Team Knowledgebase for Outlook & SharePoint
User Installation and Configuration
(*'Per User Installation' and 'Per Machine Installation'*)

This install is meant for users who would be accessing KB articles in Outlook from SharePoint and reply to emails with the contents and attachments of the chosen KB article. Before you install the User tool, make sure your administrator has already configured the KB settings and configurations on a SharePoint site with the Team KB Admin tool. And take note of the SharePoint parent site URL which you will need to feed to the Team KB User Add-in once it is installed. This is required because you will be asked to specify the SharePoint site URL once you start Outlook (for the purpose of linking up the User add-in tool with the '*TeamKBSettings*' SharePoint list).

NOTE: 'Per User Installation' and 'Per Machine Installation'
In 'Per User Installation', the Team KB User 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).*
- Any SharePoint version starting with WSS 2.0 to the latest SharePoint 2019 including online/cloud SharePoint such as Office 365.

The Team KB User setup is of two different types - one each for 32-bit Outlook and 64-bit Outlook:

For **'Per User Installation'** *(ideal for standalone single user/workstation)*
TeamKBUserSPSetup_x86.exe *(for 32-bit Outlook 2010, 2013, 2016, 2019)*
TeamKBUserSPSetup_x64.exe *(for 64-bit Outlook 2010, 2013, 2016, 2019)*

For **'Per Machine Installation'** *(ideal for installing on Citrix and Terminal Servers)*
TeamKBUserSPSetup_x86_Citrix.exe *(for 32-bit Outlook 2010, 2013, 2016, 2019)*
TeamKBUserSPSetup_x64_Citrix.exe *(for 64-bit Outlook 2010, 2013, 2016, 2019)*

There are two sections in User installation:
I) **Files Installation,** II) **SharePoint Connection**

