Investigate and Diagnose the Issue
At A Glance

Incident Management Process

| Log a Incident | → | Categorize a Incident | → | **Investigate and Diagnose**
Investigate and Diagnose the Issue | → | Resolve and Recover | → | Validate and Close |

Purpose

The incident processor investigates the issue reported in the Incident in order to determine the best course for correction and resolution. The incident processor may also involve additional expertise to help diagnose the issue if necessary.

Notes ⚠
The methods described below can be performed at any point of time. The incident processor should prioritize the sequence and choose the applicable methods according to the need of the Incident.

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1. Explore Knowledge Sources

Option A: Search within NOW system for all records with similar issues

1a Open Agent Intelligence in the Incident record

1b Review recommended NOW records based on current Incident's subject

1c Adjust search terms if necessary

Option B: Search using xSearch and/or ISM across various repositories for knowledge articles and records

1a Open xSearch in the incident record

1b Review recommended NOW records based on current Incident's subject

1c Adjust search terms if necessary

1d View full article

1e Add article in the Incident record

2. Access Customer System (if incident is created via Case)

Issue relates to Cloud product

2a In Incident record, then access the Cloud Access Manager (CAM) through the link provided in Incident and request for access

2b Perform investigation in the customer's system

Notes ⚠
When exploring knowledge sources for a solution, a permanent solution may not be found. If a workaround solution is found to restore service to the requestor, send the workaround solution, as a resolution to the requestor in resolve and recover step for acceptance. A problem record should be opened for a solution and related to the incident record.

3. Involve Additional Expertise (if necessary)

Scenario 1: Forward to Next Level

3a Click forward to next level

Scenario 2: Creating Problem Record

3a Create Problem record

3b Fill in all relevant information in the new record

3c Save the record

3d Continue working in the Incident

Scenario 3: SPC Handover to Operations

3a Navigate to Assignment Group

3b Fill in Message field

3c Save the record

3d Incident Record changes

3e Incident Processing resumes

4. Bundle Incident and Major Incident (if necessary)

Scenario 1: Bundle with new Major Incident

4a Create Major Incident

4b Fill in mandatory fields and save record

4c Open the Incident, which will be linked to the existing Major Incident

Scenario 2: Bundle with existing Major Incident

4a Search for an existing Major Incident with the same reported issue

4b Open the Incident, which will be linked to the existing Major Incident

4c Check that Incident is a child Incident of a Major Incident

5. Pause and Resume Investigation (if necessary)

Pause and Resume

5a Pause Investigation

5b Resume Investigation

1.Explore Knowledge Sources
Incident Management

Option A: Search within Agent Intelligence system for all records with similar issue

1a Open Agent Intelligence in the Incident record
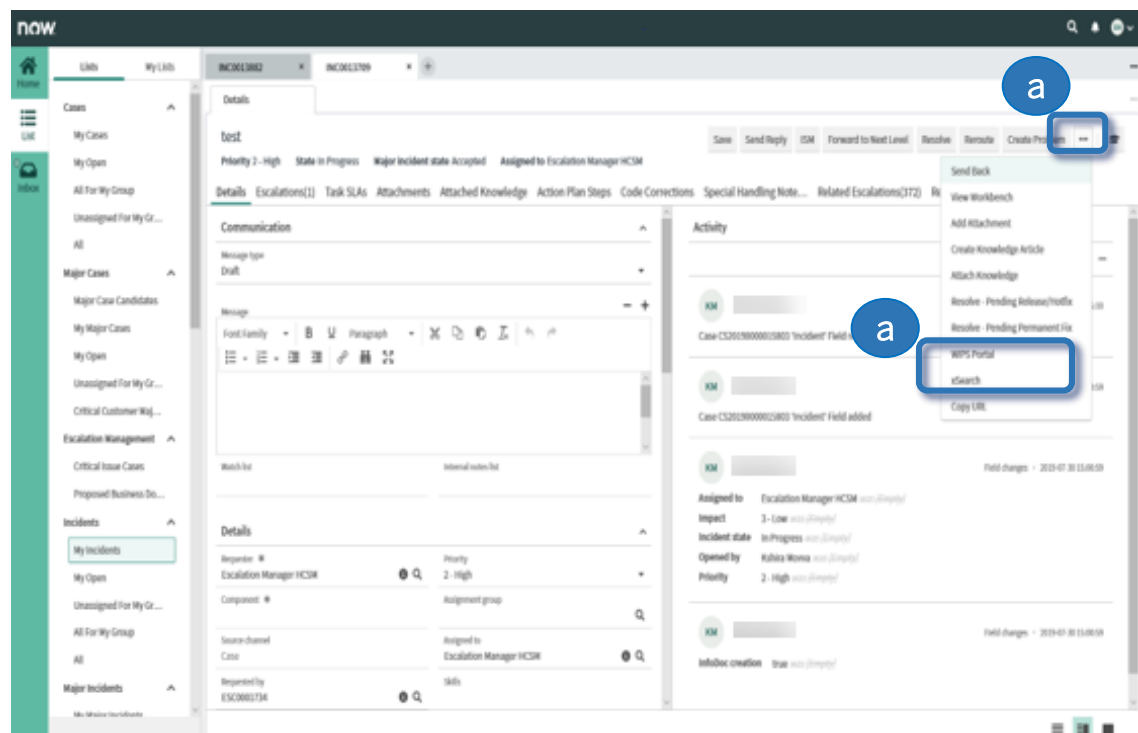
Click in Agent Assistant icon.

Search results automatically display based on an administrator-configured field, such as the short description.

1b Review recommended records based on current Incident's subject

Identifying how similar situations has been resolved, may bring insights to solve the Incident.

1c Adjust search terms if necessary

If no relevant search results are returned, try removing or adjusting the keywords in the search bar.
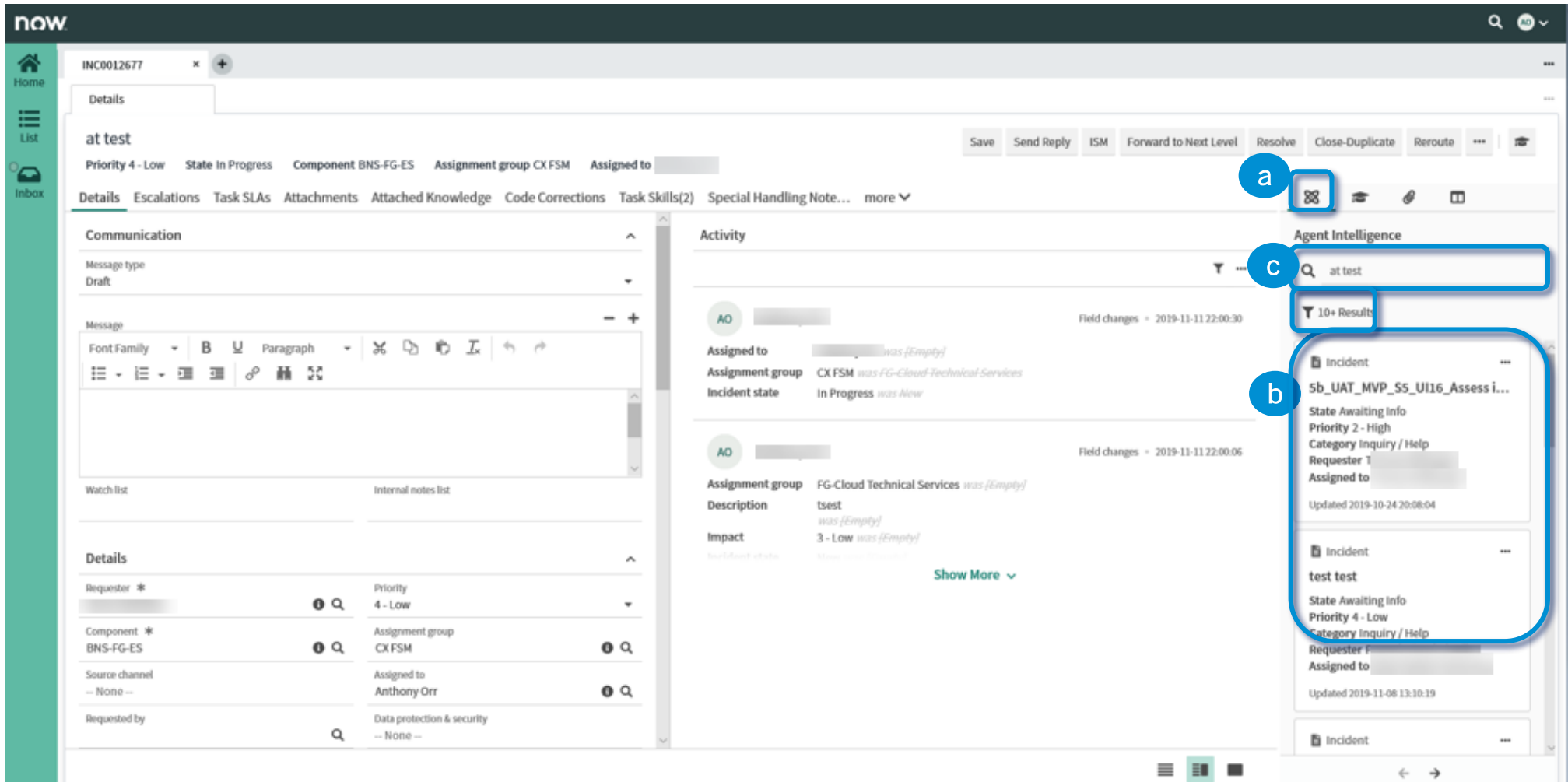
Notes ⚠

