

MadCap Pulse

# User Guide

Version 1.0



THIS USER GUIDE WAS CREATED USING MADCAP FLARE

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# CHAPTER 1 Introduction

This feature is supported in WebHelp and WebHelp 2.0 (HTML5) output.

Pulse is a documentation-centric social collaboration platform that enables you to connect, collaborate, and share knowledge with fellow authors, employees, and customers. 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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## Setting It Up

Following are general steps describing how to set up Pulse and integrate it with your output.

1. **Install MadCap Pulse Server** Provide your system administrator with the instructions for installing the software and other components on your hardware, which is used to host the Pulse data. The system administrator uses the wizard in the Pulse Server Admin to select the website, choose the SQL Server instance to use, select features, configure the server, configure the database, configure SMTP settings, and select a new password. The system administrator can also perform maintenance tasks. The Flare output files can be hosted on the same server hosting the Pulse data, but it is not mandatory; the output files can be published anywhere you like.
2. **Make yourself an administrator** After the Pulse server is installed, there is just one administrator for it, with the username and password that were created during the installation and configuration process. One of the first things you may want to do is add yourself and perhaps others as administrators. You can do this and perform other administrator tasks by opening a browser and navigating to the URL where the Pulse server is installed.



**Note:** Administrators cannot delete themselves as administrators. However, other administrators can delete one another as administrators.

3. **Enable Pulse and create/select communities** To integrate Pulse with your Flare output, you need to enable the Pulse functionality in a Flare target. You also need to create or select a community for the target. A community is simply the entity for a collection of Pulse data. You can perform these tasks on the Community tab in the Target Editor.



**Note:** It is possible to use the same Pulse community for different targets. However, you must keep in mind that the statistics for the various targets will then become merged when you view them. You will not be able to determine which statistics resulted from which targets.

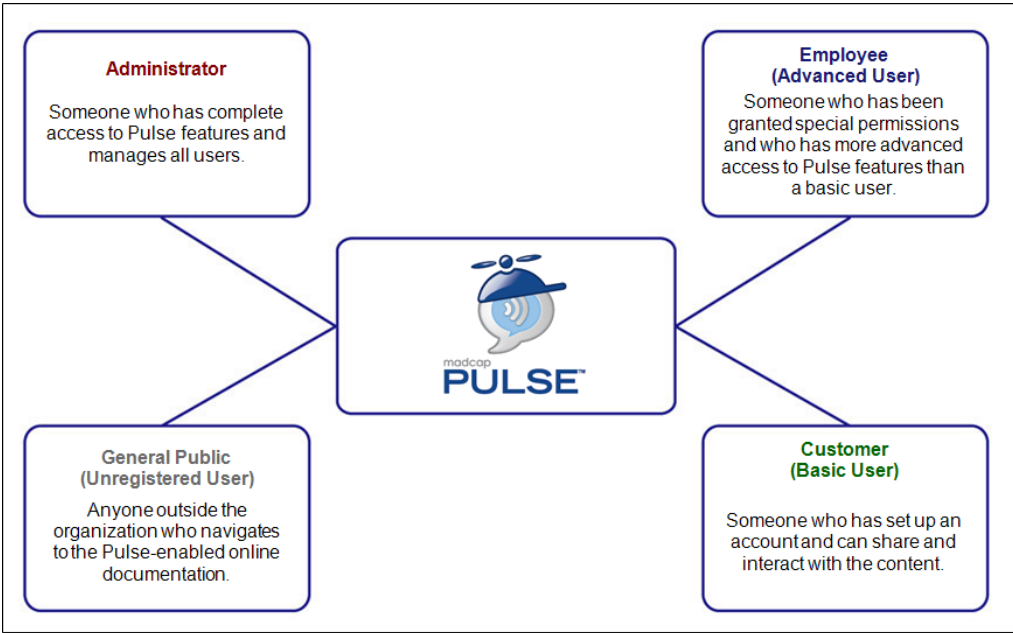


**Note:** If you made yourself an administrator, you can use your login information in the Flare target, as opposed to using the default administrator login.

4. **(Optional) Display comments at end of topics** If you want end users to be able to enter comments on topics, you need to make sure comments are enabled (which is the default setting). The option can be found on the Community tab. Select **Display topic comments at the end of each topic**.
5. **(Optional) Display community search results** You can specify in a skin whether community search results should be merged with search results in your output. You can do this by opening the Skin Editor's Community tab and selecting **Display community search results**.

## Types of Users

Pulse allows 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.

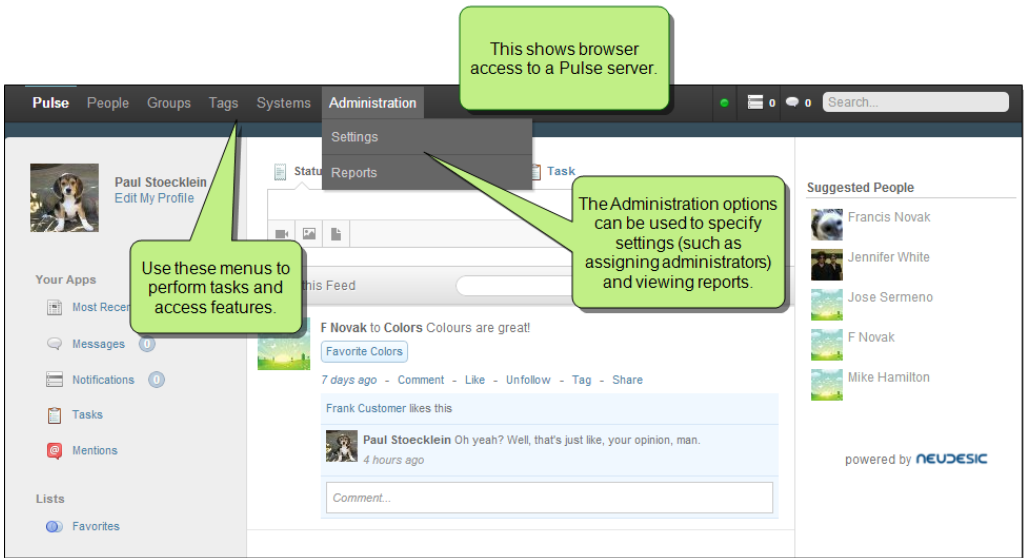
Different types of users have certain levels of access to Pulse features and activities.

MadCap Pulse User Activities	General Public (Unregistered)	Customer (Basic User)	Employee (Advanced User)	Administrator
Read comments	✓	✓	✓	✓
Search comments	✓	✓	✓	✓
See ratings/interactions	✓	✓	✓	✓
Rate topics	✓	✓	✓	✓
Create profile and set notification preferences		✓	✓	✓
Post statuses, questions, and articles		✓	✓	✓
Comment, like, follow, and tag user content		✓	✓	✓
Upload files, photos, and videos		✓	✓	✓
Subscribe to topics		✓	✓	✓
Delete and edit their own content		✓	✓	✓
Access to "Your Apps" in Community tab			✓	✓
Assign tasks			✓	✓
Mention and message other users			✓	✓
Designate topics as "favorites"			✓	✓

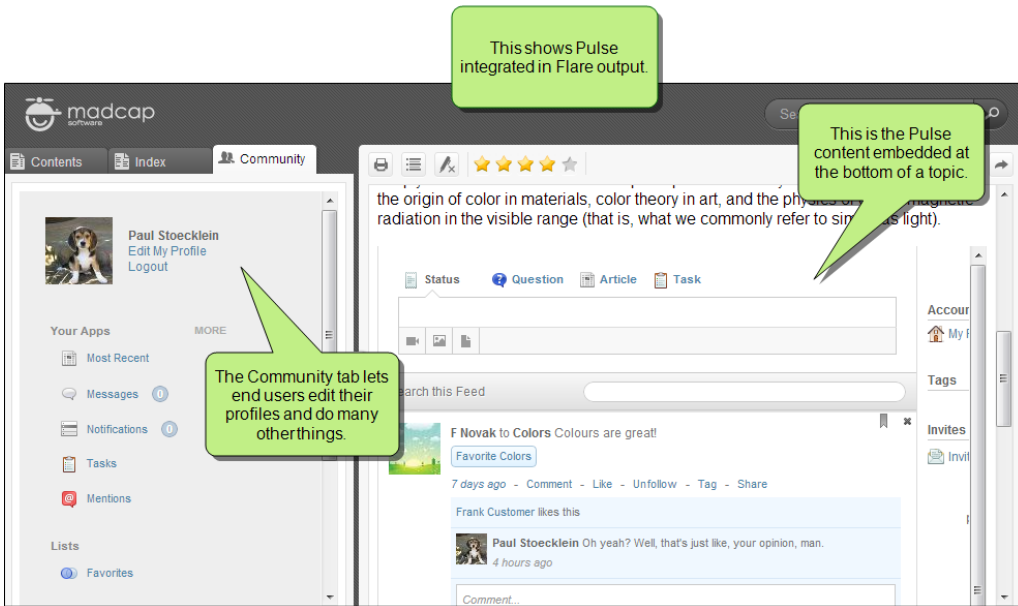
MadCap Pulse User Activities	General Public (Unregistered)	Customer (Basic User)	Employee (Advanced User)	Administrator
Like/dislike/vote on answers to questions			✓	✓
Filter and view files, images, video, and other content in comments			✓	✓
Access groups			✓	✓
Delete content added by other users				✓
Access server settings				✓
Access reports				✓

## Pulse Browser Access Versus Flare Output

After the Pulse server is installed, you can access features and settings from a regular browser. In the browser, simply type the URL where Pulse was installed and use the menus provided on the page. This is where you perform tasks such as assigning people to one of the different user types and viewing data reports.



After Pulse is integrated with Flare, you and other users can view information and perform certain tasks via the Community tab or the news feed in the output. This includes the ability to edit your profile and choose email notifications for particular events.



So the browser access is different from the Flare output access, but some of the same information can be found in both places.

## How Others Become Part of a Community

There are a few ways that someone can become part of your community.

### *YOU INVITE OTHERS*

As an administrator, you can invite someone to be a new user in your community. When you do this, you can assign that user to one of the levels—Administrator, Employee, or Customer. These three groups already exist. You can add other groups and name them what you want, but they must be associated with one of the three levels just mentioned.

1. In a browser, enter the path to your Pulse server and log in.
2. Select the **Administration** menu and click **Settings**.
3. Click **Users**.
4. At the bottom, click **Invite a User**.
5. Complete at least the name and email fields.
6. Toward the bottom in the **Group** section, select the level you want to assign to the new user—**Administrators**, **Employees**, or **Customers**.
7. Click **Send Invite**.

### *OTHERS REGISTER THEMSELVES*

Someone viewing your Flare output that has been enabled with Pulse will see the feed at the bottom of your topics. If that person is not yet a member of the community, he or she is considered part of the General Public. Next to the feed, this person sees a link to Login.

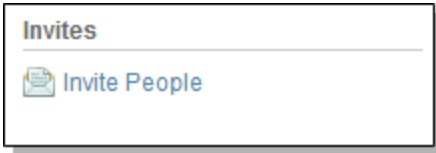


After clicking **Login**, a popup opens. The user can then click **Register** and complete the fields.

When someone registers like this, they join the community at the level of Customer. However, you can always use the browser to upgrade that person to an Administrator or Employee.

### **REGISTERED USERS INVITE OTHERS**

A registered user in your community can click a link to the right of the feed to invite someone in the Pulse community to become a member of the community. This type of new user joins at the level of Customer initially. However, you can always use the browser to upgrade that person to an Administrator or Employee.



### **CHANGING A USER'S MEMBERSHIP LEVEL**

You can use the following steps to change someone's membership level.

1. In a browser, enter the path to your Pulse server and log in.
2. Select the **Administration** menu and click **Settings**.
3. Click **Groups**.
4. Type and select the group name you want to assign to the user—**Administrators**, **Employees**, or **Customers**.
5. Click **Manage Group**.
6. Select the **Membership** tab.
7. Begin typing the person's name and then select it from the list below so that it has a check mark next to it.
8. Click **Save**.

## Pulse at a Glance

Use the following to quickly start using Pulse. For more information, see "Pulse Features" on page 53.

### ***YOUR PROFILE/IMAGE***

Displays the image you provide via the "Edit My Profile" link. You are given a default image until you update your avatar.

### ***YOUR ACTIVITY***

Displays the numbers of updates, followers, and what you are following.

### ***SEARCH***

Use the Search bar on the top right of your screen to find anything with Pulse.

### ***SEARCH THIS FEED***

Use the Search This Feed feature to look up specific content within a news feed. The Search This Feed bar will begin target keywords from previous post as you are looking them up.

### ***SHARE YOUR THOUGHTS, LINKS, IMAGES, VIDEOS, FILES AND INSIGHT***

Use the Update Bar to contribute to your company. You can share images, videos, links, and documents with any post. Upload a document and tell people what it contains. It makes a huge difference and helps people quickly determine if they are interested.

### ***USING @***

For mentioning people, groups, or files in a post use the @ key and type the first few letters of the intended mention. Pulse will display a dropdown of people, groups, or files matching your criteria. Click the person, group or file name and they will be mentioned in your post.

### ***LIKING***

Give your colleagues some positive reinforcement by liking their post. The like button can be found under every post.

### ***COMMENTING***

Add your perspective to the conversation. Commenting on posts allows you to get your voice out there, provide feedback and avoid long email threads.

### ***FOLLOWING A POST***

Every time you contribute to a post, whether it be a comment, like, share, or tag, you will begin to automatically follow the post. This allows you to stay informed with the conversation that goes on after you contribute. If you wish to unfollow a post just click the unfollow button found below the post.

