Validate Information and Categorize the Case

At A Glance

Case Management Process

Log a Case → Categorize a Case (Validate Information and Categorize the Case) → Investigate and Diagnose → Resolve and Recover → Validate and Close

Purpose

Validating Case information ensures that all required information has been provided and documented properly in the record in order to allow timely investigation and diagnosis of the issue. Cases that are accurately categorized become useful future input element for various IT service management processes (e.g. Problem Management and Knowledge Management).

Best Practice for validating Case information

- Each Case record should only contain one issue. Follow the instructions here to split Case with multiple issues into individual Case records with single issue.
- If necessary, document steps to reproduce the reported issue in the Description field. Click here to see how to document steps for reproduction.

1. Validate All Case Information

- Special Handling Notes
- Priority and Business Impact
- Component
- Contracts and SLAs
- EUDP Restriction
- Early Adopter Care Program and BETA Shipment
- Attachment

2. Create Service Request (if necessary)

2a Create Service Request record via Case

2b Fill in mandatory fields in the Service Request record

2c Save the record

Available in future release

3. Request for Escalation (if necessary)

Scenario 1: Critical Incident Situation

3a Work in the current Case and provide information in Escalation record if necessary

Scenario 2: Business Down Situation

3a Change Case's Priority to P1 to trigger the automatic creation of Major Incident Candidate

3b Continue working in the Case and provide information in Escalation record if necessary

Scenario 3: Critical Customer Situation

3a Request for escalation

3b Continue working in the Case and provide information in Escalation record if necessary

Available in future release

Notes

An Escalation record can be attached to a Case in the situation of escalation. However, the Support Engineers himself cannot create the Escalation record.

The trigger of escalation management process can be done at later stages of Case Management too.

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1. Validate All Case Information

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Special handling notes

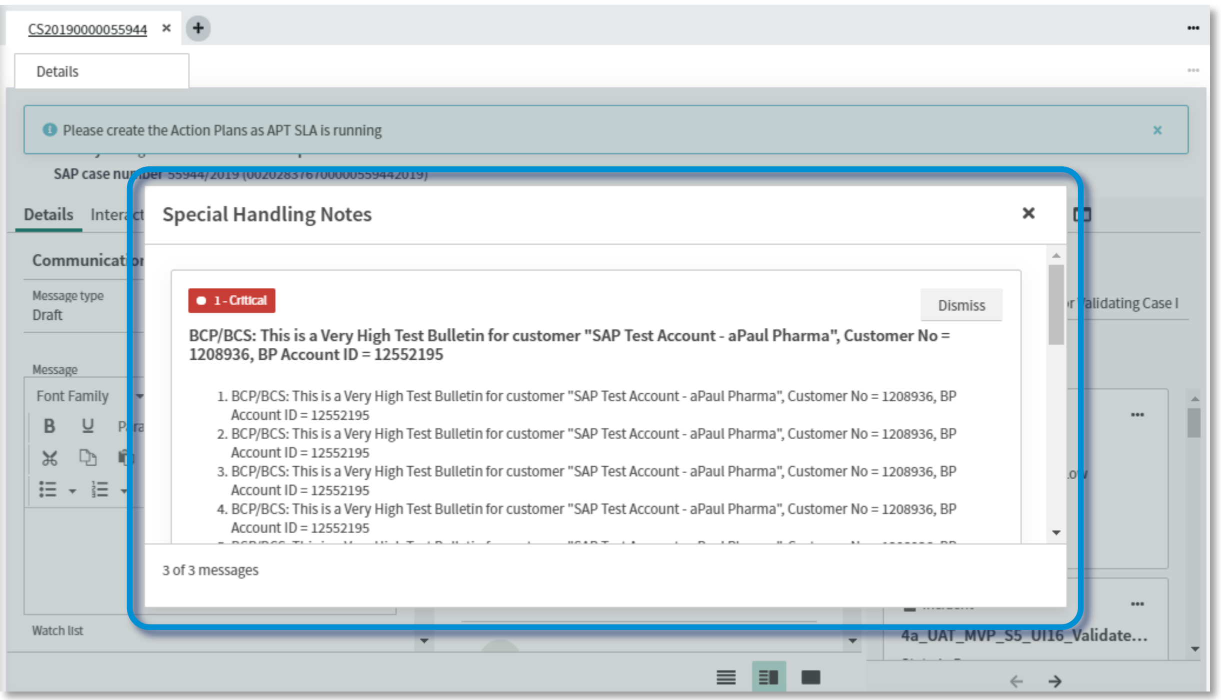
Whenever the Case record is opened, the Special Handling Notes are displayed in the pop-up window. These notes provide specific requirements or agreements regarding the customer, system installation, handling restrictions, etc. that are relevant for the Case handling.

Step 1

Scroll to check all messages for additional instructions on the special handling of this Case. You may also check the information in the **Special Handling Notes** tab.

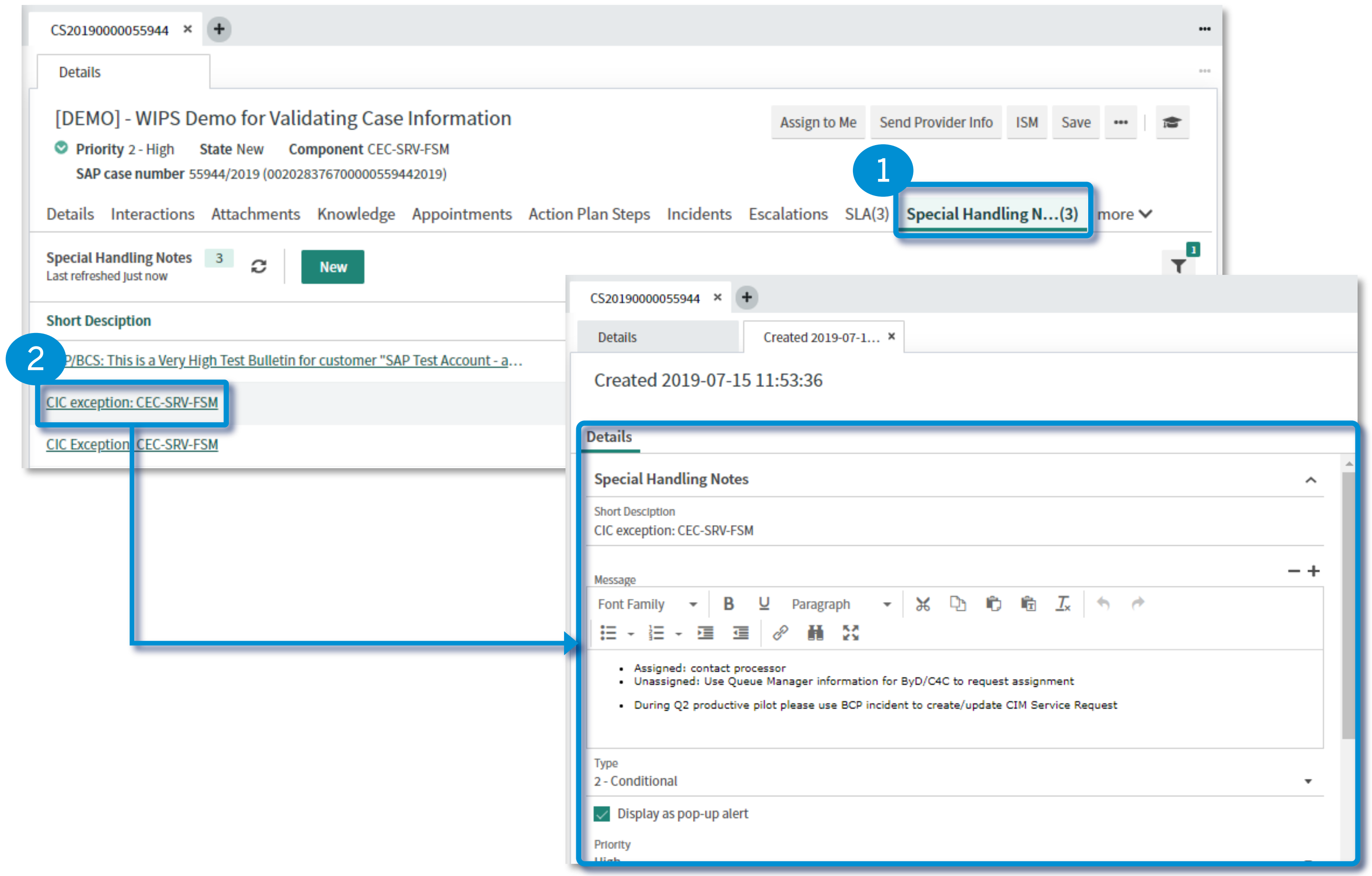
Option A: Check Special Handling Notes in the pop-up window

All special handling notes are listed in the pop-up window.



Option B: Check Special Handling Notes the Special Handling Notes tab

Click each of the special handling notes listed down in the **Special Handling Notes** tab to view the individual content.



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1. Validate All Case Information

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Notes

Priority is the urgency of the issue reported in the Case. It is determined and assigned by the Case Creator. However, Priority can be changed by the reporter or the Support Engineer if necessary.

Priority is categorized in 4 levels:

- 1 – Very High (P1)
- 2 – High (P2)
- 3 – Medium (P3)
- 4 – Low (P4)

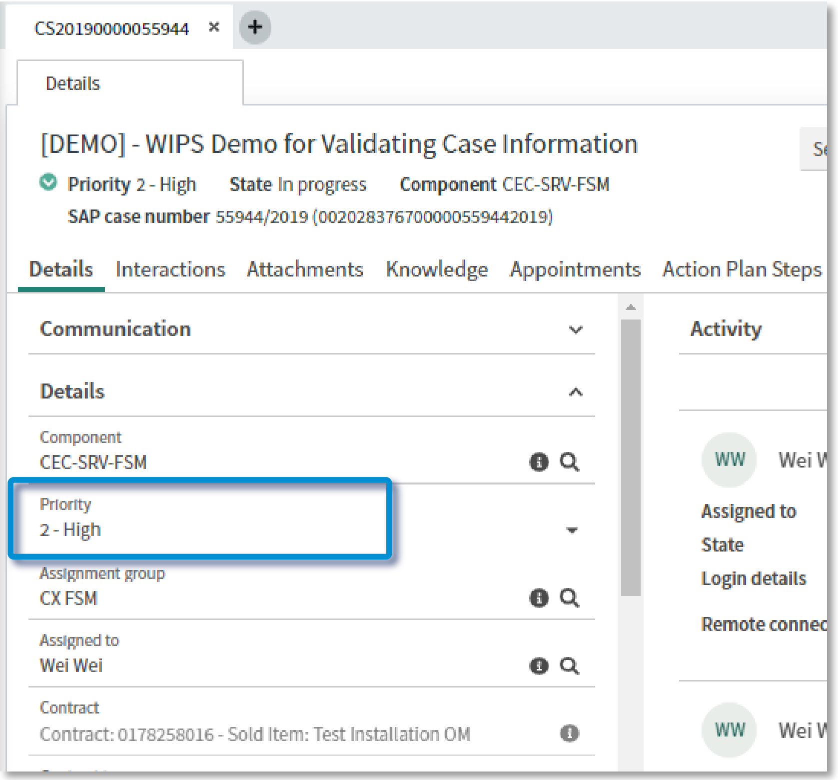
More information regarding priority levels can be found here.

Priority and Business Impact

When the Case has a Priority of 1 – Very High or 2 – High, it is mandatory to provide justification in the Business Impact field. The display of Business Impact field is conditional on the level of Priority.

Step 1

Check the **Priority**.



Step 2

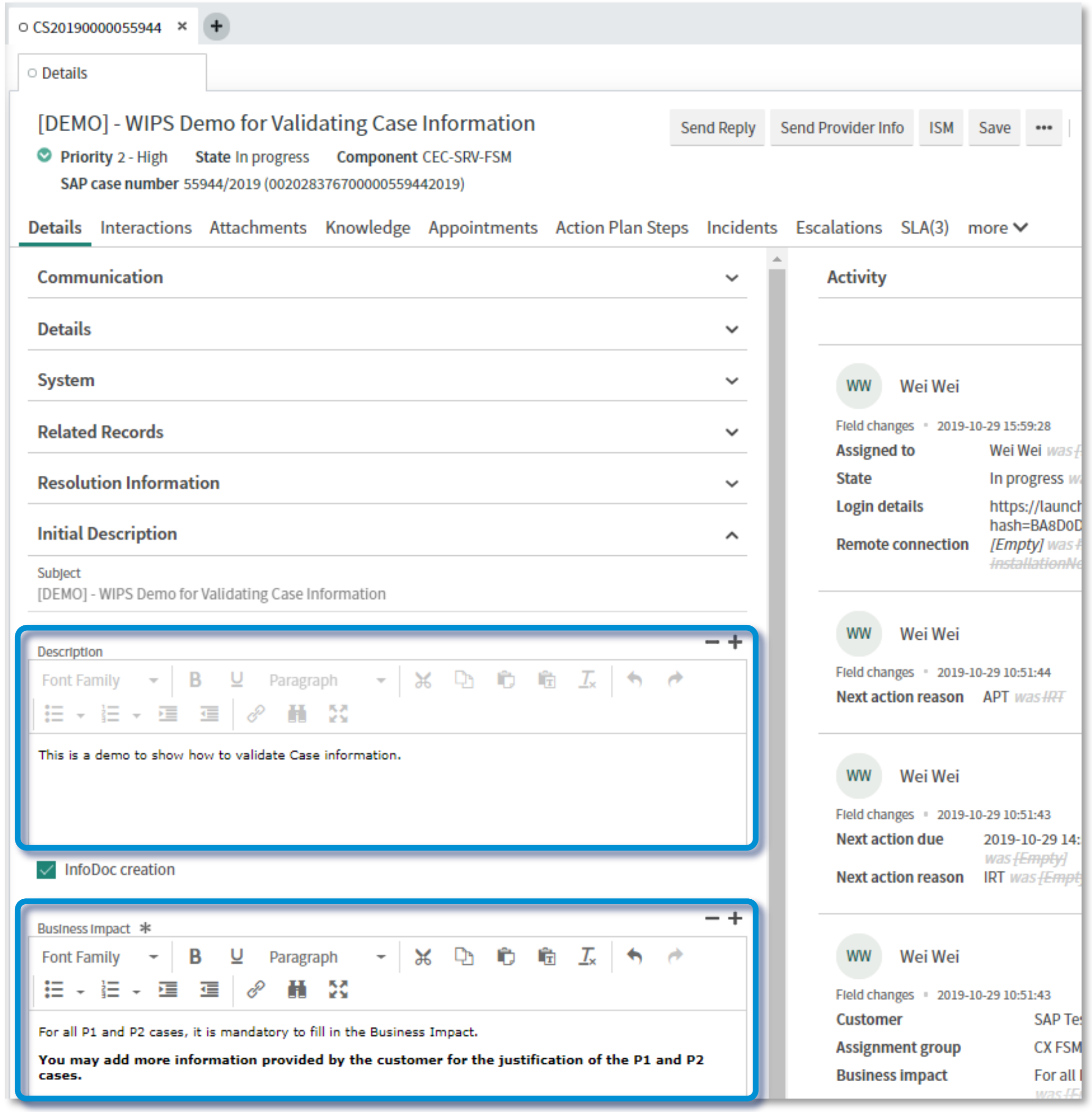
Read the **Initial Description** to understand the customer's issue. Make sure **Business Impact** for P1 or P2 Case has been provided by the customer.

