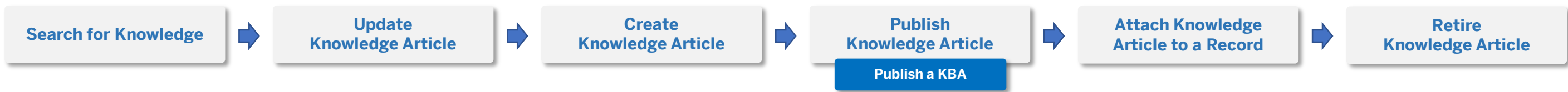


# Publish a KBA

At a Glance



## Knowledge Management Process



### Purpose

KBAs are reviewed, approved, and published to ensure its compliance with the content standards and to be displayed in the Knowledge Bases for future search.

Only Published KBAs with the Release Status of Published and Target of Released to Customer can be attached to provide solution to the customers.

### Who can publish KBAs?

- KM 2: publish their own **Released Internally** KBAs
- KM 3: publish their own **Released Internally** KBAs AND own **Released to Customer** KBAs
- KM 2 Coach: review and publish **Released Internally** KBAs created by both themselves and others
- KM 3 Coach: review and publish **Released Internally** KBAs AND **Released to Customer** KBAs created by both themselves and others

### 1. Finalize KBA Updates

After creating or updating KBA, review and make any final adjustment as needed.

Things to check for final adjustments:

- Have the content standards been followed (if any)?
- All mandatory fields completed?
- Category, product, and component correct?
- Keywords populated?
- All steps for resolution included?
- Grammar & spelling correct
- Any other LoB specific requirement

### 2. Request for Approval

**2a** Request for approval

**2b** Recall KBA to Draft status (if necessary, only available in UI16)

### 3. Review KBAs (only applicable for KM Coach)

KM Coaches review KBAs assigned to them by their coachees that require approval for publishing.

#### Important Note:

- This step is applicable for both newly created KBAs and published KBAs that have been updated by KM 1s and KM 2s prior to being re-published
- KM Coaches must ensure all coachees adhere to the [KBA Content Standards Guide](#) (or other LoB Specific criteria & standards)

### 4. Publish KBAs (only available in UI16)

**4a** Open the KBA submitted for review

**4b** Approve or reject the publishing request

#### Scenario 1: KBA is approved for publishing

Processor (KM 2, KM 3, or KM Coach) review the KBA content and approves the publishing request

#### Scenario 2: KBA is rejected due to need of improvement

KM Coach provides reasons of rejection and rejects the approval request

For more information on retiring KBA, follow [WIPS entry: Retire a KBA](#) if you have the correct role and permission as a KM Coach.

# 2. Request for Approval

## Knowledge Management

### 2a Request for approval

KM 1s and KM 2s require approval to publish external KBAs (i.e. Target = Released to Customer).  
KM 1s also require approval to publish internal KBAs (i.e. Target = Released Internally), while KM 2s can publish their own internal KBAs.

### Which platform to use?

Requesting for publishing approval can be performed in both Agent Workspace and UI16.

### Prerequisite

Make sure that the [KBA Content Standards](#) are followed and that there are no potential data protection or security violations.

