Team Knowledgebase for Outlook
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 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 database configuration with the Team KB Admin tool. And take note of the KB database configuration 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 KB database that was already configured earlier by your administrator once you start Outlook.

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).*
- *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.*

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)*
TeamKBUserSetup_x86.exe *(for 32-bit Outlook 2010, 2013, 2016, 2019)*
TeamKBUserSetup_x64.exe *(for 64-bit Outlook 2010, 2013, 2016, 2019)*

For **'Per Machine Installation'** *(ideal for installing on Citrix and Terminal Servers)*
TeamKBUserSetup_x86_Citrix.exe *(for 32-bit Outlook 2010, 2013, 2016, 2019)*
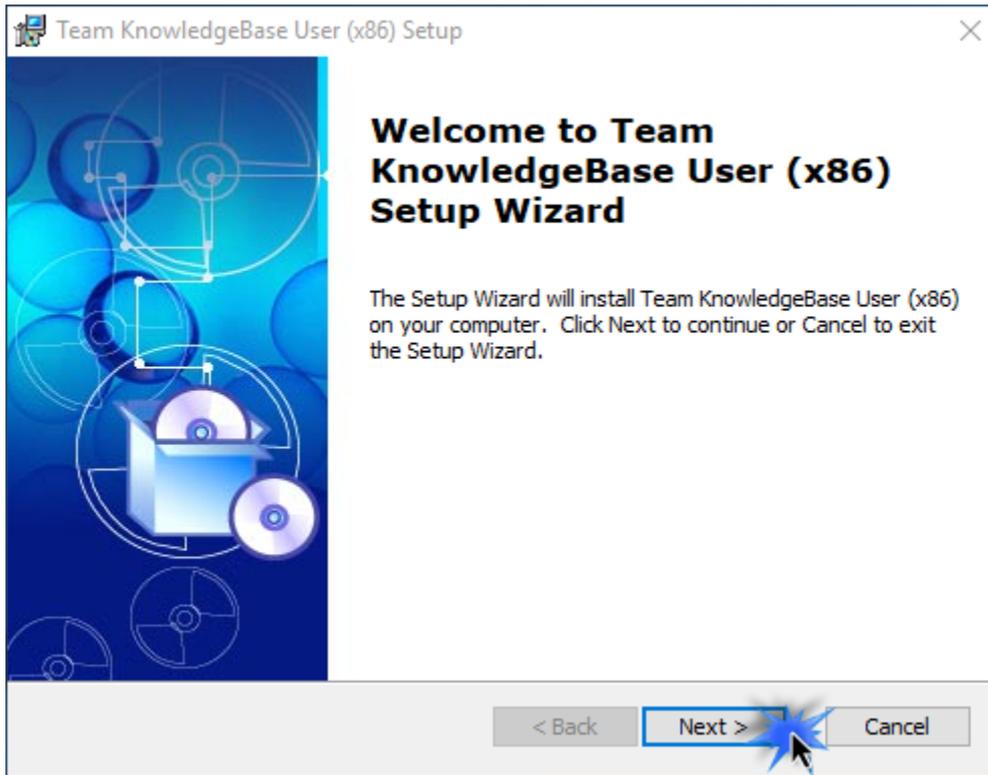TeamKBUserSetup_x64_Citrix.exe *(for 64-bit Outlook 2010, 2013, 2016, 2019)*

