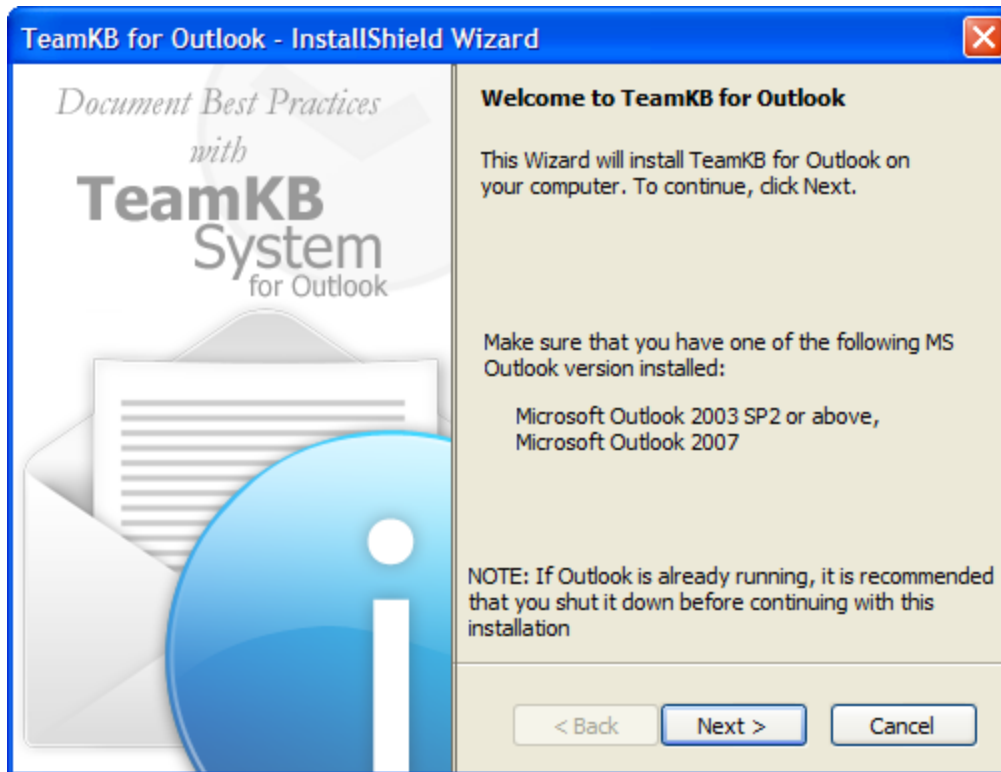


Installations

Run the Setup.exe

To start the installation process, you would need to run the downloaded setup.exe. In the first screen of the installation dialog, you would see the Outlook version requirements. Please make sure that you have Outlook 2003 or later to continue with the installation.



Optional 'server pack' install

The main portion of the client tools is a simple Outlook add-in, which will be installed by default. But if you are an administrator/KB manager and have not configured an Exchange public folder or mailbox yet to be used with TeamKB, you should also install the optional 'Server pack'.

More...

