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KBase Manual

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1 INTRODUCTION

KBase is a knowledge base that runs completely in an Outlook folder and is available right inside Outlook. The articles are saved in Outlook in the same way as e-mails and appointments, so no database is needed.

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File Home	Send /	Receive Folder	View	N						ć	ລ 🕜
Change View ~ Concerning View Settings Reset View Current View	Conv	v as Conversations versation Settings ~ onversations	↓ Arrange By ▼	€=) •	Reverse Sort Add Columns Expand/Collapse マ angement	E Navigati E Reading To-Do B Layo	Pane * ar *	People Pane * People Par		/indow	1
Favorites	<	Full-text search	4	rrand	ae By: Custom						<
Mailbox - kalmstr	rom c	Search		⊿ G	alendar Browser for	Outlook					
⊿ 🖂 Inbox 🦳 Converted		Clear Search			Features Peter Kalmström It is possible to cha	inge the reso	8/14/2 urces fro				No upcoming appointments.
 HOSP Converted KBase 		New		_	Peter Kalmström We have a problem Peter Kalmström	on the Caler	8/14/2 dar Browse 8/14/2	er U Y	_		pointme
Carlor Contraction Contractica Contractic		Publish to web pag	es	_	I have seen that you Peter Kalmström		blic Folder 8/14/2	н Цү 2007 ПУ	-		
 Sent Items Sent Items Deleted Iter 	ms	Export To Excel			When I select the a Peter Kalmström I am testing Calend		8/14/2	2007	,		Today
Junk E-mail				⊳	Installation (11)						Today: 20 Tasks
Search Fold	lers			Þ	Usage (1)						91
Mail	•			Þ₽	xchange Server (1)						
Calendar		FAQ P		⊳ ka	almstrom.nu Outloo	k Solutions (2)				
si 🌶 🔍	-	KBase for Outle	ook ^e	Þ 0	I AP Reporting for F	xcel (1)			-	-	
							Q 10%	Θ	-		÷ .::

1.1 LANGUAGES

The language of *KBase* is automatically set to the same as of the computer's operative system. If the OS language is not supported by *KBase*, English is used instead. The supported languages are: Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Italian, Norwegian, Portuguese, Russian, Spanish and Swedish.

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1.2 SYSTEMS

KBase is easy to use and can be handled without many instructions, but this manual will help you to get the most out of the application. All screenshots in the manual is taken from a PC with Office 2007, English version, but *KBase* works with Outlook 2003 and 2010 also.

1.3 OWA

KBase articles can also be published to Outlook Web Access, but due to limitations in OWA they do not appear exactly the same in OWA as in Outlook. In OWA the articles can only be seen, not edited, and you cannot use the *KBase* search function but have to use OWA's instead. For information about OWA integration, please refer to the online video demonstrations at http://www.kalmstrom.com/products/Outlook/KBase/Demonstrations.htm.

1.4 SHAREPOINT

KBase can be integrated in a SharePoint site. For instructions on how to do that, refer to the online video demonstrations at http://www.kalmstrom.com/products/Outlook/KBase/Demonstrations.htm.

1.5 PERMISSIONS

You can define user-groups by setting permissions on the Outlook folder where *KBase* is installed. All *KBase* editors must have write permission over the *KBase* file folder.

2 INSTALLATION OF KBASE

KBase may be installed in any folder on a PC and in Outlook, but if you wish to share the articles you should use a network folder and a public or shared Outlook folder. This is the installation described here.

Create a *KBase* directory in a network drive and save the file you downloaded – **KBaseSetup.exe** – into it. You can use either a UNC-path, such as \\servername\sharename, or a mapped drive, such as Y:. Then run the KBaseSetup.exe and follow the instructions.

If you already have a *KBase* installation you can select the alternative Repair/Upgrade, but here we will describe a New installation.

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Setup - Installation Type				
The Knowledge Base that runs completely in Outlook KBase for Outlook®				
Select an installation type				
New KBase				
Repair/Upgrade existing KBase				
Exit	Previous			

Next step is to select or create the network shared folder where KBase will be installed.

