

SharePoint Knowledge Base Solution Accelerator for SharePoint 2007

Release 1.5 (SA05)

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System Requirements

Operating System	Microsoft Windows Server 2003 and 2008
Server	SharePoint Release 3: - 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

Installation

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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.

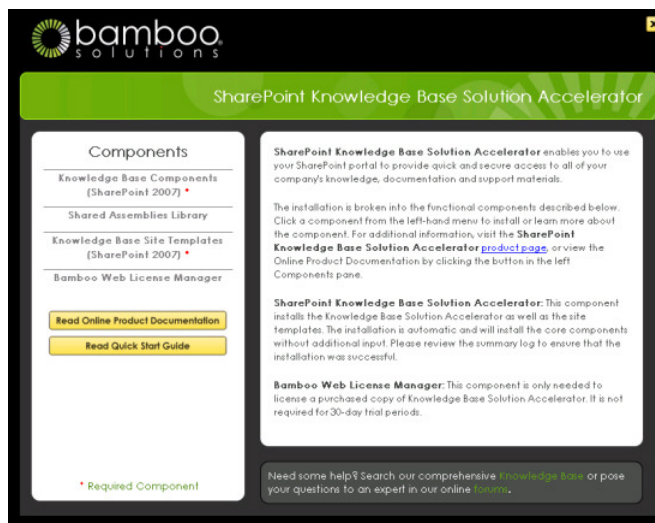
SharePoint Knowledge Base Solution Accelerator Setup Program

Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

The SharePoint Knowledge Base Solution Accelerator Setup program provides links to the various installation components for the SharePoint Knowledge Base Solution Accelerator. These components include the Bamboo License Manager as well as the Application Notes.

To access the SharePoint Knowledge Base Solution Accelerator Setup program:

1. Unzip the contents of your product download. Be sure that all files and subfolders are selected to be extracted.
2. The folder hierarchy contains a file at the root of the extraction folder named **Setup.bat**. It also contains the following folders:
 - **\SA05.KBAccelerator.wsp** - Contains the files needed for solution deployment. The file is located under the **\cab** subfolder. (See [Manually Installing or Uninstalling the SharePoint Knowledge Base Solution Accelerator Components](#) for more information.)
 - **\Bamboo.Core.wsp**: Contains the solution deployment file for manual installation of the Bambo Core. The file is located under the **\cab** subfolder.
 - **\Bamboo.Web.Licensing.wsp**: Contains the solution deployment file for manual installation of the Bambo Web License Manager. The file is located under the **\cab** subfolder. The Bamboo Web License Manager is not required for 30-day product trials.
 - **\misc** - Contains the site template files for the KB Admin and KB Client sites. You can manually upload these template files to your Site Template Gallery or you can install these templates from the Setup screen. **Note:** If you install these templates from the Setup screen, the templates will not show in the Site Template Gallery even though you can still create sites based on them. These templates are installed using STSADM and, if needed, must be removed using STSADM. If you upload these templates manually, then you can manage them from the Site Template Gallery just as you would any other site template.
 - **\msi** - Contains the product installation executables.
 - **\res** - Contains resource files for the Setup program.
 - **\docs** - Contains an HTML-based Quick Start Guide.
3. Find the **Setup.bat** file located at the root of the extraction folder. Double-click this file to launch the setup page.
4. The Setup page contains links to the product components under the **Components** header. Click on any of these links to view a description of the component in the right text area of the page. Click the **Install** button to install the component.



Shared Assemblies Library

The **Shared Assemblies Library** component is not a required part of the installation package, but it is **strongly recommended** if you have a multiple Web front-end environment and more than one Bamboo product installed. Installing the Shared Assemblies Library helps ensure that your other Bamboo products continue to work properly if you upgrade or remove KB Accelerator. You need to install the Shared Assemblies Library on each Web front-end server if **all** of the following are true:

1. Your SharePoint environment has multiple Web front-end servers.
2. You have at least two Bamboo products installed on your farm.
3. You are upgrading or uninstalling an existing Bamboo product.

For more information about the Shared Assemblies Library, read the following KB articles:

- [KB.12439: How to Install the Shared Assemblies Library](#)
- [KB.12437: PROBLEM: Uninstalling or Upgrading One Bamboo Product Causes Another to Stop Working](#)

Installing the Knowledge Base Components

Before you install KB Accelerator, make sure you have the appropriate rights. The account running the installation should be:

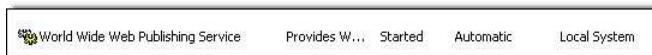
- a member of the local server **Administrators** group
- a member of the SharePoint **farm administrators** group
- a **site collection administrator** for each site collection where KB Accelerator will be available. This is required to automatically activate the site collection feature.

The SharePoint Knowledge Base components only need to be installed on one of the servers in the SharePoint farm running the **Windows SharePoint Services Web Application** service. For a list of servers running this service, navigate to **SharePoint 3.0 Central Administration > Topology and Services**. The components use the SharePoint timer service to automatically deploy to all services in the SharePoint farm that are running the Windows SharePoint Services Web Application service.

Recommendations for a Successful Installation

Follow these guidelines to ensure a successful installation:

1. Make sure that your system meets the requirements outlined in [System Requirements](#).
2. Make sure the person performing the installation has the required permissions for the installation. This person should be a:
 - farm administrator
 - local administrator
 - site collection administrator
3. Make sure the **World Wide Web Publishing Service** (W3SVC) is stopped.
 - To stop the W3SVC, go to **Start > Administrative Tools > Services**.
 - Scroll down to the bottom of the list of services until you see **World Wide Web Publishing Service**.

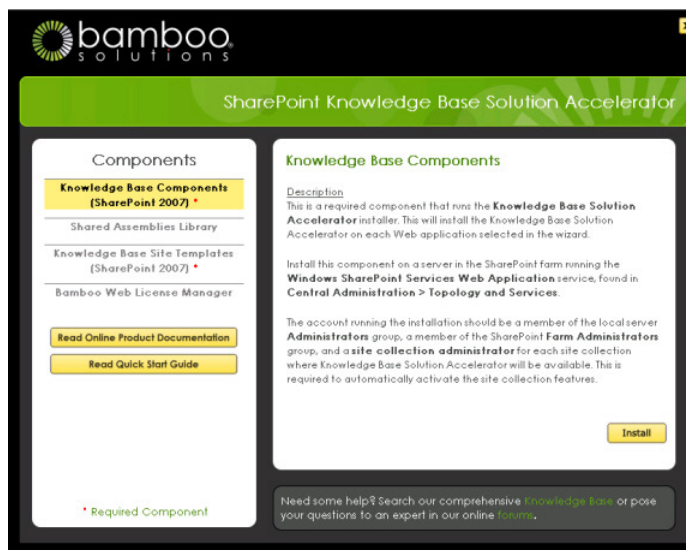


- Right-click on it and select **Stop**.
4. For more information, read [KB.12464: Installation Best Practices](#).

