KBase Manual

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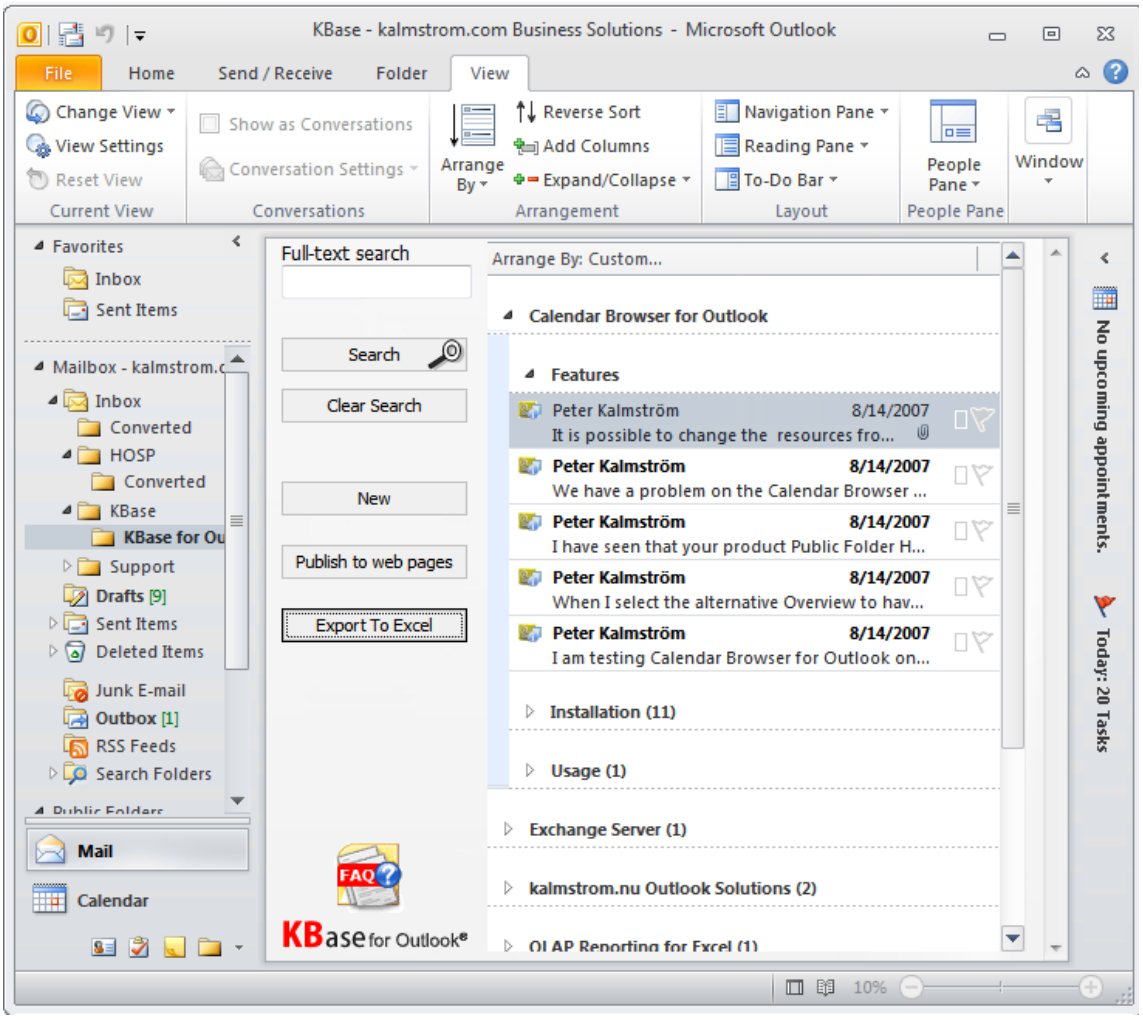
1 INTRODUCTION

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.



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.