I) Files Installation

Step 1. Run *TeamKBUserSPSetup_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.
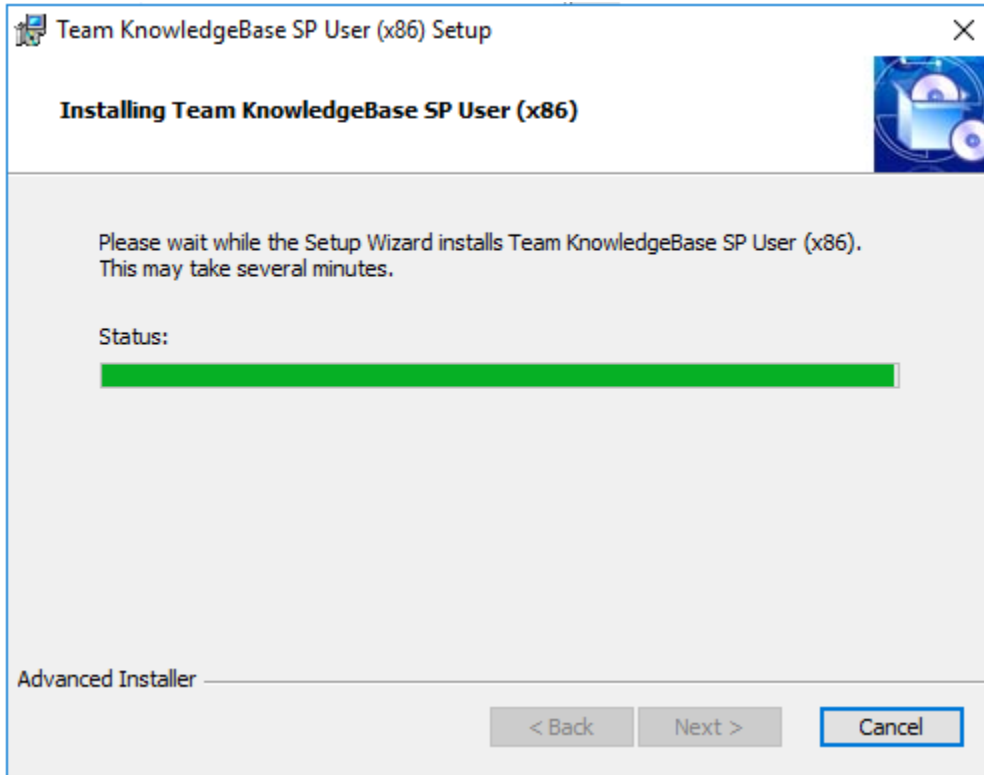
Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.
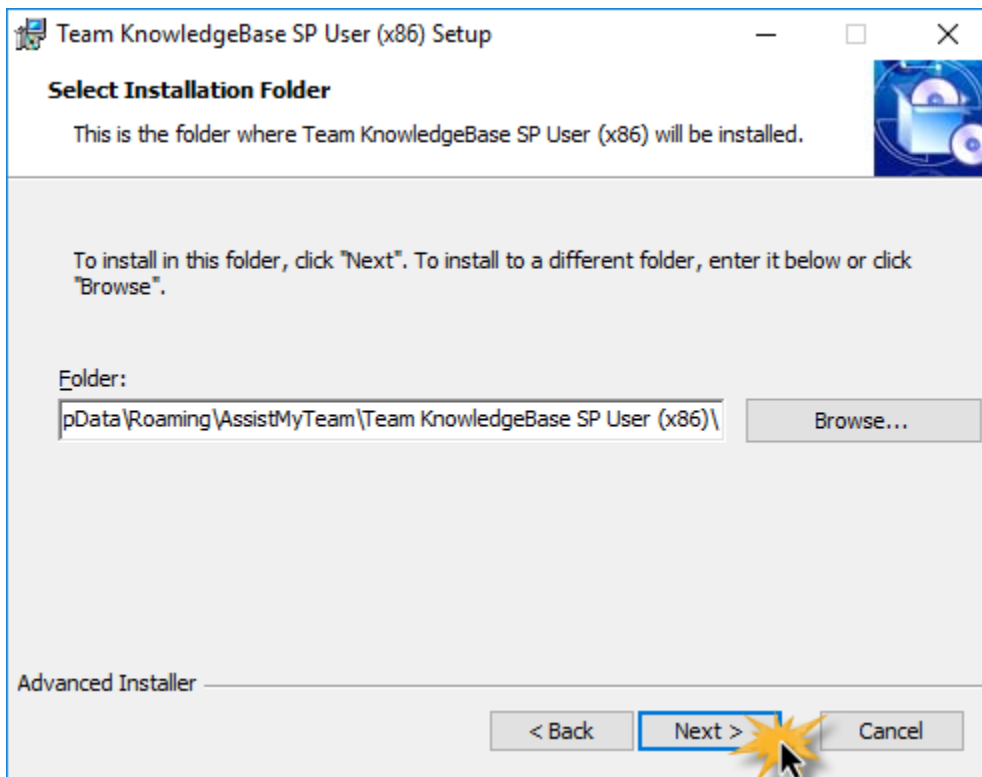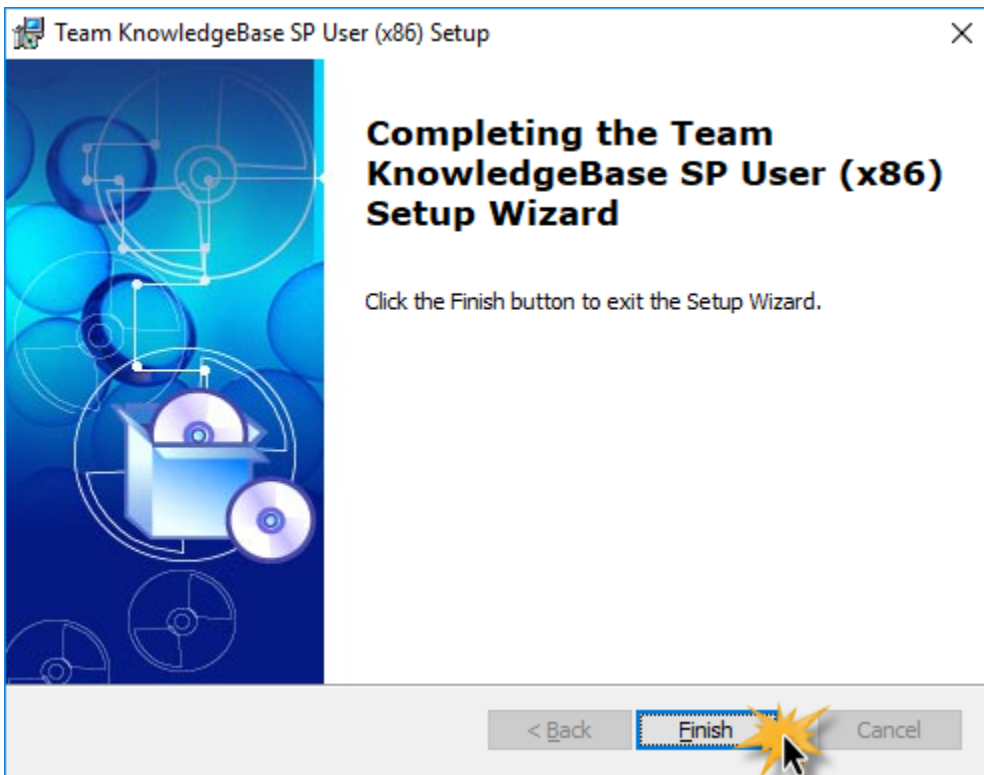
Step 3. It may take a few minutes to complete the whole copying and registration process.