Step 3

Contact the customer for justification of the impact on the core business if it's required or necessary. Include the new information provided by the Customer in the **Business Impact** field.

Step 4

Follow the WIPS entry for Downgrading Process if the Very High priority cannot be justified and there is a need to lower the priority level of the Case.



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What is Priority?

Priority is the urgency of the issue reported in the Case. It is determined and assigned by the Case Creator. However, Priority can be changed by the reporter or the Support Engineer if necessary.

What are the 4 levels of Priority?

1 – Very High

- Problem with **very serious consequences** for normal business processes or IT processes related to **core business processes**.
- **Urgent** work cannot be performed.
- This is generally caused by one of more of the following circumstances:
  - A productive system is completely down;
  - The imminent system go-live or upgrade of a production system cannot be completed;
  - The customer's core business processes are seriously affected;
  - A workaround is not possible for each of the circumstances mentioned above.
- The issue **requires immediate processing** because the malfunction **may cause serious losses**.
- In case of go-live or upgrade, the reason to delay go-live or upgrade must be one that would cause serious losses if not resolved beforehand.

2 – High

- **Normal** business processes are **seriously** affected.
- **Necessary** tasks cannot be performed.
- Issue is caused by incorrect or inoperable functions in the SAP system that **are required immediately**.
- The issue is **to be processed as quickly as possible** as a continuing malfunction can **seriously disrupt** the entire productive business flow.

3 – Medium

- **Normal** business processes are affected.
- The problem is caused by incorrect or inoperable functions in the SAP system.

4 – Low

- The problem has **little or no effect** on normal business processes.
- The problem is caused by incorrect or inoperable functions in the SAP system that are **rarely used or not required daily**.

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What scenarios and business impacts are considered as Priority 1 – Very High?

Scenario / Business Impact	Explanation
A productive system is completely down	▪ The entire system is technically down and cannot be brought back up ▪ System goes down multiple times a day requiring restarts resulting in disruption of the core business process ▪ Core business process is down without any feasible workaround.
The imminent system go-live or upgrade of a production system (as relates to an SAP system) can't be completed	▪ Key Milestone (including Go / No Go decision for a project phase) is to happen in the next 5 business days and the customer is losing money as a result of a potential delay to the project. ▪ For test and quality systems very high priority will only be justified in the situations where they can jeopardize a production system ▪ Customers should be given the benefit of doubt and any ambiguity around the imminent Go-live definition should be addressed to the responsible person in the region where the customer is located
The customer's core business processes are seriously affected	▪ A business process that can result in significant financial loss or legal ramifications if it cannot be executed on time (example: Shipping, Billing, Payroll)
And for each circumstance a feasible workaround is not available	▪ A workaround is considered feasible if it requires only minimal level of manual intervention from the customer for the short term ▪ An example of this would be utilizing a different business process to achieve the same end result, rescheduling the job to a different server/time of the day, etc. ▪ A workaround is not considered feasible if it requires the use of processes outside of an SAP system

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1. Validate All Case Information

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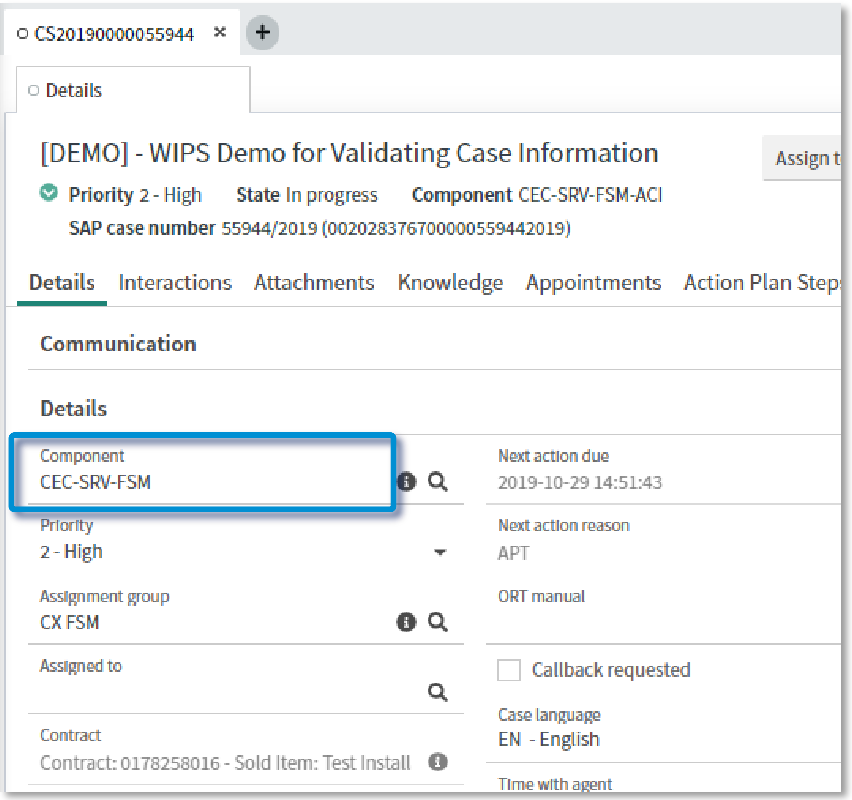
Component

1a Check the original component provided by the customer and prepare handover information if adjustment is needed

Step 1

Based on the information provided in the Case, check whether the correct component has been chosen by the customer.

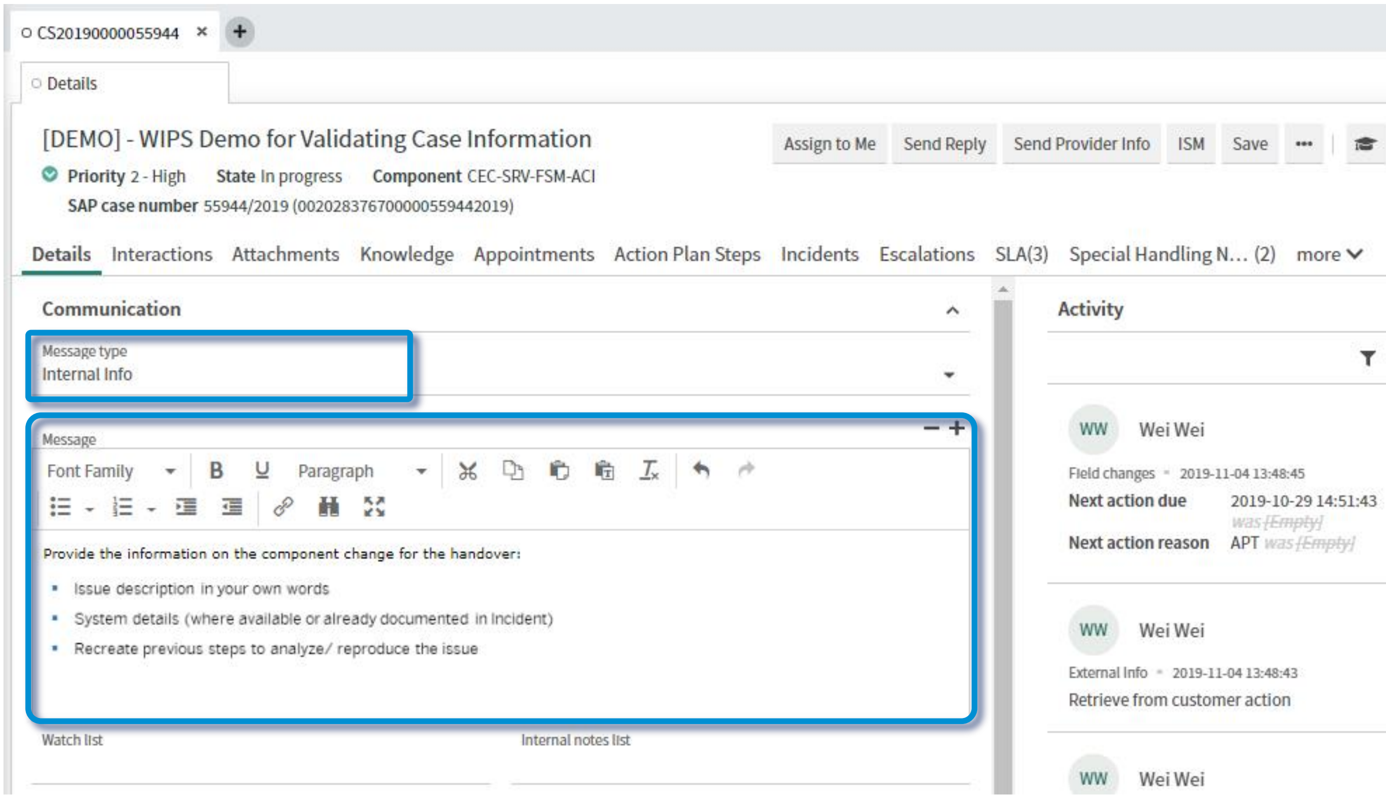


Step 2 (if applicable)

Based on the initial analysis, if the Support Engineer decides that the component needs to be changed, the Support Engineer should document the findings in the **Message** field and choose the **Message type** as **Internal Info**.

Recommendation is to provide at least the following information :

- Issue description in your own words
- System details (where available or already documented in Incident)
- Recreate previous steps to analyze/ reproduce the issue



1. Validate All Case Information

Case Management

Component

1b Adjust the component

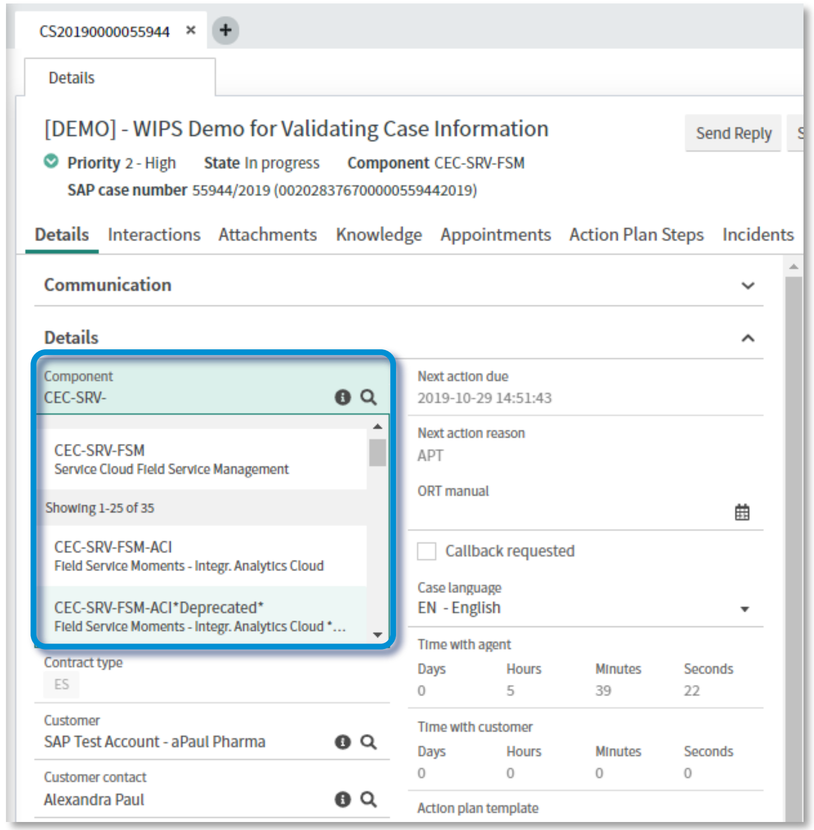
Step 1

Manually change the component to reassign the Case. This can be done either by directly typing the component name in the **Component** field, or by searching via the component list.

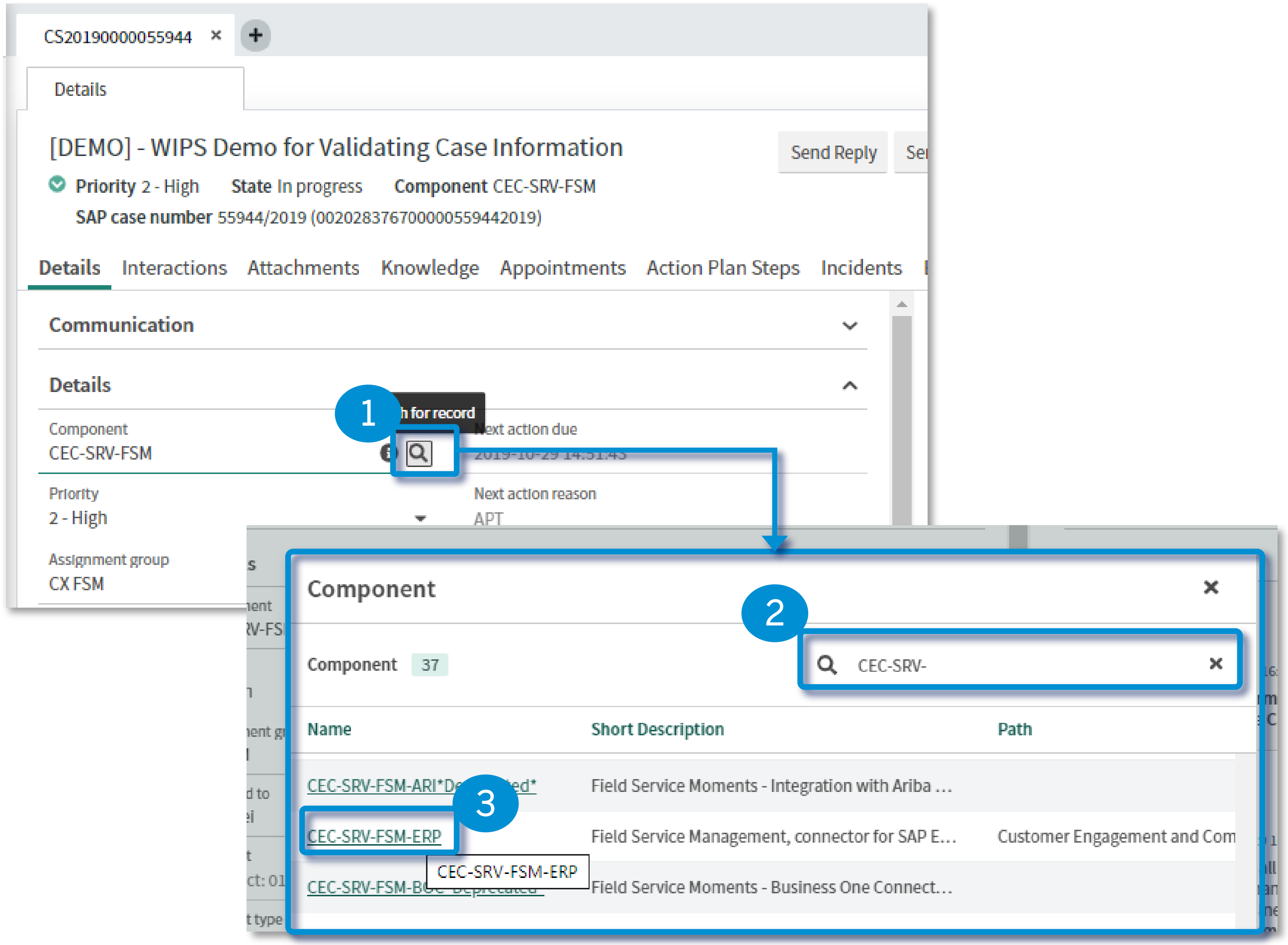
Step 2

Click **Save** to update the record. The **Assignment group** is automatically updated based on pre-defined routing rules.