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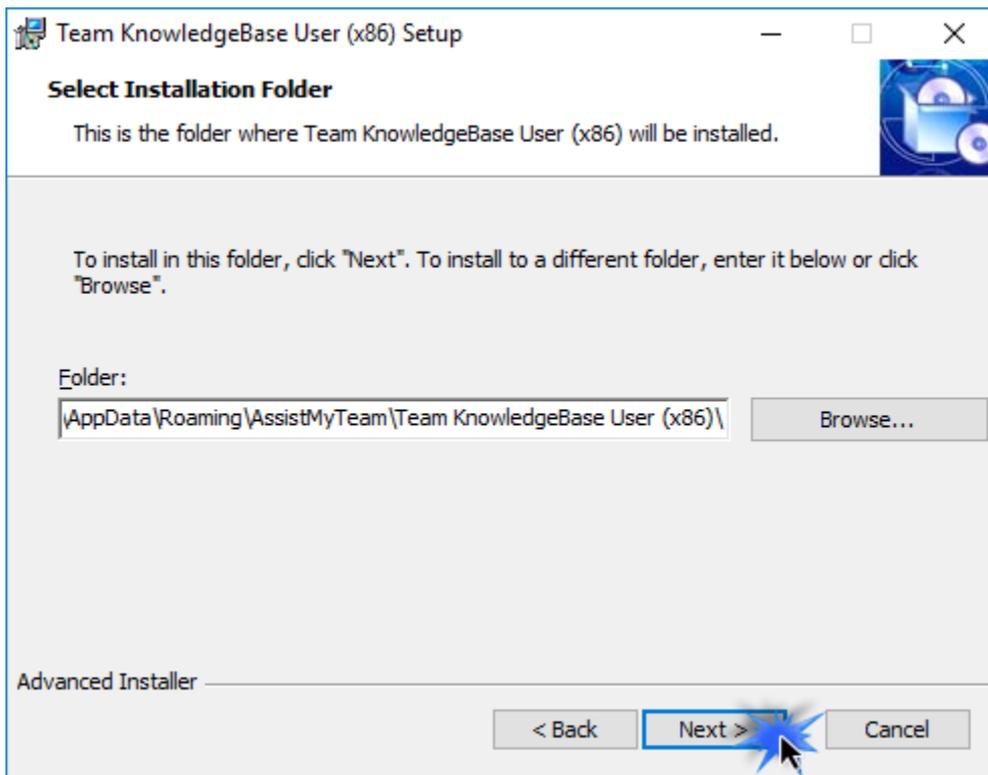 I) **Files Installation,** II) **KB Database Connection**

I) Files Installation

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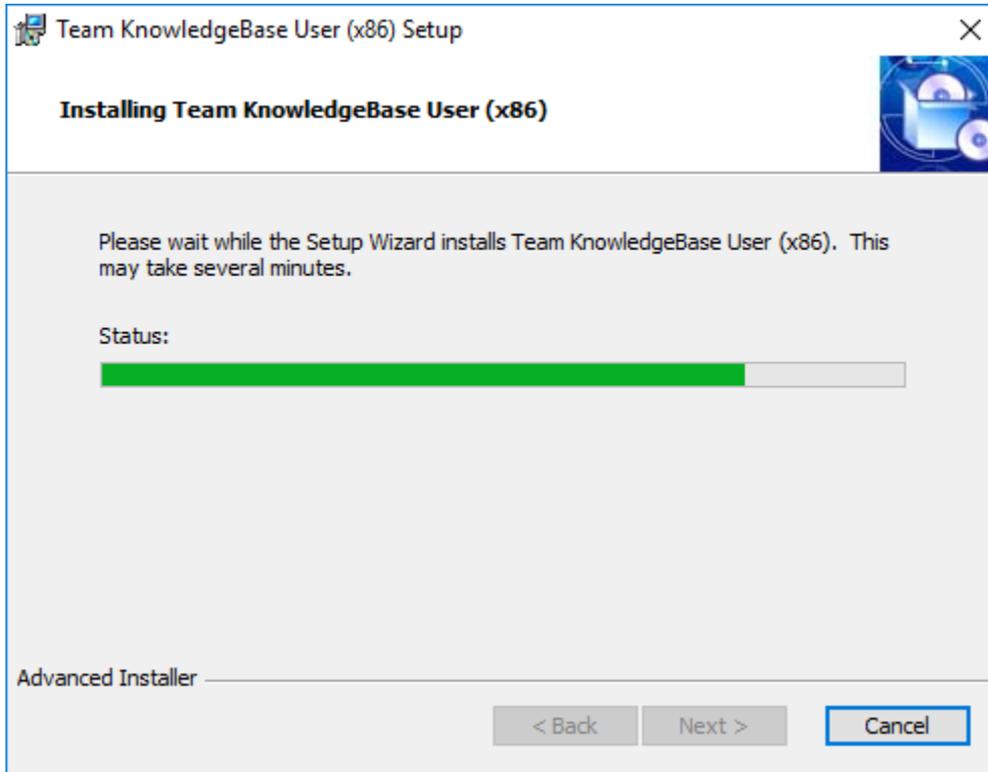
Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.
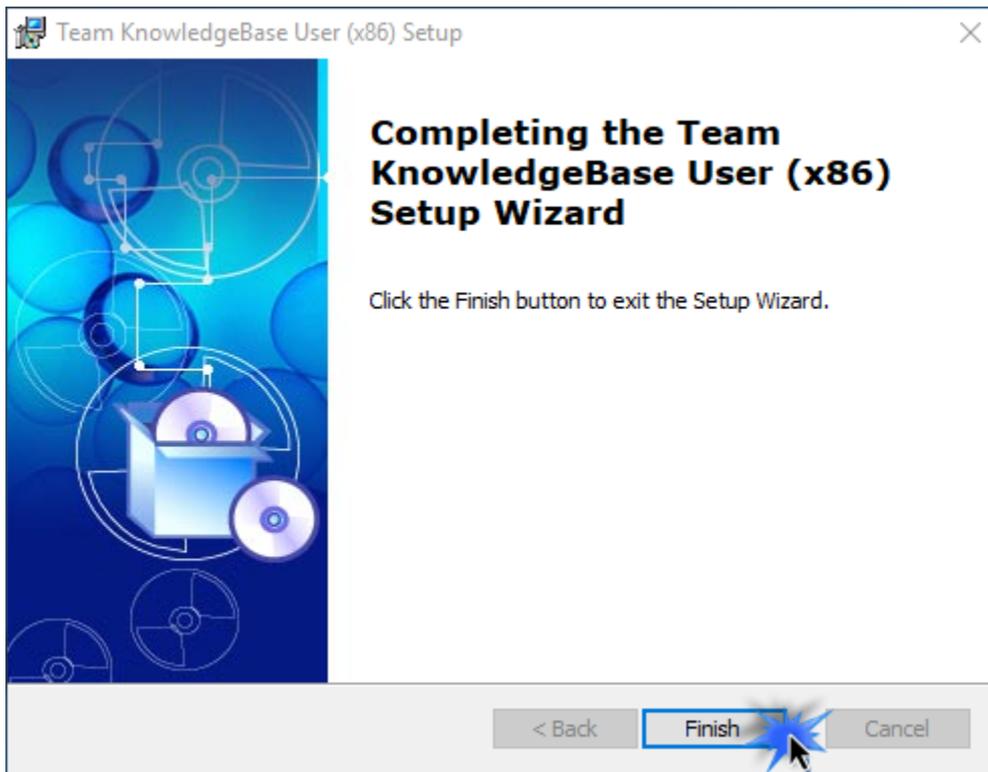
Step 3. It may take a few minutes to complete the whole copying and registration process.