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

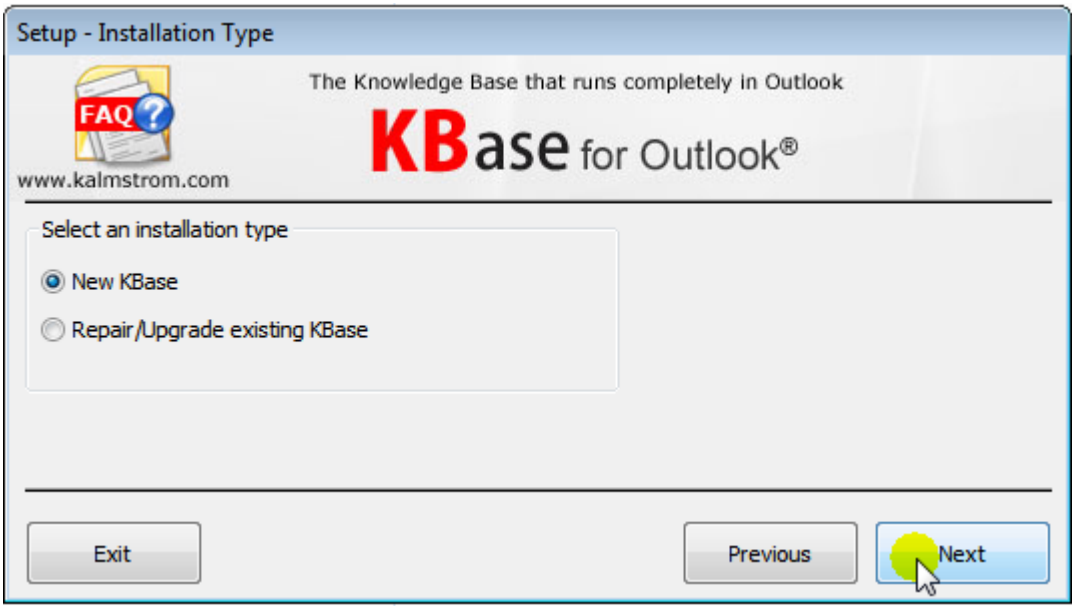
You can define user-groups by setting permissions on the Outlook folder where *KBase* is installed. All *KBase* editors must have write permission over the *KBase* file folder.

2 *INSTALLATION OF* KBASE

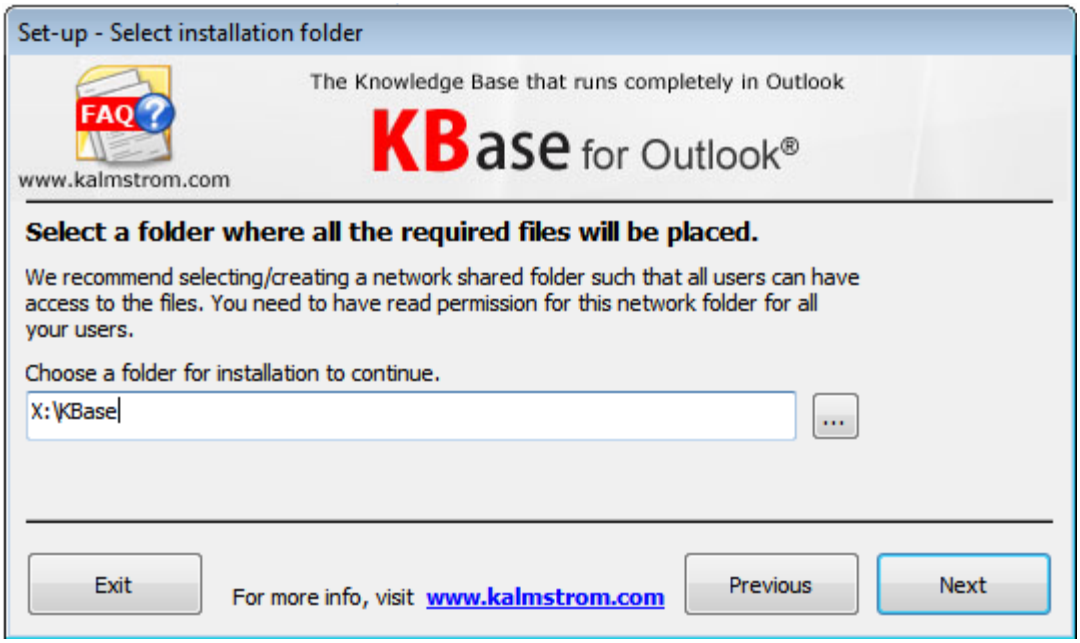
KBase may be installed in any folder on a PC and in Outlook, but if you wish to share the articles you should use a network folder and a public or shared Outlook folder. This is the installation described here.

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.

