Personal Knowledgebase for Outlook & SharePoint
Installation and Configuration

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

For **'Per User Installation'** *(ideal for standalone single user/workstation)*
PersonalKBSPSetup_x86.zip (for 32-bit Outlook 2010, 2013, 2016, 2019)
PersonalKBSPSetup_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 SharePoint lists**

I) Files Installation

Step 1. Run the *PersonalKBSPSetup_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.
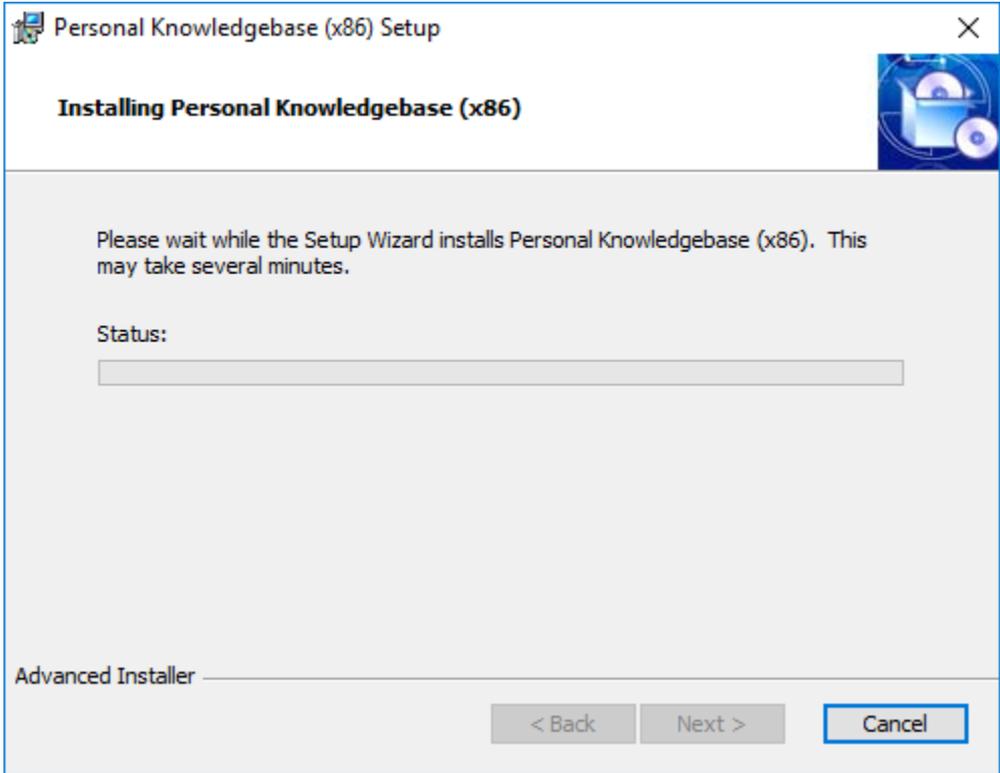

Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.
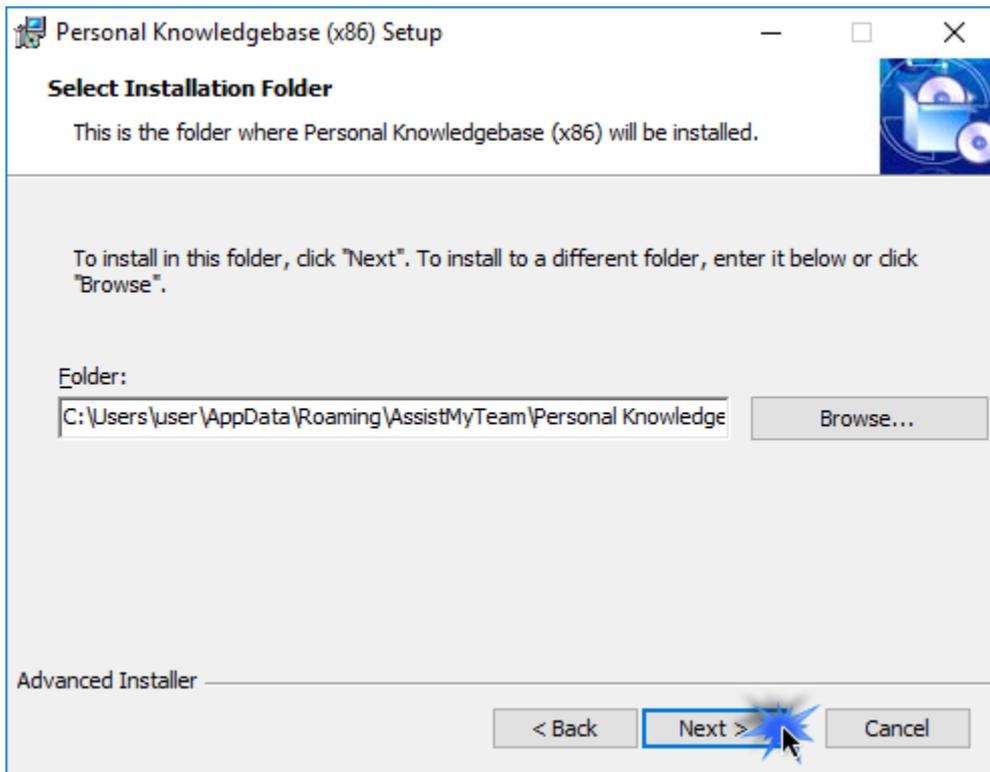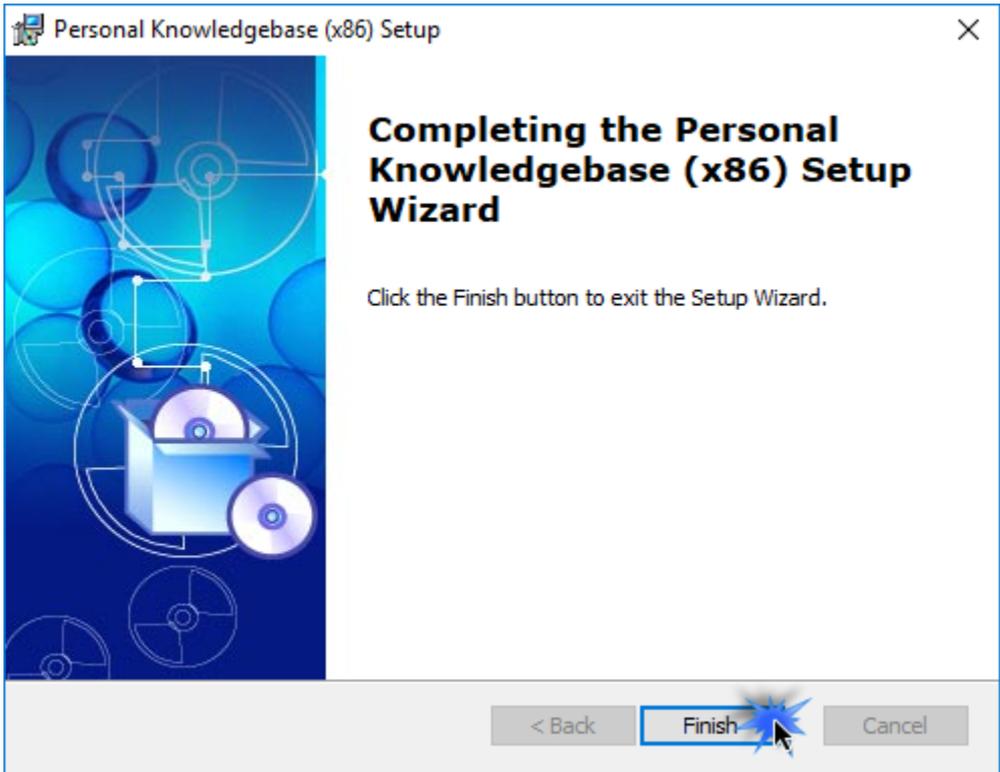
Step 3. It just takes a few minutes to complete the whole copying process

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.
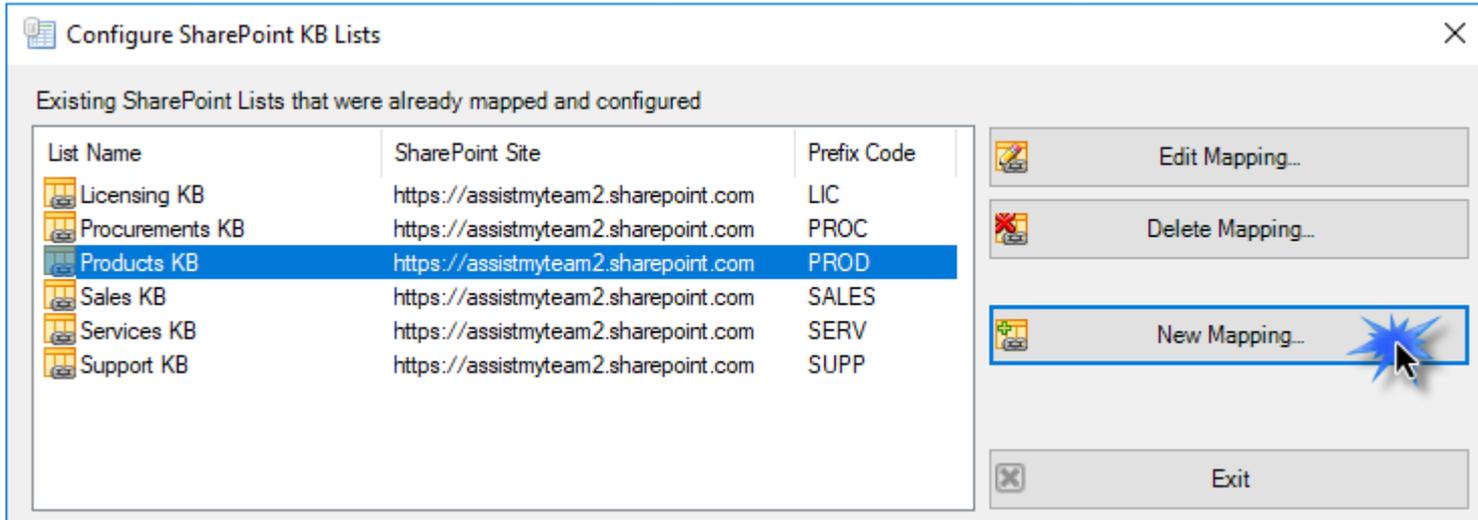
II) Choose KB SharePoint lists

