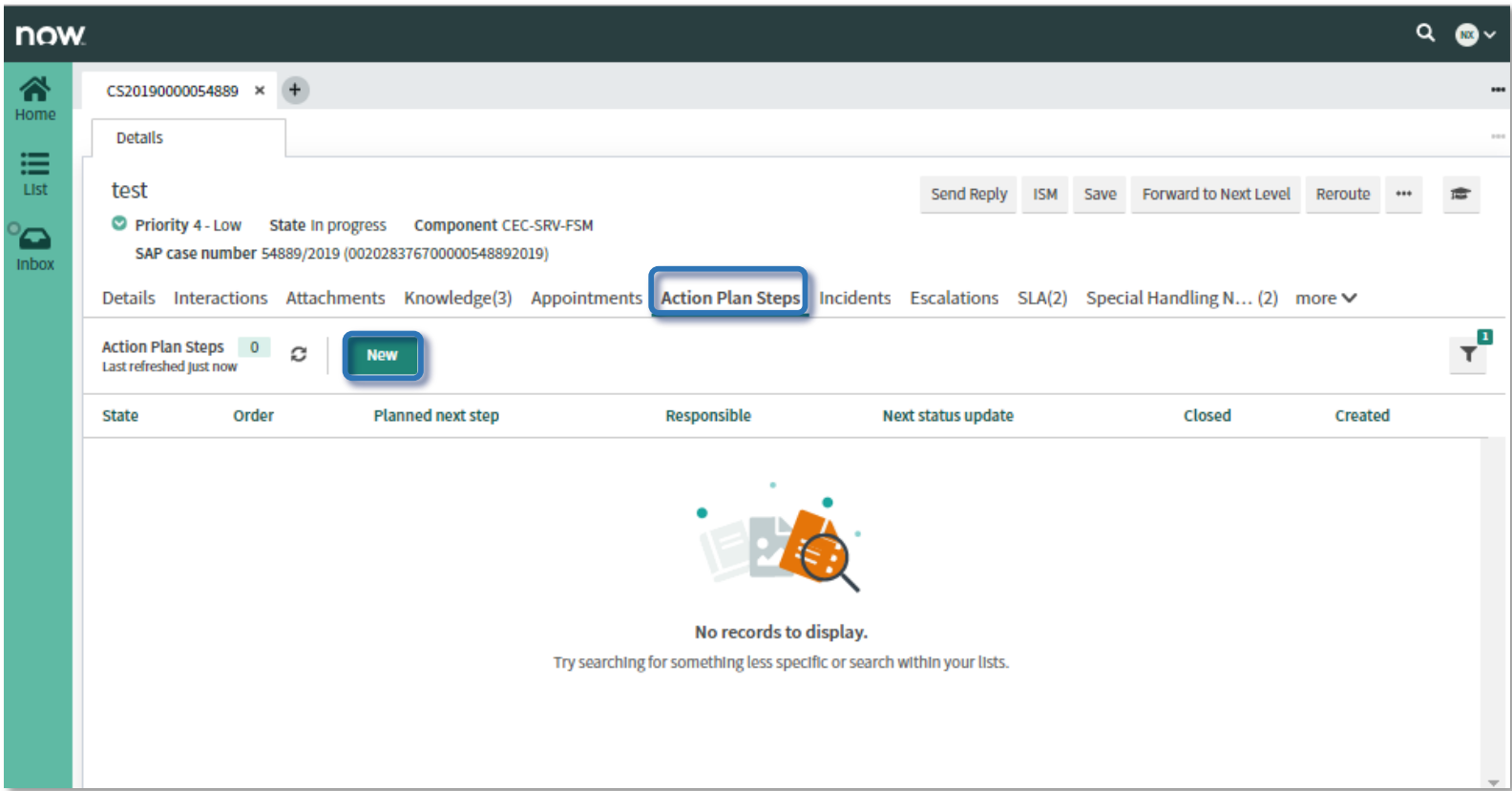
If an Action Plan is mandatory in a Case, NOW System will display a blue banner on the top of the Case header.



Option A: Create Action Plan Steps manually

3a Create new Action Plan Steps

- a. Open a Case and click Action Plan Steps.
- b. Click NEW.



3. Create Action Plan Steps (if necessary)

Case Management

Option A: Create Action Plan Steps manually

3b Fill in all relevant information

The following fields are mandatory.

- a. **Responsible:** Who will perform the step.
- b. **Next status update:** When the next status update is going to be provided.
- c. **Planned next step:** What will be done.