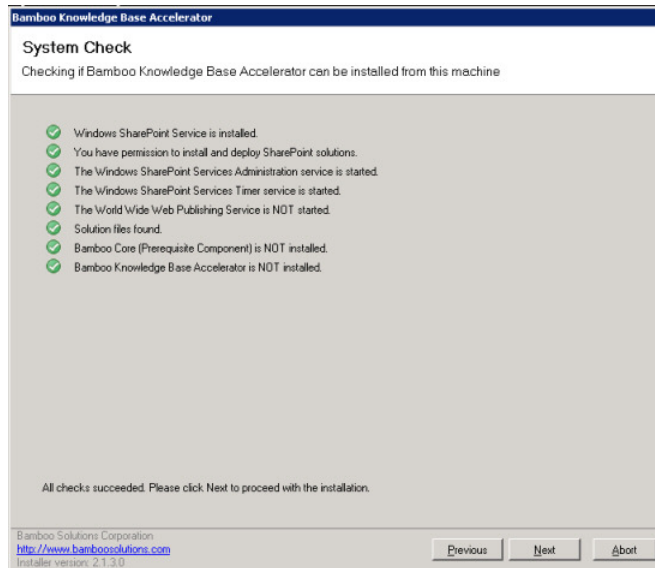
Installing KB Accelerator

To install the **Knowledge Base Components**:

1. Stop the World Wide Web Publishing Service.
2. Select the **Knowledge Base Components** and click install.



3. Click **Next** to begin the installation.
4. The setup wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click **Next**.



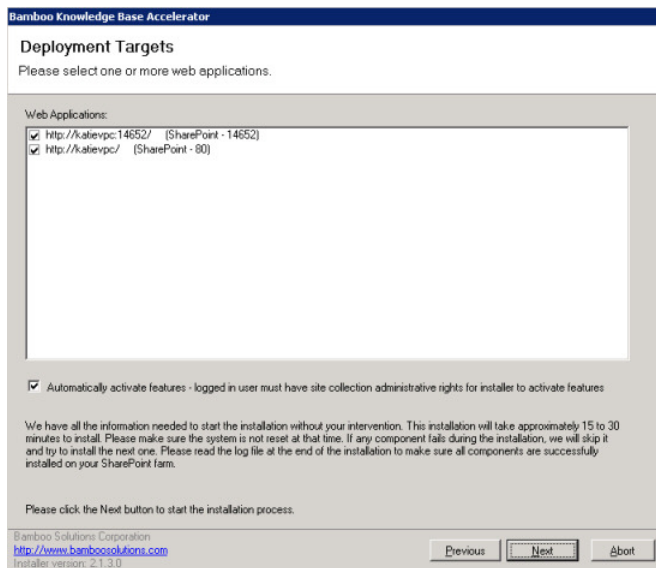
5. Read the end-user license agreement and accept the terms, then click **Next**.



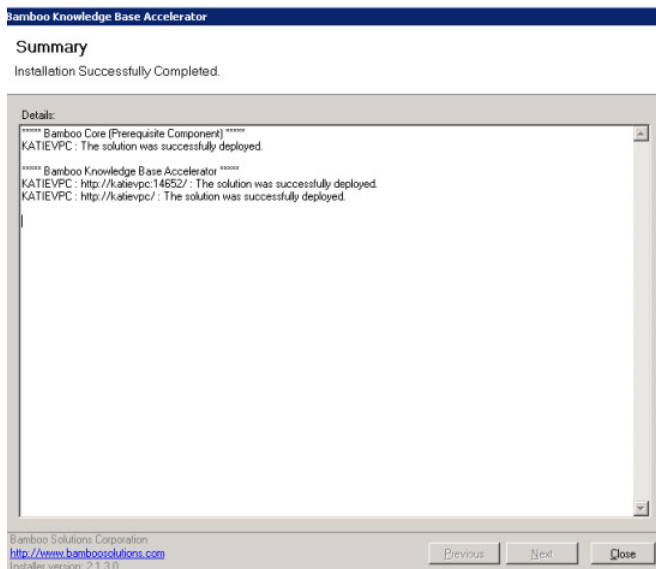
6. Select the Web application(s) where you want to install KB Accelerator. Select **Automatically activate features** to automatically activate KB Accelerator for all site collections within the selected Web application, then click **Next**.

WARNING: You must be logged in to the SharePoint server with a site collection administrator account to automatically activate this feature.

NOTE: If you want to manually activate this feature, you must activate the feature in the **Site Collection Administration** settings. Read [Manually Activating the SharePoint KB Accelerator for a Site Collection](#) for more information.



7. The wizard installs the KB Accelerator components. After the components are installed, click **Next**.
8. Review the log to make sure that the installation was successful.

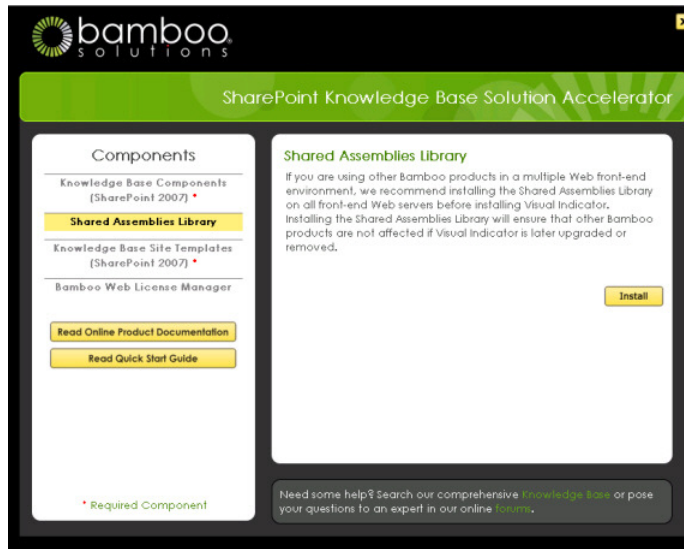


9. Click **Close**.
10. Restart the World Wide Web Publishing Service.

See [Installing the Knowledge Base Site Templates](#) to install the KB site templates.

Additional Information

Although it is not required, it is strongly recommended that you also install the **Shared Assemblies Library** component if you have more than one Bamboo product installed on a multiple Web front-end environment. To install the Shared Assemblies Library, make sure that you are a member of the local server **Administrators** group. Select the **Shared Assemblies Library** component and then click **Install**. Follow the instructions in the setup wizard. Click **Close** when the installation is complete. Repeat these steps on every Web front-end server.