### **SHARING FILES AND MEDIA**

Sharing files and media (such as videos and images) can be done with a few clicks. Under the Update bar you will find icons for sharing files, images and videos. Click your desired icon to upload a file from your hard drive.

### **SUGGESTIONS**

This section provides people that you might want to follow. The more people you follow, the more insight you'll have.

### **UNIFIED ACTIVITY STREAM**

This section displays the updates from people, groups, tags, and systems you follow.



**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.



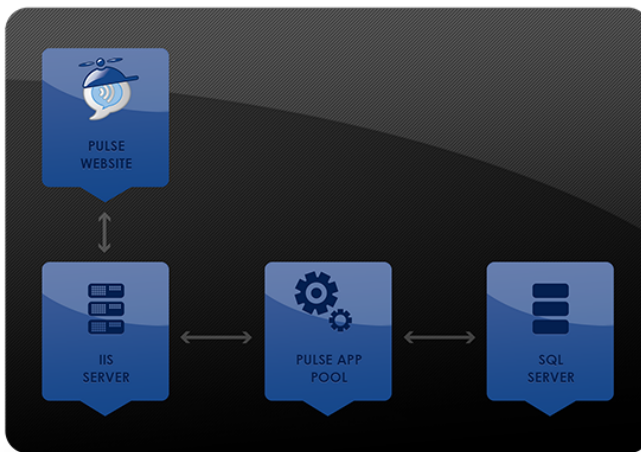
**Note:** MadCap Pulse is an optional feature in Flare that is sold separately.

# CHAPTER 2 Installing MadCap Pulse Server

If you purchase the Pulse server component, you need to install the Pulse Server Admin on the Microsoft Windows machine that will be used to host your Pulse data. Provide the individual who is responsible for the installation with these instructions.

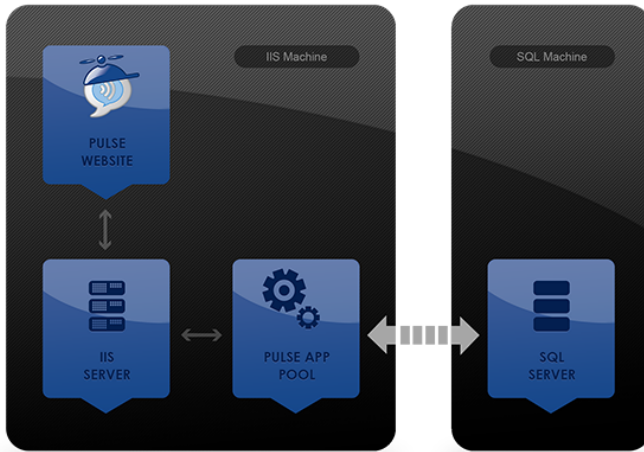
The following graphics describe the how Pulse works with the IIS server and the SQL server when they are on either one machine or two.

**1 MACHINE**  
User needs Admin access to this machine



**2 MACHINES**

User needs Admin access to IIS Machine  
User needs sysAdmin rights to SQL Database



## Requirements

- Windows operating system (the following are recommended)
  - Microsoft Windows Server 2008
  - Microsoft Windows Server 2008 R2
- Microsoft .NET Framework 3.5.1 *and* 4.0
- SQL Server (the following are recommended)
  - SQL Server 2008 Standard
  - SQL Server 2008 R2



**Note:** You can also use SQL Server 2008 Express with Advanced Services, which can be downloaded from [msdn.microsoft.com](http://msdn.microsoft.com). However, SQL Server 2008 Standard, SQL Server 2008 R2, are recommended instead. If you decide to use SQL Server 2008 Express, it is important that you use SQL Server 2008 Express *with Advanced Services*, because this version includes **Full-Text Search**, which is a feature Pulse requires in order to function.

- Microsoft Internet Information Services (IIS) 7
- ASP.NET 4.0
- MadCap Pulse Server Admin

## How to Install Pulse Server and Other Components

On the same machine to be used for hosting Pulse, complete the following steps.

1. Make sure that both Microsoft .NET Framework 3.5.1 *and* 4.0 are installed.



**Note:** You can download .NET Framework 3.5.1 from Microsoft. After installing it, a Windows update should allow you to also install 4.0.

2. Make sure that a supported version of SQL Server is installed. See one of the following topics for installation information regarding your version of SQL Server.
  - "SQL Server 2008 " on page 38
  - "Installing SQL Server 2008 Express with Advanced Services" on page 40
  - "SQL Server 2008 R2 " on page 44
  - "SQL Server 2008 R2 Express" on page 42



**Note:** Make sure whichever version of SQL Server you use has the **Full-Text Search** feature enabled, as Pulse needs this in order to function.

3. Make sure that Microsoft IIS 7 is installed. If it is not, use the following steps.
  - a. Open the **Start** menu.
  - b. Right-click **Computer** and from the context menu, select **Manage**. The Computer Management window opens.
  - c. On the left side of the Computer Management window, select **Roles**.
  - d. On the right side of the Computer Management window, click **Add roles**. The Add Roles Wizard Opens.
  - e. On the first page of the Add Roles Wizard, click **Next**.
  - f. Click the check box next to **Web Server (IIS)**.
  - g. Click **Next**.
  - h. Click **Next** again.

- i. On the Select Role Services page of the wizard, expand **Application Development** and select **ASP.NET**.
- j. Expand **Management Tools>IIS Management Compatibility** and click **IIS Metabase Compatibility**.
- k. In the dialog that opens click **Add Required Role Services**.
- l. (Optional) If you want to be able to manage IIS from a remote machine, you can expand **Management Tools** and select **IIS Management Service**.
- m. Expand **Security** and select **Basic Authentication** and **Windows Authentication**.
- n. Click **Next**.
- o. On the Confirm Installation Selections page of the wizard, click **Install**.
- p. After the installation is completed, click **Close**.

4. Install the Pulse Server Admin application from the link you received.

This installation will involve completing the license agreement, selecting installation folder, and confirming the install.


5. After installation is complete, launch the application. In order to run the application, you will need to run MadCap Pulse as an administrator. If you are not set as an administrator, right-click the **Pulse.exe** file, and from the context menu, and select **Run as administrator**. (If the Run as administrator option does not show in the right-click menu, hold left SHIFT key as you right-click, and the menu will display the option.) The MadCap Pulse Configuration Wizard opens.



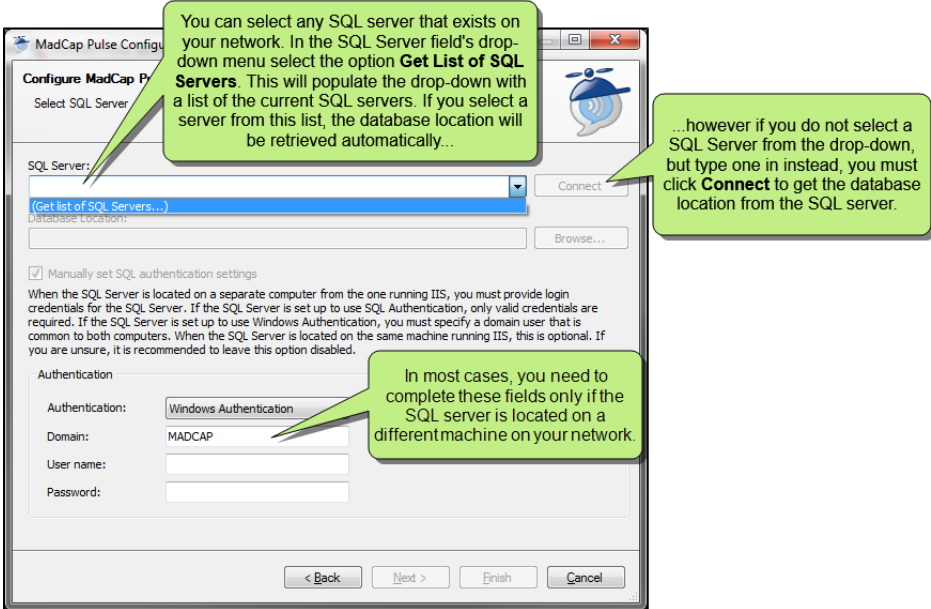
**Note:** If you did not perform one of the above steps, a dialog shows what is not yet installed (by displaying it in red text). If necessary, you can install ASP.NET from the dialog by clicking the button to the right of the red text.

6. In the MadCap Pulse Configuration Wizard, click **Next**.

- 7. Select the IIS website where you want the Pulse Server installed. If you have not set up a specific website for this purpose, use the default.

 **Note:** This is an administrative preference. Your server (IIS) might be serving several websites and you need one to store the Pulse data. This drop-down simply lets you pick the website that you want to use.

- 8. In the **Pulse Server Url**, field, select a website to which you want to map MadCap Pulse.
- 9. Click **Next**.
- 10. Click the down arrow in the **SQL Server** field and select **Get List of SQL Servers**. If you select a server from this list, the database location will be retrieved automatically. If the SQL instance that you would like to use does not appear in the list, you can type the IP address or the name of the machine. If you do type IP Address or the name of the machine instead of selecting one from the drop-down , the database location will not be retrieved automatically. Click **Connect** to retrieve the database location from the server.



The screenshot shows the 'Configure MadCap Pulse' dialog box. The 'SQL Server' field has a dropdown menu open with the option '(Get list of SQL Servers...)' selected. A callout bubble points to this dropdown, stating: 'You can select any SQL server that exists on your network. In the SQL Server field's drop-down menu select the option **Get List of SQL Servers**. This will populate the drop-down with a list of the current SQL servers. If you select a server from this list, the database location will be retrieved automatically...'. Another callout bubble points to the 'Connect' button, stating: '...however if you do not select a SQL Server from the drop-down, but type one in instead, you must click **Connect** to get the database location from the SQL server.' A third callout bubble points to the authentication fields, stating: 'In most cases, you need to complete these fields only if the SQL server is located on a different machine on your network.' The dialog box also includes a 'Database Location' field with a 'Browse...' button, a checked checkbox for 'Manually set SQL authentication settings', and a detailed text block explaining authentication requirements. At the bottom, there are buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.



**Note:** If you are connecting to an SQL Server on another machine, you must make sure that the machine running IIS and the machine running SQL Server are on the same domain. To verify this, you can right-click **My Computer**, then select **Properties**, then select the **Computer Name** tab.



**Note:** If your SQL instance does not appear in the SQL Server field, you may need to turn on the SQL Server Browser or manually type in the computer name/SQL Server instance name. To turn on the SQL Server Browser, do this: (1) Open the SQL Configuration manager; (2) select **SQL Server Services** in the left pane; (3) right-click **SQL server browser** and select **Properties**; (4) on the **Service** tab, select start mode to **Automatic** and click **OK**; (5) right-click the **SQL Server Browser** again, and select **Start**.



**Note:** If you experience connectivity issues, you can try entering the IP address for the SQL Server directly instead of selecting it from the drop-down list. When you do this, you need to replace only the computer name portion with the IP address (i.e., the part before the backslash).

11. (Optional) You can select a location for the database other than the default location provided. To do this, next to the **Database Location** field, click the **Browse** button. Then find and select the folder where you want the database to be stored.



**Note:** The Database Location field is unavailable if you are using a remote SQL Server. The default data directory of the SQL Server will be used instead.

12. If the SQL Server is located on a machine different from the one where you are installing MadCap Pulse Server Admin, complete the authentication fields in the bottom part of the dialog. You might need to consult with your IT department to determine the user name and password. (This does not need to be the same user logged into the machine. This should be the designated "common user" for the Pulse Server communication to the SQL machine.)

What is meant by "common user"? When the SQL database is on the same machine as the Internet Information Services (IIS) and Pulse Server, Pulse Server will use a default anonymous login provided by Microsoft to communicate between the service and the database. The name of this default anonymous login varies between different versions of IIS. For example, in IIS 7 the login is "NT AUTHORITY\NETWORK SERVICE." When using SQL Server on a separate machine than the IIS machine, this anonymous user (which is defined on the IIS machine) would be denied access on the SQL machine. Therefore, a "common user" such as a domain user is needed for this back end communication. The "common user" can be any current domain user name or a specific user name set up for this purpose. If the SQL Server is on the same machine as the IIS machine, yet you require more control over the specific Windows user that is used to connect to the SQL Server from the Pulse Server, enable **Manually set SQL authentication settings**. This will allow you to specify a Windows user in the fields below.

In the first drop-down, select **Windows Authentication** or **SQL Server Authentication**. Your selection depends on the way you have SQL Server configured. If you want to let Windows manage the login, use Windows Authentication. If you want to work in mixed mode, use SQL Server Authentication.