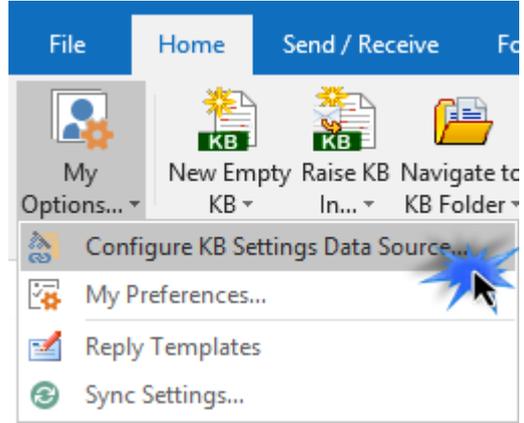**Step 4.** Click **'Finish'** to end the installation wizard.

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) KB Database Connection

Once you have just installed the Team KB User tool, you will get to see this **'Configure KB Settings Data Source'** panel when you start Outlook.
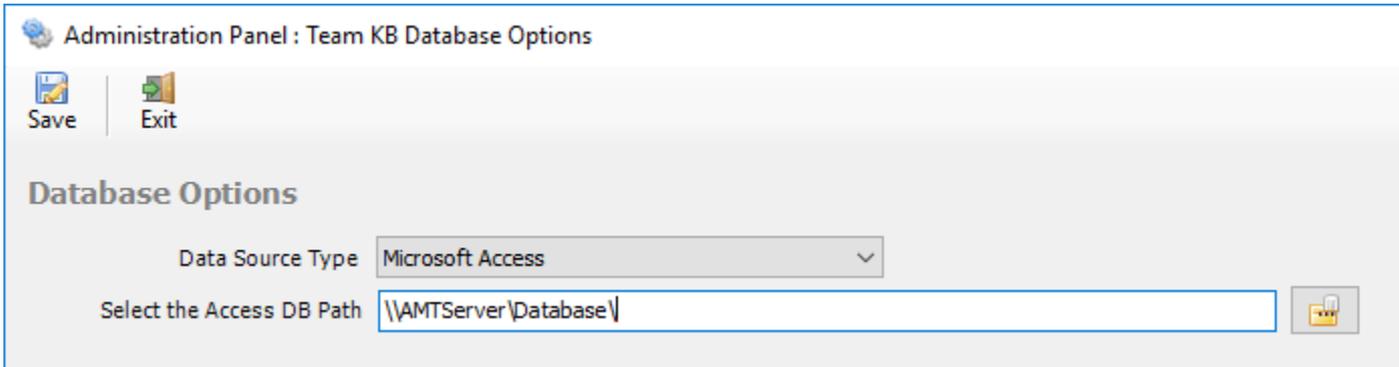
If the *'KB Settings Data Source'* panel does not show up, you can invoke from **Outlook > Team KB toolbar > My Options > Configure KB Settings Data Source**…