Agent Intelligence
Search results returned similar Case, Incident and Problem records.

When launched from within an Incident, the description and component from the incident is populated as the search terms and component filter

1. Explore Knowledge Sources
Incident Management

Option B: Search using xSearch and/or ISM across various repositories for knowledge articles and records

xSearch

1a Open **xSearch** in Incident record

From the Incident window click More UI Actions Icon (...)
And click **xSearch** from the menu

Notes ⚠️

xSearch
ServiceNow integrates with SAP xSearch, which can be launched from within a Incident

When launched from within a Incident, the description and component from the incident is populated as the search terms and component filter

1b Review list of recommended articles

A new window is loaded displaying Search Results: Defaults on SAP Knowledge Base Articles results
a. Incident Description is used as the default search terms
b. Incident Component is added to the KBA Component Filter

1c Adjust search terms if needed

If no relevant search results are returned, try removing or expanding the component filter or adjusting the keywords

1. Explore Knowledge Sources
Incident Management

Option B: Search using xSearch and/or ISM across various repositories for knowledge articles and records

ISM

1a Open ISM from Incident

1. From the Incident window click the ISM button

1b Review list of recommended articles

2. A new window is loaded displaying search results:
   - Solutions returns a list of KBAs and SAP Notes
   - All the incident communication and all the information is used for searching is taken into account for searching and brings solutions based on artificial intelligent.

1c Adjust search terms

3. If no relevant search results are returned, try removing or expanding the component filter or adjusting the keywords

1d View full article

4. Click on the KBA title in search results to view. A new browser tab is opened with the KBA
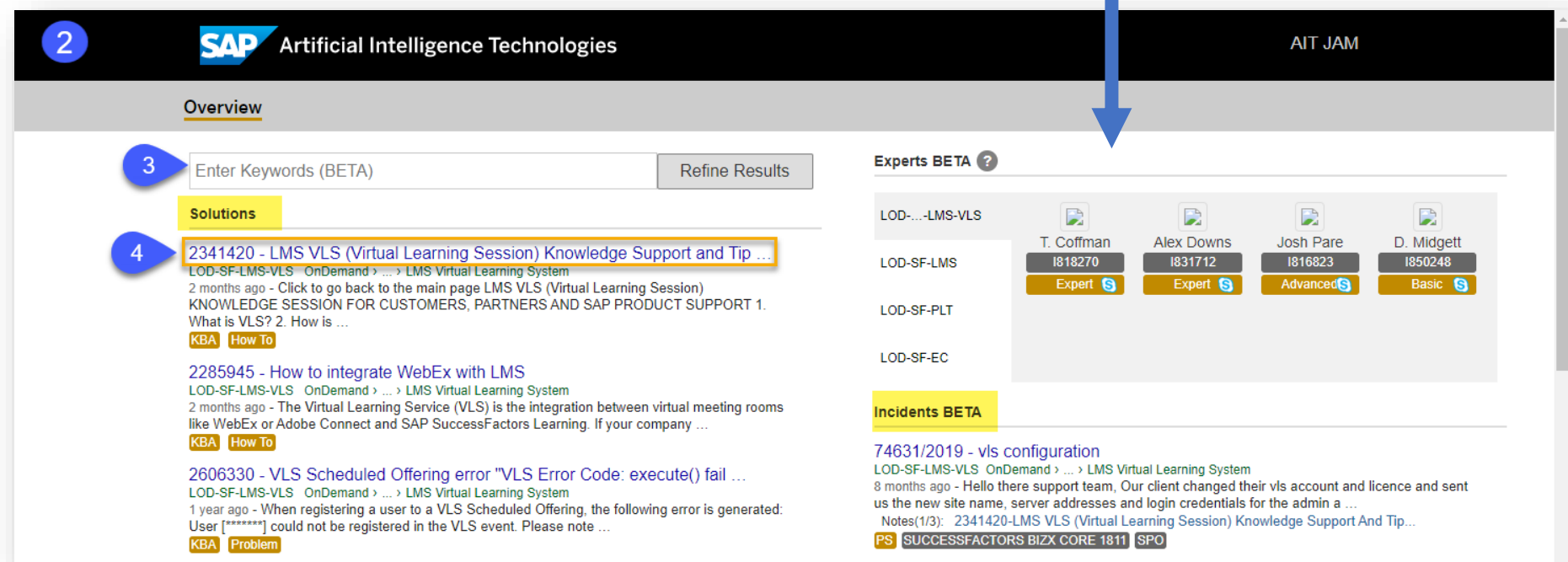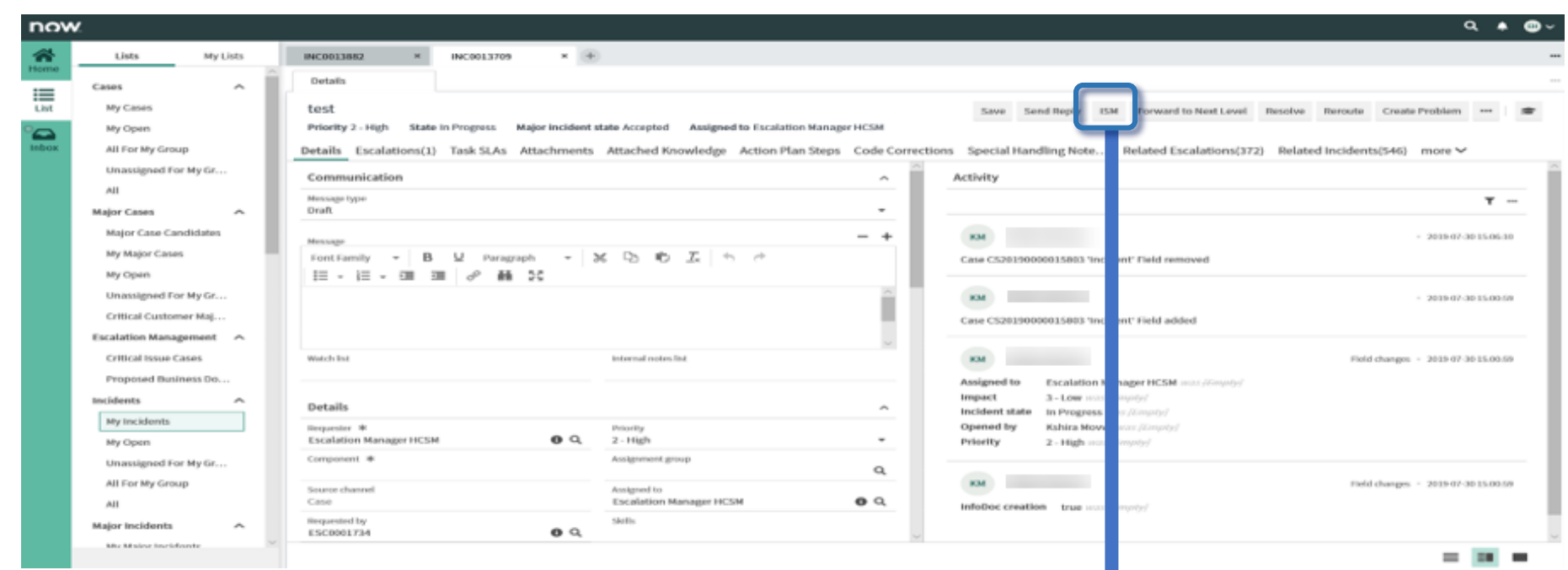
> **Notes** ⚠
> - KBAs cannot be attached to an Incident via the ISM search results. The KBA number will need to be copied and manually attached to the Incident.
> - ISM returns all SAP KBAs, Notes and past Incidents from the BCP system.

