

Team Knowledgebase for Outlook

Admin Installation and Configuration (**'Per User Installation' and 'Per Machine Installation'**)

Team Knowledgebase consists of two separate installs – **Admin** and **User**. The admin installation is to be done by the manager to configure the team specific KB settings such as defining drop down lists, choosing destination KB Folders where KB articles are stored.

Note for Admins: *The admin portion of the install already consists of the User add-in too, so you don't need to install the User tool separately on your machine.*

For **'Per User Installation'** (*ideal for standalone single user/workstation*)

TeamKnowledgebaseSetups_x86.zip (for 32-bit Outlook 2010, 2013, 2016, 2019)

TeamKnowledgebaseSetups_x64.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

For **'Per Machine Installation'** (*ideal for installing on Citrix and Terminal Servers*)

TeamKnowledgebaseSetups_x86_Citrix.zip (for 32-bit Outlook 2010, 2013, 2016, 2019)

TeamKnowledgebaseSetups_x64_Citrix.zip (for 64-bit Outlook 2010, 2013, 2016, 2019)

The downloaded zip file contains 3 files – *TeamKBAdminSetup_xXX.exe*, *TeamKBUserSetup_xXX.exe* and *VersionInfo.txt* where 'xXX' can be either x86 (32-bit Outlook) or x64 (64-bit Outlook)

Extract these file contents to a file folder. It is recommended that you place these setups files on a shared network folder, such that all users can have access to it, and ease the installation and upgrade process.

NOTE: 'Per User Installation' and 'Per Machine Installation'

In 'Per User Installation', the Team KB Admin install is performed 100% on the local system and nothing is installed on your Exchange or Windows Server. Further, this install is intended to serve only the current logged on user of the system/workstation and will be installed under the user's application data folder (instead of Programs Files folder) and no elevated permission is required. So, there won't be a prompt from UAC to allow this install unless you change the install directory to say, Programs Files which will warrant an elevated permission/UAC prompt. If the same system is used by multiple users, each user needs to install Team KB add-in on their profile with the default installation folder location.

'Per Machine Installation': If you have the need to have a single install that serves all users of the system (i.e., the files will be installed under Program files folder and the add-in will be registered under HKEY_LOCAL_MACHINE registry hive rather than HKEY_CURRENT_USER), download the Citrix/Terminal Server version of the setups to perform a per machine installation.

Requirements:

- .NET framework 4.6 or above
- Outlook 2010, 2013, 2016, 2019 (both 32-bit and 64-bit versions are supported).
- Team Knowledgebase requires a dedicated database to save the KB global settings and configurations. Supported databases are Microsoft SQL Server, Azure SQL Database and Microsoft Access.
 - All SQL Server versions are supported including Express edition. SQL server should be on the local office network accessible by all users.
 - For Microsoft Access database, a dedicated shared network folder, preferably a UNC path is required accessible to all users of Team KB.

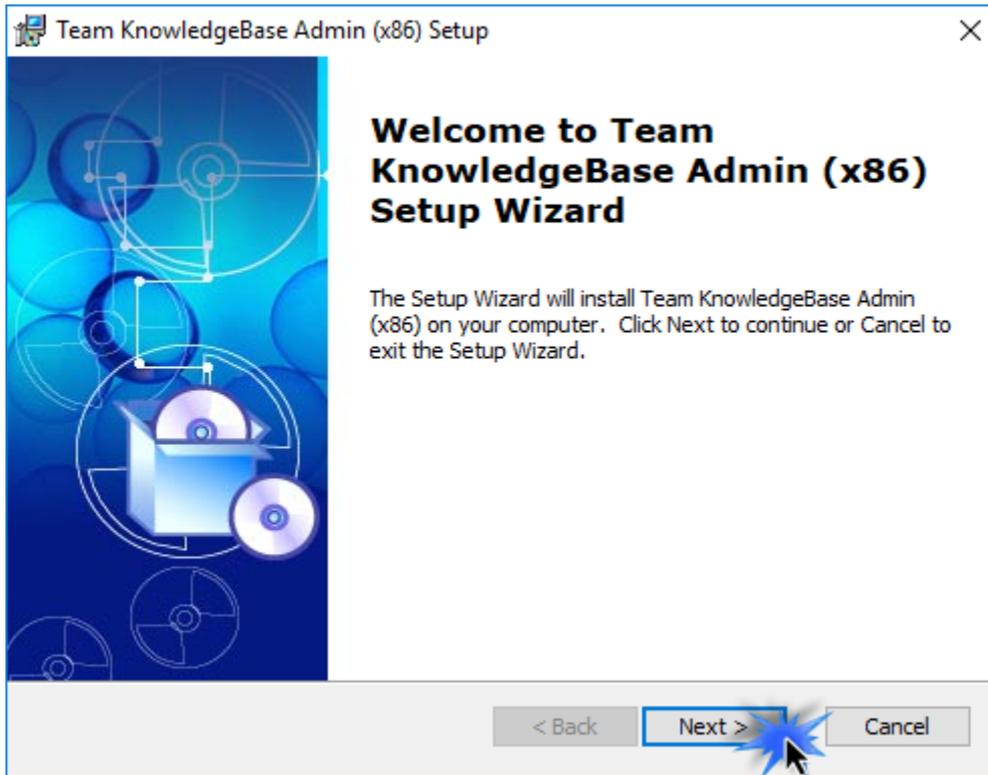
There are three (3) sections in Administrative installation:

