

Team Knowledgebase for Outlook & SharePoint

Help Manual for Administrator and Users



Welcome

Use KB articles stored on your Microsoft SharePoint lists to reply to support emails in Outlook seamlessly

This is an elaborate help documentation that will guide you how to work with both management and user modules of Team Knowledgebase for Outlook & SharePoint. For a quick overview, refer to our video demonstration available on the product website.





Table of Contents

Welcome	1
1. Why do you need a knowledgebase?	3
2. Introduction	4
Purpose of this add-in	5
3. How does it work?.....	6
Step 1: Administrator configures SharePoint KB lists and performs mappings.....	6
Step 2: Team members install Team KB User tool	7
Step 3: Accessing KB articles from Outlook and inserting to email replies	9
4. Requirements	11
5. Centralized Administrative Settings.....	12
5.1 Configure KB Settings Data Source	13
5.2 Choose and configure KB SharePoint Lists.....	16
5.3 Problems List	22
5.4 Custom Lists	23
5.5 Custom Fields	24
5.6 Templates Manager	25
5.7 Advanced Options	26
5.8 Search KBs	30
6. User Preferences and Options	32
6.1 Configure KB Settings Data Source	32
6.2 My Preferences	35
6.3 Reply Templates.....	37
6.4 Clear Cache Credential	38
6.5 Search KB Articles stored in SharePoint from Outlook	38
7. Generating new Empty KB Article.....	39
8. Generating new KB Article to SharePoint from an email.....	40
9. Inserting a KB Article to a new email when composing.....	42
10. Reply a KB Article to an existing email.....	44
11. Send a KB Article to an Outlook contact	48
12. Navigate to the Draft KB Folder	50
13. Open KB SharePoint lists in web browser	51
14. Uninstalling Team KB Admin and User add-ins.....	52
15. Important links	53



1. Why do you need a knowledgebase?



You and your team 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 for your organization:

- ✓ **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

Team Knowledgebase for Outlook & SharePoint is installed as a COM Add-in for Microsoft Outlook 2010/2013/2016, and uses one or more SharePoint lists, for storing and sharing knowledge base articles throughout the organization. The Add-in makes it very easy for support staff to search and locate a knowledge base article relevant to a customer issue from within Outlook and insert it to the outgoing email reply as PDF file attachment or embed as inline content or as hyperlink URL. All these without requiring switching back and forth between Outlook and SharePoint.

Team Knowledgebase can help your support team to 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 your support team all use Microsoft Outlook, every day, all the time, to attend to emails from end-users, Outlook needs to do more than just acting as a simple email-client. Team 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, your team 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.

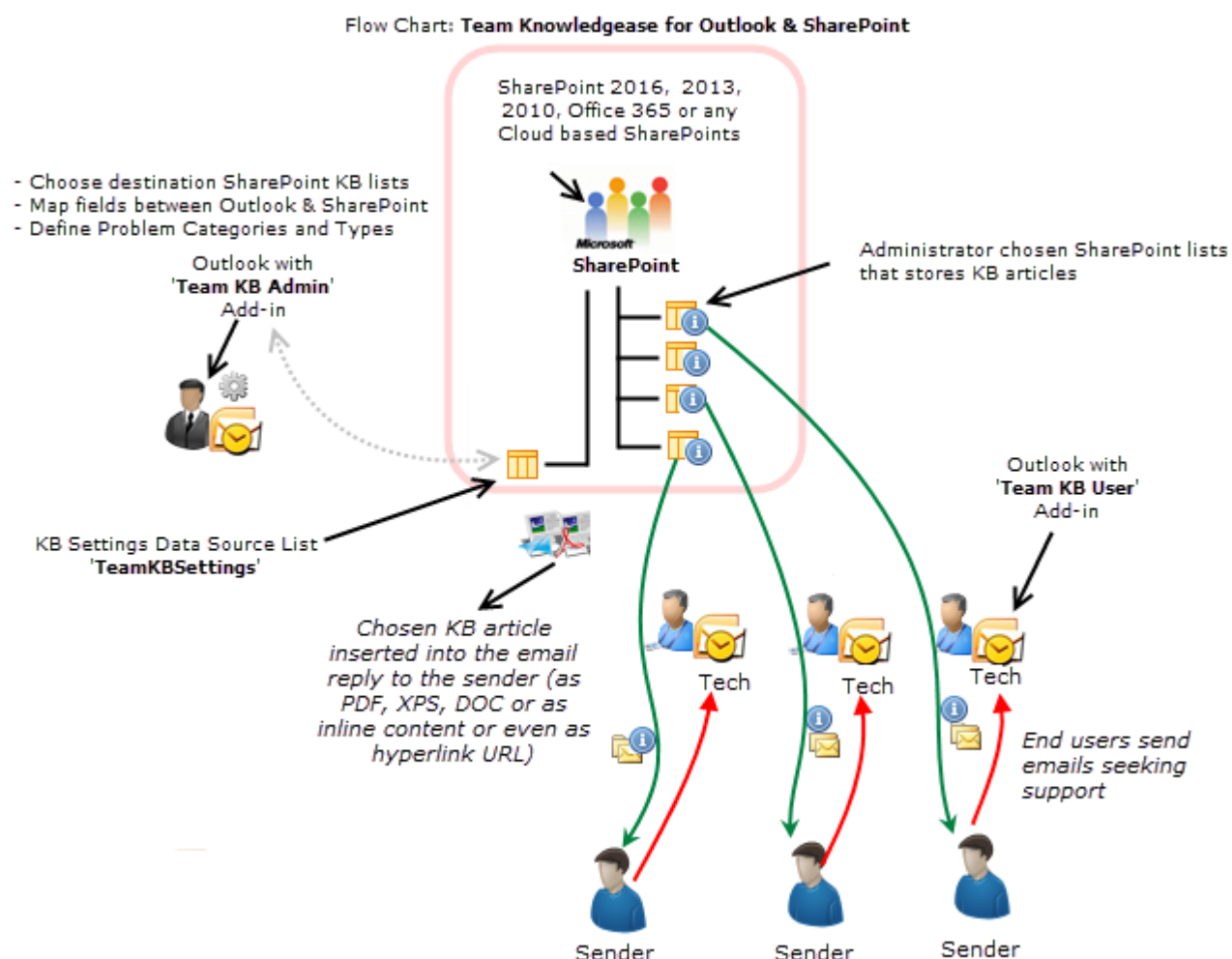


Purpose of this add-in

You and your support team frequently find trying to solve the same issue over and over. 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 SharePoint lists 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 the SharePoint lists 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 SharePoint site to the email reply, in a crude fashion. In the midst of this, the formatting, inline images and other attachments of the particular KB article do not make it to the email. After putting much effort and time, you still didn't get the complete KB article inserted into the email reply. Moreover, the frequent switching back and forth between the email client and SharePoint site tends to loosen the focus of the support staff, leaving him/her frustrated. Evidently, organizations and teams that leverage SharePoint as knowledge base would need to reinvent the wheel and implement an efficient way of importing SharePoint based article or document, to outgoing email reply.

Team Knowledge Base is designed to bridge this gap between your email client such as Outlook and your SharePoint lists where all your knowledge base articles are stored, such that you can effortlessly locate a KB article (stored on SharePoint) 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 and SharePoint, no more copy-paste job etc.





3. How does it work?

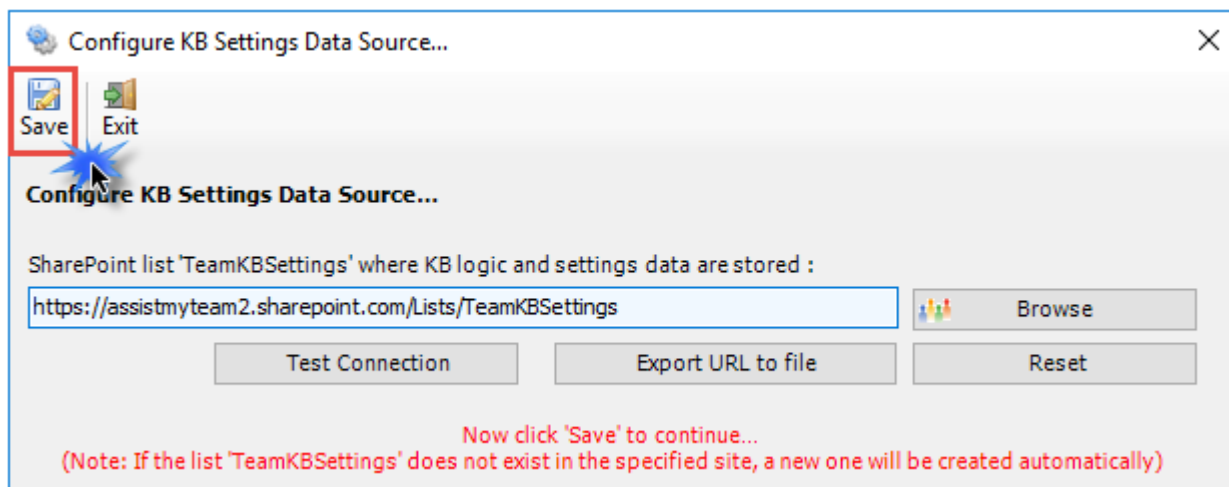
Team Knowledgebase is an enterprise-wide knowledge base, allowing you and your team to share information, reduce customer support, improve staff productivity and eliminate time wasted searching for information across disparate systems such as shared folders and paper documents, all inside Outlook. It consists of two portions – **Admin** and **User** install.

- the Admin install is for managers and administrators, who would perform the global configuration of the knowledge base, choose and setup SharePoint KB lists, and map fields between Outlook and SharePoint.
- the User install is for individual staff that will be making use of the KB articles stored in one or more of the Administrator chosen SharePoint lists, from Outlook.

NOTE: User install is a subset of Admin Install, and hence, if you have installed the admin tool, you need not install the User tool.

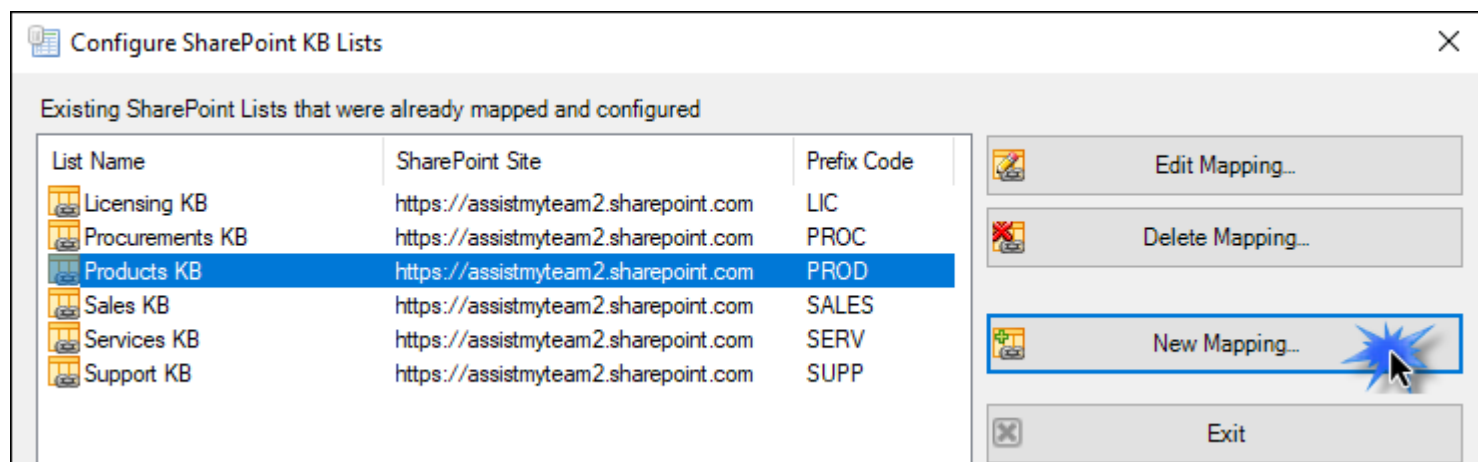
Step 1: Administrator configures SharePoint KB lists and performs mappings

The first step is for the administrator to choose a SharePoint site, under which a new list '**TeamKBSettings**' would be created, to store the KB metadata, mappings and other configuration data. This special list will act as a central KB settings data source, so that support staffs scattered in different geographical locations can still access the mappings and other administrative defined configurations by all members of the support staffs.



Why store the KB settings data in a special SharePoint list? Because your team members can be scattered in different geographical locations and might not have access to the company's local network remotely, hence using a network database or shared folder won't be feasible. Instead, in Team Knowledgebase, the KB configuration and settings data are stored in a special SharePoint list (having the name '**TeamKBSettings**') accessible to all staffs, on the local network, WAN or via the WWW.

Choosing SharePoint KB Lists and Mappings - Before you and other staffs can start searching and choosing KB articles from SharePoint and insert to outgoing email replies in Outlook, the KB Administrator needs to choose destination SharePoint lists where the KB articles will be collected and shared.





It is followed by fields mapping between the Outlook mail and SharePoint list. 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.

	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

Each KB article can also be tagged with a **Category** and **Type**. Typically, administrator will gather all the problem areas that the support team will be attending to and feed them into the categories list. Further each category can have their own list of types. So, what you have will be nested tiers of categories/types which are complete representation of your organization's support model and act as somewhat of a guiding decision tree for publishing and searching KB articles.

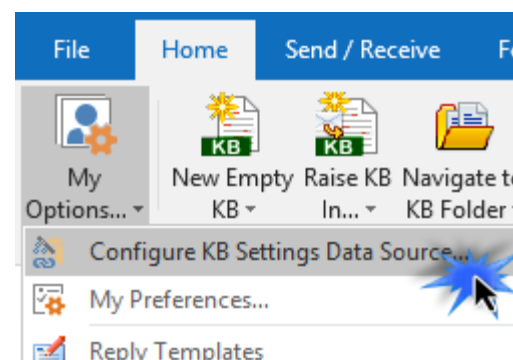
Step 2: Team members install Team KB User tool

To be able to access and make use of the KB articles stored in SharePoint from Outlook, every team member must install the Team Knowledgebase User tool (*TeamKBUserSPSetup.exe*) in their system.

Once installed, the user will be prompted to specify the KB Settings Data Source, which is nothing, but a special SharePoint list having the title '**TeamKBSettings**', which was configured previously by your administrator.

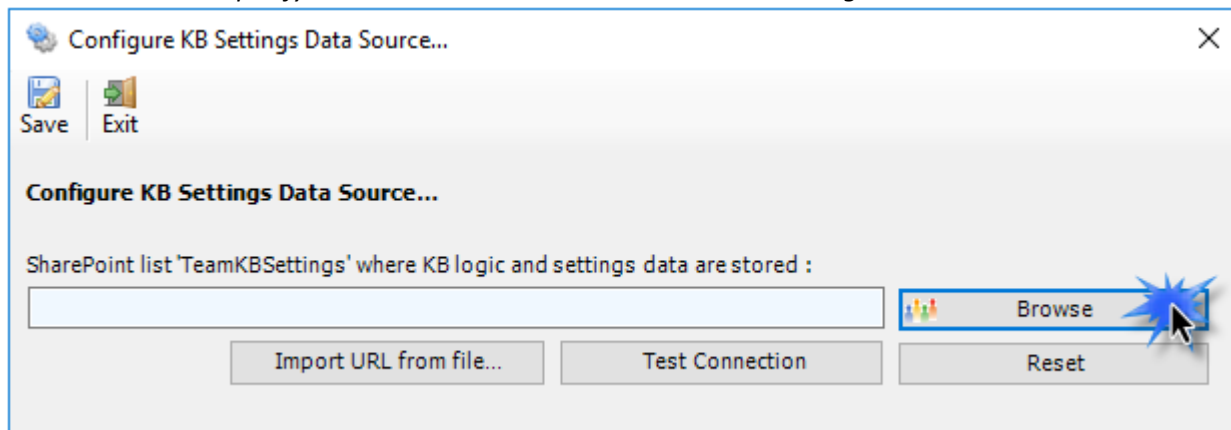
The data source stores the drop-down lists of categories, types, email templates, notification and other common settings. In short, these are global settings that streamline the behavior on how all users raise, access and use KB articles in their Outlook.

If the '**KB Settings Data Source**' panel does not show up, you can invoke from the **Outlook > Team KB toolbar > My Options** menu...

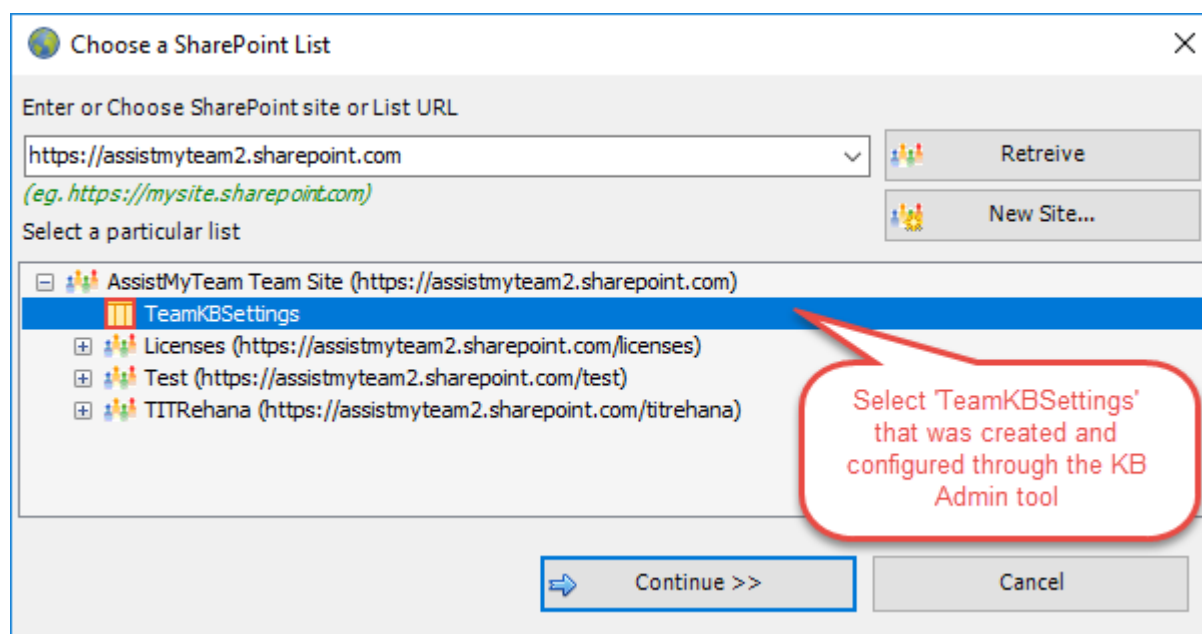




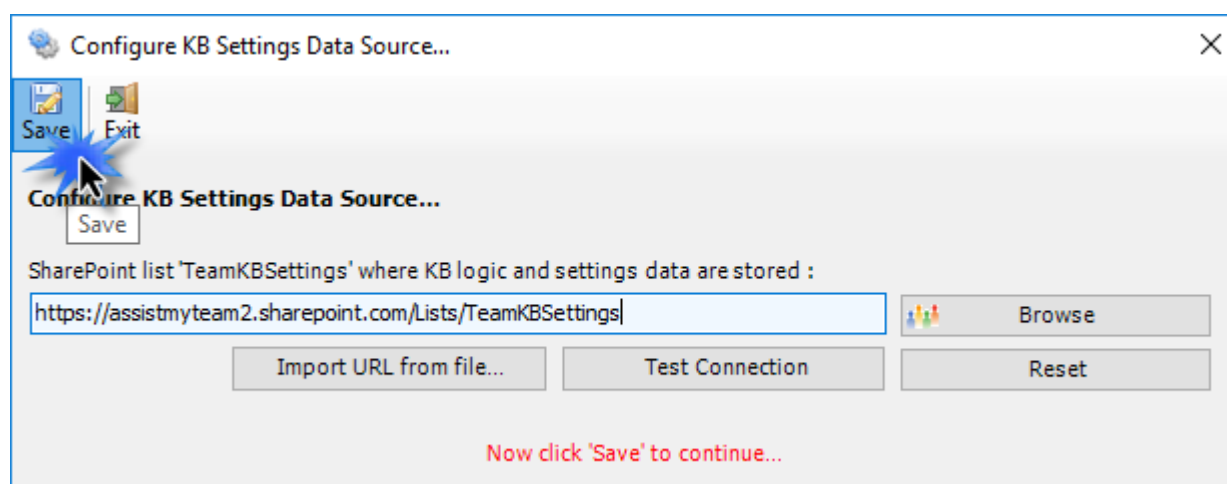
Click 'Browse...' to specify the SharePoint site where the 'TeamKBSettings' list is located



Enter the SharePoint URL site to show all available sub-sites and lists. If your administrator had already configured Team Knowledgebase, there would be a list '**TeamKBSettings**' that stores KB configurations including destination SharePoint lists and their corresponding mapping settings. Select that list to maintain a permanent link between the Team Knowledgebase User add-in and the KB data source.



Now, click the '**Save**' button, to confirm the selected KB Settings Data Source, such that Team Knowledgebase User add-in can connect to this list and retrieve the KB logic and settings data to the local system automatically.