Option A: Change component by typing the name in the field



Option B: Change component by searching via component list



1. Validate All Case Information

Case Management

Component

1c Inform the customer about the change of Component (if required)

Step 1

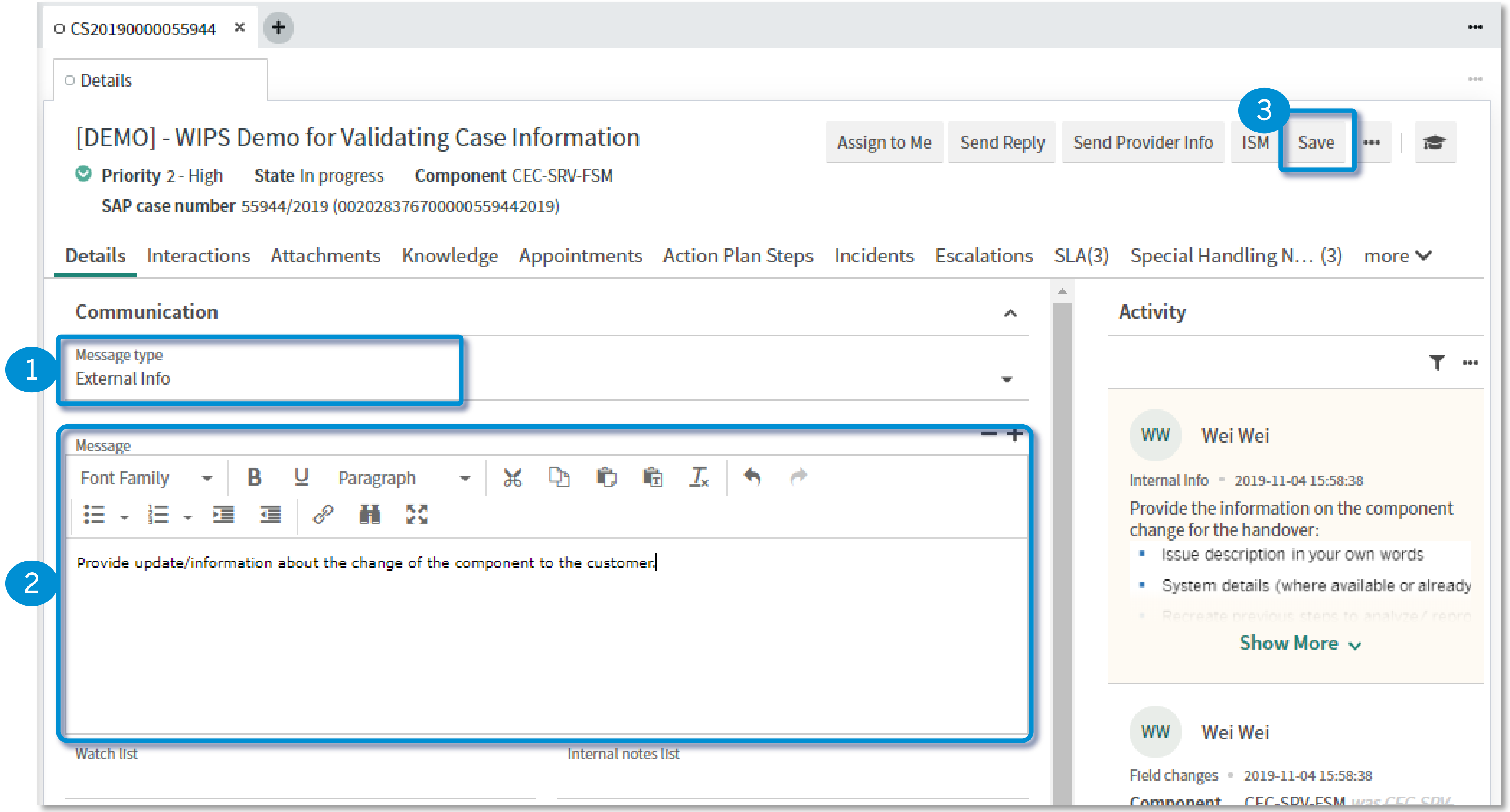
Select **External Info** as the **Message type**.

Step 2

Provide update to the customer in the **Message** field.

Step 3

Click **Save** to update the record.



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Contract and SLAs

SAP customers can purchase various [SAP support offerings](). Depending on the support programs purchased, the customers are entitled to various services that aim to monitor their SAP landscape and help prevent issues from occurring.

The system automatically populates the Next action due time and Next action reason according to the predefined SLA timeframes. The Support Engineer can also manually set the ORT.

Step 1

Check the **Contract type** in Details tab.

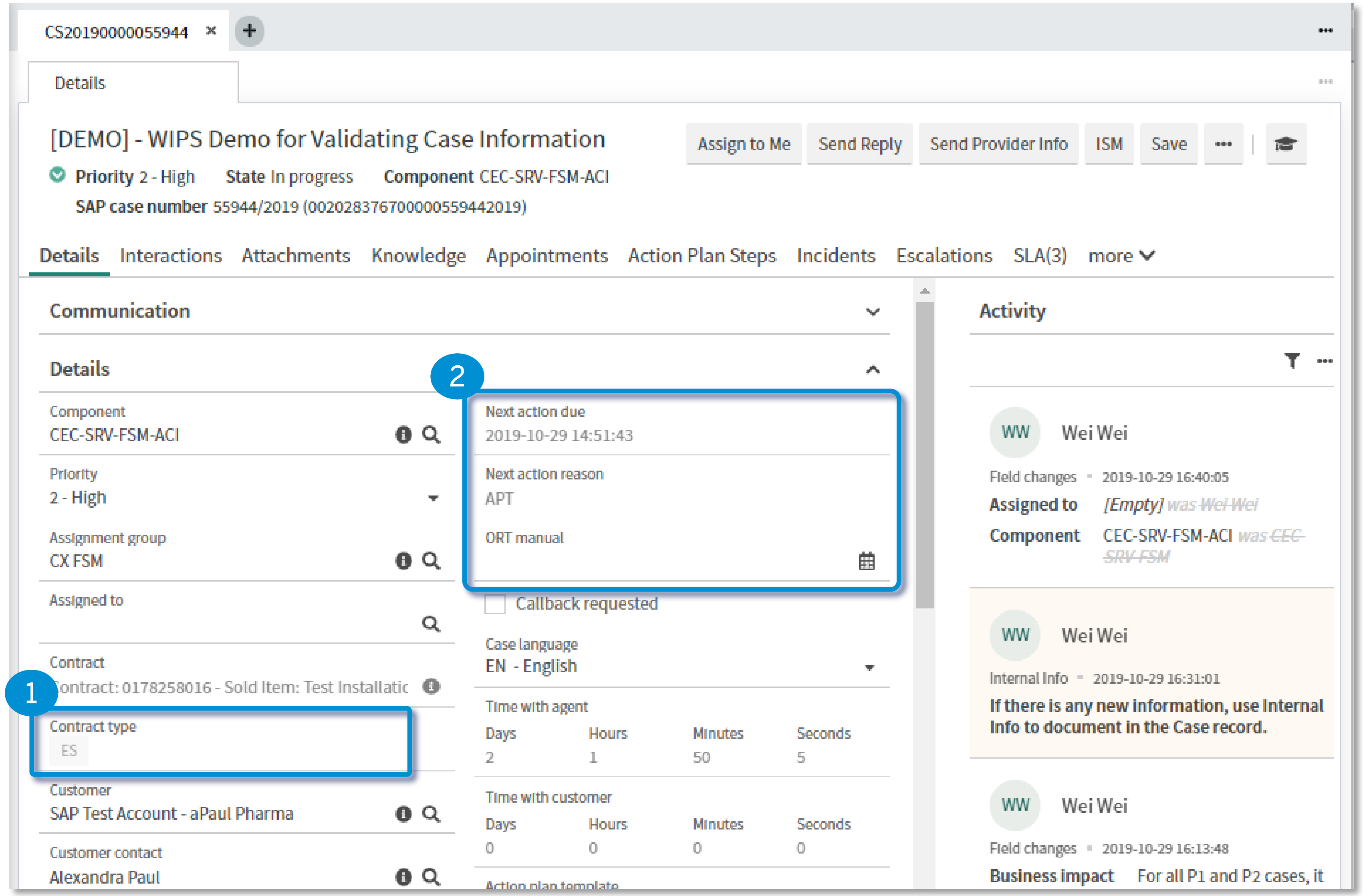
Step 2

Check **Next action due** and **Next action reason** to plan the next steps in order to adhere to the SLA requirement.

Notes

The contract types in NOW are:

- ES: SAP Enterprise Support
- STD: SAP Standard Support
- MA: SAP Max Attention
- PC: SAP Preferred Care On-Premise Edition
- CES: Enterprise Support Cloud Edition
- CPC: Cloud Preferred Care
- CPS: Cloud Preferred Success
- AA: SAP Active Attention
- SEC: Advanced Secure Support
- PSLE: SAP Product Support for Large Enterprise
- AE: SAP Active Embedded
- CPremium: Cloud Premium Care



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Contract and SLAs

Hint: How to manually change the ORT?

In case the Support Engineer needs longer time to provide response than the proposed default ORT, the Support Engineer can manually pause the ORT calculation by entering new date and time in the system. The ORT will then be paused for calculation until the newly set time. Once the set time is passed, the ORT calculation will continue.

Step 1

Click **ORT Manual** to open the dropdown list for date and time.

Step 2

Select the applicable **Date** and **Time** in the opened list.

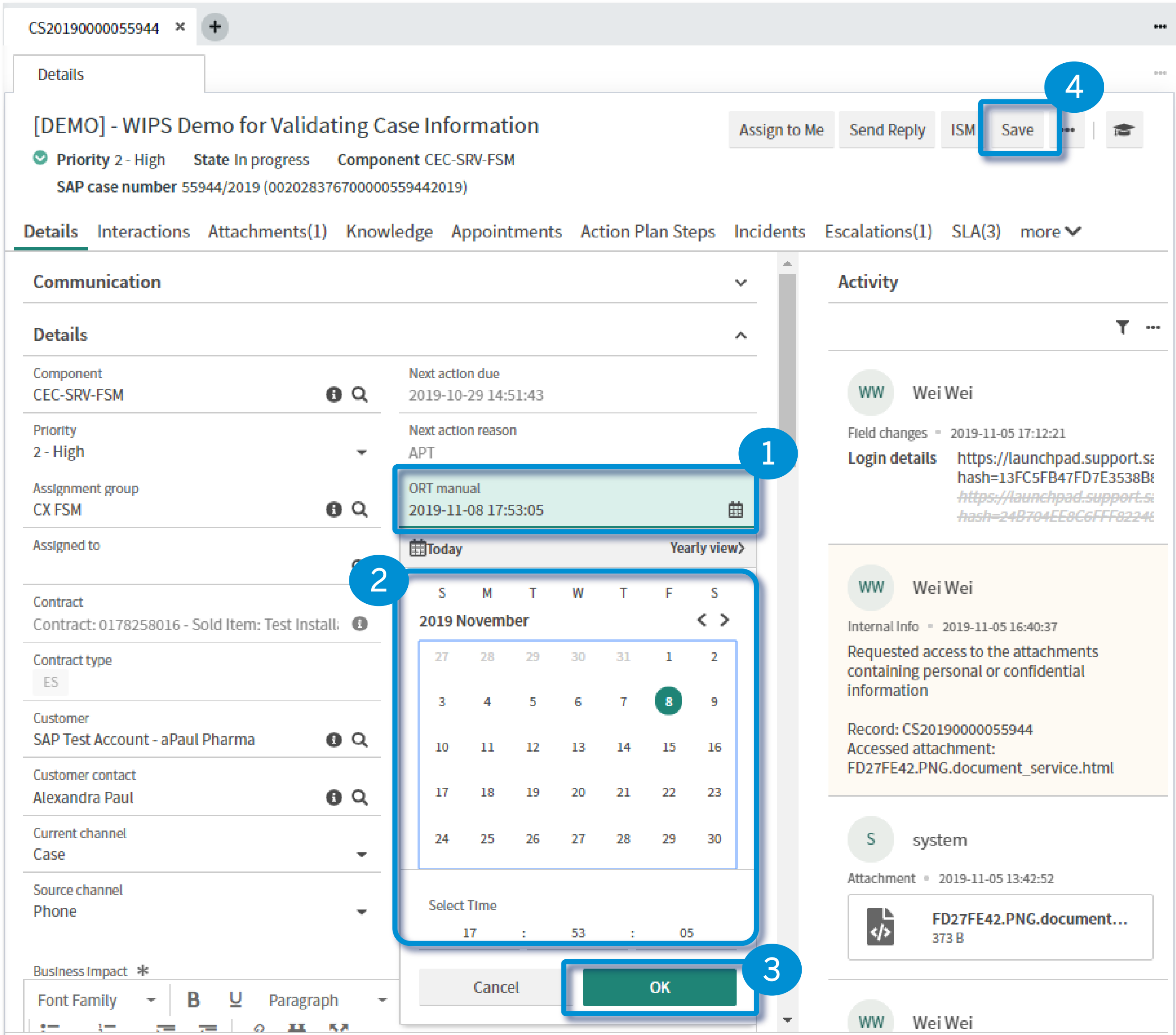
This is the new time until when the ORT is paused. After this newly set time, the ORT calculation will continue.

Step 3

Click **OK** to save the new date and time.

Step 4

Click **Save** to update the record.



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Contract and SLAs

The predefined durations and schedule patterns (e.g. 24x7 or office time) for each type of the SLA-relevant processing times are documented in the SLA tab, based on the Contract type and Priority selected for this Case.

Notes

More information on processing times can be found here.

Access to predefined SLA Tasks and definitions for this Case

Step 1

Go to **SLA** tab,

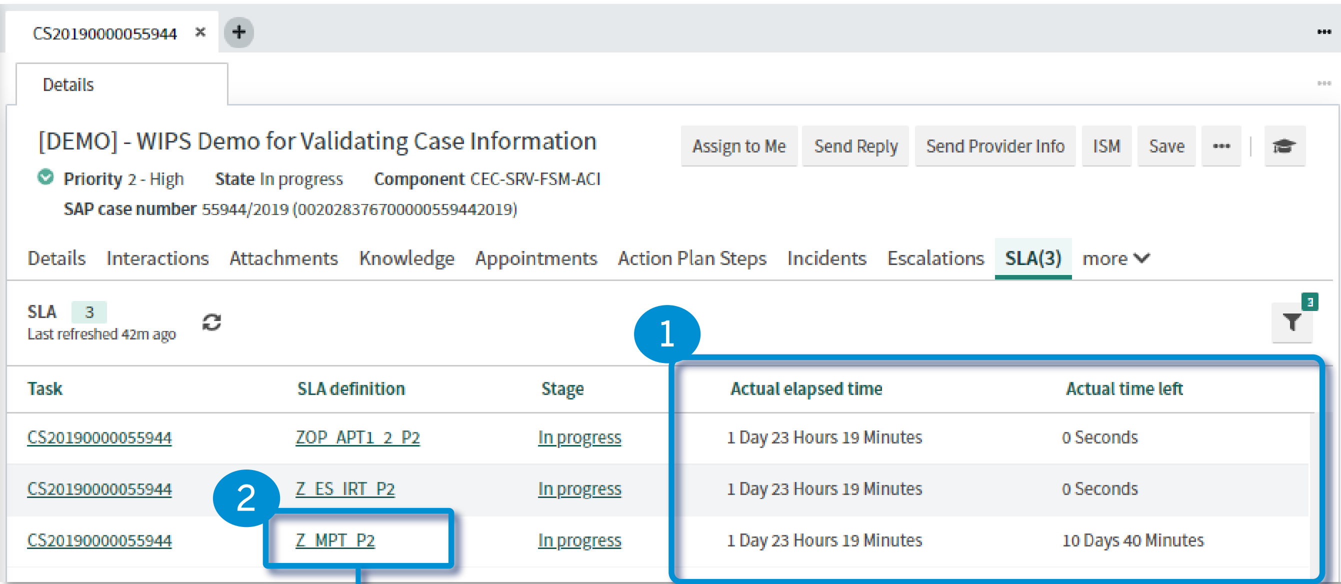
The **Actual elapsed time** and **Actual time left** for each processing time are displayed below.