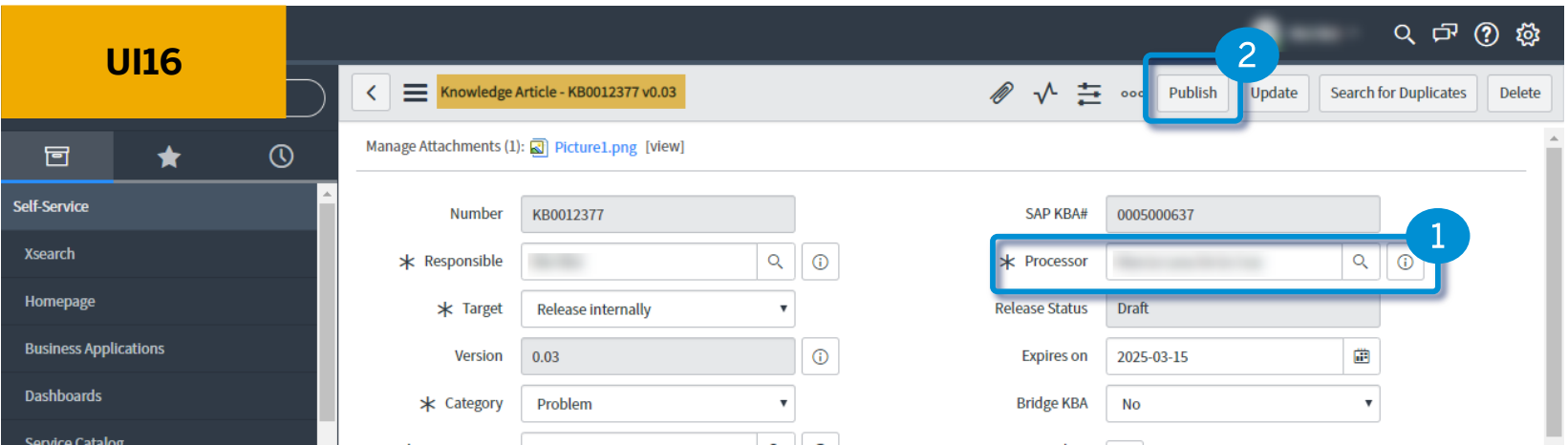
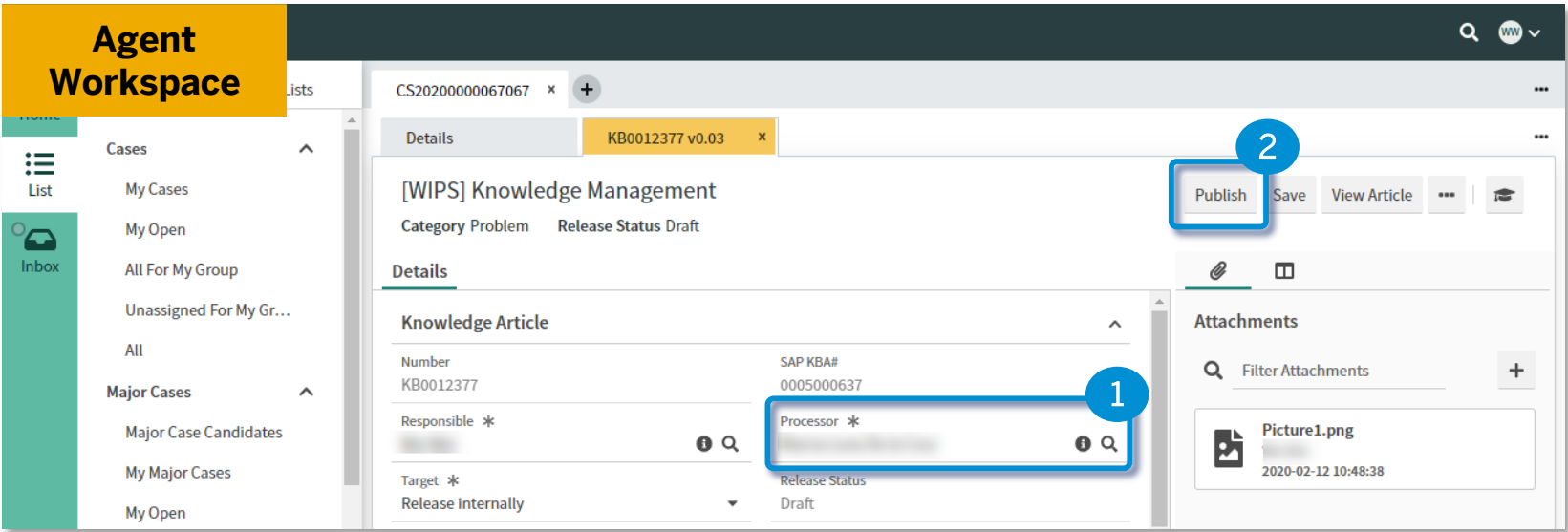
### Step 1

Assign your KM Coach to the **Processor** field.

### Step 2

Click **Publish** in top right corner of the KBA to send the KEB for review and approval.

This changes the KBA Release Status to **Review** and the KBA now is ready to be approved to be published by the KM Coach.



