MadCap Software

Pulse Guide

Flare 10

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THIS GUIDE WAS CREATED USING MADCAP FLARE.

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CHAPTER 1

About MadCap Pulse

This feature is supported in HTML5, WebHelp, and WebHelp Plus output.

Pulse is a documentation-centric social collaboration platform that enables you to connect, collaborate, and share knowledge with fellow authors, employees, and your end users. It functions much like many of the social media websites on the Internet, except it revolves specifically around your online output.

This chapter discusses the following:

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Types of Users

Pulse gives you to form communities and groups around the following different types of users, who can all use Pulse to communicate and facilitate exchange of ideas and information.

- **Administrators** Administrators are users who have complete access to all Pulse features and functionality. They have exclusive control over deleting other users' content, adjusting server settings, and accessing reports.
- **Employees (Advanced Users)** These are users who have been given a higher level of access to Pulse features and functionality by the Administrator. They have a wider range of options when it comes to directly communicating and interacting with other users, ranking topics, voting on answers, and filtering content. They do not necessarily have to be employees of your company. That is simply the term used in Pulse.
- **Customers (Basic Users)** These are users who have basic access to Pulse features and functionality, such as creating a profile, subscribing to topics, and posting content such as comments, articles, questions, and multimedia. They do not necessarily have to be customers of your company. That is simply the term used in Pulse.
- **General Public (Unregistered)** These users have restricted access to Pulse. They can read comments, search comments, see topic ratings, and add a topic rating.

Installation

The following describe installation information and steps for Pulse:

1. **System Requirements** As you prepare for your Pulse installation, familiarize yourself with the minimum system requirements. See "Pulse System Requirements" on page 11.
2. **Deployment Types** Pulse can be installed on one or more systems running the required version of Windows Server. The installation type that you choose will largely depend on factors that are specific to your environment, such as the number of users you plan to host, your web usage, and other factors related to deploying an SQL database and IIS server. See "Deployment Types" on page 21.
3. **Install the Prerequisites** To prepare for a Pulse installation, you will need to prepare the systems that will be hosting the Pulse server application and the Microsoft SQL Server instance for the Pulse database. See "Installing the Prerequisites" on page 23.
4. **Install Microsoft SQL Server** You can install a Microsoft SQL Server instance to use as the Pulse database. This instance can reside on the Pulse web server (this is the server running IIS) or on a different system with access to the Pulse web server. See "Installing Microsoft SQL Server" on page 47.
5. **Install Pulse** After preparing the Pulse web server and database server for the installation process, you can install Pulse. See "Installing and Activating Pulse" on page 78.
6. **Pulse Server Configuration** After the Pulse server application is installed on the Pulse web server, use the desktop shortcut or the Programs menu in Windows to start the Pulse application. See "Pulse Server Configuration" on page 89.
7. **Integrate Flare With Pulse** To integrate the embedded discussion forms and other Pulse features with your Flare output, add a new community in Flare. This action automatically creates a new system in Pulse, allowing your web server to host, store, and serve the embedded discussion forms that appear below the topics in your Flare output. This system also gives you and your team members the ability to moderate and administer the Pulse features and content from the Pulse dashboard. See "Integrating Flare and Pulse" on page 112.

Dashboard

The Pulse dashboard is the web-based interface to the Pulse system. Depending on your group membership, authorized users can use the dashboard to configure a variety of server settings, administer users and groups, moderate the Pulse content associated with your Flare output, and access some basic end user features. See "About the Pulse Dashboard" on page 163.

Using Pulse

After Pulse is set up and integrated with your Flare output, using the features of Pulse involves the following:

- **Getting Started**
  - **Registering** When you integrate a Pulse system with a Flare community, there are two methods for joining the community. Both methods require you to register and activate an account. See "Registering for a Pulse Account" on page 282.
  - **Logging In** Once you have registered for a Pulse account, you can log in to the Pulse dashboard or you can log in to the published Flare output to use the community features. See "Logging In to Pulse" on page 288.
  - **Creating and Editing Profile** Registered Pulse users can edit their account profile by changing their personal information, uploading a profile images, and specifying their notification settings. See "Editing Your Profile" on page 293.
- **Posting Content** Users can post content in a variety of ways, including status updates, questions, articles, and tasks. See "Posting Content" on page 297.
- **Responding to Posts** Users can respond to posts by adding comments; following, liking, and tagging posts; and mentioning documents, people, and groups. See "Responding to Posts" on page 310.
- **Messaging** The Messages app gives you the ability to read, send, and hide conversations with other Pulse users. You must access the Messages app from the Pulse dashboard. Messages are not accessible from the Flare content. See "Messaging Tasks" on page 321.
- **Moderating Pulse** If you are a member of the Administrators or Employees group, there are two user interfaces for moderating the activity in your Pulse system. You can use the Flare output and/or the Pulsedashboard. See "Moderating Pulse" on page 330.
- **Searching Pulse** When integrating a Pulse system with a Flare community, you have two different search options. You can search a feed in Pulse or, if you enable the feature, you can extend the scope of a Flare search to include the Flare community results stored in Pulse. See "Searching for Community Results" on page 408.

Note: Although it is similar to Feedback, Pulse is newer and offers a more complete solution for incorporating social collaboration in your output. There is an upgrade path for Feedback users who would like to move to Pulse. This can be done when you install Pulse. There is an option to "Import Feedback Data." This wipes out your new Pulse database and imports all of your Feedback data.

When you import a database from Feedback, your report data, comments, and users are imported. Since Feedback users do not have a password associated with their email address, their passwords are their email addresses (e.g., if you have a user with bob@email.com, his password will now be bob@email.com). However, users can change their passwords by clicking “I forgot my password” from a Pulse login screen.

Note: MadCap Pulse is an optional feature in Flare that is sold separately.

CHAPTER 2

Pulse System Requirements

As you prepare for your Pulse installation, familiarize yourself with the minimum system requirements.

This chapter discusses the following:

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Pulse Web Server

The Pulse web server provides users the ability to access and use the web-based user interfaces of the Pulse system.

WEB SERVER—MINIMUM HARDWARE REQUIREMENTS

This table details the minimum hardware requirements for the Pulse web server:

Component	Minimum Requirement (for a Pilot Server)	Recommended (for a Production Server)
Processor	32-bit, quad-core	64-bit, quad-core
Memory	4 GB	4 GB
Hard Disk	100 GB (for data drives) 80 GB (for system drives) For daily operations, maintain at least twice as much free space as RAM.	100 GB (for data drives) 80 GB (for system drives) For daily operations, maintain at least twice as much free space as RAM.

WEB SERVER—OPERATING SYSTEM REQUIREMENTS

This table details the operating system requirements to install the Pulse web server:

Important: All of the latest Windows service packs and critical updates must also be installed.

Server OS	Requirement	Notes
Windows Server 2008 R2	**Microsoft Windows Installer (MSI) 5.0**	The MSI 5.0 is included with the operating system.
	Internet Information Services Version 7 (IIS 7.5)	This is included with the operating system. Use the Server Manager to add the Web Server (IIS) role service.
	ASP.NET 4.0	This is included with the operating system. Use the Server Manager to add the ASP.NET role service.
	Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)	This is included with the operating system. This may already be installed on your server, typically by a Network Administrator. If it is not installed, you can use the Server Manager to add this feature.

Server OS	Requirement	Notes
Windows Server 2008	**Microsoft Windows Installer (MSI) 4.5 or later**	The MSI 4.5 or later is not included with the operating system. You can download version 4.5 or later and install it from the Microsoft Download Center.
	Internet Information Services Version 7 (IIS 7.0)	This is included with the operating system. Use the Server Manager to add the Web Server (IIS) role service.
	ASP.NET 4.0	This is included with the operating system. Use the Server Manager to add the ASP.NET role service.
	Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)	This is not included with the operating system. You must download it from the Microsoft Download Center. Ensure that you download the Full Package and not the Client Package.

WEB SERVER—PULSE SETUP PROGRAM

The Pulse setup program installs the Pulse application on the Pulse web server (this is the server running IIS). Before running the setup program, you must install these prerequisites (see "Installing the Prerequisites" on page 23):

- Microsoft .NET Framework 3.5 Service Pack 1

  AND

- Microsoft .NET Framework 4.0

The Pulse setup program will also check the server to ensure it is running the Microsoft Visual C++ 2010 Redistributable.

Note: The Pulse setup program is not supported by the Microsoft .NET Framework 4.5.

WEB SERVER—RECOMMENDED BROWSERS

For best results, it is recommended that you use one of these web browsers when accessing the web-based Pulse tools:

Browser	Version
Microsoft Internet Explorer	7 or later
Apple Safari	5
Mozilla Firefox	3.5 and later
Google Chrome	5.0 and later

Pulse Database Server

The Pulse database server is the primary repository for Pulse data. This includes users, groups, files, messages, videos, and images.

DATABASE SERVER—MINIMUM HARDWARE REQUIREMENTS

This table details the required hardware components for the Pulse Database server:

Component	Minimum Requirement (for Pilot)	Recommended (for Production)
Processor	32-bit, 4 core	64-bit, 4 core
Memory	4 GB	4 GB
Hard Disk	100 GB (for data drives) 80 GB (for system drives) For daily operations, maintain at least twice as much free space as RAM.	100 GB (for data drives) 80 GB (for system drives) For daily operations, maintain at least twice as much free space as RAM. **For every 1,000 users per year, we recommend 100 GB for storage.**

DATABASE SERVER—OPERATING SYSTEM REQUIREMENTS

This table details the operating system requirements for the Pulse database server:

Important: All of the latest Windows service packs and critical updates must also be installed.

Server OS	Requirement	Notes
Windows Server 2008 R2	**Microsoft Windows Installer (MSI) 5.0 or later**	Included with operating system.
	Internet Information Services Version 7 (IIS 7.0)	Included with the operating system. Use the Server Manager to add the Web Server (IIS) role service.
	ASP.NET 4.0	Included with the operating system. Use the Server Manager to add the ASP.NET role service.
	Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)	Included with the operating system. This may already be installed on your server, typically by a Network Administrator. If it is not installed, you can use the Server Manager to add this feature.

Server OS	Requirement	Notes
Windows Server 2008	**Microsoft Windows Installer (MSI) 4.5 or later**	Not included with the operating system. You can download and install it from the Microsoft Download Center.
	Internet Information Services Version 7 (IIS 7.0)	Included with the operating system. Use the Server Manager to add the Web Server (IIS) role service.
	ASP.NET 4.0	Included with the operating system. Use the Server Manager to add the ASP.NET role service.
	Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)	Included with the operating system. You must download it from the Microsoft Download Center. Ensure that you download the Full Package and *not* the Client Package.
	Microsoft Visual C++ 2010 Redistributable	Not included with the operating system. If the operating system is not running Microsoft Visual C++ 2010 or newer, you are prompted to download and install it.

DATABASE SERVER—SQL SERVER REQUIREMENTS

To give end users the ability to use the Pulse search features, you must install a supported version of Microsoft SQL Server. As shown in the table below, the edition you install must support the full-text search feature:

Version	Datacenter	Enterprise	Standard	Workgroup	Web	Express	Express Tools	Express With Advanced Services
Microsoft SQL Server 2008	—	✓	✓	✓	✓	✗	✗	✓
Microsoft SQL Server 2008 R2	✓	✓	✓	✓	✓	✗	✗	✓

Important: If you are installing Microsoft SQL Server 2008 on Windows Server 2008 R2, you must upgrade the operating system to Service Pack 1 (SP1) or later. This resolves known compatibility issues between Microsoft SQL and Windows Server.

Important: Microsoft SQL Server Express Edition with Advanced Services is the *only* Express edition from Microsoft that is compatible with Pulse. This is because Pulse requires the full-text search feature.

Important: Microsoft SQL Server Express with Advanced Services edition supports a maximum database size of 10 GB. It is best suited when used in lab/test environments. It is not recommended for production environments.

Important: The setup program for the Express with Advanced Services edition does not install these prerequisites: NET Framework 3.5 Service Pack 1, Windows Installer 4.5, and Windows PowerShell 1.0. *If you choose to install this edition, always install these prerequisites first.*

Required Access Credentials and Networking Information

The user performing the installation will also need the following information in order to complete the installation and configuration tasks:

Item	Requirements	Purpose
Active Directory Domain Account	Create a Domain Account with Local Administrator Rights for the Pulse Server. This account will need: » A password that never expires » A valid email address in Active Directory » Read access to Active Directory » You should also grant this account System Administrator (sysadmin) privileges in SQL Server.	Used by the PulseService on the application server to schedule notifications, send emails, and deliver posts. Used by the Web Application Pool.
DNS Entry	» Resolves to the Pulse web server » Uses a fully qualified domain name	The URL that Pulse Administrators use to access the Pulsedashboard. **EXAMPLE** pulse.example.com
Outbound Email Settings (SMTP Relay)	Port 25 (typical, depends on your network)	Gives Pulse the ability to send outbound email messages. **EXAMPLE** smtp.example.com

Item	Requirements	Purpose
Inbound Email Settings	To enable reply-to email capabilities, you will need settings for one of the following: » POP3 host, username, and password OR » Exchange Web Services URL,domain, username, and password for the Microsoft Exchange account OR » SMTP Drop Folder	Required by Pulse web server to provide reply-to email capabilities.
SSL Certificate for Pulse Web Server (Optional)	If you plan to use the Secure Sockets Layer (SSL) protocol to establish an encrypted connection with your Pulse site, you must obtain an SSL certificate from an SSL provider and install it on the Pulse web server.	Gives site visitors the ability to access your site using the secure https:// protocol. Use the Internet Information Services (IIS) Manager to install the SSL Certificate.

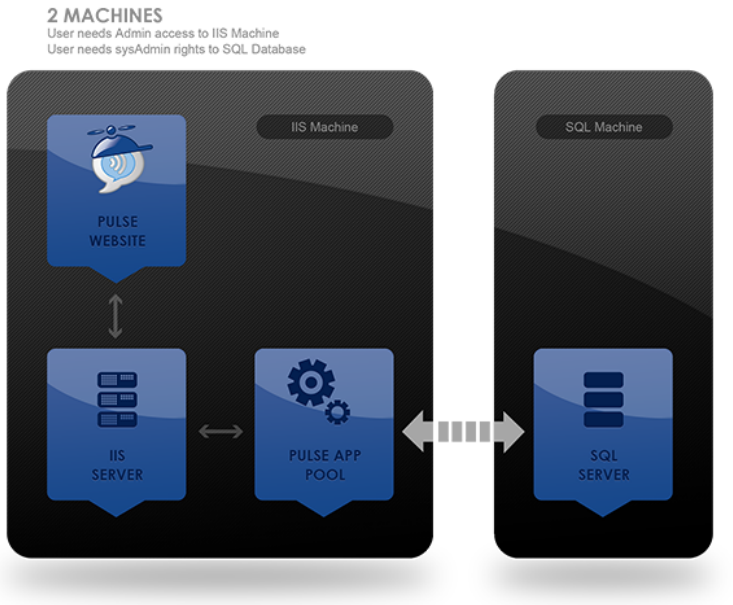
Deployment Types

Pulse can be installed on one or more systems running the required version of Windows Server. The installation type that you choose will largely depend on factors that are specific to your environment, such as the number of users you plan to host, your web usage, and other factors related to deploying an SQL database and IIS server.

Two-Server Deployment

The most common deployment type for Pulse is to install the components in a distributed environment on two servers:

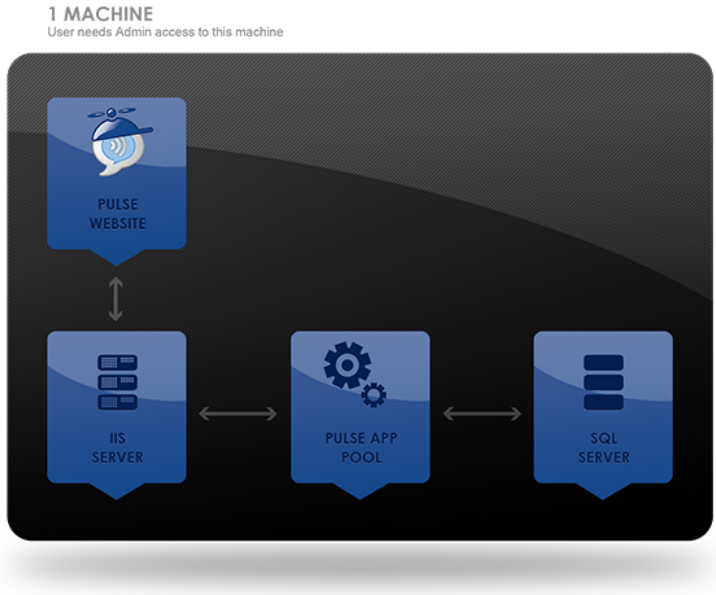
- **Pulse Web Server** The web server is a Windows Server system running Microsoft Internet Information Services (IIS). You install the Pulse server application on this system.
- **Pulse Database Server** The database server is a Windows Server system running Microsoft SQL Server. You install an instance of Microsoft SQL and create the Pulse database on this system.



After deploying Pulse, the integrated Flare output can be published either to the Pulse web server or to a different system with access to the Pulse web server.

Single-Server Deployment

It is also possible to install all of the Pulse components on a single server. This means the Pulse web server and database server are running on a single system. Although this is a simple way to deploy Pulse, most organizations choose to install Pulse in a distributed environment because it offers greater scalability and performance.



After deploying Pulse, the integrated Flare output can be published either to the Pulse server or to a different system with access to the Pulse server.

Important: When deciding which installation type is best for your environment, it is recommended that you discuss your options, deployment strategy, and system requirements with your IT department.

Installing the Prerequisites

Information for Network Administrators

To prepare for a Pulse installation, you need to prepare the systems that will be hosting the Pulse server application and the Microsoft SQL Server instance for the Pulse database.

Before You Begin

In order to download and install the prerequisites, you need an Internet connection.

You also need the ability to log on the server(s) as a user who has access permissions to install software and change configuration settings on the system. This requires you to have access credentials for one of these accounts:

- **The Built-in Administrator Account for Windows Server** This account has full administrative privileges and is included with the operating system by default. See the person who installed the server's operating system for the user name and password.

  OR

- **A Local User Account with Administrative Privileges** If available in your environment, you can use a local administrator account. With a local administrator account, the server checks its own files to authenticate the user and determine if they have the appropriate administrative rights to install software on the system. This account is created on the server, typically by a Network Administrator.

Prerequisites Summary

Following are prerequisite summaries for the Pulse web server and database server.

PULSE WEB SERVER

The table below lists the prerequisites for running the Pulse setup program on the system designated as the Pulse web server:

Task	Windows Server 2008 R2	Windows Server 2008
Install and Update the Operating System	Install the OS and update with all of the latest service packs and security updates.	
Install IIS (and ASP.NET)	Use the Server Manager to add the Web Server (IIS) and ASP.NET role service. You will install IIS Version 7.5.	Use the Server Manager to add the Web Server (IIS) and ASP.NET role service. You will install IIS Version 7.0.
Install Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)	The .NET Framework 3.5.1 features can be added via the operating system. Use the Server Manager to add this feature.	This is not included with the operating system. You can download and install it from the Microsoft Download Center at: **http://www.microsoft.com/en-us/download/details.aspx?id=22**
Install Microsoft .NET Framework 4.0 (Full Package)	This is not included with the operating system. You can download and install it from the Microsoft Download Center at: **http://www.microsoft.com/en-us/download/details.aspx?id=17718**	
Add Windows Installer 4.5 or Later	You do not need to install it. The operating system should already be running 5.0, which meets the requirements.	If the operating system is not running Windows Installer 4.5 or later, you can download and install it from the Microsoft Download Center at: **http://www.microsoft.com/en-us/download/details.aspx?id=8483**
Microsoft Visual C++ 2010 Redistributable	The Windows Server 2008 R2 includes a newer version. The Pulse setup program checks for compatible versions, and you will not typically need to install this redistributable.	If the operating system is not running Microsoft Visual C++2010 or a newer version, you will be prompted to download and install it by the Pulse setup program.

PULSE DATABASE SERVER

The table below lists the prerequisites for setting up an SQL instance on the server hosting the Pulse database:

Task	Windows Server 2008 R2	Windows Server 2008
Install and Update the Operating System	Install the OS and update with all of the latest service packs and security updates. **Important:** If you will be installing Microsoft SQL Server 2008 on Windows Server 2008 R2, you must upgrade the operating system to Service Pack 1 (SP1) or later. This resolves known compatibility issues between SQL and the operating system.	Install the OS and update with all of the latest service packs and security updates.
Install Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)	The .NET Framework 3.5.1 features can be added via the operating system. Use the Server Manager to add this feature.	This is not included with the operating system. You can download and install it from the Microsoft Download Center at: **http://www.microsoft.com/en-us/-download/details.aspx?id=22**
Add Windows Installer 4.5 or Later	You do not need to install it. The operating system should already be running 5.0, which meets the requirements.	If the operating system is not running Windows Installer 4.5 or later, you can download and install it from the Microsoft Download Center at: **http://www.microsoft.com/en-us/-download/details.aspx?id=8483**
Install Windows PowerShell 1.0	You do not need version 1.0. A newer version (2.0) is included with the operating system. It is already installed by default.	Windows PowerShell 1.0 is required only when using Microsoft SQL Server 2008 R2 Express Edition with Advanced Services with Pulse. PowerShell is not required for the other supported editions of SQL. PowerShell can be added via the operating system. Use the Server Manager to add this feature.

Installing the Prerequisites

First, install one of the supported server operating system versions on the systems acting as the Pulse web server and Pulse database server. Whether you are setting up a new server or just using an existing Windows server, you should also ensure that the operating system is updated with all of the latest service packs, critical patches, and security updates from Microsoft.

Important: If you are not familiar with how to install a server operating system, contact your Windows Administrator and/or Network Administrator for assistance. This will help to ensure that your server is in compliance with any security and network requirements specific to your environment. See "Pulse System Requirements" on page 11.

HOW TO INSTALL IIS

IIS provides the server hosting Pulse with web server capabilities and the ASP.NET framework, which is a feature of the .NET Framework. It supports the creation of web pages and web services. *If you are setting up a new web server for Pulse, it is very important that you install IIS before installing the .NET Framework.*

Important: Always make sure that you are installing IIS on the system designated as the Pulse server. If you are setting up a new server, IIS must always be installed before the .NET Framework.

Important: Do not run IIS on a domain controller or a backup domain controller.

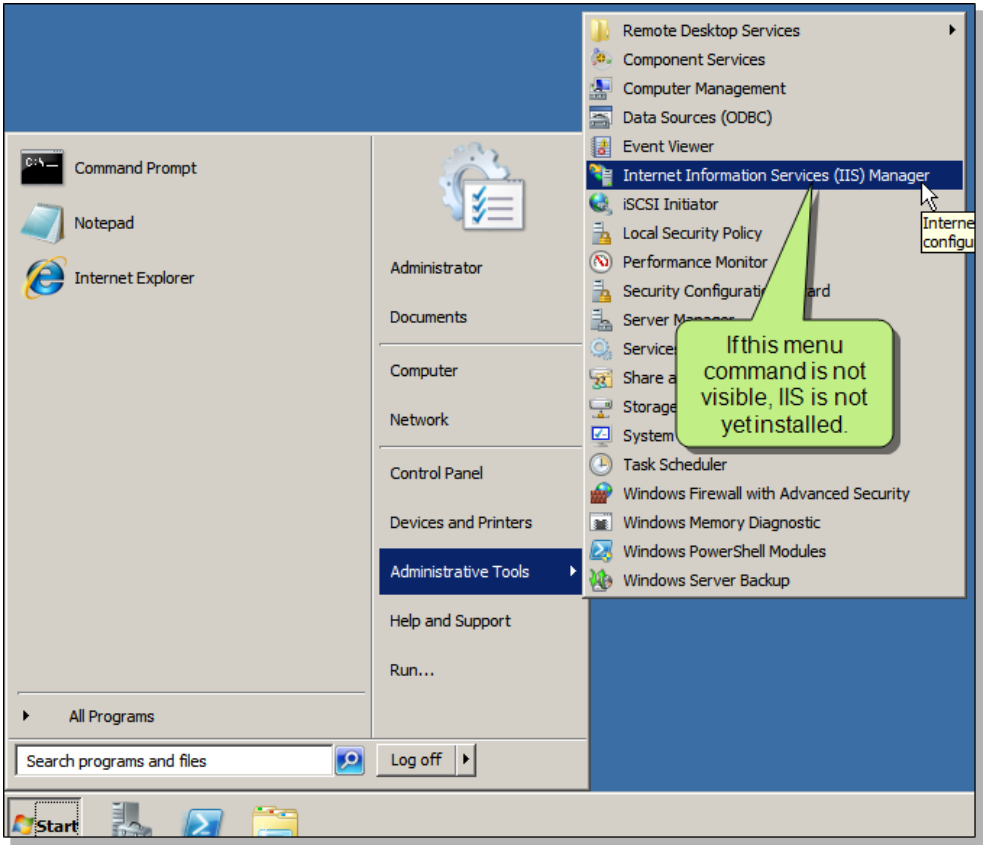
Note: IIS is a built-in component of the Windows OS. For Windows Server 2008 R2, the OS lets you install IIS 7.5. For Windows Server 2008, the OS lets you install IIS 7.0. You can only upgrade the IIS version if you upgrade the OS version.

1. Log in to the system that you selected to be the Pulse web server using one of these accounts:
   - **Built-in Administrator Account for Windows Server** This account has full administrative privileges and is included with the operating system by default. See the person who installed the server's operating system for the user name and password.

     OR
   - **A Local User Account with Administrative Privileges** If available in your environment, you can use a local administrator account for the server. With a local account, the server checks its own files to authenticate the log in and determine if the user has the appropriate administrative rights to install software on the system. This is different from a network domain account.

2. Determine if the appropriate version of IIS is installed on the operating system.

   a. Click **Start>Administrative Tools** and look for the **Internet Information Services (IIS) Manager** menu command.



b. Depending on whether or not the menu command is visible, select the appropriate option:

» **If the Menu Command is Not Visible** You need to install IIS.

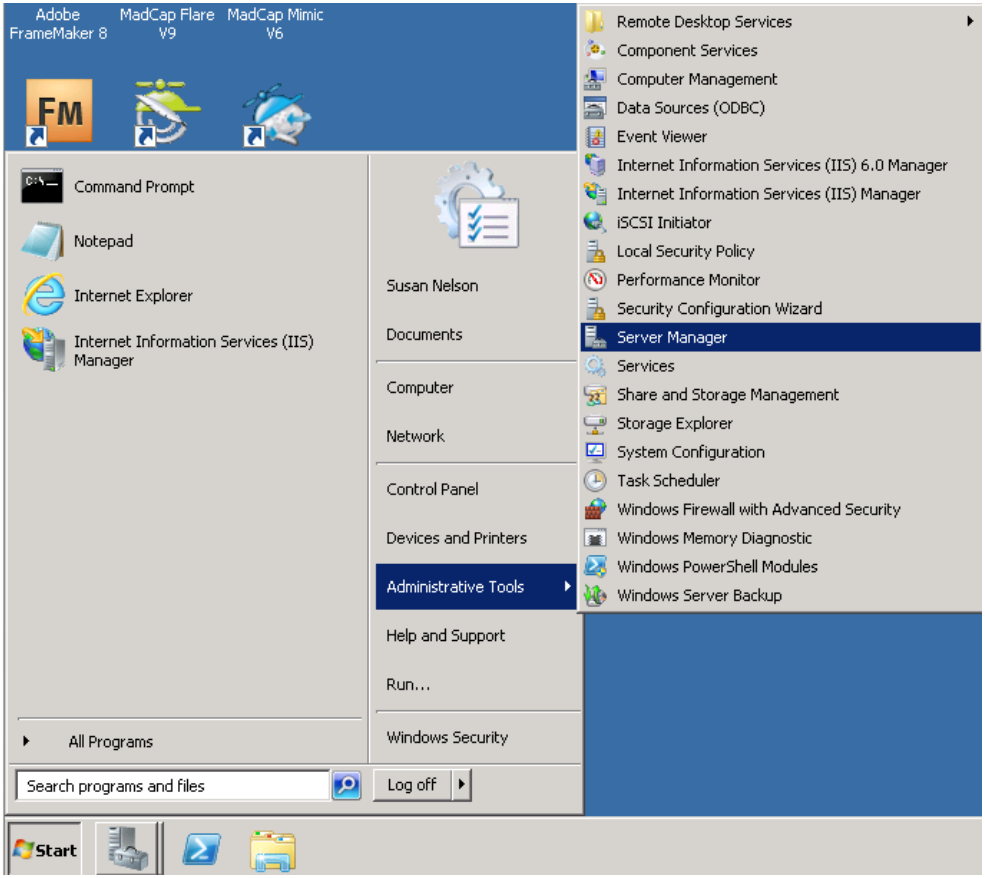
OR

» **If the Menu Command is Visible** Select the menu command to open the IIS Manager window. Then choose **Help>About Internet Information Services** to see the version number.

If IIS is already installed on the server, you can add a new web site in IIS to use with Pulse.

3. If you need to install IIS on the server, add the **Web Server (IIS)** role service:

   a. Click **Start>Administrative Tools** and select **Server Manager** from the context menu.

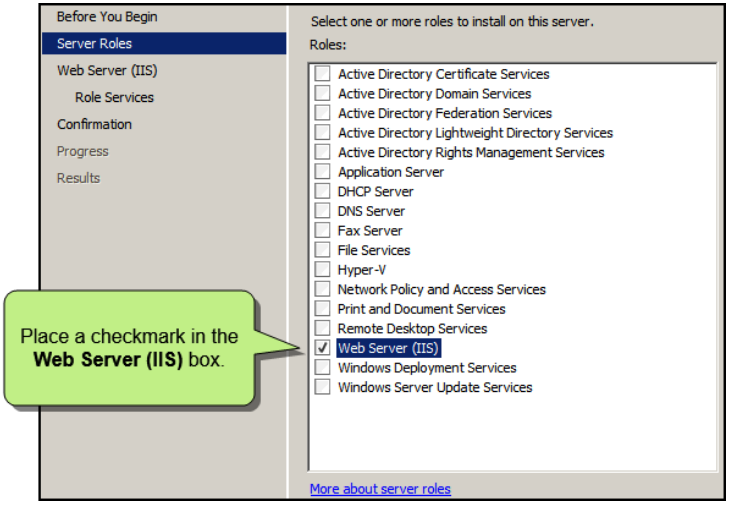


b. In the left-pane under Server Manager, highlight **Roles**. Then in the right-pane under Roles Summary click **Add Roles**.

The Add Roles wizard opens.

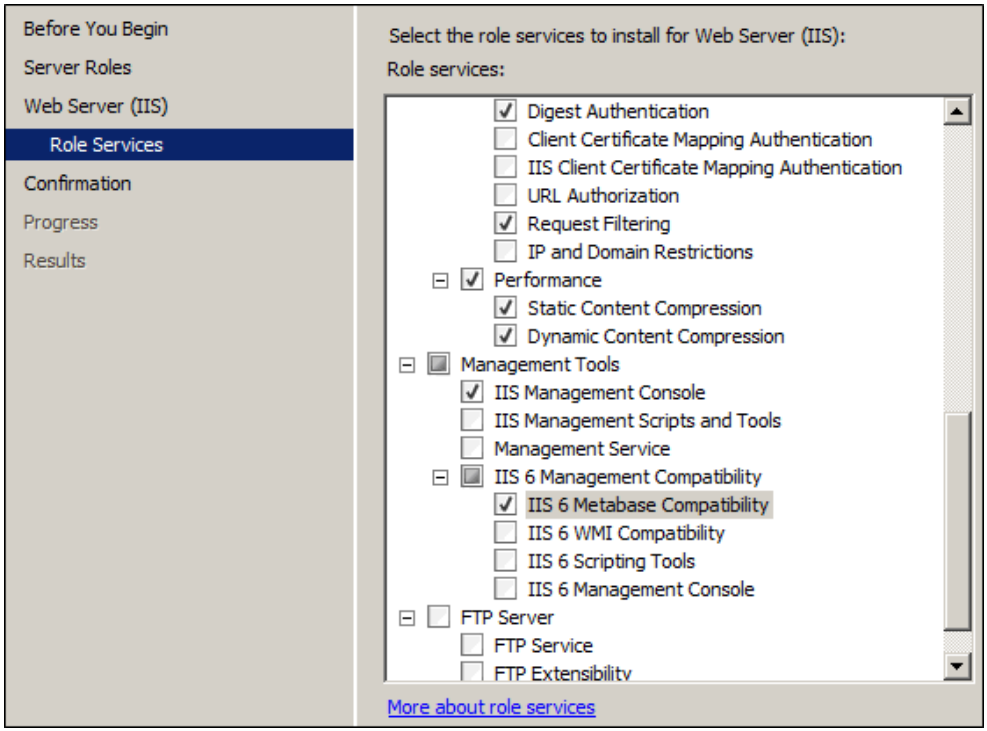
c. In the Before You Begin page, click **Next**.

d. In the Select Server Roles page, place a check mark in the **Web Server (IIS)** box. Then click **Next**.



e. In the Web Server (IIS) page, review the information. Then click **Next**.

f. In the Select Role Services page, place a check mark next to all of the role services in the list below. When finished, click **Next**.



Select the desired services using the recommended role services listed below. *Role services required by* Pulse *are marked with an asterisk (*).*

Role Services Category	Select These Role Service Check Boxes
Common HTTP Features	*Static Content Default Document Directory Browsing HTTP Errors
Application Development	*ASP.NET .NET Extensibility ISAPI Extensions ISAPI Filters
Health and Diagnostics	HTTP Logging Logging Tools Request Monitor Tracing
Security	*Basic Authentication *Windows Authentication Digest Authentication Request Filtering
Performance	Static Content Compression Dynamic Content Compression
Management Tools	IIS Management Console
IIS 6 Management Compatibility	*IIS 6 Metabase Compatibility

g. In the Confirm Installation Selections page, click **Install**. A progress indicator shows you the status.

h. After the "Installation Succeeded" message appears, click **Close** in the Installation Results page.

i. Click **Close** to quit the Add Roles Wizard.

HOW TO INSTALL THE .NET FRAMEWORK 3.5.1 AND 4.0

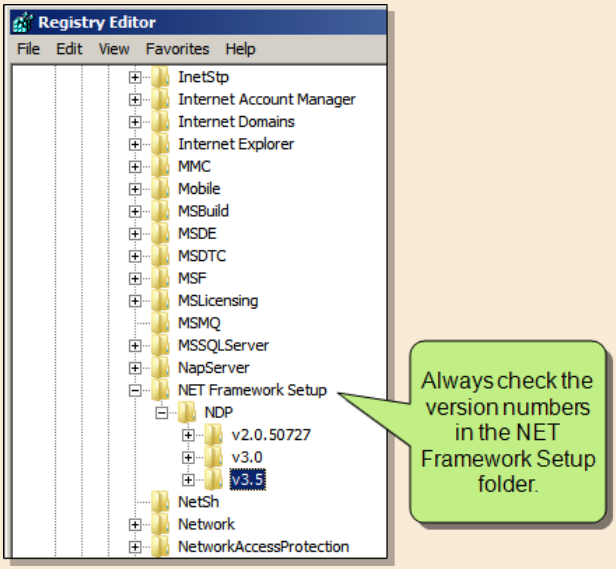
Following are steps for installing the .NET framework:

HOW TO DETERMINE THE .NET FRAMEWORK VERSIONS

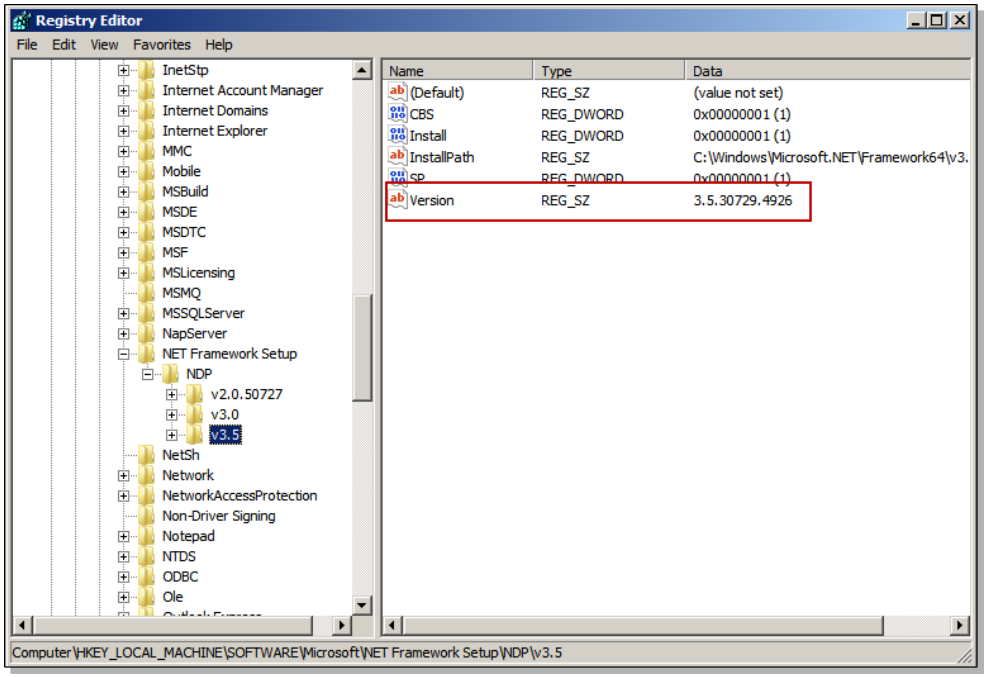
Before installing .NET Framework, determine if the server is running the .NET Framework 3.5 Service Pack 1 *and* 4.0.

1. In the Windows Start menu, type `Run` in the **Search Programs and Files** box. Then select **Run** from the Program menu to open the Run dialog.
2. In the Open box, type `regedit.exe`. Then, press **Enter** or click **OK**.
3. If you are prompted by the following User Account Control message. Click **Yes** to open the Registry Editor.
4. In the Registry Editor, the following registry keys will be visible if the required versions are installed:

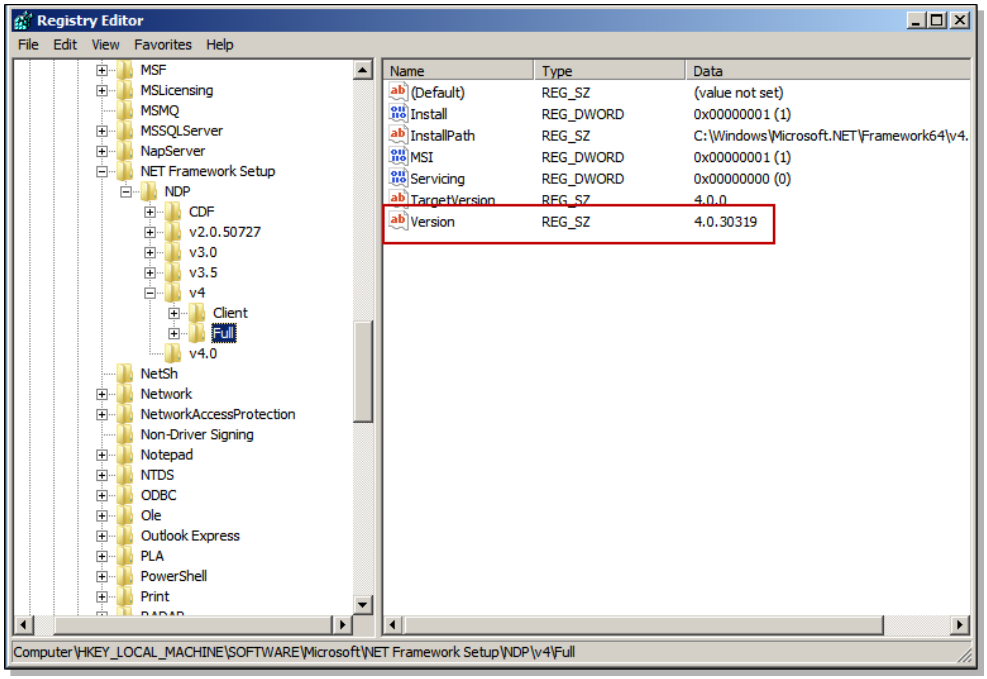
Important: When checking the information below, always make sure you are verifying the version numbers in the in "NET Framework Setup" directory and *not* the ".NET Framework" directory.



» **For Version 3.5.1 (Required by SQL Server)** HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v3.5



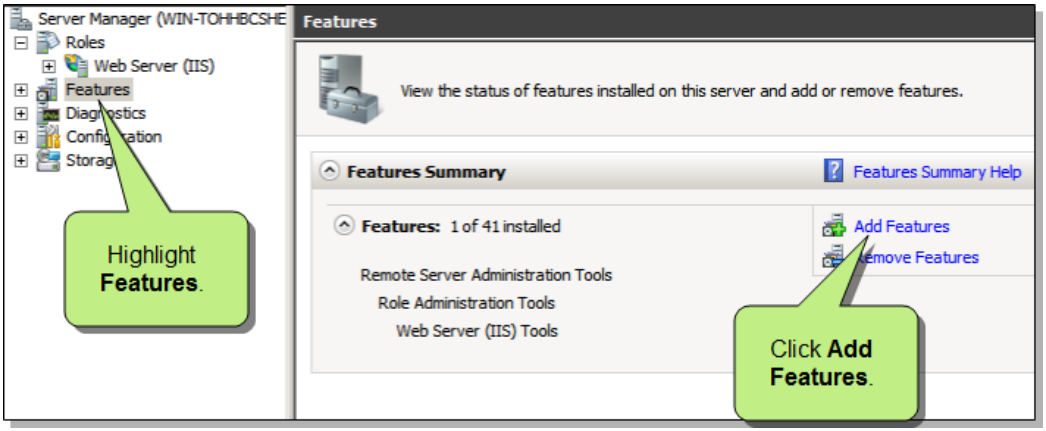
» **For Version 4.0 (Required by the Pulse Setup Program)** HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v4\Full



HOW TO INSTALL .NET 3.5.1 ON WINDOWS SERVER 2008 R2

The Windows Server 2008 R2 operating system includes the .NET Framework 3.5 Service Pack 1 service, you simply need to enable it as follows:

1. Click **Start>Administrative Tools** and select **Server Manager**.
2. Under **Server Manager**, highlight **Features**. Then under **Features Summary**, click **Add Features**.



3. In the Select Features page, place a check mark next to the **.NET Framework 3.5.1 Features** box.
4. When prompted to add features required, click **Add Required Features**.
5. Make sure the **.NET Framework 3.5.1 Features** box is selected. Then click **Next**.
6. In the Confirm Installation Selections dialog, review any informational messages. When ready, click **Install**. A progress indicator shows you the status of the installation.
7. In the Installation Results page, look for the "Installation succeeded" messages. Then click **Close**.
8. Choose **File>Exit** to quit the Server Manager.

HOW TO INSTALL .NET 3.5.1 ON WINDOWS SERVER 2008

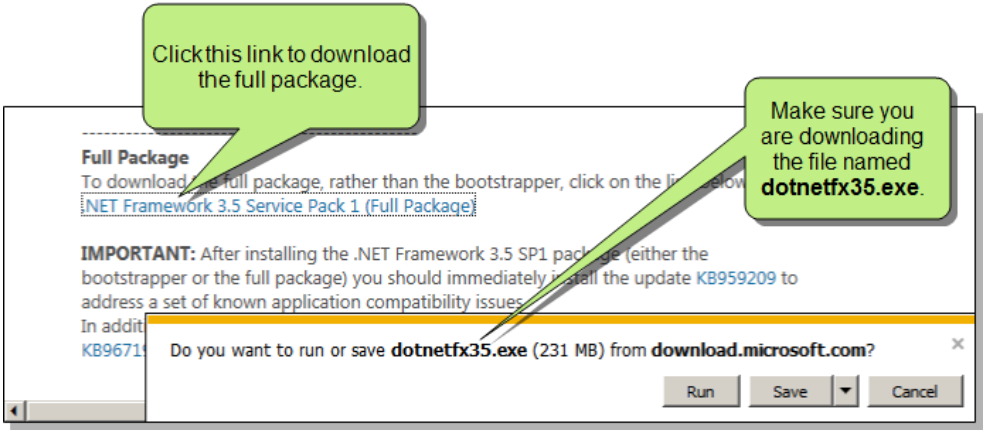
The Windows Server 2008 operating system does not include the .NET Framework 3.5 Service Pack 1, so you will typically need to download and install it manually using these steps:

1. Download the installation package:
   a. Visit the Microsoft Download Center at:

      http://www.microsoft.com/en-us/download/details.aspx?id=22

   b. Scroll down the page and click **Install Instructions**. It is recommended that you read the instructions before proceeding.

   c. Under **Full Package**, click the **Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)** download link. *Always make sure you download the Full Package. This is the file named "dotnetfx35.exe."*



2. After the download completes, run the setup program as an administrator.
3. In the .NET Framework 3.5.1 Setup page, place a check mark in the **I have read and accept the license terms** box. Then click **Install**.

   A progress indicator shows you the status.

4. At the Installation Is Complete page, click **Finish**.

   If you are installing the .NET Framework 3.5.1 on Windows 2008, Microsoft also recommends installing the following updates to address known issues:

   - http://support.microsoft.com/kb/959209
   - http://www.microsoft.com/en-us/download/details.aspx?id=22288

HOW TO INSTALL .NET FRAMEWORK 4.0

The .NET Framework 4.0 is not included with Windows Server 2008 R2 or Windows Server 2008. You must download and manually install it on the server that will be hosting the Pulse server application, as it is required by the Pulse setup program.

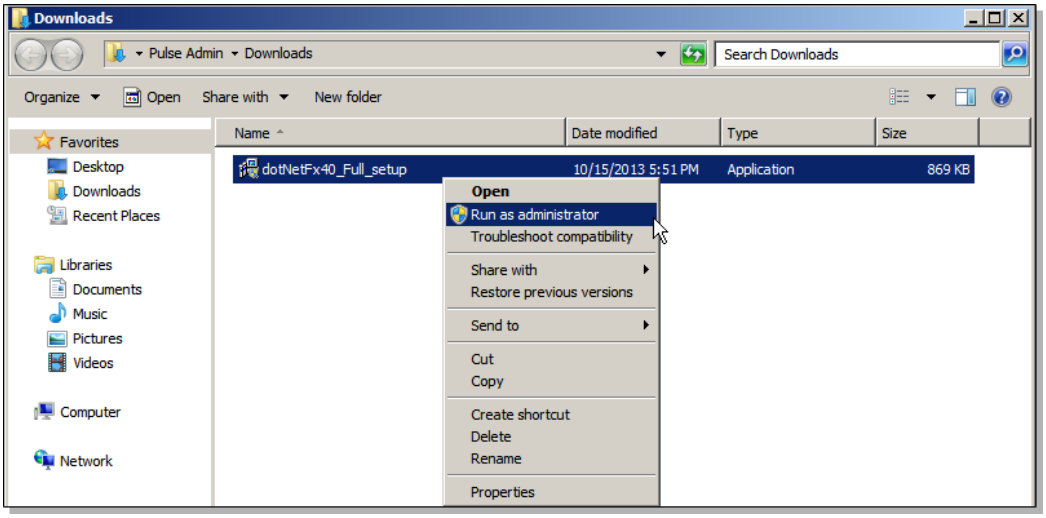
1. Downland the installation package:
   a. Visit the Microsoft Download Center at:

      http://www.microsoft.com/en-us/download/details.aspx?id=17851

   b. Scroll down the page and click **Install Instructions**. It is recommended that you read the instructions before proceeding.

   c. Click the **Download** button. Always make sure you download the Full Package. This is the file named "dotNetFx40_Full_setup.exe."

2. After the download completes, run the setup program as an administrator. This is the file named "dotNetFx40_Full_setup.exe."



3. If prompted by the following User Account Control message, click **Yes**.
4. In the .NET Framework 4 Setup page, place a check mark in the **I have read and accept the license terms** box. Then click **Install**. A progress indicator shows you the status.
5. At the Installation Is Complete page, click **Finish**.

HOW TO INSTALL WINDOWS INSTALLER 4.5

Depending on the operating system and version of SQL Server you plan to run on the server hosting the Pulse database, you may need to set up Windows Installer:

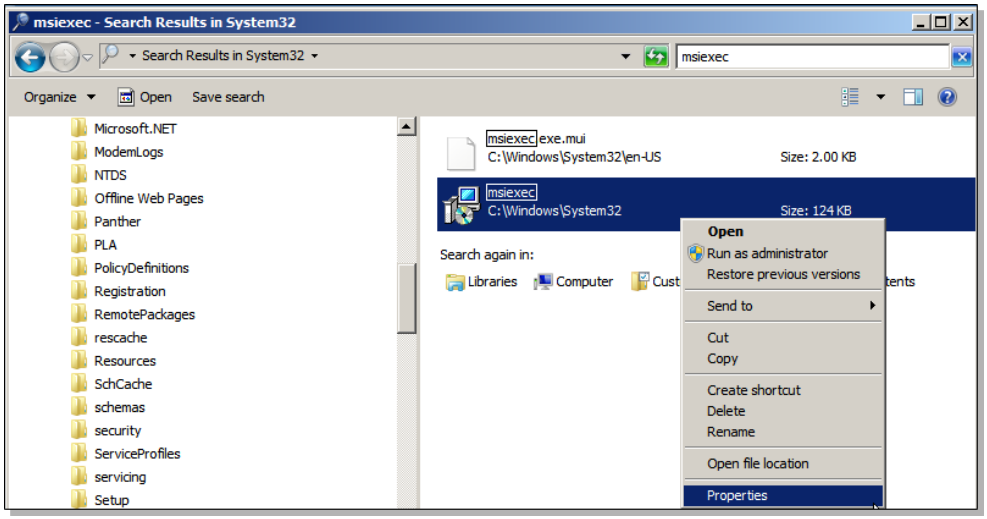
- **If the Server Hosting the Database is Running Windows Server 2008 R2** You do not need to set up Windows Installer 4.5. This version of the operating system already includes Windows Installer 5.0, which is compatible.
- **If the Server Hosting the Database is Running Windows Server 2008** If the server is running Windows Server 2008 *and* if you plan to install Microsoft SQL Server 2008 R2 (Express Edition with Advanced Services), you must download and install the Windows Installer 4.5 Redistributable. Other supported editions of SQL Server do *not* have this requirement.

1. Determine which version of Windows Installer is running on the server that will host your Pulse database:

   a. In Windows Explorer, navigate to the System32 folder. Typically, the path is: C:\Windows\System32.

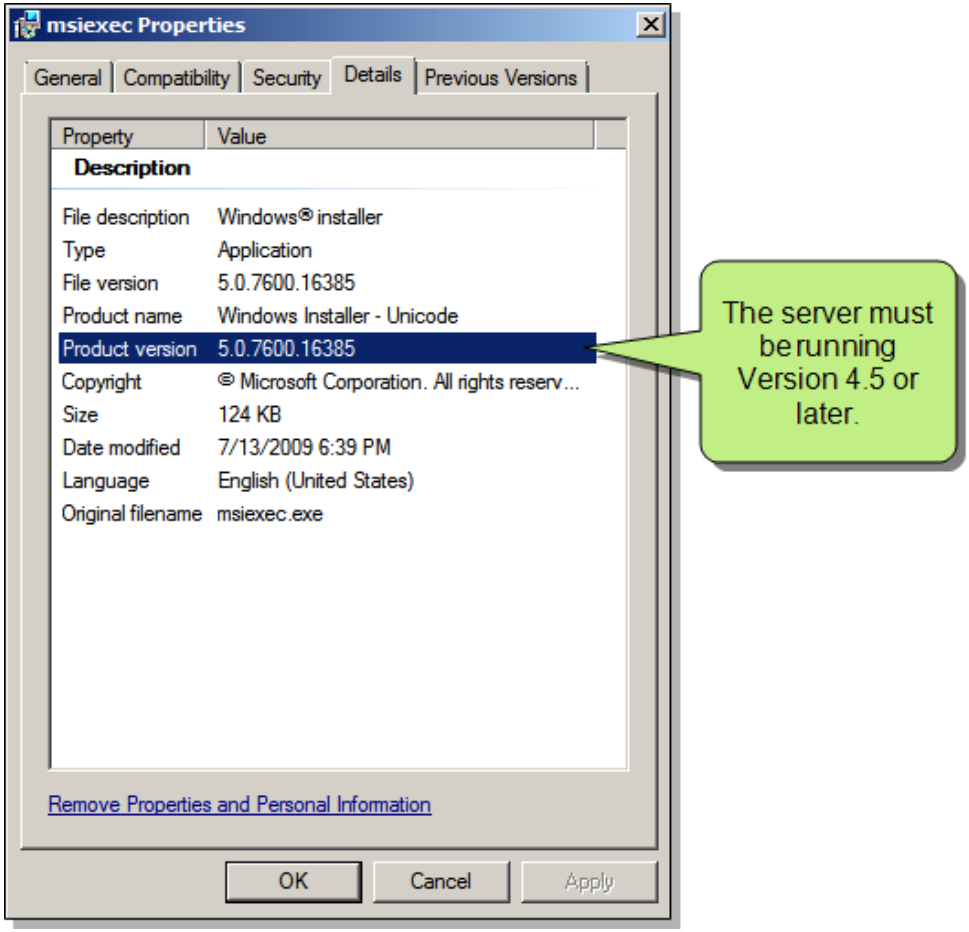
   b. In the Windows Explorer search field, look for the file named "msiexec.exe."

   c. Right-click the file and select **Properties** from the context menu.



   d. In the Properties dialog, click the **Details** tab.

e. In the field next to **Product Version**, ensure that your system is running Version 4.5 or higher.



f. Click **OK** to close the Properties dialog.

2. Visit the Microsoft Download Center to get a copy of the installation package.

    a. Visit the Microsoft Download Center at:

    http://www.microsoft.com/en-us/download/details.aspx?id=8483

    b. Scroll down the page and click **Install Instructions**. It is recommended that you read the instructions before proceeding.

    c. Click the **Download** button.

    d. In the Choose the Download You Want page, place a check mark next to the appropriate box:

    - **x86 Platform** Windows6.0-KB942288-v2-x86.msu
    - **x64 Platform** Windows6.0-KB942288-v2-x64.msu
    - **IS64 Platform** Windows6.0-KB942288-v2-ioa64.msu

3. Run the installation package that is appropriate for your platform.

MICROSOFT VISUAL C++ 2010 REDISTRIBUTABLE

The Pulse setup program requires the web server to be running the Microsoft Visual C++ 2010 Redistributable or a newer version.

This prerequisite is automatically installed when you run the Pulse setup program. The setup program automatically checks your system for a compatible version. If a compatible version is detected, you can quit the system check. If a compatible version is not detected, you will be prompted to download and install it. See "Installing and Activating Pulse" on page 78.

Important: Software vendors commonly redistribute different versions of Visual C++ with their programs. If your system is running more that one version of Visual C++, you do not want to delete or uninstall any version from your system as doing so can render any linked software programs inoperable.

WINDOWS POWERSHELL 1.0

If you plan to use Microsoft SQL Server 2008 R2 (Express Edition with Advanced Services) for the Pulse database, the operating system will determine whether or not you need to install Windows PowerShell 1.0.

- **On Windows Server 2008 R2** Windows PowerShell 2.0 is included with the operating system. You do not need to install version 1.0.
- **On Windows Server 2008** Windows PowerShell 2.0 can be added via the operating system. You will use the Server Manager to add this feature.

1. On systems running Windows Server 2008, log in to the server as an administrator.
2. Click **Start>Administrative Tools** and select **Server Manager** from the context menu.
3. Under **Server Manager**, highlight **Features**. The Add Features Wizard opens.
4. In the Features Summary page, click **Add Features**.
5. In the Select Features page, place a check mark next to the **Windows PowerShell** box.

   Note: If the Windows PowerShell box is grayed out and unavailable, a message will indicate that PowerShell is already installed.

6. In the Select Features box, click **Next**.
7. In the Confirmation box, review any informational messages. When ready, click **Install**. A progress indicator shows you the status of the installation.
8. In the Installation Results page, look for the Installation Succeeded message. Then click **Close**.

Installing Microsoft SQL Server

Information for Network Administrators

You can install a Microsoft SQL Server instance to use as the Pulse database. This instance can reside on the Pulse web server (this is the server running IIS) or on a different system with access to the Pulse web server.

Before You Begin

To begin the installation, log in to the server where you will be installing the SQL database instance. You must use the appropriate access credentials:

- **Built-In Administrator Account for Windows Server** This is the account that lets you run programs as an administrator, before a user account is created.

  OR

- **Windows User Account with Local Administrator Privileges** This account must have local administrator privileges for the server.

Installing SQL Server

You must install a supported version of Microsoft SQL Server.

HOW TO INSTALL SQL SERVER 2008 R2

It is recommended that you apply all available service packs and critical updates to your operating system prior to the installation.

1. Obtain the installation media.
2. Log in to the server as an administrator.
3. Run the setup program from a CD or the network.

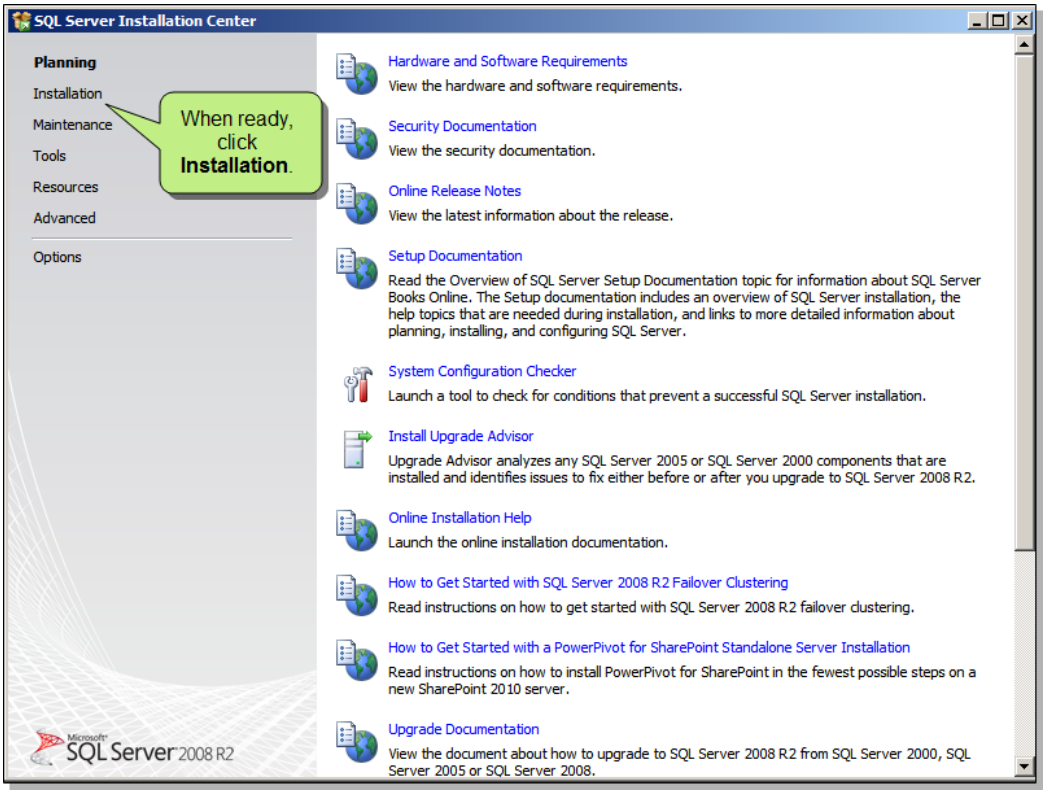
   IF YOU ARE INSTALLING FROM A NETWORK

   If the Do You Want to Run This File dialog appears, click **Run**.

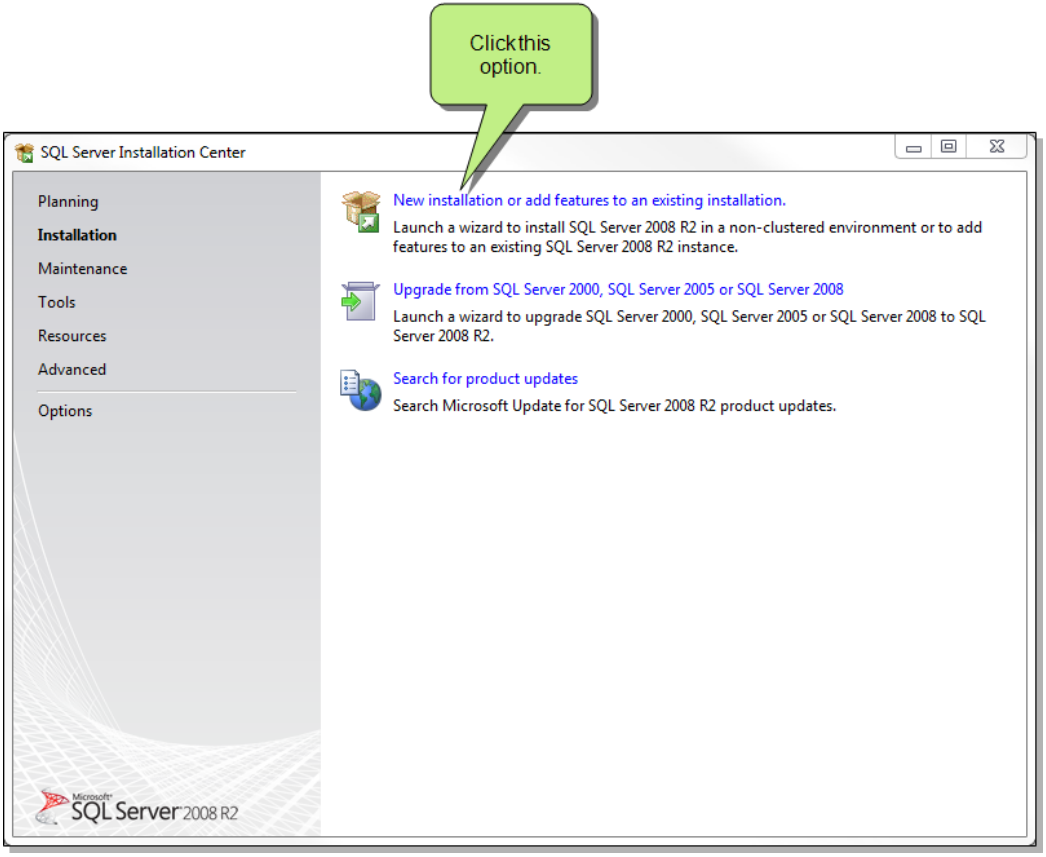
   If prompted by Windows User Account Control message asking if you want to allow the program to make changes to this computer, click **Yes**.

   Depending on your specific environment, you may also be prompted for access credentials to access the setup program on your network share.

4. In the Planning page of the Installation Center, review the information. When ready to proceed, click **Installation** in the left pane.



5. In the Installation page, click the **New installation or add features to an existing installation** option.



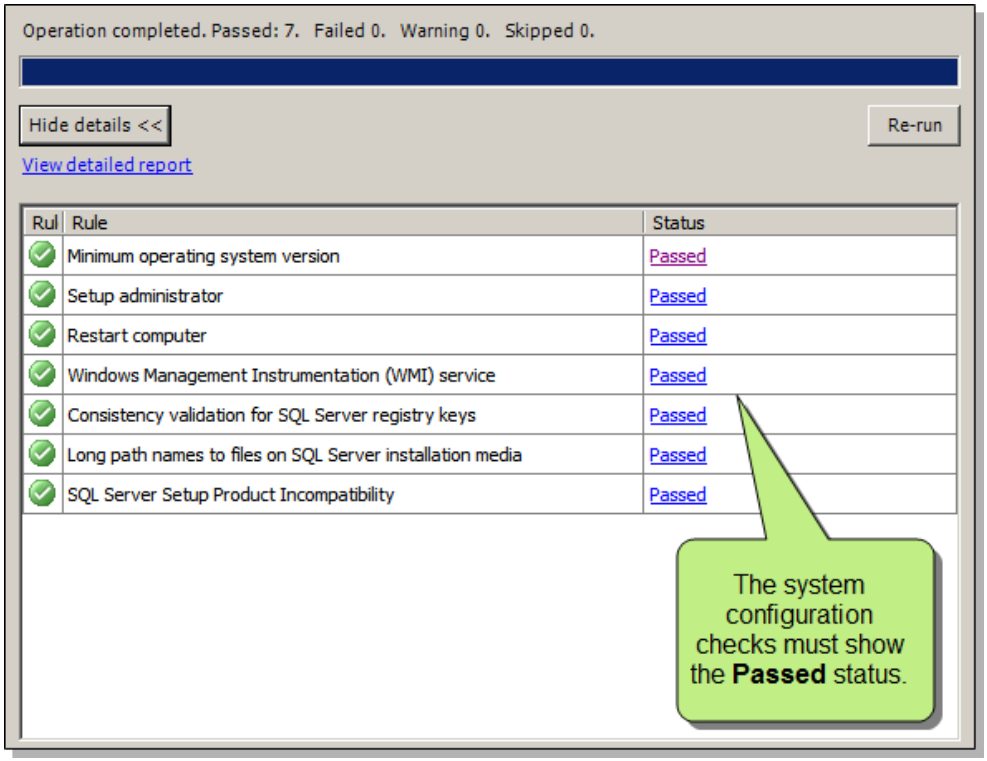
The SQL Server 2008 R2 Setup wizard checks the system to detect potential issues.

6. In the Setup Support Rules dialog, do one of the following:

   - If the wizard finds any failed, warning, or skipped rules, click **Show Details** and/or click **View detailed report**. Any failures must be resolved before proceeding. When resolved, click **Re-run** to perform another system check.

     OR

   - If wizard determines that the system passes the system check, click **OK**.

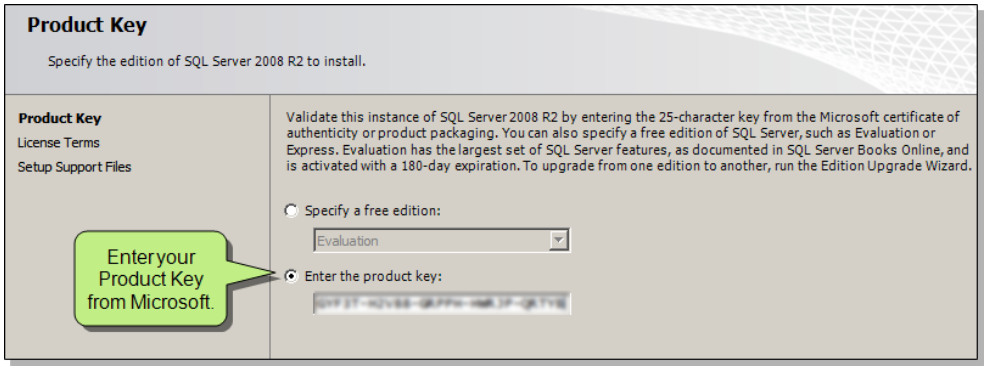


The SQL Server 2008 R2 wizard ensures that you have a valid product key.

7. In the Product Key page, validate the SQL Server 2008 R2 instance:

   a. In the Product Key page, select the **Enter the product key** option.

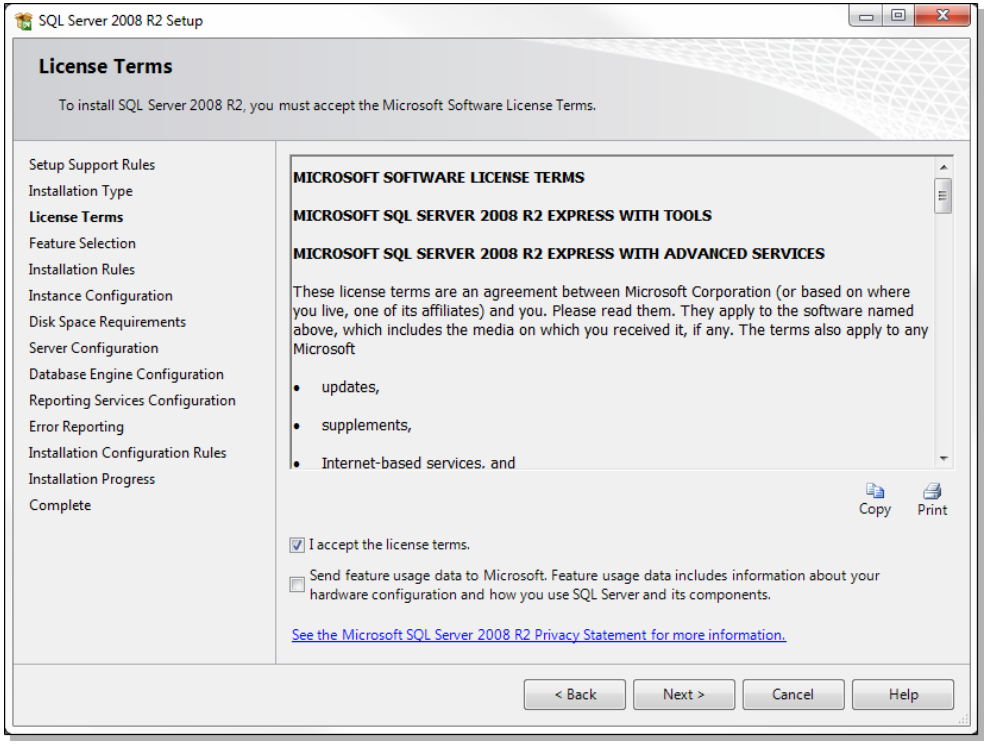
   b. Type your Microsoft license key in the box.



   c. Click **Next** to open the License Terms page.

   d. Place a check mark in the **I accept the license terms** box.

e. (Optional) If you wish to send feature usage data, select the check box at the bottom of the dialog.

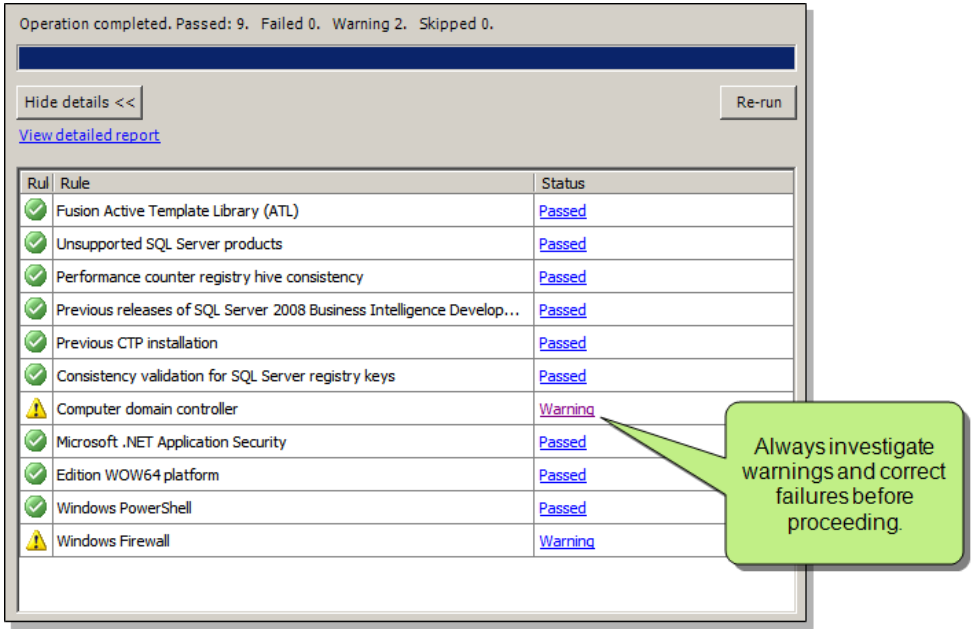


f. Click **Next** to open the Setup Support Files page.

g. In the Setup Support Files page, click **Install**. The setup program performs a system check to detect potential issues.

8. In the Setup Support Rules page, do one of the following:

   » If potential issues are found, click **Show Details**. You can also click **View detailed report** for more information. Issues must be resolved before proceeding. When resolved, click **Re-run** to perform another check.



   OR

   » If the Setup Support Rules indicates the system has passed, click **Next**.

   The Setup Role page appears.