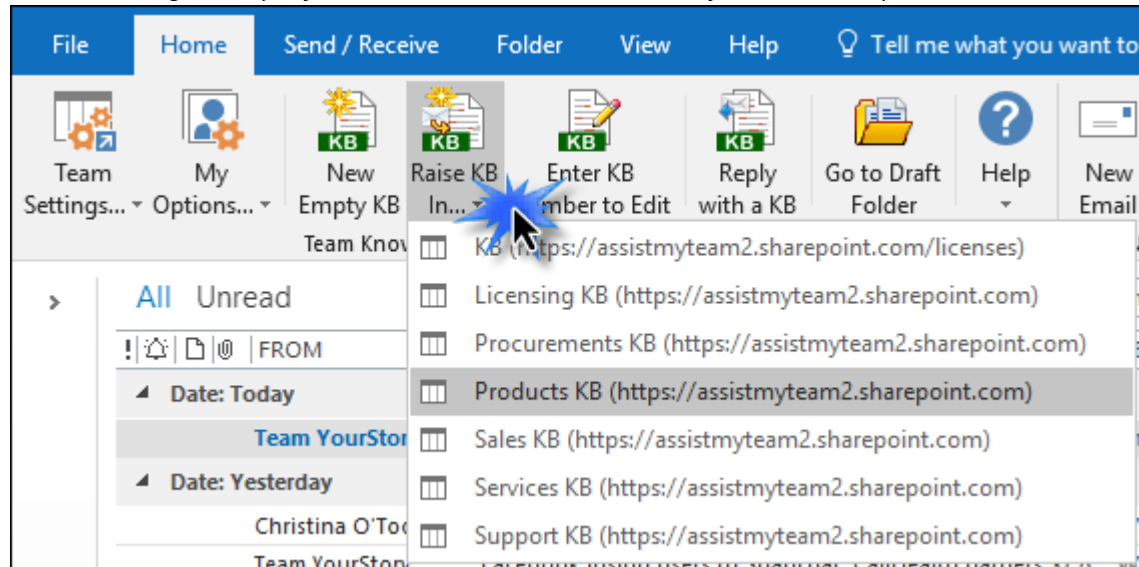




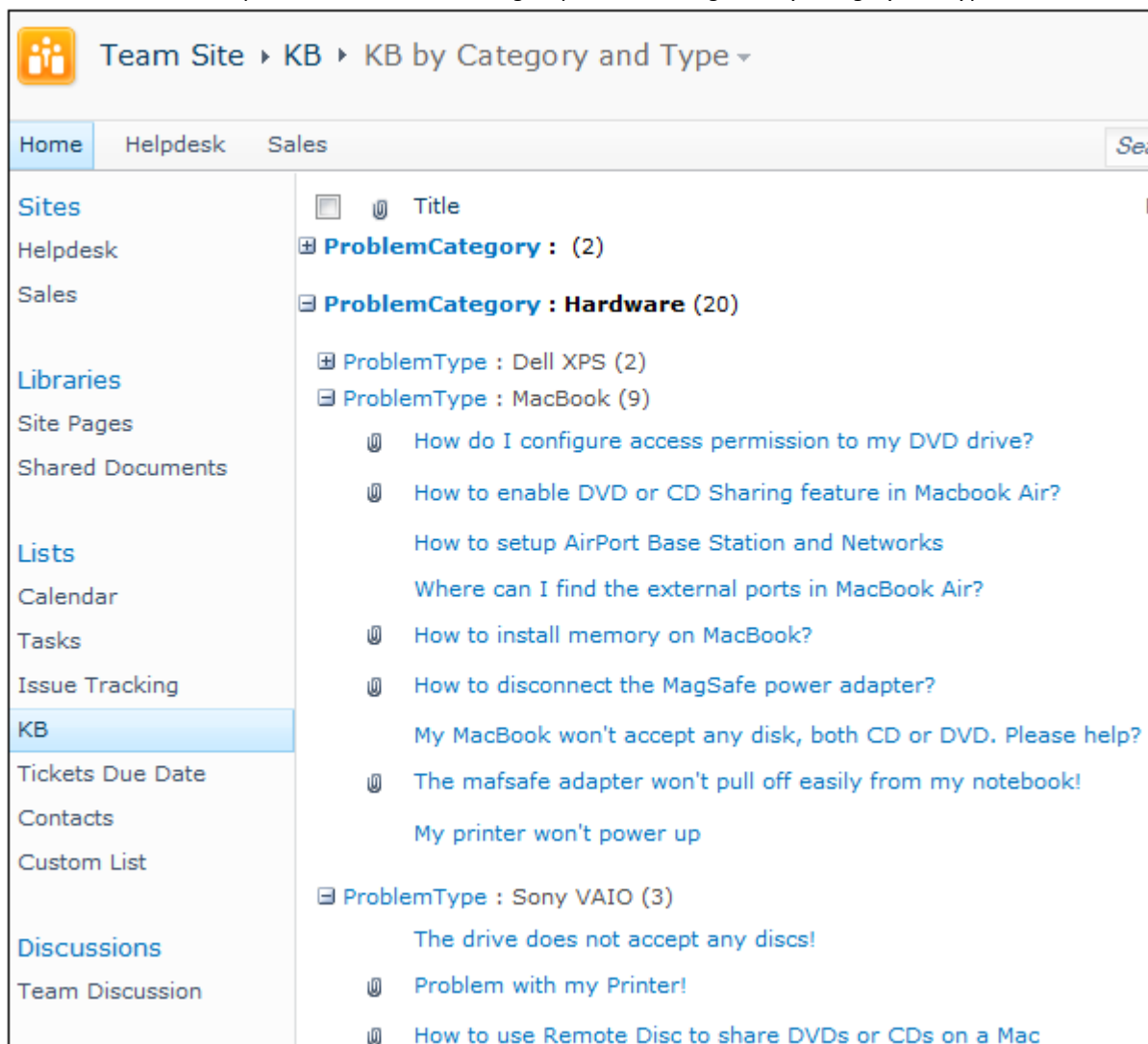
Step 3: Accessing KB articles from Outlook and inserting to email replies

Now, open Outlook and from the Team Knowledgebase toolbar, you will notice that the '**Raise KB in**' drop down menu shows all the administrator's chosen SharePoint Lists where the KB articles are stored. You and other users can then simply choose the destination KB SharePoint list to which a new KB will be generated from emails and more importantly, choose an existing KB article from one of the relevant KB SharePoint list to reply to an email in Outlook.

Team Knowledgebase specific ribbon available in the Home tab of the Outlook Explorer window:



KB articles, stored on a particular SharePoint list, grouped and arranged in by category and type:



A pop-up dialog box allows you to browse through the existing knowledge base articles and select the relevant article to be embedded either as attachment or inline content into the email reply.

The screenshot shows the Outlook ribbon with the 'Reply with a KB' button highlighted. A red callout bubble points to this button, stating: "Email from a customer seeking support to a frequently asked issue." Below the ribbon, an email is visible with the subject "Got a new battery for MacBook. Help required Urgent". A red arrow points from the 'Reply with a KB' button to a pop-up dialog box titled "Select a KB to reply to the email".

The dialog box contains the following elements:

- SharePoint Site/List: 3 SharePoint Lists Chosen
- Search KBs button
- Enter Keywords: Optional
- Select an item to insert:
 - Products KB - <https://assistmyteam2.sharepoint.com> (10)
 - Hardware (5)
 - CPU (3)
 - [KB 2] Where can I find the external ports in MacBook Air?
 - [KB 4] MacBook Pro: How to remove or install the battery (highlighted with a yellow star)
 - [KB 6] iPod won't turn on!
 - Keyboard (1)
 - Mouse (1)
 - Software (5)
 - Office 2016 (3)
 - [KB 1] How to use Remote Disc to share DVDs or CDs on a Mac
 - [KB 7] Useful keyboard and trackpad tips and shortcuts
 - [KB 9] How to install applications using the MacBook Air SuperDrive
 - Word (2)
 - Services KB - <https://assistmyteam2.sharepoint.com> (2)
 - Support KB - <https://assistmyteam2.sharepoint.com> (3)
 - Cars (3)
 - Audi (1)
 - [KB 3] [125] Mac OS X 10.5: Can receive email, but not send email
 - BMW (2)
 - [KB 1] [122] Troubleshooting the MacBook Air SuperDrive
 - [KB 2] [123] MacBook Pro: How to remove or install the battery
- Insert selected KB as:
 - Word DOC
 - Adobe PDF (selected)
 - Single File MHT
 - Microsoft XPS
 - Inline HTML
 - Hyperlink (URL)
- Attachment Naming:
 - Article ID (selected)
 - KB subject
 - Both
- Buttons: Insert, Cancel
- Checkbox: Send reply directly

A red callout bubble points to the 'Insert' button, stating: "Choose a KB and click 'Insert' to attach or embed the KB content to a new email reply".

You can insert selected KB article in 3 ways to outgoing email:

1. Inserting chosen KB article as **PDF or XPS file attachment** to the email reply
2. Inserting chosen KB article as **inline content** to the email reply
3. Inserting chosen KB article as **hyperlink URL** into the email reply



4. Requirements

Team Knowledgebase for Outlook & SharePoint is available right inside your Outlook and can be easily deployed through an installer across the entire organization.

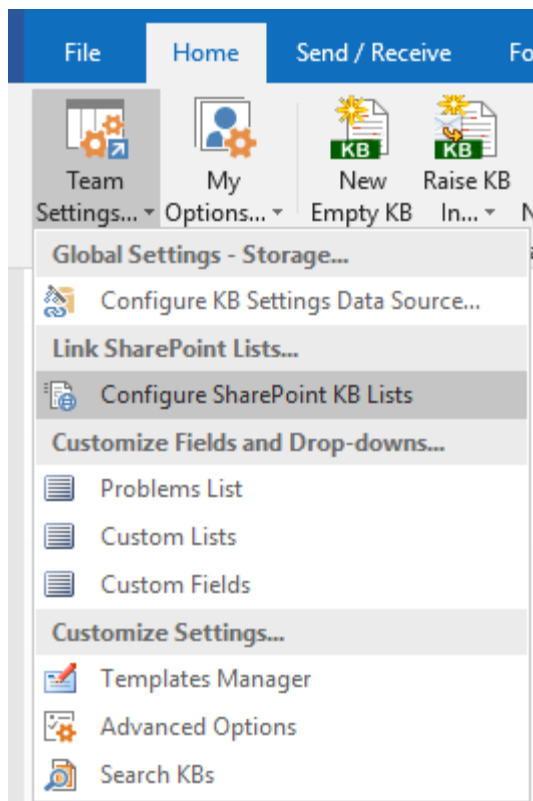
Windows Version	Windows 10, Windows 8, Windows 7, Windows Vista (32 bit or 64 bit) and all server-based Windows 2008 R2 and above. Windows XP is not supported.
Outlook Version	Microsoft Outlook 2007, 2010, 2013, 2016 (both 32-bit and 64-bit are supported). Earlier versions such as Outlook 2000, XP should work, but they are not actively supported. The application operates directly inside the Microsoft Outlook. Outlook Express is not supported.
SharePoint	SharePoint 2010 or Higher. Cloud-based SharePoint such as Office 365 are also supported.
Others	Microsoft .NET Framework 4.6



5. Centralized Administrative Settings

The Team Knowledgebase Admin add-in tool provides a dedicated menu in the toolbar that allows administrator to customize the contents of all problem categories/types drop-down boxes, Choose and configure SharePoint Lists where articles are stored, templates for KB notification, custom fields etc. These KB settings data and managerial configurations are stored on a dedicated SharePoint list ('TeamKBSettings'), accessible to all users of the organization.

The Team KB menu serves as the gateway for launching most of the functionalities and tools available. In Outlook 2016, you would find the Team KB Admin menu under in a dedicated button menu '**Team Settings**' under the toolbar as shown below.



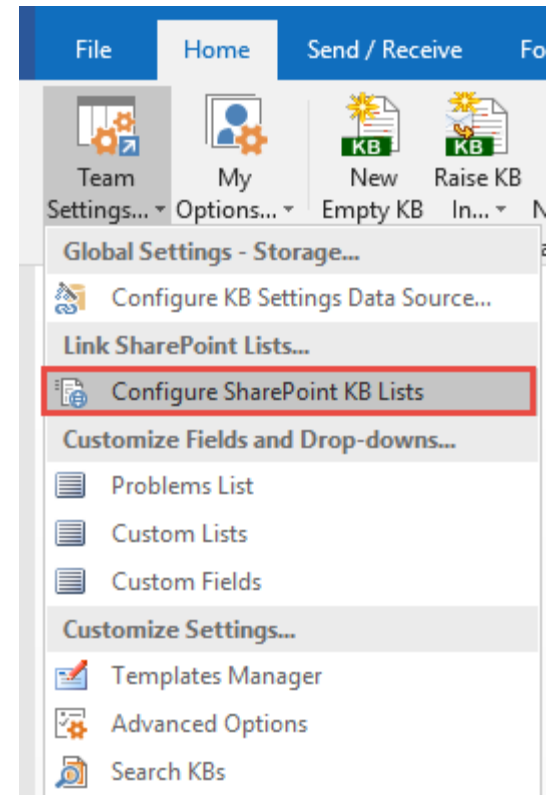
5.1 Configure KB Settings Data Source

Here, you will specify a SharePoint site where the admin add-in will create a new list 'TeamKBSettings' (if not already existed). And this will be used by the add-in to store the KB metadata such as Problem Categories/Types lists, notification options, fields mappings, email templates etc. as well as other global settings that streamline the behavior on how all members use and generate new KB articles in Outlook.

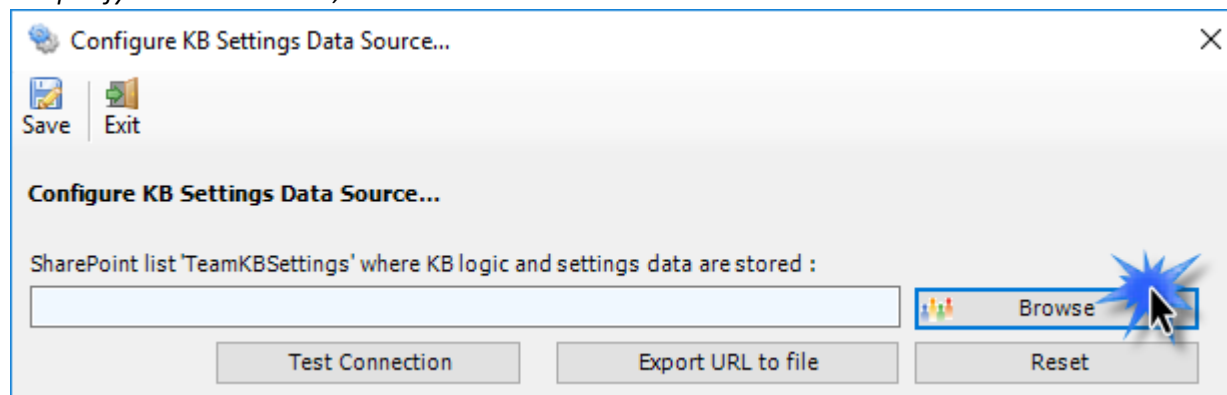
This special list will act as a central KB settings data source, so that support staffs scattered in different geographical locations can still access the mappings and other administrative defined configurations by all members of the support staffs.

Start Outlook and you would be automatically prompted with the 'KB Settings Data Source...' panel.

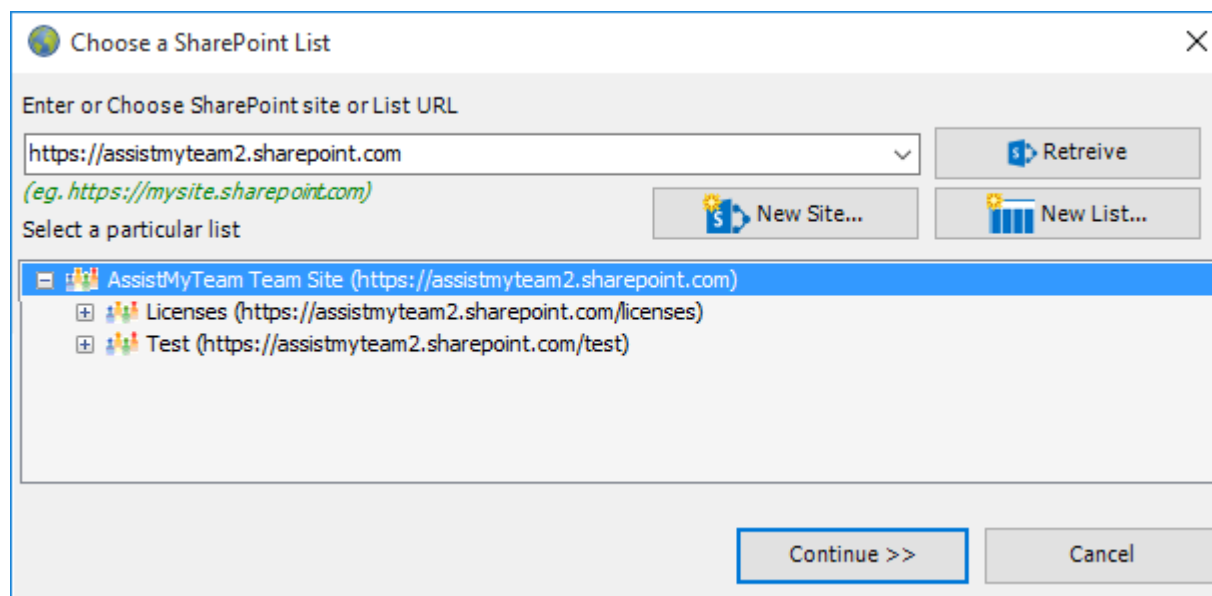
If it is not visible, you can invoke it from **Outlook > Team KB toolbar > Team Settings menu > Configure KB Settings Data Source...**



To specify a SharePoint site, click the 'Browse...' button.



This would allow you to enter the URL of the SharePoint. When entering the URL, always use the parent site URL in the format <http://mySharePointsite>. And click 'Retrieve' to show all available sub-sites and lists.



And then select the particular site under which the KB settings would be stored. You can also choose to create a new sub-site on the fly by clicking the 'New Site...' button and select it. When you click 'Continue', Team KB Add-in will automatically create and



configure a new SharePoint list titled '**TeamKBSettings**' under the site. And then any settings/drop down lists you defined from Team KB Admin add-in in Outlook would be saved in this repository.

Very Important! Your permission to the SharePoint site: *Make sure that you have 'Full Control' permission over the SharePoint site so that Team KB add-in can create the 'TeamKBSettings' list automatically.*

Why store the KB settings data in a special SharePoint list? Because your team members can be scattered in different geographical locations and might not have access to the company's local network remotely, hence using a network database or shared folder won't be feasible. Instead, in Team Knowledgebase, the KB configuration and settings data are stored in a special SharePoint list (having the name 'TeamKBSettings') accessible to all staffs, on the local network, WAN or via the WWW.

Login prompt dialog to SharePoint site - If the SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint. However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you (and other users) to enter their credential.

Check '**Remember**' so that Team KB add-in can use the same credential to logon to the SharePoint site in subsequent connection. You can also specify the authentication mode that is used by your SharePoint to allow connection to it. For instance, if your SharePoint is configured for Windows authentication, choose '**NTLM**'. If your SharePoint site is secured with ADFS, you can also specify the STS site URL under the ADFS server to get the authorization token.

If the site uses a form-based authentication, then choose '**Forms**' whereas if it uses a claimed based authentication (for Office 365 SharePoint Online), choose '**Office 365**'.

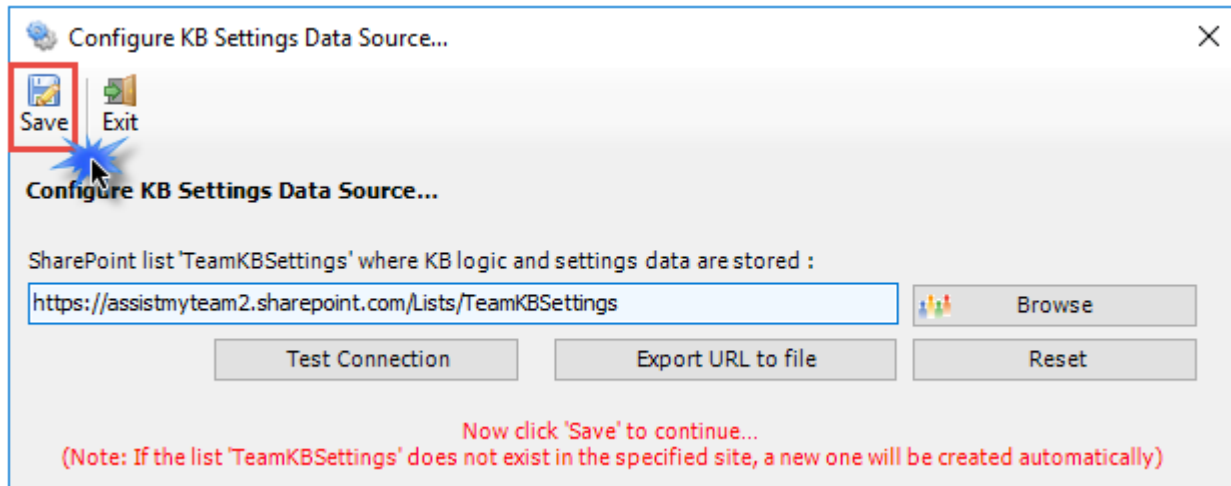
NOTE FOR OFFICE 365: If your SharePoint admin has set up 2-step verification or multi-factor authentication (MFA) on your Office 365 account, and you're trying to connect Team KB add-in to your SharePoint Online site, you may get the following error message in the login dialog box of the add-in if you use your Office 365 account password.

