Validate, Prioritize, Categorize, and Assign a Problem
At a Glance

Problem Management Process

Log and Categorize a Problem	→	Diagnose and Define	→	Resolve and Realize	→	Validate and Close

Validate, Prioritize, Categorize, and Assign a Problem

Purpose

Problem Coordinator validates, prioritize, and categorize the Problem record to ensure all information has been captured accurately and completely and assigns the Problem to the responsible development and/or operations teams to perform Root Cause Analysis.

1. Problem Coordinator Validates the Problem

1a Problem Coordinator assigns the Problem record to himself

1b Assess the Problem to ensure all necessary information is provided

1c Reject the Problem if it's invalid (if applicable)

Scenario 1: There is existing Problem record with similar issue

Mark the new Problem record as duplicate

Scenario 2: There is lack of reason to continue the work

Cancel the Problem record

2. Problem Coordinator Prioritizes, Categorizes, and Assigns the Problem to Problem Processor

2a Verify and change the priority if necessary

2b Add relevant stakeholders to the Watch list and/or Internal note list and update External/Internal info

2c Confirm the Problem record's validity to start Root Cause Analysis

2d Assign the Problem to the processor to work on the reported issue
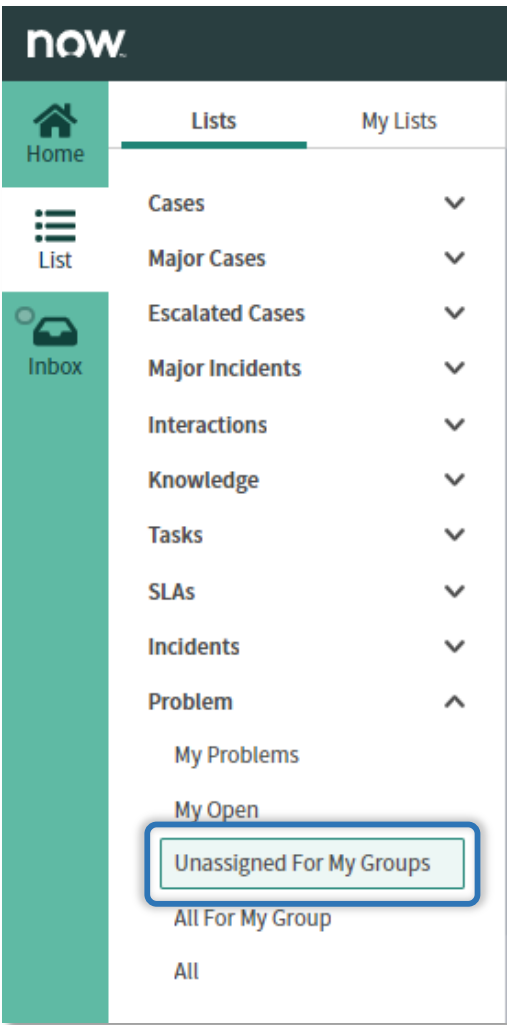
Notes ⚠

Step 1c can also be performed at later stage during RCA analysis or solution implementation.