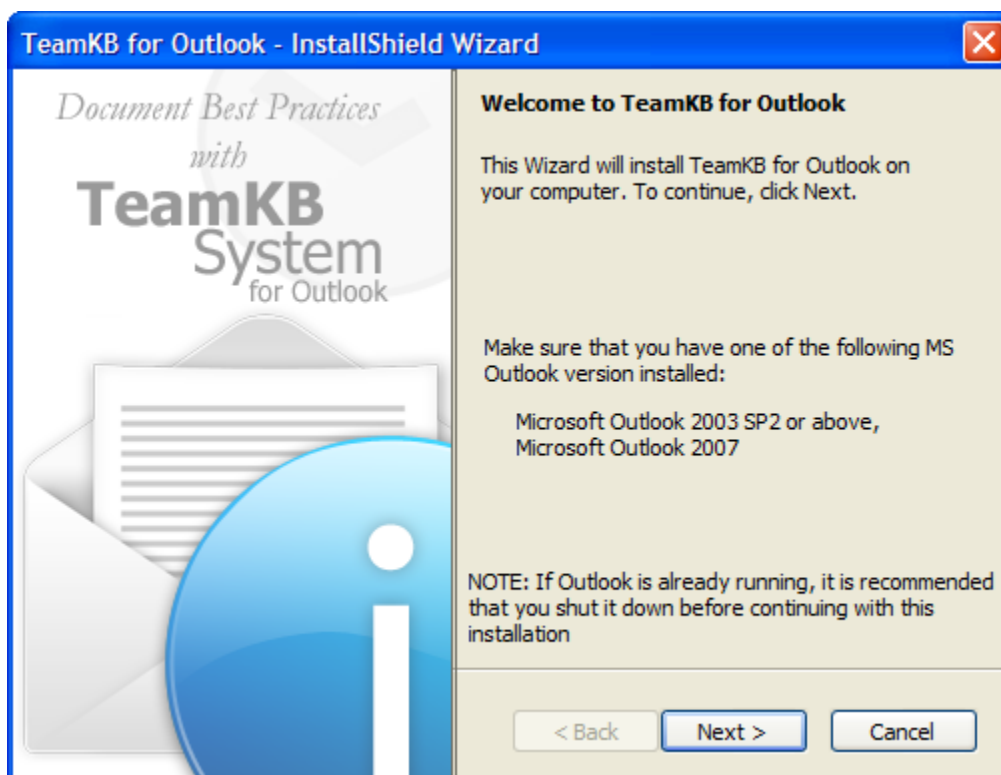
- [Client installation with Server Pack](#)
- [Simple client installation](#)

Client installation with server pack

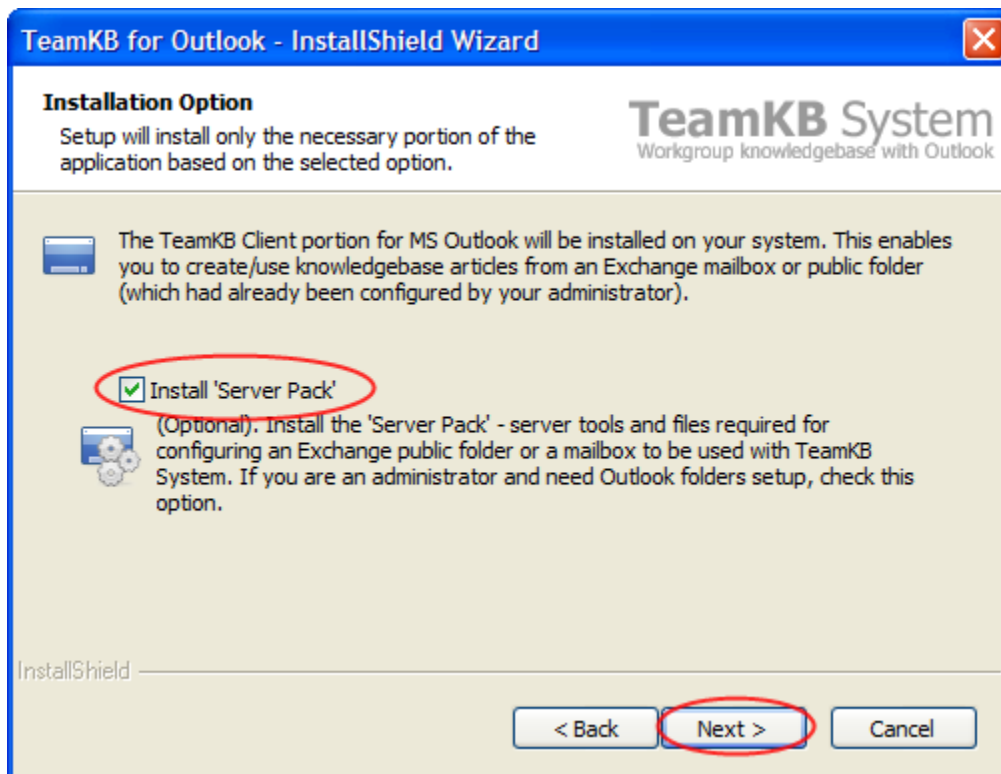
The Server pack installation consists of both client and server tools and has to be performed by the KB administrator/manager before the client tool is installed on every staff's system. This is because, with the TeamKB server tools, the manager is required to configure an Exchange folder (either a shared mailbox or a public folder) to be used for TeamKB articles.