For more information about the Shared Assemblies Library, read the following KB articles:

- [KB.12439: How to Install the Shared Assemblies Library](#)
- [KB.12437: PROBLEM: Uninstalling or Upgrading One Bamboo Product Causes Another to Stop Working.](#)

For more information about the **World Wide Web Publishing Service**, read the following Microsoft articles:

- [IIS World Wide Web Publishing Service \(Windows Server 2003\)](#)
- [IIS World Wide Web Publishing Service \(Windows Server 2008\)](#)

Manually Activating the Product Feature for a Site Collection

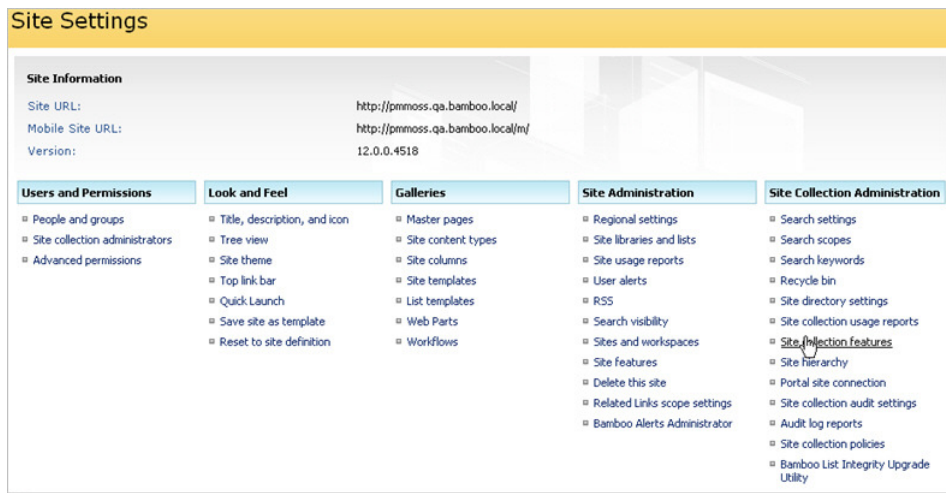
Product feature activations can be done automatically at the site collection level when the product is installed. There are several reasons why you may need to manually activate (or deactivate) Bamboo product features:

- 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. From the top-level site in the site collection, go to **Site Actions > Site Settings > Site Collection Administration > Site Collection Features**.



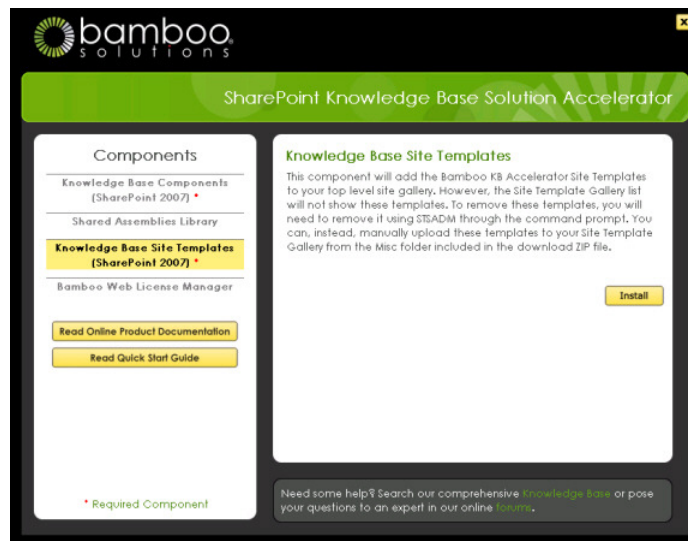
2. Locate the Bamboo product feature. Click **Activate** to activate it for the entire site collection, or click **Deactivate** to deactivate it.

Site Collection Features		Status	
Name		Deactivate	Active
 Bamboo Data-Viewer Web Part Bamboo Data-Viewer Web Part		Deactivate	Active
 Bamboo KB Accelerator Bamboo KB Accelerator		Deactivate	Active
 Bamboo List Integrity Bamboo List Integrity		Deactivate	Active
 Bamboo List Integrity Upgrade Utility Bamboo List Integrity Upgrade Utility. Upgrade from List Integrity v2.0 to List Integrity v2.1		Deactivate	Active
 Bamboo ListRollup WebPart Bamboo ListRollup WebPart		Activate	
 Bamboo My Alerts Organizer Allow SharePoint users to manage there alerts using Bamboo My Alerts Organizer . This Feature was created by Bamboo Solutions Corporation.		Deactivate	Active
 Bamboo Poll Admin Web Part Bamboo Poll Admin Web Part		Activate	
 Bamboo Poll Voting Web Part Bamboo Poll Voting Web Part		Activate	
 Bamboo Project Portfolio Dashboard Bamboo Project Portfolio Dashboard		Deactivate	Active

Installing the Knowledge Base Site Templates

To install the **Knowledge Base Site Templates** component:

1. Click the **Knowledge Base Site Templates** button and then click the **Install** button.



2. A command prompt window automatically displays and runs the upload of the site templates using STSADM.

Note: If you install these templates from the Setup screen, the templates will not show in the Site Template Gallery even though you can still create sites based on them. These templates are installed using STSADM and, if needed, must be removed using STSADM. If you upload these templates manually, then you can manage them from the Site Template Gallery just as you would any other site template.

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.
 - 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`
 - 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`
 - **Navigation (Tabs and Quick Launch)**
 - **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.
 - **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**.

Manually Installing or Uninstalling the SharePoint Knowledge Base Solution Accelerator Components

Use the following stsadm.exe command lines to manually install and uninstall the SharePoint Knowledge Base Solution Accelerator components from the Command Prompt. Stsadm.exe is located in:

```
<drive>:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN\
```

Manually Install the SharePoint Knowledge Base Solution Accelerator Components

1. Add the solution to the SharePoint Solution Store:
`stsadm.exe -o addsolution -filename C:\SA05.R1.SL\SA05.KBAccelerator.wsp\cab\Bamboo.KBAccelerator.wsp`
NOTE: The -filename path is the path where the product download ZIP file exists on the SharePoint server.
2. Deploy the solution for a Web Application:
`Stsadm.exe -o deploysolution -name Bamboo.KBAccelerator.wsp -immediate -url http://WebApplicationUri:455 -allowGacDeployment -allowCasPolicies`
3. Execute the job:
`stsadm.exe -o execadmsvcjobs`
NOTE: If you have multiple web frontends, then you must run this command on each frontend server.

Manually Uninstall the SharePoint Knowledge Base Solution Accelerator Components

1. Retract the solution from a Web Application:
`stsadm.exe -o retractsolution -name Bamboo.KBAccelerator.wsp -immediate -url http://WebApplicationUri:455`
2. Execute the job:
`stsadm.exe -o execadmsvcjobs`
NOTE: If you have multiple web frontends, then you must run this command on each frontend server.
3. Delete the solution from the SharePoint Solution Store (only after the solution is retracted from all web applications, and the retract job is executed on each web frontend):
`stsadm.exe -o deletesolution -name Bamboo.KBAccelerator.wsp`

Uninstalling the Product

1. Double-click the the product EXE file.
2. From the Setup program, click the product component 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/Upgrade 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 & Code Access Security

The table below lists the files that are installed as part of the SharePoint Knowledge Base Solution Accelerator package:

Filename	Type	Purpose
Bamboo.KBAccelerator.dll	Assembly	Solution Accelerator Assembly installed in the Bin
Bamboo.Licensing.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.LicenseManager.Server.dll	Assembly	Web Part Assembly installed in the GAC
Bamboo.Logging.dll	Assembly	Web Part Assembly installed in the GAC
RadAjax.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadCalendar.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadChart.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadEditor.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadGrid.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadInput.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadMenu.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadPanelBar.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadSpell.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadSplitter.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadTabStrip.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadToolBar.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadTreeView.Net2.dll	Assembly	Web Part Assembly installed in the GAC
RadUpload.Net2.dll	Assembly	Web Part Assembly installed in the GAC
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.KBAccelerator.wsp		In case you need to install this Solution Accelerator manually.