- I) Files Installation, II) KB Database Configuration, III) Choose KB Folders

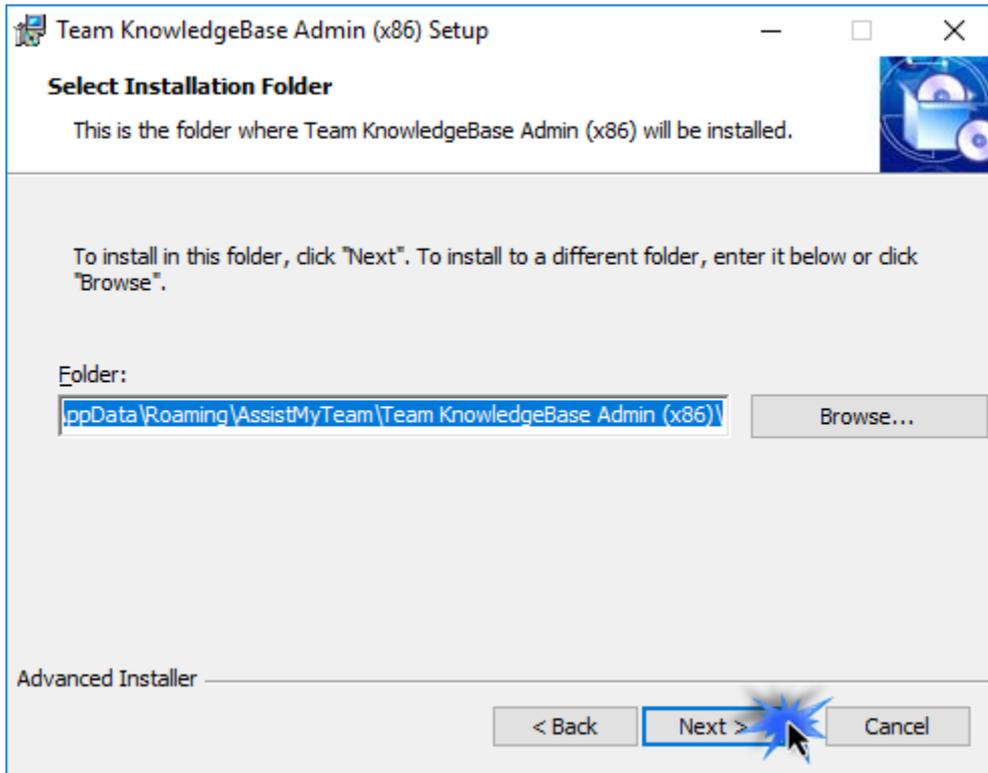
I) Files Installation

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Step 1. Run the *TeamKBAdminSetup_xXX.exe* to start the installation. Click 'Next' to Continue. If Outlook 2010 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.

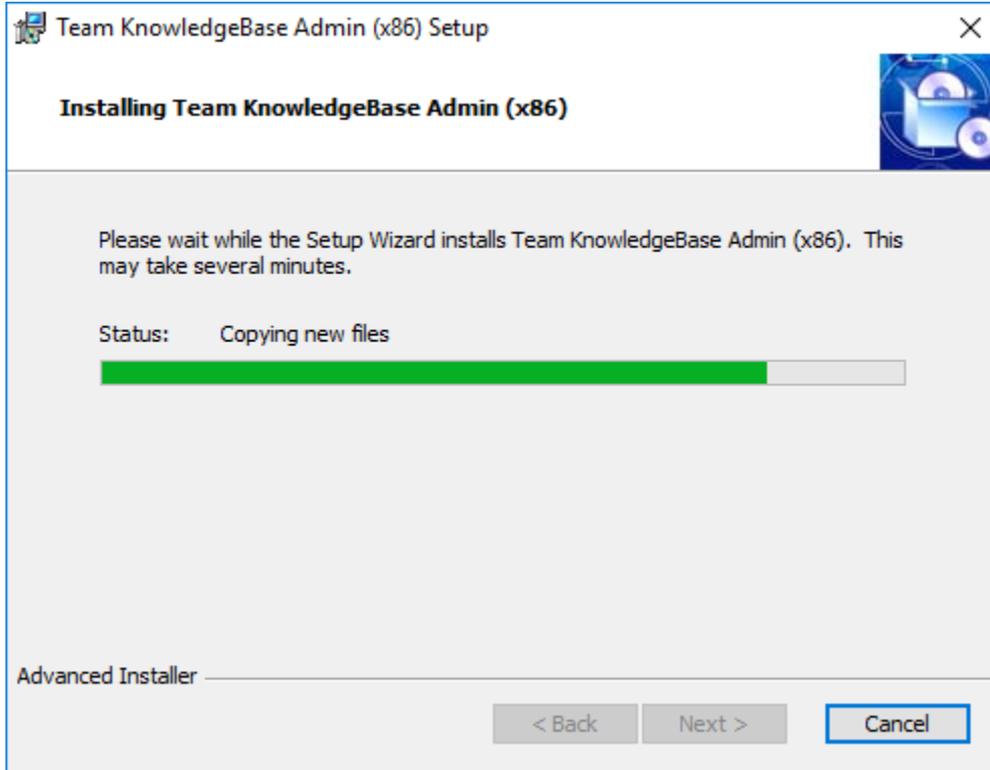


Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.

