

# Validate Information and Categorize the Case

At A Glance

## Case Management Process



### 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.

# 1. Validate All Case Information

## Case Management

### Special handling notes

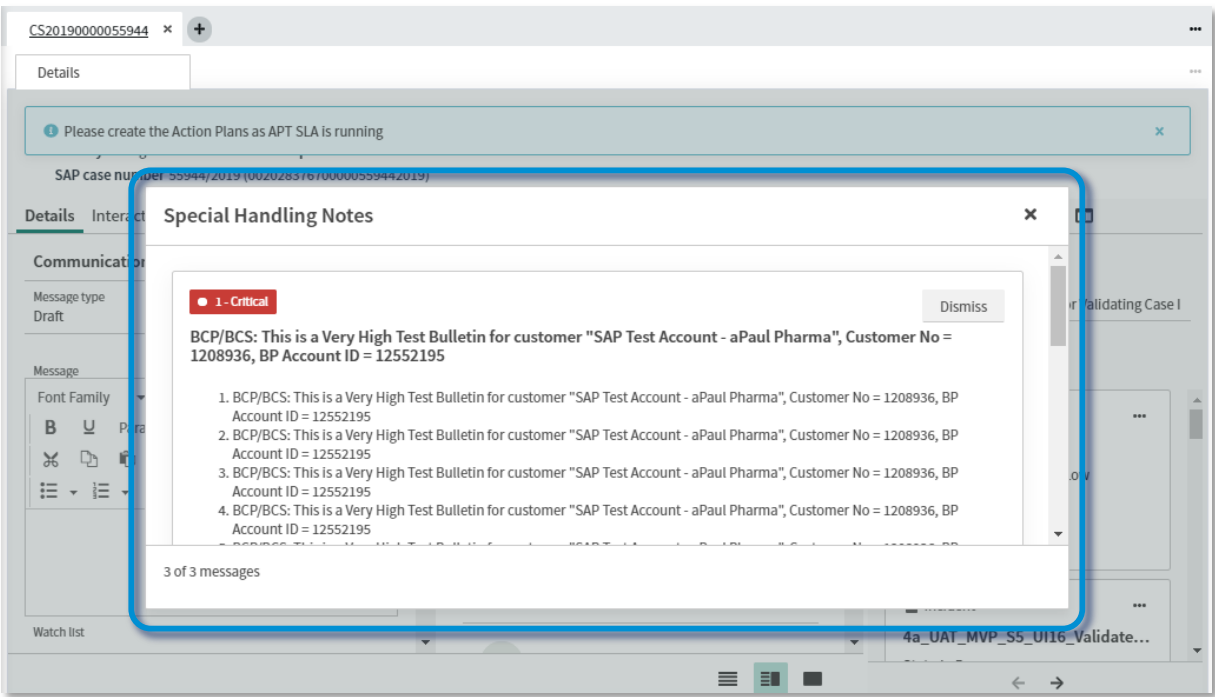
Whenever the Case record is opened, the Special Handling Notes are displayed in the pop-up window. These notes provide specific requirements or agreements regarding the customer, system installation, handling restrictions, etc. that are relevant for the Case handling.

#### Step1

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.

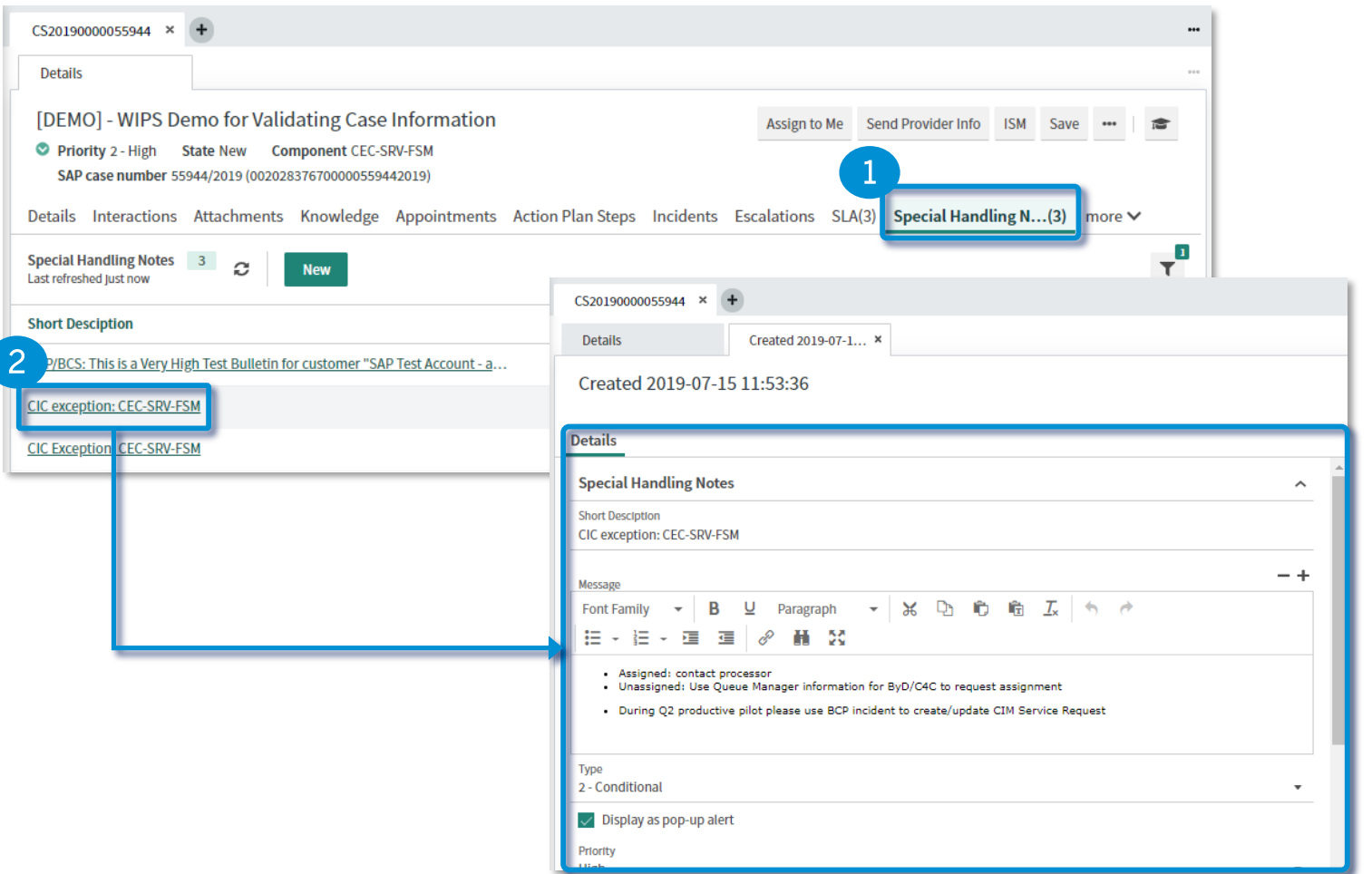
#### Option A: Check Special Handling Notes in the pop-up window