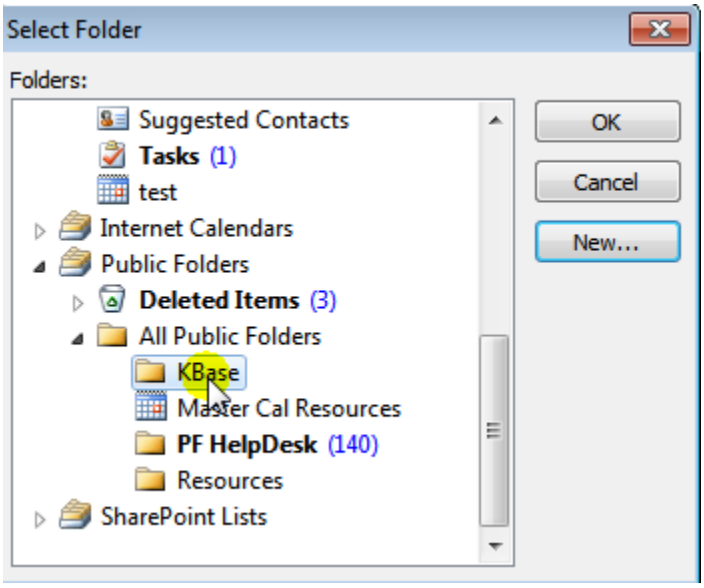


Next step is to select or create the network shared folder where *KBase* will be installed.



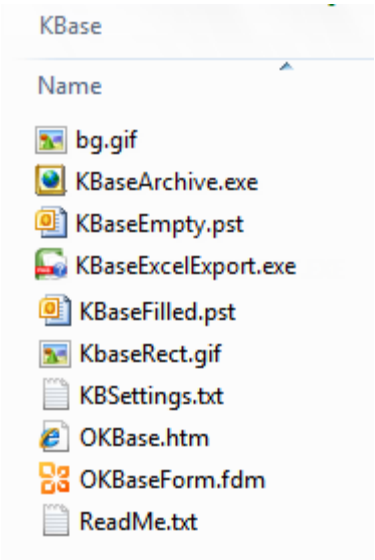
If you want to familiarize yourself with *KBase*, you can make use of the possibility to create example data. This possibility is offered at the end of the installation, when you are asked to select Outlook folder. You will be offered the some FAQ from www.kalmstrom.com.

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



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.



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.

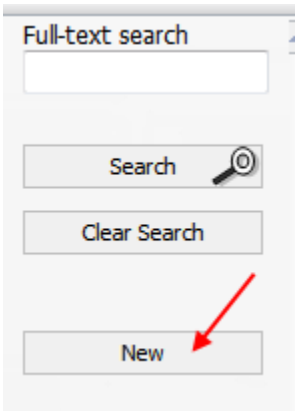
When the new, empty article comes up, you can write, paste or insert text, images, links or attachments. You can also use all the other Outlook tools, like format text and spelling check.

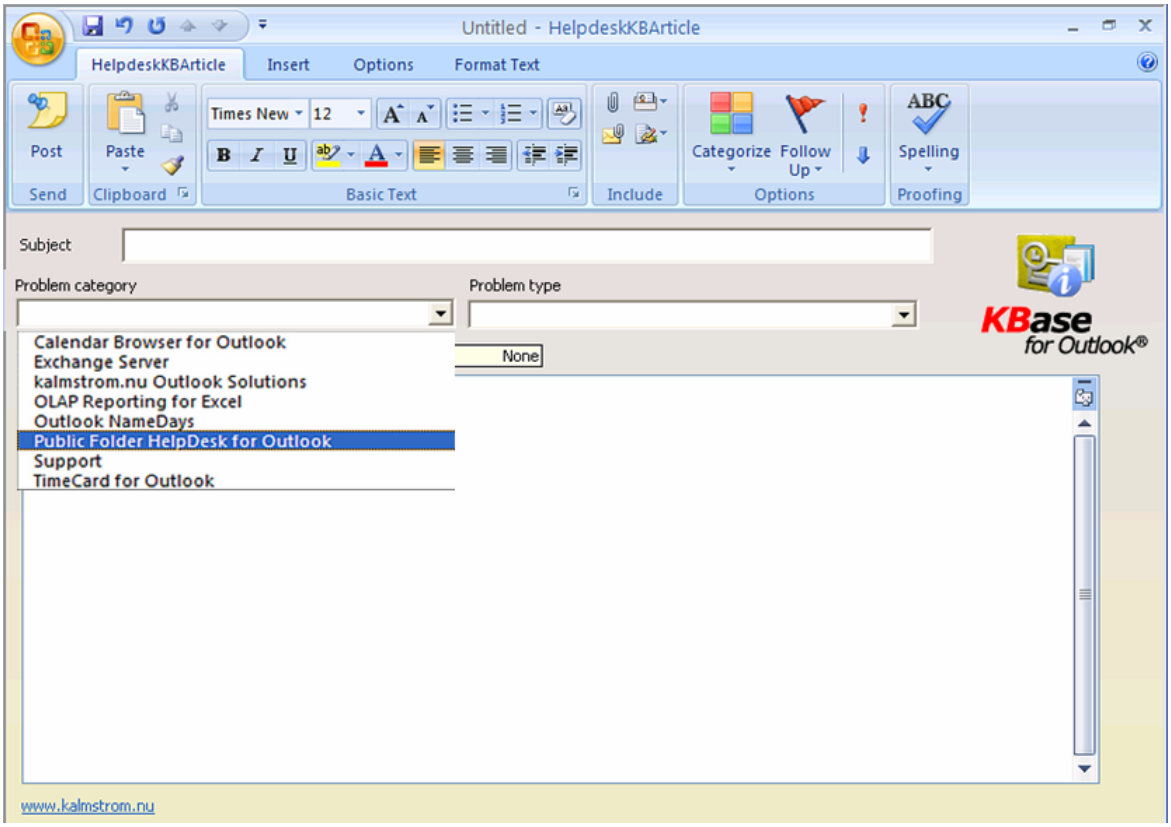
The two "Created by" fields are filled out automatically with your name and date when the ticket is posted.