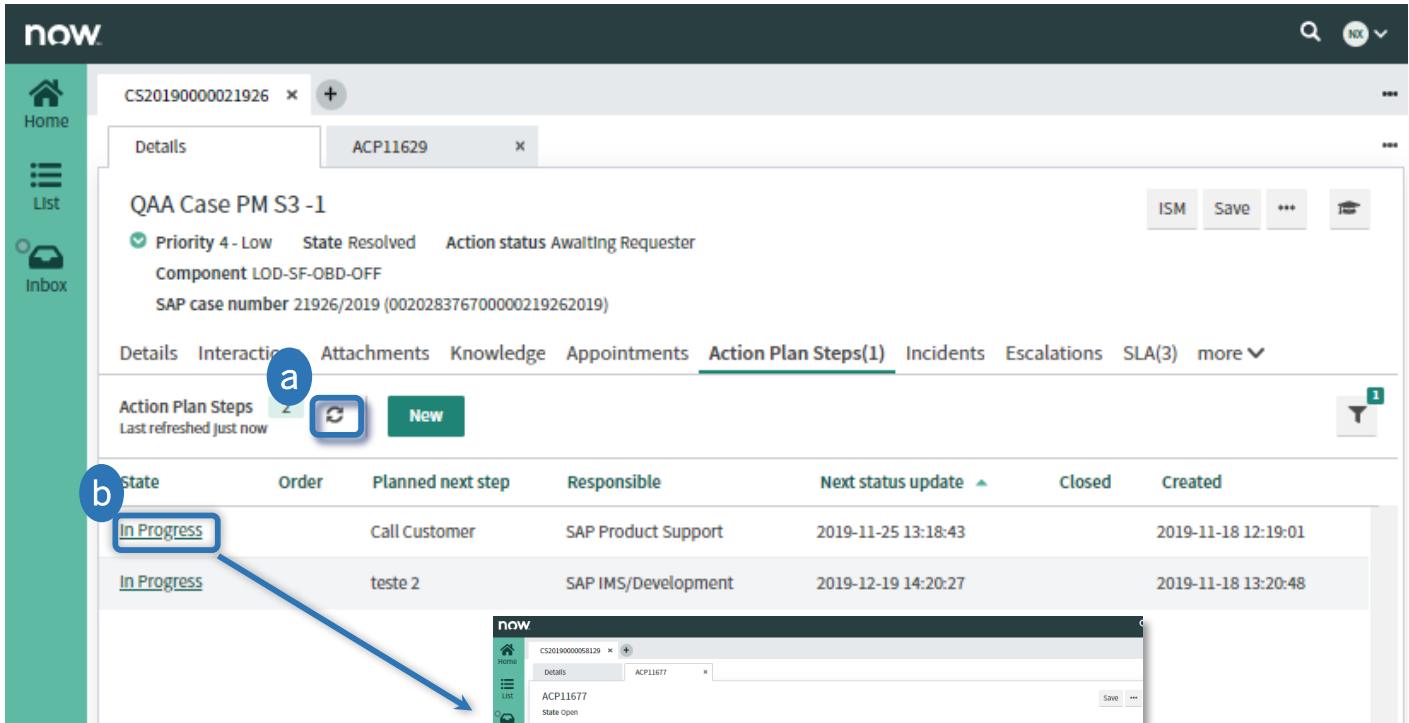
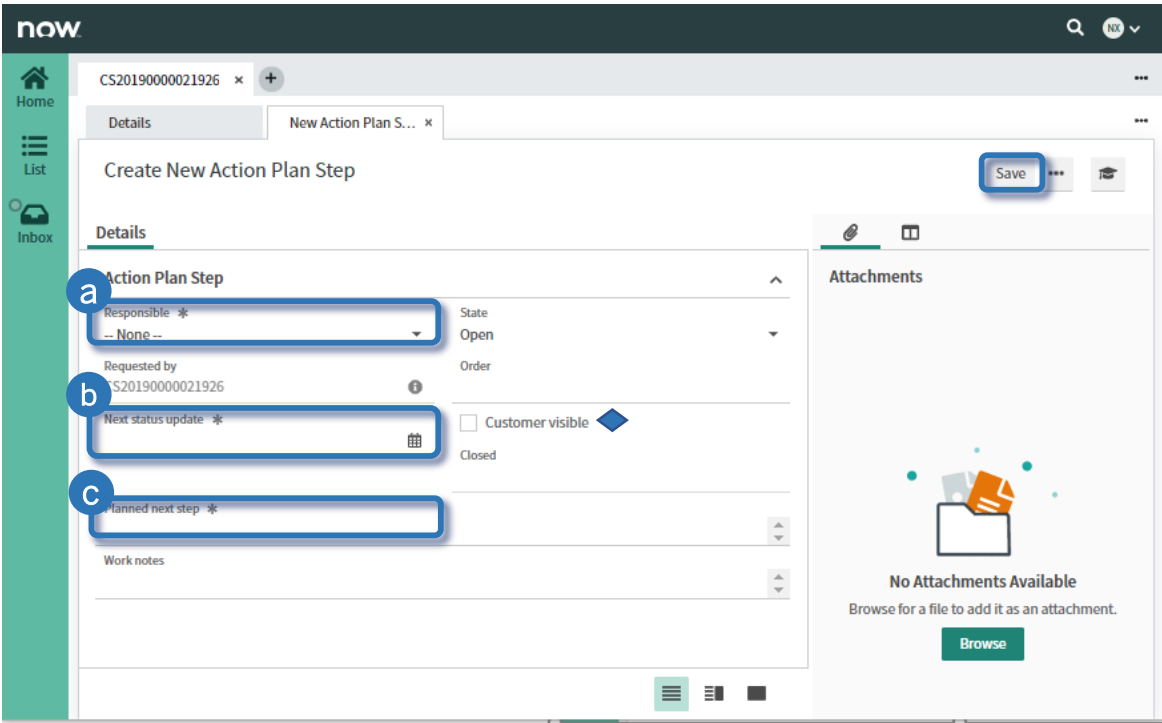
3b Save the Action Plan Step

- a. Click Refresh to see the added Action Plan Step.
- b. To see detailed information, click State.

3b Repeat the steps to capture all actions required

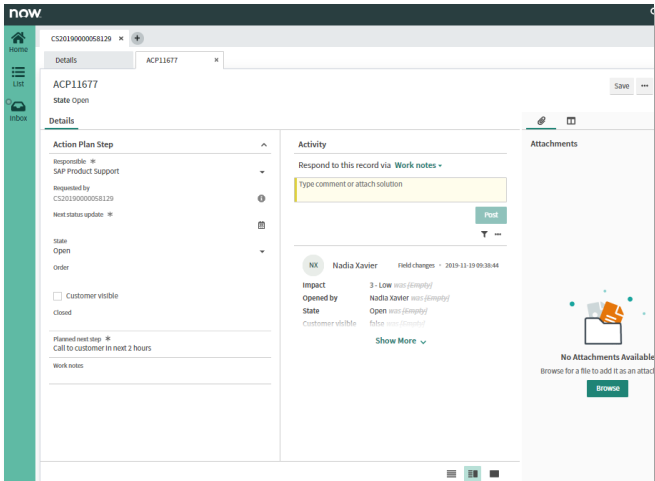
Several Action Plan steps can be created in order to cover all desired activities.

Follow the same steps to create each of them.



Notes

Only by flagging Customer visible (◆) the information will be replicated to the Customer.