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.



# 1. Validate All Case Information

## Case Management

### 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**.

CS20190000055944

Details

[DEMO] - WIPS Demo for Validating Case Information

✓ Priority 2 - High State In progress Component CEC-SRV-FSM

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps

Communication

Details

Component CEC-SRV-FSM

Priority 2 - High

Assignment group CX FSM

Assigned to Wei Wei

Contract Contract: 0178258016 - Sold Item: Test Installation OM

Activity

WW Wei Wei

Assigned to State

Login details

Remote connection

WW Wei Wei

#### 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.

### 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](#).

CS20190000055944

Details

[DEMO] - WIPS Demo for Validating Case Information

✓ Priority 2 - High State In progress Component CEC-SRV-FSM

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents Escalations SLA(3) more

Communication

Details

System

Related Records

Resolution Information

Initial Description

Subject [DEMO] - WIPS Demo for Validating Case Information

Description

This is a demo to show how to validate Case information.

InfoDoc creation

Business Impact \*

For all P1 and P2 cases, it is mandatory to fill in the Business Impact. You may add more information provided by the customer for the justification of the P1 and P2 cases.

Activity

WW Wei Wei

Field changes 2019-10-29 15:59:28

Assigned to Wei Wei was {Empty}

State In progress was {Empty}

Login details https://launch hash=BA8D0D [Empty] was {Empty}

Remote connection [Empty] was {Empty}

WW Wei Wei

Field changes 2019-10-29 10:51:44

Next action reason APT was {Empty}

WW Wei Wei

Field changes 2019-10-29 10:51:43

Next action due 2019-10-29 14:00:00 was {Empty}

Next action reason IRT was {Empty}

WW Wei Wei

Field changes 2019-10-29 10:51:43

Customer SAP Test

Assignment group CX FSM

Business impact For all P1 and P2 cases, it is mandatory to fill in the Business Impact.

# 1. Validate All Case Information

## Case Management

### 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**.

# 1. Validate All Case Information

## Case Management

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

Scenario / Business Impact	Explanation
<b>A productive system is completely down</b>	<ul style="list-style-type: none"><li>▪ The entire system is technically down and cannot be brought back up</li><li>▪ System goes down multiple times a day requiring restarts resulting in disruption of the core business process</li><li>▪ Core business process is down without any feasible workaround.</li></ul>
<b>The imminent system go-live or upgrade of a production system (as relates to an SAP system) can't be completed</b>	<ul style="list-style-type: none"><li>▪ 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.</li><li>▪ For test and quality systems very high priority will only be justified in the situations where they can jeopardize a production system</li><li>▪ 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</li></ul>
<b>The customer's core business processes are seriously affected</b>	<ul style="list-style-type: none"><li>▪ A business process that can result in significant financial loss or legal ramifications if it cannot be executed on time (example: Shipping, Billing, Payroll)</li></ul>
<b>And for each circumstance a feasible workaround is not available</b>	<ul style="list-style-type: none"><li>▪ A workaround is considered feasible if it requires only minimal level of manual intervention from the customer for the short term</li><li>▪ 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.</li><li>▪ A workaround is not considered feasible if it requires the use of processes outside of an SAP system</li></ul>