Before you can start generating KB articles from Outlook to SharePoint or using them in Outlook from SharePoint, you need to choose the destination SharePoint lists that store the KB articles and link them up with the Add-in. Once linked, you would be able to use KB articles from SharePoint in Outlook to reply to emails, as well as generate new KB articles in one of the chosen SharePoint list using information and content from emails in Outlook.

To configure a new SharePoint list and map fields with the Outlook mails, go to **My Settings menu > 'Configure SharePoint KB Lists'**.
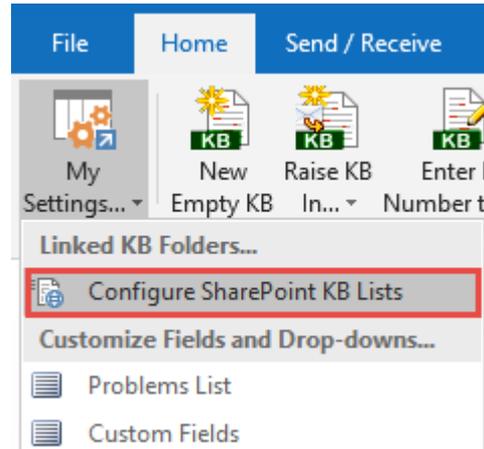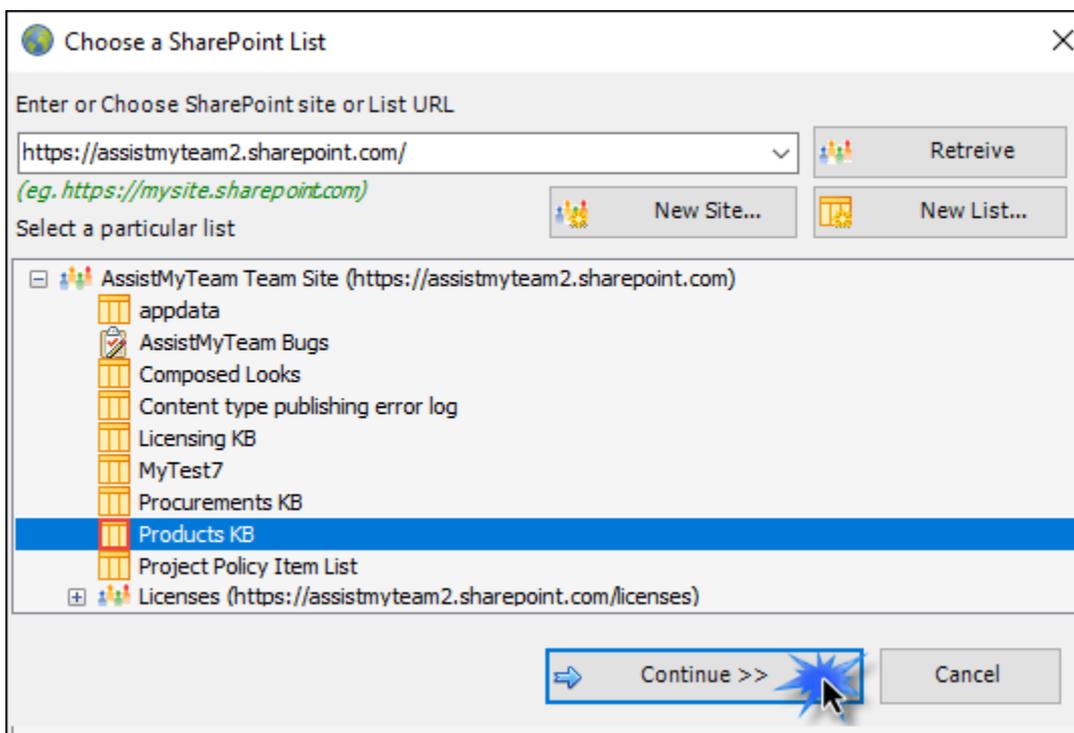

Here is a listing of all KB SharePoint lists containing KB articles that are linked using the add-in tool.


To choose and configure a new KB SharePoint list, click **'New Mapping…'** button.

You will then be prompted to enter the SharePoint site URL, and it would allow you to choose a SharePoint list.