The Sign-in name or password does not match one in the Microsoft account system.

Refer to this [KB article](#) on how to resolve it



Once you click '**Save**', this KB settings list will be automatically created in the chosen SharePoint site, when the manager configures the admin tool the first time. And then any settings/drop down lists you defined from Team KB Admin add-in in Outlook would be saved in this repository.



Make sure that you have provided the chosen SharePoint site URL (e.g. <http://company.sharepoint.com/> in the above example) to all users who have or will install the User tool, as when user starts Outlook, the Team KB add-in will prompt the user to specify the SharePoint site where the '**TeamKBSettings**' list is located. And only then the add-in would automatically connect to the admin specified SharePoint site to retrieve the KB logic and settings configuration to the local system.

What SharePoint permissions are required for KB Users?

All KB users should have at least '*Contribute*' permission the SharePoint list '**TeamKBSettings**' as well as to all other SharePoint lists that are chosen as the KB repositories.

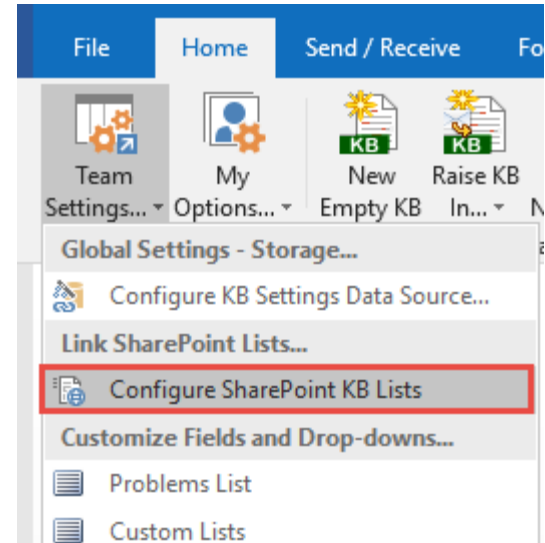
NOTE: You can use any SharePoint version starting with SharePoint 2010 to the latest SharePoint 2016. You can also use Office 365 SharePoint Online too.

5.2 Choose and configure KB SharePoint Lists

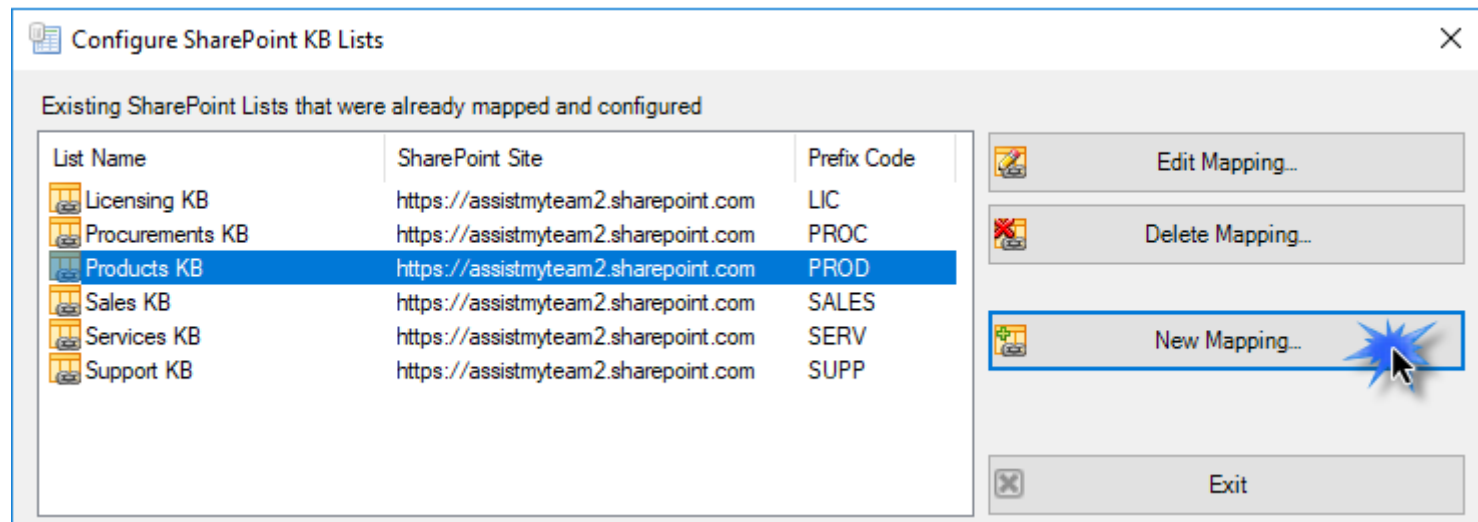
Before you and other users can start generating KB articles from Outlook to SharePoint or using them in Outlook from SharePoint, the manager needs to choose the destination SharePoint lists that store the KB articles and link them up with Team KB Admin Add-in.

Once linked, you and other users 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.

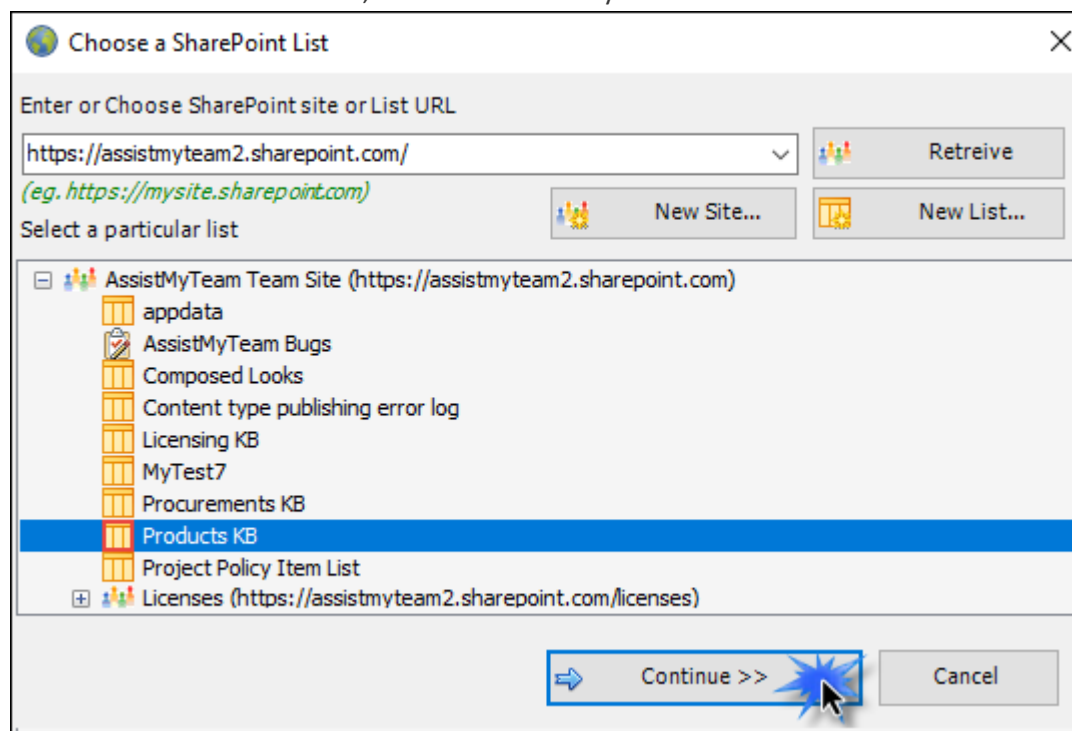
To choose and configure a new KB SharePoint list, go to **Team Settings menu > 'Configure SharePoint KB Lists'**.



Here is a listing of all SharePoint lists containing KB articles that are linked and configured. These chosen SharePoint lists would be deployed to all users in their Outlook (i.e., individual user would be able to generate a KB from an email to one of these SharePoint list as well as use it from SharePoint to reply to emails in Outlook).

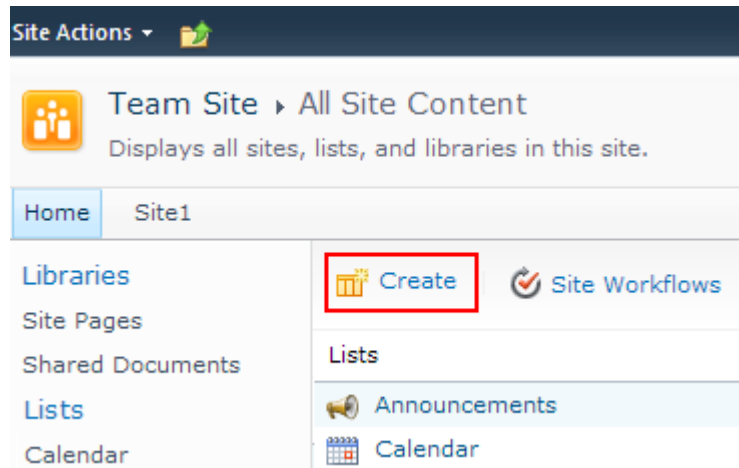


To configure a new SharePoint KB list and perform fields mapping, click **'New Mapping...'** button. You will then be prompted to enter the SharePoint site URL, and it would allow you to choose a SharePoint list.

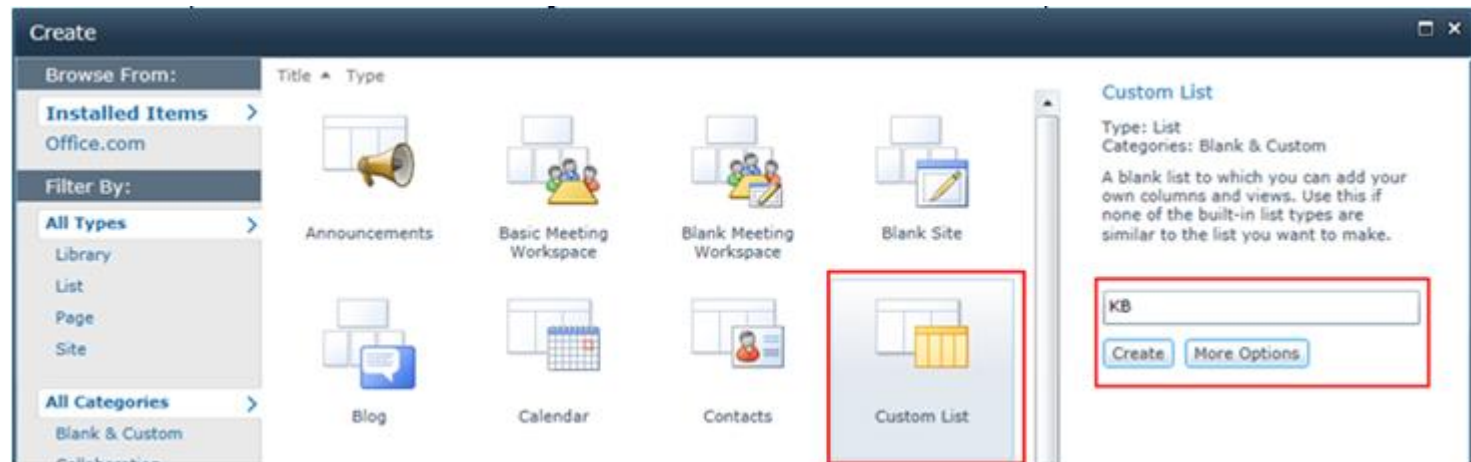




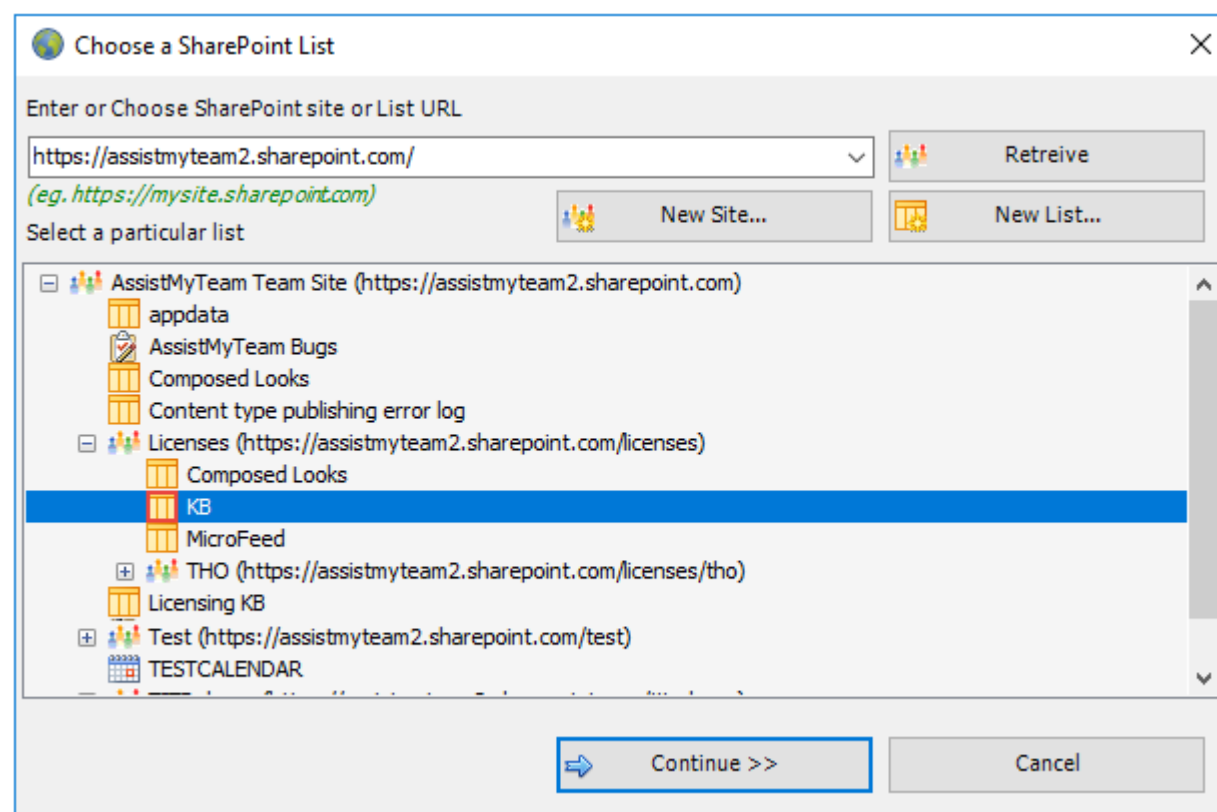
You can choose re-use existing SharePoint lists or create new one for this purpose. Ideally, we recommend that the SharePoint lists you will choose for used with Team KB add-in were derived from the inbuilt 'Custom List' template in your SharePoint.



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 Team KB add-in. By default, the site will be created as a blank site, unless a different site template is specified.

- 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.

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.

Fields Mapping

SharePoint List
<https://assistmyteam2.sharepoint.com/Lists/Products KB> Specify URL... Clear

Unique Tracking Prefix Code
 PROD Please provide a unique code of 5 or less characters

Map fields between Outlook mail to SharePoint list

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

Save Cancel

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.

Choose Outlook Fields...

Choose KB fields for which corresponding new SharePoint fields would be created

☐ Subject
☐ Problem Category
☐ Problem Type
☐ Not Ready For Use
☐ States
☐ BankDOB
☐ BankHQ
☐ BankID
☐ BankInfo
☐ BankName
☐ BankPrice
☐ Solution

Confirm

Cancel

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.

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

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.

Field Name

Specify a unique name for the new field!

OK

Cancel

Category

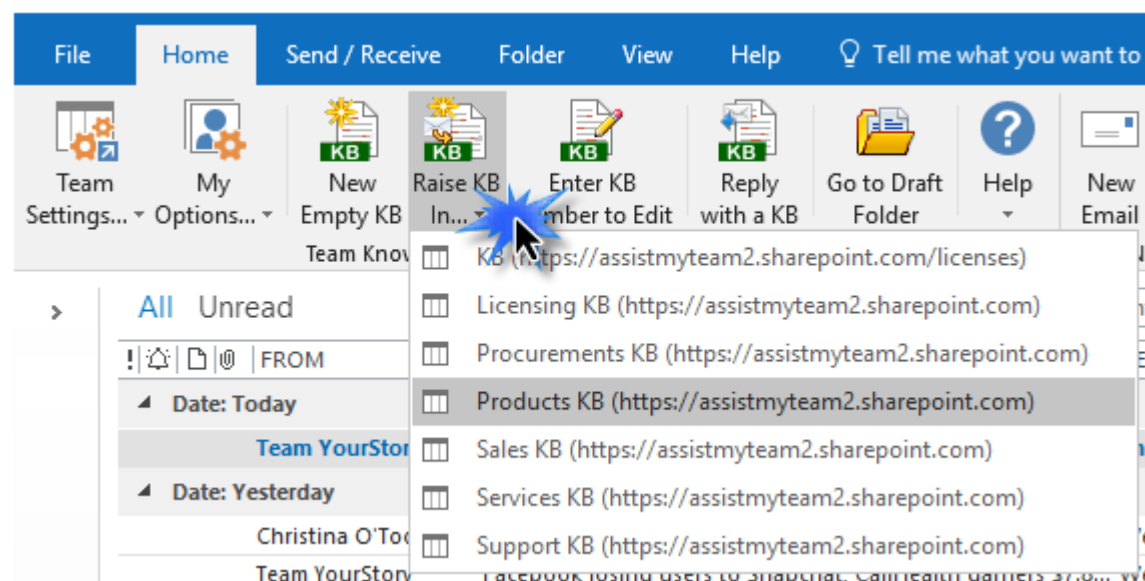


The new SharePoint field will have the same data type as that of the corresponding Outlook field.

	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 > Team 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 Team 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.



Through the Team KB Admin console, you can define, map and link any number of SharePoint lists from multiple sites so that, your users 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.

5.3 Problems List

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

The screenshot shows a window titled 'Problems List' with a toolbar containing 'Apply', 'Save', 'Exit', and 'Reset Columns Size'. Below the toolbar are two tables:

Problem Categories		Problem Types	
	Category		Problem Types
1	Cars	1	Audi
2	Countries	2	BMW
3	Hardware	3	CPU
4	Services	4	Intel
5	Software	5	Keyboard
6		6	Mac
7		7	Mercedes
8		8	Mouse
9		9	Office 2016
10		10	Outlook
11		11	SharePoint
12		12	UAE
13		13	UK
14		14	USA

- 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.

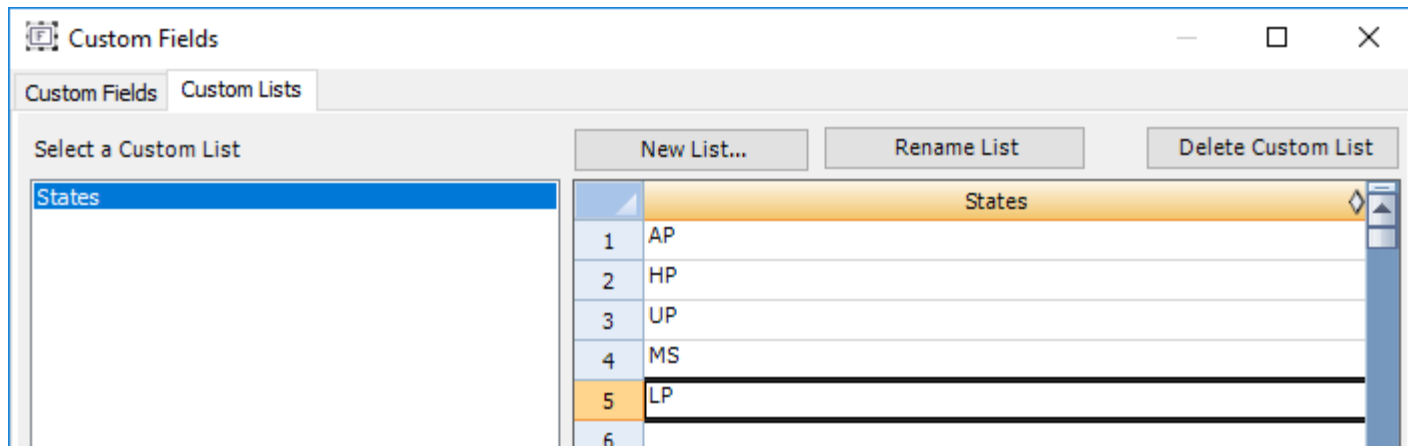
In the knowledge base form, when you select a problem category from the drop-down field, it will load this tier of problem type lists in the type drop-down box, corresponding to the selected category. These nested tiers of categories/types are complete customizable to your organization's support model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

The screenshot shows a form for 'KB Article #100010'. The form includes the following fields and buttons:

- ID: 100010
- Created: 3/4/2018 1:31:03 PM
- Modified: 3/4/2018 8:01:35 PM
- Author: Bahrur Rahman
- Last Modified By: Bahrur Rahman
- Category: Hardware (dropdown menu)
- Type: Ipod (dropdown menu)
- ☐ Not Ready For Use
- Buttons: Edit Solution, New ID, Update KB, Delete KB, Exit
- Posted To: Hardware Troubleshooting
- Conversation: iPod Charging Issue
- Subject: iPod Charging Issue
- Terms of Support.pdf (142 KB)
- Make sure the Hold switch is off
- 1. Check to see if the Hold switch is located on the top or the bottom

5.4 Custom Lists

Administrator can add new fields in the KB form in Outlook that takes a custom list to help describe the KB article more meaningfully. The list of entries you defined for each field will be available in the drop-down fields in the KB form, from which one of the possible entry can be chosen.