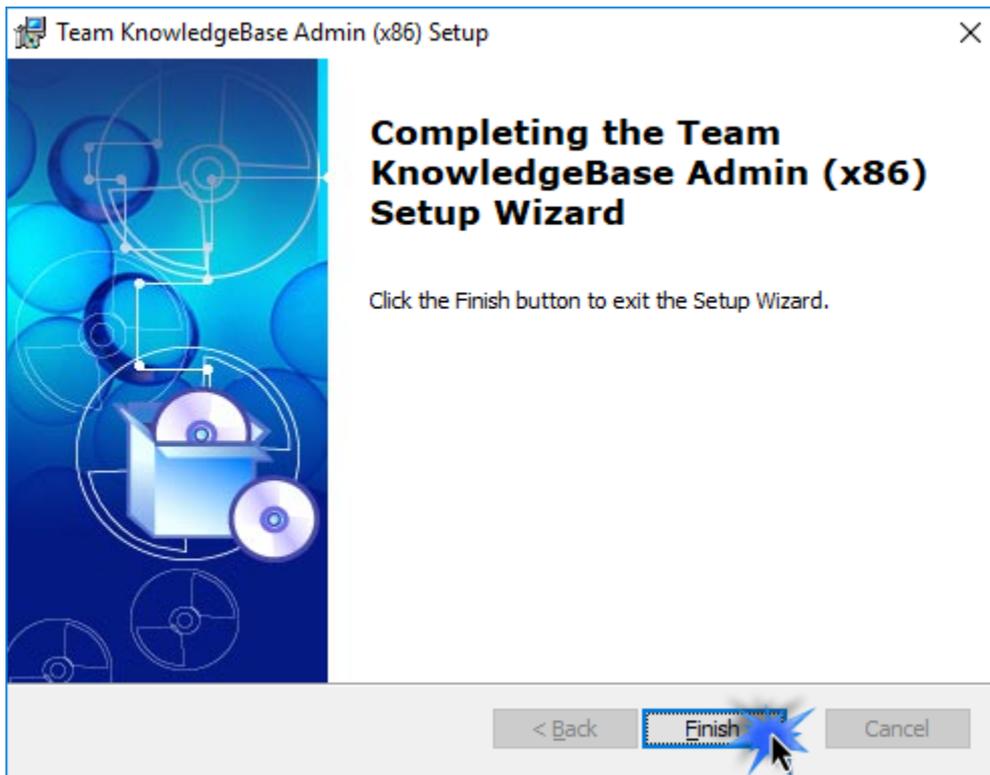


Step 3. It just takes a few minutes to complete the whole copying process

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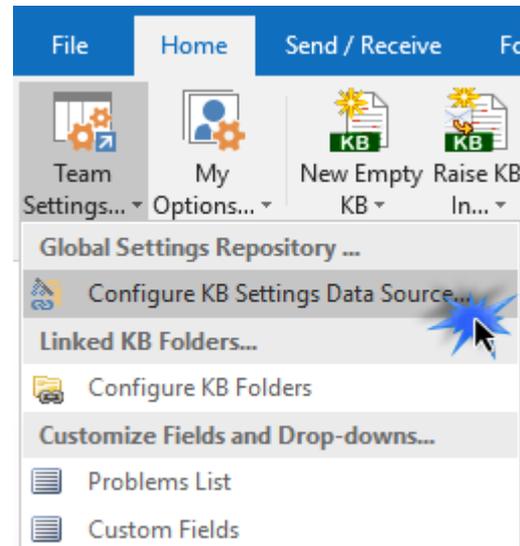
Step 4. Click 'Finish'. This ends the files installation process in your system.



Now start Microsoft Outlook. If the Team KB Admin add-in installation was successful, you will see a toolbar or ribbon with the title 'Team Knowledgebase' toolbar in Outlook.

II) KB Database Configurations

The next step is to choose a database option and configure it to store the KB metadata such as Problem Categories/Types lists, notification options, 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.

