Expert Chat 2.0 – Incident Creation / Update

Incident Creation

Use 1click Incident Creation
Verify Ticketing System

➡ **Review Component**

Incident Update

Get Chat SessionID ➡ **Update Chat transcript in an Existing Incident**   **Or**   **Update remaining transcript of an ongoing Chat**

Purpose

It is mandatory to record Expert Chat interactions on incidents (or cases). In some circumstances, the incident must be created during the real-time interaction, therefore, the incident should be updated with the remaining interactions a the end of the Expert Chat session.

ServiceNow and BCP

During ServiceNow rollout in Product Support, there are some additional processes to be taken into consideration during incident (or case) creation or update

Notes ⚠

The well-known term Incident or customer incident is represented as Case at ServiceNow.

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Incident Creation

🗺 Steps to create an incident

Choose Ticketing System

To choose the ticketing system to create the incident or case, please follow the steps described here.

Expert Chat PS

Chat Session Id 135756671446220625

SYSTEM

System Name:

System Number:

Installation:

Component:

LINKS

Remote Connection
xSearch
Display Logon Data
Create Incident
Create BSR
Create Case

Expert Chat PS

Chat Session Id 135756671446220625

SYSTEM

System Name:

System Number:

Installation:

Component:

LINKS

Remote Connection
xSearch
Display Logon Data
Create Incident
Create BSR
Create Case

Option A: Create Incident at BCP

Use this option for areas which are still using BCP

Step 1

At Bold360, open Expert Chat PS Board

Step 2

Click in Create Incident

Option B: Create Case at ServiceNow

Use this option for areas which already migrated to ServiceNow

Step 1

At Bold360, open Expert Chat PS Board

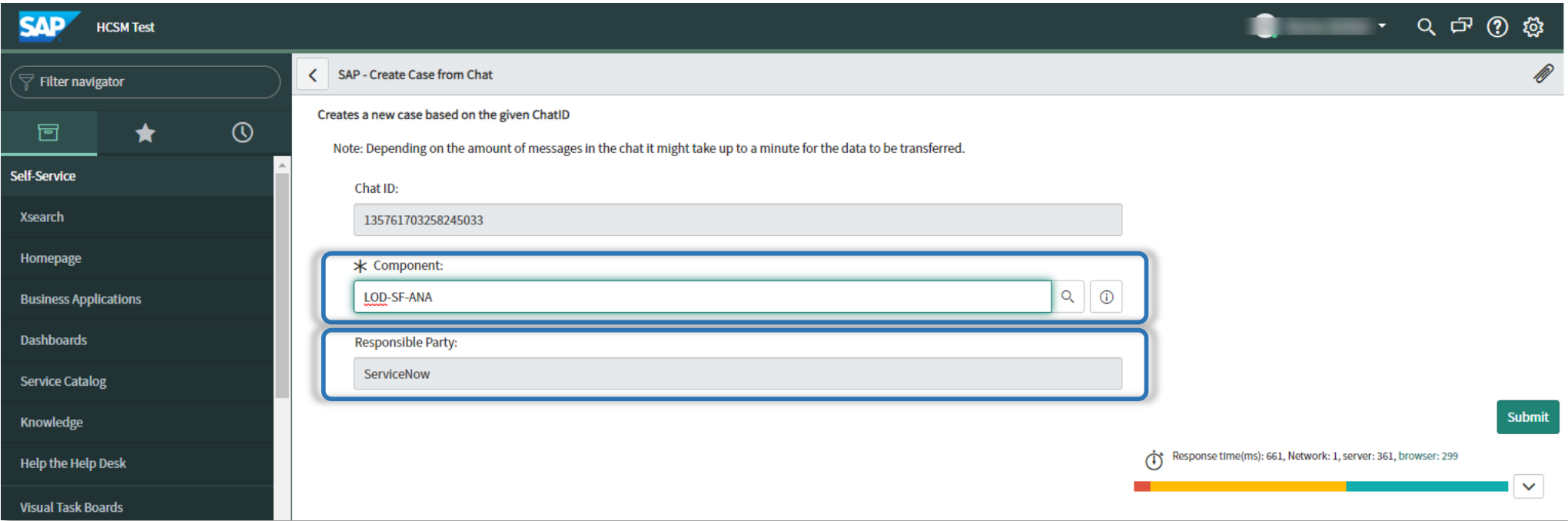**Step 2**

Click in Create Case

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Steps to create an incident

Creating a Case at ServiceNow

To create a case at ServiceNow, please follow the steps described here.

After clicking in Create Case at Bold360, the "SAP – Create Case from Chat" will open.