**Step 4.** Click **'Finish'** to end the installation wizard.

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

II) SharePoint Connection.

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 KB administrator.

If the *'KB Data Source'* panel does not show up, you can invoke from **Outlook > Team KB toolbar > My Options > Configure KB Settings Data Source**…
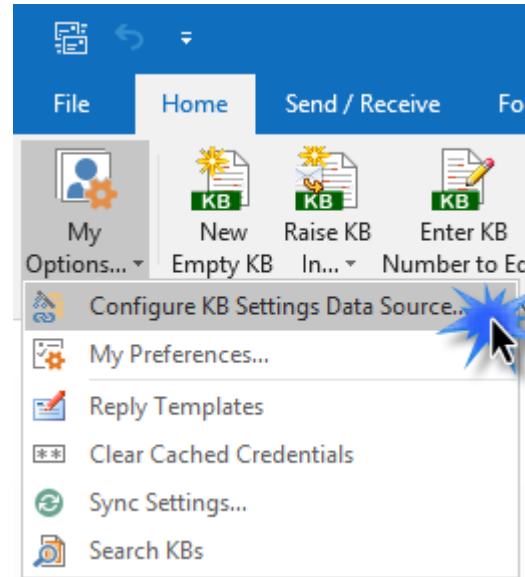
Click **'Browse…'** to specify the SharePoint site where the *'TeamKBSettings'* list is located.
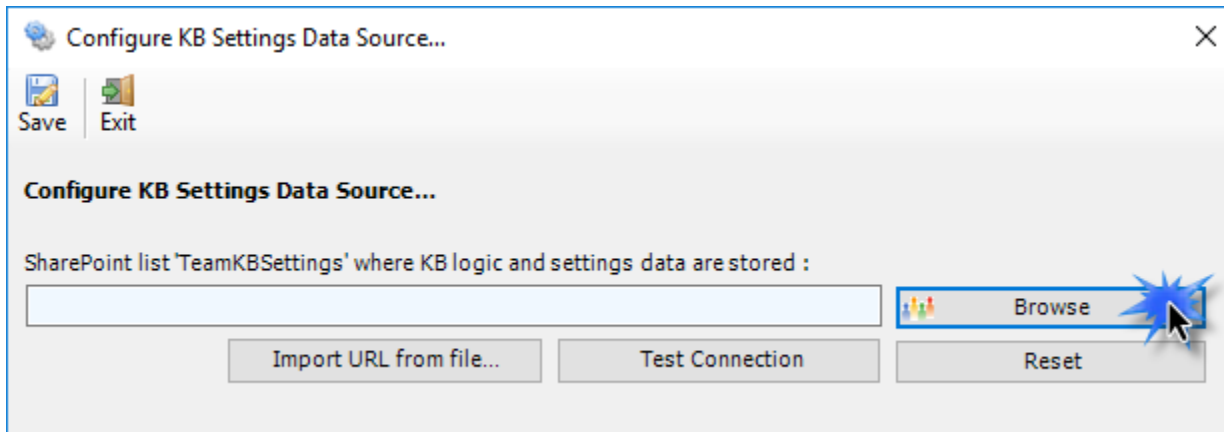
Enter the SharePoint URL site to show all available sub-sites and lists. If your KB administrator had already configured Team KB System with the admin tool, there would be a list *'TeamKBSettings'* that stores KB configurations including destination SharePoint lists and their corresponding mapping settings. Select that list to maintain a permanent link between the User add-in and the SharePoint KB data source.
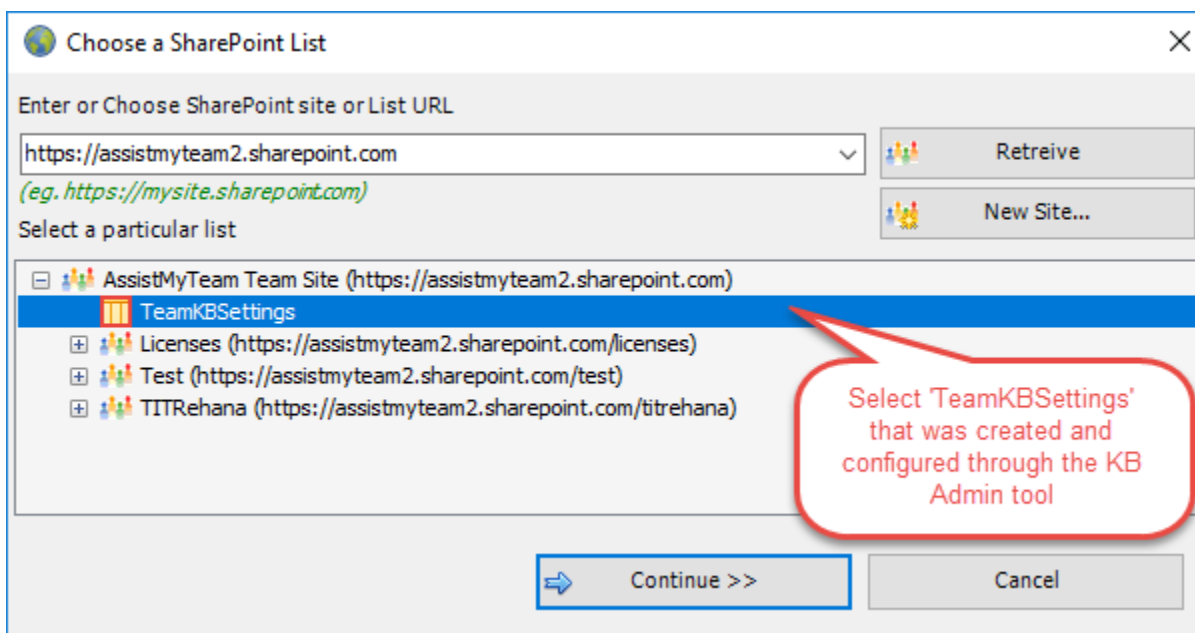