Set-up - Select installation folder				
The Knowledge Base that runs completely in Outlook Www.kalmstrom.com				
Select a folder where all the required files will be placed.				
We recommend selecting/creating a network shared folder such that all users can have access to the files. You need to have read permission for this network folder for all your users.				
Choose a folder for installation to continue.				
X: \KBase				
Exit For more info, visit <u>www.kalmstrom.com</u> Previous Next				

If you want to familiarize yourself with *KBase*, you can make use of the possibility to create example data. This possibility is offered at the end of the installation, when you are asked to select Outlook folder. You will be offered the some FAQ from www.kalmstrom.com.

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Set-up - Apply settings to Outlook				
The Knowledge Base that runs completely in Outlook KBase for Outlook®				
Outlook needs to be configured.				
In the next step, you will be prompted to select/create an Outlook folder of the "Mail and Post Items" type. A folder homepage will be linked to that Outlook folder.				
We recommend you to select/create the Outlook folder among the 'Public Folders' so that all your users can access this application. Appropriate permission for this folder has to be set for all your users.				
Load some example data.				
Exit For more info, visit <u>www.kalmstrom.com</u> Previous Next				

When you are asked to select an Outlook folder it should be a public folder or shared mailbox.



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When the installation is finished you will get a message that it has succeeded. The *KBase* directory should have the following content.

When you have used the Export to Excel feature for the first time, you will also get a KBaseExportSettings.xml file, and if you opt to export HTML files you will get a folder for them.

KBase
Name
 bg.gif KBaseArchive.exe KBaseEmpty.pst
KBaseExcelExport.exe KBaseFilled.pst KBaseRect.gif
 KBSettings.txt OKBase.htm OKBaseForm.fdm ReadMe.txt

3 USING KBASE

Whenever you want to save information, a solution to a problem or something else you want to remember and share with others, *KBase* is easy at hand in your Outlook.

If you use *KBase* with the information sharing and support handling application *Public Folder HelpDesk*, also from kalmstrom.com Business Solutions, the most common will be that you save a finished support case as a *KBase* article by simply clicking a button.

If you use *KBase* alone you will create new articles by writing or copying and pasting information into them. In both cases you can use images, hyperlinks and attachments in the articles.

3.1 CREATE NEW ARTICLE

To create a new *KBase* article, click the button New in the *KBase* homepage. The first time you do this the *KBase* form will be installed, which only takes a second or two.

When the new, empty article comes up, you can write, paste or insert text, images, links or attachments. You can also use all the other Outlook tools, like format text and spelling check.

The two "Created by" fields are filled out automatically with your name and date when the ticket is posted.

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There are three fields that are normally filled out in the article: Subject, Problem Category and Problem type. The subject you must write or paste, but you can choose the problem category and type from drop-down lists.

If *KBase* is empty you don't have any categories or types. Just write something in the fields and *KBase* will remember it and show it the next time. Later, if you need a new category or type, you also just have to write them in the fields instead of selecting anything.

When the article is finished, click $\ensuremath{\mathsf{Post}}$ and it will be saved in .rtf format.

Full-text search	
Search 🔎	
Clear Search	
New	

😱 🖟 🕫 🍝 🔶 Ŧ	Untitled - HelpdeskKBArt	icle		_ = ×
HelpdeskKBArticle Insert Options I	Format Text			۲
Image: New of the second sec	E·E·♥ ℓ ₽·	Categorize Follow	ABC Spelling	
Send Clipboard 🖼 Basic Text	🖗 Include	Options	Proofing	
Subject Problem category	Problem type			2
Calendar Browser for Outlook Exchange Server	None		•	KBase for Outlook®
kalmstrom.nu Outlook Solutions OLAP Reporting for Excel Outlook NameDays Public Folder HelpDesk for Outlook Support TimeCard for Outlook				ē
				=
www.kalmstrom.nu				_

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3.2 EDIT ARTICLE

- Outlook 2003: under Edit select "Edit content"
- Outlook 2007: select 'Revise content' under Other actions
- Outlook 2010: under Actions, select "Edit message"

Edit and then post the article again.