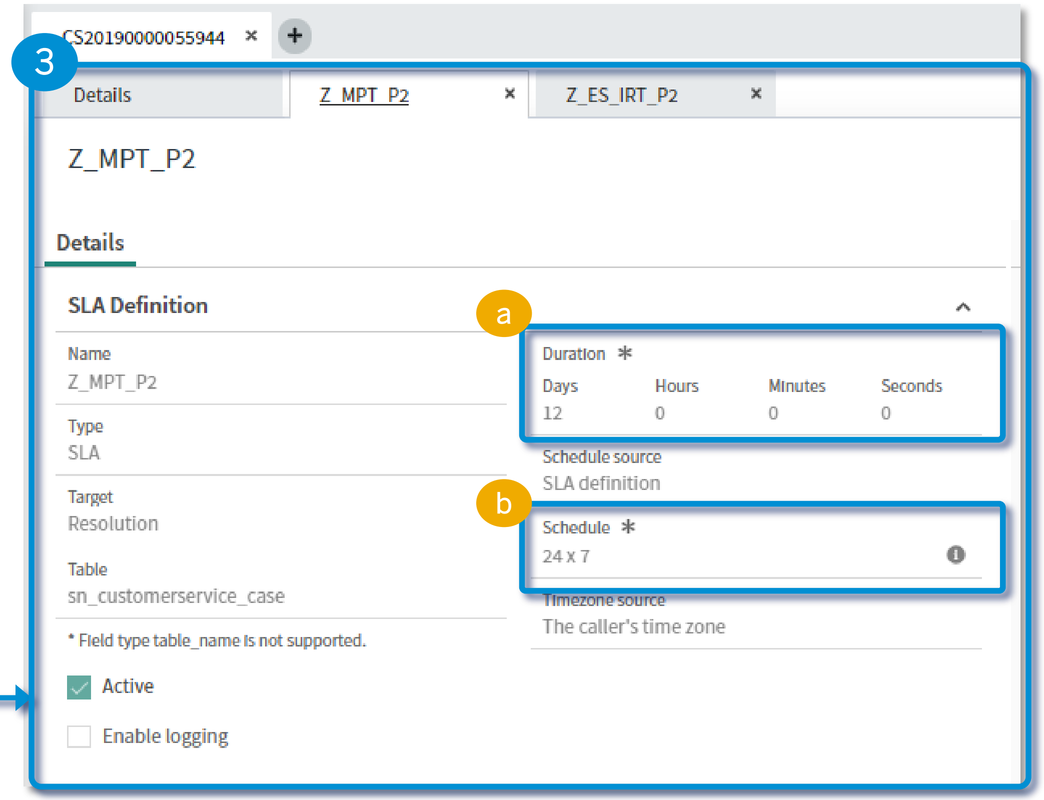
Step 2

Click each of the SLA definitions to open the entry.

Step 3

Check the predefined (a) **Duration** and (b) **Schedule** pattern of each processing time.





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Definitions of different processing times

IRT – Initial Reaction Time

- IRT is the time between a record arriving at SAP Support and the first qualified response provided to the customer.
- IRT is defined by the current priority of the Case AND the customer's contract.
- IRT should be met for all P1 and SLA relevant Cases.
- IRT is calculated based on real time (24x7) for P1 Cases and office hours for P2 – P4 Cases.

  Exceptions:

  1. Preferred Care contract, : Real time (24x7) calculation for P2
  2. Cloud contract CEC, CPC, and CPremium: real time (24x7) calculation for P2
- IRT is recalculated if the Case priority is changed (increased or decreased) as long as IRT has not been exceeded and not yet fulfilled.
- IRT can be stopped with the first **qualified response** from SAP to the customer by using **External Info** and clicking **Send** Reply.

Notes

A Qualified Response is an update to the customer that moves the issue towards a solution:

- **Minimum:** Check for completeness (Language, Component, Priority, Example Data, System Access/Log-on Data) and provide customer with the results of this initial check. Examples are asking for more information & informing progress of solution.
- Give technical information about the issue.
- Provide solution if possible.

MPT – Maximum Processing Time

- MPT is the maximum time a customer can expect a solution to be provided to the request. It is the time between record arriving at SAP Support and solution confirmed by customer, or if the case is automatically closed by the system.
- MPT has no contractual obligations.
- MPT is calculated based on real time (24x7).
- MPT is defined by the current priority of the case.
- MPT is paused when waiting for customer action or solution provided to customer.
- MPT stops when the Case is confirmed by the customer or automatically confirmed by the system

APT – Action Plan Time

- APT is the time that starts when a record arrives at SAP support, contractually requiring the creation of an Action Plan (AP) or when the priority of existing SLA relevant Case becomes APT contract relevant.
- APT is defined by the current priority of the Case AND customer's contract type.
- APT is paused when waiting for customer action or when solution is provided.
- APT can be stopped by Support Engineer if:
  1. an AP is created and sent to customer,
  2. the priority is lowered,
  3. solution is provided
  4. the case is confirmed and closed by customer.

ORT – Ongoing Response Time

- ORT is the time that starts after the IRT is fulfilled and continues until the next update is sent to the customer.
- ORT is defined by the current priority of the Case AND the customer's contract.
- ORT should be met for all Cases with any priority.
- ORT is calculated based on real time (24x7) for P1 and P2 and office hours for P3 and P4.
- ORT is paused when waiting for customer action or when solution is provided. When sending **External Info** using UI action **Send Reply**, the state changes to **Awaiting Info** and status changes to **Awaiting Requestor**.
- ORT is reset when case is sent back to SAP Support.
- ORT is stopped when the case is resolved or the State changes to Pending Release.

Notes

Manual ORT:

- If you need longer time than the default proposed ORT, you need to manually overwrite the ORT and continue providing updates to the customers as promised.
- If the ORT Date & Time are manually adjusted or set, the ORT will no longer be reset automatically to a time prior to the manually adjusted Date & Time.
- Click here to see how to manually set ORT

Contractual Obligations:

For Cloud Customers, SAP Support must update the customer through ongoing responses. Support Engineers must ensure that contractual aligned timelines are met.

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Agreed processing times (hours/days) by contract type for all priorities

Contract Type Priority	**PSLE & STD** (Standard Support)	**PSLE & STD including MA/AA[2]/AE** (Max-/Active Attention/ Active Embedded)	**PSLE & STD including MA/AA[2]/AE SLA** (SLA = Service Level Agreement)	**PSLE & STD including MA/AA[2]/AE PSLA** (PSLA = Premium SLA)	**PSLE, STD,ES Incl. PC** (PC = Preferred Care on-Premise)	**ES** (Enterprise Support)	**ES** (Enterprise Support) **including MA/AA[2]/AE**	**CES** (Enterprise Support Cloud Edition)	**CPC** (Cloud Preferred Care) **CPS[1]** (Cloud Preferred Success)	**Cpremium** (Cloud Premium Care) (For existing customers only. No new contracts anymore)
1 Very High	IRT: 1 h (RT)	IRT: 1 h (RT) APT: 4 h (RT)	IRT: 1 h (RT) APT: 4 h (RT)	IRT: 1 h (RT) APT: 4 h (RT)	IRT: 1 h (RT) APT: 4 h (RT)	IRT: 1 h (RT) APT: 4 h (RT)	IRT: 1 h (RT) APT: 4 h (RT)	IRT: 1 h (RT) APT: 4 h (RT) ORT: 1 h (RT)	IRT: 1 h (RT) APT: 4 h (RT) ORT: 1 h (RT)	IRT: 1 h (RT) APT: 4 h (RT) ORT: 1 h (RT)
2 High	IRT: 8 h (OT)	IRT: 8 h (OT)	IRT: 4 h (OT)	IRT: 2 h (RT) APT: 3 BD (OT)	IRT: 2 h (RT) APT: 3 BD (OT)	IRT: 4 h (OT)	IRT: 4 h (OT)	IRT: 4 h (RT) ORT: 6 h (RT)	IRT: 2 h (RT) APT: 36 h (RT)BD ORT:	IRT: 2 h (RT) ORT: 6 h (RT)
3 Medium	IRT: 30 h (OT)	IRT: 30 h (OT)	IRT: 30 h (OT)	IRT: 4 h (OT)	IRT: 4 h (OT)	IRT: 30 h (OT)	IRT: 30 h (OT)	IRT: 8 h (OT) ORT: 3 BD (OT) ND ORT: 10 BD (OT) PD	IRT: 4 h (OT) ORT: 3 BD (OT) ND ORT: 10 BD (OT) PD	IRT: 4 (OT) ORT: 3 BD (OT) ND ORT: 10 BD (OT) PD
4 Low	IRT: 60 h (OT)	IRT: 60 h (OT)	IRT: 60 h (OT)	IRT: 8 h (OT)	IRT: 8 h (OT)	IRT: 60 h (OT)	IRT: 60 h (OT)	IRT: 2 BD (OT) ORT: 7 BD (OT) ND	IRT: 8 h (OT) ORT: 7 BD (OT) ND	IRT: 8 h (OT) ORT: 5 BD (OT) ND

Legend:

- **Contractually agreed SLAs (contractual obligation) – SLA must be adhered**
- **Internally agreed SLA (no contractual obligation) – adherence is expected**
- **Internally agreed SLA (no contractual obligation) – adherence is optional**
- **RT** = Real Time (24x7)
- **OT** = Office Time (8am – 6pm)
- **BD** = Business Day (8 hours)
- **ND** = Non Defect
- **PD** = Product Defect

Remarks

- For any of above customer contracts in **combination with contract status "SL"** (Service Level) be aware that SLAs must be adhered to for all priorities.
- Please note that additional **contract label "SEC"** (Secure Support) doesn't have any further SLA implications. SLAs must be adhered according to ES, MA or AE only. Contractual agreed handling instructions for SEC incidents will be given via Bulletin Board information.
- **Contract ORSL** (Ongoing Response Service Level) for customer Nestlé only. Nestle should be informed about ongoing actions on a regular basis.
  Field "ORT" in Dates block informs about next ORT planned end date.
- Contract types **MA4** (Accelerated Incident Handling) and **xMA4** (Extended Accelerated Incident Handling) aren't SLAs relevant and doesn't carry incident handling work instructions.
- **IRT for Preferred Care P2's are real time** and **APT for P2's is office time**.
- [1] Cloud Preferred Success (CPS) will replace CPC (new customers or CPC renewals)
- [2] Active Attention AA will replace Active Embedded AE (new customers or AE renewals)

Notes

What if the contracts are not covered here:

The processing times for each priority level and contract type can also be accessed via Case. Click here to see how to check predefined processing times for specific contract(s) in NOW.

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SLA definitions for all priorities

The predefined durations and schedule patterns for SLA-relevant processing times based on the specific contract type and/or combination of different contracts are documented for all priority levels in NOW and can be accessed in the contract record.

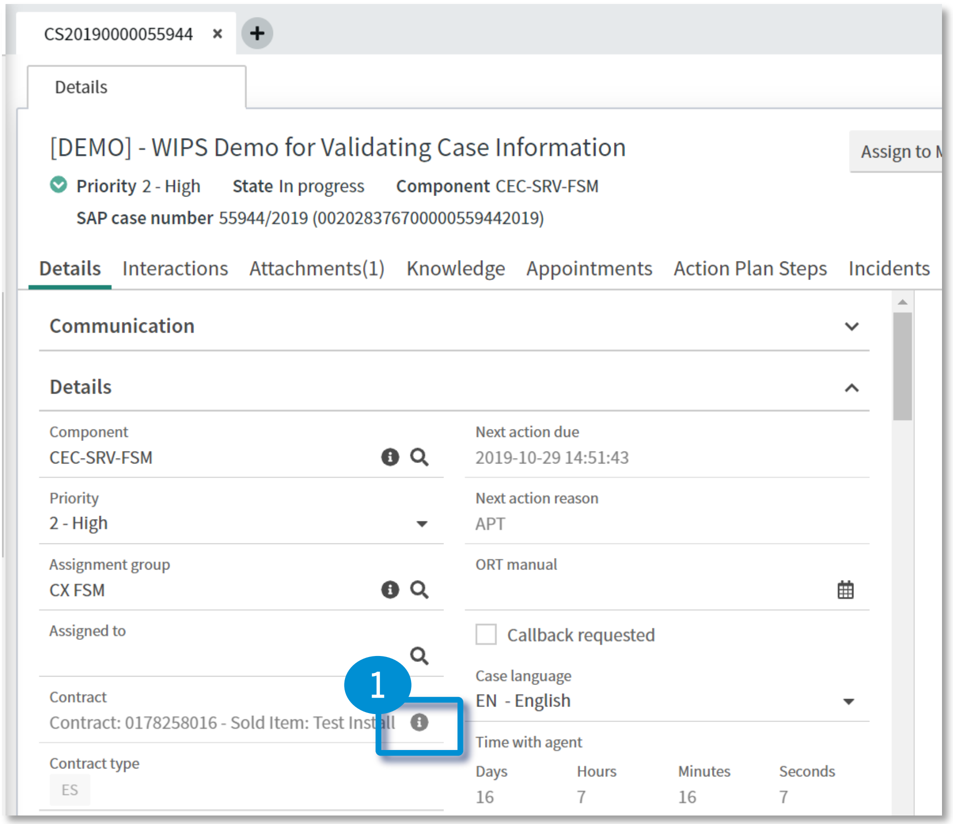
Notes

More information on processing times can be found here.

