

# Personal Knowledgebase for Outlook

## *Installation and Configuration*

This guide will take to step by step on installing and configuring Personal Knowledgebase in your Microsoft Outlook.

Page | 1

For 'Per User Installation' (*ideal for standalone single user/workstation*)

PersonalKnowledgebaseSetup\_x86.zip (for 32-bit Outlook 2010, 2013, 2016, 2019)

PersonalKnowledgebaseSetup\_x64.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

Extract these file contents to a file folder.

### **Requirements:**

- *.NET framework 4.6 or above*
- *Outlook 2010, 2013, 2016, 2019 (both 32-bit and 64-bit versions are supported).*

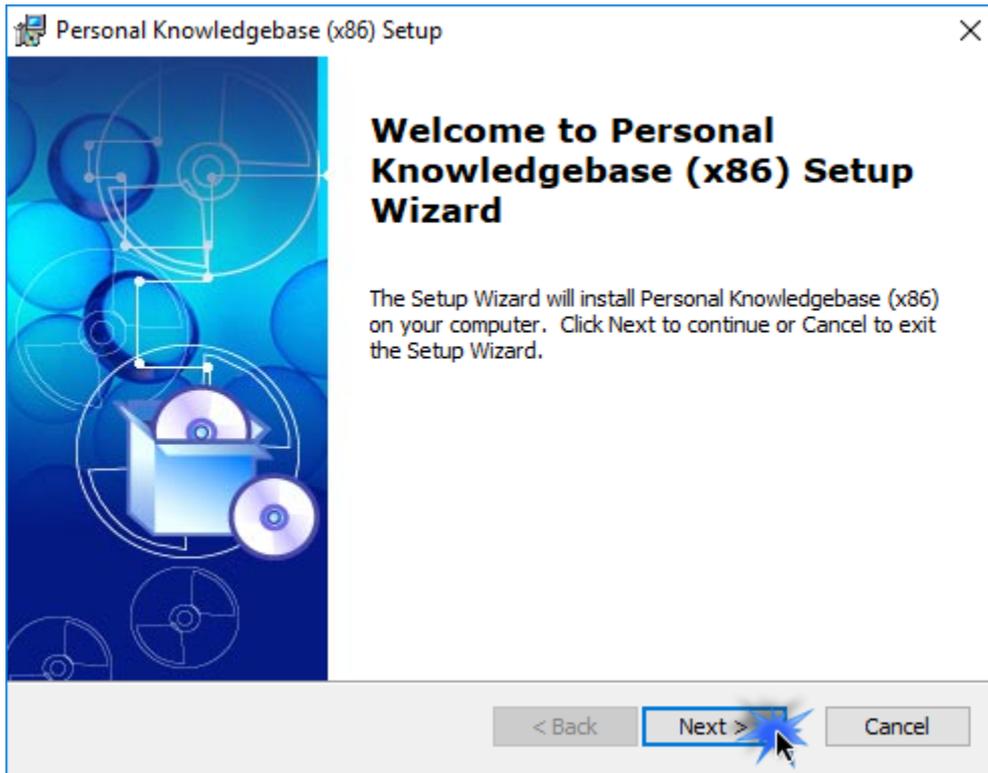
There are two (2) sections:

- I) Files Installation, II) Choose KB Folders

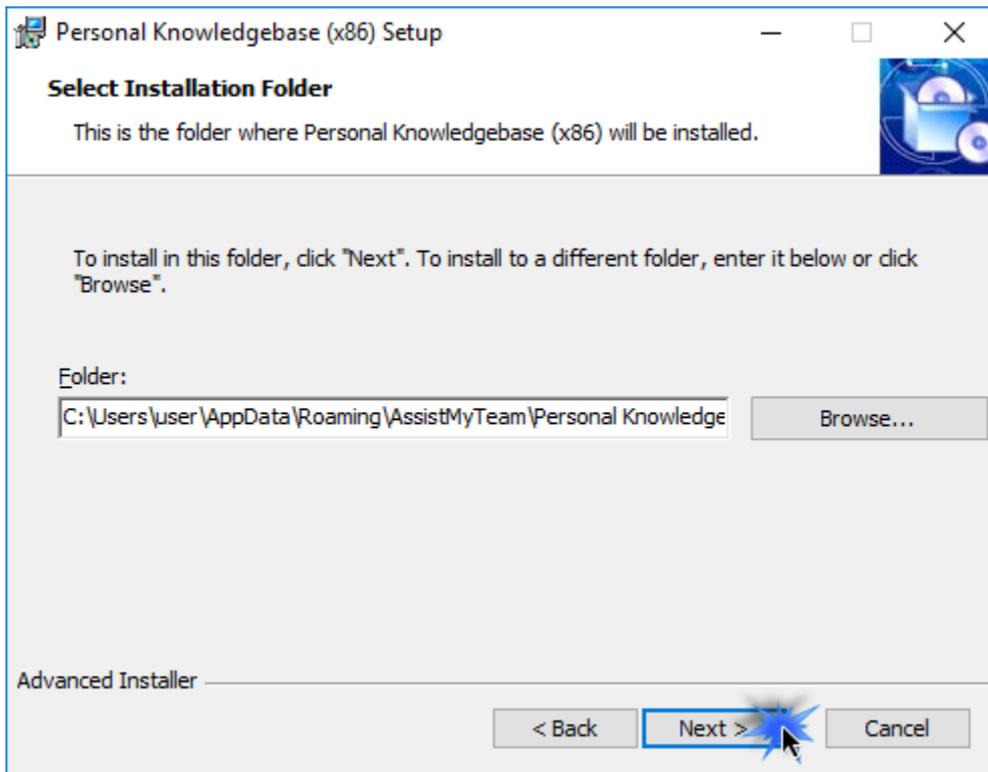
### I) Files Installation

Page | 2

**Step 1.** Run the *PersonalKBSetup\_xXX.exe* to start the installation. Click 'Next' to Continue. If Outlook 2010 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.