2. Access Customer System (if necessary)
Incident Management

Issue relates to Cloud product

2a From the incident record, then access the Cloud Access Manager (CAM) in the Details area

2b Perform investigation in the customer's system

3. Involve Additional Expertise
Incident Management

Scenario 1: The next processing level works in the Incident

3a Click Forward to Next Level

Fill in mandatory field - Message
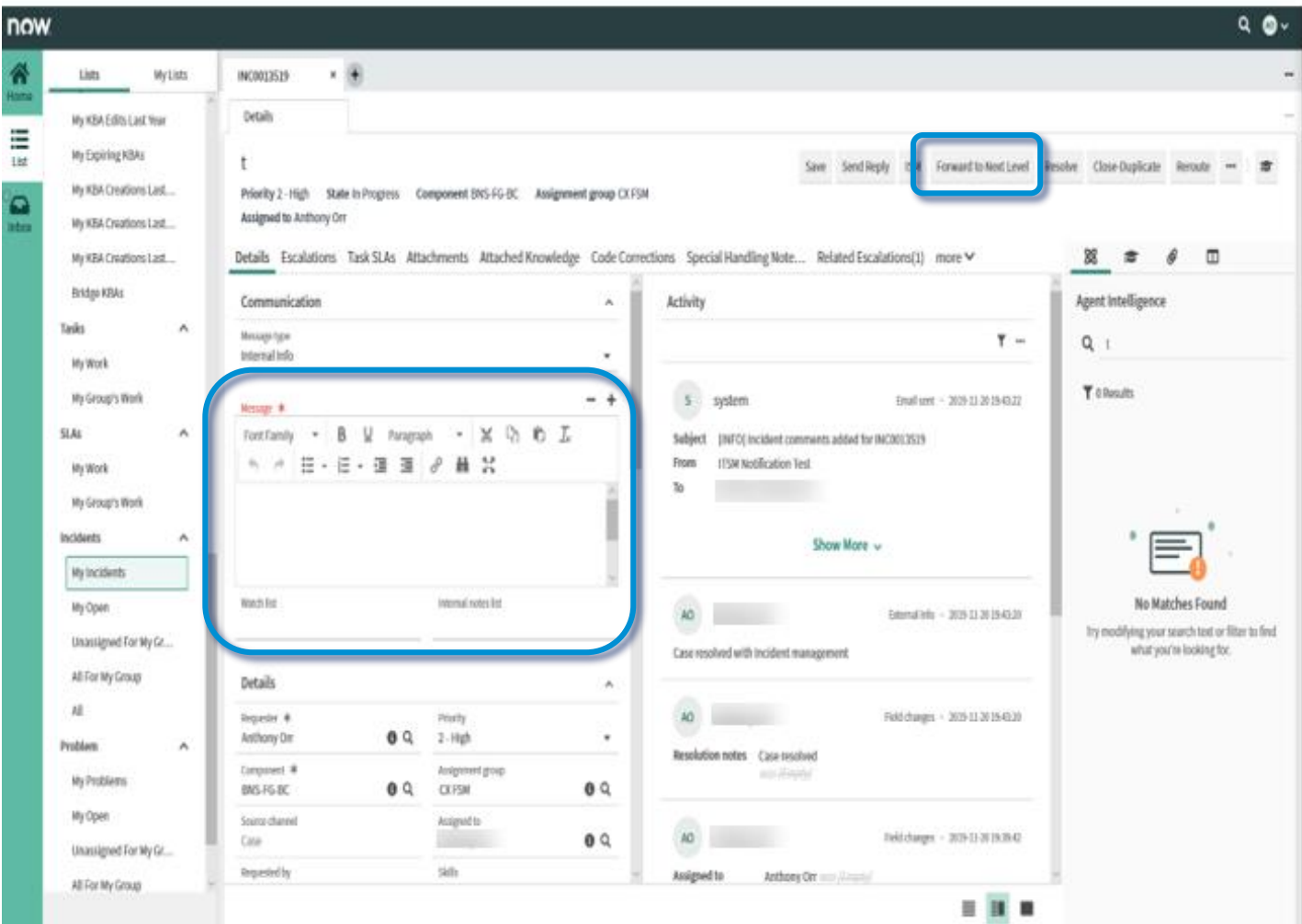
Notes ⚠️

Incident Processor communication
Incident Processor does not communicate with customer

Forward to next level
Forwards the incident to the next support group set up in the assignment rules chain
This only works if a next level exists; if not, you are not notified that forwarding is not possible

The Assignment group field is set up automatically, attending to the routing rules, so after Forward to Next Level , the Incident is routed to the pre defined next level of support