The SharePoint list chooser dialog box, where it shows all the available sub-sites and their lists displayed in hierarchical order.
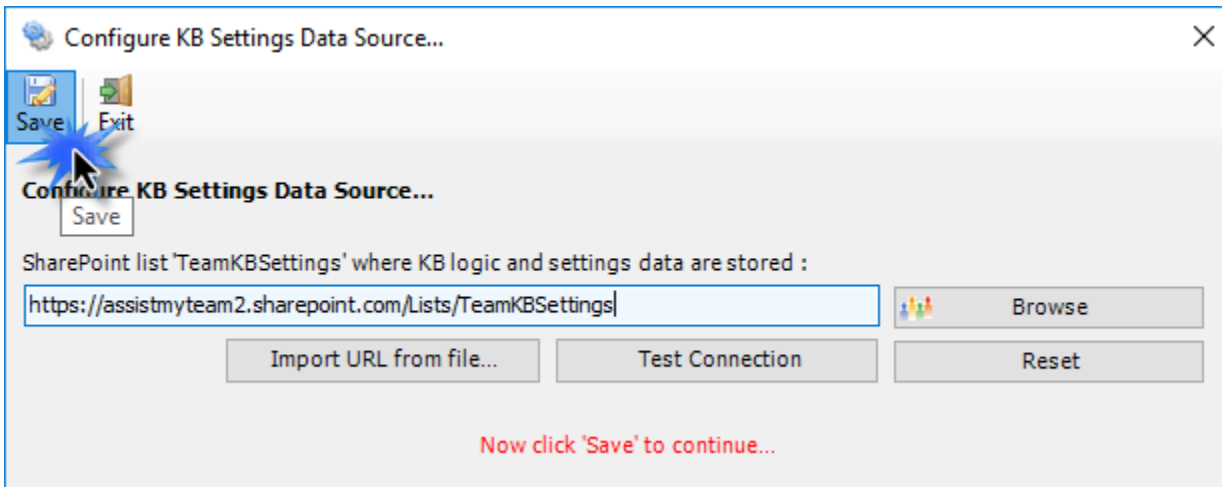
Now, click the Save button, to confirm the connection. Team KB User add-in is now ready to access KB articles stored in your SharePoint lists from within Microsoft Outlook for the purpose of replying emails with the contents and attachments of a chosen KB article.