3.3 PRINT ARTICLE

To print an article, right click it and select Print.

Full-text search	Arrange By: Custom					
	👔 Peter Kalmeteär		8/14/2007			
	I have see 🗎	<u>C</u> opy	Folder H			
Search 🔎	🕼 Peter Kalr 🙀	Quick Print	8/14/2007			
	When I se	Post Reply	v to hav			
Clear Search	🕼 Peter Kalr 🎽	Reply	8/14/2007			
	I am testir 🌳		tlook on			
	N 1 - 1 - 1 - 1 - 1 -	For <u>w</u> ard	1			
New	🖹 Installatio	Mark as U <u>n</u> read				
	Usage (1)	Ca <u>t</u> egorize ►				
Publish to web pages		Follow <u>U</u> p ▶				
Evport To Evcol	👂 Exchange Se 칠	<u>F</u> ind Related →				
Export To Excel	⊳ kalmstrom.n	Quick Steps →				
	·····	Rule <u>s</u> •				
	OLAP Report	<u>M</u> ove ►				
FAO		One <u>N</u> ote				
	Outlook Nan Solution	<u>J</u> unk ▶				
KBase for Outlook®	▶ Public Folder ×	<u>D</u> elete				

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3.4 SEARCH ARTICLES

To search for a certain article, write one word or more in the box and click Search. *KBase* will then make a search of all the text in the articles and list all articles which contain the word you have written.

Click Clear Search if you want to try with another word.



3.5 SAVE ARTICLES AS WEB PAGES

To save articles as web pages, click the button Publish to web pages. You will then be presented with a screen where you can decide what problem categories and types that should be saved and how they should be saved. Uncheck the categories or types you don't want to publish.

A table of content can be generated automatically, and there articles can be grouped by Problem category and type and with a collapsible outline.

If you want to see an example on *KBase* articles saved as web pages, please visit <u>http://www.kalmstrom.com/products/Outlook/KBase/FAO/</u>



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KBase for Outlook (2.2.384)	×
This tool archives KB items from the Outlook for into webpages ready for publication.	FAQ Ralmstrom.com
Select the folder to place the web pages.	Business Solutions
C:\Users\English\Documents\KBase\	
Naming scheme of webpage	
O Use subject	ncremental numbering 1000
 Generate Table of Content (index.htm) Group generated web KB Articles by Problem Category & Type Collapsible Outline Collapse Initially None 	Other Settings Include Attachments Overwrite files Run index.htm when done
Select Problem Categories & Types	
Problem Category	V Problem Type
 Calendar Browser for Outlook Exchange Server kalmstrom.nu Outlook Solutions OLAP Reporting for Excel Outlook NameDays Public Folder HelpDesk for Outlook TimeCard for Outlook 	 ✓ Communications ✓ Features ✓ General ✓ Installation ✓ Metadata ✓ Usage
License www.kalmstrom.com	Generate Exit

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When you have clicked Generate, Microsoft Office Outlook Outlook might give a warning message. In that case you have to A program is trying to access e-mail address information allow access to be able to save KBase 1 stored in Outlook. If this is unexpected, click Deny and verify articles as web pages. your antivirus software is up-to-date. For more information about e-mail safety and how you might be able to avoid getting this warning, click Help. Allow access for 5 minutes × Allow Deny Help

When the web pages are generated, Internet Explorer may give you a warning too. In that case you must allow blocked content to be able to expand and collapse problem categories and types. Only Internet Explorer allows the collapsing and expanding.

🕐 To help protect your security, Internet Explorer has restricted this webpage from running scripts or ActiveX controls that could access your computer. Click here for options				
	Allow Blocked Content			
Table of Contents	What's the Risk?			
	More information			
Calendar Browser for Outlook				

KBase Archive Tool imports attachments and inline images while generating *KBase* web pages. Those attachments are placed in sub-folders. Image attachments such as BMP are automatically converted to JPEG, to make it compatible for web browser as well as to decrease the rather large size of the bitmap.