You can choose re-use existing SharePoint lists or create new one for this purpose. Ideally, we recommend that the SharePoint lists you will choose for used with Personal KB add-in were derived from the inbuilt '*Custom List*' template in your SharePoint.
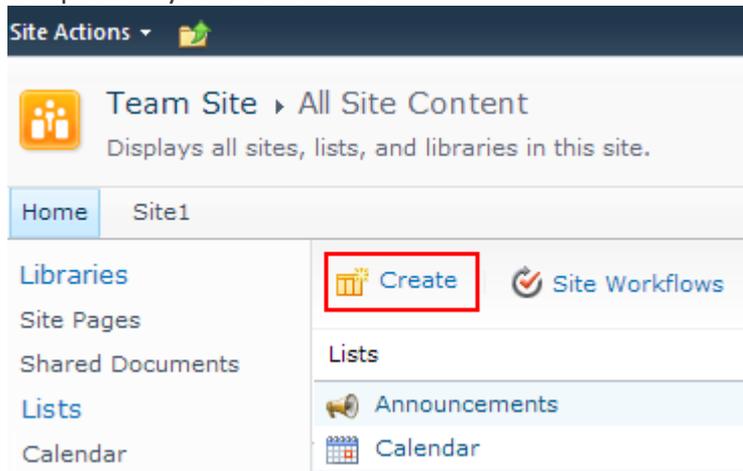
For instance, you can create a new list (e.g., KB) based on the '*Custom List*' template below:
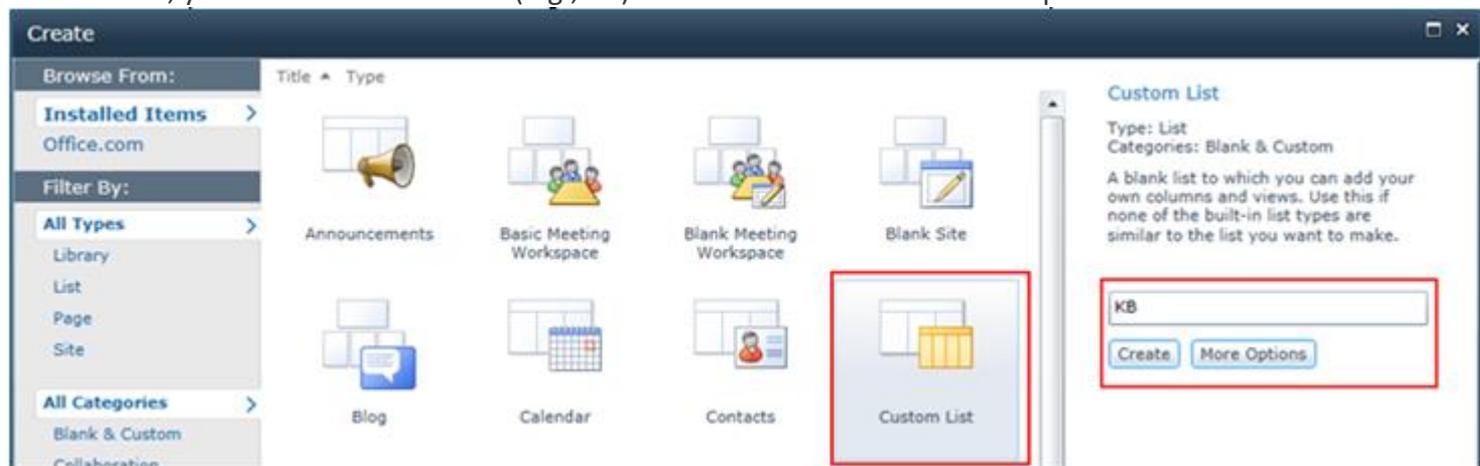
And then choose this newly created SharePoint list (e.g. KB) or any other existing lists from the mapping tool and click 'Confirm'.
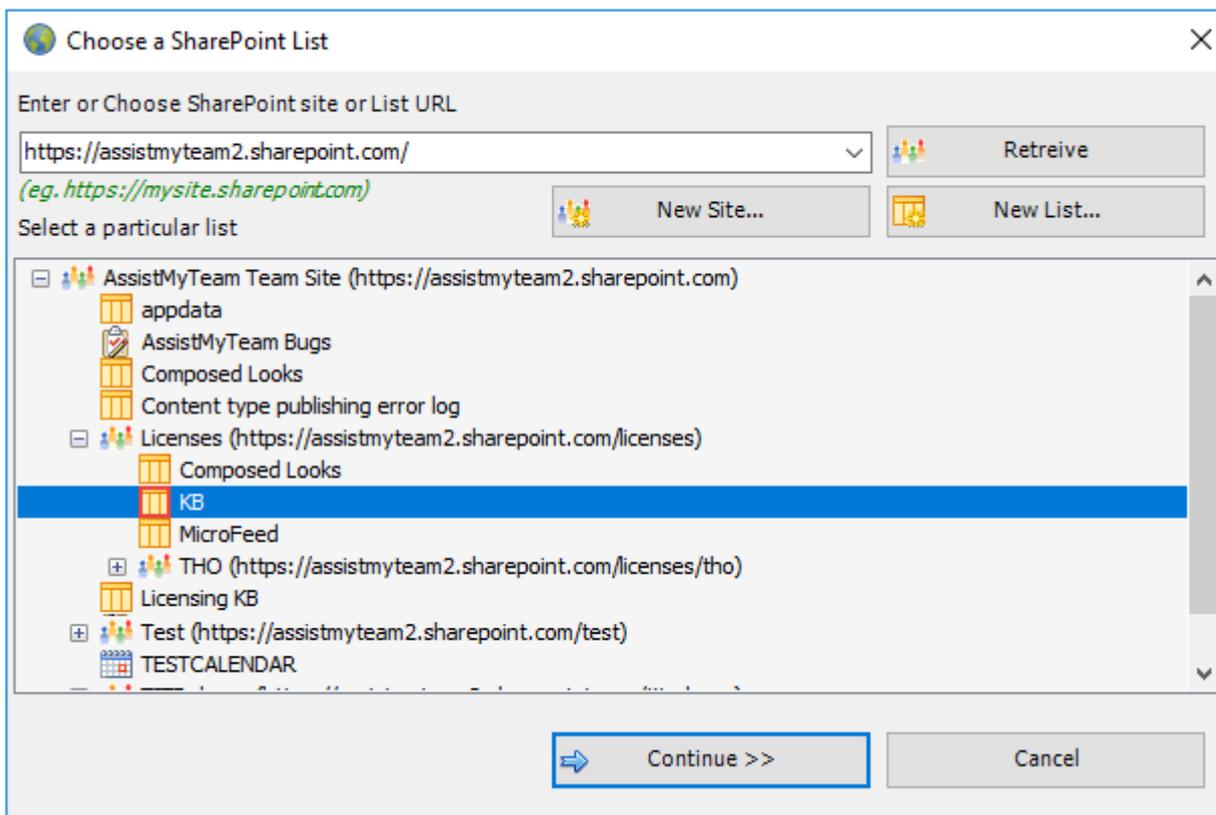
Instead of creating the new site/list in the SharePoint using your web browser, you can also choose to create – new site or list directly from the add-in.