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 Post and it will be saved in .rtf format.





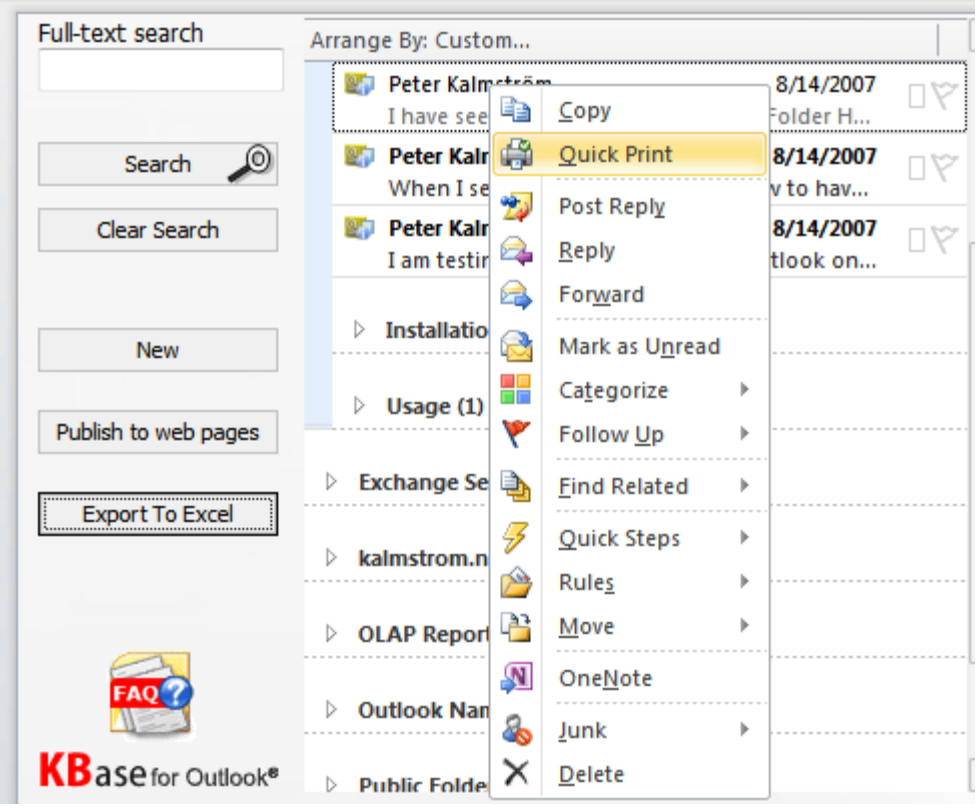
3.2 EDIT ARTICLE

- 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

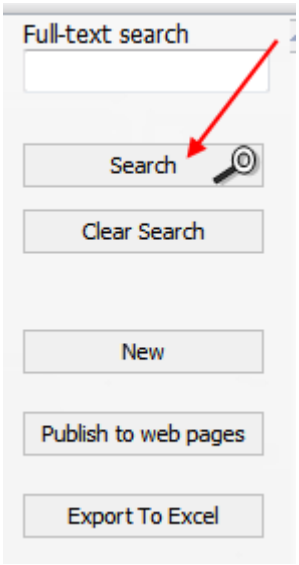
To print an article, right click it and select Print.



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.