Access to predefined SLAs for all priority levels for this contract type/combination

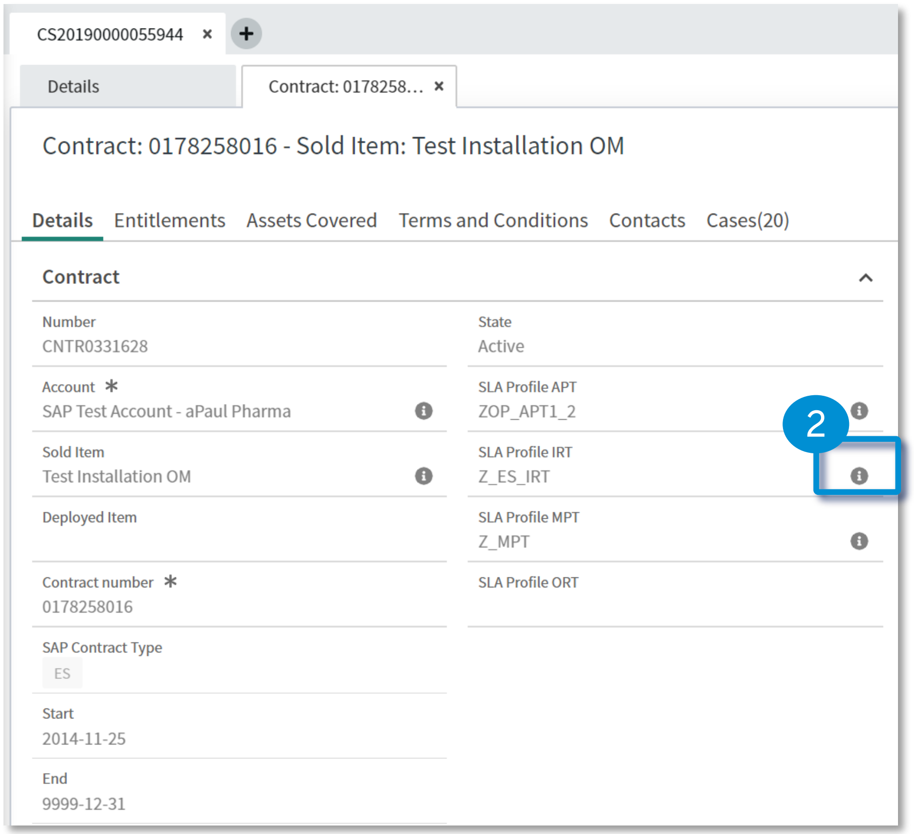
Step 1

Click the **Information Icon** next to the **Contract** field in the **Details** section to open the record for this contract in a new tab.



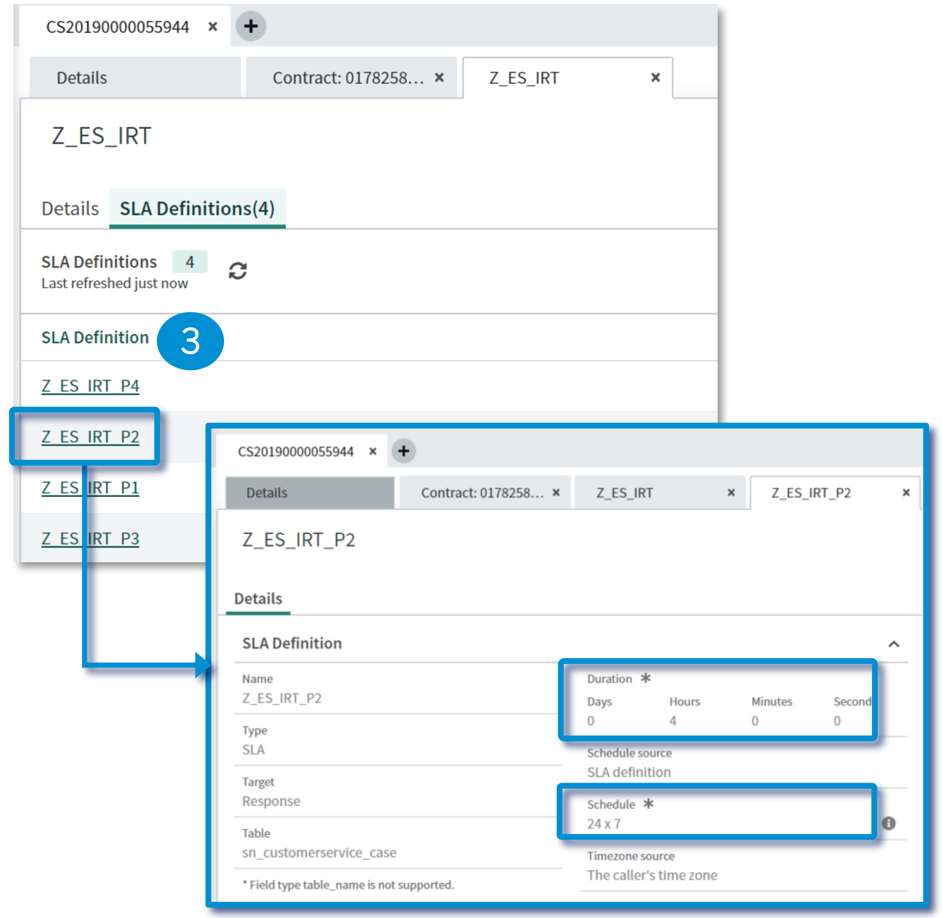
Step 2

Click the field named **SLA Profile XXX** (e.g. SLA Profile APT. SLA Profile IRT, etc.) to open the SLA profile for all priority levels of this contract.



Step 3

Click one of the **SLA Definition** entries to see the duration and schedule for this priority. The priority level is indicated as a suffix (e.g. P1, P2) at the end of the naming.



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Contract and SLAs

Hint: How to have visual display of SLA calculation?

Step 1

Click the top-right button with your name initials.

Step 2

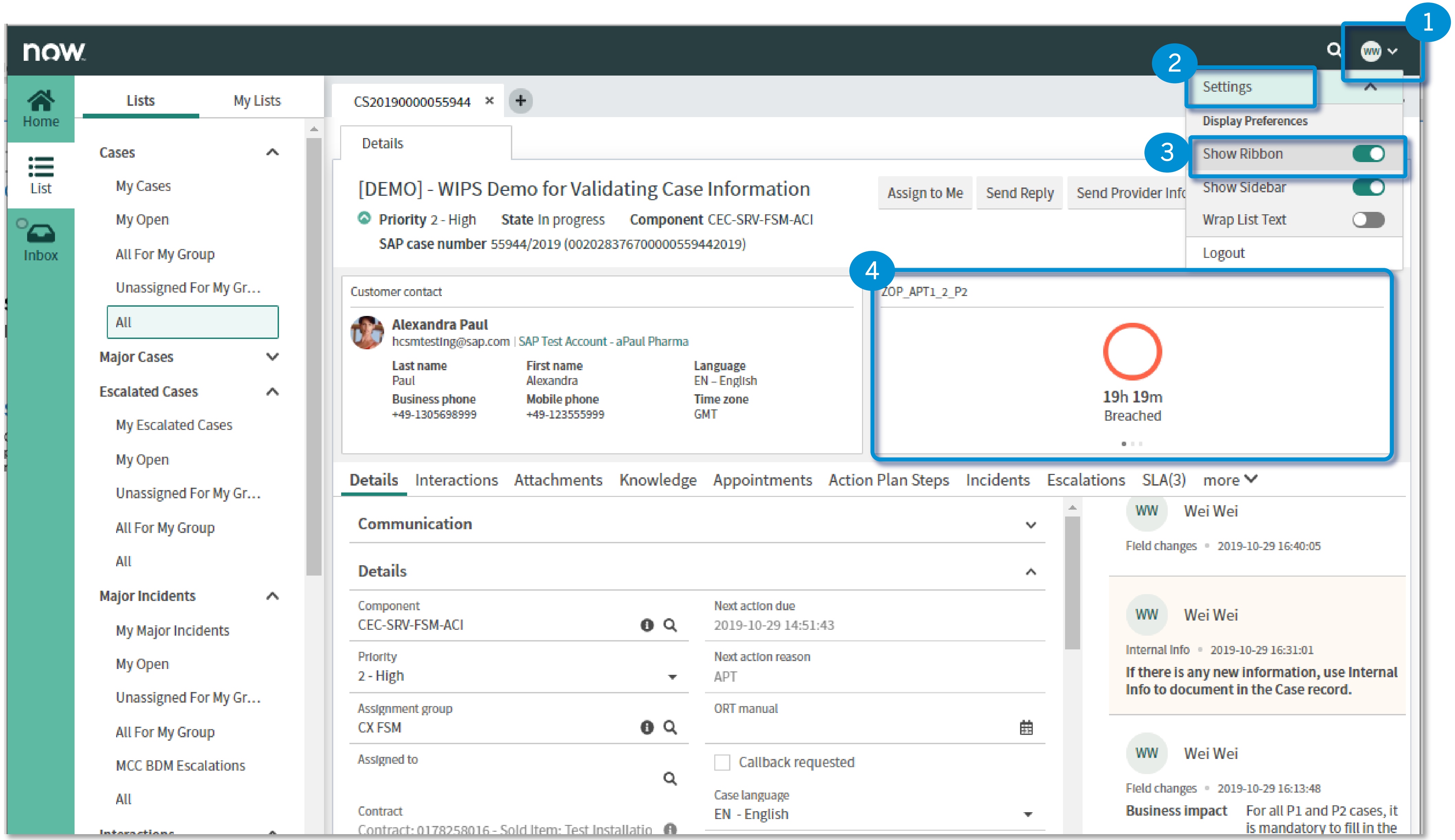
Click **Setting**.

Step 3

Turn on **Show Ribbon**.

Step 4

The SLA calculation will be visually displayed next to the Customer Contact section.



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EUDP Restriction

EUDP Remote Access restrictions do NOT apply to employees that are physically located within the EU and EFTA areas.

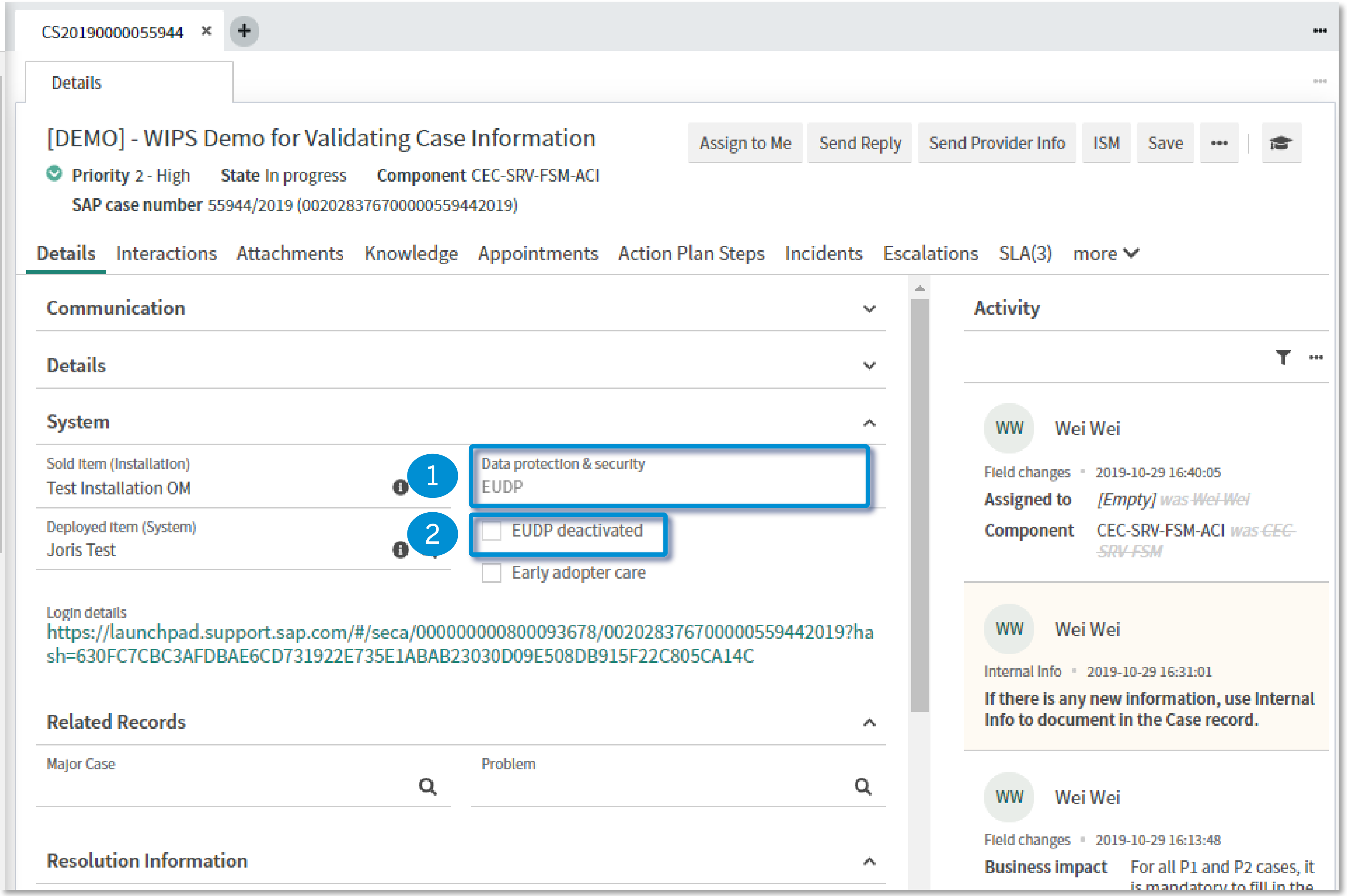
Step 1

The type of **Data protection & security** is displayed in the **System** section and is prefilled by the Installation.

Step 2 (if necessary)

In case of emergency and the customer requires immediate support, the Support Engineer can request the customer to deactivate the EUDP restriction.

Once the customer deactivates the restriction, the **EUDP deactivated** box will be automatically checked.



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EUDP Restriction

Country Whitelist for Remote and Attachment Access

European Free Trade Association (EFTA) states (green):

Liechtenstein Iceland Norway Switzerland

Member states of the European Union (blue):

Austria	Belgium	Bulgaria	Croatia
Cyprus	Czech Republic	Denmark	Estonia
Finland	France	Germany	Greece
Hungary	Ireland	Italy	Latvia
Lithuania	Luxembourg	Malta	The Netherlands
Poland	Portugal	Romania	Slovakia
Slovenia	Spain	Sweden	~~United Kingdom~~

Notes

- EU DP Remote Access restrictions do basically not apply to employees physically located in one of the above countries.
- **Since the Brexit on January 31st 2020 the UK is not part of the EU anymore. However until Dec 31st 2020 the UK is in a transition period in which the remote access - & attachment handling rules keep the same for UK-based engineers.**

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1. Validate All Case Information

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Early Adopter Care Program and BETA Shipment

The system automatically recognizes whether the customer has been enrolled in the Early Adopter Care program based on the name of the customer and reflects the enrollment with EAC flag on the Case form. Cases regarding Beta Shipment (BS) are identified by designated component.

Both EAC and BS related Cases are reflected in queue with higher work priority.

Notes

BETA Shipment:

Beta-Shipment cases are ONLY classified via the short description: **BETA[Solution][Release]**

Goals of Early Adopter Care Program

- To connect customers with software and technology in order to help them simplify, innovate, and digitize quickly;
- To provide access to leading edge software functionality while minimizing the risk of being an early adopter;
- To get early customer feedback;
- To improve solution quality;
- To showcase customer success with SAP's latest innovations;
- EAC is applied both to products in restricted and unrestricted availability.

How to Identify Participant

The enrollment in the EAC program is displayed as a checkbox **Early Adopter Care** in the **System** section in the **Details** tab.

The enrollments in EAC and BS are also reflected in the Case's Subject when customers create Case records in the Launchpad.

