SharePoint Knowledge Base Solution Accelerator for SharePoint 2007

Release 2.0 (SA05)

- Overview
- System Requirements
- Installation
- Configuration
- Using SharePoint Knowledge Base Solution Accelerator
- Licensing and Activation

System Requirements

Operating System	Microsoft Windows Server 2003 and 2008
*Server	Microsoft Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007 with Service Pack 2 Microsoft .NET Framework 2.0 or 3.0
Browser	Microsoft Internet Explorer 7 or higher

Note: *Bamboo products are not supported in an IIS Web garden configuration.*

Installation

- About the Setup Program
- Installing the Prerequisites
- Installing SharePoint Knowledge Base Solution Accelerator
- Manually Installing or Uninstalling SharePoint Knowledge Base Solution Accelerator
- Manually Activating the Product Features for a Site Collection
- Upgrading SharePoint Knowledge Base Solution Accelerator
- Uninstalling SharePoint Knowledge Base Solution Accelerator
- Locating the Error Log File(s)
- Installed Files and Code Access Security

Upgrading the Bamboo Knowledge Base Solution Accelerator

All upgrade procedures apply to the KB Admin site template only.

To upgrade from 1.1 to 1.2 or newer, do the following:

1. Uninstall the old version. See Uninstalling the Product for more information.
2. Run *iisreset* from the command prompt.
3. Install the 1.2 or newer version. See Installing the Product for more information.

To upgrade from 1.0 to 1.2 or newer, do the following:

1. Uninstall the old version. See Uninstalling the Product for more information.
2. Run *iisreset* from the command prompt.
3. Install the 1.2 or newer version. See Installing the Product for more information.
4. When you access the home page of the KB Admin site, notice that the **Relate Articles** lookup column in the **Bamboo KB Articles** list is updated from using **ID** to **Article Title** for the lookup.
5. From the Quick Launch bar under **Comment Control**, click the **Approve & Manage** link.
6. Go to **Site Actions** > **Edit Page** and add the Bamboo KB Search Web Part to the page.
7. Click the **Edit** button on the top right of the title bar of the Bamboo KB Search Web Part and select **Modify Shared Web Part**. After selecting **Modify Shared Web Part**, the Content Editor Web Part on this page will be automatically removed from the page.
8. In the tool pane, click the **Test Connection** button, then click the **green arrow button**. You can then configure the Bamboo KB Search Web Part like it is configured under step 6 (Configure the Bamboo KB Search Web Part for Searching Ratings and Comments) on the Configuring the Bamboo KB Admin Web Parts page.

Upgrading 1.0 from Absolute to Relative Paths

To upgrade your 1.0 KB Admin site to use relative paths instead of absolute paths, you will need to make a few changes to your KB Admin site.

1. From the KB Admin home page, click **Site Actions** > **Site Settings**.
2. Select **Quick Launch** under the Look and Feel section.
3. Click the Edit button for the **Answer Questions** link under Pending Questions. Edit the URL as follows:
   - For KB sites directly under the top site (i.e. root site), your relative path should look like this:

     /SiteDirectory/KBAdmin/ or **~/SiteDirectory/KBAdmin/HW41/** is equivalent to:
       o http://servername/SiteDirectory/KBAdmin/_blank
   - For KB sites under a sub site (i.e. current web site), your relative path should look like this:

     Lists/Discussion%20Board/ or **./Lists/Discussion%20Board/** is equivalent to:
       o http://servername /SiteDirectory/ KBAdmin/Lists/Discussion%20Board/_blank
4. Click **OK**.
5. Repeat steps 3 and 4 for each header and sub link in the Quick Launch nav bar.

Before installing the product, read the **Installing the Product** section of the Online Documentation and review KB.12464: Best Practices for Installing Bamboo Products.

To access the Setup program:

1. Download the self-extracting product EXE from the storefront and save it to a local folder on the SharePoint server.
2. Double-click the product EXE file to extract the contents of the product download.
3. **The Setup program will automatically start.** To start the Setup program manually, double-click the **Setup.bat** file in the root of the folder where the product files were extracted.

The Setup program may look different for different product versions. See examples below of the two Setup programs that are currently in use. Both versions of the Setup program work the same way.
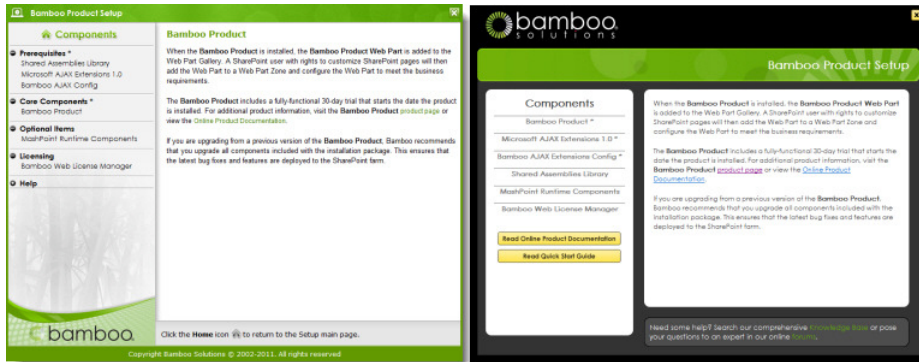
Note: The minimum screen resolution to view the Setup program is 1024x768.

The Setup program contains links to each product component under the **Components** header on the left. Click on any of these links to view a description of the component on the right. The component description contains important information about where to install the component and the required permissions for the installation account. Read this information carefully before proceeding.

Each product may have several components, which fall into the following categories:

- **Prerequisites**: Some products include prequisite components that must be installed **before** the Bamboo product core components. Not all products will have prerequisites. Examples of prerequisites include the Shared Assemblies Library, Microsoft AJAX Extensions, and Bamboo AJAX Config.
- **Core Components**: The product will include one or more core components that are required for the Bamboo product to work.
- **Optional Items**: Optional items provide additional features or functionality but are not required to use the Bamboo product. Not all products will have optional items. Examples of optional items include the MashPoint Runtime Components and sample ASP.NET applications.
- **Licensing**: All products will include the Bamboo Web License Manager or Bamboo License Manager. Licensing is required to activate a product license. It is not required during 30-day product trials.
- **Help**: The Setup program also contains links to the Online Documentation and the Installation and Licensing Quick Start Guide. Links to other product-related resources, like the Bamboo Knowledge Base, may also be included.

After reviewing the installation location and required installation permissions for a component, click the **Install** button at the bottom of the Setup screen to install it. If the product includes multiple components, click the Install button for each component.

Click the Home icon 🏠 to return to the Setup main page.

About the extracted product files:

The extracted product files include the file **Setup.bat**, which launches the Setup program, and may also include the following folders:

- **\[Product].wsp**: Contains the solution deployment file for this product. There may be more than one product WSP folder, depending on the product.
- **\docs**: Contains the Installation and Licensing Quick Start Guide.
- **\msi** : Contains installation executables for this product.
- **\res**: Contains files required by the Setup program.
- There may be other folders, depending on the requirements for the product.

Some products may have components listed in the **Prerequisites** section of the Setup program that are required for the product to work properly. All of the components listed in the **Prerequisites** section must be installed **before** installing the main product. Click on the first component in the **Prerequisites** section and read the descriptive information and installation requirements. Then, click the **Install** button for that component, located at the bottom of the screen. Do this for each component in the **Prerequisites** section.
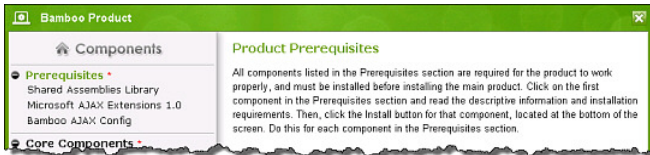
Click a section below for more information about that prerequisite component. **Note:** Not all products will have prerequisites.

- Shared Assemblies Library
- Microsoft AJAX Extensions 1.0
- Bamboo AJAX Config

Recommendations for a Successful Installation

Follow these guidelines to ensure a successful installation:

1. Back up your system.
2. Make sure that your system meets the requirements listed in the **System Requirements** section of the product's Online Documentation.
3. Review KB.12464: Best Practices for Installing Bamboo Products before installing any product component.
4. Review the **Installation Location** and **Required Installation Permissions** for each product component before installing it.
5. Stop the **World Wide Web Publishing Service** before installation.

TOP

Shared Assemblies Library

The Shared Assemblies Library is required when installing Bamboo products in a multiple Web front-end environment. Installing the Shared Assemblies Library will ensure that other Bamboo products are not affected if a Bamboo product is later upgraded or removed. For more information about the Shared Assemblies Library, read KB.12439: How to Install the Shared Assemblies Library.

To install the Shared Assemblies Library, select the **Shared Assemblies Library** component from the Setup program. Click the **Install** button to start the **Bamboo Core** installer, which installs the Shared Assemblies Library. Repeat this installation on each Web front-end server in the SharePoint farm.
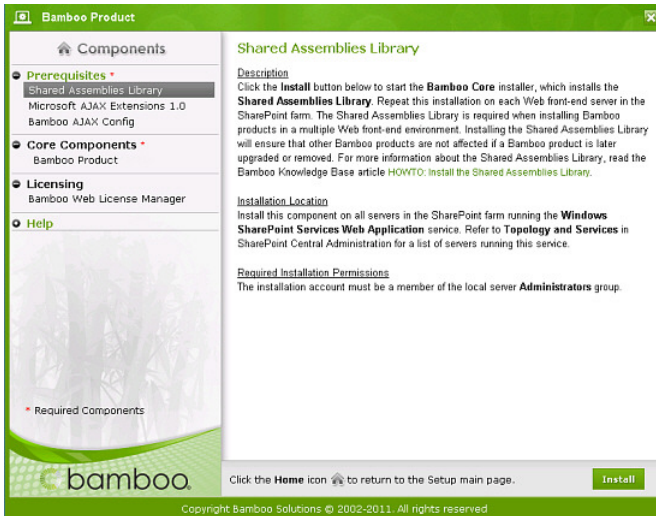
Installation Location
Install this component on all servers in the SharePoint farm running the **Windows SharePoint Services Web Application** service. Refer to **Topology and Services** in SharePoint Central Administration for a list of servers running this service.
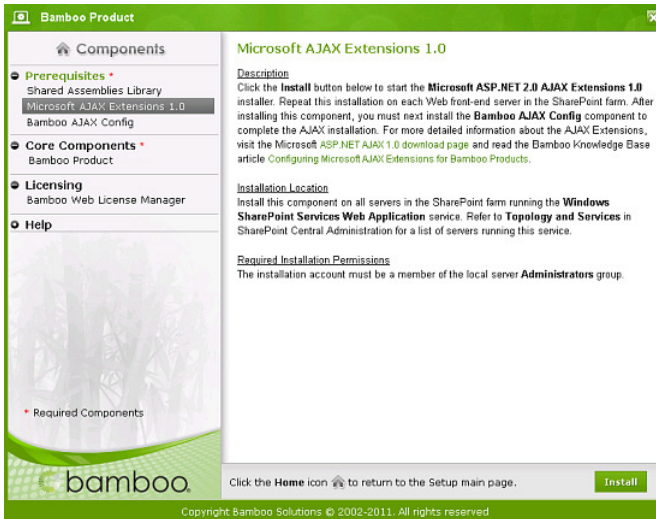
Required Installation Permissions
The installation account must be a member of the local server **Administrators** group.

TOP

Microsoft AJAX Extensions 1.0

To install the Microsoft ASP.NET 2.0 AJAX Extensions 1.0, select the **Microsoft AJAX Extensions 1.0** component from the Setup program. Click the **Install** button to start the **Microsoft ASP.NET 2.0 AJAX Extensions 1.0** installer. Repeat this installation on each Web front-end server in the SharePoint farm. After installing this component, you must next install the **Bamboo AJAX Config** component to complete the AJAX installation. For more detailed information about the AJAX Extensions, visit the Microsoft ASP.NET AJAX 1.0 download page and read KB.12637: Configuring Microsoft AJAX Extensions for Bamboo Products.

Installation Location
Install this component on all servers in the SharePoint farm running the **Windows SharePoint Services Web Application** service. Refer to **Topology and Services** in SharePoint Central Administration for a list of servers running this service.
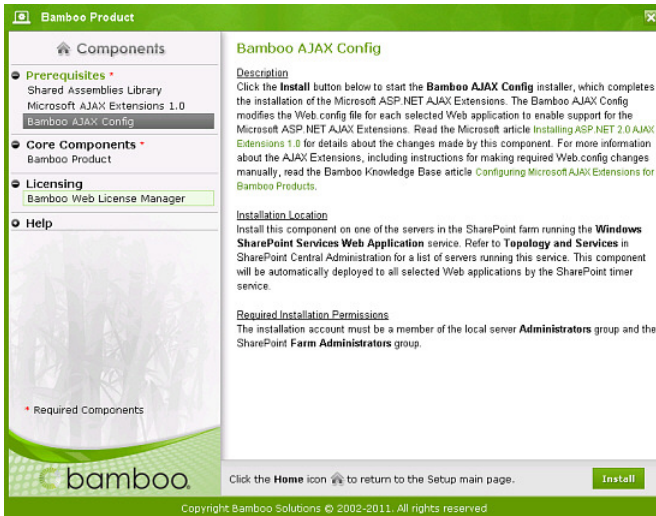
Required Installation Permissions
The installation account must be a member of the local server **Administrators** group.

TOP

Bamboo AJAX Config

To install the Bamboo AJAX Config, select the **Bamboo AJAX Config** component from the Setup program. Click the **Install** button to start the **Bamboo AJAX Config** installer, which completes the installation of the Microsoft ASP.NET AJAX Extensions. The Bamboo AJAX Config modifies the Web.config file for each selected Web application to enable support for the Microsoft ASP.NET AJAX Extensions. Read the Microsoft article Installing ASP.NET 2.0 AJAX Extensions 1.0 for details about the changes made by this component. For more information about the AJAX Extensions, including instructions for making required Web.config changes manually, read KB.12637: Configuring Microsoft AJAX Extensions for Bamboo Products.

Installation Location
Install this component on one of the servers in the SharePoint farm running the **Windows SharePoint Services Web Application** service. Refer to **Topology and Services** in SharePoint Central Administration for a list of servers running this service. This component will be automatically deployed to all selected Web applications by the SharePoint timer service.

Required Installation Permissions
The installation account must be a member of the local server **Administrators** group and the SharePoint **Farm Administrators** group.

TOP

Installing SharePoint Knowledge Base Solution Accelerator

Read all of the following information before installing SharePoint Knowledge Base Solution Accelerator:

- Recommendations for a Successful Installation
- Installation Location

- [Required Installation Permissions](#)
- [Installation Instructions](#)

Recommendations for a Successful Installation

Follow these guidelines to ensure a successful installation:

1. Back up your system.
2. Make sure that your system meets the requirements listed in [System Requirements](#).
3. Review [KB.12464: Best Practices for Installing Bamboo Products](#) before installing any product.
4. Review the **Installation Location** and **Required Installation Permissions** before installing.
5. Stop the **World Wide Web Publishing Service** before installation.

Installation Location

If you are installing SharePoint Knowledge Base Solution Accelerator in a SharePoint farm environment, make sure to start the installation on the correct server. The required installation location is listed in the Setup program in the description for each component.

SharePoint Knowledge Base Solution Accelerator must be installed on one Web front-end (WFE) server in the SharePoint farm where the **Windows SharePoint Services Web Application** service is running. Check **Central Administration > Operations > Topology and Services** for a list of servers running this service. The product will automatically be deployed to all other WFE servers in your farm.

Required Installation Permissions

Required installation permissions are listed in the Setup program in the description for each component. For most Bamboo products, the installation account must have the following permissions:

- Member of the local server **Administrators** group
- Member of the SharePoint **Farm Administrators** group
- **Site collection administrator** (for automatic feature activation)

Installation Instructions

Stop! If you are upgrading from a previous version of SharePoint Knowledge Base Solution Accelerator, make sure to check for important information in [Upgrading SharePoint Knowledge Base Solution Accelerator](#) before installing.

Click a section below for more information:

- [Installing SharePoint Knowledge Base Solution Accelerator](#)
- [Installing the Knowledge Base Site Templates](#)

Installing SharePoint Knowledge Base Solution Accelerator

1. If the Setup program is not already running, double-click the **Setup.bat** file in the root of the product folder to launch it.
2. Select the product component in the Setup program. Verify the installation location and required permissions and then click **Install**.

3. Click **Next** to begin the installation. Verify that the system checks pass successfully, then read and accept the End-User License Agreement.
4. In the **Deployment Targets** screen, select the Web application(s) where you want to install the product. Leave the **Automatically activate features** option checked to activate product features during installation. Click **Next** to begin installation.

   Note: If you prefer to activate product features manually after installation, uncheck the **Automatically activate features** option, then read [Manually Activating the Product Features for a Site Collection](#).

5. When installation is complete, review the summary screen to confirm that SharePoint Knowledge Base Solution Accelerator installed successfully. Click **Close**.