9. In the Setup Role page, choose the appropriate installation type. Then click **Next** to proceed.

   HOW TO CHOOSE AN INSTALLATION TYPE

   If you are not familiar with SQL Server, it is recommend that you choose the following:

   a. Select the **SQL Server Feature Installation**. This lets you choose the features to install.
   b. Click **Next** to open the Feature Selection page.

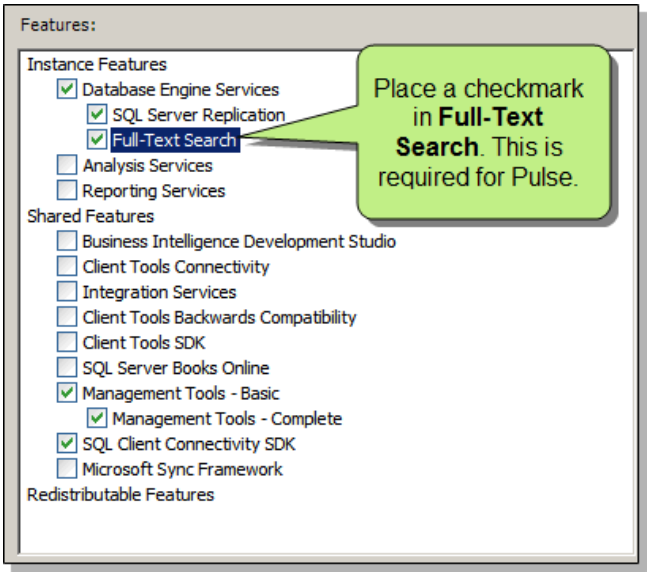
10. In the Feature Selection page, place check marks next to the desired features. Then click **Next**.

HOW TO INSTALL THE MINIMUM REQUIRED FEATURES

At a minimum, you should:

a. Select these check boxes:

- **Database Engine Services**
  - **SQL Server Replication**
  - **Full-Text Search**
- **Management Tools - Basic**
  - **Management Tools - Complete**
- **SQL Client Connectivity SDK**



b. Use the default shared feature directory.

c. Click **Next**.

The setup program checks the system for potential issues.

11. In the Installation Rules page, do one of the following:

» If any issues are found, click **Show Details**. You can also click **View detailed report** for more information. Issues must be resolved before proceeding. When resolved, click **Re-run** to perform another check.

OR

» If all of the system configuration checks have passed, click **Next**.

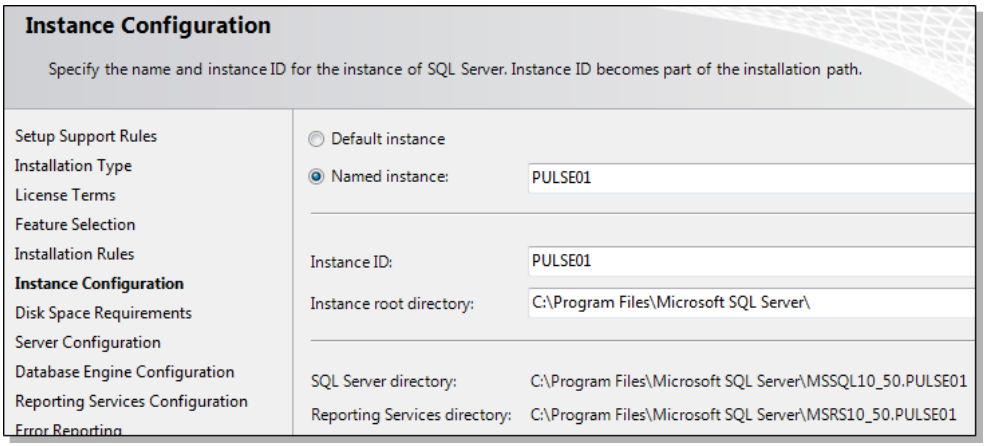
The Instance Configuration page opens.

12. In the Instance Configuration page, select one of these buttons:

» **Default instance** If this is the first time SQL Server instance being installed on the system, use the default instance name. This is typically MSSQLSERVER.

OR

» **Named instance** If you do not want to use the default instance, select this button type a unique name in the **Instance ID** box. For example, type `PULSE01`.



13. Click **Next** to open the Disk Space Requirements page and then:

    - If your system does not meet the disk space requirements, review the Disk Usage Summary and address any issues before proceeding.

      OR

    - If your system meets the disk space requirements, click **Next**.

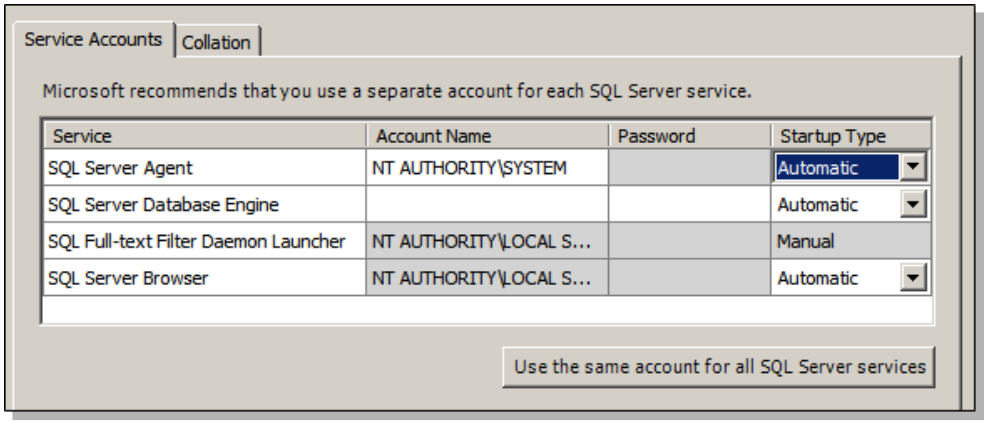
14. In the Server Configuration page, under the **Service Accounts** tab you must provision service accounts to each listed SQL service. When finished, click **Next**.

    HOW TO PROVISION SQL SERVICE ACCOUNTS

    Important: Always contact your SQL Server Administrator and/or Windows Administrator for the appropriate service accounts to use in your environment.

    a. Provision the appropriate accounts to the list of SQL services.

    b. Make sure the **Startup Type** for each service is set as follows:



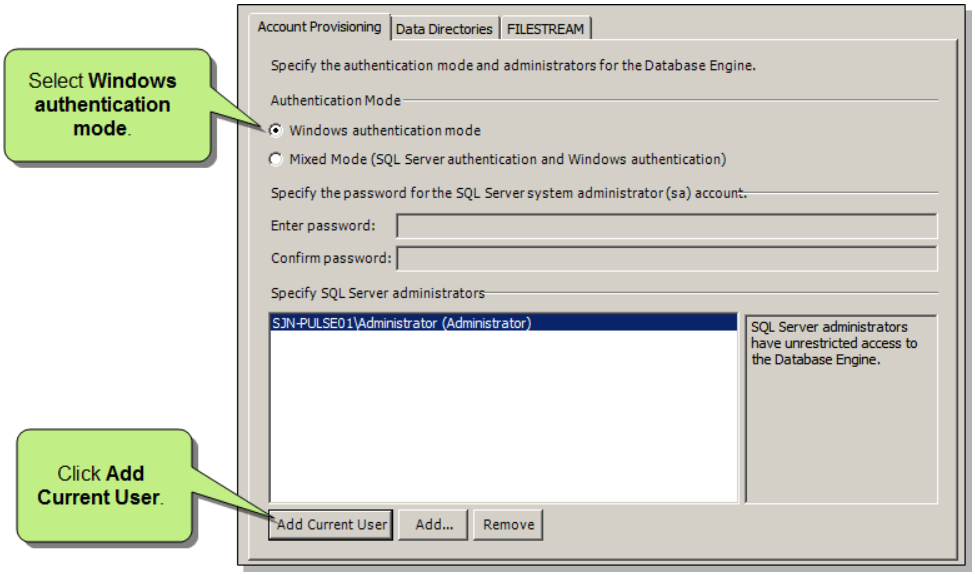
Service	Account Name/Password	Startup Type
SQL Server Agent	There is no default account for this service. The account you use depends on your security requirements.	Automatic

Service	Account Name/Password	Startup Type
SQL Server Database Engine	This account defaults to NT AUTHORITY\SYSTEM. The account you use depends on your security requirements.	Automatic
SQL Full-text Filter Daemon Launcher	This account defaults to NT AUTHORITY\LOCAL SERVICE. The account you use depends on your security requirements. Microsoft recommends using a low privilege account.	Manual
SQL Server Browser	The default logon account is NT AUTHORITY\LOCAL SERVICE. You will typically keep this setting.	Automatic

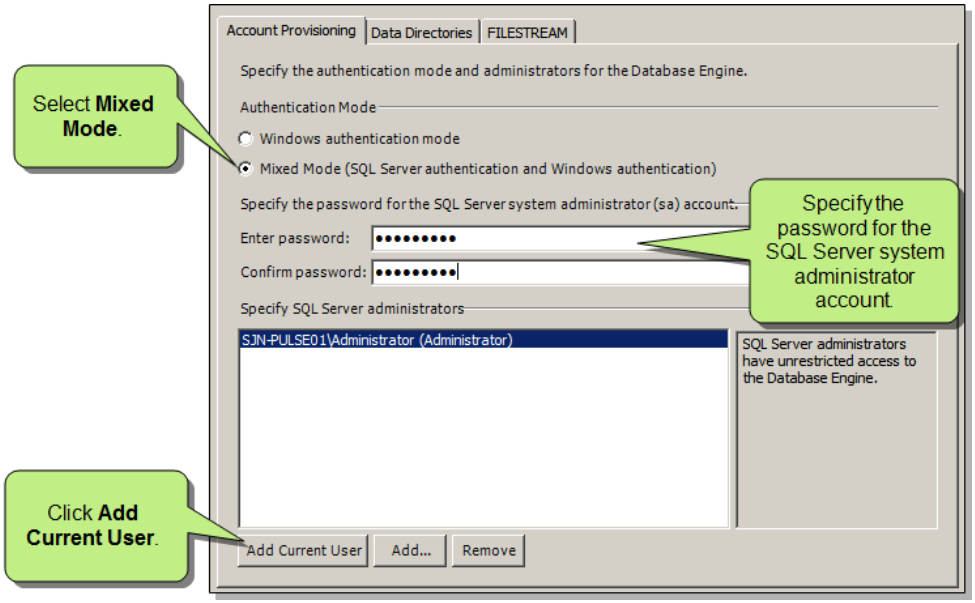
c. Click **Next** to proceed. The Database Engine Configuration page opens.

15. In the Database Engine Configuration page, under the **Account Provisioning** tab, choose one of these options:

   - **Windows authentication mode** If you choose this option and are not logged in as an administrator, it is recommended that you add an account that has sufficient permissions to perform all of the needed SQL administrative tasks. If you are logged in as an administrator, it is recommended you also click **Add Current User**.



» **Mixed Mode (SQL Server authentication and Windows authentication)** If you choose this option, you must specify the password to use for the SQL Server system administrator account.



When finished, click **Next**.

16. In the Error Reporting page, select whether or not you want to send error reports to Microsoft. This is your preference. Then click **Next**.
17. In the Installation Configuration Rules page, do the following:
    - If there are issues, you must address them before clicking **Next**.

      OR
    - If there are no issues, click **Next**.
18. In the Ready to Install page, click **Install**. A progress indicator shows you the status of the process.
19. When the installation is complete, you will see the "Installation Succeeded" message. Click **Close**.

Note: If a failure occurs, troubleshooting information may be available on the MadCap Software knowledge base at: http://kb.madcapsoftware.com/

Note: You may also want to check with your SQL Server Administrator.

HOW TO INSTALL SQL SERVER 2008

It is recommended that you apply all available service packs and critical updates to your operating system prior to the installation.

1. Obtain the installation media.
2. Log in to the server as an administrator.
3. Run the setup program from a CD or a network.

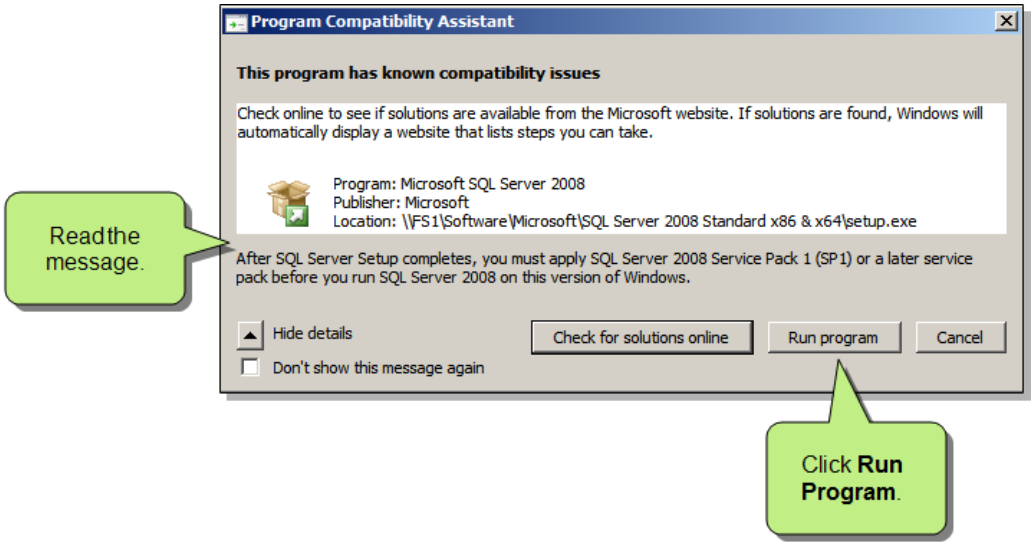
   IF YOU ARE INSTALLING FROM A NETWORK

   If the Do You Want to Run This File dialog appears, click **Run**.

   If prompted by Windows User Account Control message asking if you want to allow the program to make changes to this computer, click **Yes**.

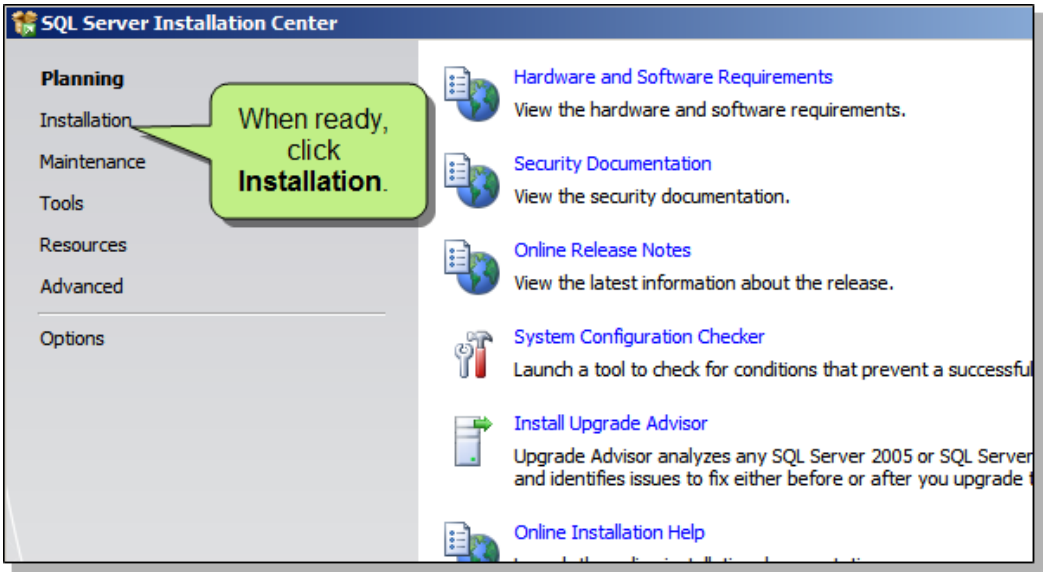
   Depending on your specific environment, you may also be prompted for access credentials to access the setup program on your network share.

4. If you are performing the installation on a system Windows Server 2008 R2, the Program Compatibility Assistant appears. Read the message and then click **Run Program**.



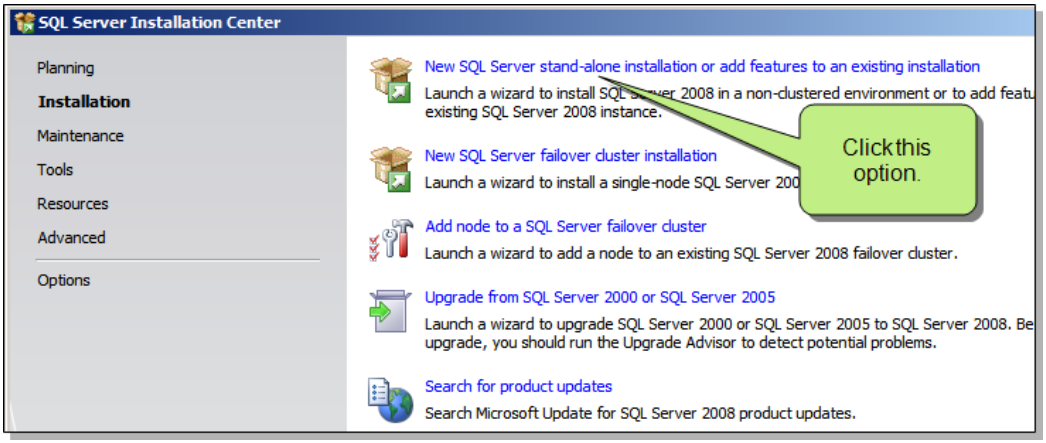
Important: If you are installing SQL Server 2008 on a Windows Server 2008 R2 system, you need to apply SQL Server 2008 Service Pack 1 (SP1) or later after the initial SQL installation. Updating to Service Pack 3 is recommended, as it contains all of the updates released in Service Pack 1 and 2.

5. In the Planning page of the Installation Center, review the information. When ready to proceed, click **Installation** in the left pane.



6. In the Installation page, click **New SQL Server stand-alone installation or add features to an existing installation**.

   The SQL Server 2008 Setup wizard performs a system check operation to detect any potential issues.



   - If the Open File - Security Warning message appears, click **Run**.
   - If the Program Compatibility Assistant dialog appears, click **Run Program**.

7. In the Setup Support Rules dialog, do one of the following:

   - If any failed, warning or skipped rules are listed, click **Show Details**. This lets you view potential issues. You can also click **View detailed report** for more information. Any failed rules must be resolved before proceeding. When corrected, click **Re-run** to perform another system check.

     OR

   - If the Setup Support Rules indicates that all of the system checks have passed, click **OK**.

   The SQL Server 2008 Setup continues. The setup program checks to ensure that you have a valid product key.

8. In the Product Key page, you must validate the instance of SQL Server 2008 that you are installing:

    a. In the Product Key page, select the **Enter the product key** option.
    b. Type your Microsoft license key in the box.
    c. Click **Next** to open the License terms page.
    d. Place a check mark in the **I accept the license terms** box.
    e. Click **Next** to open the Setup Support Files page.
    f. In the Setup Support Files page, click **Install** to proceed. The Setup Support Rules page opens, and the setup program begins performing a system check operation to find out if any additional problems may occur when you install SQL.

9. In the Setup Support Rules page, do one of the following:

    - If any issues are found, click **Show Details**. This lets you view which rules have passed, failed, or have warnings. You can also click **View detailed report** to get more information. Any issues must be resolved before proceeding with the installation. Then click **Re-run** to perform another configuration check.

      OR

    - If the Setup Support Rules indicates that all of the system configuration checks have passed, click **Next**.

    The Feature Selection page opens.

10. In the Feature Selection page, ensure that you have placed check marks in the boxes for the features you want to install and click **Next** to proceed.

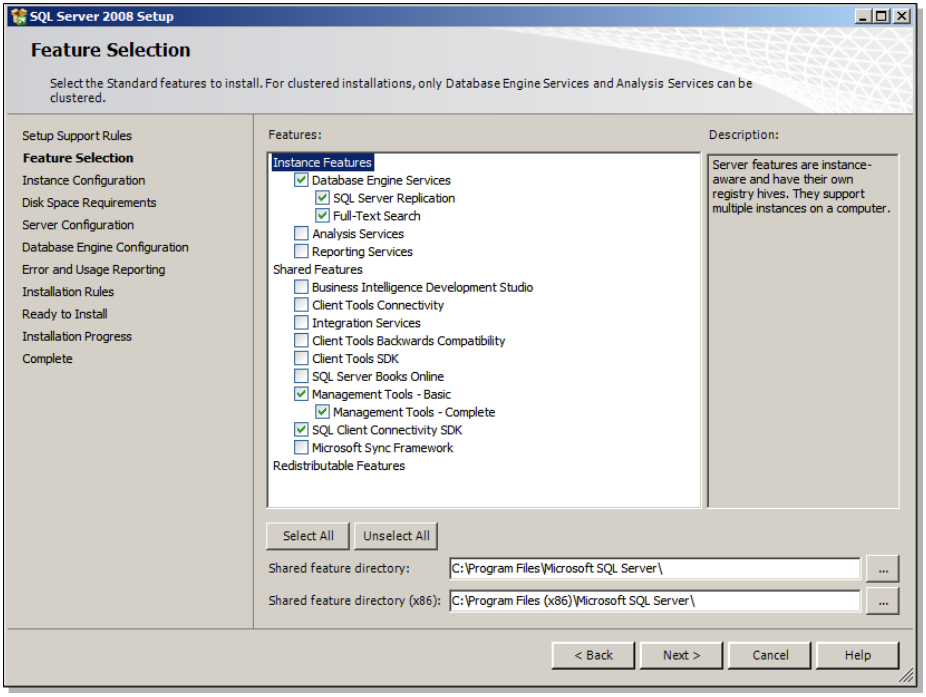
    HOW TO INSTALL THE MINIMUM REQUIRED FEATURES

    At a minimum, you should:

    a. Select these check boxes:

        - **Database Engine Services**
            - **SQL Server Replication**
            - **Full-Text Search**
        - **Management Tools - Basic**
            - **Management Tools - Complete**

» SQL Client Connectivity SDK

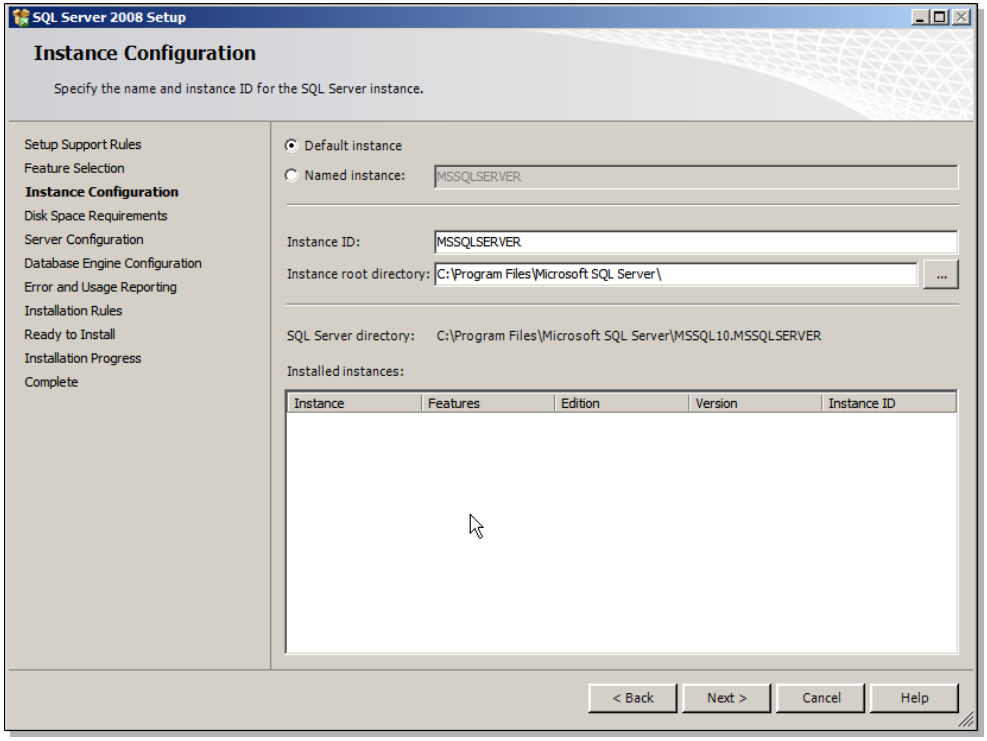


b. Use the default shared feature directory.

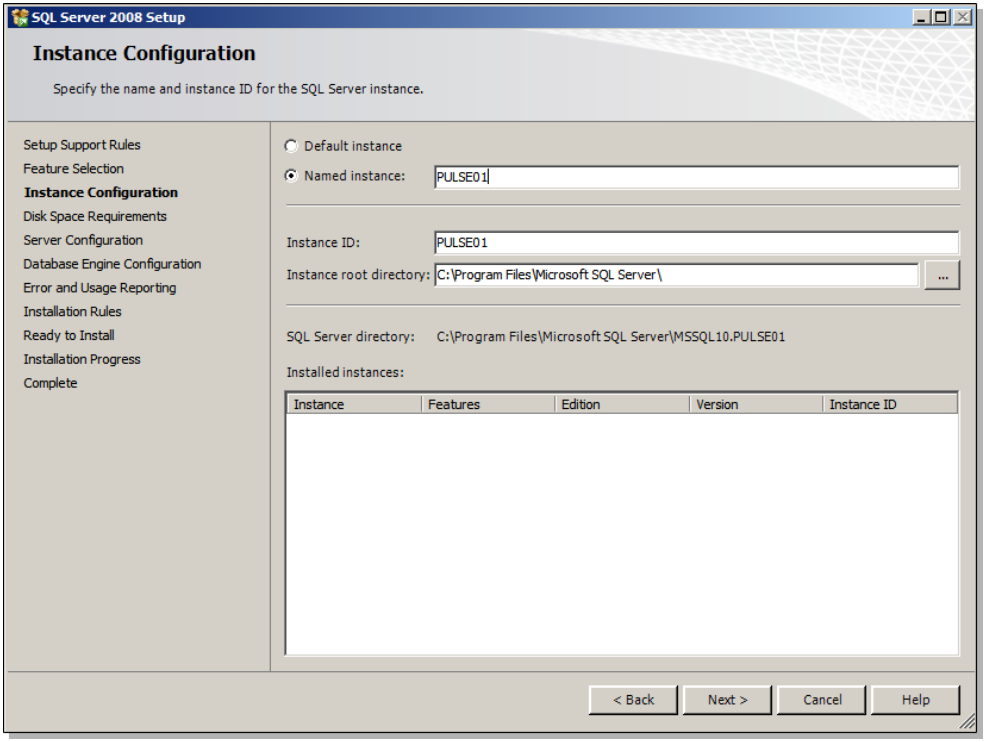
c. Click **Next** to proceed. The setup program determines if there are any issues on the system that may prevent the installation process from running.

11. In the Instance Configuration page, select one of these options:

» **Default instance** If this is the first time SQL Server is being installed on the system, use the default instance name which is MSSQLSERVER.



» **Named instance** If this is not the first installation of SQL Server on the system or if you do not wish to use the default instance, select this option to create a named instance. Then, enter the desired name in the **Instance ID** box. For example, type `PULSE01`.



12. Click **Next** to open the Disk Space Requirements page and then:

    » If your system does not meet the disk space requirements, review the Disk Usage Summary and address any issues before clicking **Next**.

    OR

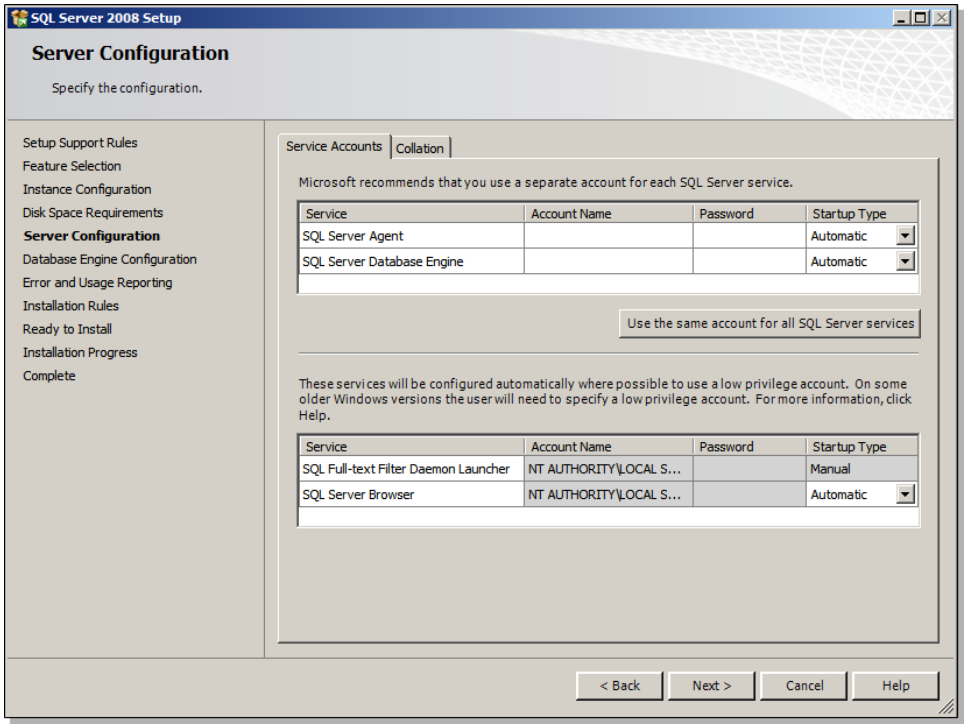
    » If your system meets the disk space requirements, click **Next**.

13. In the Server Configuration page, under the **Service Accounts** tab, provision service accounts to each listed SQL service. When finished, click **Next**.

HOW TO PROVISION SQL SERVICE ACCOUNTS

> **Important:** Always contact your SQL Server Administrator and/or Windows Administrator for the appropriate service accounts to use in your environment. See this article on Microsoft Tech Net for more information: http://technet.microsoft.com/en-us/library/cc281953(v=sql.120).aspx

a. Provision the appropriate accounts to the list of SQL services and make sure the **Startup Type** for the SQL services is set as defined in the table below:



Service	Account Name/Password	Startup Type
SQL Server Agent	There is no default account for this service. The account you use depends on your security requirements.	Automatic
SQL Server Database Engine	This account defaults to NT AUTHORITY\SYSTEM. The account you use depends on your security requirements.	Automatic
SQL Full-Text Filter Daemon Launcher	This account defaults to NT AUTHORITY\LOCAL SERVICE. The account you use depends on your security requirements. Microsoft recommends using a low privilege account.	Manual
SQL Server Browser	The default logon account is NT AUTHORITY\LOCAL SERVICE. You will typically keep this setting.	Automatic

b. Click **Next** to proceed. The Database Engine Configuration page opens.

14. In the Database Engine Configuration page, under the **Account Provisioning** tab, choose one of these options:

    - **Windows authentication mode** If you choose this option and are not logged in as an administrator, it is recommended that you add an account that has sufficient permissions to perform all of the needed SQL administrative tasks. If you are logged in as an administrator, it is recommended you also click **Add Current User**.

      OR

    - **Mixed Mode (SQL Server authentication and Windows authentication)** If you choose this option, it is recommended you use a password that does not expire. If you do not follow this recommendation, you can later change an expired password via the Control Panel. For steps, see "Changing Expired Pulse Passwords" on page 140.

      When finished, click **Next**.

15. In the Error Reporting page, select whether or not you want to send error reports to Microsoft. This is your preference. Then click **Next**. The system performs another system check operation to find out if any problems might occur when you install SQL.

16. In the Installation Rules page, do the following:
    - If there are issues, you must first address them and then click **Next**.

      OR
    - If there are no issues, click **Next**.
17. In the Ready to Install page, click **Install** to begin the installation. A progress indicator shows you the status of the installation process.
18. In the Installation Progress dialog, you will see the "Success" message when the setup process is complete. Click **Next**.
19. In the Complete dialog, review the information. Then click **Close**.

    If you are installing Microsoft SQL Server 2008 on Windows Server 2008 R2, Microsoft recommends updating SQL Server to Service Pack 1 (SP1) or later. This resolves known compatibility issues between SQL and the operating system.

    Before updating your version of SQL, be sure to read the installation instructions from Microsoft. These Service Packs are cumulative, so if you install Service Pack 3, it will also install the fixes from Service Packs 1 and 2:

    - **SQL Server 2008 Service Pack 3** Visit the Microsoft Download Center at:

      http://www.microsoft.com/en-us/download/details.aspx?id=27594
    - **SQL Server 2008 Service Pack 2** Visit the Microsoft Download Center at:

      http://www.microsoft.com/en-us/download/details.aspx?id=12548
    - **SQL Server 2008 Service Pack 1** Visit the Microsoft Download Center at:

      http://www.microsoft.com/en-us/download/details.aspx?id=20302

HOW TO INSTALL SQL SERVER 2008 EXPRESS WITH ADVANCED SERVICES

It is recommended that you apply all available service packs and critical updates to your operating system prior to the installation.

Important: If you plan to install Microsoft SQL Server 2008 R2 Express, you *must* install the Express Edition with Advanced Services because it supports full-text search.

Important: Microsoft SQL Server 2008 R2 Express Edition with Advanced Services is limited to a maximum database size of 10 GB, so is best suited for lab, test, or demonstration environment. It is not the best choice for production environments.

Important: If the system where you plan to install Microsoft SQL Server 2008 R2 Express Edition with Advanced Services is not running Windows PowerShell 1.0, it is recommended that you install it before installing SQL.

1. Log in to the server as an administrator.
2. (Optional) Create a directory on the server to store the installation media.
3. Download the installation media from the Microsoft Download Center at:

   http://www.microsoft.com/en-us/download/details.aspx?id=25174

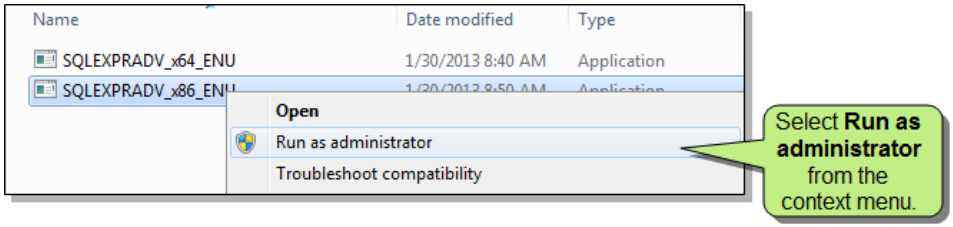
   Note: It is recommended that you store the installation media in a folder that you create on the server.

4. Run the setup program as an administrator:
   - **For 64-bit Platforms** This is the file named SQLEXPRADV_x64_ENU.exe.
   - **For 32-bit Platforms** This is the file named SQLEXPRADV_x86_ENU.exe.

HOW TO RUN THE SETUP PROGRAM AS AN ADMINISTRATOR

a. If you did not log into the server as an administrator, navigate to the setup program.

b. Right-click the appropriate setup program and select **Run as administrator** from the context menu.



The setup program begins extracting the files. When finished, the SQL Server Installation Center opens.

5. On the Installation page, click **New installation or add features to an existing installation**.

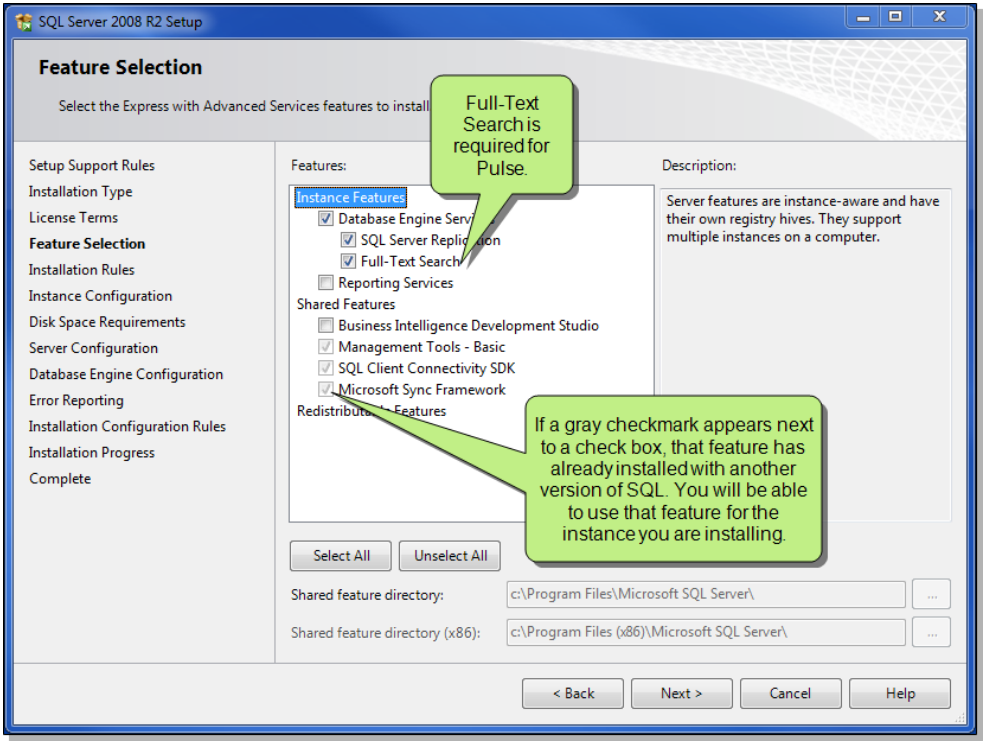
   The Setup Support Files page appears and the program performs a check to detect potential issues.

> **Note:** If errors are found, you must resolve them before continuing. When the Setup Support Rules operation is complete, click **OK** to proceed to the Installation Type page.

6. In the Installation Type Page, select the **New installation or add shared features** button. Then click **Next**.

> **Note:** For SQL Server 2008 R2 Express Edition with Advanced Services, you do not need to enter License Terms.

7. In the Feature Selection page, set the options you want. Always ensure there are check marks in these boxes:
   - **Database Engine Services** This is needed to store, process, and keep your data secure.
   - **Management Tools - Basic** This provides the management tools needed by server administrators.
   - **Full-Text Search** This is required to give users the ability to search in Pulse.
   - **SQL Client Connectivity SDK** This feature installs the files needed to develop a SQL Server Native Client applications.



> **Note:** If you are not familiar with SQL Sever, it is recommended that you keep the default selections.

> **Note:** If a gray check mark appears next to a check box, that feature has already been installed with another version of SQL. You will automatically be able to use that feature with your SQL instance.

8. In the Feature Selection page, click **Next**. The setup program performs a check to detect any potential issues.

> **Note:** If issues are found, you must resolve them before proceeding. When resolved, click **Next** to continue to the Instance Configuration page.

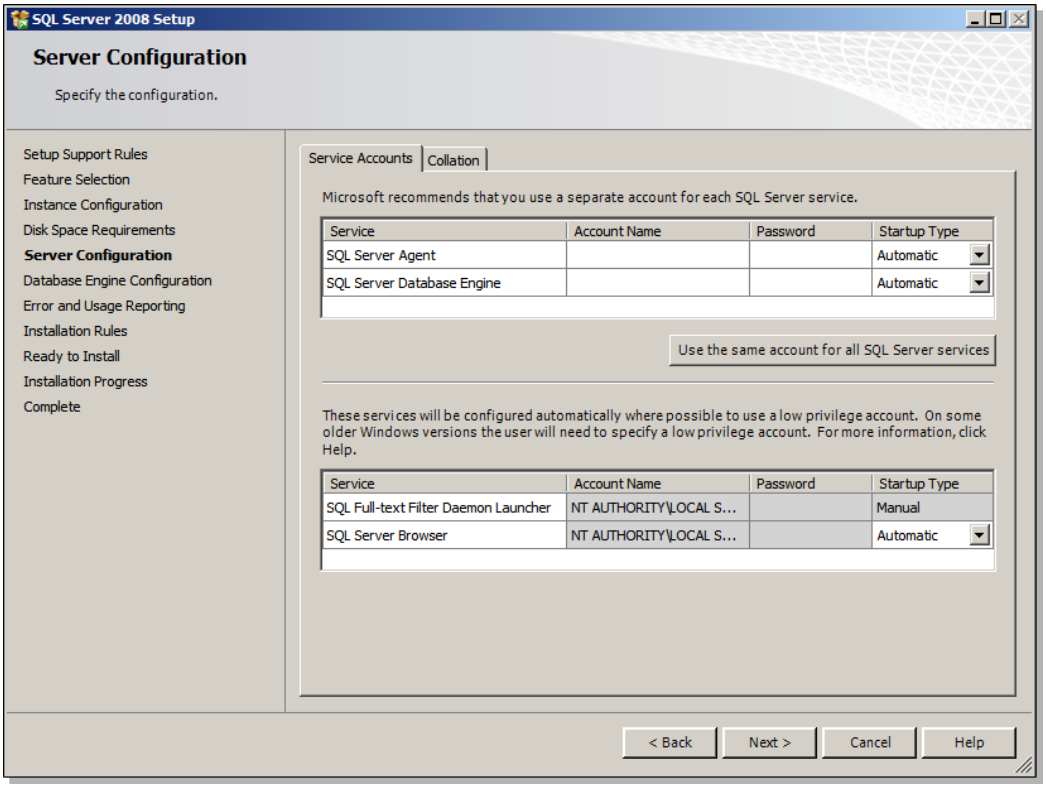
9. In the Instance Configuration page, select one of these buttons:
   - **Default instance** If this is the first time SQL Server is being installed on the system, you can use the default instance of SQL server. The name is `SQLExpress`.

     OR
   - **Named instance** If you want to create a named instance, type the desired name. For example, type `PULSE01`.

> **Note:** Microsoft SQL Server Express supports a maximum database size of 10GB. It will not check your system to see if your system meets the disk space requirements.

10. Click **Next** to open the Server Configuration page.

11. In the Server Configuration page, under the **Service Accounts** tab, make sure the **Startup Type** selection is set as follows:



Service	Account Name/Password	Startup Type
SQL Server Database Engine	This account defaults to NT AUTHORITY\NETWORK. The account you use depends on your security requirements.	Automatic
SQL Full-Text Filter Daemon Launcher	This account defaults to NT AUTHORITY\LOCAL SERVICE. The account you use depends on your security requirements. Microsoft recommends using a low privilege account.	Manual
SQL Server Browser	The default logon account is NT AUTHORITY\LOCAL SERVICE. You will typically keep this setting.	Automatic

When finished, click **Next**.

12. In the Database Engine Configuration page, choose one of these options:
    - **Windows authentication mode** If you choose this option and are not logged in as an administrator, it is recommended that you add an account that has sufficient permissions to perform all of the needed SQL administrative tasks.
    - **Mixed Mode (SQL Server authentication and Windows authentication)** If you choose this option, it is recommended you use a password that does not expire. If you do not follow this recommendation, you can later change an expired password via the Control Panel. For steps, see "Changing Expired Pulse Passwords" on page 140.
13. When finished, click **Next**.
14. In the Reporting Services Configuration page, choose **Install the native mode default configuration**. Then click **Next**.
15. In the Error Reporting page, click **Next**.
    - If there are no issues, the Installation Rules page appears for a moment and then the installation begins.

      OR
    - If there are issues, you must first address them and then click **Next**. In the Ready to Install page, click **Next**.
16. On the Server Configuration page, click **Next**. The Error and Usage Reporting page opens.
17. On the Installation Rules page, click **Next**. The Ready to Install page opens.
18. On the Ready to Install page, click **Install** to begin the installation.
19. When the installation is complete, you will see the "Installation Succeeded" message. Click **Close**.

Installing and Activating Pulse

Information for Network Administrators

After preparing the Pulse web server and database server for the installation process (see "Installing the Prerequisites" on page 23), you can install Pulse.

List of Pulse Components

The Pulse setup program installs the following components and features on your server:

- **Pulse Server Application** This is the server application that you install on the Pulse web server. Pulse Administrators use this tool to perform the initial server configuration.
- **Pulse Dashboard** This is the web dashboard that Pulse Administrators use to view different configuration settings and to manage the embedded discussion forms in the output. Registered users can access the dashboard using the Pulse URL.
- **Community Tab and Embedded Discussion Forms** This is the Community tab (optional) and the embedded discussion form that integrates with your published Flare output. It gives users the ability to share knowledge and expertise by posting status updates, asking and responding to questions about topics, creating articles, and more.

List of Windows Service Applications

Pulse runs the following Windows service applications:

- **MadCap Pulse Management Service** This service supports the Pulse application.
- **Pulse Service** This service also supports the Pulse application.
- **RabbitMQ** This service supports communication between IIS and SQL Server. It also monitors the amount of RAM on the server. When free space becomes low, this service raises alarms and block connections for the server.

Installing the Pulse Server Application

Do the following on the web server (this is the server running IIS):

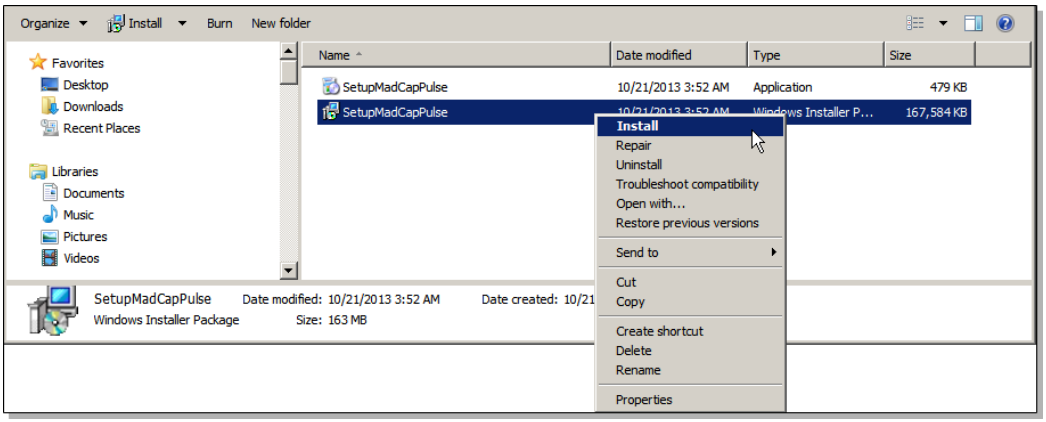
HOW TO INSTALL THE PULSE SERVER APPLICATION

1. Install the prerequisite software. See "Installing the Prerequisites" on page 23.
2. Install a Microsoft SQL Server instance for the Pulse database. See "Installing Microsoft SQL Server" on page 47.
3. Obtain the installation media and a license code from MadCap Software:
   - **CD** Insert the installation CD.
   - **Online** Download the setup program using the link that you received from MadCap Software.

> **Note:** You can obtain the Pulse license code from your MadCap Software Sales Representative.

> **Note:** You can create an unlimited number of Flare communities with your Pulse license code.

4. Log on to the server running IIS using an account that has administrator privileges.
5. Right-click the Pulse setup program and select **Install** from the context menu. This is the Windows Installer Package file named "SetupMadCapPulse.msi."



IF YOU ARE NOT LOGGED IN AS AN ADMINISTRATOR

If the Install context menu command does not appear, you are not logged in as an administrator. You can use the steps below to run the program as an administrator:

a. Navigate to the Pulse setup program. This is the Windows installer package named "SetupMadCapPulse.msi."

b. Right-click the setup program and select **Run as Administrator** from the context menu.

c. If prompted by Windows User Account Control (UAC), click **Yes** or **Continue**.

d. If you are logged in with a different account, you may be prompted to enter the user name and password for the administrator account. After entering the account information, click **Yes**.

6. When the Welcome page of the MadCap Pulse Setup Wizard appears, click **Next**.
7. Select the **I Agree** option to accept the terms of the license agreement. Then click **Next**.
8. In the **Select Installation Folder** page, browse to the desired installation folder or accept the default folder. Then click **Next**.

Note: The default installation folder for 32-bit applications on 64-bit platforms is: C:\Program Files (x86)\MadCap Software\MadCap Pulse. For 32-bit platforms it is: C:\Program Files\MadCap Software\MadCap Pulse.

Note: To view a list of drives where you can install Pulse and to see the available/required space on the drives, click the **Disk Cost** button.

Note: To make the Pulse application available to any user who logs into the server, click **Everyone**. To make the program available only to the logged in user account, click **Just Me**.

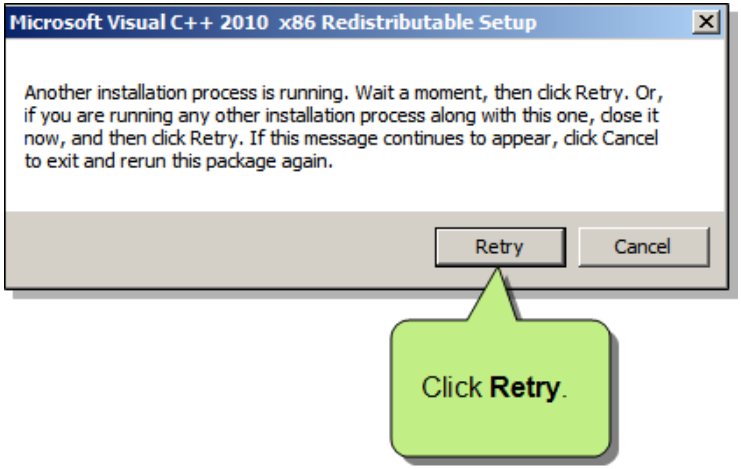
9. In the **Confirm Installation** page, click **Next**. A progress indicator shows the status of the process.

IF YOU ARE PROMPTED TO INSTALL THE VISUAL C++ 2010 REDISTRIBUTABLE

If the Microsoft Visual C++ 2010 Redistributable is not installed on the server, a dialog box will prompt you to install it. Here is how you proceed through the system check:

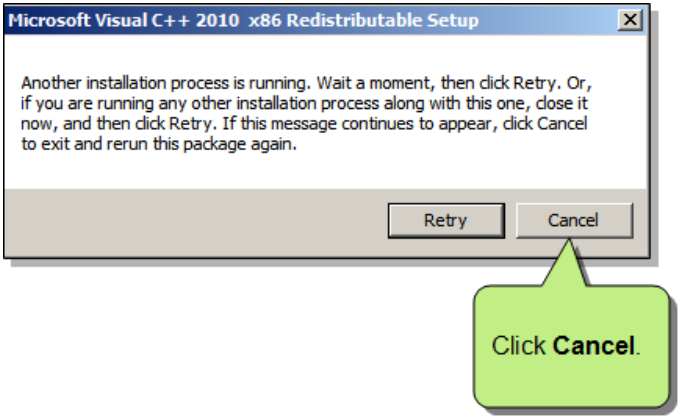
a. Place a check mark in the **I have read and accept license terms** box. Then click **Install**. A progress indicator appears to show you the status.

b. If the following message appears, click **Retry**.



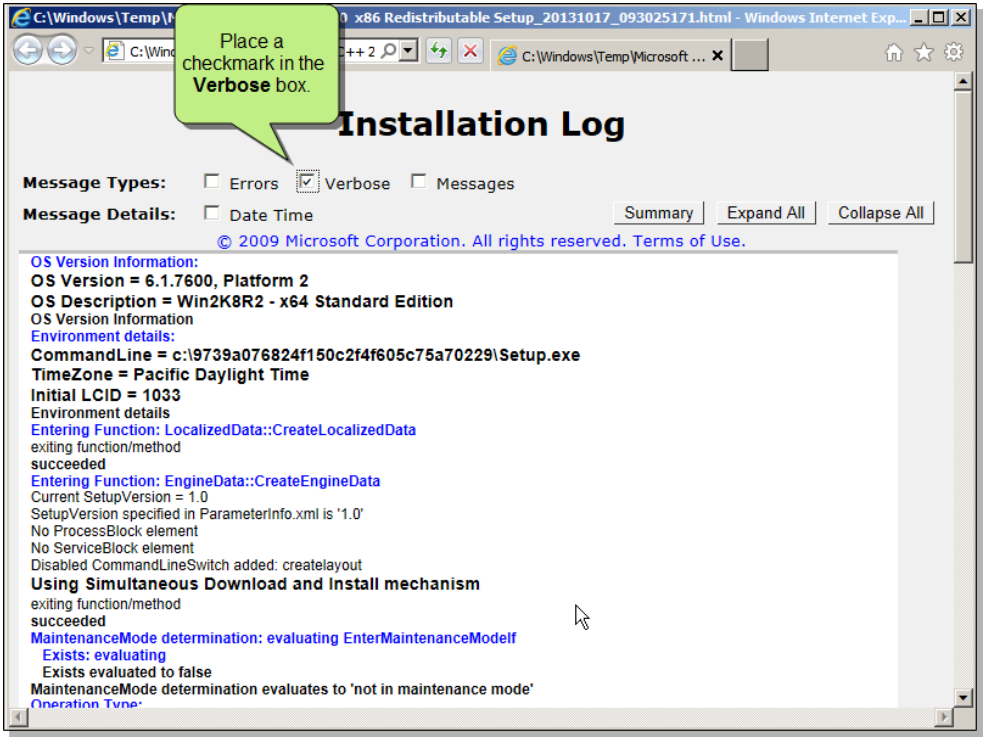
c. Depending on your system, one of the following occurs:

- If you do not have the correct distributable, you will be prompted to install it.
- If the following message reappears, click **Cancel**. In most situations, this means the setup program has detected a newer version of Visual C++ on your system and is installing the required elements. The remaining steps show you how to proceed.

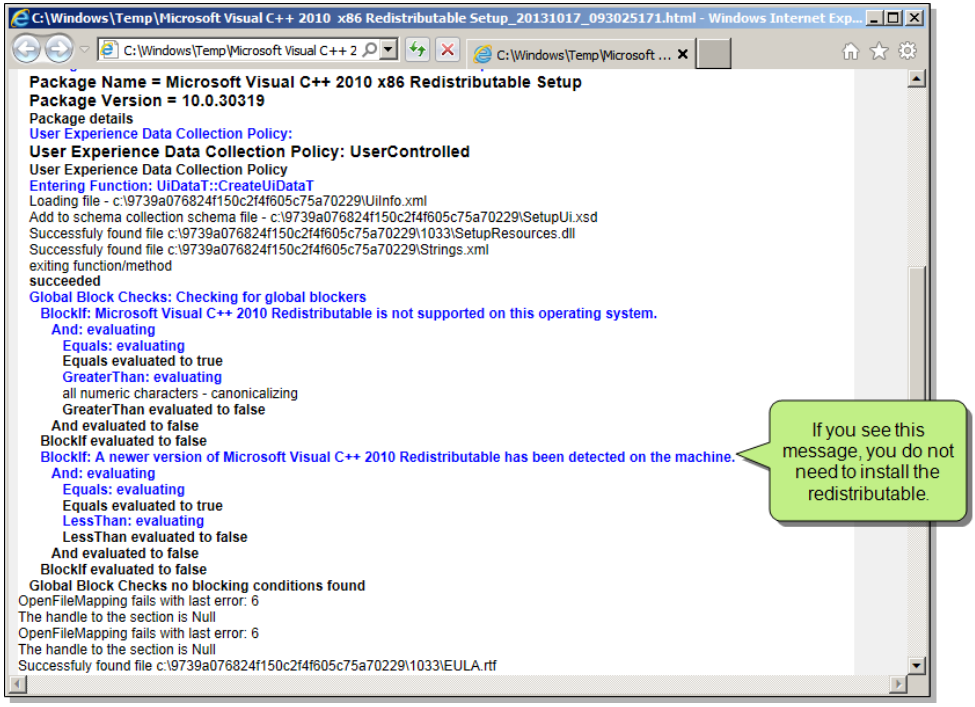


d. In the Installation Did Not Succeed dialog, click the **log file** link.

e. In the Installation Log, place a check mark in the **Verbose** box.



f. Scroll down the log and determine if the operating system is running a newer version of the redistributable:



Note: If you are running a newer version of the redistributable, you do not need to install version 2010.

g. Close the Installation Log.

h. Click **Finish** in the Installation Did Not Succeed dialog.

10. In the **Installation Complete** page, click **Close**.

Note: After completing the installation, use Windows Update to run any available .NET Framework updates on the server. For information about Windows Update, visit this Microsoft link: **http://windows.microsoft.com/en-us/windows/help/windows-update**.

Activating Pulse

After successfully installing Pulse, you must activate the product.

HOW TO ACTIVATE PULSE

1. Log on to the server running IIS using an account that has administrator privileges.
2. Launch the Pulse server application.

   HOW TO LAUNCH THE PULSE SERVER APPLICATION

   - **From the Desktop** Hold down the **Shift** key and right-click to select **MadCap Pulse** from a context menu. To use this method, you must be logged in as an administrator.

     OR

   - **On 64-bit Systems** Double-click the **Pulse.exe** file. The path to this file is C:\Program Files (x86)\MadCap Software\MadCap Pulse\Pulse.app\Pulse.exe.

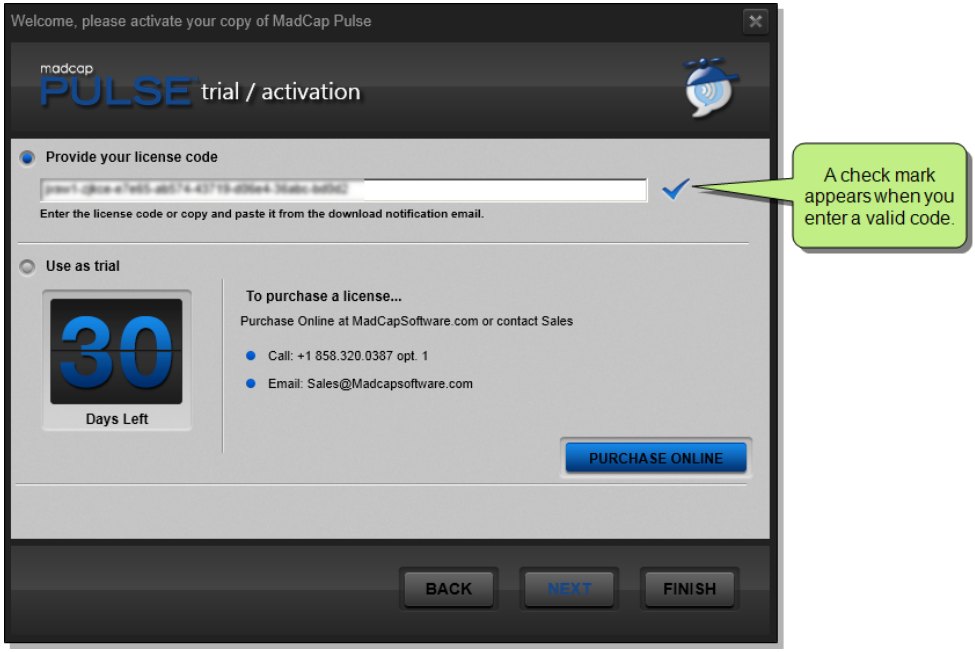
     OR

   - **On 32-bit Systems** Double-click the **Pulse.exe** fie. The path to this file is C:\Program Files\MadCap Software\MadCap Pulse\Pulse.app\Pulse.exe.
3. In the Trial/Activation dialog, do one of the following in the **Provide Your License Code** field:
   - Type the license code that you received from MadCap Software.

     OR

   - Copy the license code from your download notification email and paste it into the field.

A check mark appears when you enter a valid code.



4. Click **Next**.
5. In the Enter Your Information page, type your name and email address in the fields provided.
6. Click **Next**.

7. Select the desired activation method:

   - **Internet Activation** If you are connected to the Internet, select this option. If you are behind a firewall, you may need to enter your Proxy Server information.

     HOW TO ACTIVATE WITH A PROXY SERVER

     a. If you are behind a firewall, place a check mark in the **Use Proxy Server** box:
     b. Enter the required proxy server and authentication information for your network.
     c. Click **Next**.

     OR

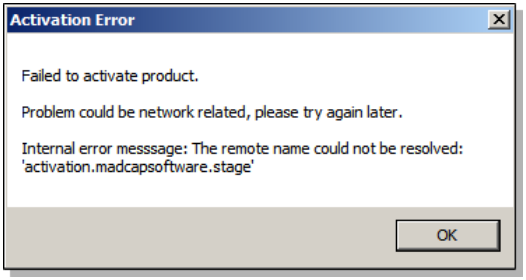
   - **Manual Activation** To activate by email, select this option. Then enter the license code and machine ID.

8. Click **Next**.
9. Copy and paste the activation code included in the email that was sent to the provided address.
10. Click **Next**.

    The system activates your product.

    IF YOU ENCOUNTER ACTIVATION ISSUES

    If you encounter an activation issue, an error message similar to the one below appears. Take note of the error message text as it can help you troubleshoot the issue.



    Possible issues that might be encountered during the activation process include:

    - **Entering an Invalid License Code** Try re-entering your code to make sure it was typed correctly. If you have purchased other MadCap products, make sure the code you typed is for the Pulse product.
    - **Entering a License Code that Has Already Been Activated** If Pulse has already been activated on another system, you will need to deactivate it before using the license code on a different system.

- **Your System Cannot Communicate With the Activation Server** The system where you are installing Pulse is not able to communicate with the MadCap Activation Service. We suggest checking your network and Internet connection and after waiting a few minutes, try to activate the product again.
- **You Must Use a Proxy Server** If you are using the Internet Activation method, a notification message like the one below typically indicates that you will need to use a proxy server to access external URLs. To obtain your proxy server information, see your Network Administrator. Then try to activate your product again. If you experience an issue, theMadCap Software knowledge base has a helpful tip about registration behind a proxy server: **http://kb.madcapsoftware.com/default.htm#cshid=GEN1004Z**

The Welcome page of the Pulse Configuration Wizard appears so you can configure Pulse for first time use. See "Pulse Server Configuration" on the following page.

Pulse Server Configuration

This feature is available to **Administrators** only.

After the Pulse server application is installed on the Pulse web server, use the desktop shortcut or the Programs menu in Windows to start the Pulse application.

Configuring Pulse for the First Time

After you install and activate the Pulse server application, the Welcome page of the MadCap Pulse Configuration Wizard appears so you can perform an initial configuration.

HOW TO CONFIGURE PULSE FOR FIRST TIME USE

1. Install and activate Pulse as described in "Installing and Activating Pulse" on page 78.
2. If the MadCap Pulse Configuration Wizard is not already open, double-click the MadCap Pulse desktop shortcut.
3. In the Welcome page of the MadCap Pulse Configuration Wizard, click **Next**.
4. In the Select Web Site page, do the following:
   a. **Select the Website for the Pulse Services** Select the website on the IIS Server that will be storing your Pulse data. By default, Pulse will use the "Default Web Site" in IIS.
   b. **Pulse Server URL** This is the Site URL for the Pulse dashboard. Typically, it will consist of the protocol (http:// or https://), the IP address (or the machine name), and the Pulse directory.

E X A M P L E S

HTTP:

http://<ipaddress>/pulse

http://<servername>/pulse

Secure HTTP:

https://<ipaddress>/pulse

https://<servername>/pulse

c. Click **Next**.

5. In the Select SQL Server page, do the following:

   a. In the **SQL Server** drop-down list, select **Get list of SQL Servers**.

      If the SQL Server Browser service is turned on, the program looks for all available SQL Servers in the Windows domain.

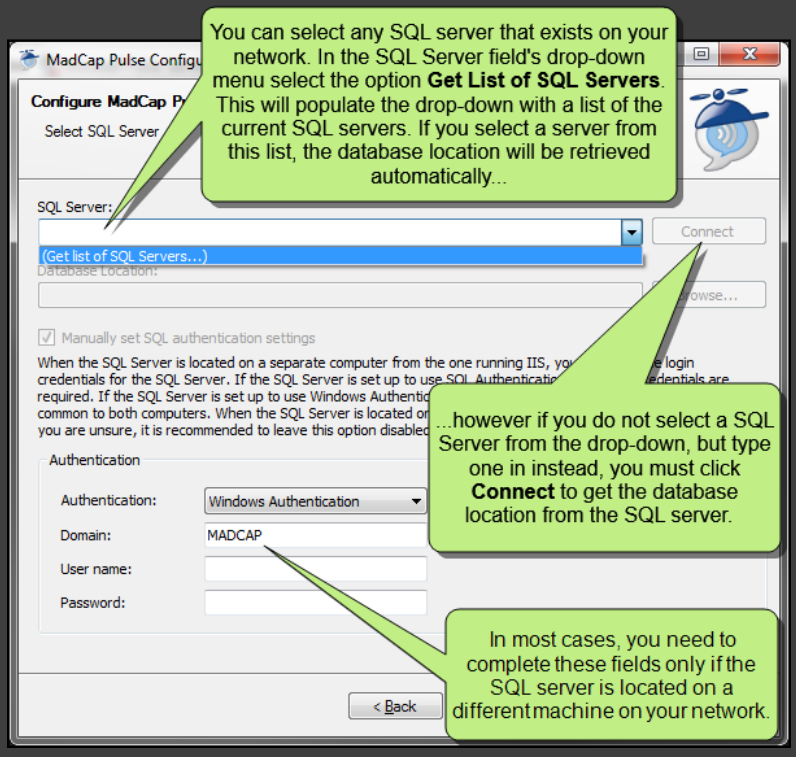
      HOW TO TURN ON THE SQL SERVER BROWSER

      If SQL Server Browser service is turned off, use these steps to turn it on:

      i. Start the SQL Server Configuration Manager.
      ii. Select **Start>Programs**. Then point to your version of SQL in the menu and select **Configuration Tools>SQL Server Configuration Manager**.
      iii. In the left pane, highlight **SQL Server Services**.
      iv. Right-click **SQL Server Browser** and select **Properties** from the context menu.
      v. On the **Service** tab, set the start mode to **Automatic** and click **OK**.
      vi. Right-click the **SQL Server Browser** again, and select **Start**.

b. In the SQL Server drop-down list, select the desired server. Then click **Connect**.

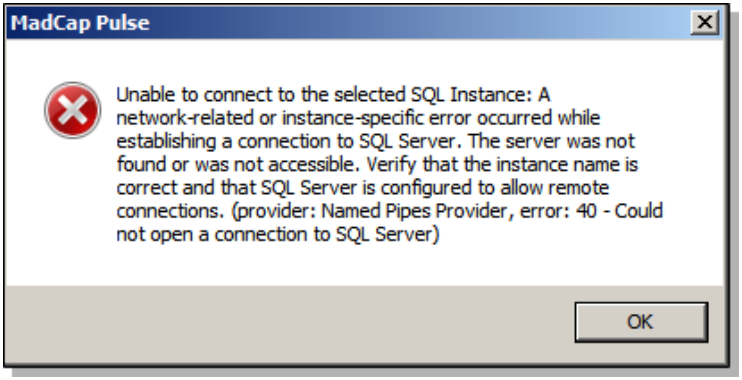
Note: You can alternatively enter the IP Address or Computer Name of the server in the **SQL Server** field. Use this format: `<Server Name>\<SQL Instance>` or `<IP Address>\<SQL Instance>`



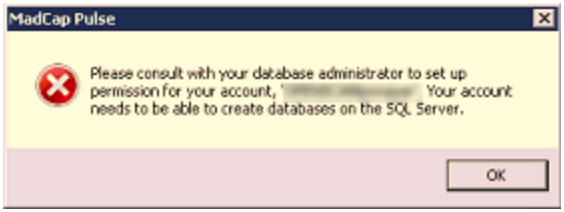
IF YOU ENCOUNTER A CONNECTION FAILURE

If the SQL Server is not local (i.e., it resides of a different server than the Pulse web server), it is common for users who might be less familiar with networking to experience failures when the following is true:

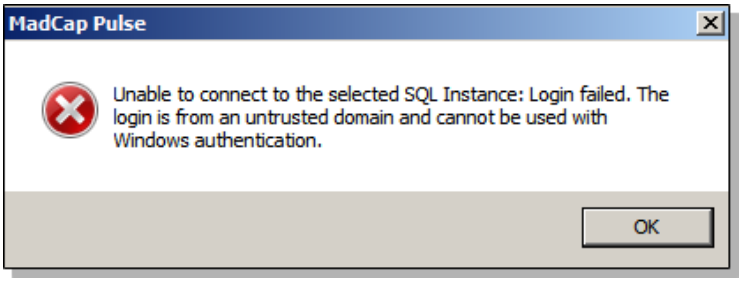
- The SQL Server name and/or instance was entered incorrectly. You must enter the correct server name and instance.



- The account that you are using to perform the installation does not have sysadmin permission on the SQL Server. See your SQL Server Administrator or Network Administrator for the appropriate account to use.



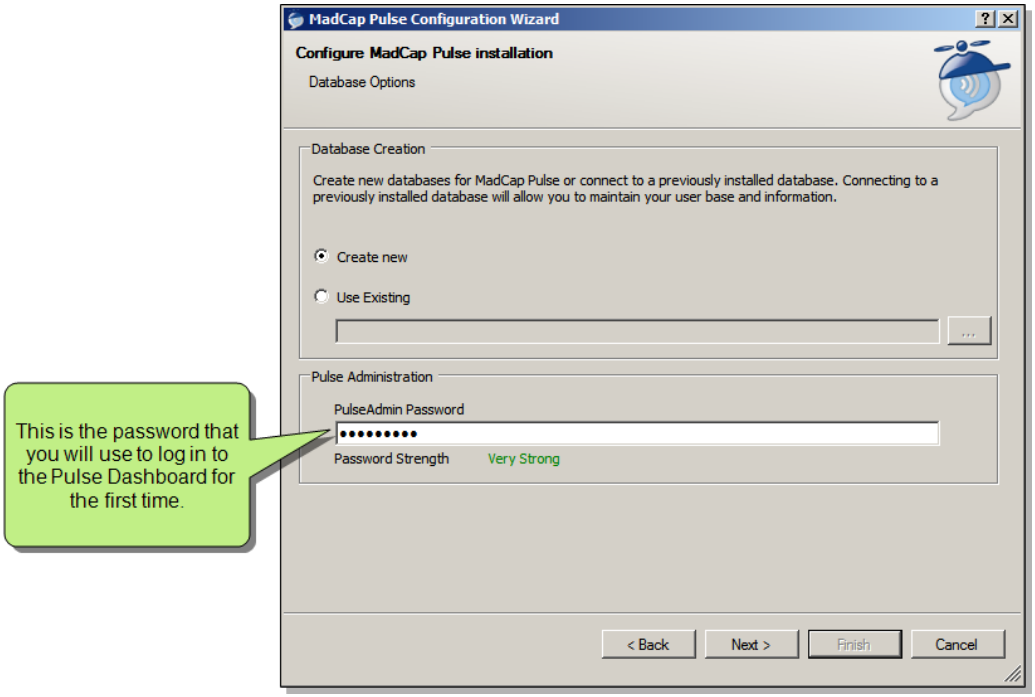
- The SQL Server resides in an untrusted Windows domain. There must be a domain trust relationship between the Pulse web server and SQL server hosting the Pulse database. Make sure you selected the correct server.



6. In the Database Options page, select one of the following options:
   - **Create new** This creates a new database instance with Pulse.

     OR
   - **Use existing** Select this option only if you have previously installed Pulse. You may click the Browse (…) button to open the Select Database dialog. Select the desired Pulse Database ID from the list. Then click **Connect**. Then click **OK**.

7. In the **PulseAdmin Password** box, specify the password for the default Pulse Administrator account. Then click **Next**.