Bamboo Core and Shared Assemblies

Shared Assemblies Library or **Bamboo.Core.Vx.x.msi**: Contains common assemblies for many Bamboo products. When you run this msi, it adds the common assemblies for Bamboo products to the Global Assembly Cache (GAC). If you have other Bamboo products in your farm, Bamboo recommends installing this component on all front-end Web servers before installing KB Accelerator. This ensures that your other products are not affected if you later upgrade or remove KB Accelerator.

Bamboo.Core.wsp: Installs new versions of assemblies such as **Bamboo.Logging.dll** and **Telerik.Web.UI.dll**. This ensures that when other Bamboo products are removed from the farm environment, these files are still there for KB Accelerator to run. You can also deploy these files from the solution store.

For more information about the Shared Assemblies Library, read the following articles:

- [KB.12439: How to Install the Shared Assemblies Library](#)
- [KB.12438: How to Determine If Your Product Uses the Merged Assembly Model](#)
- [KB.12437: PROBLEM: Uninstalling or Upgrading One Bamboo Product Causes Another to Stop Working](#)

Code Access Security

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

Class	Name	Version	Public Key Blob
StrongNameMembershipCondition	Bamboo.KBAccelerator	1	0x00240000048000009400000060200000024000052534131000400000100010099189C71722AEBE6ADF12BF1FF2828C9DC20BFB
StrongNameMembershipCondition	Bamboo.Licensing	1	002400000480000094000000602000000240000525341310004000001000100A76FDA645D3FCF461C428E0112290EABE802951AF

If you must install KB Accelerator manually, the following security is needed if a custom security policy file is to be implemented:

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 policy, read the following articles 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](#)

Configuration

- [Security Trimming](#)
- [About the Bamboo Knowledge Base Solution Accelerator Sites, Lists and Web Parts](#)
- [Using Relative Paths](#)
- [Configuring the Bamboo KB Admin Web Parts](#)
- [Configuring the Bamboo KB Client Web Parts](#)
- [Localizing KB Accelerator](#)

Security Trimming

In general, users should follow SharePoint security trimming when setting up user permissions. For example, for the Bamboo KB Articles list, if the KB Administrator wants users on the client side to be able to only read the articles, then the Administrator should set the client group with read-only access. Read the following Microsoft TechNet articles for more information:

- [User Permissions and Permission Levels in WSS 3.0](#)
- [User Permissions and Permission Levels in MOSS 2007](#)

To configure anonymous access to a KB site (Admin or Client), read the following Microsoft TechNet article: [Configure Anonymous Access \(Office SharePoint Server\)](#)

About the Knowledge Base Solution Accelerator Sites, Lists and Web Parts

All of the Web Parts for the **Bamboo KB Admin site** are pre-configured so that you can begin using KB Accelerator as soon as you have created the KB Admin site. However, you can modify the settings of each of these Web Parts to tailor this product to better meet your specific needs.

For more information about configuring KB Accelerator, read [Configuring the Bamboo KB Admin Web Parts](#) and [Configuring the Bamboo KB Client Web Parts](#).

Bamboo KB Admin Site

For the **Bamboo KB Admin site**, the following lists and Web Parts are used. All of the Web pages for the Web Parts are stored in the Shared Documents Library.

Name	Type	Description	Configuration
Bamboo KB Configuration List	List	Designates the name of your e-mail server and the e-mail address from which e-mails will be sent from	Required
KB Picture Library	Library	Stores all pictures uploaded during article creation	N/A
Bamboo Article Questions and Answers	List	A discussion board list that stores all questions from the KB Client site and answers from the KB Admin site through the Answer Questions link on the Quick Launch bar.	N/A
Bamboo KB Article View Counts	List	Determines the number of views for each article in the Knowledge Base. Do not modify this list.	No. Do not modify this list.
Bamboo KB Articles	List	Stores all articles created for the Knowledge Base. Uses content approval to restrict articles from being published before they are reviewed or approved. Articles are published to the KB Client when the Status column is set to Publish . The Status column must be set manually and does not require the Content Approval Status to be set to Approved in order to publish the item. The Content Approval feature in this instance is meant to be a KB Administrator reviewing tool only.	N/A
Bamboo KB Categories	List	Stores the categories used to organize the Knowledge Base.	N/A
Bamboo KB Ratings and Comments	List	Stores all ratings and comments for each article submitted by KB Client users along with a status (i.e. Submitted, Rejected, Published) so the KB Admin can review the	N/A

		submitted comments and determine which comments are posted to the KB Client site .	
Bamboo KB Tag Cloud	List	Stores all tags created for article association, the number of times the tag has been used and in which articles it has been associated.	N/A
Bamboo KB Answer Questions	Web Part	Allows KB Administrators to post the answer to end-user questions in the Bamboo Article Questions and Answers discussion board while at the same time e-mailing the answer to the end user.	Optional
Bamboo KB Display Article	Web Part	Allows the article content to be displayed in a user-friendly format that includes the ability to print and e-mail the article.	Optional
Bamboo KB Search	Web Part	Allows KB Administrators to search articles or comments and ratings to determine their existence, their publishing status and article content approval status.	Optional
Bamboo KB Tree View	Web Part	Displays the category tree on the Home page for navigating the Knowledge Base as well as the Most Popular Articles list and the Latest Additions list.	Optional

Bamboo KB Client Site

All of the Web Parts used in the **KB Client sites** (both **Team Site** and **Meeting Workspace** sites) need to be configured to point to lists in the **KB Admin site**. The **KB Client site** uses lists from the **KB Admin site**. There are no lists in the KB Client site that are used in the Knowledge Base Solution Accelerator sites.

For the **Bamboo KB Client** site, the following Web Parts are used:

Name	Type	Description	Configuration
Bamboo KB Ask Question	Web Part	Allows users to enter and submit a question to KB Administrators.	Required
Bamboo KB Display Article	Web Part	Allows the article content to be displayed in a user-friendly format that includes the ability to print and e-mail the article.	Required
Bamboo KB Search	Web Part	Allows users to search for specific article content or ratings and comments.	Required
Bamboo KB Tree View	Web Part	Displays the category tree on the Home page for navigating the Knowledge Base as well as the Most Popular Articles list and the Latest Additions list.	Required
Bamboo KB Tag Cloud	Web Part	Displays a list of top tags (i.e. articles with the most views that have these tags associated with them) in a tag cloud on the Tag Cloud tab.	Required

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

Configuring the Bamboo KB Admin Web Parts

Setting up the KB Admin site requires very little configuration of the Web Parts and the KB Configuration List used in this site. To configure these Web Parts and the KB Configuration List correctly, please do the following:

1. Configure the **KB Configuration List**.
 - From the KB Admin site, click the **View All Site Content** link on the Quick Launch bar.
 - Select the **Bamboo KB Configuration List**.
 - Edit the **KB Default Settings** item.
 - In the **SMTP Server Name** field, enter the name of your SMTP server for sending e-mail.
 - In the **Email From Account** field, 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.
 - Click **OK**.