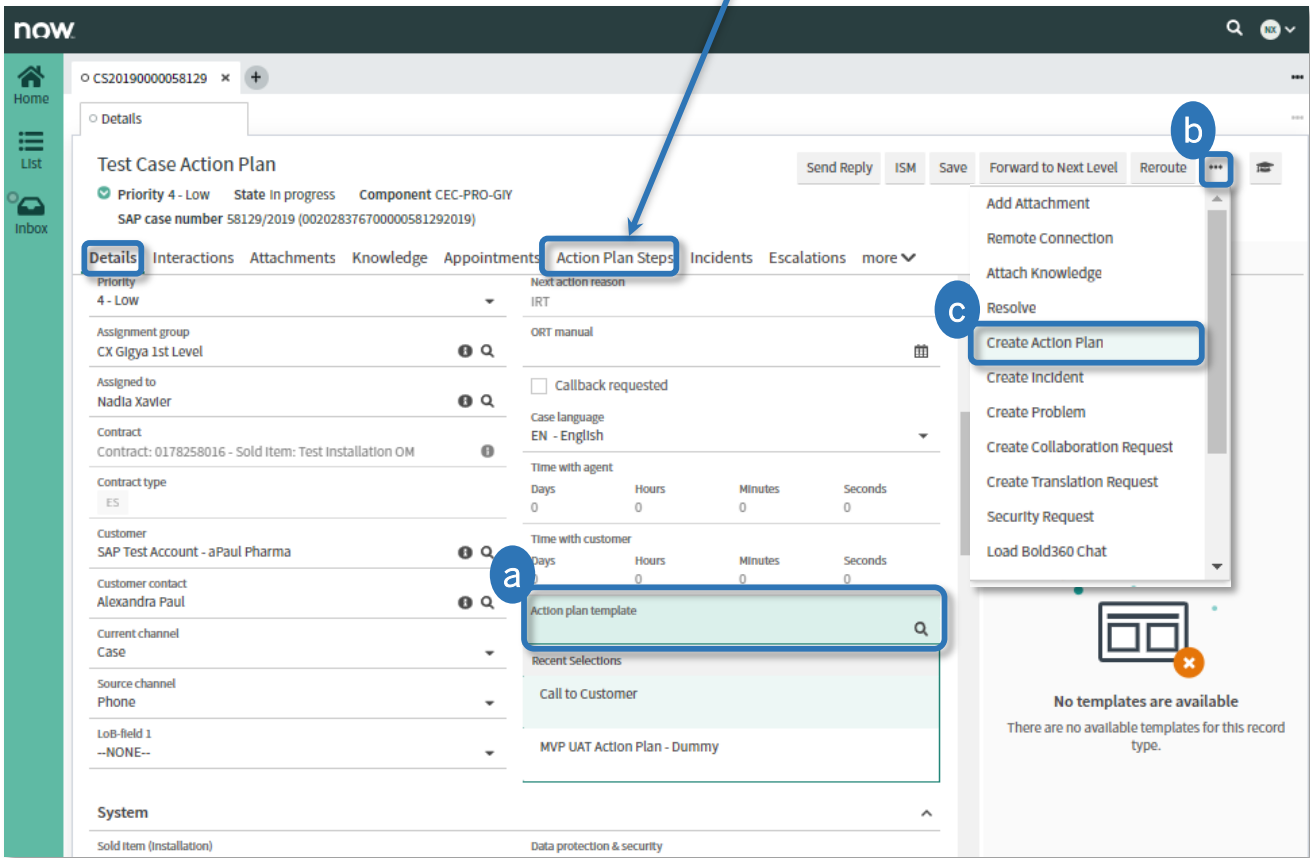
3. Create Action Plan Steps (if necessary)

Case Management

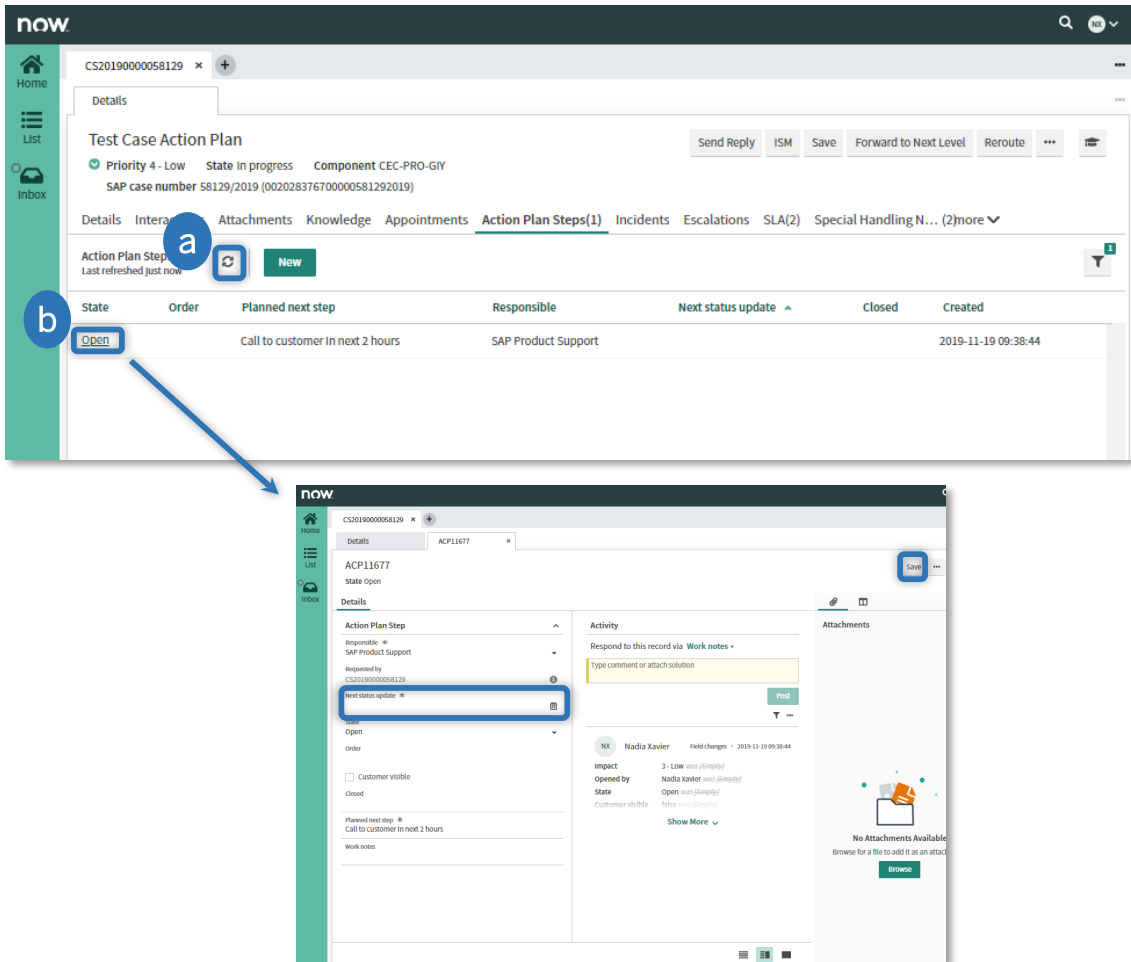
Option B: Create Action Plan Steps using existing Action Plan template

3a Select the applicable Action Plan template from the predefined list

- Step1
- Open the Case, type or search for a Action Plan Template under Details section and click on the chosen Template.
- Step2
- Go to More UI Action icon (...) and click Create Action Plan. Automatically it will be added to the Action Plan Steps section.



- Step3
- a. Click Refresh to see the added Action Plan Step.
- b. Fill the Next status update and Save.