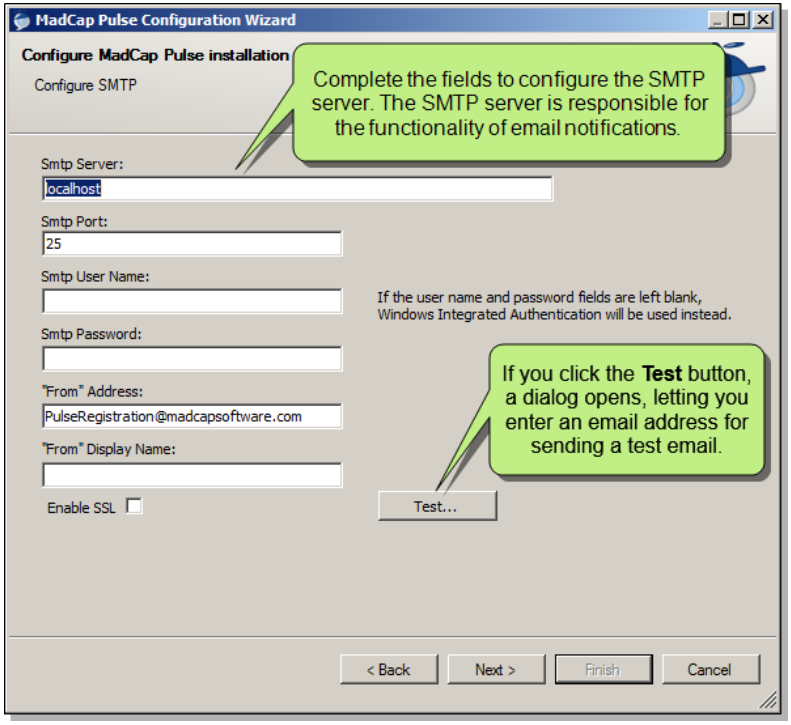
Important: Record this password in a safe place. This is the default PulseAdmin account. You will need this information to log into the Pulse dashboard for the first time. See "About the Pulse Dashboard" on page 163.

Note: As you type, the program lets you know when your password meets the minimum password strength thresholds, such as Very Weak, Medium, Strong, Very Strong, and Excellent.

8. In the Configure SMTP page, enter your SMTP server settings:

> **Note:** To get your SMTP server settings, see your Email or Network Administrator.

- **SMTP Server** This is the IP address of the SMTP relay that accepts incoming requests which is the host that will send outbound emails for Pulse.
- **SMTP Port** This is the port number of the SMTP server handing outbound emails. This is Port 25 (or the port number for your environment).
- **SMTP User Name** This is the username of a valid account on the SMTP relay.
- **SMTP Password** This is the password for the valid account on the SMTP relay.
- **From Address** This is the from address for emails sent by Pulse. You must have a valid address for this account. For example, type : `PulseRegistration@example.com`.
- **From Display Name** This is the name that displays in email client applications for the email address. For example, type: `Pulse Registration`.
- **Enable SSL** A check mark in this box enables Secure Socket Layers (SSL) encryption. It is recommended that you leave this box blank.



Note: If you have content security requirements, purchasing an SSL certificate for your web domain is suggested. This lets you enable SSL transport security, so users can access your site via the https:// protocol. This ensures that the page content that a URL points to is encrypted while the data is being transmitted to your end user (so the content is not visible to others as it passes through the communication chain). See your Network Administrator for more information about SSL.

9. (Optional) Test your STMP settings.

    a. In the Configure SMTP dialog, click **Test**.
    b. In the SMTP Test dialog, enter a valid address in the **Email address** box.
    c. Click **Sent Test Email**.
    d. Depending on which message you see, do the following:

        - **Test message has been sent** Click **OK**. Then check the email account to ensure you received the test email.
        - **Error sending message** Click **OK**. Ensure that you entered the correct SMTP settings for your environment. Then try testing the settings again.

10. When finished, click **Next** to open the Configure SMTP page.
11. Click **Next**. The Verify Configuration page appears.
12. In the Verify Configuration page, review the components list. When you are ready to proceed, click **Next**. A progress indicator shows you the status of the installation.
13. When the Configuration Complete page appears, click **Finish**.

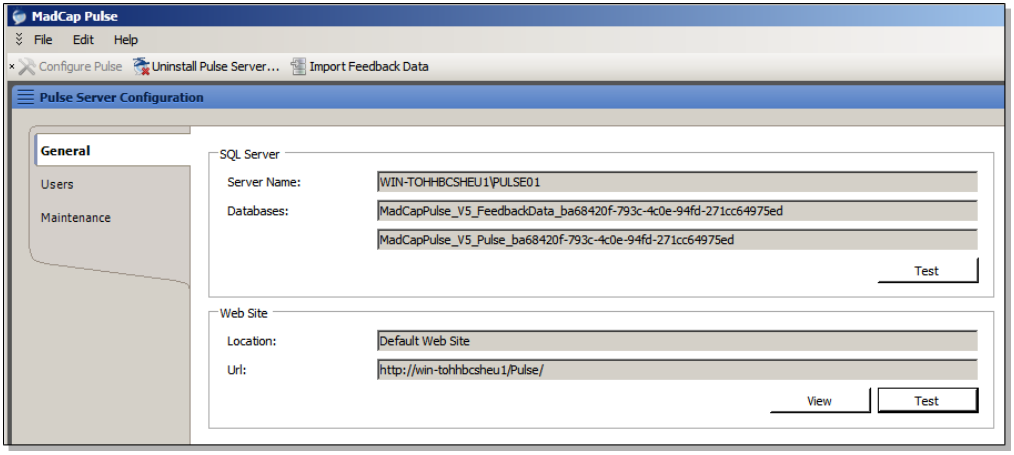
Starting the Pulse Server Application

When you start the Pulse server application, the system opens the Pulse Server Configuration window.

HOW TO START THE PULSE SERVER APPLICATION

1. Log in to the Pulse web server as an administrator.
2. Start the Pulse application by selecting one of these options:
   - **Desktop Shortcut** On the Windows desktop, click the MadCap Pulse shortcut. This is automatically added to the desktop at the end of the installation process.
   - **Start Menu** In Windows, click **Start>All Programs>MadCap Software>MadCap Pulse**.
   - **Program Files** Double-click the program icon in the Program Files directory. If you installed the program using the default installation folder, it is located at one of these paths:
     - **On 64-bit Platforms** C:\Program Files (x86)\MadCap Software\MadCap Pulse\Pulse.ap-p\Pulse.app
     - **On 32-bit Platforms** C:\Program Files\MadCap Software\MadCap Pulse\Pulse.app\Pulse.app

Here is the Pulse Server Configuration window:



Setting the PulseAdmin Password

During the Pulse installation, you created a password for the default PulseAdmin account. You can reset that password at any time.

HOW TO SET THE PULSEADMIN PASSWORD

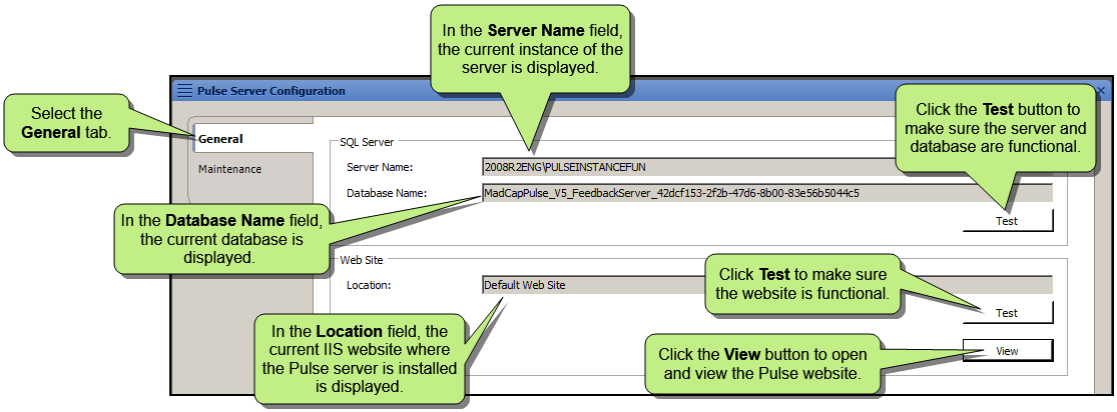
1. Log in to the Pulse web server as an administrator:
   - **Username** The username is always "PulseAdmin" by default.
   - **Password** This is the password that you defined during when you installed the Pulse server application.
2. Start the Pulse server application.
3. Select **File>Set Admin Password**.
4. In the **Set PulseAdmin Password** box, type a new password. Then click **OK**.
5. In the configuration dialog, click **OK** to acknowledge that your password was updated.

Pulse Server Configuration Window

The Pulse Server Configuration window contains options that let you perform a variety of maintenance and management tasks.

GENERAL TAB

The controls in the **General** tab give you the ability to view and test the general connection settings for the Pulse server application.



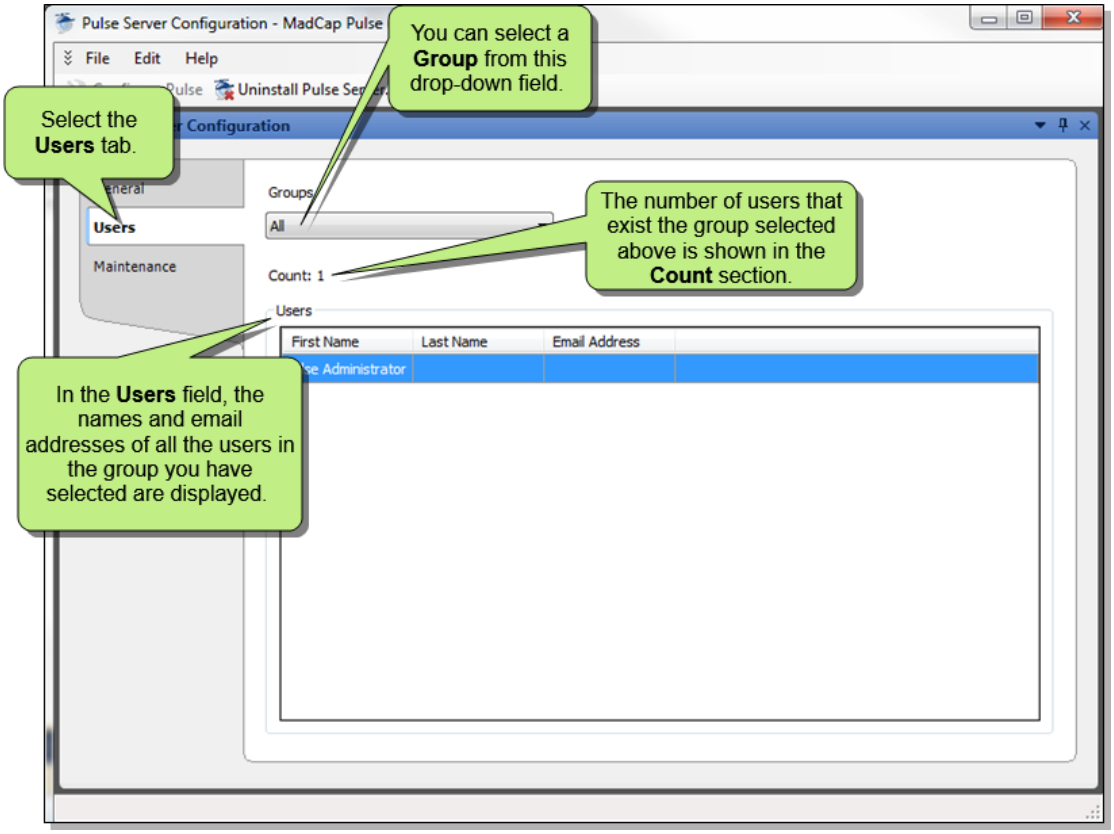
GENERAL TAB REFERENCE

User Interface	Description
SQL Server	Contains information about your Pulse database.
Server Name	A read-only field that shows the computer name of the SQL Server and the instance for the Pulse database.
Databases	A read-only field that shows the Database IDs for the Pulse databases.
Test	Click this button to test the database connection settings. ***HOW TO TEST THE SQL SERVER SETTINGS*** 1. Launch the Pulse server application. 2. In the Pulse Server Configuration window, select the **General** tab. 3. In the SQL Server area, review the Server Name and Databases that were configured during installation. 4. Click **Test**. 5. If the test is successful, the system shows a message indicating this. 6. Click **OK** to close the message.
Web Site	Contains information about the site running on your Pulse web server.
Location	Typically this reads Default Web Site.
URL	The URL for the Pulse dashboard.

User Interface	Description
View	Click this button to open the Pulse dashboard in a web browser. ***HOW TO VIEW THE WEB SITE SETTINGS*** 1. Start the Pulse server application. 2. In the Pulse Server Configuration window, select the **General** tab. 3. Click **View**. 4. Depending on your configuration, one of the following occurs: » **If You are Able to View the Web Site** If your web site settings is properly configured, the Pulse Dashboard appears in a separate browser window. OR » **If You are Not Able to View the Web Site** If your web site settings are not properly configured, a "Pulse was not able to process your request message" may appear. See "Pulse Installation Frequently Asked Questions" on page 141.
Test	Click this button to test the web site settings. ***HOW TO TEST THE WEB SITE SETTINGS*** 1. Start the Pulse server application. 2. In the Pulse Server Configuration window, select the **General** tab. 3. Click **Test**. 4. Depending on your configuration, one of the following occurs: » **Web site test succeeded** If your web site settings is properly configured, the Web site test succeeded dialog appears. OR » **Web site test failed** If your test is not successful, an error message is shown. See "Pulse Installation Frequently Asked Questions" on page 141.

USERS TAB

The controls in the **Users** tab provides you with user counts and name information.

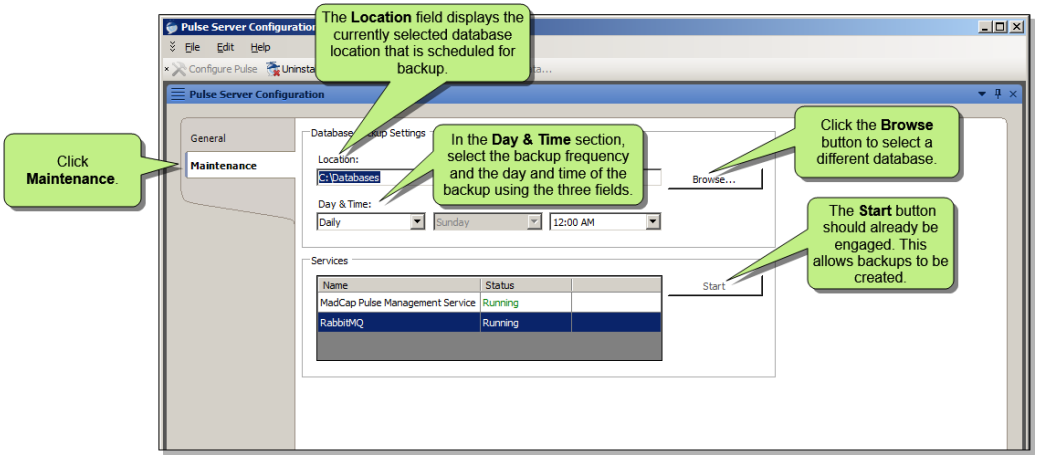


User Interface	Description
Groups	Select one of the listed groups from the drop-down list. ***HOW TO VIEW USER COUNTS AND INFORMATION*** 1. Start the Pulse server application. 2. In the Pulse Server Configuration window, select the **Users** tab. 3. From the **Groups** list, select one of these options: » **All** View counts and users for all administrative and registered users. » **Administrators** View user counts and member information for the Administrators group. » **All Users** View user counts and member information for all registered users. » **Customers** View user counts and member information for members of the Customers group » **Employees** View user counts and member information for members of the Employees group
Count	A read-only field. Shows the total number of users for the selected group.
First Name	A read-only field. The last name of the user.
Last Name	A read-only field. The first name of the user.
Email Address	A read-only field. A valid email address for the user.

MAINTENANCE TAB

The controls in the **Maintenance** tab lets you manage the Pulseserver application's services. The options that are available in this dialog depend on the version of Microsoft SQL Server being used:

» **If You are Using Microsoft SQL Server Express Edition with Advanced Services** You have the ability to view and start the Pulse Server and RabbitMQ service (these are both services that run in Windows). You also have the ability to schedule database backups.



HOW TO SCHEDULE A BACKUP

This feature is available only when the Pulse database is using Microsoft SQL Server Express Edition with Advanced Services.

Use the Maintenance tab to scheduled backups of your Pulse database, whether it resides on the local server or a different server on the network.

You can schedule a backup of your Pulse database on the SQL server on a daily or weekly schedule. This saves your database information in a backup file (e.g., a file with the BAK file name extension).

In the event that a database recovery is needed, your SQL Administrator can use SQL Server Management Studio to restore your Pulse database using the latest backup file.

Important: For a backup to take place at the scheduled time, the Pulse web server must be powered on and the MadCap Pulse Management Service and RabbitMQ service and must be running.

1. Start the Pulse server application.
2. In the Pulse Server Configuration window, select the **Maintenance** tab.
3. In the **Location** field, click **Browse**. Then, navigate to the directory where you want to save the backup files. Important things to keep in mind:
   - **Local Backup** If you want to store the backup file (BAK) on the local system, the default backup folder is : C:\Databases. *This is the recommended method*.
   - **Network Drive** If you want to store the backup file (BAK) on a network drive, select the desired location.

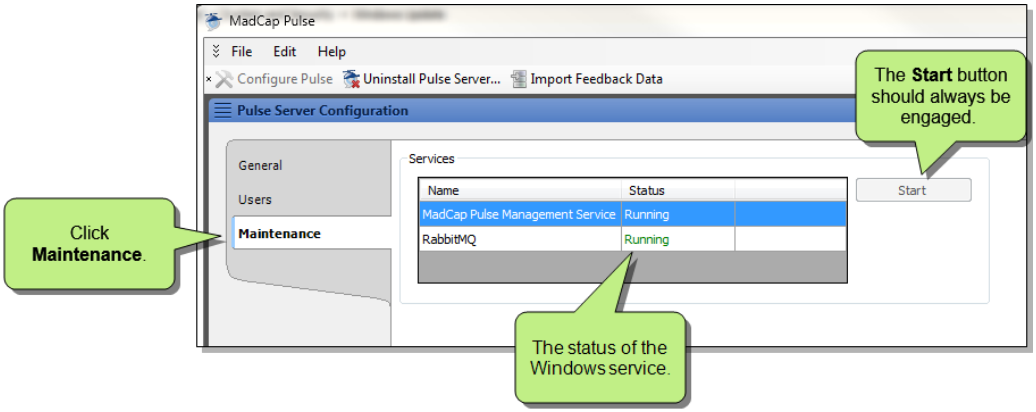
     Note: If you choose this method, the Pulse web server must have permission to write to the drive. In addition, the system drive must be powered on and connected to the network at the scheduled backup time.
4. In the **Day & Time** fields, specify the desired backup schedule:
   - **Daily or Weekly** Select either **Daily** or **Weekly**.
   - **Day of Week** If you select a Weekly backup schedule, you can also select the desired day to perform the backup.
   - **Time** Select the time of day to perform the backup.
5. As long as the listed Services are running, you will not need to click **Start**. In the event that services stop running,simply click **Start** to restart the services and backup schedule.

   Warning: You do not have the ability to disable the MadCap Pulse Management Service or Rabbit MQ service. To function properly, the Pulse server application requires these Services to run in the background.

6. Save your changes by selecting **File>Save**.

> **Note:** If you do not save your changes, you will be prompted to save them when you exit the application.

» **If You are Using a Different Edition of Microsoft SQL Server** You have the ability to view the status of and start the Pulse Service and RabbitMQ service. However, backups are not supported by Pulse. This is because the full versions of SQL provide administrators with several options for creating full database backups.



HOW TO BACKUP AND RESTORE DATABASES IN SQL SERVER

To learn how to backup and restore a database in SQL server, see the Microsoft SQL Server web site at:

» **For SQL Server 2008 R2** http://technet.microsoft.com/en-us/library/ms187048(v=sql.105).aspx

» **For SQL Server 2008** http://technet.microsoft.com/en-us/library/ms187048(v=sql.100).aspx

Importing Feedback Data

If your company previously used the MadCap Feedback product, you can import information from your existing Feedback database into the Pulse database.

WHAT GETS IMPORTED

The following describes what Feedback data is imported to the Pulse database:

- **Report Data** All of the report data.
- **Comments** All of the comments.
- **User Information** All of the user account information, except passwords.

> **Important:** Feedback users do not have passwords. Their email address will serve as both their user name and password (e.g., if you have a user with bob@example.com, his password will now be bob@example.-com). Users can change this password by clicking the **Forgot your password?** link in any Pulse Account Login page.

HOW TO IMPORT FEEDBACK DATA

1. Launch the Pulse server application.
2. Click **Import Feedback Data**.
3. In the Select SQL Server and Database dialog, complete the following:
   - **SQL Server** The computer name of the SQL server.
   - **Authentication** The authentication method.
   - **User name** The account username.
   - **Password** The account password.
   - **Database** The SQL Server instance.
4. Click **OK**.

Updating Pulse

You may periodically wish to check to see if there are updates for the Pulse server application to download.

HOW TO UPDATE PULSE

1. Launch the Pulse server application.
2. In the toolbar, select **Help>Check for Updates**.
3. In the dialog box that opens:
   - **No Updates Available** If not updates are available, simply click **Close**.
   - **Updates Available** If updates are available, highlight the update in the Download list. Then click **Download Updates**.

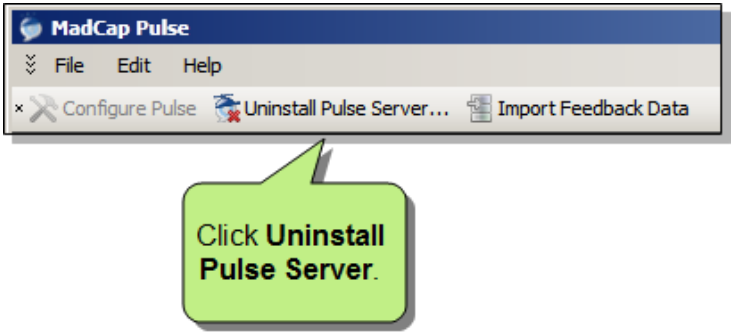
Uninstalling Pulse

You can uninstall the Pulse server and the application.

HOW TO UNINSTALL THE PULSE SERVER

When you use this method to remove Pulse, only the configuration information for the Pulse server is removed. The existing Pulse database remains untouched by this process. It also leaves the Pulse server application on the system, so you can reconfigure it at a later time.

1. Log in to the Pulse web server as an administrator.
2. Launch the Pulse server application.
3. In the toolbar, click the **Uninstall Pulse Server** button.



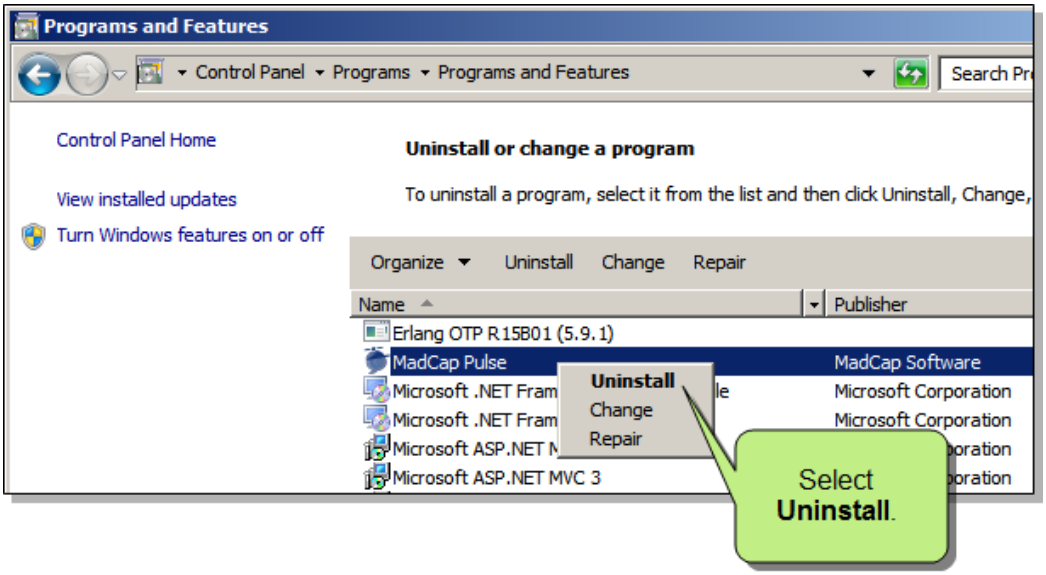
4. When prompted to decide if you want to proceed, click **Yes**. The system removes all of the Pulse server's configuration information.

The next time you launch Pulse, you will need to activate and configure the server for first-time use.

HOW TO UNINSTALL THE PULSE SERVER APPLICATION

If you want to completely remove the Pulse application from the server, use the Windows Control panel.

1. Log in to the Pulse web server as an administrator.
2. Open the Windows Control Panel.
3. Under **Programs**, click **Uninstall a Program**.
4. In the Uninstall or Change a Program page, right-click **MadCap Pulse** and select **Uninstall** from the context menu.



5. In the Programs and Features dialog, click **Yes**.
6. In the MadCap Pulse dialog, a list of applications related to Pulse appears. Review the list and select **Automatically close applications and attempt to restart them after setup is complete**. Then click **OK**. Windows begins removing the Pulse server application.

Integrating Flare and Pulse

To integrate the embedded discussion forms and other Pulse features with your Flare output, add a new community in Flare. This action automatically creates a new system in Pulse, allowing your web server to host, store, and serve the embedded discussion forms that appear below the topics in your Flare output. This system also gives you and your team members the ability to moderate and administer the Pulse features and content from the Pulse dashboard.

Integration Options

If you are developing an online Flare target for a single product, service, or purpose, integrating Flare is a straightforward process. You simply install Pulse and then add a new Flare community to create a corresponding system in Pulse. However, because many organizations develop multiple Flare targets, you also have these options:

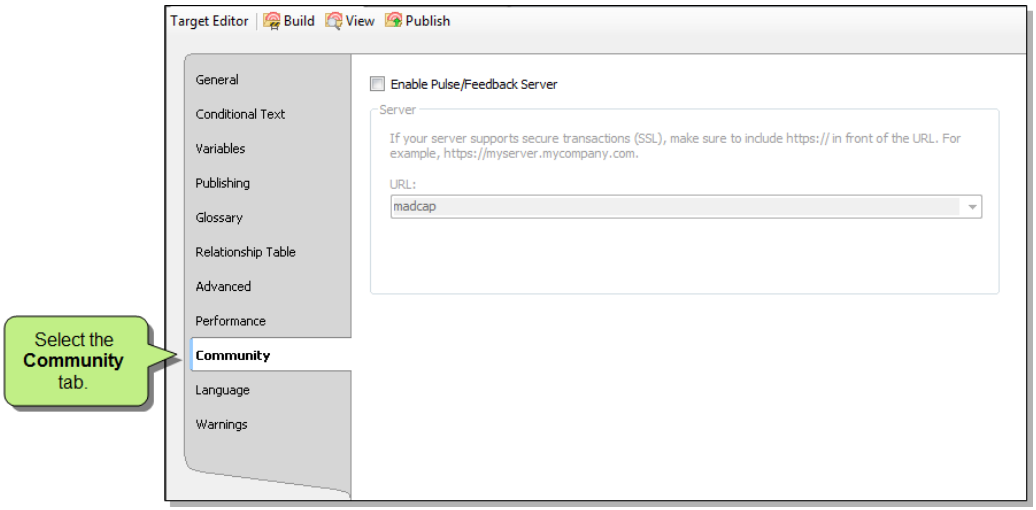
- **Add a Single Flare Community for Use With Multiple Targets** In this scenario, you add one Flare community which creates a corresponding Pulse system. Then you associate that community with multiple Flare targets. This method gives you less-granular reporting capabilities in Pulse.
- **Add a Unique Flare Community for Each Different Target** In this scenario, you add a unique Flare community for each different target. This creates a separate system in Pulse. The advantage of using this option is that it gives you more granular reporting capabilities, letting you generate usage reports for each community.

Enabling the Pulse Server

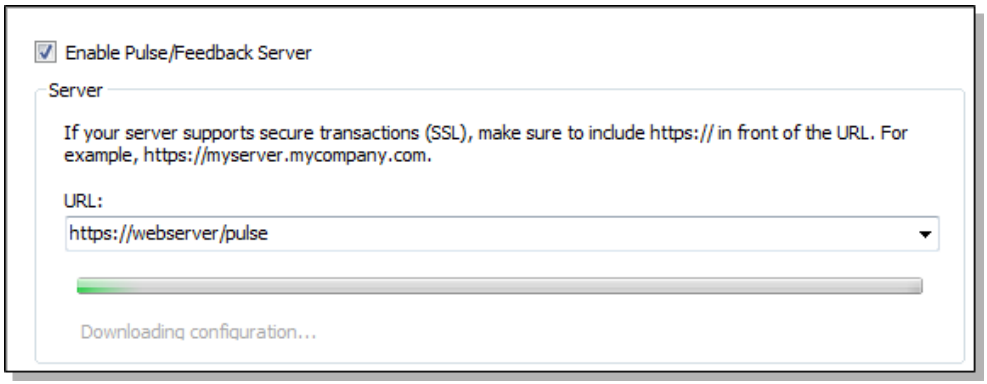
To give Flare the ability to interact with Pulse, you must supply the Flare community in the target with the appropriate connection information and administrative access credentials for the Pulse web server.

HOW TO ENABLE THE PULSE SERVER

1. Open the desired Flare project.
2. In the Project Organizer, open the desired WebHelp or HTML5 target.
3. In the Target Editor, select the **Community** tab.



4. Enable the server as follows:
   a. At the top of the **Community** tab, place a check mark in the **Enable Pulse/Feedback Server** box.
   b. In the **URL** field, type the URL for the Pulse web server.



Note: To find the URL, log in to the Pulse Dashboard as an administrator. Then select **Administration>Settings>General Settings**. The URL above corresponds to the value in the **Site URL** box.

Note: If you have installed a Secure Sockets Layer (SSL) certificate on the Pulse web server, ensure that the URL starts with the https:// protocol (instead of http://). See "Pulse System Requirements" on page 11.

c. Enter the access credentials as appropriate:

   - If this is the first time you are enabling the Pulse community in the Flare target, the Log In dialog automatically appears.

     OR

   - If you want to change the existing login information, click the **Logout** button to clear the existing credentials. Then click **Login**. The Log In dialog appears.

d. In the Log In dialog, type the appropriate **User name** and **Password**. The account that you use must have administrative permissions to Pulse. You have these options:

   - **Use the PulseAdmin Account** This is the default administrator account that was created by the person who installed Pulse.

» **Use an Account that is a Member of the Administrators Group** This can be any account belonging to a registered Pulse user who is a member of the Administrators group.

e. Click **OK** or press **Enter** to close the Log In dialog.

f. Before you can save the Flare target, you must associate a Flare community with the Pulse system.

Setting Up the Community in Flare

After enabling the Pulse server in the desired target, you can set up the community in Flare. If you are setting up Flare for the first time, you will add a new Flare community.

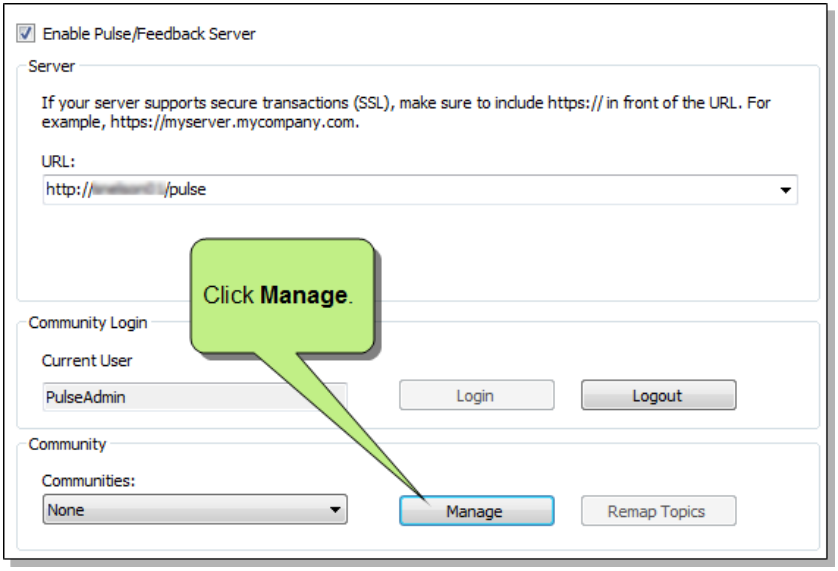
HOW TO ADD A NEW FLARE COMMUNITY

If this is the first time you are integrating Flare andPulse, add a new Flare community to your project's Flare target. This process automatically creates a new "system" on the Pulse server. In Pulse, a system hosts the following items:

- The activity streams that are used when moderating your topics with the Pulse dashboard
- The embedded discussion forms that registered Pulse users can access in the Flare output

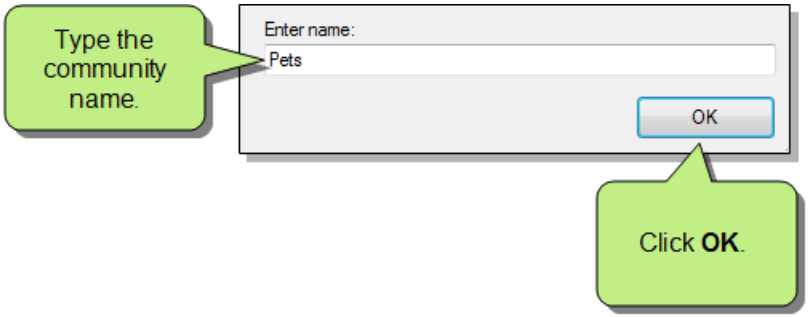
Important: To integrate Flare content with Pulse integration, you must always add new or use existing communities in Flare. While you have the ability to create systems using the Pulse dashboard, you do not have the ability integrate those systems with a Flare community.

1. In the **Community** tab, locate the **Communities** list and then click **Manage**.

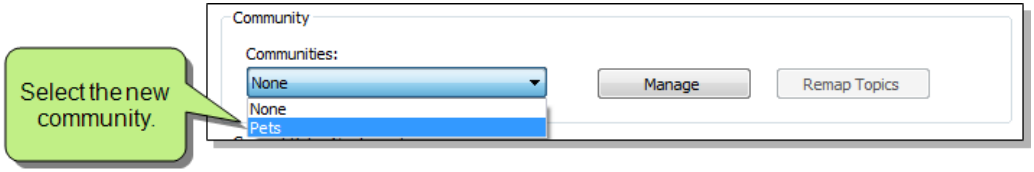


2. In the Manage Community dialog, click **Add**.

3. In the Enter Name dialog, type a name for your community. In this example, we are creating a community to use with a Flare target about Pets. Then click **OK**.



4. In the Manage Communities dialog, the new community appears. Click **OK** to close the dialog.
5. In the **Community** tab, select the community you just created from the **Communities** drop-down list.



6. Click **Refresh** to update the Current Pulse Configuration info. This provides you with basic information about the community, such as the status of the server, and the total number of users.

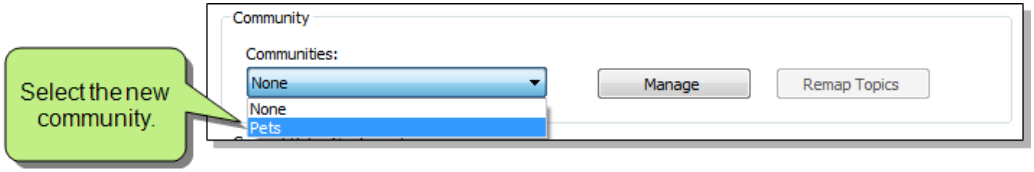
After the community is associated with the Flare target, the **Remap Topics** button becomes available so you can map your community topics to Pulse for the first time.

If needed, you can also have the ability to select an existing community, delete a community, and rename a community as follows:

HOW TO SELECT AN EXISTING FLARE COMMUNITY

If you need to publish any updates for your Flare output and do not wish to create a new community for your documentation release, select the community that you previously created for the target. This gives you the ability to ensure that any new, removed, and updated topics are mapped to the appropriate embedded discussion forms in the Pulse system.

1. In the **Community** tab, locate the **Community** area.
2. From the **Communities** list, select an existing community.



3. Click **Refresh** to update the Current Pulse Configuration info. This provides you with basic information about the community, such as the status of the server, and the total number of users.

Note: The Communities list in Flare initially only includes communities that have been added with the Flare user interface. If you create Pulse systems using the Pulse dashboard, those systems will be not be listed as Flare communities until you remap the topics.

Note: You can associate multiple Flare targets with a single community if desired. However, for best results with reporting, we recommend that you create a separate community for each target. This will also simplify any mapping/remapping tasks when you publish updates.

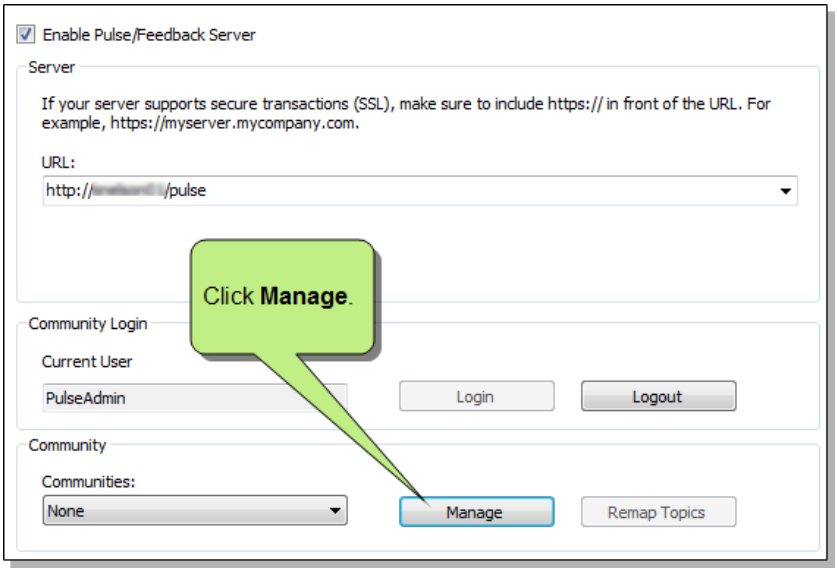
Note: If you want to verify that the Flare community you added is now a system in Pulse, log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group. The select **Systems>Find Systems** from the menu. The community you created will appear in the list.

After the community is activated, the **Remap Topics** button becomes available so you can remap the community topics to Pulse.

HOW TO DELETE A FLARE COMMUNITY

If you want to delete a Flare community, use the steps below. This deletes both the Flare community and the Pulse system.

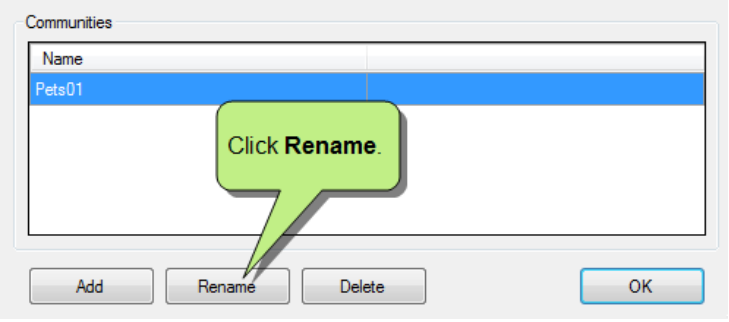
1. In the **Community** tab, locate the **Communities** list and click the **Manage**.



2. In the Manage Community dialog, select the community that you want to remove. Then click **Delete**.
3. When prompted to confirm the delete action, click **Yes**. This removes your selection from the Communities list.
4. Click **OK** to close the Manage Communities dialog.
5. Click **Remap Topics** and confirm the topics to remove.
6. Click to save your work.

HOW TO RENAME A FLARE COMMUNITY

1. In the **Community** tab, under **Current Pulse Configuration**, click the **Refresh** button.
2. Under the **Community** area, click the **Remap Topics** button ensure your topics have been mapped.
3. Under the **Community** area, click the **Manage** button.
4. In the Manage Community dialog, highlight the community that you want to rename. Then click **Rename**.



5. In the Enter Name dialog, type a new name for your community. Then click **OK**.

   This changes the name of the community in Flare, as well as the name of its corresponding Pulse system.

   Note: If an error message appears, try clicking the **Refresh** button and the remapping the topics. This typically resolves any issues.

6. Click **OK** to close the Manage Communities dialog.
7. Click to save your work.

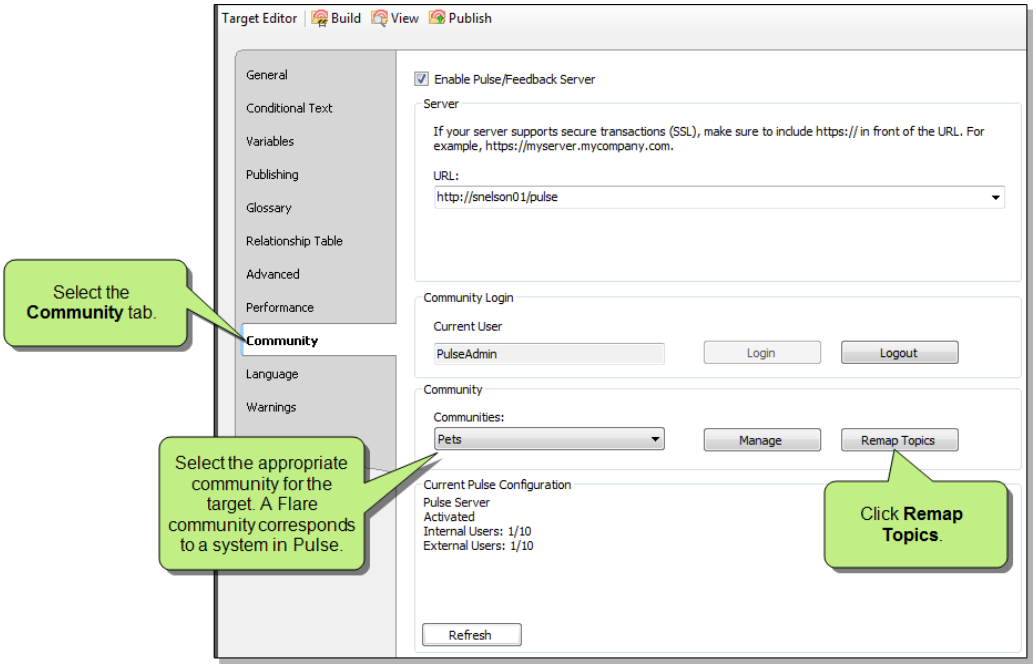
Mapping/Remapping a Flare Community to Pulse

In order to add the embedded discussion forms to the Flare output that you will publish, you must map/remap the community topics in Flare for Pulse.

HOW TO MAP A NEW FLARE COMMUNITY TO A PULSE SYSTEM

If this is the first time you are setting up a Flare community for a target, you will need to map the topics for your community to Pulse.

1. Make the desired changes to your Flare target. Always be sure to update the TOC before remapping the topics.
2. In the Target Editor, select the **Community** tab.
3. From the **Communities** drop-down list, select the appropriate community.
2. Click **Remap Topics**.

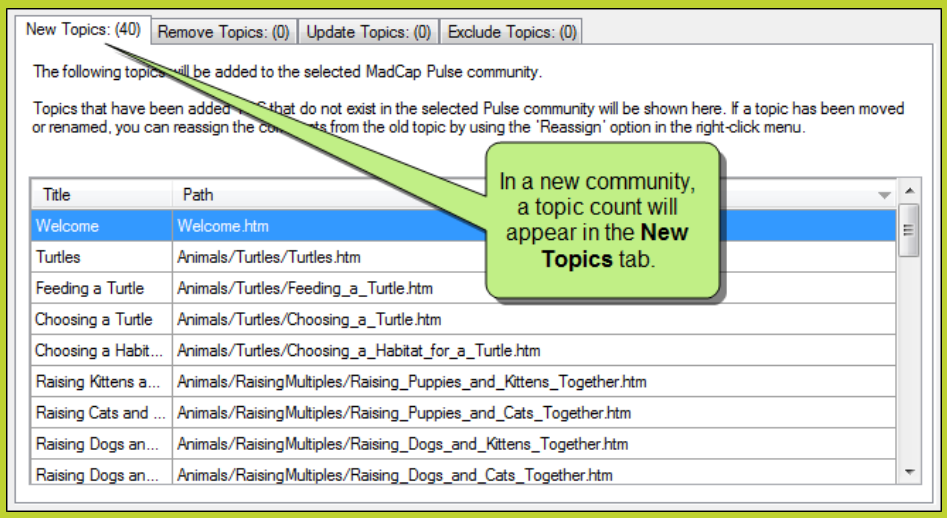


This opens the Remap Community Topics dialog.

3. In the Remap Community Topis dialog, make sure the **New Topics** tab is selected and review the topics in the list.

E X A M P L E

A topic count appears in the label of the **New Topics** tab. The tab lists the topic titles and paths to the topics. These items will be mapped to a corresponding stream in Pulse. In a new community, the counts in the other tabs will typically be zero (0).



4. When finished, click **OK**. The system automatically maps each community to a stream in Pulse. The community updated message appears.

5. Click to save your work.

HOW TO REMAP A FLARE COMMUNITY TO AN EXISTING PULSE SYSTEM

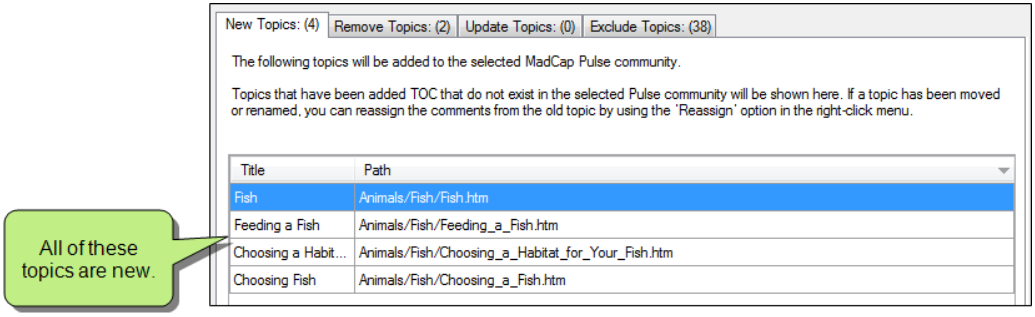
As you prepare to publish content updates to a Flare target, you can review the new, removed, and updated topics and then reassign any of the topics to the appropriate stream in the Pulse system. This stream corresponds to the embedded discussion form at the bottom of the Flare topic.

1. Make your content changes in Flare. Be sure to make all of the desired updates in the Flare TOC associated with your target.
2. Open the Flare target.
3. In the Target Editor, select the **Community** tab.
4. From the **Communities** drop-down list, select the appropriate community.
5. Click **Remap Topics**. This opens the Remap Community Topics dialog so you can review the updates:

   NEW TOPICS TAB

   The New Topics tab lists Flare updates that have an effect on the Pulse mapping definitions:

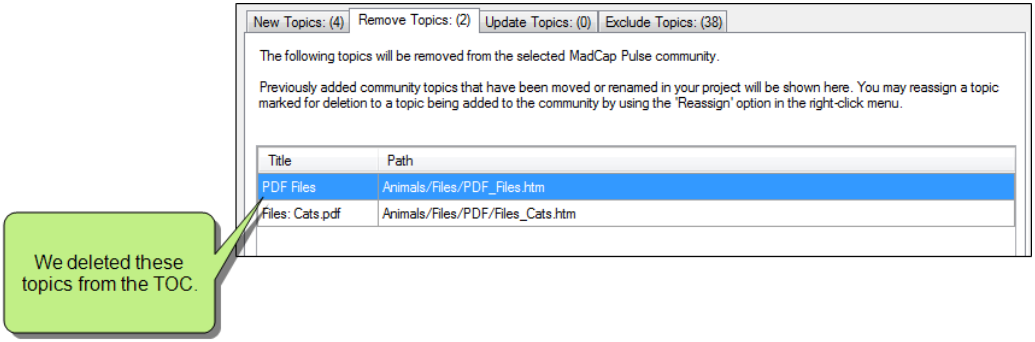
   - **New Topics** New topics that have been added to the Flare TOC associated with the target.
   - **Moved Topics** Existing topics that have been moved to a different folder or location in the Content Explorer.
   - **Renamed Topics (New Name)** Existing topics where the actual file name has changed. The new file name appears in this tab.



REMOVE TOPICS TAB

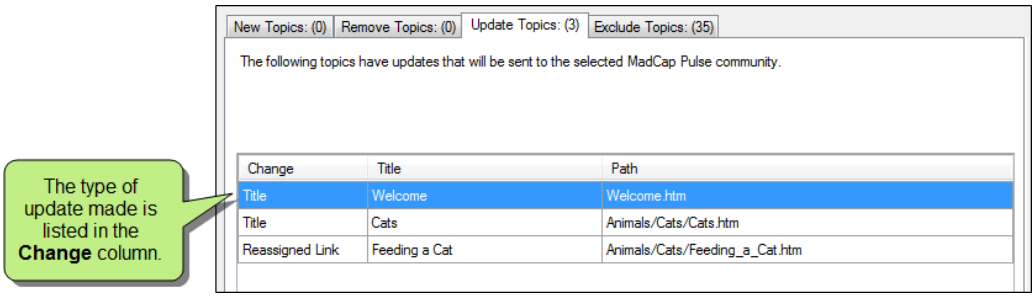
The Remove Topics tab lists Flare updates that have an effect on the Pulse mapping definitions:

- **Deleted Topics** Topics that have been removed from the Flare TOC associated with the target.
- **Moved Topics** Existing topics that have been moved to a different folder or location in the Content Explorer.
- **Renamed Topics (Former Name)** Existing topics where the file name has changed. The former file name appears in this tab.



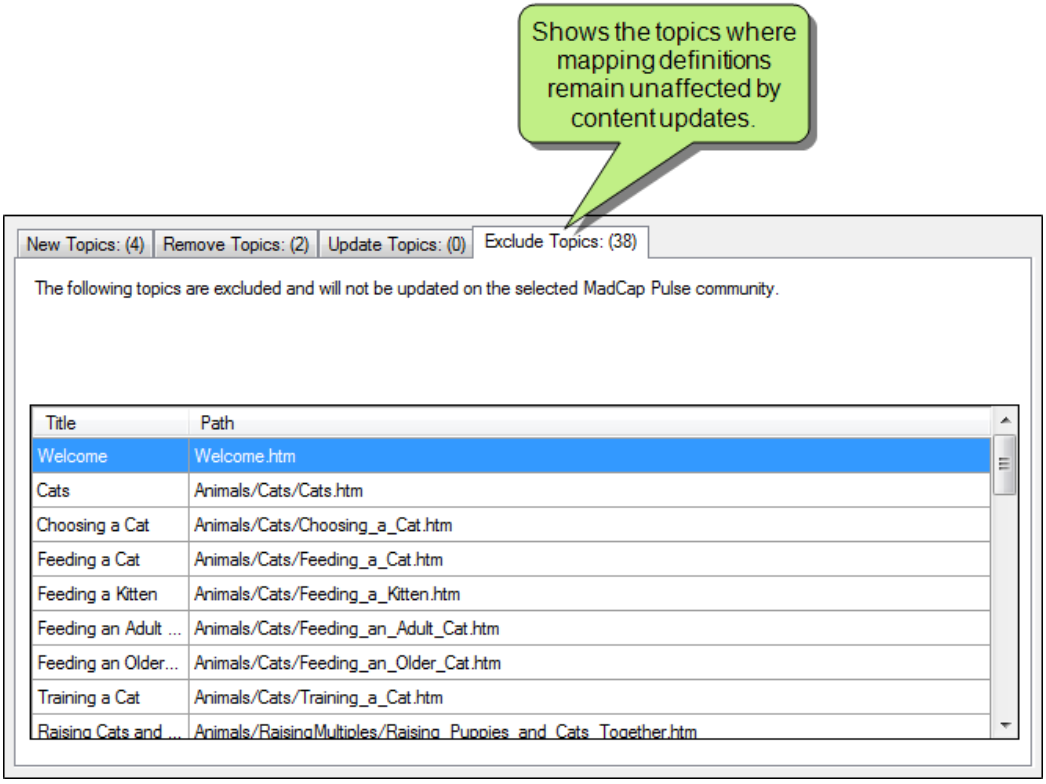
UPDATE TOPICS TAB

The Update Topics tab only lists community topic updates that specifically relate to Pulse mapping definitions. This includes topic updates such as title changes, reassigned links, and so on.



EXCLUDE TOPICS TAB

The Exclude Topics tab lists all topic files where Flare changes have no effect on the Pulse mapping definitions.



6. Review the topics in each tab and then reassign the links as desired. See below for instructions,
7. When finished, click **OK**. The community updated message appears.

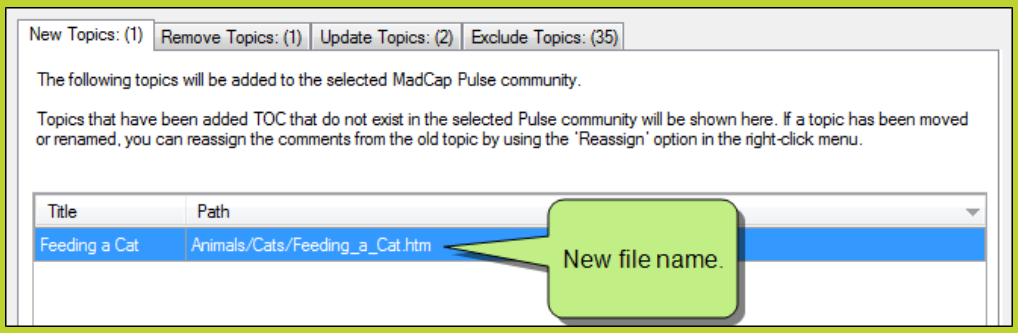
HOW TO REASSIGN A LINK

When you are preparing to publish content updates for aFlare target, there may occasionally be times when you want to reassign a link that is associated with a community topic. This lets you take the embedded discussion form associated with a topic and associate it with a different topic.

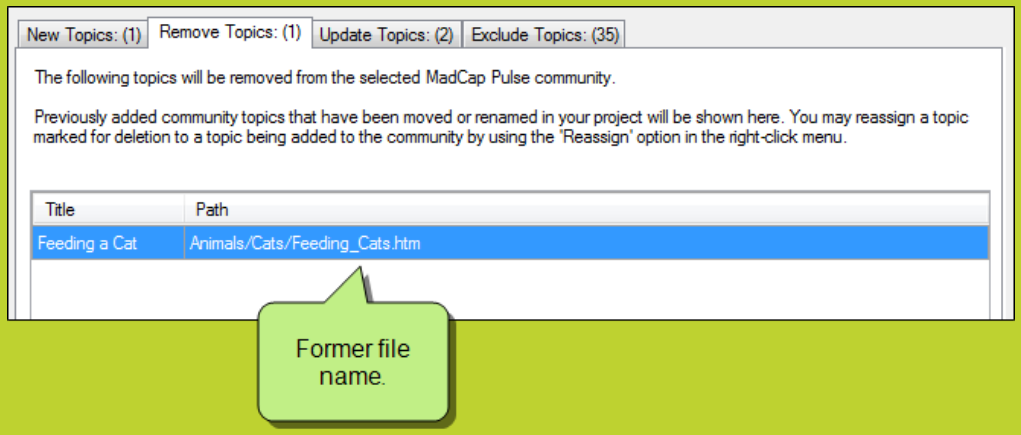
E X A M P L E

Let's say you have a topic with the file name, "Feeding_Cats.htm" and you decide to rename it, "Feeding_a_Cat.htm." When you make this change, the Remap Community Topics dialog will list this change in two places.

The New Topics tab will shown the new topic file name. If you click **OK** in the dialog, the system would add a new stream for the topic in the Pulse system:



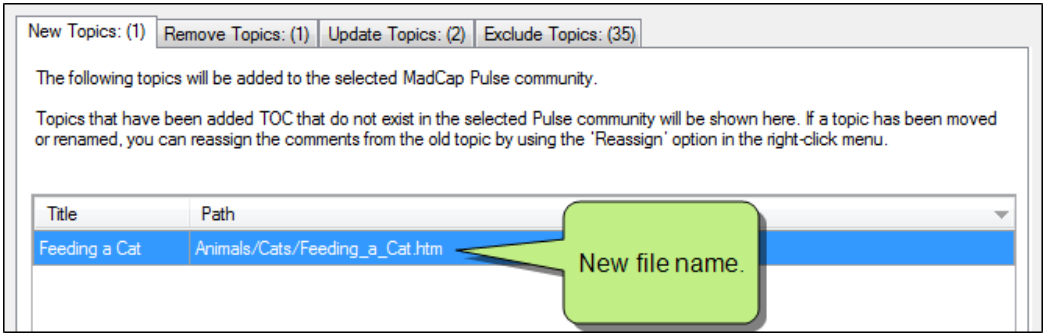
The Remove Topics tab will show the former file name. If you click **OK** in the dialog, the system would remove the corresponding stream for the topic in the Pulse system:



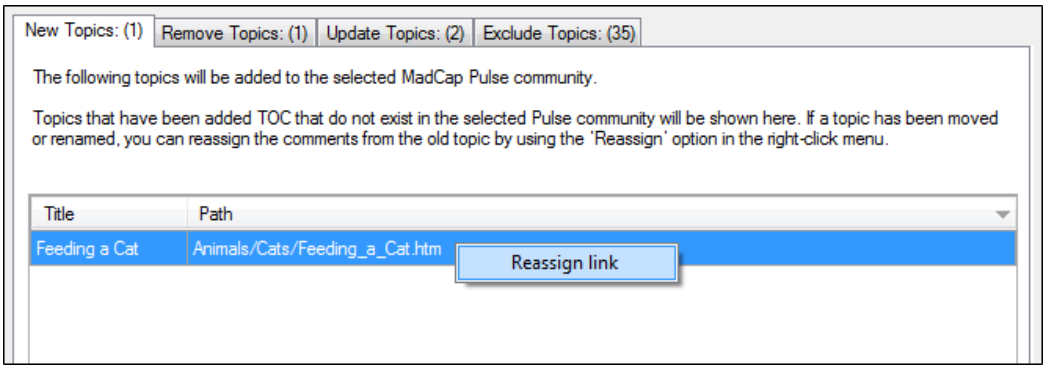
Instead of creating a new stream for the new topic named "Feeding_a_Cat.htm", let's say you want to keep the discussion from the existing stream associated with "Feeding_Cats.htm." You can reassign the link to tie the discussion with the old file name to the new file name.

HOW TO REASSIGN A LINK

1. Make your content changes in Flare. Be sure to make all of the desired updates in the Flare TOC associated with your target.
2. Open the Flare target.
3. In the Target Editor, select the **Community** tab.
4. Select the appropriate Flare community in the **Community** drop-down list.
5. Click **Remap Topics**. This opens the Remap Community Topics dialog so you can review the updates. In this example, we've renamed a topic file from "Feeding_Cats.htm" to "Feeding_a_Cat.htm."

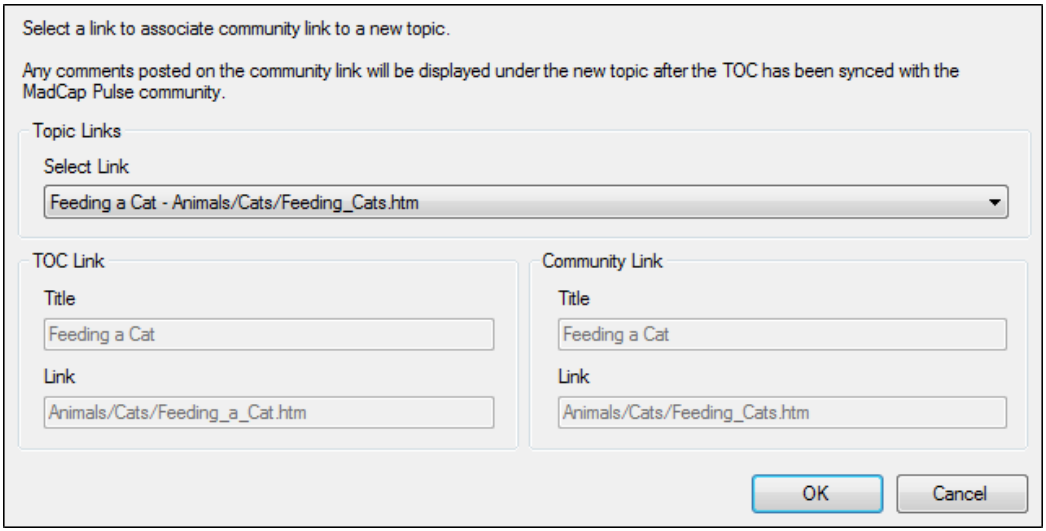


6. In the **New Topic** tab, right-click the new topic and select **Reassign Link** from the context menu.



This opens the Reassign Community Link dialog.

7. From the **Select Links** drop-down list, select the desired topic. This will map the embedded discussion form for the selected link with the topic. In this example, we will select the topic formerly named, "Feeding_Cats.htm."



8. When finished, click **OK**. The community updated message appears.

   When you republish your Flare target, the discussion originally linked to the former file is now linked to the new file.

HOW TO VERIFY THE COMMUNITY TOPICS IN THE PULSE SYSTEM

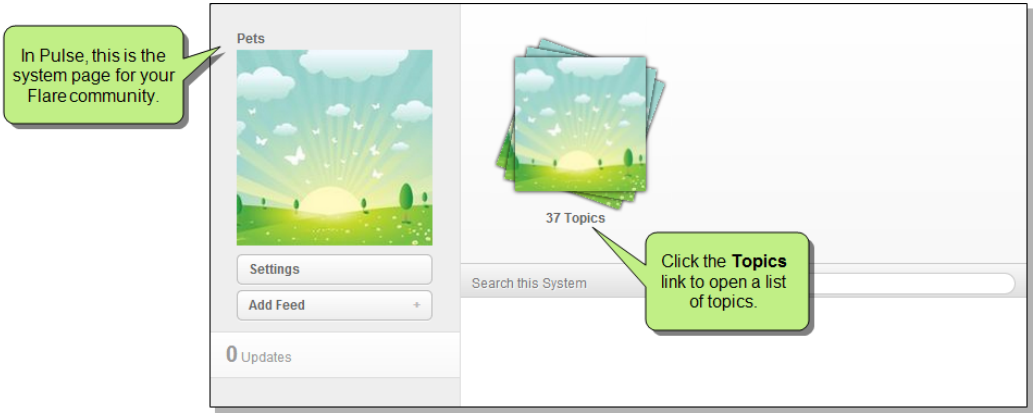
To see the community topics that have been created for your Flare output:

1. Log in to the Pulse dashboard with an appropriate user account.

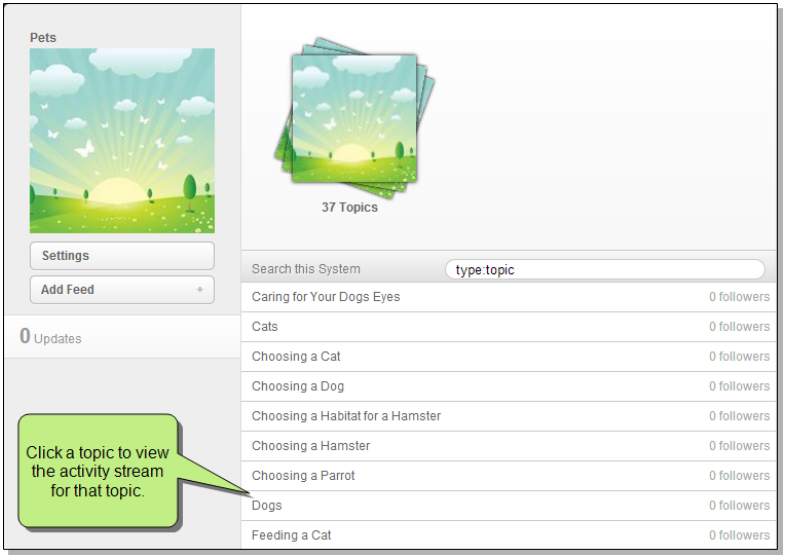
> **Note:** To access systems, the Pulse user account must be a member of the Administrators or Employees group.

2. In the menu bar, select **Systems>Find Systems**. The Find Systems page appears.
3. Under **New Systems**, click the Pulse system that corresponds to the appropriate Flare community.

4. In the community page, click the **Topics** link.

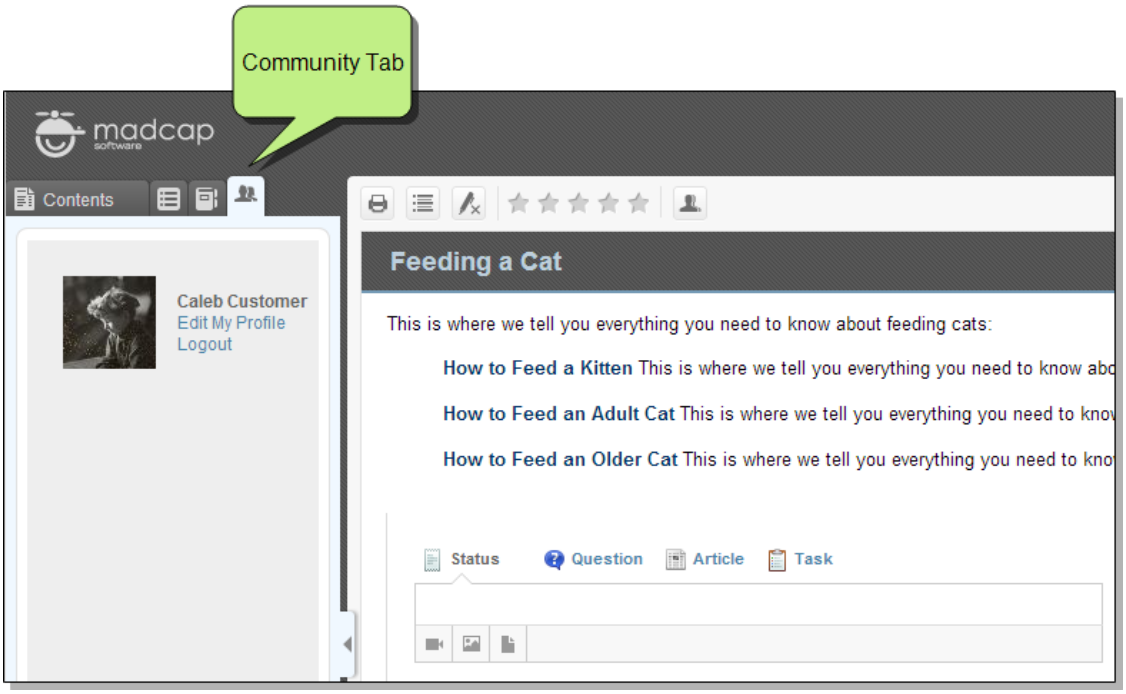


5. In the list of topics, click a topic. Any community activity for the topic will be reflected in the stream.



Enabling the Community Tab in the Output

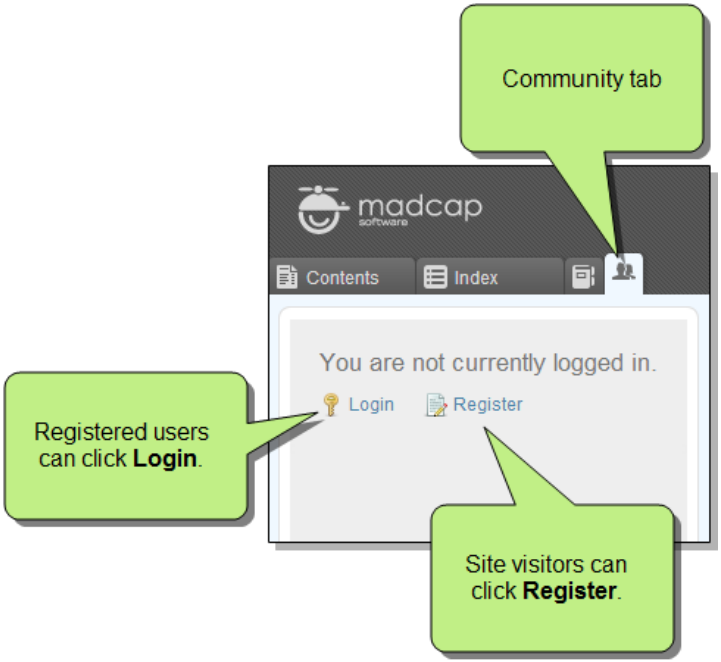
The final step in the integration process is to decide whether you want to include or exclude the Community tab with your published output. Below is an example of the Community tab:



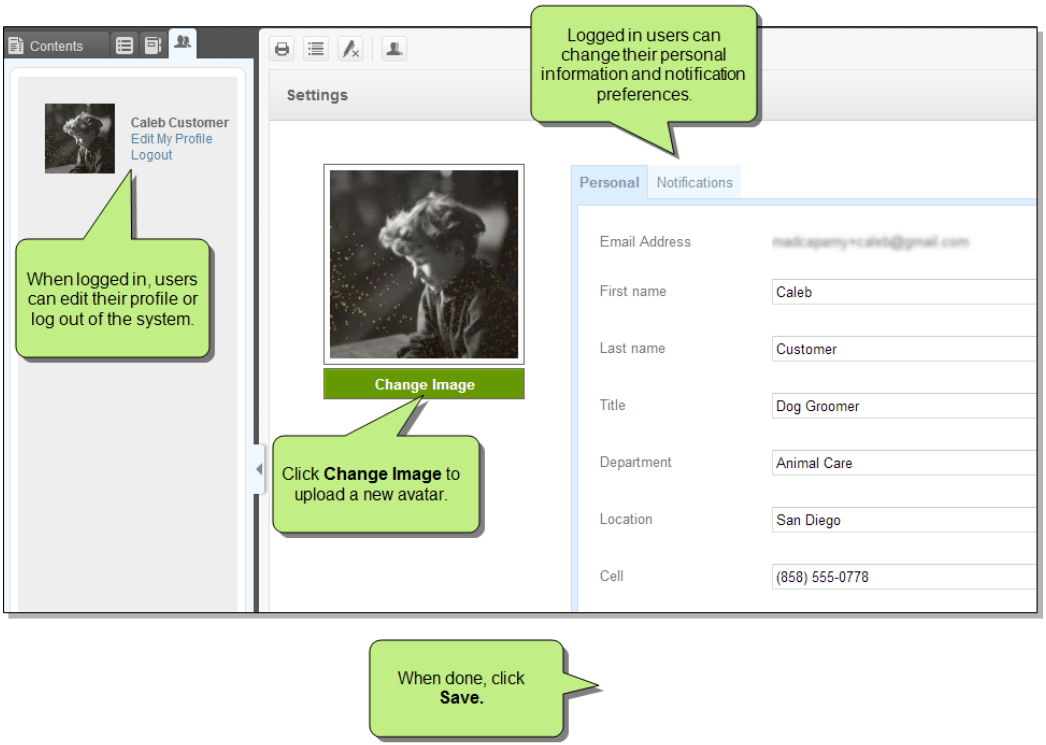
You can enable or disable this feature by editing the general features of the skin associated with the Flare target.

The benefits of including the Community tab in your output include:

» Gives site visitors the ability to register for a Pulse account. Also gives registered users the ability to log in to Pulse directly from the Flare output.



» Gives registered users the ability to edit their profile, which includes changing their avatar image, updating personal information, and modifying notification preferences.



Setting the Community Options for the Skin

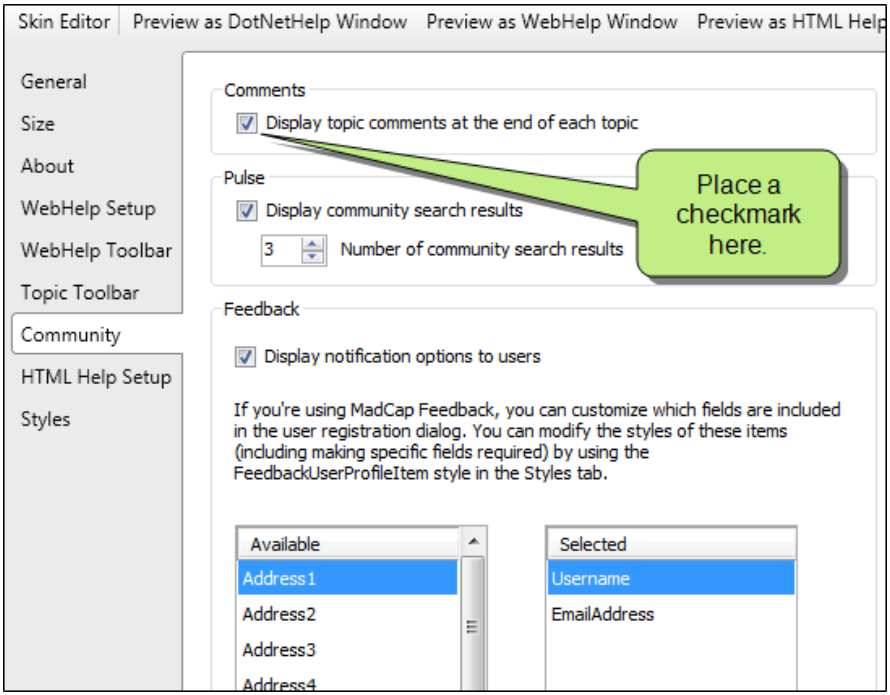
You can open a Standard or HTML5 skin and set community options.