① **New Site** – Create a new site directly under the chosen parent site to be used exclusively for Personal KB add-in. By default, the site will be created as a blank site, unless a different site template is specified.

Enter New Site Info ✕

🏢 **New Site...**

Title	Licenses	*
Template	Blank Site ⌄	*
URL Name	https://assistmyteam2.sharepoint.com/ Licenses	*
Description	This site is used for Licenses KB and other resources	
Language	English	

☑ Use same permissions as parent site

Create   Cancel

* Mandatory Fields

② **New List** – You can choose to create a new list directly under the chosen site. By default, the list would be created using the '*Generic List*' (custom list) template available in your SharePoint. However, you can change the template from the drop down.

Enter Info for New List ✕

📋 **New List...**

to be created under:
https://assistmyteam2.sharepoint.com/licenses/

List Name	KB	*
Template	Generic List ⌄	*
Description	Stores KB articles on License Acquisition	

Create   Cancel

* Mandatory Fields

After choosing a destination SharePoint list (either by creating a new one, or by selecting an existing list), you can proceed to start mapping the fields between Outlook and SharePoint.

Through the mapping tool, you can choose which fields from the emails in Outlook are to be extracted and published to the SharePoint KB list and perform the mapping between these chosen fields of the emails to that of the SharePoint KB list.