Installing the Knowledge Base Site Templates

1. Select the **SharePoint Knowledge Base Solution Accelerator Site Templates** component, then click **Install**.

2. The site templates are automatically installed via STSADM.
3. Reset Internet Information Services after the site templates are installed.
   - To reset IIS using IIS Manager:
     - Go to **Start > Administrative Tools > IIS Manager**.
     - In the Connections pane on the left, expand and select the node for the server you want to restart.
     - In the Actions pane on the right, select **Restart**.
   - To reset IIS using command-line utility (must be a member of the Administrators group on the local computer):
     - Go to **Start** and click **Run**.
     - In the Open box, type **cmd** and click **OK**.
     - At the command prompt, type *iisreset /noforce computername* and press **Enter**.

Manually Installing or Uninstalling SharePoint Knowledge Base Solution Accelerator

The following stsadm command lines are intended for experienced users to manually install or uninstall SharePoint Knowledge Base Solution Accelerator instead of using the Setup program.

The product extraction folder contains four files for manual install and uninstall. They are located in the **\misc** folder:

- BambooAJAXConfigManualInstallation.bat
- BambooCorePackageManualInstallation.bat
- ManualInstallation.bat
- ManualUninstallation.bat

To manually install SharePoint Knowledge Base Solution Accelerator:

1. Navigate to the product extraction folder's \misc folder. For each file below, search for "SET webAppURL="http://vstest5" and replace it with your Web application URL:
   - BambooAJAXConfigManualInstallation.bat
   - BambooCorePackageManualInstallation.bat
   - ManualInstallation.bat
   - ManualUninstallation.bat
2. To install, right-click on each file below and select **Run as Administrator**.
   - **BambooAJAXConfigManualInstallation.bat**: This file installs Bamboo AJAX components. After installing, navigate to SharePoint Central Administration and activate the feature to apply AJAX changes to the desired Web application's web.config file. **Note:** Do not run this .bat file if Bamboo AJAX is already deployed and configured on the desired Web application.
   - **BambooCorePackageManualInstallation.bat**: This file installs Bamboo core assemblies, such as Bamboo.Logging.dll, Telerik.Web.UI.dll, and Rad.Ajax.Net2.dll. This feature does not need to be activated because it is a farm feature.
   - **ManualInstallation.bat**: This file installs the SharePoint Knowledge Base Solution Accelerator components on the server farm.

To manually uninstall SharePoint Knowledge Base Solution Accelerator:
From the \misc folder, right-click on ManualUninstall.bat and select **Run as Administrator**. This removes the SharePoint Knowledge Base Solution Accelerator components. It does not remove Bamboo.AJAX.config.wsp or Bamboo.Core.wsp.

Note: This .bat file does not deactivate the features for each .wsp package before the package is removed. If you do not want to reinstall the package at a later time, manually deactivate the feature in the site collection before removing the solution.

Manually Activating the Product Features for a Site Collection

Product feature activations can be done automatically at the site collection level when SharePoint Knowledge Base Solution Accelerator is installed. There are several reasons why you may need to manually activate (or deactivate) Bamboo product features:

- You opted out of automatic feature activation during installation.
- You add a new site collection and want to add Bamboo features to it.
- You want to remove Bamboo product features from an existing site collection.

To manually activate (or deactivate) Bamboo product features, follow the instructions below.

Note: You must be a SharePoint site collection administrator to activate or deactivate features. Site collection administrators are assigned in SharePoint Central Administration.

1. Install SharePoint Knowledge Base Solution Accelerator on the SharePoint server.
2. From the top-level site, navigate to **Site Actions > Site Settings > Site Collection Administration > Site Collection Features**.
3. Click **Activate** (or **Deactivate**) to activate (or deactivate) the following features for the entire site collection:
    - Bamboo KB Admin Site Template R2
    - Bamboo KB Client Site Template R2
    - Bamboo KB Accelerator Reporting Web Part
    - Bamboo Knowledge Base Accelerator
    - Bamboo Navigators Web Parts
    - Bamboo Data-Viewer Web Part
    - Bamboo Group Redirect

Upgrading SharePoint Knowledge Base Solution Accelerator

Click a section below to upgrade SharePoint Knowledge Base Solution Accelerator from previous versions to R2.0:

- Changes in SharePoint Knowledge Base Solution Accelerator R2.0
- Upgrading SharePoint Knowledge Base Solution Accelerator to R2.0 or Newer
- Optional Manual Customizations for SharePoint Knowledge Base Solution Accelerator R2.0

Changes in SharePoint Knowledge Base Solution Accelerator R2.0

In R2.0 the following Web Parts were added:

- **Data-Viewer Web Part**: This allows articles to be displayed in grid view and for filtering and sorting.
- **Group Redirect Web Part**: This allows Knowledge Base Administrators to redirect users to the KB Client site if end users try to access the KB Admin site.
- **SharePoint Navigators**: This allows the KB Admin and KB Client sites to be centralized in one location.
- **SharePoint Secure Trim Web Part**: This allows Administrators to set permissions in batches on the articles and categories.

A JavaScript **Bamboo_KB_Articles_2007.js** is added to allow Administrators the ability to adjust the width of the Article Category and Related Articles columns.

The **Bamboo KB Client Configuration List** is added to the KB Client site. This list allows users to select the option to use a specific account to access data on the KB Admin site and to allow anonymous access.

New sections are added to the left navigation:

- **Reporting**: Four reports are available for Administrators to analyze article usage.
- **Authors**: My Articles and All Articles are available under the Authors section to allow editors to manage their articles.
- **Manage Articles and Category Permissions**: This section allows Administrators to manage the permissions for the articles and categories in batches.

New columns are added:

- **Expiration Date** column is added to the Bamboo KB Articles list.
- **Need KB** column is added to the **Customize Bamboo Article Questions and Answers** Discussion Board.

Upgrading SharePoint Knowledge Base Solution Accelerator to R2.0 or Newer

**I. Run the upgrade from the Setup program.**

1. Stop the **World Wide Web Publishing Service** (W3SVC).

- From the **Start** menu, select **Administrative Tools > Services**.
- Right-click on the **World Wide Web Publishing Service** and select **Stop**.

2. From the Setup program, install the Prerequisite components. **Note:** Since SharePoint Navigators is used in R2.0, users are required to install both AJAX components.

3. Select <u>both</u> **SharePoint Knowledge Base Solution Accelerator** core components and click **Install**.
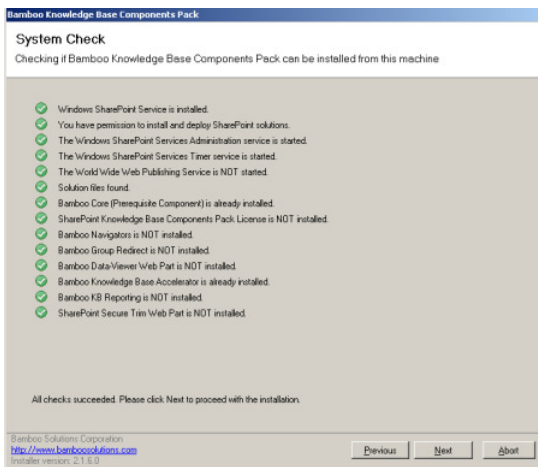
4. Click **Next** and wait while the system check is completed. Select the **Upgrade/Repair Existing and Install New** option, then click **Next**.
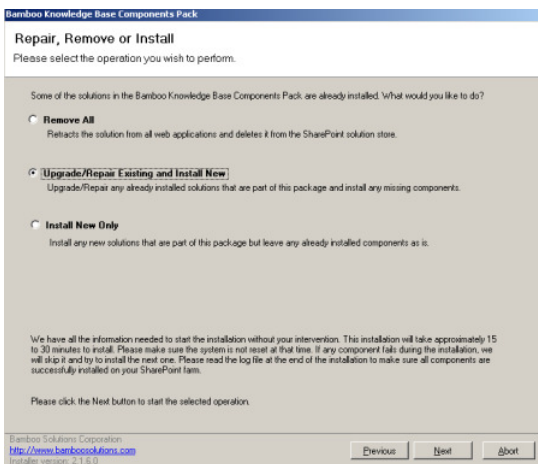
5. Wait while the components are upgraded and the new components (SharePoint Navigators, Group Redirect Web Part, Data-Viewer Web Part, SharePoint Secure Trim Web Part, etc.) are added.

6. Review the summary screen to ensure that the upgrade was successful, then click **Close**.

7. Restart the **W3SVC**.

II. Manually upgrade the KB Admin and KB Client sites.

Warning:

When the KB Admin site is first displayed in the browser, you will see no changes to the site, such as centralized tabs, until you follow the manual steps below to configure and upgrade the KB Admin site:
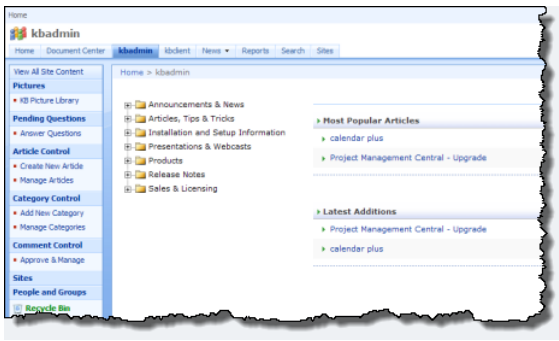
When the KB Client site is first displayed in the browser, you will see the following errors until the KB Admin and KB Client sites have been manually configured.
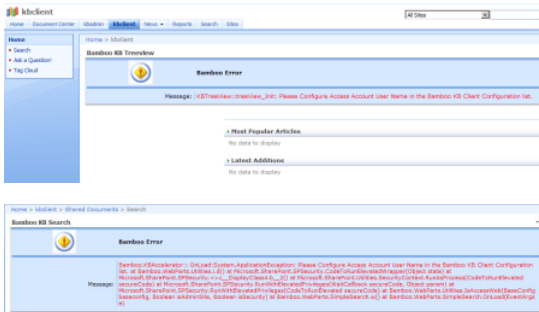
Follow the steps below to upgrade the KB Admin site:

1. From the KB Admin site home, edit the **KB Tree View Web Part**. In the tool pane, click **Upgrade KB Admin site and content**.
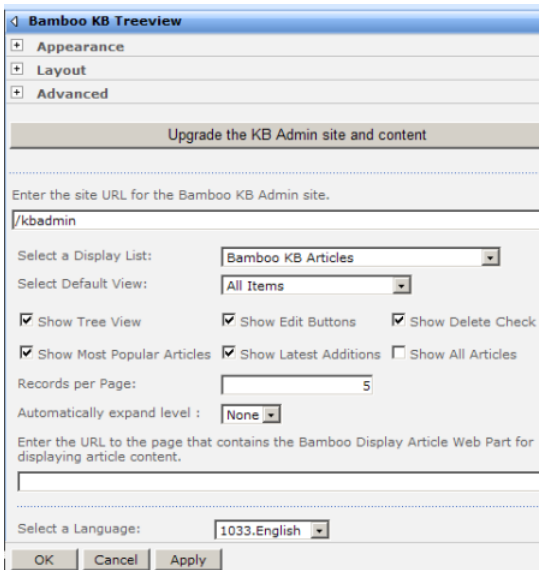
After the upgrade is completed, a message is displayed indicating that the upgrade was successful. The Upgrade button in the tool pane will then be grayed out. The KB Admin site's content is stored in the KB Admin Upgrade History list.

Click **Apply** and then **OK**. **Note:** During the upgrade, if **Internet Information Services** (IIS) is restarted, it will interrupt this upgrade process. Click on the Upgrade button to run the upgrade again.

2. From the **Quick Launch**, click **All Site Content**, then click **KB Admin Upgrade History** List. The status should be **Success**, and you should see the following:

- New sections added to the left navigation pane: Reporting, Authors, and Manage Articles and Category Permissions.
- New JavaScript (**Bamboo_KB_Articles_2007.js**) added to the Shared Documents Library.
- New **Bamboo Navigators** List and **KB Admin Upgrade History** List.
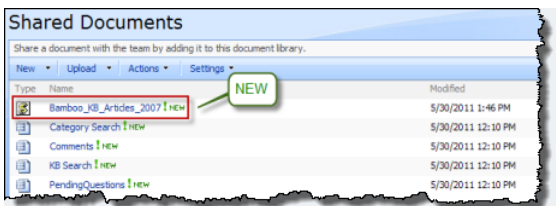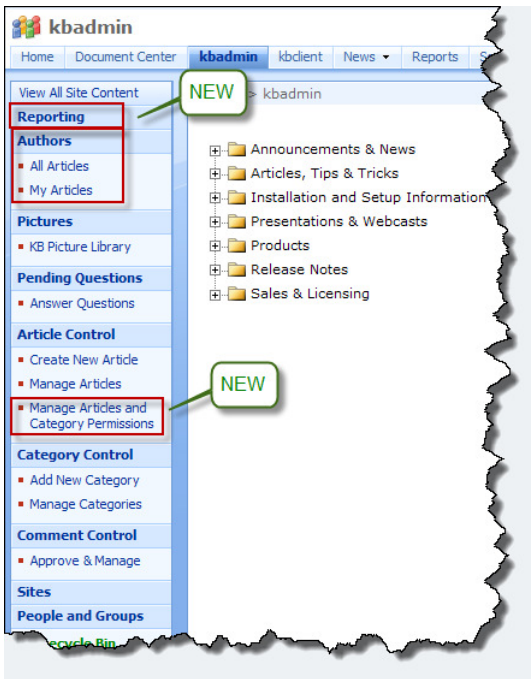
3. The upgrade process for the KB Admin site is complete.

Follow the steps below to upgrade the KB Client site:

1. From the KB Client site home, edit the **KB Tree View Web Part**. In the tool pane, click **Upgrade KB Client site and content**.
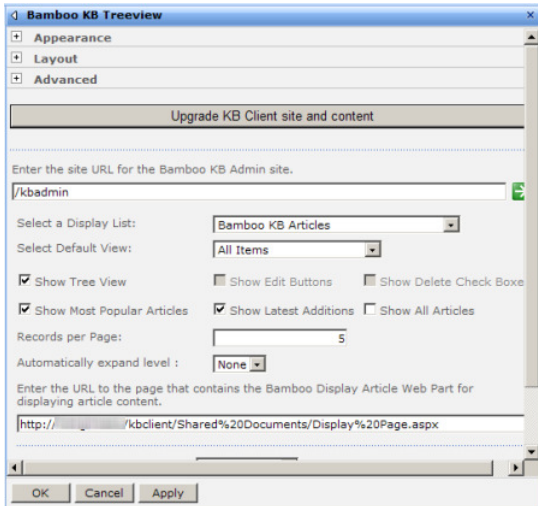
After the upgrade is completed, a message is displayed indicating that the upgrade was successful. The Upgrade button in the tool pane will then be grayed out. The KB client site's content is stored in the KB Client Upgrade History list.

Click **Apply** and then **OK**. **Note:** During the upgrade, if **Internet Information Services** (IIS) is restarted, it will interrupt this upgrade process. Click on the Upgrade button to run the upgrade again.

2. Navigate to the KB client site's Lists by typing the following URL in a new browser window: http://<servername/clientsitename>/_layouts/viewlists.aspx. Then click **KB Client Upgrade History** List. The status should be **Success**.

3. In R2.0, the application is no longer set up using the revert application pool to access data from the admin site. You can either allow groups to access certain data and lists in the KB Admin site, or you can use a specific account to access data. The configuration for either option is configured in the new **Bamboo KB Client Configuration** list. The option is defaulted to **Yes**, where an account is needed to add to this list, or you can change the option to **No**. (**Note**: This is the reason why you see the errors mentioned above—an account was not yet configured to access the data from the KB Admin site.)