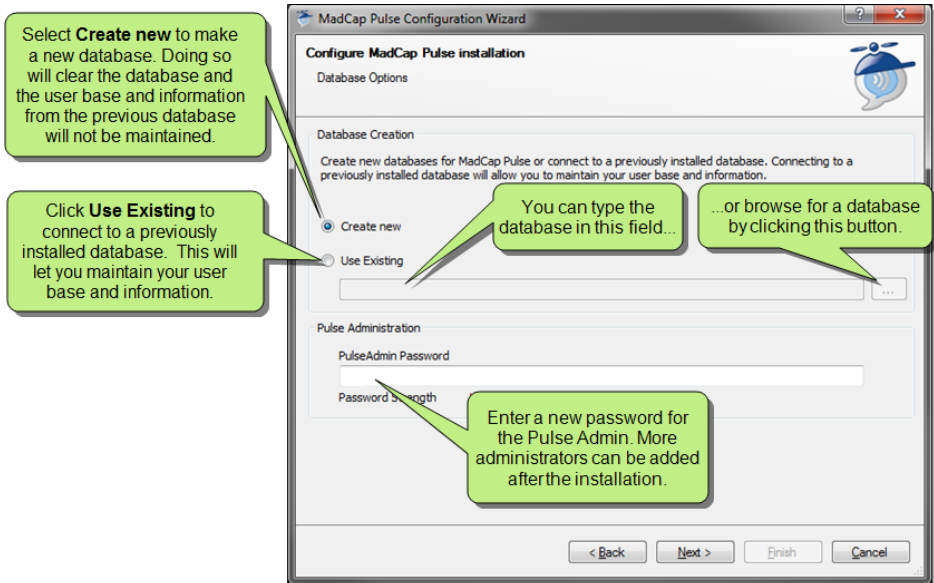
**Note:** If the SQL Server is located on the same machine as the Pulse Server Admin, completing these fields is optional.



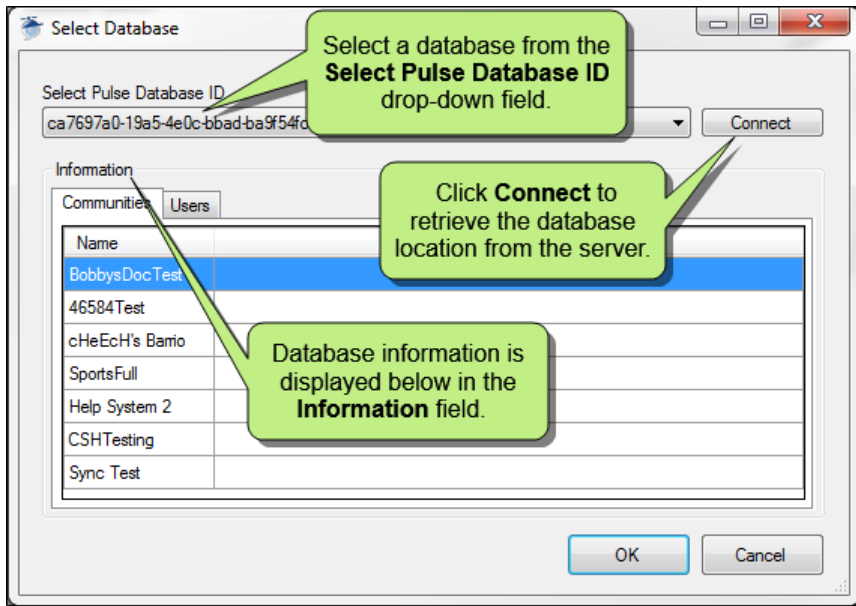
**Note:** If you complete these fields, it is recommended that you use a password that does not expire. However, if necessary, you can later change an expired password via the Control Panel. For steps, see "Changing Expired Passwords" on page 46.

13. Click **Next**. The Database Options page opens.

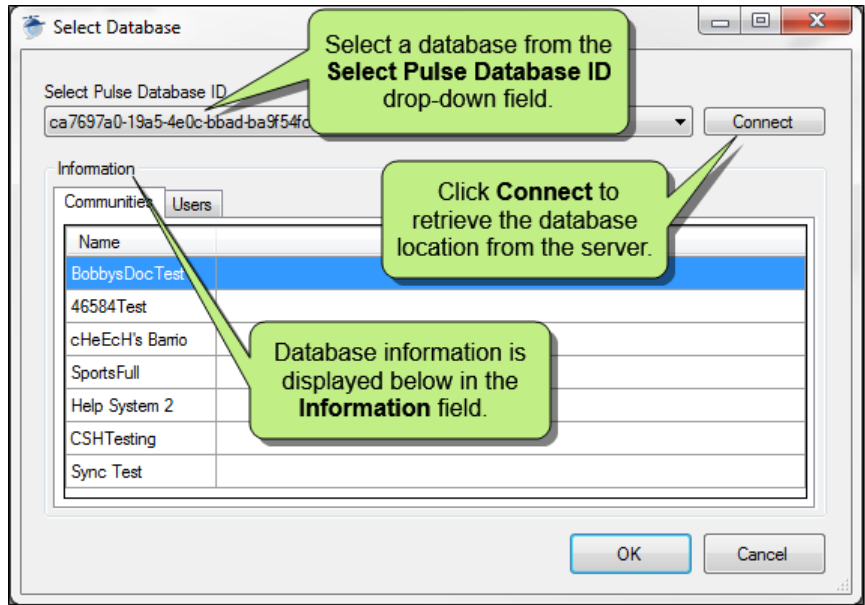
14. On the Database Options page, select whether you want to create a new database for Pulse or use an existing database.



- **Create new** This option creates a new database for Pulse. Creating a new database will not allow you to maintain the previously existing user base and information. This option is selected by default.
- **Use Existing** This option lets you enter an existing database. Using an existing database will allow you to maintain the user base and information that existed previously. Click the browse button to the right to open the **Select Database** dialog.



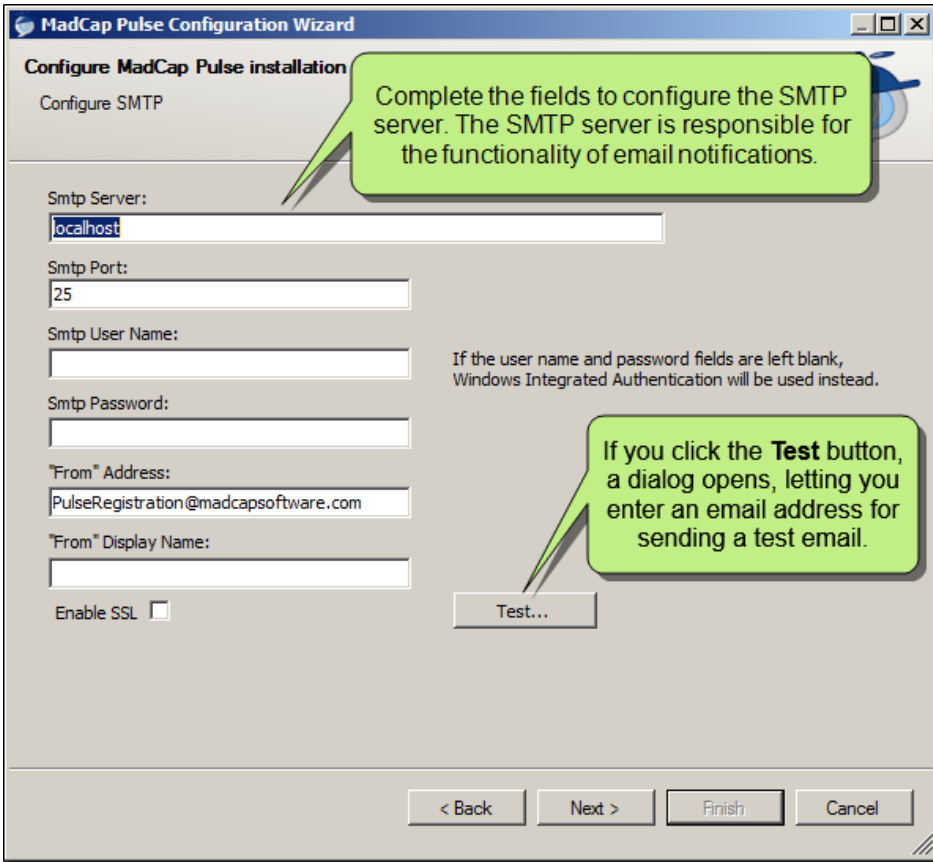
Select a database in the **Select Pulse Database ID** field and click **Connect** to retrieve its location.



The information about the database you select appears in the **Information** field.

15. Enter a new password for the Pulse administrator. When you are finished, this will initially be the only administrator in your Pulse system, but more administrators can be added. The password for the Pulse administrator can also be changed after the installation from the File menu in the Pulse Server Configuration window.
16. Click **Next**. The Configure SMTP server page opens.

- 17. On the Configure SMTP server page, you can select the SMTP server settings. The SMTP server is responsible for the functionality of email notifications.



- 18. In the **SMTP Server** field, enter the SMTP server name.
- 19. In the **SMTP Port** field, enter the port number. The default is 25.

20. In the **SMTP User Name** field, enter the SMTP user name.
21. In the **SMTP Password** field, enter a password.



**Note:** If you elect to use Windows Integrated Authentication, leave the user name and password fields blank. Otherwise, if your SMTP server requires specific credentials, specify them in the provided fields.

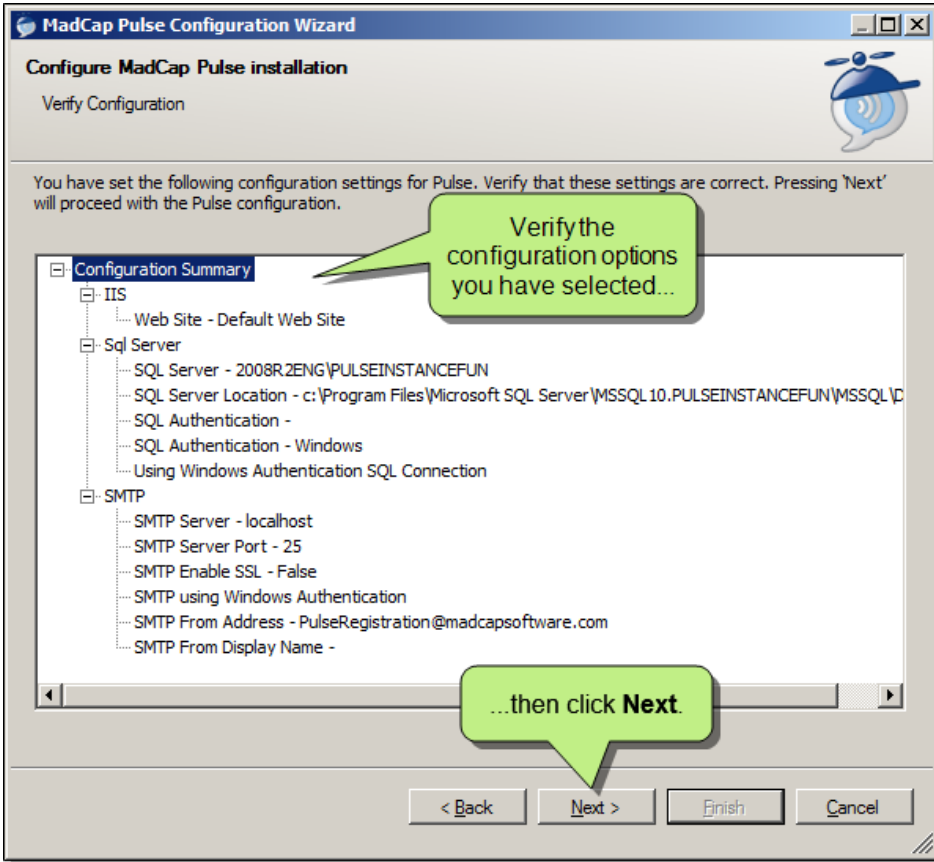
22. In the **"From" Address** field, enter a valid email address.
23. In the **"From" Display Name**, enter a display name.
24. In the **Enable SSL** field you can check the option to connect to an SMTP server as an SSL connection. In order to do this you must administrator rights and an exchange server to enable this option.



**Note:** It is highly recommended that you purchase an SSL certificate and install it on your Web server. MadCap Pulse uses encryption for certain processes, which helps to ensure that the data transfer is secure. If you have an SSL certificate installed on your Web server, make sure you begin the path to the server with `https://`.

25. (Optional) You can click the **Test** button on this page to make sure that the SQL Server, website, and SMTP Server are working. If you click the Test button, a dialog opens, letting you enter an email address for sending a test email.

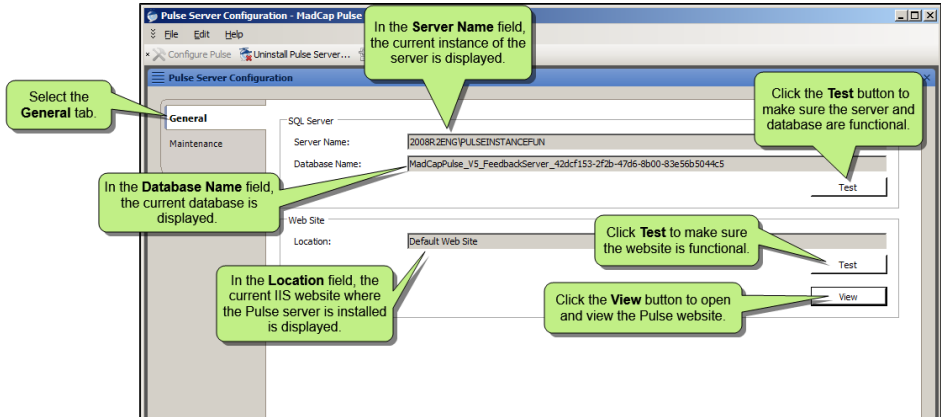
- 26. Click **Next**.
- 27. Click **Next** to verify the Pulse configuration.



- 28. Click **Next**. The installation will begin.
- 29. Click **Finish**.