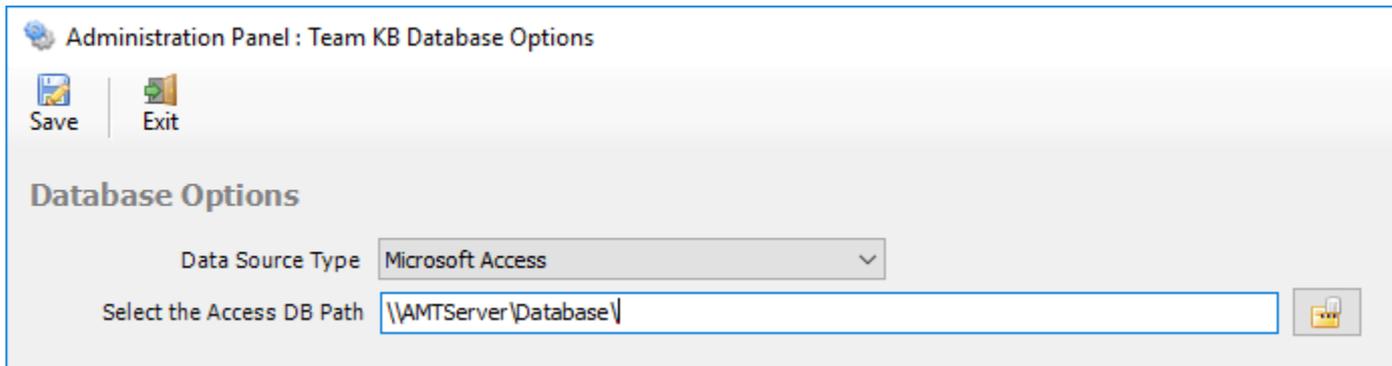


Start Outlook and you would be automatically prompted with the 'KB Settings Data Source...' panel.

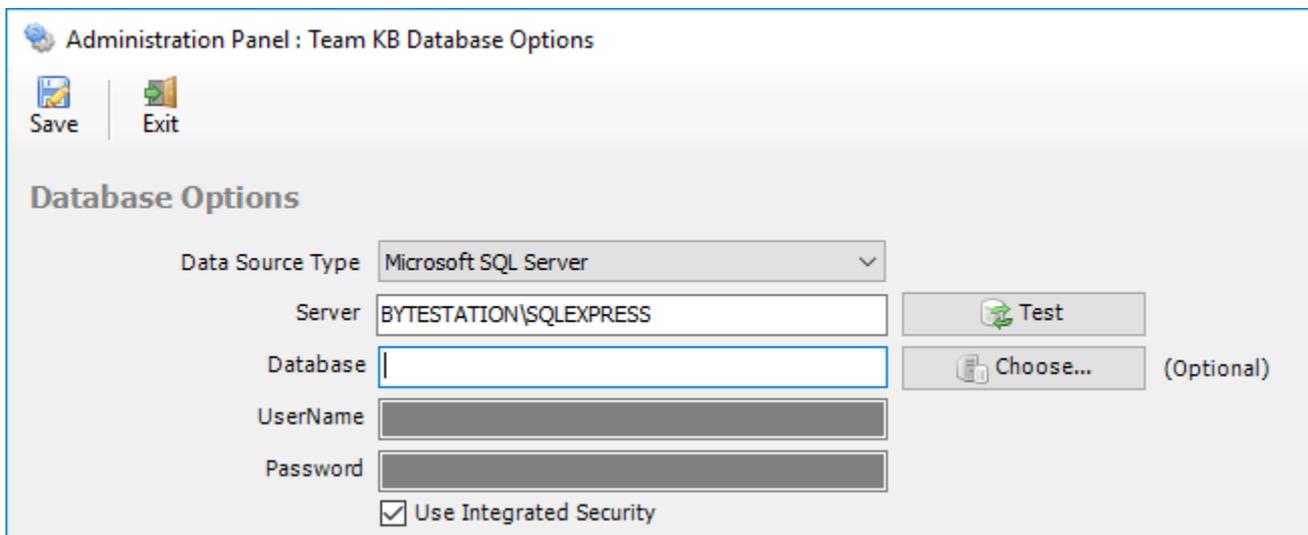
If it is not visible, you can invoke it from **Team Settings > Configure KB Settings Data Source...**

You can choose a KB database between a **Microsoft Access** (MDB file) to a **Microsoft SQL Server**, or **Azure SQL Database** (cloud DB).

i) Using Microsoft Access - If you choose 'Microsoft Access', the database file (e.g., *TeamKBSettings.MDB*) will need to be placed on a shared network folder such that all users (that have the Team KB add-in in their Outlook) have access to the network folder. When you specify the location where the MDB file is to be created, make sure you choose a UNC path (e.g. *\\AMTServer\Database*) instead of a mapped one because, a mapped drive might only be accessible to you. One important consideration with having a network Access database is the write permission on the folder and the MDB file itself. Make sure, the shared folder or the MDB file is not configured 'read-only' for all members on the network, otherwise, they won't be able to generate new KB articles from their respective Outlook.



ii) Using Microsoft SQL Server - It is recommended to use a dedicated SQL Server database option, if you have a high number of users (> 25) who will generate KB articles from their Outlook, as it gives a better performance and is easily scalable.



For SQL server, the server name is mandatory. The Database name is optional. If it is left empty, a new database with the name '*TeamKBSettingsDB*' would be created. If your SQL server is configured to use windows authentication (NTLM), then you can check the '**Use Integrity Security**' option to let Windows manager the

credentials to access the resources on the SQL server.

