Personal Knowledgebase for Outlook

Help Manual

Welcome

Use KB articles stored on your Outlook folders to reply to support emails in Outlook seamlessly

This is an elaborate help documentation that will guide you how to use Personal Knowledgebase for Outlook. For a quick overview, refer to our video demonstration available on the product website.

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1. Why do you need a knowledgebase?

You frequently find yourself solving the same issue over and over. Your end-users send you emails on similar issues repeatedly. You wish you could share your knowledge with team members so that everyone has the same understanding and are communicating the same message when asked about specific issues! Yes, a knowledge management system is what you need, where all the best practices of your businesses, operations and assets are documented, and are accessible at the enterprise level to all members of your team.

Other factors that demand for a knowledge management system:

- ✔ Rising rate of innovation and increasing competition in marketplaces
- ✔ To replace informal knowledge with format methods, especially, when the organization is under-staffed
- ✔ Competitive pressures reduce the size of workers that holds valuable business knowledge.
- ✔ To help new workers to experience and acquire knowledge in the shortest time.
- ✔ Early retirements and increasing mobility of the work force lead to loss of knowledge.
- ✔ Need to manage increasing complexity as business operations become globalized.
- ✔ Changes in strategic direction may result in the loss of knowledge in a specific area.
- ✔ Retaining knowledge when employees leave or change positions

As most of our work is information based, it is imperative that organizations maintain a structured library of information and solutions, such that, the knowledge system provides access to right information, at the right time, to the right workers in need. In brief, knowledge and information have become the medium in which business problems occur. As a result, managing knowledge represents the primary opportunity for achieving substantial savings, significant improvements in human performance, and competitive advantage.

2. Introduction

Personal Knowledgebase exists as an Outlook add-on, allowing you to share information, reduce customer support, improve staff productivity and eliminate time wasted searching for information across disparate systems such as shared folders and paper documents, all inside Outlook.
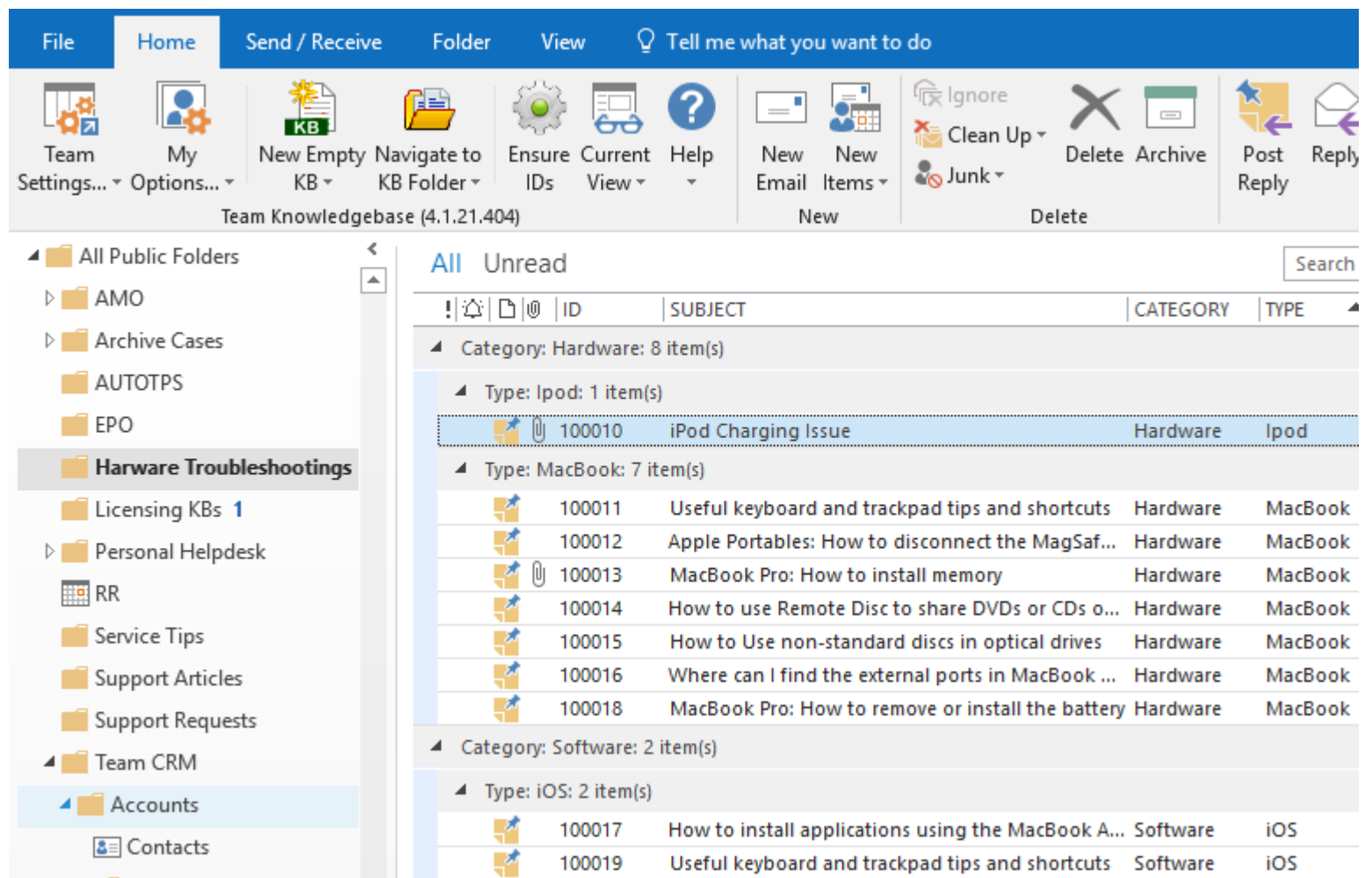
As you use Microsoft Outlook, every day, all the time, to attend to emails from end-users, wouldn't it be better if you make your Outlook smarter, which do more than just acting as a simple email-client.

Personal Knowledgebase add-in extends your Outlook to provide better interaction between you and your knowledge base, transforming it into an information-based, interaction-driven and easy to use collaboration tool. With such functionalities in Outlook, you can document best practices and solutions to common problems and reply to time-consuming and repeated queries from your users in a click, thereby, reducing service response time, enabling effective collaboration and overall productivity for your team.

Purpose of this add-in

Your end-users send you emails on similar issues repeatedly. And if you are already aware of the solution, typically, you will try to compose the solution or if you have vague recollection of it, you would try to navigate to your existing document libraries, past emails etc. Just consider how much time and effort you had wasted in trying to find the right information at the moment of need, not to mention the delayed response to the support request. You wish you could share your knowledge on a centralized information system with other team members so that everyone has the same understanding and are communicating the same message when asked about specific issues.

Many IT managers resort to using existing emails in Inboxes and other Exchange folders to document best practices and solutions to common problems, in the form of KB articles, because of the easy accessibility and collaborative capability. So, when a support request email is received in Outlook, support staffs would generally go to these folders and browse or search through the tier of KB articles. If a relevant article is found, either the staff would rewrite the solution from scratch into the email, or copy the contents from article item to the email reply, in a crude fashion. Moreover, the frequent switching back and forth between the email and KB folders tends to loosen the focus of the support staff, leaving him/her frustrated.

Evidently, organizations and teams that leverage Exchange folders as a knowledge base would need to reinvent the wheel and implement an efficient way of importing folder-based article or document, to outgoing email reply.

Personal Knowledgebase is designed to bridge this gap between your Outlook and Exchange folders where all your knowledge base articles are stored, such that you can effortlessly locate a KB article relevant to an issue from within Outlook itself and insert it into an outgoing email reply in a single click. All these and more making sure, the outgoing email retains all the actual files and the original formatting of the selected KB article. No more frequent switching between Outlook folders, no more copy-paste job etc.

3. Requirements

Windows Version	**Windows Vista, 7, 8, 8.1, 10. Both 32-bit and 64-bit OS are supported.**
Outlook Version	Microsoft Outlook 2010, 2013, 2016, 2019 (both 32-bit and 64-bit are supported). Earlier versions such as Outlook 2000, XP should work, but they are not actively supported. The application operates directly inside the Microsoft Outlook. Outlook Express is not supported.
Others	Microsoft .NET Framework 4.6

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4. My Settings

The Personal Knowledgebase add-in provides a dedicated menu in the toolbar that allows you to customize the contents of all problem categories/types drop-down boxes, Choose and configure KB Exchange folders where articles are stored, templates for KB notification, custom fields etc.

The Personal KB menu serves as the gateway for launching most of the functionalities and tools available. In Outlook 2016, you would find this menu under in a dedicated button menu '**My Settings**' under the toolbar as shown below.
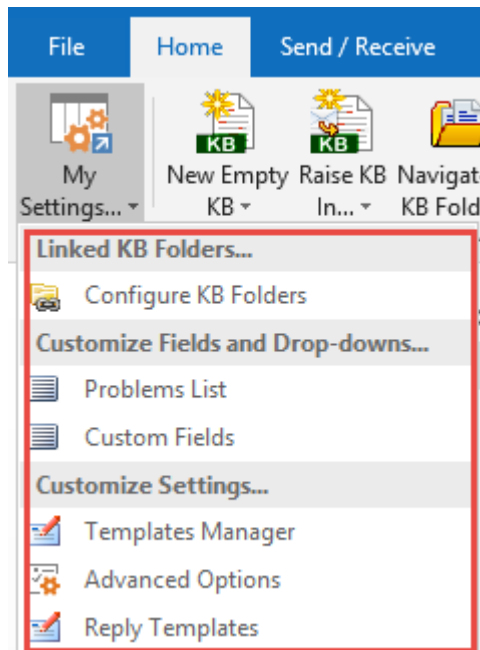
4.1 Choose and configure KB Folders

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

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'**.
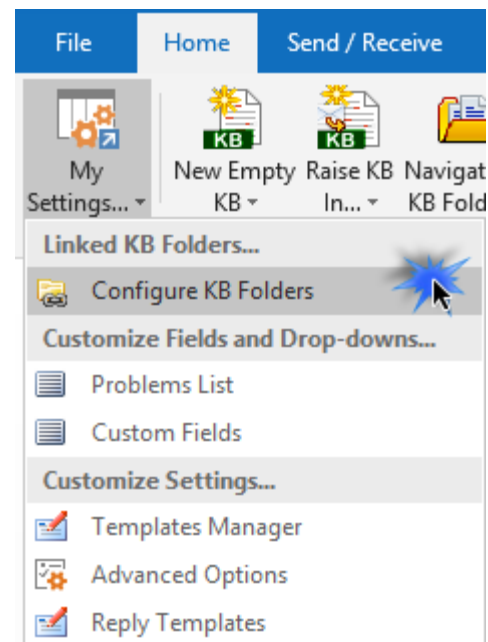
Here is a listing of all KB folders containing KB articles that are linked using the add-in tool.
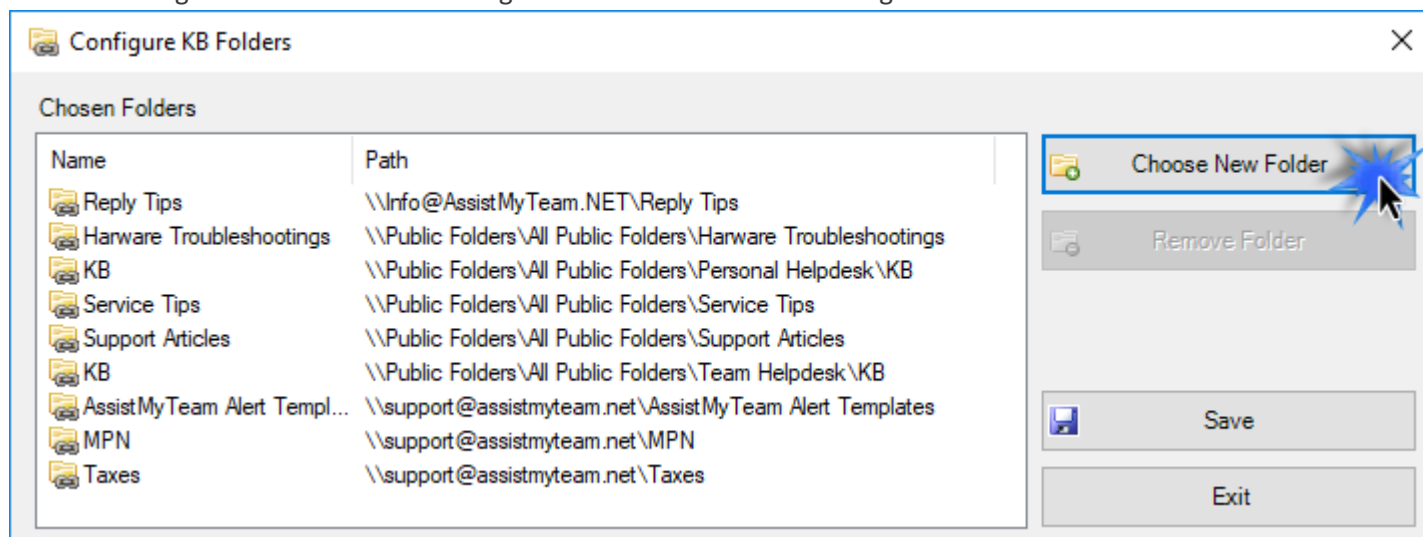
To choose and configure a new KB folder, click **'New Folder…'** button.

