Handover a session to another colleague

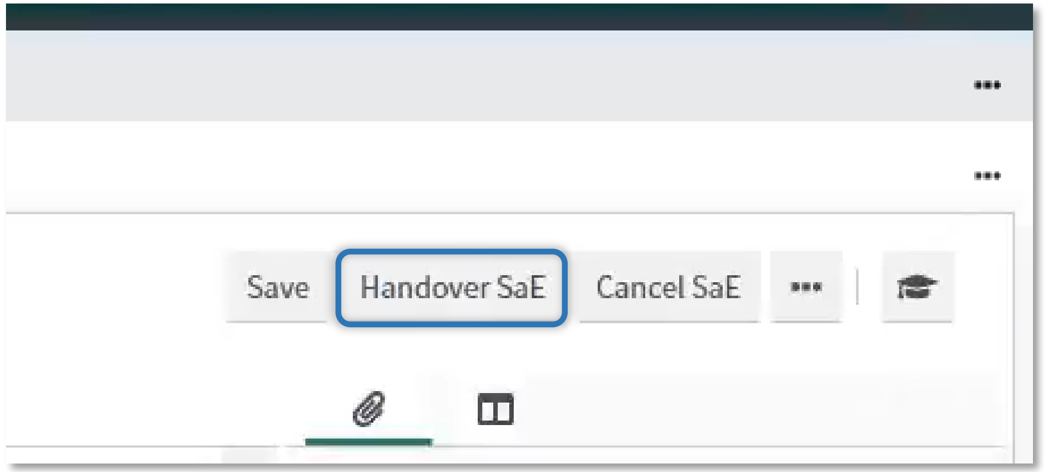
Please use the following steps:

1. In the Case screen, go to the Details tab -> Communications section.
2. Select the Message Type “Internal Info” and then write the reason for handover.
3. If the reason for handover is for moving to another component, edit the Service Now case and change the component field. Save the Case.
4. In Service Now, select the Appointment > Handover SaE. There are two possible scenarios.

Click the hyperlinks below to navigate to the page for detailed steps on each process:

a) Engineer available at the same session date/time
   - Engineers available at the same time is determined by the system checking RCC for engineers availability. It does not take into account the 3 day booking lead time or max day/week thresholds.

b) No Engineer available



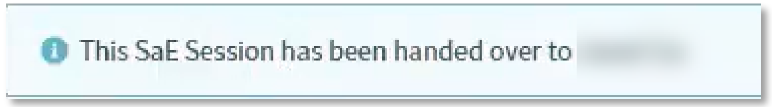
Handover a session to another colleague – Engineer Available

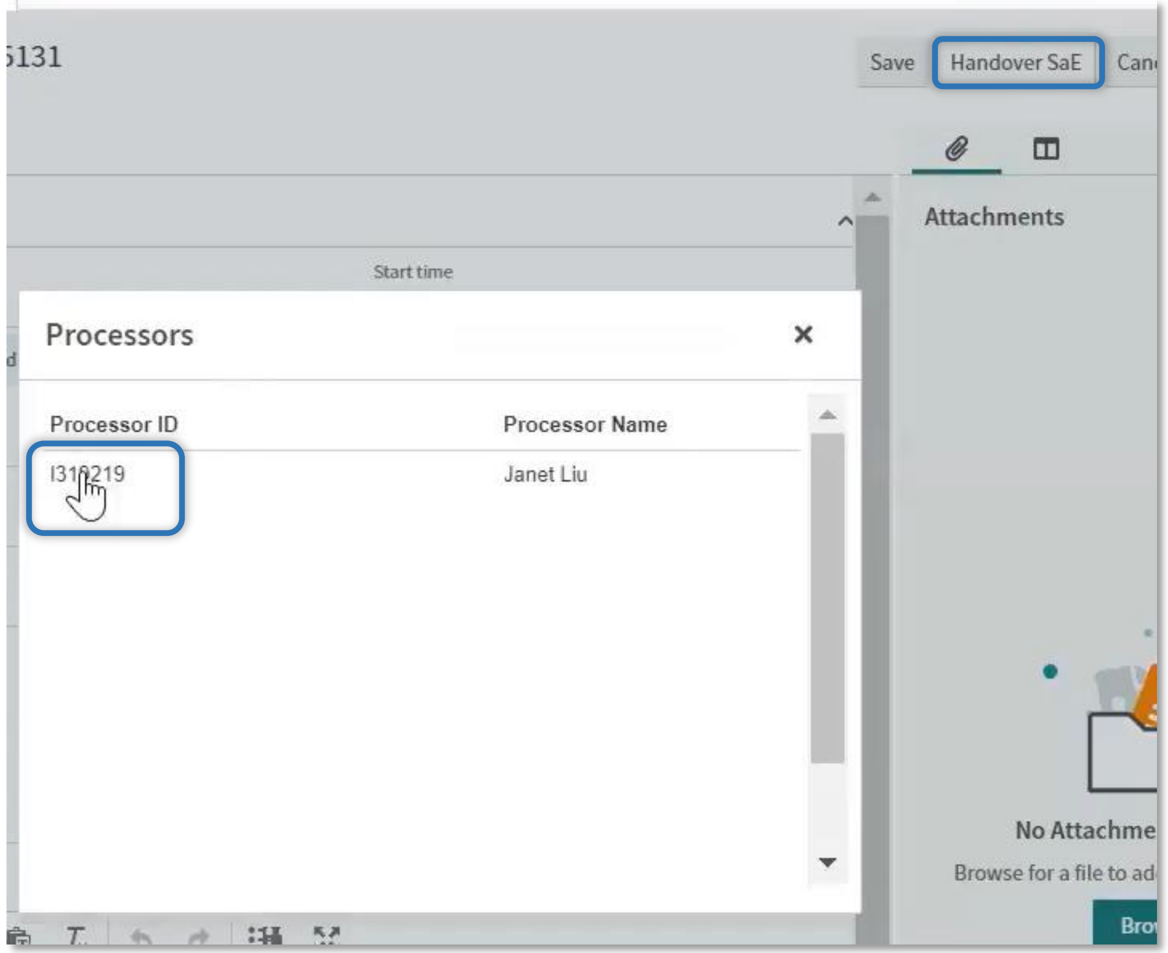
If after trigging a SaE Handover and Experts are available for the session at the same time, please follow the steps below.