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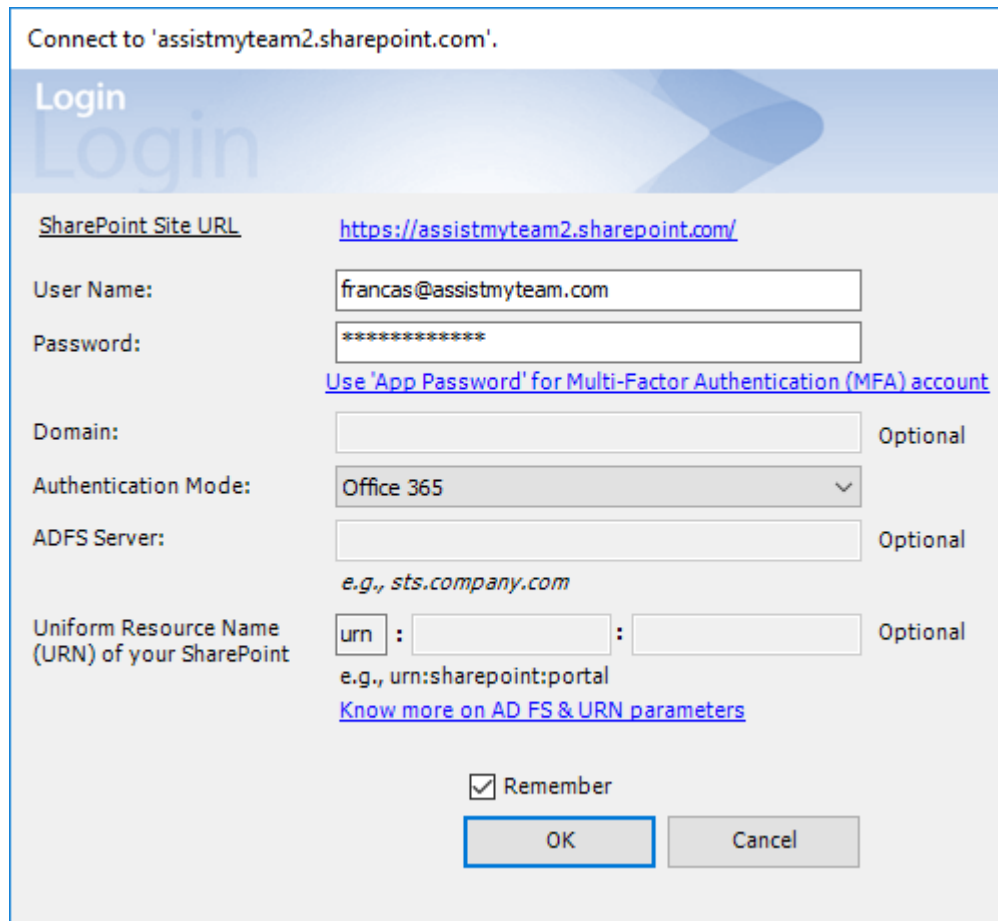
However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you to enter your credential.

Check **'Remember'** so that Team KB user 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

And when users with Team KB add-in starts Outlook, the add-in would automatically connect to the admin specified SharePoint site and would retrieve the KB logic and settings data to the local system.

What SharePoint permissions are required for KB Users?

All 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.