# 1. Validate All Case Information

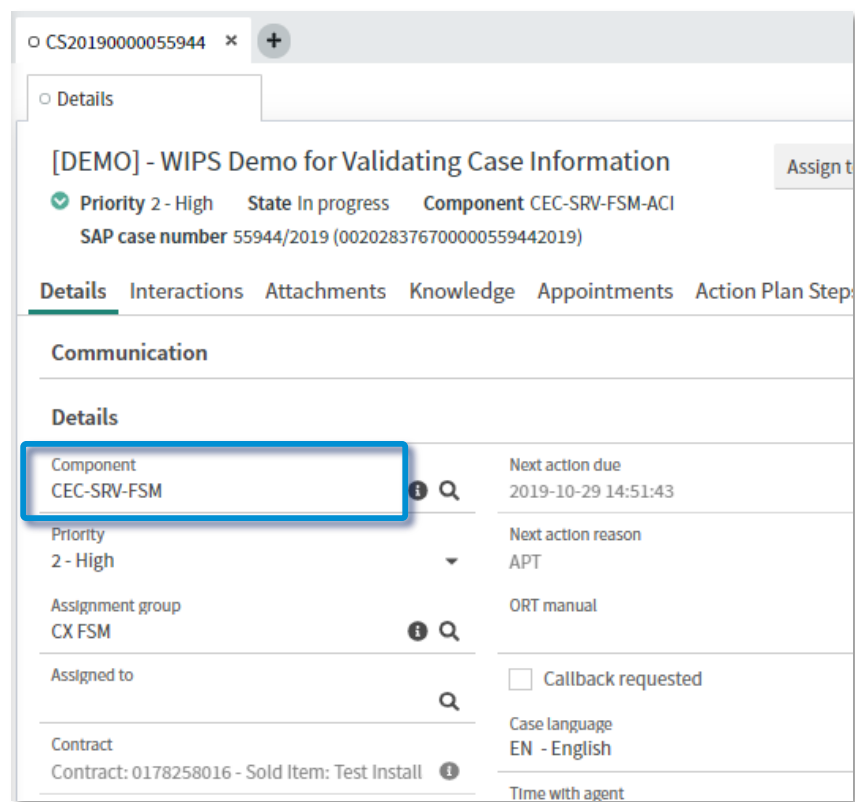
## Case Management

### 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.



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Details

[DEMO] - WIPS Demo for Validating Case Information

Assign to

✓ Priority 2 - High State In progress Component CEC-SRV-FSM-ACI

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps

Communication

Details

Component CEC-SRV-FSM

Next action due 2019-10-29 14:51:43

Priority 2 - High

Next action reason APT

Assignment group CX FSM

ORT manual

Assigned to

☐ Callback requested

Contract

Contract: 0178258016 - Sold Item: Test Install

Case language EN - English

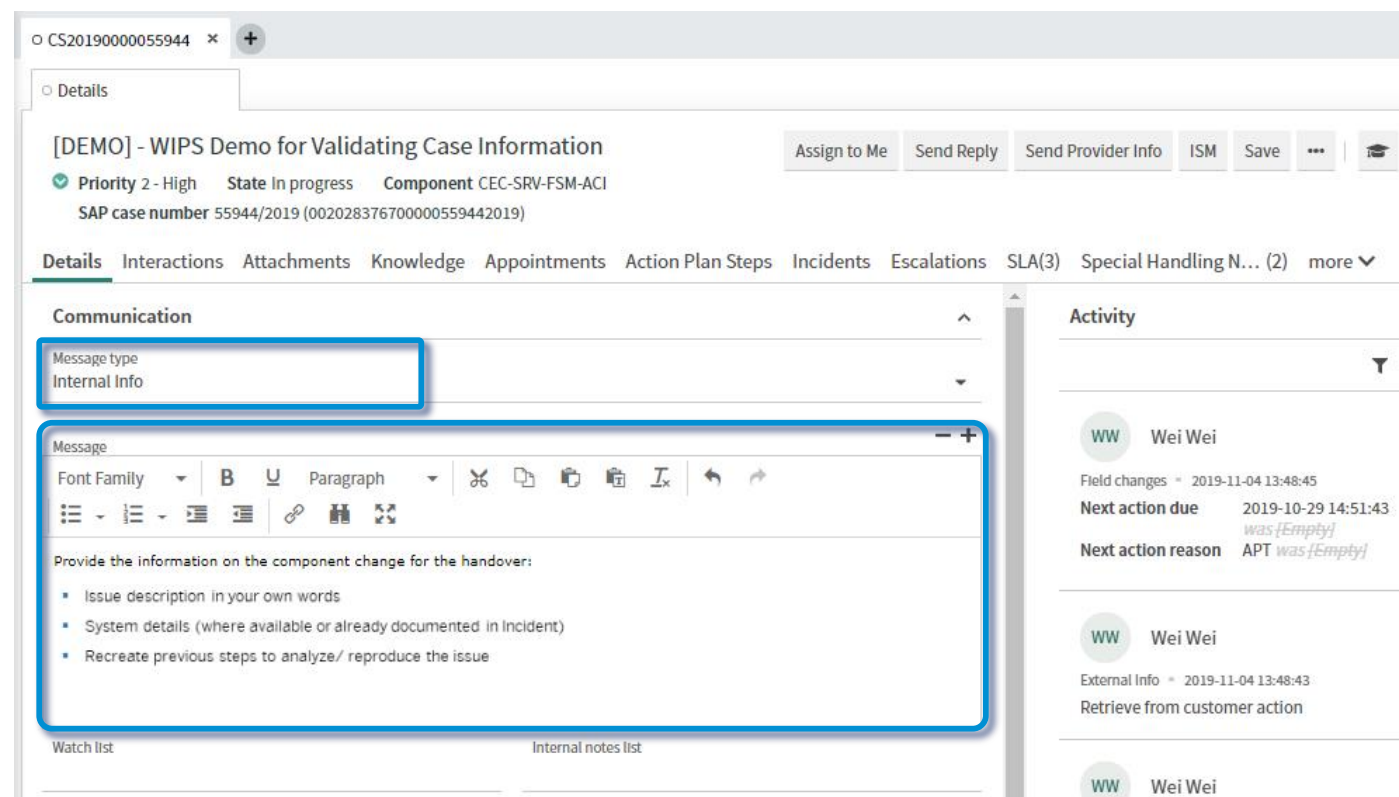
Time with agent

#### 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



CS20190000055944 × +

Details

[DEMO] - WIPS Demo for Validating Case Information

Assign to Me Send Reply Send Provider Info ISM Save ...

✓ Priority 2 - High State In progress Component CEC-SRV-FSM-ACI

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents Escalations SLA(3) Special Handling N... (2) more

Communication

Message type Internal Info

Message

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Provide the information on the component change for the handover:

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

Watch list Internal notes list

Activity

WW Wei Wei

Field changes 2019-11-04 13:48:45

Next action due 2019-10-29 14:51:43

Next action reason APT

WW Wei Wei

External Info 2019-11-04 13:48:43

Retrieve from customer action

WW Wei Wei

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

CS20190000055944 x +

Details

[DEMO] - WIPS Demo for Validating Case Information

✓ Priority 2 - High State In progress Component CEC-SRV-FSM

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents

Communication

Details

Component CEC-SRV-

CEC-SRV-FSM  
Service Cloud Field Service Management

Showing 1-25 of 35

CEC-SRV-FSM-ACI  
Field Service Moments - Integr. Analytics Cloud

CEC-SRV-FSM-ACI\*Deprecated\*  
Field Service Moments - Integr. Analytics Cloud \*