Reroute
Sends the incident back to the first group in the automatic assignment chain
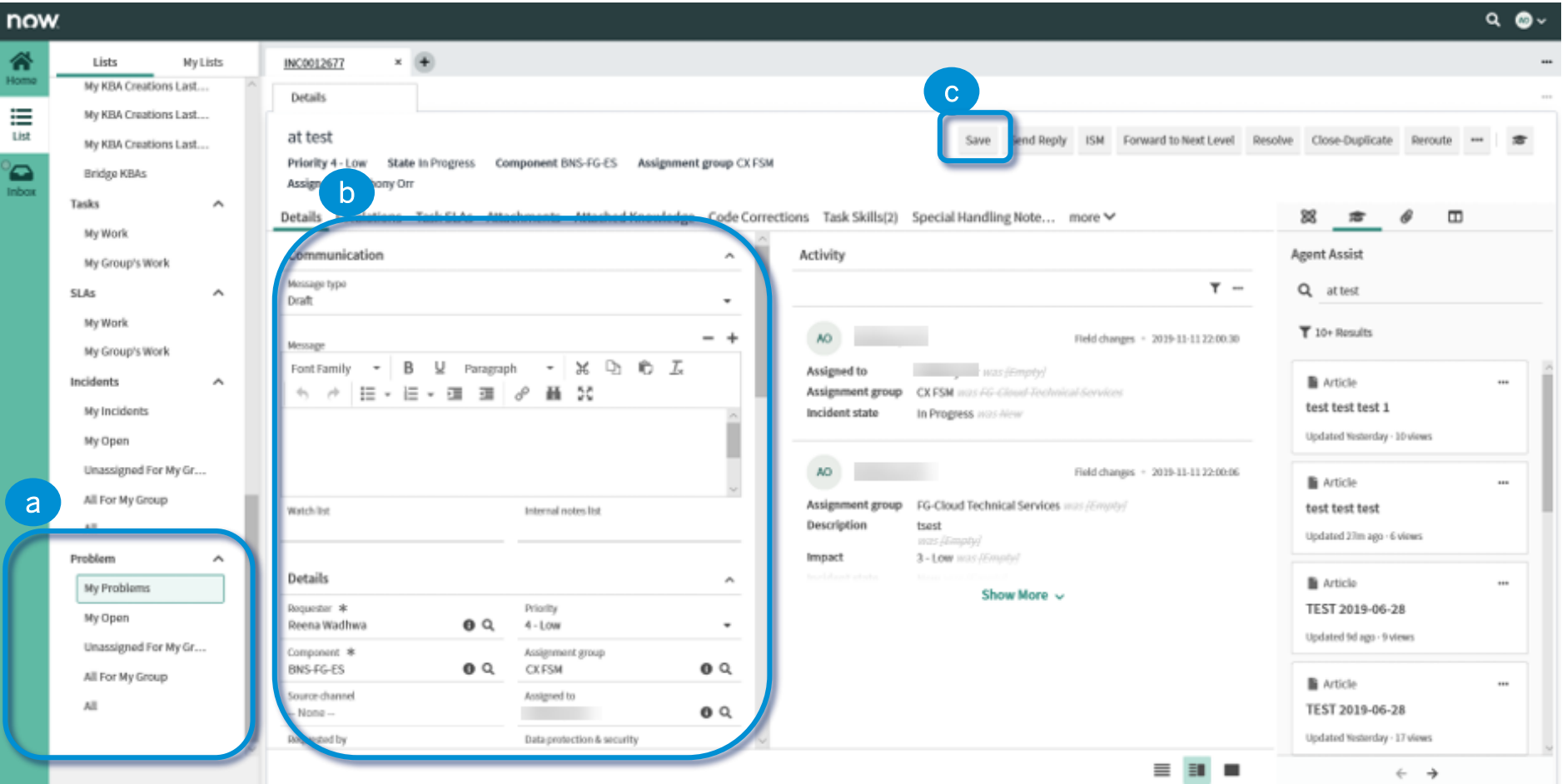
3. Involve Additional Expertise
Incident Management

Scenario 2: The next processing level does NOT work in the Incident, sent to Problem processor

3a Create Problem record **3b** Fill in all relevant information in the new record **3c** Save the record **3d** Continue working in the incident

Notes

Problem
Refer to Create Problem via Case/Incident Module
procedures for steps b, and c

Problem record creation
Purpose: to begin engagement with Scrum PM via a Problem Record, as the Incident cannot be resolved
Problem also, can create temporary workarounds to help with service restoration

Incident process and problem processor
The problem processor communicates with the requester (incident processor)

3. Involve Additional Expertise

Incident Management

Scenario 3: SPC handover to Operations

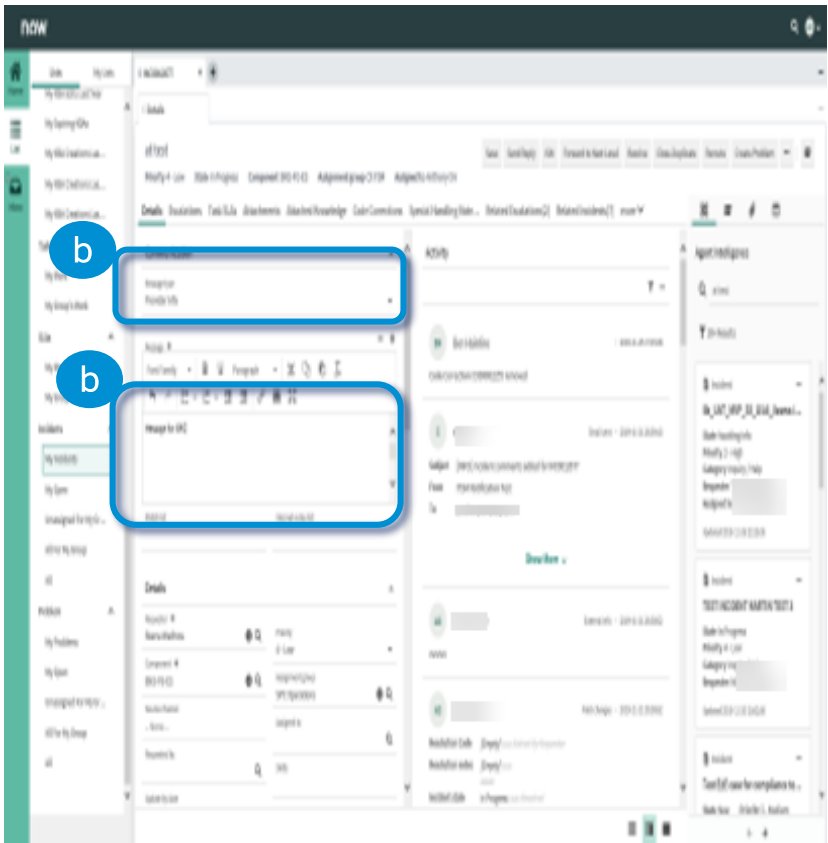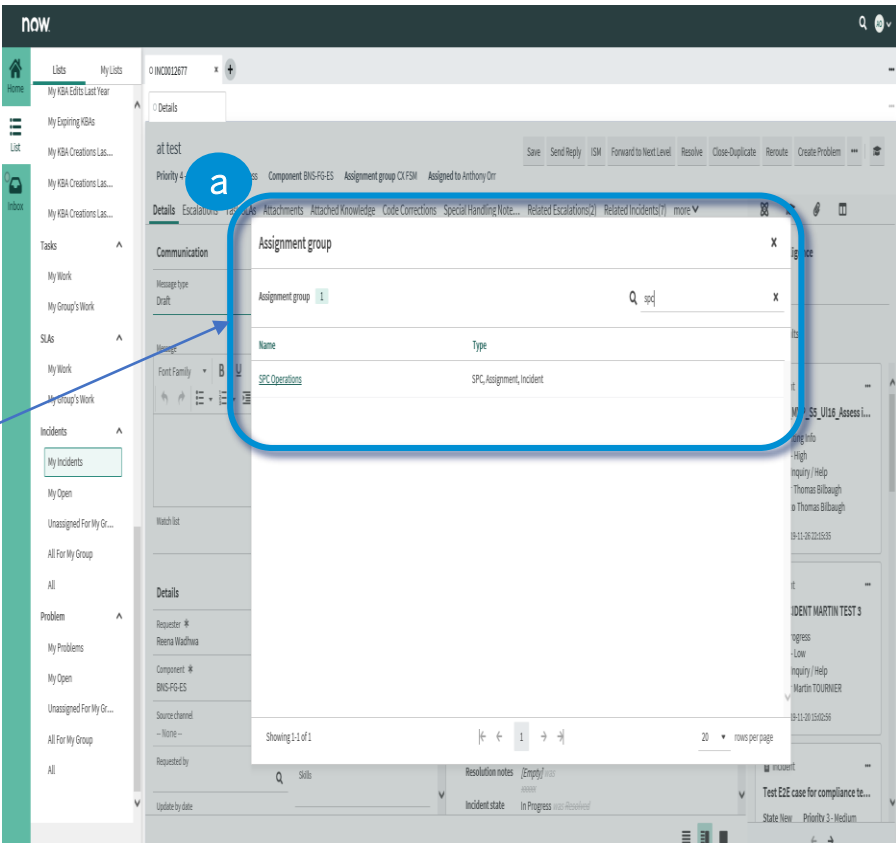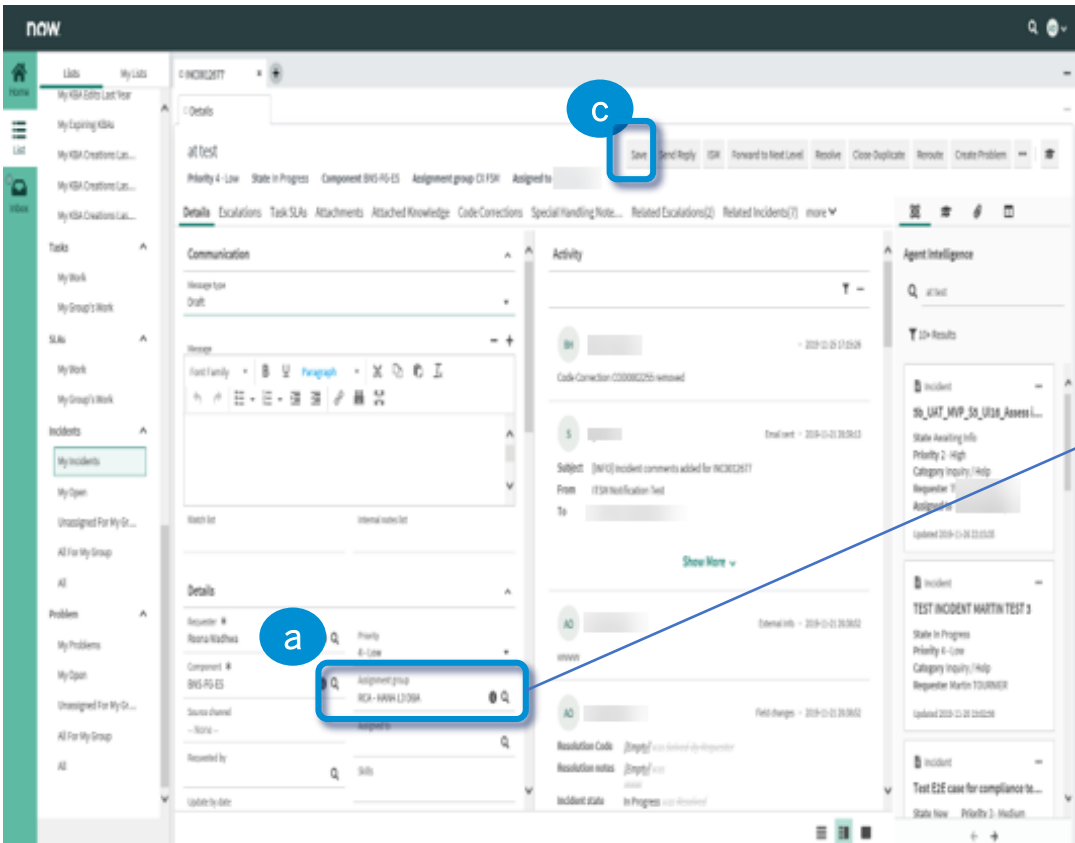**3a** Navigate to Assignment Group in Details
Click search icon
Select assignment group SPC Operations