Navigate to the KB Client site's lists by entering the following in a new browser window: http://<servername/clientsitename>/_layouts/viewlists.aspx. Then click the **Bamboo KB Client Configuration** List. Select **Use a Designated Account to Access Data** if you want to use a designated account to search and display articles from the KB Admin site, or if you want to allow anonymous access to the KB Client site. In the **Access Account** field, enter the account that will be used to access data from the KB Admin site. You must first select the **Use a Designated Account to Access Data** option. Click **Save**. To add this account to the Read-Only access group, see Security Trimming for more information.
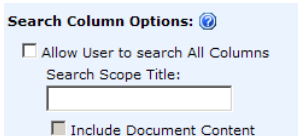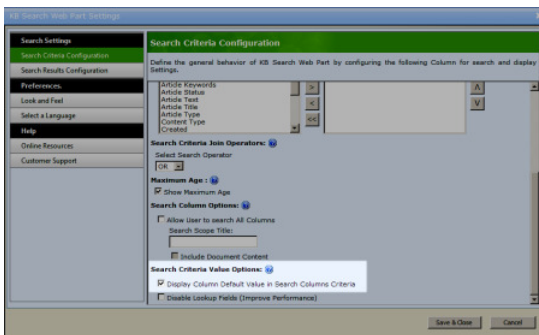

III. Manually configure the Web Parts in the KB Admin and KB Client sites.

To manually configure the Web Parts on the KB Admin site:

1. For the **Manage Articles, Manage Categories** and **Approve & Manage** sections, modify the **KB Search Web Part**:

- In the tool pane, click **KB Search Web Part Settings**. **Note:** You must disable pop-up blockers for the site to display the Web Part Settings.
- In the Web Part Settings, select **Search Results Configuration**. Under **Search Results Options**, select **Display both search criteria and search results**, only if **Search All Columns** is enabled in the **Search Criteria Configuration**. Unchecking this option replaces the search form with the search results. If users are allowed to search in all columns, where the server's search scope is set up, the option "Use SharePoint Search results view" will replace the KB Search results grid view with the SharePoint Server Search results view. If desired, choose to export search results to Microsoft Excel or to print the results. See Configuring the KB Search Web Parts for more information.
- Click **Save & Close** to close the Web Part Settings, then click **Apply** and then **OK** to stop editing the Web Part.
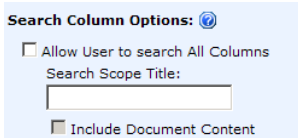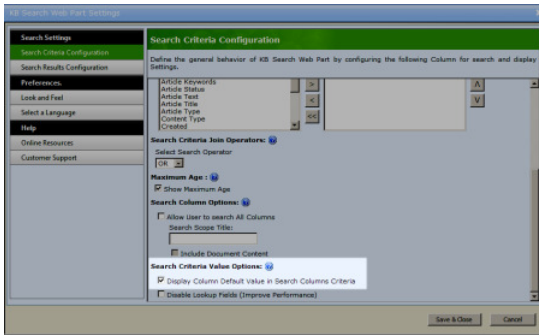

To manually configure the Web Parts on the KB Client site:

1. Click the **Search** link on the left navigation. Modify the **KB Search Web Part**:

- In the tool pane, click **KB Search Web Part Settings**. **Note:** You must disable pop-up blockers for the site to display the Web Part Settings.

- In the Web Part Settings, select **Search Results Configuration**. Under **Search Results Options**, select **Display both search criteria and search results**, only if **Search All Columns** is enabled in the **Search Criteria Configuration**. Unchecking this option replaces the search form with the search results. If users are allowed to search in all columns, where the server's search scope is set up, the option "Use SharePoint Search results view" will replace the KB Search results grid view with the SharePoint Server Search results view. If desired, choose to export search results to Microsoft Excel or to print the results. See Configuring the KB Search Web Parts for more information.
- Click **Save & Close** to close the Web Part Settings, then click **Apply** and then **OK** to stop editing the Web Part.

TOP

Optional Manual Customizations for SharePoint Knowledge Base Solution Accelerator R2.0

Note: The following customizations are optional.

I. Centralize the tabs for the KB Admin and KB Client sites.

The KB Admin and KB Client sites exist as two individual sites. You can create two tabs in one centralized place for easy access to each site by following the steps below:

Note: The centralized tabs are available with the site templates in R2.0. With older site templates such as R1.5, you are required to perform some manual steps.

1. Open Microsoft SharePoint Designer 2007. **Note**: Microsoft SharePoint Designer 2010 will not work with SharePoint 2007. For more information, see this Microsoft article on inserting or deleting Web Parts using SharePoint Designer.
2. Open default.master from the **_Catalogs\masterpage** folder within the admin site where SharePoint Knowledge Base Solution Accelerator is installed. Show the Web Parts by going to the **Task Panes** from the menu and selecting **Web Parts**.
3. Select **Bamboo Navigator TabStrip Web Part** from the right pane, then click **Insert Selected Web Part**. Insert the Web Part before the **</td>** in the tag that contains **ms-banner**.


   The end result should be:

   Under **Customization**, select **Edit File**.

   - Configure the Web Part by right-clicking on it and selecting **Web Part Properties**.
   - Configure the Web Part as indicated below. Click **OK**.
     - o Select List: Bamboo Navigators
     - o Select View: All Items
     - o Menu Title: Menu Title
   - o Description: Description

- o URL Link: URL
- o Parent Menu: Parent Menu
- o Sort Order: Sort Order
- o URL Icon: Icon URL
- o Select Skin: Default
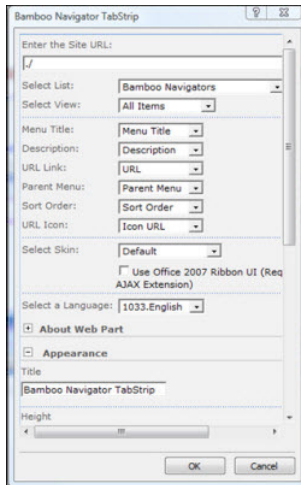
To hide the title of the **Bamboo Navigator TabStrip**, select **None** for **Chrome Type** under **Appearance**.
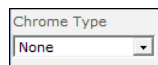
4. Save the master page.
5. Follow Steps 2-4 above to add the **Bamboo Navigator TabStrip** to the KB Client site using SharePoint Designer.
6. Change the URL of the KB Client site on the KB Admin site.
   - From the KB Admin site, click **All Site Content**, then select the **Bamboo Navigators** list.
   - Click on the **KB Client** item and edit the URL. The URL should be the relative path to the KB Client site, such as **../kbclient/default.aspx**.
   - The two tabs should now be displayed:
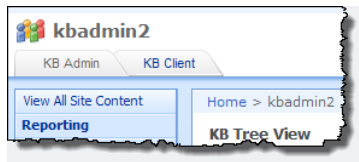
7. Change the URL of the KB Admin site on the KB Client site.
   - From the KB Client site, navigate to the KB Client site's lists by entering the following in a new browser window: http://<servername/clientsitename>/_layouts/viewlists.aspx
   - Select the **Bamboo Navigators** list, then click on the **KB Admin** item and edit the URL. The URL should be the relative path to the KB Admin site, such as **../kbadmin/default.aspx**. If desired, you can hide the KB Admin tab from end users by changing the permission for the KB Admin item.

To remove the top navigation links:
If you have KB sites that were created as subsites and not as the top site in a site collection, you can remove the top navigation links using SharePoint Designer:

Enter the following tag right after "AllowMultipleControls="true"/> and before </HEAD>:

<style type="text/css">

#HBN100{ display:none;}

</style>
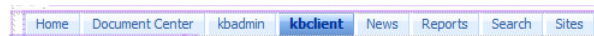
II. Redirect end users to the KB Admin site.

If desired, add the Group Redirect Web Part to the KB Admin site home to redirect end users from the KB Admin site.

- Edit the KB Admin home page. In the zone where you want to add the Web Part, select **Add a Web Part**.
- From the dialog box that is displayed, select **All Web Parts > Bamboo Solutions > Bamboo Group Redirect Web Part**. Click **Add**.
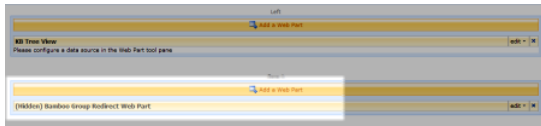
- Edit the Web Part and configure it according to the instructions in [Configuring the KB Admin Site](#). To hide the Web Part, select the **Hidden** option in the tool pane under **Layout**.
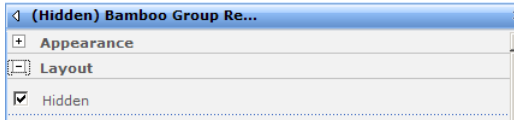

- Click **Apply** and then **OK** to save your changes.

**III. Manually change the width of the Related Articles and Article Category fields.**

The width of the Related Articles and Article Category fields can be modified using SharePoint Designer so that full article titles and categories are visible.

To modify the width of the fields:

1. Open the KB Admin site using Microsoft SharePoint Designer 2007.
2. Open **EditForm.aspx** and **NewForm.aspx** under **/Lists/Bamboo KB Categories/** and **/Lists/Bamboo KB Articles/**.
3. From the Web Parts pane, select **Insert Web Part Zone**. Next, under **Web Part**, select **Content Editor Web Part** and click **Insert Selected Web Part**.
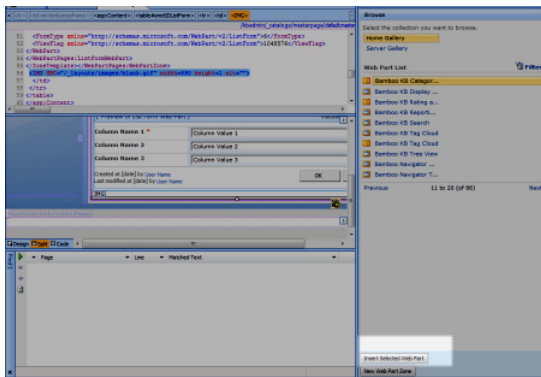

4. Right-click on the Web Part and select **Web Part Properties**. Under **Content Link**, click on the ... and browse to **Shared Documents > Bamboo_KB_Articles_2007.js**. Click **OK** and save the page.
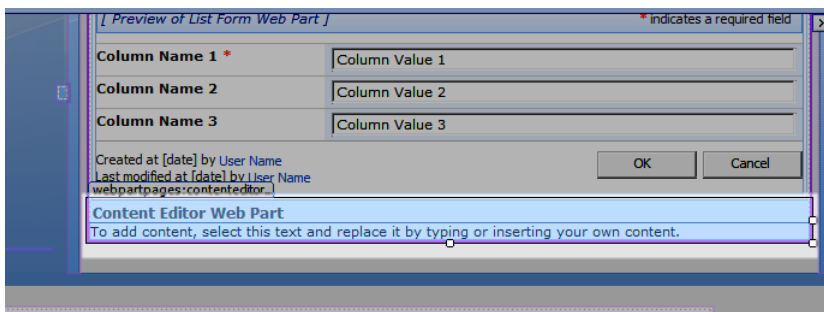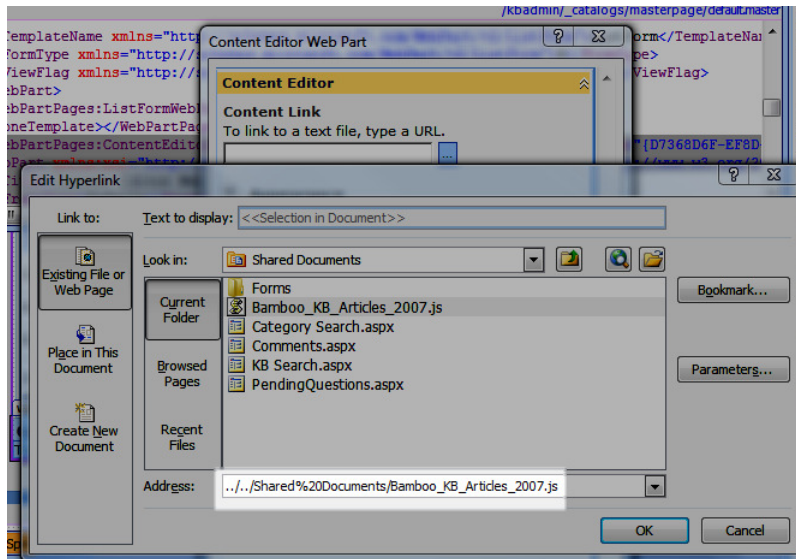
5. Return to the KB Admin site and navigate to the Shared Documents Library. Click **Bamboo_KB_Articles_2007.js** to download it to a local folder. Use Notepad to edit and change the **var maxLimitWidth** value to your desired points, such as from 100 to 250. Save the file and upload it to the Shared Documents Library. The Related Articles and Article Category fields are now widened.
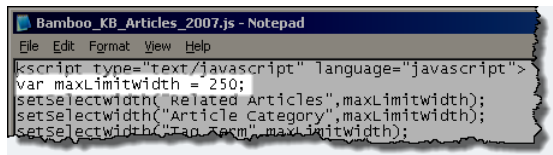
Creating the Knowledge Base Administration Site (Bamboo KB Admin Site Template)

You must have appropriate permission to create sites within your SharePoint site collection in order to create the Bamboo KB Admin site.

1. From the top level site, click **Site Actions** > **Site Settings**.
2. Select **Sites and Workspaces** under Site Administration.
3. Click **Create**.
4. Set up your site with the Title, Description and Web Site Address that you want.
5. For Template Selection, click the **Custom** tab and select the **Bamboo KB Admin Site Template**.
6. Set the Permissions, Navigation and Navigation Inheritance options that you want.
7. Click **Create**.

Choosing a Bamboo KB Client Site Template

There are two KB Client site templates for you to choose from:

- Bamboo KB Client based on Team Site (KB Client Site Template - Team Site) or
- Bamboo KB Client based on Basic Meeting Workspace (KB Client Site Template - Meeting Workspace).

There are only slight differences in the configuration of the two site templates, so choose the one that is right for your SharePoint environment.

These configuration differences include:

- **The location of the Display.aspx page for the KB Display Article Web Part.** This URL is used in the Bamboo KB Tree View and Bamboo KB Search Web Parts tool pane configuration. This URL enables article content to be displayed in the Bamboo KB Display Article Web Part which provides a nice format that allows the user to view the article contents as well as e-mail or print the article.
    o The KB Display Article Web Part in the KB Client - Meeting Workspace is located at the following URL:

    http://Your_KBClient_Site_URL/KBClient/Display%20Page.aspx

    o The KB Display Article Web Part in the KB Client - Team Site is located at the following URL:

    http://Your_KBClient_Site_URL/KBClient/Shared%20Documents/Display%20Page.aspx

    o **Navigation (Tabs and Quick Launch)**
        o **For the KB Client - Meeting Workspace:** You can change only the tab order of the Search and Ask a Question tabs. The Home tab order cannot be changed. Just go to Site Actions > Manage Pages to change the order. You cannot change the names of the tabs either.
        o **For the KB Client - Team Site:** You can change the order in which the links are displayed as well as the names of the links for the Home, Search and Ask a Question links. It is recommended that you do not change the names or URLs of the Search and Ask a Question links. The Home link

name and URL can be changed. To edit the links, go to Site Actions, then select Quick Launch under the Look and Feel section.

Creating the Knowledge Base Client Site (Bamboo KB Client Site Template)

You must have appropriate permission to create sites within your SharePoint site collection in order to create the Bamboo KB Client site.

1. From the top level site, click **Site Actions** > **Site Settings**.
2. Select **Sites and Workspaces** under Site Administration.
3. Click **Create**.
4. Set up your site with the Title, Description and Web Site Address that you want.
5. For Template Selection, click the **Custom** tab and select the **Bamboo KB Client Site Template - Meeting Workspace** or **Bamboo KB Client Site Template - Team Site**. (See Choosing a Bamboo KB Client Site Template to determine which template you want to use.)
6. Set the Permissions, Navigation and Navigation Inheritance options that you want.
7. Click **Create**.

Uninstalling the SharePoint Knowledge Base Solution Accelerator Components

To uninstall the SharePoint Knowledge Base Solution Accelerator Components:

1. Double-click the **Setup.bat** program included in the product download ZIP file.
2. From the SharePoint Knowledge Base Solution Accelerator Setup program screen, click the **Knowledge Base Components** button under the Components section, and then click **Install**.
3. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select **Remove,** and click **Next**.

Locating the Error Log File(s)

If you encounter any errors in the process of using this Web Part, refer to the error logs located in *drive:*\\WINDOWS\Temp\BambooSolutions\bsc_bamboo_*processid*.log on the SharePoint server.

Installed Files

The table below lists the files and where they are installed as part of KB Accelerator's installation package.

Each product has a Bamboo.**ProductName**.Core.dll. This core.dll contains shared assemblies such as Bamboo.Logging.dll, Bamboo.Licensing.dll and Bamboo.Provisioning.dll. All Bamboo products use these shared assemblies, which are installed under the Bamboo.**ProductName**.Core.dll in the GAC. Each product's Core.dll contains these shared assemblies so that each product can be removed or rolled back without affecting other Bamboo products. For example, if both KB Accelerator and the Calendar Plus Web Part are installed in the same farm, the Calendar Plus Web Part can be uninstalled or rolled back and KB Accelerator will continue to function without any issues.

Filename	Type	Purpose
Bamboo.KBAccelerator.dll	Assembly	Solution Accelerator Assembly installed in the GAC
Bamboo.BatchUpdateItemPermission.Core.dll	**Assembly**	**Web Part Assembly installed in the GAC**
Bamboo.DataViewDataSourceControl.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.GroupRedirect.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.KBAccelerator.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.KBAcceleratorPack.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.KBAcceleratorPack.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.KBAReporting.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.Navigators.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.Navigators.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.SPGridView.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.AJAX.Config.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.WordExtraction.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.WordExtraction.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.KBEventReceiver.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.KBFullTextSearch.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.BatchUpdateItemPermission.dll	Assembly	Web Part Assembly installed in the Bin
Bamboo.GroupRedirect.WebPart.dll	Assembly	Web Part Assembly installed in the Bin
Bamboo.KBAReporting.dll	Assembly	Web Part Assembly installed in the Bin
Bamboo.SPGridView.dll	Assembly	Web Part Assembly installed in the Bin
Bamboo.Logging.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.UI.Licensing.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.UI.Licensing.Core.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.RussellMason.Web.Application.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.Telerik.Web.UI.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.Core.wsp		In case you need to install this component manually.
Bamboo.Web.Licensing.wsp		In case you need to install this component manually.
SA05.KBReporting.wsp		In case you need to install this component manually.
SA05.KBAcceleratorPack.wsp		In case you need to install this component manually.