Contract type ES

Customer SAP Test Account - aPaul Pharma

Customer contact Alexandra Paul

Next action due 2019-10-29 14:51:43

Next action reason APT

ORT manual

Callback requested

Case language EN - English

Time with agent

Days	Hours	Minutes	Seconds
0	5	39	22

Time with customer

Days	Hours	Minutes	Seconds
0	0	0	0

Action plan template

Option B: Change component by searching via component list

CS20190000055944 x +

Details

[DEMO] - WIPS Demo for Validating Case Information

✓ Priority 2 - High State In progress Component CEC-SRV-FSM

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents

Communication

Details

Component CEC-SRV-FSM

Priority 2 - High

Assignment group CX FSM

Next action due 2019-10-29 14:51:43

Next action reason APT

ORT manual

Callback requested

Case language EN - English

Time with agent

Days	Hours	Minutes	Seconds
0	5	39	22

Time with customer

Days	Hours	Minutes	Seconds
0	0	0	0

Action plan template

Component

Component 37

CEC-SRV-

Name	Short Description	Path
CEC-SRV-FSM-ARI*Deprecated*	Field Service Moments - Integration with Ariba ...	
CEC-SRV-FSM-ERP	Field Service Management, connector for SAP E...	Customer Engagement and Com
CEC-SRV-FSM-BL	Field Service Moments - Business One Connect...	



# 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.

CS20190000055944 × +

Details

[DEMO] - WIPS Demo for Validating Case Information

Assign to Me Send Reply Send Provider Info ISM Save ...

✓ Priority 2 - High State In progress Component CEC-SRV-FSM  
SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents Escalations SLA(3) Special Handling N... (3) more ▾

Communication

1 Message type  
External Info

2 Message

Font Family B U Paragraph ✂ 📄 📁 📧 Ix ↶ ↷

Provide update/information about the change of the component to the customer

Watch list Internal notes list

Activity

WW Wei Wei

Internal Info • 2019-11-04 15:58:38

Provide the information on the component change for the handover:

- Issue description in your own words
- System details (where available or already
- Recreate previous steps to analyze/ repro

Show More ▾

WW Wei Wei

Field changes • 2019-11-04 15:58:38

Component CEC-SRV-FSM was CEC-SRV-FSM



# 1. Validate All Case Information

## Case Management

### 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.

#### Step1

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

#### Step2

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

CS20190000055944

Details

[DEMO] - WIPS Demo for Validating Case Information

Assign to Me Send Reply Send Provider Info ISM Save

Priority 2 - High State In progress Component CEC-SRV-FSM-ACI

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents Escalations SLA(3) more

Communication

Details

Component CEC-SRV-FSM-ACI

Priority 2 - High

Assignment group CX FSM

Assigned to

Contract contract: 0178258016 - Sold Item: Test Installatic

Contract type ES

Customer SAP Test Account - aPaul Pharma

Customer contact Alexandra Paul

Next action due 2019-10-29 14:51:43

Next action reason APT

ORT manual

Callback requested

Case language EN - English

Time with agent

Time with customer

Action plan template

Activity

WW Wei Wei

Field changes 2019-10-29 16:40:05

Assigned to [Empty] was Wei Wei

Component CEC-SRV-FSM-ACI was CEC-SRV-FSM

WW Wei Wei

Internal Info 2019-10-29 16:31:01

If there is any new information, use Internal Info to document in the Case record.

WW Wei Wei

Field changes 2019-10-29 16:13:48

Business impact For all P1 and P2 cases, it

# 1. Validate All Case Information

## Case Management

### 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.

The screenshot displays the SAP Case Management interface for case CS20190000055944. The case details include: [DEMO] - WIPS Demo for Validating Case Information, Priority 2 - High, State In progress, Component CEC-SRV-FSM, and SAP case number 55944/2019 (002028376700000559442019). The interface shows various tabs like Details, Interactions, Attachments(1), Knowledge, Appointments, Action Plan Steps, Incidents, Escalations(1), and SLA(3). The 'Details' tab is active, showing fields for Component, Priority, Assignment group, Assigned to, Contract, Contract type, Customer, Customer contact, Current channel, and Source channel. A 'Next action due' field shows 2019-10-29 14:51:43. A 'Next action reason' field shows APT. A 'ORT manual' field shows 2019-11-08 17:53:05. A calendar and time picker are open, showing the date 2019 November and the time 17:53:05. The 'OK' button is highlighted. The 'Save' button is also highlighted. The 'Activity' section on the right shows a list of activities, including 'Wei Wei' and 'system'.

# 1. Validate All Case Information

## Case Management

### 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

#### Step1

Go to **SLA** tab,  
The **Actual elapsed time** and **Actual time left** for each processing time are displayed below.

#### Step2

Click each of the SLA definitions to open the entry.

#### Step3

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

CS20190000055944

[DEMO] - WIPS Demo for Validating Case Information

Priority 2 - High State In progress Component CEC-SRV-FSM-ACI

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents Escalations **SLA(3)** more

SLA 3 Last refreshed 42m ago

Task	SLA definition	Stage	Actual elapsed time	Actual time left
CS20190000055944	ZOP_APT1_2_P2	In progress	1 Day 23 Hours 19 Minutes	0 Seconds
CS20190000055944	Z_ES_IRT_P2	In progress	1 Day 23 Hours 19 Minutes	0 Seconds
CS20190000055944	Z_MPT_P2	In progress	1 Day 23 Hours 19 Minutes	10 Days 40 Minutes

Annotation 1 points to the 'Actual elapsed time' and 'Actual time left' columns. Annotation 2 points to the 'Z\_MPT\_P2' SLA definition row.

CS20190000055944

Details Z\_MPT\_P2 Z\_ES\_IRT\_P2

**Z\_MPT\_P2**

Details

**SLA Definition**

Name Z\_MPT\_P2

Type SLA

Target Resolution

Table sn\_customerservice\_case

\* Field type table\_name is not supported.

☒ Active

☐ Enable logging

Annotation a points to the Duration field (12 Days, 0 Hours, 0 Minutes, 0 Seconds). Annotation b points to the Schedule field (24 x 7).