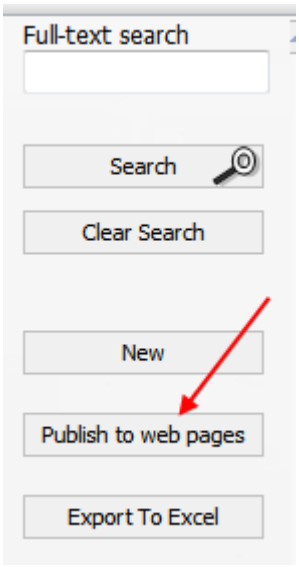


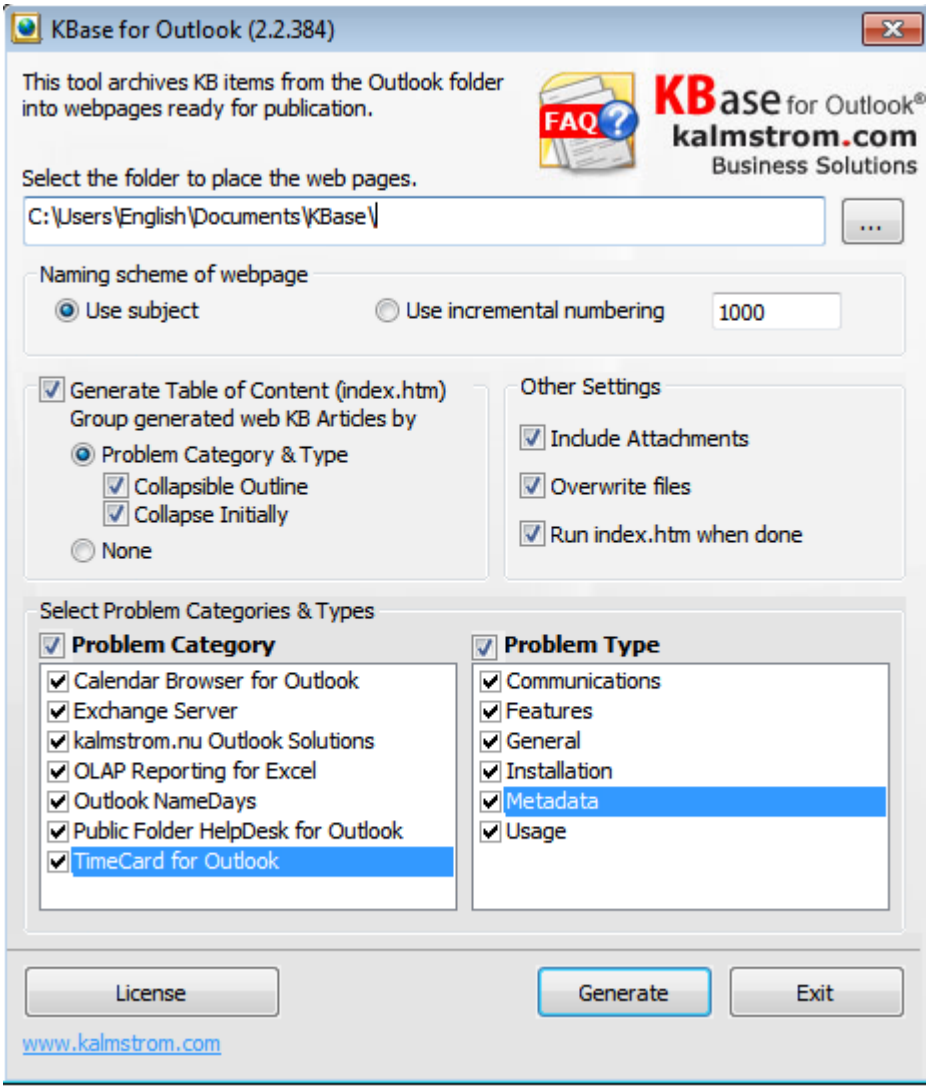
3.5 SAVE ARTICLES AS WEB PAGES

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.

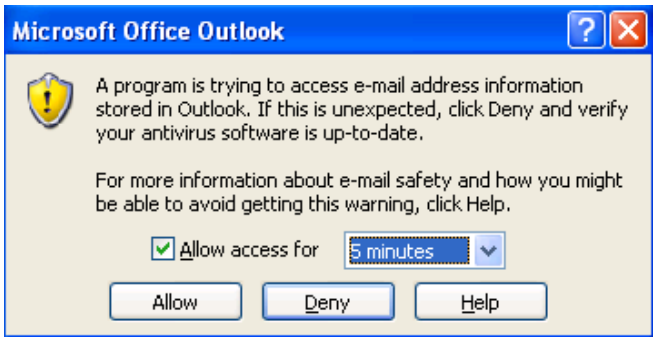
A table of content can be generated automatically, and there articles can be grouped by Problem category and type and with a collapsible outline.