HOW TO SET THE COMMUNITY OPTIONS FOR THE SKIN

1. In the Project Organizer, open a Standard or HTML5 skin.
2. In the Skin Editor, click the **Community** tab. You have these options:

   HOW TO DISPLAY TOPIC COMMENTS

   If you want registered Pulse users to have the ability to post comments in the embedded discussion forms that Pulse includes at the bottom of the Flare topics, place a check mark in the **Display topic comments at the end of each topic** check box. This check box is selected by default.

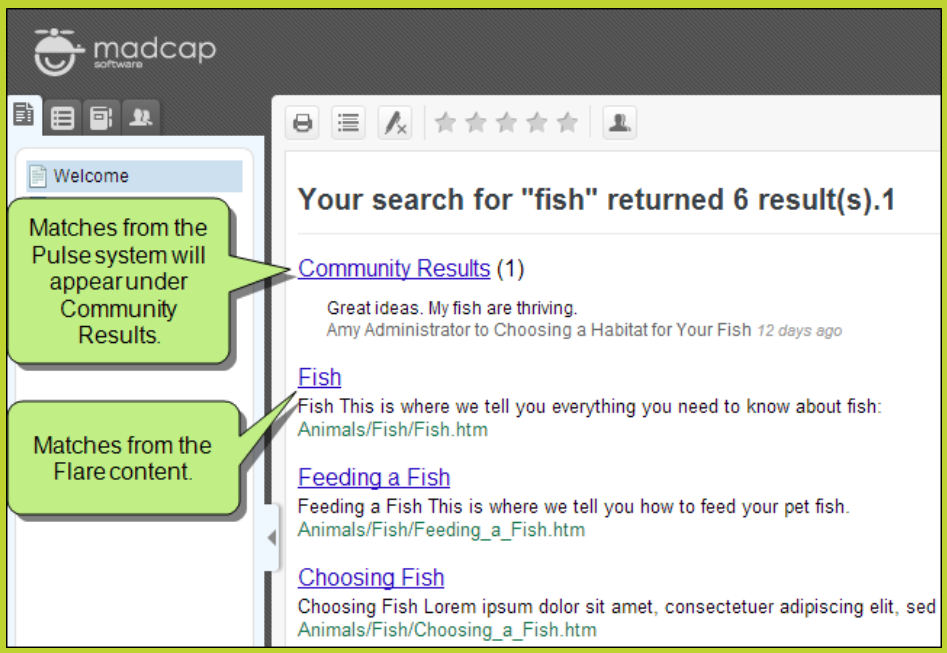


HOW TO DISPLAY COMMUNITY SEARCH RESULTS

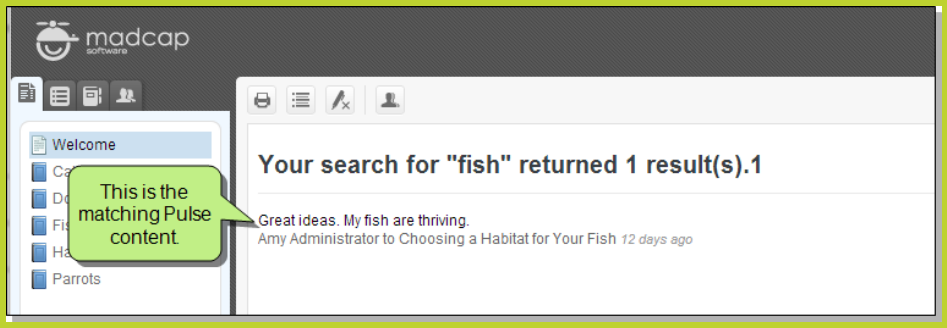
You can configure the Flare skin to give the Flare search engine the ability to index the Pulse system and return any community results when end users perform searches.

E X A M P L E S

In HTML5 output, Pulse posts matching the search query are listed on the Search Results page under a **Community Results** link:



If a user clicks the **Community Results** link shown above, only the matching Pulse content appears in the results page:



Users can then hover the mouse cursor over the content to reveal a links that open either the matching Pulsepost, the matching Flare topic and the matchingPulse post, or the Pulse user feed.

This feature works similarly in WebHelp output.

HOW TO DISPLAY SEARCH RESULTS

a. Open a Standard or HTML5 skin.

b. Click the **Community** tab.

c. Place a check mark in the **Display community search results** box.

d. (Optional) In the **Number of community search results** field, you can enter the number of community search results shown by default when a search is made in the output. The default number in this field is 3.

> **Note:** The Feedback area in the Community tab of the Skin Editor is only relevant to Feedback Server Admin. The Feedback option is not supported by Pulse.

3. Click to save your work.

Building and Publishing the Flare Output

Once you set up the community features, you can build and publish your Flare output.

Changing Expired Pulse Passwords

You can change Pulse passwords that have expired.

HOW TO CHANGE EXPIRED PULSE PASSWORDS

When you complete the authentication fields during installation, it is recommended that you use a password that does not expire. However, if necessary, you can later change an expired password via the Control Panel on your computer. Following are steps for doing this.

1. Open the Control Panel in an icon view, rather than Category view.
2. Select **Administrative Tools**.
3. Open the Internet Information Services (IIS) Manager.
4. Expand the node with the computer name.
5. Expand the **Sites** folder.
6. Expand the website folder corresponding to the one specified in the Pulse Admin.
7. To the right, double-click **Authentication**.
8. Right-click **Anonymous Authentication** and select **Edit**.
9. In the Edit Anonymous Authentication Credentials dialog, click **Set**.
10. In the Set Credentials dialog, change your password.

Pulse Installation Frequently Asked Questions

Following are some frequent questions about the Pulse installation and administration tasks.

General

Following are general frequently asked questions about the Pulse installation.

DO I HAVE TO HOST MY FLARE CONTENT ON THE PULSE WEB SERVER?

No. You can host the publishedFlareoutput on any server, computer, or location that has access to yourPulse web server.

DO I NEED A SEPARATE LICENSE CODE FOR EACH FLARE TARGET THAT I PUBLISH?

No. Each Flare target can be set up to have its own Pulse community. With Pulse, you can create an unlimited number of communities using the same license code.

HOW DO I INTEGRATE PULSE WITH MY FLARE CONTENT?

If you have installed Pulse, you can now open the Flare project and enable the Pulse features using the Community Tab in the Flare target. See "Integrating Flare and Pulse" on page 112.

Windows Installer

Following are frequently asked questions about the Windows installer.

WHAT VERSION OF WINDOWS INSTALLER DO I HAVE?

1. In the Windows Start menu, type `Run` in the **Search Programs and Files** box. Select **Run** from the Program menu to open the Run dialog.
2. In the Open box, type `system32`. Then, press **Enter** or click **OK**.
3. Locate the file named "msiexec.exe."
4. Right-click the file and select **Properties** from the context menu.
5. Click the **Details** tab.
6. In the field next to **Product Version**, ensure that your system is running Version 4.5 or higher. You should be running version 4.5.6001.22159 or greater. Most systems will be running version 5.0, which meets the minimum requirement.

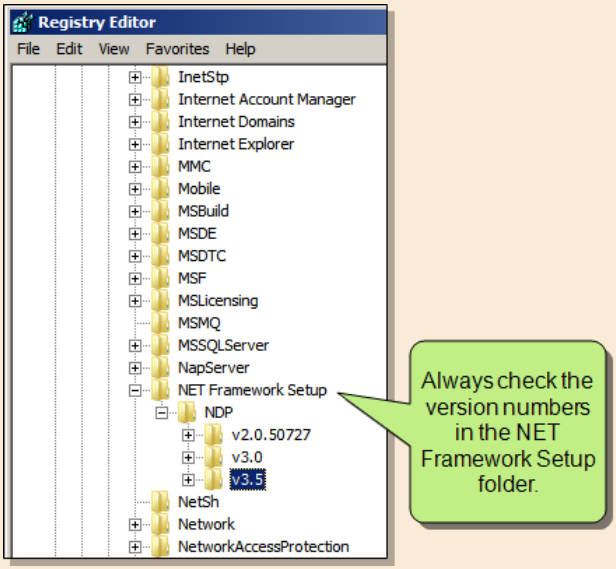
.NET Framework

Following are frequently asked questions about the .NET framework.

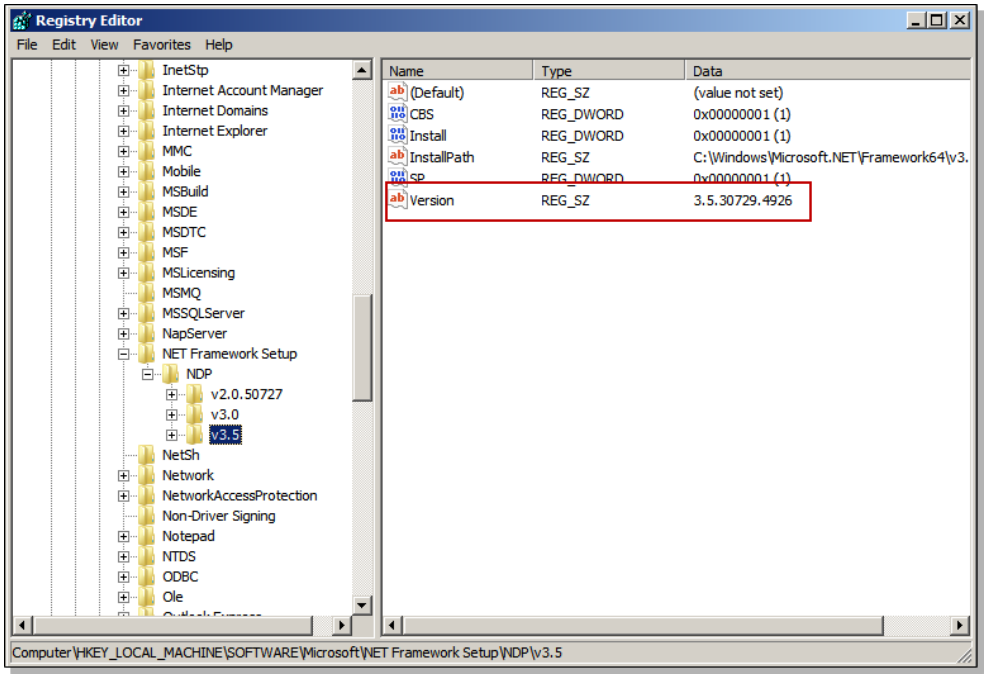
HOW DO I DETERMINE IF THE .NET FRAMEWORK IS ALREADY INSTALLED?

1. In the Windows Start menu, type `Run` in the **Search Programs and Files** box. Then select **Run** from the Program menu to open the Run dialog.
2. In the Open box, type `regedit.exe`. Then, press **Enter** or click **OK**.
3. If you are prompted by the following User Account Control message. Click **Yes** to open the Registry Editor.
4. In the Registry Editor, the following registry keys will be visible if the required versions are installed:

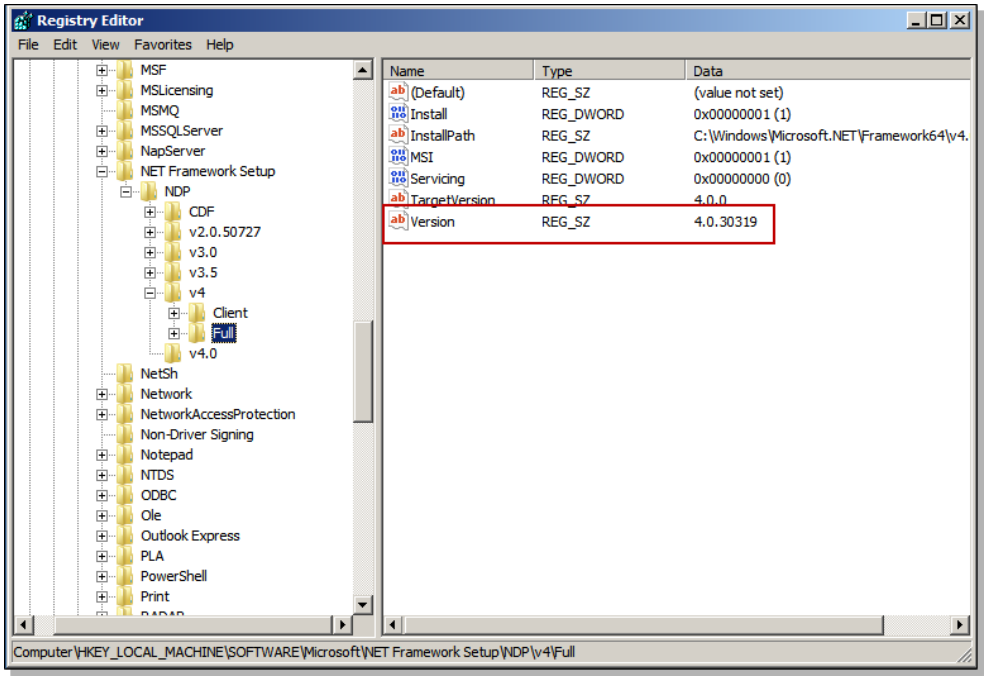
Important: When checking the information below, always make sure you are verifying the version numbers in the in "NET Framework Setup" directory and *not* the ".NET Framework" directory.



» **For Version 3.5.1 (Required by SQL Server)** HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v3.5



» **For Version 4.0 (Required by the Pulse Setup Program)** HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v4\Full



HOW DO I DOWNLOAD THE .NET FRAMEWORK?

If the required versions of the Microsoft .NET Framework are not installed on server, you can obtain the installation package and instructions below:

Version	Requirement	Instructions
Microsoft .NET Framework 3.5 Service Pack 1 (Full Package)	Required by Microsoft SQL Server	**On Windows Server 2008 R2** The .NET Framework features should already be on your system. Use the Windows Server Manager to install it. ***HOW TO INSTALL .NET FRAMEWORK 3.5.1 ON WINDOWS SERVER 2008 R2*** 1. Click the Windows **Start** menu, point to **Administrative Tools** and select **Server Manager**. 2. Under **Server Manager**, highlight **Features**. 3. In the Features Summary page, click **Add Features**. 4. In the Select Features page, place a check mark next to the **.NET Framework 3.5.1 Features** box. 5. Click **Add Required Features**. 6. In the Select Features box, click **Next**. 7. Review any informational messages. Click **Install**. A progress indicator shows you the status of the installation. 8. In the Installation Results page, look for the Installation Succeeded message. Then click **Close**. 9. Close the Server Manager. **On Windows Server 2008** Download the Full Package (instead of the bootstrapper version) using the instructions from Microsoft. ***HOW TO INSTALL .NET FRAMEWORK 3.5.1 ON WINDOWS SERVER 2008*** To download the Full Package installation: **http://www.microsoft.com/en-us/download/details.aspx?id=22** A link to the full package and instructions are available under the "Install Instructions" heading. After the installation, ensure that you also install these important .NET Framework updates: **http://support.microsoft.com/kb/959209** **http://www.microsoft.com/en-us/-download/details.aspx?id=22288**

Version	Requirement	Instructions
Microsoft .NET Framework 4.0 (Full Package)	Required by the Pulse Setup program	http://www.microsoft.com/en-us/download/details.aspx?id=17851

SHOULD I INSTALL THE FULL PACKAGE OR CLIENT PACKAGE?

You should always install the full package when working with server applications. The full framework provides a number of features and assemblies that are not available with the client package.

IIS

Following are frequently asked questions about IIS.

WHAT IS IIS 7.0?

Internet Information Services is a web service role that is enabled in Windows Server 2008 or Windows 2008 R2 to give the system its web server capabilities. IIS 7.0 (or 7.5) must be installed on the computer that will be acting as your Pulse web server.

HOW DO I DETERMINE IF IIS IS INSTALLED?

There are two ways to determine if IIS 7.0 is installed on a system:

INSTRUCTIONS FOR USING THE WINDOWS CONTROL PANEL

1. Open the Windows Control Panel.
2. Click **Programs**.Then under **Programs and Features** click **Turn Windows features on or off**.

   The Windows Features On or Off dialog appears.
3. Look for **Internet Information Services**.

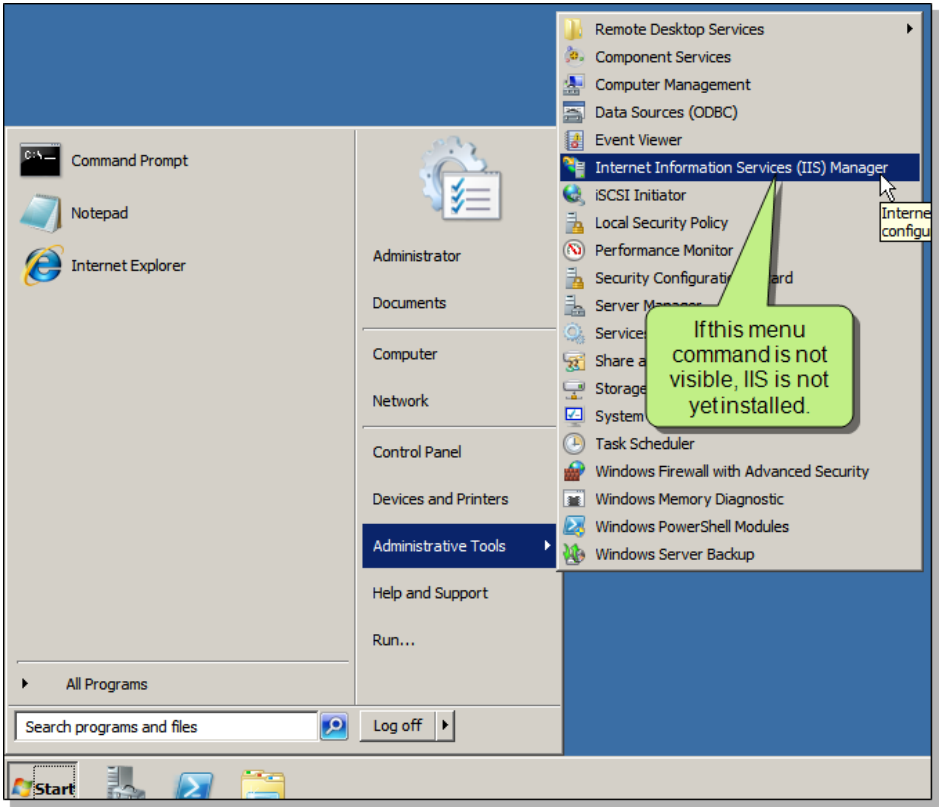
INSTRUCTIONS FOR USING RUN COMMAND

1. Open the **Start** menu and choose **Run**.
2. In the Run dialog, type `inetmgr` Then, press **Enter** or click **OK**.
3. If the Internet Information Services (IIS) Manager appears, the program is installed.

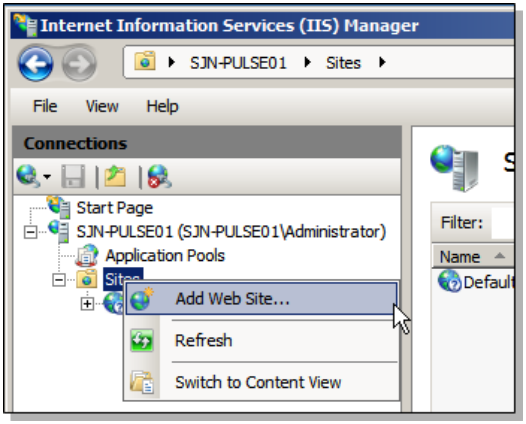
IIS IS ALREADY INSTALLED ON OUR SERVER. HOW DO I CREATE A NEW WEB SITE FOR PULSE IN IIS?

When you install IIS for the first time, a "Default Web Site" is automatically created in the \inetpub\wwwroot directory on the web server. You can either use this default directory to publish the Pulse content or you can create a new directory in the IIS file system by following these steps:

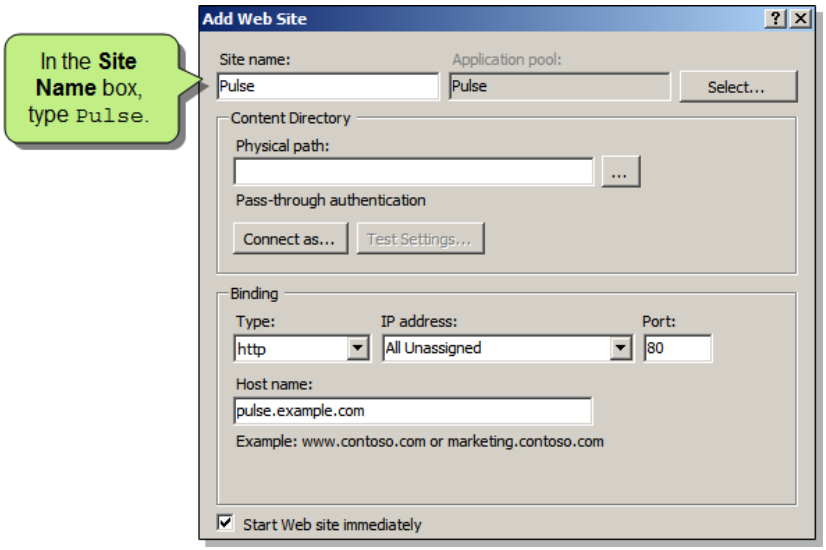
1. Click **Start>Administrative Tools** and select the **Internet Information Services (IIS) Manager**.



2. In the Connections pane, right-click the **Sites** container and select **Add Web Site**.



3. In the Add Web Site dialog, type a name for your Pulse site in the **Site name** box. For example, type `Pulse`.



4. In the **Application pool** box, make sure the desired application pool appears. In this example, the default application pool is named **Pulse**.

> **Note:** If you want to use a different application pool, click the **Select** button. Then, choose the desired Application pool from the list and click **OK**.

5. In the **Physical path** box, type the physical path to the folder that you want to use as your content directory for Pulse.

   In this example, we created this folder structure: `%SystemDrive%\pulsepub\wwwroot`.

6. From the **Type** list, select the desired protocol. In this example, we selected **http**.
7. In the **IP address** box, type a static IP address.
8. Type a port number in the **Port** text box. The default port number is `80`.
9. If you want to use a host name for your URL, enter it in the **Host name** box. In this example, we are using `pulse.example.com`.
10. If you do not have to make any changes to the site, and you want the web site to be immediately available, place a check mark in the **Start Web site immediately** box.
11. Click **OK**.

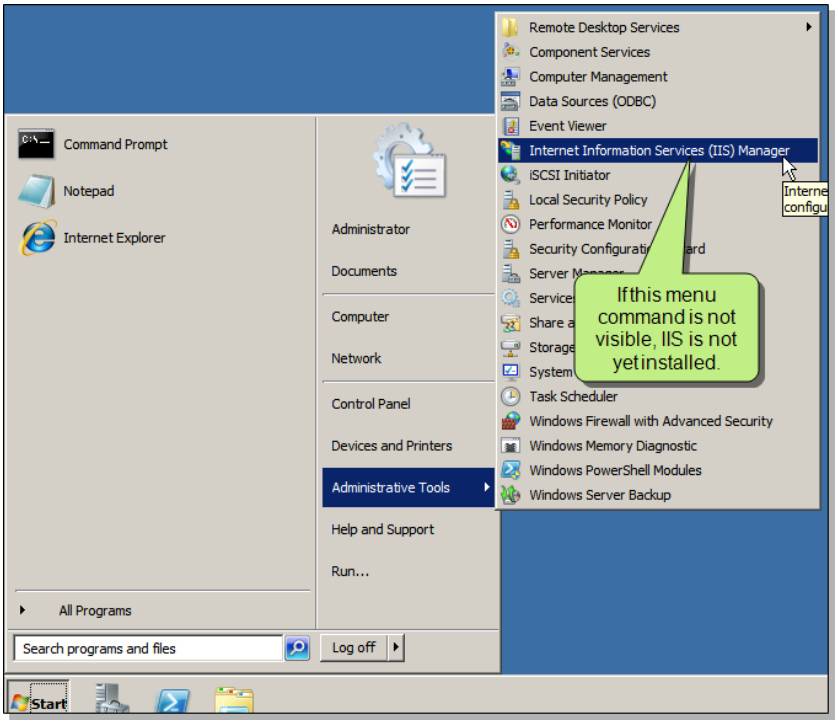
HOW DO I USE A HOST NAME FOR THE PULSE URL?

By default, the Default Web Site that Pulse uses to serve your dashboard content requires you type <localhost>/Pulse to gain access your dashboard content. However, you can change the localhost to a domain name, if desired.

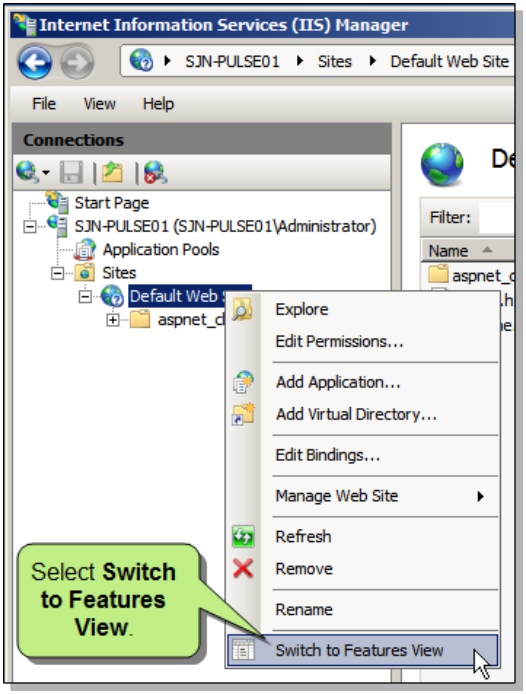
E X A M P L E

Let's say that to access your Pulse dashboard content users must type: `http://127.0.0.1/Pulse/` in the browser address bar. Using the steps below, you can change the host name to give users the ability to type: `http://pulse.example.com`.

1. Click **Start>Administrative Tools** and select the **Internet Information Services (IIS) Manager**.

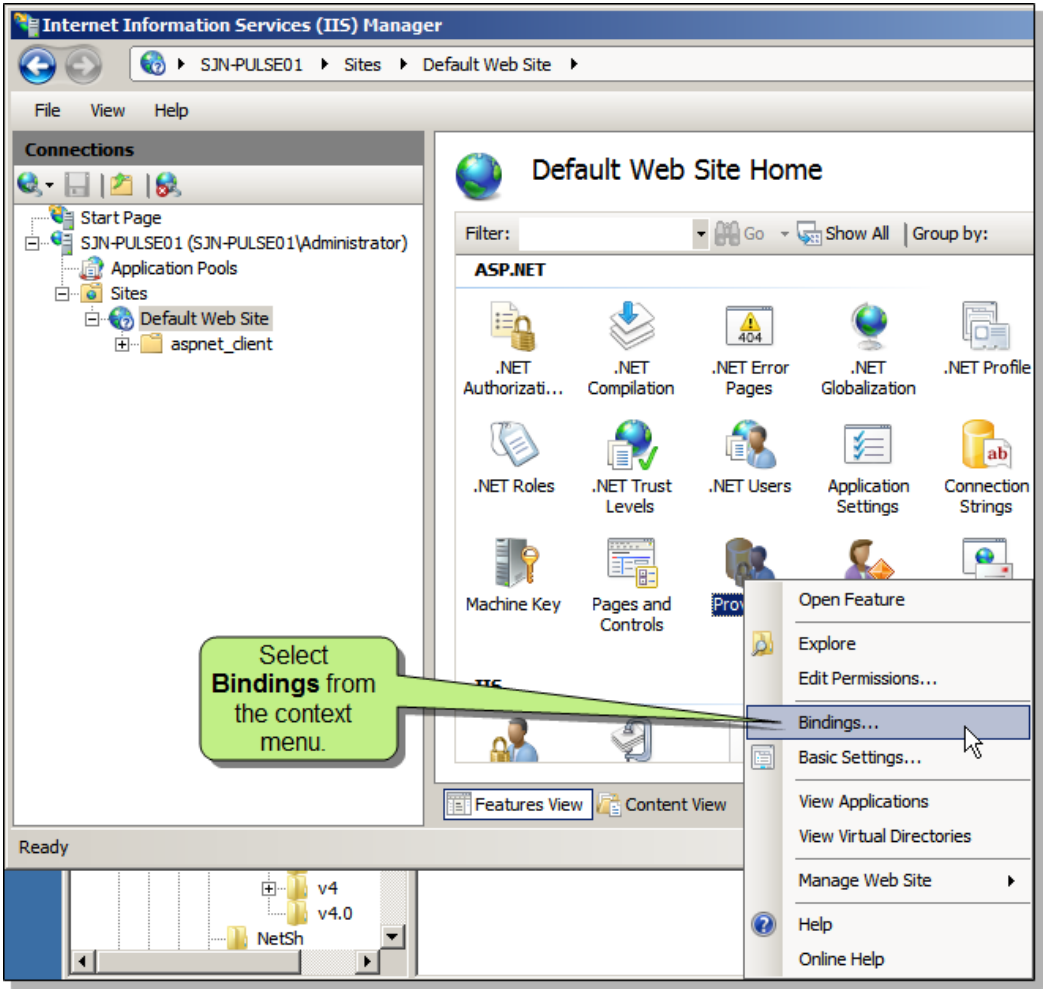


2. Right-click your Pulse web site and select **Switch to Features View** from the menu.

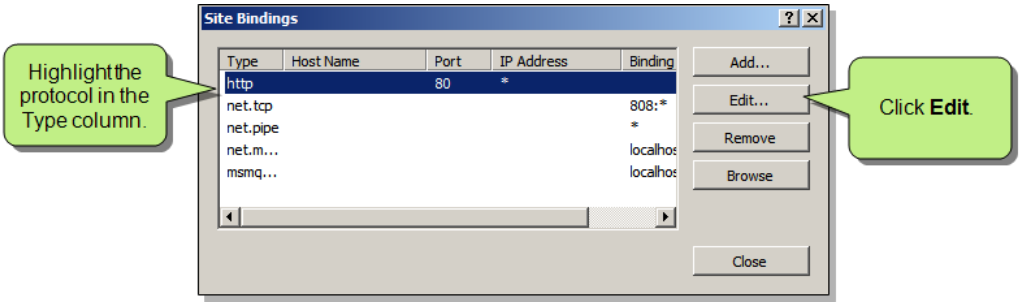


Note: In this example, we are using the Default Web Site for Pulse.

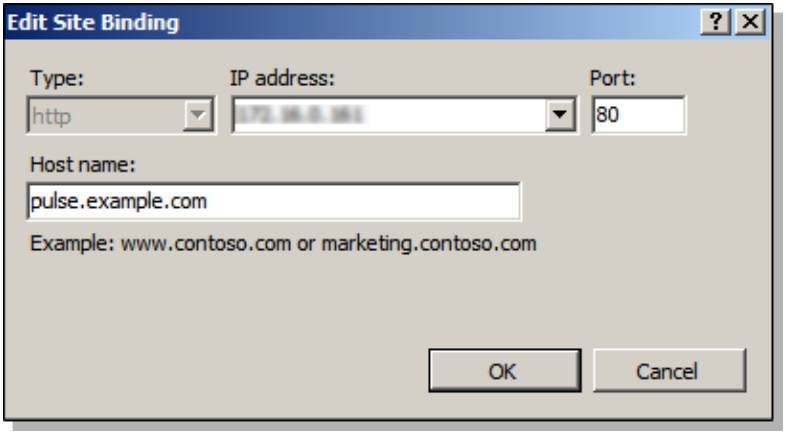
3. In Features View, under the **ASP.NET** area, right-click **Providers** and select **Bindings** from the context menu.



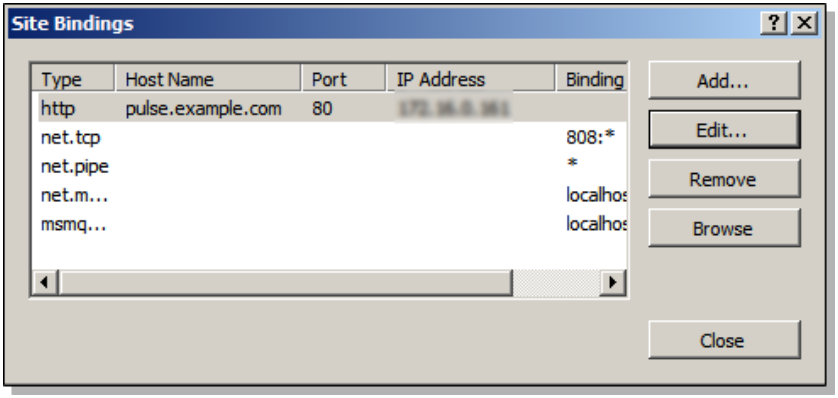
4. In the Site Bindings dialog, highlight the appropriate protocol. In this example, we highlighted the protocol **http** in the Type column. Then click **Edit**.



5. In the Edit Site Binding box, type the host name for your Pulse URL. For example, type: `pulse.example.com`. Then click **OK**.



6. In the Site Bindings dialog, click **Close**.



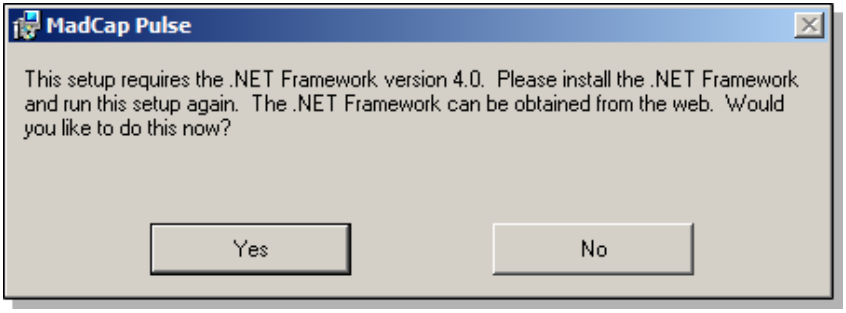
7. Select **File>Exit** to close IIS Manager.

Pulse Setup Program

Following are frequently asked questions about the Pulse setup program.

DO I INSTALL THE .NET FRAMEWORK 4.0 BEFORE PULSE?

Yes. The .NET Framework 4.0 is a prerequisite for the Pulse setup program. If you do not install the framework, the following notification message will appear when you attempt to run the Pulse setup program on the server:



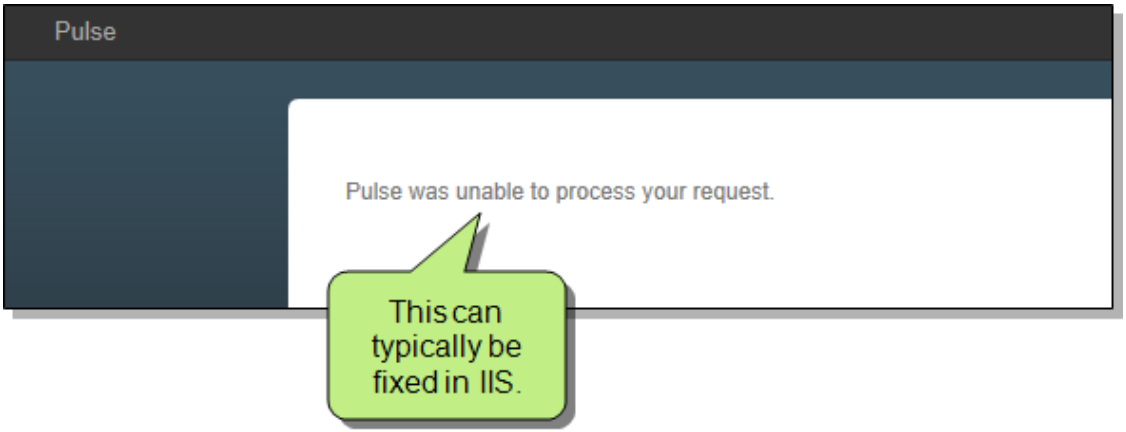
You should click **Yes** in the error message. This will direct you to the Microsoft .NET Framework 4 (Web Installer) page in a new browser window, so you can download and install the framework.

Pulse Server Application

Following are frequently asked questions about the Pulse server application.

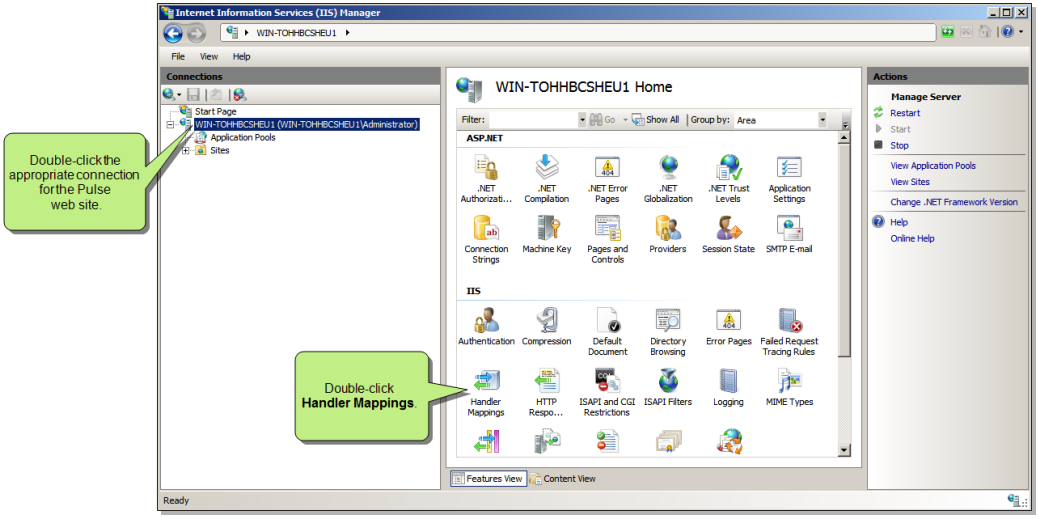
WHY AM I SEEING THE "PULSE WAS UNABLE TO PROCESS YOUR REQUEST" MESSAGE?

This message displays when you are attempting to log in to the Pulse Dashboard.

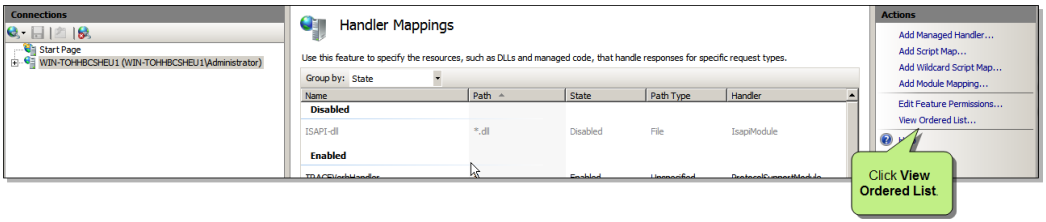


When this message appears, first try refreshing your browser content. If the message still appears, it typically means that IIS is not able to properly handle responses for the ExtensionlessURL resources. This can quickly be resolved in Internet Information Services (IIS) Manager.

1. Log in to the Pulse web server as an administrator.
2. Click **Start>Administrative Tools>Internet Information Services (IIS) Manager**.
3. In the left pane, double-click the appropriate connection. Then double click **Handler Mappings**.



4. In the Actions pane, click **View Ordered List**.



5. Look for these mappings in the **Name** column:
   - ExtensionlessUrl-ISAPI-4.0_32bit
   - ExtensionlessUrl-ISAPI-4.0_32bit
   - ExtensionlessURL-Integrated-4.0
6. Select each mapping individually. Then in the Actions pane, click **Move Down** until all of the mappings are near the bottom of the list, just above StaticFile.

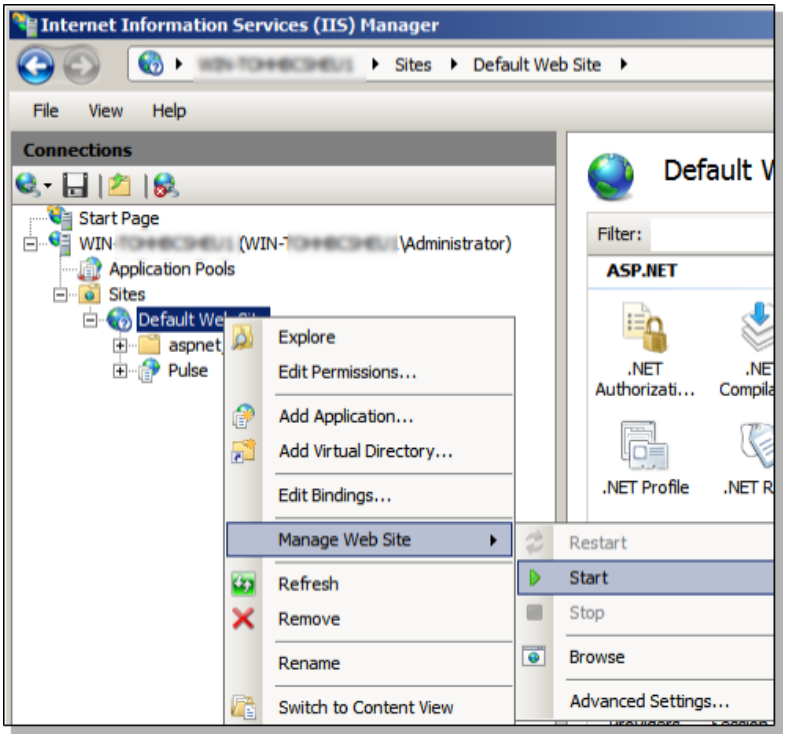
AXD-ISAPI-2.0	*.axd	Enabled	Unspecified
PageHandlerFactory-ISAPI-2.0	*.aspx	Enabled	Unspecified
SimpleHandlerFactory-ISAPI-2.0	*.ashx	Enabled	Unspecified
WebServiceHandlerFactory-ISAPI-2.0	*.asmx	Enabled	Unspecified
HttpRemotingHandlerFactory-rem-ISAPI-2.0	*.rem	Enabled	Unspecified
HttpRemotingHandlerFactory-soap-ISAPI-2.0	*.soap	Enabled	Unspecified
AXD-ISAPI-2.0-64	*.axd	Enabled	Unspecified
PageHandlerFactory-ISAPI-2.0-64	*.aspx	Enabled	Unspecified
SimpleHandlerFactory-ISAPI-2.0-64	*.ashx	Enabled	Unspecified
WebServiceHandlerFactory-ISAPI-2.0-64	*.asmx	Enabled	Unspecified
HttpRemotingHandlerFactory-rem-ISAPI-2.0-64	*.rem	Enabled	Unspecified
HttpRemotingHandlerFactory-soap-ISAPI-2.0-64	*.soap	Enabled	Unspecified
CGI-exe	*.exe	Disabled	File
TRACEVerbHandler	*	Enabled	Unspecified
OPTIONSVerbHandler	*	Enabled	Unspecified
ExtensionlessUrlHandler-ISAPI-4.0_32bit	*.	Enabled	Unspecified
ExtensionlessUrlHandler-ISAPI-4.0_64bit	*.	Enabled	Unspecified
ExtensionlessUrlHandler-Integrated-4.0	*.	Enabled	Unspecified
StaticFile	*	Enabled	File or Folder

7. Close the IIS Manager.

WHY AM I SEEING THE "WEB SITE TEST FAILED" MESSAGE?

If you encounter the "Web site test failed" message when testing your web site setting in the Pulse Server Configuration window, it is recommended that you first ensure your Pulse web site is running in IIS.

1. Log in to the Pulse web server as an administrator.
2. Click **Start>Administrative Tools>Internet Information Services (IIS) Manager**.
3. In the Connections pane on the left side of the window, expand the **Sites** container.
4. Locate your Pulse web site. In this example, the Pulse web site is the "Default Web Site."
5. Right-click the website and select **Manage Web Site>Start** from the context menu.



If your website is running successfully, we recommend returning to the Pulse Server Configuration window in the Pulse server application. Then, test your website settings again.

RabbitMQ

Following are frequently asked questions about RabbitMQ.

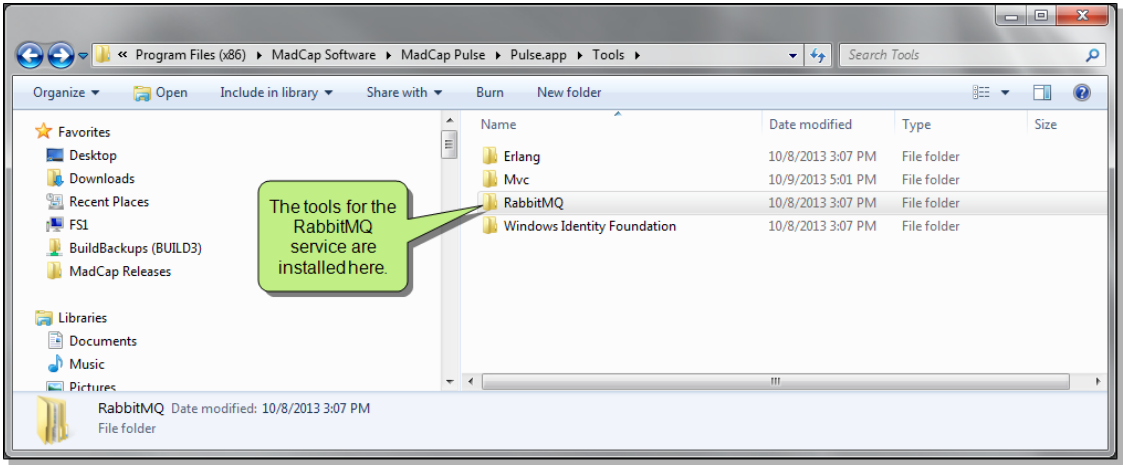
WHAT IS RABBITMQ?

The Pulse setup program installs a third-party tool, RabbitMQ. This runs as a Windows service and supports communication between the Pulse web server (IIS) and the SQL Server hosting your Pulse database.

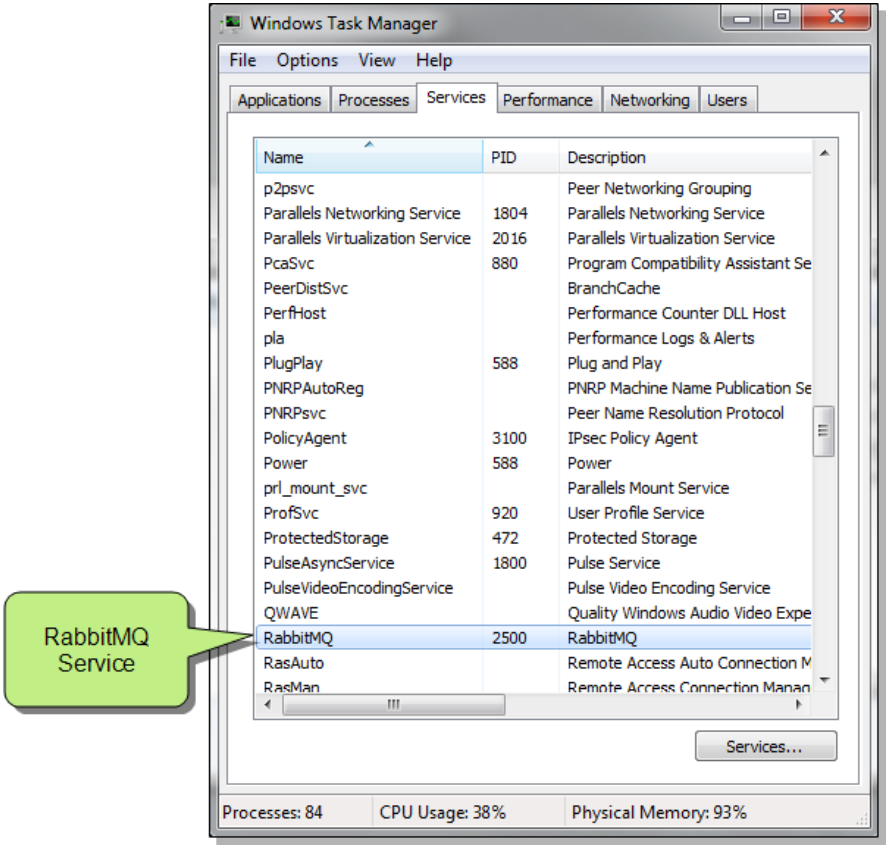
RabbitMQ monitors the amount of RAM on the server, to raise alarms and block connections until the alarm is cleared. This is helpful because it will assist you preventing the server from crashing should free disk space gets low.

WHERE IS THE RABBITMQ SERVICE INSTALLED?

The Pulse setup program installs the RabbitMQ tool at this path where Pulse is installed: C:\Program Files (x86)\MadCap Software\MadCap Pulse\Pulse.app\Tools. **Please note that this is just an example. Your files might be in different folder than C:\Program Files (x86).**



Once installed, Pulse runs the RabbitMQ tool as a Windows service:



User Administration

Following are frequently asked questions about user administration.

HOW DO I REMOVE A USER SO THEY CAN RE-USE THEIR EMAIL ADDRESS IN PULSE?

Deleting a Pulse user removes all access to Pulse and keeps the user information in the Pulse database. To give a user the ability to re-use the email address in Pulse, you must first delete the user from the dbo.Users and dbo.Login tables in SQL Server. Once the entries are deleted, the email can be used to create a new Pulse account.

CHAPTER 3

About the Pulse Dashboard

The Pulse dashboard is the web-based interface to the Pulse system. Depending on your group membership, authorized users can use the dashboard to configure a variety of server settings, administer users and groups, moderate the Pulse content associated with your Flare output, and access some basic end user features.

This chapter discusses the following:

Group Dashboards 164
Initial Dashboard Login for Administrators 167
Dashboard Structure 168
Using the Pulse Menu 176
Using the People Menu 181
Using the Groups Menu 182
Using the Tags Menu 197
Using the Systems Menu 209
Using the Administration Menu 220
Searching the Pulse Dashboard 277
Pulse Dashboard Frequently Asked Questions 278

Group Dashboards

The Pulse dashboard gives registered users the ability to view and gain access to different features based on the group membership of their user account. See "Managing Groups" on page 234.

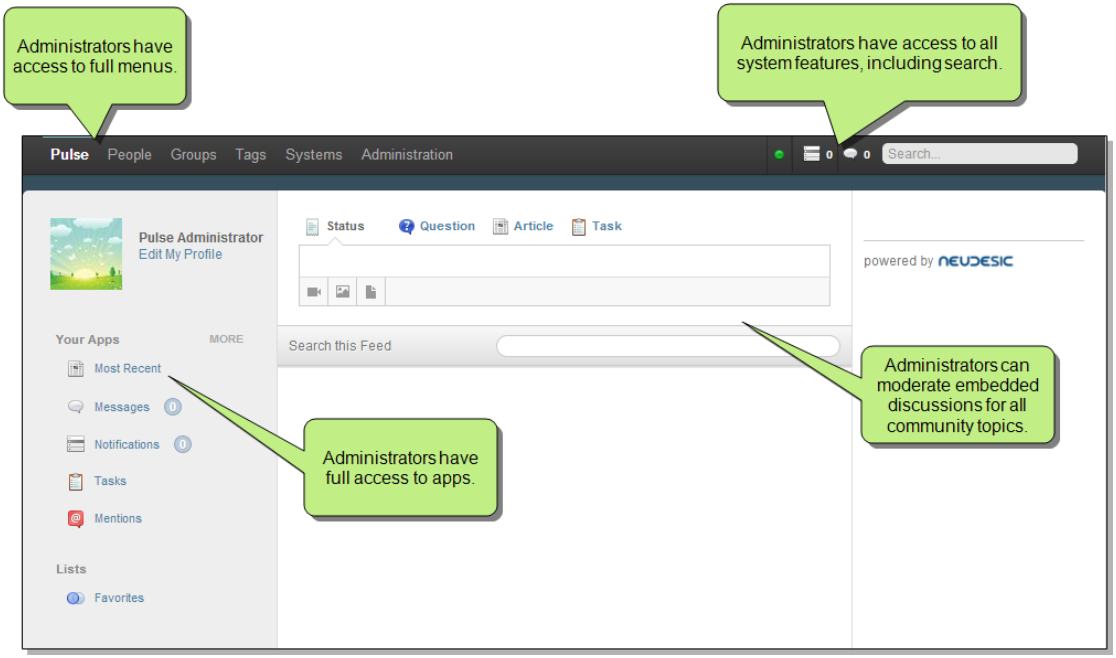
There are three levels of group access available:

ADMINISTRATOR DASHBOARD

Users who have been granted access privileges to the Administrator dashboard include:

- **PulseAdmin Account** This is the default PulseAdmin user account. It is created during the initial server configuration and the person configuring the server sets the password. See "Pulse Server Configuration" on page 89.
- **Members of the Administrators Group** Registered users who are members of the Administrators group. See "Managing Groups" on page 234.

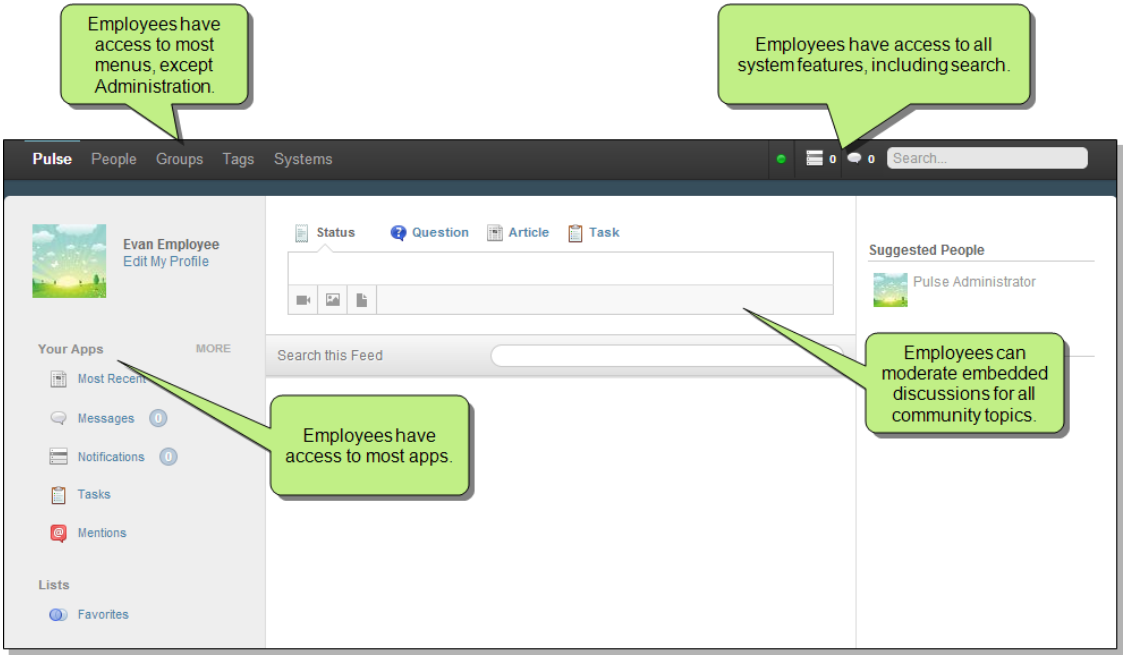
Members of the Administrators group have full access to all dashboard features and options. It is recommended that you limit the number of members in the Administrators group. See "Managing Users" on page 243.



EMPLOYEE DASHBOARD

The Employee dashboard is available to registered users who have been added as members of the Employees group in Pulse. See "Managing Users" on page 243 and "Managing Groups" on page 234.

This dashboard provides members with access to a variety of Pulse moderation features and all of the customer-facing community features.

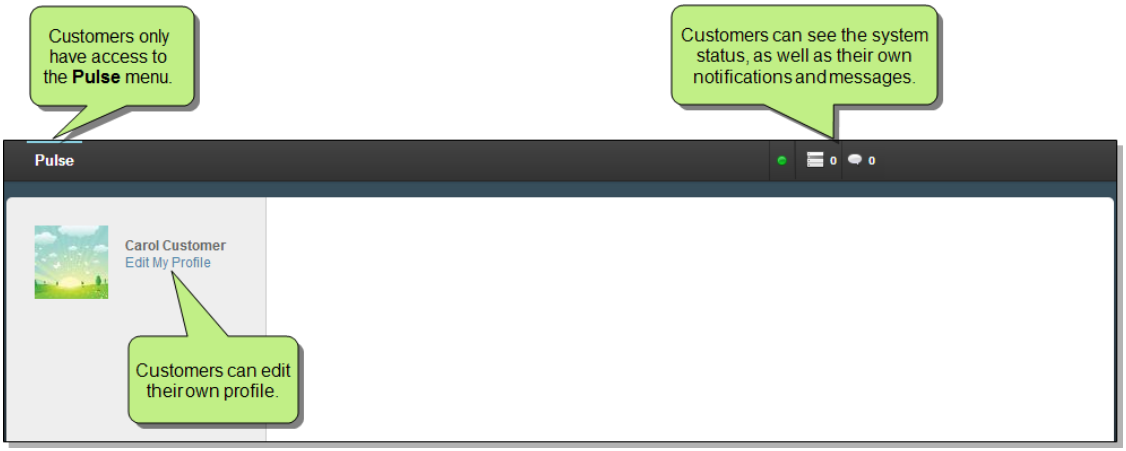


CUSTOMER DASHBOARD

The Customer dashboard has limited access to features. It lets users edit their profile, view the general system status, view system notifications, and use messaging features.

Users with access to functions of the Customer dashboard include:

- **All Registered Users** All registered Pulse users have access to the features that are available in the Customer dashboard.
- **Members of the Customers Groups** An Administrator can also explicitly add a user as a member of the Customers group. See "Managing Users" on page 243.



Because the Customer dashboard functions are limited, most organizations integrating a Pulse system with Flare encourage their end users to access Pulse directly from the Flare output. The embedded discussions forms and optional Community tab in the Flare output provide end users with the richest community experience.

Note: By default, registered users who are not explicitly added to a group are granted the same access privileges as members of the Customers group.

Initial Dashboard Login for Administrators

If this is your first time logging in to the Pulse dashboard, you must log in with the PulseAdmin account that was created during the initial server configuration. See "Pulse Server Configuration" on page 89.

HOW TO INITIALLY LOG IN TO THE DASHBOARD

1. In a web browser, navigate to the Pulse Server URL.

   HOW TO FIND THE PULSE SERVER URL

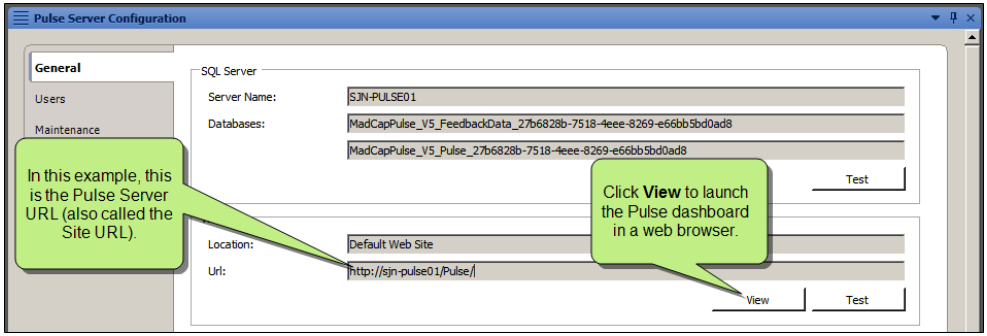
   If you do not know the Pulse Server URL:

   a. Log in to the Pulse web server as the server administrator.

   b. Double-click the MadCap Pulsedesktop shortcut. The starts the Pulse application on the server.

   c. In the Pulse Server Configuration window, the Pulse Server URL appears in the **Web Site** area in the **URL** box.

   d. Click the **View** button to launch the Pulse dashboard.



2. In the Pulse Account Login page, do the following:

   a. In the **Email Address** box, type: `PulseAdmin`.

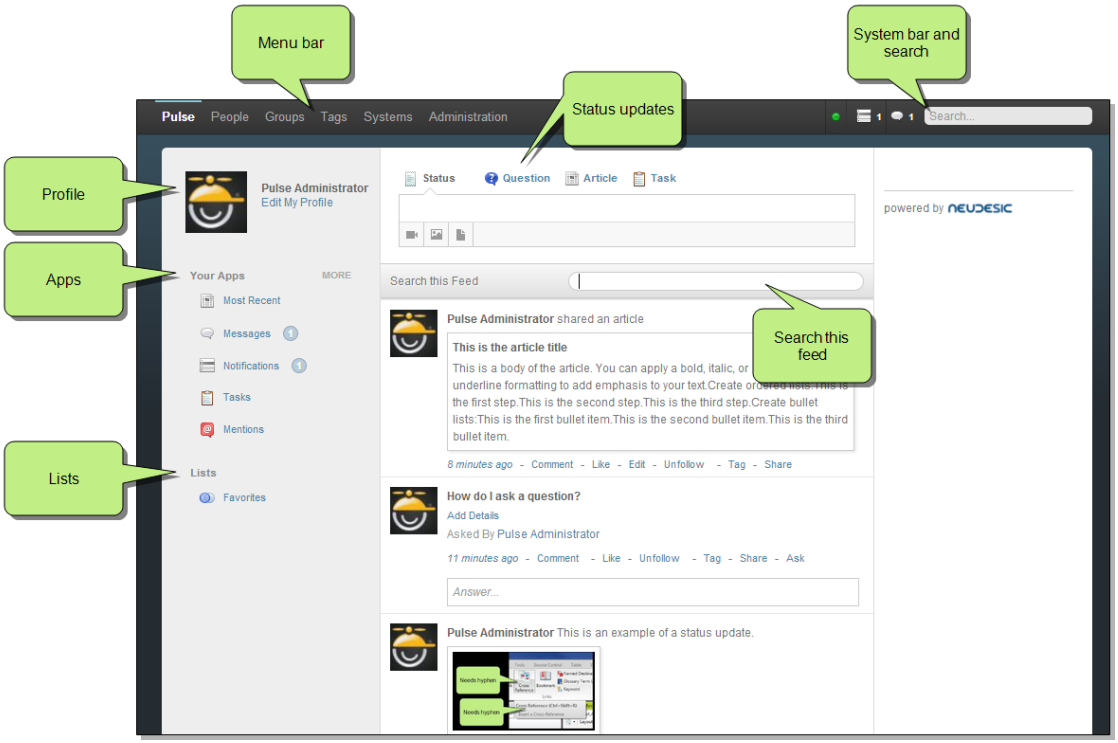
   b. In the **Password** box, enter the password that you created during the initial server configuration. See "Pulse Server Configuration" on page 89.

3. Click **Login**.

After logging in to the Pulse dashboard for the first time, you should create at least one administrator account before you start inviting users to join Pulse. See "Managing Users" on page 243.

Dashboard Structure

The Pulse dashboard consists of several areas:



MENU BAR

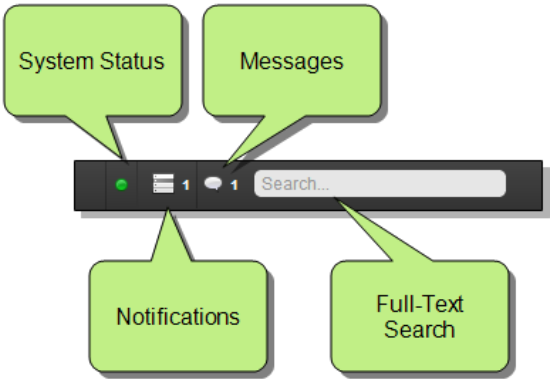
Across the top of left of the Pulse dashboard is the menu bar. The menus and commands that are accessible to you depend on your group membership. This table details the general availability of the Pulse dashboard menus:

Menus	Menu Commands	Customers Group	Employees Group	Administrators Group
Pulse	Home	✓	✓	✓
	Messages	✓	✓	✓
	Profile	✓	✓	✓
	Timeline	✓	✓	✓
	Logout	✓	✓	✓
People	Find People	✗	✓	✓
	Followed by Me	✗	✓	✓
Groups	Find Groups	✗	✓	✓
	Followed by Me	✗	✓	✓
	Owned by Me	✗	✓	✓
	Create Group	✗	✓	✓
Tags	Find Tags	✗	✓	✓
	Followed by Me	✗	✓	✓
	Create Tags	✗	✓	✓

Menus	Menu Commands	Customers Group	Employees Group	Administrators Group
Systems	Find Systems	✗	✓	✓
	Create Systems	✗	✗	✓
Administration	Settings	✗	✗	✓
	Reports	✗	✗	✓

SYSTEM BAR AND SEARCH

Across the top of left of the Pulse dashboard is the system notification bar. This area shows general system status information, including notifications and messages. It also gives users the ability to perform full-text searches of the posts and comments in the embedded discussion forms.

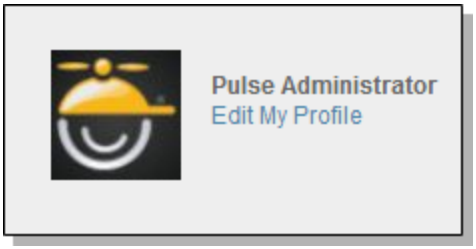


This table details the availability of the system bar and search functions:

Feature	Customers Group	Employees Group	Administrators Group
Status	✓	✓	✓
Notifications	✓	✓	✓
Messages	✓	✓	✓
Search	✗	✓	✓

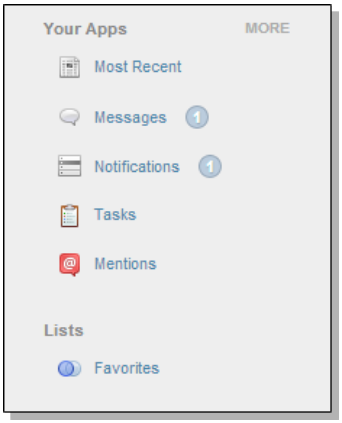
PROFILE

The profile area of the Pulse dashboard shows the user's first and last name, profile avatar, and provides a link to edit the user profile.

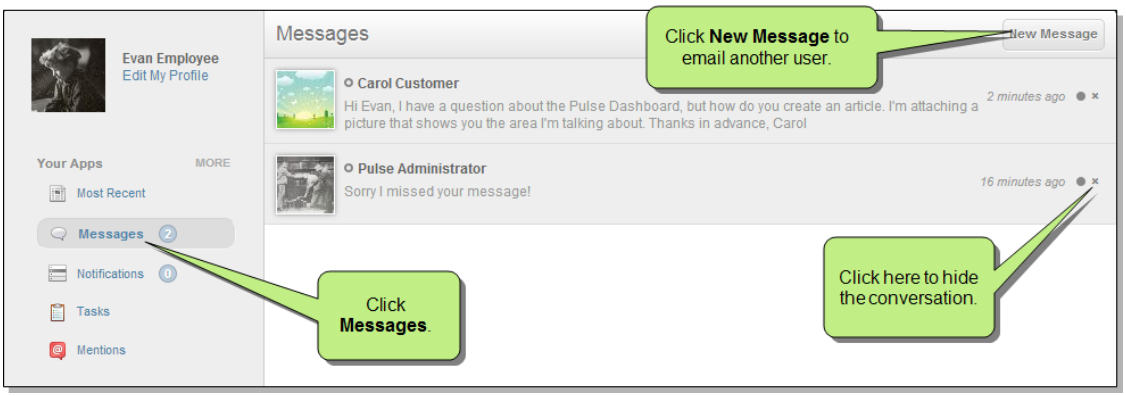


YOUR APPS AND LISTS

The Apps area displays a list of Pulse applications. It lets users customize which apps display in the personalized Your Apps menu. The Lists area displays items that the user adds to his or her list of Favorites.



The following apps can be added to the Pulse dashboard. This feature is available to members of the Administrators or Employees group.



In the table below, an asterisk (*) denotes apps that display in the Your Apps list by default:

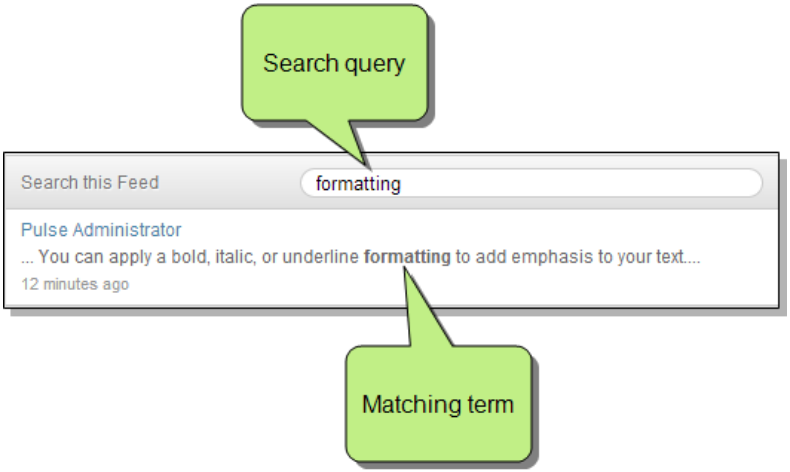
Your Apps	Description
***Most Recent**	Shows your most recent posts.
***Messages**	Shows a list of all system conversations. This includes both chat messages and email messages.
***Notifications**	Shows all of the notifications about system events. You can turn notifications on and off by clicking **Edit My Profile** and then selecting the **Notifications** tab.
***Tasks**	Shows a list of tasks assigned to you.
***Mentions**	Lists posts where you are mentioned.
Images	Displays a gallery of all of the images that you have shared in the system.
Top News	Shows the top news.
Read it Later	Lists items you have marked to read later.
Links	Displays a list of all of the links that you have shared in the system.
Videos	Displays a gallery of all of the videos that you have shared in the system.
Questions	Shows a list of all your posted questions.
Articles	Shows a list of all your posted articles.
Profile	Opens the Profile Editor.

STATUS UPDATES

The lets you post status updates, ask questions, create articles, and assign tasks to other registered users.

SEARCH THIS FEED

The Search this Feed area lets users perform full-text search on the contents of the active system feed. As shown below, matches to search queries are highlighted in bold text.



The Search this Feed area is powered by the Pulse search engine. The Pulse search engine restricts its search to the system feed. It does not search your Flare content for matching topics.

Using the Pulse Menu

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

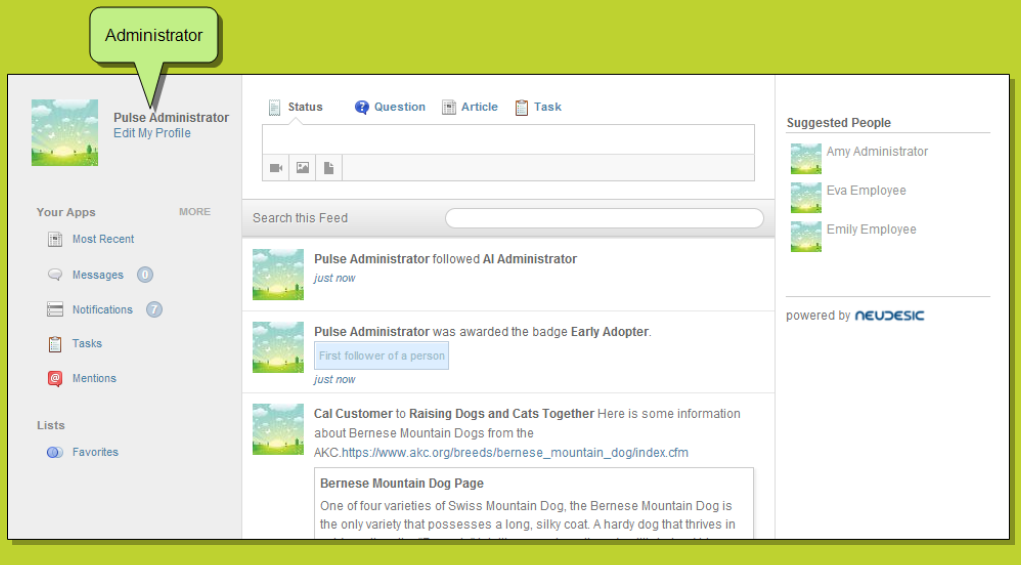
In the Pulse dashboard, the Pulse menu provides all registered users with the ability to access general system and profile information.