### 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:**

- Preferred Care contract,: Real time (24x7) calculation for P2
  - 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:
  - an AP is created and sent to customer,
  - the priority is lowered,
  - solution is provided
  - 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.

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

Contract Type	PSLE & STD (Standard Support )	PSLE & STD including MA/AA²/AE (Max-/Active Attention/ Active Embedded)	PSLE & STD including MA/AA²/AE SLA (SLA = Service Level Agreement)	PSLE & STD including MA/AA²/AE PSLA (PSLA = Premium SLA)	PSLE, STD,ES Incl. PC (PC = Preferred Care on-Premise)	ES (Enterprise Support)	ES (Enterprise Support) including MA/AA²/AE	CES (Enterprise Support Cloud Edition)	CPC (Cloud Preferred Care) CPS¹ (Cloud Preferred Success)	Cpremium (Cloud Premium Care) (For existing customers only. No new contracts anymore)
Priority										
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.**
  - ¹Cloud Preferred Success (CPS) will replace CPC (new customers or CPC renewals)
  - ²Active 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.

# 1. Validate All Case Information

## Case Management

### 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.

CS20190000055944 x +

Details

[DEMO] - WIPS Demo for Validating Case Information

Assign to M

✓ Priority 2 - High State In progress Component CEC-SRV-FSM

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments(1) Knowledge Appointments Action Plan Steps Incidents

Communication

Details

Component CEC-SRV-FSM

Next action due 2019-10-29 14:51:43

Priority 2 - High

Next action reason APT

Assignment group CX FSM

ORT manual

Assigned to

Case language EN - English

Contract 0178258016 - Sold Item: Test Installation OM

Contract type ES

Time with agent

Days	Hours	Minutes	Seconds
16	7	16	7

#### 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.

CS20190000055944 x +

Details Contract: 0178258016 - Sold Item: Test Installation OM

Details Entitlements Assets Covered Terms and Conditions Contacts Cases(20)

Contract

Number	CNTR0331628	State	Active
Account *	SAP Test Account - aPaul Pharma	SLA Profile APT	ZOP_APT1_2
Sold Item	Test Installation OM	SLA Profile IRT	Z_ES_IRT
Deployed Item		SLA Profile MPT	Z_MPT
Contract number *	0178258016	SLA Profile ORT	
SAP Contract Type	ES		
Start	2014-11-25		
End	9999-12-31		

#### 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.

CS20190000055944 x +

Details Contract: 0178258016 - Sold Item: Test Installation OM

Z\_ES\_IRT

Details SLA Definitions(4)

SLA Definitions 4 Last refreshed just now

SLA Definition 3

Z\_ES\_IRT\_P4

Z\_ES\_IRT\_P2

Z\_ES\_IRT\_P1

Z\_ES\_IRT\_P3

CS20190000055944 x +

Details Contract: 0178258016 - Sold Item: Test Installation OM

Z\_ES\_IRT\_P2

Details

SLA Definition

Name Z\_ES\_IRT\_P2

Type SLA

Target Response

Table sn\_customerservice\_case

Duration \*

Days	Hours	Minutes	Seconds
0	4	0	0

Schedule source SLA definition

Schedule \* 24 x 7

Timezone source The caller's time zone

\* Field type table\_name is not supported.



# 1. Validate All Case Information

## Case Management

### 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.

The screenshot displays the SAP Now Case Management interface. The top navigation bar includes a 'Back' button and a user profile icon with initials 'WW'. A settings menu is open, showing options like 'Settings', 'Display Preferences', 'Show Ribbon' (checked), 'Show Sidebar' (checked), 'Wrap List Text' (unchecked), and 'Logout'. The main content area shows a case titled '[DEMO] - WIPS Demo for Validating Case Information' with details like 'Priority 2 - High', 'State In progress', and 'Component CEC-SRV-FSM-ACI'. The 'Customer contact' section shows 'Alexandra Paul' with contact information. A red circle with '19h 19m Breached' indicates the SLA calculation. The bottom section shows 'Communication' and 'Details' tabs, with a 'Business impact' note stating 'For all P1 and P2 cases, it is mandatory to fill in the'.



# 1. Validate All Case Information

## Case Management

### 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.

CS20190000055944

Details

[DEMO] - WIPS Demo for Validating Case Information

Assign to Me

Send Reply

Send Provider Info

ISM

Save

Priority 2 - High

State In progress

Component CEC-SRV-FSM-ACI

SAP case number 55944/2019 (002028376700000559442019)

Details

Interactions

Attachments

Knowledge

Appointments

Action Plan Steps

Incidents

Escalations

SLA(3)

more

Communication

Details

System

Sold Item (Installation)

Test Installation OM

Deployed item (System)

Joris Test

1

Data protection & security

EUDP

2

☐ EUDP deactivated

☐ Early adopter care

Login details

https://launchpad.support.sap.com/#/seca/000000000800093678/002028376700000559442019?hash=630FC7CBC3AFDBAE6CD731922E735E1ABAB23030D09E508DB915F22C805CA14C

Related Records

Major Case

Problem

Resolution Information

Activity

WW

Wei Wei

Field changes

2019-10-29 16:40:05

Assigned to

[Empty] was Wei Wei

Component

CEC-SRV-FSM-ACI was CEC-SRV-FSM

WW

Wei Wei

Internal Info

2019-10-29 16:31:01

If there is any new information, use Internal Info to document in the Case record.

WW

Wei Wei

Field changes

2019-10-29 16:13:48

Business impact

For all P1 and P2 cases, it is mandatory to fill in the

# 1. Validate All Case Information

## Case Management

### EUDP Restriction

Country Whitelist for Remote and Attachment Access

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



#### Member states of the European Union (blue):



### 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 31<sup>st</sup> 2020 the UK is not part of the EU anymore. However until Dec 31<sup>st</sup> 2020 the UK is in a transition period in which the remote access - & attachment handling rules keep the same for UK-based engineers.