4. Involve Additional Expertise

Case Management

Option A: The next processing level works in the Case and communicates with the customer

Step 1

Click Forward to Next Level.

Step 2

A red banner will automatically be displayed to inform that Internal Info is mandatory

- a. Close the banner.
- b. Write a brief description to inform the next level of support why the Case is going to be forwarded.
- c. Click again Forward to Next Level.

Notes

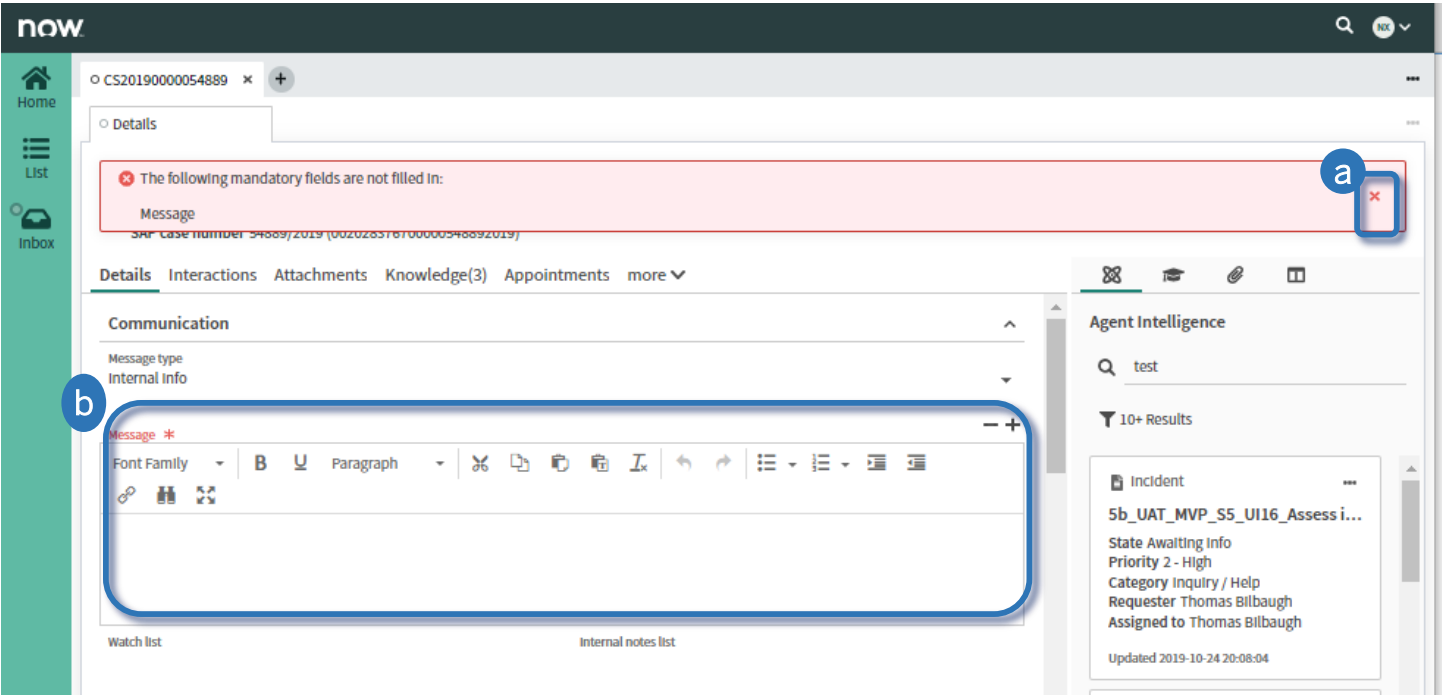
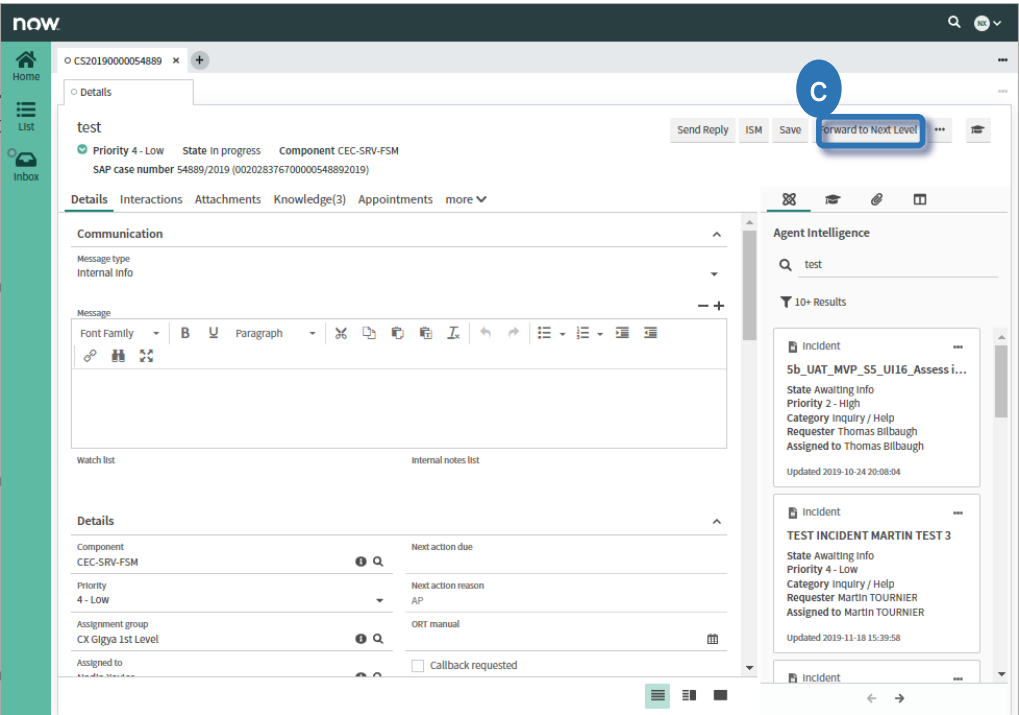
Forward to next level

Forwards the Case to the next support group set up in the assignment rules chain.