2. Configure the **Bamboo KB Tree View Web Part** (on the Home page) - This Web Part is pre-configured, but you can edit the settings.

- Click **Site Actions > Edit Page**, then click the **edit** button on the top right of the Bamboo KB Tree View Web Part. Then select **Modify Shared Web Part**.

- **Enter the site URL for the Bamboo KB Admin site.** This field is already populated for you with the URL. If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
- **Select a Display List.** This field is already preselected for you with the Bamboo KB Articles list.
- **Select the Default View.** Select the list view 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 check box 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 sub categories.
- **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 used for the KB Client site only.
- **Select a Language.** Select this option to set the language used on the user interface of this Web Part. See [Customizing the Translation Settings](#) for more information.

- Click **Apply**, then **OK**.

3. Configure the **Bamboo KB Answer Questions Web Part** (Answer Questions link) - This Web Part is pre-configured, but you can edit the settings.

- From the Quick Launch bar, click the **Answer Questions** link.
- Click the arrow located in the top right corner of the Bamboo KB Answer Questions Web Part title bar. Then select **Modify Shared Web Part**.

- **Select a Question and Answer List.** This is pre-configured to point to the Bamboo Article Questions and Answers discussion board.

- **Select a Configuration List.** This is pre-configured to point to the Bamboo KB Configuration List. Editing this setting is not recommended.
- **Select a Picture Library.** This is pre-configured 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 Authentication 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 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 [Customizing the Translation Settings](#) for more information.
- Click **Apply**, then **OK**.

4. Configure the **Bamboo KB Search Web Part for Searching Articles** - This Web Part is NOT pre-configured. This Web Part is used to search for articles (Manage Articles link).

- From the Quick Launch bar, click the **Manage Articles** link.
- Click the arrow located in the top right corner of the Bamboo KB Search Web Part title bar. Then select **Modify Shared Web Part**.

- **Enter the site URL for the Bamboo KB Admin site.** Enter the URL to the KB Admin site, then click Test Connection. If it is successful, then click the green arrow button to populate the Select a List drop-down box with the lists from the KB Admin site. If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
- **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.
- **Select a List.** Select the Bamboo KB Articles list.
- **Available Columns/Search Columns.** Select the columns from the list that you want to display to the end user for search criteria.
- **Select Search Operator.** Select whether the search performed is an AND search or and OR search.
- **Select a View to Display Search Results.** The KB Admin Search Results view has already been created for you, but you can select a view of your choice.
- **Show Edit Buttons.** Toggles showing the Edit button for each article in the search results list.
- **Show Delete Check Boxes.** Toggles showing the check boxes used for selecting articles to delete from the search results list.
- **Show Column Header.** Toggles showing the column headings in the search results list.
- **Show Maximum Age.** Toggles showing the Maximum Age drop-down list to search by in the search criteria.
- **Keep Search Criteria with Search Results Page.** Toggles keeping the search criteria with the search results.
- **Show Default Value for Search Columns.** Toggles displaying the default values for the columns you selected for entering search criteria.

- o **Show Print Button.** Toggles showing the print button for users to print the search results.
 - o **Select a Language.** Select this option to set the language used on the user interface of this Web Part. See [Customizing the Translation Settings](#) for more information.
 - Click **Apply**, then **OK**.
5. Configure the **Bamboo KB Search Web Part for Searching Categories** - This Web Part is NOT pre-configured. This Web Part is used to search categories for organizing the Knowledge Base (**Manage Categories** link).
- Reference the fields listed above for the KB Search Web Part for Searching Articles except for the **Select a List** drop-down box, select the **Bamboo KB Categories** list.
6. Configure the **Bamboo KB Search Web Part for Searching Ratings and Comments** - This Web Part is NOT pre-configured. This Web Part is used to search for ratings and comments submitted by knowledge base end users (**Approve & Manage** link). Your Bamboo KB Search Web Part tool pane properties should be configured as illustrated below at a minimum for the intended functionality. You can add search columns and select other properties as needed .

Note: If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.

- Reference the fields listed above for the KB Search Web Part for Searching Articles for an explanation of each of the fields.
7. Do not configure the **Bamboo KB Ask Question** or **Bamboo KB Display Article** Web Parts. These are used in the KB Client Site only.

Configuring the Bamboo KB Client Web Parts

The Web Parts in the KB Client Site Template - Meeting Workspace and KB Client Site Template - Team Site need to be configured to point to the lists in the KB Admin site. To configure these Web Parts correctly, please do the following:

1. Configure the **Bamboo KB Tree View Web Part** (on the Home page)
 - Do one of the following:
 - o From the Quick Launch bar, click the **Home** link (For KB Client Site Template - Team Site only).
 - o Click the **Home** tab (For KB Client Site Template - Meeting Workspace only)
 - Click **Site Actions > Edit Page**, then click the **edit** button on the top right of the Bamboo KB Tree View Web Part. Then select **Modify Shared Web Part**.

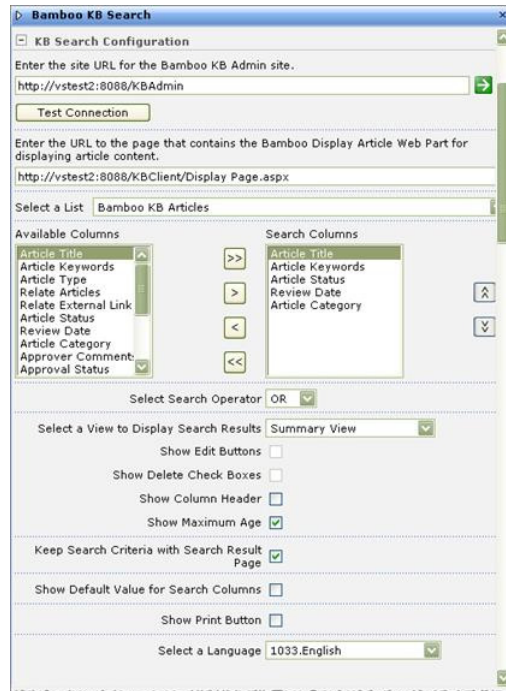
- o **Enter the site URL for the Bamboo KB Admin site.** Enter the URL to the KB Admin site. If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
- o **Select a Display List.** Select the Bamboo KB Articles list.
- o **Select the Default View.** Select the list view you would like displayed in the Most Popular Articles list and the Latest Additions list. The Summary View is recommended.
- o **Show Edit Buttons.** This option is not available to end users.
- o **Show Delete Check Boxes.** This option is not available to end users.
- o **Show Tree View.** Toggles showing the category for navigating the Knowledge Base content.
- o **Show Most Popular Articles.** Toggles showing the Most Popular Articles list, which shows articles that have had the most views.
- o **Show Latest Additions.** Toggles showing the Latest Additions list, which shows the articles that were recently added to the Knowledge Base.
- o **Show All Articles.** Select this check box 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 sub categories.
- o **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.
- o **Enter the URL to the page that contains the Bamboo Display Article Web Part for displaying article content.**

For the **KB Client Site Template - Meeting Workspace**, the URL should be:
http://Your_KBClient_Site_URL/Display%20Page.aspx

For the **KB Client Site Template - Team Site**, the URL should be:
http://Your_KBClient_Site_URL/Shared%20Documents/Display%20Page.aspx

NOTE: If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.