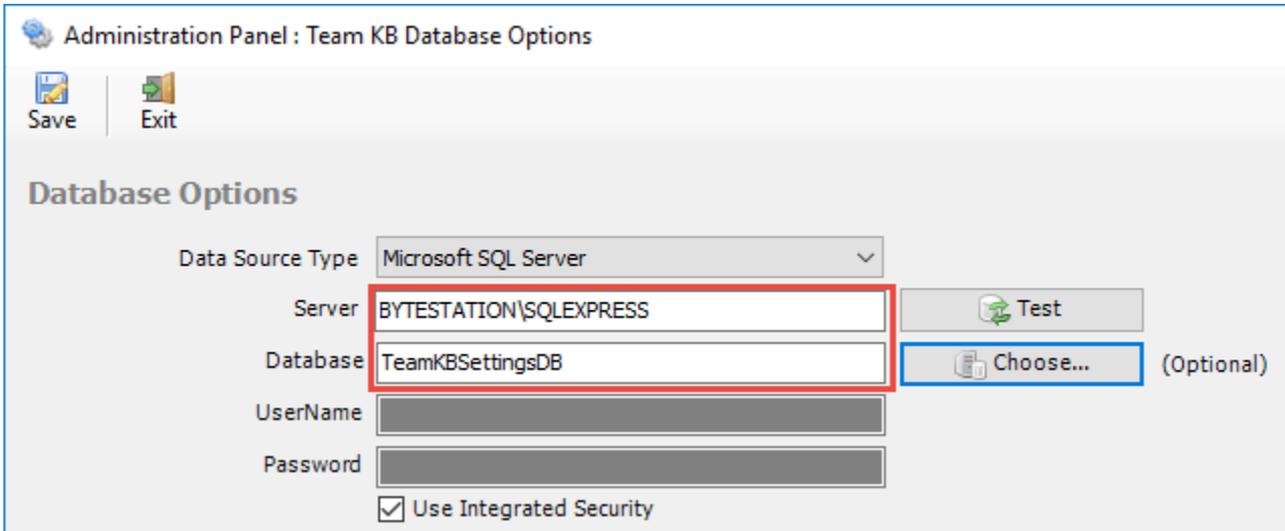### So, what is the KB Settings Data Source?

The Settings data source is nothing but a database that your administrator had created and configured under your company's network with the Team KB Admin tool (either could be a Microsoft Access MDB file with the name *'TeamKBSettings.mdb'* stored on a network folder or a Microsoft SQL Server database with the name *'TeamKBSettingsDB'* located in your office network). The data source stores drop-down lists such as categories and types, email templates, notification and other configurations. In short, these are global settings that streamline the behavior on how all users raise, access and use KB articles in their Outlook.

i) Access database - If your administrator had chosen a Microsoft Access database, it would be on a shared network path (e.g. *\\AMTServer\Database\).* All you need to do is enter that URL path in the Access path box as shown below:

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", otherwise, you may not able to generate new KB articles to any of the administrator chosen KB folders.