Home

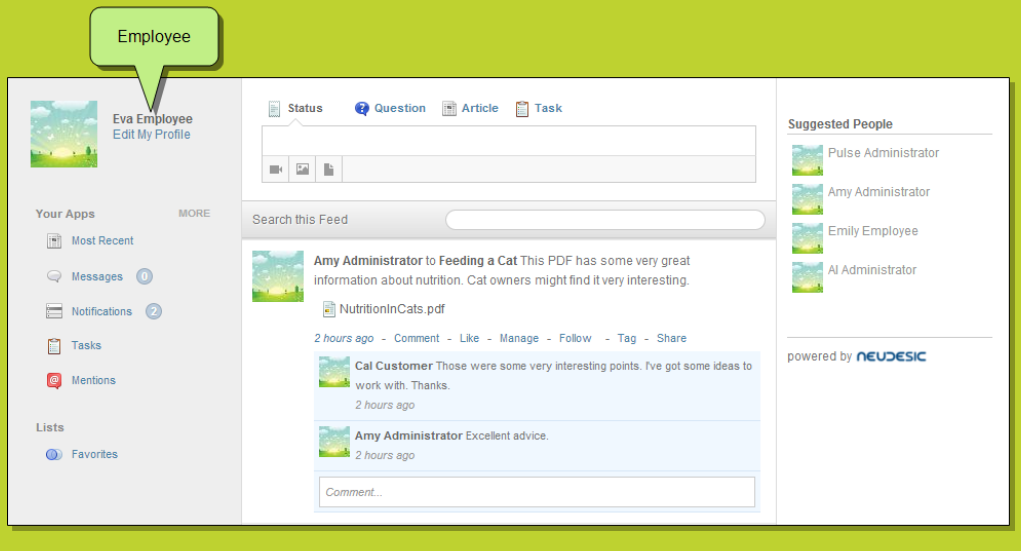
Select **Pulse>Home** to open your personalized Home page. The options available to you in the Home page depend on your user account's group membership. See "Managing Groups" on page 234.

E X A M P L E S

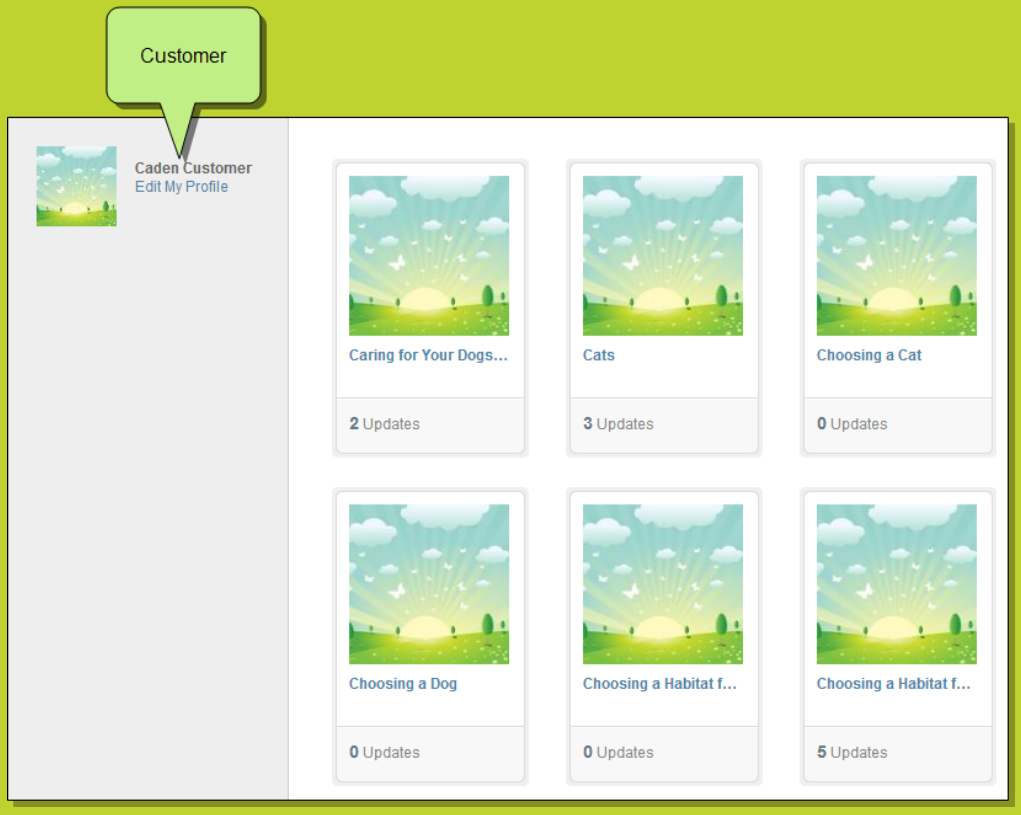
Home page options for members of the Administrators group:



Similar options are available for members of the Employees group:



Limited options are available for members of the Customers group:



Messages

Select **Pulse>Messages** to open the Messages page. This lets registered users create and send messages to other registered users. See "Messaging Tasks" on page 321.

Profile

Select **Pulse>Settings** to open the Settings page. This lets you edit your profile and update your notification settings. The tasks that you can perform in this page are identical to the ones that you can perform when editing your profile from the embedded discussions forms. See "Editing Your Profile" on page 293.

Timeline

TIMELINE

Select **Pulse>Timeline** to open the Activity Timeline page. This shows a list of Pulse activity in chronological order. You can click the links at the top right-side of the page to limit the activity shown in the timeline to the **Past Year**, **Past Month**, or **Past Week**. The posts with the most user activity appear under Hottest Posts.

Logout

Select **Pulse>Logout** to quit the Pulse dashboard session.

Using the People Menu

This feature is available to members of the **Administrators** and **Employees** group.

In the Pulse dashboard, the People menu provides members of the Administrators and Employees groups with the ability to find registered Pulse users.

Menu Commands

In the Pulse dashboard, there are two menu commands in the People menu:

- **Find People** Select this menu command to search through the list of people in Pulse.
- **Followed by Me** Select this menu command to search through the list of people that you follow.

Finding People

Use the following steps to find registered users.

HOW TO FIND PEOPLE

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **People>Find People**. This opens the Find People page.
3. In the Find People page, the most recently created users appear by default. You have these options:

   HOW TO FILTER THE FIND PEOPLE LIST

   Filter the Find People list by selecting one of these options from the drop-down:

   - **New People** Shows the most recently created users.
   - **Most Followed People** Show the users with the largest combined number of followers and tags.
   - **Most Active People** Shows the users with the greatest amount of activity.
   - **Followed by Me** Shows a list of users that you follow. If you are an Administrator or Employee group, this is the same as selecting **People>Followed by Me**.
   - **All People** Shows a list of all registered Pulse users.

   HOW TO SEARCH FOR PEOPLE

   In the Find People page, type a query in the **Search** field. Then press **Enter**. Matches appear in the Find People page.

Using the Groups Menu

This feature is available to members of the **Administrators** and **Employees** group.

In the Pulse dashboard, the Groups menu provides members of the Administrators and Employees groups with the ability to create and moderate special interest groups in Pulse.

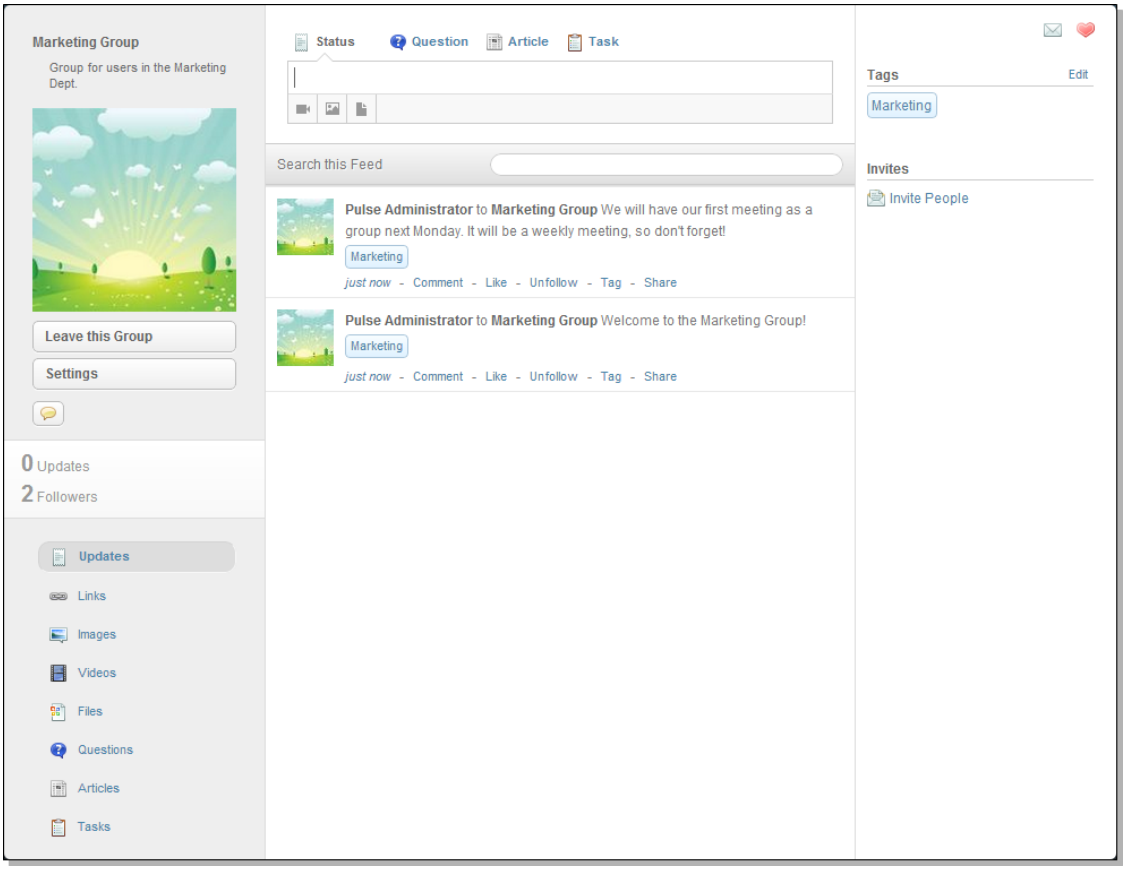
Menu Commands

In the Pulse dashboard, the Groups menu contains the following commands:

- **Find Groups** Select to find a specific group.
- **Followed by Me** Select to see the groups that you are following.
- **Owned by Me** Select to see a list of groups where you have been assigned owner permissions.
- **Create Groups** Select this menu command to open the Create Group page.

Understanding Groups

You can create groups to communicate with a specific subset of users. This is helpful when you want to use Pulse as a vehicle for sharing Pulse content with a specific audience. For example, you might have a Flare community with a Pulse system for a project about pets and have a need to create separate groups for users with a specific interest in dogs or cats. This gives you the ability to post updates and articles, as well as ask questions specifically targeted for those members.



Finding Groups

Use the following steps to find groups.

HOW TO FIND GROUPS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Groups>Find Groups**.
3. In the Find Groups page, the most recent groups display by default.

   HOW TO FILTER THE FIND GROUPS LIST

   You can filter the groups list by selecting one of these options from the drop-down list:

   - **New Groups** Shows the most recently created groups .
   - **Most Followed Groups** Show the groups with the largest combined number of followers and tags.
   - **Most Active Systems** Shows the groups with the greatest number of user activities.
   - **Followed by Me** Shows the groups in which you are currently included. If you are an Administrator or Employee group, this is the same as selecting **Groups>Followed by Me**.
   - **Owned by Me** Shows groups where your permissions setting is set to Owner. If you are an Administrator or Employee group, this is the same as selecting **Groups>Owned by Me**.
   - **All Groups** Displays all groups that exist in the Pulse database.

   HOW TO SEARCH FOR A GROUP

   To quickly find the group you are looking for, enter a query in the **Search** field in the upper-right corner of the Find Groups page.

   HOW TO CREATE A GROUP

   To create a group, click the **Create Group** link at the bottom of the page.

4. Click on any of the groups to open the Groups page.

Joining and Participating in Groups

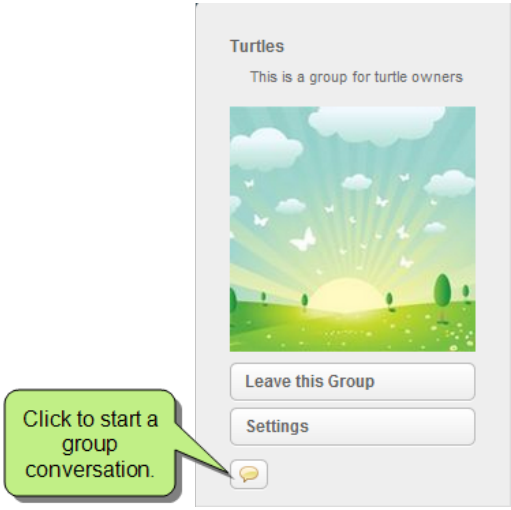
You can join groups; chat with members; view recent updates, members, and tags; subscribe to group feeds; and add feeds to your favorites.

HOW TO JOIN OR LEAVE A GROUP

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Groups>Find Groups**.
3. In the Find Groups page, click the desired group to open its page.
4. Depending on the option available to you, click the appropriate button:
   - **Join this Group** Click to become a group member.
   - **Leave this Group** Click to remove yourself as a group member.

HOW TO CHAT WITH GROUP MEMBERS

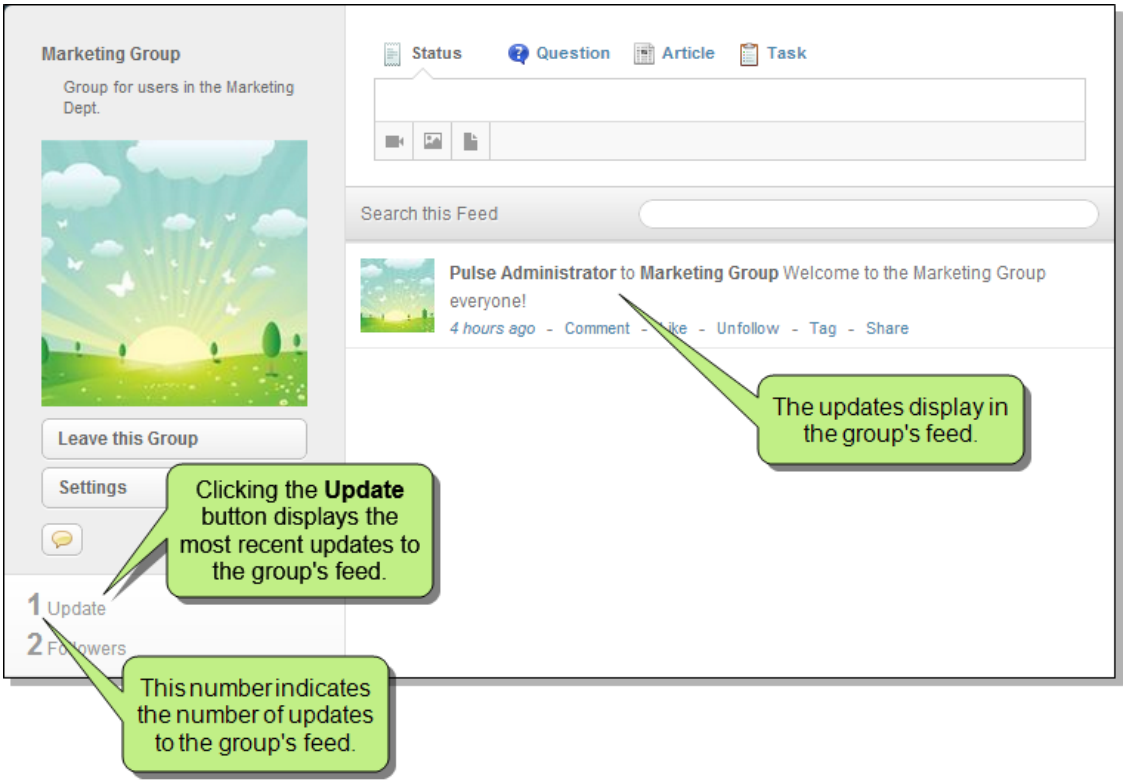
1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Groups>Find Groups**.
3. In the Find Groups page, click the desired group to open its page.
4. Click to start a group conversation.



5. In the Conversation with Group popup window, do the following:
    a. Type a message in the **Enter a message** box.
    b. If you want to add an attachment, click the attachment link.
    c. Press **Enter**.

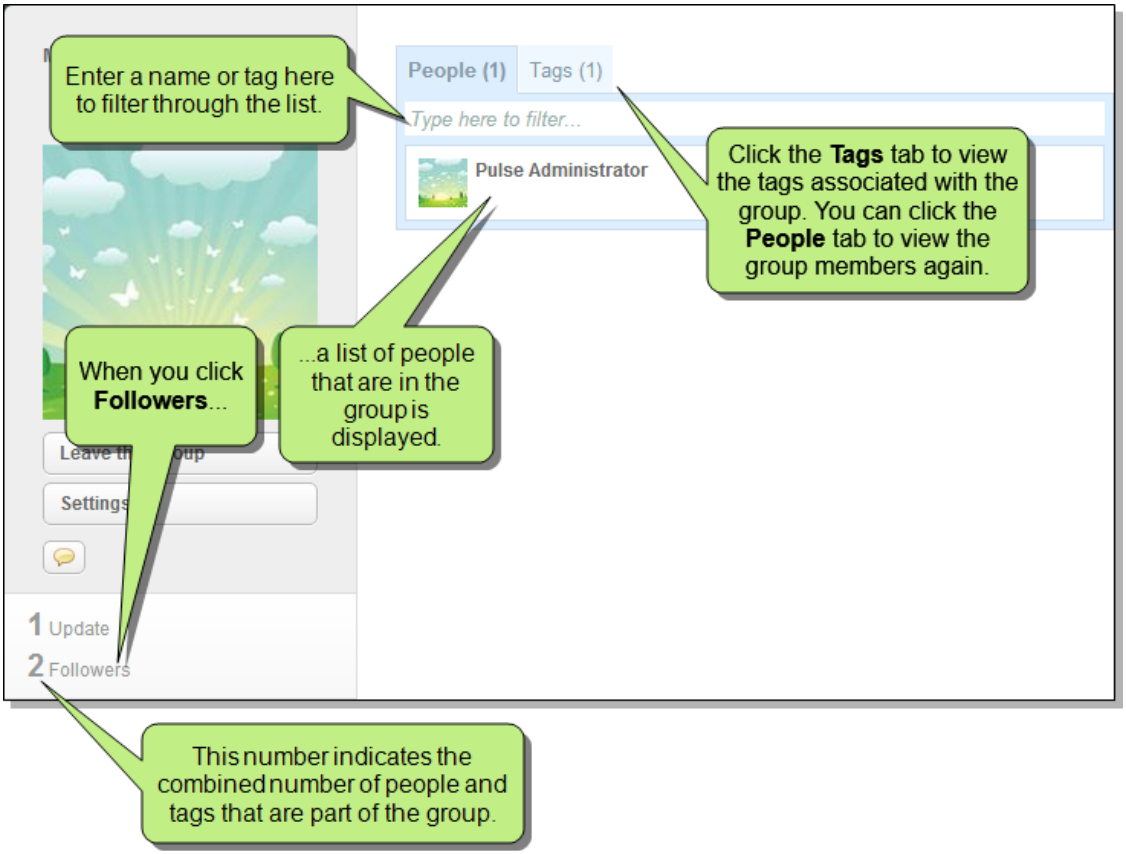
HOW TO VIEW RECENT UPDATES

Click 1 Update to view recent updates to the group's feed. The number next to the Update button indicates the number of updates to the group.



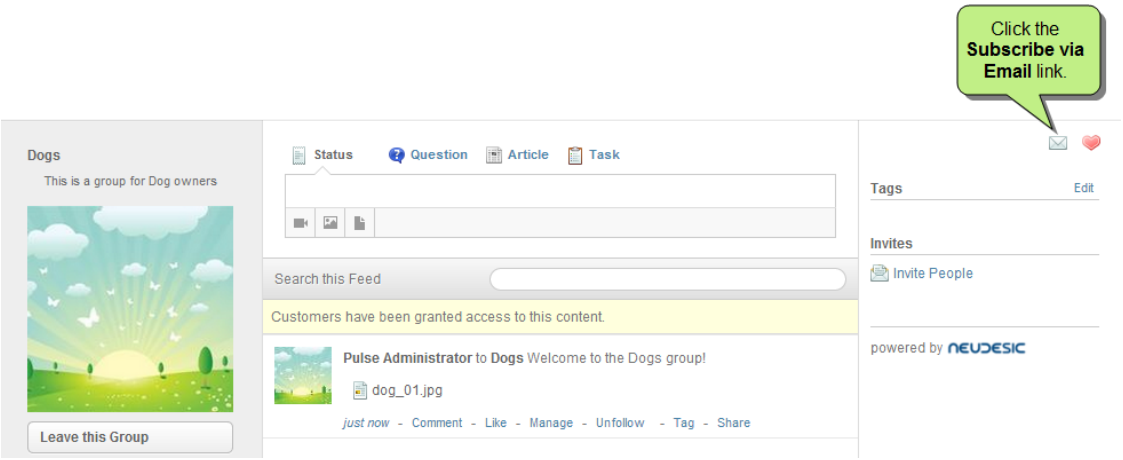
HOW TO VIEW GROUP MEMBERS AND TAGS

Click the **Followers** link to see a list of group members. The number next to the Follower button indicates the combined number of followers and tags for the group.



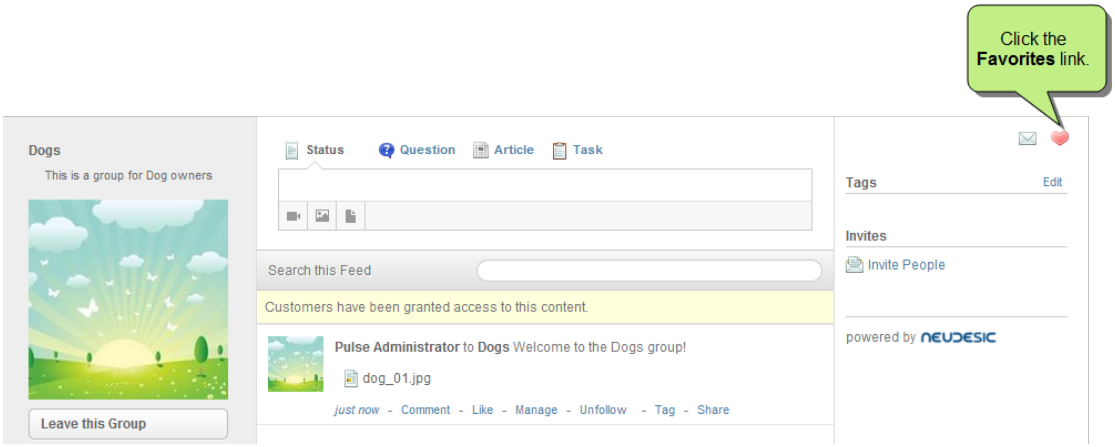
HOW TO SUBSCRIBE TO A GROUP FEED

To subscribe to a group feed to receive updates by email, click the **Subscribe via Email** link. If you have not already been added as a group member, you are added now.



HOW TO ADD THE GROUP FEED TO YOUR FAVORITES

To add a group to your list of Favorites, click the **Favorites** link.



You have these options and you can add group feeds to more than one list:

- **Add to Favorites List** Place a check mark in the **Favorites** box to add it.
- **Create a New List** Click **+NewList**to create a new favorites list. Then enter a name for the list and place a check mark next to that list name.

Creating Groups

Use the following steps to create groups.

HOW TO CREATE GROUPS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Groups>Create a Group**.
3. In the Create Group page, click the **Basic** tab and enter the appropriate group information:

   HOW TO ENTER THE GROUP INFORMATION

   a. In the **Name** field, type a group name.

   b. In the **Description** field, type a short group description.

   c. In the **Audience** field, select the desired audience. These settings correspond to the membership group permissions.

      - **Employees** Only members of the Employees group can be invited to and join groups.
      - **Employees and Customers** Members of both the Employees and Customers groups can be invited to and join groups.

   d. Place a check mark in the **Allow Users to Find This Group** box. The group will be visible to users who perform a search for the group. If the check box is left blank, users must be invited to join the group.

   The check box "Allow Users to Find This Group" doesn't have an effect on audience permission in the privacy tab

4. Click the **Privacy** tab. Then do the following:

   HOW TO ADD USERS AND GROUPS

   a. Click the **Add a user or group** link.

   b. In the **Add a user or group** box, start typing a user or group name. Matches appear in the list.

   c. Place a check mark next to the users or groups that you want to add as members.

   d. Click **Add**.

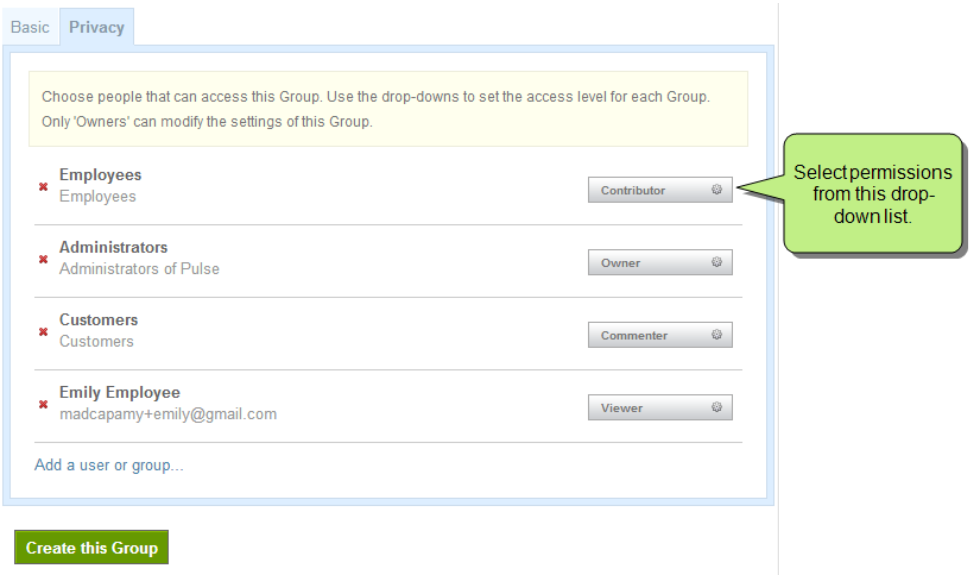
   HOW TO REMOVE A USER OR GROUP

   To remove an existing user or group from the membership list, click ✖ next to the appropriate name(s).

HOW SET PERMISSIONS FOR GROUP MEMBERS

If you are the owner of a group, you can set access permissions for the group from the drop-down list:

- **Owner** Gives the user or group full access permissions to the group. Owners can comment, post, add and remove content, adjust group settings, and add group members.
- **Contributor** Gives the user or group access permissions to post to the group.
- **Commenter** Gives the user or group access permission to comment on posts, but restricts the user from creating posts.
- **Viewer** Gives the user or group access permissions to view posts and comments, but restricts the user from any other type of group participation.



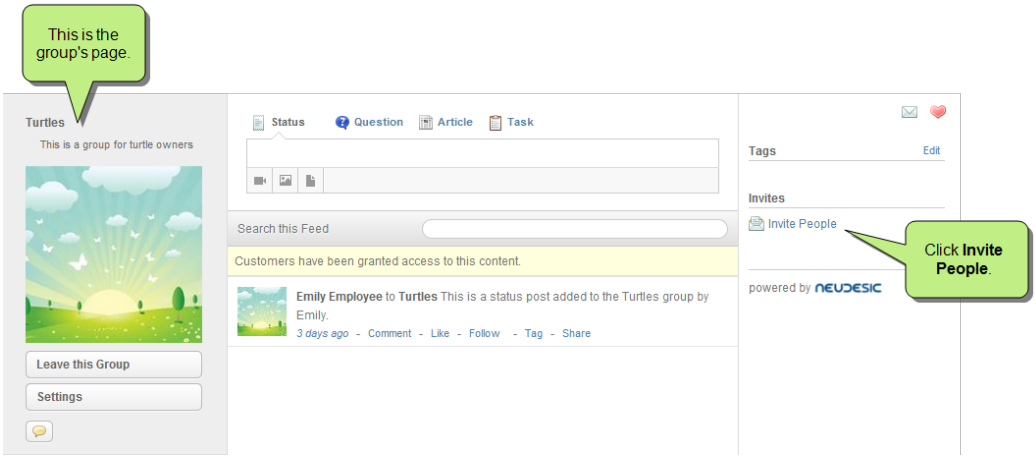
5. Click **Create this Group**.

Moderating Groups

If you are a group member who has been granted Owner permissions, you have the ability to moderate a group from the Pulse dashboard.

HOW TO INVITE PEOPLE TO A GROUP

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. From the menu bar, select **Groups>Owned by Me**.
3. In the Find Groups page, click the desired group to open its page.
4. Under the **Invites** area, click the **Invite People** link.



This opens the Invite People dialog.

5. In the Invite People dialog, you can invite people by doing the following:
   a. In the Invite People dialog, click a user or group name in the box.
   b. Place a check mark next to the users or groups to invite.
   c. Click **Invite**.
   d. If the people do not have access to the feed, click **Grant Access**.

      This sends an invite to the person you added.

HOW TO ADJUST THE GROUP SETTINGS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Groups>Owned by Me**.
3. In the Find Groups page, click the desired group to open its page.
4. In the group's page, click the **Settings** button.
5. In the Group page, click the **Basic** tab and change the group information as needed:
   a. In the **Name** field, type a group name.
   b. In the **Description** field, type a short group description.
   c. In the **Audience** field, select the desired audience. These settings correspond to the membership group permissions.
      - **Employees** Only members of the Employees group can be invited to and join groups.
      - **Employees and Customers** Members of both the Employees and Customers groups can be invited to and join groups.
   d. Place a check mark in the **Allow Users to Find This Group** box. The group will be visible to users who perform a search for the group. If the check box is left blank, users must be invited to join the group.
6. Click the **Privacy** tab.
7. In the Privacy tab, you can do the following:

   #### *HOW TO ADD USERS AND GROUPS*

   a. Click the **Add a user or group** link.
   b. In the **Add a user or group** box, start typing a user or group name. Matches appear in the list.
   c. Place a check mark next to the users or groups that you want to add as members.
   d. Click **Add**.

   #### *HOW TO REMOVE A USER OR GROUP*

   To remove an existing user or group from the membership list, click ✖ next to the appropriate name(s).

   #### *HOW TO SET PERMISSIONS FOR GROUP MEMBERS*

   If you are the owner of a group, you can set access permissions for the group from the drop-down list:

   - **Owner** Gives the user or group full access permissions to the group. Owners can comment, post, add and remove content, adjust group settings, and add group members.
   - **Contributor** Gives the user or group access permissions to post to the group.

- **Commenter** Gives the user or group access permissions to comment on posts, but restricts the user from creating posts.
- **Viewer** Gives the user or group access permissions to view posts and comments, but restricts the user from any other type of group participation.

8. When finished, click **Save**.

Joining Groups

If you add member of the Customers group to a discussion group, those users do not have the ability to accept or deny invitations. However, if you are a member of the Employees group, you will be notified and have the ability to join the group.

HOW TO JOIN GROUPS

1. If you have been invited to join a group, you will be notified by email and when you log in to the Pulse dashboard.
2. Log in to the Pulsedashboard. Then click the link in the upper-right corner of the Pulse dashboard.
3. Open the group page by doing one of the following:
   - Click the group name.

     OR
   - Click **View all notifications** to open the Notifications page. Then click the group name.
4. In the group's page, click the **Join this Group** button. This option is only visible to members of the Administrators and Employees group.

Using the Tags Menu

This feature is available to members of the **Administrators** and **Employees** group.

In the Pulse dashboard, the Tags menu is available to members of the Administrators and Employees groups. Tags are used to organize information.

Using Tags

While tags can be created and applied to posts by any registered user (see "Tagging Posts" on page 314), members of the Employees and Administrators group also have the ability to create, follow, and delete tags in feeds.

E X A M P L E

Let's say you want to create tags to apply to posts that talk about cats, fish, or nutrition.

When posts are tagged, members of the Employees and Administrators groups can click a tag to view all of the posts with that tag.

GROUP PERMISSIONS AND TAGGING OPTIONS

The table below details the tagging options that are available for members:

Feature	Customers Group	Employees Group	Administrators Group
Create New Tags and Add Existing Tags to Posts	✓	✓	✓
Follow Tags	✗	✓	✓
Create New Tags and Add Existing Tags to Topic Feeds	✗	✓	✓
Invite People to Follow a Tag's Feed	✗	✓	✓
Subscribe to a Tag's Feed	✗	✓	✓
Edit Basic Settings for Tags	✗	✗	✓
Edit Privacy Settings for Tags	✗	✗	✓
Create Parent and Child Tags	✗	✗	✓
Change the Image Associated with the Tag	✗	✗	✓
Delete a Tag from the System	✗	✗	✓
Find Experts Based on Answers to Tagged Questions	✗	✗	✓

Creating Tags

Tags can be created by any registered user. Keep the following in mind:

- There is no limit to the number of tags that you can create in Pulse.
- You can create tags up to 100 characters in length. However, tags are most effective when limited to one or two keywords.
- If you create a tag that contains multiple words, you do not need to separate the words with an underscore.
- There is no limit to the number of tags that can be applied to a post.

HOW DO YOU CREATE TAGS?

How you create tags depends on your group membership:

Group	Pulse Dashboard	Embedded Discussion Forms
Administrators	Use the **Tags>Create Tag** menu command.	» Click the **Tag** link at the bottom of a post. OR » Click the **Edit** link in the Tags section.
Employees	Use the **Tags>Create Tag** menu command.	» Click the **Tag** link at the bottom of a post. OR » Click the **Edit** link in the Tags section.
Customers	✕	Click the **Tag** link at the bottom of a post.

HOW TO CREATE TAGS IN THE PULSE DASHBOARD

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Tags>Create Tag**.
3. In the Create Tag page, click the **Basic** tab. Then do the following:
   - **Change the Tag Name** In the **Name** field, you can enter a new tag name.
   - **Change the Tag Description** In the **Description** field, you can enter a new tag description.
   - **Change the Tag's Profile Image** You can click **Change Image** to open a dialog to select a new image. Once you select an image, the Crop Your Image dialog appears. Select the area of the image that you want displayed and click **Crop and Save**.
   - **Delete the Tag** You can remove the tag from Pulse by clicking **Delete Tag**.
4. Click the **Privacy** tab. Then set permissions for the tag as follows:

   #### *HOW TO CONFIGURE PRIVACY SETTINGS*

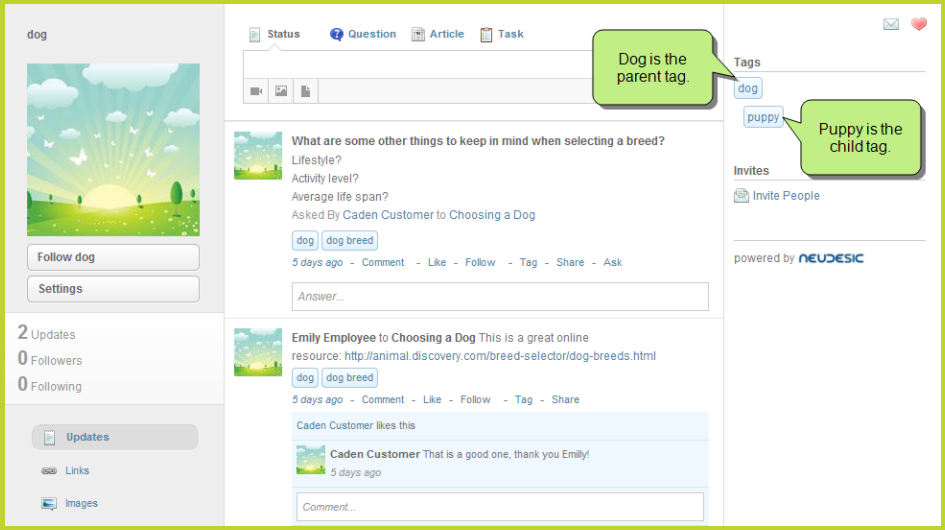
   You have a variety of options when configuring privacy settings:

   - **Add Users and Groups** You can add users by clicking **Add a user or group**. This opens the Add a User or Group dialog. Do the following.
     - Enter the name of the user or group in the small field at the top of the dialog. Names that already exist in the Pulse database will appear in the large field below.
     - Click the check box next to the name of the user or group you want to add in the large field. You can then enter other names in top field and select different users or groups if you need to.
     - Click **Add**.
   - **Remove Users** You can remove users by clicking ✖ next to their names.
   - **Set Permissions for Users** Select the permission settings for each user. You can select the following options:
     - **Owner** Gives the user full access to the group. Owners can comment, post, add and remove content, adjust group settings, and add users to the group.
     - **Contributor** Lets lets the user create group posts.
     - **Commenter** Lets the user comment on group posts, but restricts the user from posting content.
     - **Viewer** Lets the user view the group, but they cannot interact with it in any other way.

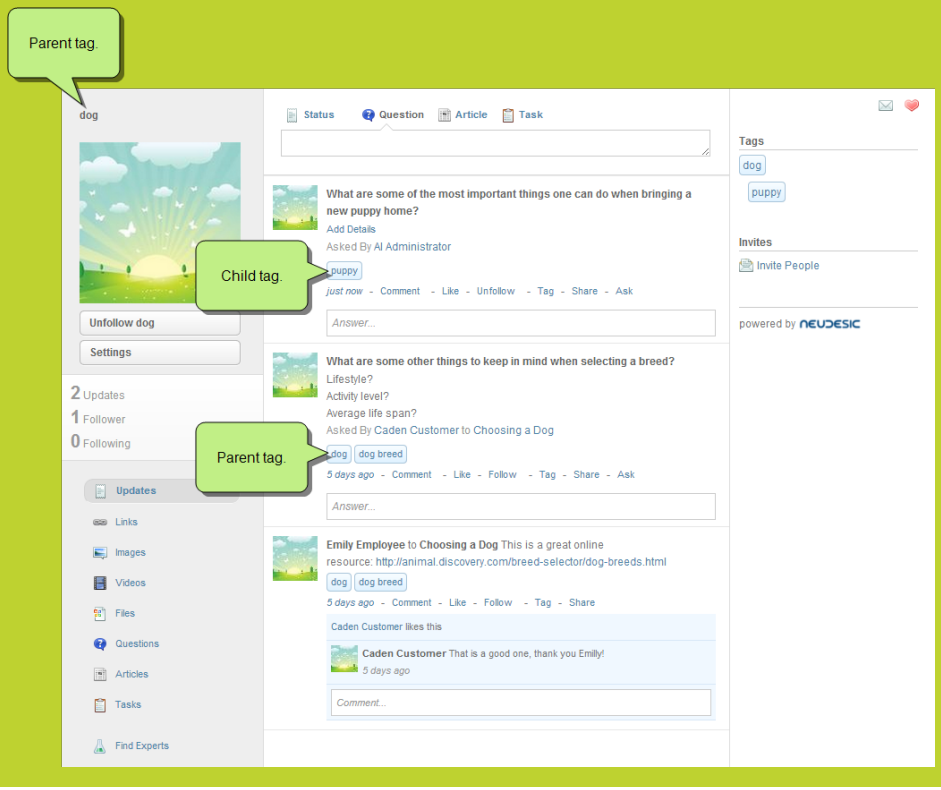
5. Click the **Management** tab and define any desired parent/child relationships for your tags. Think of parent and child tags as a way to organize your tags in a hierarchy.
   a. In the **Parent** tag box, type a name for the parent.
   b. In the **Child** tag box, type a name for the child .

E X A M P L E S

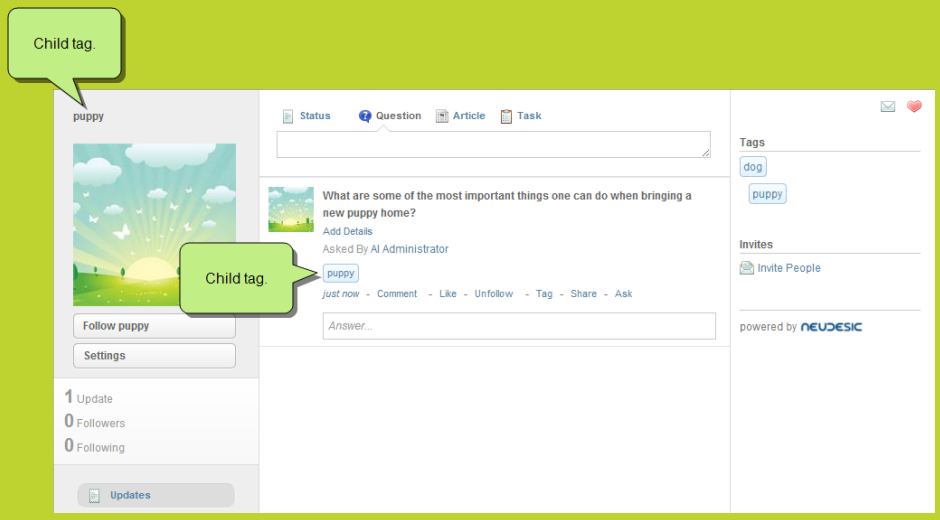
Let's say that in the Tag page for "dog" we want to create a child tag named "puppy." In the tags section, note how the parent-child relationship between the two tags is reflected by the indentation:



When viewing the page for the parent tag, any content marked with either a parent or child tag appears:



When viewing the page for the child tag, only the content marked with the child tag appears:



6. Click the **Create this Tag** button.

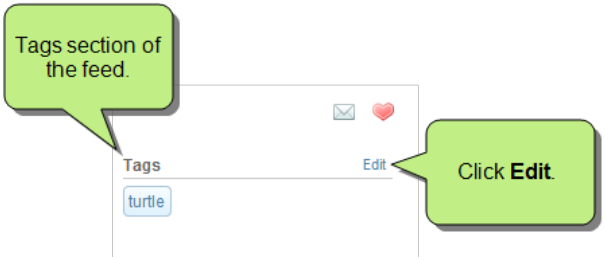
   This opens the page for the tag, which gives you different options for editing the tags settings.

HOW TO CREATE TAGS IN THE EMBEDDED DISCUSSION FORMS

Tags can be created in two ways using the Pulse system that is integrated with the Flare output—from the Tags section of the embedded discussion forms or by clicking the Tag link directly under a post.

HOW TO ADD TAGS FROM THE TAGS SECTION OF A FEED

1. Log in to the Flare output using an account that is a member of the Administrators or Employees group.
2. In the right column of an embedded discussions form, next to the **Tags** section, click **Edit**. A field will appear displaying existing tag(s).



3. Enter a new tag and click **Update**.

HOW TO ADD TAGS TO A POST

1. Log into the Flare output using a registered Pulse account.

> **Note:** This is the only method that members of the Customers group can use to create tags.

2. In the options below a feed post, click **Tag**.

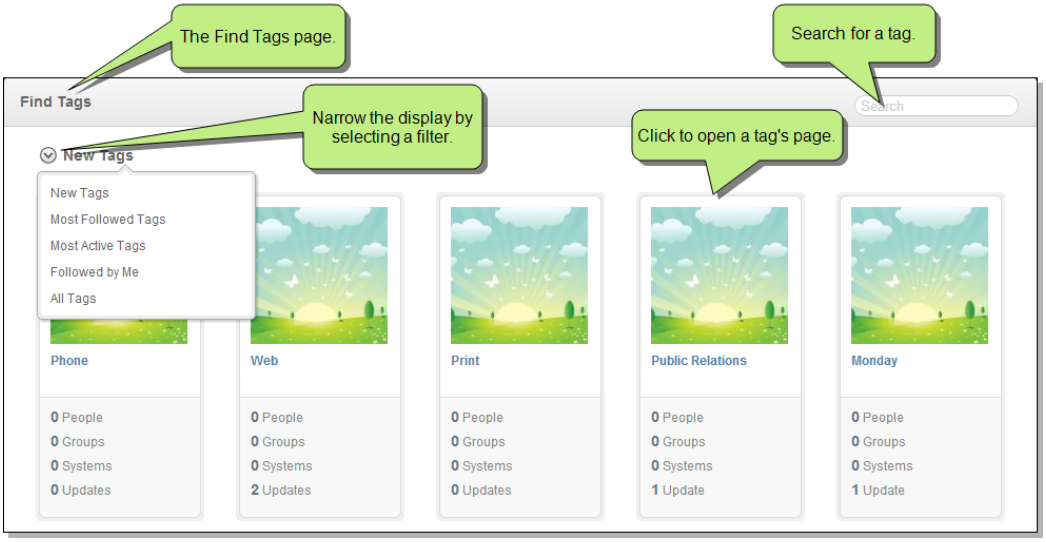
3. In the Edit Tag dialog, enter a new tag name in the field. If you want to add multiple tags, separate each tag with a comma.
4. Click **Update**. The tag is created and the post is tagged with the selected tag.

Finding and Moderating Tags

Use the following steps to find and moderate tags.

HOW TO FIND AND MODERATE TAGS

1. Log in to the Pulse dashboard as an Administrator or Employee.
2. Select **Tags>Find Tags**.
3. In the Find Tags page, all of the tags in the Pulse system are listed. You can click one of the tags to open its corresponding page.



4. Depending on what you want to accomplish, do one of the following:

HOW TO SEARCH FOR A TAG

1. In the Find Tags page, type part or all of the tag name in the **Search** box and press **Enter**.
2. Click the tag to open it in a new web page.

HOW TO FILTER THE TAGS ON THE PAGE

Using the drop-down list in the Find Tags page, you can narrow the tags that are viewable on the page by selecting one of these items:

- **New Tags** Shows the most recently created tags.
- **Most Followed Tags** Shows the tags with greatest numbers of followers.
- **Most Active Tags** Shows the tags with the greatest numbers of updates.
- **Followed by Me** Shows the tags that you are following.
- **All Tags** Shows all tags.

HOW TO FOLLOW A TAG

There are two ways for members of the Administrators or Employees group to follow a tag.

HOW TO FOLLOW A TAG FROM THE DASHBOARD

1. Log in to the Pulse dashboard as an Administrator or Employee.
2. Select **Tags>Find Tags**. Then open the desired tag's page.
3. Under the tag's image, click the **Follow** link.

HOW TO FOLLOW A TAG FROM A POST

1. In a web browser, navigate to your published Flare output.
2. Log in to Pulse as an Administrator or Employee.
3. In the embedded discussion form, hover the mouse cursor over a tag. A popup window appears.
4. In the popup window, click **Follow**.

HOW TO CHANGE THE TAG SETTINGS

1. Log in to the Pulse dashboard as an Administrator or Employee.
2. Select **Tags>Find Tags**. Then open the desired tag's page.
3. Click **Settings**.
4. Change the tag name, description, privacy settings, profile image, or manage parent and child tags.

HOW TO VIEW TAG INFORMATION

In the tag's page you have other options that include:

- **View Updates** Click **Updates** to view updates to the tag's feed. The number next to the button indicates the number of updates to the tag's feed.
- **View Followers** Click **Followers** to view a list of users and groups following the tag. The number next to the button indicates the number of followers.
- **View the Following** Click **Following** to view the users, groups, systems and searches the tag is following.
- **Filter the Tag Feed Using the Your Apps Menu** Use the Your Apps menu on the tag page to filter the posts displaying in the tag's feed. For example, click **Images** to view only the tagged images.
- **Find Experts** Experts are users who have answered questions that have been tagged. To find an expert for a tag, go to the tag's page and click **Find Experts** to open the ranking page. See "Finding Experts" on page 379.

Using the Systems Menu

This feature is available to members of the **Administrators** and **Employees** group.

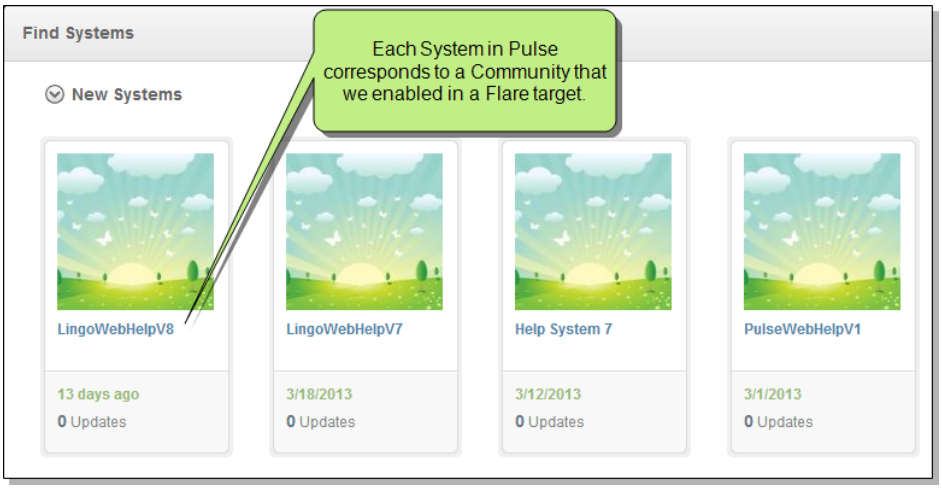
In the Pulse dashboard, the Systems menu is available to members of the Employees and Administrators group. Members of the Employees group can find existing systems. Members of the Administrators group can both find and create systems.

Pulse Systems and Flare Communities

To integrate a Pulse system with the Flare output, you must first create a community in the Flare target (see "Integrating Flare and Pulse" on page 112). This action also creates a corresponding system in Pulse.

A Flare community always corresponds to a Flare target. If you publish more that one online Flare target, you have these options:

- **Enable One Flare Community for All Targets** This creates one Pulse system and Flare community to use with all of your Flare targets. It also lets you run reports for the entire community.
- **Enable a Unique Flare Community for Each Target** This creates a separate Flare community and Pulse system for each Flare target. The benefit to this approach is that it lets you run reports for each community.



Creating Systems and Communities

There are two ways to create a new system in Pulse to integrate with a Flare community. For the best experience, it is recommended that you always create communities using the Flare Target Editor:

Method	Description	Notes
Community Tab in the Flare Target Editor	When you add a Flare community to a target, that community is automatically added as a system in Pulse. This gives members of the Customers group the ability to post updates, questions, articles, and tasks in embedded discussion forms for your Flare output. Members of the Administrators and Employees groups can also moderate these posts and other Pulse features using the Pulse dashboard.	This is the recommended method. See "Integrating Flare and Pulse" on page 112.
Systems Menu in the Pulse Dashboard	If you decide to create a system in Pulse, it will require several extra steps on your part to integrate that system with Pulse.	This method is supported, but not recommended. See the instructions below.

HOW TO CREATE A SYSTEM USING THE PULSE DASHBOARD

Important: If you create your new system using the Pulse dashboard, it will require several extra steps on your part. This is why we recommend creating Pulse systems from the Community tab of the Flare Target Editor. See "Integrating Flare and Pulse" on page 112.

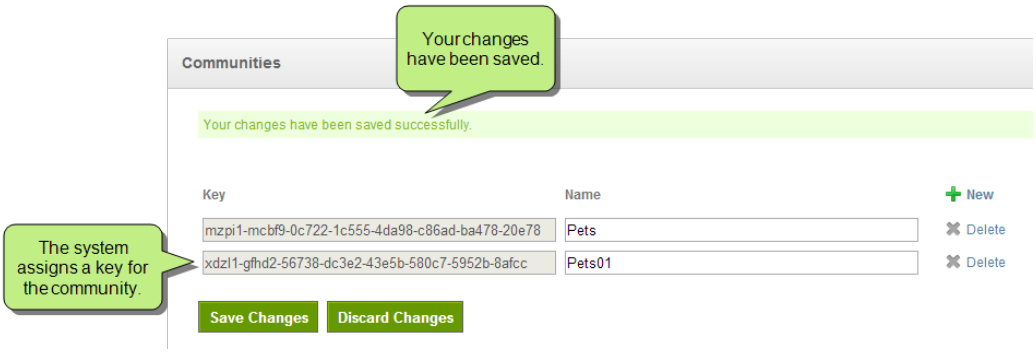
1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Open the Create System page using one of these methods:
   - Select **Systems>Create System**.
   - Select **Systems>Find System**. Then click **Create System** at the bottom of the page.
3. Under the **Basic** tab, type the following for the system hub:
   a. **Name** The name of the system.
   b. **Description** A short description about the system.
4. Click **Create this System**.This opens the new system's page in thePulse dashboard.
5. Select **Administration>Settings**.

6. In the Settings page, click **Communities**.
7. In the Communities page, click **New**. Then type the name of the system in the **Name** box.

> **Important:** Your entry must exactly match the system name you created earlier.

8. Click **Save Changes**. When prompted to confirm that you want to save all changes, click **OK**.

   A key for your new Flare community appears in the Communities list and a message confirms that your changes have been saved successfully.



9. Log out of the Pulse dashboard.
10. In Flare, open the desired Flare target.
11. In the Target Editor, select the **Community** tab.

> **Note:** These instructions assume that you have already enabled the Pulse server and entered your community login information. If this is not the case, see "Integrating Flare and Pulse" on page 112.

12. Under **Current Pulse Configuration**, click **Refresh**.
13. Under **Community** , click **Manage**. Note that your new Pulse system/Flare community is now listed in Flare.
14. Click **Remap Topics**.

Configuring Systems

You can configure a variety of settings for a Pulse system.

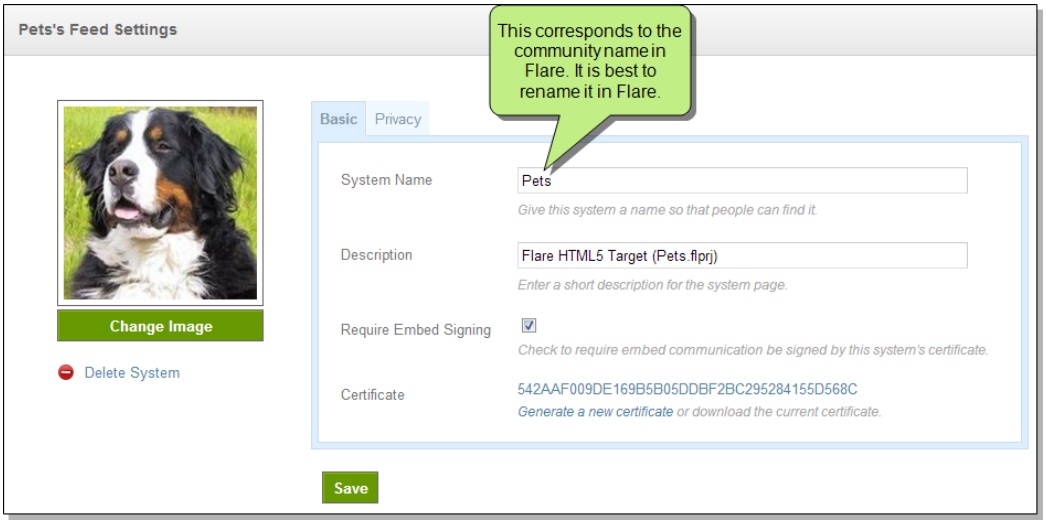
HOW TO CONFIGURE THE BASIC SETTINGS FOR A SYSTEM

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Systems>Find Systems**. Then click the desired system link to configure it. The system page appears.

3. In the system page, click **Settings**.The system's Feed Settings page opens.
4. In the **Basic** tab, user the controls in this tab to define the general system settings. You have these options:
   - **Change Image** Click **Change Image** to upload an image file for your system. Adding an image is a helpful way to distinguish between multiple systems.
   - **System Name** Change the name of the system.

> **Warning:** For best results and to ensure that your Flare topics are properly mapped to the Pulse features, it is strongly recommended that you always change the Flare community name. This will automatically change the **System Name** in Pulse.

- **Description** Update the system description. If this is a Flare-integrated system, we recommend noting it in the description.
- **Require Embed Signing** If you have an embedded signing requirement for SSL, place a check mark in this box. This is the default setting. Remove the check mark to disable the option. To find out if your company has SSL requirements, see your Network Administrator.
- **Certificate** If you require a certificate for SSL, click **Generate a new certificate**. This creates a certificate file that you can download in the Personal Information Exchange (PFX) file format. To find out if your company has SSL requirements, see your Network Administrator.



5. Click **Save**.

HOW TO CONFIGURE THE PRIVACY SETTINGS FOR A SYSTEM

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Systems>Find Systems**. If you cannot see this menu, your user account does not have sufficient permissions to find systems.
3. Click the appropriate system link. The system page appears.
4. In the system page, click **Settings**. The system settings are shown.
5. Click the **Privacy** tab. Use the controls in this tab to define the privacy settings for access to the system. You have these options:

   ##### *HOW TO REMOVE USERS AND GROUP*

   If you want to remove a user or group from the privacy list, click the ✖ next to the desired item.

   > **Note:** By default, Pulse will automatically add your user name and any groups that your account belongs to as privacy settings for the system.

   ##### *HOW TO ADD A USER OR GROUP*

   a. In the **Privacy** tab, click **Add a user or group**.
   b. In the Add a User or Group dialog, do the following:
      i. In the entry field, type the user or group name to add. This populates the list with matching items from the Pulse database.
      ii. Place a check mark in the box next to the desired user account or group name.
      iii. Repeat these steps you have added all of the desired users and groups.
   c. Click **Add**.

   ##### *HOW TO DELETE A USER OR GROUP*

   a. In the **Privacy** tab, click the red "x" to delete the user or group. This removes that groups access permission to the system.
   b. Click **Save**.

HOW TO SPECIFY USER AND GROUP PERMISSIONS

Next to each user group, select one of the following settings from the drop-down list:

Option	Description
Owner	Provides full access to the system and its feeds. They can comment, post, add and remove content, adjust system settings, and add feeds.
Contributor	Provides users and group members with the ability to post content to the system and its feeds.
Commenter	Provides users and groups members with the ability to comment on system post and its feeds. This setting does not allow individuals to post content themselves.
Viewer	Provides users and group members with read-only access to the system and its feeds.

6. Click **Save**.

Adding and Configuring System Feeds

You can add and configure system feeds in Pulse.

HOW TO ADD FEEDS TO A SYSTEM

> **Important:** If you use the instructions below to add feeds for a Flare community, you must remap the topics in the Community tab of the Flare Target Editor. See "Integrating Flare and Pulse" on page 112.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Systems>Find Systems**. If this menu item is not available, your user account does not have administrator permissions.
3. Click the appropriate system link. The system page appears.
4. In the system page, click **Add Feed**. This opens the Add System Feed page. Next, you must configure the feed as described below.

HOW TO CONFIGURE A FEED

You can configure a variety of settings for a Pulse system feed.

> **Important:** If you use the instructions below to configure feeds for a Flare community, you must remap the topics in the Community tab of the Flare Target Editor. See "Integrating Flare and Pulse" on page 112.

1. Follow the steps above to add a new feed to a system.
2. In the Add System Feed page, enter the following information:
   - **System Feed Name** Type a name for the system feed (e.g., MadCap Software Blog).
   - **Description** Add a short description about the feed.
   - **Source** Select the source for the feed. You can select from a list of common formats for content syndication. You have these options:
     - **RSS 2.0 or Atom 1.0 Feed** This is the default option.
     - **Microsoft CRM**
     - **Pop3 Email Address**
     - **Exchange Web Services Email Address**

- **Feed Format** Select the format of the data for the feed. Choose one of the following options.
  - **Text** This is a text format for information interchange.
  - **Json** Short for "JavaScrip Object Notation." This is a text-based open standard for readable database interchange.
  - **Jws** Java Web Start. This is another means for information interchange.
- **Allow Impersonation** This option determines whether the system can post messages to the feed on behalf of the users in response to updates from the external source. Select **True** if you want the system to make posts for the users. Select **False** if you do not.
- **Source URL** Enter the source URL address of the feed you are adding to the system.
- **Poll Period (Minutes)** This determines the amount of time in minutes that the system waits in between polling the source for updates. Those updates are then added to the system feed.
- **Use Credentials** Check this check box if you want this feed to require credentials. Clicking this check box causes three additional fields appear. Use these fields to enter a user name, password, and domain name to use for credentialing.

3. Click **Create this Feed**. The feed is created and added to the system.

Finding Systems

Users who are members of the Administrators and Employees groups are permitted to find systems in Pulse.

HOW TO FIND SYSTEMS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Systems>Find Systems**. The Find Systems page appears.
3. The newest systems in the Pulse database will be displayed by default. You can search for a system in the **Search** field in the upper-right corner of the page. You can also filter the systems by clicking the down arrow in the upper-left corner of the page and selecting from the following options.
   - **New Systems** Displays the most recently created systems.
   - **Most Active Systems** Displays the systems with the most user activity.
   - **All Systems** Displays all systems that exist in the Pulse database.
4. Click any of the systems to go to the system's page.

> **Note:** You can also create a system in the Find Systems dialog by clicking **Create System**.

Using the Administration Menu

This feature is available to **Administrators** only.

In the Pulse dashboard, the Administration menu is available to members of the Administrators group. With the commands in this menu, you have the ability to modify the Pulse web server settings or to run reports.

Settings

The options in the Administration>Settings menu include:

- **Database** View the Pulse database settings. See "Pulse Database" on the following page.
- **General** View and configure the general settings for the Pulse web server. See "General Settings" on page 224.
- **Groups** Manage the default user groups and create new groups. See "Managing Groups" on page 234.
- **Suggested Feeds** Configure suggested feeds for your user groups. See "Suggested Feeds" on page 241.
- **Users** Add new users and perform user administration tasks. See "Managing Users" on page 243.
- **Log** View Pulse server events, errors, processes and tasks. See "Event Log" on page 255.
- **Communities** View a list of Flare communities that integrate with your Pulse systems. See "Communities" on page 257.
- **Synonyms** Manage a list of synonyms to enhance the search capabilities of a Flare community. See "Managing Synonyms" on page 259.

Reports

The functions in the Administration>Reports menu give you access to a variety of usage reports for both the Pulse system and your Flare communities. See "Reports" on page 267.

Pulse Database

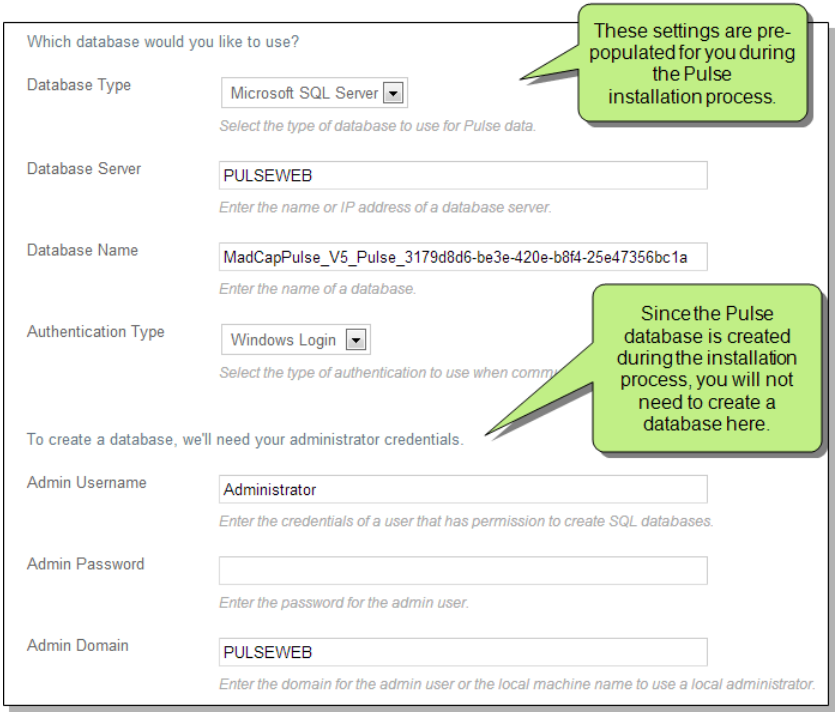
In the Pulse dashboard, the Administration>Settings menu command is available to members of the Administrators group. This gives administrators the ability to click **Database** to view connection information for the Pulse database.

Viewing the Database Settings

Use the following steps to view database settings.

HOW TO VIEW THE DATABASE SETTINGS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. Click **Database**. This opens the Database page.



Tip: Should you experience an issue in the future, it is recommended that you keep a record of these settings and store them in a safe place.

Understanding the Database Settings

The settings in Database page are pre-populated for you during the Pulse installation process. These settings supply the Pulse web server with connection information for the Pulse database server.

The table below details the settings in the Database page:

Item	Description
Database Type	This is the type of database being used for your Pulse data. It is always set to Microsoft SQL Server.
Database Server	This is the host name or IP Address of the Windows machine hosting the Pulse database server. **Important:** This setting must always correspond to a valid host name or IP Address. To avoid database connectivity issues, do not change the value in this field.
Database Name	The name of the SQL database hosting your Pulse content. **Note:** During the installation process, the DATA (.MDF) and LOG (.LDF) files are created in the default locations as specified by your SQL Server configuration.
Authentication Type	Depending on your specific configuration, this will be set to Windows Login or SQL Login.
Admin User Name	This is the valid Active Directory account with Administrator privileges to the SQL Server hosting Pulse.
Admin Password	This is the password for the Admin User Name detailed above.
Admin Domain	This is the Active Directory domain name.
Create Database	Because you create the database during the installation process, you will not use this feature. See "Installing Microsoft SQL Server" on page 47 and "Installing and Activating Pulse" on page 78.

General Settings

In the Pulse dashboard, the Administration>Settings menu command is available to members of the Administrators group. This gives administrators the ability to click **Settings** to view and update general system settings for the Pulse web server.

Viewing the General Settings

You will not typically need to modify the information in the General Settings page. However, you have the ability to both view and change the settings if needed.

HOW TO VIEW THE GENERAL SETTINGS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. Click **General**. This opens the General Settings page.

Tip: Should you experience an issue in the future, it is recommended that you keep a record of these settings and store them in a safe place.

Understanding the General Settings

The Pulse server and its settings are populated during the installation process. You can view the general settings by selecting the **Administration>Settings** menu command and then clicking **General**. You can make changes to your settings you have special requirements for your environment.

Setting	Description	Typical Setting/Format	Additional Information
Site URL	This is the URL that users will enter in their web browser to gain access to Pulse. In order for email and other settings to work properly, you must type the exact URL.	http://application.domain.com	This setting is pre-populated for you during the installation process. It is important to ensure that the Site URL exactly matches the DNS entry for your Pulse server. The Site URL is also included in outbound email notifications.

Setting	Description	Typical Setting/Format	Additional Information
Lync Application Name	If you have integrated Pulse with Microsoft Lync, type the application ID for the Microsoft Lync application here.	blank	Typically, this is left blank. It is only required when integrating direct messaging with Microsoft Lync. **EXAMPLE** Specify the ApplicationID for the UCMA Trusted application. `urn.application:pulsenotifications`
Restricted Word List	Click **Show** to reveal an entry field where you can type any words you would like to restrict from use in end user posts.	blank	Typically, this is left blank. Your environment may have a different requirement. If you choose to create a word list, always use comma-separated text. **EXAMPLE** `curse,darn,oops,`
Enable Customer Groups	Place a checkmark in this box to allow external users. See "Managing Users" on page 243.	checkmark=enabled	Typically, this is selected. Your environment may have a different requirement. A checkmark grants external users (i.e., Customers) access to Pulse. Remove the checkmark to revoke access.

Setting	Description	Typical Setting/Format	Additional Information
SMTP Host	This is the hostname or IP address of the SMTP relay that accepts incoming requests which is the host that will send outbound emails for Pulse.	exchange01 or smtp.example.com	Obtain this information from your company's Email Administrator.
SMTP Port	This is the port number of the SMTP server handing outbound emails.	25	Typically, the port number is 25. Your environment may have a different requirement.
SMTP Enable SSL	Place a checkmark in the box to enable Secure Sockets Layer (SSL).	checkmark=enabled blank=disabled	Typically, this feature is disabled. Your environment may have a different requirement.
SMTP Username	Type the user name of a valid account on the SMTP relay.	pulse@example.com	Obtain this information from your company's Email Administrator.
SMTP Password	Type the password for the valid account on the SMTP relay.	<password>	Obtain this information from your company's Email Administrator.
Incoming Mail Server Type	Select the type of incoming email server to use.	POP3 Exchange Web Services Poll the Local SMTP Drop Folder	Obtain this information from your company's Email Administrator.

Setting	Description	Typical Setting/Format	Additional Information
Notification Email Type	Set this to a single email address that does not change.	Static	Typically, this will be static. Your environment may have a different requirement.
Notification Email Address	Type a single email address that does not change.	`accountname@example.com`	Typically, it is PulseRegistration@example.com. Where example = your domain name. Your environment may have a different requirement.
Notification Email Display Name	The name that you want to appear as the sender in email notifications sent by Pulse.	Pulse Notifications	This defines the name that you want to appear in messages from the Notification Email Address.
Message Archive Task Frequency in Days	The frequency at which Pulse will run message archive task. When messages reach the age defined in the Message Archive Task Max Message Age in Day field, Pulse archives the messages. 0=off, 1=1 day, 2=2days, etc.	0 (off)	Typically, this feature is turned off. Your environment may have a different requirement.
Message Archive Task Max Message Age in Days	The maximum age a message can be until it is archived.	180	Typically, this is set to 180. Your environment may have a different requirement.

Setting	Description	Typical Setting/Format	Additional Information
Account Sync Period	The number of minutes the authentication providers will sync with Pulse.	0	Typically, this is set to 0. your environment may have a different requirement.
Always Use SSL	Place a checkmark in this box to redirect calls for http:// to https://.	checkmark=enabled blank=disabled	Typically, this feature is disabled. Your environment may have a different requirement.
Windows Auto Login IP Ranges	Define the range of IP addresses that will be permitted to automatically login to Pulseusing windows credentials. If a user attempts to login from an IP address outside of the defined range, Pulse will prompt for credentials.	0.0.0.0-10.10.10.10 (or the IP range for your environment)	Typically, this field is left blank. Your environment may have a different requirement.
User Profile URL	This is the redirect for when a user profile is clicked.	blank	Typically, this field is left blank. Your environment may have a different requirement.
Host Site URL	This is the redirect for the entire Pulse site.	blank	Typically, this field is left blank. Your environment may have a different requirement.

Setting	Description	Typical Setting/Format	Additional Information
SSO URL	Specify the URL for Single Sign-On (SSO).	blank	Typically, this field is left blank. Your environment may have a different requirement.
Use Video Encoding	Place a checkmark in this box if you have setup an encoding server. This gives you the ability to choose specific video encoding options for iPhone, iPad, and Android.	checkmark=enabled blank=disabled	Typically, this feature is disabled. Your environment may have a different requirement.
Log Retention	Specify the number of days to retain the error message log on the server.	30	The default value is 30. Your environment may have a different requirement.

Incoming Mail Server Type Settings

The Pulse web server can connect to a mail server using one of these methods:

POP3 MAIL SERVER SETTINGS

These settings give the Pulse server to use Post Office Protocol Version 3 (POP3) to collect incoming email (i.e., email replies to Pulse notifications):

Setting	Description	Typical Setting/Format	Additional Information

POP3 Host	Type the name of the host.	`pop3.example.com`
		or
		`10.10.18.222`
			Obtain this information from your Email Administrator or POP3 Service Provider.

POP3 Username	Type the username of a valid account.	`accountname@example.com`	
POP3 Password	Type the password for the account.	`<password>`	
POP3 Poll Task	This defines how frequently incoming mail is pulled by the server.	`1`	This is set to 0 by default. It is recommended that you set the value to "1."
POP3 Enable SSL	Place a checkmark in the box to enable Secure Sockets Layer (SSL).	blank=disabled	It is recommended that you leave this box blank. Your environment may have a different requirement.