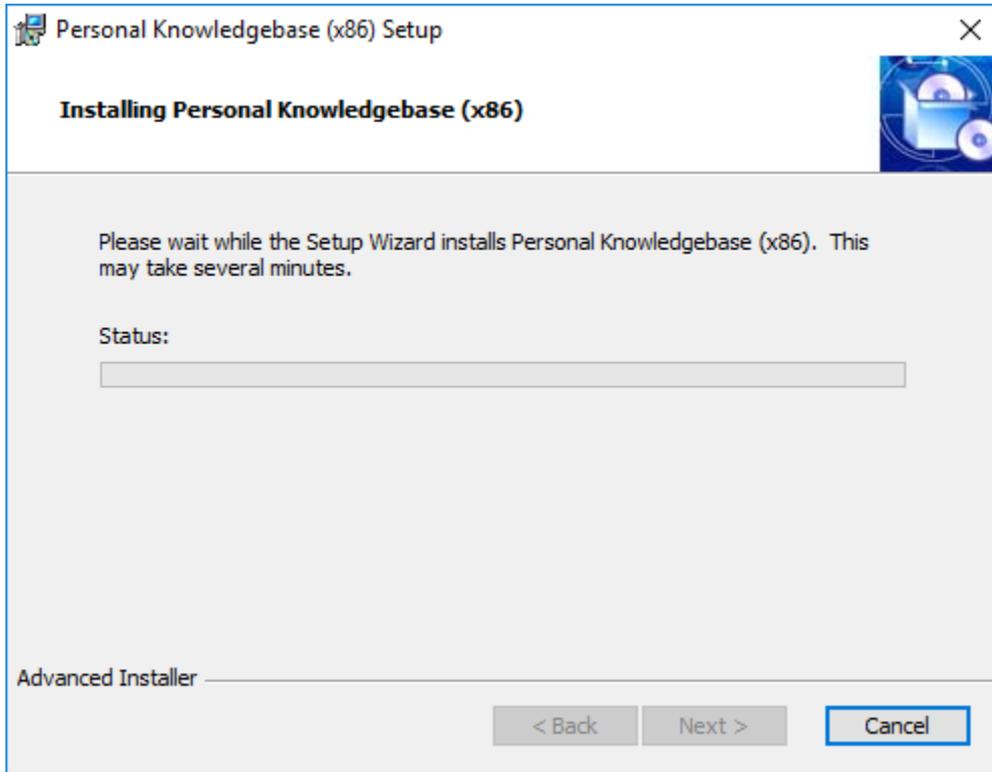


**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.

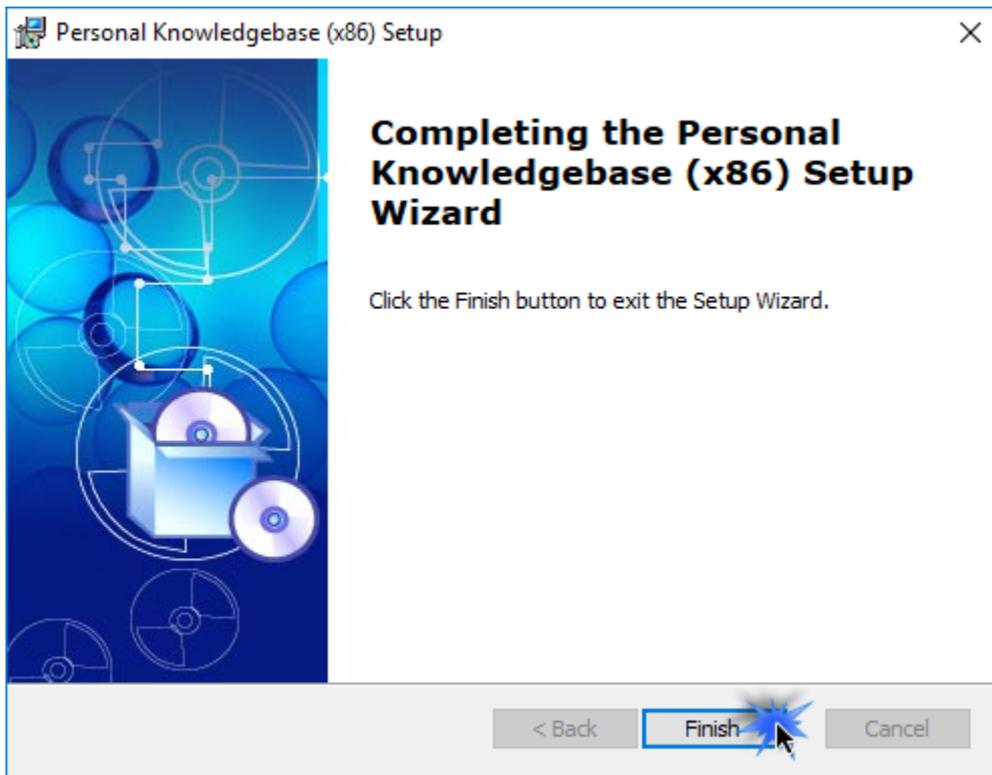


**Step 3.** It just takes a few minutes to complete the whole copying process

Page | 3



**Step 4.** Click 'Finish'. This ends the files installation process in your system.



Now start Microsoft Outlook. If the Personal KB add-in installation was successful, you will see a toolbar or ribbon with the title '*Personal Knowledgebase*' toolbar in Outlook.

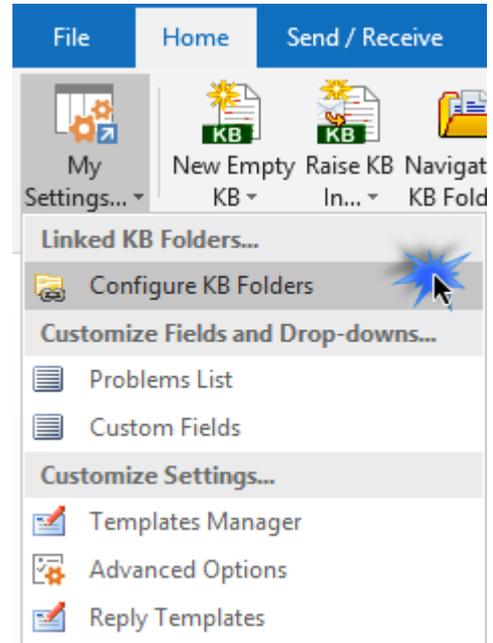
## II) Choose KB Folders

Before you can start generating KB articles or using them in Outlook, you to choose the destination KB Folders that store the KB articles and link them up with Personal KB Add-in.