1. Coordinator Validates the Problem
Problem Management

1a Problem Coordinator assigns the Problem record to himself
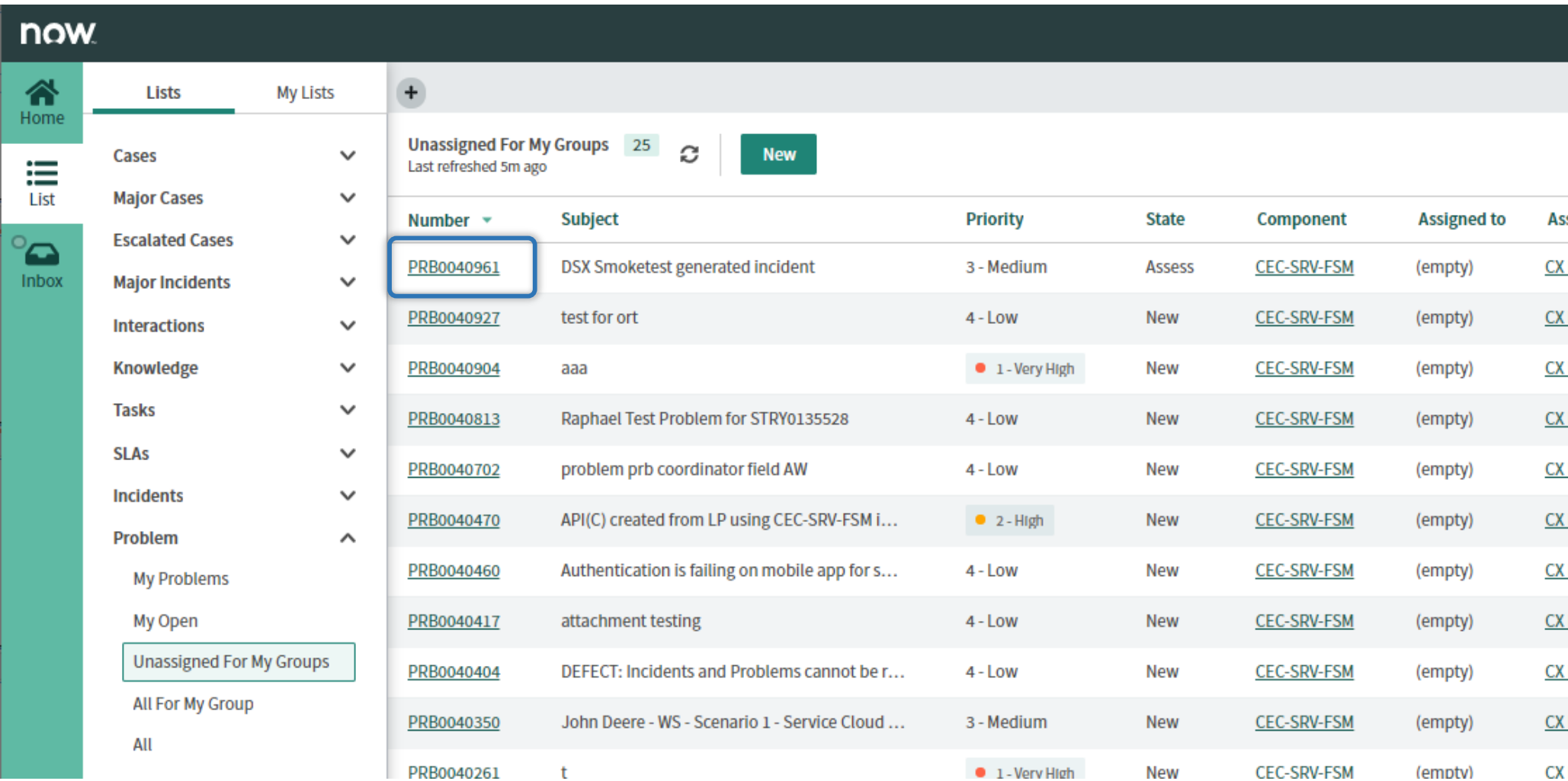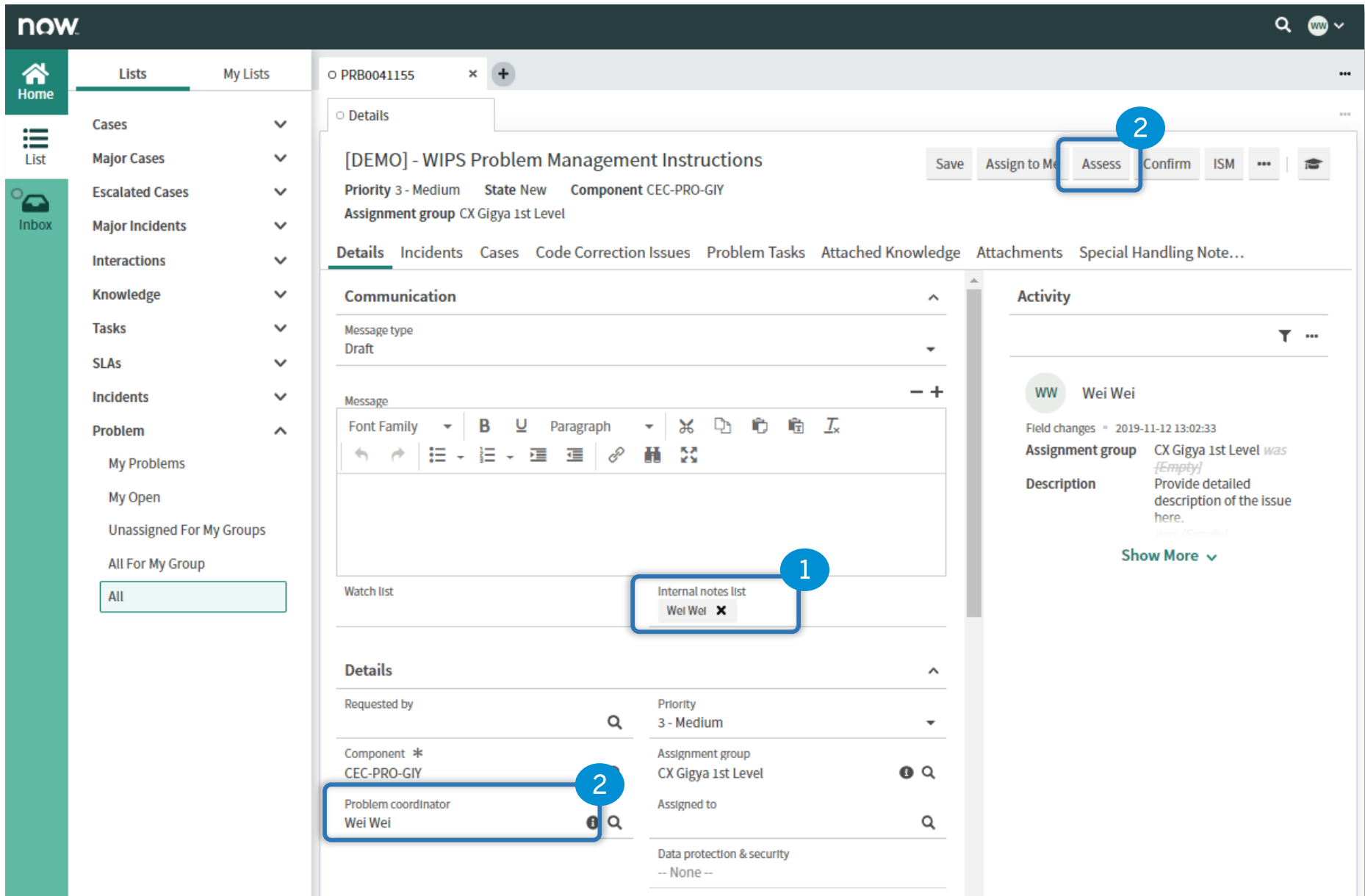
Step 1