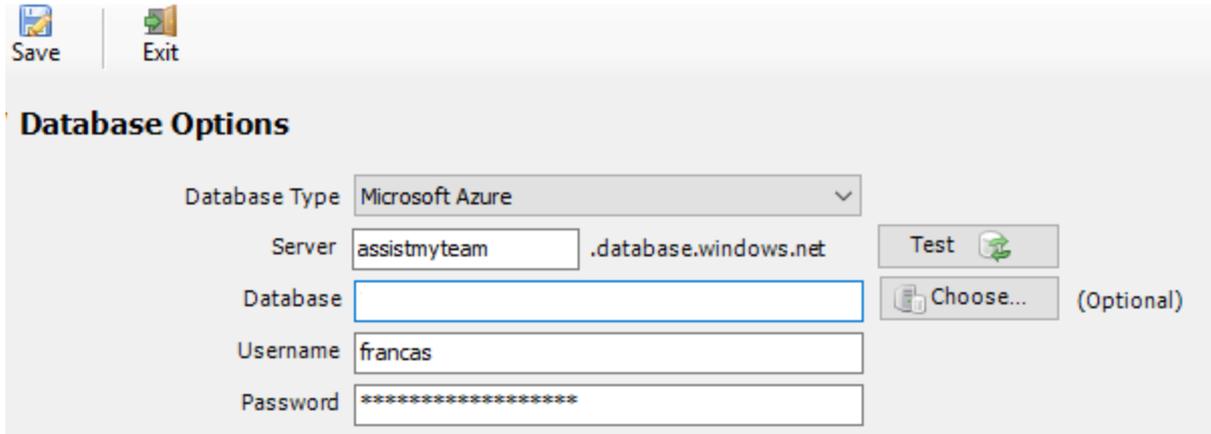
Using Cloud based SQL Server database

You can also use cloud-based SQL server service instead of on-premise such as Amazon RDS cloud service (They offer both free and paid accounts. For more, refer to <https://aws.amazon.com/rds/>). For instance, below is our test MS SQL account with Amazon RDS. Once you have signed up and created a MS SQL database, input the endpoint URL as server in our app. Make sure, you suffix the port number after the endpoint as “,1433” so that the full URL in the server name would be ‘XXXXXXXXXXXXXXXXXXXXXXXXXXXXX.rds.amazon.com,1433’.

And here is screenshot of the RDS server to use from the RDS member panel.

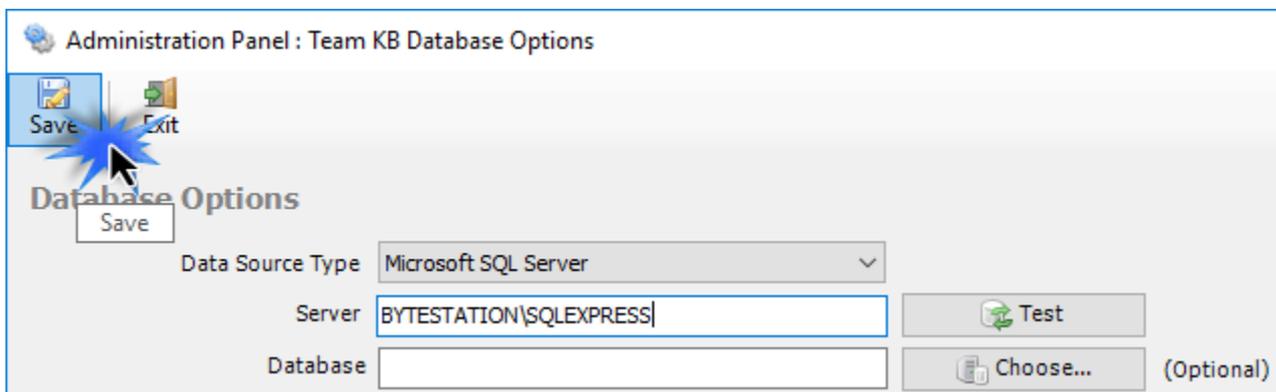
Permission for users on the SQL database - Each member should have both **db_datareader** and **db_datawriter** permission on the Team KB SQL database.

iii) **Using Microsoft Azure SQL** – Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database. This option is ideal for team that have users scattered or working remotely in different locations but have access to the web.



NOTE: If no database name is mentioned, the manager add-in will create a new database in your Azure SQL server, by the name of 'TeamKBSettingsDB'.

Once you click 'Save', the admin add-in tool will automatically create the chosen database (if it does not exist already). And then any KB settings and drop-down lists you defined in Team KB Admin add-in from Outlook would be saved in this repository, accessible to all users.



Next, install the Team KB Client add-in to the systems of your other staffs. You can install the Team KB Admin add-in on other systems as well if the particular user has the need to perform administrative tasks.

Make sure that you have provided the chosen database location information to all users who have or will install the Client tool (such as the network shared folder where the MDB file is located for Access database *e.g.* [\\AMTServer\Database](#) or the Server name in the case of SQL server database *e.g.* *BYTESTATION\SQLEXPRESS*). This is required because when user starts Outlook after installing Team KB Client add-in, it will prompt to specify the KB database location. And only then the add-in would automatically connect to the admin specified database to retrieve the KB logic and settings data to their respective local system.