HW55.BambooNavigators.wsp	In case you need to install this component manually.
HW37.Dataviewer.wsp	In case you need to install this component manually.
HW12.Bamboo.GroupRedirect.wsp	In case you need to install this component manually.
Bamboo.WordExtraction.wsp	In case you need to install this component manually.
Bamboo.AJAX.Config.wsp	In case you need to install this component manually.
Bamboo.BatchUpdateItemPermission.wsp	In case you need to install this component manually.
SA05.KBAccelerator.wsp	In case you need to install this component manually.

TOP

Updating the web.config File

The installation process also updates the web.config file. If you cannot install the Solution Accelerator using the automated process and plan to install it manually, add the following to your web.config file:

```
<SafeControl Assembly="Bamboo.Navigators, Version=1.0.0.0, Culture=neutral, PublicKeyToken=2cc91efae2d531be" Namespace="Bamboo.WebParts"
TypeName="*" Safe="True" SafeAgainstScript="True" />
```

```
<SafeControl Assembly="Bamboo.KBAccelerator, Version=1.0.0.0, Culture=neutral, PublicKeyToken=2cc91efae2d531be" Namespace="Bamboo.WebParts"
TypeName="*" Safe="True" SafeAgainstScript="True" />
```

TOP

Code Access Security

The following PermissionSet and CodeGroup markup may be installed by wppackager.

Class	Name	Version	Public Key Blob
StrongNameMembershipCondition	Bamboo.KBAccelerator	1	0x00240000048000009400000006020000002400005253413100040000010001009189C71722AEBE6ADF12BF1FF2828C9DC20BFB
StrongNameMembershipCondition	Bamboo.Licensing	1	002400000480000094000000060200000024000052534131000400000100010A76FDA645D3FCF461C428E0112290EABE802951AF

If you must install KB Accelerator manually, the following security in order to implement a custom security policy file:

Permission	Custom Setting
System.Web.AspNetHostingPermission	Level="Medium"
System.Security.Permissions.FileIOPermission	Unrestricted="true"
System.Security.Permissions.RegistryPermission	Unrestricted="true"
System.Security.Permissions.ReflectionPermission	Flags="3"
SecurityPermission	Unrestricted="true"
SharePointPermission	ObjectModel="True" UnsafeSaveOnGet="True" Impersonate="True"
WebPartPermission	Connections="True"
System.Security.Permissions.EnvironmentPermission	Read="TEMP;TMP;USERNAME;OS;COMPUTERNAME"

To set up your own custom security policies, refer to the following links for more information:

- Bamboo Solutions FAQ: Web Part Deployment and Security
- Microsoft Windows SharePoint Services and Code Access Security
- Security and Protection in WSS 3.0
- Security and Protection in MOSS 2007

TOP

Configuration

- Security Trimming
- Configuring the KB Admin Site
- Configuring the KB Client Site
- Configuring the KB Search Web Parts
- Using Relative Paths
- Localizing SharePoint Knowledge Base Solution Accelerator

Security Trimming

Click a section below for more information on configuring security in SharePoint Knowledge Base Solution Accelerator:

- Hiding the KB Admin Site
- Choosing to Use a Designated Account to Access Data
- Choosing Not to Use a Designated Account to Access Data

In general, users should follow SharePoint security trimming when setting up user permissions. Read the following Microsoft TechNet articles for more information:

- User Permissions and Permission Levels in Windows SharePoint Services 3.0
- User Permissions and Permission Levels in Microsoft Office SharePoint Server 2007

Hiding the KB Admin Site

Knowledge Base Administrators can set permissions so that the KB Admin site is completely hidden, and end users can only see the KB Client site.

1. From the KB Client site, select **All Site Content > Lists > Bamboo Navigators**.
2. Select the **KB Admin** item. Choose **Manage Permissions** from the edit context menu. Then click **Stop Inheriting Permissions**.
3. Click **OK**. You can now create unique permissions.
4. Remove permissions for each group <u>except</u> Owners with Full Control.
   - Select each group that you want to remove.
   - From the ribbon, click **Remove User Permissions**.
5. The KB Admin site is now hidden from the KB Client site. End users can no longer see the tab.

TOP

Choosing to Use a Designated Account to Access Data

This is the default option for security for the KB Client site. This selection can be made in the Bamboo KB Client Configuration List, located in the KB Client site.

Use this option if:

- You do not want different SharePoint groups or individual users to have access to the KB Picture Library or KB articles or categories.
- <u>And/or</u> you want to allow anonymous access to the KB Client site. (Note: Users using an anonymous login will not be able to view list items that have broken item permissions. A SharePoint access account for anonymous access is required.)

The KB Client site will display an error message after a new KB Client site is created or after an existing KB Client site is upgraded. Before the KB Client site can be viewed, the KB Client Configuration List must be modified, and an access account must be selected.

Security Configuration for the Access Account for the KB Admin Site
At the KB Admin site, the access account needs Read-Only access to the following:

- Bamboo KB Articles List
- Bamboo KB Categories List
- Bamboo KB Article View Counts List
- Bamboo KB Rating and Comments List
- Bamboo KB Tag Cloud List
- KB Picture Library

The access account needs Limited access to the KB Admin site.

The access account can read KB articles, categories and image links stored in the KB Picture Library. However, the access account does not have access to other KB Admin site pages, and the account cannot log into the KB Admin site with Limited access. Knowledge Base Administrators can grant the access account a higher level of permission, such as Read-Only access, if necessary.

Knowledge Base Administrators can allow the access account to read a specific number of articles in the KB Articles and KB Categories lists by breaking list item permissions and removing the access account's Read-Only permissions for those items. The items in the KB Articles and KB Categories lists that the access account can read and view in the KB Admin site can be read and viewed in the KB Client site.

Note: If the links to the images in a KB article are stored in a different library or list, then the access account must have permission to read the links from that library or list.

TOP

Security Configuration for the Access Account for the KB Client Site
Knowledge Base Administrators only need to grant Read-Only access to the KB Client site to other users or groups. The KB Client site also allows anonymous access. When these SharePoint users/groups or anonymous users access the KB Client site, searching for and displaying KB articles is based on the access account permission to the KB Admin site.

For example, a Knowledge Base Administrator creates a different SharePoint group and grants Read-Only access to that group in the KB Client site. The following SharePoint users/groups have Read-Only or higher permissions to the KB Client site. They can access the KB Client site, and they have access to all of the pages in the site.

- Forum Lock
- PMGReview Members
- PMGReviewVisitorTop
- SPUser1
- SPUser3

TOP

Protecting the Identity of the Access Account
Knowledge Base Administrators can remove SharePoint group/users' access to the KB Client Configuration List to ensure that the identity of the access account remains unknown.

TOP

Choosing Not to Use a Designated Account to Access Data

Knowledge Base Administrators can choose not to use a designated account to access data, but they must make the following configurations:

- KB Client site: Grant Read-Only access to the KB Client site for SharePoint users/groups

- KB Admin site: Grant the following permissions to the same SharePoint users/groups:
  - Read-Only access to the following: Bamboo KB Articles List, Bamboo KB Categories List, KB Picture Library
  - Limited access to the KB Admin site

Knowledge Base Administrators can also break item permissions for the KB Articles and KB Categories lists and allow certain groups to see those items. For example, an Administrator wants to allow the SharePoint group "Sales" to have read access to the Sales KB category and to all KB articles in the Sales category. The Administrator filters the list view of the KB Articles List to locate these items. Then the Administrator breaks item permissions for each item and removes access for all SharePoint groups except the Sales group. The Administrator then applies the same permissions in the KB Categories List.

TOP

Security Configuration for Other Lists in the KB Admin Site
The Administrator does not need to grant permission to any user/group from the KB Client site to the following lists:

- Bamboo KB Configuration List
- Bamboo Article Questions and Answers

SharePoint Knowledge Base Solution Accelerator reverts to the application pool account to read and write information to these lists. Administrators can stop inheriting site permissions for these lists and can remove KB Client users/groups' access to these lists as desired.

TOP

Security Configuration for Group Redirect Web Part and Bamboo Navigator TabStrip in KB Admin Site
Knowledge Base Administrators can use the Group Redirect Web Part to redirect end users back to the KB Client site if they try to access the KB Admin site. See Configuring the KB Admin Site for more information.

TOP

Configuring Site Permission for the KB Admin Site
Knowledge Base Administrators should grant Read-Only access to SharePoint groups with Limited Access so that this group can view the home KB Admin site home in order to redirect end users to the KB Client site using the Group Redirect Web Part. This redirection is only performed at the KB Admin site home. Users in the SharePoint group can still access other pages in the KB Admin site if they know the URLs for those pages. The Administrator can choose to remove this group from other lists and libraries.

TOP

Bamboo Navigator List and Item Permissions in the KB Admin Site
By default, SharePoint groups with Limited Access will have Read-Only permissions to the Bamboo Navigators List. Knowledge Base Administrators are not required to perform additional steps for this list.

TOP

Bamboo Navigator List and Item Permissions in the KB Client Site
SharePoint groups with Limited Access should already have access to the KB Client site's Bamboo Navigators List. Administrators can remove this group's permission to the KB Admin site by performing the steps below:

1. From the KB Client site, select **All Site Content > Lists > Bamboo Navigators**.
2. Click the KB Admin item. From the item context menu, select **Manage Permissions**.
3. Select the desired users/groups and select **Remove User Permissions** to break permissions. Members of this group will only see the KB Client site tab when they log in.

TOP

Configuring the KB Admin Site

The KB Admin and KB Client sites are actually tabs located in the same site for easy, centralized access. Configure the KB Admin site before using it.

Click on a section below for more information:

- Creating the KB Admin Site
- Configuring the KB Client Site URL
- Configuring the Group Redirect Web Part
- Configuring the KB Article Search Web Part
- Configuring the KB Category Search Web Part
- Configuring the KB Comment Search Web Part
- Configuring the KB Configuration List
- Configuring the KB Tree View Web Part
- Configuring the KB Answer Questions Web Part

Creating the KB Admin Site

To create the KB Admin site:

1. Navigate to the top site in the site collection where you want to create the KB Admin site.
2. Select **Site Actions > Site Settings > Site Administration > Sites and workspaces**.
3. Enter a Title, an optional Description and a Web Site Address for your site.
4. Under **Template Selection > Custom**, select **Bamboo KB Admin Site Template R2**.
5. Choose your permissions and navigation.
6. Click **Create**.

Configuring the KB Client Site URL

In order to centralize the KB Admin and KB Client sites, the KB Client site URL must be changed in the KB Admin site before the KB Client site can be configured or used.

To change the URL for the KB Client site:

1. Create the KB Client site.
2. From the KB Admin tab, click **All Site Content**. Under **Lists**, select **Bamboo Navigators**, then click **KB Client**.
3. Click **Edit Item**. In the **URL** field, enter the relative path for the KB Client site, such as *../kbclient/default.aspx*. Bamboo recommends using relative paths. Do not modify the Titles of the list items in the Bamboo Navigators List. Doing so will affect the Bamboo KB Tree View Web Part.

Configuring the Group Redirect Web Part

The Group Redirect Web Part enables security trimming for the KB Admin site. This is an optional step that allows Knowledge Base Administrators to prevent end users from accessing the KB Admin site. End users who attempt to access the KB Admin site will automatically be redirected back to the KB Client site.

To configure the Group Redirect Web Part:

1. From the KB Admin site, select **Site Actions > Edit Page**.
2. Edit the hidden Bamboo Group Redirect Web Part.
3. In the tool pane under **Group Redirect Configuration**, provide the information listed below, then click **Connect**.
    - a domain name
    - an account name
    - a password
4. Set the rules for the redirect criteria:
    - Choose **Is** or **Not** depending on whether you want the group you add to be included or excluded from the redirect. For example, if you select **Is** + **SP Group** + **[Site] Visitors**, then the [Site] Visitors SharePoint group will be redirected away from the KB Admin site. If you select **Not** for this same criteria, then all other groups except the [Site] Visitors will be redirected to the KB Client site.
    - Select **SP Group** or **AD Group** and choose the group to be included in the rule. To add more groups, click **Add More Groups** and select **AND** or **OR**.
    - Enter the site URL for the KB Client site. Users who do not have permission to view the KB Admin site will be redirected to the KB Client site.
5. Click **Add More Criteria** to add additional criteria rules, if desired.
6. Click **Apply** and then **OK** to save your changes.

Configuring the Group Redirect Web Part is optional. If you do not want to use the Group Redirect Web Part, you can delete the Web Part from the page. Or, in the tool pane under **Redirect Rules Criteria**, choose **None** for the group, then enter "." in the **Redirect to** field.

See the Group Redirect Web Part online documentation for more information.

Configuring the KB Article Search Web Part

The KB Article Search Web Part is used to search for KB articles. The Web Part is located by clicking the **Manage Articles** link under **Article Control** on the left-hand navigation bar in the KB Admin site.

1. From the Quick Launch bar, click the **Manage Articles** link.
2. Edit the Web Part by clicking the arrow located in the top right corner of the **Article Search** title bar and selecting **Modify Shared Web Part**.
3. In the tool pane, click the **KB Search Web Part Settings** button to display the Web Part Settings page. **Note:** You must disable pop-up blockers for the site to display the Web Part Settings.
4. Configure the Web Part Settings. See Configuring the KB Search Web Parts for more information.
5. Click **Save & Close**, then click **Apply** and then **OK** to save your changes.

Configuring the KB Category Search Web Part

The KB Category Search Web Part is used to search categories. The Web Part is located by clicking the **Manage Categories** link under **Category Control** on the left-hand navigation bar in the KB Admin Site. Follow the instructions for configuring the KB Article Search Web Part above.

Configuring the KB Comment Search Web Part

The KB Comment Search Web Part is used to search comments. The Web Part is located by clicking the **Approve & Manage** link under **Comment Control** on the left-hand navigation bar in the KB Admin Site. Follow the instructions for configuring the KB Article Search Web Part above.

Configuring the KB Configuration List

To configure the KB Configuration List:

1. From the KB Admin site, select **All Site Content**. Under **Lists**, select **Bamboo KB Configuration List**.
2. Edit the **KB Default Settings** by selecting **Edit** from the drop-down list, or use the ribbon by selecting **Item > Edit Item**.
3. Enter the following information:
   - Enter a **Title** or leave the default title. This is a required field.
   - In the **SMTP Server Name** field, enter the name of the SMTP server for sending e-mail.
   - In **Email From Account**, enter the e-mail address that you want displayed in the **From** field of the e-mail. This address must be in the correct e-mail address format (i.e. email@domain.com).
   - Leave the **Auto Archive Date** field blank. This field is reserved for an upcoming feature.
4. Click **Save**.

Configuring the KB Tree View Web Part

To configure the KB Tree View Web Part:

1. From the **KB Admin site**, edit the KB Tree View Web Part.
2. Configure the Web Part:
   - **Enter the site URL for the Bamboo KB Admin site:** This field is already populated for you with the relative path URL. See Using Relative Paths for more information on the syntax for relative paths.
   - **Select a Display List:** This field is already preselected for you with the **Bamboo KB Articles** list.
   - **Select Default View:** Select the list view that you would like displayed in the **Most Popular Articles** list and the **Latest Additions** list.
   - **Show Tree View:** Toggles showing the category for navigating the Knowledge Base content.
   - **Show Edit Buttons:** Toggles showing the **Edit** button for each article in the **Most Popular Articles** list and the **Latest Additions** list.
   - **Show Delete Check Boxes:** Toggles showing the check boxes used for selecting and deleting articles in the **Most Popular Articles** list and the **Latest Additions** list.
   - **Show Most Popular Articles:** Toggles showing the **Most Popular Articles** list, which shows articles that have had the most views.
   - **Show Latest Additions:** Toggles showing the **Latest Additions** list, which shows the articles that were recently added to the Knowledge Base.
   - **Show All Articles:** Select this option to show the **All Articles** list, which displays all articles in the Knowledge Base with paging according to the **Records per Page** value. When you select a category in the tree, the **All Articles** list shows all articles for that category and all of its subcategories.
   - **Records per Page:** Enter the number of articles you want listed at a time in the **Most Popular Articles** list, **Latest Additions** list and the **All Articles** list.
   - **Automatically expand level:** Choose how many items you want to be displayed by default in the tree view.
   - **Enter the URL to the page that contains the Bamboo Display Article Web Part for displaying article content:** This field is used for the KB Client site only. Make sure that you enter a relative path for the URL.
   - **Select a Language:** Select this option to set the language used on the user interface of this Web Part. See Localizing KB Accelerator for more information.
3. Click **Apply** and then **OK** to save your changes.

Configuring the KB Answer Questions Web Part

The KB Answer Questions Web Part is located by clicking the **Answer Questions** link under the **Pending Question** header on the left-hand navigation bar in the KB Admin site.