# 1. Validate All Case Information

## 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.

#### 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.

CS20190000055944 × +

Details

[DEMO] - WIPS Demo for Validating Case Information

✓ Priority 2 - High State In progress Component CEC-SRV-FSM-ACI

SAP case number 55944/2019 (002028376700000559442019)

Details Interactions Attachments Knowledge Appointments Action

Communication

Details

System

Sold Item (Installation)  
Test Installation OM ⓘ 🔍

Deployed Item (System)  
Joris Test ⓘ 🔍

Data protection & security  
EUDP

☐ EUDP deactivated

☐ Early adopter care

Login details  
https://launchpad.support.sap.com/#/seca/000000000800093678/002028376700000559442019?hash=630FC7CBC3AFDBAE6CD731922E735E1ABAB23030D09E508DB915F22C805CA14C

# 1. Validate All Case Information

## 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

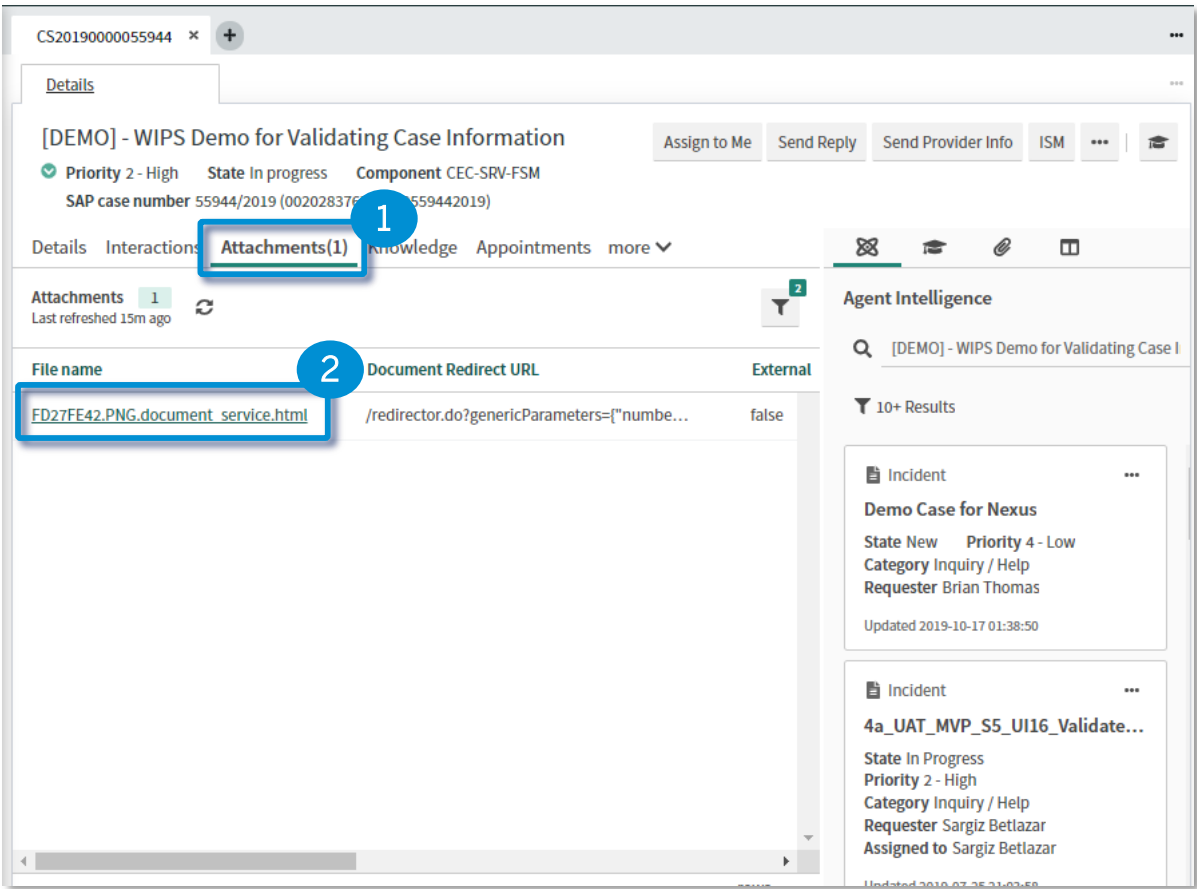
## Case Management

### 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.

#### Step1

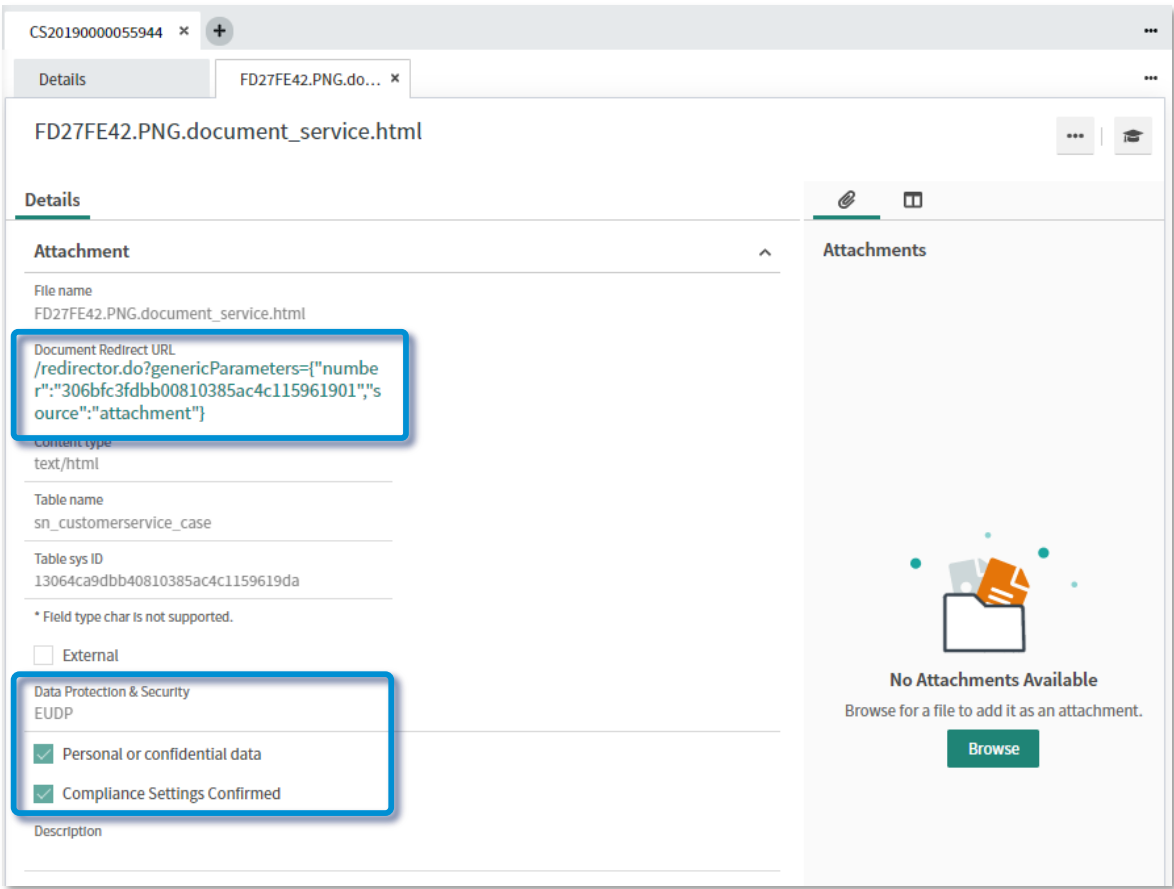
Go to **Attachments** tab and click the **File name** to open the details of the attachment.



#### Step2

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

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





# 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.

test.itsm.services.sap/sap\_contact\_details\_attac...

Apps SAP Managed Bookmarks Sharepoint Servicenow

### Local security and data privacy regulations

Please be advised that access to this attachment is restricted by local security and data privacy regulations.

1 Please specify the country where you are currently located: Germany

2 Please specify your current working location within the country: SAP Office

Please also confirm the following:

3 ☒ I hereby confirm that the above entered data on my current country and location is correct.

Confirm

#### 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.

CS20190000055944

Details FD27FE42.PNG.do...

FD27FE42.PNG.document\_service.html

Details

Attachment

File name  
FD27FE42.PNG.document\_service.html

1 Document Redirect URL  
/redirector.do?genericParameters={"numbe  
r":"306bfc3fdbb00810385ac4c115961901","s  
ource":"attachment"}

Content type  
text/html

Table name  
sn\_customerservice\_case

Table sys ID  
13064ca9dbb40810385a4c1159619da

\* Field type char is not supported.

☐ External

Data Protection & Security  
EUDP

☒ Personal or confidential data

☒ Compliance Settings Confirmed

Description

2 Record | Agent Workspace

xRTwHxEfIUROq1AM7XLaPe...