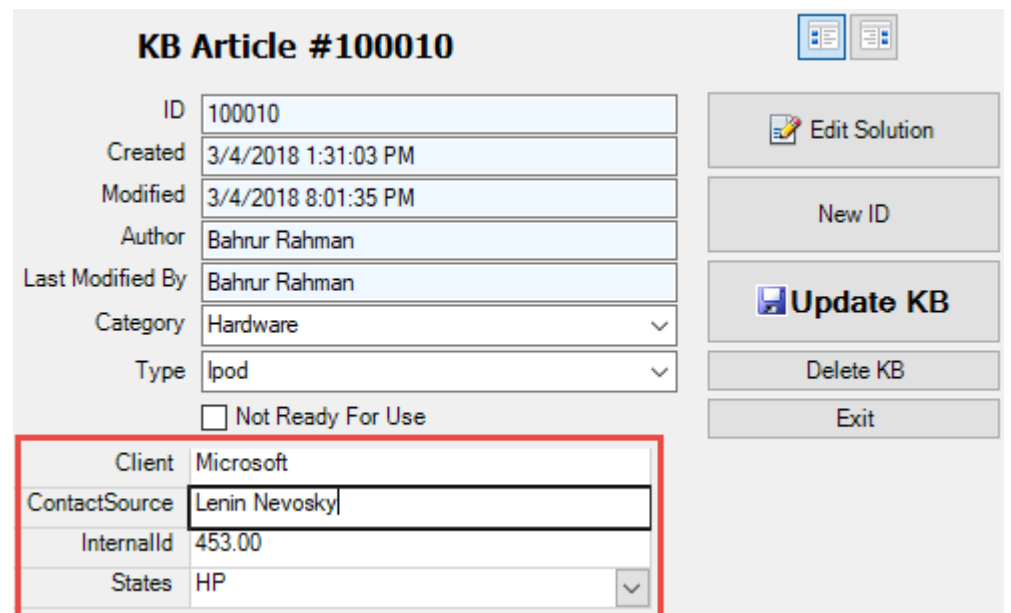


The screenshot shows the 'Custom Fields' dialog box with the 'Custom Lists' tab selected. On the left, under 'Select a Custom List', the 'States' list is highlighted. On the right, a table displays the items in the 'States' list:

	States
1	AP
2	HP
3	UP
4	MS
5	LP
6	

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.*

You can add any number of fields that take a drop-down list as required and they will all appear in the KB form in Outlook.



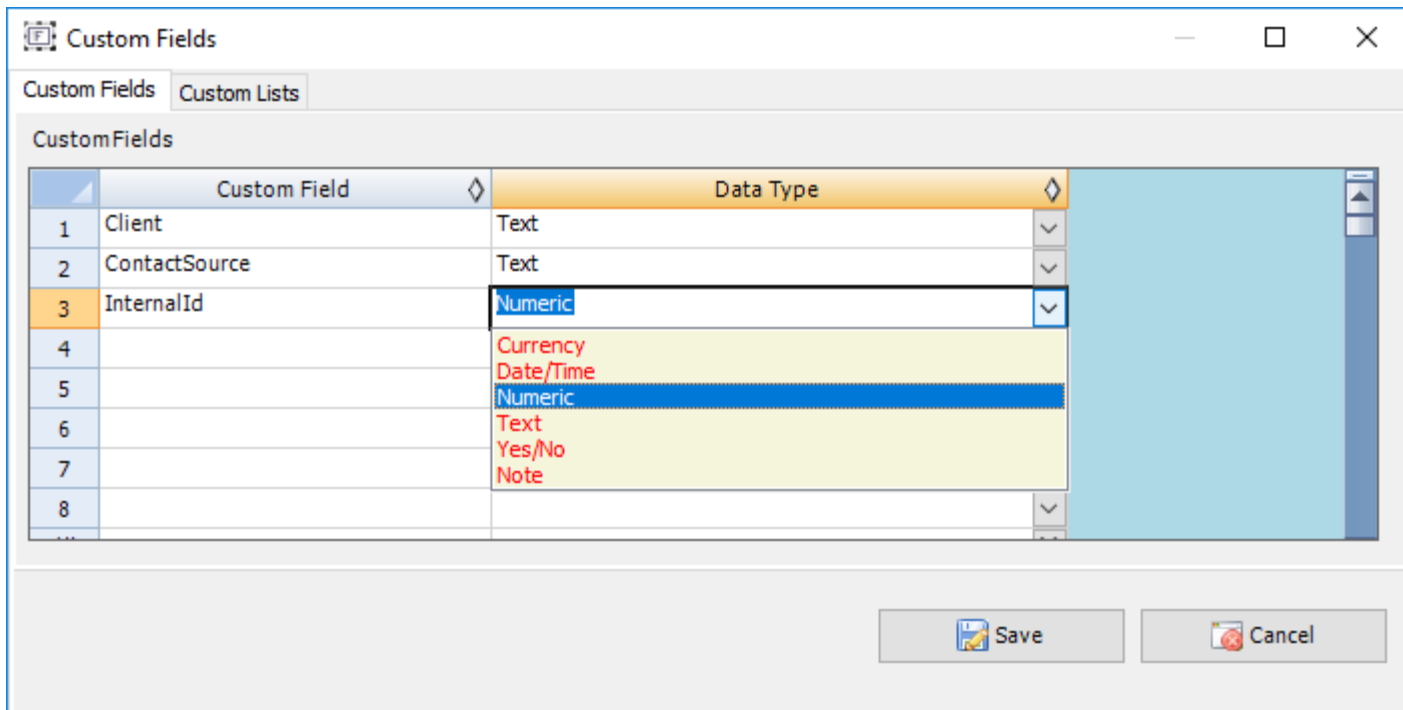
The screenshot shows the 'KB Article #100010' form. The form contains several fields for article metadata and a section for client information. The 'Client' section is highlighted with a red box:

ID	100010
Created	3/4/2018 1:31:03 PM
Modified	3/4/2018 8:01:35 PM
Author	Bahrur Rahman
Last Modified By	Bahrur Rahman
Category	Hardware
Type	Ipod
<input type="checkbox"/> Not Ready For Use	
Client	Microsoft
ContactSource	Lenin Nevosky
InternalId	453.00
States	HP

On the right side of the form, there are buttons for 'Edit Solution', 'New ID', 'Update KB', 'Delete KB', and 'Exit'.

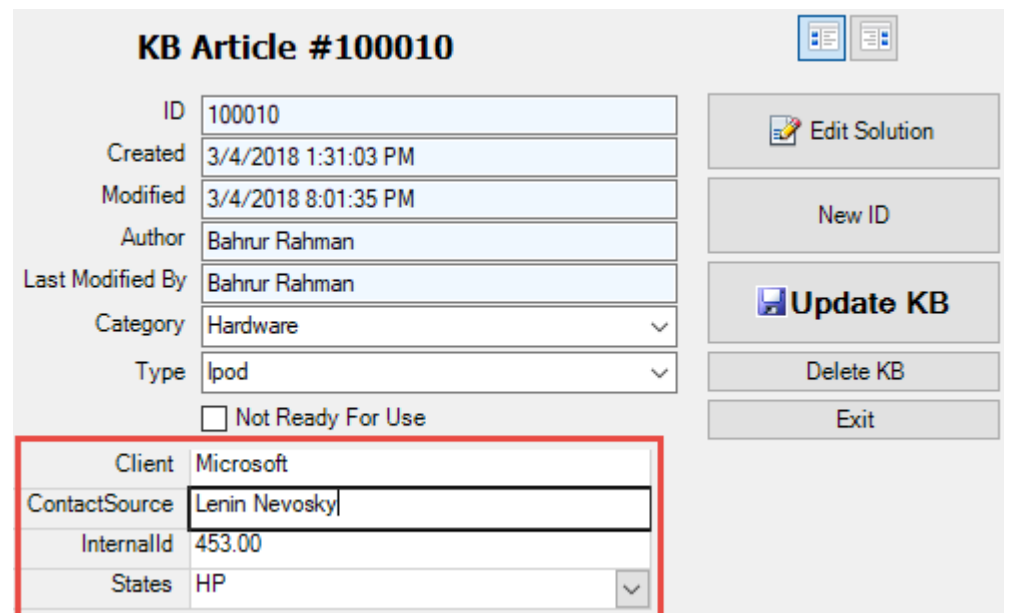
5.5 Custom Fields

Similar to fields that take a drop-down list, Administrator can add new custom fields in the KB form that take different data types such as *Currency*, *Date/Time*, *Numeric*, *Text*, *Yes/No*, *Note* etc. These new fields can help describe the KB article more meaningfully.



	Custom Field	Data Type
1	Client	Text
2	ContactSource	Text
3	InternalId	Numeric
4		Currency
5		Date/Time
6		Numeric
7		Text
8		Yes/No
9		Note

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



KB Article #100010

ID: 100010

Created: 3/4/2018 1:31:03 PM

Modified: 3/4/2018 8:01:35 PM

Author: Bahrur Rahman

Last Modified By: Bahrur Rahman

Category: Hardware

Type: Ipod

☐ Not Ready For Use

Client: Microsoft

ContactSource: Lenin Nevosky

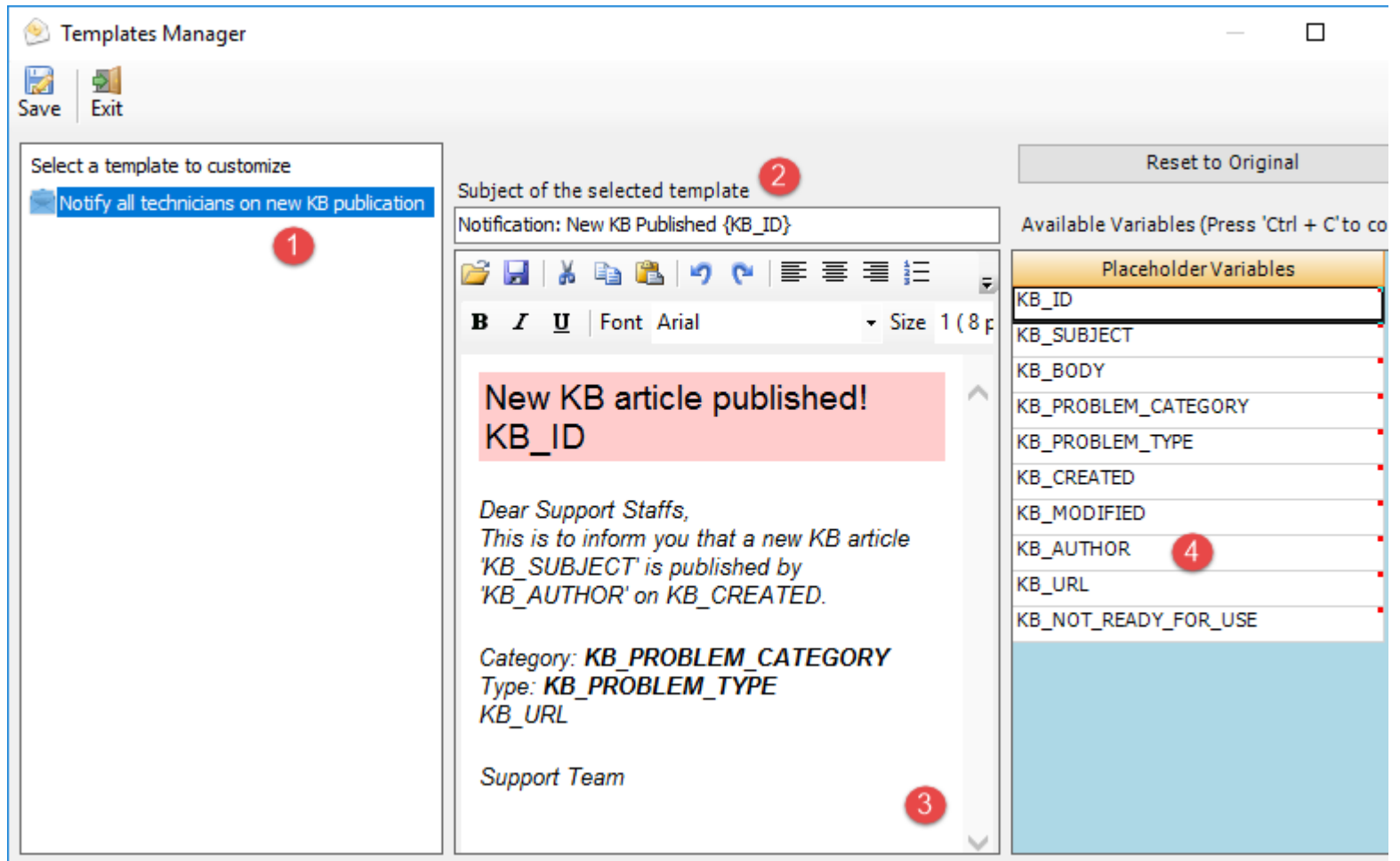
InternalId: 453.00

States: HP

Buttons: Edit Solution, New ID, Update KB, Delete KB, Exit

5.6 Templates Manager

With the Templates Manager, administrator 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.



5.7 Advanced Options

With the advanced options, administrators can control and streamline how all users with Team KB Add-in interact and use KB articles from the chosen KB SharePoint lists in their Outlook.

- 1 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 SharePoint list. 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 SharePoint list. 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 SharePoint list.
- 2 **Don't allow users to generate new KBs** – Enabling this option will disable the ability for the users to generate new KB articles from emails from their Outlook with their Team KB user add-in. That is, the 'New Empty KB' and 'Raise KB In' buttons will not be available to the non-admin users in the KB toolbar in their Outlook.
- 3 **Don't allow users to search KB lists** – If enabled, the 'Search KBs' tool under *Outlook > Team KB toolbar > My Options* menu will be unavailable to those staffs with the Team KB User add-in.
- 4 **Don't allow users to edit existing KBs** – Enabling this option will disable the ability for the users to make changes to any of the existing KB articles in the chosen KB SharePoint lists in Outlook. Only users with Team KB Admin Add-in will be able to make changes and save existing articles.
- 5 **Auto-update SharePoint lists** – if this is chosen, when the administrator add new values to the Problems and Custom fields drop-down lists, Team KB Admin add-in would automatically update all the problem fields of the chosen SharePoint lists and sync the new additions or changes in the drop-down lists back to the SharePoint. This way, the drop-down lists would be up to date in the SharePoint lists.

Prompt me for Confirmation – If this option is chosen, the administrator will be prompted for a confirmation, to update the drop-down lists of the Problem and custom fields of the chosen SharePoint lists, whenever, any changes or addition is done in Outlook.

Do Nothing – If this option is chosen, update to problem and custom fields of the SharePoint lists is not executed when the administrator makes changes to the global problem and custom lists in Outlook.




Team Settings...

KBs Article ID Logo Notifications Upgrade


Substitute the logo with your own 6

Specify an image file from your network share or from the web



Eg. \\Server\Image\logo.gif, or http://www.mycompany.com/images/logo.gif

Current Image 144 x 82






- 6 **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.

File	Discussion	Insert	Options	Format Text	Review
Delete	Post Reply	Reply	Forward	More	Quick Steps
Delete	Respond	Quick Steps	Move	Rules	Mark Unread
				Actions	Categorize
					Follow Up
					Tags
					Find
					Related
					Select
					Zoom

KB Folder

KB Article #1002

ID	<input type="text" value="1002"/>	 Edit Solution
Created	<input type="text" value="1/1/2016 11:24:49 PM"/>	<input type="button" value="New ID"/>
Modified	<input type="text" value="3/3/2018 10:05:28 PM"/>	 Update KB
Author	<input type="text"/>	<input type="button" value="Delete KB"/>
Last Modified By	<input type="text"/>	<input type="button" value="Exit"/>
Category	<input type="text" value="Cars"/>	
Type	<input type="text" value="Audi"/>	
<input type="checkbox"/> Not Ready For Use		

From	Posted On
Posted To	KB
Conversation	iPod won't turn
Subject	[KB-1002] iPod w

My iPod won't start & prolong operation. P help?

Resolution:

Make sure the Hold swi

1. Check to see if the is on. It's located c

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)



Team Settings...

KBs Article ID Logo Notifications Upgrade

☒ Notify the following stakeholders when a new KB is published 7 *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

Save Cancel

- 7 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 SharePoint lists.

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



Team Settings...

KBs Article ID Logo Notifications Upgrade

Choose an upgrade option for this tool on workstations

☒ None

☐ Auto-check new version from www.assistmyteam.com and offer to install if a new version is available **8**

☐ Controlled Upgrade - from an admin specified network folder share **9**

Specify the UNC network path where the VersionInfo.txt file is located

NOTE: This network path should be accessible by all members otherwise automatic upgrade may fail.

☐ Display a message to the member on new version availability **10**

- 8 Auto-check of new version from www.assistmyteam.com and offer to install if a new version is available**
Check this option to enable automatic check of new version of the Team KB add-in from the product website at www.assistmyteam.com during Outlook startup. If a new version is available, you will be prompted if you want to open the download page.
- 9 Controlled Upgrade – from an admin specified network folder**
Check this option to enable automatic upgrade of Team KB add-in from a network path, which is specified by the administrator. In the text box, specify the network shared folder where the Agent setup files (*TeamKBUserSPSetup_xXX.exe* and *VersionInfo.txt*) are placed. When new versions are available, all you need to do is download the latest version from the Team KB download page (www.assistmyteam.net/TeamKnowledgebaseSP/Download.asp), and then place the *TeamKBUserSPSetup_xXX.exe* and *VersionInfo.txt* into this network folder.
- 10 Display a message to the member on new version availability** - This would display a message about new version availability if one is found.

5.8 Search KBs

Team Knowledgebase supports a comprehensive search capability within Outlook with rich filter sets including full text search on KB articles stored in one or many SharePoint lists. Administrator can edit KB articles stored in SharePoint from the comfort of their Outlook as well as insert to replies without switching back and forth between Outlook and web browsers (where SharePoint site is opened).

Search KBs

Time Period: Any (1)
 Search By: None (2)
 Group by: Problem Category (3)
 SharePoint List: 5 SharePoint Lists Chosen (4) [Show] [Reset]

Buttons: Edit KB #2, Mark Not Ready 2, Delete, Export To PDF, Fields...