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

You can re-use existing KB Folders or create new ones for this purpose.
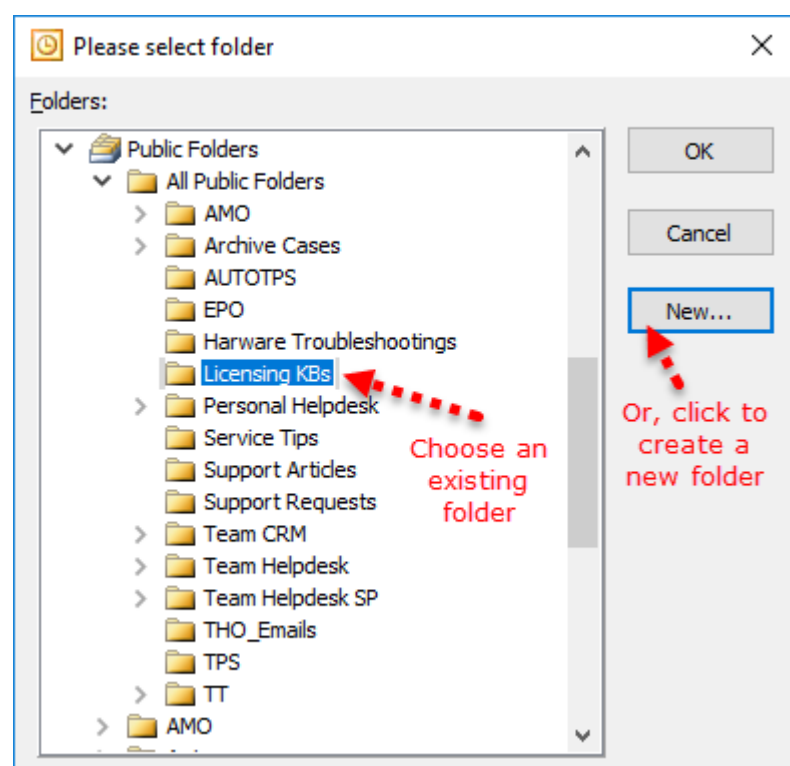
For instance, you can create a new folder (*e.g., Licensing KBs*):
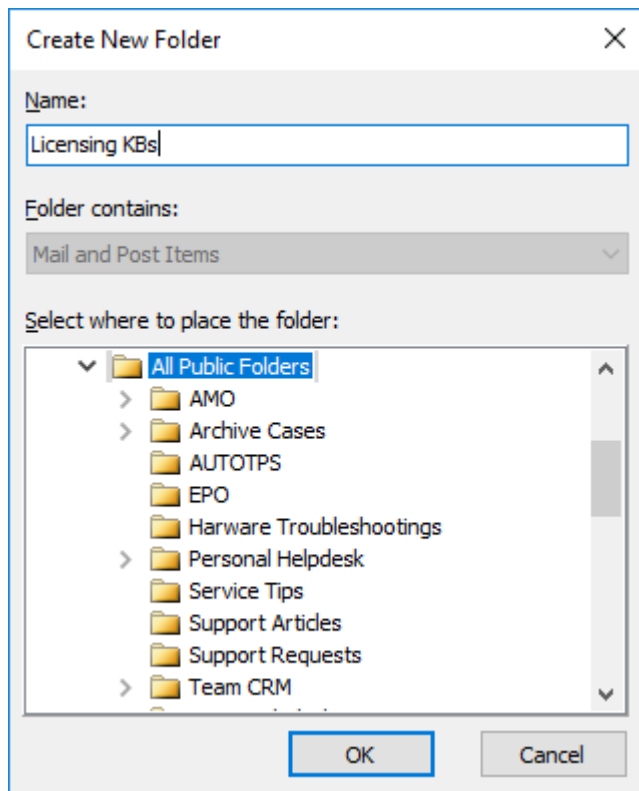
If you have added multiple KB folders in Personal Knowledgebase add-in, you will notice that the **'Raise KB in'** drop down menu shows all of them. You can then simply choose the destination KB folder to which a new KB will be raised from the selected email in Outlook.
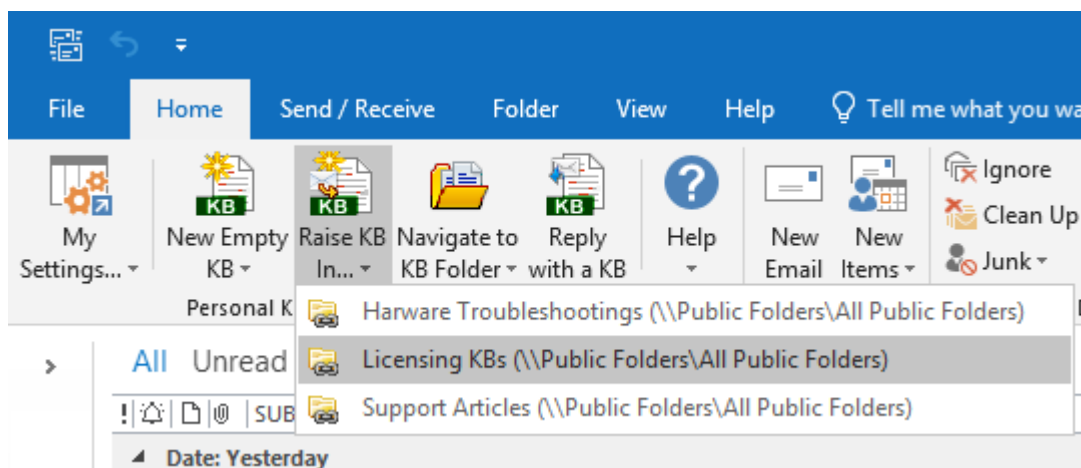
Through the Personal Knowledgebase console, you can choose any number of KB folders for multiple categories, products or departments.

4.2 Problems List

The Problems list panel allows you to add categories and sub-categories (e.g., types) that are representative of all possible incidents reported by your end users.

(1) Gather all the problem areas that your support team will be attending to and feed them into the 'Category' field.

(2) **Problem types list** - The problem types are sub-category items that falls within the domain of a problem area/category. Hence, each problem category has a specific list of problem types that you can choose from when submitting a new KB article.

NOTE: If a particular problem type is applicable to all problem categories, leave the 'Problem category' column as empty. That is, if you have a common problem type for all Problem categories, you don't need to add the same problem type for each category. Just leave the Problem Category column empty for that problem type.

In the knowledge base form, when you select a problem category from the drop-down field, it will load this tier of problem type lists in the type drop-down box, corresponding to the selected category. These nested tiers of categories/types are complete customizable to your organization's support model and act as somewhat of a guiding decision tree for users (internal staffs as well as web users) in finding the right KB article.

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4.3 Custom Fields

You can use Custom fields and Custom list as KB metadata to help describe the KB article more meaningfully. Custom fields can be of 6 different data types as displayed in the image above: *Currency, Date/Time, Numeric, Text, Yes/No, Note.*

You can add any number of Custom fields as required and they will all appear in the KB form in Outlook.

Custom List - The titles of these custom list can be edited to get the proper meaningful label that signifies the information the field store. *For example, the first drop down field can be titled as 'States' and the administrator can fill up the names of all the States.*

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4.4 Reply Templates

When you choose a KB article to insert into an email reply, usually, you would need to compose the initial portion of the reply, informing about this KB article and how it can help resolve the issue the sender was facing.
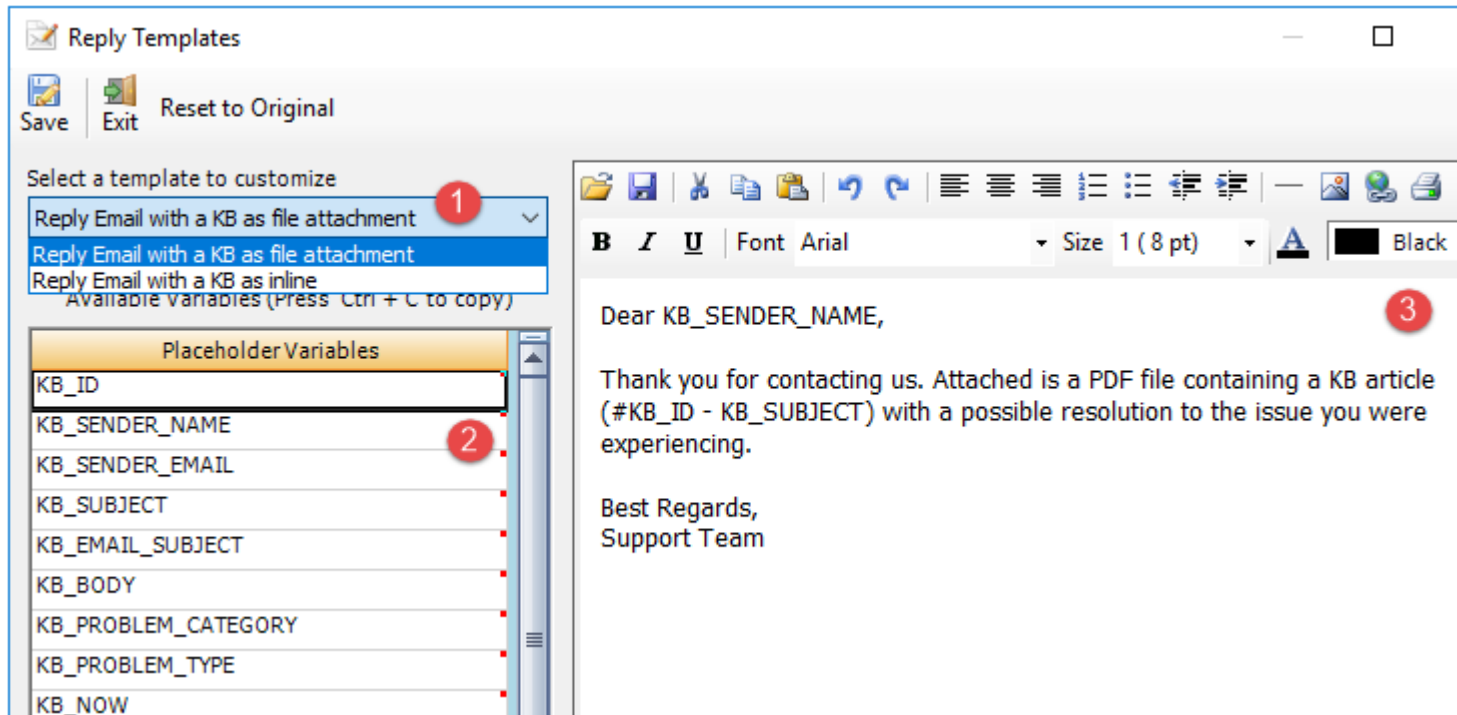
1 There are two templates provided that can be used when replying an email with a chosen KB article. With a template, you need not compose anything, even a single word, to make a personalized reply to the sender with a chosen KB article.

2 reply Templates:

a) **Reply Email with a KB as file attachment** - This template is used when you choose a KB article to be inserted as PDF or MSG, XPS or DOC file.

b) **Reply Email with a KB as inline** - This template is used when you choose a KB article to be inserted as inline content directly into the body of the email reply.

2 List of all **placeholder variables** on the chosen KB article that you can embed into the template. The add-in will substitute the embedded placeholder variables with the actual data on the KB before sending the email.

3 When you make the reply, the reply template is inserted into the outgoing email, substituting all the placeholder variables that you have inserted into the templates such as KB_SENDER_NAME, KB_ID etc.