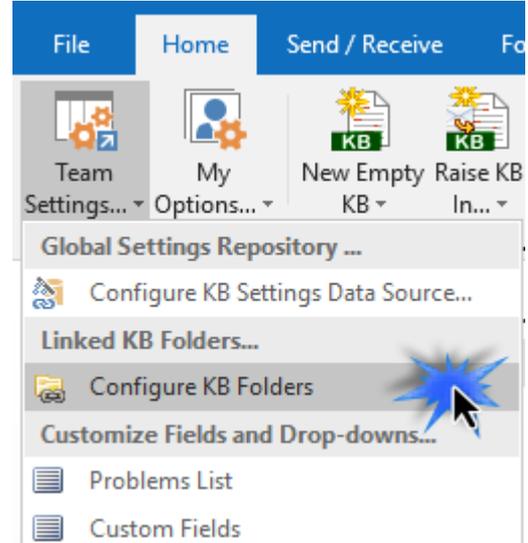
III) Choose KB Folders

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

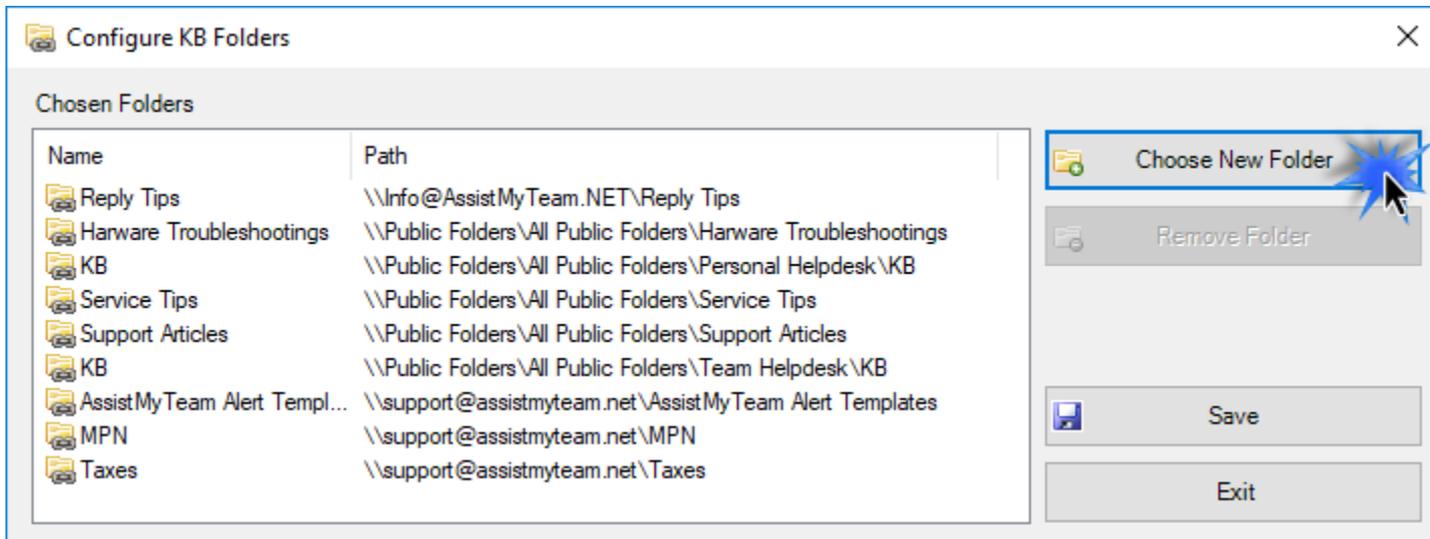
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Once linked, you and other users would be able to use KB articles from these folders in Outlook to reply to emails, as well as generate new KB articles in one of these linked KB folders using information and content from emails in Outlook.

To choose and configure a new KB folder, go to **Team Settings menu > 'Chosen KB Folders'**.



Here is a listing of all KB folders containing KB articles that are linked and chosen by the administrator using the Admin Add-in tool. All your users should have access to these chosen KB folders from their Outlook (i.e., individual user would be able to generate a KB from an email to one of these folders as well as use it to reply to emails in Outlook).

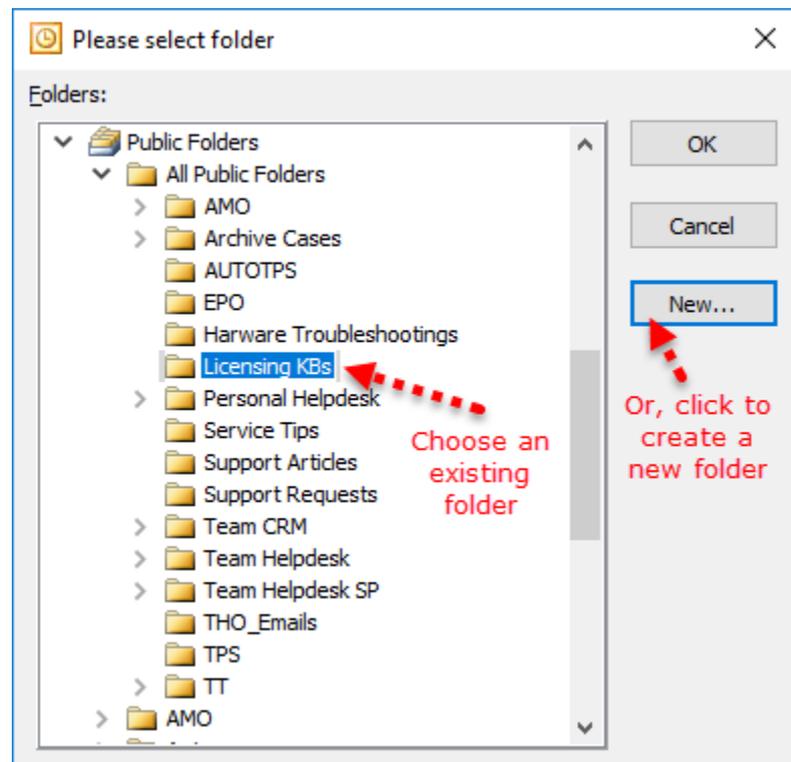


To choose and configure a new KB folder, click **'New Folder...'** button.