Installation Steps:

Step 1. Run the setup.exe to start the installation. Click Next to Continue. If Outlook 2003 (SP2 or above) 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. In the 'Installation Option' dialog, select the optional feature Install 'Server Pack' and click Next.



Step 3. In the 'Customer Information' dialog, you will be prompted to select if the application has to be installed for all users or only for yourself (current user).

TeamKB for Outlook - InstallShield Wizard

Customer Information
Please enter your information.

TeamKB System
Workgroup knowledgebase with Outlook

User Name:
Nash J

Company Name:
AssistMyTeam

Install this application for:

Anyone who uses this computer (all users) 1

Only for me (Nash J) 2

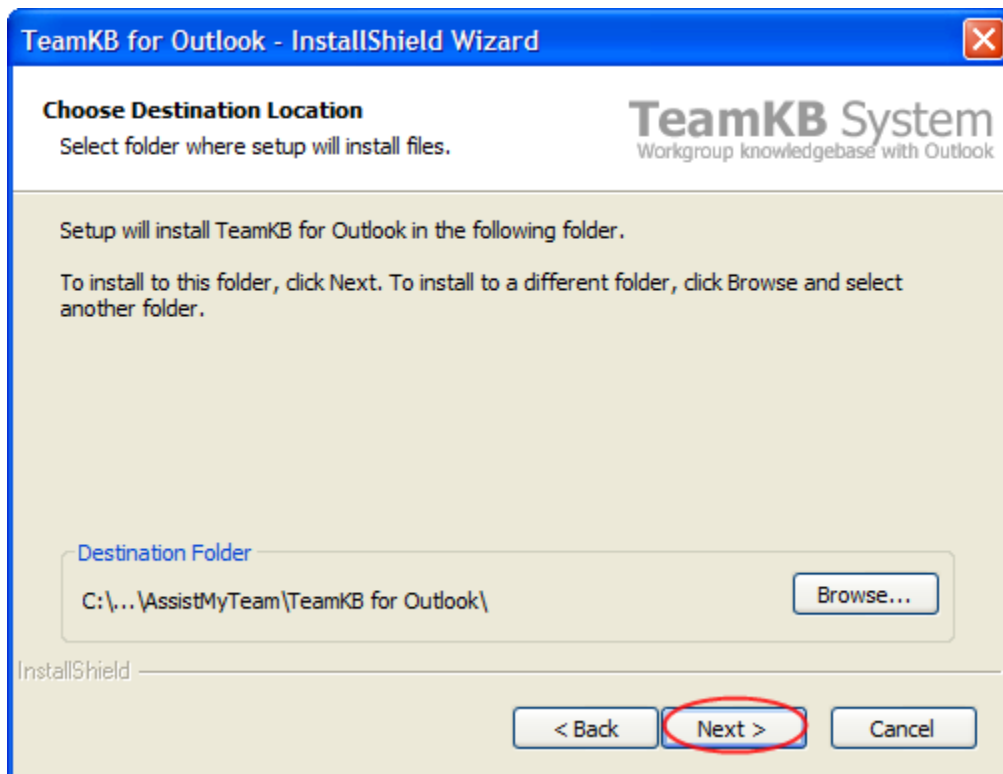
InstallShield

< Back Next > Cancel

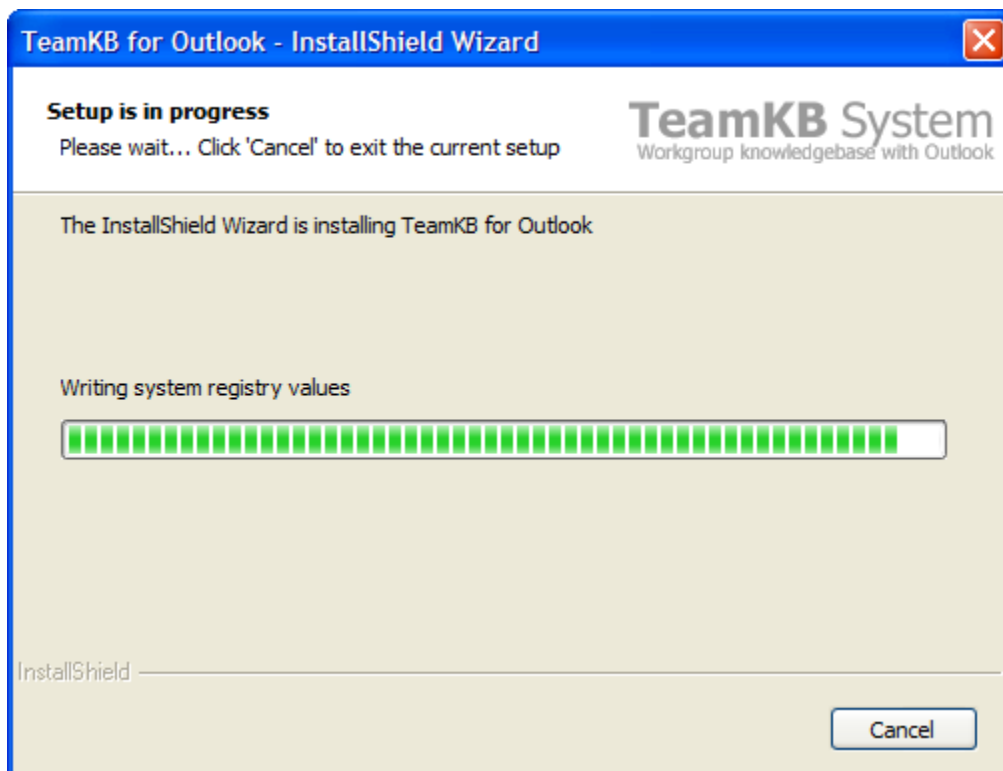