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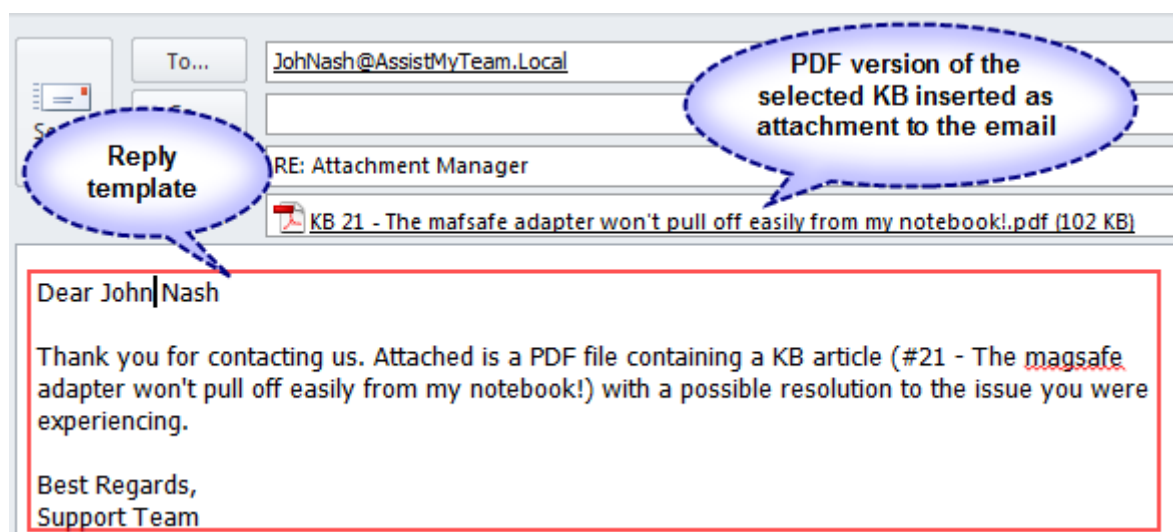
4.5 Notification Template

You can customize the email template that will be used in notifying support staffs and stakeholders when a new KB article is published.
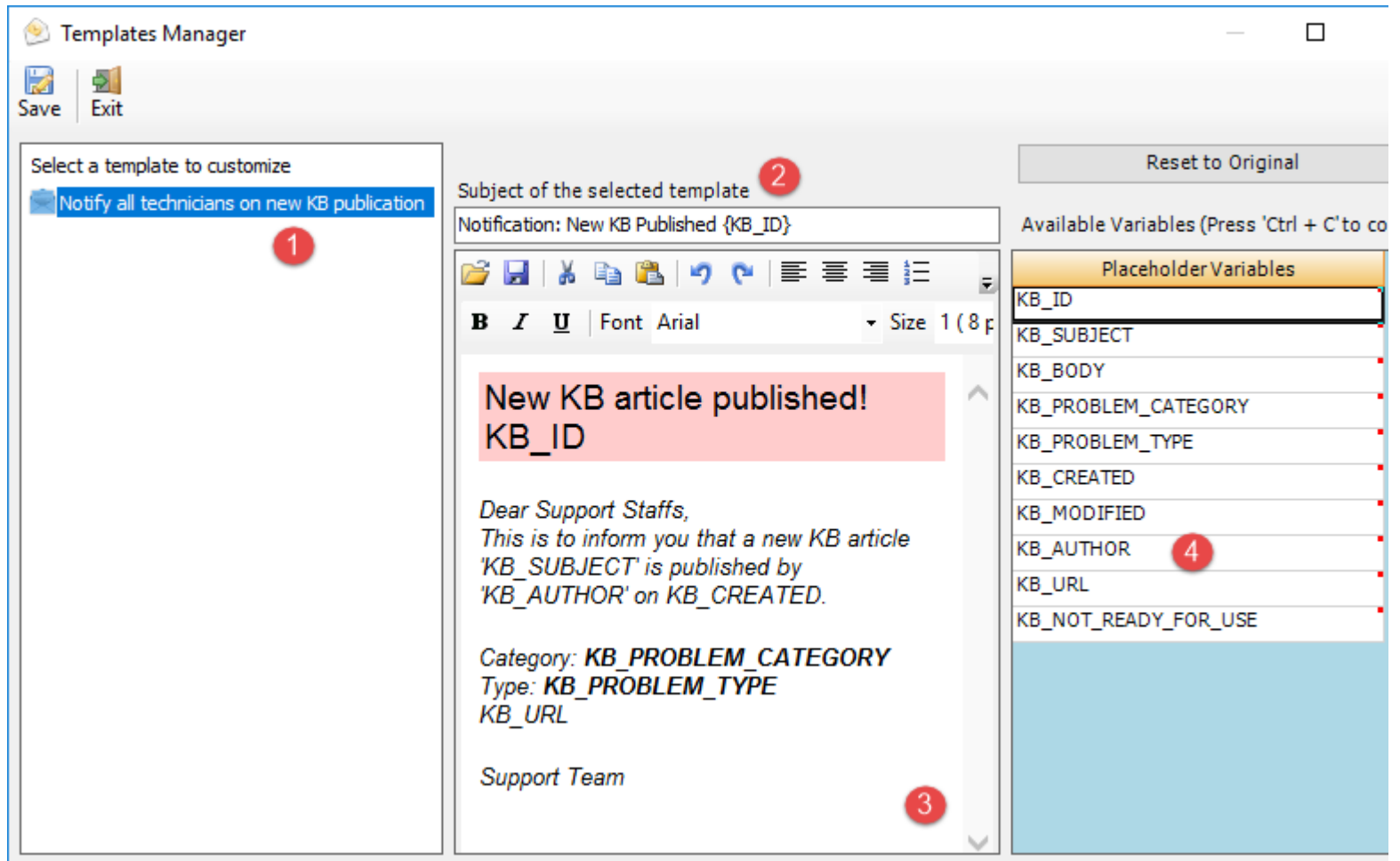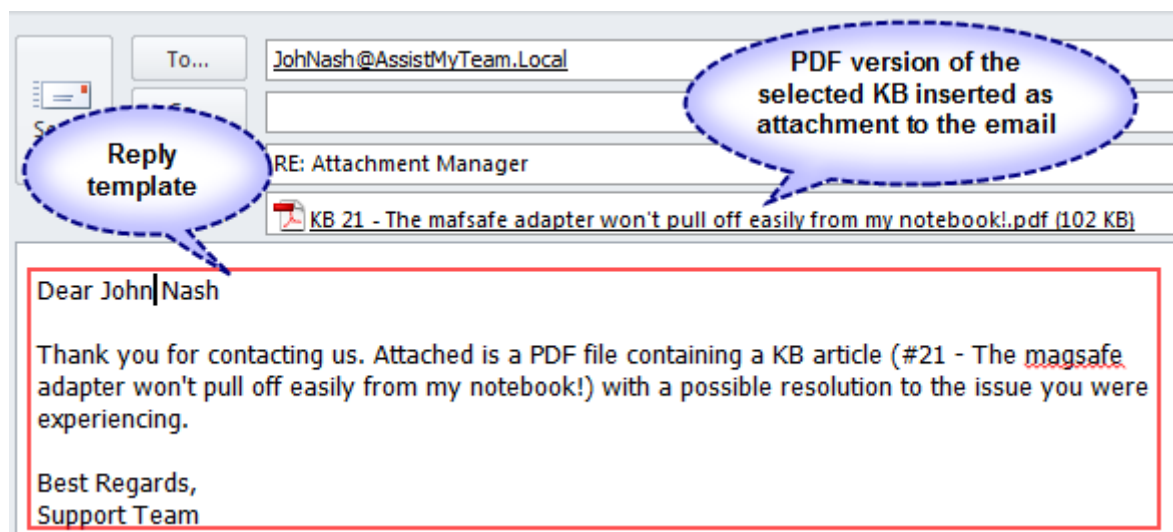

① This is the template name. And the corresponding body is customizable in the WYSIWYG editor.

② **Subject** of the active template. This can be customized and can take placeholder variables.

③ A **WYSIWYG** HTML editor with which you can customize the contents, apply HTML formatting as well as insert the placeholder variables. The look and feel as well as the buttons and functionalities are similar to Microsoft FrontPage authoring tool

④ A list of all **placeholder variables** available for inserting into a particular template. In runtime (that is, when the actual email is generated from the template), the enclosed variables will be substituted by their corresponding values. The followings list all the supported variables:

Variable	Purpose
KB_ID	Unique ID that is automatically generated when a KB article is generated.
KB_SUBJECT	The short description of the Article (Subject)
KB_ BODY	The actual description/solution of the KB article (body field)
KB_PROBLEM_CATEGORY	Problem Category that is tagged to the KB article
KB_PROBLEM_TYPE	Problem Type that is tagged to the KB article
KB_CREATED	Creation time of the KB Article
KB_AUTHOR	The user who created this KB article
KB_NOT_READY_FOR_USE	The state of the KB article – Draft state or Published state.

4.6 Advanced Options

With the advanced options, you can control and streamline how you interact with Personal Knowledgebase Add-in and use KB articles from the chosen KB folders in their Outlook.

My Settings...

General | Article ID | Logo | Notifications | UI

☑ Hide pop-up confirmation message **1**
☑ Use Reply Template when using KB to reply to an email **2**
☑ Show KB Context menu on top **3**
☑ When replying a KB to an email, use 'Reply All' **4**

Default Problem Category of newly generated KB **5**
Default Problem Type of newly generated KB **6**

☑ Allow pre-fill information when generating new KB from an email **7**
When generating KBs from multiple emails, allow prefilling on KB form on upto
1 ⌄ KBs *NOTE: KBs that fall above the specified limit will be raised directly*

1 **Hide pop-up confirmation message** – Enable this option to hide the confirmation message that is displayed in a pop-up dialog whenever a new KB article is generated or edited or an email send.

2 **Use reply Template when using KB to reply to an email** – Enable this option to set the add-in to use a customizable email template when a KB article is chosen for replying to an email. These templates can be accessed and customized from *Outlook > Personal Knowledgebase toolbar > My Settings > Reply Templates*.

To... JohNash@AssistMyTeam.Local

PDF version of the selected KB inserted as attachment to the email

Reply template

RE: Attachment Manager

📄 KB 21 - The mafsafe adapter won't pull off easily from my notebook!.pdf (102 KB)

Dear John Nash

Thank you for contacting us. Attached is a PDF file containing a KB article (#21 - The magsafe adapter won't pull off easily from my notebook!) with a possible resolution to the issue you were experiencing.

Best Regards,
Support Team

NOTE: If this is disabled, the add-in will only insert the chosen KB article as inline content or attachments and you will have to write your own reply.

3 **Show KB Context menu on top** – Enable this option to set your preference for the placement of the KB context menu in topmost or bottom position.

For instance, when this option is enabled, the KB menu items appear at higher position in the context menu (right-click menu)

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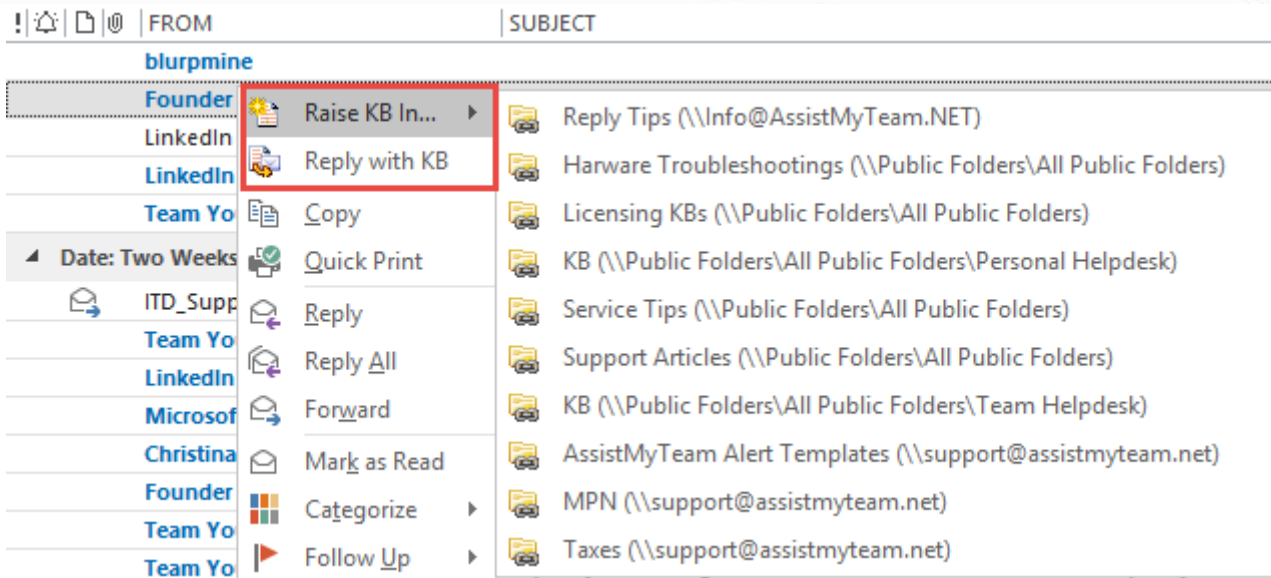
If the option is unchecked, the KB menu items appear at the lowest position in the context menu.
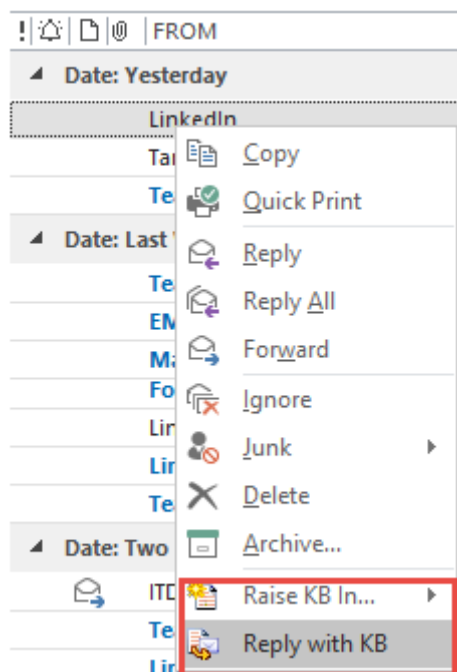
④ When replying to an email, use 'Reply All' – Enable this option to configure the add-in to send the reply with the inserted KB article to all recipients of the original email (similar to the 'Reply All' button in Outlook toolbar)

⑤ Default category for newly generated KB article – Choose a category from the drop-down list that you would want to set as the default category to any newly generated KB article in Outlook.