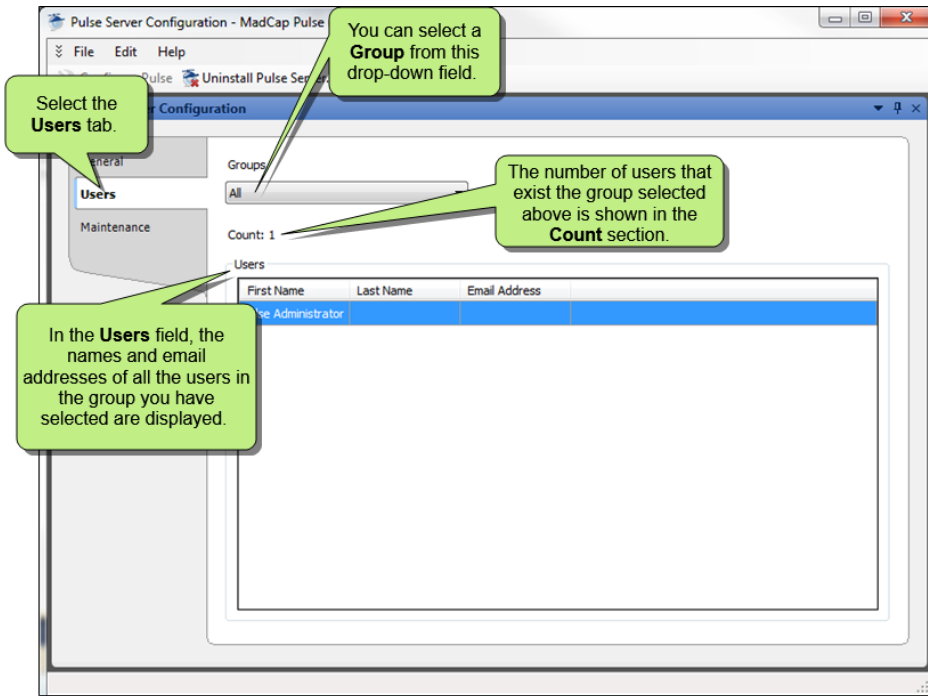
The installation is complete and the Pulse Server Configuration window opens with multiple tabs shown. You can use these tabs to configure the admin and set up maintenance tasks.

30. (Optional) Click the **General** tab. On the General tab you can do the following.

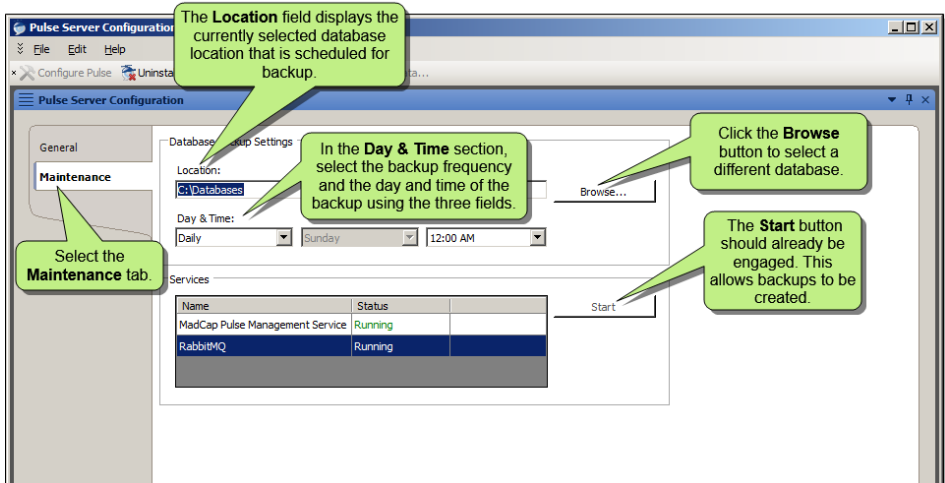


- **View the server and database names** In the **SQL Server** section, you can view the SQL Server name and the database name.
- **Test the server and database** In the **SQL Server** section, you can click the **Test** button to make sure the server and database are functional.
- **View the website location** In the **Web Site** section, you can view the current IIS website where the Pulse server is installed.
- **Test the website** In the **Web Site** section, you can click the **Test** button to make sure the website is functional.
- **View the website** In the **Web Site** section, you can click **View** to open and view the Pulse website.

- 31. (Optional) Click the **Users** tab. On the Users tab you can select a group from the **Groups** drop-down field. The number of users in that group will then appear in the **Count** section. In the **Users** section, the names and email addresses of all the people in the group you selected will be displayed.



32. (Optional) Click the **Maintenance** tab.



**Note:** The tasks on the Maintenance tab are applicable to SQL Server Express when it is located on the same computer as IIS only. If instead you have SQL Server Standard, you can perform these remaining maintenance tasks in that application (see the steps below on the following pages). Automatic database backups by Pulse are not currently supported if you are using SQL Server Express, but only if it is located on a remote computer.

33. (Optional) In the **Location** field, enter the path where you want backups of the database and transaction log to be stored. You can click the Browse button to select a different database.
34. (Optional) In the **Day & Time** field, specify whether you want the backups to be created daily or weekly. Also, specify the day and time when you want the backup process to run.

In the **Services** section, the Start button should already be engaged. This enables backups to be created. Backups will be created for the database and the transaction log. In addition, this action "shrinks" the transaction log (which steadily grows over time).



**Warning:** Do not disable the MadCap Pulse Management Service or Rabbit MQ services. Pulse requires them to run in order to function properly.

35. (Optional) In the local toolbar of the Pulse Server Configuration, you can select from several button options.
  - **Configure Pulse** Click this button to configure a Pulse server.
  - **Uninstall Pulse Server** Click this button to begin uninstalling the current Pulse server. This will not uninstall the Pulse application, just the current Pulse server. The Pulse Server Configuration Window will still be accessible.
  - **Import Feedback Data** Click this button to import data from Feedback Server. 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.
  - **Clear Data** Click this button to clear the current Pulse server data.

## Connecting to a Remote SQL Server

If are installing Microsoft SQL Server on a remote machine, you must have "sysadmin permission" on the SQL Server itself (by default, administrators of the machine will usually have the correct permissions on the SQL Server).

Following are some frequently asked questions about getting set up when connecting to a remote machine running SQL Server. If SQL Server is running on the same machine, these FAQs do not apply to your situation.

### ***I CANNOT SEE MY SQL MACHINE IN THE DROP-DOWN LIST IN THE SERVER SETUP DIALOG. WHY CAN'T I SEE IT?***

Following are the three most common issues.

**Issue #1** Sometimes the SQL Server Browser Service has not been started. This is needed for your SQL machine to broadcast to the network. To verify this, right-click **Computer**. Then select **Manage>Services and Applications>Services>SQL Server Browser**. Select the service and click the **Play** button on the toolbar. This will start the service.

**Issue #2** Windows Firewall by default will block SQL ports to the outside world. The easiest solution is to turn the firewall off, but that is the more unsecure method. The other method would be to set an exception for SQL and the SQL Server Browser in the Firewall configuration.

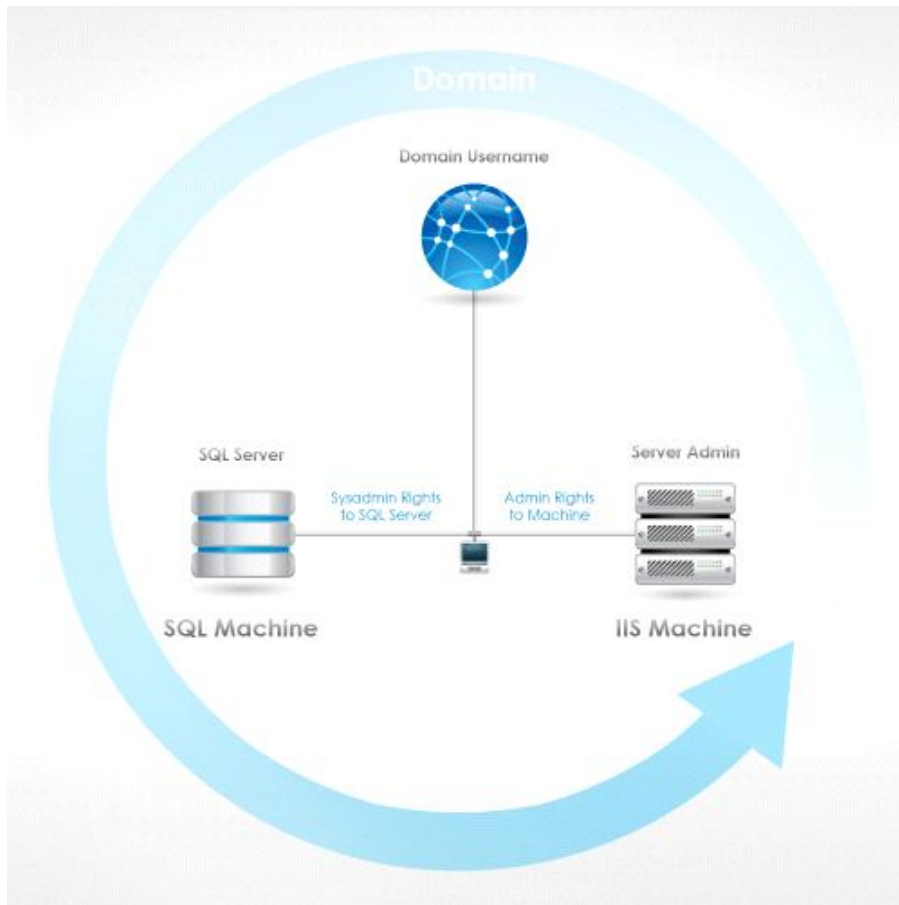
Default SQL port: **TCP/IP 1433**

Default SQL Server Browser port: **UDP 1434**

**Issue #3** Named Pipes or TCP/IP (or both) have been disabled in the SQL Configuration. Open the SQL Server Configuration Manager. Under **SQL Server network configuration**, select **Protocols for SQLEXPRESS** (MSSQLServer will be shown if you have the standard edition, or if a custom instance name was used during SQL installation, that will be shown here). Verify **Named Pipes** or **TCP/IP** is set to enabled. You may try setting both to enabled. After changing these settings, you may be prompted to stop and restart that particular SQL service.

### ***I NEED MORE CLARIFICATION ON THE "SYSADMIN PERMISSIONS" REQUIRED ON THE SQL SERVER***

The user who has administrator privileges on the IIS machine will also need to be able to access the SQL Server on the SQL machine. More specifically, that person will need the sysadmin privileges on the SQL Server. This does not mean the person needs administrative privileges to the SQL machine. The point is simply this: If the user name you are using is also the administrator of the SQL machine, then usually that user will have all the appropriate permissions to the SQL Server.



**Note:** If the SQL Server is located on a different machine, this final step will (a) install two Web services on the IIS machine and (b) install the Pulse Server database on the SQL Server machine.



**Note:** If the SQL Server and IIS are located on the same machine and you are using SQL Express, a Windows service will also be installed. The service handles the backing up of the database (configurable on the Maintenance tab of the Pulse Server Admin).



**Note:** The machine used to host the Pulse data can also be used to host the author's online output. However, this is not mandatory. The author may publish the output elsewhere.

## SQL Server 2008

On the same machine to be used for hosting FeedbackPulse, complete the following steps.

### **HOW TO INSTALL MICROSOFT WINDOWS SQL SERVER 2008**

1. Run the **SQL Server Installation Center**.
2. On the Installation page, click **New installation or add features to an existing installation**. An Open File dialog will appear.
3. In the Open File dialog, click **Run**.
4. **SQL Server 2008 Setup** will run **Setup Support Rules**. This identifies problems that might occur during the setup process. If any errors are found, they must be corrected before continuing. When the Setup Support Rules operation is complete, click **OK**. The Product Key page appears.
5. On the Product Key page, do one of the following.
  - Click the **Specify a free edition** button.OR
  - Click the **Enter a product key** button, then enter the product key in the field below.
6. Click **Next**. The License Terms page appears.
7. On the License Terms page, click the **I accept the license terms** checkbox so that there is a checkmark in it.
8. Click **Next**. The Setup Support Files page appears.
9. On the Setup Support Files page, click **Install**. The Setup Support Rules page appears.
10. On the Setup Support Rules page, click **Next**. The Feature Selection page appears.
11. On the Feature Selection page, click the checkboxes for **Full-Text Search**, **Management tools-Basic**, and **Management tools-Complete**.
12. Click **Next**. The Instance Configuration page appears.
13. On the Instance Configuration page, select either **Default instance** or **Named instance**, depending on whether you have a pre-existing instance of SQL Server.
14. Click **Next**. The Disk Space Requirement page appears.
15. On the The Disk Space Requirement page, click **Next**. The Server Configuration page appears.
16. On the Server Configuration page, leave all settings as their default settings *except* the entries under the **Startup Type** column. Change all the available Startup Type settings to **Automatic**.
17. Click **Next**. The Database Engine Configuration page appears.

18. On the Database Engine Configuration page, click either the **Windows Authentication Mode** or **Mixed Mode** button.



**Note:** If using Mixed Mode, 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. For steps, see "Changing Expired Passwords" on page 46.

19. Click **Add current user**.
20. On the Server Configuration page, click **Next**. The Error Usage Reporting page appears.
21. On Error Usage Reporting page, click **Next**. The Installation Rules page appears.
22. On the Installation Rules page, click **Next**. The Ready to Install page appears.
23. On the Ready to Install page, click **Install**. The installation will begin.
24. When the installation is complete, click **Close**.

## Installing SQL Server 2008 Express with Advanced Services

On the same machine to be used for hosting FeedbackPulse, complete the following steps.