1 - The application will be installed for all users of the system i.e., every user in that particular system will be able to use the installed application. This requires a local administrative rights on the part of the current user. Also, note that, the application will be installed under the Program Files folder by default. (eg. *C:\Program Files\AssistMyTeam\TeamKB for Outlook*).

2 - The application will be installed only for the current user (yourself). With this option, the application will be installed under the user's application data subfolder by default (eg. *C:\Documents and Settings\Username\Application Data\AssistMyTeam\TeamKB for Outlook*). To use the application by another user on the same system, the user needs to again install the application on their own application data subfolder and will be available for that user only.

Step 4. 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.



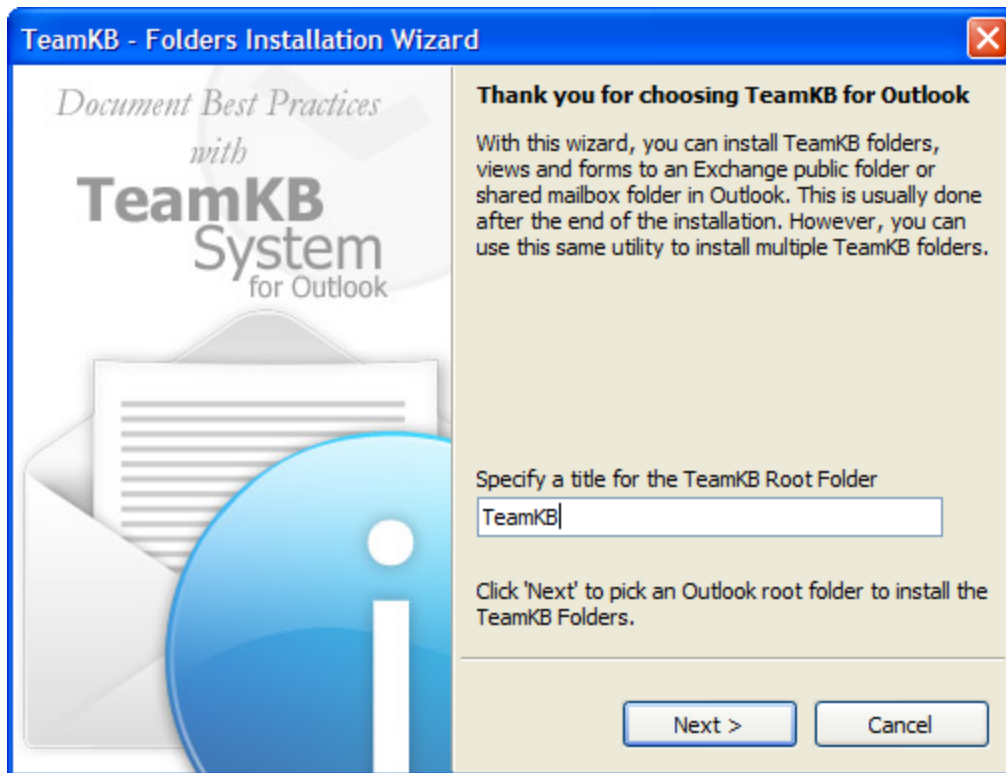
Step 5. Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process.