Subject (5)	KB ID (6)	Category (7)	Type (8)	Created (9)	Not Ready For Use (10)
Cars (5)					
MacBook Pro: How to install memory	SERV-1	Cars	BMW	2/15/2018 12:05:23 PM	
How to Use non-standard discs in optical drives	SERV-2	Cars	BMW	2/15/2018 12:05:38 PM	
[122] Troubleshooting the MacBook Air Supe...	SUPP-1	Cars	BMW	2/15/2018 12:06:21 PM	True
[123] MacBook Pro: How to remove or install...	SUPP-2	Cars	BMW	2/15/2018 12:06:30 PM	
[125] Mac OS X 10.5: Can receive email, but...	SUPP-3	Cars	Audi	2/15/2018 12:06:39 PM	True
Colors (5)					
How to Handle a Failed Crowdfunding Camp...	SUPP-4	Colors	Blue	3/6/2018 10:51:15 AM	
How to Handle a Failed Crowdfunding Camp...	SUPP-5	Colors	Blue	3/6/2018 10:53:47 AM	True
New Download: Email to PDF for Outlook	SUPP-6	Colors	Blue	3/6/2018 11:02:01 AM	
New Download: Issue Tracker for Outlook & ...	SUPP-7	Colors	Blue	3/6/2018 11:02:43 AM	True
Hardware (6)					
Where can I find the external ports in MacB...	PROD-2	Hardware	CPU	2/15/2018 12:01:23 PM	False
How to Use non-standard discs in optical drives	PROD-3	Hardware	Keyb...	2/15/2018 12:01:35 PM	False
MacBook Pro: How to remove or install the b...	PROD-4	Hardware	CPU	2/15/2018 12:01:50 PM	False
How to use Remote Disc to share DVDs or C...	PROD-5	Hardware	Mouse	2/15/2018 12:02:04 PM	False
iPod won't turn on!	PROD-6	Hardware	CPU	2/15/2018 12:02:15 PM	False
ONE OF ITS KIND ADAPTMET	PROD-11	Hardware	Keyb...	2/15/2018 10:33:56 AM	

Total: 22 | Ready For Use: 17 | Not Ready For Use (5)

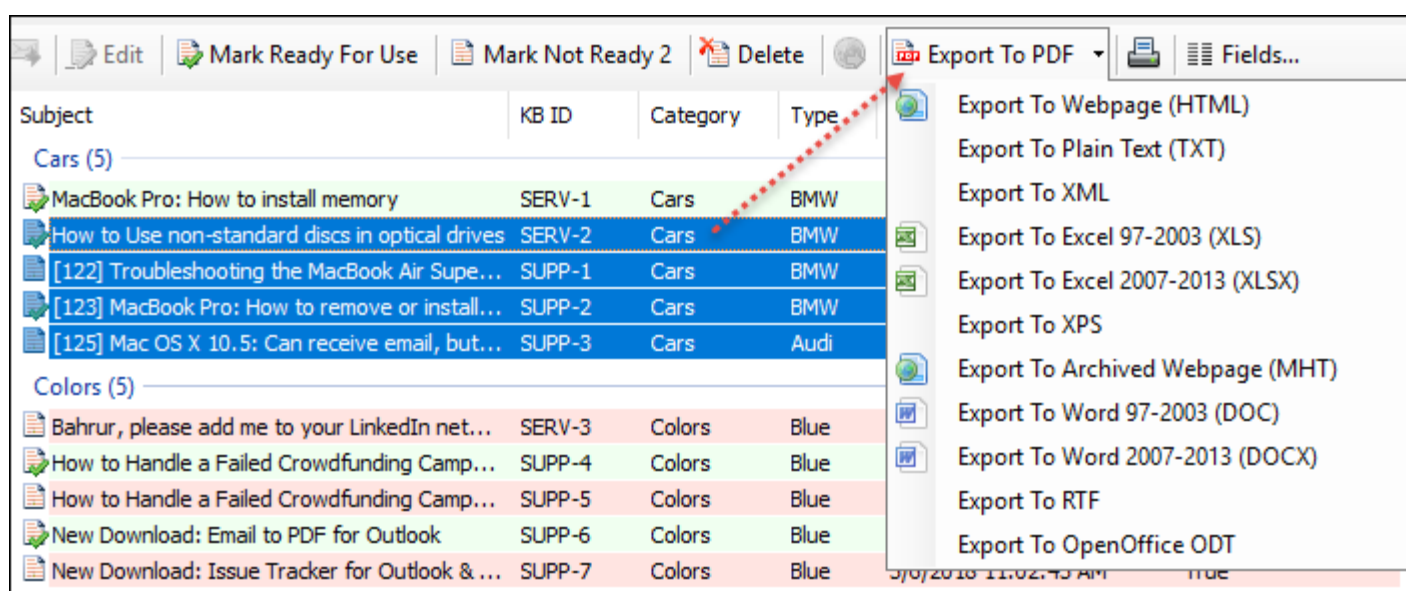
- 1 **Time Period:** Choose a time period from the followings under which the search will be confined: *Any, Today, Yesterday, Tomorrow, This week, Last Week, Next Week, This Month, Last Month, Next Month, This Year, Last Year, Date Range..., On*
- 2 **Search By:** Further refine the search by filtering through keywords or using one of the following: *Keywords, Problem Category, Custom List.*
- 3 **Group By:** You can choose to group the KB articles by: *SharePoint site/list, Problem Category, Problem Type or Author.*
- 4 **SharePoint Lists:** Choose one or multiple SharePoint lists on which to perform the search for matching KB articles.

SharePoint List: 5 SharePoint Lists Chosen

- ☐ KB (https://assistmyteam2.sharepoint.com/licenses)
- ☐ Licensing KB (https://assistmyteam2.sharepoint.com)
- ☒ Procurements KB (https://assistmyteam2.sharepoint.com)
- ☒ Products KB (https://assistmyteam2.sharepoint.com)
- ☒ Sales KB (https://assistmyteam2.sharepoint.com)
- ☒ Services KB (https://assistmyteam2.sharepoint.com)
- ☒ Support KB (https://assistmyteam2.sharepoint.com)



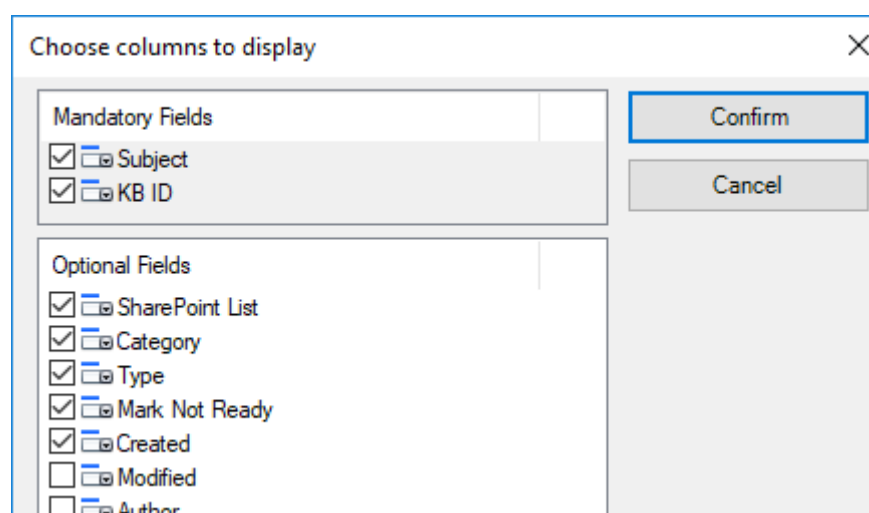
- 5 **Reply:** Insert the chosen KB article as file attachments or inline content to a new email.
- 6 **Edit:** Open the KB article in the KB form in Outlook for viewing or further editing.
- 7 **Mark Not Ready / Mark Ready:** If the selected KB article is not finished (i.e., in draft state, you can click this button to mark it not ready for use. Doing so, the particular KB article will now show up in the KB selection dialog box in Outlook for use. Similarly, if the chosen KB article is already marked not ready for use, when it is finished and ready for publishing, you can mark it 'Ready for use'.
- 8 **Delete:** Permanently remove the selected KB articles from the corresponding SharePoint lists.
- 9 **Show in web browser:** You can click this button to show the selected KB article in web browser.
- 10 **Export to PDF:** Click this to export the selected KB articles to PDF documents. You can also export to Word Documents, Excel sheets, HTML, plain text etc.



Multiple KB articles can be batch exported. Just select multiple KB items from the list and choose one of the document type to export to, and the batch wizard will perform the rest.

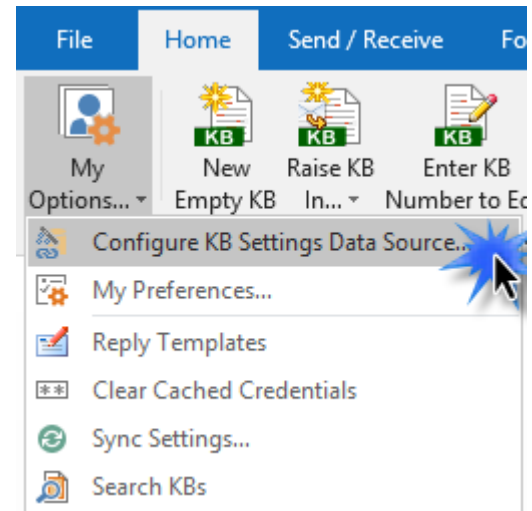
- 11 **Print:** Click this to print the selected KB articles. If you select a single KB to print, it will show you the print dialog option, where you can customize the layout, paper size etc. However, if you choose multiple KB articles, it will print directly using the default settings without displaying any 'Print' options.
- 12 **Columns to show in the result:** You are free to choose which particular KB fields/columns show up in the search result and report. Just click the 'Fields' button and choose the wanted columns to include.

The tool will remember your choice in subsequent runs. You can re-arrange the columns by drag-and-drop to get the kind of view you want. And the display order of the columns will be retained in subsequent sessions.



6. User Preferences and Options

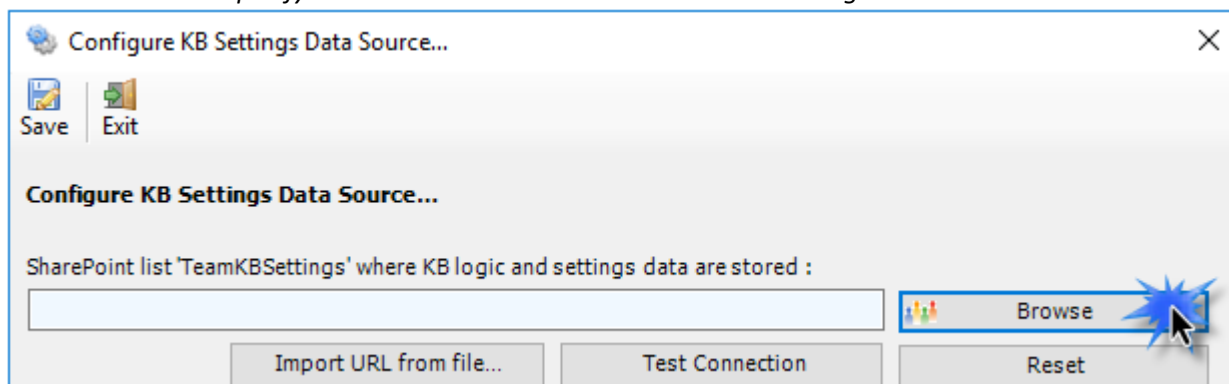
Each user who had installed the Team KB User add-in can customize how they utilize KB articles from their Outlook. User specific preferences are available under **'My Options'** button menu from the Team KB toolbar in Outlook.



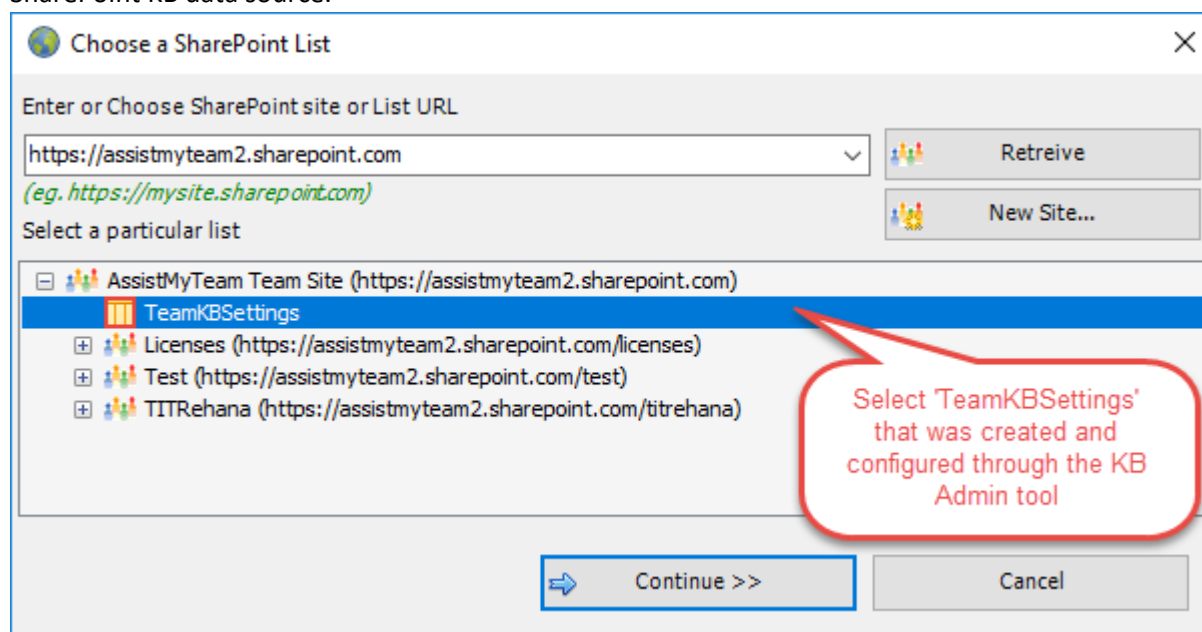
6.1 Configure KB Settings Data Source

The Settings data source is nothing but a dedicated SharePoint list with the name **'TeamKBSettings'** that was created and configured using the Team KB Admin add-in by your administrator under your SharePoint site. This SharePoint list stores drop-down lists such as categories and types, email templates, notification and other configurations. In short, these are global settings that streamline the behavior on how all users raise, access and use KB articles in their Outlook.

Click 'Browse...' to specify the SharePoint site where the 'TeamKBSettings' list is located.



Enter the SharePoint URL site to show all available sub-sites and lists. If your KB administrator had already configured Team KB System with the admin tool, there would be a list **'TeamKBSettings'** that stores KB configurations including destination SharePoint lists and their corresponding mapping settings. Select that list to maintain a permanent link between the User add-in and the SharePoint KB data source.





The SharePoint list chooser dialog box, where it shows all the available sub-sites and their lists displayed in hierarchical order.

Now, click the **'Save'** button, to confirm the connection. Team KB User add-in is now ready to access KB articles stored in your SharePoint lists from within Microsoft Outlook for the purpose of replying emails with the contents and attachments of a chosen KB article.

Login prompt dialog to SharePoint site - If the SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint. However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you (and other users) to enter their credential.

Check **'Remember'** so that Team KB add-in can use the same credential to logon to the SharePoint site in subsequent connection. You can also specify the authentication mode that is used by your SharePoint to allow connection to it. For instance, if your SharePoint is configured for Windows authentication, choose **'NTLM'**. If your SharePoint site is secured with ADFS, you can also specify the STS site URL under the ADFS server to get the authorization token.

If the site uses a form-based authentication, then choose **'Forms'** whereas if it uses a claimed based authentication (for Office 365 SharePoint Online), choose **'Office 365'**.



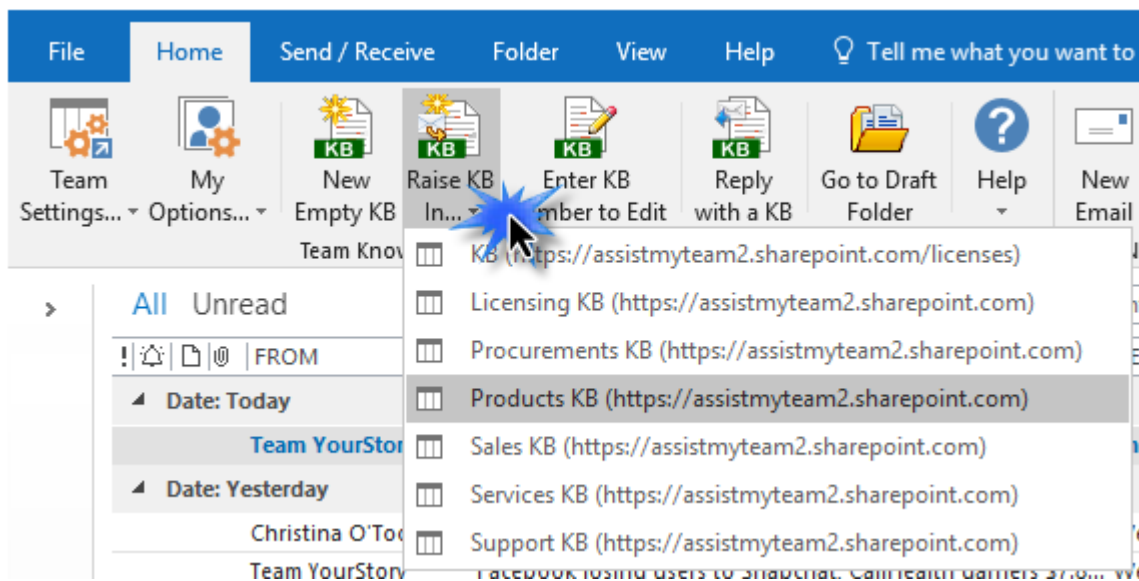
NOTE FOR OFFICE 365: If your SharePoint admin has set up 2-step verification or multi-factor authentication (MFA) on your Office 365 account, and you're trying to connect Team KB add-in to your SharePoint Online site, you may get the following error message in the login dialog box of the add-in if you use your Office 365 account password.

The Sign-in name or password does not match one in the Microsoft account system.
Refer to this [KB article](#) on how to resolve it

What SharePoint permissions are required for KB Users?

All KB users should have at least **'Contribute'** permission the SharePoint list **'TeamKBSettings'** as well as to all other SharePoint lists that are chosen as the KB repositories.

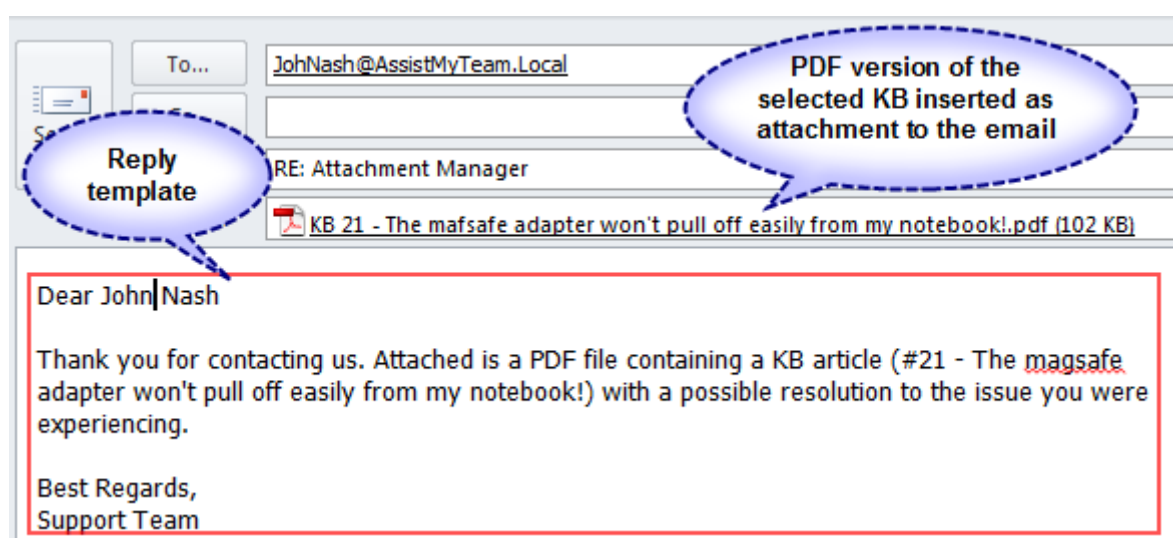
If your administrator has added and linked multiple SharePoint KB lists in Team KB add-in, you will notice that the **'Raise KB in'** drop down menu shows all of them. You can now simply choose the destination SharePoint list to which a new KB will be raised from the selected email in Outlook.



6.2 My Preferences

Team Knowledgebase Add-in also provides per user preferences for accessing and using KB articles in their Outlook.

- 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 > Team KB toolbar > My Options > Reply Templates*.

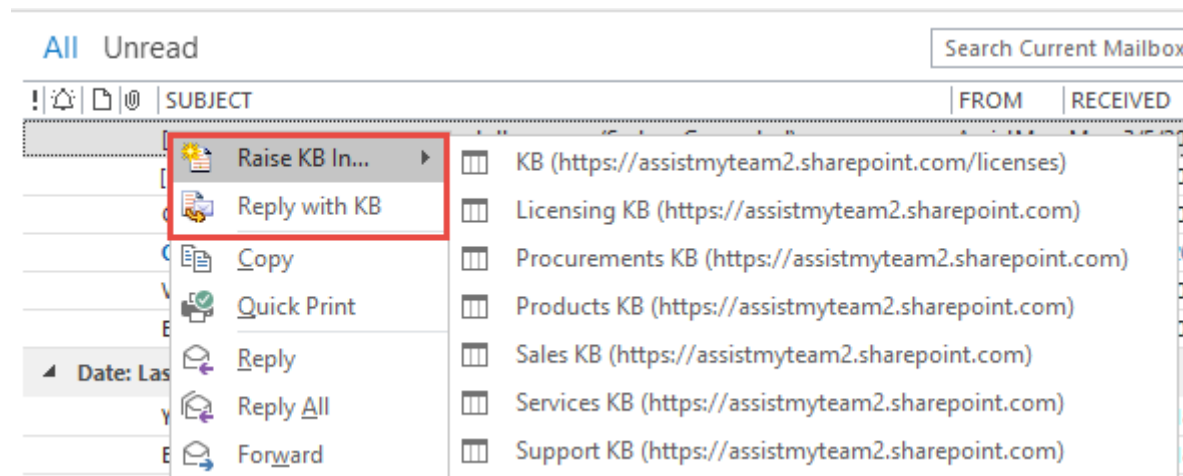


NOTE: If this is disabled, the add-in will only insert the chosen KB article as inline content or attachments and you will have to write your own reply.