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

Step 2

Click **Unassigned For My Groups** in the list to view all Problems that have not been assigned to any processor.

Then click the **Problem Number** to open the selected record.

Number ▼	Subject	Priority	State	Component	Assigned to	As
PRB0040961	DSX Smoketest generated incident	3 - Medium	Assess	CEC-SRV-FSM	(empty)	CX
PRB0040927	test for ort	4 - Low	New	CEC-SRV-FSM	(empty)	CX
PRB0040904	aaa	● 1 - Very High	New	CEC-SRV-FSM	(empty)	CX
PRB0040813	Raphael Test Problem for STRY0135528	4 - Low	New	CEC-SRV-FSM	(empty)	CX
PRB0040702	problem prb coordinator field AW	4 - Low	New	CEC-SRV-FSM	(empty)	CX
PRB0040470	API(C) created from LP using CEC-SRV-FSM i...	● 2 - High	New	CEC-SRV-FSM	(empty)	CX
PRB0040460	Authentication is failing on mobile app for s...	4 - Low	New	CEC-SRV-FSM	(empty)	CX
PRB0040417	attachment testing	4 - Low	New	CEC-SRV-FSM	(empty)	CX
PRB0040404	DEFECT: Incidents and Problems cannot be r...	4 - Low	New	CEC-SRV-FSM	(empty)	CX
PRB0040350	John Deere - WS - Scenario 1 - Service Cloud ...	3 - Medium	New	CEC-SRV-FSM	(empty)	CX
PRB0040261	t	● 1 - Very High	New	CEC-SRV-FSM	(empty)	CX

1. Coordinator Validates the Problem
Problem Management

1a Problem Coordinator assigns the Problem record to himself

Step 1

The Problem Coordinator adds his name to the field **Internal notes list** in order to receive any future internal update and comment posted in the record.