- o **Select a Language.** Select this option to set the language used on the user interface of this Web Part. See [Customizing the Translation Settings](#) for more information.
 - Click **Apply**, then **OK**.
2. Configure the **KB Search Web Part** for searching articles.
 - Do one of the following:
 - o From the Quick Launch bar, click the **Search** link (For KB Client Site Template - Team Site only).
 - o Click the **Search** tab (For KB Client Site Template - Meeting Workspace only)
 3. Click the arrow located in the top right corner of the Bamboo KB Search Web Part title bar. Then select **Modify Shared Web Part**.



- **Enter the site URL for the Bamboo KB Admin site.** Enter the URL to the KB Admin site, then click Test Connection. If it is successful, then click the green arrow button to populate the Select a List drop-down box with the lists from the KB Admin site. If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
- **Enter the URL to the page that contains the Bamboo Display Article Web Part for displaying article content.**

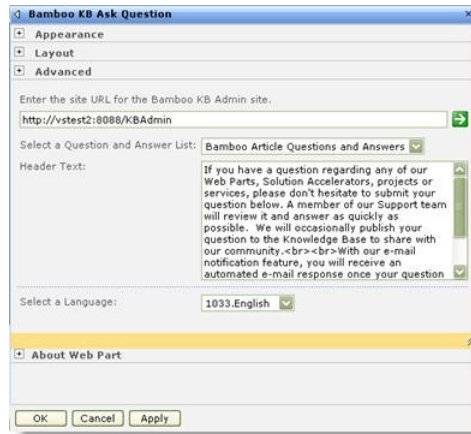
For the **KB Client Site Template - Meeting Workspace**, the URL should be:
http://Your_KBClient_Site_URL/Display%20Page.aspx

For the **KB Client Site Template - Team Site**, the URL should be:
http://Your_KBClient_Site_URL/Shared%20Documents/Display%20Page.aspx

NOTE: If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.

- **Select a List.** Select the Bamboo KB Articles list.
- **Available Columns/Selected Columns.** Select the columns from that list that you want to display to the end user for search criteria.
- **Select Search Operator.** Select whether the search performed is an AND search or and OR search.

- **Select a View to Display Search Results.** Select the Summary View.
 - **Show Edit Buttons.** This option is not available to end users.
 - **Show Delete Check Boxes.** This option is not available to end users.
 - **Show Column Header.** Toggles showing the column headings in the search results list.
 - **Show Maximum Age.** Toggles showing the Maximum Age drop-down list to search by in the search criteria.
 - **Keep Search Criteria with Search Results Page.** Toggles keeping the search criteria with the search results.
 - **Show Default Value for Search Columns.** Toggles displaying the default values for the columns you selected for entering search criteria.
 - **Show Print Button.** Toggles showing the print button for users to print the search results.
 - **Select a Language.** Select this option to set the language used on the user interface of this Web Part. See [Customizing the Translation Settings](#) for more information.
 - Click **Apply**, then **OK**.
4. Configure the **Bamboo KB Ask Question Web Part**.
- Do one of the following:
 - From the Quick Launch bar, click the **Ask a Question** link (For KB Client Site Template - Team Site only).
 - Click the **Ask a Question** tab (For KB Client Site Template - Meeting Workspace only)
 - Click the arrow located in the top right corner of the Bamboo KB Ask Question Web Part title bar. Then select **Modify Shared Web Part**.



The screenshot shows the configuration dialog for the 'Bamboo KB Ask Question' web part. It has a title bar with a close button. The dialog is organized into sections: 'Appearance', 'Layout', and 'Advanced'. Under 'Advanced', there is a text box for 'Enter the site URL for the Bamboo KB Admin site.' with the value 'http://vstest2:8088/KBAdmin' and a green arrow button. Below that is a 'Select a Question and Answer List:' dropdown menu set to 'Bamboo Article Questions and Answers'. A 'Header Text:' field contains a paragraph of text: 'If you have a question regarding any of our Web Parts, Solution Accelerators, projects or services, please don't hesitate to submit your question below. A member of our Support team will review it and answer as quickly as possible. We will occasionally publish your question to the Knowledge Base to share with our community. With our e-mail notification feature, you will receive an automated e-mail response once your question'. A 'Select a Language:' dropdown is set to '1033.English'. At the bottom, there is an 'About Web Part' section and three buttons: 'OK', 'Cancel', and 'Apply'.

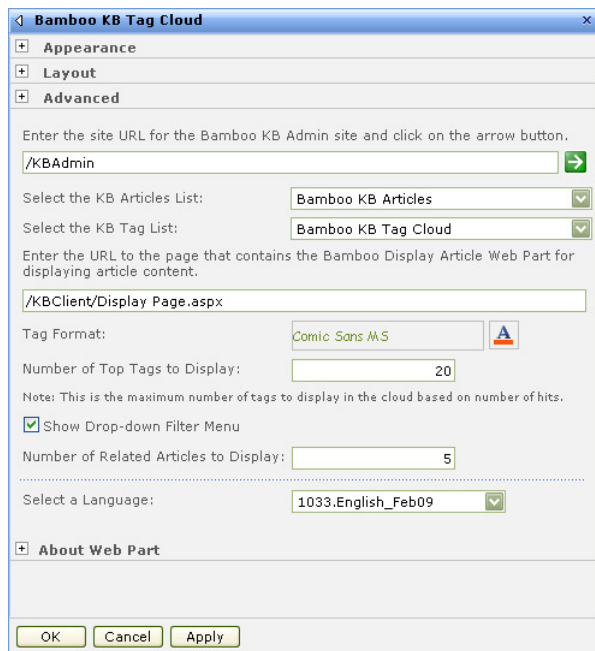
- **Enter the site URL for the Bamboo KB Admin site.** Enter the URL to the KB Admin site, then click the green arrow button to populate the Select a Question and Answer List drop-down box with the lists from the KB Admin site. If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
 - **Select a Question and Answer List.** Select the Bamboo Article Questions and Answers list.
 - **Header Text.** Enter the text that you want to display at the top of the Web Part to help users understand how you 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 [Customizing the Translation Settings](#) for more information.
 - Click **Apply**, then **OK**.
5. Configure the **Bamboo KB Display Article Web Part**.
- Do one of the following:
 - Access the Bamboo KB Display Article Web Part at the following URL for the KB Client Site Template – Meeting Workspace:
http://Your_KBClient_Site_URL/Display%20Page.aspx
 - Access the Bamboo KB Display Article Web Part at the following URL for the KB Client Site Template – Team Site:
http://Your_KBClient_Site_URL/Shared%20Documents/Display%20Page.aspx
 - **NOTE:** You can also access the Display Page.aspx from the Shared Documents Library.
 - **NOTE:** If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
 - Click the arrow located in the top right corner of the Bamboo KB Display Article Web Part title bar. Then select **Modify Shared Web Part**.