EXCHANGE WEB SERVICES

These settings give the Pulse server the ability to connect to Microsoft Exchange Web Services for incoming email (i.e., email replies to Pulse notifications):

Setting	Description	Typical Setting/Format	Additional Information

EWS URL	Type the URL for your Exchange Web Services.	**EXAMPLES**
		`mail.us.example.com`
		`mail.emea.example.com`
			Obtain this information from your Email Administrator or EWS Provider.

EWS Domain	Type the domain name for your Exchange web services.	**EXAMPLE** `CORP`	

EWS Username	Type the username of a valid account.	`accountname@example.com`
		EXAMPLE
		`PulseRegistration@example.com`	

EWS Password	Type the password for the account.	`<password>`
		EXAMPLE
		`p@ssword1`	

EWS Poll Task	This defines how frequently incoming mail is pulled by the server.	`1`	This is set to 0 by default. It is recommended that you set the value to "1."

POLL THE LOCAL SMTP DROP FOLDER

These settings give the Pulse server the ability check the SMTP areas of Internet Information Services (IIS) for incoming email (i.e., email replies to Pulse notifications):

Setting	Description	Typical Setting/Format	Additional Information
SMTP Drop Folder	The path to the local message store on the SMTP server	`C:\Inetpub\Mailroot\Drop`	This server must exist on all nodes.
Folder Poll Task Frequency in Minutes	This defines how frequently incoming mail is pulled by the server.	`1`	This is set to 0 by default. It is recommended that you set the value to "1."

Configuring the Auto Login for Internal Windows Users

If you are using Active Directory to control access to Pulse, you can configure the Windows Auto Login IP Ranges feature. This gives individuals the ability to log into servers and workstations in the defined range, and automatically logs them into Pulseusing their windows credentials.

Note: To use this solution, you will need a valid IP address range or list of valid IP addresses to work with.

HOW TO CONFIGURE THE AUTO LOGIN FOR INTERNAL WINDOWS USERS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. Click **General**.

   This opens the General page. In the **Windows Auto Login IP Ranges** box, enter one of the following:

   - **An IP Address Range** For example, type: `10.0.0.0-10.255.255.255`. This permits all IP addresses within that range to log on automatically.
   - **Multiple IP Address Ranges** If you have multiple ranges, separate each range with a comma (,). For example, `0.0.0.0-10.10.10.10,192.168.0.0-255.255.255.255`.
4. Click **Save**.

Managing Groups

As an Administrator, you can manage groups in several ways.

Groups Types

When you install Pulse, the system automatically creates these pre-defined permission groups: Administrators, Employees, and Customers.

Default Group Name	Description
Administrators	Members of this group have the highest level of permissions.
Employees	Members of this group have fewer permissions than Administrators, but more permissions than Customers.
Customers	Members of this group have fewer permissions than Administrators and Employees

You may want to add new groups to manage membership permissions on your server.

E X A M P L E

Let's say your company develops a software product. As part of your company's sales efforts, there are individuals outside your organization who sell your products either as part of a solution or as part of a referral program. In this scenario, you may want to create separate groups named "Solution Providers" and "Referral Partners" and give each group Employee permissions.

Group Access Permissions

This table details the access permissions for the default Pulse groups:

User Activity	General Public	Customers Group	Employees Group	Administrators Group
Register for a New Account (One Account Per Email Address)	✓	✗	✗	✗
Read Access to Posting Activities in Topic Feeds	✓	✓	✓	✓
Search Posts in Topic Feed	✓	✓	✓	✓
Click a Star to Rate Topics	✓	✓	✓	✓
Edit User Profile	✗	✓	✓	✓
Upload Profile Image	✗	✓	✓	✓
Update Notification Preferences	✗	✓	✓	✓
Post Status Updates to Topics (Includes Options to Share a Video, Image or File)	✗	✓	✓	✓
Post Questions in Topic Feeds	✗	✓	✓	✓
Post Answers to Questions in Topic Feeds	✗	✓	✓	✓
Like/Dislike/Vote on Answers to Questions in Topic Feeds	✗	✓	✓	✓
Post Articles in Topic Feeds	✗	✓	✓	✓
Add Comment, Like, Follow and Tag User Posts	✗	✓	✓	✓
Subscribe to Topics	✗	✓	✓	✓

User Activity	General Public	Customers Group	Employees Group	Administrators Group
Delete and Edit Your Own Content	✗	✓	✓	✓
Assign Tasks to Yourself or Other Registered Pulse Users	✗	✓	✓	✓
View Task Assignments by Status	✗	✗	✓	✓
Customize the Your Apps list in the Community Tab	✗	✗	✓	✓
Mention and Message Other Users	✗	✗	✓	✓
Designate Topics as Favorites	✗	✗	✓	✓
Add Topics as Favorites	✗	✗	✓	✓
Contact and Mention Other Users	✗	✗	✓	✓
Filter and View Content (Including Comments, Images, and Files)	✗	✗	✓	✓
Create Groups for Audiences (Employees and Customers)	✗	✗	✓	✓
Delete Content Added by Other Users	✗	✗	✗	✓

Adding and Managing Groups

After adding a group, you can update a variety of settings to control access to Pulse.

HOW TO ADD A GROUP

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Groups**.

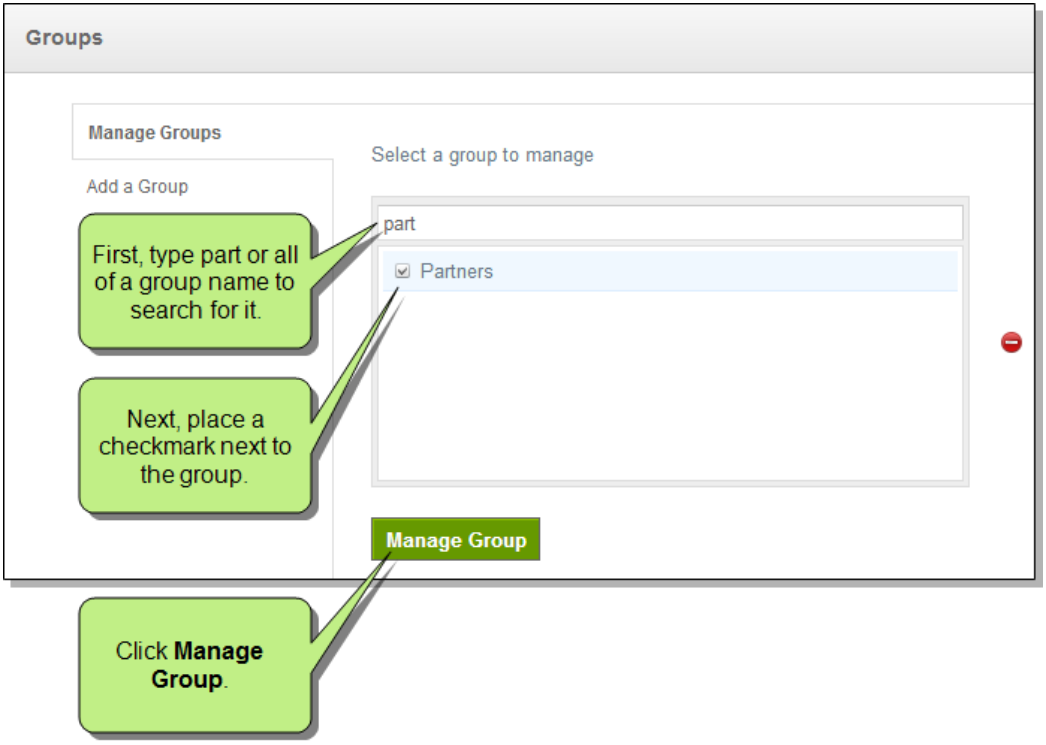
   The Groups page opens. By default, the Manage Groups tab is active in this page.
4. Below the Manage Users tab, click **Add a Group**. The Create a Group dialog opens.
5. In the Create a Group dialog, type the following information:
   - **Name** Type a name for the group. For example, type `Partners`.
   - **Description** Type a short description for the group. For example, type `This is a group for partners`.
6. Click **Create Group**.

HOW TO SELECT A GROUP TO MANAGE

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Groups**.

   The Groups page opens. By default, the Manage Groups tab is active in this page.
4. Below the Manage Users tab, click **Manage Groups**.
5. In the **Select a group to manage** box, type part or all of a group name. Then press **Enter**. For example, type `part`.

6. Place a checkmark next to the group that you want to manage. For example, select **Partners**.



7. Click **Manage Group**.

   Information about the group appears in the Manage Groups page. There are three tabs: Basic, Membership, and Advanced.

HOW TO UPDATE BASIC GROUP SETTINGS

1. Select the group to manage (see above). In this example, we will select the Partners group that we added.
2. In the **Basic** tab, change the following information as desired:
   - **Name** The name of the group. For example, `Partners`.
   - **Description** A description to help identify the group. For example, `This is a group for partners`.
   - **Group Type** Sets access permission for group member. You can select either **Employee** or **Customer**.

     Note: Pulse only permits one Administrators group, which is created default.
3. Click **Save**.

HOW TO UPDATE GROUP MEMBERSHIP

1. Select the group to manage (see above).

   Information for the selected group should now appear in the Manage Groups page. You will see three tabs: Basic, Membership, and Advanced.
2. In the **Membership** tab, you have these options:
   - **Add a Member** In the **What users are members of this group?** box, type a full or partial name. Then place a checkmark next to the user name(s) that you want to add to the group.

     Note: When a user is added to multiple groups, their level of system access corresponds to group with the highest permissions. For example, if a user belongs to both the Employees and Customers group, the user will be granted all of the permissions for the Employees group.
   - **Remove a Member** Clear the checkmark next to the appropriate user name to remove the select user(s).

     Note: If a registered user is not a member of any group, the system provides that user with the same permissions as members of the Customers group.
3. Click **Save**.

HOW TO UPDATE THE ADVANCED GROUP SETTINGS

1. Select the group to manage (see above).

   Information for the selected group should now appear in the Manage Groups page. You will see three tabs: Basic, Membership, and Advanced.

2. Select the **Advanced** tab.
3. In the **Host Site URL** box, type the URL of the site that hosts Pulse.

   Important: It is strongly recommended that you do not change the default settings.

4. Click **Save**.

HOW TO DELETE A GROUP

1. Select the group to manage (see above).
2. Place a check mark next to the group to delete.
3. Click the button.

   Note: The default Administrators, Employees, or Customers groups cannot be deleted. Members of the Administrators group have permissions to delete both the groups they create, as well as groups created by other Administrators.

   The Confirm Delete Group dialog opens.

4. In the Confirm Delete Group dialog, click **Delete Group** to remove it.

Suggested Feeds

In the Pulse dashboard, the Administration>Settings menu command is available to members of the Administrators group. This gives administrators the ability to click the **Suggested Feeds** feature. This lets administrators use Pulse as a content distribution network by adding feeds to Pulse. Administrators can set up suggested feeds to make them available to users who belong to the Administrators or Employees group.

Adding a Suggested Feed

Use the following steps to add a suggested feed.

HOW TO ADD A SUGGESTED FEED

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Suggested Feeds**.
4. In the Suggested Feeds tab, click **Add a Suggestion List**.
5. Create the feed by doing the following:
   a. **Name** Type a name for the feed.
   b. **Automatic Follow** Select whether users should be automatically subscribed as followers to the new feed. You can select **Yes** or **No**.
   c. **Suggest To** Select the audience to whom you are making the suggestion. You can select **Administrators** or **Employees**.
6. Click one of these tabs: **People**, **Groups**, or **Tags**. Then type part of the item you want to search for and place a check mark next to the item you want to select.
7. Click **Ok** to save the new feed.

The next step is to configure the suggested feed.

Configuring a Suggested Feed

Use the following steps to configure a suggested feed.

HOW TO CONFIGURE A SUGGESTED FEED

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Suggested Feeds**.
4. In the **Select a Suggestions List to Manage** box, place a check mark next to the desired list. Then click **Configure**.
5. Create the feed by doing the following:
   a. **Name** Type a name for the feed.
   b. **Automatic Follow** Select whether users should be automatically subscribed as followers to the new feed. You can select **Yes** or **No**.
   c. **Suggest To** Select the audience to whom you are making the suggestion. You can select **Administrators** or **Employees**.
6. Click one of these tabs: **People**, **Groups**, or **Tags**. Then type part of the item you want to search for and place a check mark next to the item you want to select.
7. Click **Ok** to save the configuration changes.

Removing a Suggested Feed

Use the following steps to remove a suggested feed.

HOW TO REMOVE A SUGGESTED FEED

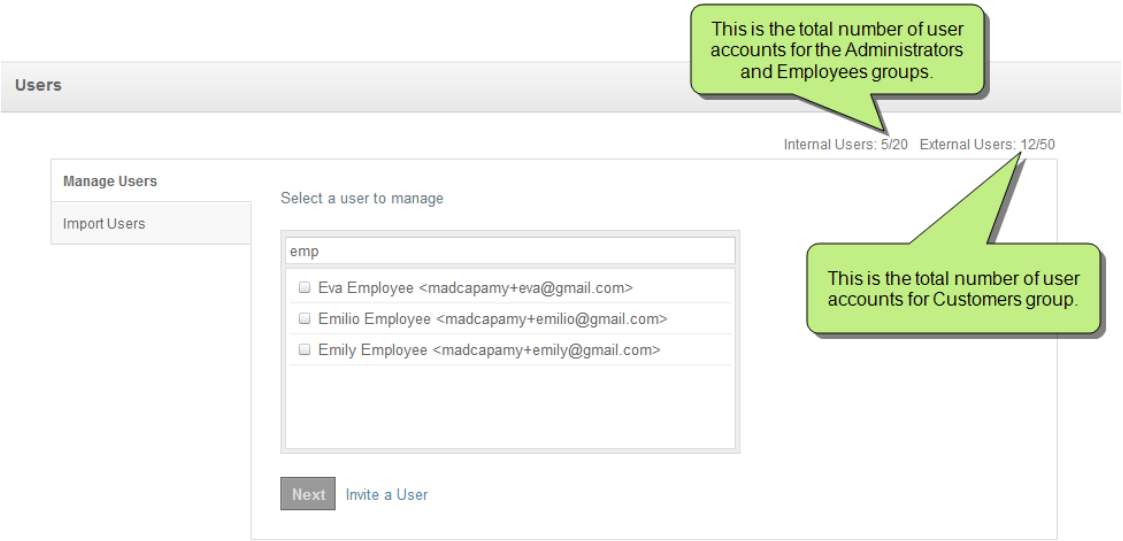
1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Suggested Feeds**.
4. In the **Select a Suggestions List to Manage** box, place a check mark next to the desired list. Then click **Remove**.
5. In the confirmation message, click **Remove Suggestion List**. This removes the selection from the Suggested Feeds list.

Managing Users

In the Pulse dashboard, the Administration>Settings menu command is available to members of the Administrators group. This gives administrators the ability to click the **Users** feature to add new users and perform user administration tasks on the Pulse web server.

Types of Users

When you open the Users page, you will notice counts showing the total number of users:



- **Internal Users** This is the total number of user accounts associated with the Administrators and Employees groups. These are the individuals responsible for administering and/or moderating Pulse. The PulseAdmin account is not included in this total.
- **External Users** This is the total number of user accounts for the Customers group. These are the users who will typically log in to Pulse and use the community features in the Flare output.

User access to Pulse tools and features is governed by group membership. There are four access levels for users:

Group Name	Access Level	User Type
Administrators	Full Access	Registered
Employees	Advanced Access	Registered
Customers	Limited Access	Registered
-	Restricted Access	Unregistered

Note: By default, registered users who are not explicitly added to a group are granted the same access privileges as members of the Customers group.

In addition to the default groups above, Administrators can create more groups. See "Managing Groups" on page 234.

Creating an Administrator Account

Although a default administrator account named "PulseAdmin" is created during the initial server configuration (see "Pulse Server Configuration" on page 89), it is strongly recommended that you create a "standard" user account and assign it administrative permissions for day-to-day administrative operations.

Note: The default PulseAdmin account gives the account holder permission to log on to the Pulse server and perform administrative tasks, such as installing software and changing the network configuration. A "standard" account with administrative privileges simply gives the account holder to perform day-to-day administrative operations for the Pulse system.

HOW TO CREATE AN ADMINISTRATOR ACCOUNT

1. Log in to the Pulse dashboard using the default PulseAdmin account. See "About the Pulse Dashboard" on page 163.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is selected.
4. In the **Manage Users** tab, click **Invite a User**. This opens the Invite User page.
5. Type the following information in these fields. An asterisk (*) denotes a required field:
   - ***First Name** The first name of the user.
   - ***Last Name** The last name of the user.
   - ***Email Address** A valid email address for the user.
   - **Title** A title for the contact, such as a professional or job title.
   - **Department** A department name for the user, such as Engineering or Sales.
   - **Location** A location for the user, such as La Jolla or New York City.
   - **Cell** A mobile phone number for the user.
   - **Phone** A telephone number for the user.
6. In the **Group** area, place a check mark in the **Administrators** box.
7. When you are satisfied with the invitation, click **Send Invite**.
8. In the User Invite dialog, click **Ok** to close the message confirming that the invitation was sent.

When the email message arrives, follow the instructions to log in to Pulse. See "Logging In to Pulse" on page 288.

Inviting New Users to Pulse

Members of the Administrators group have permissions to send Pulse invitations to other individuals by e-mail.

MINIMUM USER ACCOUNT REQUIREMENTS

In order to send an email invite to users asking them join a Pulse community, you need their basic user information. This list details the minimum user account requirements:

- **First Name** The first name of the user.
- **Last Name** The last name of the user.
- **Email Address**A valid email address for the user.
- **Groups** The desired group membership for the user. A user can be a member of one or more groups. The default groups are: Administrators, Employees, or Customers. See "Managing Groups" on page 234.

HOW TO INVITE A SINGLE USER

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is selected.
4. In the **Manage Users** tab, click **Invite a User**. This opens the Invite User page.
5. Type the following information in these fields. An asterisk (*) denotes a required field:
   - ***First Name** The first name of the user.
   - ***Last Name** The last name of the user.
   - ***Email Address** A valid email address for the user.
   - **Title** A title for the contact, such as a professional or job title.
   - **Department** A department name for the user, such as Engineering or Sales.
   - **Location** A location for the user, such as La Jolla or New York City.
   - **Cell** A mobile phone number for the user.
   - **Phone** A telephone number for the user.
   - **Custom Message** A message to include in the body of email invitation sent to the user.
   - **Allow Impersonation** Always leave this check box blank.

6. In the **Group** area, place a check mark in the appropriate group name box(es) to add the user to one or more groups. You must select at least one group to send an invite.

> **Note:** When users belong to more than one group, they are granted the combined access for all the groups to which they belong.

7. When you are satisfied with the invitation, click **Send Invite**.
8. In the User Invite dialog, click **Ok** to close the message confirming that the invitation was sent.

HOW TO BULK INVITE USERS

If you would like to bulk invite users to join Pulse, members of the Administrators group can import users by importing a comma-separated values (CSV) file.

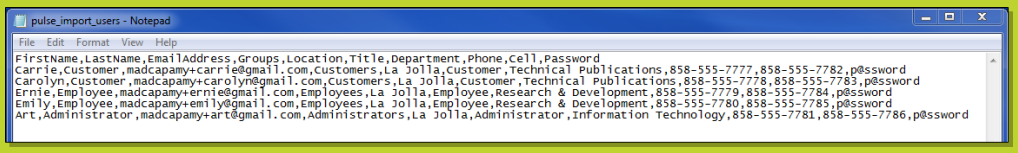
CSV FILE REQUIREMENTS

To successfully import user data from CSV, keep the following in mind:

- **Import a CSV File** The file must be saved in the CSV format.
- **Include Column Headings in the Top Data Row** Always use the first data row to define the column headings. Column headings must use exact spelling shown in the table below under "Column Name."
- **Column Order is Not Important** As long as you have named the column headings as required, the order of your columns is not important.
- **Table Must Contain At Least One Data Row** At a minimum, the file must contain at least one row of data.
- **Always Include the Required Columns** At a minimum, the user data you plan to import must contain these columns: `FirstName`, `LastName`, `EmailAddress`, and at least one assignment for `Groups`.

E X A M P L E

Below is an example of a properly formatted CSV file:



In order to successfully import CSV-formatted user data into the system, see the information in the table below:

Column Name	Format	Required Column	Description
FirstName	text **EXAMPLE** Enter the first name of the user: `Emily`	✓	The first name of the user.
LastName	text **EXAMPLE** Enter the last name of the user: `Smith`	✓	The last name of the user.
EmailAddress	email address **EXAMPLE** Enter a valid email address: `emily@example.com` A valid email address includes the account (emily), the ampersand (@) and the domain (example.com).	✓	valid email address ***IMPORTANT*** **Important:** The email address is the unique identifier for the account. The email address cannot be changed once an account is created.

Column Name	Format	Required Column	Description

Groups	text
	
	EXAMPLE
	
	To add the user to a single group, enter the group name. For example:
	
	`Customers`
	
	To add the user to multiple groups, enter the group names and separate them with the semicolon (;). For example:
	
	`Administrators,Employees`
		✓	This in the group name (or names) in Pulse.
			
			To add a user to multiple groups, separate the group names using a semicolon (;).

Location	text	✗	This can be used to specify the user location. This might be a facility, city, town, state or region.
Title	text	✗	This is the user's professional title.
Department	text	✗	This is the user's department.
Phone	telephone number	✗	This is the account holder's telephone number. Always use a dash (-) to separate the area code, prefix and line number. For example, 000-000-0000.
Cell	telephone number	✗	This is the users mobile number. Always use a dash (-) to separate the area code, prefix and line number. For example, 000-000-0000.
Password	text	✗	This is the password for the user account. It must be a minimum of 7 characters in length.

HOW TO IMPORT USERS FROM CSV

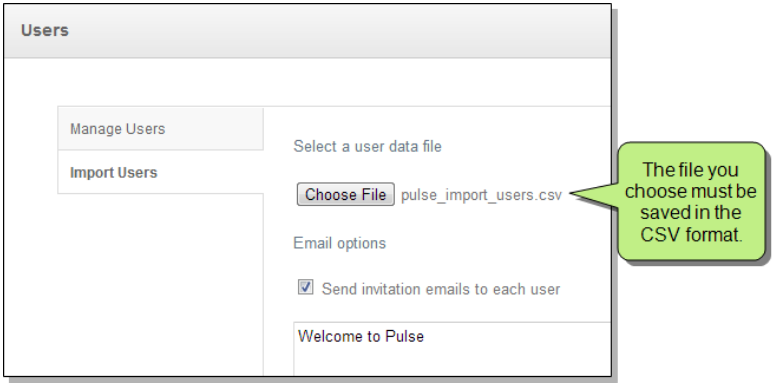
Follow these steps to import users into Pulse.

Important: If you are syncing Pulse with Microsoft Active Directory (AD), you will not need to import your AD users.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is active in this page.
4. Click the **Import Users** tab.
5. Under Select a User Data File, click the **Choose File** button.

   Note: The file that you using for the import must be saved in the CSV file format. The data in the file must also meet the requirement defined above.

6. In the Open dialog for Windows, find the file that you want to open. Then, double-click the file or highlight it and click **Open**.



7. Under **Email Options**, place a checkmark in the **Send invitation emails to each user** box.
8. Type a message in the text box. The system includes the message "Welcome to Pulse" by default.
9. Click **Import**.

Note: If the import is not successful, an error message appears. Most failed import attempts are due to a format error in your data file. Be sure to review the requirements for CSV files above. Then, try the import again.

10. Click **Back** to return to the Import users page. Until your users log in to Pulse for the first time, you will not be able to find them in the Manage Users list.

HOW TO RESEND AN INVITE

Administrators can resend invitations to users that have not yet registered for Pulse.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is active in this page.
4. In the **Manage Users** tab, select the user to mange by following these steps:
   a. Type part of all of the user name.
   b. In the selection list, place a checkmark in the box next to the desired username.
5. Click **Next**.
6. In the User Details page, click **Resend Invite**.

   Note: This option is only available if the user has not yet activated their Pulse account.

7. In the User Invite dialog, click **Ok** to close the message that the invitation has been sent.

The user can click the link in the invitation to log into Pulse for the first time.

Deleting/Disabling Use Accounts

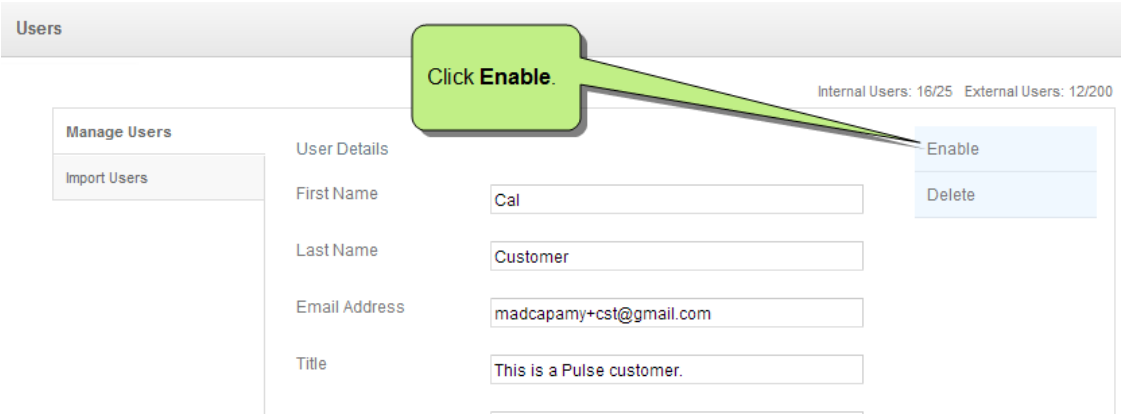
You can disable, enable, and delete user accounts.

HOW TO DISABLE A USER ACCOUNT

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
4. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is active in this page.
5. In the **Manage Users** tab, select the user to mange by following these steps:
    a. Type part of all of the user name.
    b. In the selection list, place a checkmark in the box next to the desired username.
6. Click **Next**.
7. In the User Details page, click **Disable**.
8. In the Confirm Disable dialog, click **Disable**.

HOW TO ENABLE A DISABLED ACCOUNT

To enable a disabled account use the same steps as above, click **Enable** in the User Details page.



Members of the Administrators group have permissions to delete users in Pulse. After deleting a user, the user will no longer be able to sign in to Pulse.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is active in this page.
4. Click the **Manage Users** tab.
5. Select the user to manage:
   a. Type part of all of the user name. For example, type `cal`.
   b. In the selection list, place a checkmark in the box next to the desired username. For example, select `Cal Customer`.
6. Click **Next**.
7. In the User Details page, click **Delete**.
8. In the Confirm Delete User dialog, click **Delete**. The user will not longer be able to log in to Pulse.

Note: Deleting a Pulse user removes all access to Pulse. To give a user the ability to re-use the email address in Pulse, you must also delete the user from the dbo.Users and dbo.Login tables in SQL Server instance for the Pulse database. Once the entries are deleted, the email can be used to create a new Pulse account.

Event Log

In the Pulse dashboard, the Administration>Settings menu command is available to members of the Administrators group. This gives administrators the ability to access the **Log** feature when you want to view and research events in the Pulse log.

Pulse Event Logs

The Pulse log shows the following events and information:

Field	Description
EventType	The type of event. For example, critical, error, or warning.
CreatedUTC	The date and time steps the event occurred.
MachineName	They Pulse web server name.
Url	Click to open a URL with more information.
ProcessName	Shows the name of the process.
ExceptionType	Lists events that required special processing.

Viewing Event Logs

Use the following steps to view the event log.

HOW TO VIEW THE EVENT LOG

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In Settings page, click **Log**. The Pulse event log opens.
4. From the drop-down list, select one of these filters:
   - **Show All** Select this item to reveal all logged events.
   - **Critical** Select this item to reveal a list of critical events that have occurred. Critical errors can lead to system disruption/failure, so it is important to take corrective actions.
   - **Error** Select this item to reveal a list of events that can potentially lead to system disruption/failures, so it is import to locate errors and determine if preventative or corrective action is needed.
   - **Warning** Select this item to view a list of events that are not significant, but may indicate of a future issue.
   - **Information** Select this item to show events that completed successfully.

- **Verbose** Select this item to reveal more detailed information about the issue. This is a helpful option to look at should you need to perform troubleshooting.

5. (Optional) If you want to search the log, enter your search terms in the **Query** field. Then click **Search**.
6. (Optional) If you want to clear the Query field of any search terms, click **Reset**.

Communities

In the Pulse dashboard, the Administration>Settings menu command is available to members of the Administrators group. This gives you the ability to click **Communities** to view a list of the Flarecommunities that have been integrated with Pulse.

A community is a collection of registered users that have access to a set of social features. When a Flare community is integrated with a Pulse system, users have access to the same type of community functions that one would find on a social media site.

Managing Flare Communities

Use the following steps to manage Flare communities.

HOW TO MANAGE FLARE COMMUNITIES

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. Click **Communities**. The Communities page opens. This shows a list of all the communities that have been integrated with Pulse. See "Integrating Flare and Pulse" on page 112.

Adding Communities

Use the following steps to add a community.

To integrate a Pulse system with your Flare output, you must:

1. **Add a New Community or Select an Existing Community in the Flare Target** Use the Community tab in the Target Editor in Flare to add a community to Pulse. This automatically creates a new community in the Flare community. It also generates a corresponding Pulse system. This gives end users viewing your Flare content the ability to register a user account, join the community, and use the community features.

   To integrate a Flare community with a Pulse system, it is recommended that you always add the community using the Flare user interface, rather than using the Pulse dashboard. See "Integrating Flare and Pulse" on page 112.

2. **Build and Publish Your Flare Target** When you build and publish your Flare target, the Pulse system features are integrated with the Flare output.

MINIMUM COMMUNITY REQUIREMENTS

Before you can add a Flare community to Pulse, you must know the following information:

- **Community Name** You must know the name for the Flare community you plan to create. You can name the community anything you want. Since communities correspond to the Flare target that you publish, it is recommended that you pick a name that corresponds with your target.
- **Key** You must have a valid key for the Pulse database. This key is automatically created for you when you install the SQL Server Database.

RENAMING A COMMUNITY

To rename a Flare community and its associated Pulse system, it is recommend that you always make the changes using the Flare user interface, rather than using the Pulse dashboard. See "Integrating Flare and Pulse" on page 112.

DELETING A COMMUNITY

For best results, it is recommended that you always delete a Flare community using the Flare user interface, rather than using the Pulse dashboard. See "Integrating Flare and Pulse" on page 112.

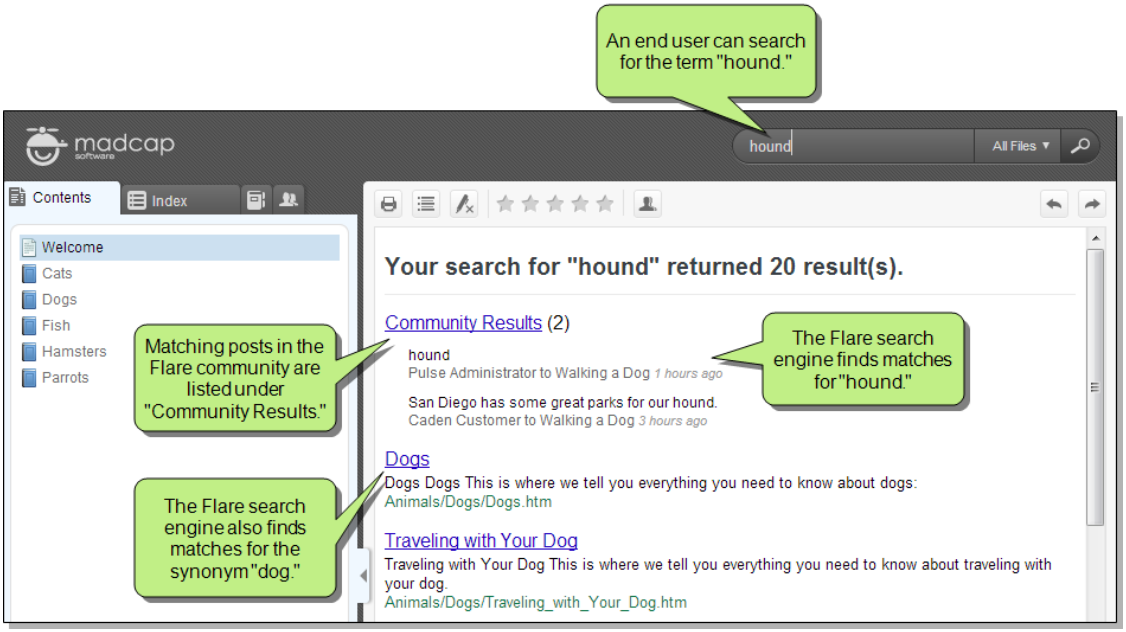
Managing Synonyms

In the Pulse dashboard, the Administration>Settings menu command is available to members of the Administrators group. This gives administrators the ability to create synonyms to enhance the search capabilities of the Flare search engine.

Working with Synonyms

You can enhance the Flare search engine by creating a synonym file for interchangeable words. This gives the Flare search engine to ability to return results that include a similar word, when a user enters a particular word. For example, when a user searches for "hound," the synonym file tells the Flare search engine to also return results that include the synonym "dog."

When integrated with Pulse, the Flare search engine will search both the Flare topic files and the embedded Pulse discussion forms.



There are two ways to create a synonym file to enhance the search capabilities for your Flare output:

- **Using the Flare Synonym Editor** You can create synonyms directly in the Flare user interface. See the Flare online Help.
- **Use the Synonyms Feature in Pulse** Members of the Administrators group can add synonyms to Pulse. If desired, you can also export the synonym file from Pulse and import it into the desired Flare project as described below.

Adding Synonyms in Pulse

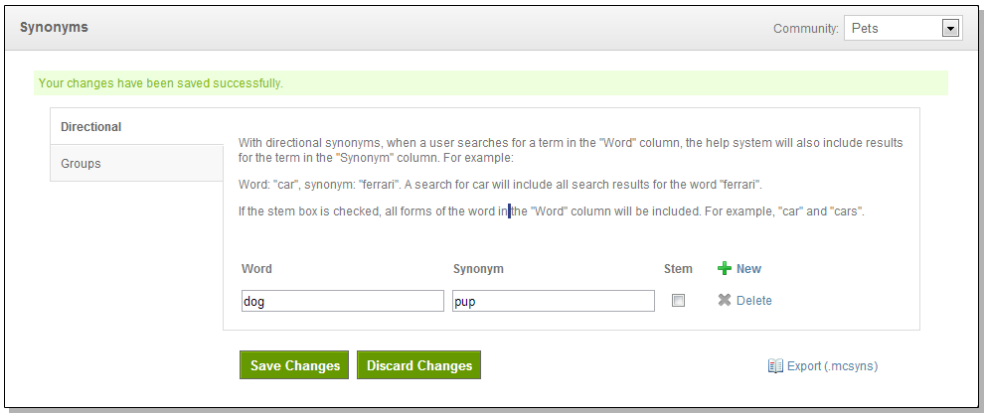
You can add two types of synonyms in Pulse: A directional synonym or a synonym group.

HOW TO ADD A DIRECTIONAL SYNONYM

A directional synonym is a word that can only be queried in a single direction. For example, a query for the word "dog" would find results that include the synonym "poodle." However, because the synonym only works in one direction, a query for "poodle" would not find results for "dog."

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens.
4. Select the **Directional** tab.
5. From the **Community** drop-down list, select the desired Flare community.
6. In the **Directional** tab, click **New**.

   A new, blank row for data entry is shown.
7. In the entry fields, do the following:
   a. In the **Word** field, type the desired word. For example, type `dog`.
   b. In the **Synonym** field, type the synonym to include in search results when end users search for the corresponding word. For example, type `pup`.



> **Important:** When adding synonyms, the word and synonym must be a single word. The synonym feature does not support phrases, punctuation, or languages.

> **Important:** Synonyms are case-sensitive.

8. (Optional) You can place a checkmark in the **Stem** box. This gives the search engine the ability to include all forms of the word in the search. For example, a search for "dog" will include "dogs."
9. Click **Save Changes**. A confirmation message appears when the save is successful.

> **Important:** In order for your changes to take effect, you must re-publish your Flare output.

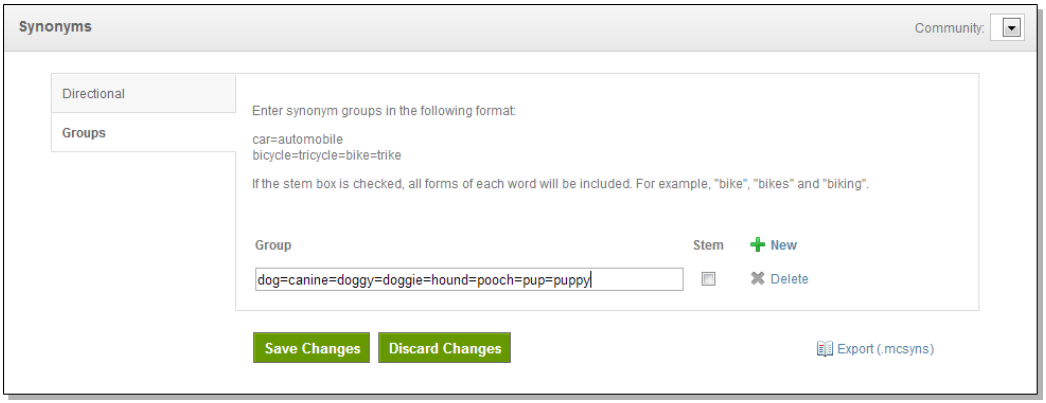
HOW TO ADD A SYNONYM GROUP

Add a synonym group to perform queries for identical synonyms. An identical synonym is a word that can be queried in two directions. For example, a query for the "dog" would find results that include identical synonyms such as "hound" and "canine." A search for "canine" or "hound" would include the identical synonym "dog."

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens. By default, the Directional tab is active in this page.
4. In the **Community** drop-down list, select the desired Flare community.
5. Select the **Groups** tab, then click **New**.

   A new, blank row for data entry is shown.
6. In the **Group** field, type the word follow by the equal (=) symbol, and then type a list of synonyms. You must separate each synonym with a comma (,).

   For example, type: `dog=canine=doggy=doggie=hound=pooch=pup=puppy`.



7. (Optional) You can place a checkmark in the **Stem** box. This gives the search engine the ability to include all forms of the word in the search. For example, a search for "dog" will include "dogs."
8. Click **Save Changes**. A confirmation message appears when the save is successful.

Managing Synonyms

You can delete, export, copy, and overwrite synonyms.

HOW TO DELETE A DIRECTIONAL SYNONYM

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens.
4. Select the **Directional** tab.
5. Next to the synonym that you want to remove, click **Delete**. This immediately removes the synonym from the list.
6. Click **Save Changes**.

HOW TO DELETE A SYNONYM GROUP

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens.
4. Select the **Groups** tab.
5. Next to the synonym group that you want to remove, click **Delete**. This immediately removes the synonym group from the list.
6. Click **Save Changes**.

EXPORTING A SYNONYM FILE FROM PULSE

If you want to use the same synonyms that you created for Pulse in a search of the Flare output, you can export the synonym file from Pulse. Then copy it into your Flare project.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens. By default, the **Directional** tab is active in this page.
4. Click the **Export (.mcsyns)** link at the bottom of the page.

   This downloads a copy of the synonyms file to your computer. The next step is to copy the synonym file to the Flare project.

Note: The downloaded file is saved in the MCSYNS file format, so you can import it into your Flare project. If you are not able to download the file, check your browser's download settings.

COPYING A SYNONYM FILE TO A FLARE PROJECT

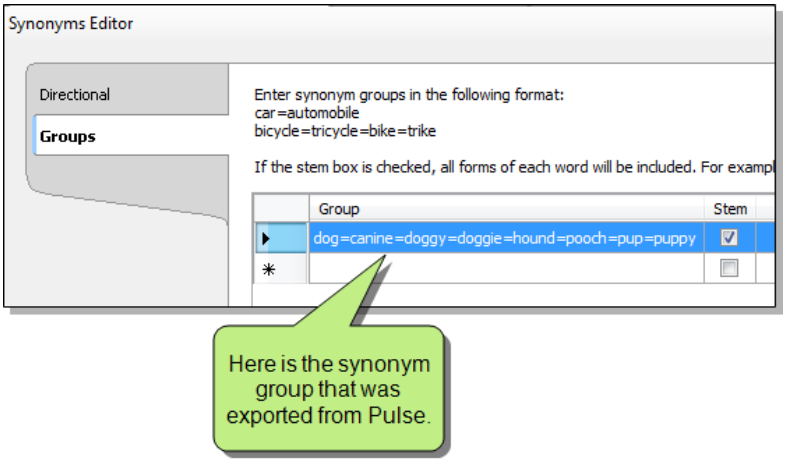
1. Add or make changes to the synonyms in Pulse.
2. Export the synonym file from Pulse.
3. Ensure that the Flare project where you plan to copy the file is closed.
4. Double-click the synonym file to open it. This starts the Flare program.

   Important: If the Flare project where you are planning to copy the file is open, an error messages appears to inform you the desired Flare project is already open in another instance. Close the open Flareproject and then open the synonym file again.

5. In the Copy to Project dialog, select the project where you want to copy the synonym file. Then click **Copy**.

   The program copies the file to the selected project and places it in the \Project\Advanced folder in the Flare project. It also opens the file in the Synonyms Editor.

6. In the Synonyms Editor, ensure that your synonyms appear. In this example, we added a synonym group.



7. Click to save your work.

OVERWRITING A SYNONYM FILE IN FLARE

1. Make changes to the synonyms in Pulse.
2. Export the updated synonym file from Pulse.
3. Ensure that the file than you exported has the exact same file name as the synonym file in the Flare project. You may need to rename this file to match.
4. Ensure that the Flare project where you plan to copy the file is closed.
5. Double-click the synonym file to open it. This starts the Flare program.

   Important: If the Flare project where you are planning to copy the file is open, an error messages appears to inform you the desired Flare project is already open in another instance. Close the open Flareproject and then open the synonym file again.

6. In the Copy to Project dialog, select the project where you want to copy the synonym file. Then click **Copy**.

   The program copies the file to the selected project and places it in the \Project\Advanced folder in the Flare project. The program also opens the file in the Synonyms Editor.

   When Flare recognizes that a target file with the same file name exists, the Copy File dialog appears.

7. In the Copy File dialog, make sure that the appropriate source file and target file names appear. Then click **Overwrite**.
8. In the Synonyms Editor, ensure that your updated synonyms appear.
9. Click to save your work.

Reports

Pulse provides members of the Administrators group with access to a variety of system- and community-specific reports.

Report Types

From the Pulse dashboard, you can generate report information about each Flarecommunity that you've set up. You can also run system-wide reports that show usage information for the entire Pulse system.

COMMUNITY REPORTS

The following table details the community reports. Data is presented in reprots for the selected community for the date period you specify. Each report lets you select a chart type from the Style list.

Report Name	Description	Export Report Data?	
		CSV	TXT
Browser Statistics	See which browsers are being used to view your online output.	✓	✓
Context-Sensitive Help Calls	See context-sensitive Help identifiers that have been invoked at least once in the output.	✓	✓
Operating System Statistics	See which operating systems are being used to view your online output.	✓	✓
Search Phrases	See all search queries made to the output.	✓	✓
Search Phrases with No Results	See all search phrases that didn't produce any results.	✓	✓
Topics	See all topics in the output that have been viewed at least once.	✓	✓

SYSTEM REPORTS

The following table details the system reports.

Report Name	Description	Chart Style	Export Report Data?	
			CSV	TXT
User Count	See the number of users who have posted to the Pulse system. This presents data for all communities combined during the date period you specify.	Line	✓	✗
Overall Activity	See the overall activity in Pulse. This presents data for all communities combined during the date period you specify.	Line	✓	✗
User Activity	See Pulse activities for a specific user. This presents data for one selected user for the date period you specify.	Line	✓	✗
Most Active People	See the most active users. This presents data for all system users for the date period you specify.	Column	✓	✗
Most Active Groups	Shows the most active groups and embedded discussions in the project.	Column	✓	✗
Most Followed People	See the users with the most followers.	Column	✓	✗
Most Liked People	See the most liked users for the time period you specify.	Column	✓	✗
Most Commented People	See the users with the most comments on their posts for the time period you specify.	Column	✓	✗
Most Liked Activities	See the activities that have the most likes for the time period you specify.	Column	✓	✗
Most Commented Activities	See the activities that have the most comments for the time period you specify.	Column	✓	✗

Report Name	Description	Chart Style	Export Report Data?	
			CSV	TXT
Most Liked File Shares	See the shared files that have the most likes for the time period you specify.	Column	✓	✗
Most Commented File Shares	See the shared files that have the most comments for the time period you specify.	Column	✓	✗
Most Liked Image Shares	See the shared images that have the most likes for the time period you specify.	Column	✓	✗
Most Commented Image Shares	See the shared images that have the most comments for the time period you specify.	Column	✓	✗
Most Liked Link Shares	See the shared links that have the most likes for the time period you specify.	Column	✓	✗
Most Commented Link Shares	See the shared links that have the most comments for the time period you specify.	Column	✓	✗
Storage Usage	See the storage being used by shared files and images for the time period you specify.	Line	✓	✗

Running and Formatting Reports

You can run and format a variety of different reports in Pulse.

HOW TO RUN A REPORT

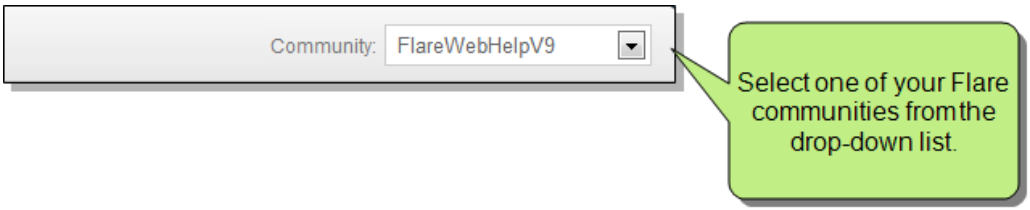
1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration>Reports**. The Reports page opens.
3. Click the desired report name to open it. The available formatting options depend on whether you are running a community or system report.

   HOW TO FORMAT A COMMUNITY REPORT

   Following are ways to format a community report.

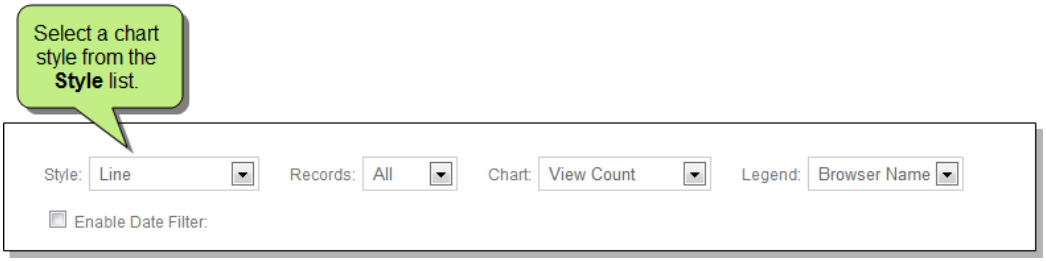
   HOW TO SELECT A COMMUNITY

   If the selected report supports the ability to filter data for each Flare community in your Pulse system, select one of your communities from the **Community** list.



HOW TO SELECT A CHART STYLE

If the selected report supports the ability to select a style for rendering your chart data, select one of the available chart styles from the **Styles** drop-down list.



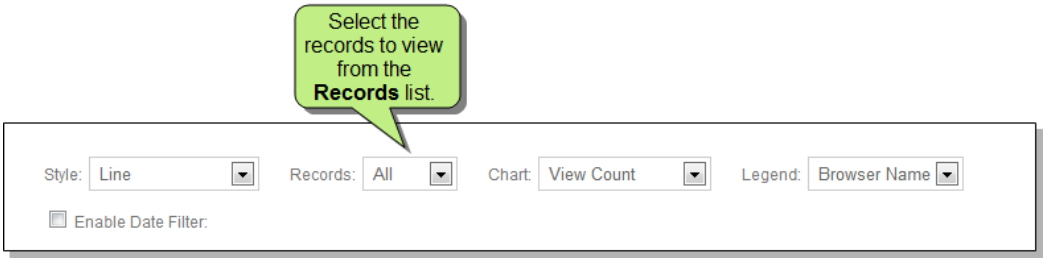
The table below details the available chart styles:

Style	Description
Area	Compares two or more quantities and is used to represent cumulative totals.
Bar	Compares multiple data points using horizontal bars with lengths that are proportional to the values represented.
Box Plot	Summarizes the statistical distribution of multiple data points using box and whisker plotting.
Bubble	Represents data points using bubbles.
Column	Compares multiple data points using vertical bars with lengths that are proportional to the values represented.
Doughnut	Depicts numerical proportion. Like a pie chart, the length of each section in the chart is proportional to the quantity it represents. The only difference is that a pie chart does not have a hollow center.
Line	Connects a series of data points using straight line segments.
Pie	Depicts numerical proportion. The length of each section in the chart is proportional to the quantity it represents.

Style	Description
Point	Represents data values using points.
Spline	Similar to a line chart, only the line used to draw the data points use a fitted curve.
Spline Area	Similar to an area chart, only the line used to draw the data points use a fitted curve.
Stacked Area	Similar to an area chart in that it compares two or more quantities and is used to represent cumulative totals. However, it also shows the relationship of the part to the whole.
Stacked Bar	Similar to a bar chart in that it compares multiple data points using horizontal bars with lengths that are proportional to the values represented. However, it also shows the relationship of parts to the whole.
Stacked Column	Similar to a column chart in that it compares multiple data points using vertical columns with lengths that are proportional to the values represented. However, it also shows the relationship of parts to the whole.
Step Line	Connects data points together using horizontal and vertical lines.

HOW TO FILTER REPORT RECORDS

If the selected report supports the ability to filter the records that you include, select one of the listed options from the **Records** drop-down list.

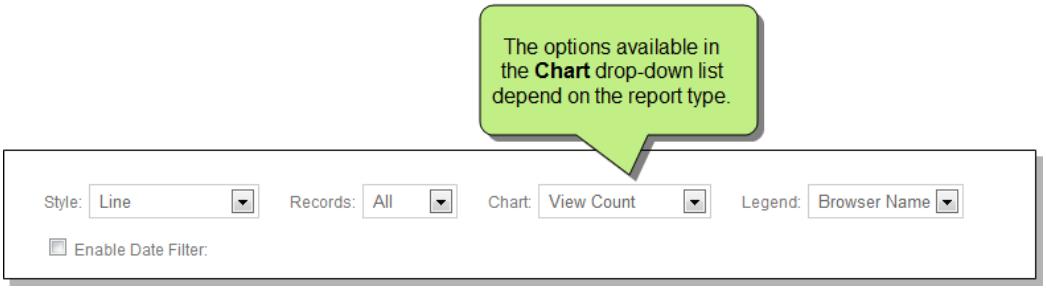


The table below describes the options in the drop-down list:

Records	Description
All	Includes all records in the report
Top 10	Includes only the top 10 records.
Top 25	Includes only the top 25 records.
Top 50	Includes only the top 50 records.

HOW TO SWITCH THE CHART VIEW

If the selected report supports the ability to filter the records that you include, select one of the listed options from the **Chart** drop-down list. The options available depend on the report type.



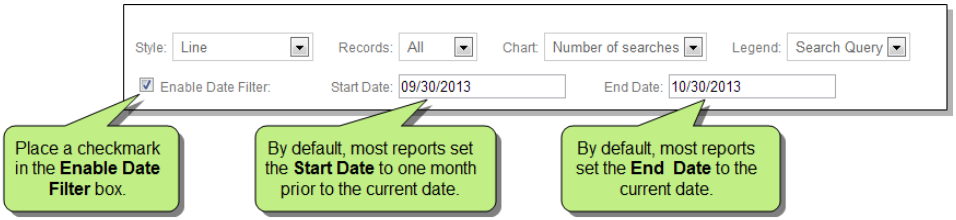
HOW TO SELECT THE REPORT LEGEND

If the selected report supports the ability to include a report legend, select one of the listed options from the **Legend** drop-down list. The options available depend on the data in the report.

HOW TO ENABLE THE DATE FILTER

If the selected report supports the ability to enable a data filter, do the following:

1. Place a check mark in the **Enable Date Filter** box. This reveals the **Start Date** and **End Date** fields.



Note: Most reports define the report period to the previous month by default.

2. Place the mouse cursor in the **Start Date** box to reveal a drop-down calendar where you can navigate to the desired start date. You can click the arrows to switch between months.
3. Repeat the same action in the **End Date** box.

HOW TO FORMAT A SYSTEM REPORT

For system reports, the chart style for the report is predetermined. However, you do have the ability to specify the desired reporting period as follows:

1. Open the desired system report. This reveals the Start Date and End Date fields.
2. Place the mouse cursor in the **Start Date** box to reveal a drop-down calendar where you can navigate to the desired start date. You can click the arrows to switch between months.
3. Repeat the same action in the **End Date** box.

4. When ready to generate the report, click **Run**.

HOW TO EXPORT A REPORT

You can download a copy of the current report to your local drive.

1. Run the desired report.
2. At the bottom of the page, click the **Export** link.

> **Note:** Community reports can be downloaded in CSV or TXT format. System reports can be downloaded in CSV format only.

Searching the Pulse Dashboard

This feature is available to members of the **Administrators** and **Employees** group.

You can search the Pulse dashboard for information and even follow searches.

Searching the Pulse Dashboard

You can search the entire Pulse system or a feed.

HOW TO SEARCH THE ENTIRE PULSE SYSTEM

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. In the top-right corner of the dashboard, type a search query and select one of the following menu options:
   - **Search for Posts with this Phrase** Limits the scope of the search to post activities.
   - **Search for Messages with this Phrase** Limits the scope of the search to messaging activities.

HOW TO SEARCH A FEED

1. In the Pulse dashboard, navigate to a system, user, or group feed.
2. In the feed, type a search query in the **Search this Feed** box.

Following Searches

If you are a member of the Administrators or Employees group, you can perform a search and then follow the results from the Pulse dashboard. See "Following Community Activities" on page 381.

Pulse Dashboard Frequently Asked Questions

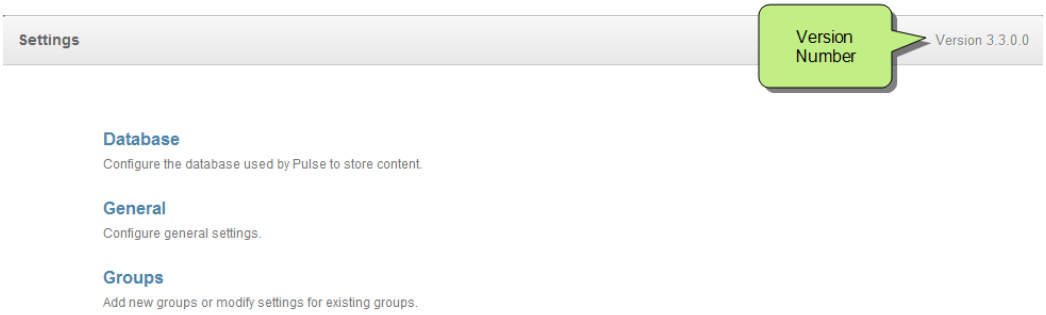
Following are some frequent questions about administration tasks for the Pulse dashboard.

General Settings

Following are general frequently asked questions about the dashboard.

WHAT VERSION NUMBER DO I HAVE?

1. Log in to the Pulse dashboard as an administrator.
2. Select **Administration>Settings**.The Pulse version number appears in the top right-corner of the page.



Managing Accounts

If you are a member of the Administrators group and responsible for Pulse user administration, here are some answers to frequently asked questions.

WHO CAN DISABLE OR DELETE USER ACCOUNTS?

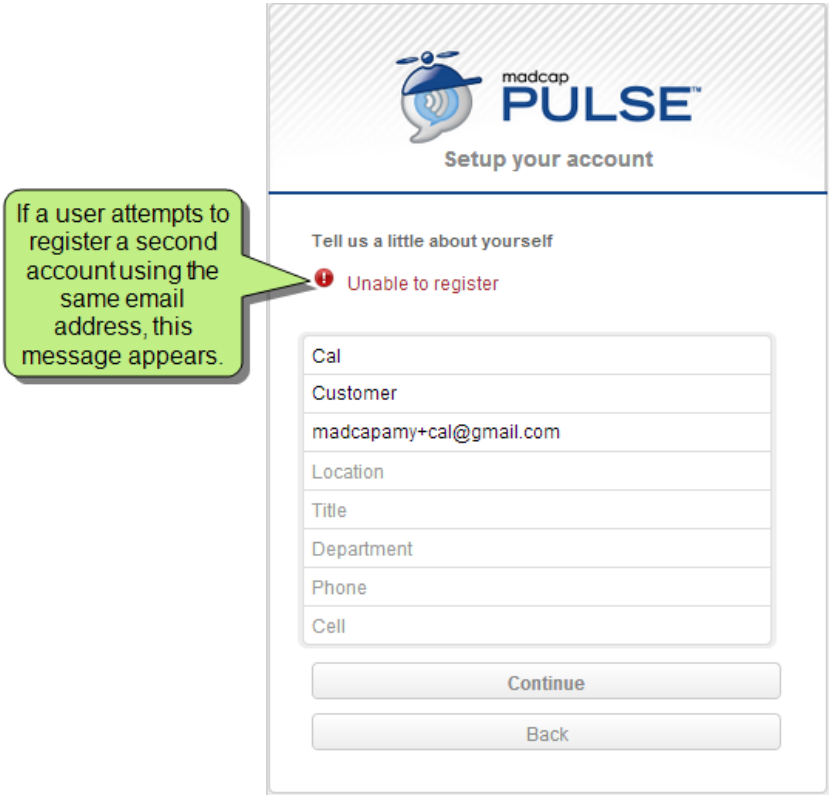
Pulse user accounts can be disabled or deleted by these individuals:

- **Pulse Administrators** Members of the Administrators group can disable to delete user accounts from the Administration>Settings menu. Members of the Employees and Customers groups cannot delete user account, including their own account.
- **SQL Server Administrator** If you have administrative permissions to SQL Server, you can remove user information directly from the SQL database. This will immediately remove a user from Pulse.

For more information about users, see "Managing Users" on page 243.

CAN USERS CREATE TWO ACCOUNTS WITH THE SAME EMAIL ADDRESS?

Pulse does not allow users to create two accounts with the same email address. If a user attempts to register for a second account using the same email address, they will see the "Unable to register" error shown below:



HOW CAN I REUSE AN EMAIL ADDRESS?

If you delete a user account in the Pulse dashboard, access to Pulse features is immediately revoked. However, to give a user the ability to re-use an email address in Pulse, you must also delete the user from the dbo.Users and dbo.Login tables in SQL Server. If you are using SQL Server Management Studio you can right-click the user and select **Delete** from the context menu. Once the entries are deleted, the email can be used to create a new Pulse account.

CHAPTER 4

User Tasks

As a user, there are many tasks that you can perform when using Pulse, from registering and logging in, to posting and sending messages, to moderating (if you have appropriate access).

This chapter discusses the following:

Registering for a Pulse Account 282
Logging In to Pulse 288
Editing Your Profile 293
Posting Content 297
Responding to Posts 310
Messaging 321
Moderating Pulse 330
Searching for Community Results 408

Registering for a Pulse Account

When you integrate a Pulse system with a Flare community, there are two methods for joining the community. Both methods require you to register and activate an account.

User Account Requirements

In order to register and activate a Pulse user account, you must have the following information:

- **An Email Address**
- **An Internet Connection and a Compatible Web Browser**
- **(Optional) A Pulse Invitation** You can register for Pulse with or without an invitation. However, some organizations might decided to send their users an invitation to join.

Registering for a Pulse Account

Use one of these methods to register for a Pulse account:

HOW TO REGISTER FROM AN INVITATION

If you are invited to join Pulse, you will receive an email to join the community from the Pulse system. The invitation is sent by a member of the Administrators group.

1. Check your email Inbox for the "You have been invited to Pulse" message.
2. Open the message. Then click the **Login** link in the body of the invite. This opens the Setup Your Account page in a web browser.
3. At the How Would You Like to Login dialog, do the following:
   a. Select the **With my e-mail address and a password** button.
   b. Type a unique password in the **Enter a Password** box. Your password must be a minimum of seven (7) characters.
   c. Click **Continue**.
4. In the Tell Us A Little About Yourself dialog, verify and enter the following information. An asterisk (*) denotes required fields:
   - ***First Name** The first name of the user.
   - ***Last Name** The last name of the user.
   - ***Email Address** A valid email address for the user.
   - **Location** A location for the user, such as La Jolla or New York City.
   - **Title** A title for the contact, such as a professional or job title.

- **Phone** A telephone number for the user.
- **Cell** A mobile phone number for the user.

5. At the Your Account is Ready dialog, click **Go to My Feed**.

   The Home page displays. Depending on the group membership of your user account, you will have different options available to you. See "Managing Groups" on page 234.

HOW TO REGISTER FROM THE PULSE DASHBOARD

1. In a web browser, navigate to the Site URL for the Pulse dashboard.

   Note: If you do not know the Site URL, see the Administrator who installed your Pulse server. Alternatively, if you have access to a Flare target that has already been integrated with the Pulse server, you can open the Community tab and find the URL listed there.

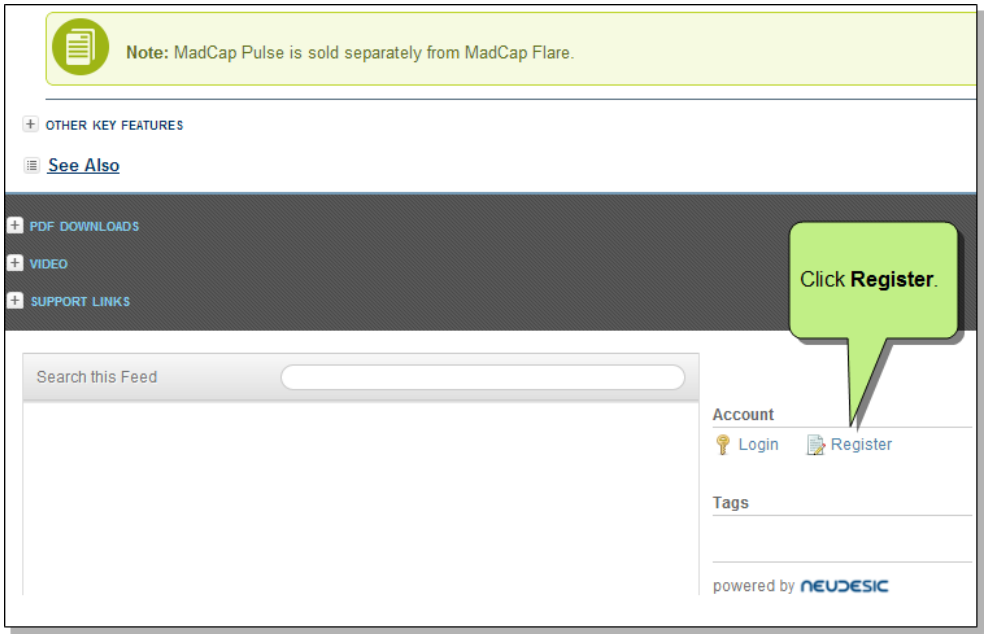
2. At the Pulse Account Login page, click **Register**.
3. In the Register page that appears, type the following information. An asterisk (*) denotes the required fields:
   - ***First Name** The first name of the user.
   - ***Last Name** The last name of the user.
   - ***Email Address** A valid email address for the user.
   - ***Password** This is the password for the user account. It must be a minimum of 7 characters in length.
   - ***Confirm Password** Re-enter the password.
   - **Title** A title for the contact, such as a professional or job title.
   - **Department** A department name for the user, such as Engineering or Sales.
   - **Location** A location for the user, such as La Jolla or New York City.
   - **Phone** A telephone number for the user.
   - **Cell** A mobile phone number for the user.
4. Click **Register**.The Validate Email Address page appears.

HOW TO REGISTER FROM THE FLARE OUTPUT

1. In a web browser, navigate to the Flare output (e.g., the MadCap Flare online Help can be found at **web-help.madcapsoftware.com**).

   Depending on the Pulse features that have been enabled for the output, you can click one of the following links:

   » **Register Link in the Embedded Discussion Form**



- **Register Link in the Community Tab** This tab is only available when it is enabled by the content developer. See "Integrating Flare and Pulse" on page 112.

2. In the Register page that appears, type the following information. An asterisk (*) denotes the required fields:
   - ***First Name** The first name of the user.
   - ***Last Name** The last name of the user.
   - ***Email Address** A valid email address for the user.
   - ***Password** This is the password for the user account. It must be a minimum of 7 characters in length.
   - ***Confirm Password** Re-enter the password.
   - **Title** A title for the contact, such as a professional or job title.
   - **Department** A department name for the user, such as Engineering or Sales.
   - **Location** A location for the user, such as La Jolla or New York City.
   - **Phone** A telephone number for the user.
   - **Cell** A mobile phone number for the user.
3. Click **Register**.The Validate Email Address page appears.

Activating Your Pulse Account

You also need to activate your account.

1. Register for a Pulse account.
2. When the Validate Email Address page appears, check your email Inbox for the "Pulse User Profile Activation" message and open it.
3. Click the **Complete Registration** link. This opens the Register - Activation Success page in a web browser.
4. In the Activation Success page, click **Close Window** to quit your browser.

Troubleshooting Registration Issues

If you are attempting to register for a Pulse account and encounter a message that says "A user name for that email address already exists," it may be possible that:

- You have already created a Pulse account and need a new password.
- You have already created a Pulse account and need to complete the registration process.
- Someone accidentally entered your email address when creating a Pulse account. However, since they entered your email address, the confirmation email was delivered to your email address and the person was never able to confirm that registration.

In any of these events, it is easy to reclaim your Pulse account.

HOW TO RECLAIM YOUR PULSE ACCOUNT

1. Go to the password recovery page. Depending on the interface, you can get there using these options:
   - **From the Online Documentation** Visit the Flare output files and under **Account**, click the **Login** link. In the Pulse Account Login page, click the **Forgot your password?** link.
   - **From the Pulse Server Admin Tool** Simply visit this link: **http://pulse.madcapsoftware.com/Pulse/ForgotPassword**
2. In the Forgot Your Password page, type your email address.
3. Click the **Send Instruction** button.
4. In the Email Sent dialog, click **Ok** to close the message that your password has been reset.
5. Open your email inbox and look for the "Reset your password" message.
6. Click the **Reset your password** link.
7. In the Reset Your Password page, type a unique password for your account in the **New Password** and **Confirm Password** boxes.

8. Click **Reset Password**.
9. If you password is successfully reset, a confirmation page appears. Click **Close Window**.

Logging In to Pulse

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

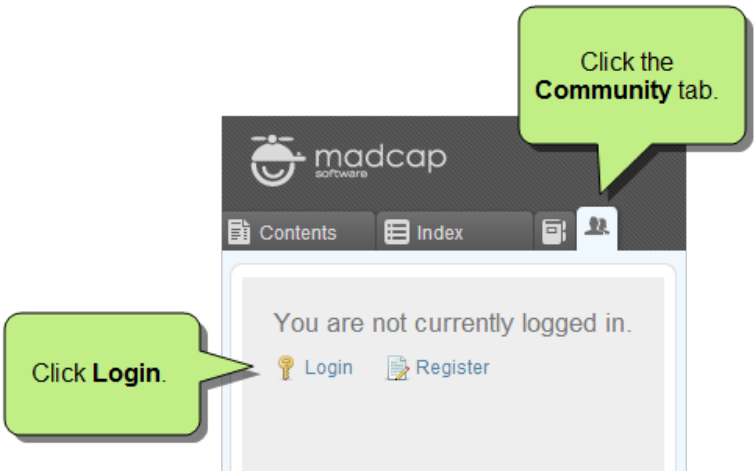
Once you have registered for a Pulse account, you can log in to the Pulse dashboard or you can log in to the published Flare output to use the community features.

Logging in to a Flare Community

There are several ways to log in to Pulse. The log in options available depend on the features that the Flare author enabled.

HOW TO LOG IN/OUT USING THE COMMUNITY TAB

1. In a web browser, go to the URL hosting the published Flare content (e.g., the MadCap Flare online Help can be found at **webhelp.madcapsoftware.com**).
2. Click the **Community** tab. Then, click **Login**.



Note: A content developer must enable the Community tab for the Flare output using a skin.

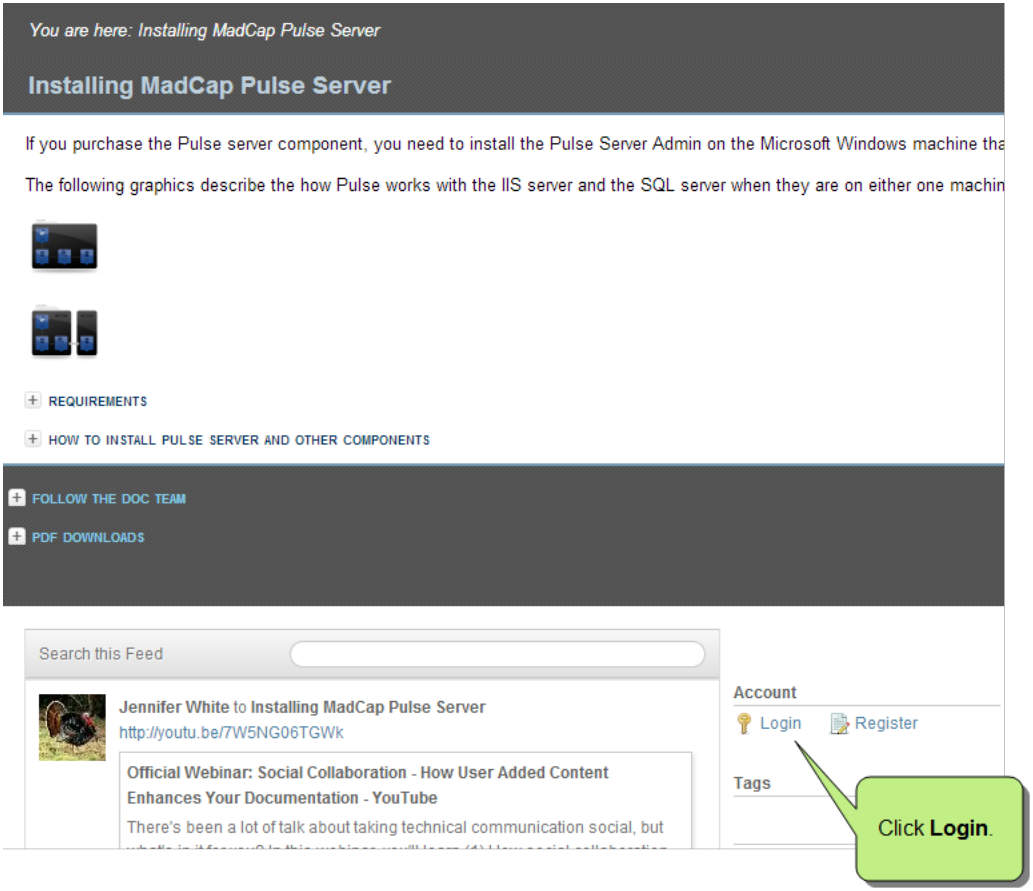
3. In the Pulse Account Login dialog, type the following information:
   - **Email Address** Type the email address that you used when registering for Pulse. Your email address is your username.
   - **Password** Type the password that you created for your account.
4. (Optional) Place a check mark in the **Keep me signed in** box.

   Note: When selected, Pulse will remember the account information that you used to log in and won't ask you to enter your credentials again as long as you are using the same browser on the same computer or device.

5. Click **Login**.

HOW TO LOG IN/OUT FROM A TOPIC FEED

1. In a web browser, go to the URL for your published online output (e.g., the MadCap Flare online Help can be found at **webhelp.madcapsoftware.com**).
2. In the **Account** area of a topic feed (i.e., the area at the bottom of any topic in the output), click **Login**.



The Pulse Account Login dialog opens.