Step 2

The Problem Coordinator adds his name to the field **Problem Coordinator**.

Step 3

Click **Assess** to start the process of assessing the problem. This changes the state of the record to **Assess**.

1. Coordinator Validates the Problem
Problem Management

1b Assess the Problem to ensure all necessary information is provided

Step 1

Check that all mandatory fields are correctly filled to ensure the completeness and correctness of the information provided.

Step 2

Contact the requestor for any missing information or clarification using **External Info** and other communication channels if applicable.

Notes ⚠

The mandatory fields for assessing Problem are:
a. **Component**
b. **Subject**
c. **Description**

Message Flow

- If the Problem is created from Case/Incident, the External Info sent from Problem will be displayed in **Activity** section as the **Internal Info** in the Case/Incident record.

- If the Problem is created without related Case/Incident, the **External Info** sent from Problem will be sent to the creator of this Problem record and documented in the Problem record's **Activity** section.

1. Coordinator Validates the Problem
Problem Management

1c Reject the Problem if it's invalid (if applicable)

Scenario 1 There is existing Problem record with similar issue.

Steps:

1. Click **Mark Duplicate**.

2. Add the **existing (previously opened) Problem record number** (PRBXXXXXXX) to the field **Duplicate of** in the **Resolution Information** section of the **Details** tab.

3. Close the red warning banner and then click **Mark Duplicate** again to close this record.

This auto-populates the fields of **Marked duplicate by** with the processor's name, **Marked duplicate** with the current date, and **Resolution code** as Duplicated.

It also closes the newly created Problem record and changes the state of the Problem record to **Closed**.

1. Coordinator Validates the Problem
Problem Management

Notes ⚠

Examples of scenario 2 are:

1. Lack of resource an/or budget for further investigation
2. Resolution cannot be found within reasonable investment
3. There is no resolution

1c Reject the Problem if it's invalid (if applicable)

Scenario 2 There is lack of reason to continue the work.

Steps:

1. Click **Cancel**.

2. Provide reason of cancelation in the field **Canceled reason** in the **Resolution Information** section in **Details** tab.

3. Close the red warning banner and then click **Cancel** again to close this record.

This auto-populates the fields of **Canceled by** with the processor's name, **Canceled** with the current date, and **Resolution code** as Canceled. It also closes the record and changes the state of the Problem record to **Closed**.

2. Coordinator Prioritizes, Categorizes, and Assigns the Problem
Problem Management

2a Verify and change the priority if necessary

Step 1

Verify whether the chosen priority level is accurate.

If not, click **Priority** and choose the correct level from the dropdown list.

Step 2

Select **Message type** as **Internal Info** and enter the reason for the priority adjustment in the **Message** filed.

Step 3

Click **Save** to post the internal notes and update the record.

Notes	⚠

Priorities

Priorities are categorized into the following 4 levels.
- 1 – Very High
- 2 – High
- 3 – Medium
- 4 – Low

WORK INSTRUCTIONS, PROCESSES, SYSTEMS

2. Coordinator Prioritizes, Categorizes, and Assigns the Problem
Problem Management

2b Add relevant stakeholders to the Watch list and/or Internal note list and update Internal/External info

Step 1

Add all relevant stakeholders to the **Watch list** and/or **Internal notes list**.

Step 2

Select the applicable **Message type** based on the type of the audience for the information and update.

Step 3

Write down the information and update as **Internal Info** and/or **External Info** accordingly in the Message field.

Step 4

Click **Save** to update the record. The system will automatically send notification email regarding the new message to the corresponding lists based on the **Message type**.

○ PRB0041155 ✕ ✛

○ Details

[DEMO] - WIPS Problem Management Instructions
Priority 3 - Medium   **State** Assess   **Component** CEC-PRO-GIY
Assignment group CX Gigya 1st Level

4 Save   Assign to Me

Details   Incidents   Cases   Code Correction Issues   Problem Tasks   Attached Knowledge   Attachments   Special H

Communication ⌃

2 Message type
External Info ▾

Message ✳
Font Family   B   U   Paragraph ▾   ✂ ⧉ ⧉ ⧉ I✕ ↩ ↪
☰ ▾ ☰ ▾ ⇤ ⇥ 🔗 📖 ⤢

3 The external info will be sent to both stakeholders listed in the Watch list AND stakeholders listed in Internal notes list.