NOTE for Classification in Subject Field:

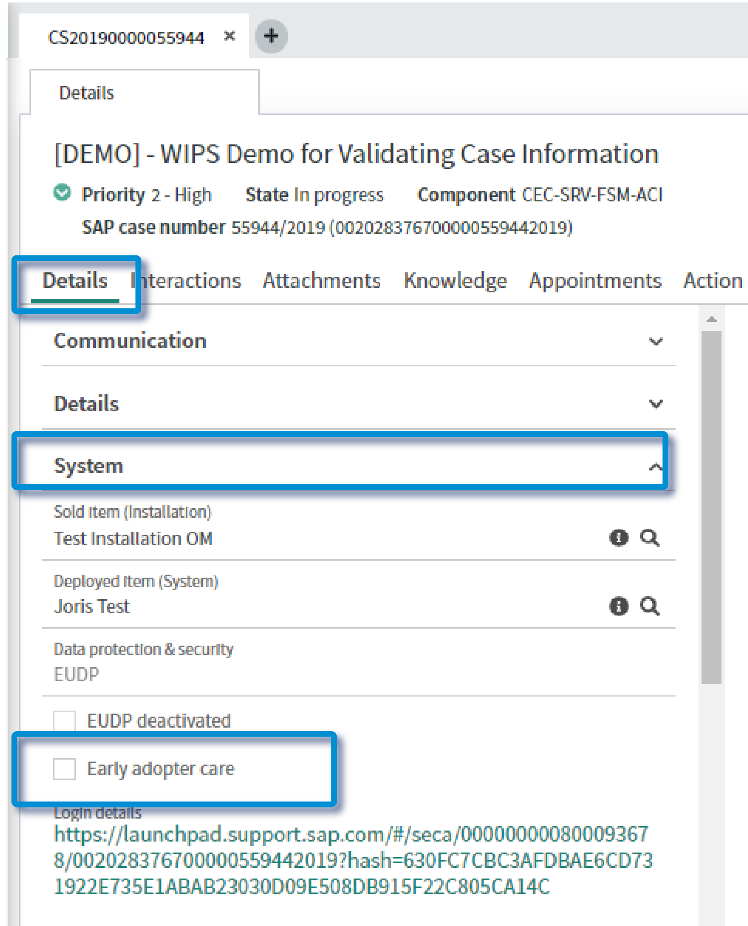
Customer MUST follow the naming convention for Case's Subject field below for the classification when creating the Case.

EAC: EAC[Solution][Release]

BS: BETA[Solution][Release]

In Case of Missing Flag:

If this flag is missing for the EAC participant's Case record, the Support Engineer MUST tick off the checkbox **Early Adopter Care** for the customer.



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Case Management

Early Adopter Care Program and BETA Shipment

The system automatically recognizes whether the customer has been enrolled in the Early Adopter Care program based on the name of the customer and reflects the enrollment with EAC flag on the Case form. Cases regarding Beta Shipment (BS) are identified by designated component.

Both EAC and BS related Cases are reflected in queue with higher work priority.

Handling of EAC Case

EAC cases should receive special attention in the case processing:

- If the EAC flag is missing when customer opens the Case record, Support Engineer has to set flag manually by ticking off the checkbox **Early Adopter Care**
- EAC cases follow the standard routing procedures and thus have no specific SLAs
- EAC cases related to "traditional" functionality will be handled by Support Engineer as any other normal cases
- Nexus or EAC Back Office representative can help if an issue cannot be fixed in a timely manner
- Once the EAC program phase ends, the standard SAP support processes apply

Forwarding of EAC Case

The Support Engineer is responsible for solving the EAC Cases, However, this is additionally backed up with the help from EAC Back Office and development teams.

- For SAP Business Suite and NW Solutions, Cases related to the new functionalities must be forwarded to the next level within 1 day
- For BI, EIM & EPM cases, Support Engineer Support only owns the Case. These Cases cannot be forwarded to the development team without an issue being reproduced unless there is special agreement with the development team or EAC Back Office
- If an issue cannot be resolved in a timely manner, the Support Engineer can request help from Nexus or EAC Back Office representative

Notes

Related Information:

- EAC Flag FAQ Document (FAQ document released for customers)
- SAP Note: EAC Flag (released for customers)
- SAP Early Adopter Care on the corporate portal
- SAP Early Adopter Care on SAP Support Portal
- Early Knowledge Transfer on SAP Support Portal

1. Validate All Case Information

Case Management

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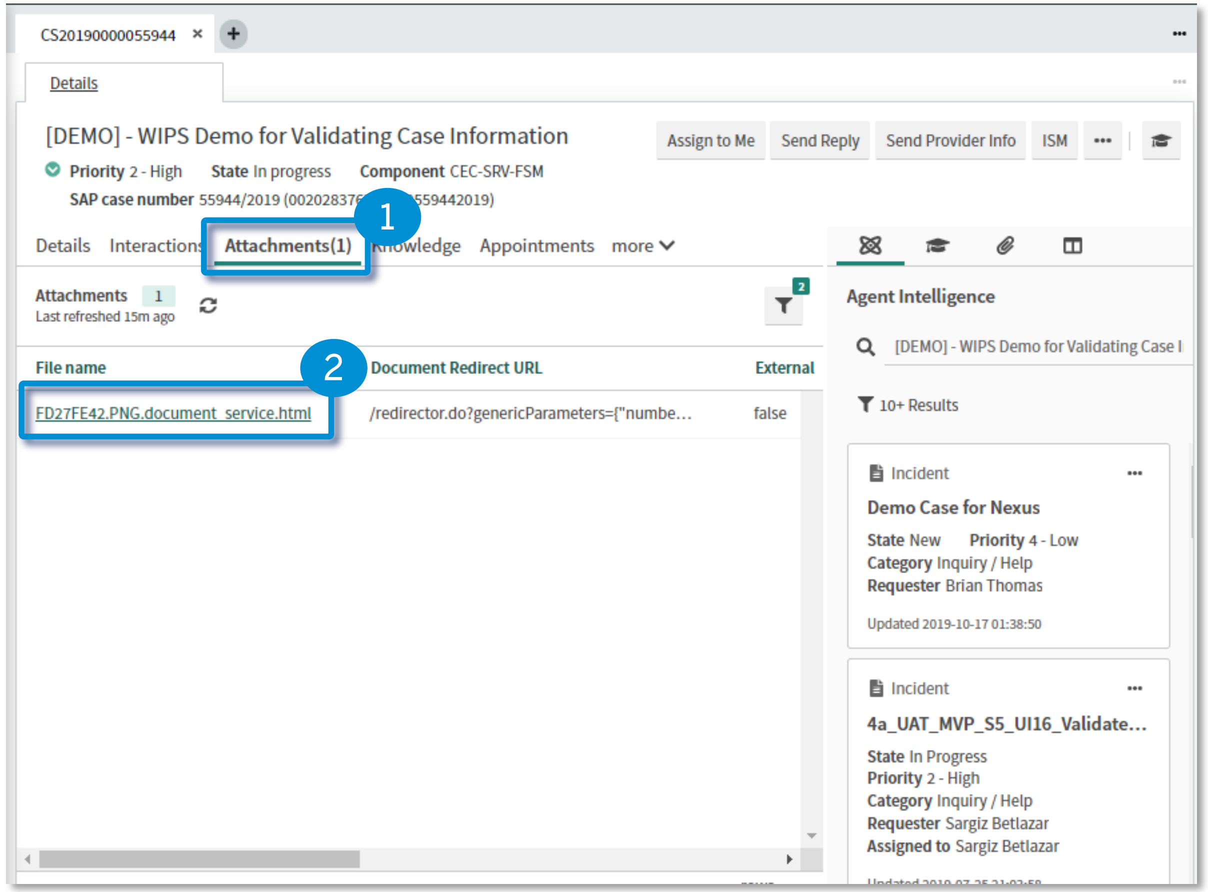
Attachment

Customers can attach files when creating the Case to provide more information of the issue reported. The Support Engineer needs to ensure that the attachments have been correctly classified by the customer.

Step 1

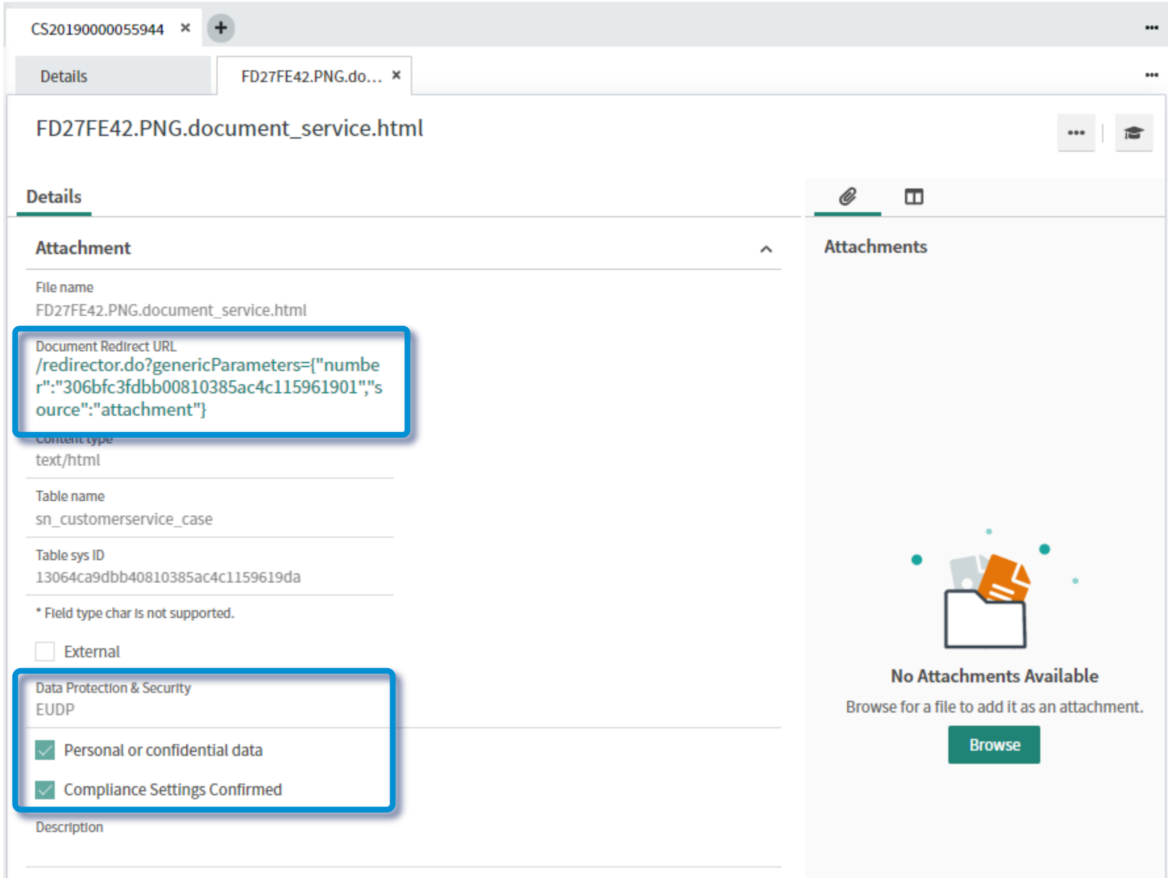
Go to **Attachments** tab and click the **File name** to open the details of the attachment.



Step 2

Click **Document Redirect URL** to open the attachment.

NOTE: Pay attention to the classification of **Personal or confidential data** and **Data Protection & Security** setting.



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1. Validate All Case Information

Case Management

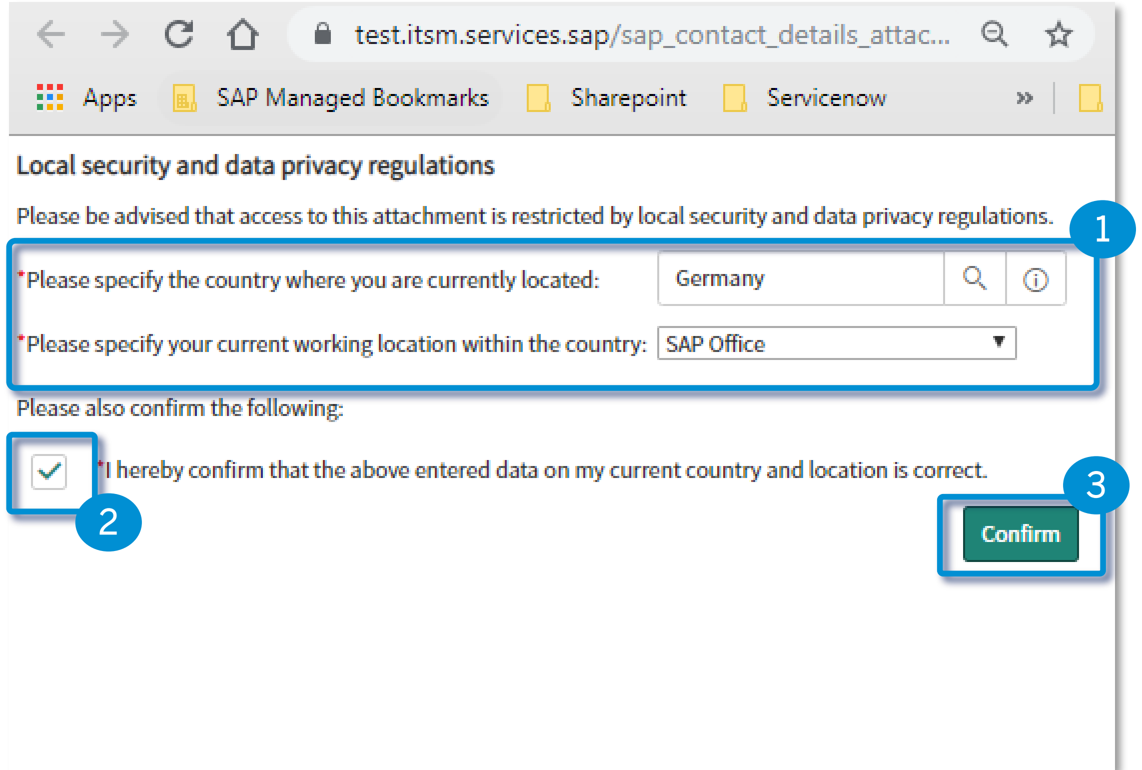
Attachment

Customers can attach files when creating the Case to provide more information of the issue reported. The Support Engineer needs to ensure that the attachments have been correctly classified by the customer.

Step 3

Fill in the information in the new window for the local security and data privacy regulations. This applies to attachments that have EUDP restrictions.