⑥ Default Type for newly generated KB article – Choose a type from the drop-down list that you would want to set as the default type to any newly generated KB article in Outlook.

⑦ Enable this option to pre-fill information on multiple new KB articles that are generated from emails. Here you can set the number of KB articles that will be displayed in its respective KB form in Outlook before they are generated in the chosen KB folder. For instance, if you set value 3, when you choose 3 emails to generate KB articles, all 3 will be displayed in their respective KB form in Outlook so that you can pre-fill further information to the KB articles before they are generated in chosen folder. However, if you choose 5 emails, it will allow you to pre-fill on the first 3 emails (i.e., 3 KB forms will show up in Outlook), and the rest (2 KB articles) will be directly/instantly generated in the chosen folder.

Change the KB Article ID counter - Alter the current KB Id numbering count to your specified number. Comes handy if you want the KB article numbering to start from a particular number. E.g. 10000 instead of 1 (default).

Place KB Article ID in KB Subject – Enable this option if the Article ID (enclosed in square brackets) is to be placed at the beginning or end of the subject line of the article item. By default, the ID is placed the beginning of the subject.

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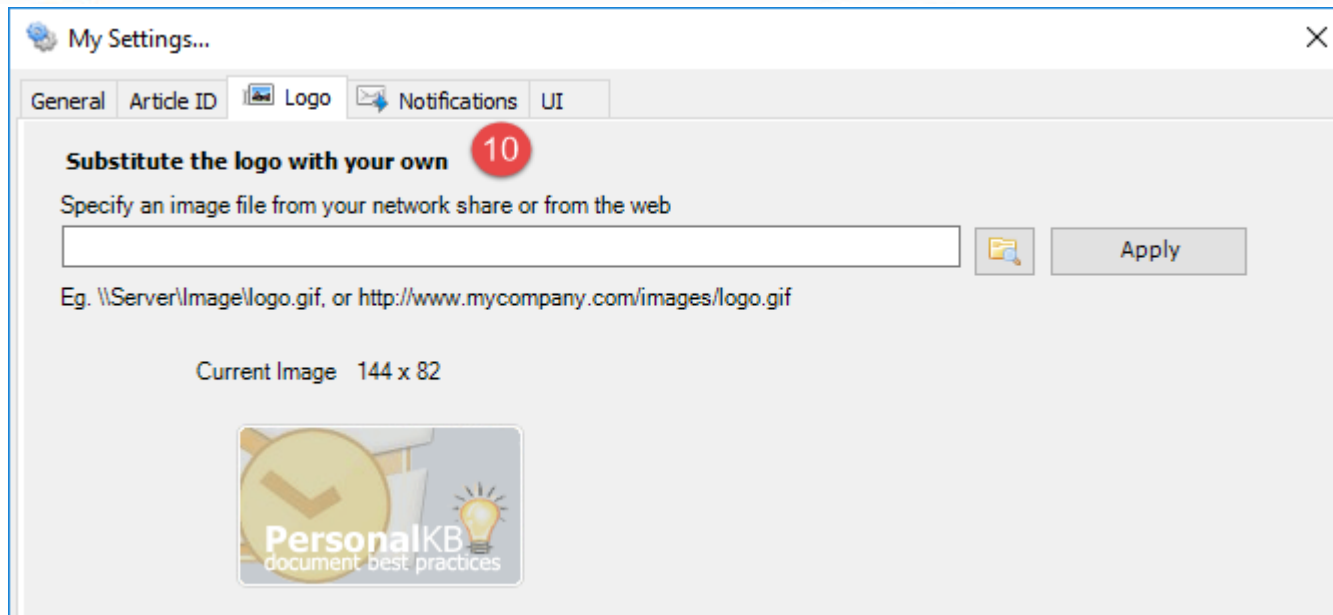
10 Substitute the logo with your own

To use your own company logo or brand in the KB form, you can specify an image file (JPG, GIF, PNG) located on a network shared folder. Or, alternatively, you can use an image file located on the web.

And when you open and view any KB article in Outlook, your company logo you specified above will show in the KB form.
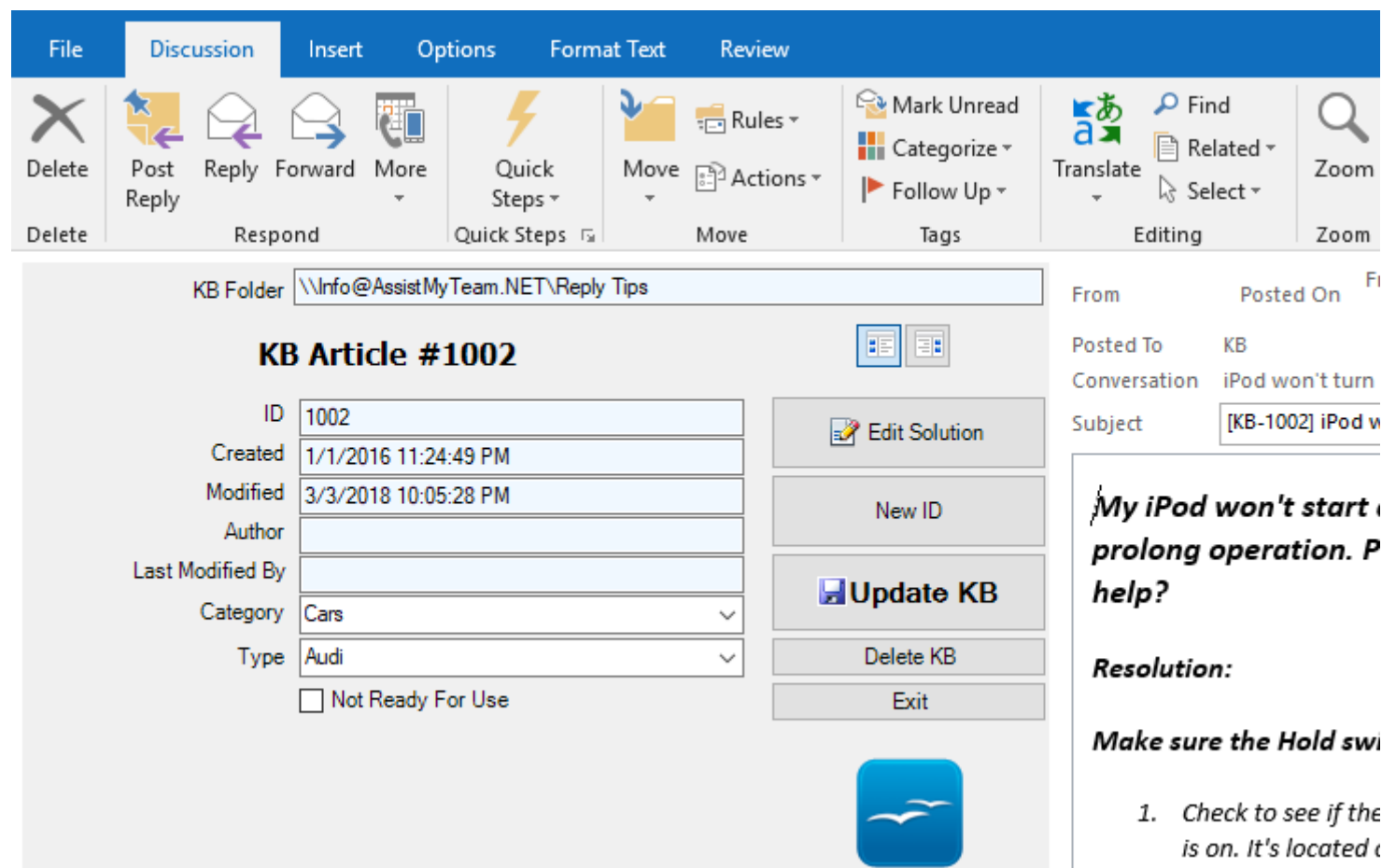
NOTE: Make sure you use an image path that is accessible to all users from their systems. This means, you can either make sure of an image file that is located on a shared network folder (e.g., \\Server\files\logo.gif) or an image from the web (e.g., www.company.com/logo.gif)

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Eg., abc@domain.com; xyz@domain.com

usr1@domain.com;usr2@domain.com;usr3@domain.com;usr4@domain.com;usr5@domain.com;usr6@domain.com;usr7@domain.com;usr8@domain.com;usr9@domain.com;usr10@domain.com

Notify the following stakeholders when a new KB is published – Enable this option to inform certain stakeholders (specified in the box) whenever a new KB article is published/generated in any of the administrator chosen KB folders.

NOTE: Make sure the stakeholders specified in the box are valid email addresses, each separated by a semi-colon (;)

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12 Placement of toolbars in Outlook- With these options, you can control the placement of the KB toolbars in Outlook explorer and inspector windows. You can also choose to place the KB toolbar to a dedicated tab.

5. Generating new Empty KB Article

To generate a new empty KB article, click the 'New Empty KB' menu in the KB toolbar in Outlook and choose the particular KB folder where this new KB will be stored.
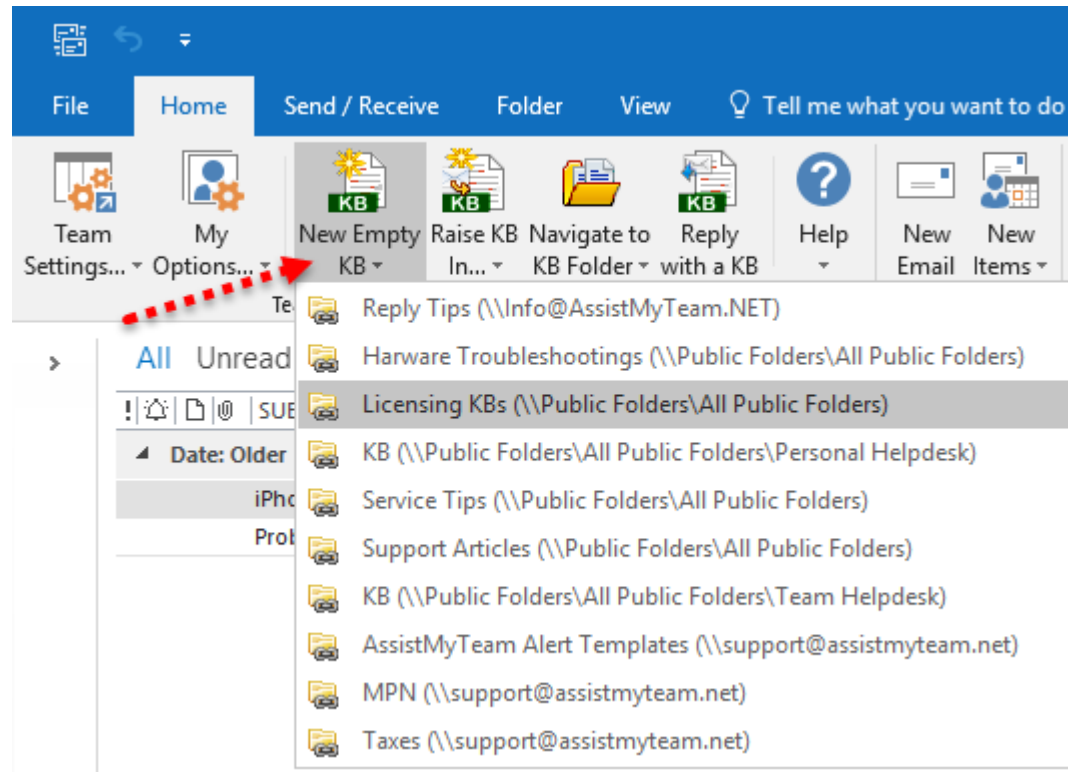
A new Outlook item (with the message class '**IPM.Post.TKB.Article**') will be generated in the folder, contents of which will be displayed in a special KB form. Enter the subject of the KB article (that best describe the problem or solution in a single line). And compose your KB solution in the body field of the item (such as you would compose any normal email in your Outlook).

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You can use feature rich formatting inbuilt tools of Outlook, embed images and attachments (just as you use to do while composing new emails). And don't forget to tag a category and type by choosing it from the drop-down fields within which this KB article falls within.

If the article is still in draft state i.e., not yet ready for use, check the '**Not Ready for Use**' option so that it is not shown in the KB Selection box when any user tries to choose a KB article for replying to an email or contact in Outlook.