ChatID is automatically populated.

Step 1

Select the most appropriate Component according to the issue described in the interaction.

Step 2

Review Responsible Party field. If it doesn't contain ServiceNow. The incident must be created at BCP system.

Notes ⚠️

The message "The selected component is not handled in ServiceNow. Please create a ticket in BCP" will be displayed if the component selected is not being processed in ServiceNow yet.

In this situation, cancel the current process and click in "Create Incident at BCP" at Bold360 (see Choosing Ticket System step)
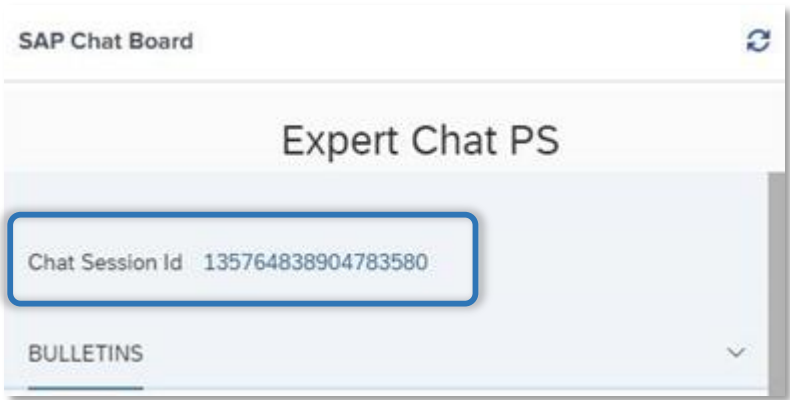
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Incident Update

Steps to update a chat transcript in an existing incident

Getting Chat SessionID

To get the Chat SessionID at Bold360, please follow the steps described here.

Option A: Getting SessionID from Bold360 SAP Chat Board

Step 1

At Bold360, open SAP Chat Board

Step 2

Click in Chat Session Id to copy the SessionID to your clipboard

Option B: Getting SessionID from Expert Chat Monitor Tool

Step 1

At Expert Chat Monitor Tool, open Recent Chats Received option

Step 2

Click in the session you want to get the sessionID and select Copy to Clipboard -> Session ID

Notes

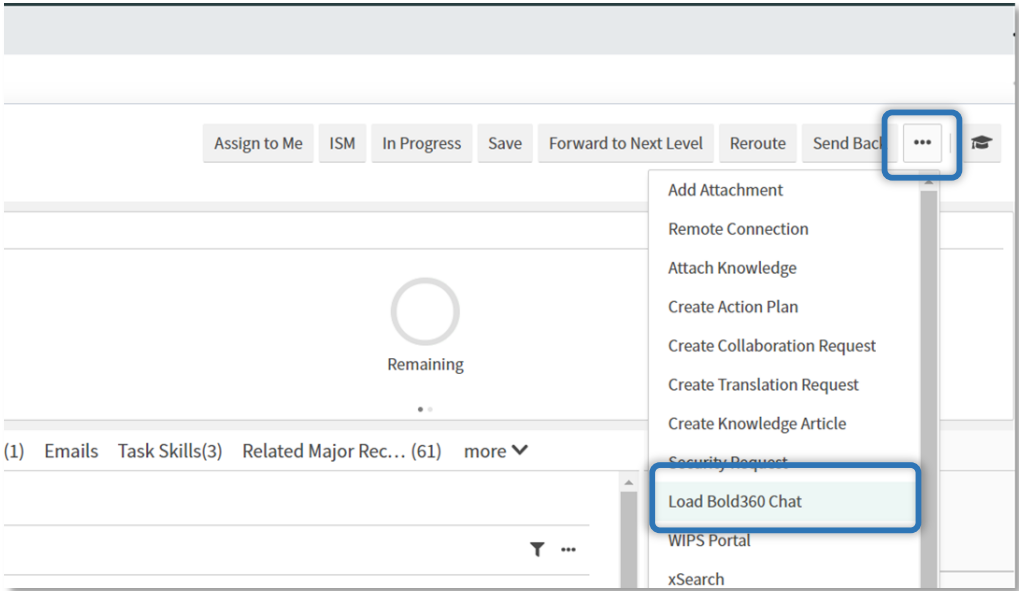Recent Chat Session IDs and Transcripts are stored locally on Expert Chat Monitor Tool up to 7 days.