To configure the Bamboo KB Answer Questions Web Part:

1. From the Quick Launch bar, click the **Answer Questions** link.
2. Edit the Web Part by clicking the arrow located next to the Web Part title bar and selecting **Edit Web Part**, or use the ribbon to edit the page.
3. Configure the Web Part:
   - **Select a Question and Answer List:** This is preconfigured to point to the **Bamboo Article Questions and Answers** discussion board list.
   - **Select a Configuration List:** Choose a list such as the **Bamboo KB Configuration List**.
   - **Select Picture Library:** This is preconfigured to point to the KB Picture Library. This setting allows you to include images in your response back to the end user and/or the discussion board. These images can be inserted directly into your response and no longer have to be uploaded to a Picture Library before you can reference them.
   - **Show Answer Question Buttons:** Toggles showing the **Answer Question** button next to the question.
   - **Show Delete Check Boxes:** Toggles showing the check boxes used for selecting and deleting questions in the list.
   - **Use SMTP Secure Authenticated Connection:** Select this option to enter in credentials for SMTP authentication.
     - **User ID:** Enter in the user ID.
     - **Password:** Enter in the password for the user ID.
     - **Port:** Enter in the port number.
   - **Records per Page:** Enter the number of questions you want to display at a time in the **KB Answer Questions Web Part**.
   - **Select a Language:** Select this option to set the language used on the user interface of this Web Part. See Localizing KB Accelerator for more information.
4. Click **Apply** and then **OK** to save your changes.

Configuring the KB Client Web Parts

The KB Admin and KB Client sites are actually tabs located in the same site for easy, centralized access. Configure the KB Client site before using it.

Click on a section below for more information:

Creating the KB Client Site

To create the KB Client site:

1. Navigate to the top site in the site collection where you want to create the KB Client site.
2. Select **Site Actions > Site Settings > Site Administration > Sites and workspaces**.
3. Enter a Title, an optional Description and a Web Site Address for your site.
4. Under **Template Selection > Custom**, select **Bamboo KB Client Site Template R2**.
5. Choose your permissions and navigation.
6. Click **Create**.

Configuring the KB Admin Site URL

In order to centralize the KB Admin and KB Client sites, the KB Admin site URL must be changed in the KB Client site.

To change the URL for the KB Client site:

1. Create the KB Admin site.
2. From the KB Client tab, click **All Site Content**. Under **Lists**, select **Bamboo Navigators**, then click **KB Admin**.
3. Click **Edit Item**. In the **URL** field, enter the relative path for the KB Admin site, such as *../kbadmin/default.aspx*. Do not modify the Titles of the list items in the Bamboo Navigators List. Doing so will affect the Bamboo KB Tree View Web Part.
4. Choose which groups/users can access the KB Admin site by setting the permissions for the KB Admin link. In the Bamboo Navigators List, select **Manage Permissions** from the edit menu. Select all groups except Home Owners, then click **Remove User Permissions** from the Action menu.

Configuring the KB Tree View Web Part

To configure the **KB Tree View Web Part**:

1. From the KB Client site, edit the KB Tree View Web Part.
2. Configure the Web Part:
   - **Enter the site URL for the Bamboo KB Admin site:** Enter the relative path to the KB Admin site and click the green arrow to populate the fields below.
   - **Select a Display List:** Select the **Bamboo KB Articles** list.
   - **Select Default View:** Select the list view that you want to be displayed in the **Most Popular Articles** list and the **Latest Additions** list. The **Summary View** is recommended.
   - **Show Tree View:** Toggles showing the category for navigating the Knowledge Base content.
   - **Show Edit Buttons:** This option is not available to end users.
   - **Show Delete Check Boxes:** This option is not available to end users.
   - **Show Most Popular Articles:** Toggles showing the **Most Popular Articles** list, which shows articles that have had the most views.
   - **Show Latest Additions:** Toggles showing the **Latest Additions** list, which shows the articles that were recently added to the Knowledge Base.
   - **Show All Articles:** Select this option to show the **All Articles** list, which displays all articles in the Knowledge Base with paging according to the **Records per Page** value. When you select a category in the tree, the **All Articles** list shows all articles for that category and all of its subcategories.
   - **Automatically expand level:** Choose how many items you want to be displayed by default in the tree view.
   - **Records per Page:** Enter the number of articles you want listed at a time in the **Most Popular Articles** list, **Latest Additions** list and the **All Articles** list.
   - **Enter the URL to the page that contains the Bamboo Display Article Web Part for displaying article content:** This field is prepopulated with the relative path to the Display Article Web Part.
   - **Select a Language:** Select this option to set the language used on the user interface of this Web Part. See [Localizing SharePoint Knowledge Base Solution Accelerator](#) for more information.
3. Click **Apply** and then **OK** to save your changes.

Configuring the KB Search Web Part

To search for articles, configure the **KB Search Web Part**.

1. From the Quick Launch bar, click the **Search** link. Edit the KB Search Web Part.
2. In the tool pane, click the **KB Search Web Part Settings** button to display the Web Part Settings page. **Note:** You must disable pop-up blockers for the site to display the Web Part Settings.
3. Configure the Web Part Settings. Note that the URL for the Bamboo Display Articles Web Part is prepopulated. See [Configuring the KB Search Web Parts](#) for more information.
4. Click **Save & Close**, then click **Apply** and then **OK** to save your changes.

Configuring the KB Ask a Question Web Part

To configure the **KB Ask a Question Web Part**:

1. From the KB Client site, click **Ask a Question**. Edit the Ask a Question Web Part.
2. Configure the Web Part:
   - **Enter the site URL for the Bamboo KB Admin site:** Enter the relative path to the KB Admin site, then click the green arrow to populate the **Select a Question and Answer List** drop-down box with the lists from the KB Admin site.
   - **Select a Question and Answer List:** Select the **Bamboo Article Questions and Answers** list.
   - **Ask a Question:** Enter instructive text for end users, such as "Ask a question" or "Enter your question here". This text appears in the top of the Submit a Question box.
   - **Header Text:** Enter the instructive text that you want displayed at the top of the Web Part to help users understand how Knowledge Base Administrators will respond to their questions.
   - **Select a Language:** Select this option to set the language used on the user interface of this Web Part. See Localizing SharePoint Knowledge Base Solution Accelerator for more information.
3. Click **Apply** and then **OK** to save your changes.

Configuring the KB Display Article Web Part

The Display Article Web Part allows articles to be viewed in an attractive format. However, the article must be selected and viewed from the Tree View on the KB Client site home page. End users cannot view articles by navigating to the Display Article Web Part page.

To configure the **KB Display Article Web Part**:

1. Access the Bamboo KB Display Article Web Part by selecting **All Site Content** from the KB Client site. Under **Document Libraries**, select **Site Pages > Display Page**. Edit the KB Display Article Web Part.
2. Configure the Web Part:
   - **Enter the site URL for the Bamboo KB Admin site:** Enter the relative path to the KB Admin site, then click the green arrow to populate the fields below.
   - **Select the KB Articles List:** Select the **Bamboo KB Articles List**.
   - **Select the KB Article View Count List:** Select the **Bamboo KB Article View Counts List**.
   - **Select the KB Configuration List:** Select the **Bamboo KB Configuration List**.
   - **Select the KB Rating and Comments List:** Select the **Bamboo KB Rating and Comments List**.
   - **Custom Related Article Information:** Create a tabbed section following the article content for custom article information such as **Review Date**, **Article Categories** or custom columns of your choice. Place your custom information on separate custom-named tabs.
     - **Section Name:** Enter in the name of the custom-related article information section.
     - **Tab 1 Title:** Enter in the name of the first tab.
     - **Tab 2 Title:** Enter in the name of the second tab.
     - **Tab 3 Title:** Enter in the name of the third tab.
     - **Available Columns:** Select the column data you want to display in a tab. Select a tab name in the **Display Columns** list box, then click the single right arrow button to move the available column under the tab in the **Display Columns** list box. Use the **Shift+Click** or **CTRL+Click** keys to select multiple columns in the **Available Columns** list box. Use the double right arrow button to move all available columns to the selected tab in the **Display Columns** list box.
     - **Display Columns:** Lists the selected columns and their respective tabs. Use the up and down arrow buttons to move the columns up or down within a tab. To add or remove a column from one tab to another, you must select the column, click the left arrow button to remove it from its current tab, then select the new tab, select the column in the **Available Columns** list box and click the right arrow button.
   - **Use SMTP secure authenticated connection:** Select this check box to enter in credentials for SMTP authentication.
     - **User ID:** Enter in the user ID.
     - **Password:** Enter in the password for the user ID.
     - **Port:** Enter in the port number.
   - **Records per Page:** Enter in the number of records to be displayed at a time in the **Related Articles**, **Article Attachments** and **Related External Links** boxes.
   - **Allow Article Rating:** Select this option to show the **Article Rating and Comments** box at the bottom of the article content so that users may submit their rating and comment on each article. If you select this box, you must select the rating system to use: **Numerical** or **Star**.
     - **Numerical Rating or Star Rating:** The **Allow Article Rating** option must be selected in order to select one of these options. Select the **Numerical Rating** option to display a number rating system at the bottom of an article. Select the **Star Rating** option to display a graphical 5-star-based rating system at the bottom of an article.
   - **Hide Article Keyword(s) in Article Title Bar:** Select this option to hide the article keyword(s) from the title bar of the article.
   - **Hide Print Option:** Select this option to prevent end users from printing articles.
   - **Select a Language:** Select this option to set the language used on the user interface of this Web Part. See Localizing SharePoint Knowledge Base Solution Accelerator for more information.
3. Click **Apply** and then **OK** to save your changes.

Configuring the KB Tag Cloud Web Part

The **Bamboo KB Tag Cloud Web Part** allows end users to locate articles that have been viewed the most times by selecting a commonly used keyword (i.e. tag) from the tag cloud.

To configure the **Bamboo KB Tag Cloud Web Part** :

1. From the KB Client site, click the **Tag Cloud** link. Edit the KB Tag Cloud Web Part.
2. Configure the Web Part:
    - **Enter the site URL for the Bamboo KB Admin site:** Enter the relative path to the KB Admin site and click the green arrow to populate the fields below.
    - **Select the KB Articles List:** Select the **Bamboo KB Articles List**.
    - **Select the KB Tag Cloud List:** Selected the **Bamboo KB Tag Cloud List**.
    - **Enter the URL to the page that contains the Bamboo Display Article Web Part for displaying article content:** This field is prepopulated with the relative path to the Bamboo KB Display Article Web Part.
    - **Tag Format:** Click ![A] to select a font type, style, color, background color, alignment, decoration, etc. in the dialog box.
    - **Number of Top Tags to Display:** Enter the number of tags you want to display in the tag cloud. In the example screenshot above, only 20 of the most viewed (i.e. top) tags will be displayed in the tag cloud.
    - **Show Drop-Down Filter Menu:** Select this check box to show a filter drop-down box that allows users to locate tags in the cloud by first letter of the tag name.
    - **Number of Related Articles to Display:** Enter the number of related articles you want displayed after selecting a tag in the cloud.
    - **Select a Language:** Select this option to set the language used on the user interface of this Web Part. See Localizing SharePoint Knowledge Base Solution Accelerator for more information.
3. Click **Apply** and then **OK** to save your changes.

TOP

<div style="background-color:#9ACA3C">Configuring the KB Search Web Parts</div>

To configure any of the KB Search Web Parts (Article Search, Category Search, etc.), edit the Web Part, then click the **KB Search Web Part Settings** button in the Web Part tool pane to display the Web Part Settings page.

Note: You must disable pop-up blockers for the site to display the Web Part Settings.
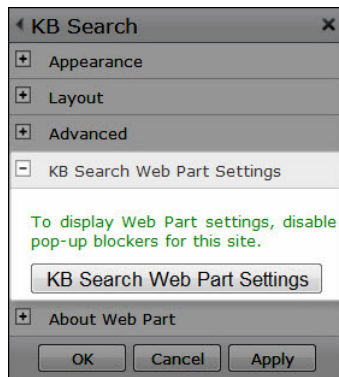
Click the links below for details about configuring the KB Search Web Part settings. When you are finished configuring the Web Part, click the **Save & Close** button in the Web Part Settings page, then click **Apply** and then **OK** in the Web Part tool pane.

- Search Criteria Configuration
- Search Results Configuration
- Look and Feel Settings
- Language Settings
- Online Resources and Customer Support

<div style="background-color:#9ACA3C">Search Criteria Configuration</div>

Each instance of the KB Search Web Part can search one SharePoint list or library. In the **Search Criteria Configuration** settings page, identify the list or library to search and define search criteria.
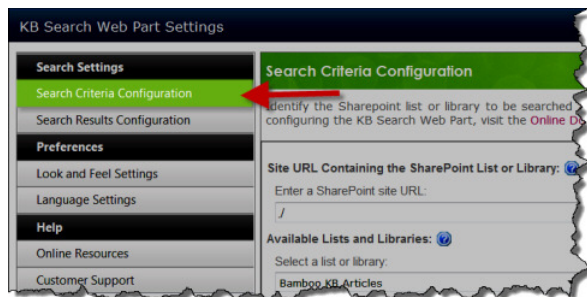
Select a List or Library to Search

1. Click **Search Criteria Configuration** in the Search Settings section of the KB Search Web Part Settings page.
2. In the **Enter a SharePoint site URL** box, type the path to the KB Admin or KB Client site that contains the list or library to search. For the KB Client Search

Web Part, the URL for the KB Admin site. The site can be part of any site collection in the Web application. Site URLs can be absolute (http://servername/site) or relative (./site). Bamboo recommends using a relative URL if the Web application has multiple access points using Alternative Access Mappings (AAM) or if the Web Part will be saved as part of a site template.

3. Click the **View Lists and Libraries** button to populate the Available Lists and Libraries drop-down list.

4. In the **Select a list or library** drop-down list, select the list or library to search in the KB Search Web Part. Make sure to select the correct list or library. For example, to configure and search the Article Search Web Part, select the Bamboo KB Articles List.

5. **KB Client Search Web Part only:** In the **Enter a URL to the page that contains the Bamboo Display Article Web Part** box, enter the relative path to the page that contains the Bamboo Display Article Web Part, for example ./SitePages/Display%20Page.aspx. This step is required in order to view KB articles.

Search Columns

Select the list or library columns you want to search. If you do not select any columns, the KB Search Web Part will only display a single field to search all columns.

- To make a column searchable, select it in the **Available Columns** list on the left and click the **>** button to add it to the **Selected Columns** list on the right. Hold down the SHIFT or CTRL key to select and move more than one column.
- To add all columns to the searchable columns list, click the **>>** button.
- To remove a column from the list of displayed columns, select the column or columns to remove and click the **<** button.
- To remove all columns, click the **<<** button.
- To reorder the displayed columns, select a column and click the up or down arrows.

Search Criteria Join Operators

If search terms are entered in more than one column, the **Search Criteria Join Operators** selection determines how a match is found.

- Select the **OR** operator to display items that match any search term.
- Select the **AND** operator to display items only if they match all search terms.

Maximum Age

The Article Search and KB Client Search Web Parts have the option to set the maximum age for the search criteria. If this option is selected, users can choose the maximum age of the item they are searching for. For example, users can choose to search for articles from the past 6 months, comments from the past 90 days, or categories from the past 3 days.

Search Column Options

The KB Search Web Part can leverage the SharePoint Search service to allow searching in all list or library columns using a single search field. If SharePoint Search is enabled and configured in your SharePoint farm, check the option **Allow users to search all columns** to add an additional field to the search criteria list called **Search in all columns for**. If this option is not checked, only the columns selected in the **Search Columns** configuration section will be displayed. To display only the **Search in all columns for** field, remove all other columns from the **Search Columns** list.

Note: In order for results to be found using the **Search in all columns for** field, the list configured in the KB Search Web Part must be included in the SharePoint Search configuration. To test this, try searching for list data in the SharePoint Search page. If you see results from the list in SharePoint Search, you will get results

in the KB Search Web Part.

When the **Allow users to search all columns** option is checked, the following additional features define search behavior:

- **Search scope title**: To improve search performance, enter the smallest SharePoint Search scope that includes the list data you want to search. **Note:** Search scopes are only configurable in SharePoint Server 2010.
- **Include document content**: Select this option to also search the text in list item attachments and document library items. **Note:** Only document types that are indexed for SharePoint Search can be searched with the KB Search Web Part. For more information about searching documents, consult the documentation for your SharePoint version.

Search Criteria Value Options

The following options define how default field values and choice settings are displayed:

- **Display default column value**: For any SharePoint **Single line of text** column in the list or library that has a default value configured, the KB Search Web Part will display the default value as the default search term when this option is checked. **Note:** This option currently applies to Single line of text columns only.
- **Disable lookup fields**: Select this option to display the search box for SharePoint lookup columns as a text box instead of a drop-down list of choices. Bamboo recommends disabling lookup fields if the lookup list has more than 200 items. Populating the drop-down list for large lookup columns can slow the performance of the KB Search Web Part.