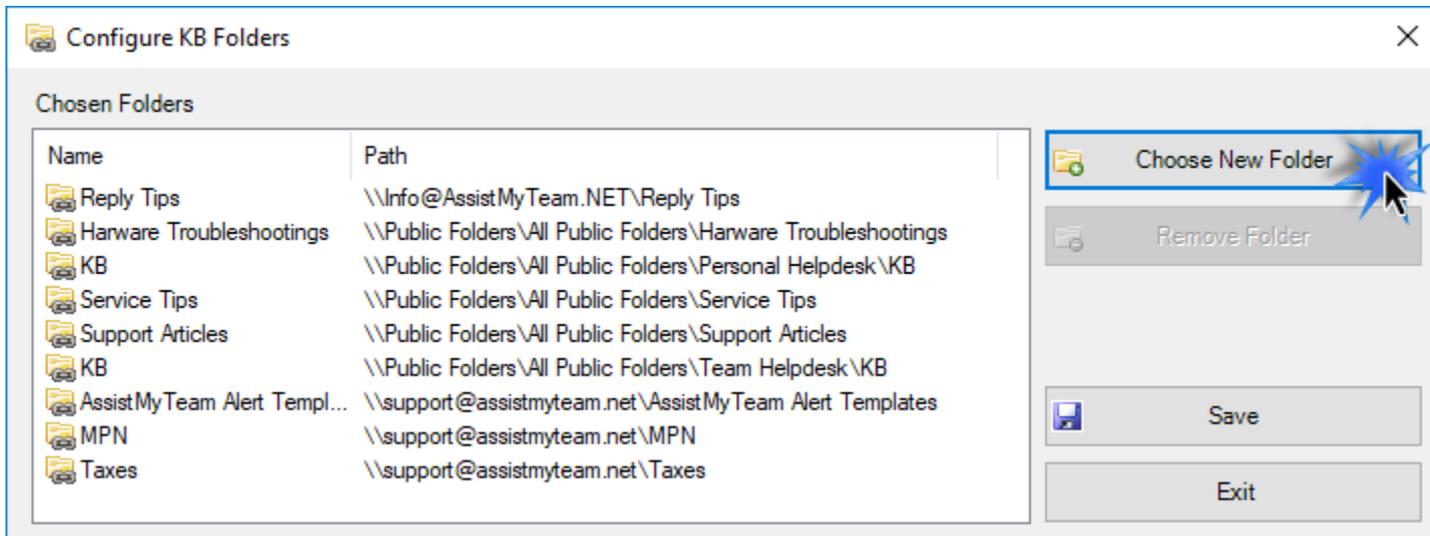
Page | 4

Once linked, you would be able to use KB articles from these folders in Outlook to reply to emails, as well as generate new KB articles in one of these linked KB folders using information and content from emails in Outlook.

To choose and configure a new KB folder, go to My **Settings menu** > **'Chosen KB Folders'**.



Here is a listing of all KB folders containing KB articles that are linked and chosen.