6. Generating new KB Article from an email

Most often, you might have already written solutions and workarounds to certain issues from your customers through email communications.
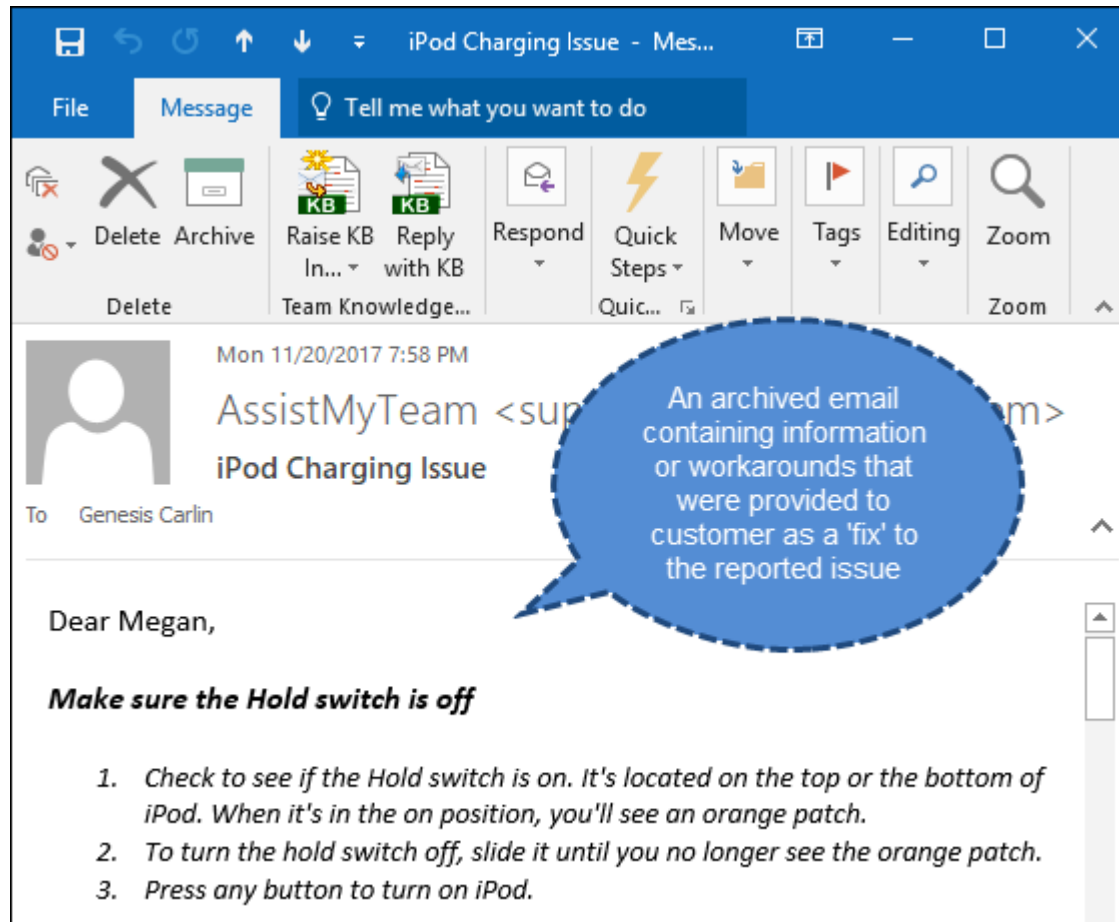
Such emails in your archive could potentially be a goldmine of knowledge of your organization. But mining such information at the time of needs can be tedious tasks for workers. They might have vague recollection of it. Another problem is navigating to such existing document libraries and past emails and searching for the right information at the moment of need often takes time and effort, not to mention the delayed response to the support request.
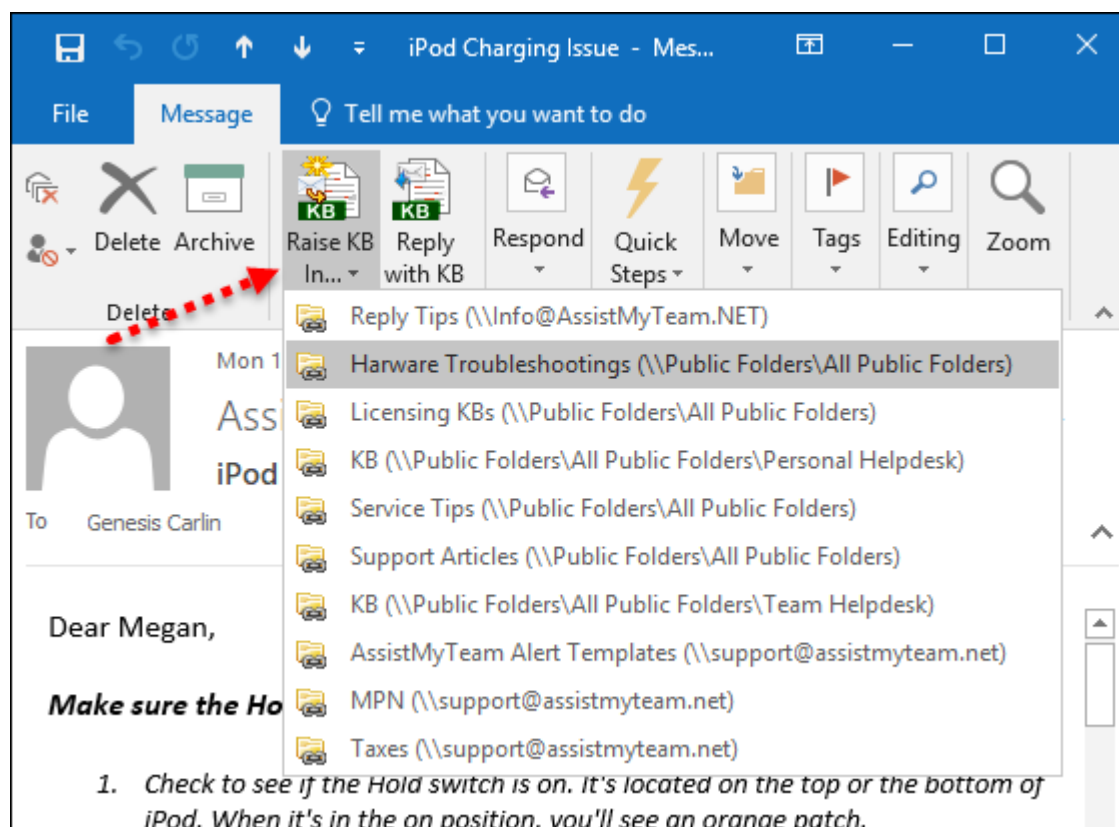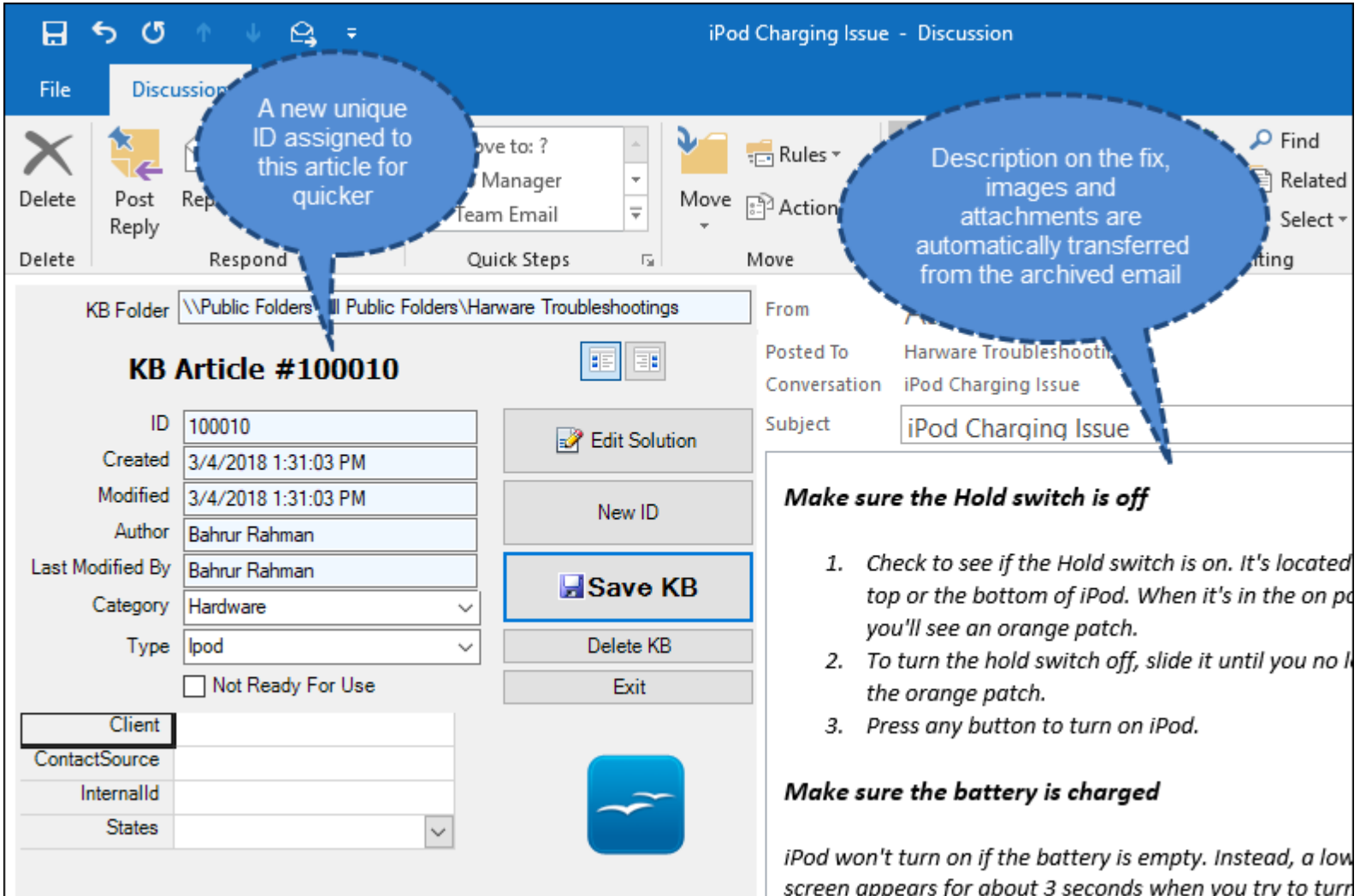
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reply to repeated queries in Outlook
with KB Articles

Personal Knowledgebase
for Outlook

Instead, with Personal Knowledgebase Add-in, you can raise new KB articles from such emails, assign a unique ID, catalogue and tag it with metadata such as category, type and other information specific to your business and store it to an appropriate centralized folder where it is available for use by your knowledge workers.

Once KB articles are mined from your archived emails and documents, what you end up is a series of well documented, organized articles that can be easily referenced, searched, catalogued and shared with your support staffs.

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7. Inserting a KB Article to a new email when composing