### Best Practices



#### Data Protection and Security

- General Data Protection Regulation (GDPR) is the regulation that enforces the Data Protection and Security law.
- Screenshots** from customer systems are NOT allowed in any Knowledge Management documentation.
- These regulations apply to all KBAs regardless of the KBA status.
- Do not display or disclose personally identifiable information (PII) or any other confidential information or information about our internal SAP servers in any part of the KBA (including screenshots, attachments, videos).
- Refer to the [Data Protection and Privacy \(DPP\)](#) page for further descriptions and guidelines on what [personal data](#) is.

Click [here](#) for more details and for steps on how to report a violation.

# 2. Request for Approval

## Knowledge Management

### 2b Recall KBA to Draft status (if necessary, only available in UI16)

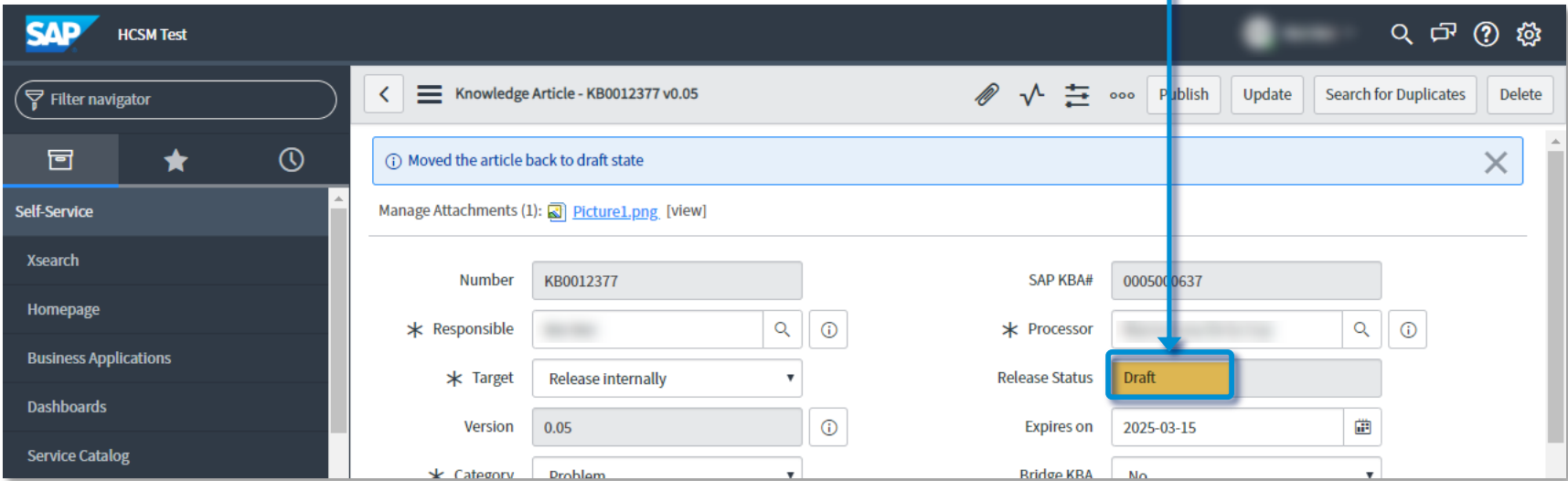
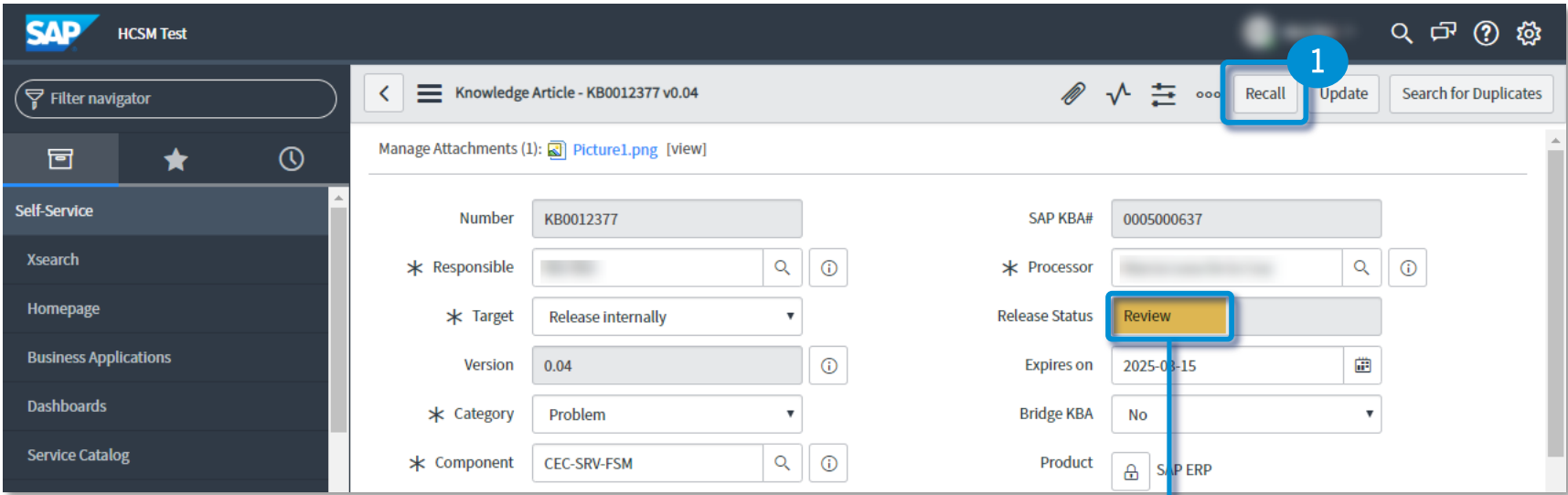
You can recall a KBA you've submitted for approval if you need to make more changes.  
The KBAs (in Review status) can be recalled only in UI16 and it withdraws the KBA from the KM Coach's approval list.