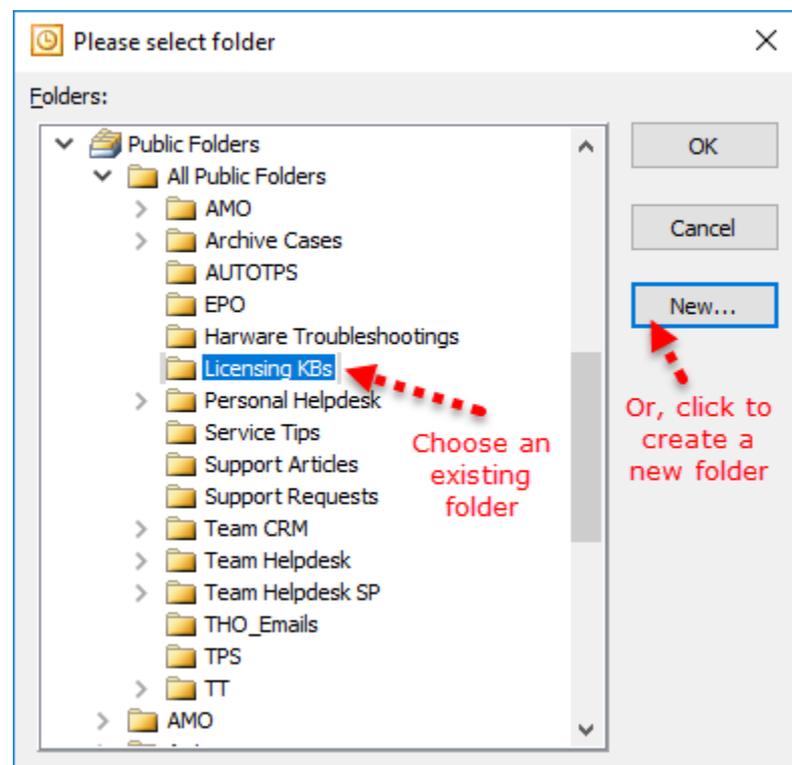


To choose and configure a new KB folder, click **'New Folder...'** button.

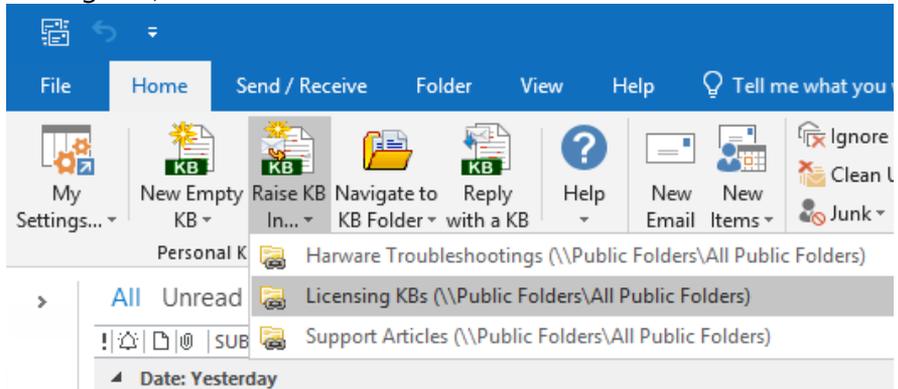
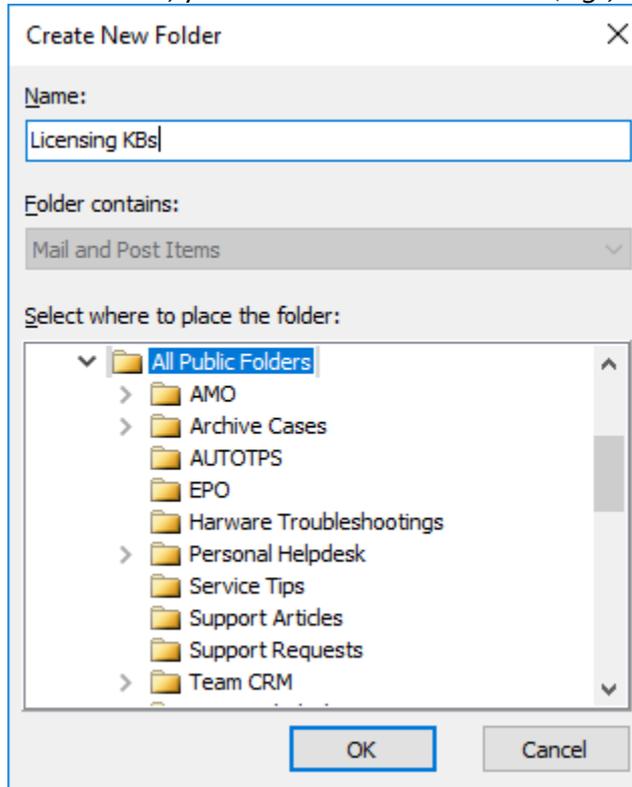
You will then be prompted to choose an existing folder or create a new one.

For others to have access to these KB folders, make sure you choose or create new folders that are accessible by all your staff members from their Outlook. i.e., the KB folder should either from a shared Exchange mailbox or an Exchange Public Folder.