The internal info will be sent to only the stakeholders listed in Internal notes list.

Watch list   Internal notes list
1 Ha Tran ✕   Blanca Serrano ✕   Marcia Luna ... ✕   Wei Wei ✕   Christian Cast... ✕

Details ⌃

Requested by   Priority
CS20190000057268   ⓘ 🔍   3 - Medium ▾

Component ✳   Assignment group
CEC-PRO-GIY   ⓘ 🔍   CX Gigya 1st Level   ⓘ 🔍

Notes ⚠

The message types are categorized and explained as follows:

- **Draft**: message that is not ready to be sent

- **Internal Info**: message that is sent to stakeholders listed in **Internal notes list only** and remains within the current record

- **External Info**: message that is sent to stakeholders listed in **both Watch list and Internal notes list** and is displayed in the source record as Internal Info (if any).

2. Coordinator Prioritizes, Categorizes, and Assigns the Problem
Problem Management

2c Confirm the record to start Root Cause Analysis

Step 1

Click **Confirm** to approve that this Problem record is valid for further investigation.

This changes the state of the Problem record to **Root Cause Analysis**.

2. Coordinator Prioritizes, Categorizes, and Assigns the Problem
Problem Management

2d Assign the Problem to the processor to work on the reported issue

Step 1

Add the processor that will start to work on this Problem record to the **Assigned to** field.

Alternatively, the Coordinator may also assign the record to the group that is going to process the record by changing the **Assignment group** field. Processors in this new group will either self-select or be assigned to this record afterwards.

Step 2

Select **Internal Info** as the **Message type** and inform the processor to provide workaround in the **Message** field.

Step 3

Click **Save** to post the internal information to the record.

WORK INSTRUCTIONS, PROCESSES, SYSTEMS

2. Coordinator Prioritizes, Categorizes, and Assigns the Problem
Problem Management

2d Assign the Problem to the processor to work on the reported issue

The processor is notified via emails about the new assignment and the next steps.

Subject:	[INFO] Assigned To has changed for PRB0041155
From:	ITSM Notification Test
To:	christian.castelo.branco@sap.com

Hide email details

THE BEST RUN SAP

INTERNAL
Dear Colleagues,

Please note that the problem has been changed.

New Assigned To: Nadia Xavier

Previous Assigned To:

TAKE ME TO THE PROBLEM

Basic problem information at a glance:

Problem number:	PRB0041155
Short description:	[DEMO] - WIPS Problem Management Instructions
Component:	CEC-PRO-GIY
Assignment Group:	CX Gigya 1st Level
Priority:	3 - Medium
State:	Root Cause Analysis
Action Status:	

Best regards,

Your Notification Service

Note: Your answer to this email will be logged in the above record as an Internal Info.

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Subject:	[INFO] Problem work notes added for PRB0041155
From:	ITSM Notification Test
To:	christian.castelo.branco@sap.com

Hide email details

THE BEST RUN SAP

INTERNAL
Dear Colleagues,

Please note that a relevant change has been made to the Problem.

New Work Note:

2019-11-18 09:33:56 GMT - Wei Wei   Internal Info

inform the processor/processing group for the next steps.

TAKE ME TO THE PROBLEM

Basic case information at a glance:

Problem number:	PRB0041155
Short description:	[DEMO- - WIPS Problem Management Instructions
Customer:	
Component:	CEC-PRO-GIY
Priority:	3 - Medium
State:	Root Cause Analysis
Action Status:	
Contract :	

Best regards,

Your Notification Service

Note: Your answer to this email will be logged in the above record as an Internal Info.

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Change Log
Problem Management – Validate, Prioritize, Categorize, and Assign a Problem

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Ramya B	July 17,2019	▪ WIPS 4.0 Initial document	Released
2.0.0	Wei Wei	Nov 12, 2019	▪ WIPS 4.0 Golden Standard Baseline Document	Released