SaE for Existing Cases Overview

- Customers can create an SaE session directly from an open Case to allow them to discuss details of the Case with the processor at a time that is convenient for both the customer and Case processor
- The customers who book the appointments must have "create Case" authorization on the SAP Launchpad and a valid maintenance frame.
- SaE on Existing Cases is available for Cases with:
    - Priority High (P2), Medium (P3) and Low (P4)
    - A processor assigned
    - Processing organization in Product Support
- Case processor's availability is based off SaE availability and the Max. SaE Sessions Per Day/week settings in RCC
- The first available sessions can be booked a minimum of 1 business day in advance, giving the processor at least 1 full business day to get prepared for the SaE session
- Sessions are offered in a planning horizon of 2 weeks

Getting started

Setup for being available to deliver Schedule an Expert for open incidents is the same as for new Schedule an Expert sessions. Please click the links for full details on the following required steps.

1. Self-Assignment to expert areas in BCP
2. Maintain availability in RCC

What to do when a SaE session is booked

1. Prepare for delivering SaE session
2. Receive SaE session booking notification
3. Check if duplicate booking of SaE session exists
4. Call customer for details/set expectations
5. Generate and send Skype Meeting URL
6. Continue the conversation about the incident topic with customer within the incident if necessary.
7. Deliver SaE session
8. Update the status of the Case accordingly

Handing over a session for an existing Case

During preparation for the upcoming SaE session, it may turn out the case belongs to another component. In such cases follow the normal Schedule an Expert handover process as documented here.

Note

A warm handover is **mandatory** for Schedule an Expert sessions booked for Existing Cases.

Rescheduling sessions

Reschedule by customer:

At this time, customers are not able to reschedule a Schedule an Expert session booked for an existing case through the tool.

Reschedule by SAP:

At this time it is not possible to reschedule through the tool so the following steps must be taken:

1. Call customer to inform him/her of reason for reschedule and agree on a new date/time for the session
2. Join session with Skype meeting information generated by case processor at the new agreed date/time

Note

Do not cancel the session in case it is held in a different time!

A traditional SaE and SaE for Existing Cases sessions are booked for the same topic

1. Find out if there is any duplicate Case for the case by clicking on Customer name in the General Details/Customer Data section of the Case, and check existing Case from customer in the popup window. In case you find Case with low priority, check if it is a SaE Case.
2. Find the processor of the duplicate Case
3. Agree on the ownership of the case
4. If processors agree:
   a. Keep the Case with the upcoming SaE session, and close the duplicate Case and cancel the corresponding SaE session with informing the customer. Follow normal Schedule an Expert cancellation process as documented here.
   b. Provide the SaE session
5. In case it cannot be decided clearly, who should deliver the SaE session:
   a. The SaE appointment booked for the existing Case should be provided
   b. Keep the Case with the upcoming SaE session, and close the duplicate Case and cancel the corresponding SaE session with informing the customer. Follow normal Schedule an Expert cancellation process as documented here.

Note

Call the customer, to communicate about the SaE session that will be cancelled .

Case with booked SaE for Existing Case session is raised to Very High

In case the High/ Medium/ Low priority Case that has a SaE for Existing Case session booked to it is raised to Very High priority, SaE session has to be cancelled:

- by the original processor of the Case, in case it happens during office hours
- by the Queue Manager, in case the priority is raised outside of the original processor's office hours

After cancellation of the SaE session, follow the P1 process.

Cancelling sessions

Cancel by customer:

Customers can cancel sessions directly through the booking tool. You will receive a notification that the customer has cancelled the SaE session. Therefore the following steps must be taken to find out how the customer wants to proceed with the Case.

1. Call customer to find out why they've cancelled the session and act accordingly
    a. If issue is solved, request they confirm the Case
    b. If issue is still open, put the Case back in process and proceed as a normal Case
    c. If customer cancels the SaE session because they need to reschedule for a different date/time, ask the Customer to book a new session

Cancel by SAP: :

Follow normal Schedule an Expert cancellation process as documented here.

What else can happen?

The session has ended but further analysis/troubleshooting is needed by SAP

Session should be transferred back to be worked as an Case. Follow the normal process for SaE session can't be completed within 30 minutes

The Case needs to be forwarded to another organization (AIS, development) before the SaE session happens

1. Call the customer and inform them that their issue must be moved to the next level where Schedule an Expert is not supported. Their session will be cancelled and worked as a normal Case
2. Cancel the session

How do I handle consulting topics? What if I've already spent the allotted time on a consulting discussion with the customer?

- If consulting note 83020 has been attached, this indicates it was a consulting issue before the SaE session was scheduled and customer should be informed that SaE is not meant to be a consulting platform.
- If consulting note 83020 has NOT been attached, use your best judgement to determine how to move forward and what expectations to set with the customer around consulting
- Follow the SaE consulting WIPS

Customer has multiple questions in SaE session

Ask customer to create a new SaE / Case for the new questions.

Questions about other Cases

Direct the customer to CIC

Change Log

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

Firstname Lastname, Location
Process owner

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Christine Osborn	Apr 27, 2018	▪ Initial Document	Draft
1.0.1	Melinda Ludany	May 17, 2018	▪ Final document	Released
1.0.2	Laszlo Dobos	Sep 11, 2018	▪ Extending slide 3, "What to do when a SaE session is booked"	Released
1.0.3	Laszlo Dobos	May 14, 2019	▪ Slide 1 - P3 and P4 incidents are eligible under certain circumstances for SaE for open incidents	Released
2.0.0	Leonardo Reginato	Nov 18, 2019	▪ Initial document incorporating Service Now	Draft