Note: when you need to regenerate .html files again after adding/removing/editing articles, if you want to have also the articles that were not changed left in the index, you need to select all categories and types that were selected before. The index will list only those article categories and types that are generated at each time, and it will not keep anything from an earlier generating.

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3.6 EXPORT TO EXCEL

		To export <i>KBase</i> articles to an Excel				
네 HTMLBody	Export To Excel	datasheet, use the button in the KBase				
📧 bg.gif		homepage or run the file				
		KBaseExcelExport.exe in the KBase				
💽 KBaseArchive.exe	installation folder. Open	the <i>KBase</i> folder in Outlook before you				
ItBaseEmpty.pst KBaseExcelExport.exe	run the file. You may select some articles in <i>KBase</i> or export by other criteria, see below.					
🔜 KBaseExcelExport.exe	by other criteria, see ber	ow.				
KBaseExportSettings.xml	(With this tool you may also export items from other Outlo					
	folders to Excel. Just sele	ect the items you wish to export and run				
	the file.)					

You may also opt to include the article attachments and to show the article in HTML in the Excel data sheet. Click the "Export to Excel" button when you have made your choices.

This is the default screen and choice. When you have made your own choice *KBase* will remember it in the file KBaseExportSettings.xml and show it the next time you want to export to Excel.

Export to Excel						
Export article text in HTML	Export to Excel					
Include attachments	Exit					
 Export selected item(s) 						
Export KBase articles						

If you select the alternative "Export KBase articles" the screen expands. You may now export *KBase* articles by Problem Category and Problem Type. Uncheck the box if you don't want to include a Category or Type. It is also possible to export articles created by a certain user.

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This is how the Excel report might look.

X	🚽 🖉 🕶 (°i 🗸 i 🖵					Table Tools		Book1 - Micros	soft Excel
1	ile Home Ins	ert Page Layo	out Fo	rmulas Data	Review View	Design			
ſ	🗎 🔏 Cut	Calibri	- 11	· A A =	= = >-	Wrap Text	General	· .	Check Cell
Pa	ste	BIUY	1	A . A . =	三日住住	Merge & Center -	\$ - % ,	-09 Conditio	nal Format Hyperlink
	Format Painter	b 1 U		<u>~</u> · <u>A</u> ·=-		untand a		►.0 Formattin	ig * as Table *
	Clipboard 🕞	-	Font	Es.	Alignme	nt G	Number	Ta .	
	G36	- (* fs	HTML	Body					
	А	В		С	1)	E	F	G
1	From 💌		gory 🔽	Problem Typ 💌		💌 I	Date 🔽	Text body	💌 HTML bo 💌 Attachme
2	Peter Kalmström	Calendar Brow	wser for C	Features	It is possible to c	hange the resource	8/14/2007 9:38	3 <u>Text Body</u>	HTML Body
3	Peter Kalmström	Calendar Brow	wser for C	Features	We have a proble	em on the Calenda	8/14/2007 9:33	7 Text Body	HTML Body
4	Peter Kalmström	Calendar Brow	wser for C	Features	I have seen that	our product Publ	8/14/2007 9:33	7 <u>Text Body</u>	HTML Body
5	Peter Kalmström	Calendar Brow	wser for C	Features	When I select the	alternative Over	8/14/2007 9:13	3 Text Body	HTML Body
6	Peter Kalmström	Calendar Brow	wser for C	Features	I am testing Cale	ndar Browser for (8/14/2007 9:13	3 Text Body	HTML Body
7	Peter Kalmström	Calendar Brov	wser for C	Installation	Every time I pres	s Manage I get a w	8/14/2007 9:33	7 Text Body	HTML Body
8	Peter Kalmström	Calendar Brow	wser for C	Installation	When I run the se	etup of Calendar E	8/14/2007 9:33	7 <u>Text Body</u>	HTML Body
9	Peter Kalmström	Calendar Brow	vser for C	Installation	We have installe	d Office 2007 and	8/14/2007 9:33	7 Text Body	HTML Body
10	Peter Kalmström	Calendar Brow	wser for C	Installation	I tried installing y	our product this r	8/14/2007 9:37	7 Text Body	HTML Body
11	Peter Kalmström	Calendar Brov	wser for C	Installation	Is it possible to g	et a new evaluatio	8/14/2007 9:33	7 Text Body	HTML Body
12	Peter Kalmström	Calendar Brow	wser for C	Installation	Folder homepage	e does not work - '	8/14/2007 9:33	7 Text Body	HTML Body
13	Peter Kalmström	Calendar Brov	wser for C	Installation	Although I have t	he proper versior	8/14/2007 9:37	7 Text Body	HTML Body
14	Peter Kalmström	Calendar Brow	wser for C	Installation	On some of the c	omputers I am ge	8/14/2007 9:33	7 Text Body	HTML Body
15	Peter Kalmström	Calendar Brov	wser for C	Installation	About 90% of our	computers are ge	8/14/2007 9:33	7 Text Body	HTML Body
16	Peter Kalmström	Calendar Brow	wser for C	Installation	In the lower right	corner there is a	8/14/2007 9:37	7 Text Body	HTML Body
17	Peter Kalmström	Calendar Brow	wser for C	Installation	I get evaluation p	eriod expired - e	8/14/2007 9:37	7 Text Body	HTML Body
18	Peter Kalmström	Calendar Brow	wser for C) Usage	Is there a way to	stop the "open fil	8/14/2007 9:33	7 Text Body	HTML Body
19	Peter Kalmström	Exchange Sen	ver	General	Is there any way	around the need f	8/14/2007 9:33	7 Text Body	HTML Body
20	Peter Kalmström	Exchange Sen	ver	General	We utilize a Man	aged Exchange Se	8/14/2007 9:37	7 Text Body	HTML Body
21	Peter Kalmström	OLAP Reporti	ng for Exc	Features		OLAP Reporting T	8/14/2007 9:33	7 Text Body	HTML Body
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4 REGISTRATION AND TRIAL INFO