### **HOW TO INSTALL SQL SERVER 2008 EXPRESS WITH ADVANCED SERVICES**

1. Run the **SQL Server Installation Center**.
2. On the Installation page, click **New installation or add features to an existing installation**. An Open File dialog will appear.
3. In the Open File dialog, click **Run**.
4. **SQL Server 2008 Setup** will run **Setup Support Rules**. This identifies problems that might occur during the setup process. If any errors are found, they must be corrected before continuing. When the Setup Support Rules operation is complete, click **OK**. The Installation Type page appears.
5. On the Installation Type page, click the **Perform a new installation of SQL Server 2008** button.
6. Click **Next**. The Product Key page appears.
7. On the Product Key page click **Next**. The License Terms page appears.
8. On the License term page, click the checkbox next to **I accept the license terms** so that there is a checkmark in it.
9. Click **Next**. The Feature Selection page appears.
10. On the Feature Selection page, click the checkboxes for **Database Engine Services**, **Full-Text Search**, **Management tools-Basic**, and **SQL Client Connectivity SDK**.
11. Click **Next**. The Instance Configuration page appears.
12. On the Instance Configuration page, select either **Default instance** or **Named instance**, depending on whether you have a pre-existing instance of SQL Server.
13. Click **Next**. The Disk Space Requirement page appears.
14. On the The Disk Space Requirement page, click **Next**. The Server Configuration page appears.
15. On the Server Configuration page, leave all settings as their default settings *except* the entries under the **Startup Type** column. Change all the available Startup Type settings to **Automatic**.
16. Click **Next**. The Database Engine Configuration page appears.

17. On the Database Engine Configuration page, click either the **Windows Authentication Mode** or **Mixed Mode** button.



**Note:** If using Mixed Mode, 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. For steps, see "Changing Expired Passwords" on page 46.

18. Click **Add current user**.
19. On the Server Configuration page, click **Next**. The Error and Usage Reporting page appears.
20. On the Error and Usage Reporting page, click **Next**. The Installation Rules page appears.
21. On the Installation Rules page, click **Next**. The Ready to Install page appears.
22. On the Ready to Install page, click **Install**. The installation will begin.
23. When the installation is complete, click **Close**.

## SQL Server 2008 R2 Express

On the same machine to be used for hosting FeedbackPulse, complete the following steps.

### HOW TO INSTALL SQL SERVER 2008 R2 EXPRESS

1. Run the **SQL Server Installation Center**.
2. On the Installation page, click **New installation or add features to an existing installation**.
3. **SQL Server 2008 R2 Setup** will run **Setup Support Rules**. This identifies problems that might occur during the setup process. If any errors are found, they must be corrected before continuing. When the Setup Support Rules operation is complete, click **OK**. The Installation Type page appears.
4. On the Installation Type page, click the **New Installation or add shared files** button. Click **Next**. The License Terms page appears.
5. On the License Terms page, click the **I accept the license terms** checkbox so that there is a checkmark in it.
6. Click **Next**. The Feature Selection page appears.
7. On the Feature Selection page, click the checkboxes for **Database Engine Services**, **Full Text Search**, **Management tools-Basic**, and **SQL Client Connectivity SDK** so that they have checkmarks.
8. Click **Next**. The Installation Rules page appears.
9. On the Installation Rules page click **Next**. The Instance Configuration page will appear.
10. On the Instance Configuration page, select either **Default instance** or **Named instance**, depending on whether you have a pre-existing instance of SQL Server.
11. Click **Next**. The Disk Space Requirement page will appear briefly before switching to the Server Configuration page.
12. On the Server Configuration page, leave all settings as their default settings *except* the entries under the **Startup Type** column. Change all the available Startup Type settings to **Automatic**.
13. Click **Next**. The Database Engine Configuration page appears.
14. On the Database Engine Configuration page, click either the **Windows Authentication Mode** or **Mixed Mode** button.



**Note:** If using Mixed Mode, 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. For steps, see "Changing Expired Passwords" on page 46.

15. Click **Add current user**.
16. Click **Next**. The Error Reporting page appears.
17. On the Error Reporting page, click **Next**. The Installation Configuration Rules page appears.
18. On the Installation Configuration Rules page, click **Next**. The installation begins.
19. When the installation is complete, click **Close**.

## SQL Server 2008 R2

On the same machine to be used for hosting FeedbackPulse, complete the following steps.

### *HOW TO INSTALL SQL SERVER 2008 R2*

1. Run the **SQL Server Installation Center**.
2. On the Installation page, click **New installation or add features to an existing installation**. An Open File dialog will appear.
3. In the Open File dialog, click **Run**.
4. **SQL Server 2008 R2 Setup** will run **Setup Support Rules**. This identifies problems that might occur during the setup process. If any errors are found, they must be corrected before continuing. When the Setup Support Rules operation is complete, click **OK**. The Setup Support Files page appears.
5. On the Setup Support Files page, click **Install**. The Setup Support Rules page appears.
6. On the Setup Support Rules page, click **Next**. The Installation Type page appears.
7. On the Installation Type page, click the **New Installation or add shared files** button.
8. Click **Next**. The Product Key page appears.
9. On the Product Key page, click the **Enter a product key** button, then enter the product key in the field below.
10. Click **Next**. The License Terms page appears.
11. On the License Terms page, click the **I accept the license terms** checkbox so that there is a checkmark in it.
12. Click **Next**. The Setup Role page appears.
13. On the Setup Role page, click the **SQL Server Feature Installation** button.
14. Click **Next**. The Feature Selection page appears.
15. On the Feature Selection page, click the checkboxes for **Database Engine Services**, **Full-Text Search**, and **Management tools-Basic** so that they have checkmarks.
16. Click **Next**. The Installation Rules page appears.
17. Click **Next**. The Instance Configuration page appears.
18. On the Instance Configuration page, select either **Default instance** or **Named instance**, depending on whether you have a pre-existing instance of SQL Server.
19. Click **Next**. The Disk Space Requirement page appears.
20. On the The Disk Space Requirement page, click **Next**. The Server Configuration page appears.

21. On the Server Configuration page, leave all settings as their default settings *except* the entries under the **Startup Type** column. Change all the available Startup Type settings to **Automatic**.
22. Click **Next**. The Database Engine Configuration page appears.
23. On the Database Engine Configuration page, click either the **Windows Authentication Mode** or **Mixed Mode** button.



**Note:** If using Mixed Mode, 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. For steps, see "Changing Expired Passwords" on the next page.

24. Click **Add current user**.
25. Click **Next**. The Error Reporting page appears.
26. On the Error Reporting page, click **Next**. The Installation Configuration Rules page appears.
27. On the Installation Configuration Rules page, click **Next**. The Ready to Install page appears.
28. On the Ready to Install page, click **Install**. The installation will begin.
29. When the installation is complete, click **Close**.

### Changing Expired Passwords

You can change passwords for Pulse and Feedback that have expired.

When you complete the authentication fields during installation of Pulse or Feedback, 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. 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.

# CHAPTER 3

## Enabling Pulse in Flare

To integrate Pulse with your Flare output, you need to enable the Pulse functionality in a Flare target. You also need to create or select a community for the target. A community is simply the entity for a collection of Pulse data. You can perform these tasks on the Community tab in the Target Editor.

The Community tab in the Target Editor shows information for either Pulse or Feedback, depending on the type of server you enter. The Pulse interface looks like this.

The screenshot shows the 'Website Output' interface with a sidebar on the left containing menu items: General, Conditional Text, Variables, Publishing, Glossary, Relationship Table, Advanced, Performance, **Community**, and Language. The main content area is titled 'Target Editor' and includes 'Build' and 'View' icons. A green callout bubble points to the 'Enable Pulse/Feedback Server' checkbox, which is checked. Another callout points to the 'Server' section, which includes a text box for the URL (currently 'http://myserverurl/pulse') and a note: 'If your server supports secure transfer, use https:// in front of the URL. For example, https://myserver.mydomain.com/pulse'. A third callout points to a 'Community Login' section with a 'Current User' field containing 'pulseadmin' and 'Login' and 'Logout' buttons. Below this is a 'Community' section with a 'Communities:' dropdown menu showing 'MyCommunityName' and 'Manage' and 'Remap Topics' buttons. At the bottom, a 'Current Pulse Configuration' section displays: 'Subscription Pulse Server: Expires on 2/18/2013', 'Activated', 'Internal Users: 1/18', and 'External Users: 11/14'. A 'Refresh' button is located at the bottom left. Several other callouts provide additional context: 'You can view the information about the current Pulse server.' points to the configuration details; 'You can refresh the server information.' points to the 'Refresh' button; 'You can add, rename, or delete communities.' points to the 'Manage' button; and 'This can be used if you make changes to topics and republish the output. Use caution when using this feature. You may not need to use it much, if at all.' points to the 'Remap Topics' button.

**HOW TO ENABLE PULSE IN FLARE**

1. From the Project Organizer, open the target.
2. In the Target Editor, select the **Community** tab.
3. Click the **Enable Pulse/Feedback Server** check box so that it has checkmark in it.
4. In the **Server URL** field, enter the path to the server hosting the data. Flare downloads the configuration and the tab changes to show Pulse fields.



**Note:** It is highly recommended that you purchase an SSL certificate and install it on your Web server. MadCap Pulse uses encryption for certain processes, which helps to ensure that the data transfer is secure. If you have an SSL certificate installed on your Web server, make sure you begin the path to the server with `https://`. For example, a valid path to the Web server with an SSL certificate installed would be `https://myserver.mycompany.com`.

5. If the Current User field shows the default pulseadmin and you have already set yourself up as an administrator, you can click **Logout** and then click **Login** to enter your new username and password. See "Making Yourself an Admin" on page 51.
6. In the **Community** section, either click in the drop-down and select an existing community, or click **Manage** to add a new one.



**Note:** For merged projects in Pulse, you must set the community in the master project. All the child projects will use that community. This differs from Feedback Explorer, which requires a separate product key for all child projects.


7. In the **Current Pulse Configuration** section, you can view information about the configuration of the current Pulse server that has been selected in the Community tab. This includes the following.
  - **License type** The type of license that has been activated (Trial, Full Version, Subscription, and Evaluation) and the license's expiration date are displayed.
  - **Activations status** The activation status of the Pulse server is displayed, either as Activated or Deactivated.
  - **Internal Users** This displays the number of registered internal users and the total number of internal users allowed (e.g., 1/10). Internal users can consist of Administrators and

Employees. They have access to the Community tab in the Pulse-enabled output and can leave comments on topics.

- **External Users** This displays the number of external users registered and the total number of external users allowed (e.g., 5/50). External users consist of Customers. They do not have access to the Community tab in the Pulse-enabled output, but can still leave comments on topics.



**Note:** If a user is registered in both the Customer group (external user) and the Employee group (internal user), the user will only count towards the Employee total number.

8. (Optional) You can click the **Refresh** button to reload the information about the Pulse server.
9. Click  to save your work.

Using a skin, you can include the Community tab in your output. This tab lets users edit their profiles, view different apps (e.g., messages, notifications, tasks, images), view lists, and access topics marked as favorites. However, this is optional. You do not need to add the Community tab to have Pulse-enabled output.

# CHAPTER 4 Making Yourself an Admin

After the Pulse server is installed, there is just one administrator for it, with the username and password that were created during the installation and configuration process. One of the first things you may want to do is add yourself and perhaps others as administrators. You can do this and perform other administrator tasks by opening a browser and navigating to the URL where the Pulse server is installed.

## **HOW TO MAKE YOURSELF AN ADMINISTRATOR**

1. In a browser, enter the path to your Pulse server and log in with the admin information (username and password) that was created during the installation and configuration process.
2. Select the **Administration** menu and click **Settings**.
3. Click **Users**.
4. At the bottom, click **Invite a User**.
5. Complete at least the name and email fields.
6. Toward the bottom in the **Group** section, select **Administrators**.
7. Click **Send Invite**.
8. Open the email that was sent to you and in the message click **Login**.
9. Select **With my e-mail address and a password**.
10. Enter a password that you want to use.
11. Click **Continue**.
12. (Optional) You can complete any other profile fields that you want.
13. Click **Continue**. You are now set up as an administrator.
14. (Optional) You can click **Go to My Feed**.

### **HOW TO REMOVE AN ADMINISTRATOR FROM THE ADMINISTRATOR GROUP**

With the following steps, an administrator is removed from the administrator level but is still a member.

1. If you are not already logged in, open a browser, enter the path to your Pulse server, and log in with your administrator information.
2. Select the **Administration** menu and click **Settings**.
3. Click **Groups**.
4. Type an **a** in the field. The Administrators group displays below.
5. Select **Administrators**.
6. Click **Manage Group**.
7. Select the **Membership** tab. Users already belonging to the group are listed.
8. Click an administrator to remove the check mark.
9. Click **Save**.

### **HOW TO DELETE AN ADMINISTRATOR ENTIRELY**

With the following steps, an administrator is removed from Pulse altogether. You might do this to free up a space in the community for someone else to use.

1. If you are not already logged in, open a browser, enter the path to your Pulse server, and log in with your new administrator information.
2. Select the **Administration** menu and click **Settings**.
3. Click **Users**.
4. Begin typing the name of the administrator in the field.
5. Select an administrator from the list.
6. Click **Next**.
7. On the right side, click **Delete**.
8. Click **Delete User**.

# CHAPTER 5 Pulse Features

Pulse offers several features, from viewing news feeds in topics to sharing files, to creating groups.

This chapter discusses the following.

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<b>Communities and the Community Tab</b> .....	<b>56</b>
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## Pulse Integrated with Topics

Much of the activity for Pulse can be found at the bottom of your topics in the output. Under the topic content is where comments, statuses, questions, articles and tasks are displayed. You can also search the feed displayed under the topic. Additionally, you can send emails, add topics to favorites, create and edit tags, and send invitations to users. See "Enabling Pulse in Flare" on page 47.