TOP

Search Results Configuration

The **Search Results Configuration** settings define how search results are displayed in the KB Search Web Part.
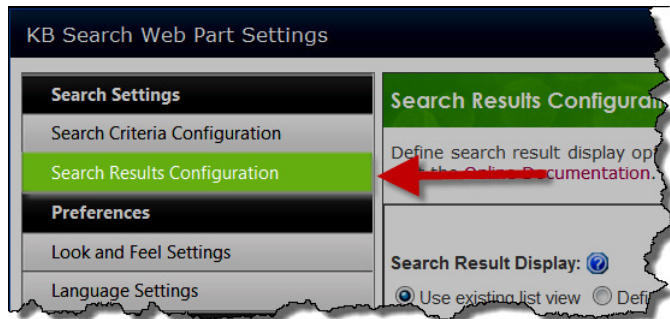
Search Result Display

Define the columns and view options for the search results grid:

- **Using existing list view**: When this option is checked, the columns displayed in the search results, number of items displayed, and the item sort order will match the settings configured for the list view selected in the **Available List Views** drop-down list. **Note**: Changing the list view configuration in the SharePoint list will affect the search results display in the KB Search Web Part. Make sure to select the correct list or library. For example, select the KB Admin Search Results List for the Article Search Web Part.

- **Define custom view options**: If you prefer to customize search results display options specifically for the KB Search Web Part, select this option. Then select the columns to be displayed, the number of items to display per page, and the item sort order. Changing list views for the SharePoint list will not affect how search results are displayed in the KB Search Web Part.

Search Result Options

The following additional options are available to customize the search results page:

- **Display both search criteria and search results**: When this option is checked, search results will be displayed below the search criteria. When the option is unchecked, the search criteria will be replaced by search results.
- **Allow printing of search results**: When this option is checked, the **Print** button is available on the search results screen.
- **Allow export of search results to Excel**: When this option is checked, the **Export to Excel** button is available on the search results screen.

Look and Feel Settings

Look and Feel Settings define the look and feel of the KB Search Web Part, including color scheme, font, and layout.
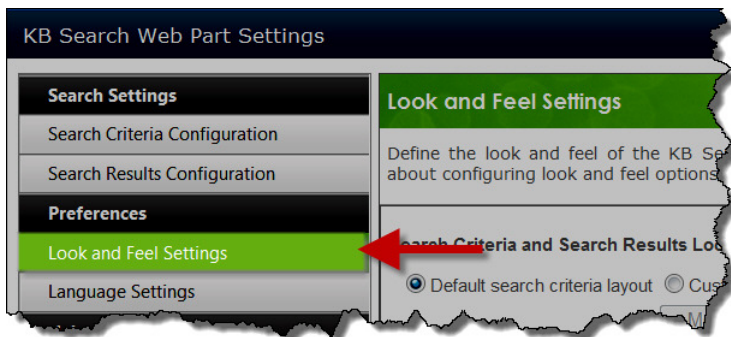
By default, search criteria are listed vertically in the Web Part in a grid view. To customize the layout of the search criteria page, select **Custom search criteria layout**, then click the **Modify Layout** button.

To modify the style applied to the search criteria page and the search results page, click the **Modify CSS** button.

Custom search criteria and search results style:

Modify CSS

Language Settings

To change the language used in the Web Part display and Web Part Settings page, perform the following steps:

1. If your preferred language is something other than English, customize or create a language file using the instructions provided in Localizing SharePoint Knowledge Base Solution Accelerator.
2. Access the KB Search Web Part and click **Language Settings** in the Preferences section.
3. In the **Select a Language** drop-down list, select the desired language file.
4. Click the **Save & Close** button to save the Web Part settings.
5. In the Web Part tool pane, click **Apply** and then **OK** to view updates in the Web Part instance.
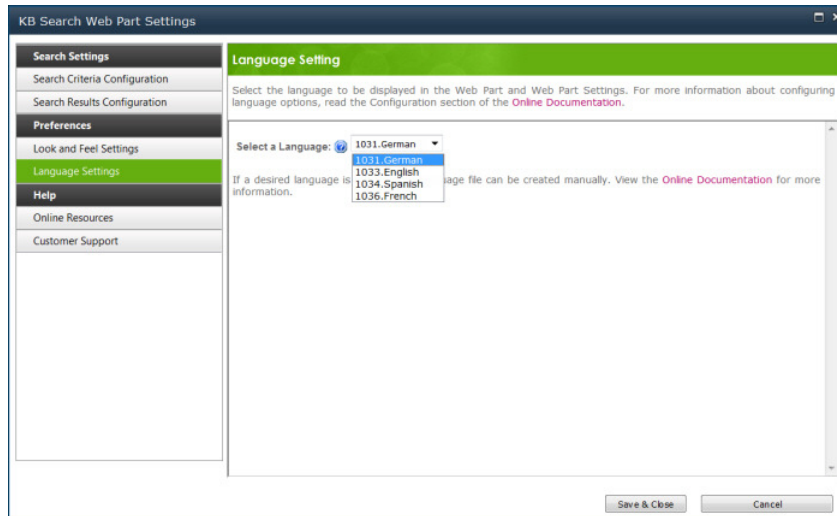
Online Resources and Customer Support

If you encounter difficulties or need assistance with the KB Search Web Part, read the information provided in the **Help** section of the KB Search Web Part Settings page.
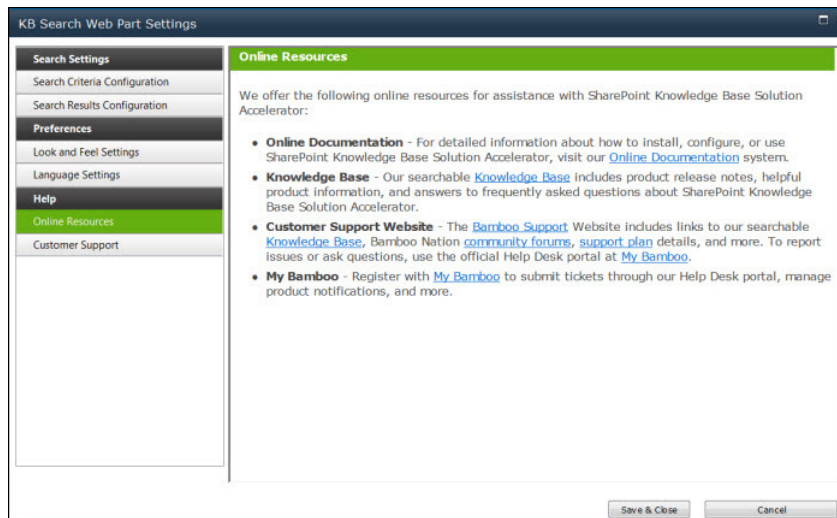
Using Relative Paths

Use the table below to determine how your relative paths will appear.

Site	Path	Is Equivalent To
Top Site (Root Site)	/SiteDirectory/KBAdmin/ or ~/SiteDirectory/KBAdmin/	http://servername/SiteDirectory/KBAdmin/_blank
Subsite (Current Web Site)	Lists/Discussion%20Board/ or ./Lists/Discussion%20Board/	http://servername/SiteDirectory/KBAdmin/Lists/Discussion%20Board/_blank

Localizing Bamboo Products

Bamboo products can display user interface and tool pane text in your local language. To change the language a product displays, perform the steps described below. Click a link below for detailed information about each step.

1. Customize a language file.
2. Select the customized language file in the product configuration.

Customizing Language Files

There are four language files included with Bamboo products:

- 1031.German.xml
- 1033.English.xml
- 1034.Spanish.xml
- 1036.French.xml

These files are located in the **wpresources** folder. This folder may be located under the following paths:

- *servername**drive*\Inetpub\wwwroot\wss\VirtualDirectories*port***wpresources**\[Product]
- *servername**drive*\Program Files\Common Files\Microsoft Shared\web server extensions**wpresources**\[Product]

The German, Spanish and French files have not yet been translated; they are still in English. Edit these files directly to provide your own translation of the product user interface and tool pane text. To make sure that these files are not overwritten when you upgrade the product, copy the default file for the language you want to the **wpresources** folder and rename it, for example: *CompanyName.1036.French.xml*. If you do not rename the files you modify, these files will be overwritten when the product is upgraded.

To create language files for languages other than German, English, Spanish, or French, copy one of the existing language files and rename it. Then edit the file to provide your own translation.

The installation program will not remove or overwrite translation files you have created if they are named differently from the default resource files included with the product. However, product upgrades may require that you modify custom translation files to include new resource strings that were added for the new product version. The product will display the missing resource string IDs after an upgrade is completed. Copy these resource string IDs from a default language file to your custom translation file and make the appropriate changes for your language.

Selecting a New Language File for a Product

The instructions below for changing language file settings apply to Bamboo products with settings configured in the Web Part tool pane or Web Part Settings pop-up page.

Changing Language Settings in the Web Part Tool Pane

1. Click the edit drop-down arrow on the Web Part title bar and select **Modify Shared Web Part**.
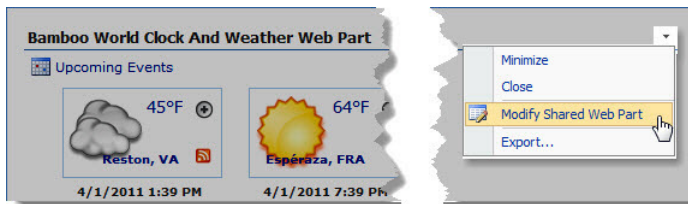
2. In the **Language** settings section of the Web Part tool pane, select the language file you want to use.
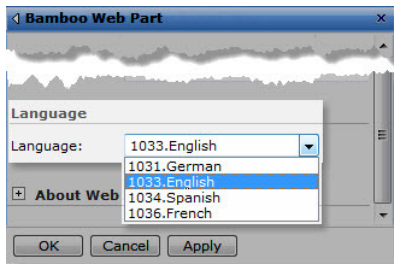
3. Click **Apply** and then **OK** in the Web Part tool pane to apply your changes.

Changing Language Settings in the Web Part Settings Pop-up Page

1. From the Web Part, click the edit drop-down arrow on the Web Part title bar and select **Modify Shared Web Part**.
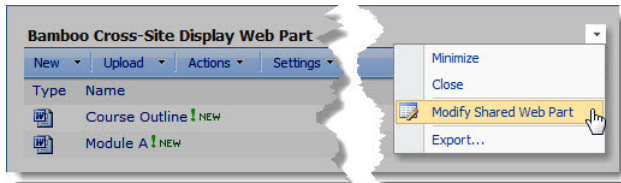
2. Click the **[Product] Settings** button in the Web Part tool pane.
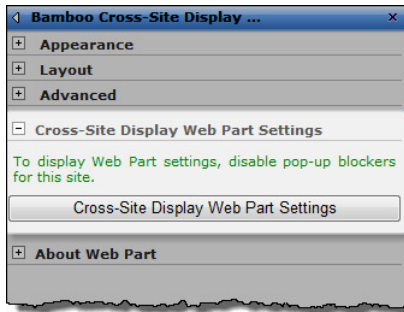
3. Click **Language Settings** in the Web Part Settings page and select the language file you want to use.
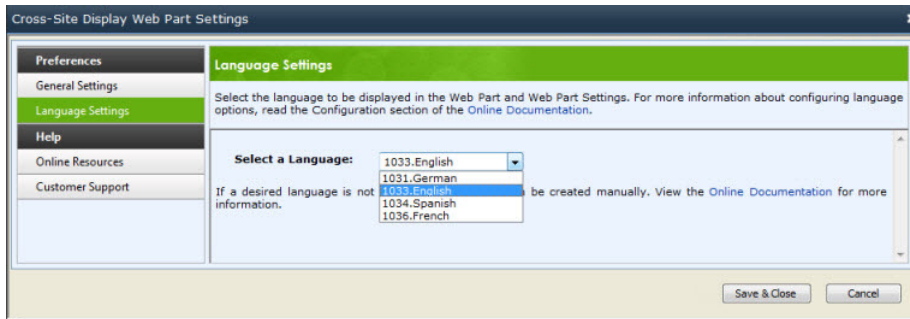
4. Click the **Save & Close** button to save the Web Part settings.
5. Click **Apply** and then **OK** in the Web Part tool pane to apply your changes.

Using SharePoint Knowledge Base Solution Accelerator

- Using the KB Admin Site
- Using the KB Client Site
- Using the KB Search Web Parts

Using the KB Admin Site

The KB Admin site allows Knowledge Base administrators to view data about articles and authors, create new articles, manage existing articles, approve and manage article comments, answer end-user questions, manage images, and create and manage Knowledge Base article categories.

The KB Admin site must be configured before it can be used. Read Configuring the KB Admin Site for information on configuring the KB Admin site.

Access the lists, libraries, discussion boards and other site content used in the KB Admin site by selecting **Site Actions > View All Site Content** and selecting the desired item.

Click the links below for more information on each section.

- Reporting: View data and statistics about Knowledge Base articles.
- Authors: View data about Knowledge Base articles according to author.
- Pictures: Upload article- or category-related images.
- Pending Questions: Answer questions submitted by end users.
- Article Control: Create and edit articles. Manage article and category permissions.
- Category Control: Create and edit article categories.
- Comment Control: Approve and manage comments on articles.
- Tag Cloud: Create tags to be associated with articles.

Reporting

The KB Admin site's Reporting feature allows Knowledge Base administrator to view data about Knowledge Base articles via charts, including:

- **Article Counts by Categories**: Displays the current categories in the Knowledge Base along with how many articles are in each category
- **Article Counts by Article Type**: Displays the article types along with how many articles are in each type
- **Article Usage Report**: Allows Knowledge Base administrators to see which articles have the most views
- **Ask a Question Report**: Displays how many questions have been asked, whether they were answered, and if Knowledge Base articles need to be created based on the questions and answers

A data view is displayed underneath Article Counts by Categories and Article Counts by Article Type. This data view displays the number of articles in each category or article type along with the average user rating for that category or article type. The Article Usage Report is a data view of the most popular articles and each article's page views and rating. The Ask a Question Report is a bar graph that displays the number of questions submitted by users that:

- Need a Knowledge Base article to be written
- Do not have an answer
- Have replies

To select colors for the chart, edit the Web Part. In the tool pane under **Bamboo KB Reporting Configuration**, click **Choose colors for the chart**. A new window opens where you can select the desired colors for the chart. Choose your colors manually or click **Auto Select** to automatically assign colors, then click **Save**. To change the chart skin (the background color), choose the desired skin from the drop-down list under **Select a skin for the chart**. To increase or decrease the size of the chart, select the desired size under **Choose a chart size**.

Select **Turn off chart labels** to turn off the labels displayed in the chart. Select **Show the Print and Export to Excel action buttons** to display these options in the Action button, located under the Web Part title. Click **Apply** and then **OK** to save your changes.

If the chart reduces in size after you select a different chart skin, choose **Row** instead of **Column** in the tool pane under **Choose a legend display style**.

TOP

Authors

The Authors section displays a data view of All Articles, which displays all articles in the Knowledge Base, or My Articles, which displays the articles authored by the logged-in user. You can sort, filter, and make changes in datasheet view by selecting the **Edit in datasheet** option in the tool pane. For more information, see the Data-Viewer online documentation.

TOP

Pictures

Use the **KB Picture Library** link under **Pictures** to upload and manage images for articles or categories. The KB Picture Library is a standard SharePoint picture library.

To upload a new image:

1. From the KB Admin site, click **KB Picture Library**.
2. Click **Upload** and choose whether you want to upload one or multiple images. Select the file to be uploaded.
3. Use the form to update the image properties, if necessary. Click **Save**.
4. The image is now in the KB Picture Library.

To manage images:

1. From the KB Admin site Home page, click **KB Picture Library**.
2. Use the toolbar to manage the picture library:
   - **New:** Adds a new folder to the picture library to help you organize your images.
   - **Upload:** Uploads one or multiple images to the picture library.
   - **Actions:** Use this button to perform the following actions: edit images in an image editor, delete images, download images to your computer, insert images in an e-mail or document, view images in a slide show, open the files with Windows Explorer, connect to Outlook, view RSS feeds or set up alerts on this page.
   - **Settings:** Creates a new column or view; manages picture library settings.

TOP

Pending Questions

Pending Questions displays the **Bamboo Article Questions and Answers List**, which contains questions that end users have submitted to Knowledge Base Administrators. **Answer Questions** is a data view of the questions that end users have submitted. It shows the number of replies for each question, the answer status for the question, whether or not the question needs to be turned into a KB, and a list of available actions, such as Answer Question, Mark as Answered and Edit.

These options allow Knowledge Base Administrators to better manage questions and answers to ensure that the Knowledge Base continues to be useful and beneficial to end users. For example, a question that is submitted by many end users can be marked as Need KB since it is a popular question.

To edit or modify the Bamboo Article Questions and Answers list, edit the list settings. To do this, navigate to the list by selecting **Site Actions > View All Site Content > Discussion Boards > Bamboo Article Questions and Answers**. Use the ribbon to edit the list settings by selecting **List > List Settings**. The list is blank until an end user submits a question.

To answer a question:

1. From the KB Admin site, click **Answer Questions**.

2. Select **Answer Question** from the Available Actions drop-down list for the question that you want to answer.
3. In the **Answer Question** section underneath the data view, type your answer in the **Answer** field. Use the formatting options at the top to format text, images and more. Use the Design option underneath the Answer field to edit in rich text format. Use the HTML option to edit in source code. Click Preview to view how the answer will appear when it is submitted.
4. Click **Send Answer to User** to e-mail the answer directly to the end user. Click **Answer Question** to display the answer on the page with the question. Click **Close** to cancel the reply.