Page | 6
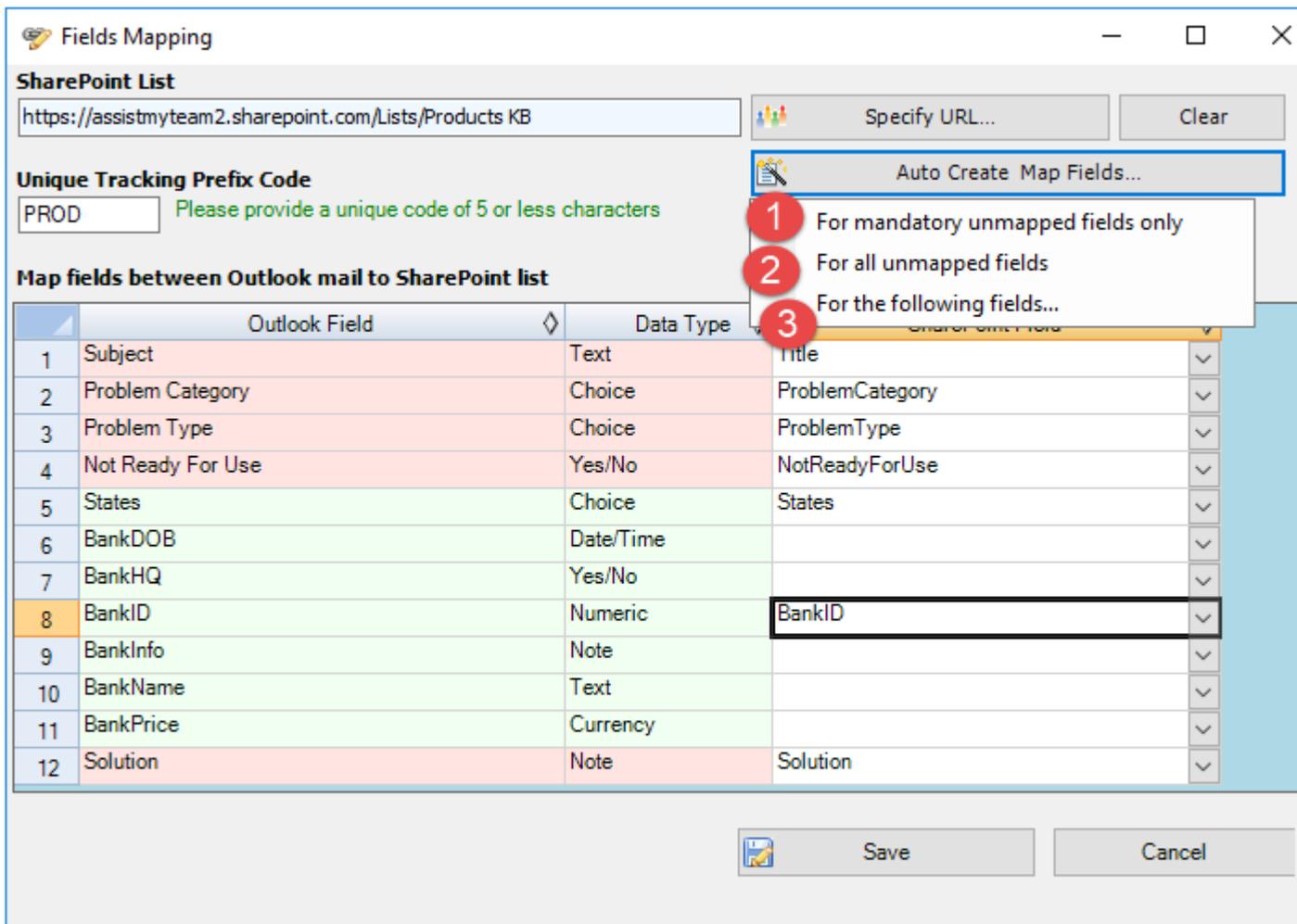
A mapping is nothing but an association between an Outlook field (e.g., *subject of the mail item*) to a specific SharePoint list field (e.g., *Title*). You have complete control over which data goes to the SharePoint list from Outlook. In the mapping dialog box (above), the first column lists all the email fields as available in Outlook. The second column displays the data type of the field. In the last column, there is a drop-down list on each row, consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field. For example, in the screenshot above, Outlook field *'Problem Category'* is mapped to SharePoint field *'ProblemCategory'*.

You can choose to auto create the required fields in the SharePoint list as well as auto-map the fields between the Outlook and SharePoint.

1 **For mandatory unmapped fields** - Click this option under the *'Auto Create & Map fields'* menu to create the mandatory KB fields in the chosen SharePoint list on the fly and automatically complete the mapping. Mandatory fields are marked/colored in light red. The following fields are mandatory to complete the mapping - *Subject, Solution, Problem Category, Problem Type, Not Ready For Use*.

2 **For all unmapped fields** – Click this option under the *'Auto Create & Map fields'* menu to create all the KB fields that have not been mapped yet in the chosen SharePoint list and complete the mapping automatically. If the chosen SharePoint list have any matching existing fields, instead of creating new ones, the add-in will try to use them to map with the KB fields. For instance, if the chosen SharePoint list was created based on the *'Custom List'*, the list already contains predefined fields such as *Title, Description* etc.