#### Step1

In the editing mode of the KBA in UI16, click **Recall** to recall the KBA for approval.  
This changes the KBA release status from Review to **Draft**.

#### Step2

Make changes as needed and send back to the KM Coach for approval following the steps [here](#).



# 4. Publish KBAs

## Knowledge Management

### 4a Open the KBA submitted for review

All KBAs that are in the Review status can be found in the Knowledge Module under KBAs for Review section. Processors who are responsible to review and approve/reject the KBAs should ensure that all content adheres to the [KBA Content Standards Guide](#) and [Data Protection guidelines](#) before publishing the articles.

#### Step 1

Go to UI 16 <https://itsm.services.sap/> and open the **Knowledge Module** in the **Application Navigator**.

#### Step 2

Click **KBAs for Review** to see the list of all knowledge articles (both KBAs and KEAs) that require review before publishing.

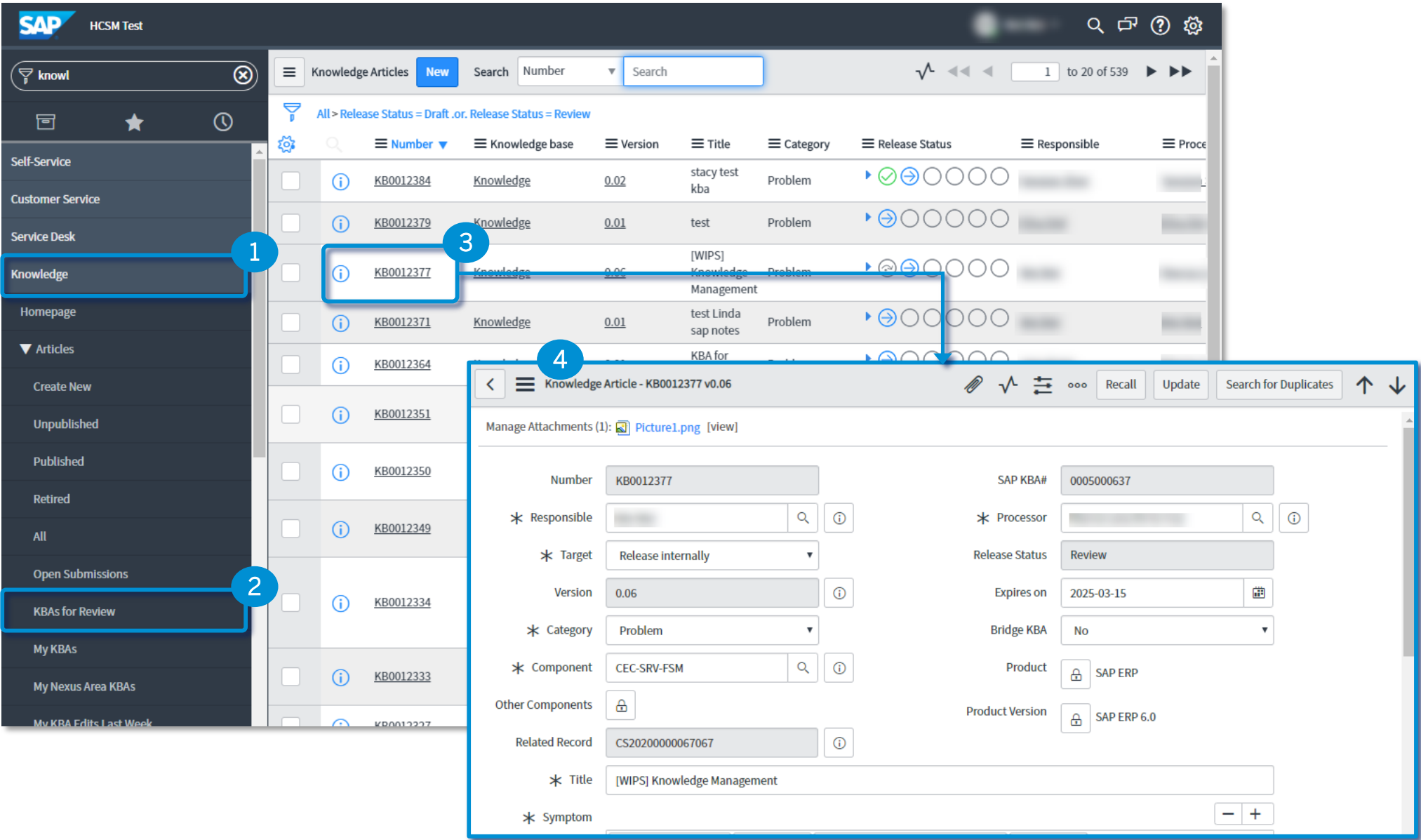
All KBAs are identifiable as **Knowledge** in the **Knowledge Base** column.

#### Step 3

Click the **hyperlinked title** of the KBA you'd like to review.

#### Step 4

The KBA is opened in the editing mode.



# 4. Publish KBAs

## Knowledge Management

### 4b Approve or reject the publishing request

#### Scenario 1: KBA is approved for publishing

When an article is in the Review status, only users who are included in the Approvals related list can modify the article. KM 3s can publish their own internal and external KBAs. KM 2s can publish only their own internal KBAs. KM 2/3 Coaches should review KBAs assigned to them by their coachees that require approval for the publishing of the KBAs. Please ensure that all content adheres to the [KBA Content Standards Guide](#) and [Data Protection guidelines](#) before publishing the articles.

#### Step 1

Scroll down below to the **Related Links** section and go to **Approvals** tab.

#### Step 2

In the **Approver** column, enter the search criteria using wildcard character of asterisk (e.g. **\*YourName**) and press Enter on keyboard to return all results that contain your name.