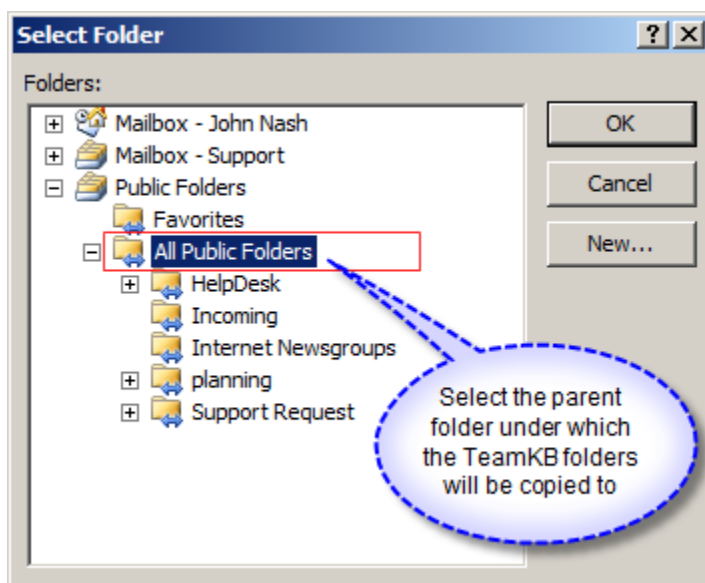
Step 6. Click 'Finish' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.



Step 7. Start Outlook (restart if it was already running during the files installation). A folders Installation Wizard dialog (as seen below) enables you to customize the name of the parent TeamKB folder that will be created. By default, it has a title of 'TeamKB'.

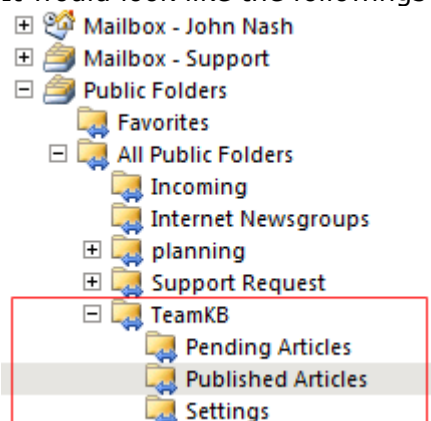


Step 8. Clicking 'Next' button would enable you to select an Outlook parent folder where the specified TeamKB root folder would be created. If Microsoft Outlook is not already opened, it would be started automatically.



The tool would then copy TeamKB subfolders, forms & designs, views etc. from the TeamKB PST template file (TeamKBPST.pst).

It would look like the followings layout:



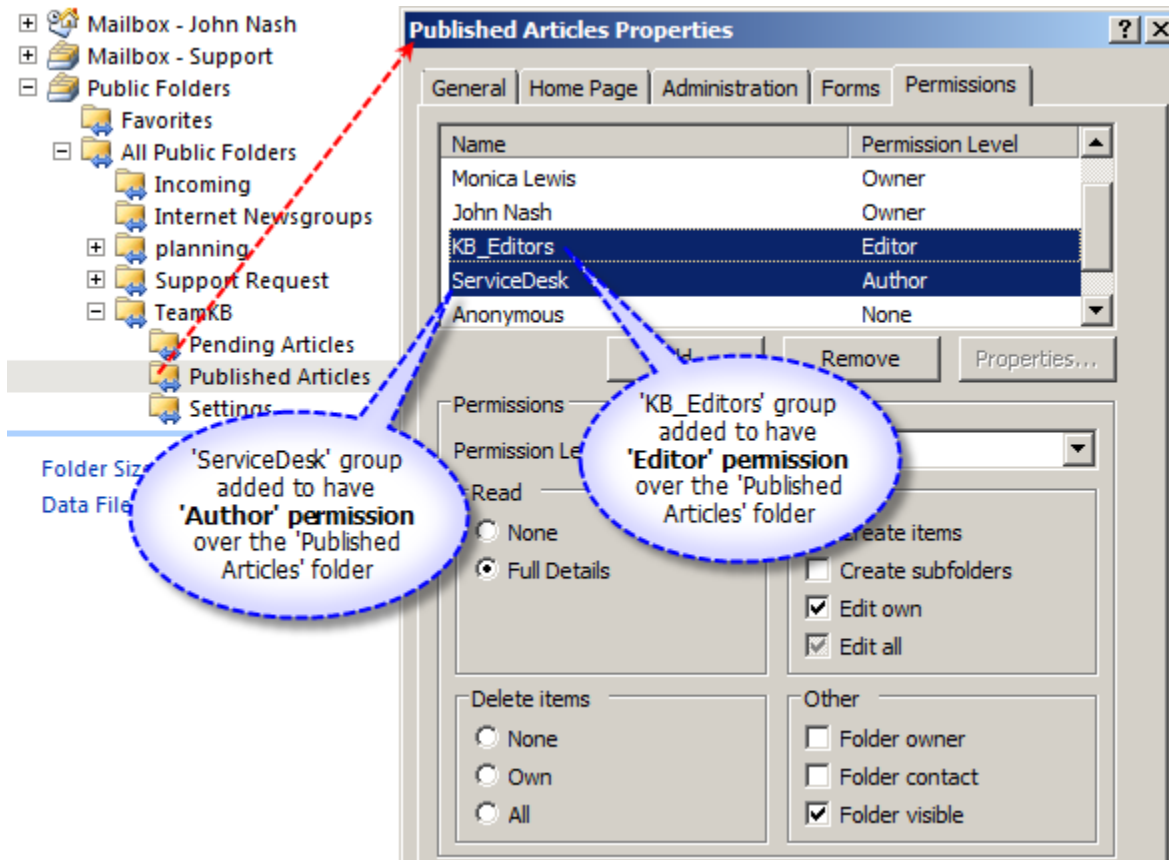
TeamKB Folders Permission

Now that you have installed - TeamKB files into your system and TeamKB folders into your public folder or mailbox, you as a KB manager, would need to configure the permission level of each TeamKB folder, namely, the '*Pending Articles*', '*Published Articles*' and '*Settings*'. By default, the permission on each subfolder for all users is set to 'Author'. Only the user (manager) who had performed the installation has got 'Owner' permission. Hence, it is this user (manager) who would need to grant permission to the folders for all members of your team. Without a proper permission structure defined, authors/editors accessing the TeamKB folders would not be able to perform most of the tasks such as creating submitting new articles, approving pending articles, reviewing changes etc.

The following table summarizes what permission levels are required on each folder:

Folder	Permission
Pending Articles	At least ' Author ' permission to all members of your team At least ' Editor ' or above permission for those team members (Editors) who would review and approve/reject pending articles
Published Articles	At least ' Author ' permission to all members of your team At least ' Editor ' or above permission to team members (Editors) who would review existing articles
Settings	At least ' Reviewer ' permission to all members of your team At least ' Editor ' or above permission to team members (Editors) who would approve new posted articles.

We recommend that a users group consisting of all of your team be created such that KB manager (owner) can easily assign permission to the group as a whole, instead of undergoing multiple steps of selecting and granting the same permission to each member. In the example below, a group 'ServiceDesk' comprising of all team members (Eg. general staffs, authors, editors) and another group 'KB_Editors' (comprising of members with Editor roles) are granted editor permission over the 'Published Articles' TeamKB folder.



The screenshot below lists all the files that are installed on the system. Notice, that, there are additional files which forms the Server option pack - tools to configure and install a new TeamKB folder, which has to be performed only by the administrator/ KB manager.