The Assignment group field is set up automatically, attending to the routing rules, so after Forward to Next Level , the case is routed to the pre defined next level of support

Reroute

Sends the Case back to the first group in the automatic assignment chain



4. Involve Additional Expertise

Case Management

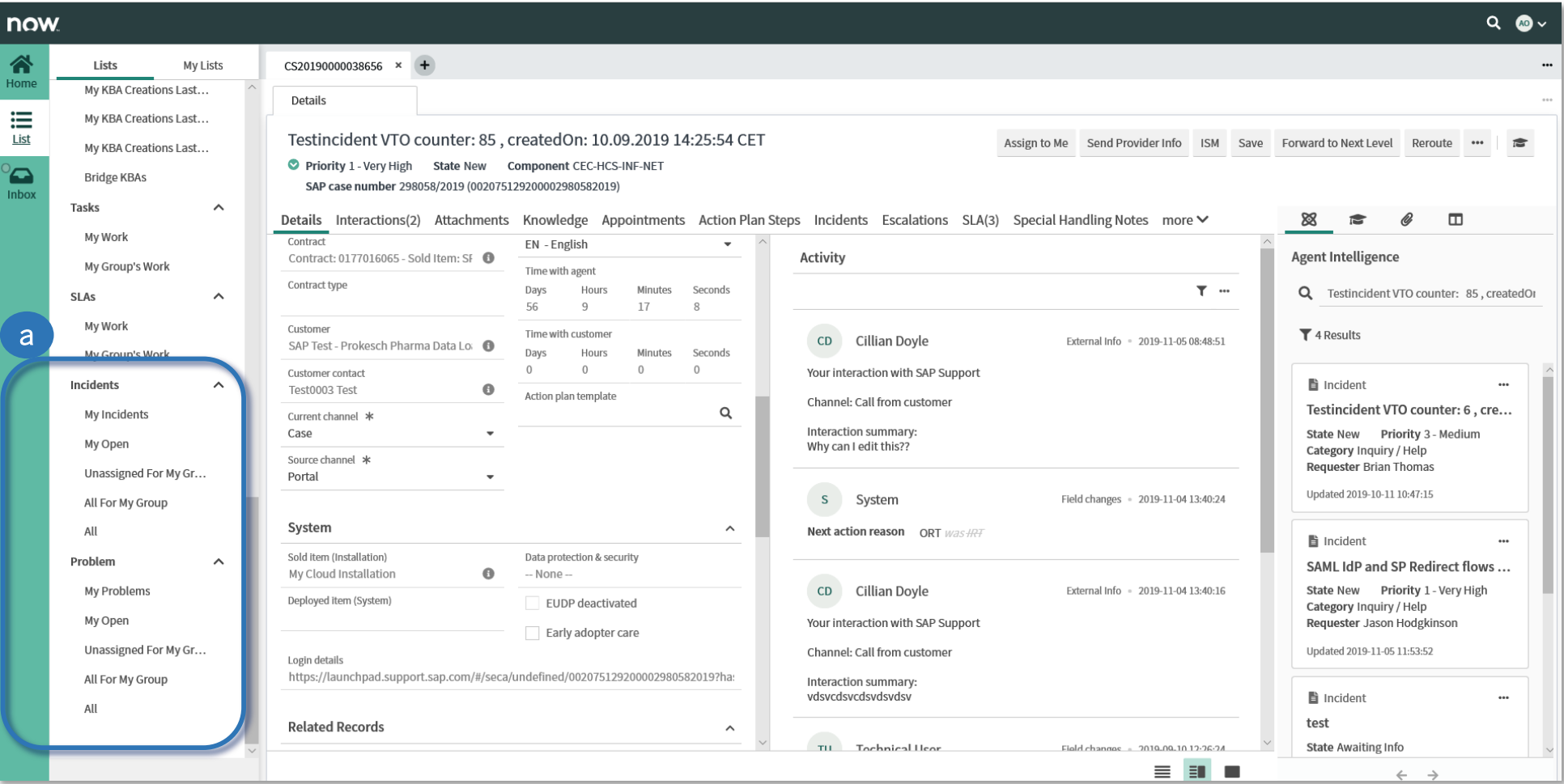
Option B: The next processing level does NOT work in the Case nor communicate with the customer

4a Create Incident or Problem record

4b Fill in all relevant information in the new record

4c Save the record

4d Continue working in the Case



Notes

!

Incident or Problem
Refer to [Create an Incident via Case](#) or [Create Problem via Case/Incident Module](#) procedures for steps b, and c

b

c

5. Bundle Case to Major Case (if necessary)

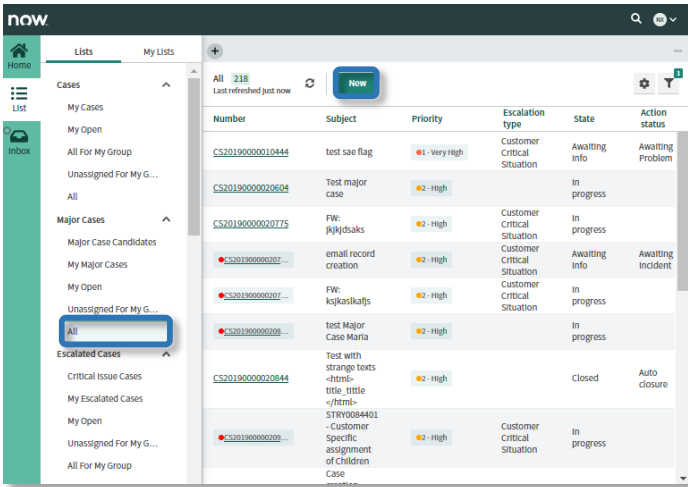
Case Management

Major Case for bundling is the way to link case records with the same reported case issue, to assist in a collaborative effort for resolutions.

Scenario A: Create a Major Case to bundle a Case

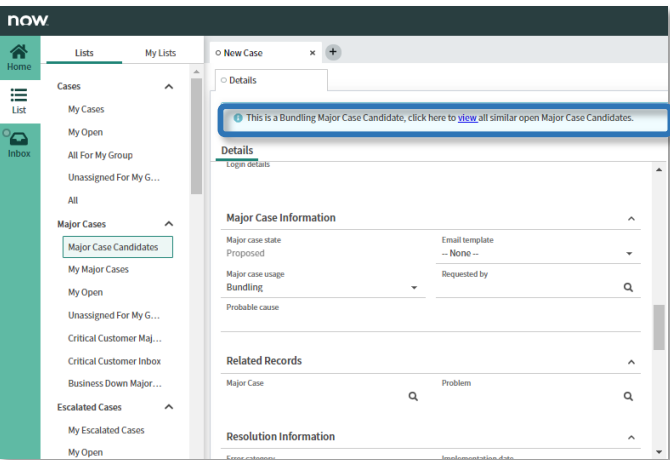
Step1

Create a new Major Case from Major Case list by clicking in NEW.