3b Fill in Message field
Message type changes to Provider Info

3c Save the record
Information is sent to SPC for processing

3. Involve Additional Expertise

Incident Management

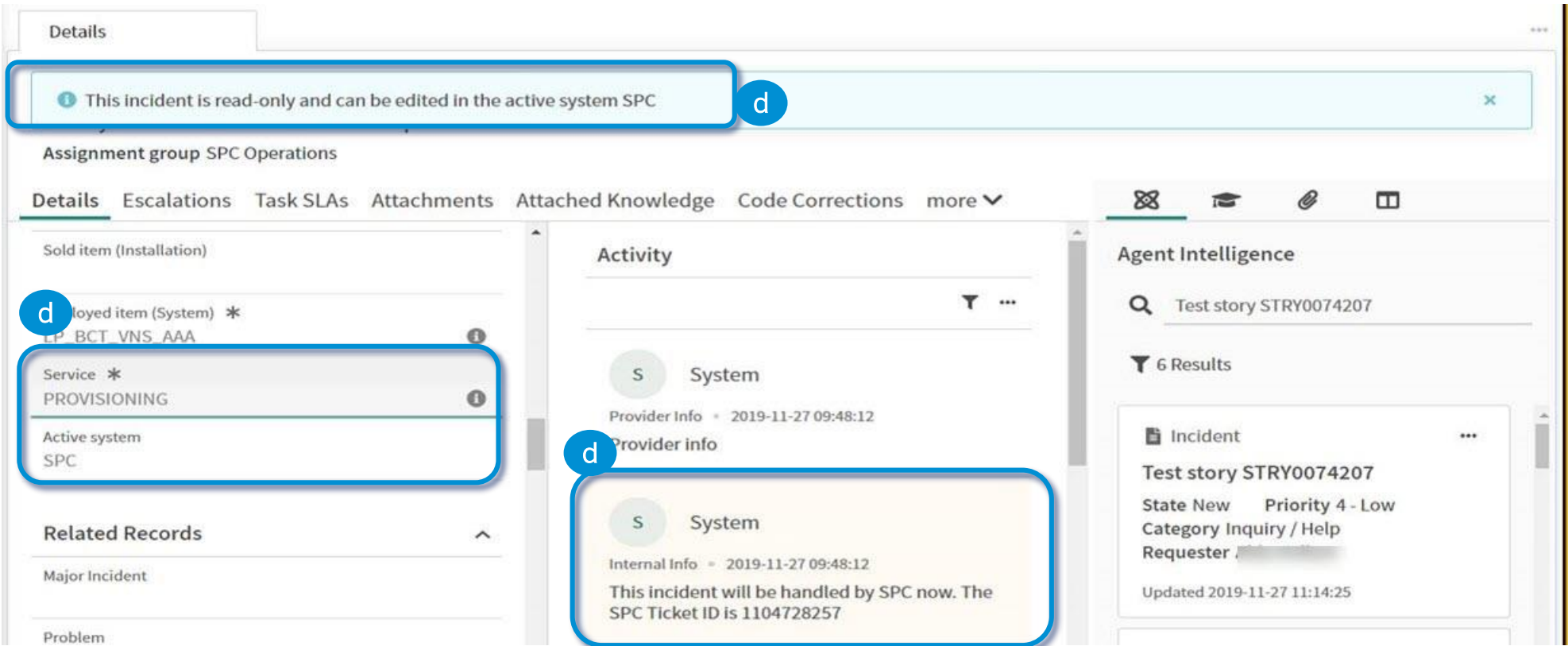### Scenario 3: SPC handover to Operations

3d Incident Record changes

Active system is changed to SPC

Service changed to Provisioning

State does not change

Ticket is created in SPC (see activity log)

Incident handled by SPC processor

3e Incident Processing resumes

SPC hands over resolution to incident

Resume Incident processing for resolution

4. Bundle Incident to Major Incident (if necessary)

Incident Management

Major Incident for bundling is the way to link Incident records with the same reported Incident issue, to assist in a collaborative effort for resolutions.