You may evaluate *KBase* for 30 days. If you want to continue using the program after the trial period, you must register it.

The registration is performed by clicking the 'License' button in the Archive Tool (press the button Publish to web pages to reach it).

The license can be bought at the <u>KBase Purchase page</u>. When you have received our e-mail with the registration code, insert in the empty field and click Register. You must be connected to the internet for registration to work.

If you are a Member of <u>kalmstrom.com Community</u>, you may use *KBase* without any extra costs. Just contact the kalmstrom.com Sales department at <u>sales@kalmstrom.com</u> and ask for a registration key, and we will send it to you promptly.

KBase for Outlook					
?	This is an unregistered version of KBase for Outlook! This version will function 30 more days.				
	dy have a registration key, enter it below to activate and register the application. You ive internet connection for this to work.				
Registration	Key Register				
<u>www.kalms</u>	rom.com				

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5 SUPPORT

Three months of the <u>kalmstrom.com Single Support</u> are included in the purchase price of *KBase*, and you are very welcome to renew the services when they expire. The kalmstrom.com Support Services give the following assistance:

- Free upgrades of the applications you have purchased licenses for Never worry about upgrades.
- Your e-mails answered within 24 hours*
- A scheduled telephone or Skype conference within 36 hours*
- Remote connection services
- Influence on future versions and features

*during Western Europe working days

6 CONTACT

If you have any kind of problem or questions about our software, there are several ways of contacting us:

E-mail	<u>support@kalmstrom.nu</u> – Technical issues
	sales@kalmstrom.nu – General issues
Telephone	+46 739 206 106 Within USA: (800) 518-4155
Online chat	www.kalmstrom.com

7 UNINSTALLATION

To un-install *KBase*, delete all the *KBase* files and folders, both in Outlook and on the network share that you installed it to.

KBase does not install anything on your local machine nor on the Exchange server. Therefore it does not show up in your Control Panel under Add/Remove programs.

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