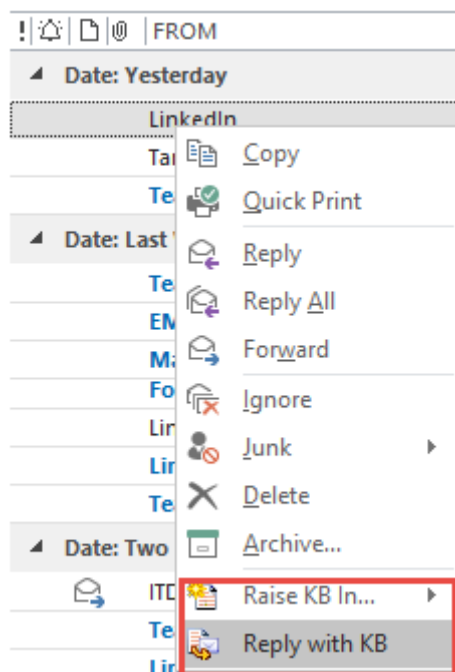
- 3 **Show KB Context menu on top** – Enable this option to set your preference for the placement of the KB context menu in topmost or bottom position.



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



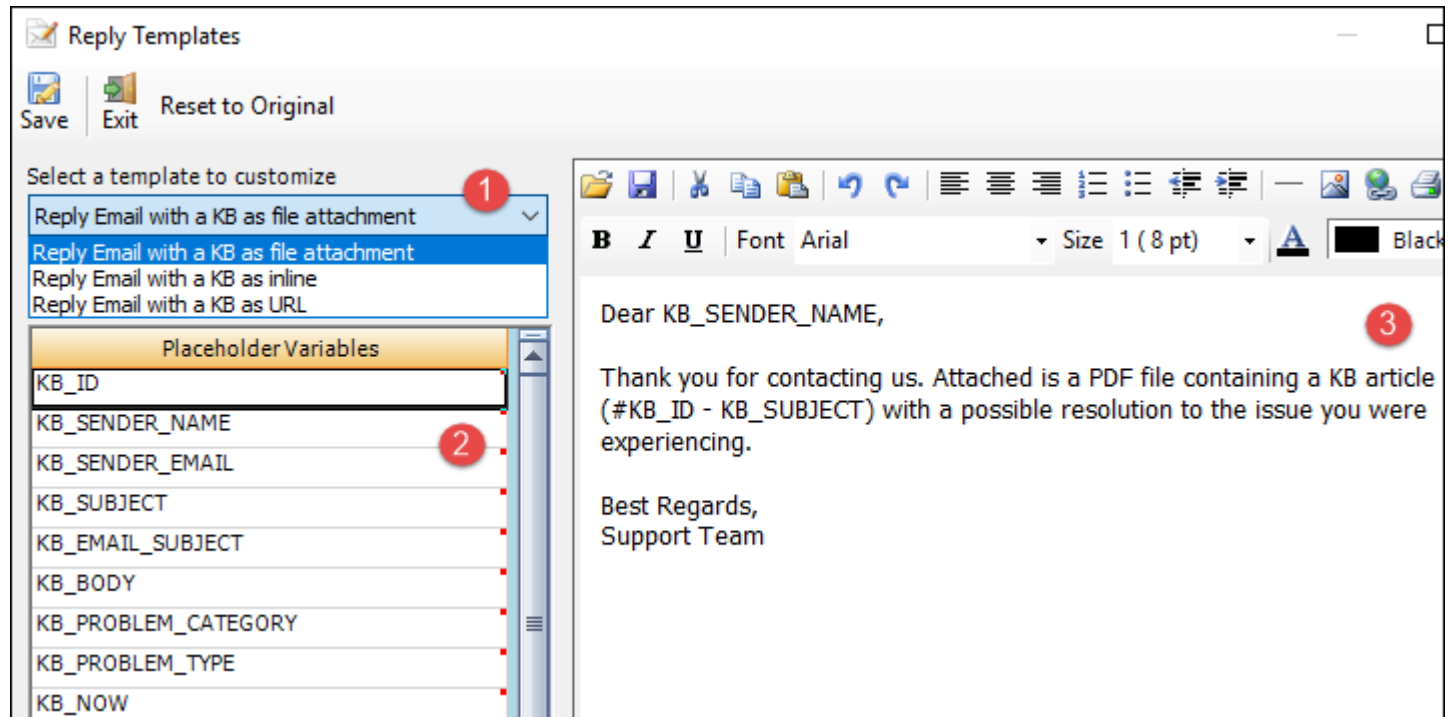
If the option is unchecked, the KB menu items appear at the lowest position in the context menu.



- 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 **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.

6.3 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.

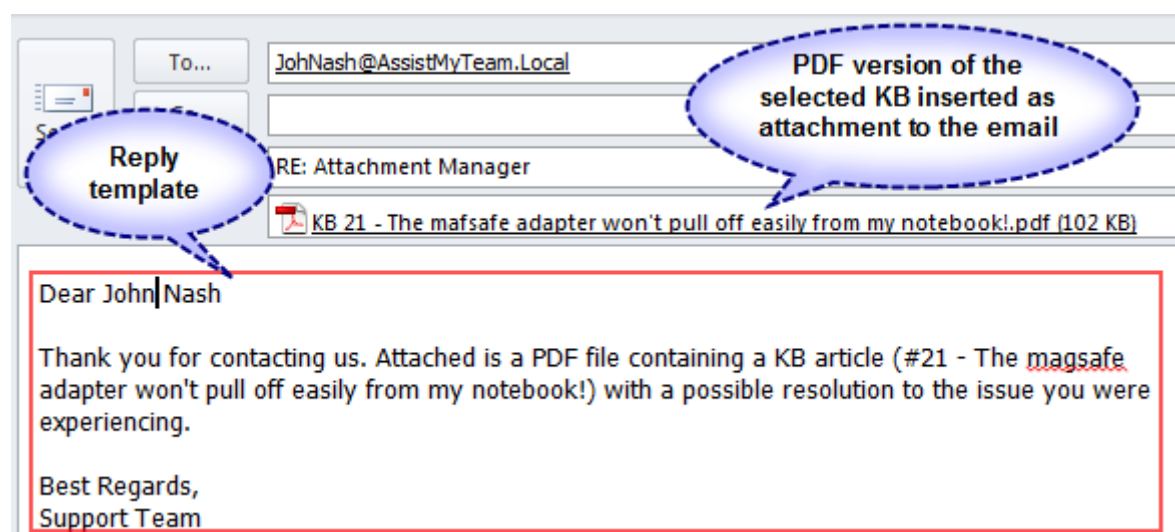


- 1 There are two templates provided that can be used when replying an email with a chosen KB article. With a template, you need not compose anything, even a single word, to make a personalized reply to the sender with a chosen KB article.

3 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 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.
- c) **Reply Email with a KB as URL** - This template is used when you choose a KB article to be inserted as web URL 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.





6.4 Clear Cache Credential

Once Team KB add-in is configured to connect to the KB Settings Data Source (a dedicated SharePoint list '**TeamKBSettings**'), the user credential is saved in cache/registry locally (provided the user had checked the remember option) so that, the user does not have to type in the username and password of the SharePoint site every-time the add-in connects to it.

But if the password has changed for the user (say in Active Directory), and if that user tries to access the SharePoint KB articles from Outlook, it would not succeed because the existing cached credential would fail. The fix to this issue is to reset the cache/registry key specific to Team KB add-in. This is done by clicking this '**Clear Cached Credentials**' button. This will reset any credentials that are saved in the local machine for all the configured SharePoint sites. And when the user tries to access the KB articles or perform some team settings, he/she would be prompted to enter the user credential (e.g. *username and password*).

Connect to 'assistmyteam2.sharepoint.com'.

Login

Login

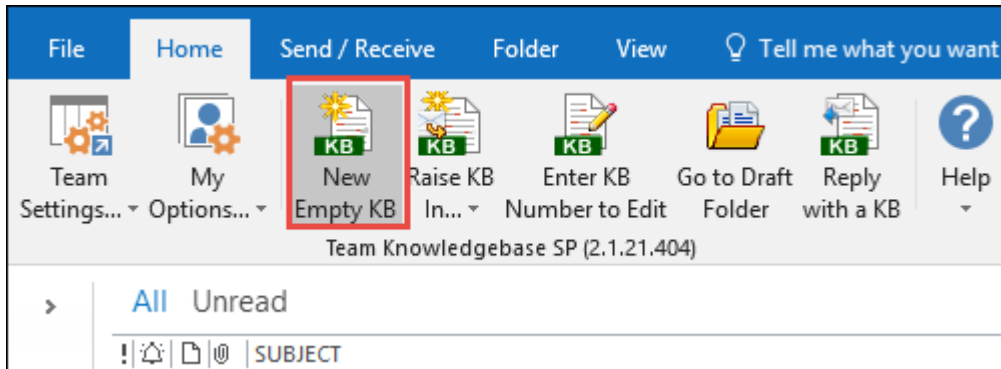
SharePoint Site URL	https://assistmyteam2.sharepoint.com/
User Name:	<input type="text" value="francas@assistmyteam.com"/>
Password:	<input type="password" value="*****"/>
	Use 'App Password' for Multi-Factor Authentication (MFA) account
Domain:	<input type="text"/> Optional
Authentication Mode:	Office 365 <input type="button" value="v"/>
ADFS Server:	<input type="text"/> Optional
	<i>e.g., sts.company.com</i>
Uniform Resource Name (URN) of your SharePoint	urn : <input type="text"/> : <input type="text"/> Optional
	<i>e.g., urn:sharepoint:portal</i>
	Know more on AD FS & URN parameters
	<input checked="" type="checkbox"/> Remember
	<input type="button" value="OK"/> <input type="button" value="Cancel"/>

6.5 Search KB Articles stored in SharePoint from Outlook

This is covered earlier in [section 5.8 Search KBs](#).

7. Generating new Empty KB Article

To generate a new empty KB article, click the 'New Empty KB' button in the KB toolbar in Outlook.



A new Outlook item (with the message class 'IPM.Post.TKBS.Article') will be generated in the draft 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).

The screenshot shows the 'New KB' form in Outlook. The form is titled 'New KB' and has a 'SharePoint Site/List' dropdown set to 'Support KB (https://assistmyteam2.sharepoint.com)'. The form includes fields for 'ID', 'Created', 'Modified', 'Author', 'Last Modified By', 'Category', 'Type', 'Client', 'ContactSource', 'InternalId', and 'States'. There are buttons for 'Edit Solution', 'Save As Draft', 'Publish KB', and 'Delete KB'. A checkbox labeled 'Not Ready For Use' is also present. Callouts explain the following:

- Choose the SharePoint list to store the KB article**: Points to the 'SharePoint Site/List' dropdown.
- Enter the KB article subject**: Points to the 'Subject' field.
- Choose a Category that fits this article**: Points to the 'Category' dropdown.
- Compose your KB article here and make use of Outlook's inbuilt formatting features, insert images and attachments etc.**: Points to the main text area.
- Feed data to additional custom fields that your administrator might had deployed**: Points to the 'Client', 'ContactSource', 'InternalId', and 'States' fields.

On the right side, there is a 'Post' button and a 'Create Table of Contents' section with instructions: 'In Word, you can create a TOC based text in... including... using...'. Below this, it says '1. Start Word, and then open your...

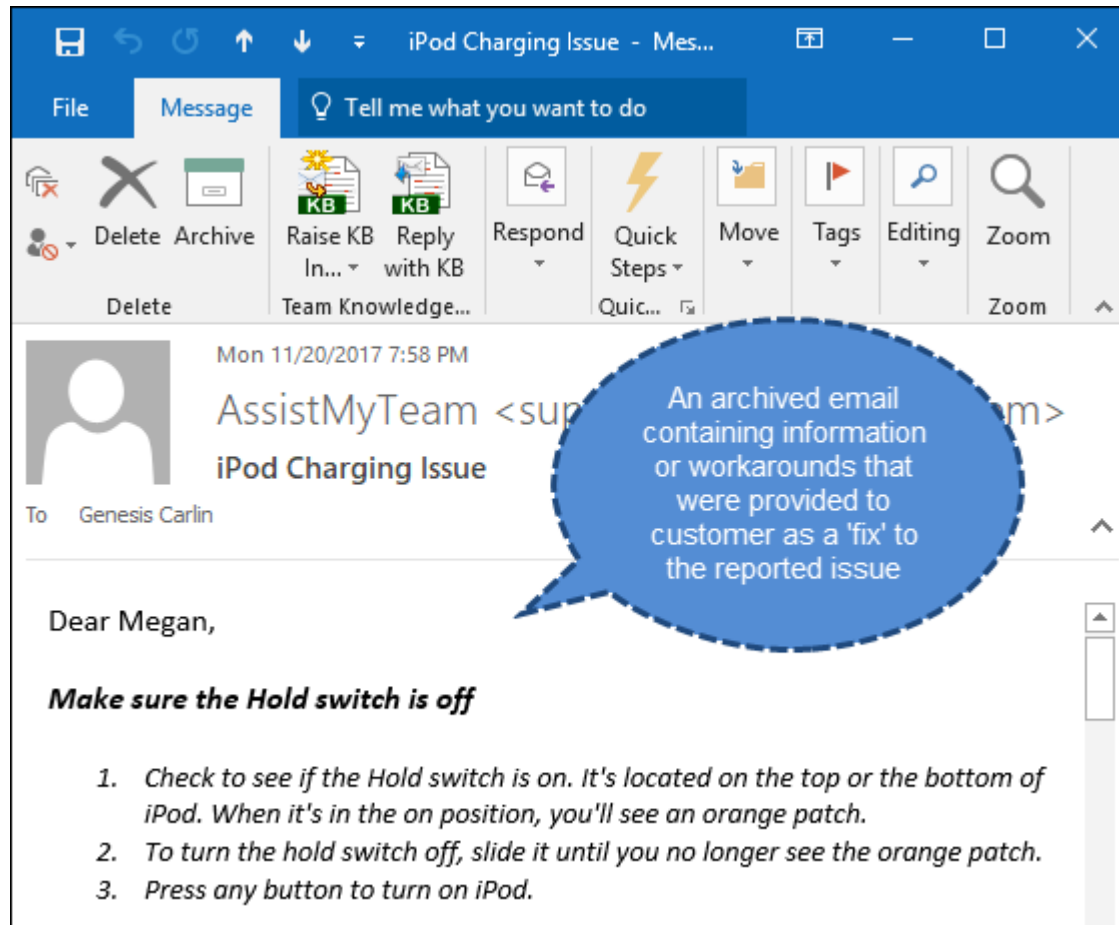
You can use feature rich formatting inbuilt tools of Outlook, embed images and attachments (just as you use to do while composing new emails). And don't forget to tag a category and type by choosing it from the drop-down fields within which this KB article falls within.

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.

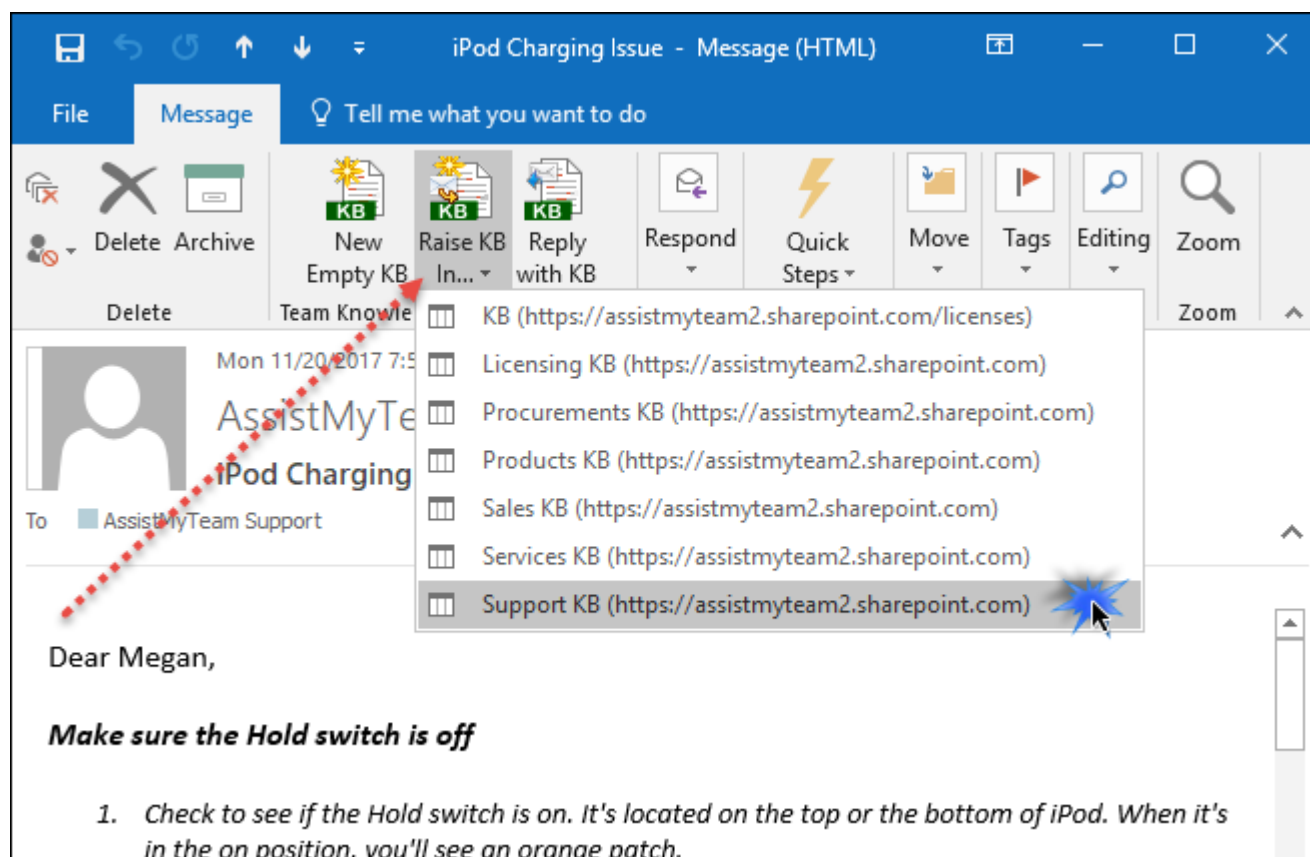
Once the KB article is ready for publication to the chosen SharePoint list, click 'Publish KB'. And a new KB article item will be generated in SharePoint, along with the formatting, contents, embedded images and attachments. If the KB article is still a work in progress, you can save it as draft in Outlook by click 'Save As Draft' button. What this will do is store this KB item in the draft folder of your primary mailbox for later use. Any time, you can navigate to that draft folder and open this KB article to finish it before publishing to SharePoint.

8. Generating new KB Article to SharePoint 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.





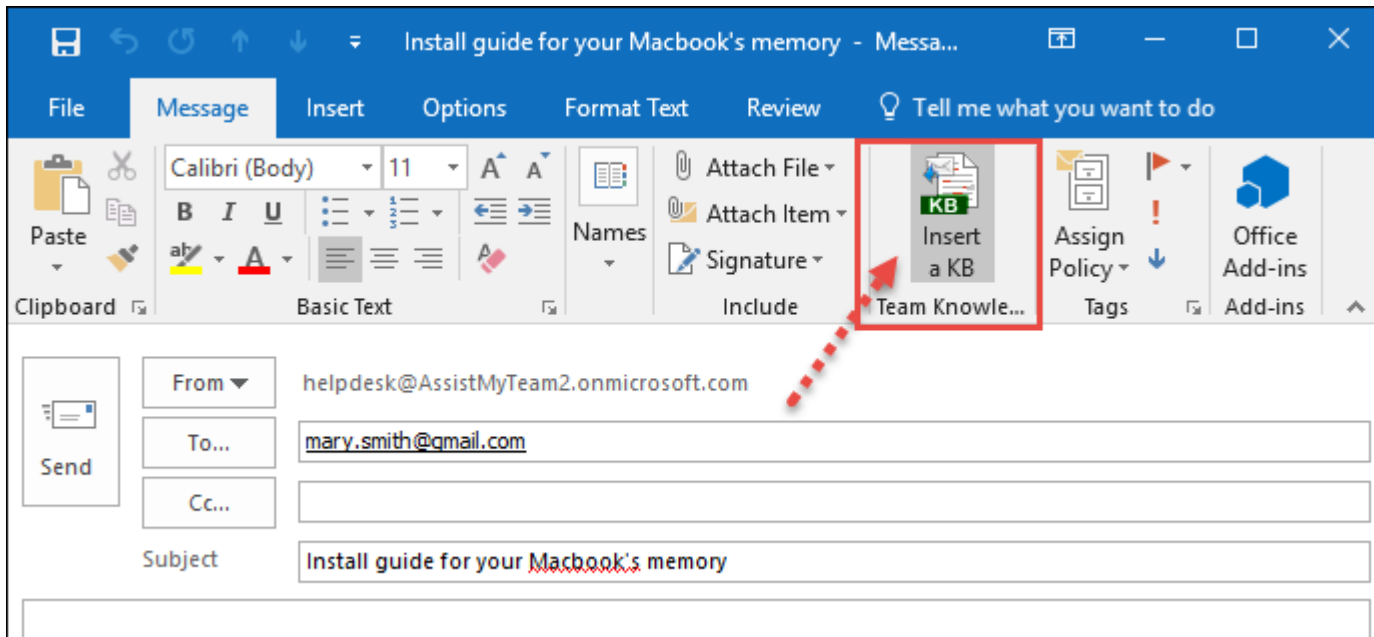
Instead, with Team KB Add-in, you can raise new KB articles from such emails, assign a unique ID, catalogue and tag it with metadata such as category, type and other information specific to your business and store it to one of your SharePoint list where it is available for use by your knowledge workers.