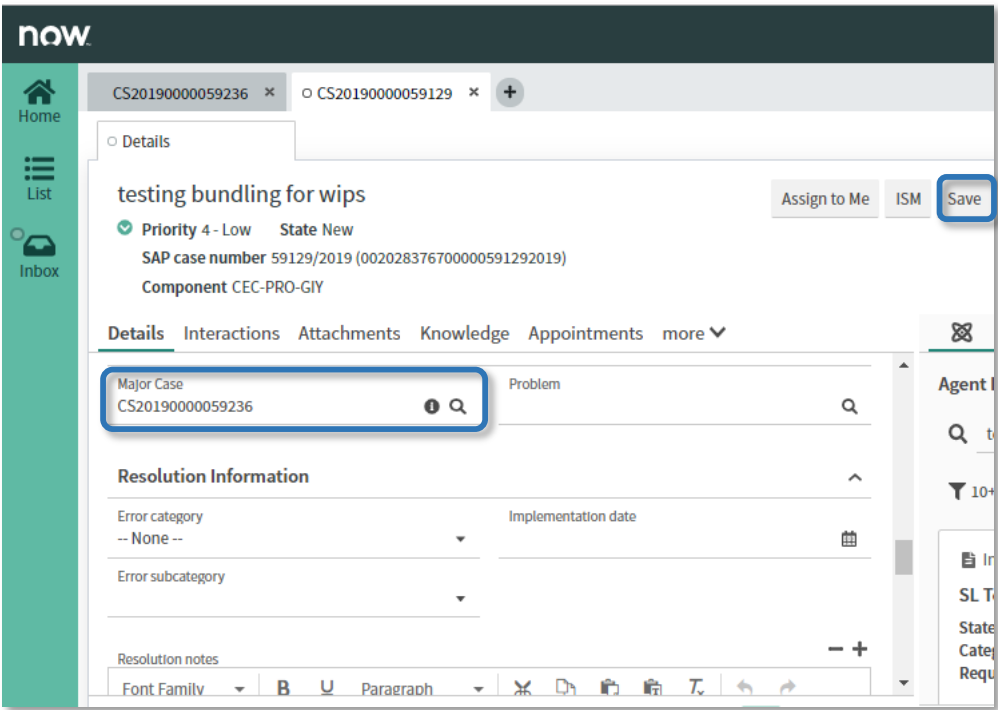
Step2

Fill in mandatory fields and Save.
A blue banner will confirm that a Bundling Major Case is being created.



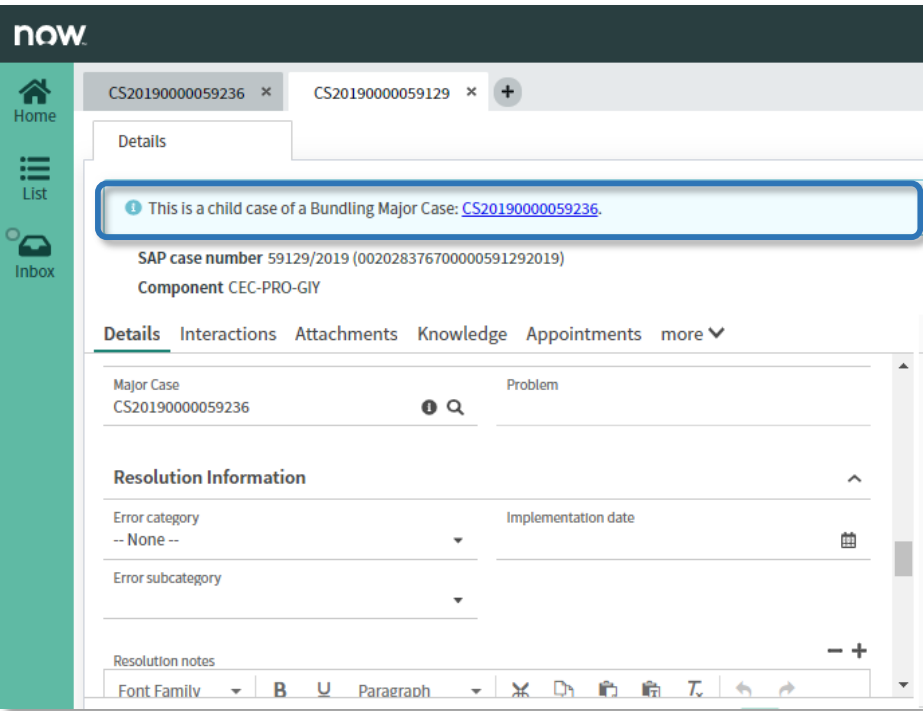
Step3

- Open the Case, which will be linked to the newly created Major Case.
- Enter the major case number in the Major Case field.
 - Click Save.



Step4

A blue banner will confirm that the current Case is a child case of a Bundling Major Case.



Notes

External Info in the major Case will be replicated to all child cases.

5. Bundle Case to Major Case (if necessary)

Case Management

Major Case for bundling is the way to link case records with the same reported case issue, to assist in a collaborative effort for resolutions.

Scenario B: Bundling a case to an existing Major Case

Step1

Search for an existing Major Case with the same reported issue by:

- a. Under More Tab, click **Related Major Records** to see the list of potentially similar Cases.

OR

- b. Use Agent Intelligent to identify a Major Case Record.