When you are composing a new email in Outlook, you can also insert a KB article directly by clicking the 'Insert a KB' button available in the Personal Knowledgebase toolbar.
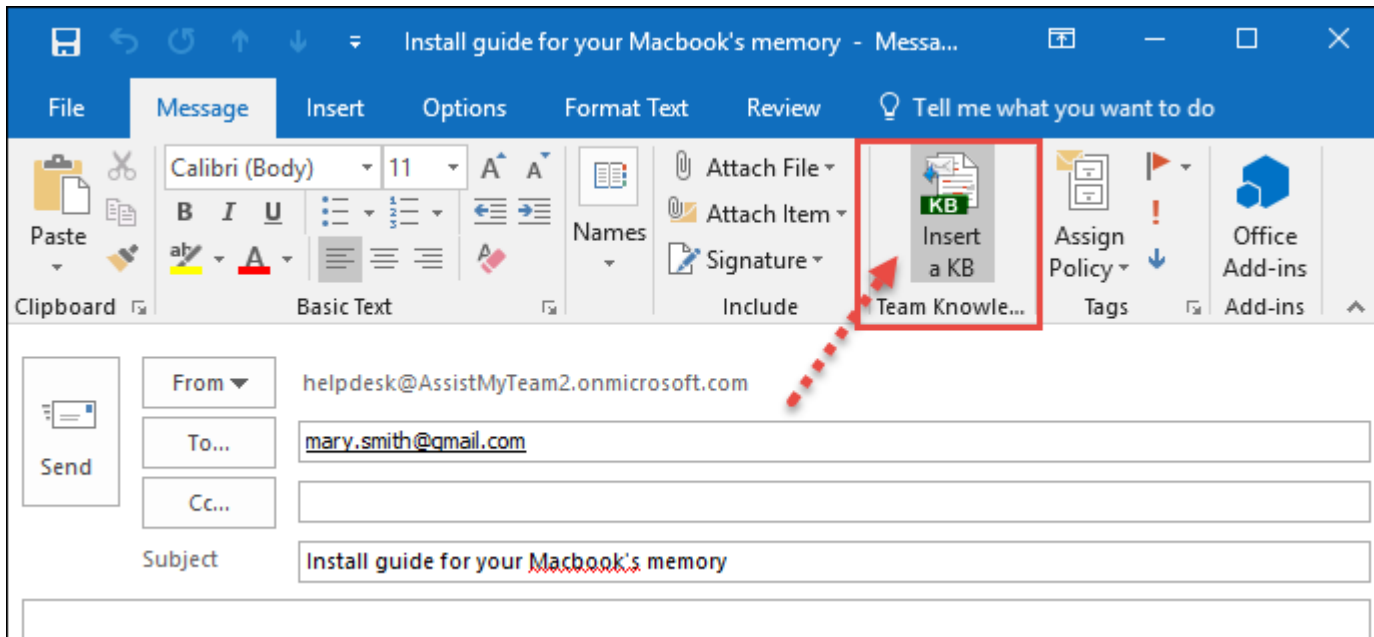
This will pop-up a selection box where you can search and choose an appropriate KB article for insertion into the email.
NOTE: You can perform keyword search and the matching KB article entries will be highlighted in light-red color.
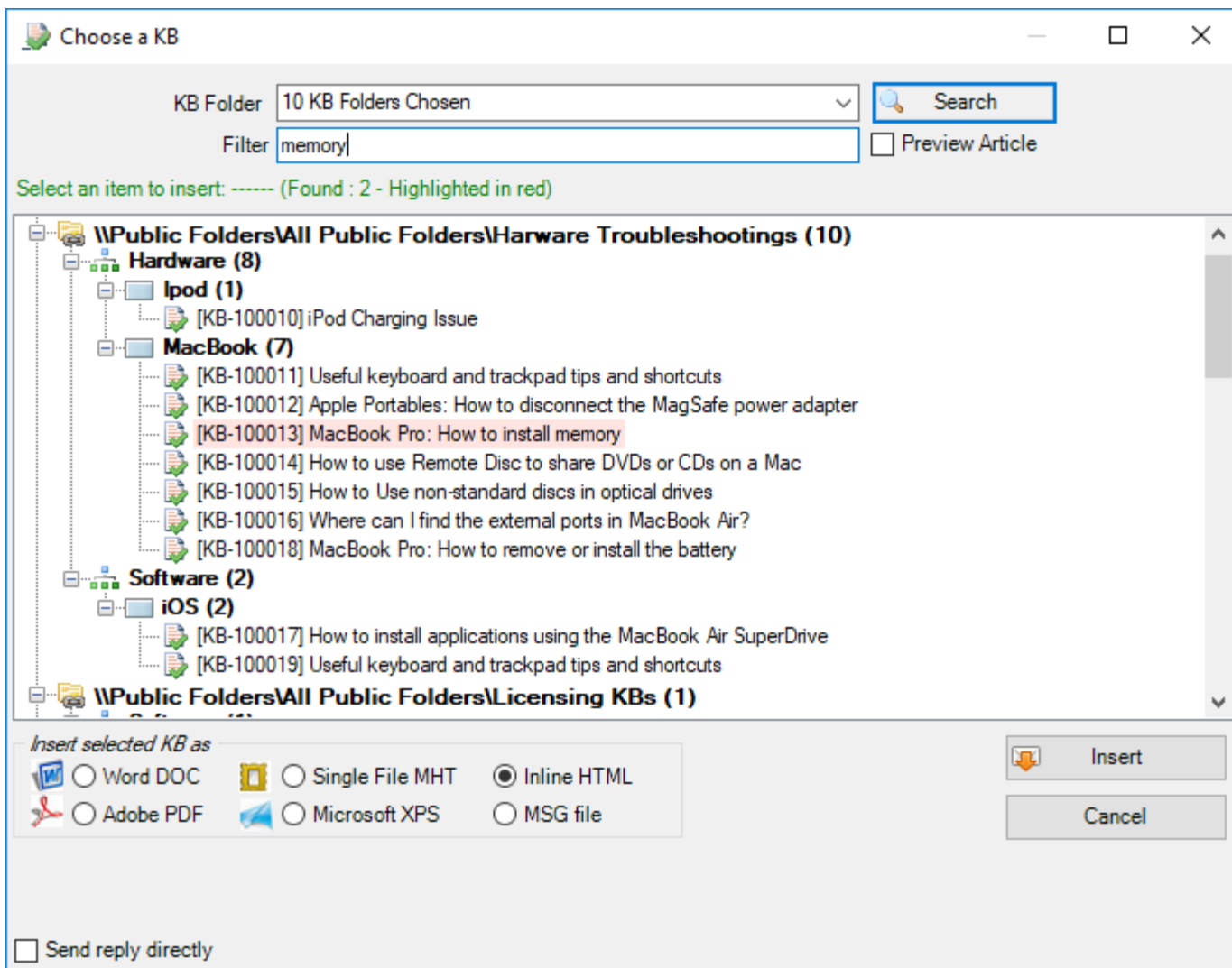
You have the options to insert the chosen KB article as file attachments in the form of Word Document (.docx), Adobe PDF (.pdf), Outlook MSG file (.msg), or as inline content. If the KB article has any additional attachments, these too will be copied to the email.

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reply to repeated queries in Outlook with KB Articles

Personal Knowledgebase for Outlook

Attachments from the KB article are also copied to the email

Selected KB article embedded as inline content in the email

Notice the actual KB article item below, along its formatting and its attachments. They all make it to the inline content that is embedded into the email (above).

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8. Reply a KB Article to an existing email

If your customer writes to you on a recurring issue, for which a KB article was already being published, you can directly hit 'Reply with a KB' button and choose that particular KB article from the selection box to insert it as file attachments (e.g., PDF attachment) or as inline content in the body of the email reply.

In the selection box (above), KB articles are arranged in a tree, with each KB folder representing as the root node, and category and type as child nodes. KB articles are then grouped by their types and categories, making it much easier to find an appropriate one by means of the context of the issue.

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You can choose from which Exchange folders to show the matching KB articles in the selection box.

To further refine the result, you can search by entering a keyword as filter. And KB articles matching that keyword(s) will be highlighted in red color. For instance, if the keyword was 'iPod' as filter, the entries matching 'iPod' are highlighted.


You can insert selected KB article in 2 ways to outgoing email:

1) Inserting chosen KB article as PDF, MSG or XPS file attachment to the email reply

Selected KB article can be applied or inserted into the replied email in varied format. You can choose to insert as attachment in the form of a word document (*.doc), Adobe PDF (*.pdf), Outlook Message file MSG (*.msg), Microsoft XPS (*.xps) or as single file MHTML (*.mht).

## 2) Inserting chosen KB article as inline content to the email reply

You can also embed the selected KB article directly into the body of the email reply. Any inline images and formatting are preserved in its original state in the reply also.
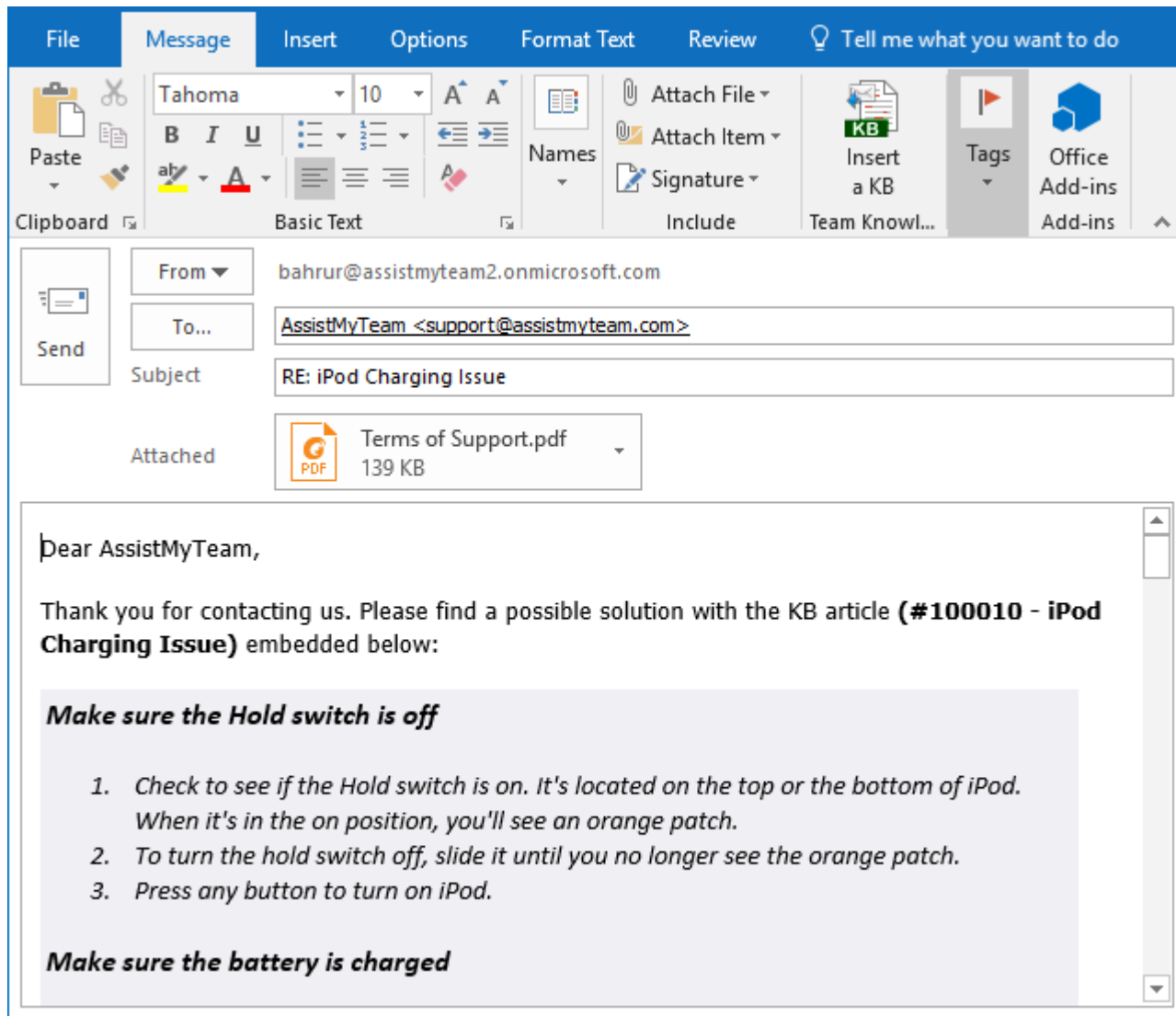
Optionally, you can choose if to send the reply containing the inserted KB article directly to the recipient or display the inspector compose window, so that you can add further information such as attachments or tweak the content.
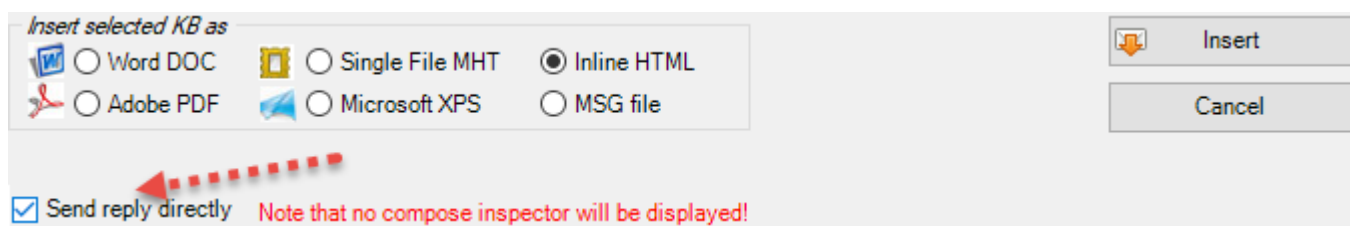

Lastly, you can customize the reply template headers that are used in the email reply from **Outlook > Personal Knowledgebase toolbar > My Options > Reply Templates**.