- o **Enter the site URL for the Bamboo KB Admin site.** Enter the URL to the KB Admin site, then click the green arrow button to populate the drop-down boxes below with the lists from the KB Admin site. If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
- o **Select the KB Articles List.** Select the Bamboo KB Articles list.
- o **Select the KB Article View Count List.** Select the Bamboo KB Article View Counts list.
- o **Select the KB Configuration List.** Select the Bamboo KB Configuration List.
- o **Select the KB Rating and Comments List.** Select the Bamboo KB Rating and Comments List.
- o **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.
 - o **Section Name.** Enter in the name of the custom related article information section.
 - o **Tab 1 Title.** Enter in the name of the first tab.
 - o **Tab 2 Title.** Enter in the name of the second tab.
 - o **Tab 3 Title.** Enter in the name of the third tab.
 - o **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.
 - o **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.
- o **Use SMTP Secure Authentication Connection.** Select this check box to enter in credentials for SMTP authentication.

- o **User ID.** Enter in the user ID.
- o **Password.** Enter in the password for the user ID.
- o **Port.** Enter in the port number.
- o **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.
- o **Allow Article Rating.** Select this check box 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.
- o **Numerical Rating or Star Rating.** The Allow Article Rating check box 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.
- o **Hide Article Keyword(s) in Article Title Bar.** Select this check box to hide the article keyword(s) from the title bar of the article.



- o **Select a Language.** Select this option to set the language used on the user interface of this Web Part. See [Customizing the Translation Settings](#) for more information.
6. Configure the **Bamboo KB Tag Cloud Web Part** - This Web Part is NOT pre-configured. This Web Part is used to allow users to locate articles that have been viewed the most times by selecting a most commonly used key word (i.e. tag) from the tag cloud. The tag cloud is the list of tags displayed in the Web Part. Some tags have a larger or smaller font size indicating how often articles with that associated tag have been viewed.



- **Enter the site URL for the Bamboo KB Admin site.** This field is already populated for you with the URL. If you want to make this URL relative, see [Using Relative Paths](#) for more information on the syntax.
- **Select a Display List.** This field is already preselected for you with the Bamboo KB Articles list.
- **Select the Default View.** Select the list view you would like displayed in the Most Popular Articles list and the Latest Additions list.
- **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.
- **Tag Format.** Click the font button to select a font type, style, color, background color, alignment, decoration, etc.
- **Number of Top Tags.** 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 [Customizing the Translation Settings](#) for more information.
- Click **Apply**, then **OK**.

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.

Simple Print

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.

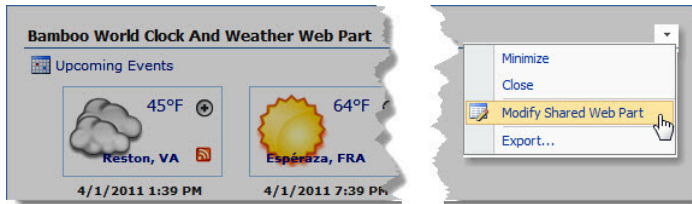
The installation program will not remove or overwrite translation files you have created if they are named differently from the default resource files included with the product. However, product upgrades may require that you modify custom translation files to include new resource strings that were added 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

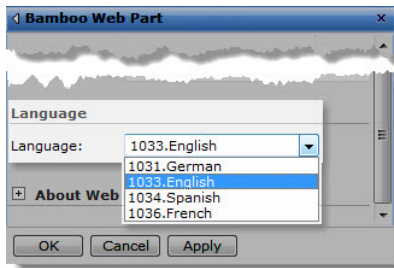
The instructions below for changing language file settings apply to Bamboo products with settings configured in the [Web Part tool pane](#) or Web Part Settings [pop-up page](#).

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**.



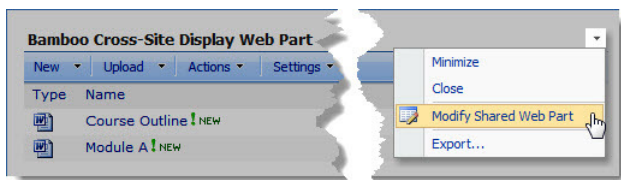
2. In the **Language** settings section of the Web Part tool pane, select the language file you want to use.



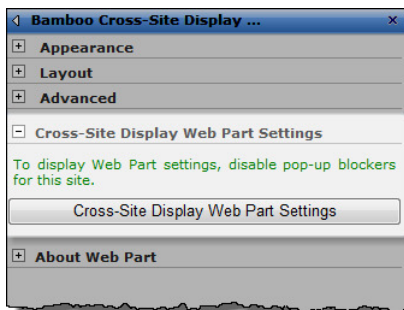
3. Click **Apply** and then **OK** in the Web Part tool pane to apply your changes.

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

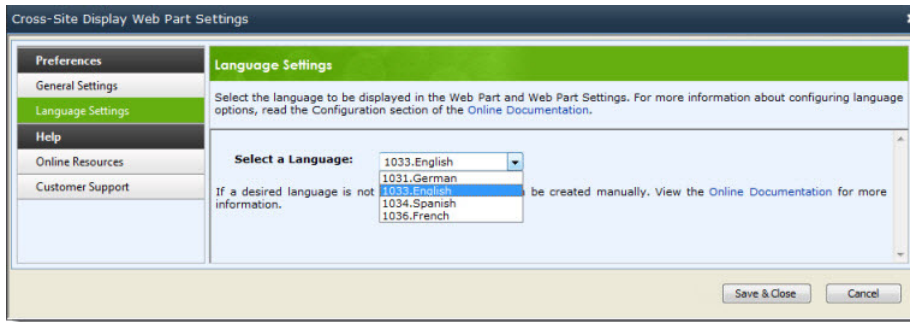
1. From the Web Part, click the edit drop-down arrow on the Web Part title bar and select **Modify Shared Web Part**.



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.

About Licensing

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.