To view replies:

1. From the KB Admin site, click **Answer Questions**.
2. The number of replies for each question are listed in the data view under **Number of Replies**.
3. To view the replies, select **View Replies** from the Available Actions drop-down list for the desired question.
4. A new window displays the replies in a discussion board.

To edit a question:

1. Select **Edit** from the Available Actions drop-down menu.
2. A new window displays the question in edit form.
3. Make the desired changes, then click Save.

To mark a question as answered:

1. Reply to the desired question.
2. Select **Mark as Answered** from the Available Actions drop-down list for the desired question.
3. The Answer Status automatically changes to Yes.

To mark a question as needing a KB:

1. Select **Mark as Need KB** from the Available Actions drop-down list for the desired question.
2. The status for **Need KB** automatically changes to Yes.

Article Control

Use the links under **Article Control** to create new articles, manage and edit existing articles, and manage article and category permissions.

The **Create New Article** link uses the **Bamboo KB Articles List**. To edit the columns used in the list, or to modify the options available in the list such as for **Article Type**, edit the list settings. To do this, navigate to the list by selecting **All Site Content > Lists > Bamboo KB Articles**. Use the ribbon to edit the list settings by selecting **List > List Settings**.

To create a new article:

1. From the KB Admin site, click **Create New Article**.
2. Create the new article:
    - **Article Title:** Enter a name for the article. This is a required field.
    - **Related Articles:** Add other articles that are related to this new article, if applicable. Click the related articles, then click **Add**. Click **Remove** to delete a related article.
    - **Article Keywords:** Enter keywords that you want to be associated with the article, such as "SharePoint 2010," "installation" or "troubleshooting".
    - **Article Type:** Select the type of article. This list is prepopulated with the following options:
        - BUG
        - ERRDOC
        - ERRMSG
        - FAQ
        - FIX
        - HOTFIX
        - HOWTO
        - INFO
        - PROBLEM
        - RELNOTE
    - **Related External Links:** Enter any related links to this article, if necessary, for example: links to Microsoft TechNet.
    - **Article Status:** Choose the article's status, such as Draft, Under Review, Publish or Archived.
    - **Review Date:** Enter a date, or click on the calendar icon, to select a review date.
    - **Article Category:** Choose one or multiple categories for the article. Click **Add** to add the categories; click **Remove** to delete them. Use the CTRL key to select multiple categories.
    - **Article Text:** Enter the text for the body of the article. Use the formatting options at the top to format text, images and more. Use the Design option underneath to edit in rich text format. Use the HTML option to edit in source code. Click Preview to view how the article will appear when it is submitted.

    - **Tag Term:** Choose tags to be applied to the article. These tags will allow the article to be searched via the Tag Cloud on the KB Client site.
    - **Expiration Date:** Enter a date, or click the calendar icon, when the article will expire. This ensures that the Knowledge Base remains up to date and current.
3. Click **Save**.

<u>To edit articles:</u>

1. Click **Article Control** to locate the desired article, or click **Manage Articles** and use the search options to enter in your search criteria.
2. Click the Edit icon in the Update column to edit the article. A new window opens with the article in edit form.
3. Make your changes and click Save. Click **Cancel** to cancel the changes.

<u>To manage article and category permissions:</u>

The SharePoint Security Trimming Web Part allows Knowledge Base Administrators to set permissions for articles or categories in batches. This enables Administrators to better manage and control articles and categories. For example, Administrators can set permissions for the category "Sales" so that only the Sales Department can view articles in the "Sales" category. Or, Administrators can set permissions for article type "RELNOTE" so that only the Engineering and Product Management departments can view articles under the category "Release Notes".

To manage article permissions:

1. From the KB Admin site's Quick Launch, click **Manage Articles and Category Permissions**.
2. Under **Manage KB Articles Permission**, enter the search criteria for the articles you want to manage permissions for, then click **Search**.
3. In the search results grid view, the color under the **Security Type** indicates the security level belonging to each article. Articles with the same color have the same security level.
4. Select the desired articles and click **Manage Permissions**.
5. Select the user/group and choose one of the following:
     - Inherit Permissions
     - Grant Permissions
     - Edit User Permissions
     - Remove User Permissions

To manage category permissions:

1. From the KB Admin site's Quick Launch, click **Manage Articles and Category Permissions**.
2. Under **Manage KB Category Permission**, enter the search criteria for the category you want to manage permissions for, then click **Search**.
3. In the search results grid view, the color under the **Security Type** indicates the security level belonging to each category. Categories with the same color have the same security level.
4. Select the desired articles and click **Manage Categories**.
5. Select the user/group and choose one of the following:
     - Inherit Permissions
     - Grant Permissions
     - Edit User Permissions
     - Remove User Permissions

<u>To change the width of the **Related Articles** and **Article Category** fields:</u>

The width of the Related Articles and Article Category fields can be modified using SharePoint Designer so that full article titles and categories are visible. The screenshots below show SharePoint Designer 2010 and SharePoint Knowledge Base Solution Accelerator 2010, but the steps are the same.

To modify the width:

1. Open the KB Admin site using SharePoint Designer.
2. Under Bamboo KB Articles and Bamboo KB Categories, open **EditForm.aspx** and **NewForm.aspx**.
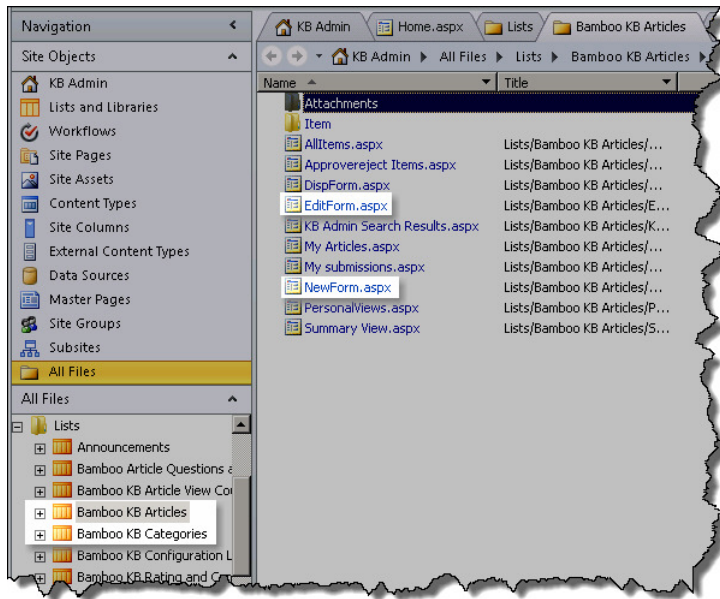
3. From the ribbon, select **Web Part Zone**. (If this option is grayed out, use the ribbon to select **Home > Advanced Mode**.) Under **Web Part**, select **Content Editor**.
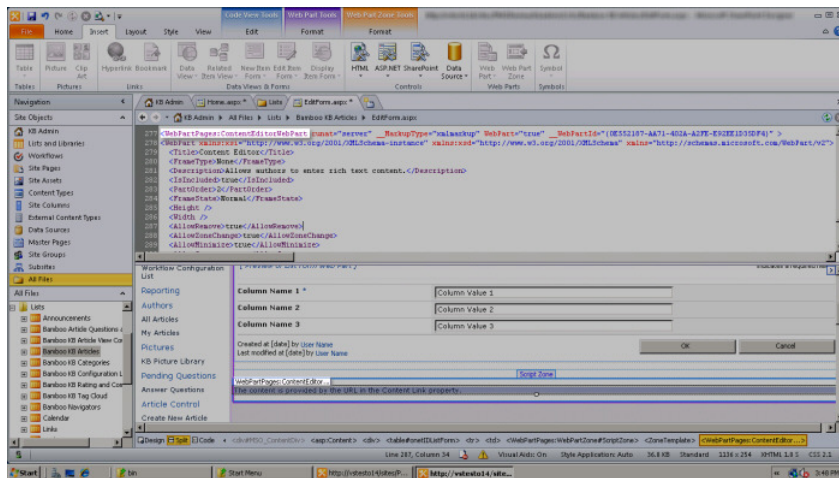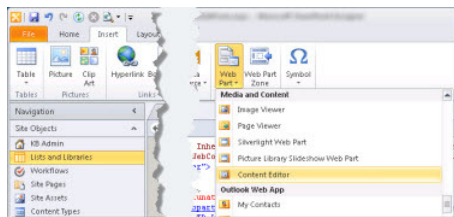
4. Right-click on the Web Part and select **Web Part Properties**. Under **Content Link**, click [...] and browse to **Shared Documents > Bamboo_KB_Articles.js**. Click **OK** and save the page.
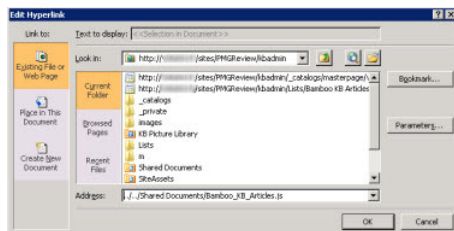
5. Return to the KB Admin site and create a new article. Select **Site Actions > Edit Page** to edit the page.
6. Edit the hidden Content Editor Web Part.
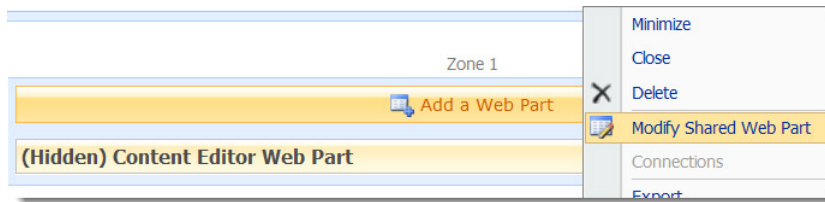
7. In the tool pane, click **Source Editor**. Copy the contents of the .js file into the Source Editor dialog box. Change the value of **var maxLimitWidth** to the desired field width. The default value is 250.
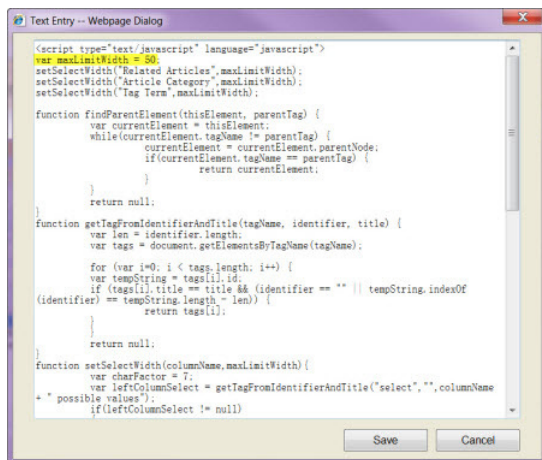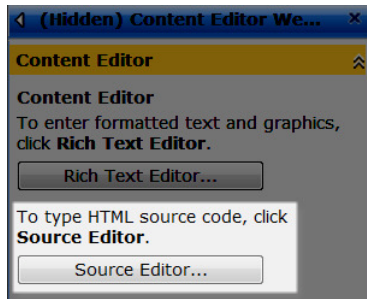
8. Click **Save**, then click **Apply** and then **OK**.
9. The field is now widened.

Category Control

Use the **Add New Category** and **Manage Categories** links under **Category Control** to add new categories and manage or edit existing categories.

The **Add New Category** link uses the **Bamboo KB Categories List**. The list is prepopulated with data that you can modify. To edit the columns used in the list, edit the list settings. To do this, navigate to the list by selecting **Site Actions > View All Site Content > Lists > Bamboo KB Categories**. Use the ribbon to edit the list settings by selecting **List > List Settings**.

To add a new category:

1. From the KB Admin site, click **Add New Category**.
2. In the New Item form, enter the name of the new category (required); a parent category (such as Announcements & News or Articles, Tips & Tricks) to be associated with the category, if desired; and an image URL, if necessary.
3. Click **Save**.
4. The new category is added to the Bamboo KB Categories list. It is displayed in the KB Tree View on the KB Admin site home. View the new category by clicking **Category Control**.

To manage categories:

1. From the KB Admin site, click **Manage Categories**.
2. Enter your search criteria and click **Search**.
3. Click the Edit icon under the Update column to edit a category. A new window displays the category in edit form.
4. Make your changes and click **Save**.

Comment Control

Use the **Approve & Manage** link under **Comment Control** to approve and manage comments submitted by end users about Knowledge Base articles.

The **Approve & Manage** link uses the **Bamboo KB Rating and Comments List**. To edit the columns used in the list, edit the list settings. To do this, navigate to the list by selecting **Site Actions > View All Site Content > Lists > Bamboo KB Ratings and Comments**. Use the ribbon to edit the list settings by selecting **List > List Settings**.

Warning: If you are using workflows to approve and manage comments, do not manually approve comments. Doing so will stop the workflow task from approving comments, and the Workflow Task List will display open tasks. Choose to approve comments using <u>only</u> one method (workflows or manual approval).

To manage comments:

1. From the KB Admin site, click **Approve & Manage**.
2. Enter your search criteria and click **Search**.
3. To publish the comment, click **Publish**. To edit the comment, click the Edit icon under the Update column. A new window displays the comment in edit form.
   - Use **Article ID** to assign a different ID to the comment. This is a required field.
   - Change the **Rating** using the drop-down list.
   - Modify the **Comments** in the rich text editor. Use the formatting toolbar to format your text.
   - Change the **Status** of the comment to **Submitted**, **Rejected** or **Published**.
   - Associate the comment to another **Article Title** using the drop-down list.
4. Make your changes and click **Save**.

TOP

Tag Cloud

The Bamboo KB Tag Cloud List allows Administrators to add new tags to be associated with articles. End users on the KB Client site can then view a tag cloud to view articles associated with that tag.

To add tags to the Bamboo KB Tag Cloud List:

1. From the KB Admin site, click **All Site Content**.
2. Under **Lists**, select **Bamboo KB Tag Cloud**.
3. Click **Add new item** to add a new tag to the list. Click **Save**.

TOP

Using the KB Client Site

The KB Client site enables end users to search for articles and content; print or e-mail articles or export them to PDF; submit questions to Knowledge Base Administrators; rate and comment on articles; view the most popular and recently added articles; and more. You must configure the KB Client site before you can begin using it. Read Configuring the KB Client Site for information on configuring the KB Client site.

Before you can use the KB Client site, you must create articles in the **KB Admin site**. Read Using the KB Admin Site for information on using the KB Admin site.

Click the links below for more information on each section.

- Home (to locate articles and to view the most popular and most recently added articles)
- Search (to search for articles using specific search criteria)
- Ask a Question (to submit questions to Knowledge Base Administrators)
- Tag Cloud (to view specific articles using tag terms)

Home

The **Home** page displays a tree view of articles that allow users to search for articles.

The sections for **Most Popular Articles**, **Latest Additions** and **All Articles** can be hidden. The tree view can also be hidden. To hide one or all of these options, edit the Web Part. In the configuration tool pane, uncheck the options that you want to hide. Click **Apply** and then **OK** to save your changes.

To view any of the articles in the **Most Popular Articles**, **Latest Additions** and **All Articles** sections, simply click the article title to view it.

The article's title and content are displayed. Keywords associated with the article are displayed above the article title. On the right side of the page, view when the article was created and last modified as well as who last modified the article. See how many times the article has been viewed and what the article rating is. You can also print or e-mail the article. Underneath the article, you can rate the article and submit comments. You can also view related external links associated with the article. Under **Additional Article Details**, you can view the article type, tag terms associated with the article, the date that the article was last reviewed, and the categories associated with the article.

Use the tree view to view articles by expanding or collapsing the categories to view subcategories. The **Most Popular Articles**, **Latest Additions** and **All Articles** sections then display that category's most popular articles, most recently added articles and all articles.

TOP

Search

The **Search** page allows end users to search for articles using specific search criteria. See Using the KB Search Web Parts for more information about searching and search criteria.

To search for an article:

1. From the KB Client site Home page, click **Search**.

2. Enter in your search criteria and click **Search**.
3. Click the article title to view the article. Click **Print** to print the article or **Export to Excel** to export it.

Ask a Question

The **Ask a Question** page allows end users to submit questions to Knowledge Base Administrators, who can then review the questions and respond to them. Read Using the KB Admin Site for more information on answering questions.

You can modify the instructive text that appear on this page according to your organization's needs. For more information, read Configuring the KB Client Site.

To submit a question:

1. From the KB Client site, click **Ask a Question**
2. Fill out the form with your name, e-mail address, subject and question.
3. Click **Submit Question**.

The question is submitted to the Knowledge Base Administrators through the **Pending Questions** section in the KB Admin site. The Knowledge Base Administrator can e-mail the reply to the question directly to the user from this section. For more information, read Using the KB Admin Site.

Tag Cloud

The **Tag Cloud** page allows users to search for articles using tag terms. Users can select the most viewed articles by selecting the largest tag term in the tag cloud. Tags must be created in the KB Admin site. See Using the KB Admin Site for more information.