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

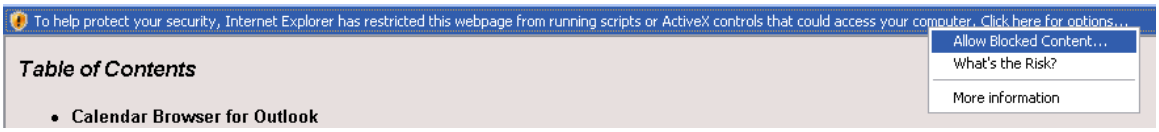



KBase for Outlook (2.2.384)
This tool archives KB items from the Outlook folder into webpages ready for publication.
KBase for Outlook®
kalmstrom.com
Business Solutions
Select the folder to place the web pages.
C:\Users\English\Documents\KBase\
...
Naming scheme of webpage
Use subject
Use incremental 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
Calendar Browser for Outlook
Exchange Server
kalmstrom.nu Outlook Solutions
OLAP Reporting for Excel
Outlook NameDays
Public Folder HelpDesk for Outlook
TimeCard for Outlook
Problem Type
Communications
Features
General
Installation
Metadata
Usage
License
Generate
Exit
www.kalmstrom.com

When you have clicked Generate, Outlook might give a warning message. In that case you have to allow access to be able to save *KBase* articles as web pages.



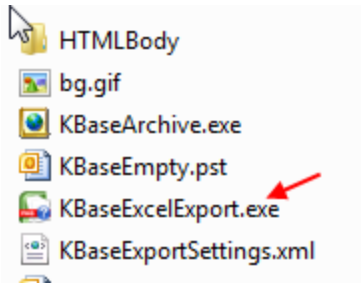
When the web pages are generated, Internet Explorer may give you a warning too. In that case you must allow blocked content to be able to expand and collapse problem categories and types. Only Internet Explorer allows the collapsing and expanding.

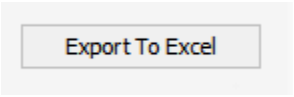


KBase Archive Tool imports attachments and inline images while generating *KBase* web pages. Those attachments are placed in sub-folders. Image attachments such as BMP are automatically converted to JPEG, to make it compatible for web browser as well as to decrease the rather large size of the bitmap.

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.

3.6 EXPORT TO EXCEL



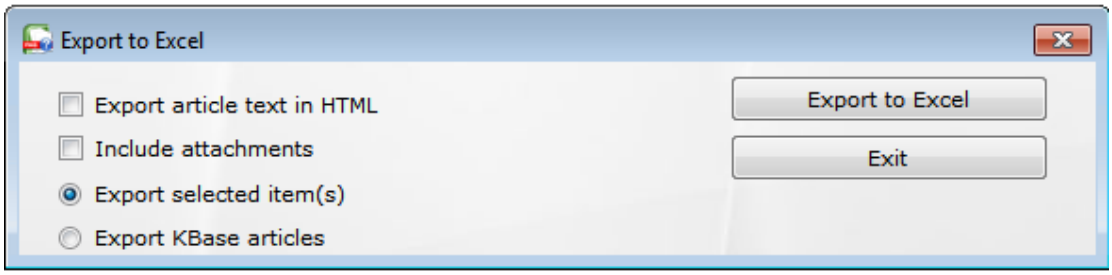


To export *KBase* articles to an Excel datasheet, use the button in the *KBase* homepage or run the file KBaseExcelExport.exe in the *KBase* installation folder. Open the *KBase* folder in Outlook before you run the file. You may select some articles in *KBase* or export them by other criteria, see below.