Is the session date 3 or more days in advance?

YES:

1. Click in the *Processor ID* you would like to handover under the *Processors* list.
2. The new processor will be notified via email of the upcoming SaE session. Both engineers availabilities will be updated in RCC to reflect the change.
3. The Case and Appointment will automatically be assigned to the new engineer.





NO:

A warm handover is required if the session is less than 3 days in advance.

1. Contact the engineer listed as available at the same date and time.
2. If they agree to take the session, click on the *Processor ID* to assign the Engineer to the Appointment.
3. If they do not agree to take the session, proceed to the process for No Engineer available

Handover a session to another colleague – Engineer Not Available

If after trigging a SaE Handover engineers are Not Available, please follow the steps below.

1. The Queue Manager on the target component will be responsible for finding someone to take over session.
2. In case the QM can't find someone to take over the session, they should contact the STMs in the target component for support.

Notes

Please see the Queue Manager for Schedule an Expert section for full QM details

Queue Management for Schedule an Expert

It is the responsibility of the QM for finding a processor to take over an unassigned SaE session. Please refer to the QM Documentation for full details on setting up Queue Management for Schedule an Expert.

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	Ramon Gupta	May 9 2017	▪ Initial document	Released
1.0.1	Christine Fikany	Jun 8, 2017	▪ Added "Attach KBA 2484024 – Schedule an Expert session has been delivered to the incident…" ▪ Modified Step 2 – "If SaE is not offered in the component chosen or if you are unable to get an expert on this component" by adding sub steps 3-6	Released
1.0.2	Christine Fikany	Aug 10, 2017	▪ Slide 3 – added a screen shot for accessing RCC settings ▪ Separated slide 10 into two slides for managing unforeseen events. Added handling sick days and customer requests increase in priority to this slide ▪ Added new slide 21 – SaE session needs to be cancelled. Removed cancellation process from slide 19. ▪ Modified reschedule process in slide 20 by removing the comment "send the customer some open times you see in the SaE scheduling option…" ▪ Modified slide 14 to reflect new cancellation process. ▪ Added slide 23 for handling sick days. ▪ Added slide 24 for customer requests increase in priority of session	Released
1.1.0	Christine Fikany	Sep 29, 2017	▪ New "Handover, Rescheduling, and Canceling SaE session" Slide sequence ▪ Modification to slide 7 – "customer reschedule session", to add steps for rescheduling if the same processor does not get assigned to the session	Released
1.1.1	Christine Fikany	Oct 26, 2017	▪ Modified slide 9 - To cancel the session in BCP, in read only mode, go to the Routing-> Cancel SaE Session	Released
1.1.2	Christine Fikany	Nov 15, 2017	▪ New Hand over process created – slides 2-7	Released
1.1.3	Christine Fikany	Nov 29, 2017	▪ Slide 4 – removed requirement to notify STMs ▪ Slide 7 – added hyperlink to QM WIPS ▪ Slide 8 - deleted	Released
1.1.4	Christine Fikany	Dec 11, 2017	▪ Slide 16 added – The session is not delivered (for any reason by customer or SAP)	Released
2.0.0	Christine Osborn	Mar 13, 2018	▪ Broke content out into smaller section, no major content changes	Released
2.0.1	Christine Osborn	Apr 4, 2018	▪ Simplified QM section and modified link from QM WIPS to QM Jam	Released
2.0.2	Lszlo Dobos	Sep 13, 2018	▪ Slide 3 – adding the step to reroute the incident to the correct processing org, if necessary	Released
3.0.0	Leonardo Reginato	Oct 7, 2019	▪ Initial document incorporating Service Now	Draft