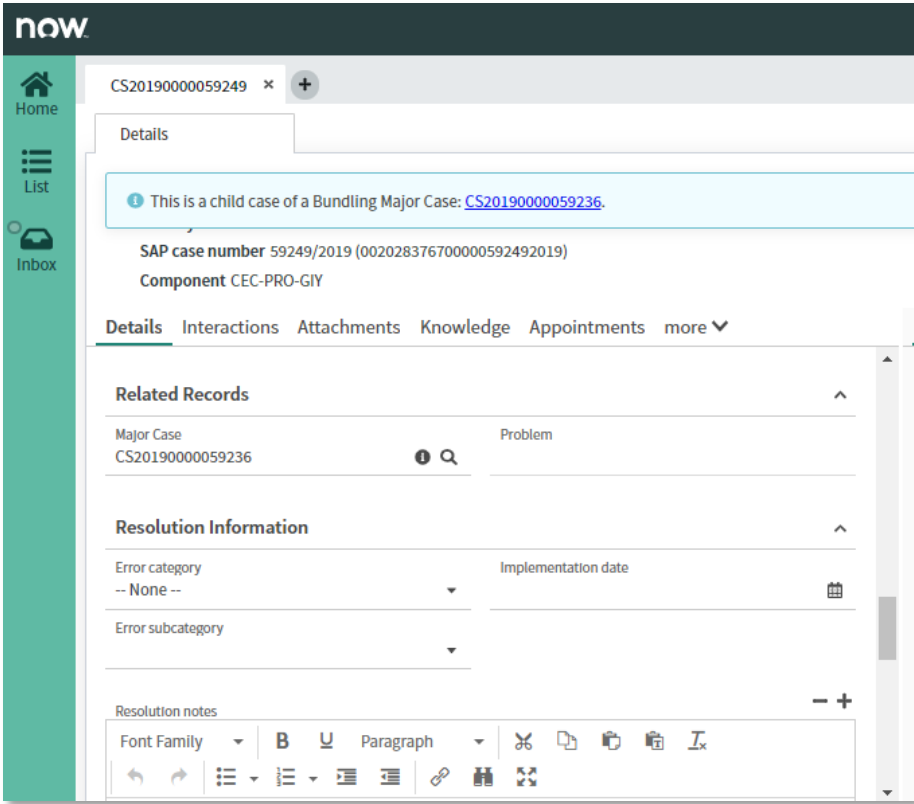
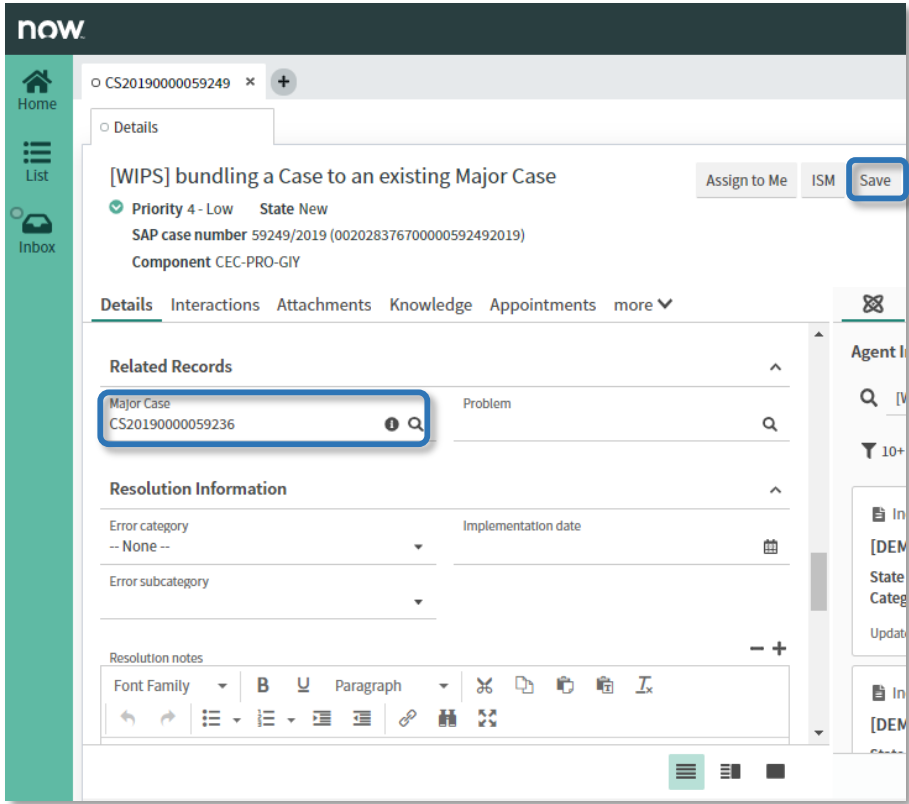
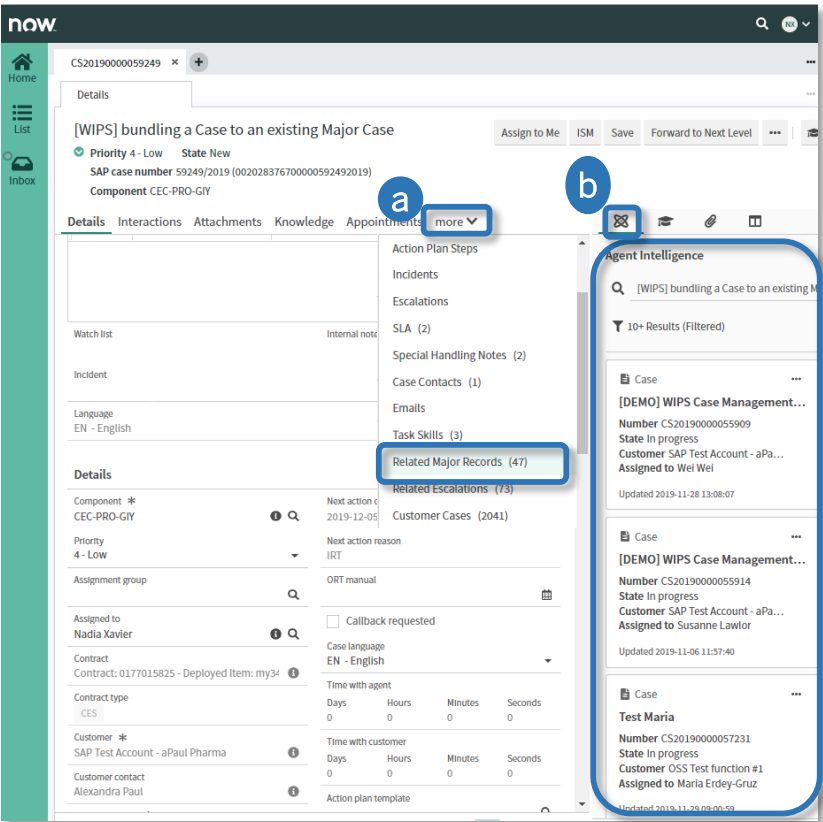
Step2

Open the Case, which will be linked to the existing Major Case identified in Step 1.

- a. Enter the Major Case number in the Major Case field.
- b. Click Save.

Step3

A blue banner will confirm that the current Case is a child case of a Bundling Major Case.



Notes

If multiple Cases need to be bundled to a Major Case, use user interface U16. Click [here](#) for detailed information.