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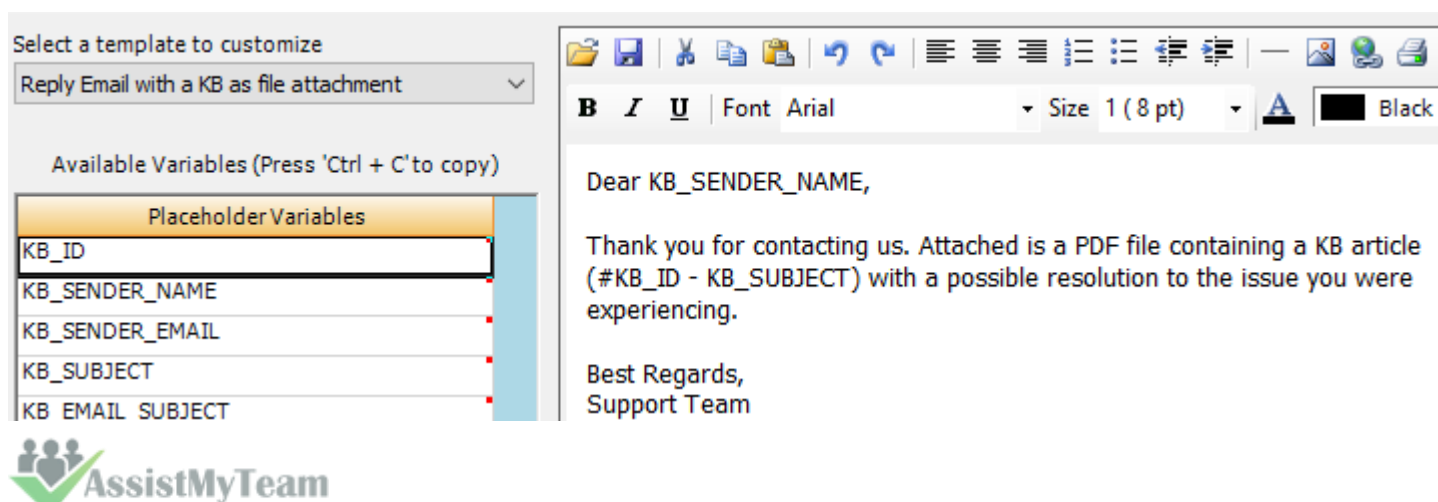
## 9. Send a KB Article to an Outlook contact

To send a KB article to an Outlook contact (address book), click '**Reply with a KB**' button on the Personal Knowledgebase toolbar in Outlook, and from the selection box, choose the appropriate KB article to send an email with the chosen KB article.
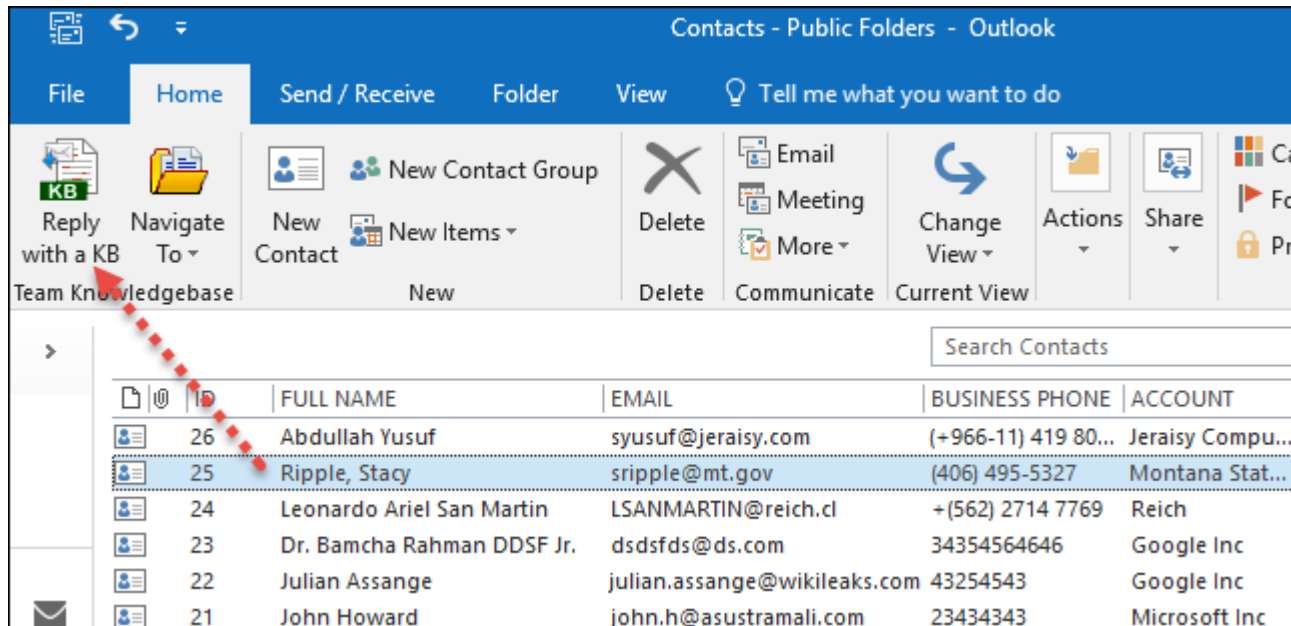
Before finalizing on a KB article for insertion from the selection box, you can preview the content of the article by checking 'Preview Article' option (located just below the 'Search' button). And the preview will be available at the right side.

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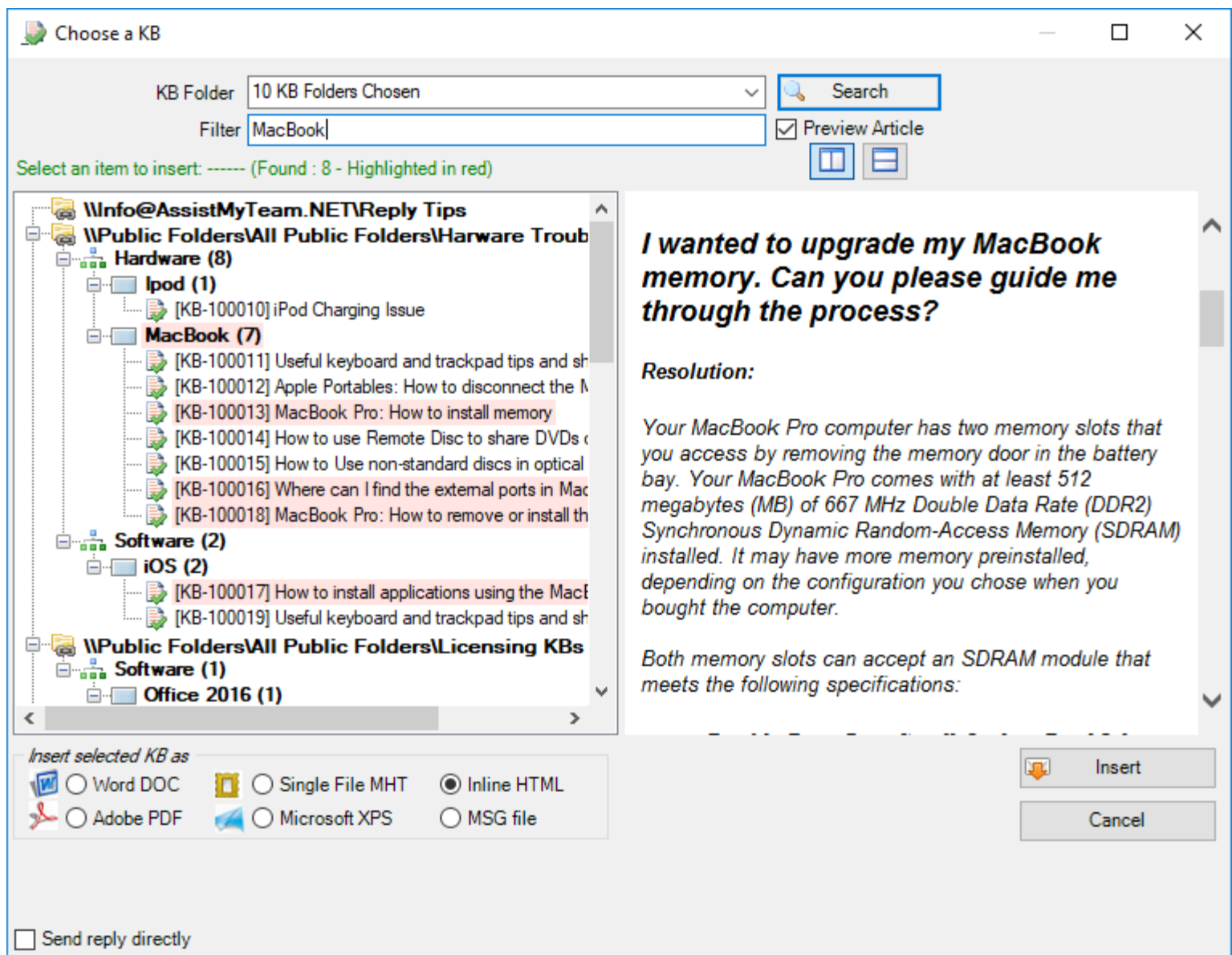
And when you visually confirm your choice, click 'Insert'. And this will create a new email having the same subject as that of the chosen KB article and the email content/body will use the 'Reply Template' where the placeholder variables are substituted with information from the chosen KB article.
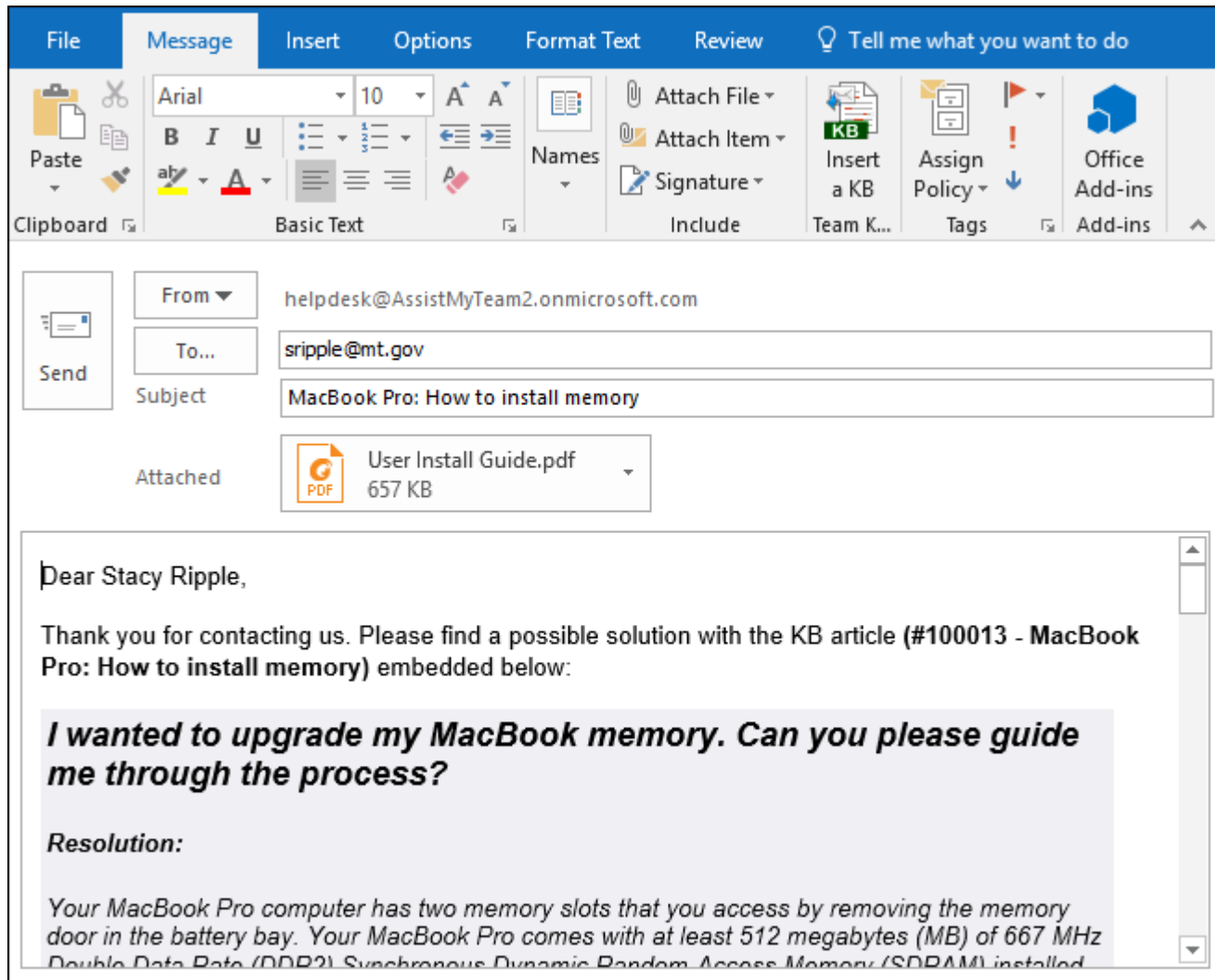

If there are any attachments in the chosen KB article, they too will be copied/attached to the outgoing email.