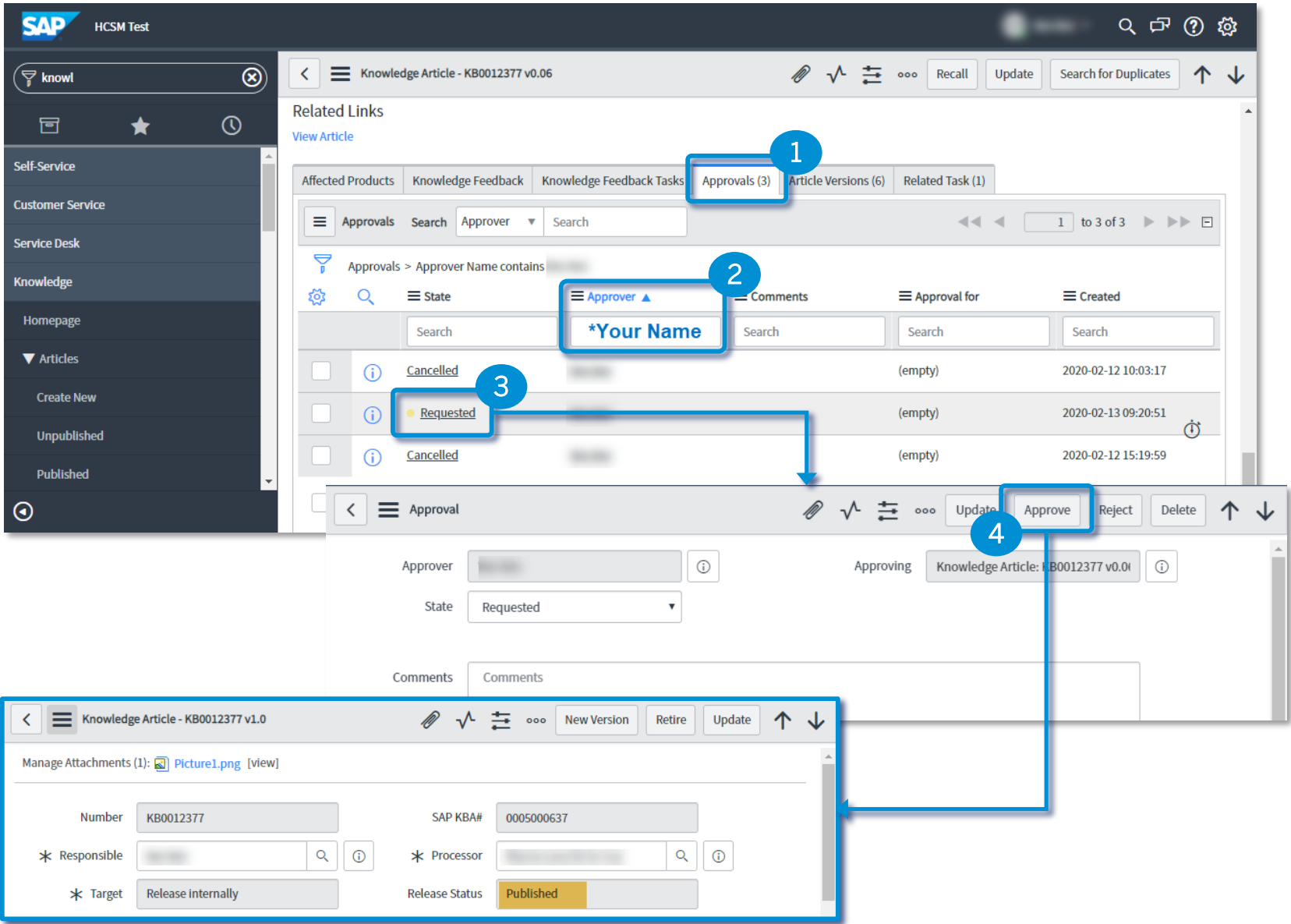
#### Step 3

Click the hyperlinked **Requested** field in the **State** column to open the approval request. If applicable, you can leave any note in the **Comments** field.

#### Step 4

Review the KBA content displayed in the Approval form and click **Approve** to publish the KBA.

This opens the approved KBA and the Release Status has changed to **Published**.



#### Best Practices

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Click [here](#) for more details and for steps on how to report a violation.

# 4. Publish KBAs

## Knowledge Management

4b Approve or reject the publishing request

### Scenario 2: KBA is rejected due to need of improvement

If the submitted KBA requires improvement, the KM Coach should provide reasons of rejection and reject the publishing request.

#### Step 1

Scroll down below to the **Related Links** section and go to **Approvals** tab.

#### Step 2

In the **Approver** column, enter the search criteria using wildcard character of asterisk (e.g. **\*YourName**) and press Enter on keyboard to return all results that contain your name.

#### Step 3

Click the hyperlinked **Requested** field in the **State** column to open the approval request.