Use the drop-down list to search for specific tags. Click a tag to view all articles associated with that tag.

A larger tag size indicates a greater number of articles associated with that tag.

Using the KB Search Web Parts

The following topics provide examples of using KB Search Web Parts with different search options:

- Simple Searching
- Viewing Search Results
- Printing and Exporting Search Results
- Searching Multiple Columns
- Searching Using AND, OR or MINUS
- Searching in All Columns

Simple Searching

To perform a search with the KB Search Web Part, simply enter search terms in one or more search criteria fields and click the **Search** button. The example below shows a search for published articles created in the last 3 days that contain the keywords "My Bamboo," "licensing" and "activation keys."

Viewing Search Results

Search results are displayed in a grid view according to how the KB Search Web Part is configured. Search results will either be displayed below the list of search criteria or will replace the search criteria, depending on the option configured in the Web Part settings. The columns shown in the search results may correspond to an existing list view or may have been customized when the Web Part was configured. The columns displayed be different from the columns that can be searched.

If there are more search results than can be displayed on one page, use the paging links at the bottom of the search results grid to move between pages of results. The maximum number of items per page is configured in the list view if results are displayed using an existing view or in the Web Part settings if custom view options are configured.

Click any column heading to sort the results by that column. Click again on the same heading to reverse the sort order. Default sort order is configured in the list view if results are displayed using an existing view or in the Web Part settings if custom view options are configured. **Note:** This feature is not available for

SharePoint Search results view.
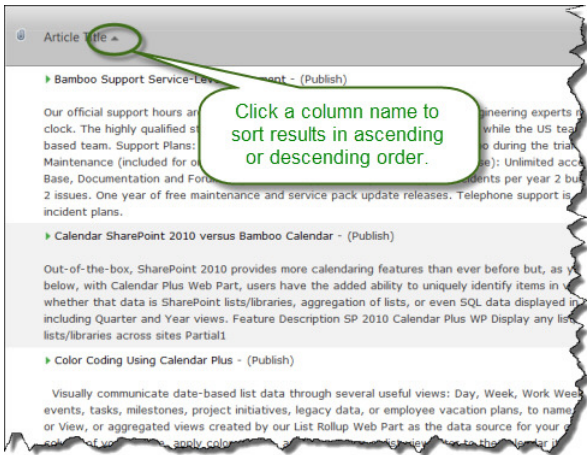
To view the details for an article, click the article title. A new window displays the article in view form. To view the details for a category or comment, click the item link. The item will be displayed in a new page. **Note:** The search results view must include a column with the **linked to item** option.
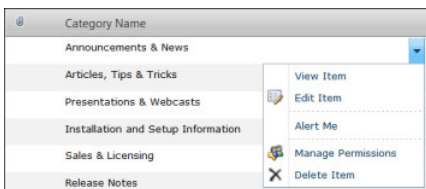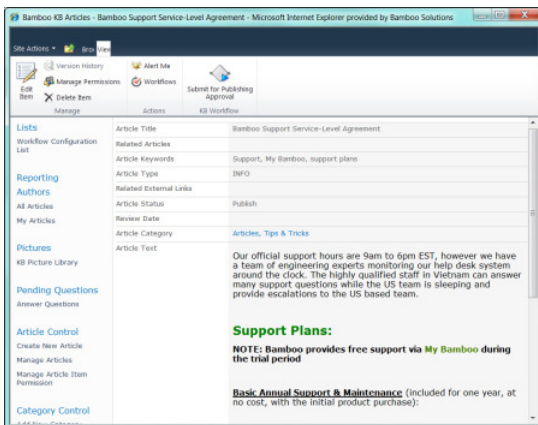
Note: You can perform additional item actions (edit, delete, etc.) using the item edit menu. The search page will be reset when you perform item actions using the edit menu.

TOP

Printing and Exporting Search Results

If the options to allow search result printing and exporting are enabled in the Web Part settings, the **Print** and **Export to Excel** buttons are available in the search results page.

Click the **Print** button to format search results for printing and send them to your printer.

Click the **Export to Excel** button to export search results to a Microsoft Excel spreadsheet.

TOP

Searching Multiple Columns

You can search in more than one field at a time by entering values in multiple search criteria fields. Depending on which option was selected when the Web Part was configured, search terms will be joined with either the OR or AND operator. With the OR operator, items will be displayed in the search results if they match *any* of the search terms. With the AND operator, items will be displayed in the search results only if they match *all* search terms. Contact your SharePoint administrator if you are not sure which option is configured for the Web Part.

Searching Using AND, OR or MINUS

Users can search for multiple criteria in the same field using AND, " " or +. In the examples below, the terms "Troubleshoot" and "Farm" are used to search for articles. The results are the same regardless of how the search terms are entered.

Use + to search for both terms.

Users can search for multiple criteria in the same field using OR or a space. In the examples below, the terms "PowerShell" and "SharePoint 2010" are used to search for articles. The results are the same regardless of how the search terms are entered.

Use OR to search for either term.

Use a space to search for either term.
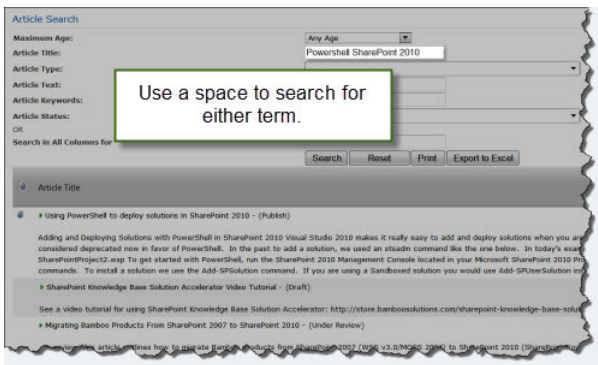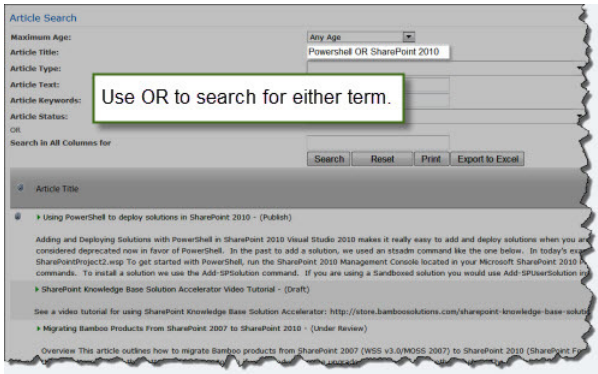
Users can omit specific criteria when searching by using the minus sign (-). In the examples below, articles that include "Bamboo" but do not include "2010" are displayed by entering **Bamboo -2010** for the search string.

Use the minus sign (-) to omit specific criteria from the search.

None of the articles contain "2010", but they do contain "Bamboo".

TOP
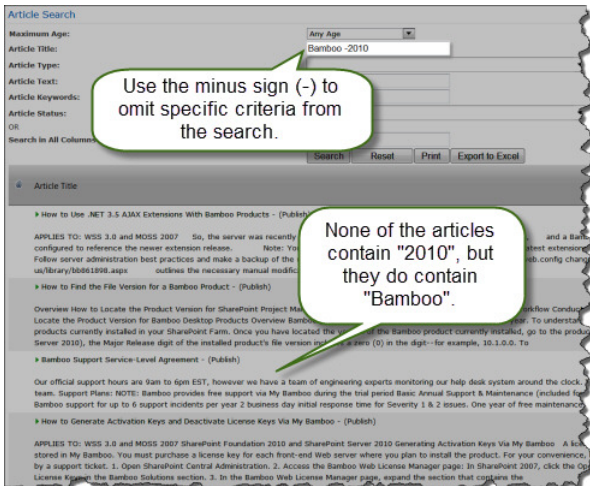
If the **Allow users to search all columns** option is selected in the [Web Part settings](), a field called **Search in all columns for** will be displayed in the KB Search Web Part. Enter one or more search terms in this field to search text in all columns of the SharePoint list or library. This search fields leverages the SharePoint Search service and requires that SharePoint Search be enabled and configured. For an item to be found using the **Search in all columns for** field in the List Search Simple Web Part, you must also be able to find it in SharePoint Search.

Note: Entering search terms in the **Search in all columns for** field overrides any search terms entered in other search criteria fields. The **Search Criteria Join Operator** setting does not apply to this field.

The following additional Web Part settings affect how the **Search in all columns for** field and its results are displayed:

- **Include document content:** When this option is selected, item attachments and document library items that are indexed in SharePoint Search will also be searched.
- **Use SharePoint Search results view:** When this option is selected, search results are displayed using the same columns displayed in SharePoint Search results. This option overrides any list view or custom view display options that are configured in the Web Part.

[TOP]()

For trials, no license key is required. For more information on our licensing, refer to http://store.bamboosolutions.com/BambooMainWeb/FAQ.aspx.

Once purchased, the product licensing is controlled through a separate license key and activation program **installed on the server where SharePoint Central Administration is installed**. To license Bamboo products, you must:

1. Install the Bamboo Web License Manager on the SharePoint server where SharePoint Central Administration is installed (just install one time - not for each product that you install).
2. From Bamboo Web License Manager, locate the product you want to activate, enter in your license key(s) and activate the product on the servers you want the product to run - all from one place. You can activate the license online or via email.

You can also check the licensing status of Bamboo products you installed to determine whether a product trial will soon expire or whether the product has been deactivated or not.

You must be a machine and SharePoint Farm administrator to install and run the Bamboo Web License Manager.

1. On the server where SharePoint Central Administration is installed, then from the Setup program screen, click the **Bamboo Web License Manager** component button, then click **Install**.
2. Click **Next** to continue.
3. The program performs some system checks to determine whether your server is ready for installation. Click **Next** to continue.
4. The program is restricted to only install the Bamboo Web License Manager on the server where it detects the SharePoint Central Administration has been installed. This Web application should be already selected for you as well as the Automatically activate this feature check box. Click **Next** to continue.
5. The Bamboo Web License Manager is then installed on the server. Click **Next** to view a details screen of the installation.
6. Click **Close**.

For troubleshooting and additional information, see the [Knowledge Base]() or log into [My Bamboo]().

Licensing and Activating the Web Part

1. Open SharePoint Central Administration (make sure you have the proper access rights to log in), click **Operations** under the Central Administration section of the left navigation bar.
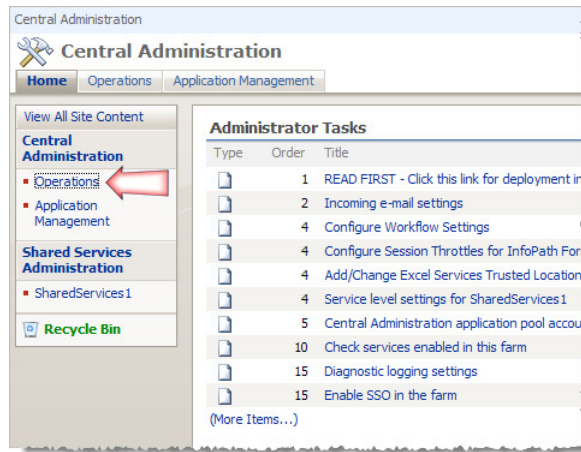

2. Under the **Bamboo Solutions Corporation** section, click **Bamboo Web License Manager**. Note: If you have not yet installed any Bamboo products, the Web License Manager does not show any products.
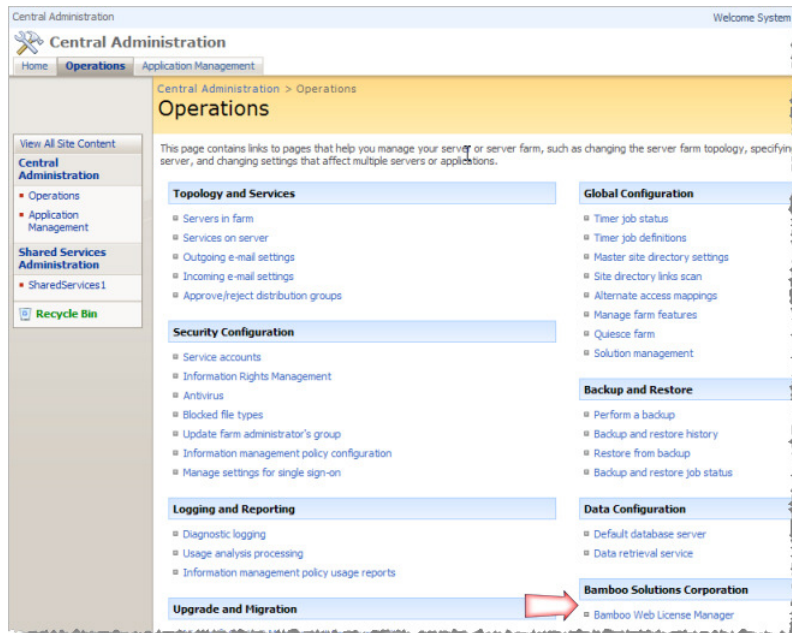
3. Expand the **Individual Products** or **Suites** section (depending on the product you want to license), locate your product, and click the product name to view the license status or click the drop-down arrow to **Activate/Deactivate** or view the **Status**.

4. Do one of the following:
   - If you want to activate the product without viewing the status, click **Activate/Deactivate** from the drop-down (see screenshot above).
   - If you are viewing the licensing Status, then click the status to activate or deactivate the license.
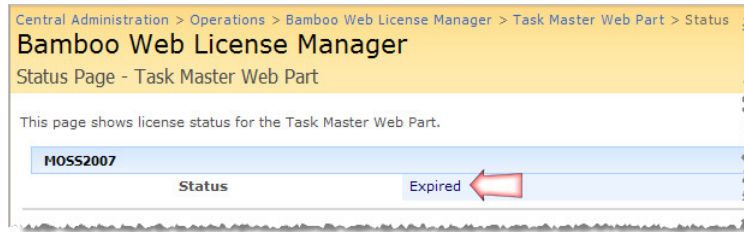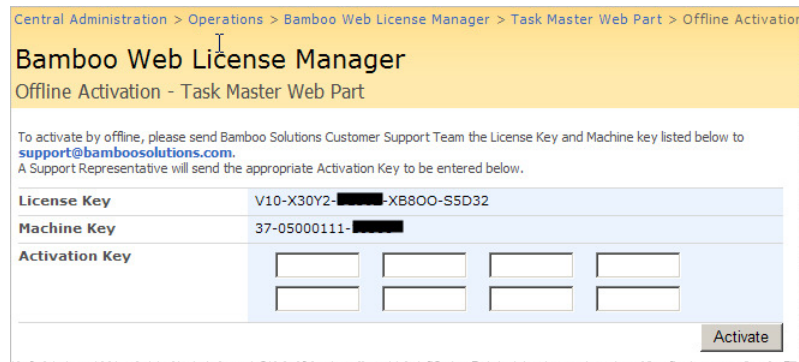
5. Do one of the following:
   - To activate online, type or copy and paste the license key into the field provided and click **Activate**.
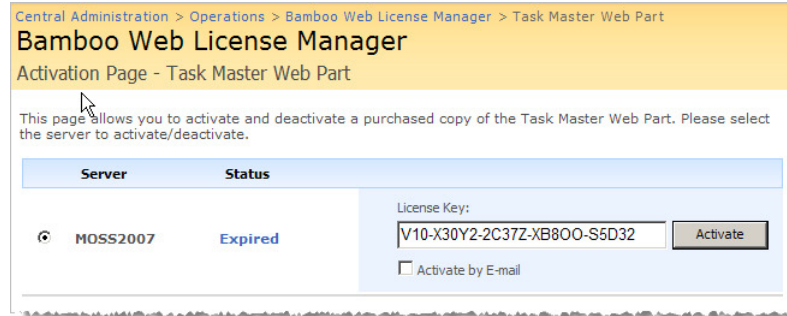
   - To activate by email, enter the license key and select the **Activate by E-mail check** box, then click **Activate**.

6. If you choose to activate by email, click the support@bamboosolutions.com email address and send the License Key and Machine Key to Bamboo Support. Our Support Team will reply with an activation key that you will then type into the boxes provided. Then click **Activate**.

7. Your product has now been activated and is ready for use.
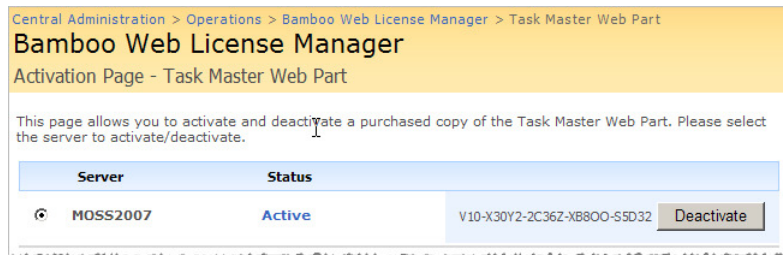
8. **Optional Step:** Click the **Choose License Server(s)** link. This page allows you to select all the web front end servers you may want to install Bamboo products on. However, this is optional. Please read the license servers page to determine your selections. Click **OK**, after you have made your selections.