Steps to update a chat transcript in an existing incident

Loading the Chat Transcript

To load the Chat transcript at ServiceNow, please follow the steps described here.
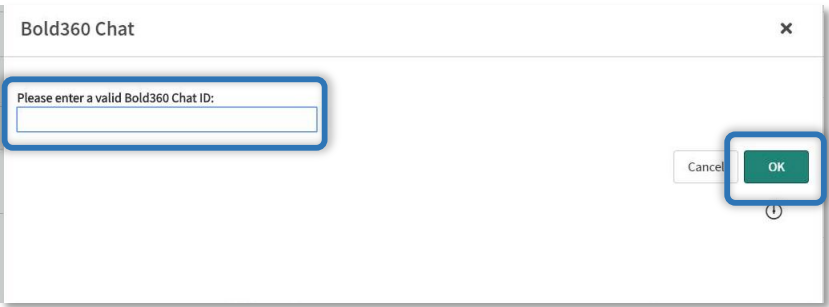

After getting the Chat SessionID

Step 1

After opening the existing incident, click in the "three dots" button

Step 2

Select Load Bold360 Chat

Step 1

Paste or type the SessionID.

Step 2

Click in OK to load the transcript and attachments of the chat session into this incident

WORK INSTRUCTIONS, PROCESSES, SYSTEMS
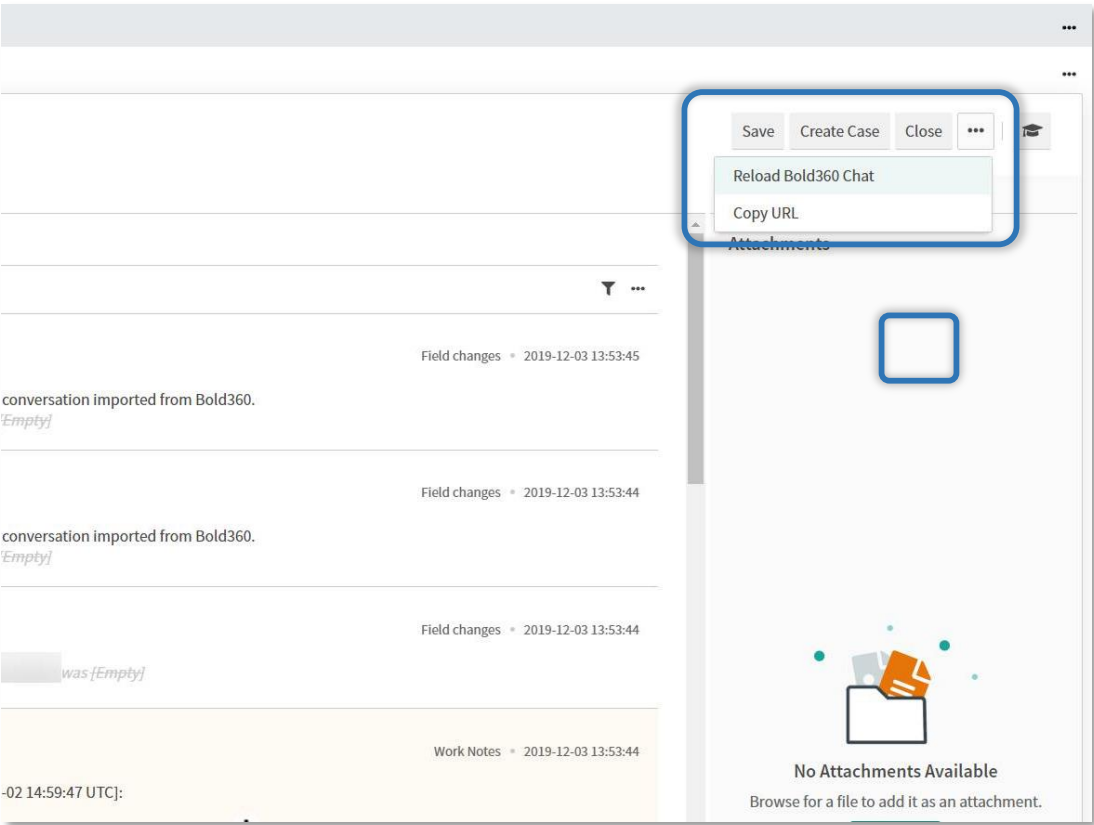
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📍 **Steps to update remaining transcript of an ongoing Chat**

Updating remaining transcript of an ongoing Chat

To update remaining Chat transcript of an ongoing Chat at ServiceNow, please follow the steps described here.

Step 1

At ServiceNow, click in the "three dots" button

Step 2

Select Reload Bod360 Chat

Change Log
Secondary title if needed

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

Lisandro Magnus, Brasil
Process owner

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Lisandro Magnus	December 10, 2019	▪ New document for ServiceNow	Released