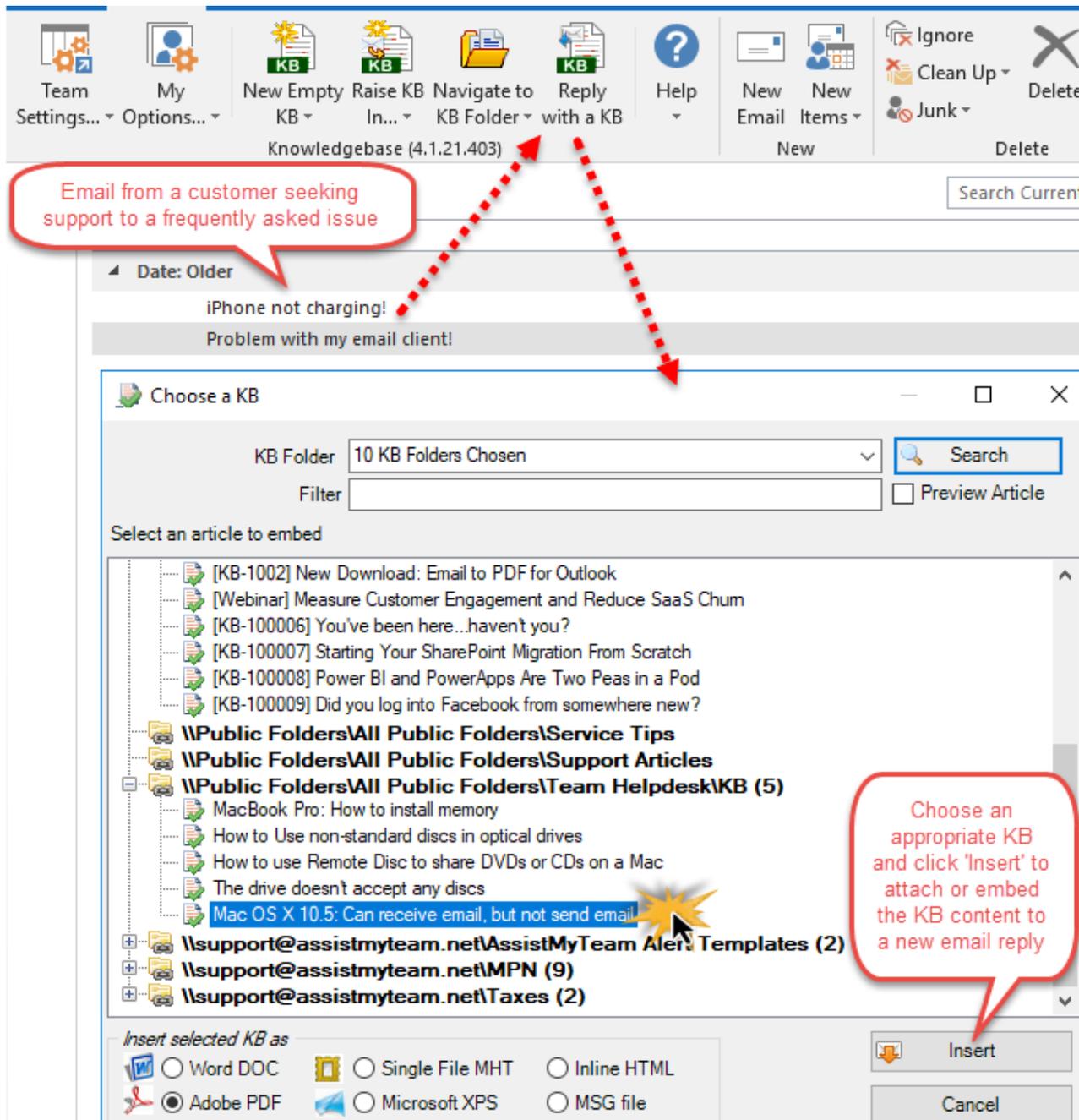
You can re-use existing KB Folders or create new ones for this purpose.



For instance, you can create a new folder (e.g., Licensing KBs):



If you have added multiple KB folders in Personal KB add-in, you will notice that the 'Raise KB in' drop down menu shows all of them. You can then simply choose the destination KB folder to which a new KB will be raised from the selected email in Outlook.



**NOTE:** *There are other administrative configurations that you would need to undertake. These options are available in the 'My Settings...' drop down menu of the Personal KB toolbar or ribbon in Outlook.*

*For more references and helps on performing these administrative configurations, refer to the PDF Help Manual, which can be invoke from **the Personal KB toolbar or ribbon > Help > Help Topics.***

*You can also download the full PDF help manual directly from [this link](#).*