documentsstnxd3nrx8c.int.sap.eu2.hana.ondemand.c...

Apps SAP Managed Bookmarks Sharepoint Servicenow Other bookmarks

now

Create New Case

Details

Activity

Agent Workspace

## 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



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.

Notes

Instructions on how to provide information using Escalation records [here](#).

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.

CS20190000056401

Details

[DEMO] - WIPS Request for Escalation - Critical Incide...

Send ReplySend Provider InfoISMSave...

✓ Priority 3 - MediumState In progressComponent CEC-SRV-FSM

SAP case number 56401/2019 (002028376700000564012019)

DetailsInteractionsAttachmentsKnowledgeAppointmentsAction Plan StepsIncidentsEscalations(1)SLA(2)more

Escalations 1

Last refreshed Just now

Number	State	Escalation trend	Escalation severity
ESC0001295	Escalated		High Severity

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.

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.

Notes

Instructions on how to provide information using Escalation records [here](#).

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.

CS20190000056401 × +

Details

[DEMO] - WIPS Request for Escalation - Critical Incide...

Assign to Me Send Reply ISM Save ...

✓ Priority 3 - Medium State In progress

SAP case number 56401/2019 (002028376700000564012019)

Component CEC-SRV-FSM

Details Interactions Attachments Knowledge(2) Appointments Action Plan Steps(1) Incidents Escalations(1) SLA(2) more

Initial Description

Subject

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

Description

Font Family B U ✂ 📄 📁 📧 ✎ ↶ ↷

☰ ☷ ☹ ☺ 🔗 📎 🔄

This is a demo to explain how to communicate during critical incident situation.

Business Impact \*

Font Family B U ✂ 📄 📁 📧 ✎ ↶ ↷

☰ ☷ ☹ ☺ 🔗 📎 🔄

Support Engineer should provide business impact here once the ecalation is approved and created.

WW Wei Wei

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

WW Wei Wei

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

Business impact Support Engineer should created.

was {Empty}

Action plan template Call to Customer was {E

Login details https://launchpad.supp  
hash=71496AF7A0A7B0!  
https://launchpad.supp  
hash=6810E6C2F4C86D

Show less

WW Wei Wei

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

Knowledge Article KB0010642 has been attached.

# 3. Request for Escalation (if necessary)

## Case Management

### 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.

Notes

Instructions on how to provide information using Escalation records [here](#).