ii) SQL Server database - Another database option is the SQL server. You need to enter the server name where the database for Team KB resides. The Database name is optional only if your administrator had left it blank when configuring it the first time. If it is left empty, it would assume the default database name is "*TeamKBSettingsDB*".
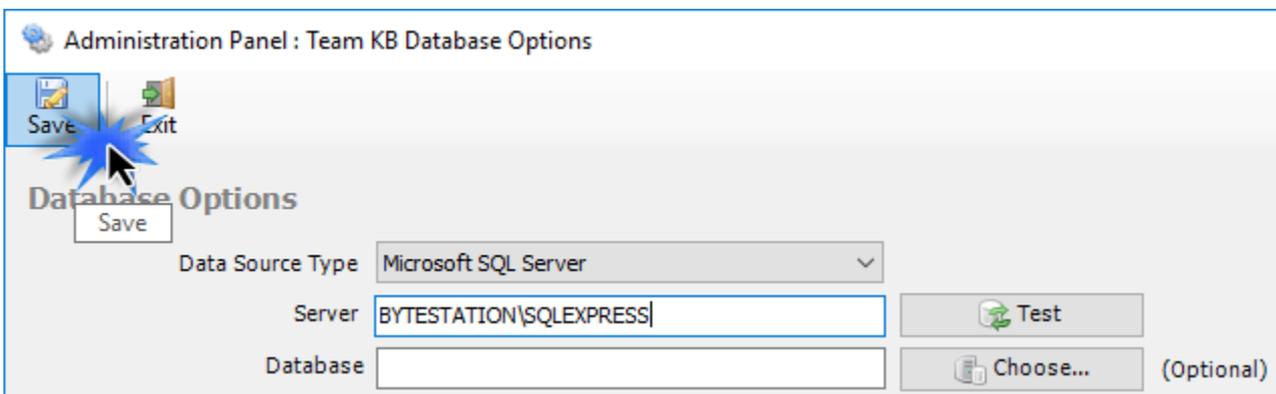
If your SQL server is configured to use windows authentication (NTLM), then you can check the "*Use Integrity Security*" option to let Windows manage the credentials to access the resources on the SQL server, otherwise, you need to supply valid credential (username and password).

Using Cloud based SQL Server database – If you administrator had configured the KB database in cloud based SQL server service such as Amazon RDS cloud service, you need to input the endpoint URL of the online server along with the suffix of the port number after the endpoint as "**,1433**" so that the full URL in the server name would be '**XXXXXXXXXXXXXXXXXXXXXXXXX.rds.amazon.com,1433**'.

Database Type	Microsoft SQL Server
Server	ctiyvwckp9sa.us-west-2.rds.amazonaws.com,1433
Database	(Optional)
Username	
Password	Test
☐ Use Integrated Security	

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

Filter: All Instances ⌄	Q Search DB Instances... ✕

	Engine ▾	DB Instance ▾	Status ▾	CPU ▾	Current Activity
☐ ▾	SQL Server Express	amtdbinstances	available	1.19%	1 Connecti

server

Endpoint: _____.ctiyvwckp9sa.us-west-2.rds.amazonaws.com:1433 (authorized) ⓘ

Configuration Details		Security and Network	
Engine	SQL Server Express 12.00.4422.0.v1	Availability Zone	us-west-2a
License Model	License Included	VPC	vpc-458b0e21
		Subnet Group	default (Complete)

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.
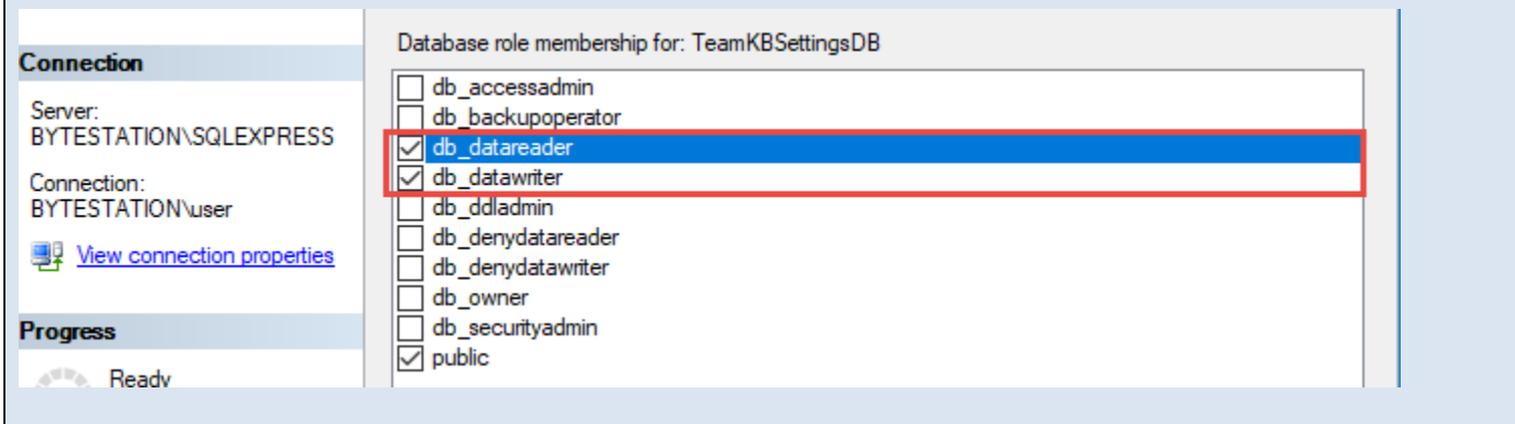
Save   Exit