Scenario 1: Bundle with new Major Incident

4a Navigate to Major Incident
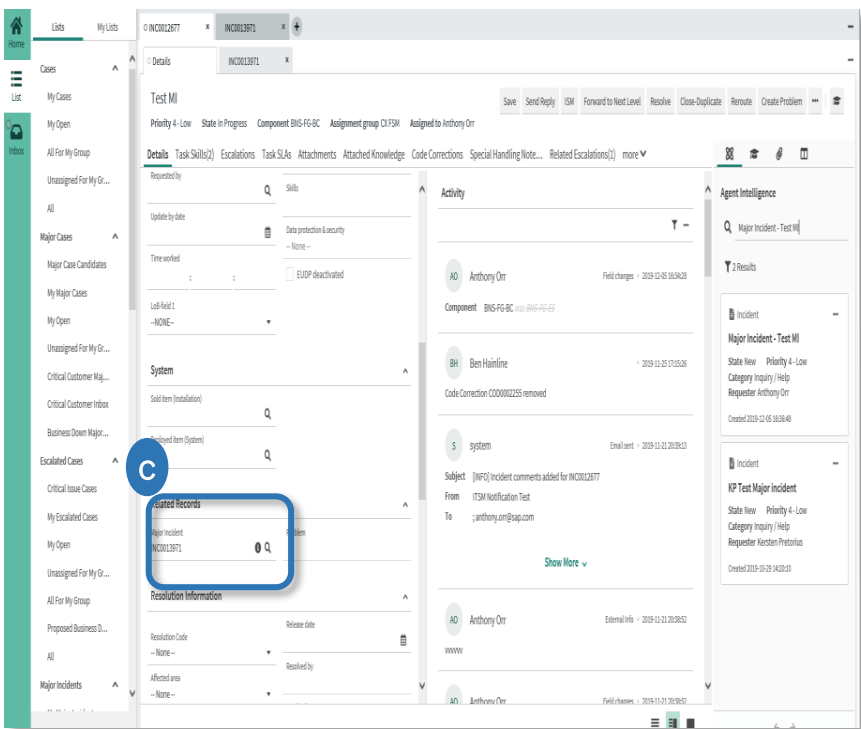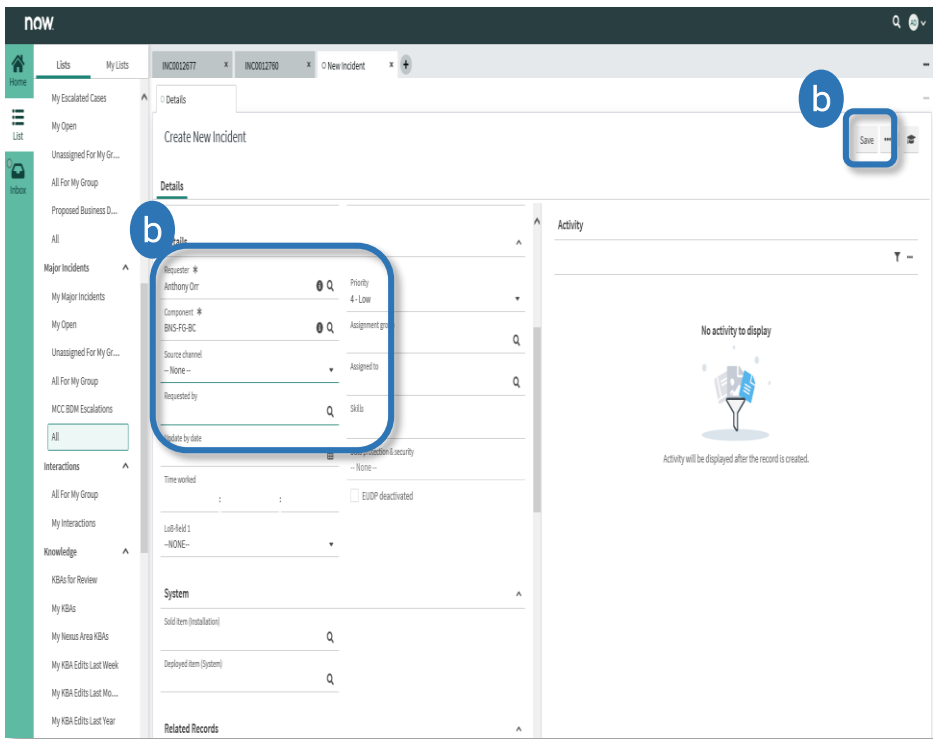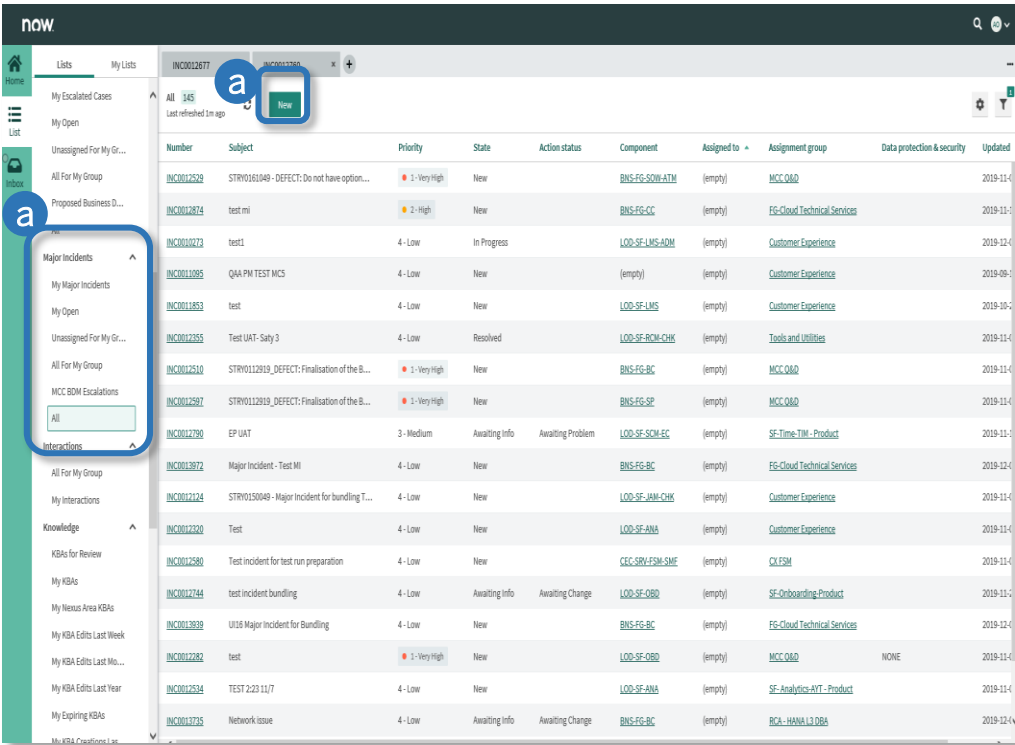
a. Click New

4b Fill out all mandatory fields

- Requestor
- Component
- Subject
- Description

Click Save

4c Open the Incident, which will be linked to the new Major Incident identified in Step a.

a. Enter the Major Incident number in the Major Incident field.
b. Click Save.

4. Bundle Incident to Major Incident (if necessary)

Incident Management

Major Incident for bundling is the way to link Incident records with the same reported Incident issue, to assist in a collaborative effort for resolutions.

Scenario 2: Bundle with existing Major Incident

**4a** Search for an existing Major Incident with the same reported issue by:

a. Use Agent Intelligent to identify a Major Incident Record.

4b Open the Incident, which will be linked to the existing Major Incident identified in Step a.

a. Enter the Major Incident number in the Major Incident field.
b. Click Save.