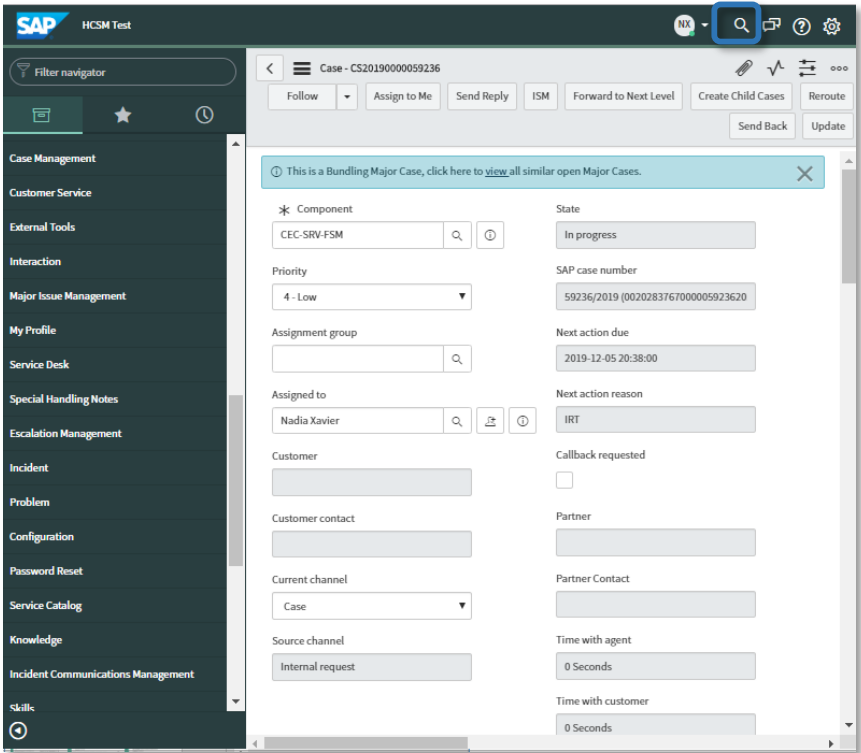
5. Bundle Case to Major Case (if necessary)

Case Management

It is possible to bundle multiple Cases to a Major Case using UI16

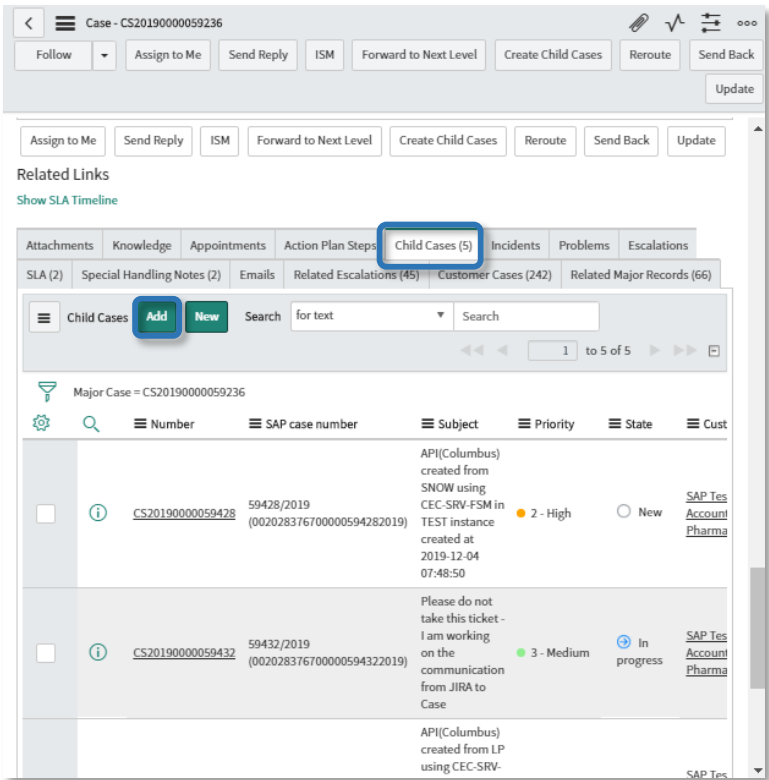
Step1

Open UI16, search and open the desired Major Case.



Step2

In the Child Cases Tab click Add.



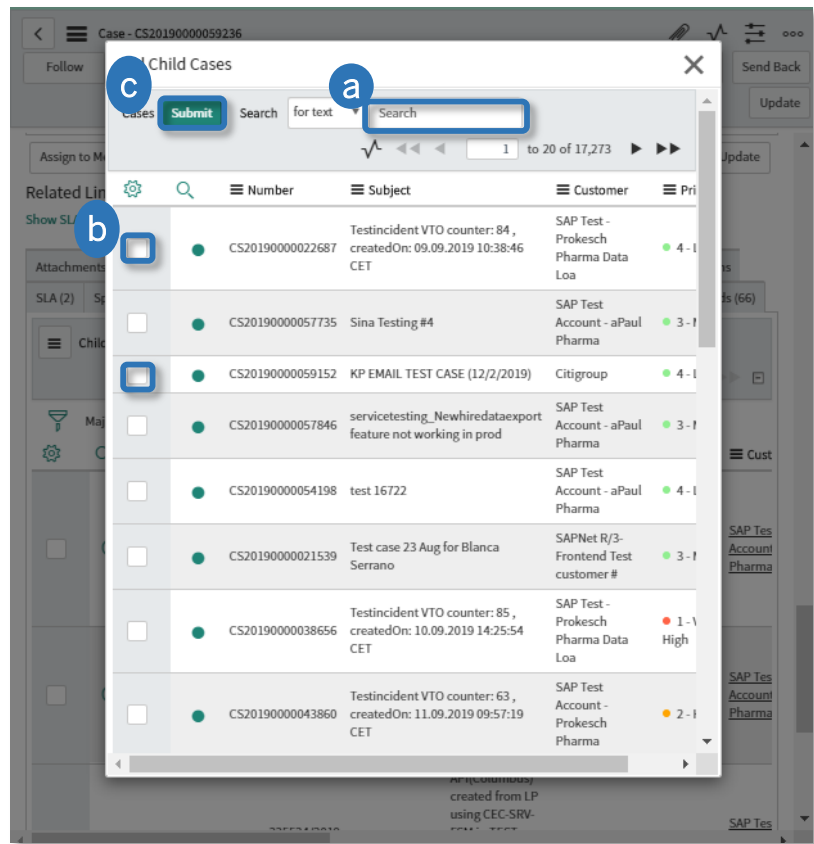
Step3

a. In the pup-up window, search for Case records with related issue and press enter.

b. Select one or multiple cases.

c. Click Submit.

All added cases will be displayed under the Child Case Tab.



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 13, 2019	<ul style="list-style-type: none">WIPS 4.0 initial document	Draft
2.0.0	Nádia Xavier	Nov 22, 2019	<ul style="list-style-type: none">WIPS 4.0 Golden Standard Baseline Document	Released