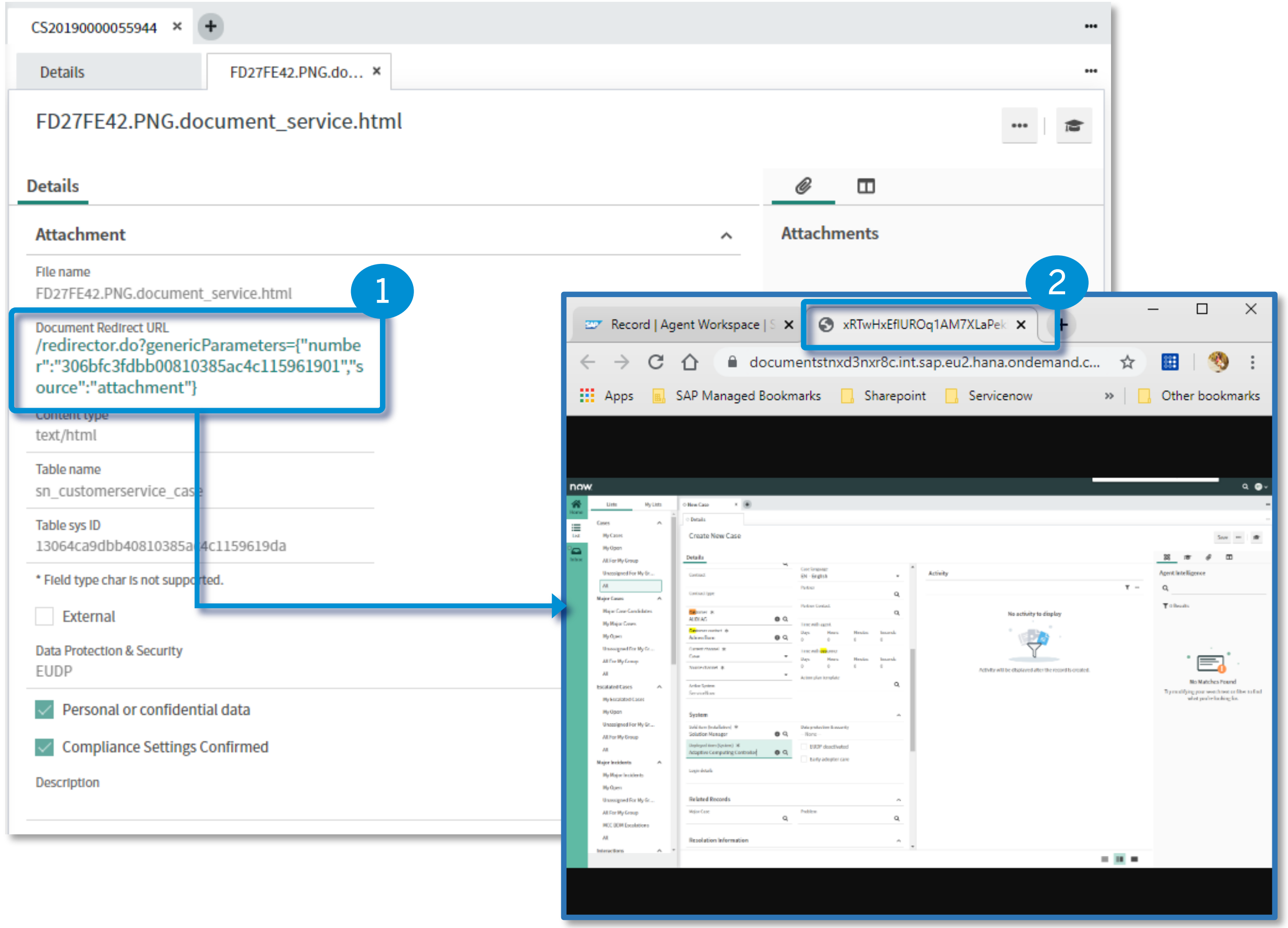
Once confirming the entered data, you may close this browser tab.



Step 4

Go back to the browser where the Case record is opened. Click Document Redirect URL again to open the attachment.

The attachment will be displayed in a new window, with zoom-in functionality.



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2. Create Service Request (if necessary)

Case Management

What is Service Request?

Service request is a formal request from a user for routine business function such as information and advice, standard change (e.g. password reset, workstation installation for new user), and access to IT services, using a predefined service catalog with approval steps. Service request does not include configuration change in the application.

Detailed work instructions on how to create Service Request will be available soon

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3. Request for Escalation (if necessary)

Case Management

Notes

Instructions on how to provide information using Escalation records here.

Scenario 1: Critical Incident Situation

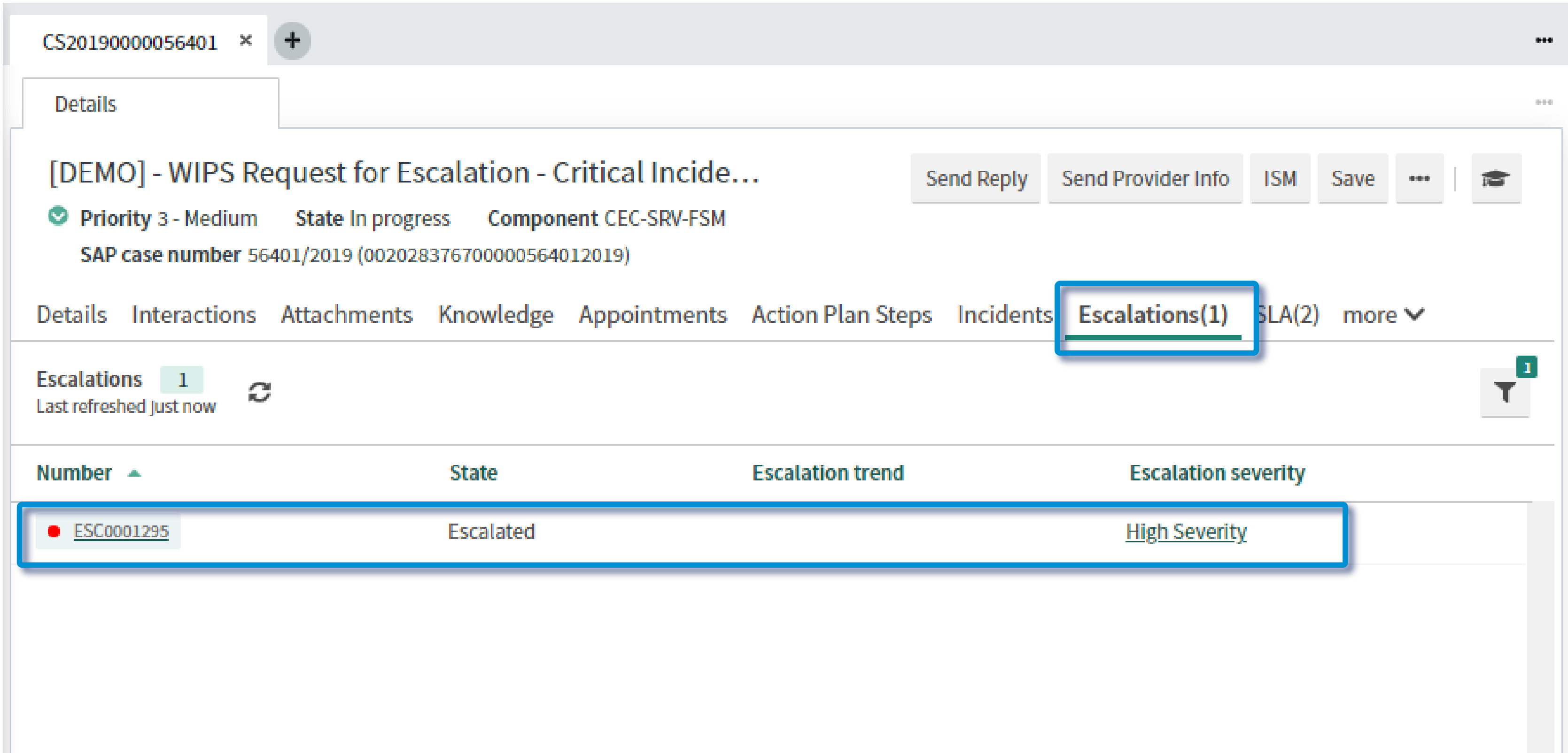
Critical Incident Situation is a scenario when the customer contacts the Customer Interaction Center (CIC) to request for the escalation of existing Case. In this scenario, the Case only has the Escalation record associated. This is managed by the Critical Incident Management (CIM) team.

Escalation Record Creation by CIM Manager On Duty

When the customer contacts the Customer Interaction Center for escalation, a Critical Incident Management request is triggered via the MCC SOS App. The ICP service request is then created.

Once the ICP service request is approved by the CIM Manager On Duty (MoD), the MoD manually creates the Escalation record for this specific Case in NOW.

The Escalation record is displayed in the **Escalation** tab of the Case.



Important Notes

The Escalation record can ONLY be closed by the **CIM team**. However, a Case can still be closed with Escalation record open. Once the Case is closed, the Escalation record will be automatically de-escalated.

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3. Request for Escalation (if necessary)

Case Management

Notes

Instructions on how to provide information using Escalation records here.

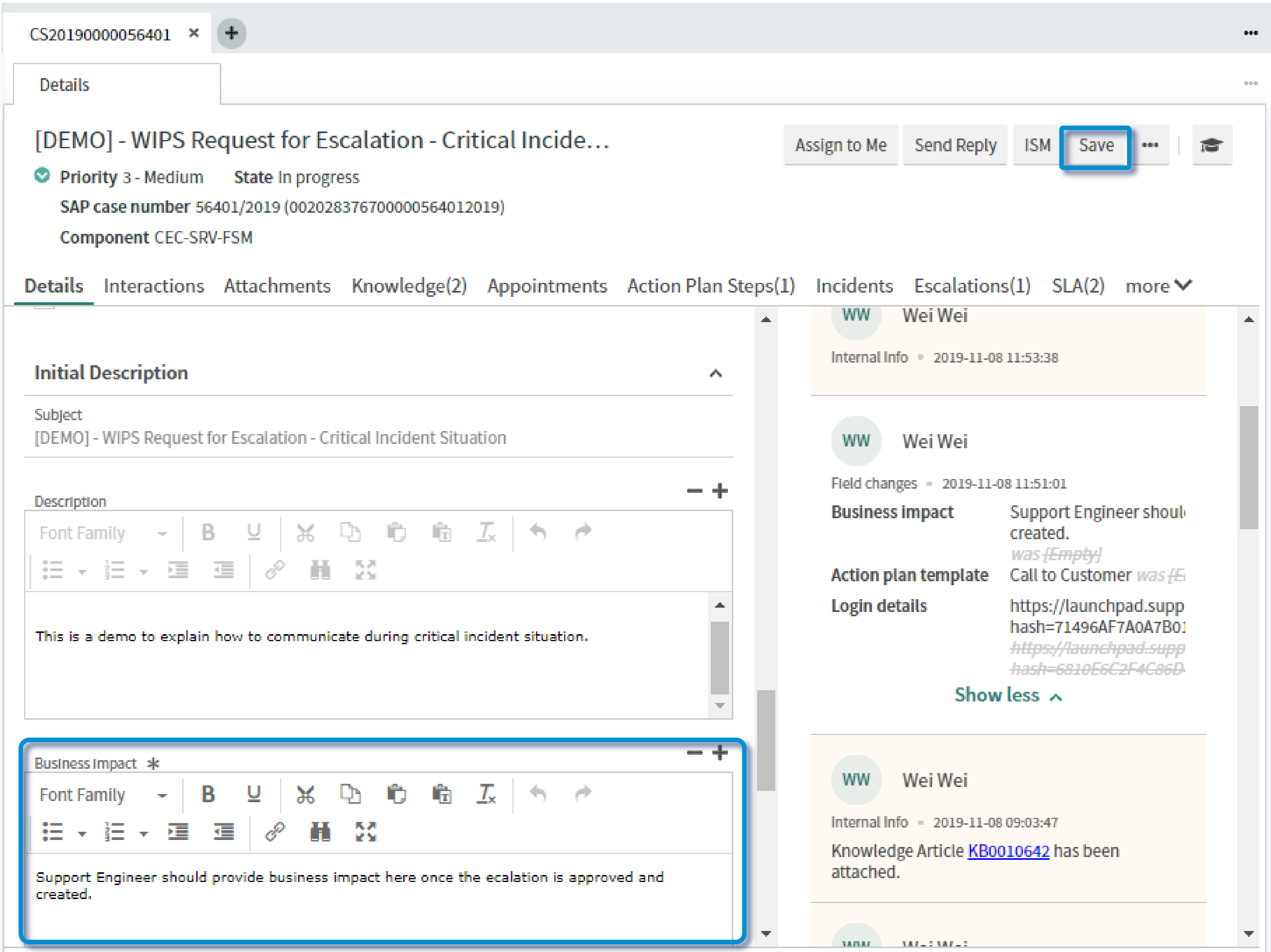
Scenario 1: Critical Incident Situation

Critical Incident Situation is a scenario when the customer contacts the Customer Interaction Center (CIC) to request for the escalation of existing Case.

Step 1

Once the Escalation record is created, the Support Engineer is required to provide business impact in the **Business Impact** field in the **Details** section.

Click **Save** to update the record.



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3. Request for Escalation (if necessary)

Case Management

Notes

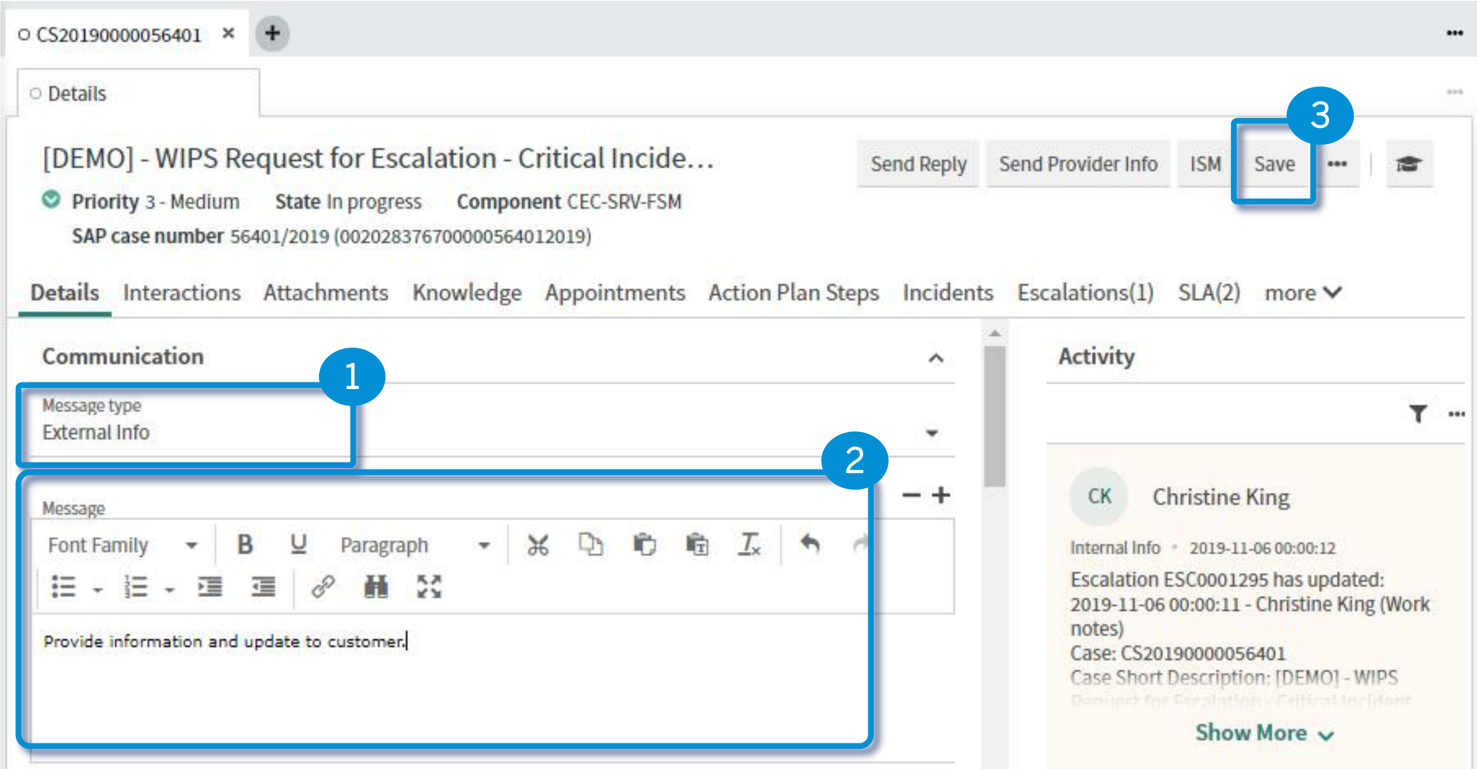
Instructions on how to provide information using Escalation records here.