4c Check that Incident is a child Incident of a Major Incident.

a. Open Major Incident
b. Navigate to more tab, click on Child incidents
c. Check incident number
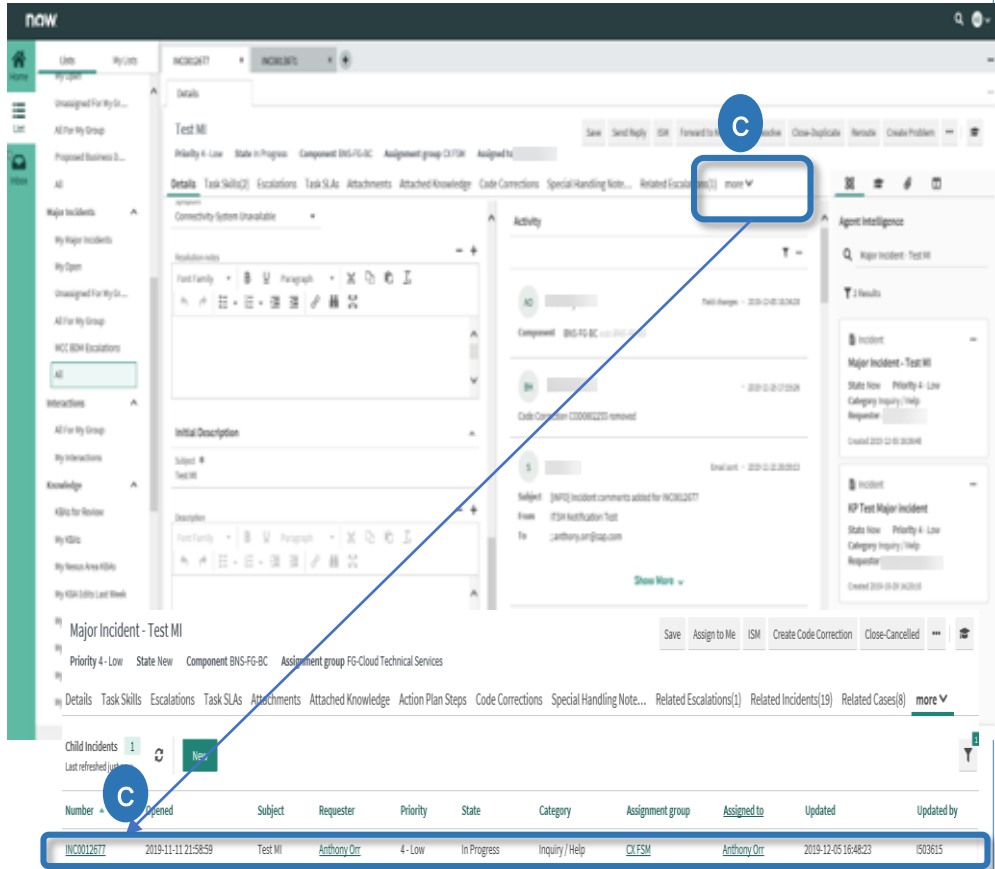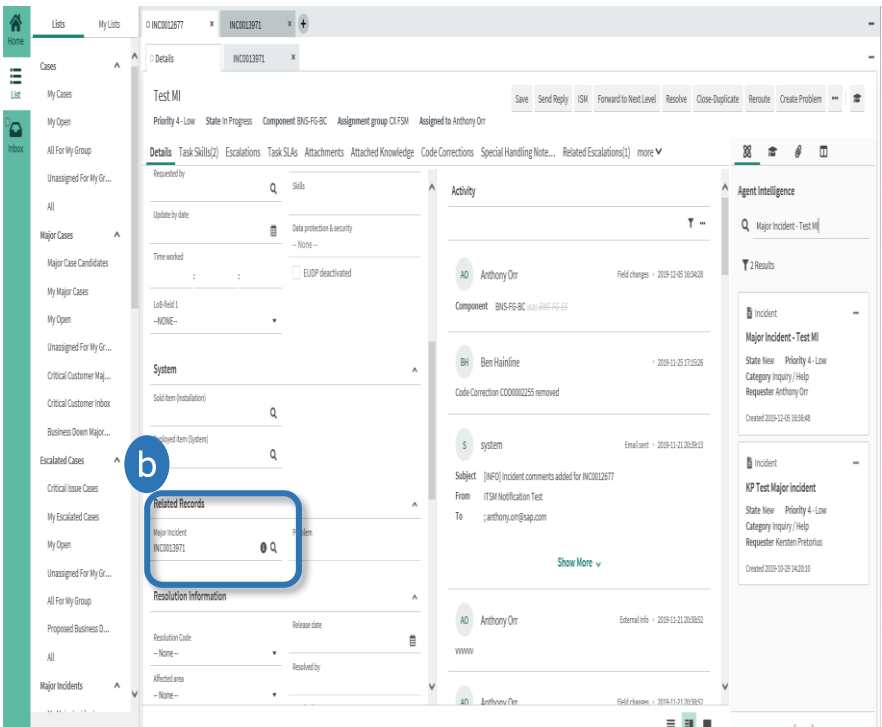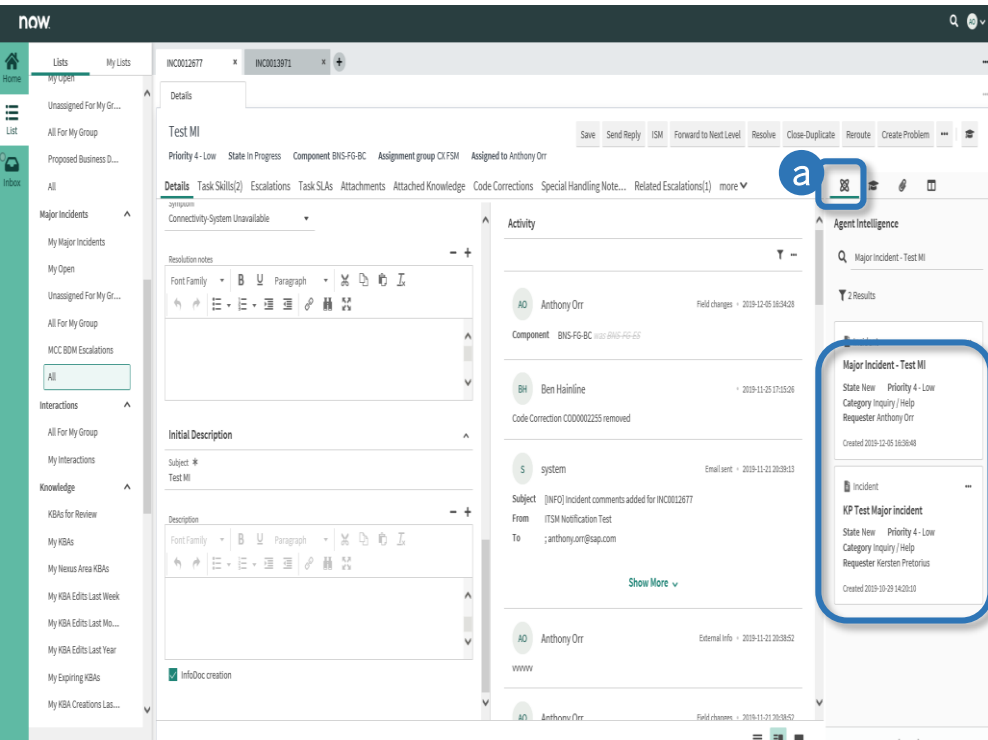
5. Pause and Resume Investigation (if necessary)

Incident Management

Pause and Resume

5a Pause Investigation

Select Message type (External Info)

Fill in Message to be sent (Reason for pausing investigation)