The screenshot shows a Pulse feed interface with several callouts explaining features:

- Top Callout:** "With Pulse enabled, you will see something like this at the bottom of topics." (Points to the feed area)
- Left Callout 1:** "You can enter status updates, as well as questions, articles, and tasks below the topic." (Points to the input area)
- Left Callout 2:** "You can search the Feed using this field." (Points to the search bar)
- Left Callout 3:** "Here is the Feed, where all the updates to the topic appear." (Points to the feed area)
- Right Callout 1:** "You can send email, add topics to favorites, add/edit tags, and invite new users." (Points to the top right icons)
- Right Callout 2:** "There are options for each update under the post." (Points to the interaction options below a post)

The interface includes a top navigation bar with tabs for Status, Question, Article, and Task. Below this is a search bar labeled "Search this Feed". The main feed area displays three posts:

- Post 1:** Robert Martinez shared an article to Astronomy. Title: "All About Stars!". Content: "Stars are gigantic balls of super hot plasma that sustain nuclear fusion inside them." Interaction options: just now - Comment - Like - Edit - Unfollow - Tag - Share.
- Post 2:** Robert Martinez added a task for Robert Martinez. Title: "Research Stars". Content: "Research stars". Tag: "stars". Interaction options: just now - Comment - Like - Edit - Unfollow - Tag - Share.
- Post 3:** "What is the closest nearby star?". Content: "Add Details". Author: "Asked By Robert Martinez to Astronomy".

On the right side, there are sections for "Tags" (with an "Edit" link), "Invites", and "Invite People".

## Communities and the Community Tab

A community is a collection of users and set of features that let people interact with one another around Flare online output. To integrate Pulse with your Flare output, you can create a new community or select an existing one in the target. As a result, people seeing your output can join the community and therefore share comments, information, and expertise on the content.

The screenshot shows the 'Community' tab in the 'Website Output' interface. The left sidebar contains navigation options: General, Conditional Text, Variables, Publishing, Glossary, Relationship Table, Advanced, Performance, **Community**, and Language. The main content area includes:

- Enable Pulse/Feedback Server:** A checked checkbox with a callout: "Select **Enable Pulse/Feedback**".
- Server:** A section with a callout: "Enter the server URL." containing a text field for the URL (http://myserverurl/pulse) and a note: "If your server supports secure transport, use https:// in front of the URL. For example, https://myserver.mydomain.com/pulse".
- Community Login:** A section with a callout: "Select a community from this drop-down menu." containing a 'Current User' field (pulseadmin), 'Login' and 'Logout' buttons, and a 'Community' dropdown menu (MyCommunityName) with 'Manage' and 'Remap Topics' buttons. A callout: "If you make yourself an administrator, you can log out as the generic pulseadmin and log back in with your new username/password." points to the 'Logout' button.
- Current Pulse Configuration:** A section with a callout: "You can view the information about the current Pulse server." containing: "Subscription Pulse Server: Expires on 2/18/2013", "Activated", "Internal Users: 1/18", and "External Users: 11/14".
- Refresh:** A button with a callout: "You can refresh the server information."
- Manage:** A button with a callout: "You can add, rename, or delete communities."
- Remap Topics:** A button with a callout: "This can be used if you make changes to topics and republish the output. Use caution when using this feature. You may not need to use it much, if at all."

Using a skin, you can include the Community tab in your output. This tab lets users edit their profiles, view different apps (e.g., messages, notifications, tasks, images), view lists, and access topics marked as favorites. However, this is optional. You do not need to add the Community tab to have Pulse-enabled output.

The screenshot shows the 'WebsiteSkin' HTML5 Skin Editor interface. The 'General' settings panel is active, displaying various configuration options. A red box highlights the 'Community' checkbox under the 'Features' section, with a callout bubble indicating that selecting this option includes the Community tab. The 'Features' section also includes checkboxes for 'TOC (default)', 'Index', 'Glossary', and 'Browse Sequences', along with a 'Make Default' button. The 'Options' section has a checked 'Automatically Synchronize TOC' checkbox. The 'Unreferenced Images' section shows radio buttons for 'Keep' (selected) and 'Remove On Save', with a '(quick help)' link. The sidebar on the left lists categories: General, Size, Setup, Toolbar, Community, Styles, and UI Text.

The screenshot shows the Madcap Pulse software interface. At the top left is the Madcap Software logo. Below it are three navigation tabs: 'Contents', 'Index', and 'Community'. The 'Community' tab is selected. The main content area shows a user profile for 'Paul Stoecklein' with a profile picture of a dog and links for 'Edit My Profile' and 'Logout'. Below the profile is a section titled 'Your Apps' with a 'MORE' link. The apps listed are 'Most Recent', 'Messages' (with a '0' notification badge), 'Notifications' (with a '0' notification badge), 'Tasks', and 'Mentions'. At the bottom, there is a 'Lists' section with 'Favorites'.

The Community tab lets you edit your profile, view messages, access apps, and perform other Pulse tasks.

Clicking **MORE** lets you add and customize the apps that appear on the Community tab.

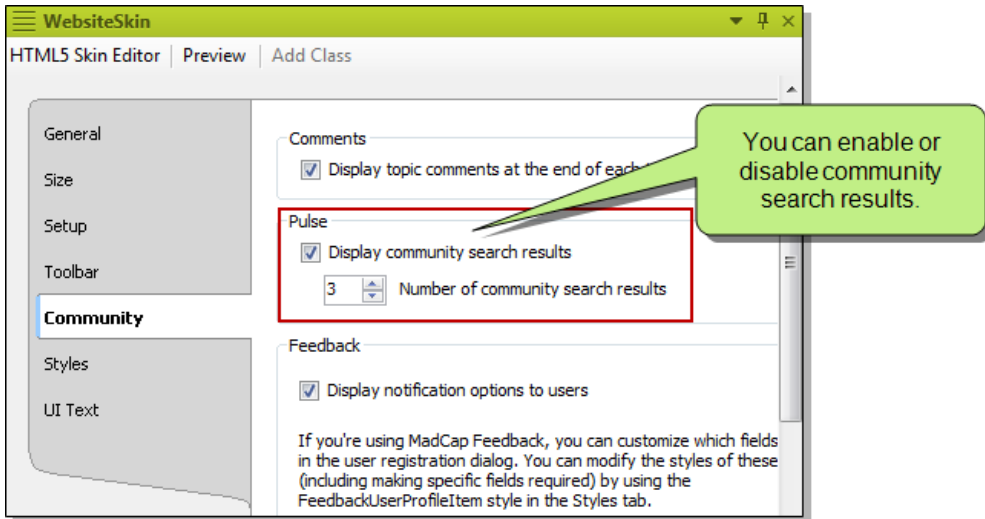
These apps appear by default on the Community tab, but more can be added.



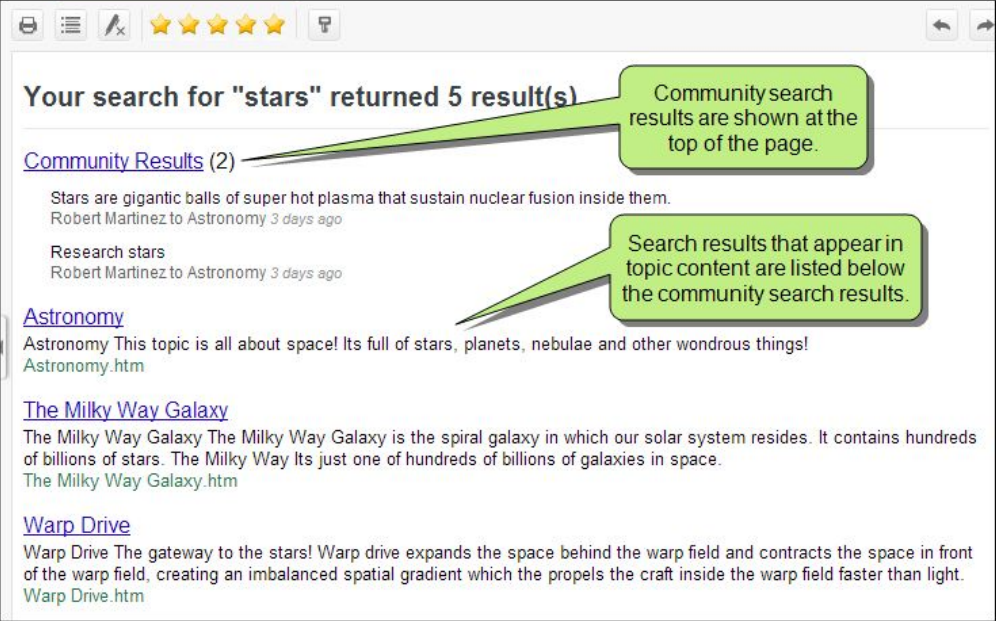
**Note:** In order to use the "Your Apps" section of the Community tab, you must be an Employee (Advanced User) or Administrator.

## Community Search Results

Community search results can be merged with search results in the output. You can enable this feature in the skin. The default number of results is 3.



These are search results in HTML5 output.



**Your search for "stars" returned 5 result(s)**

[Community Results \(2\)](#)

- Stars are gigantic balls of super hot plasma that sustain nuclear fusion inside them.  
Robert Martinez to Astronomy 3 days ago
- Research stars  
Robert Martinez to Astronomy 3 days ago

[Astronomy](#)  
Astronomy This topic is all about space! Its full of stars, planets, nebulae and other wondrous things!  
[Astronomy.htm](#)

[The Milky Way Galaxy](#)  
The Milky Way Galaxy The Milky Way Galaxy is the spiral galaxy in which our solar system resides. It contains hundreds of billions of stars. The Milky Way Its just one of hundreds of billions of galaxies in space.  
[The Milky Way Galaxy.htm](#)


[Warp Drive](#)  
Warp Drive The gateway to the stars! Warp drive expands the space behind the warp field and contracts the space in front of the warp field, creating an imbalanced spatial gradient which the propels the craft inside the warp field faster than light.  
[Warp Drive.htm](#)

Community search results are shown at the top of the page.

Search results that appear in topic content are listed below the community search results.

These are search results in WebHelp output.

**Search**


stars  

**Community Results (2)**

Stars are gigantic balls of super hot plasma fusion inside them.  
Robert Martinez to Astronomy 3 days ago

Research stars  
Robert Martinez to Astronomy 3 days ago

**Topic Results**

Rank 	Title
1	Astronomy
2	The Milky Way Galaxy
3	Warp Drive

Community search results are shown at the top of the page.

Search results that appear in topic content are listed below the community search results.

Clicking the Community Results link shows all community results.



The screenshot shows a search results page for the query "stars". The page displays five results, each with a title, author, and location. Two callouts are present: one pointing to the total number of results (5) and another pointing to a specific result title.

**Your search for "stars" returned 5 result(s).**

How many stars are in the Universe?  
Robert Martinez to The Milky Way Galaxy 9 minutes ago

How many stars are in the Milky Way Galaxy?  
Robert Martinez to The Milky Way Galaxy 9 minutes ago

\*nearest stars  
Robert Martinez to Warp Drive 10 minutes ago

Stars are gigantic balls of super hot plasma that sustain nuclear fusion inside them.  
Robert Martinez to Astronomy 3 days ago

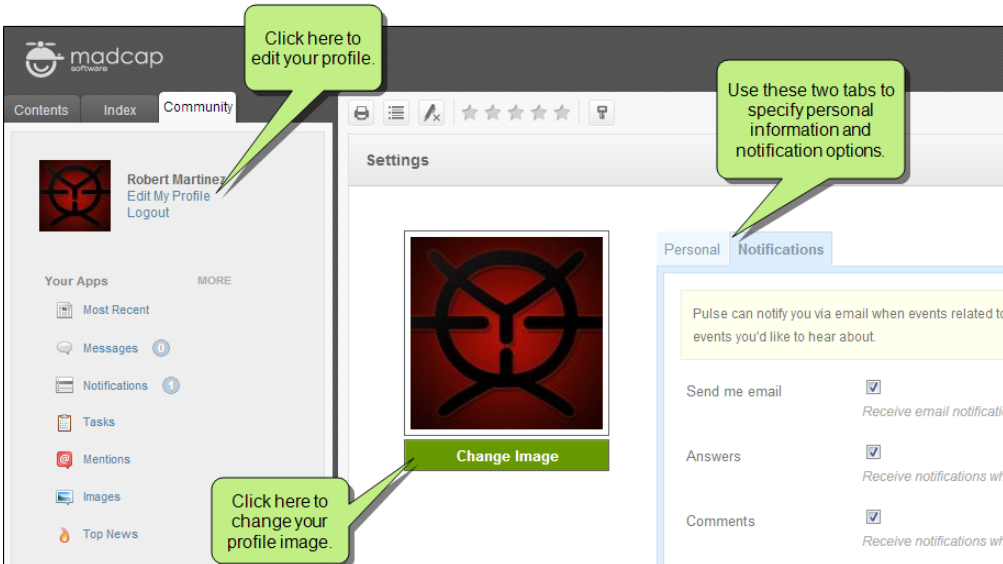
Research stars  
Robert Martinez to Astronomy 3 days ago

The total number of community search results is displayed.

You can click on any of the community search results to go to the topic where they are located.

## Profiles and Notifications

You can create profiles with images, information on specific skills, knowledge, and expertise, along with contact and other personal information. You can also specify which activities should trigger email notifications (e.g., when people comment on your posts, when people follow you). If you want to minimize email notifications, you can sign up for a daily digest. The daily digest compiles your activities and delivers it to you at the end of the business day.