3 **For the following fields** – Click this option under the *'Auto-Create & Map fields'* menu to choose specific KB fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.
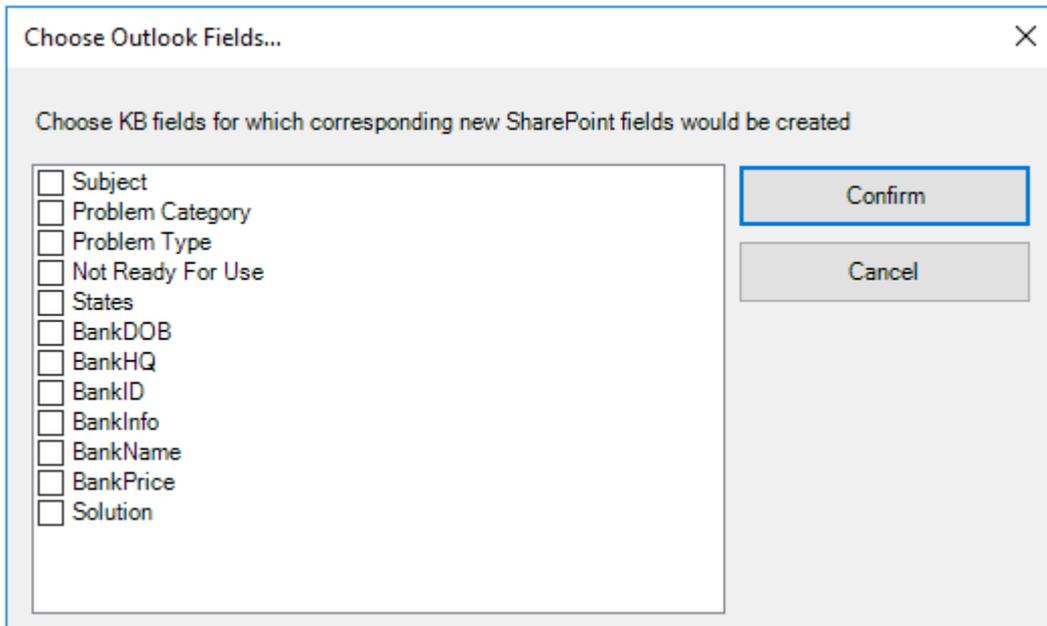
Optionally, to have finer control, you can also manually create new fields in the chosen destination SharePoint list and map with the KB outlook fields.

Create New SharePoint Field - on the fly
In the drop-down list of the SharePoint field, you will also notice that there is an item '**[NEW LIST FIELD]**'. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, without requiring you to create it in your SharePoint site.

Specify a field name that you would like to appear in the SharePoint list. Only input valid characters and avoid using special characters such as symbols.
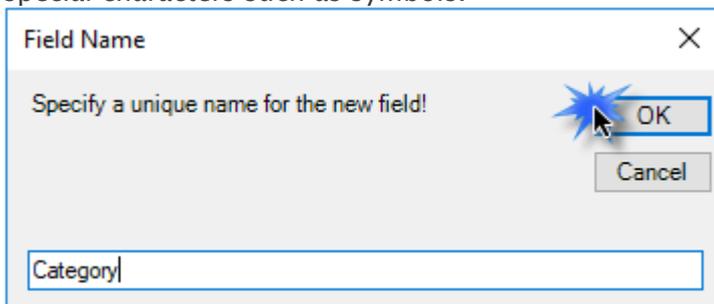
The new SharePoint field will have the same data type as that of the corresponding Outlook field.

	Outlook Field	Data Type	SharePoint Field
1	Subject	Text	Title
2	Problem Category	Choice	Category
3	Problem Type	Choice	ProblemType
4	Not Ready For Use	Yes/No	NotReadyForUse
5	States	Choice	States
6	BankDOB	Date/Time	BankDOB
7	BankHQ	Yes/No	BankHQ
8	BankID	Numeric	BankID
9	BankInfo	Note	BankInfo
10	BankName	Text	BankName
11	BankPrice	Currency	BankPrice
12	Solution	Note	Solution

NOTE: Those fields with light green background color are custom fields which you can define in **Outlook > My Settings > Custom Fields** panel so that you can have additional fields to best describe and add metadata on the KB article.