Database Options

Database Type	Microsoft Azure	
Server	assistmyteam	.database.windows.net Test
Database		Choose... (Optional)
Username	francas	
Password	******************	

NOTE: If the database name is left empty, it would assume the default database name is "*TeamKBSettingsDB*".
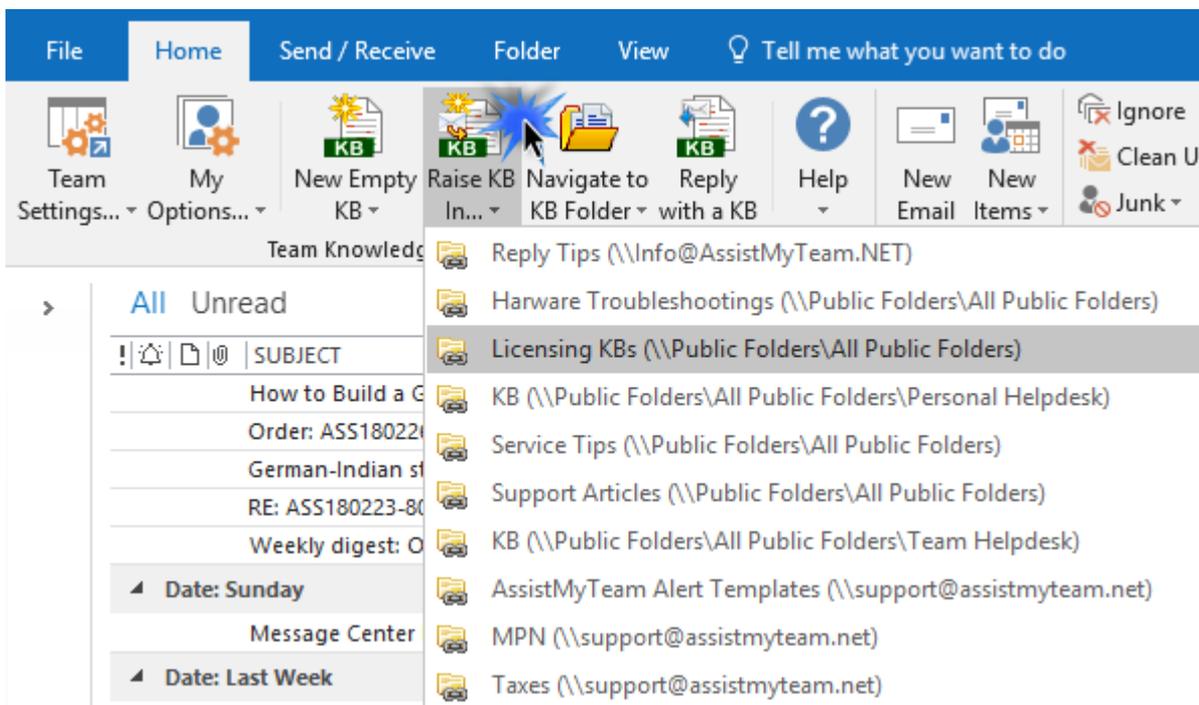
Now, click the Save button, to confirm the connection. Team KB User add-in is now ready to **connect to the KB Data Source** to synchronize drop downs such as categories, types and other settings metadata from the database to your system.
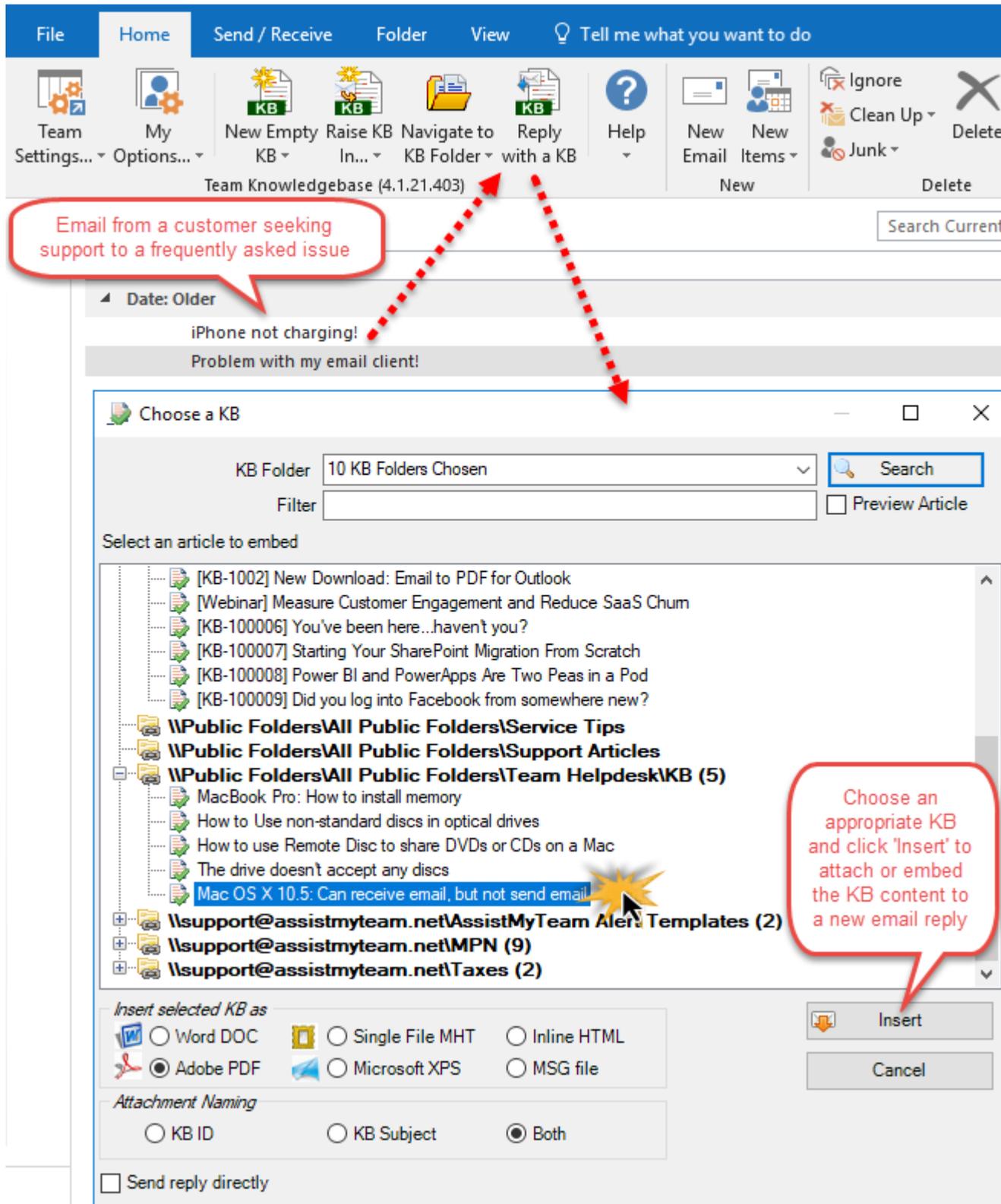
Additional step on the SQL database

If your administrator had configured Team KB Admin add-in to store the settings and other configurations in a SQL server database, then please make sure that you have adequate permission to access and update the tables in that database i.e., **db_datareader** and **db_datawriter** permission on the Team KB SQL database.

Now, open Outlook and from the Team Knowledgebase toolbar, you will notice that the **'New Empty KB'**, **'Raise KB in'** and **'Navigate to KB folder'** drop down menu shows all the administrator's chosen KB folders where the KB articles are stored. 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.

More importantly, you can choose an existing KB article from one of the relevant KB folder to reply to an email in Outlook.

NOTE: For more references and helps on working of Team KB and using KB articles in Outlook, 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*