Click Send Reply

State changes from "In Progress" to "Awaiting Info" and Action status to "Awaiting Requestor"

Requester will enter the answer in the incident as an external info

State changes back to "In Progress"

5b Resume Investigation

Click Retrieve

State changes back to "In Progress"

> **Notes** ⚠️
>
> **Pause investigation**
> This is done when the incident processor needs information from the requester
>
> **Resume investigation**
> This is done when you have sent the Incident to "awaiting info " "awaiting requester" and for some reason you need to retrieve, to add more info, etc., you can do it via the "Retrieve" button

Change Log
Secondary title if needed
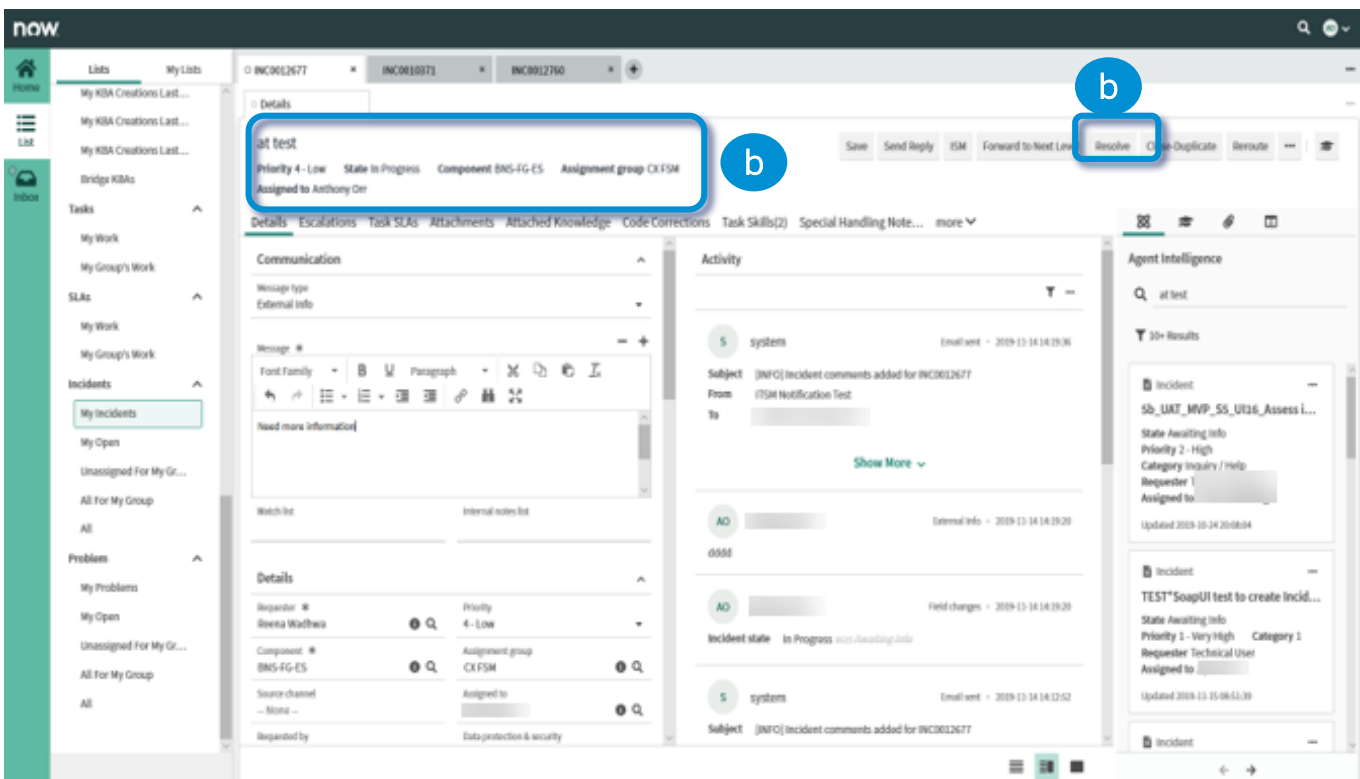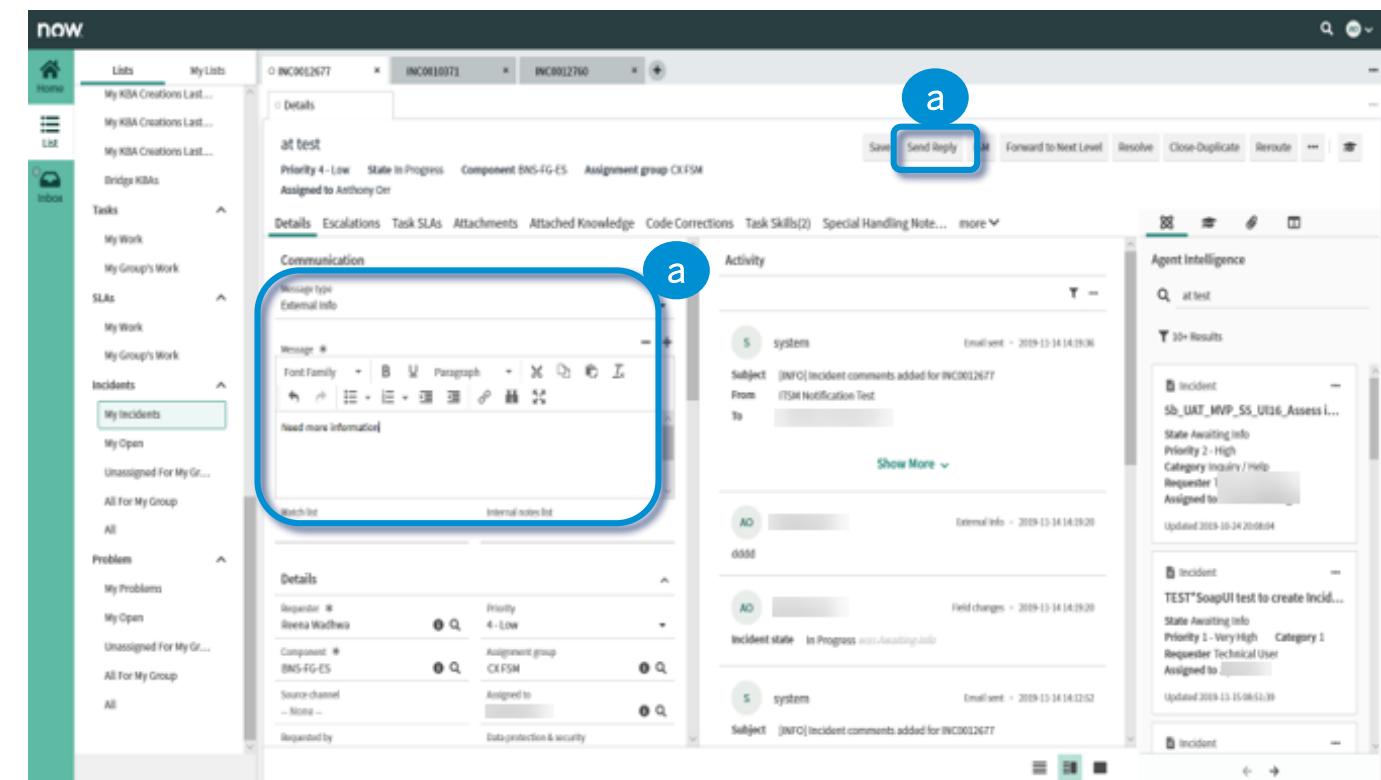
What is a change log?

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 Incident 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 13, 2019	▪ WIPS 4.0 initial document	Draft
2.0.0	Anthony Orr	Oct 01, 2016	▪ WIPS 4.0 Golden Standard Baseline Document	Released