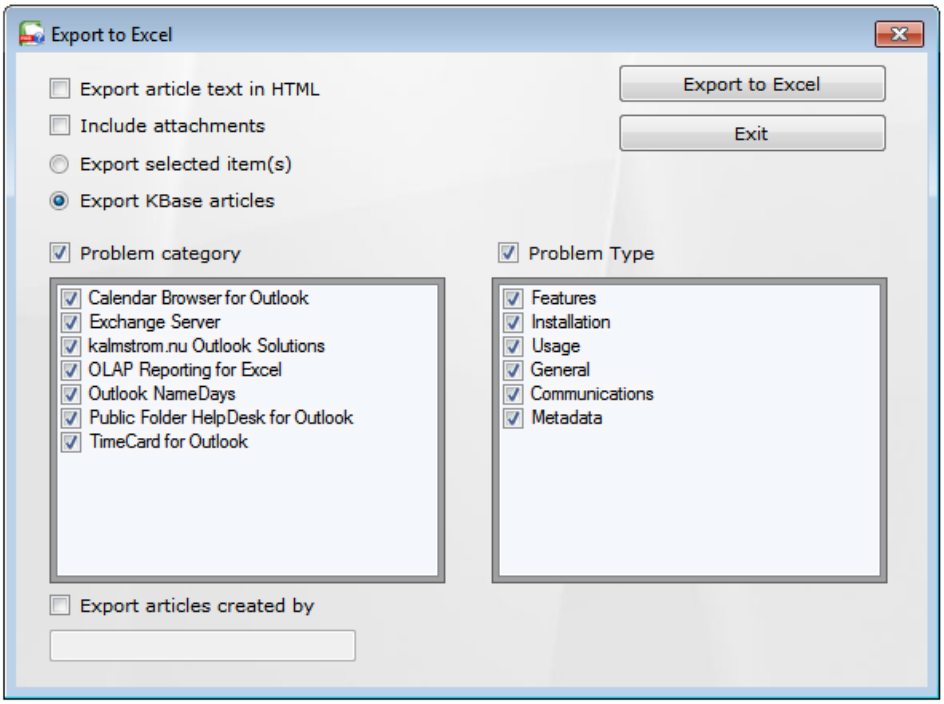
(With this tool you may also export items from other Outlook folders to Excel. Just select the items you wish to export and run the file.)

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.

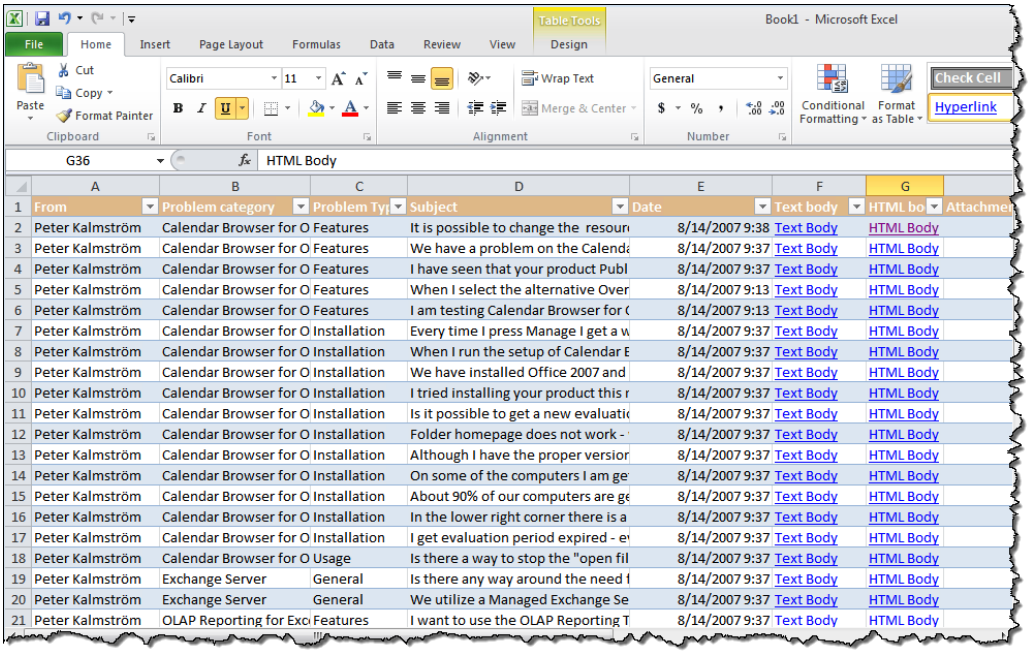
This is the default screen and choice. When you have made your own choice *KBase* will remember it in the file KBaseExportSettings.xml and show it the next time you want to export to Excel.



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.



This is how the Excel report might look.



