



OBT
IA CHATBOT

OBT AI Chatbot

AI Assistant for SharePoint

User Manual

Version 2.1 · June 2026

OBTechnologies

Part of OBT Intelligence Suite

Product documentation

1. Introduction

OBT AI Chatbot is an artificial intelligence tool integrated into SharePoint that lets you ask questions in natural language and get answers based on your company's documents. It works from any SharePoint page where it has been installed.

2. Available plans

The chatbot is available in three plans with different features:

- **Basic:** Claude Haiku 4.5, with your own API key. Limited RAG. To get started.
- **Premium:** Claude Sonnet 4.6, secure proxy and RAG over your documents. For production.
- **Enterprise:** Like Premium, with expanded RAG, more tokens, 99.9% SLA and 24/7 support.

3. How to use the chatbot

3.1. Sending a message

- Type your question in the text field at the bottom.
- Press Enter or the send button.
- Wait for the answer (you will see a typing animation).
- You can ask follow-up questions; the chatbot remembers the context.

3.2. Document search (RAG)

If your plan includes RAG (Premium or Enterprise), the chatbot automatically searches the configured SharePoint documents and lists to enrich its answers with your company's data.

NOTE If you are on Basic and see a notice that RAG is unavailable, contact your administrator to upgrade.

3.3. Clearing the conversation

Use the trash icon in the top right corner of the chat to clear the history and start over.

4. WebPart configuration

A SharePoint editor or administrator can configure the chatbot from the property pane:

- **AI:** Claude API key (Basic only), model selection and system prompt.
- **RAG:** SharePoint libraries/lists to query and the maximum number of documents.
- **Customization:** title, placeholder, chat size, typing speed, logo and colors.
- **License:** license key and validation server URL.

5. Interface indicators

5.1. Plan badge

In the chat header, next to the title, a label shows your current plan: Basic, Premium or Enterprise.

5.2. Token counter

On Premium and Enterprise, the chat footer shows the month's token consumption against your limit.

6. Troubleshooting

- **“Site not authorized”**: the site is not in your license; notify your administrator.
- **“Invalid or expired license”**: contact your administrator to renew.
- **RAG unavailable**: your plan (Basic) does not include RAG; upgrade to Premium or Enterprise.
- **No response**: check your connection and try again; if it persists, email soporte@obtechnologies.com.

7. Contact

Support: soporte@obtechnologies.com · Web: <https://www.obtechnologies.com>

8. What's new — July 2, 2026

8.1. Download responses as Excel

When you ask for data in table form, the assistant will offer to download it as Excel. Just type things like "give me a list of...", "make a table of...", "in excel format" or "comparison chart". You'll see a preview of the first rows and a download button. The file is created in your own browser.

8.2. Download responses as Word or PDF

Likewise, if you ask for "a report", "a document" or "a word", the assistant will generate a Word file with a (blue) download button. If you add "as pdf", it will generate a PDF (red button). The word you use wins: if you explicitly ask for a table, Excel takes precedence.

8.3. Questions about entire lists

The assistant can now analyze a full SharePoint list, not just a few items, and answer questions about all of its content. If your administrator has enabled it, it can also read the attachments of list items. How much information it can process depends on your plan (Basic, Premium or Enterprise).