Installing the Bamboo Web License Manager

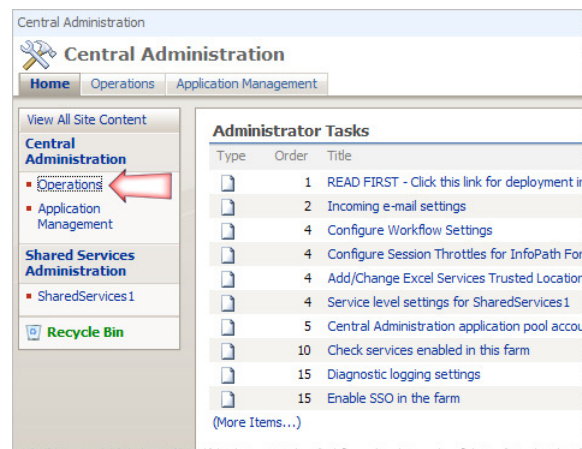
1. On the server where SharePoint Central Administration is installed, then from the Setup program screen, click the **Bamboo Web License Manager** component button, then click **Install**.
2. Click **Next** to continue.
3. The program performs some system checks to determine whether your server is ready 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](#).

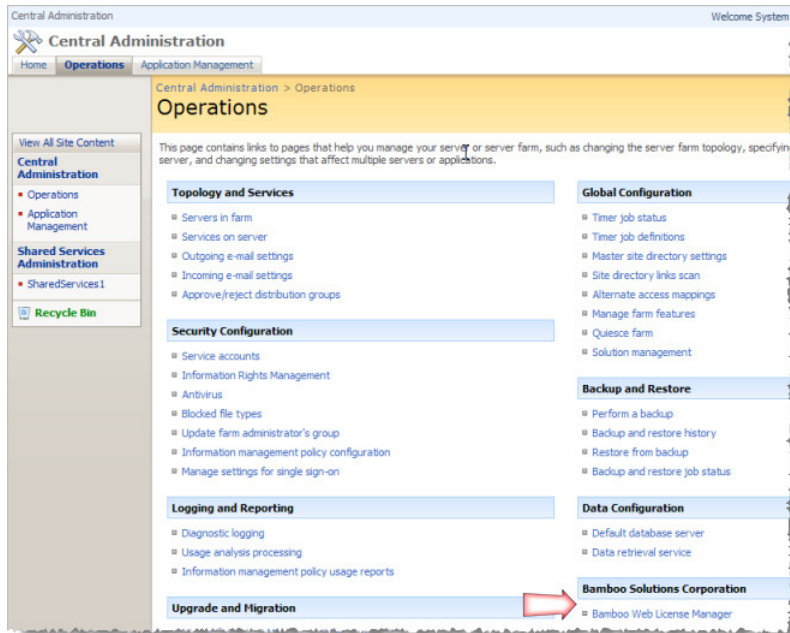
[TOP](#)

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.



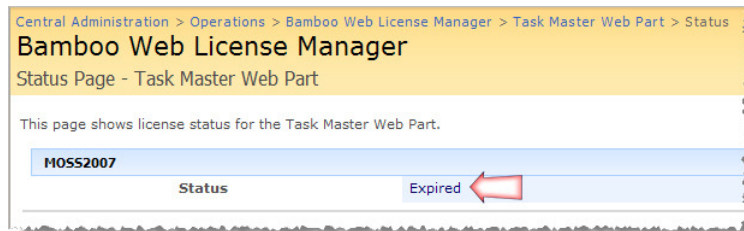
2. Under the **Bamboo Solutions Corporation** section, click **Bamboo Web License Manager**. Note: If you have not yet installed any Bamboo products, the Web License Manager does not show any products.



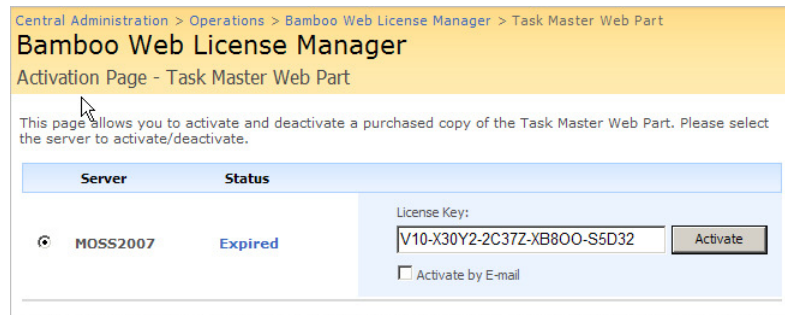
- Expand the **Individual Products** or **Suites** section (depending on the product you want to license), locate your product, and click the product name to view the license status or click the drop-down arrow to **Activate/Deactivate** or view the **Status**.



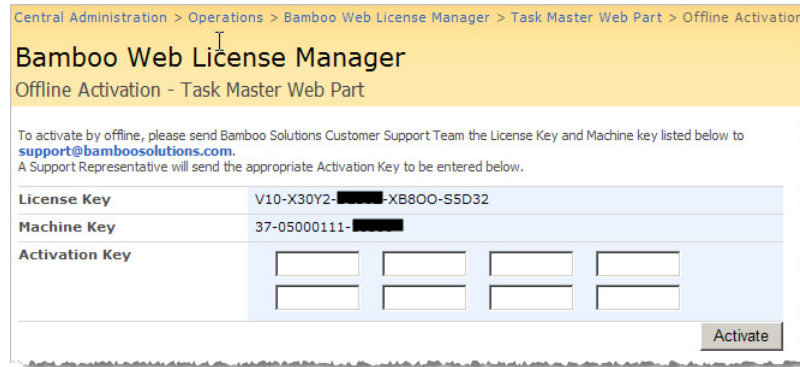
- Do one of the following:
 - If you want to activate the product without viewing the status, click **Activate/Deactivate** from the drop-down (see screenshot above).
 - If you are viewing the licensing Status, then click the status to activate or deactivate the license.



- Do one of the following:
 - To activate online, type or copy and paste the license key into the field provided and click **Activate**.



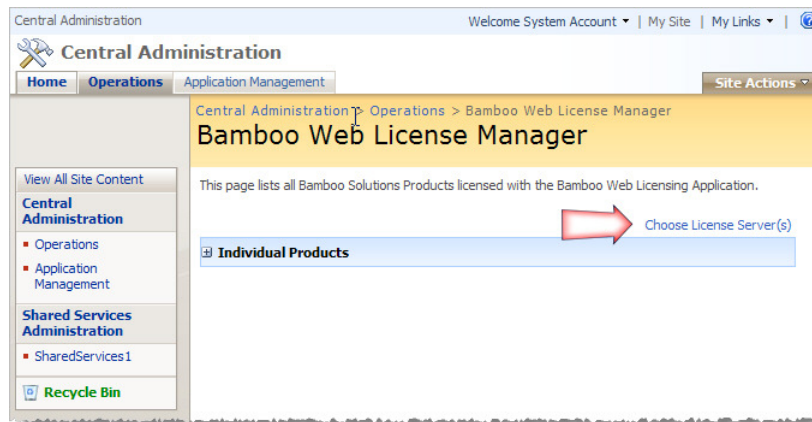
- To activate by email, enter the license key and select the **Activate by E-mail check box**, then click **Activate**.



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.



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