You now 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.
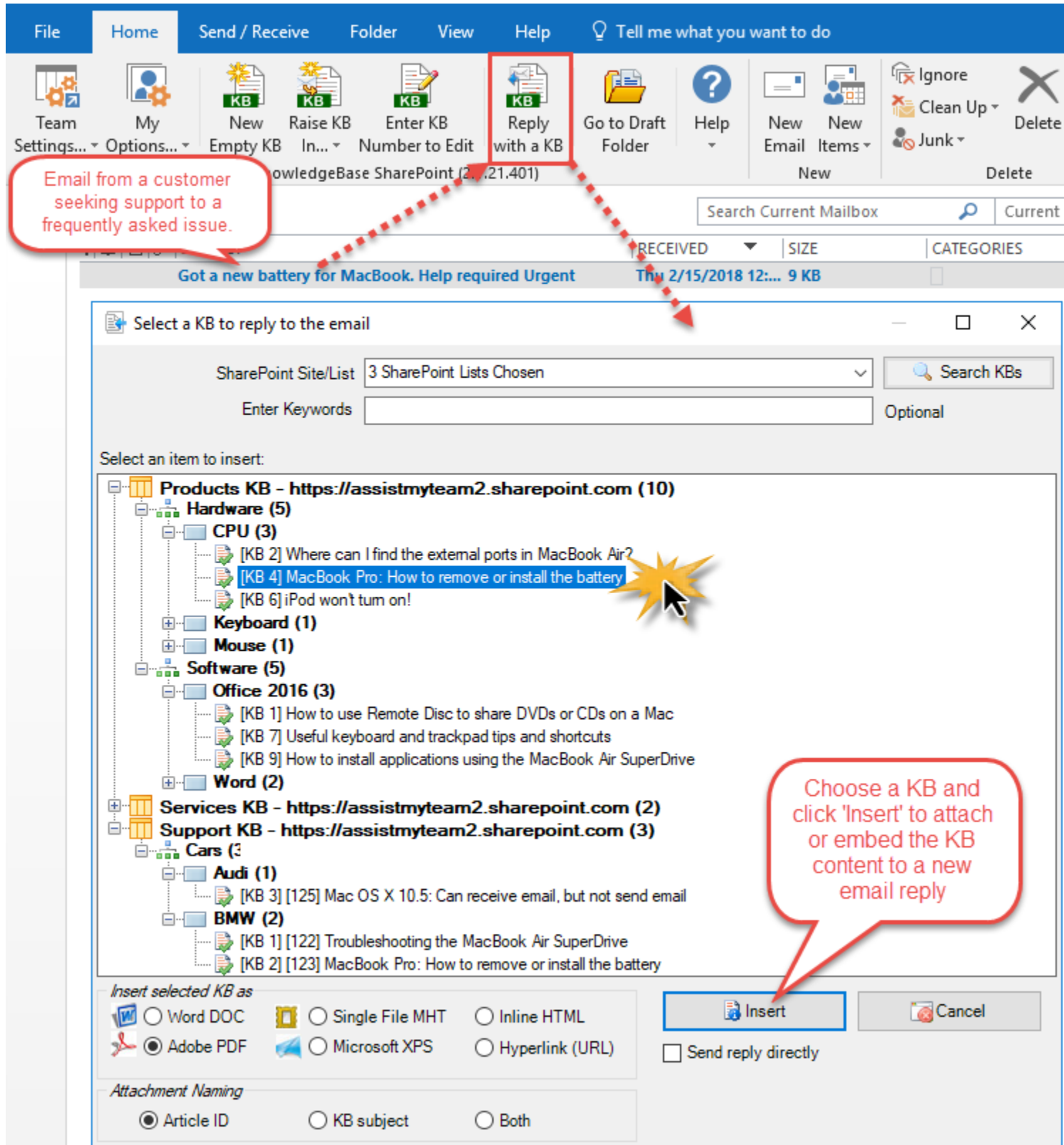
NOTE: For more references and helps on working of Team KB and using KB articles in Outlook from SharePoint, refer to the PDF Help Manual, which can be invoke from **Outlook > Team KB toolbar or ribbon > Help > Help Topics**.

You can also download the full PDF help manual directly from *this link*.

---- End of User Install Guide