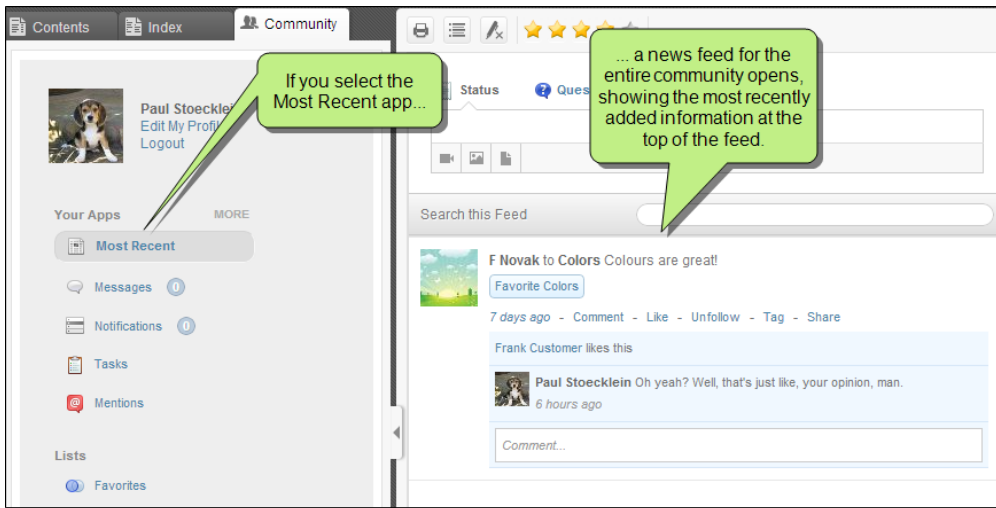


## News Feed

You can view the news feed at the bottom of individual topics to stay engaged with people, groups, projects, and topics of interest with a real-time stream of the most relevant activity. This feed shows comments and other news related to a topic. You can also select the Most Recent app in the Community tab to see news for the entire community, regardless of the topics; this view shows the most recent information at the top of the feed.

The science of color is sometimes called chromatics, chromatography, colorimetry, or simply color science. Perception of color by the human eye and brain, the origin of color in materials, color theory in art, and the physical electromagnetic radiation in the visible range (that is, what we commonly refer to simply as light).

The screenshot displays a topic page with a news feed. At the top, there is a navigation bar with tabs for Status, Question, Article, and Task. Below this is a search bar labeled "Search this Feed". The main content area shows a post by "F Novak to Colors" with the text "Colours are great!" and a "Favorite Colors" button. Below the post, there is a comment by "Frank Customer" and a reply by "Paul Stoecklein" saying "Oh yeah? Well, that's just like, your opinion, man." To the right of the feed, there is an "Invites" section with an "Invite People" button and a "powered by NEUESIC" logo. A green callout bubble points to the top of the feed, stating: "In this example, part of a topic is shown above, and the news feed at the bottom displays information for that topic."



## Following People

You can follow anyone in your community.

To find people that you want to follow:

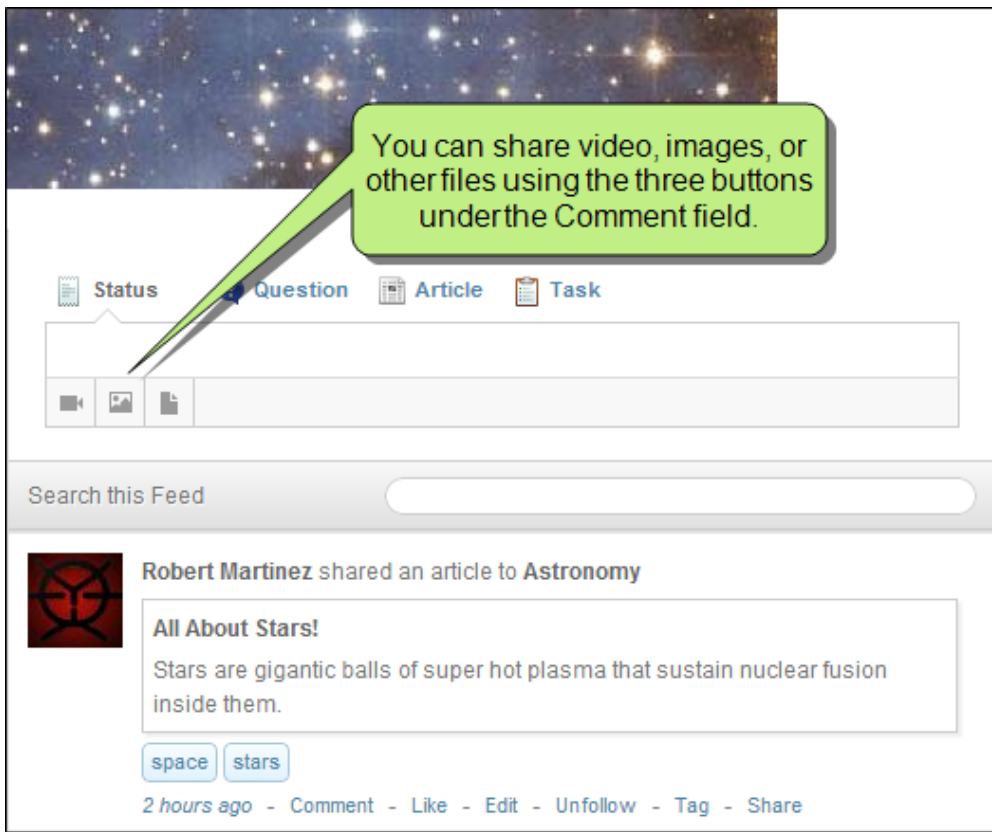
1. From the browser Home page, click **People**.
2. To search by name, click in the **People Search** box.
3. Start typing the person's first or last name and press **Enter**. This will generate a search result based upon your entry.

You can follow a person by clicking on their Profile Image or name at which point you are directed to their profile page. You will see a Follow button on the left side of the screen. If you are already following this person, you will see an Unfollow button. Or you can hover over their avatar, which will pop up a contact card that also allows you to follow the person.

The more people you follow the more insight and updates you'll receive about your company. Getting the most out of Pulse requires you to get to know the people that you are working with. Following people means that you have an interest in what they have to say. The more people you follow the more engaged you will feel with Pulse.

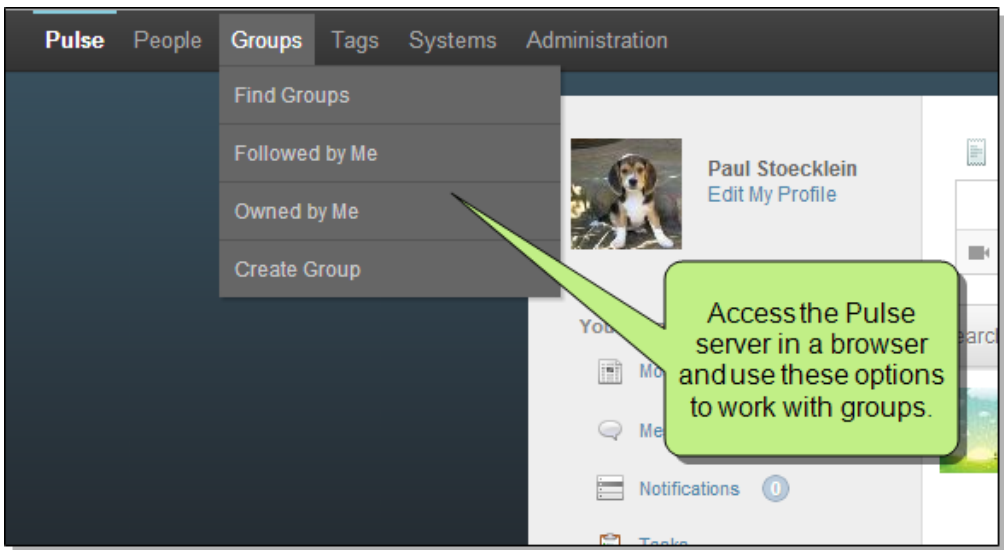
## File Sharing

You can upload and share a wide variety of content—including documents, multimedia, images, and other files—to enhance the information available on a particular discussion or topic.



## Groups

From the browser Groups menu, you can create groups or communities around particular document sets, general discussions, or individual topics. Groups are a good way to get people in the Pulse community organized to accomplish common goals. Some common groups might include Human Resources, Marketing, and Sales. You can create your own group and invite People to share conversations. You can also adjust the group settings to make private groups that will not appear in Pulse users' searches.



The screenshot displays a 'Marketing Group' interface with several callout boxes:

- Enter updates, questions, articles, tasks, or upload multimedia and files here:** Points to the top navigation bar containing 'Status', 'Question', 'Article', and 'Task' options.
- View the group's current tags here:** Points to the 'Marketing' tag in the 'Tags' section.
- Add tags to the group by clicking Edit:** Points to the 'Edit' button next to the 'Marketing' tag.
- Invite people to the group:** Points to the 'Invite People' button in the 'Invites' section.
- You can post updates to the the group's Feed:** Points to the main feed area where a post from 'Pulse Administrator to Marketing Group' is visible.
- Open a dialog to adjust the group's settings, such as name, description, audience, privacy settings, and profile image:** Points to the 'Settings' button in the left sidebar.
- Open a chat window and send messages to the group:** Points to the chat icon in the left sidebar.
- All the apps available to the group are listed here:** Points to the 'Updates', 'Links', and 'Images' sections in the left sidebar.
- Search the group's feed:** Points to the 'Search this Feed' input field.

### **CREATING GROUPS**

To create a group:

1. From the browser Home page, hover over **Groups**.
2. Click **Create Group**.
3. You can specify anything in the **Name** and **Description** fields.
4. Here you can also edit your privacy settings if you wish.
5. Click **Create this Group**.

### **WORKING WITH A PARTNER OR CUSTOMER?**

Use Pulse as a collaborative workspace. While setting up your Pulse group, change the audience to "Employees and Customers." Once this is done inviting users from an external network is easy. Once the group is setup, open it and do the following.

1. Click **Invite People** on the right bar.
2. Click **Invite Customer**.
3. Input a valid email address and a welcome message.
4. Click **Invite**.

### **SECURING GROUPS**

Groups are a great way to create a secure location for topics as well. To create a secure group, perform the following actions:

1. From the browser Home page, hover over **Groups**.
2. Click **Create Group**.
3. Input a **Name** and **Description**.
4. In the **Privacy** section, select **Add a user or group**.
5. Begin typing the first or last name of the person you want to invite.
6. Click the check box next to their name.
7. You can begin type another person's name to add more people.

### **CUSTOMIZING GROUPS**

You can customize your group after you initially create them. To customize your Group, perform the following actions:

1. From your Group, click **Settings**.
2. Edit the **Name** field as you see fit.
3. Click **Change Image** to select a custom image for your group.
4. You can customize the privacy of your group here as well.
5. Click **Save**.

### **SECRET GROUPS**

If you would like to create a group and have it not be discoverable within Pulse, mark it as private. To make a group private, simply uncheck the **Allow Users to Find This Group** button.

### **FOLLOWING GROUPS**

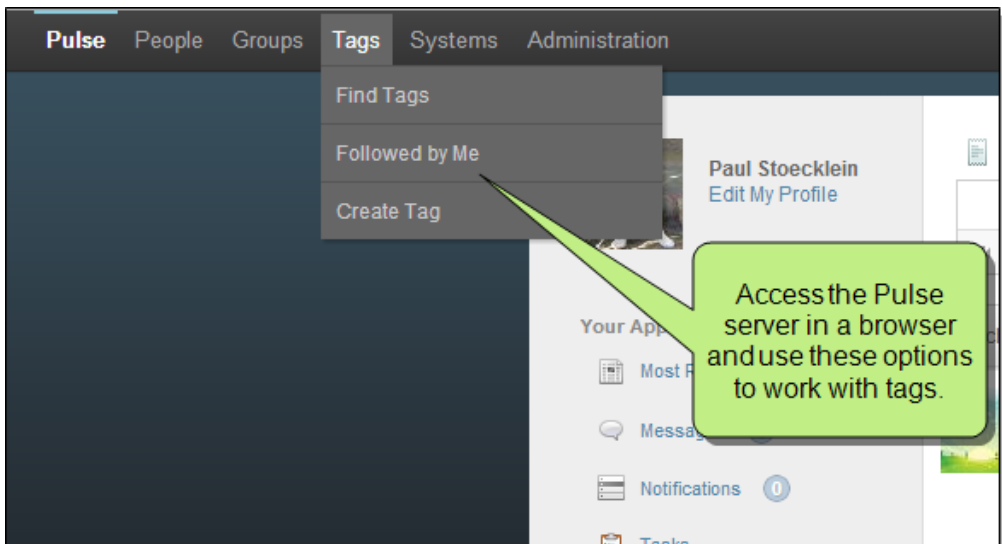
In the same manner that you follow people, you can follow groups. The activity of that group will automatically be added to your feed.



**Note:** These groups are different from those that are accessed from the Administration menu (Settings option). The groups under Administration are for authentication purposes, to assign levels to people (Administrator, Employee, Customer).

## Tagging

From the browser Tags menu, you can create and work with tags. These are markers that you can insert into Feed updates that allow you to access activity quickly and easily from the Tags section. Feed updates, such as comments, articles, images, or multimedia can all be marked with multiple tags. Tags are an easy way to aggregate conversations of related people, groups, questions, systems, and phrases. You can think of a tag as a category. For example, if you want to categorize people based on their location, you could create a tag called “West Region” and add all the people to that tag. The result would be one place to see all conversations in the West Region.