3. In the Pulse Account Login dialog, type the following information:
   - **Email Address** Type the email address that you used when registering for Pulse. Your email address is your username.
   - **Password** Type the password that you created for your account.

> **Note:** If you do not have an account, you can register for one. See "Registering for a Pulse Account" on page 282.

4. (Optional) Place a check mark in the **Keep me signed in** box.

> **Note:** When selected, Pulse will remember the account information that you used to log in and won't ask you to enter your credentials again as long as you are using the same browser on the same computer or device.

5. Click **Login**.

Logging in to the Pulse Dashboard

HOW TO LOG IN TO THE PULSE DASHBOARD

1. In a web browser, go to the Site URL for your Pulse server.

   > **Note:** If you do not know the Site URL, see the Administrator who installed your Pulse server. Alternatively, if you have access to a Flare target that has already been integrated with the Pulse server, you can open the Community tab and find the URL listed there.

   This opens the Pulse Account Login dialog.

2. In the Pulse Account Login dialog, type the following information:
   - **Email Address** Type the email address that you used when registering for Pulse. Your email address is always your username.
   - **Password** Type the password that you created for that email address.
3. (Optional) Place a check mark in the **Keep me signed in** box. When selected, Pulse will remember the account information that you used to log in and won't ask you to enter your credentials again as long as you are using the same browser on the same computer or device.
4. Click **Login**.

Troubleshooting Login Issues

Below are resolutions to issues that users might encounter when attempting to log in to Pulse.

IF YOU HAVE NOT BEEN GIVEN ACCESS TO PULSE

If you attempt to log in to Pulse and see the "You have not been given access to Pulse" message, your account has likely been disabled by a Pulse administrator. You should contact the administrator for assistance.

IF YOU HAVE AN INVALID USER NAME OR PASSWORD

If you attempt to log in to Pulse and see the "Invalid User Name or Password" message, you may have entered your email address or password incorrectly. Enter the correct email address and password and try again.

Editing Your Profile

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

When you register for an account, a profile is created for you in the Pulse system. See "Registering for a Pulse Account" on page 282.

Registered Pulse users can edit their account profile by changing their personal information, uploading a profile images, and specifying notification settings.

Editing Profile Settings

Use the following steps to edit profile settings.

HOW TO EDIT YOUR PROFILE

1. Log into the Flare output using a registered Pulse account.
2. Open the Settings page using one of these options:
   - Select the **Community** tab. Then click **Edit My Profile**.

   - In the topic toolbar, click .

3. In the Settings page, update the following information. An asterisk (*) denotes a required field.
   - ***First Name** The first name of the user.
   - ***Last Name** The last name of the user.
   - ***Email Address** A valid email address for the user.
   - **Title** A title for the contact, such as a professional or job title.
   - **Department** A department name for the user, such as Engineering or Sales.
   - **Location** A location for the user, such as La Jolla or New York City.
   - **Cell** A mobile phone number for the user.
   - **Phone** A telephone number for the user.
4. Click **Save**.

Changing Your Profile Image

Use the following steps to change your profile image.

HOW TO CHANGE YOUR PROFILE IMAGE

1. In the Settings page, click **Change Image**.
2. In the dialog for your computer's operating system, navigate to the image that you want to upload. This uploads your image and it appears in the Crop Your Image dialog.
3. Adjust the boundaries of the crop top. Then click **Crop and Save**.

Signing Up for Notifications

Use the following steps to sign up for notifications.

HOW TO SIGN UP FOR NOTIFICATIONS

1. In the Settings page, select the **Notifications** tab.

   The table below describes the different notifications you can received from Pulse.

Notification Types	Description
Send me email	Sends you email when events related to you occur.
Answers	Notifies you when people post answers to your questions.
Comments	Notifies you when people comment on your posts.
Likes	Notifies you when people like your posts.
Follows	Notifies you when people follow you.
Updates	Notifies you when people post updates on your feed.
Mentions	Notifies you when people mention you in their posts.
Asks	Notifies you when people ask you a question.
Invites	Notifies you when people invite you to join Pulse system feeds.
Daily Digest	Send you one daily digest email containing all account-related Pulse activity.
Tasks	Notifies you when users assign you a task.
Messages	Notifies you when people send you are direct message while you are not actively using Pulse.

2. Select from these options:
   - **Sign-up for a Notification** Place a check mark in the desired box.
   - **Opt-out of a Notification** Clear the check mark from the desired box .
3. Click **Save**.

Posting Content

Users can post content in a variety of ways, such as status updates, questions, articles, and tasks.

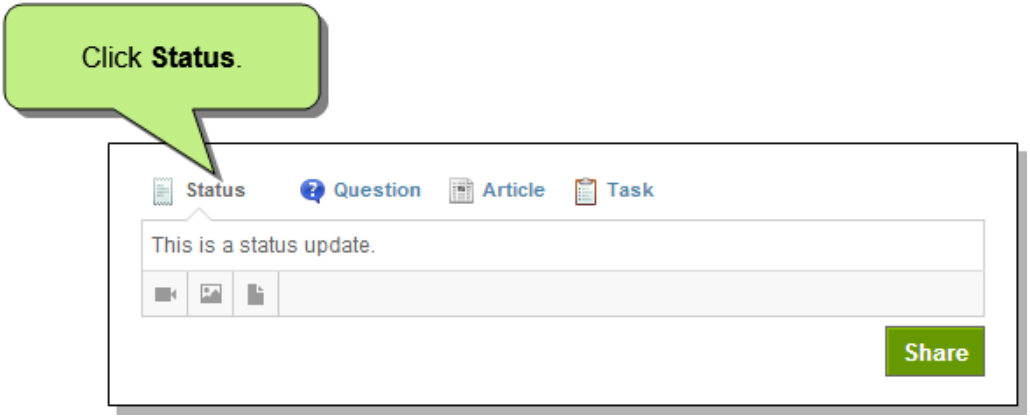
Posting Status Updates

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can post status updates in the feeds associated with a Pulse system. The most common place for an end user to post a status update is in a topic (i.e., the embedded discussion form that appears under each topic in the Flare output). However, you can also post status updates in any group, tag, or user feed that you have access permission to view.

HOW TO POST STATUS UPDATES

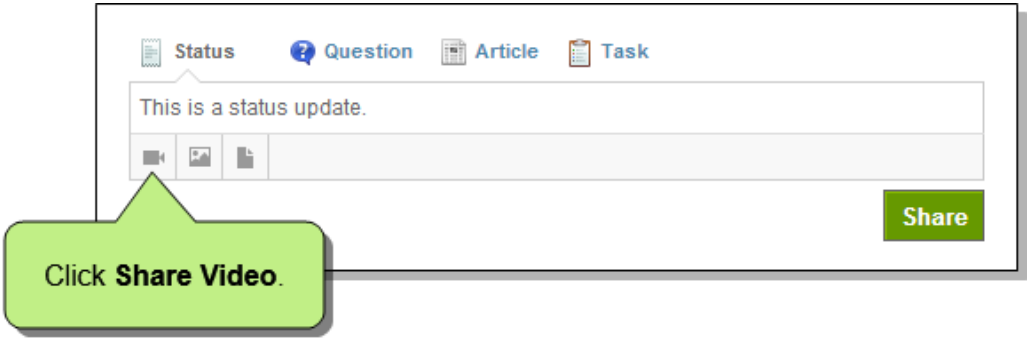
1. Log into the Flare output using a registered Pulse account.
2. Navigate to any Flare topic that has been mapped by a content developer to a Pulse feed. See "Integrating Flare and Pulse" on page 112.
3. In the embedded discussion form below the topic, click **Status**.



4. (Optional) Do any of the following if you would like to share a video, image, or file with your status update:

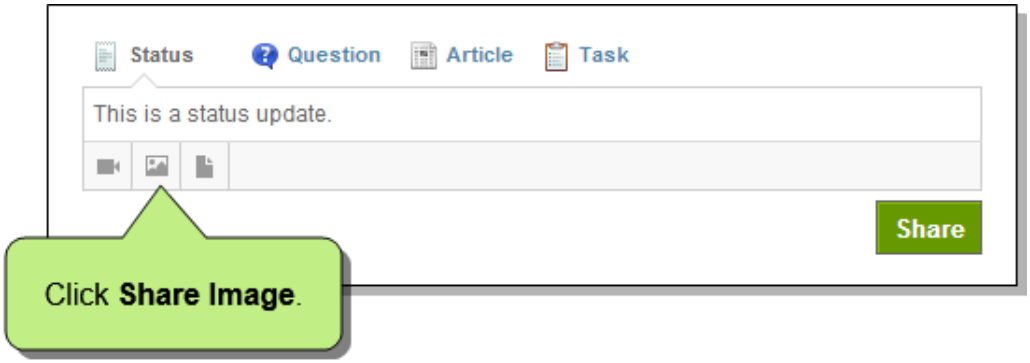
HOW TO SHARE A VIDEO

Click **Share Video**. Then select a video to upload.



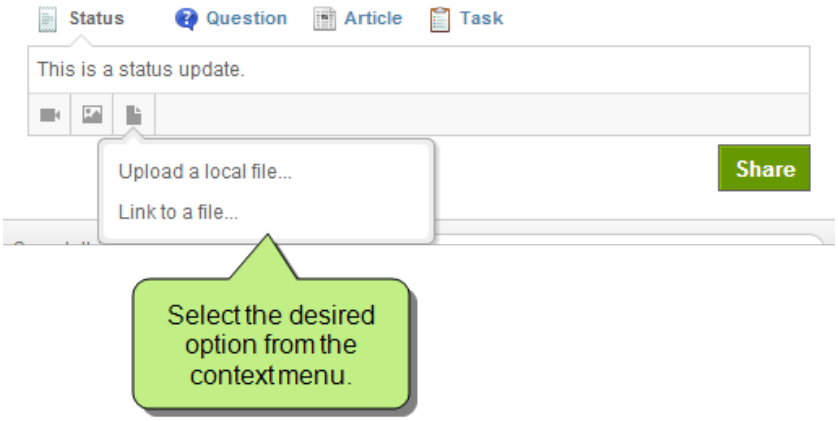
HOW TO SHARE AN IMAGE

Click **Share Image**. Then select an image to upload.



HOW TO SHARE A FILE—UPLOAD OR LINK

Click **Share File**. Then select **Upload a local file** or **Link to a file** from the context menu.



5. Type your status update. You can also enter the sign @ and begin typing to mention a document, people, or groups. See "Mentioning Documents, People, and Groups" on page 319.

6. When finished typing your update, you can click **Share**.

If you are responsible for moderating the Pulse feeds that are mapped to your Flare community or if you are just interested in participating in a discussion, you have several options for responding to a status update. See "Responding to Status Updates" on page 391.

Posting Questions

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can post questions in a Pulse feed and vote on answers. The most common place for end users to ask questions is in a topic feed (i.e., the embedded discussion form that appears under each topic in the Flare output). However, you can also post questions in any group, tag, or user feed that you have access permission to view.

Posting a Question

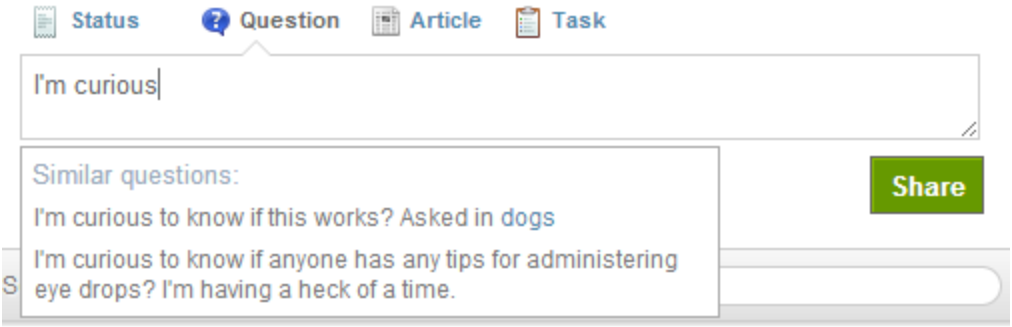
Use the following steps to post a question.

HOW TO POST A QUESTION

1. Log into the Flare output using a registered Pulse account.
2. Navigate to any Flare topic that has been mapped by a content developer to a Pulse feed. "Integrating Flare and Pulse" on page 112.
3. In the embedded discussion form below the topic, click **Question**.

4. In the text field, type your question.

If you are a member of the Administrators or Employees group, a drop-down list will present any similar questions in the Pulse system.



5. Click **Share**. Your question is posted to the feed for the current topic.

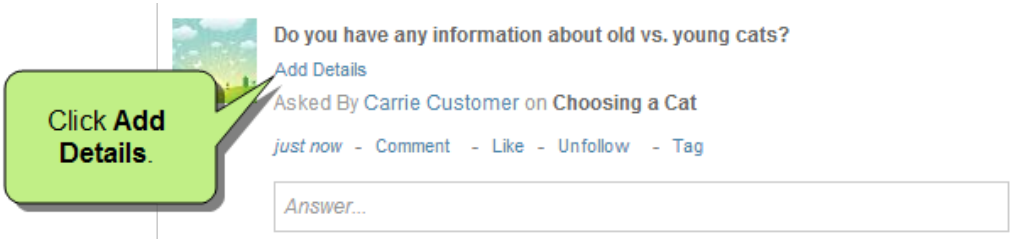
Adding Details to a Question

Use the following steps to add details to a question.

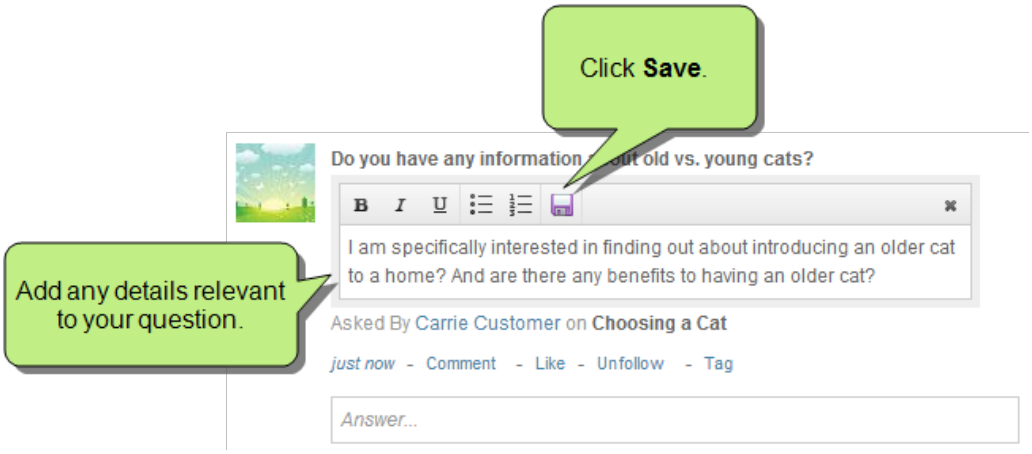
HOW TO ADD DETAILS TO A QUESTION

After you post a question, you have the option of adding details to the question. This is useful when you want to elaborate on your question.

1. After posting a question, click **Add Details**.



2. In the text editor that appears, add any relevant details. Then click the **Save** button in the toolbar.



This posts the details below the question. You will not be able to add further details.

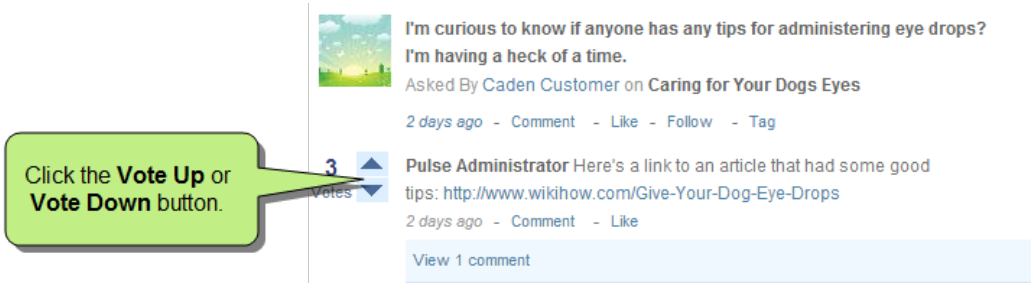
Voting for Answers

Use the following steps to vote for answers.

HOW TO VOTE FOR ANSWERS

Registered users can vote on answers. Over time, the users with the most votes become experts.

1. Log into the Flare output or Pulse dashboard using a registered Pulse account.
2. Go to the desired question in any feed.
3. On the left-side of an answer, click the **Vote Up** or **Vote Down** button.



The answer with the most votes moves higher in the answer list.

> **Note:** If you are a member of the Administrators or Employees group, votes work with the Find Experts feature. See "Finding Experts" on page 379.

If you are responsible for moderating the Pulse feeds that are mapped to your Flare community or if you are just interested in participating in a discussion, you have several options for responding to a question. "Responding to Questions" on page 392.

Posting Articles

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can create and post articles in the topic feeds associated with a Pulse system. The most common place for end users to create articles is in a topic feed (i.e., the embedded discussion form that appears under each topic in the Flare output). However, you can also post articles in any group, tag, or user feed that you have access permission to view.

HOW TO POST AN ARTICLE

1. Log into the Flare output using a registered Pulse account.
2. Navigate to any Flare topic that has been mapped by a content developer to a Pulse feed.See "Integrating Flare and Pulse" on page 112.
3. In the topic feed, click **Article**. A text editor opens.

4. In the text editor, do the following:
   - **Title** Type a title for the article in the space provided. You not have the ability to change the title of the article after you post it.
   - **Body** Type and format the body of your article. You can apply basic formatting for emphasis, such as bold, italics, and underline. You can also create ordered and numbered lists.
5. Click **Share**. The article is posted to the active feed.

If you are responsible for moderating the Pulse feeds that are mapped to your Flare community or if you are just interested in participating in a discussion, you have several options for responding to an article. "Responding to Articles" on page 397.

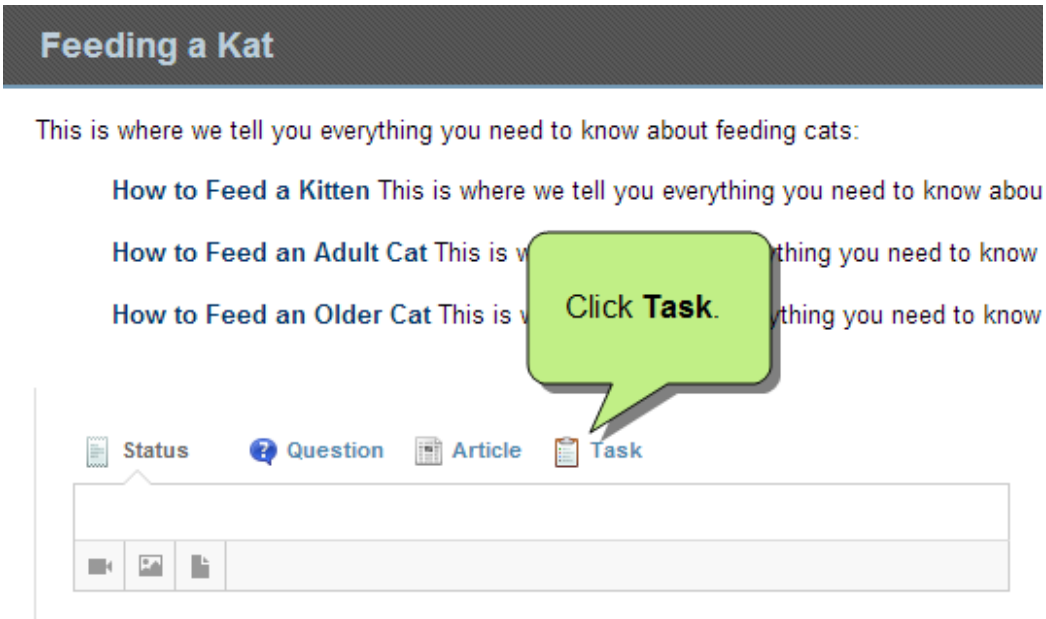
Assigning Tasks

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can create, assign, and manage tasks with Pulse. This gives members of the Customers group the ability to assign a task to any other registered user. It also gives members of the Administrators and Employees groups the ability to assign tasks to each other in any topic, group, tag, and user feed that you have access permission to view.

HOW TO CREATE AND ASSIGN TASKS

1. Log into the Flare output using a registered Pulse account.
2. In the embedded discussion form, click **Task**.



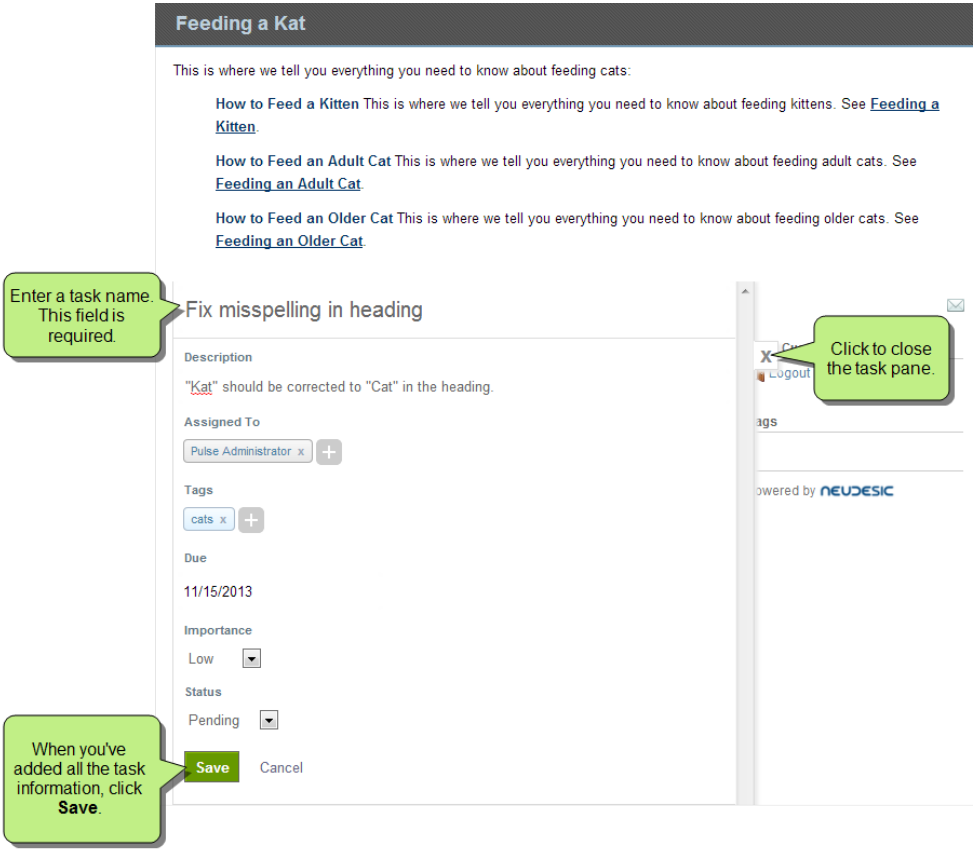
The task pane opens.

3. In the task pane, complete the following fields. An asterisk (*) denotes a required field:
   - ***Enter a name** Type a name for the task.
   - **Enter a description** Type a description of the task.
   - **Assigned To** Assign the task to one or more Pulse users.

     Note: Members of the Administrators and Employees group cannot assign tasks to members of the Customers group.

     Note: Members of the Customers group can assign tasks to any registered user from the Flare output. However, only members of the Administrators and Employees group are permitted to manage tasks. See "Tasks" on page 369.
   - **Tags** Create a new tag or assign an existing tag to a post.
   - **Due** Set an optional due date for the task.
   - **Importance** Set the priority for the task.

» **Status** Set the status of the task.



4. When you are satisfied with the task, click **Save**. This closes the task pane.

   The system sends a notification to the assigned user(s). When a task is assigned to you, you have the option to accept or decline it. See "Tasks" on page 369.

Responding to Posts

Users can respond to posts in a variety of ways, such as adding comments; following, liking, and tagging posts; and mentioning documents, people, and groups.

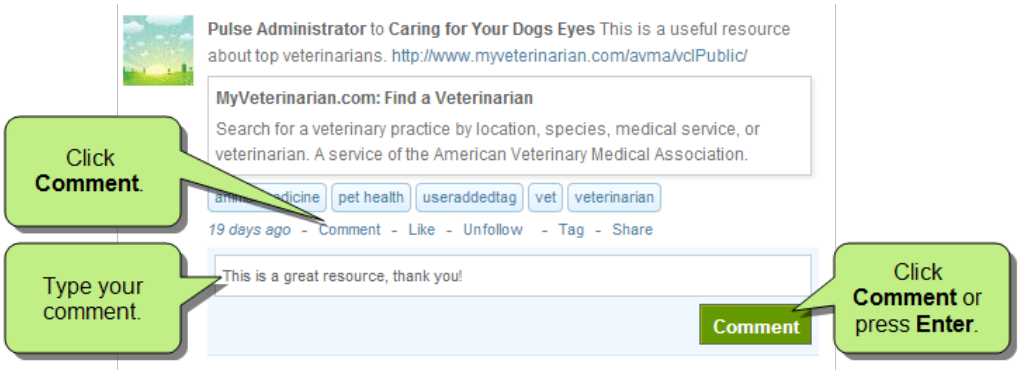
Adding Comments

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can add comments to the posts (i.e., status updates, questions, articles, and tasks) that people add in Pulse. You can add comments to posts that appear in any topic, group, tag, and user feed that you have access permission to view.

HOW TO ADD COMMENTS

1. Log into the Flare output using a registered Pulse account.
2. Locate the post where you want to add a comment. You can add comments to status updates, questions, articles, and tasks.
3. Click the **Comment** link. Then type your comment in the space provided.
4. Click the **Comment** button or press **Enter** to post your response.



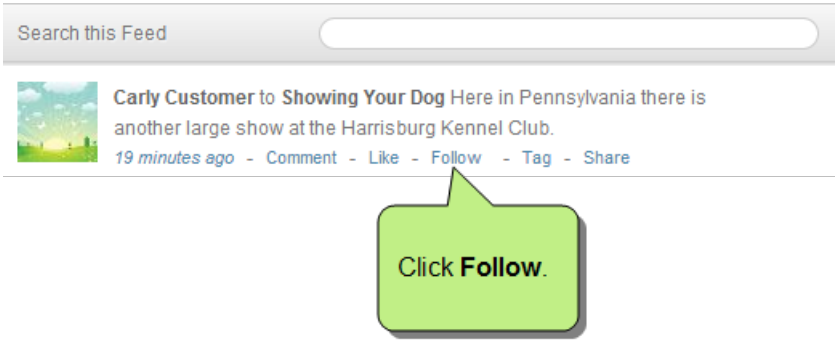
Following Posts

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users have the ability to follow a post. In Pulse, a post is a status update, question, article, or task. You can follow posts that appear in any topic, group, tag, and user feed that you have access permission to view.

HOW TO FOLLOW A POST

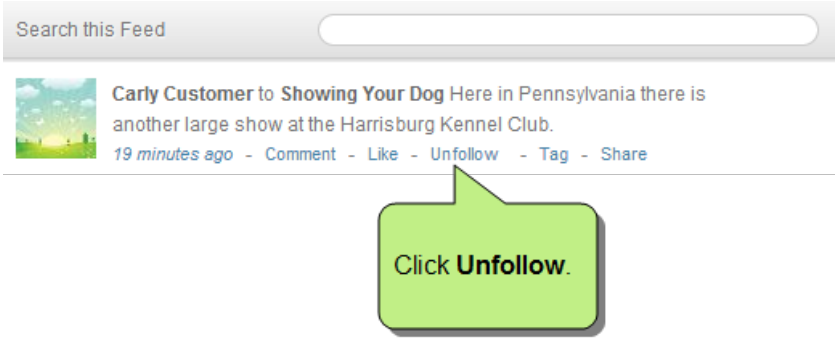
1. In the Pulse dashboard or Flare output, navigate to the desired post.
2. Immediately below the post, click **Follow**.



Pulse begins notifying you about any activities relating to that post, such as new comments, likes, follows, tags, and shares. See "Notifications" on page 324.

HOW TO UNFOLLOW A POST

1. In the Pulse dashboard or Flare output, navigate to the desired post.
2. Immediately below the post you are following, click **Unfollow**.



Pulse stops notifying you about any activities relating to that post, such as new comments, likes, follows, tags, and shares. See "Notifications" on page 324.

Note: If you are a member of the Administrators or Employees group, you have other options for following community activity. See "Following Community Activities" on page 381.

Liking and Unliking Activity

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can like and unlike posts, just as you do with social media tools. You can like (and subsequently unlike) posts that appear in any topic, group, tag, and user feed that you have access permission to view.

HOW TO LIKE AND UNLIKE A POST

To like a post, click **Like**.

To unlike a post, click **Unlike**.

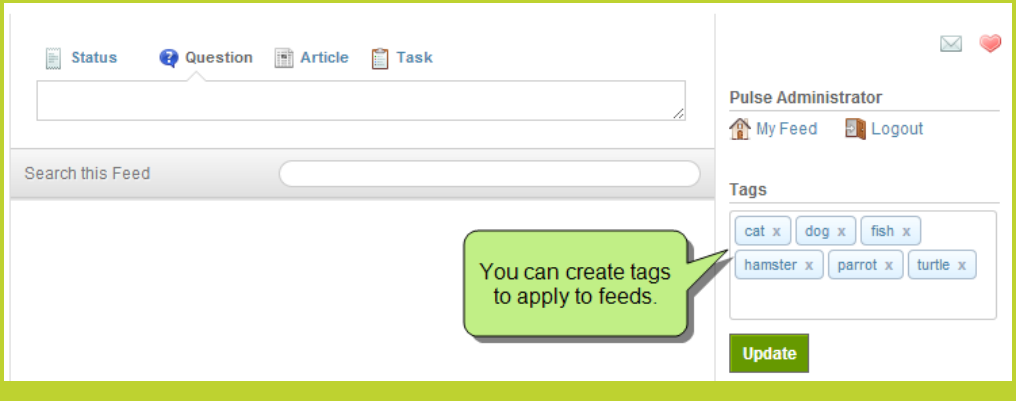
Tagging Posts

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

Tags are simple keywords and short phrases that describe what a piece of online content is about. In Pulse, tags are used as a means for categorizing Pulse feeds and Flare posts. Because tags can be informally created and applied to a variety of Pulse content (e.g., status updates, questions, articles, tasks, images, and videos), they are a particularly useful to members of the Administrators and Employees groups, as they help moderators better organize and find information. All registered users can add tags to posts that appear in any topic, group, tag, and user feed that you have access permission to view.

E X A M P L E

Let's say you are a member of the Administrators or Employees group and publishing Flare output for a project titled "Pets." You might want to create a different tag for each animal you've written a Flare topic about. For example, you might create tags for: cat, dog, fish, hamster, parrot, and turtle. You can then apply these tags to the embedded discussion form in Pulse.



Let's say you are a member of the Customers group and when reading another user's post, you decide you want to apply the existing tag (e.g., "dog") to a post. However, you also want to create two new tags. For example, you might create tags for dog breed and dog breed selector.

What are some other things to keep in mind when selecting a breed?

Lifestyle?

Activity level?

Average life span?

Asked By Caden Customer to Choosing a Dog

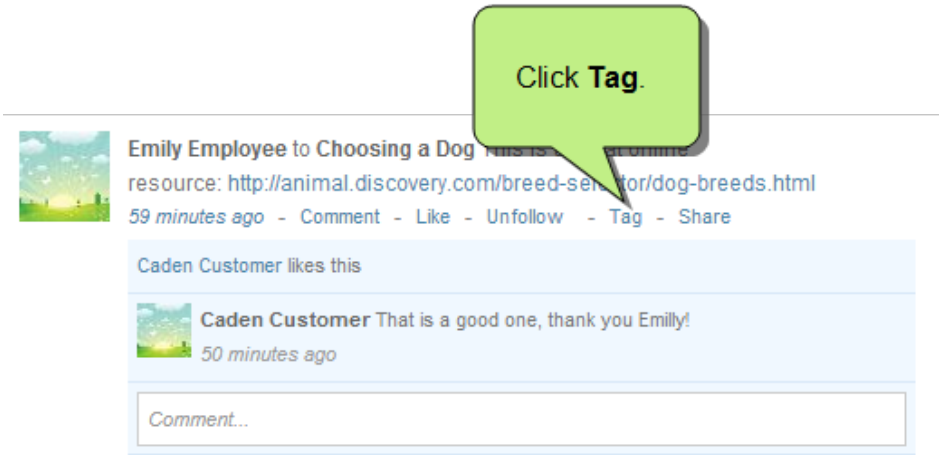
dog | dog breed | dog breed selector

30 minutes ago - Comment - Like - Follow - Tag - Share - Ask

Answer...

HOW TO CREATE TAGS AND TAG CONTENT

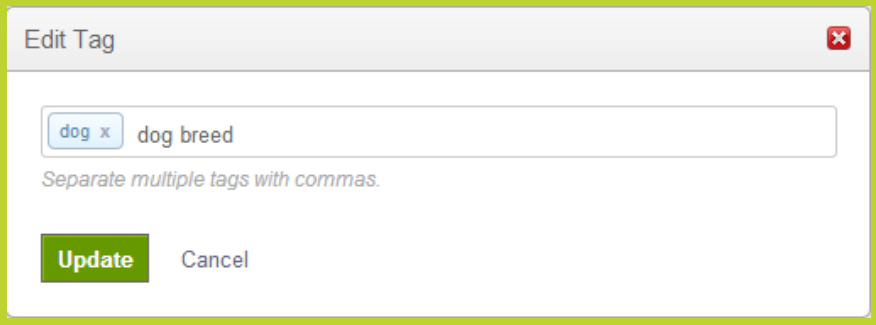
1. Log into the Flare output using a registered Pulse account.
2. Locate a post in one of the topic feeds. In this example, we will show you how to add a tag to a status update. However, registered users can add tags to questions, articles, tasks, images, and videos.
3. Immediately below the post, click the **Tag** link.



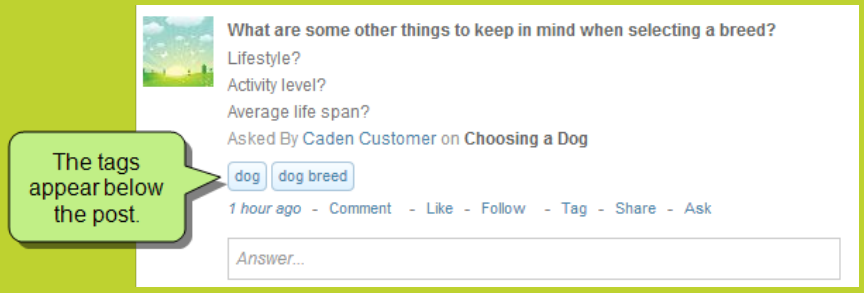
4. In the Edit Tag dialog, you have these options:
   - **Create a New Tag** Type a simple keyword or short phrase. Unlike some tagging utilities, when a single tag consists of more than one word, you do not need to separate the words with an underscore (i.e., if you want to add a tag named "dog breed," simply type `dog breed` instead of `dog_breed`). However, if you are adding more than one tag, you must separate each tag with a comma. Then click **Update**.

E X A M P L E

Let's say you want to add the tags "dog" and "dog breed" to a post. Below shows you how your tags would appear in the Edit Tag dialog before clicking **Update**.



After clicking **Update**, the tags that you created appear below the post.



OR

» **Add an Existing Tag** Begin typing a simple keyword or short phrase. Then select a match from the list that appears, and click **Update**.

E X A M P L E

Let's say you want to apply a tag that already exists to the post. Below shows you how a list of existing tags appears so you can select a match.

Note: If you are a member of the Administrators or Employees groups, you have additional options available to you when working with tags from the Flare content and Pulse dashboard. See "Using the Tags Menu" on page 197.

Note: This feature also works with the Find Experts feature. See "Finding Experts" on page 379.

Mentioning Documents, People, and Groups

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can use the Mentions feature to mention other registered users by name in status updates, questions, articles, and comments. If users have added documents or groups to Pulse, you can also insert mentions to those items.

Like many popular social media sites, this feature lets you type the @ sign and then start typing the name of a document, person, or group to insert a mention. This is a useful tool for building social relationships. It lets you express interest in others by highlighting a user in conversation. Its also a great way to highlight a document, thank a group for their contribution, or just say congratulations on a job well done.

HOW TO MENTION DOCUMENTS, PEOPLE, AND GROUPS

1. Log into the Flare output or Pulse dashboard using a registered Pulse account.
2. Navigate to the desired Pulse feed.
3. Type a status update, question, or comment. When you want to mention another registered user, enter the @ sign and begin typing a name. A drop-down list reveals any matching documents, people, or groups.

4. Begin typing letters that match the user you want to mention. When a match is found, click the match in the drop-down list.
5. Finish typing your content and click **Share**. The content is posted and Pulse sends the people mentioned a notification.

People
Groups
Status
Questio
Article
Task
Special thanks to Al Administrator and a shout out of appreciation to the Cats group for all of their amazing contributions this quarter. This new document NutritionInCats.pdf is so informative!
Share
Documents

Messaging

Users can take advantage of messaging in a variety of ways, such as general messaging tasks, checking notifications, and sending chat messages.

Messaging Tasks

> This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

The Messages app gives you the ability to read, send, and hide conversations with other Pulse users. You must access the Messages app from the Pulse dashboard. Messages are not accessible from the Flare output.

Sending a New Message

Use the following steps to send a new message.

HOW TO SEND A NEW MESSAGE

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse>Messages**.
   - In the top-right corner of the page, click the button.
3. In the Messages page, click **New Message**.
4. In the New Message dialog, do the following:
   - **To** Start typing the name of a registered user and then select the appropriate match from the list.
   - **Message** Type the body of your message in the space provided.
   - **Add Attachment** Click to add a file attachment.
5. Click **Send**.

Viewing Messages

Use the following steps to view your messages.

HOW TO VIEW YOUR MESSAGES

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse>Messages**.
   - In the top-right corner of the page, click the button.
3. In the Messages page, your most recent messages and conversations appear in the list.
4. Click a message to open the conversation thread.

Loading Earlier Messages

Use the following steps to load earlier messages.

HOW TO LOAD EARLIER MESSAGES

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse>Messages**.
   - In the top-right corner of the page, click the button.
3. In the Messages page, your most recent messages and conversations appear in the list.
4. Click a message to open the conversation thread.
5. Click the **Load earlier messages** link.

Replying to Messages

Use the following steps to reply to a message.

HOW TO REPLY TO A MESSAGE

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse>Messages**.
   - In the top-right corner of the page, click the button.
3. In the Messages page, click one of your messages. This opens the message or conversation.
4. In the space provided, type your reply.
5. If you want to add an attachment, click **Add Attachment**. Then select the file to attach.
6. Click **Reply**.

Downloading Message Attachments

Use the following steps to download a message attachment.

HOW TO DOWNLOAD A MESSAGE ATTACHMENT

1. Log in to the Pulse dashboard.
2. In the Pulse dashboard choose one of these options:
   - From the menu bar, select **Pulse>Messages**.
   - In the top-right corner of the page, click the button.
3. In the Messages page, your most recent messages and conversations appear in the list.
4. Click a message to open the conversation thread.
5. Click the desired attachment to download it to your computer.

Note: If you do not know how to access the Pulse dashboard, see the Pulse Server Administrator for the Site URL. See "Pulse Server Configuration" on page 89.

Notifications

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

Do you want to receive notifications when a Pulse users posts an answer to one of your questions? Or be notified when someone asks a question about a particular Flare topic? Pulse provides users with a convenient way to sign up to receive email notifications about different system events and activities.

Notification Types

Pulse provides users with these notification types:

- **Comments** Notifies you when people comment on your posts. See "Responding to Status Updates" on page 391.
- **Answers** Notifies you when people post answers to your questions. See "Posting Questions" on page 301 and "Responding to Status Updates" on page 391.
- **Mentions** Notifies you when people mention you in their posts. See "Mentioning Documents, People, and Groups" on page 319.
- **Invites** Notifies you when people invite you to join Pulse system feeds. To learn how to send invites to users, see "Inviting People" on page 385.
- **Tasks** Notifies you when you are assigned a task to complete. See "Assigning Tasks" on page 307.

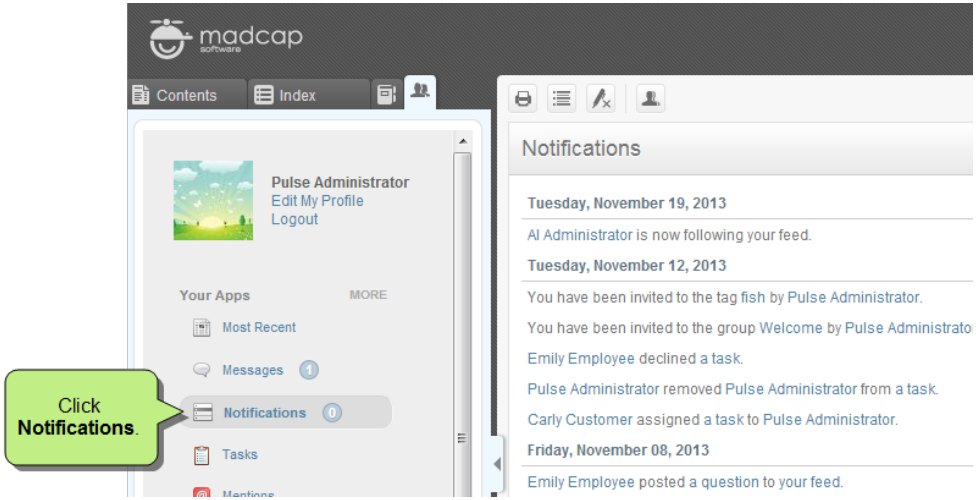
Checking Notifications

Pulse allows you to check your notifications.

HOW TO CHECK YOUR NOTIFICATIONS

1. Open the Notifications app using one of these options:

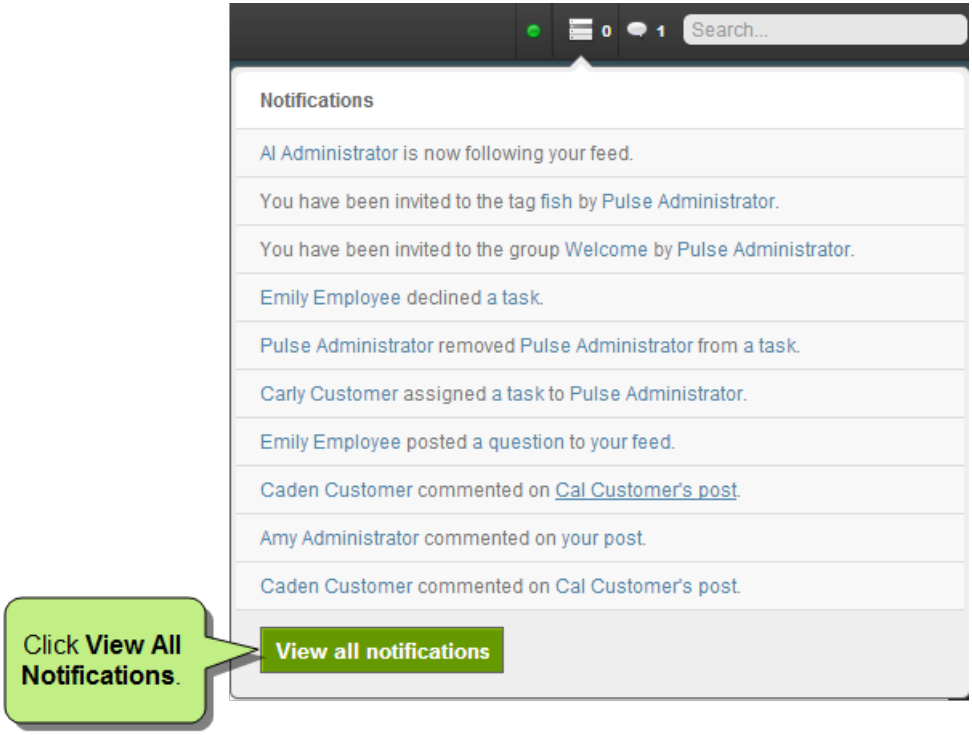
   » **Flare Output** In a web browser, navigate to the Flare output. Then log in to the Pulse system (see "Logging In to Pulse" on page 288). Click the **Community** tab in the Flare output. Under the Your Apps list, click **Notifications**.



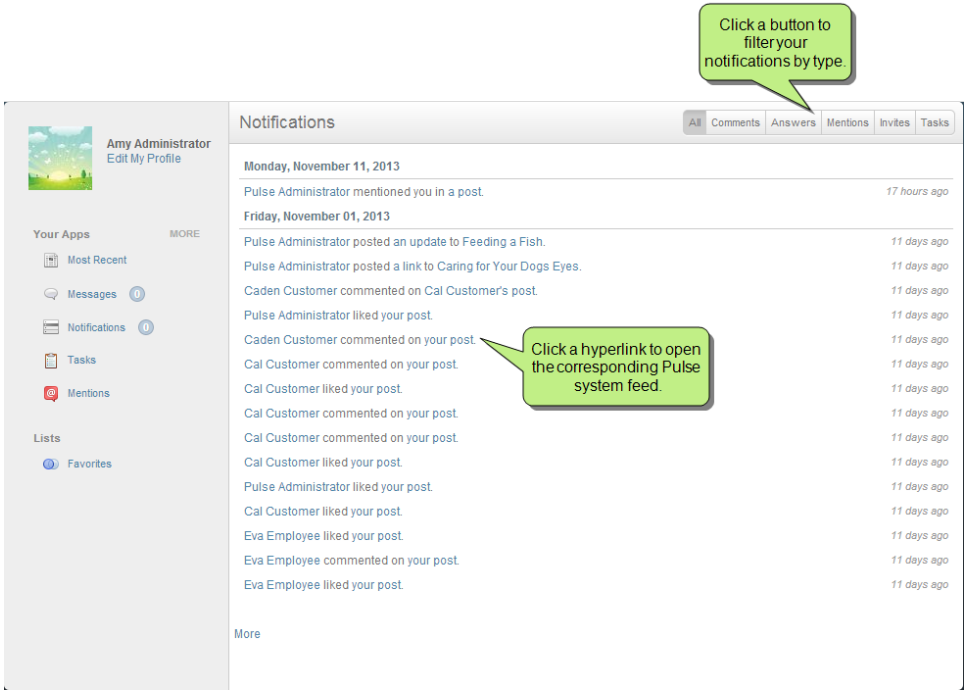
Note: The Your Apps list in the only available to members of the Administrators and Employees groups. It is not available to members of the Customers group.

Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

» **Pulse Dashboard** Log in to the Pulse dashboard (see "Logging In to Pulse" on page 288). Then click in the upper-right corner of the dashboard. In the drop-down message, click **View All Notifications**.



2. In the Notifications page, all of your notifications are listed. You have these options:
   - Click one of the hyperlinks in the notifications page to open the corresponding Pulse feed.
   - Click one of the buttons in the upper-right corner of the page for filter you notifications by type.



Signing Up for Email Notifications

When Pulse issues a notification, it appears in the Notifications app. If you would like Pulse to send you an email message as well, enable the appropriate setting in the Notifications tab on the Settings page of your profile. See "Editing Your Profile" on page 293.

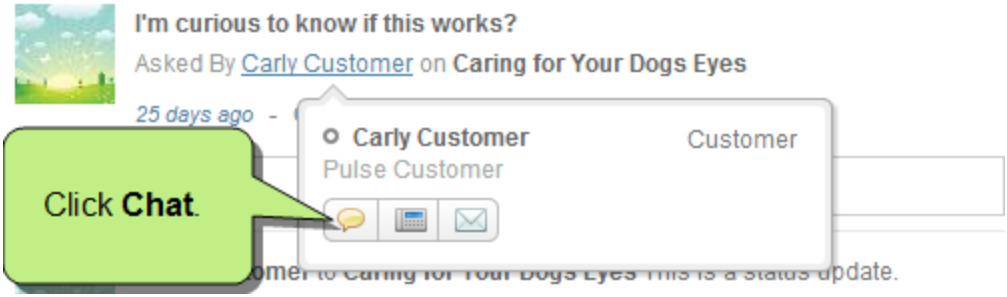
Sending Chat Messages

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

Chat features are available to all registered Pulse users. You can initiate a chat if you are a member of the Customers group. Members of the Administrators and Employees group have additional chat options. See "Contacting Registered Users" on the next page.

HOW TO INITIATE A CHAT SESSION

1. Log in to Pulse.
2. Hover the mouse cursor over a username.
3. When the popup menu appears, click the **Chat** button.



This reveals the Conversation with Customer Name window, where you can enter your message and attach a document. If the user is not online, Pulse will notify the recipient.

Moderating Pulse

If you are a member of the Administrators or Employees group, there are two user interfaces for moderating the activity in your Pulse system. You can use the Flare output or the Pulsedashboard to moderate activity in a variety of ways.

Contacting Registered Users

This feature is available to members of the **Administrators** and **Employees** group.

Using the Pulse dashboard, members of the Administrators and Employees group can contact other registered users using the chat and messaging features.

Using a Pulse Chat

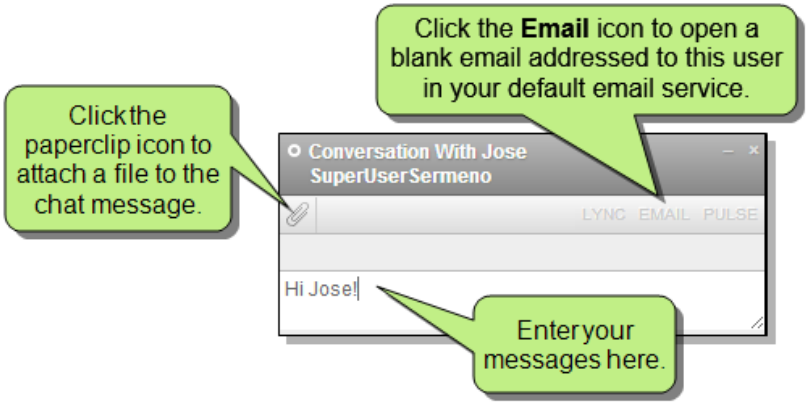
Pulse offers members of the Administrators and Employees group a chat feature where you can initiate a conversation with any registered user. You can also send chat messages using the same method available to members of the Customers group. See "Sending Chat Messages" on the previous page.

HOW TO USE PULSE CHAT

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **People>Find People**.
3. In the Find People page, click the desired user name.
4. In the user's page, click . This opens a chat window in the lower, right-hand corner of your browser.
5. Enter a message text in the space provided. Then press **Enter** to send the conversation.

   Note: If the user is not online, your conversation will appear in their Pulse inbox on their Messages page. See "Using the Pulse Menu" on page 176.

6. Click the paperclip link to add an attachment.



Sending a Message

Registered users can create and send messages to other registered users. To learn about more of the messaging features, see "Using the Pulse Menu" on page 176.

HOW TO SEND A MESSAGE

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse>Messages**.
   - In the top-right corner of the page, click the button.
3. In the Messages page, click **New Message**.
4. In the New Message dialog, do the following:
   - **To** Start typing the name of a registered user and then select the appropriate match from the list.
   - **Message** Type the body of your message in the space provided.
   - **Add Attachment** Click to add a file attachment.
5. Click **Send**.

Replying to a Message

Use the following steps to reply to a message.

HOW TO REPLY TO A MESSAGE

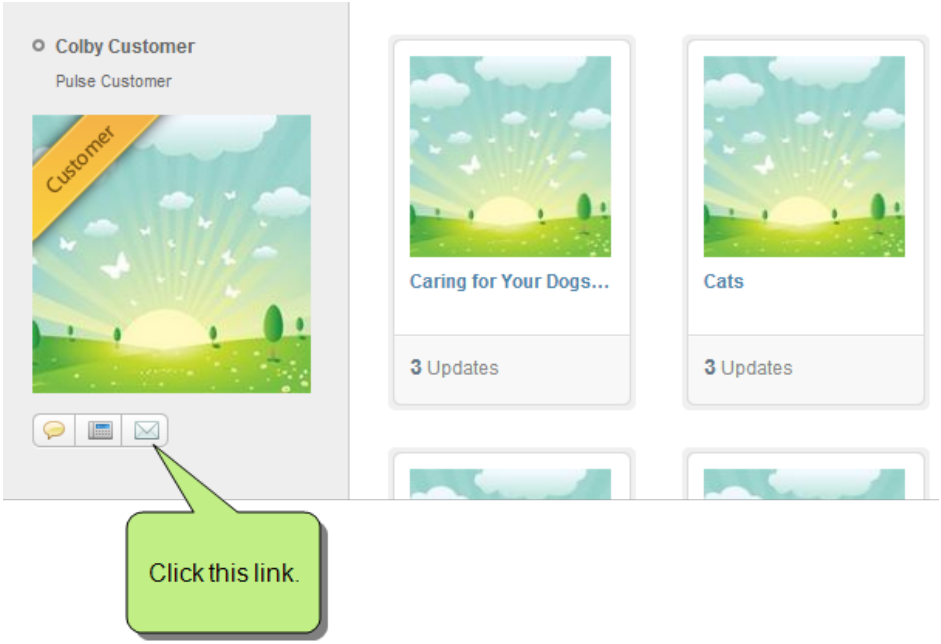
1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse>Messages**.
   - In the top-right corner of the page, click the button.
3. In the Messages page, click one of your messages. This opens the message or conversation.
4. In the space provided, type your reply.
5. If you want to add an attachment, click **Add Attachment**. Then select the file to attach.
6. Click **Reply**.

Contacting Users by Email

If your computer is set up with a local email client, such as Microsoft Outlook, you can launch the client application from Pulse. This lets you send an email from your regular email account using the HTML "mailto" command (e.g., mailto:-name@example.com).

HOW TO CONTACT USERS BY EMAIL

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **People>Find People**.
3. In the Find People page, click the desired user.
4. Click the email link.



If your computer is properly configured, this opens your email client. If you do not know how to configure an email client on your computer, please see your IT or Email Administrator.

Customizing the Your Apps Menu

This feature is available to members of the **Administrators** and **Employees** group.

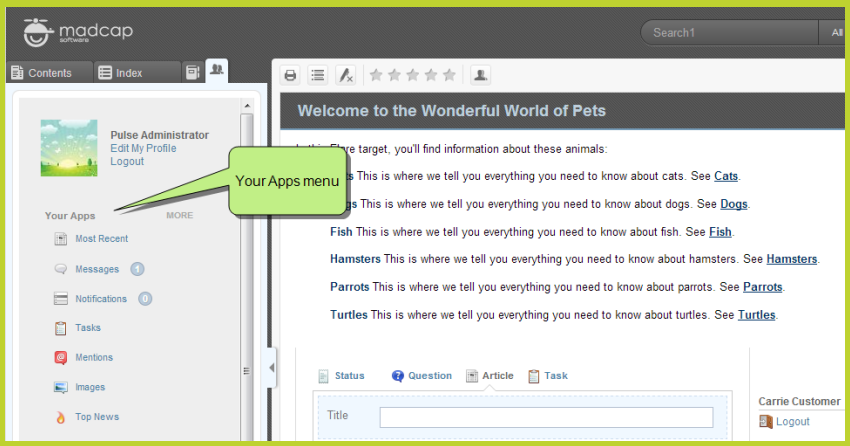
If you are a member of the Administrators or Employees group, you have the ability to customize the Your Apps menu commands that appear in the left navigation pane of your user feed. In addition, a number of the commands that are available in the Your Apps menu are also available in the left navigation area of the group, tag, and topic feeds in Pulse.

About the Your Apps Menu

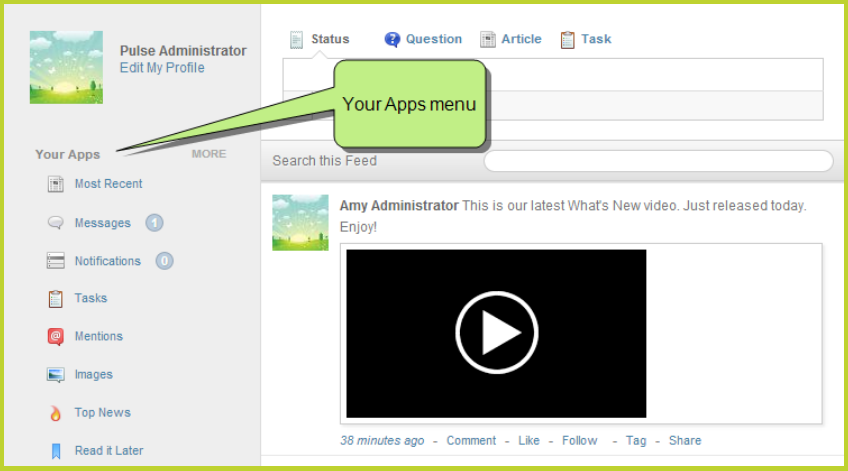
In order to view the Your Apps menu, you must be logged into Pulse from either the Pulse dashboard or the Flare output. In the Flare output, you can access the Your Apps menu by selecting the **Community** tab. In the Pulse dashboard, select the **Pulse>Home** menu command to view the Your Apps menu in your user feed. You can also navigate to different group, tag, and topic feeds and use the commands that are available in the left navigation pane.

E X A M P L E S

The Your Apps menu in the Flare output:



The Your Apps menu in your user feed on the Pulse dashboard:



LIST OF AVAILABLE APPS

The table below details the apps that are available in the Your Apps menu on your user feed (or in the left navigation pane of the group, tag, or topic feeds in Pulse). An asterisk (*) by the App Name denotes that an app is available by default on the Your Apps menu of your user feed.

App Name	Description	Group Feed	Tag Feed	Topic Feed	User Feed	Learn More
Articles	Read and review the articles posted to Pulse (see "Posting Articles" on page 305). **Note:** For an article to appear as an update when using the Articles app on your user feed, you must be following the group, tag, topic, or user feed where the article was posted. See "Following Community Activities" on page 381.	✓	✓	✓	✓	"Articles " on page 343
Files	View and filter a list of all the files posted to Pulse. See "Posting Status Updates" on page 297. **Note:** For a file to appear as an update when using the Files app on your user feed, you must be following the group, tag, topic, or user feed where the file was posted. See "Following Community Activities" on page 381.	✓	✓	✓	✓	"Files" on page 346
Find Experts	Shows the users who posted answers to tagged questions (see "Tagging Posts" on page 314 and "Responding to Questions" on page 392). As other users vote on answers, the user who gets the most positive votes is ranked higher on the experts list.	✗	✓	✗	✗	"Finding Experts" on page 379

App Name	Description	Group Feed	Tag Feed	Topic Feed	User Feed	Learn More
Images	Lets you view and filter a list of all the images posted to Pulse. See "Posting Status Updates" on page 297. **Note:** For an image to appear as an update when using the Images app on your user feed, you must be following the group, tag, topic, or user feed where the image was posted. See "Following Community Activities" on page 381.	✓	✓	✓	✓	"Images" on page 351
Links	View and filter a list of all the links posted to Pulse. **Note:** For a file link to appear as an update when using the Links app on your user feed, you must be following the group, tag, topic, or user feed where the link was posted. See "Following Community Activities" on page 381.	✓	✓	✓	✓	"Links" on page 355
Mentions*	Shows all of the times you were mentioned in a conversation. See "Mentioning Documents, People, and Groups" on page 319.	✗	✗	✗	✓	"Mentions" on page 357
Messages*	View and send messages to other users.	✗	✗	✗	✓	"Messages" on page 358
Most Recent*	View and moderate the recent Pulse community activity.	✗	✗	✗	✓	"Most Recent" on page 361

App Name	Description	Group Feed	Tag Feed	Topic Feed	User Feed	Learn More
Notifications*	Shows all of the notifications you've received from the Pulse system. See "Notifications" on page 324. **Note:** For a notification to appear as an update when using the Notifications app on your user feed, you must be the recipient of a notification or following the group, tag, topic, or user feed where the corresponding notification activity was posted. See "Following Community Activities" on page 381.	✗	✗	✗	✓	"Notifications" on page 362
Profile	Open the Settings to update your profile. See "Editing Your Profile" on page 293.	✗	✗	✗	✓	"Profile" on page 364
Questions	Read and respond to the questions added to Pulse. See "Posting Questions" on page 301. **Note:** For a question to appear as an update when using the Questions app on your user feed, you must be following the group, tag, topic, or user feed where the question was posted. See "Following Community Activities" on page 381.	✓	✓	✓	✓	"Questions" on page 364
Read it Later	Bookmark posts to add it to your read it later list. See "Bookmarking a Post to Read it Later" on page 389.	✗	✗	✗	✓	"Read It Later" on page 367
Tasks*	Assign and manage tasks. See "Assigning Tasks" on page 307.	✓	✓	✓	✓	"Tasks" on page 369

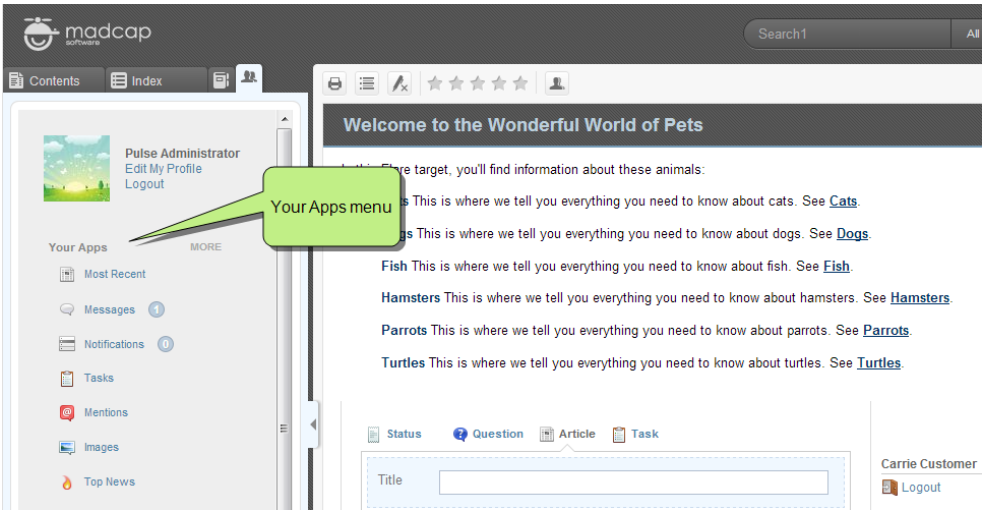
App Name	Description	Group Feed	Tag Feed	Topic Feed	User Feed	Learn More
Top News	Shows you the most active posts in Pulse. **Note:** For an activity to appear as an update when using the Top News app on your user feed, you must be following the group, tag, topic, or user feed where the activity was posted. See "Following Community Activities" on page 381.	✗	✗	✗	✓	"Top News" on page 375
Updates	Shows the latest updates posted to the selected feed.	✓	✓	✓	✗	Simply click the **Updates** link to view the latest posts.
Videos	View and filter a list of all the videos posted to Pulse. See "Posting Status Updates" on page 297. **Note:** For a video to appear as an update when using the Videos app on your user feed, you must be following the group, tag, topic, or user feed where the video was posted. See "Following Community Activities" on page 381.	✓	✓	✓	✓	"Videos" on page 377

Customizing Menu Commands

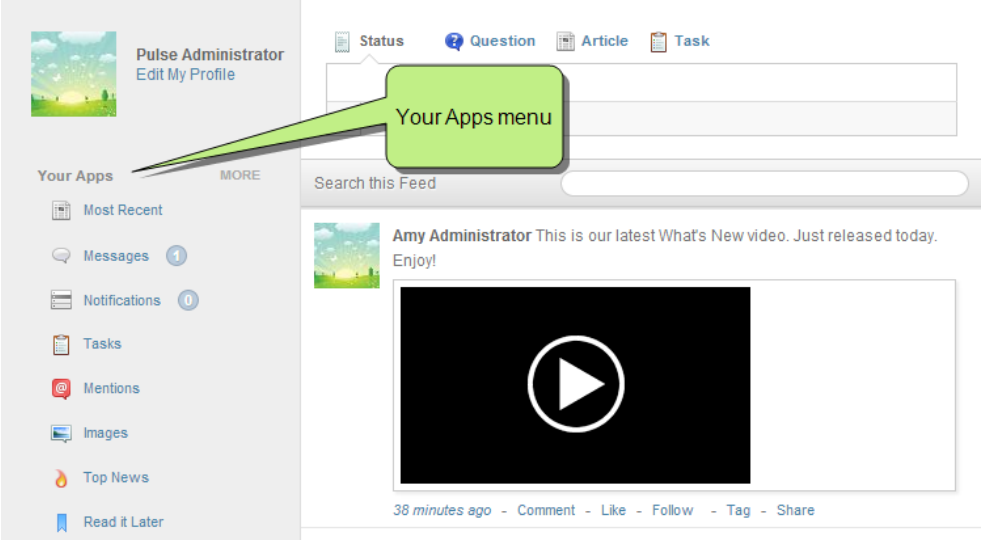
Use the following steps to customize menu commands on the Your Apps menu.

HOW TO CUSTOMIZE THE MENU COMMANDS ON THE YOUR APPS MENU

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Depending on where you logged in, select the appropriate option:
   - **Flare Output** If you logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

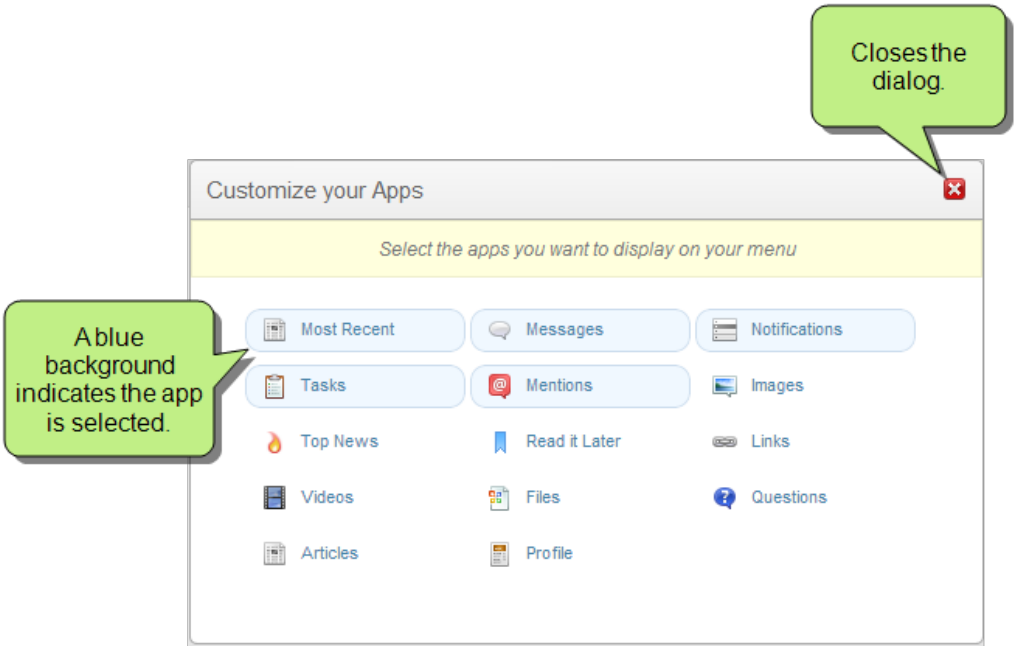


» **Dashboard** If you logged into the Pulse dashboard, choose **Pulse>Home** to view the Your Apps menu in your user feed.



3. Click the **MORE** link. This opens the Customize Your Apps dialog.

4. Select the apps that you want to display in your user feed from the menu. A blue background indicates the app is selected. This will not have an effect on the availability of menu commands on the group, tag, or topic feeds.



5. Close the Customize Your Apps dialog. The Your Apps menu is updated with your selections.

Articles

This feature is available to members of the **Administrators** and **Employees** group.

The Articles app gives you the ability to read the articles that have been posted to a specific group, tag, topic, or user feed. In addition, it gives you the ability to edit the articles you've posted to a feed. If you post an article, you have the ability to delete it. If you are a member of the Administrators group, you can also delete the articles that others post. To learn how to post an article, see "Posting Articles" on page 305.

About the Your Apps Menu

Use the following steps to open the Articles app.

HOW TO OPEN THE ARTICLES APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Articles**.

   This reveals any articles that have been posted to the selected group, tag, topic, or user feed.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Editing an Article

Use the following steps to edit an article.

HOW TO EDIT AN ARTICLE

You can edit the body text of an article, but not the title. In addition, you can only edit the articles that you post.

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Articles**.
3. In the Articles page under the desired post, click **Edit**. This link is only available if you posted the original article.

4. In the article page, you may edit only the body of the article. You cannot modify article titles.

Deleting an Article

Use the following steps to delete an article.

HOW TO DELETE AN ARTICLE

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Articles**.
3. In the Articles page under the desired post, click the ✖ link. Remember these rules for deleting articles:
   - If you are a member of the Administrators group, you may delete any article.
   - If you are a member of the Employees group, you can only delete the articles you create.
4. In the Confirm Delete Activity box, click **Delete Activity**.

Files

This feature is available to members of the **Administrators** and **Employees** group.

The Files app is available on group, tag, topic, and user feeds. It gives you the ability to view a list of files that have been shared on the selected feed when posting a status update (see "Posting Status Updates" on page 297). If you share a file, you have the ability to delete it later. If you are a member of the Administrators group, you also have the ability to delete files posted by other users.

Opening the Files App

Use the following steps to open the Files app.

HOW TO OPEN THE FILES APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Files**.

   This reveals any files that have been posted to the group, tag, topic, or user feed.