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.

Home Test Licenses EDIT LINKS			
Support KB			
+ new item			
All Issues Active Issues My Issues ... <input type="text" value="Find an item"/>			
✓	ID	Title	Created By
▶ Category : Cars (2)			
▶ Category : Colors (3)			
▲ Category : Hardware (4)			
▲ ProblemType : CPU (2)			
3	[125]	Mac OS X 10.5: Can receive email, but not send email	... <input type="checkbox"/> Bahrur Rahman
6		Smooth DVD playing guide ✖	... <input type="checkbox"/> Bahrur Rahman
▲ ProblemType : iPod (1)			
8		iPod Charging Issue ✖	... <input type="checkbox"/> Bahrur Rahman
▶ ProblemType : Keyboard (1)			

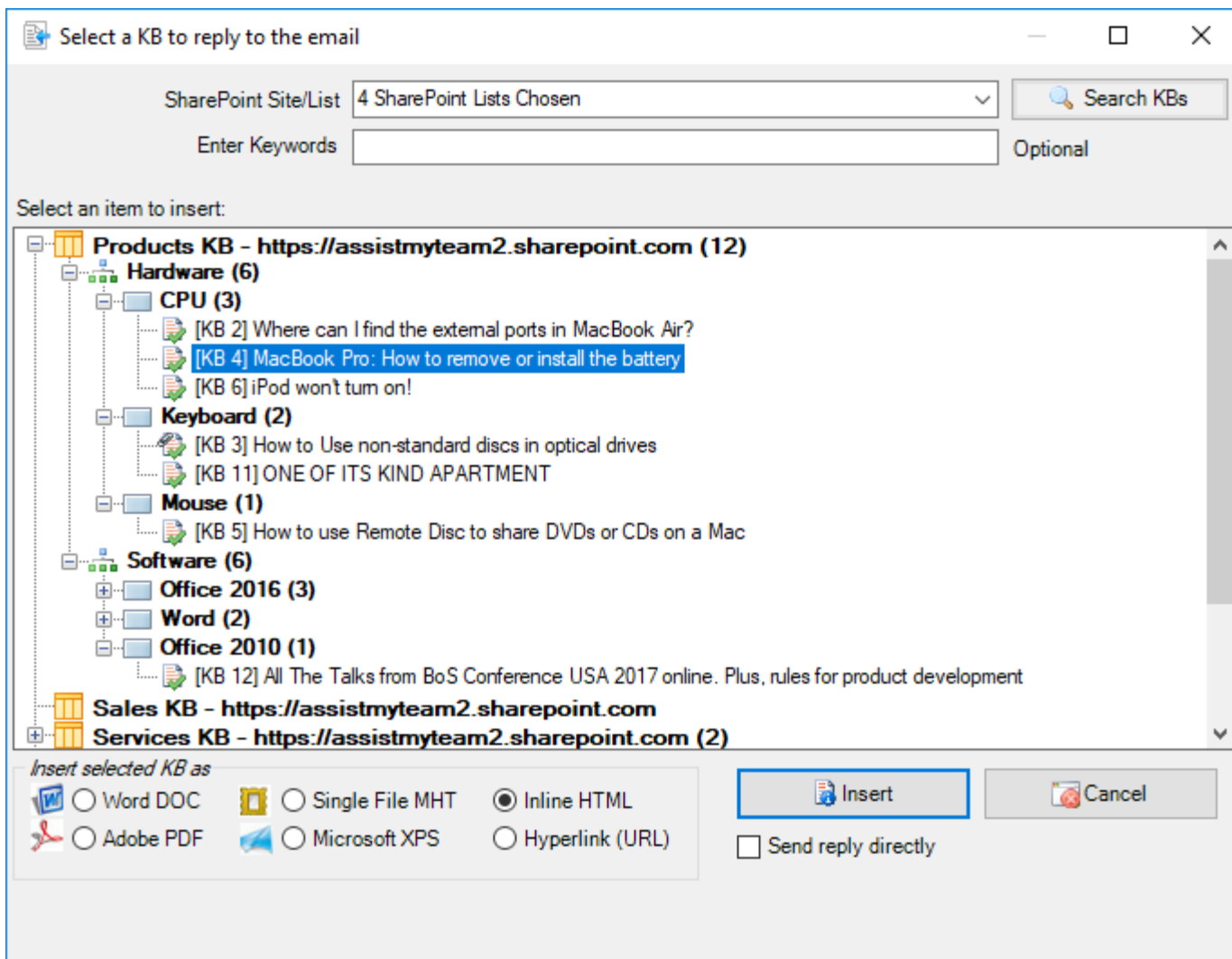
9. Inserting a KB Article to a new email when composing

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 Team KB 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), or as inline content or even as hyperlinked URL. If the KB article has any additional attachments, these too will be copied to the email.



From: helpdesk@AssistMyTeam2.onmicrosoft.com

To: mary.smith@gmail.com

Cc:

Subject: Install guide for your MacBook's memory

Attached: User Install Guide.pdf 657 KB

Dear Mary,

Thank you for contacting us. Please find a possible solution with the KB article (#100013 - MacBook Pro: How to install memory) embedded below:

I wanted to upgrade my MacBook memory. Can you please guide me through the process?

Resolution:

Your MacBook Pro computer has two memory slots that you access by removing the memory door in the battery bay. Your MacBook Pro comes with at least 512 megabytes (MB) of 667 MHz Double Data Rate (DDR2) Synchronous Dynamic Random-Access Memory (SDRAM) installed. It may have more memory preinstalled, depending on the configuration you chose when you bought the computer.

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).

BROWSE VIEW

Edit Item Version History Alert Me Shared With Workflows Delete Item Manage Actions

Home Notebook Recent boardKB SimpleKB WikiKB Licensing KB Sales KB Pages Site Contents Recycle Bin EDIT LINKS

Title	MacBook Pro: How to remove or install the battery
ProblemCategory	Hardware
ProblemType	CPU
Solution	<i>I wanted to upgrade my MacBook memory. Can you please guide me through the process?</i> Resolution: Your MacBook Pro computer has two memory slots that you access by removing the memory door in the battery bay. Your MacBook Pro comes with at least 512 megabytes (MB) of 667 MHz Double Data Rate (DDR2) Synchronous Dynamic Random-Access Memory (SDRAM) installed. It may have more memory preinstalled, depending on the configuration you chose when you bought the computer.
Attachments	User Install Guide.pdf

Created at 2/15/2018 12:01 PM by ☐ Bahrur Rahman
Last modified at 3/7/2018 11:14 PM by ☐ Bahrur Rahman

Close

10. 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.

The screenshot shows the Outlook ribbon with the 'Reply with a KB' button highlighted. A red callout bubble points to the button, stating: "Email from a customer seeking support to a frequently asked issue." Below the ribbon, an email is visible with the subject "Got a new battery for MacBook. Help required Urgent". A red arrow points from the 'Reply with a KB' button to a dialog box titled "Select a KB to reply to the email".

The dialog box contains the following elements:

- SharePoint Site/List: 3 SharePoint Lists Chosen
- Enter Keywords: [Text Box]
- Select an item to insert: A tree view showing categories like Hardware (5), Keyboard (1), Mouse (1), Software (5), Office 2016 (3), Word (2), Services KB, and Support KB. A specific KB article is highlighted with a yellow starburst: "[KB 4] MacBook Pro: How to remove or install the battery".
- Insert selected KB as: Radio buttons for Word DOC, Adobe PDF, Single File MHT, Microsoft XPS, Inline HTML, and Hyperlink (URL). Adobe PDF is selected.
- Attachment Naming: Radio buttons for Article ID, KB subject, and Both. Article ID is selected.
- Buttons: Insert, Cancel, and a checkbox for Send reply directly.

A red callout bubble points to the 'Insert' button, stating: "Choose a KB and click 'Insert' to attach or embed the KB content to a new email reply".

In the selection box (above), KB articles are arranged in a tree, with each SharePoint list 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.

You can choose from which SharePoint lists to show the matching KB articles in the selection box.



SharePoint Site/List	4 SharePoint Lists Chosen	Search KBs
Enter Keywords	<input type="checkbox"/> KB (https://assistmyteam2.sharepoint.com/licenses) <input type="checkbox"/> Licensing KB (https://assistmyteam2.sharepoint.com) <input type="checkbox"/> Procurements KB (https://assistmyteam2.sharepoint.com) <input checked="" type="checkbox"/> Products KB (https://assistmyteam2.sharepoint.com) <input checked="" type="checkbox"/> Sales KB (https://assistmyteam2.sharepoint.com) <input checked="" type="checkbox"/> Services KB (https://assistmyteam2.sharepoint.com) <input checked="" type="checkbox"/> Support KB (https://assistmyteam2.sharepoint.com)	Optional
Select an item to insert:		

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.

Products KB - https://assistmyteam2.sharepoint.com (12)

- Hardware (6)**
 - CPU (3)**
 - [KB 2] Where can I find the external ports in MacBook Air?
 - [KB 4] MacBook Pro: How to remove or install the battery
 - [KB 6] iPod won't turn on!
 - Keyboard (2)**
 - Mouse (1)**
- Software (6)**

Support KB - https://assistmyteam2.sharepoint.com (4)

- Colors (2)**
- Hardware (1)**
 - iPod (1)**
 - [KB 8] iPod Charging Issue

You can insert selected KB article in 3 ways to outgoing email:

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

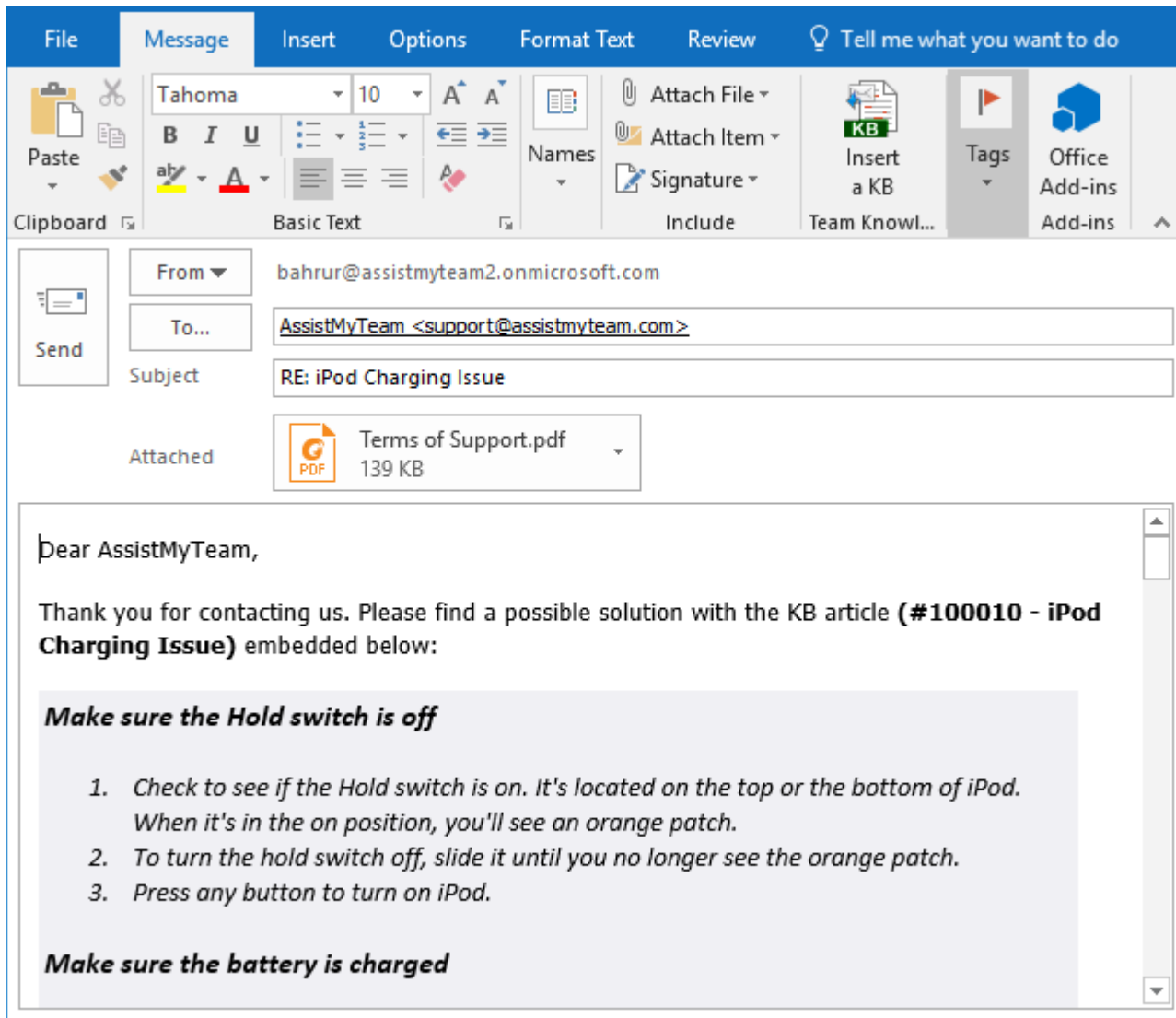
Selected KB article can be applied or inserted into the replied email in varied format. You can choose to insert as attachment in the form of a word document (*.doc), Adobe PDF (*.pdf), Microsoft XPS (*.xps) or as single file MHTML (*.mht).

File	Message	Insert	Options	Format Text	Review	Tell me what you want to do
Paste Send	Calibri 11 B I U Paragraph: Bulleted List, Numbered List, Indent, Decrease Indent, Increase Indent, Align Left, Align Center, Align Right, Justify Basic Text	Attach File Attach Item Signature Insert a KB Team Knowl...	Names Include	Tags Office Add-ins Add-ins	From: helpdesk@AssistMyTeam2.onmicrosoft.com To: Lisa.Ray@uni.melbourne.edu.au Subject: RE: iPod Charging Issue Attached: KB#100010 iPod Charging Issue.pdf (279 KB)	
<p>Dear Lisa Ray,</p> <p>Thank you for contacting us. Attached is a PDF file containing a KB article (#100010 - iPod Charging Issue) with a possible resolution to the issue you were experiencing.</p> <p>Best Regards,</p> <p>Support Team</p> <hr/> <p>From: Lisa Ray <Lisa.Ray@uni.melbourne.edu.au> Sent: Monday, November 20, 2017 7:58 PM To: AssistMyTeam Support <helpdesk@AssistMyTeam2.onmicrosoft.com> Subject: iPod Charging Issue</p>						



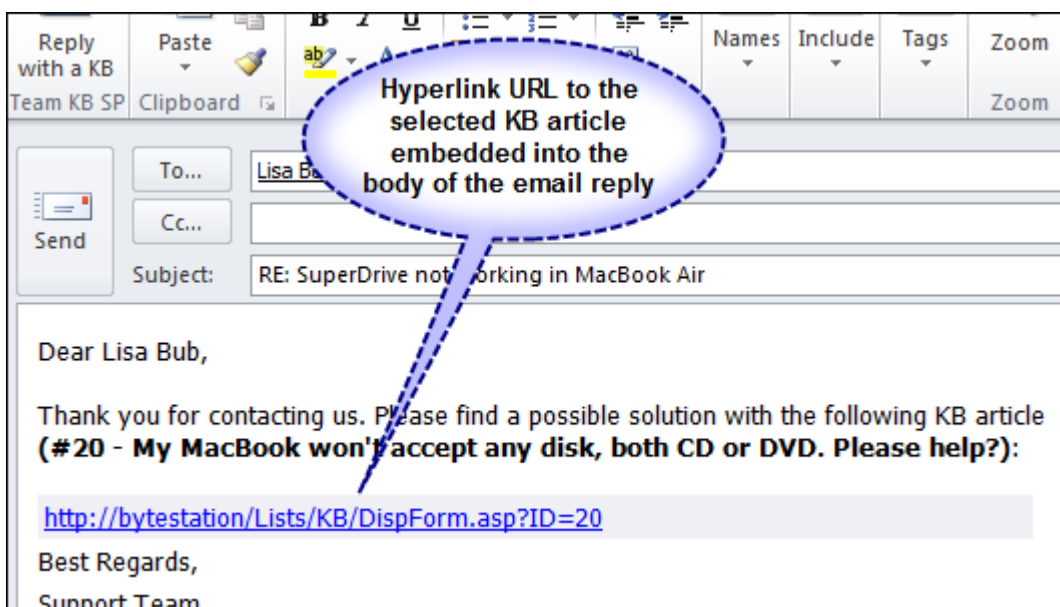
2) Inserting chosen KB article as inline content to the email reply

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.



3. Inserting chosen KB article as hyperlink URL into the email reply

Alternatively, if your SharePoint site is opened (i.e., accessible via the web), then you can also insert the hyperlink or URL of the selected KB article into the reply, so that the recipient can simply click the hyperlink to open the relevant article in their web browser.





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.

Insert selected KB as

☒ Word DOC
 ☐ Single File MHT
 ☒ Inline HTML

☐ Adobe PDF
 ☐ Microsoft XPS
 ☐ MSG file

☒ Send reply directly *Note that no compose inspector will be displayed!*

Insert Cancel

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

Select a template to customize

Reply Email with a KB as file attachment

Available Variables (Press 'Ctrl + C' to copy)

Placeholder Variables
KB_ID
KB_SENDER_NAME
KB_SENDER_EMAIL
KB_SUBJECT
KB_EMAIL SUBJECT

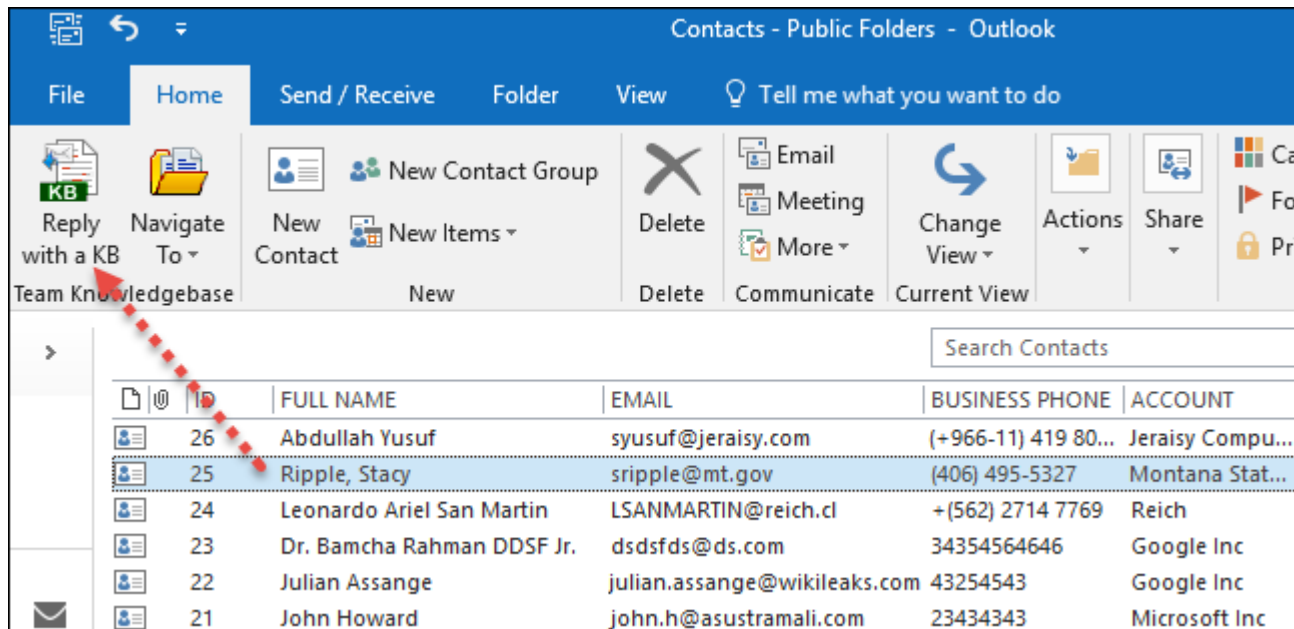
Dear KB_SENDER_NAME,

 Thank you for contacting us. Attached is a PDF file containing a KB article (#KB_ID - KB_SUBJECT) with a possible resolution to the issue you were experiencing.