10. Navigate to the KB Folders

Your Administrator would surely have chosen and configured few or many Exchange KB Folders where KB articles are stored. And if these folders are shared with adequate permission levels to view the contents (at the very least), you can navigate quickly to any of these chosen KB folders from your Outlook in a single click, without searching for it in the hierarchies of folders.
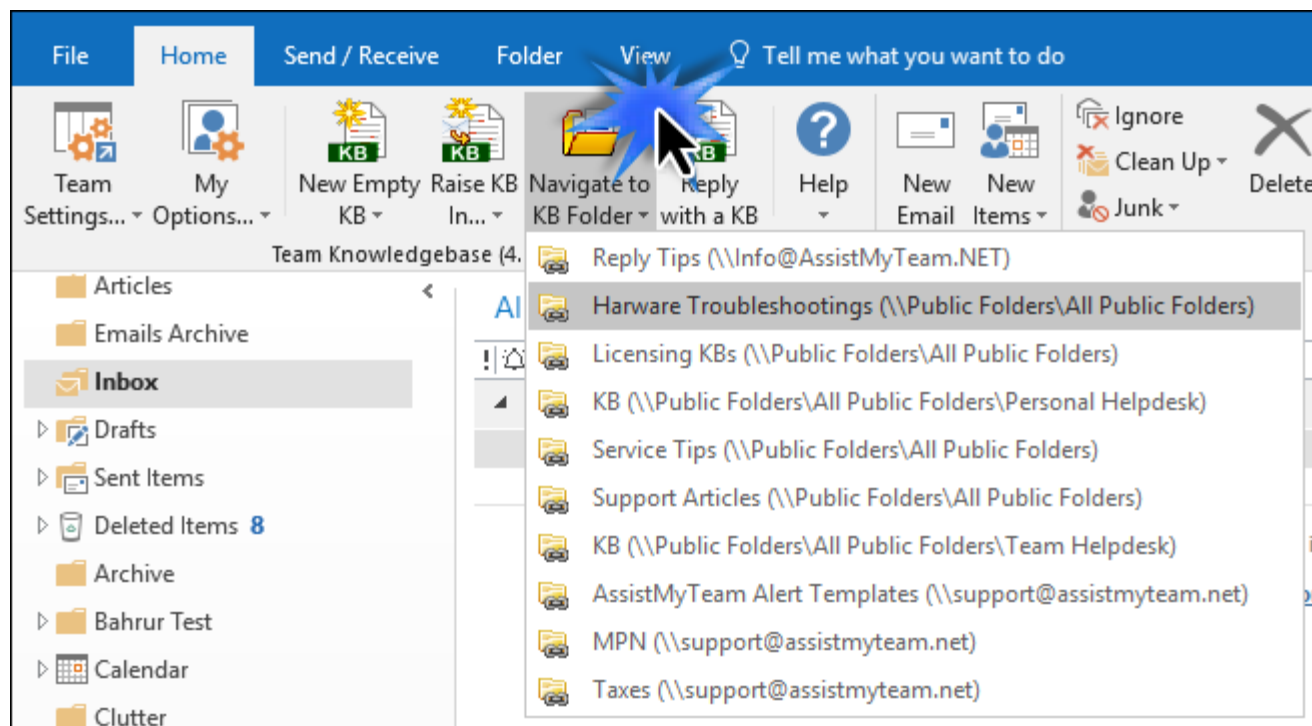
Further, if you had installed the Personal Knowledgebase Admin add-in, you will find a special button '**Ensure IDs**' in the KB toolbar in each of the chosen KB folder. You can use this button to process any emails or items that still have not got a unique ID.
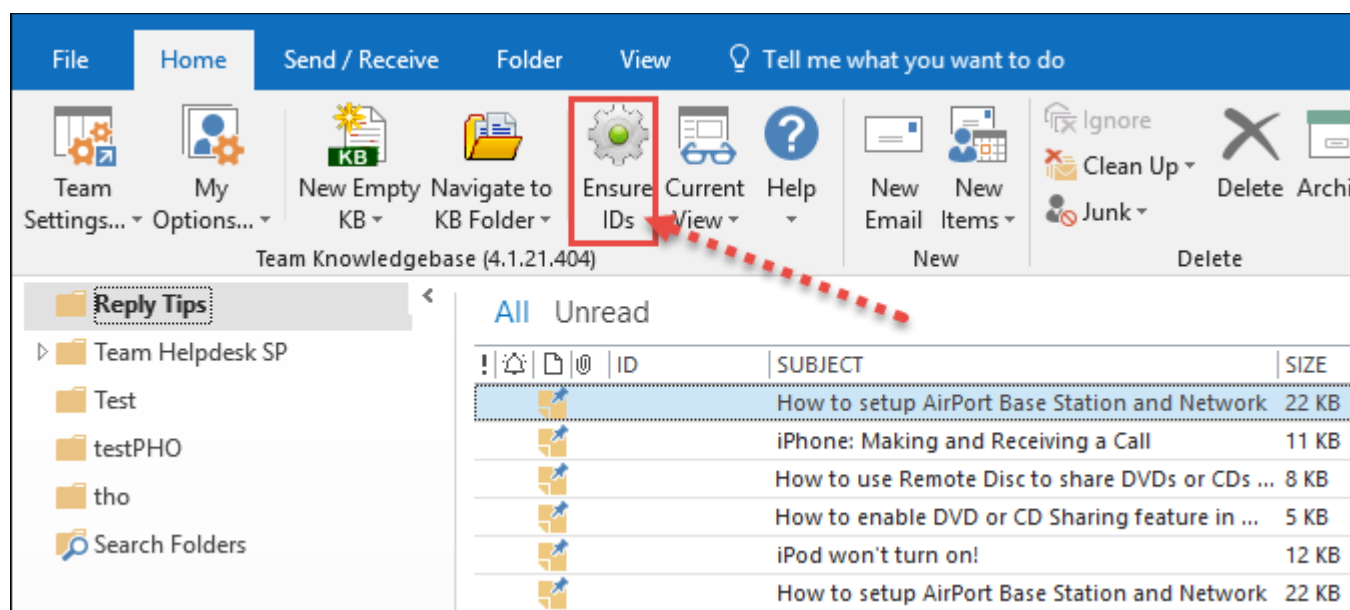
Click start to process items in the current KB folder that still have not got a unique ID.

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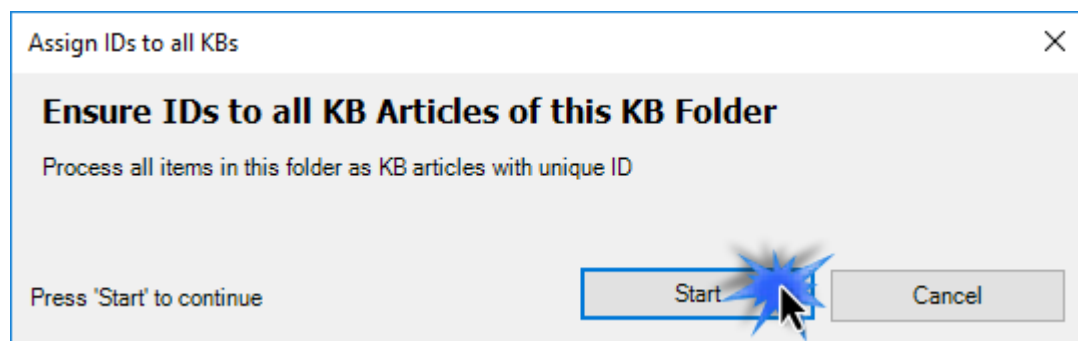
And the outcome is the assignment of IDs to any KB articles without it.

! ⌂ 🗋 📎	ID	SUBJECT	SIZE
	100021	How to enable DVD or CD Sharing feature in MacBook...	5 KB
	100022	How to Use non-standard discs in optical drives	9 KB
	100023	How to use Remote Disc to share DVDs or CDs on a Mac	8 KB
	100024	MacBook Pro: How to install memory	15 KB
	100025	MacBook Pro: How to remove or install the battery	5 KB
	100026	Useful keyboard and trackpad tips and shortcuts	9 KB
	100027	How to use Remote Disc to share DVDs or CDs on a Mac	8 KB
	100028	Troubleshooting the MacBook Air SuperDrive	5 KB
	100029	How to setup AirPort Base Station and Network	22 KB
	100030	How to setup AirPort Base Station and Network	22 KB
	100031	iPod won't turn on!	12 KB
	100032	How to use Remote Disc to share DVDs or CDs on a Mac	8 KB
	100033	Apple Portables: How to disconnect the MagSafe pow...	5 KB
	100034	How to enable DVD or CD Sharing feature in MacBook...	5 KB
	100035	Where can I find the external ports in MacBook Air?	10 KB
	100036	iPhone: Making and Receiving a Call	12 KB
	100037	Useful keyboard and trackpad tips and shortcuts	9 KB
	100038	How to Use non-standard discs in optical drives	9 KB

11. Arranging and viewing KB articles in Folders

Once you are in any of the KB folder, you can use one of the pre-defined Outlook views (specifically designed for KB articles) under 'Current View' menu to organize and group articles by ID, categories and types, author and status etc.
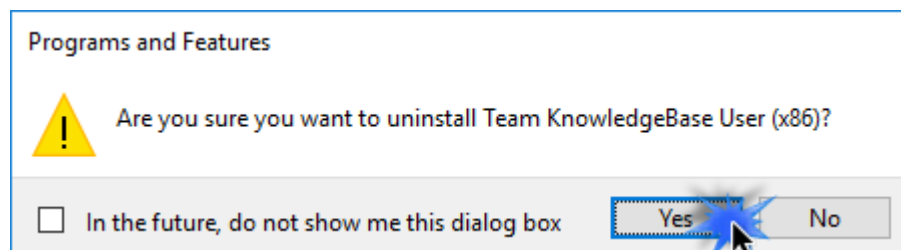
12. Uninstalling Personal Knowledgebase add-in

To uninstall the Personal Knowledgebase Add-in tool from your computer, follow the steps outlined below:

Step 1: Go to '**Control Panel > Programs and Features**'. Scroll down to select 'Personal Knowledgebase' (x86 or x64) and click 'Uninstall' as illustrated below:
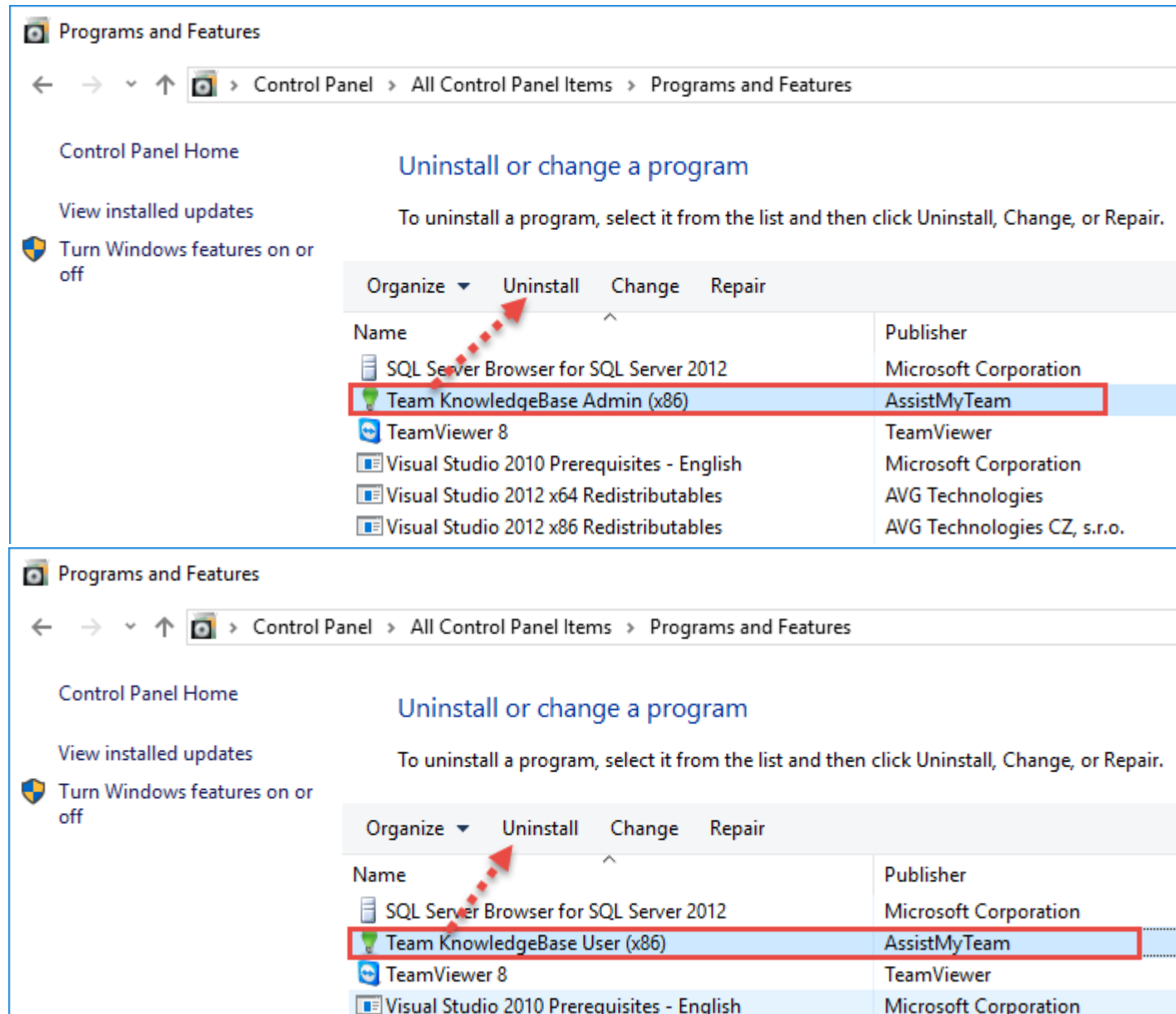
Step 2: A dialog confirmation follows asking for confirmation. Click **Yes**.

Step 3: The Personal Knowledgebase setup will now start the un-installation process. Make sure that Microsoft Outlook is not running (even under the task manager).

Personal Knowledgebase
for Outlook

13. Important links

Personal Knowledgebase for Outlook - Homepage
Go to the official website of Personal Knowledgebase for Outlook.

Video Tutorial clips
Watch video tutorials that teach you how to install, configure and work with Personal Knowledgebase.

Purchase License
Purchase an enterprise team license for Personal Knowledgebase for Outlook.

Support Maintenance contract
At AssistMyTeam, we're committed to give you the best support for all the products that we offer and more! The AssistMyteam Support Contract helps you use our products more efficiently and work out any issues that you encounter during the course of their use.

Submit an online support ticket
Use this web form to create a ticket with AssistMyTeam Technical Support.

AssistMyTeam