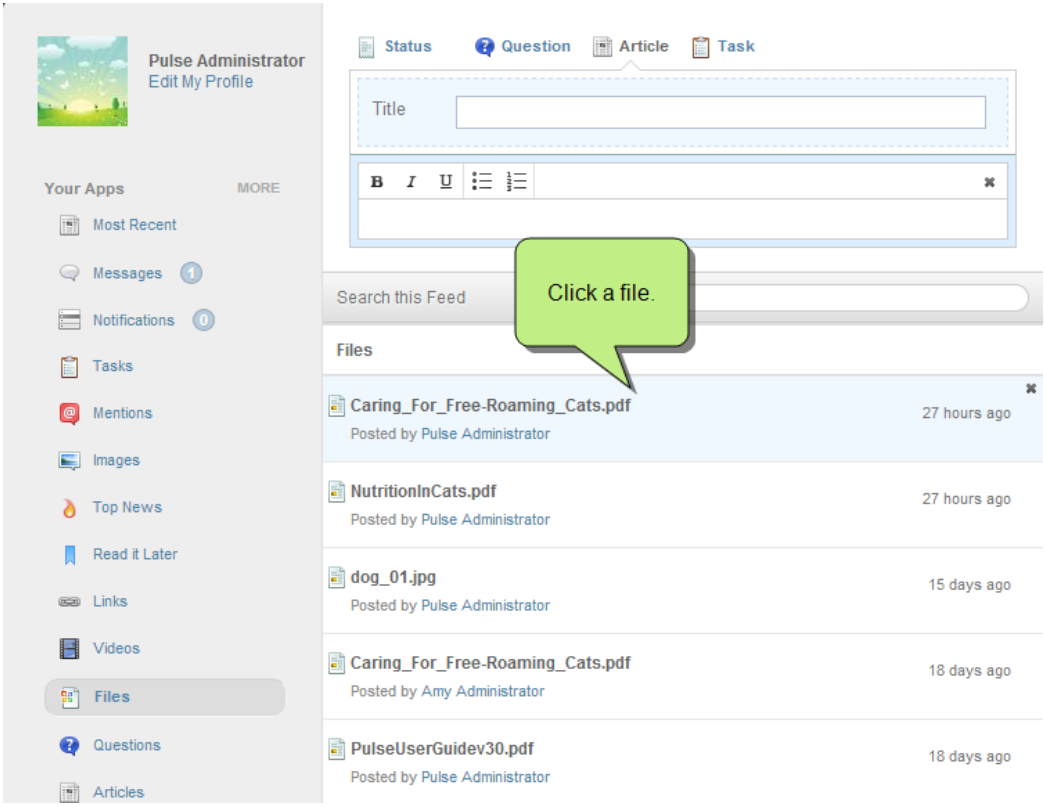
   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Working With File Options

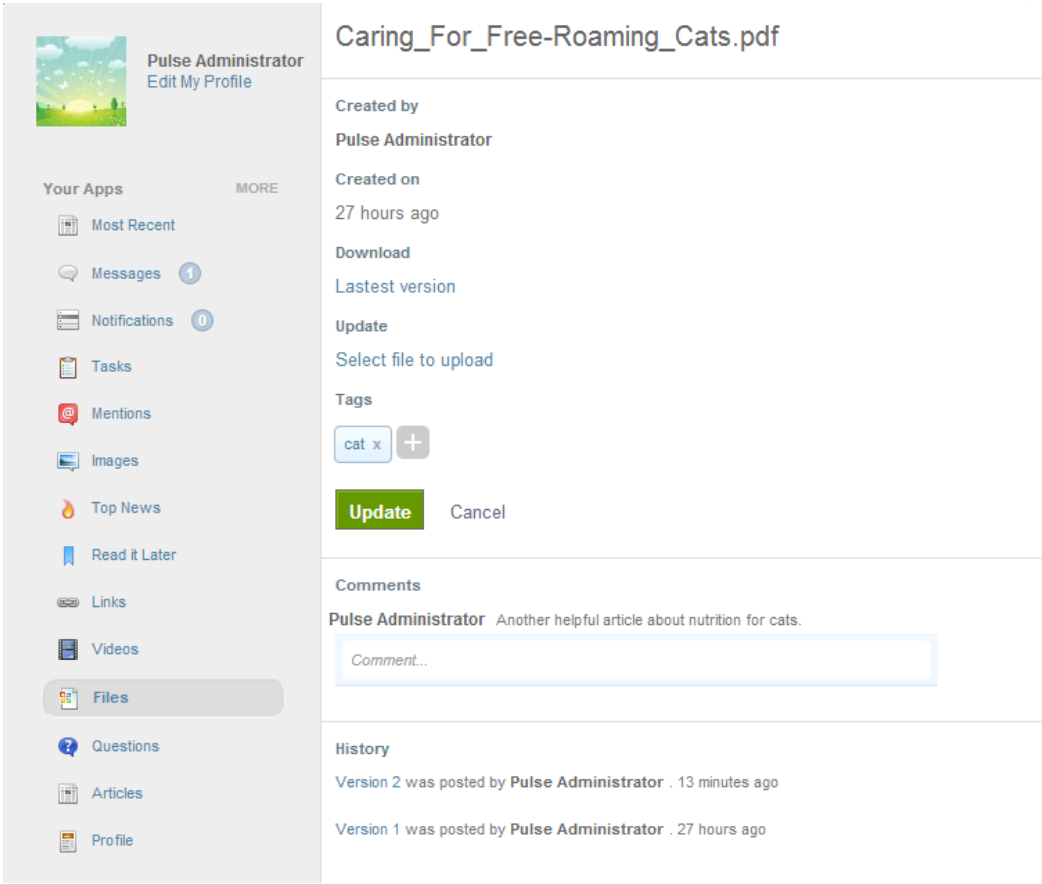
Use the following steps to work with file options.

HOW TO WORK WITH YOUR FILE OPTIONS

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click the **Files** app.
3. In the Files page, click the desired file.



This reveals a file information pane.


Pulse Administrator
Edit My Profile
Your Apps
MORE
Most Recent
Messages 1
Notifications 0
Tasks
Mentions
Images
Top News
Read it Later
Links
Videos
Files
Questions
Articles
Profile
Caring_For_Free-Roaming_Cats.pdf
Created by
Pulse Administrator
Created on
27 hours ago
Download
Lastest version
Update
Select file to upload
Tags
cat x
Update
Cancel
Comments
Pulse Administrator Another helpful article about nutrition for cats.
Comment...
History
Version 2 was posted by Pulse Administrator . 13 minutes ago
Version 1 was posted by Pulse Administrator . 27 hours ago

4. In the file information pane, choose from these options:

   HOW TO DOWNLOAD A FILE

   You have these options:

   - **Download Latest Version** To download the most recent version , click the **Latest Version** link.

     OR

   - **Download Previous Version** To download a previous version, scroll to the **History** area at the bottom of the page. Then click one of the previous version links.

     Note: Pulse retains the last five versions of a file.

   HOW TO UPDATE A FILE

   If you make changes to a file and want to make those updates available to other Pulse users, you can upload a new version of the file by clicking the **Select file to upload** link.

   HOW TO TAG A FILE

   a. In the **Tags** area, click .
   b. Type the desired tag and press **Enter** to add it.

   HOW TO COMMENT ON A FILE

   a. In the **Comment** field, type your comment.
   b. Click the **Comment** button to post it.

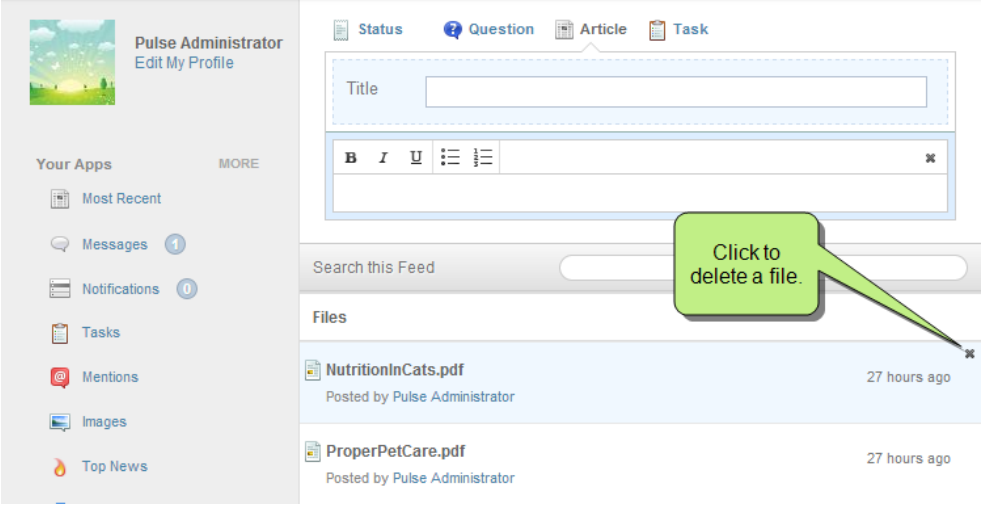
5. When finished updating the file information, click **Update**.

Deleting a File

Use the following steps to delete a file.

HOW TO DELETE A FILE

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click the **Files** app.
3. In the Files page under the desired post, click ✖. Remember these rules for deleting posts:
   - If you are a member of the Administrators group, you may delete any file.
   - If you are a member of the Employees group, you can only delete the files that you shared in Pulse.



4. In the Confirm Delete Activity dialog, click **Delete Activity** to permanently remove the file.

Images

This feature is available to members of the **Administrators** and **Employees** group.

The Images app is available in group, tag, topic, and user feeds. It gives you the ability to view and moderate a gallery of images that have been added to Pulse by registered users. You can access this gallery from the Community tab in the Flare output or the Pulse dashboard.

Opening the Images App

Use the following steps to open the Images app.

HOW TO OPEN THE IMAGES APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Images**.

   This reveals any images that have been shared on the selected group, tag, topic, or user feed.

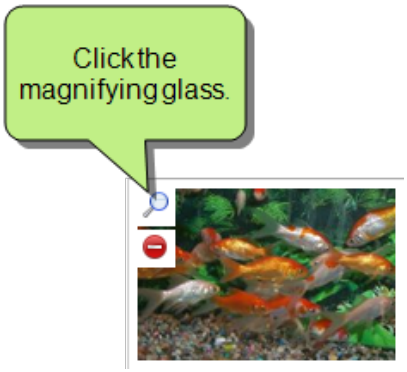
   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Opening an Image

Use the following steps to open an image.

HOW TO OPEN AN IMAGE

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Images**.
3. In the images page, hover over an image. When the magnifying glass appears, click it.



This opens the image in a popup window.

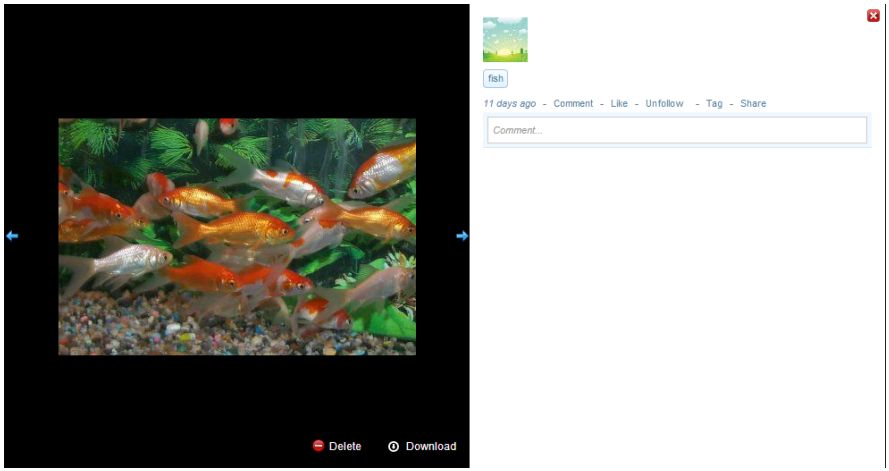
Deleting an Image

Use the following steps to delete an image.

HOW TO DELETE AN IMAGE

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Images**.
3. Choose one of these options to delete the image:
   - In the images page, hover the mouse cursor over an image and click the delete link.

   - In the images page, hover over an image. When the magnifying glass appears, click it. This opens the image in a popup window. Then click the **Delete** link.



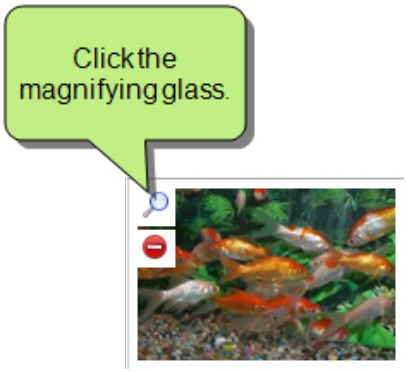
4. In the Confirm Delete Activity dialog, click **Delete Activity** to remove the image.

Downloading Images

Use the following steps to download an image.

HOW TO DOWNLOAD AN IMAGE

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Images**.
3. In the Images page, hover over an image. When the magnifying glass appears, click it.



   This opens the image in a popup window.

4. In the popup window, click the **Download** link.

Links

This feature is available to members of the **Administrators** and **Employees** group.

The Links app gives you the ability to view a list of file links that have been shared in status updates posted to group, tag, topic, and user feeds (see "Posting Status Updates" on page 297). You can edit or delete the file links that you post. If you are a member of the Administrators group, you can also delete other user's status updates to remove links.

Opening the Links App

Use the following steps to open the Links app.

HOW TO OPEN THE LINKS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Links**.

   This reveals any links that have been posted to the group, tag, topic, or user feed.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Deleting a Link

Use the following steps to delete a link.

HOW TO DELETE A LINK

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Links**.
3. In the Links page, click ✖ next to the post that you want to delete. Remember these rules for deleting information:
   - If you are a member of the Administrators group, you may delete any post containing a hyperlink.
   - If you are a member of the Employees group, you can only delete the posts that you shared in Pulse.
4. In the Confirm Delete Activity dialog, click **Delete Activity** to permanently remove the selected post and hyperlink.

Mentions

This feature is available to members of the **Administrators** and **Employees** group.

The Mentions app is available in your user feed. It gives you the ability to see all the times you were mentioned in post by other Pulse users. To learn how to mention a user by name in a post, see "Using Mentions" on page 403 and "Mentioning Documents, People, and Groups" on page 319.

HOW TO OPEN THE MENTIONS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to your user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu, click **Mentions**.

   This reveals a list of all the posts where your user name was mentioned.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Messages

This feature is available to members of the **Administrators** and **Employees** group.

The Messages app is available in your user feed and gives you the ability to exchange messages with other Pulse users. It also gives you the ability to hide your messages.

Opening the Messages App

Use the following steps to open the Messages app.

HOW TO OPEN THE MESSAGES APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to your user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu, click **Messages**.

   This reveals a list of your Pulse messages.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Creating New Messages

Use the following steps to create a new message.

HOW TO CREATE A NEW MESSAGE

1. Navigate to your user feed.
2. In the Your Apps menu, click **Messages**.
3. In the Messages page, click **New Message**.
4. In the Messages dialog, do the following:
   - **To** Start typing the name of a registered user and then select the appropriate match from the list.
   - **Message** Type the body of your message in the space provided.
   - **Add Attachment** Click to add a file attachment.
5. When finished, click **Send**. The message is sent to the user and a copy of the conversation thread appears in the Messages page.

Reading and Replying to Messages

Use the following steps to read and reply to messages.

HOW TO READ AND REPLY TO A MESSAGE

1. Navigate to your user feed.
2. In the Your Apps menu, click **Messages**. Your messages appear in the list.
3. In the Messages page, click one of the messages in the list to open the conversation thread.
4. (Optional) If you want to reply to a message, choose from these options:
   - Type a reply in the space provided.

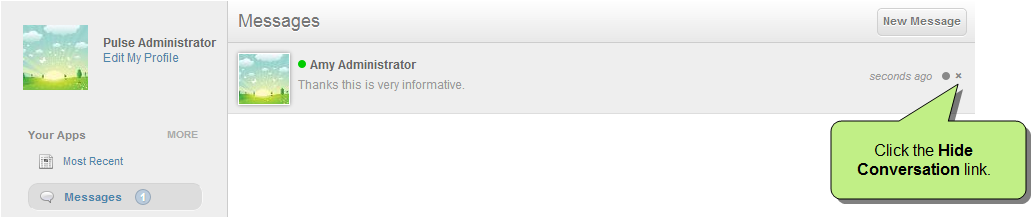
     AND/OR
   - Click the paperclip to add an attachment.
5. Click **Reply**.

Hiding Conversations

Use the following steps to hide a conversation.

HOW TO HIDE A CONVERSATION

1. Navigate to your user feed.
2. In the Your Apps menu, click **Messages**. Your messages appear in the list.
3. In the Messages page, click the **Hide Conversation** link to remove it from the page.



Most Recent

This feature is available to members of the **Administrators** and **Employees** group.

The Most Recent app is available in your user feed and gives you the ability view the latest community activity in Pulse. This includes status updates, questions, articles, and more. This is a helpful way to view updates in chronological order.

HOW TO VIEW THE MOST RECENT ACTIVITY

You can open the Most Recent page from the Flare output or Pulse dashboard.

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu (or left navigation pane), click **Most Recent**.

   This reveals the most recent post activities for the selected group, tag, topic, or user feed.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.
4. Review the content in the list. You can comment, like, edit, follow, tag, and share the most recent posts.

Notifications

This feature is available to members of the **Administrators** and **Employees** group.

The Notifications app is available in your user feed and gives you the ability to view and filter a list of Pulse notifications. You can open the Notifications app from the Community tab of the Flare output or Pulse dashboard.

Opening the Notifications App

Use the following steps to open the Notifications app.

HOW TO OPEN THE NOTIFICATIONS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to your user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu, click **Notifications**.

   This reveals a list of your Pulse notifications.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.
4. Review the notifications in the list. You can click the available links to navigate to any items of interest.

Viewing a List of Notifications

Use the following steps to view a list of notifications.

HOW TO VIEW A LIST OF NOTIFICATIONS

1. Navigate to your user feed.
2. In the Your Apps menu, click the **Notifications** app.
3. In the Notifications page, review the activity in the Notifications page. You can click the hyperlinks to view the related content.

Filtering Notifications

Use the following steps to filter notifications.

HOW TO FILTER THE NOTIFICATIONS

1. Navigate to your user feed.
2. In the Your Apps menu, click the **Notifications** app.
3. In the Notifications page, click one of the buttons to view only that type of content.

Profile

This feature is available to members of the **Administrators** and **Employees** group.

In the Your Apps menu, the Profile menu item opens the Settings page so you can edit your profile. See "Editing Your Profile" on page 293.

Questions

This feature is available to members of the **Administrators** and **Employees** group.

The Articles app gives you the ability to read the questions that have been posted to a specific group, tag, topic, or user feed. If you are a member of the Administrators group, you also have the ability to delete the questions and answers that have been posted.

Opening the Questions App

Use the following steps to open the Questions app.

HOW TO OPEN THE QUESTIONS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu (or left navigation pane), click **Questions**.

   This reveals any questions that have been posted to the group, tag, topic, or user feed.

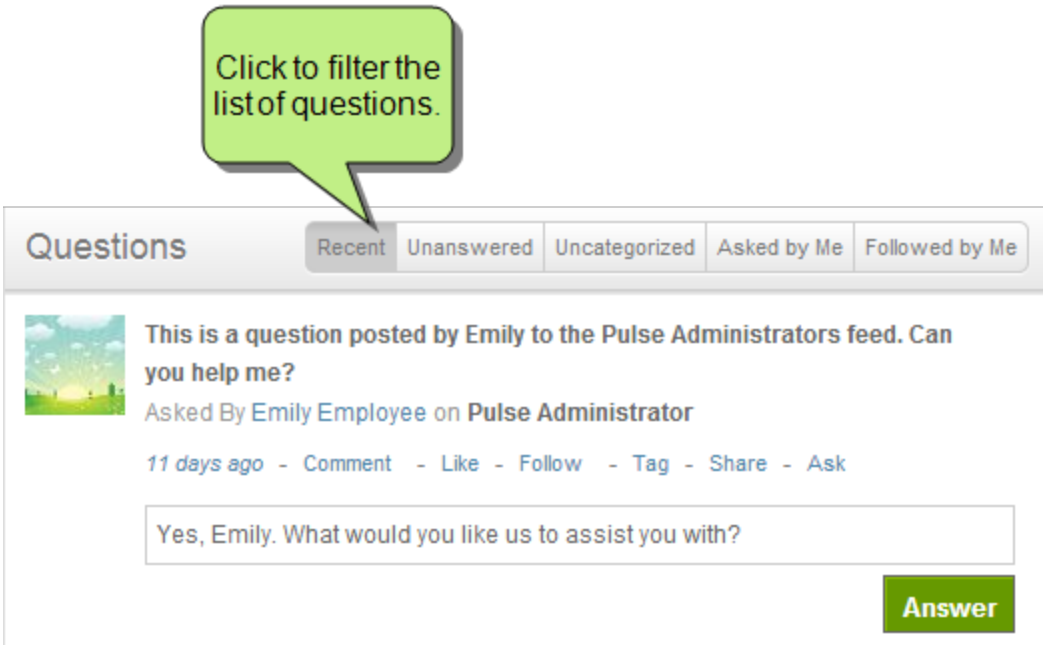
   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Filtering Questions

Use the following steps to filter questions.

HOW TO FILTER THE QUESTIONS

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane), click **Questions**.
3. In the Questions page, click one of the buttons at the top of the list to filter the list of questions. You can filter questions by:
   - **Recent** View the most recent questions.
   - **Unanswered** View any unanswered questions.
   - **Uncategorized** View the questions that have not been tagged.
   - **Asked by Me** View the questions you posted.
   - **Followed by Me** View questions asked by people you follow.



Answering Questions

Use the following steps to answer a question.

HOW TO ANSWER A QUESTION

1. Navigate to the desired group, tag, topic, or user feed.
2. Under the question, click **Answer**.
3. In the **Answer** field, type a response.
4. Click **Answer** to submit the answer.

Deleting Questions

Use the following steps to delete a question.

HOW TO DELETE A QUESTION

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane), click **Questions**.
3. In the Questions page under the desired post, click ✖. Remember these rules for deleting information:
   - If you are a member of the Administrators group, you can delete any question.
   - If you are a member of the Employees group, you can only delete the questions you posted.
4. In the Confirm Delete Activity dialog, click **Delete Activity** to permanently remove the file.

Read It Later

This feature is available to members of the **Administrators** and **Employees** group.

The Read it Later app is available in your user feed and gives you the ability to view the post activity that you bookmarked earlier. See "Bookmarking a Post to Read it Later" on page 389.

Opening the Read It Later App

You can open your personalized read it later page from the Flare content or Pulse dashboard.

HOW TO OPEN THE READ IT LATER APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu, click **Read it Later**.

   The reveals a list of all the posts you have bookmarked. See "Bookmarking a Post to Read it Later" on page 389.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Reviewing a Read It Later Post

For each post that you add to your read it later page, you have these options:

- **Comment** Post a comment.
- **Like** Like the post.
- **Follow** Follow post activities.
- **Tag** Add a tag to the post.
- **Share** Share the post with other registered users.

Removing a Post From Your Read It Later Page

If you want to remove the bookmark, click the blue icon until it turns gray. A gray checkmark indicates the next time you open or refresh the page, the post will no longer appear on your Read it Later page.

Tasks

> This feature is available to members of the **Administrators** and **Employees** group.

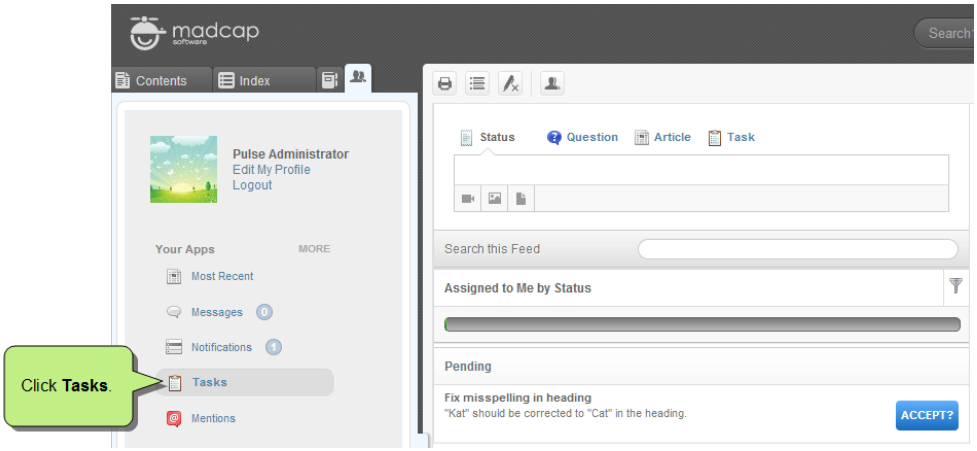
The Tasks app gives you the ability to create, view and manage task activity. You can open the Tasks app from the Community tab of the Flare output or Pulse dashboard.

Opening the Tasks App

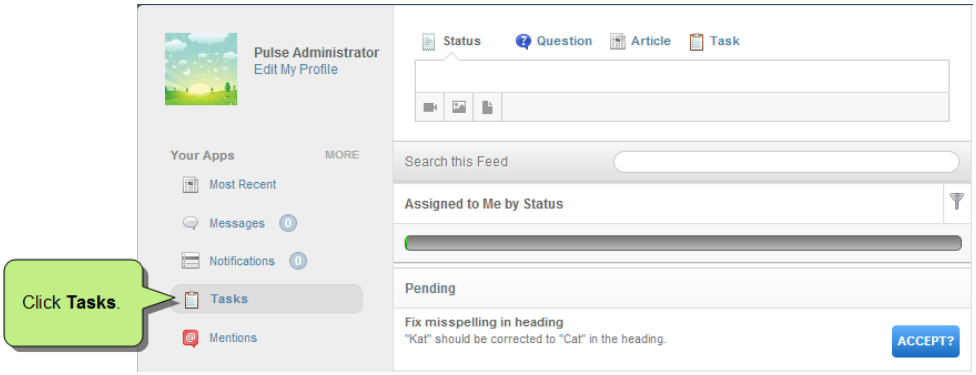
Use the following steps to open the Tasks app.

HOW TO OPEN THE TASKS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.



» If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.



3. In the Your Apps menu (or left navigation pane), click **Tasks**.

   This reveals a list of all the tasks for the selected group, tag, topic, or user feed.

> **Note:** You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Managing Your Tasks

If you are a member of the Administrators or Employees group and a user assigns you a task in Pulse, you have the option to accept or decline the task. You can also update the task.

HOW TO MANAGE YOUR TASKS

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane), click **Tasks**.
3. In the Tasks page, any tasks that have been assigned to you appear in the list. You have these options:

   HOW TO DECLINE A TASK

   In the Tasks page, click the **ACCEPT?** button. Then select **Decline Task** from the context menu.

   A task declined message appears and the status of the button label changes to declined.

   HOW TO ACCEPT A TASK

   In the Tasks page, click the **ACCEPT?** button. Then select **Accept Task** from the context menu.

   HOW TO MARK A TASK COMPLETE

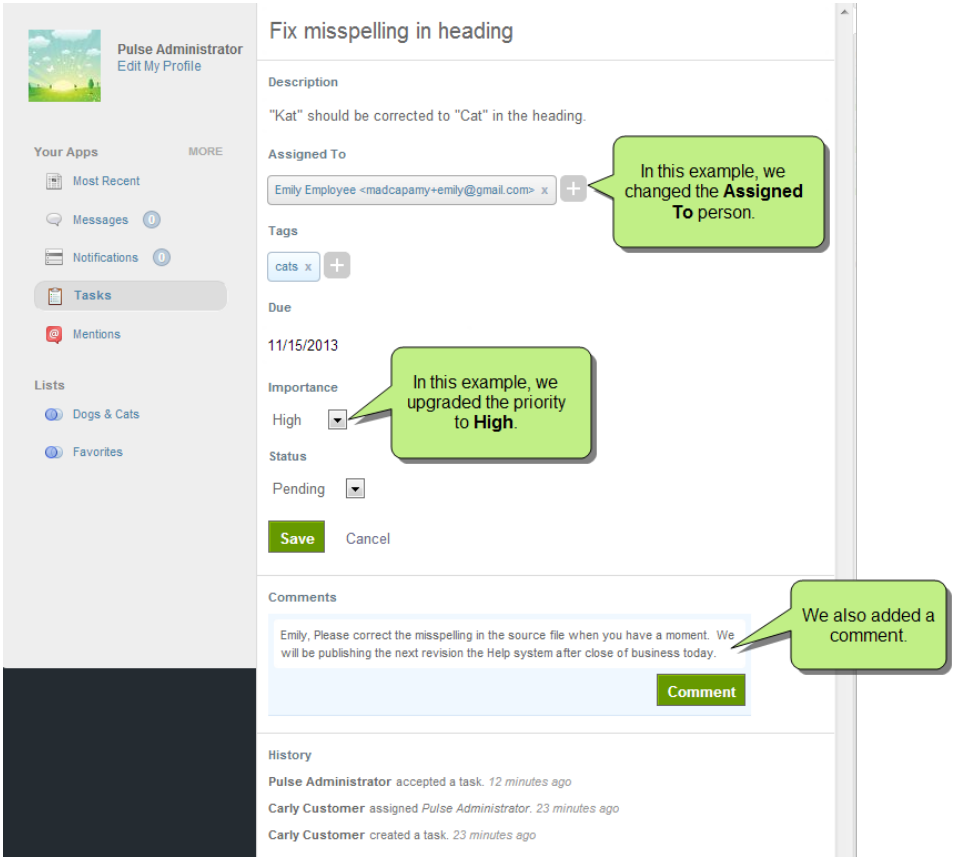
   In the Tasks page, click the **ACCEPT?** button. The select **Mark Complete**. This immediately places the task to the completed status.

   HOW TO UPDATE A TASK

   1. In the Tasks page, click a task to view the details:

   The tasks pane opens.

2. In the task pane, make any desired changes.

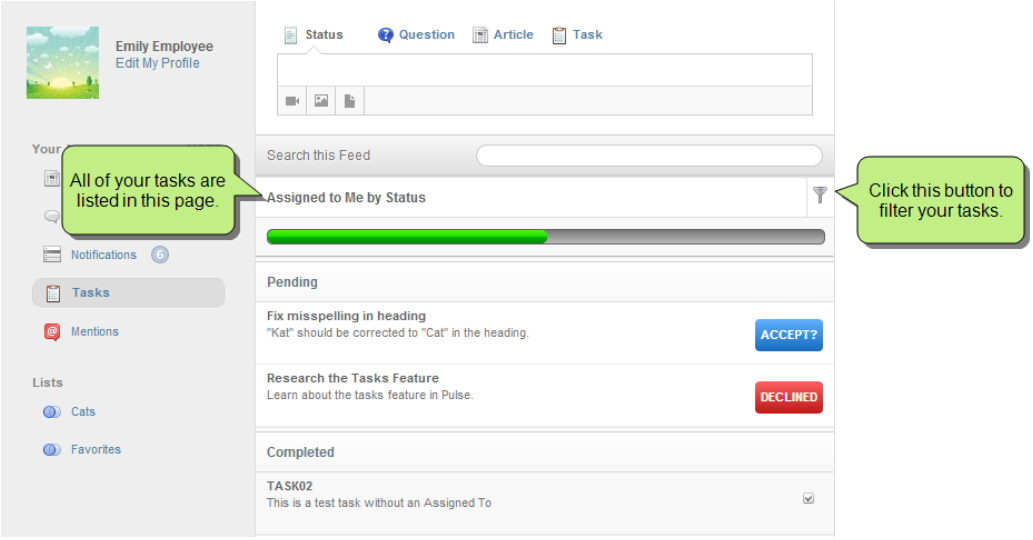


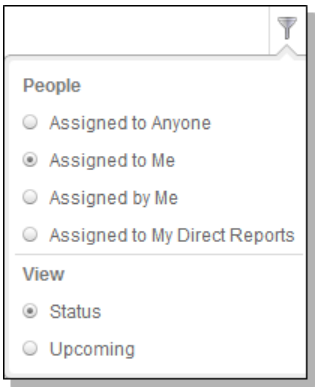
3. Click **Save**.

HOW TO FILTER TASKS

By default, the Tasks page shows a list of all the tasks that have been assigned to you.

You can filter the list display by clicking and selecting from the options detailed below.





HOW TO FILTER TASKS BY PEOPLE

Click and select one of these options from the drop-down menu:

- **Assigned to Anyone** Shows tasks assigned to you and tasks assigned to others by you.
- **Assigned to Me** Shows tasks assigned to you
- **Assigned by Me** Shows tasks that you assigned to other users.
- **Assigned to My Direct Reports** Shows tasks assigned to your Direct Reports folder. Direct Reports is an option you can select in the Notifications tab of the Settings page that deliver daily reports to your email. See "Editing Your Profile" on page 293.

HOW TO FILTER TASKS BY VIEW

In the Your Apps menu, click **Tasks**. Then click and select one of these options from the drop-down menu:

- **Status** Shows tasks assigned by current status.
- **Upcoming** Shows tasks with upcoming due dates.

Top News

This feature is available to members of the **Administrators** and **Employees** group.

The Top News app is available in your user feed. It gives you the ability to create, view, and manage the most popular activity in Pulse.

Opening the Top News App

Use the following steps to open the Top News app.

HOW TO OPEN THE TOP NEWS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu, click **Top News**.

   This reveals the top news in your user feed.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Deleting a Top News Post

Use the following steps to delete a Top News post.

HOW TO DELETE A TOP NEWS POST

1. Navigate to your user feed.
2. In the Your Apps menu, click **Top News**.
3. In the Top News page, click ✖ next to the post that you want to delete. Remember these rules for deleting information:
   - If you are a member of the Administrators group, you may delete any post containing a hyperlink.
   - If you are a member of the Employees group, you can only delete the posts that you shared in Pulse.
4. In the Confirm Delete Activity dialog, click **Delete Activity** to permanently remove the Top News post.

Videos

This feature is available to members of the **Administrators** and **Employees** group.

The Videos app is available in the group, tag, topic, and user feeds. It gives you the ability to view a list of all of the videos that users have shared in Pulse. You can also delete the videos that have been posted.

Opening the Videos App

Use the following steps to open the Videos app.

HOW TO OPEN THE VIDEOS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Choose the appropriate option:
   - If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

     OR
   - If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
3. In the Your Apps menu (or left navigation pane), click **Videos**.

   This reveals any videos that have been shared on the group, tag, topic, or user feed.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 334.

Deleting a Video

Use the following steps to delete a video.

HOW TO DELETE A VIDEO

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane), click **Videos**.
3. In the Videos page, click ✖ next to the video that you want to delete. Remember these rules for deleting information:
   - If you are a member of the Administrators group, you may delete any post containing a video.
   - If you are a member of the Employees group, you can only delete the posts that you shared in Pulse.
4. In the Confirm Delete Activity dialog, click **Delete Activity** to permanently remove the video.

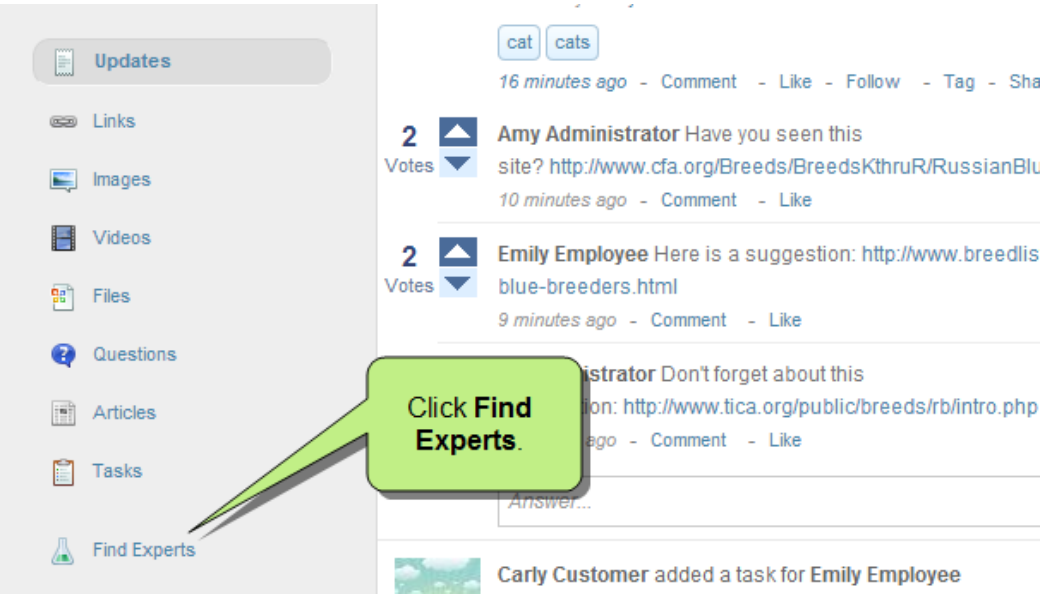
Finding Experts

This feature is available to members of the **Administrators** and **Employees** group.

The Find Experts feature works with tags and questions (see "Tagging Posts" on page 314 and "Responding to Questions" on page 392). When your users vote on the best answers to questions, the user who posts the most answers and gets the most votes are ranked on an experts list.

HOW TO FIND AN EXPERT

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Tags>Find Tag**.
3. In the Find Tags list, click the desired tag to open its page.
4. At the bottom of the tag page, click the **Find Experts** link.



The Find Experts page opens. This page ranks all of the users who have posted answers to questions with the specific tag. It also shows the total number of votes the answer has received.

Your Rank : #4

Answer more questions in the topic cats to increase your rank as a cats expert.

Rank	Person	Answers	Votes
1	Amy Administrator	2	5
2	Carrie Customer	1	4
3	Emily Employee	1	2
4	Al Administrator	1	1

Following Community Activities

This feature is available to members of the **Administrators** and **Employees** group.

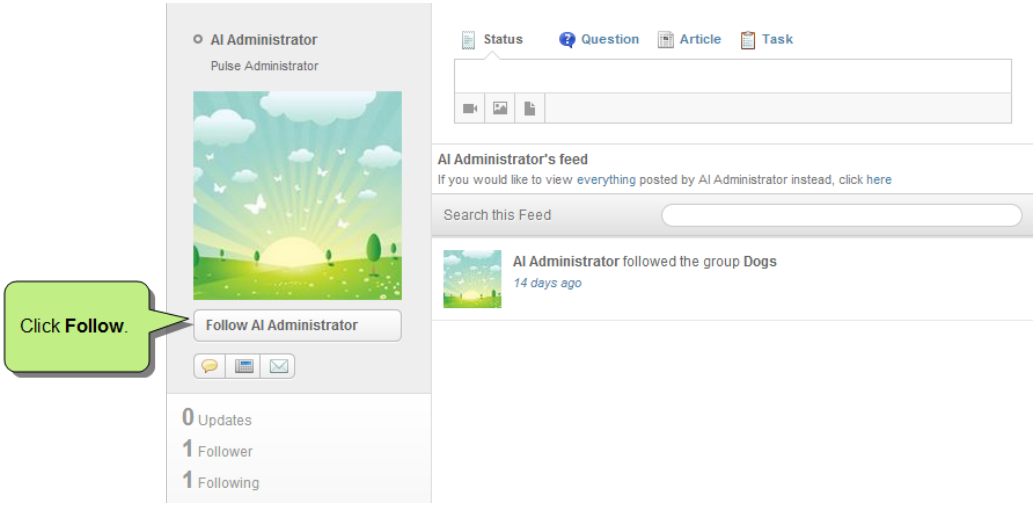
To help you stay connected with your users, members of the Administrators and Employees group can follow a variety of community activities. Following activities gives you the ability to view updates in the Your Apps menu on the Home page (Pulse>Home) of the Pulse dashboard. See "Customizing the Your Apps Menu" on page 334.

Following Users From the Pulse Dashboard

You can follow other users who are members of the Administrators or Employees group.

HOW TO FOLLOW A USER—PULSE DASHBOARD

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **People>Find People**.
3. In the Find People page, locate and click the name of the user that you want to follow. This opens the user's system feed.



> **Note:** You can only follow users who are members of the Administrators or Employees group.

4. Click the **Follow** button. Pulse will now notify you about user activities. After following a user, you have these options:

   HOW TO OPEN YOUR FOLLOWED BY ME LIST

   a. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
   b. Select **People>Followed by Me**. This opens a list of all the users that you follow.

   HOW TO STOP FOLLOWING A USER

   a. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
   b. Select **People>Followed by Me**. This opens a list of all the users that you follow.
   c. Click the user you want to stop following. This opens the user's feed.
   d. Click **Unfollow**. Pulse will not longer notify you about activities involving that user.

Following Users From the Flare Output

You can follow other users who are members of the Administrators or Employees group.

HOW TO FOLLOW A USER—FLARE OUTPUT

1. Log in to the Flare output using an account that is a member of the Administrators or Employees group.
2. In the Pulse form, hover over the name of the user you want to follow. A popup window appears.
3. Click **Follow**. Pulse will now notify you about user activities. After following a user, you have these options:

> **Note:** You can only follow other members of the Administrators or Employees group.

HOW TO STOP FOLLOWING A USER

1. Log in to the Flare output using an account that is a member of the Administrators or Employees group.
2. In the Pulse form, hover over the name of the user you want to stop following. Then click **Unfollow**. Pulse will not longer notify you about activities involving that user.

Following Searches

You can search for Pulse content in the Pulse dashboard and then follow your searches.

HOW TO FOLLOW SEARCHES

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. In the search field, type your search term. Then select **Search for Posts with this Phrase** from the context menu.
3. In the results page, click **Follow**.

Following Topics

You can subscribe to a feed when you want to follow any community activity for a topic. You can also add a topic's feed to your Favorites list:

- **Subscribe to a Feed** See "Subscribing to Feeds" on page 401.
- **Work With Favorites** See "Working With Favorites" on page 404.

Note: Following posts is available to all registered Pulse users. See "Following Posts" on page 311.

Note: Users can apply tags to posts. Tags make it easier for readers to find posts about a specific subject in Pulse. For example, you can tag all topics about cats with a "cat" tag. See "Tagging Posts" on page 314.

Inviting People

This feature is available to members of the **Administrators** and **Employees** group.

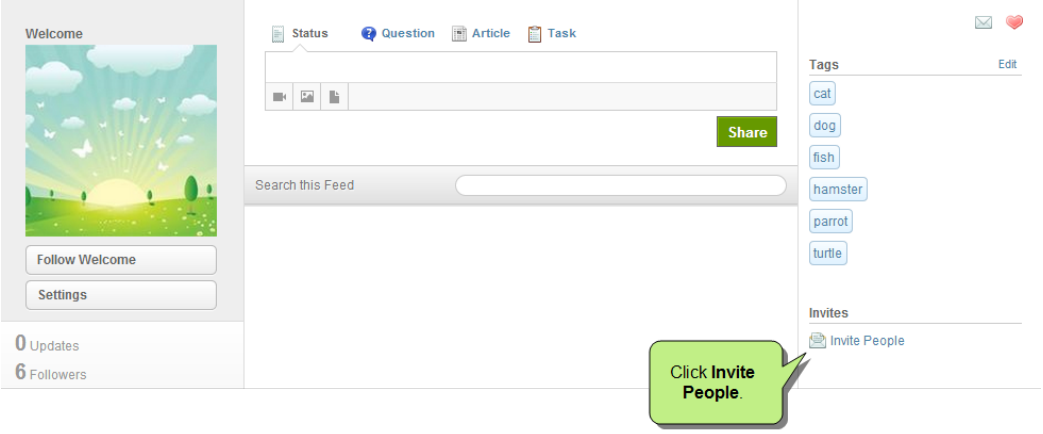
Members of the Administrators or Employees group can send invitations to other Administrators and Employees to read, follow or subscribe to a specific topic, group, tag, or user.

Sending Invites

Use the following steps to send invites to people.

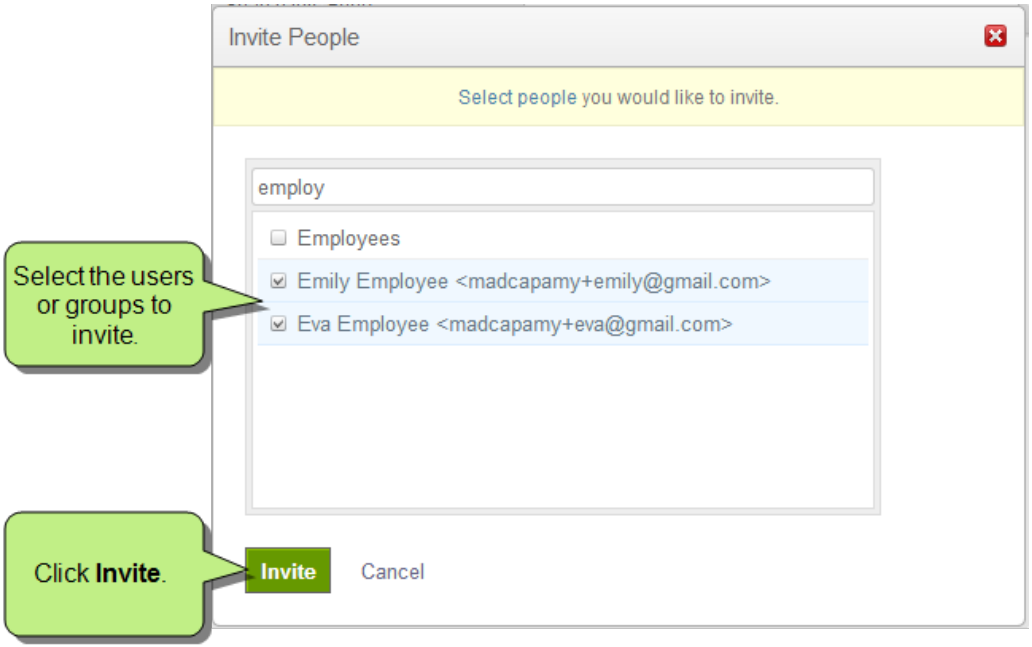
HOW TO SEND INVITES TO PEOPLE

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Navigate to a topic, group, tag, or user. Then click the **Invite People** link.



This opens the Invite People dialog.

3. In the Invite People dialog, type all or part of a user or group name. Then place a check mark next to the desired matches and click **Invite**.



The system sends an invitation to the designated recipients.

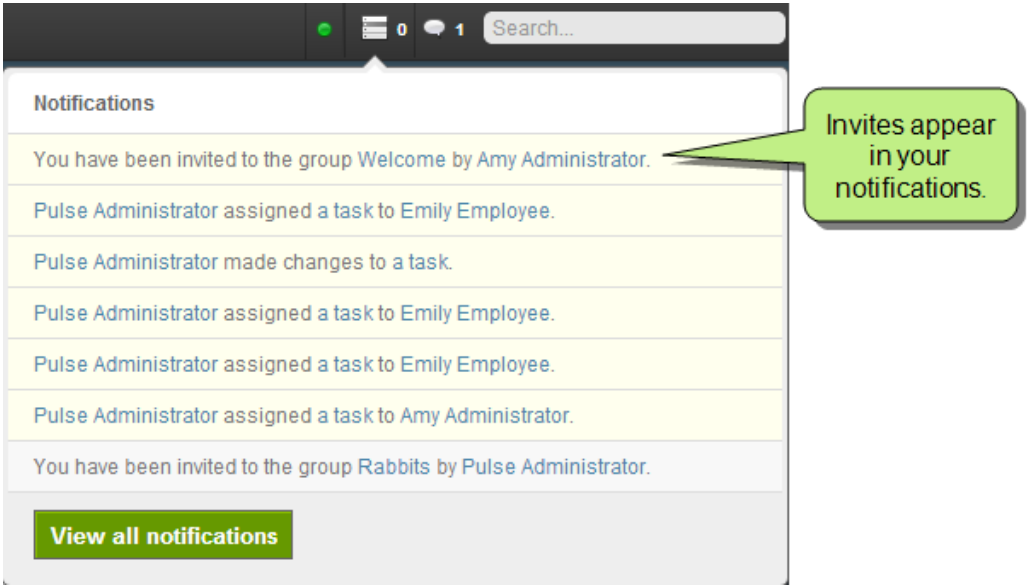
Responding to Invites

Use the following steps to respond to invites.

HOW TO RESPOND TO INVITES

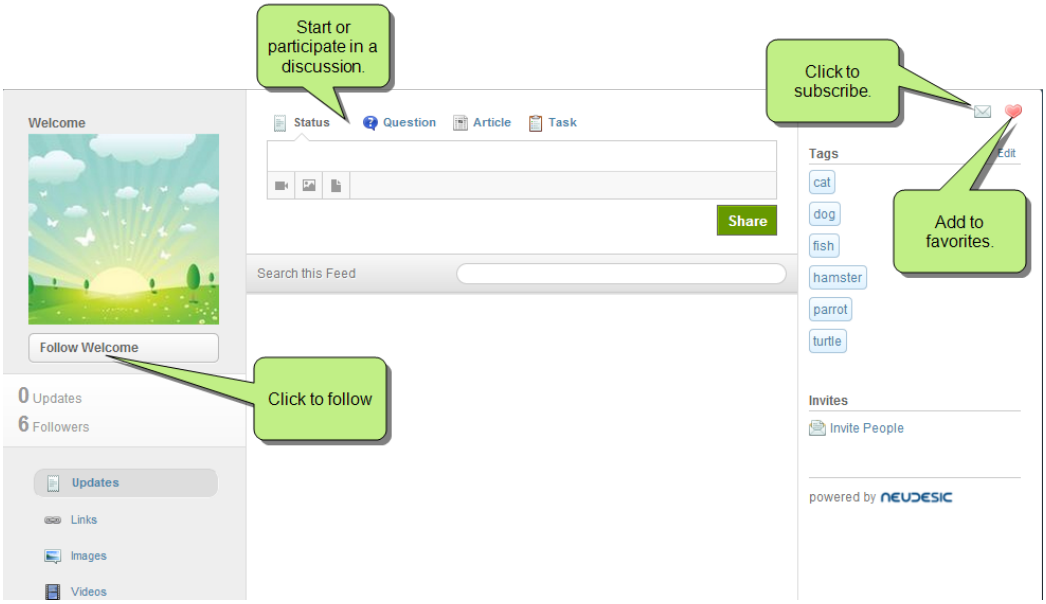
You can invite registered users to follow a topic, group, tag, or user.

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Check your notifications for invites. See "Notifications" on page 324.



3. Click the invitation.

   In this example, the user was invited to join the group for the Welcome topic, as shown below. You can then perform a variety of different tasks.



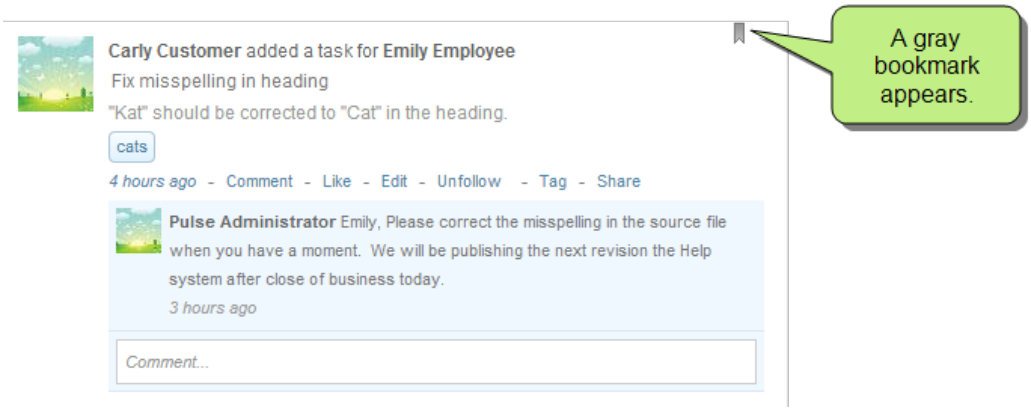
Bookmarking a Post to Read it Later

This feature is available to members of the **Administrators** and **Employees** group.

The "Read it Later" feature let's you bookmark status updates, questions, articles, and tasks so you can read the information more closely at a later time.

HOW TO ADD A POST TO YOUR READ IT LATER PAGE

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Navigate to a topic, user, group, or tag feed.
3. Hover over the upper-right corner of any post in the discussion form. A gray bookmark appears.



4. Click the gray bookmark so it turns blue. A blue bookmark indicates the post has been added to your Read it Later page.

Note: You can repeat this step for as many different posts as you want.

Note: To remove a post from the Read it Later page, click the blue bookmark so it turns gray.

Responding to Status Updates

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

When a registered user posts a new status update, you have several options if you choose to respond to the post.

The list below describes each available response. An asterisk (*) denotes that the option is only available to members of the Administrators and Employees group:

- **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 310.
- **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 313.
- **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity (see "Following Community Activities" on page 381). When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.
- **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 314.
- ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and the choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on page 400.

Responding to Questions

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

When a registered user posts a question, you have several options if you choose to answer it.

The list below describes each available response. An asterisk (*) denotes that the option is only available to members of the Administrators and Employees group:

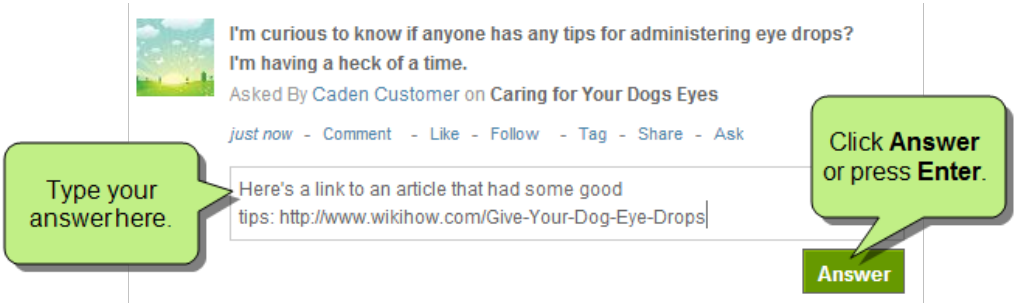
- **Answer the Question** Type an answer in the Answer field and press **Enter** to post it. See below.
- ***Ask a Specific User for an Answer** Click **Ask** to open the Ask dialog. This lets you solicit a response to the post from the people you select. See below.
- **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 310.
- **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 313.
- **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity (see "Following Community Activities" on page 381). When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.
- **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 314.
- ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and the choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on page 400.

Answering Questions

Use the following steps to answer a question.

HOW TO ANSWER A QUESTION

1. Navigate to any Flare topic where a question has been posted.
2. In the **Answer** field, type your response. Then click **Answer** or press **Enter**.

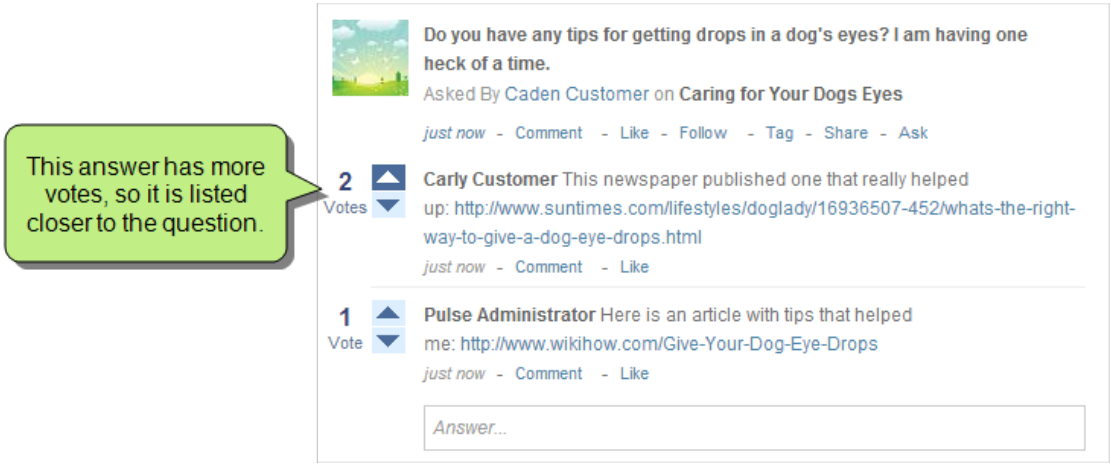


Voting for Answers

All registered users have the ability to vote for answers in the Flare output and Pulse dashboard. If you want to vote for an answer, you have these options:

- **Vote Up** Click the up arrow to vote in favor of the given answer.
- **Vote Down** Click the down arrow to vote against the given answer.

The more votes an answer receives, the higher it moves up in the display order. The answer with the most votes is listed closest to the question.



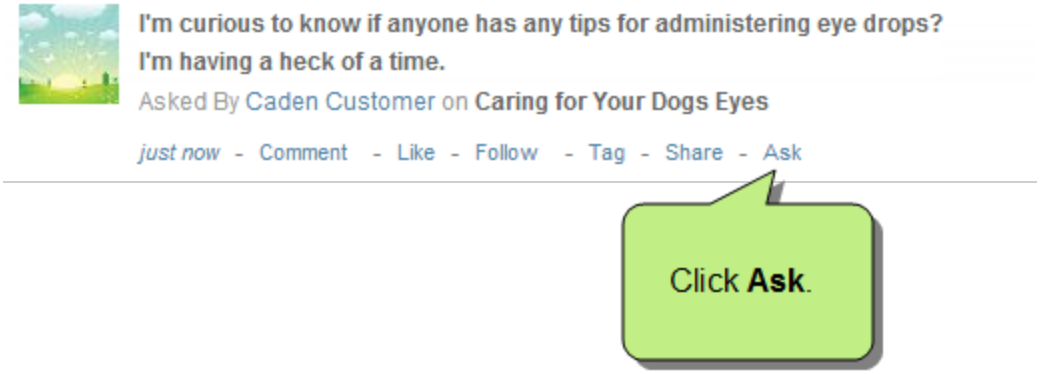
If a user decides to add one or more tags to the question, voting on an answer will add weight to the Pulse user's expertise rating. See "Finding Experts" on page 379.

Asking Users or Groups for Answers

If you are a member of the Administrators or Employees group and know of a particular individual (or Pulse group) that might have an answer to the question, you can solicit their input using the Ask option.

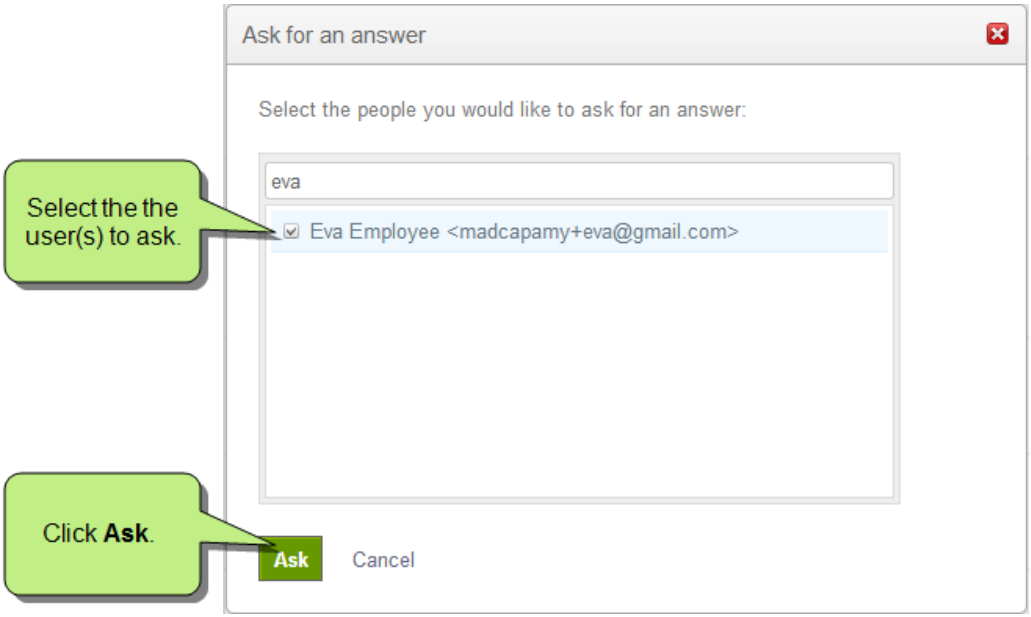
HOW TO ASK A SPECIFIC USER OR GROUP FOR AN ANSWER

1. Navigate to any Flare topic where a question has been posted.
2. In the question area, click the **Ask** link.



The Ask for an Answer dialog appears.

3. In the **Select the people you would like to ask for an answer** box, type a full or partial name or email address. Place a check mark next to the users (or groups) to ask.



4. In the dialog, click the **Ask** button.

   Pulse notifies the selected people. The user will be notified then next time he or she logs in to the Pulse dashboard.

> **Note:** To receive the notification message by email, the user must enable the appropriate feature in the Notifications tab on the Settings page of their profile. See "Editing Your Profile" on page 293.

Responding to Articles

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

When a registered user posts a new article, you have several options if you choose to respond.

The list below describes each available response. An asterisk (*) denotes that the option is only available to members of the Administrators and Employees group:

- **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 310.
- **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 313.
- **Edit the Post** Click **Edit**. Then make any changes. This option is only available when you author the post.
- **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity. See "Following Community Activities" on page 381. When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.
- **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 314.

» ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and the choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on page 400.

Responding to Tasks

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

All registered users can respond to task assignments posted in the topic feeds associated with a Pulse system (i.e., the embedded discussions forms that appear at the bottom of each topic in the Flare output).

If you have not been assigned a task, the list below describes each available response that is available. Members of the Customers and Employees group can edit tasks, with the exception of the Tags field. When tasks are changed, Pulse sends a notification to the task owner.

- **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 310.
- **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 313.
- **Edit the Post** Click **Edit**. Then make any changes. This option is only available when you author the post.
- **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity. See "Following Community Activities" on page 381. When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.
- **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 314.
- ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and the choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on the next page.

Note: If you have been assigned a task and you are a member of the Administrators or Employees group, you also have a number of task management options. See "Tasks" on page 369.

Sharing Posts

This feature is available to members of the **Administrators** and **Employees** group.

You can share Pulse posts on your own feed, on someone else's feed, and in a group.

HOW TO SHARE A POST

1. Immediately below a post, click the **Share** link.

   This opens the Share Activity dialog.

2. In the Share Activity dialog, type a message in the **Message** field.
3. In the **Share** list, select one of these options:
   - **On your own feed** This lets you share the article on your feed.
   - **On someone else's feed** This lets you share the article on the feeds of the registered users you specify. If you select this option, type the user name(s) in the **People** field.
   - **In a group** This lets you share the article in a group feed. If you select this option, type the group name(s) in the **Group** field.
4. Click **OK**.

Subscribing to Feeds

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

If you want Pulse to notify you about the Pulse activity associated with a Flare topic, you must subscribe to the desired feed (s). You can also subscribe to feeds that are associated with groups, tags, and users.

Depending on your access permissions, you can subscribe to different Pulse feeds.

HOW TO SUBSCRIBE TO A FEED

1. Log in to the Pulse from the Flare output or using the Pulse dashboard. See "Logging In to Pulse" on page 288.
2. Navigate to the desired Flare topic feed, user feed, group feed, or tag feed. Then click .You have these options:

   HOW TO SUBSCRIBE TO A FEED FROM THE FLARE OUTPUT

   The table below describes your subscription options in the Flare output.

Feed Type	Instructions
System Feed	Navigate to a Flare topic.
User Feed	Click a user name to reveal the user's feed.
Group Feed	Click a group name to reveal the group's page.
Tag Feed	Click a tag to reveal the tag's page.

   HOW TO SUBSCRIBE TO A FEED FROM THE PULSE DASHBOARD

   The table below describes your subscription options in the Pulse dashboard.

Feed Type	Instructions
System Feed	Navigate to a Flare topic.
User Feed	Click a user name to reveal the user's feed.
Group Feed	Click a group name to reveal the group's page.
Tag Feed	Click a tag to reveal the tag's page.

Important: If you want to be notified when Pulse users post updates, questions, and articles, and topics in the embedded discussion for specific a Flare topic), you must subscribe to the topic feed. *This is a particularly important task for administrators and employees who are responsible for moderating the end user activity for your published Flare content, as its the only way you will be notified about user activity.*

Note: If your user account does not have an appropriate level of access permissions, the system will reveal the message "You do not have permission to view the content you have requested."

Note: Once subscribed to a feed, the Pulse system will issue a notification where there is any activity. You can change your notification settings to suit your preference, see "Editing Your Profile" on page 293.

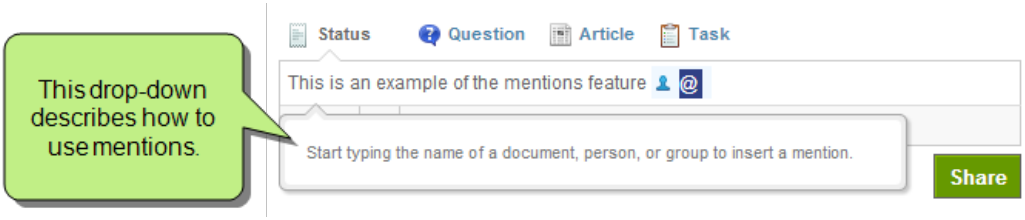
Using Mentions

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

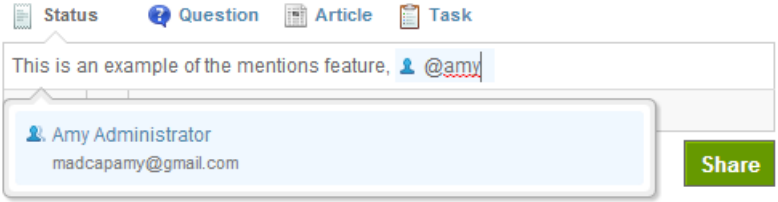
You can use the Mentions feature to mention other registered users by name when posting status updates or creating articles. Like many popular social media sites, this feature lets you type the at (@) sign and then a user name to mention a user in your update.

HOW TO MENTION OTHERS IN STATUS UPDATES AND ARTICLES

1. Navigate to the desired topic.
2. Start posting a status update or an article. See "Posting Status Updates" on page 297 and "Posting Articles" on page 305.
3. When you want to mention another registered user, type the at (@) sign. This reveals a drop-down that describes how to use the mentions feature.



4. Begin typing letters that match the user you want to mention. When a match is found, select it in the drop-down list.



5. Finish typing the status update or article. Then click **Share**. The post is added and Pulse sends notifications to the people(s) you mentioned.

Working With Favorites

This feature is available to members of the **Administrators** and **Employees** group.

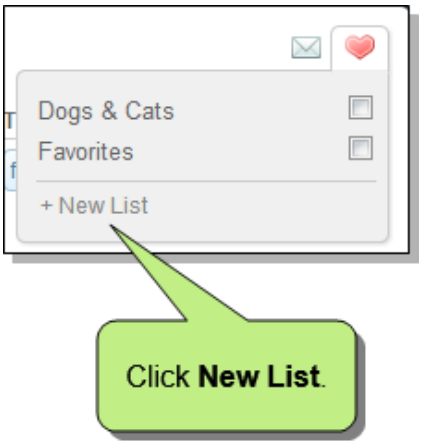
Pulse allows you to add group, tag, and topic feeds to a list of favorites. In addition, you can create more than one favorites list to help you organize information.The Favorites feature is available both the Flare output and Pulse dashboard.

Creating a Favorites List

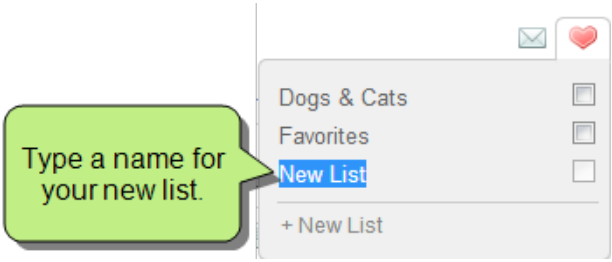
Use the following steps to create a favorites list.

HOW TO CREATE A FAVORITES LIST

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Navigate to the desired group, tag, or topic feed.
3. In the top right corner of the feed, click . Then click **New List**.



4. In the space provided, type a name for your new list and press **Enter**.

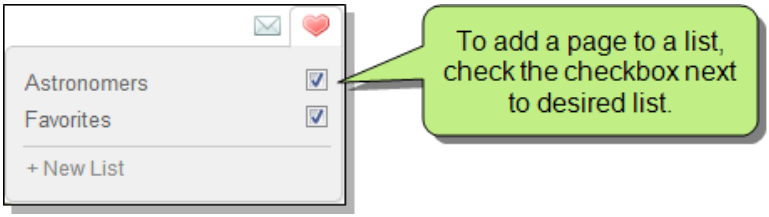


Adding a Feed to Your Favorites

Use the following steps to add a feed to your favorites.

HOW TO ADD A FEED TO YOUR FAVORITES

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Navigate to the desired group, tag, or topic feed.
3. In the top right corner of the feed, click . Then place a check mark in the desired favorites list.



Deleting a Favorites List

Use the following steps to delete a favorites list.

HOW TO DELETE A FAVORITES LIST

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 288.
2. Depending on which tool you are using, do the following:
   - If you are logged into the Flare output, click the **Community** tab.

     OR
   - If you are logged into the Pulse dashboard, choose **Pulse>Home**.
3. In the left pane, locate the **Lists** area and highlight the list you want to remove.
4. Click .
5. In the Delete Favorites dialog, click **OK**.

> **Note:** You cannot delete the default list named "Favorites."

Searching for Community Results

This feature is available to the following types of Pulse users: **Administrators**, **Employees**, and **Customers**.

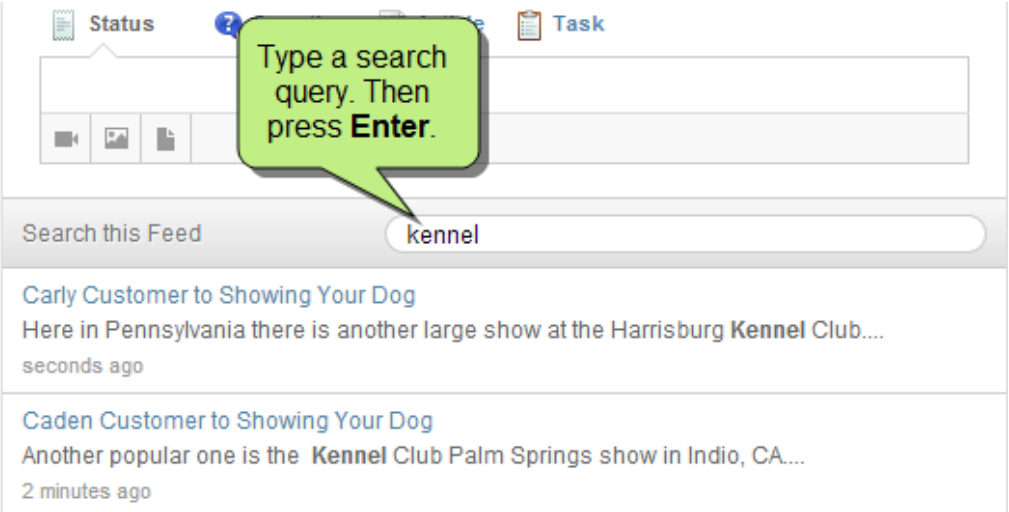
When integrating a Pulse system with a Flare community, you have two different search options. You can search a feed in Pulse or, if you enable the feature, you can extend the scope of a Flare search to include the Flare community results stored in Pulse.

Searching a Pulse Feed

In the Flare output, users can search a Pulse feed for matches. With this method of search, the scope of the search is limited to the active topic feed.

HOW TO SEARCH A PULSE FEED

1. Log into the Flare output or Pulse dashboard using a registered Pulse account.
2. In the embedded discussion form, type a search query in the **Search this Feed** box.
3. Press **Enter**. This searches only the active feed.



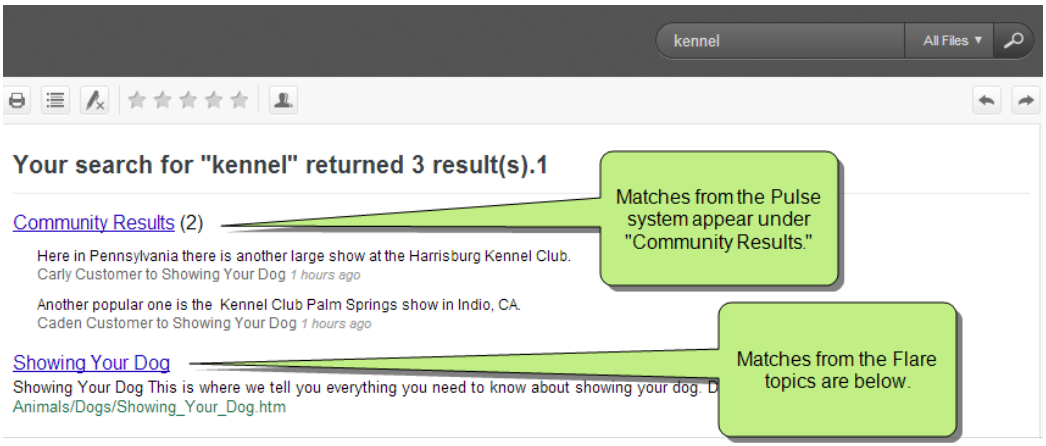
Searching the Flare Output for Community Results

If you enable the display of community search results in the Flare skin (i.e., select **Display community search results**), the scope of a Flare search can be extended to include matching community activity from Pulse.

HOW TO SEARCH THE FLARE OUTPUT FOR COMMUNITY RESULTS

1. Log into the Flare output using a registered Pulse account.
2. In the search entry field associated with the Flare output, type your search query and then press **Enter**.

3. In the search results page, any posts containing your search terms appears under a heading titled "Community Results." Any matching Pulse activity is listed beneath the heading.



APPENDIX

PDF Guides

The following PDF guides are available for download from the online Help.

Accessibility Guide
Analyzer Guide
Autonumbers Guide
Condition Tags Guide
Context-sensitive Help Guide
DotNet Help Guide
Eclipse Help Guide
Getting Started Guide
Global Project Linking Guide
HTML Help Guide
HTML5 Guide
Images Guide
Importing Guide
Index Guide
Key Features Guide
Language Support Guide
Movies Guide
Navigation Links Guide
Print-based Output Guide
Project Creation Guide
Pulse Guide
QR Codes Guide
Reports Guide
Reviews & Contributions Guide
Search Guide
SharePoint Guide
Shortcuts Guide
Skins Guide

Snippets Guide

Source Control Guide

Styles Guide

Tables Guide

Tables of Contents Guide

Targets Guide

Templates Guide

Topics Guide

Touring the Workspace Guide

Transition From FrameMaker Guide

Variables Guide

WebHelp Outputs Guide

What's New Guide