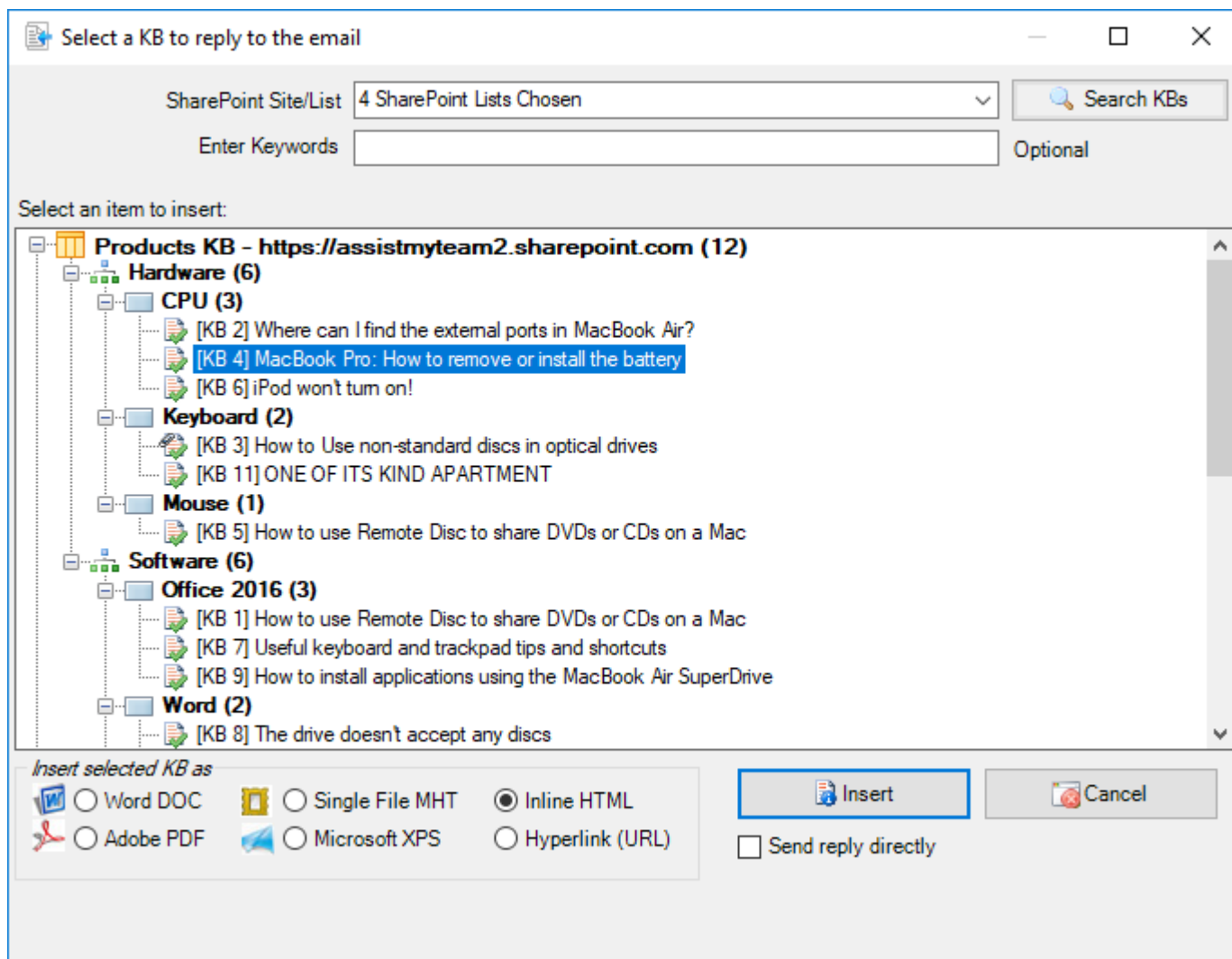
 Best Regards,
 Support Team

11. 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 Team KB toolbar in Outlook.



From the selection box, choose the appropriate KB article to send an email with the chosen KB article.



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.



File Message Insert Options Format Text Review Tell me what you want to do

Paste Arial 10 B I U Attach File Attach Item Signature Insert a KB Assign Policy Office Add-ins

Clipboard Basic Text Include Team K... Tags Add-ins

Send From helpdesk@AssistMyTeam2.onmicrosoft.com To sripple@mt.gov Subject MacBook Pro: How to install memory Attached User Install Guide.pdf 657 KB

Dear Stacy Ripple,

Thank you for contacting us. Please find a possible solution with the KB article (#100013 - MacBook Pro: How to install memory) embedded below:

I wanted to upgrade my MacBook memory. Can you please guide me through the process?

Resolution:

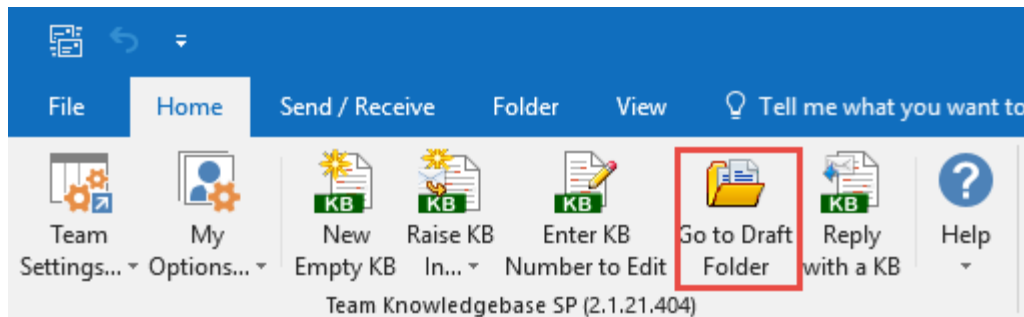
Your MacBook Pro computer has two memory slots that you access by removing the memory door in the battery bay. Your MacBook Pro comes with at least 512 megabytes (MB) of 667 MHz Double Data Rate (DDR2) Synchronous Dynamic Random Access Memory (SDRAM) installed.

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

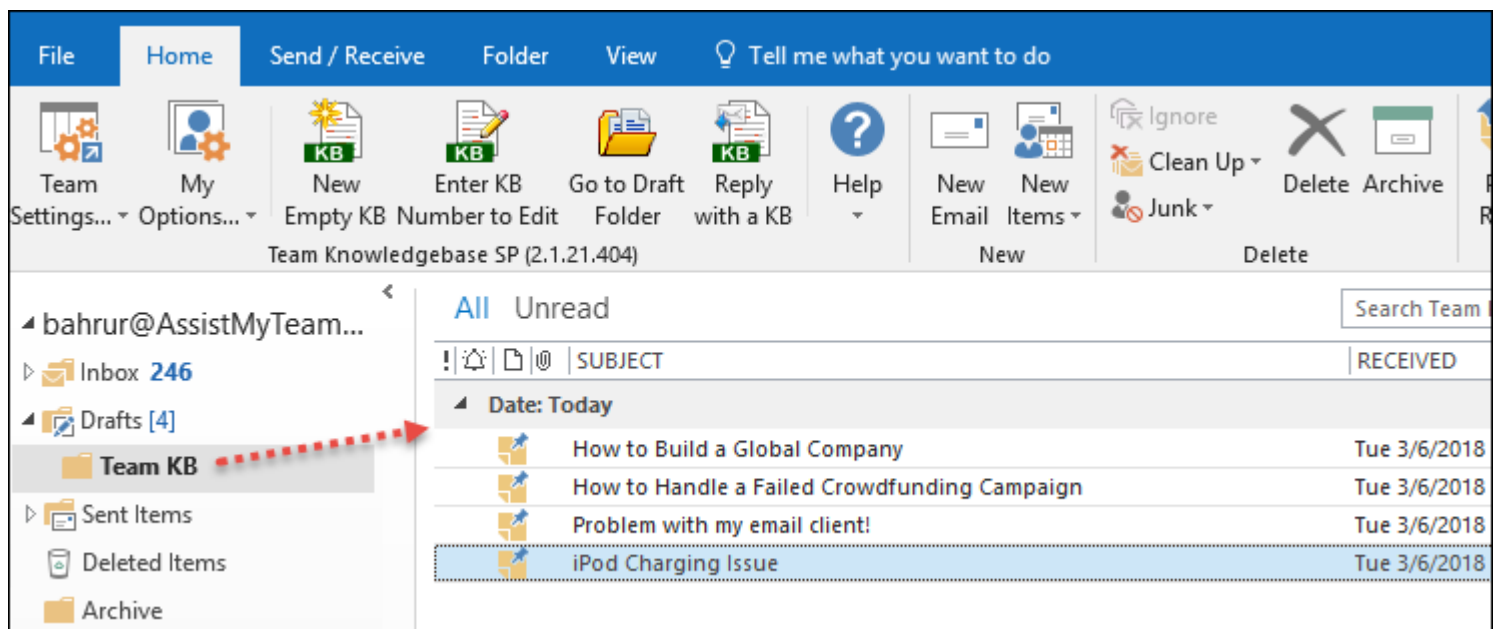


12. Navigate to the Draft KB Folder

You can compose new KB articles from the comfort of your Outlook and if these articles are work in progress, you can choose to save them in your draft folder for later use and editing. By clicking **'Go to Draft folder'** from the Team KB toolbar in Outlook, you can navigate quickly to your draft KB folder from your Outlook in a single click, without searching for it in the hierarchies of folders.

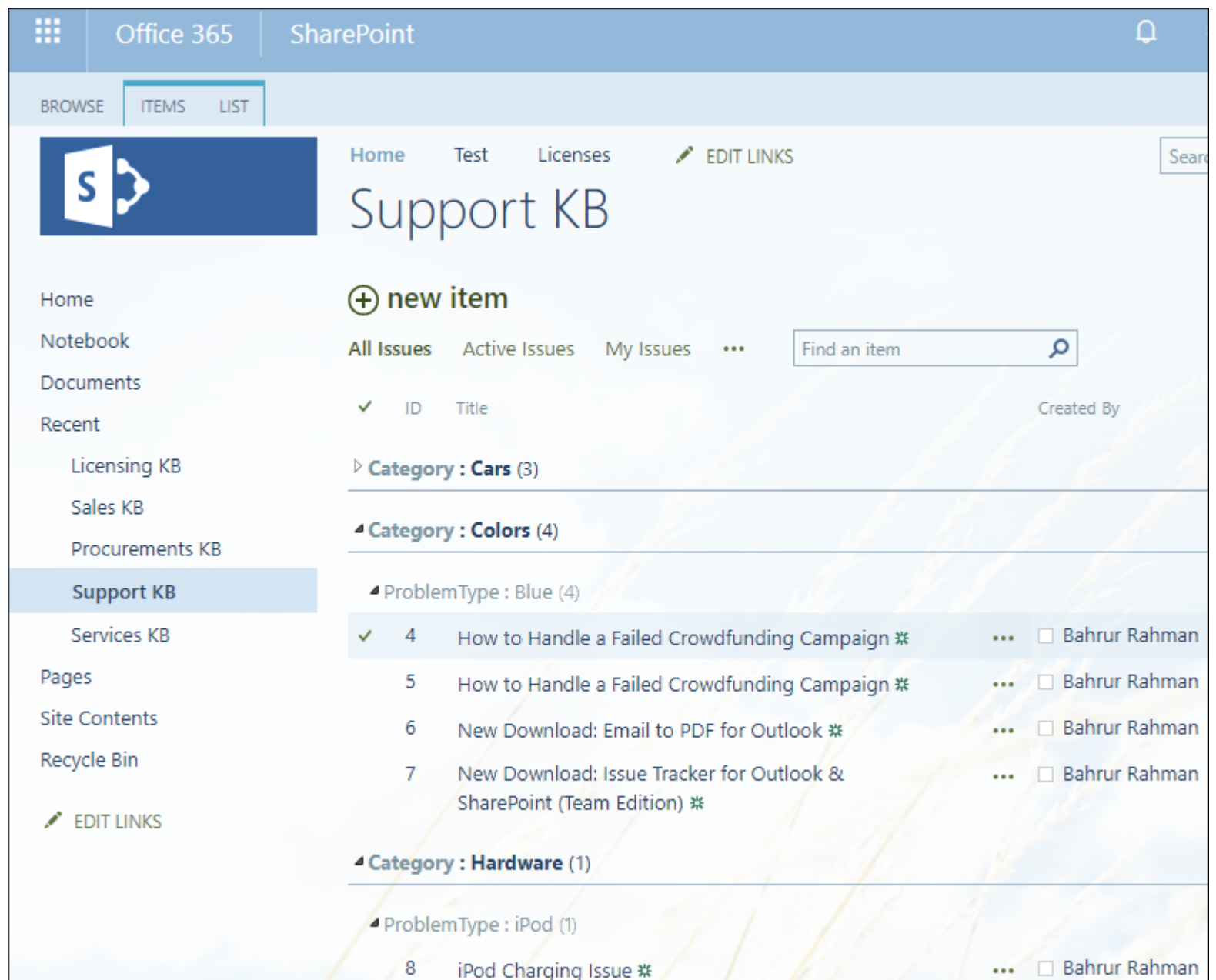
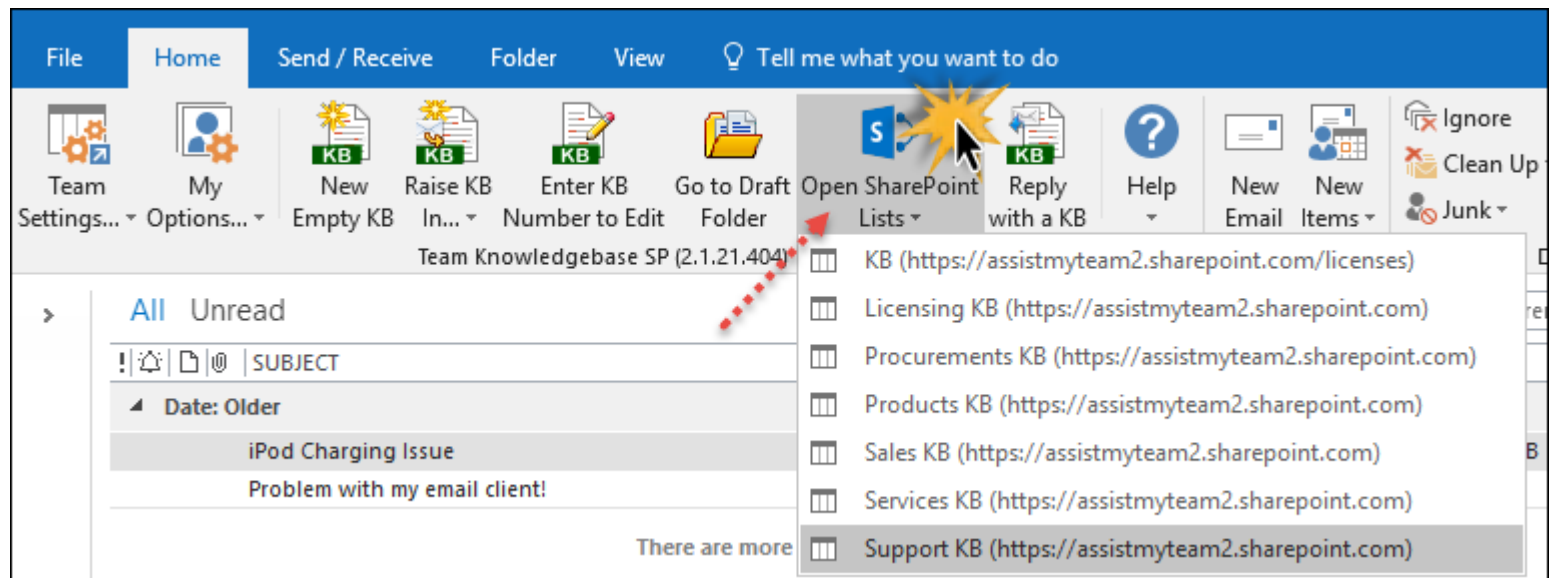


This draft folder 'Team KB' resides as a subfolder under the main Outlook 'Drafts' folder of your primary mailbox. Any KB articles which you had saved as draft will appear here. To edit or publish one, open it and using the KB form, you can further make changes to the KB article and when it is finished, you can publish it finally to the chosen SharePoint list.



13. Open KB SharePoint lists in web browser

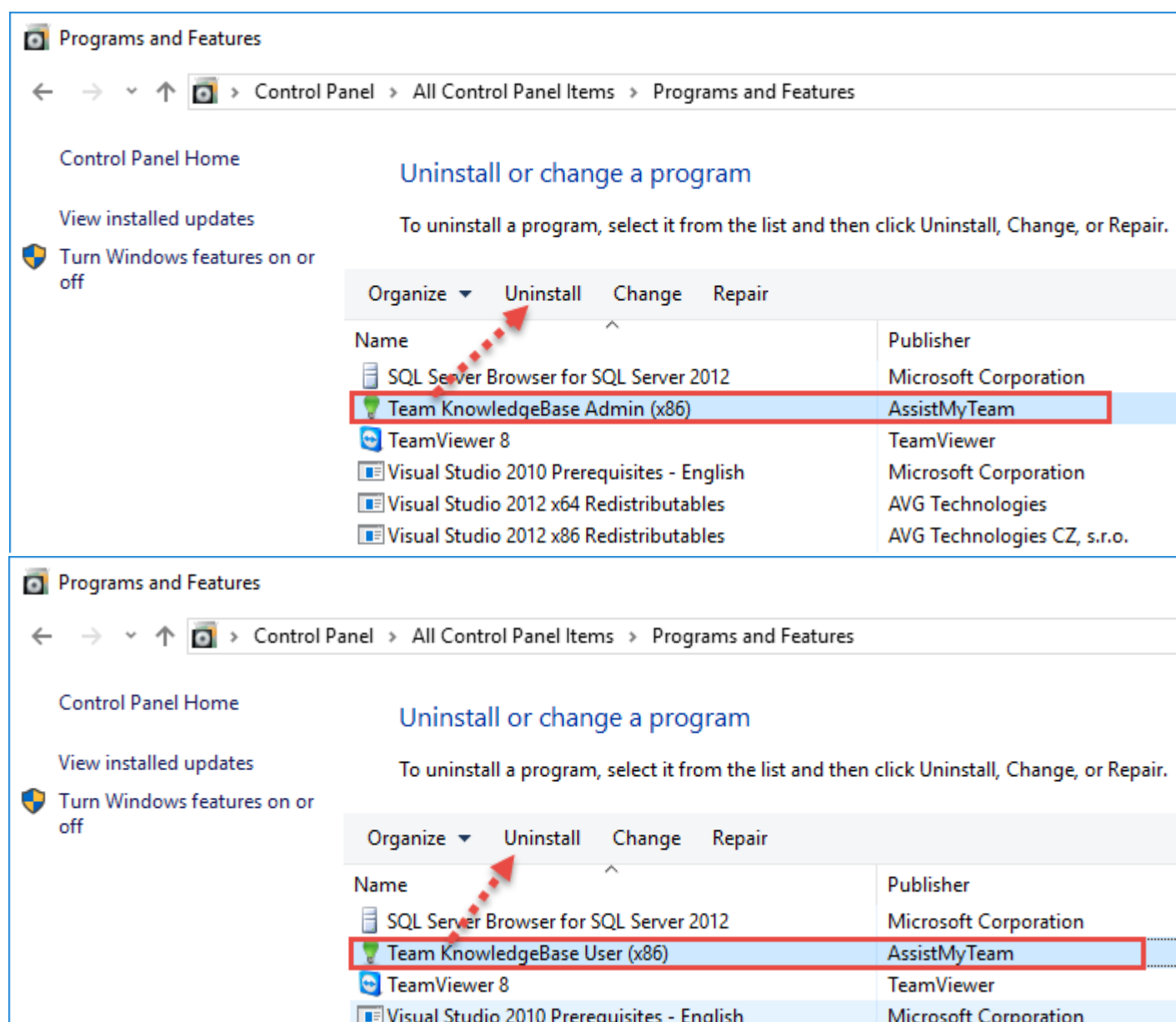
Your Administrator would surely have chosen and configured few or many KB SharePoint Lists where KB articles are stored. And if these SharePoint lists are configured with adequate permission levels to view the contents (at the very least), you can navigate quickly to any of these chosen KB SharePoint list in web browser from your Outlook in a single click, without typing in the URL in your web browser and clicking hierarchies of subsites.



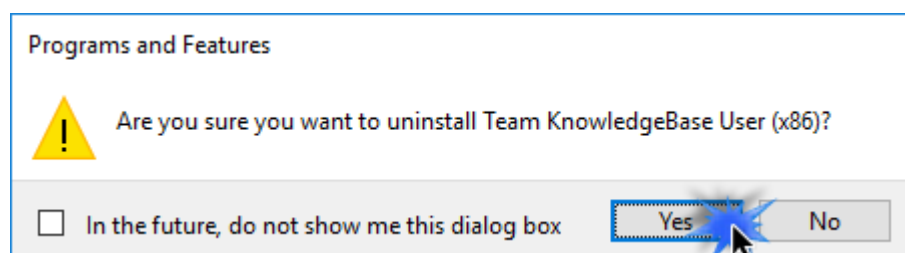
14. Uninstalling Team KB Admin and User add-ins

To uninstall the Team KB Admin and User Add-in tools from your computer, follow the steps outlined below:

Step 1: Go to 'Control Panel > Programs and Features'. Scroll down to select 'Team Knowledgebase SP' (Admin or User) and click 'Uninstall' as illustrated below:



Step 2: A dialog confirmation follows asking for confirmation. Click **Yes**.



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



15. Important links

[Team Knowledgebase for Outlook and SharePoint - Homepage](#)

Go to the official website of Team Knowledgebase for Outlook and SharePoint.

[Video Tutorial clips](#)

Watch video tutorials that teach you how to install, configure and work with Team Knowledgebase.

[Purchase License](#)

Purchase an enterprise team license for Team Knowledgebase for Outlook and SharePoint.

[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.