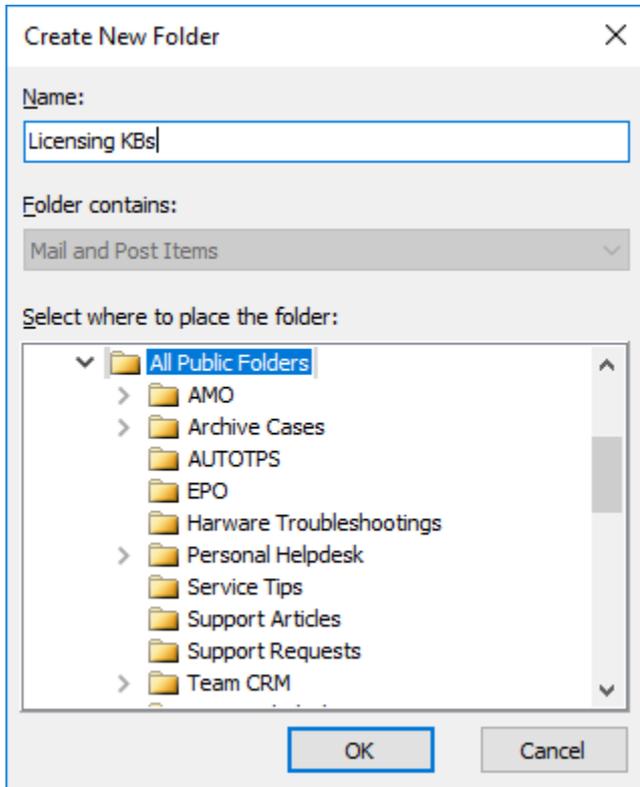
You will then be prompted to choose an existing folder or create a new one.

For others to have access to these KB folders, make sure you choose or create new folders that are accessible by all your staff members from their Outlook. i.e., the KB folder should either from a shared Exchange mailbox or an Exchange Public Folder.

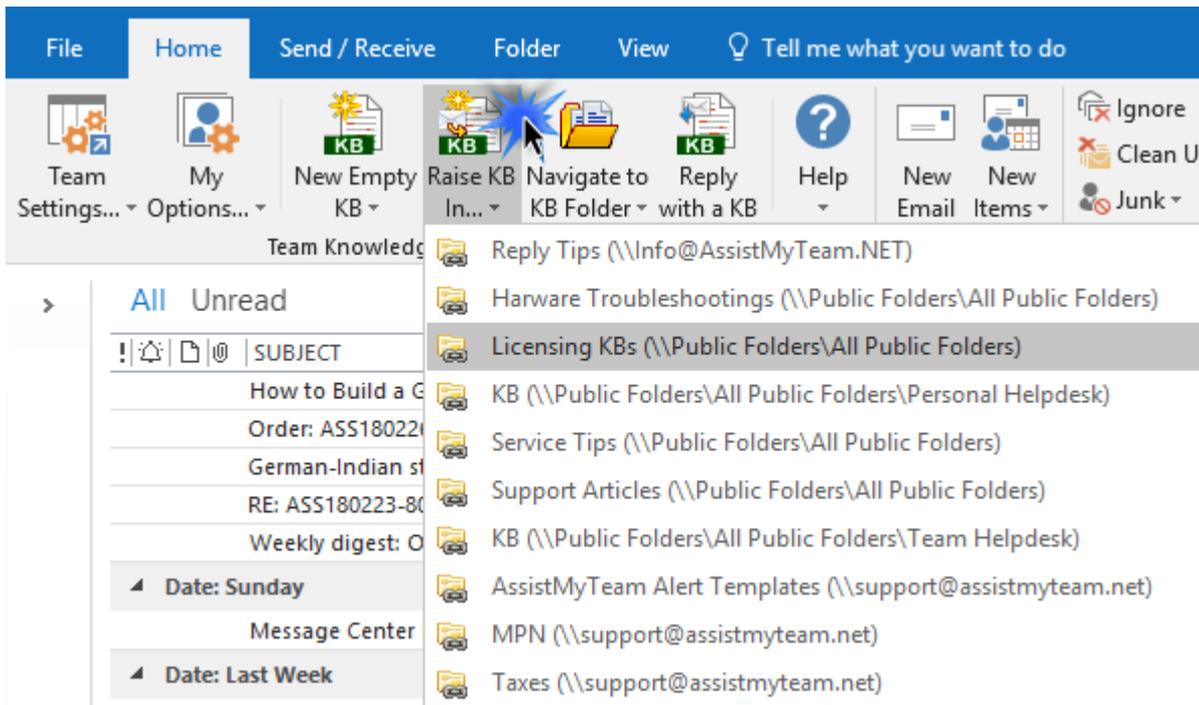
You can re-use existing KB Folders or create new ones for this purpose.