	From	Problem category	Problem Ty	Subject	Date	Text body	HTML bo	Attachmer
2	Peter Kalmström	Calendar Browser for O	Features	It is possible to change the resour	8/14/2007 9:38	Text Body	HTML Body	
3	Peter Kalmström	Calendar Browser for O	Features	We have a problem on the Calenda	8/14/2007 9:37	Text Body	HTML Body	
4	Peter Kalmström	Calendar Browser for O	Features	I have seen that your product Publ	8/14/2007 9:37	Text Body	HTML Body	
5	Peter Kalmström	Calendar Browser for O	Features	When I select the alternative Over	8/14/2007 9:13	Text Body	HTML Body	
6	Peter Kalmström	Calendar Browser for O	Features	I am testing Calendar Browser for (	8/14/2007 9:13	Text Body	HTML Body	
7	Peter Kalmström	Calendar Browser for O	Installation	Every time I press Manage I get a w	8/14/2007 9:37	Text Body	HTML Body	
8	Peter Kalmström	Calendar Browser for O	Installation	When I run the setup of Calendar E	8/14/2007 9:37	Text Body	HTML Body	
9	Peter Kalmström	Calendar Browser for O	Installation	We have installed Office 2007 and	8/14/2007 9:37	Text Body	HTML Body	
10	Peter Kalmström	Calendar Browser for O	Installation	I tried installing your product this r	8/14/2007 9:37	Text Body	HTML Body	
11	Peter Kalmström	Calendar Browser for O	Installation	Is it possible to get a new evaluatic	8/14/2007 9:37	Text Body	HTML Body	
12	Peter Kalmström	Calendar Browser for O	Installation	Folder homepage does not work -	8/14/2007 9:37	Text Body	HTML Body	
13	Peter Kalmström	Calendar Browser for O	Installation	Although I have the proper versior	8/14/2007 9:37	Text Body	HTML Body	
14	Peter Kalmström	Calendar Browser for O	Installation	On some of the computers I am ge	8/14/2007 9:37	Text Body	HTML Body	
15	Peter Kalmström	Calendar Browser for O	Installation	About 90% of our computers are ge	8/14/2007 9:37	Text Body	HTML Body	
16	Peter Kalmström	Calendar Browser for O	Installation	In the lower right corner there is a	8/14/2007 9:37	Text Body	HTML Body	
17	Peter Kalmström	Calendar Browser for O	Installation	I get evaluation period expired - e	8/14/2007 9:37	Text Body	HTML Body	
18	Peter Kalmström	Calendar Browser for O	Usage	Is there a way to stop the "open fil	8/14/2007 9:37	Text Body	HTML Body	
19	Peter Kalmström	Exchange Server	General	Is there any way around the need f	8/14/2007 9:37	Text Body	HTML Body	
20	Peter Kalmström	Exchange Server	General	We utilize a Managed Exchange Se	8/14/2007 9:37	Text Body	HTML Body	
21	Peter Kalmström	OLAP Reporting for Exc	Features	I want to use the OLAP Reporting T	8/14/2007 9:37	Text Body	HTML Body	

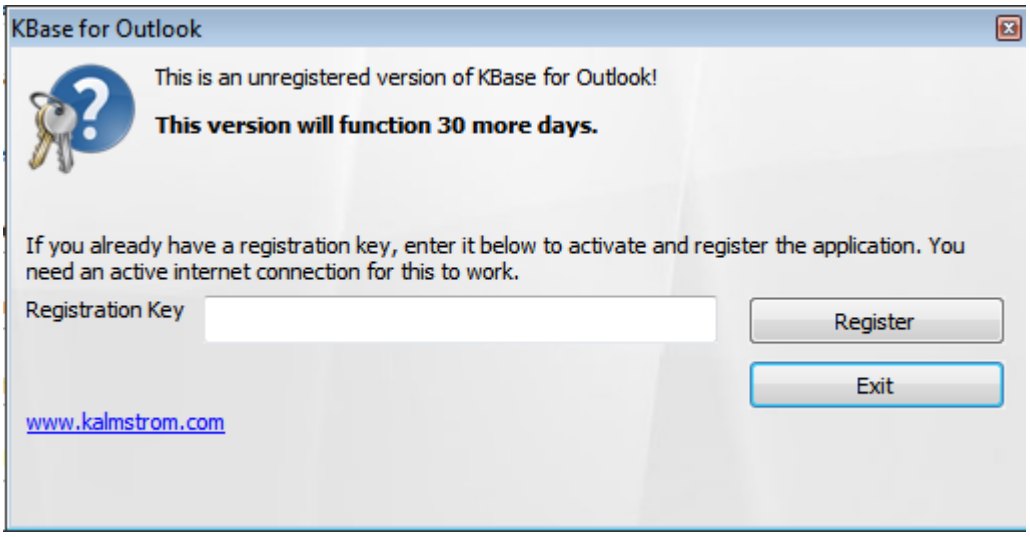
4 REGISTRATION AND TRIAL INFO

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 *KBase* Purchase page. 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 kalmstrom.com Community, you may use *KBase* without any extra costs. Just contact the kalmstrom.com Sales department at sales@kalmstrom.com and ask for a registration key, and we will send it to you promptly.



5 SUPPORT

Three months of the kalmstrom.com Single Support 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	support@kalmstrom.nu	– 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.