If you have added multiple SharePoint KB lists in Personal KB add-in, you will notice that the **'Raise KB in'** drop down menu shows all of them. You and other users can then simply choose the destination SharePoint list to which a new KB will be raised from the selected email in Outlook.
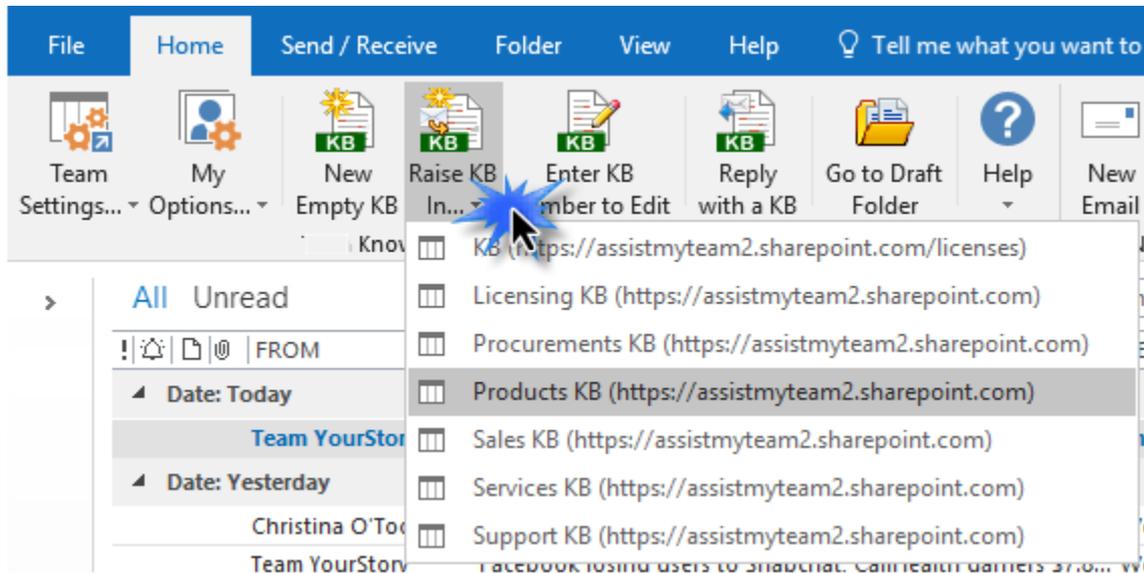
You can define, map and link any number of SharePoint lists from multiple sites so that, you can have a choice to choose a particular SharePoint list of interest to which new KB from their emails can be raised from their Outlook, or more importantly, choose an existing KB article from one of the relevant SharePoint list to reply to an email in Outlook.
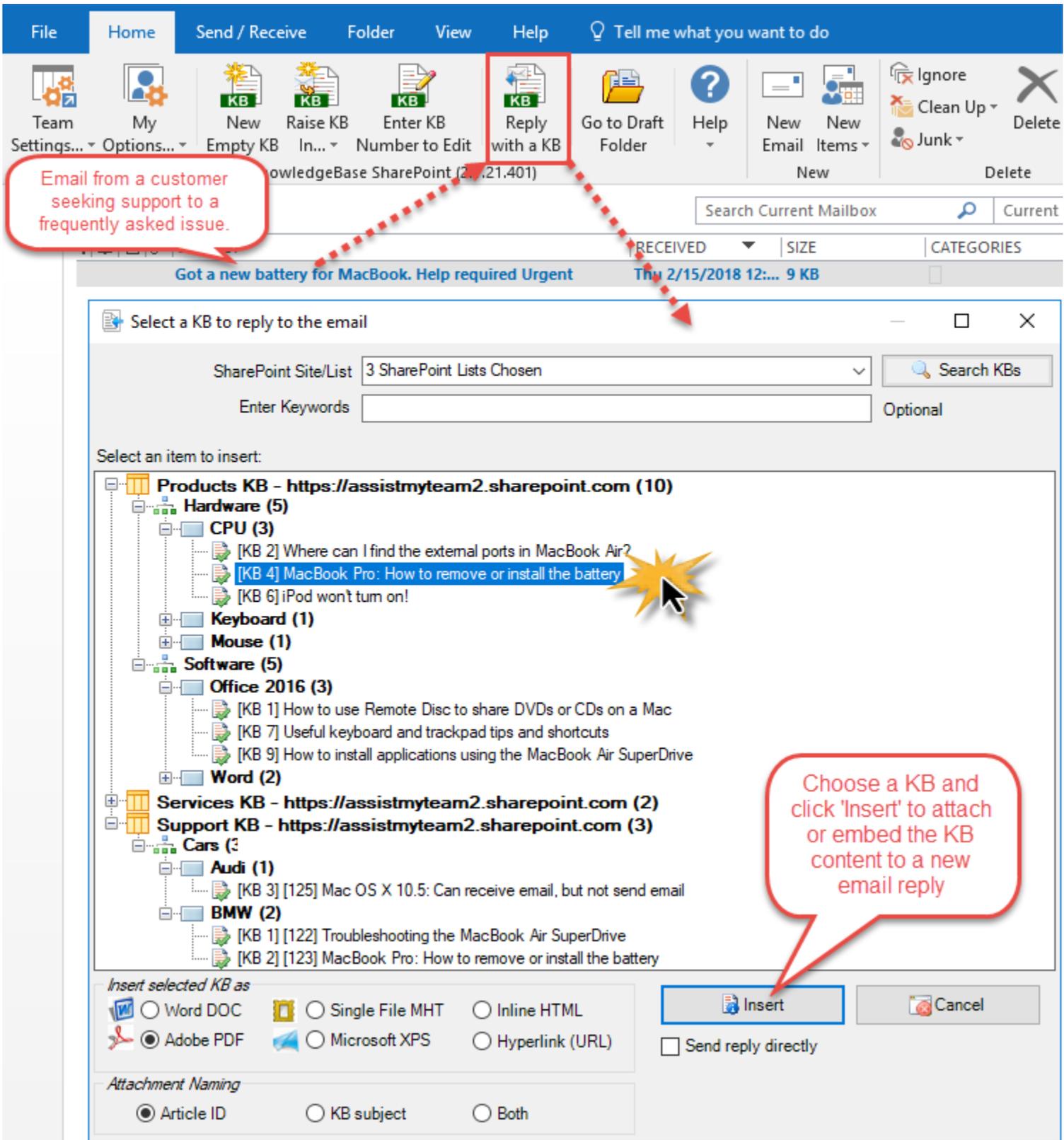
NOTE: *There are other administrative configurations that you would need to undertake. These options are available in the 'My Settings...' drop down menu of the Personal KB toolbar or ribbon in Outlook.*

*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.

---- End of Install Guide