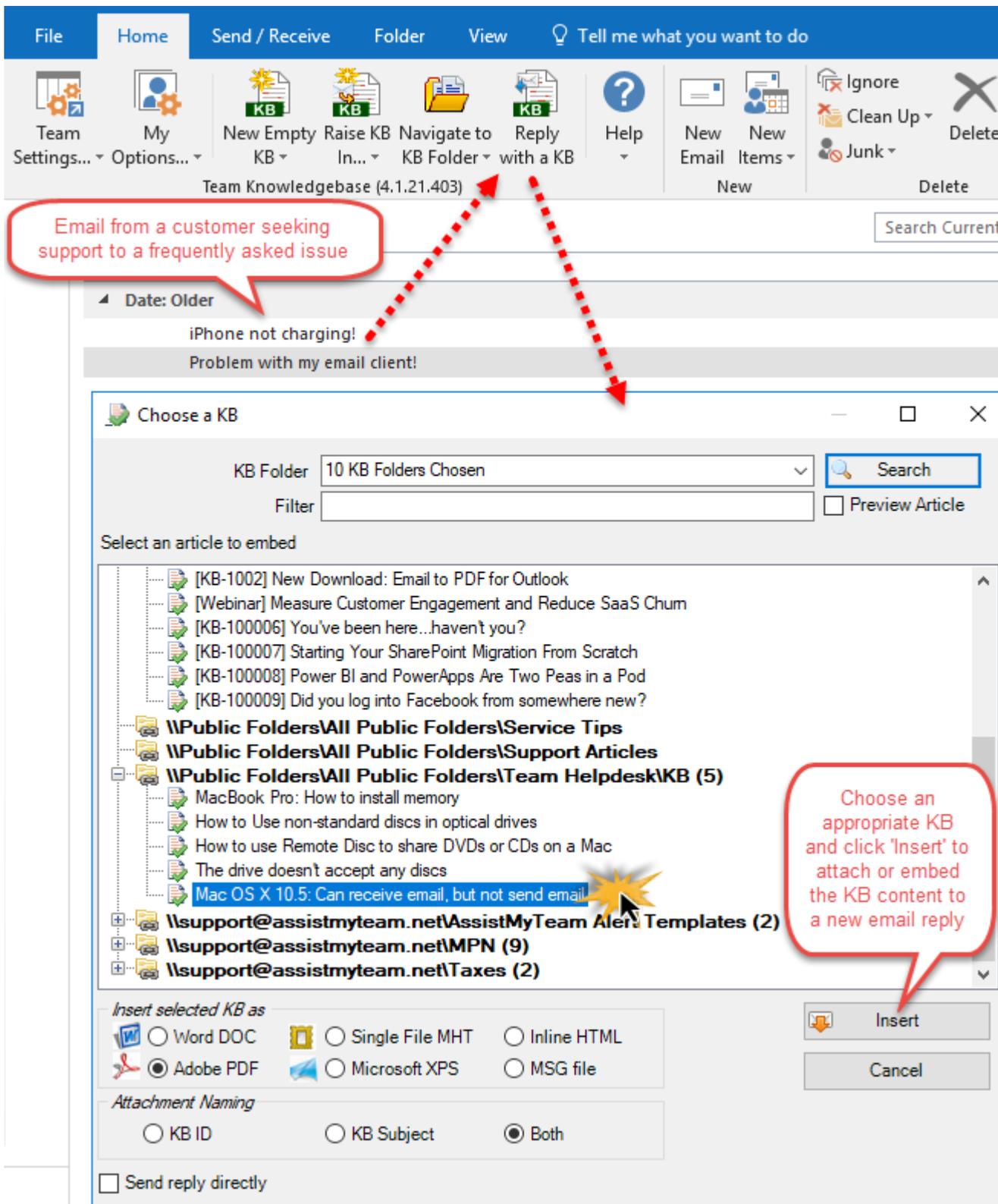
For instance, you can create a new folder (e.g., *Licensing KBs*):



If you have added multiple KB folders in Team KB Admin 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 KB folder to which a new KB will be raised from the selected email in Outlook.



Through the Team KB Admin console, you can choose any number of KB folders so that, your users can have a choice to choose a particular KB folder 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 KB folder to reply to an email in Outlook.



After these 3 steps, you can start installing the Team KB User add-in to the systems of your other staffs.

You can also install the Team KB Admin add-in on other systems as well if the particular user has the need to perform administrative tasks.

NOTE: There are other administrative configurations that you would need to undertake. These options are available in the 'Team Settings...' drop down menu of the Team KB toolbar or ribbon in Outlook.

For more references and helps on performing these administrative configurations, refer to the PDF Help Manual, which can be invoke from **the Team KB toolbar or ribbon > Help > Help Topics**.

You can also download the full PDF help manual directly from [this link](#).

---- End of Admin Install Guide