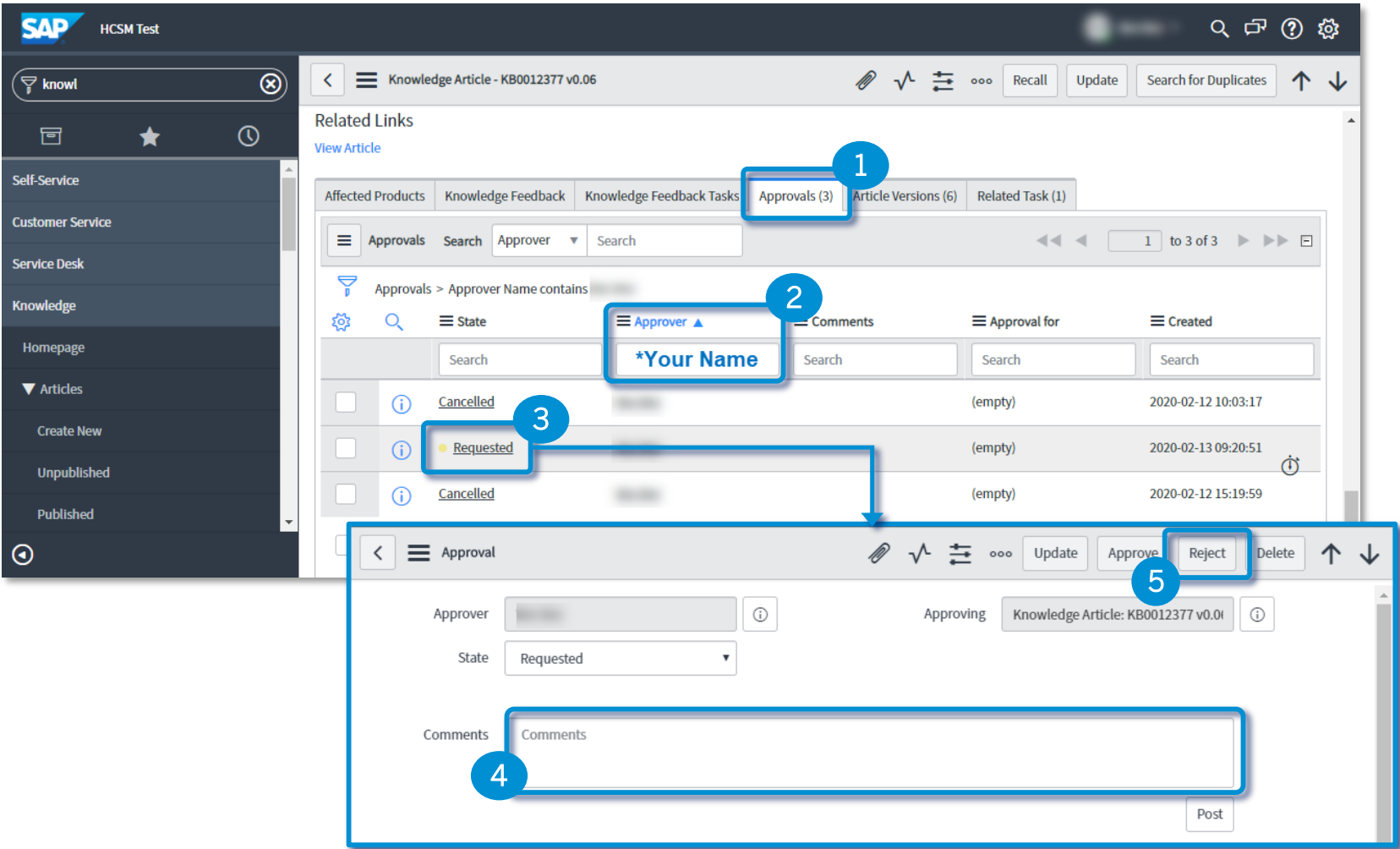
#### Step 4

Provide comments and/or reasons (**mandatory**) for the rejection using the **Comments** field to inform the requestor why the KBA is not approved for publishing.

#### Step 5

Click **Reject** to reject the publishing request of the KBA.

The KBA's **Release Status** remains as **Draft** after rejection.



#### Best Practices

##### Data Protection and Security

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**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

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**Marcia Luna de la Cruz**, [Walldorf](#)  
Process manager

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## Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Carly Thomas	Nov 25, 2019	<ul style="list-style-type: none"><li>WIPS 4.0 Golden Standard Baseline Documents</li></ul>	Published
1.0.1	Wei Wei	Mar 02, 2020	<ul style="list-style-type: none"><li>Updated to new KBA form</li><li>Change of main structure on At a Glance page for more logical flow</li></ul>	Published