### 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.

CS20190000056401

Details

[DEMO] - WIPS Request for Escalation - Critical Incide...  
Priority 3 - Medium State In progress Component CEC-SRV-FSM  
SAP case number 56401/2019 (002028376700000564012019)

Send Reply Send Provider Info ISM Save

Details Interactions Attachments Knowledge Appointments Action Plan Steps Incidents Escalations(1) SLA(2) more

Communication

Message type  
External Info

Message

Font Family B U Paragraph  
Provide information and update to customer|

Activity

CK Christine King  
Internal Info 2019-11-06 00:00:12  
Escalation ESC0001295 has updated:  
2019-11-06 00:00:11 - Christine King (Work notes)  
Case: CS20190000056401  
Case Short Description: [DEMO] - WIPS  
Show More

### 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.

26

# 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

## 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.

How to communicate with escalation processing teams using Escalation records

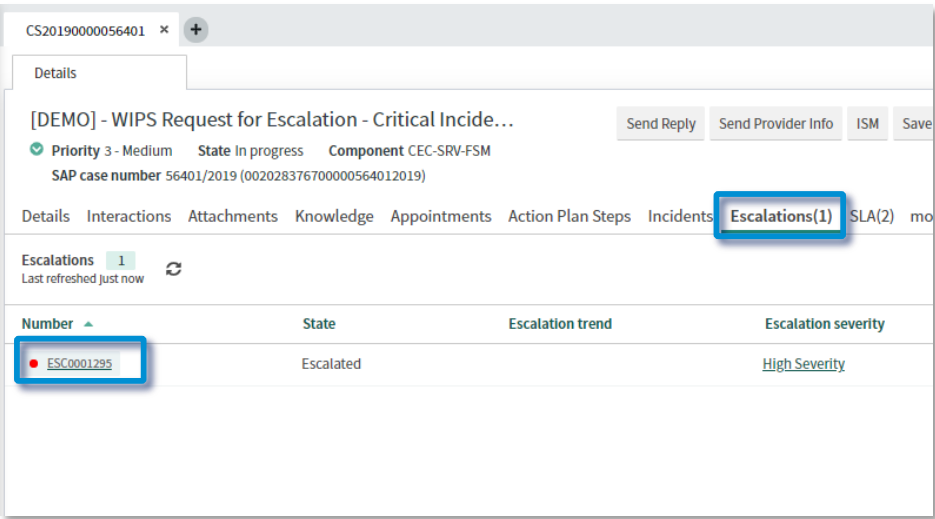
The Support Engineer can also use **Work notes within the Escalation records** to communicate with the escalation processing teams.

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

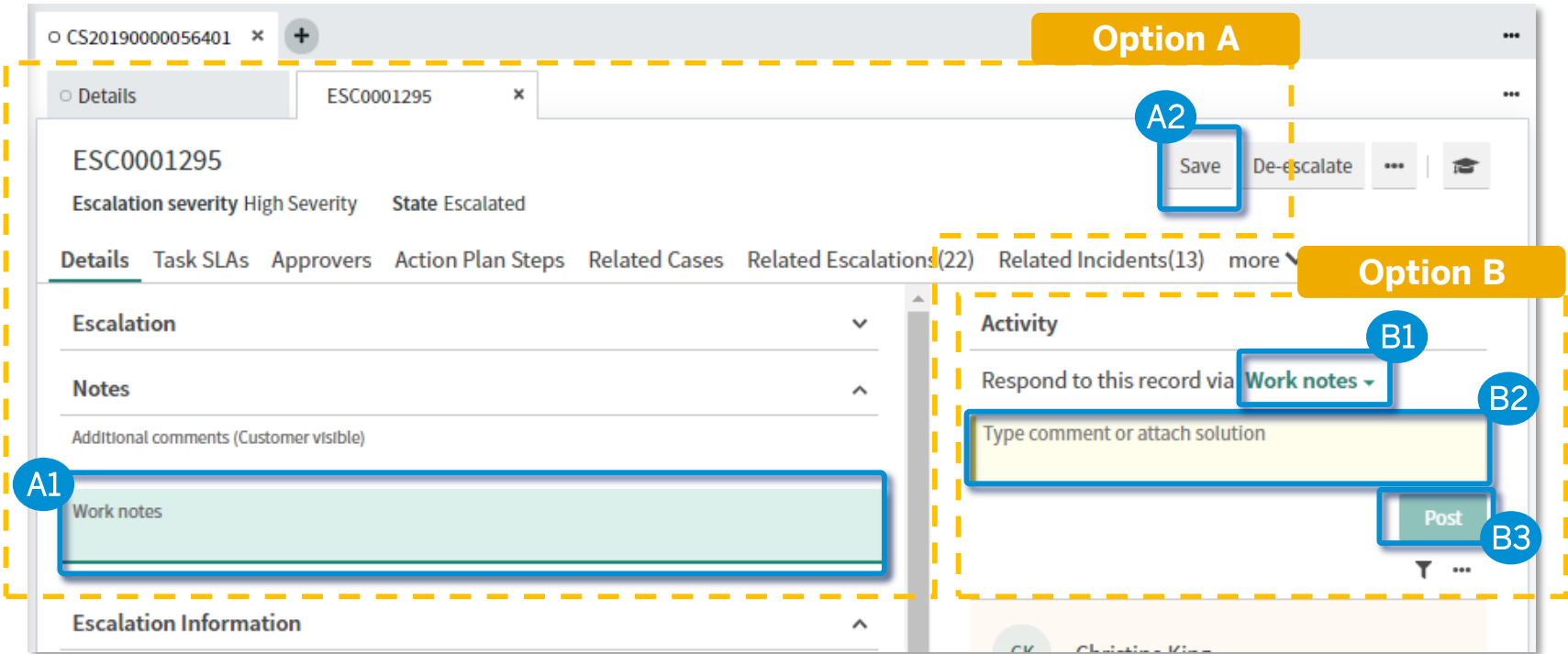
Step1

Step2

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



- 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	<ul style="list-style-type: none"><li>WIPS 4.0 initial document</li></ul>	Draft
2.0.0	Wei Wei	Nov 08, 2019	<ul style="list-style-type: none"><li>WIPS 4.0 Golden Standard Baseline Document</li></ul>	Released
2.0.1	Nádia Xavier	Jan 20, 2020	<ul style="list-style-type: none"><li>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.</li></ul>	Released
2.0.2	Nádia Xavier	Jan 30, 2020	<ul style="list-style-type: none"><li><a href="#">Page 17</a>: Added Brexit relevant information, updated the country whitelist and the map picture.</li></ul>	Released