Scenario 1: Critical Incident Situation

Critical Incident Situation is a scenario when the customer contacts the Customer Interaction Center (CIC) to request for the escalation of existing Case.

Step 2

Support Engineer continues working in the current case to communicate with the customer using **External Info** as the **Message type** **in the Case** if necessary. Click **Save** to update the record.



3. Request for Escalation (if necessary)

Case Management

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Notes

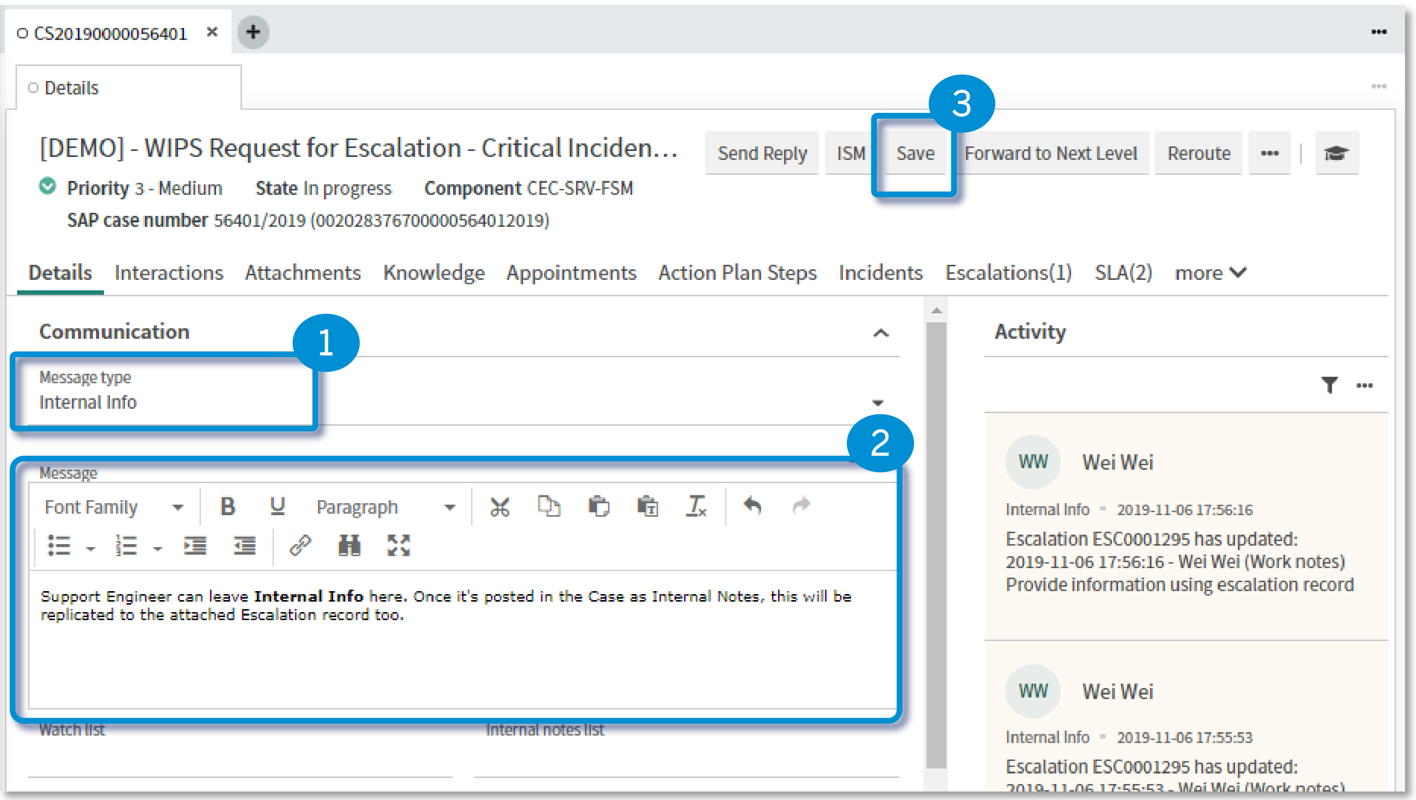
Instructions on how to provide information using Escalation records here.

Scenario 1: Critical Incident Situation

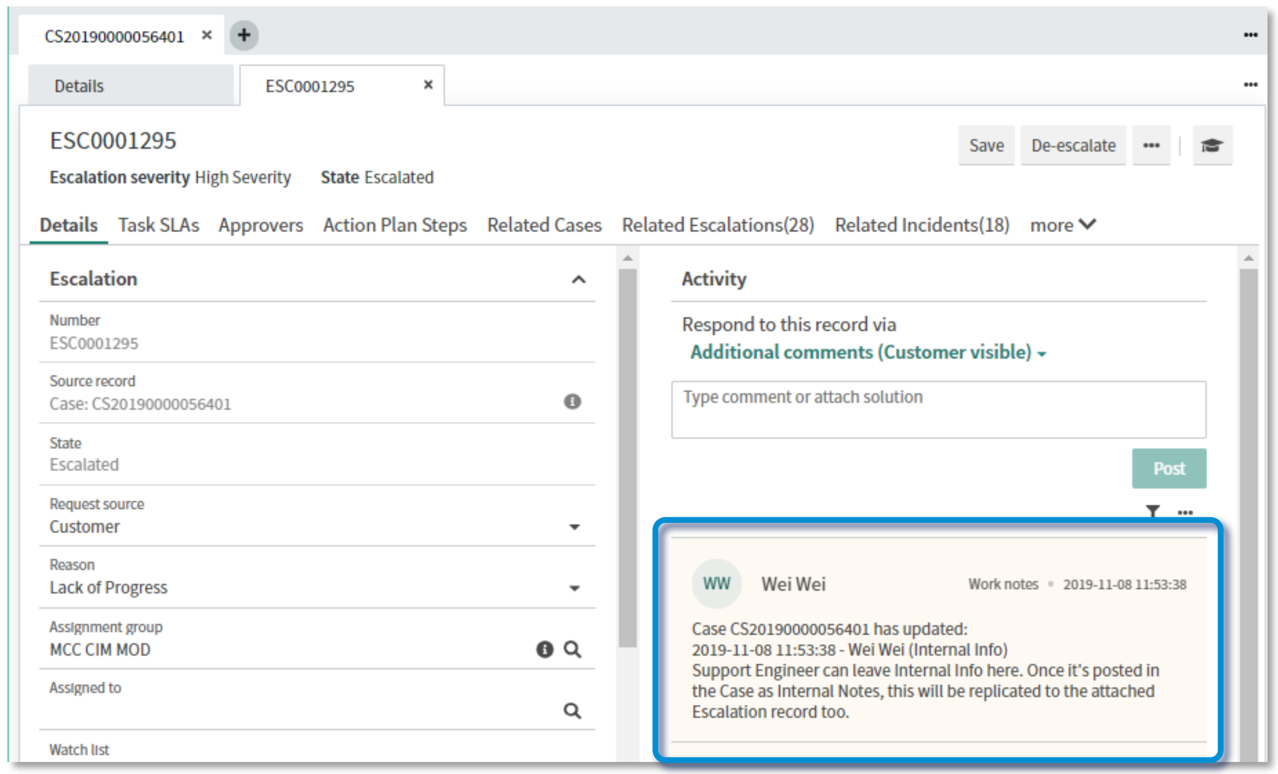
Critical Incident Situation is a scenario when the customer contacts the Customer Interaction Center (CIC) to request for the escalation of existing Case.

Step 3

The Support Engineer is recommended to use **Internal Info** as the **Message type** **in the Case** to communicate with the MCC processors when necessary.



Internal Info sent from Case is displayed in the **Activity** stream of the Escalation record of this Case.



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3. Request for Escalation (if necessary)

Case Management

Scenario 2: Business Down Situation

Business Down Situation is a scenario of service disruption when the customer's business service is significantly impacted and requires urgent treatment usually within a few hours. A Business Down Situation can be reported by both customers (via Case) and SAP employees (via Incident).

Detailed work instructions on how to request escalation of a Business Down Situation will be available soon.

3. Request for Escalation (if necessary)

Case Management

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Scenario 3: Critical Customer Situation

Critical Customer Situation is a scenario when the customer reports critical situation on one or more issues that have or might have an impact on customers' or SAP's business and require extraordinary management above and beyond SAP standard processes.

Detailed work instructions on how to request escalation of a Critical Customer Situation will be available soon.

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Communication During Escalation

Case Management

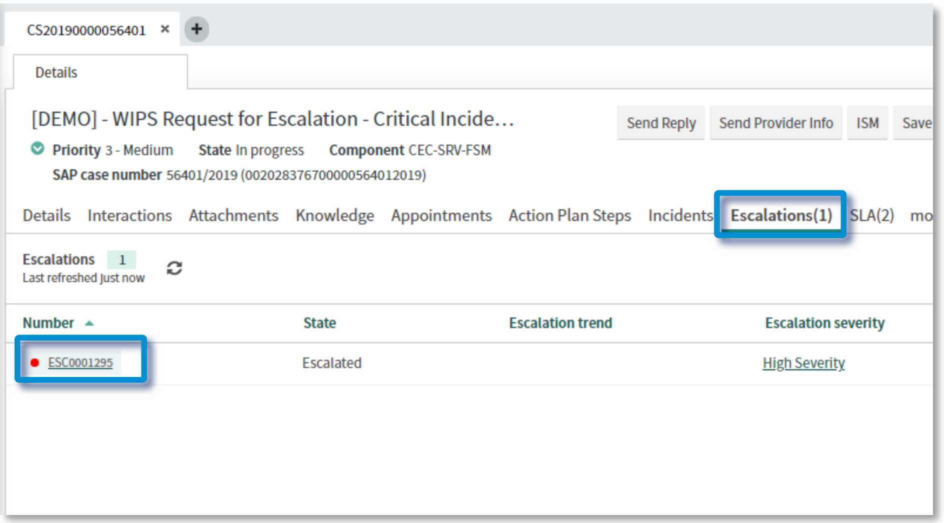
How to communicate with escalation processing teams using Escalation records

The Support Engineer can also use **Work notes within the Escalation records** to communicate with the escalation processing teams.

Information provided in the Escalation record is displayed in the Activity stream of both Case and Escalation records.

Step 1

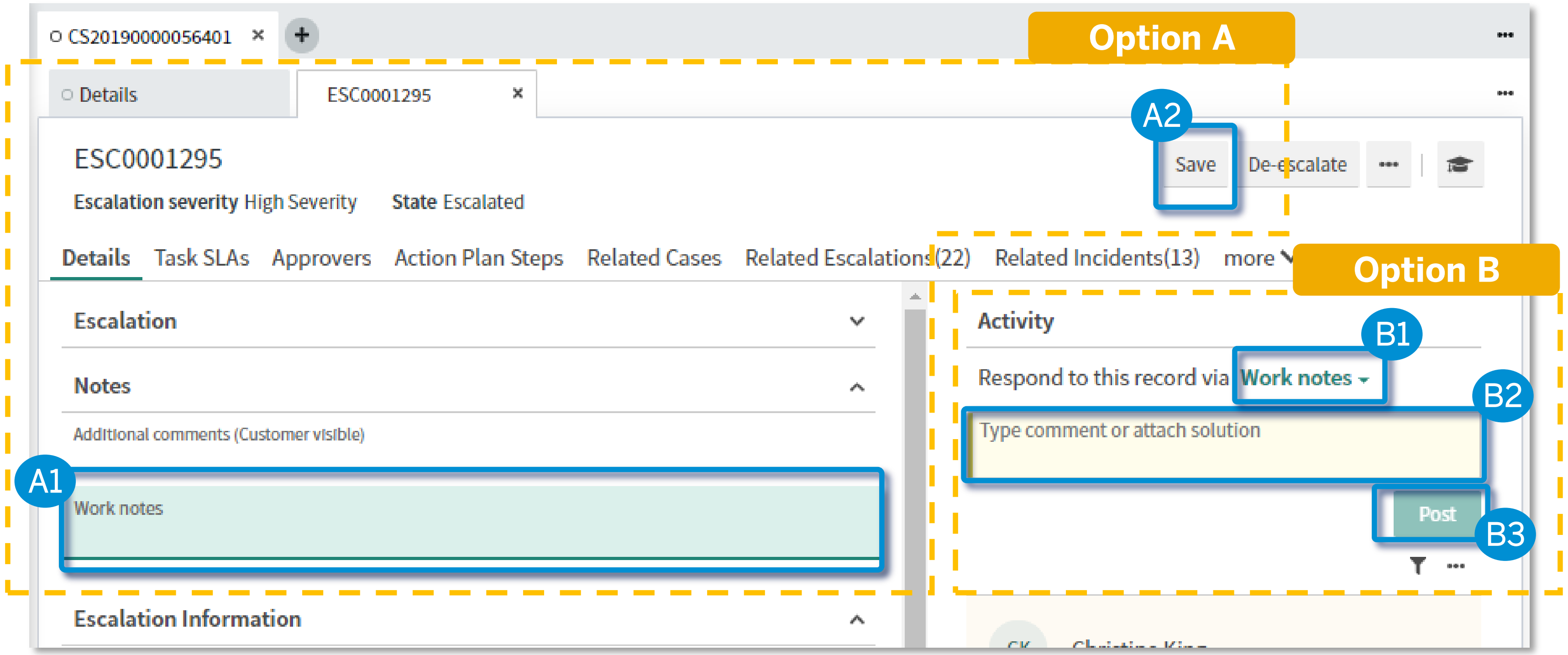
Go to **Escalations** tab, click the **Escalation record number** to open the Escalation record.



Step 2

Option A: In the **Details** tab and in the **Notes** section, provide information in **Work notes** field. Then click **Save** to update the record.

Option B: In the **Activity** column, select **Work notes** for the field **Respond to this record via**. Provide information in the text box below. Then click **Post** to leave the comment.



Change Log

Case Management – Validate Information and Categorize the Case

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	▪ WIPS 4.0 initial document	Draft
2.0.0	Wei Wei	Nov 08, 2019	▪ WIPS 4.0 Golden Standard Baseline Document	Released
2.0.1	Nádia Xavier	Jan 20, 2020	▪ BDM scenario is under revision and content has been removed. Communication between Major Case/ Incident information has been removed . The sequence of scenarios has been changed.	Released
2.0.2	Nádia Xavier	Jan 30, 2020	▪ Page 17: Added Brexit relevant information, updated the country whitelist and the map picture.	Released