The screenshot shows a social media feed interface with a top navigation bar containing 'Status', 'Question', 'Article', and 'Task' icons. A search bar is located below the navigation bar. The main feed area displays two posts by Robert Martinez. The first post is an article titled 'All About Stars!' with the text 'Stars are gigantic balls of super... inside them.' Below the text are two tags: 'space' and 'stars'. The second post is a task titled 'Research Stars' with the text 'Research stars' and one tag: 'stars'. On the right side of the interface, there are sections for 'Tags' (with an 'Edit' link and a 'space' tag) and 'Invites' (with an 'Invite People' link). Two green callout boxes provide instructions: one points to the top right area where tags are listed, and the other points to the tags displayed below the first post.

Tags are listed here.

Inserted tags are displayed below the post. You can insert multiple tags.

### **WHY USE TAGS?**

The goal of a tag is to limit the amount of explicit follows you must make to get a complete picture. The best approach is to create a tag so you can see for yourself.

### **CREATING TAGS**

To create a tag:

1. From any group, person, system, or phrase, on the right hand side of the screen, you will see Tags.
2. Click **Edit**.
3. In the textbox input any word that describes your group, person, system, or phrase.

To tag a post:

1. Create and share the post with the audience of your choice.
2. Once posted, click the **Tag** option below the post.
3. Begin to enter the appropriate tag. Pulse will auto-generate a list of similar tags.
4. Choose or create the appropriate tag and click **Update**.

### **TAG HIERARCHY**

We approach tags as categories that relate all people, groups, systems, and phrases. Pulse also allows you to link tags together by using parent/child tags. If you have a broad category labeled a parent tag, Pulse allows you to gather content from any sub-category and display it with the parent tag. To assign parent/child tag relationships:

1. Go to the page of your parent tag and click **Settings**.
2. Click **Management**.
3. Start typing the name of the parent tag. Pulse should auto-complete to avoid mistakes.
4. Beneath it enter appropriate child tags, separating them with a comma. Click **Save**.

Once these relationships have been established, you will see that information from child tags will begin to populate the parent tag's page.

### ***PRIVATE TAGS***

If you would like to keep a tag private from the company:

1. Go to the tag's page.
2. Click **Settings**.
3. Click **Privacy**.
4. Remove all users from the list.
5. Click **Add a user or group**.
6. Choose people and groups that can modify this tag.
7. Use the drop-downs to set the access level for each person or group.
8. Only owners can modify the settings of this tag.

## Questions

You can ask a question and pose it to other users by clicking the Question option under the topic. When the question is asked, you can always add content to the question by clicking Add Details, or comment below the question. Answers to questions can be voted up or down in the Feed that appears below the question.

The screenshot shows a question post with the following elements and callouts:

- Question Title:** "What is the closest nearby star?" (Callout: "Here is the question that has been asked.")
- Rich Text Editor:** Includes bold (B), italic (I), underline (U), bulleted list, numbered list, and image icons. Below it is the text "Besides the Sun of course!" (Callout: "You can add details to the question right below it.")
- Metadata:** "Asked By Robert Martinez to Astronomy" and a "stars" tag.
- Actions:** "3 hours ago - Comment - Unlike - Unfollow - Tag - Share - Ask"
- Feedback:** "You like this."
- Answer:** "Robert Martinez I just found out! It's Proxima Centauri!" (Callout: "You can vote the answer up or down.")
- Answer Interaction:** A vote count of "1" with up/down arrows, the name "Robert Martinez", the text "The answer is Proxima Centauri.", and "Vote just now - Comment - Like".
- Answer Input:** A text box labeled "Answer..." (Callout: "You can answer the question here.")

### **ASKING QUESTIONS**

To ask a question:

1. Under a topic, or from the browser Home page click **Question**.
2. In the provided text box, begin typing your question.
3. If your question has already been asked, you can select it from the drop down.
4. Click **Share**.

Now that you have added a question you will be notified via email when an answer is provided. A great way to make sure people see your question is to tag it.

### **ANSWERING QUESTIONS**

To answer a question:

1. Click the title of the question.
2. In the textbox below, begin typing you answer.
3. Once complete, click **Answer**.

### **VOTING ON ANSWERS**

A key component of Pulse Questions is in the crowd-sourcing of answers. This capability is provided to you in the form of voting for answers. When reviewing a question and its related answers you can click the vote up or vote down arrows. As an answer accumulates “up” votes it will rise to the top. To vote on answers, perform the following actions

1. Click the number next to the answer you want to vote on.
2. You will notice an up arrow and a down arrow.
3. If you like the answer click the up arrow.
4. If you do not like the answer click the down arrow.

### **TAGGING QUESTIONS**

For further refinement you can tag your questions so that the right people are aware of the question. For example, if you ask the question, “What is SharePoint?” including the tag SharePoint will increase its visibility to the right people in the community.

Tags are also used in identifying experts within a company. Building on the previous example, as more questions use the SharePoint tag, and more folks answer questions about SharePoint, those people will be recognized as experts. This is how we provide reach expert identification for our customers. Rather than depend on self-proclaimed expertise, Pulse helps our customer identify the actual experts.

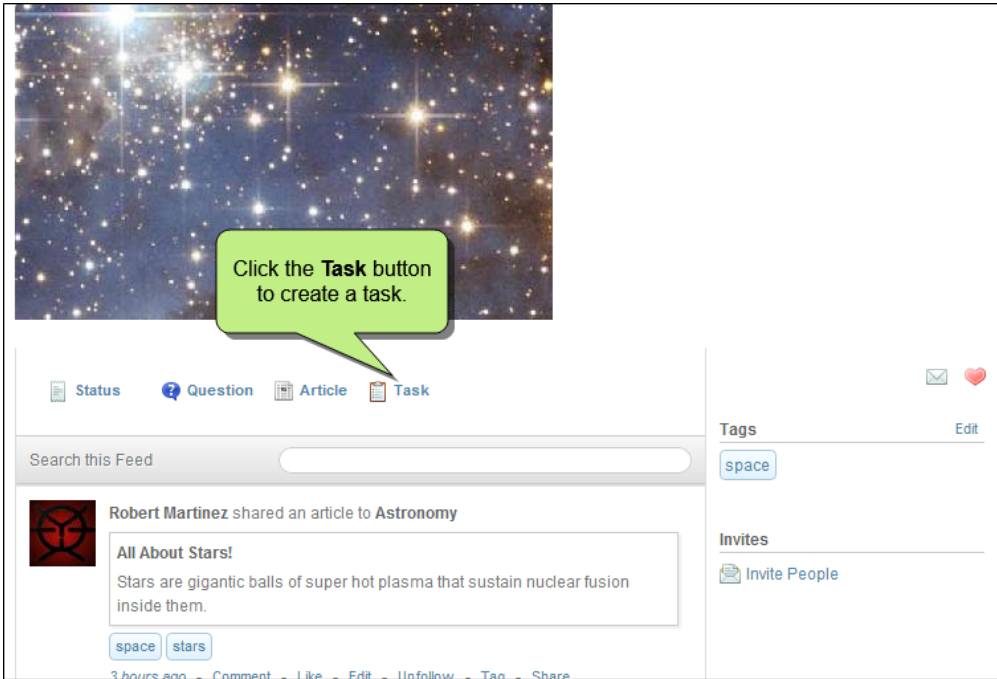
## Phrases

Pulse allows you to follow phrases or words as they are posted. For example, if you want to know every time someone mentions Product A or Customer A, you can use the "Find Phrases" along with the "Follow this Phrase" to have your feed include these conversations. To follow a Phrase:

1. From the Home page, begin to type the phrase you want to follow in the Search bar.
2. The search will give you the option to **Search for Posts with this Phrase**.
3. On the results page you will see the matches for the phrase you search.
4. Click **Follow**.

## Tasks

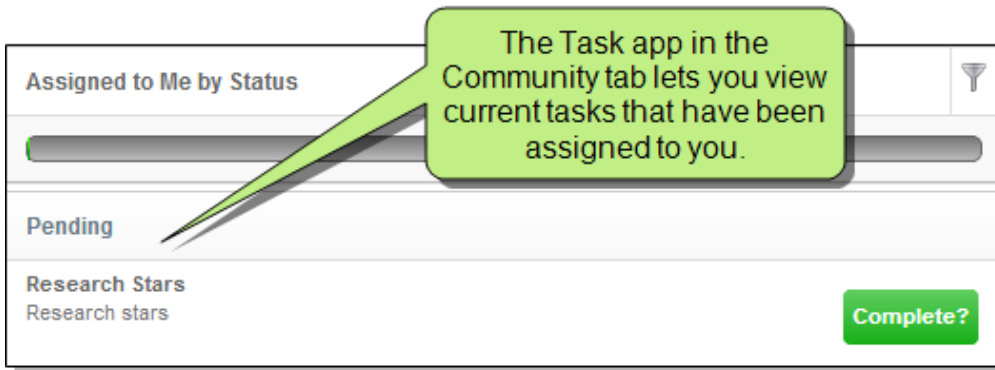
Tasks let you create detailed reminders and notifications about pending tasks. You can enter a description, assign the task to users, include tags, set a due date, rate the task's importance, and mark the task as either pending or completed. The list of tasks is available to view by clicking the Tasks app in the Community tab.



The image shows a task creation form with the following fields and controls:

- Enter a name...** (Text input field)
- Description**  
*Enter a description...* (Text input field)
- Assigned To**  
+ (Add button)
- Tags**  
+ (Add button)
- Due**  
Select a Date (Date picker)
- Importance**  
Low (Dropdown menu)
- Status**  
Pending (Dropdown menu)
- Save** (Green button)    **Cancel** (Text button)

A green callout box with a pointer to the 'Description' field contains the text: "You can fill out detailed information about the task."



Pulse allows users to delegate tasks to others in their network; it also allows users to keep track of other people's progress using the Task option on your Home screen.

To assign a task begin by clicking the **Task** option. You have the option of customizing the task by providing a description, adding tags, and assigning the task to as many people as you like. You can also rank the task's importance and assign a due date. After you fill out all your desired fields just click Save.

### **COMPLETING TASKS**

When someone asks you for help using Pulse tasks, you will receive a notification. To view the task, click the **Tasks** link on the Community tab or browser Home page. Here you will see the list of pending and completed tasks.

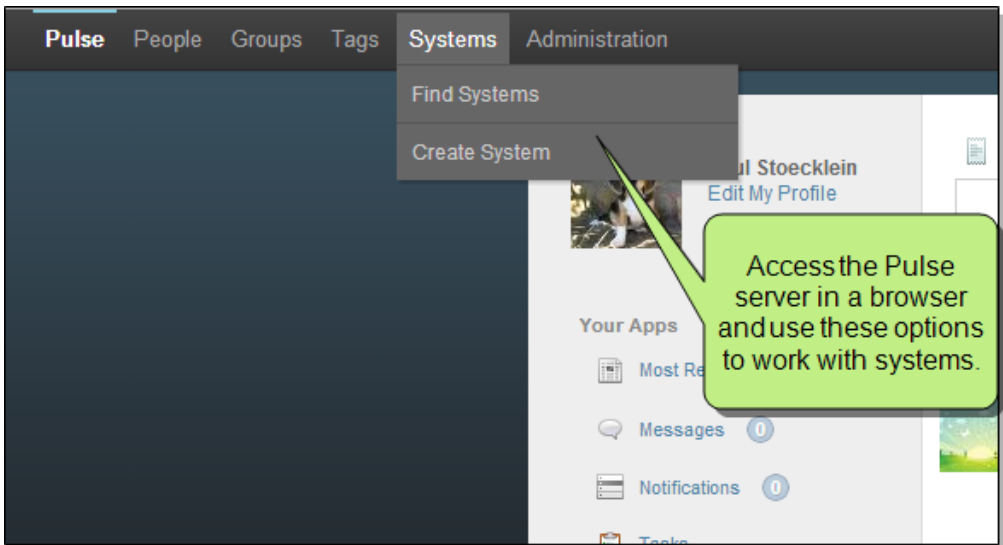
In the Pending area, you can see the details of the task (e.g., due dates, tags, people you will be working with).

Once a task is complete, go back to the Tasks page, click **Complete** on the proper task in the Pending section, and it will be transferred to the Completed section.

## Systems


From the browser Systems menu, you can create and work with systems. A system gathers information from external sources and then provides that information to Pulse users. For example, an administrator can tie in updates from a social media site, an e-commerce site, or customer relationship management software to the Pulse feed. Users can then interact with those updates as needed. Administrators can also adjust the settings so that the system will post content to the external source on the user's behalf. They can also change how frequently Pulse updates the system feeds with information from the external source by adjusting the poll period, as well as alter the source type and user permissions.

When you create communities in a Flare target, they show up as Pulse systems.




**Social Media System**

This system ties in a social media site.



[Settings](#)

[Add Feed](#) +



**1 Feed**

Search this System

Social Media Feed	1 followers
-------------------	-------------

## Staying Organized with Pulse

Pulse has a number of features that have been built to help users stay organized and have access to the content and data they need.

### ***FAVORITES***

Everything that can be followed within Pulse has its own page, whether it is a topic, person, group, system, or tag. Favorites can be used as filters. In the Community tab, you can click the “Favorites” List to auto-organize your news feed into the most recent updates from your favorites.

### ***LIST***

Lists are a quick and easy way to organize your news feed into topics you care about. To make a list:

1. Go to the page (People, Groups, Systems, or Tags) you would like to add to a list.
2. Click on the heart button.
3. Click **+New List**.
4. Input a name.
5. Make sure the page(s) you want on your list are checked.

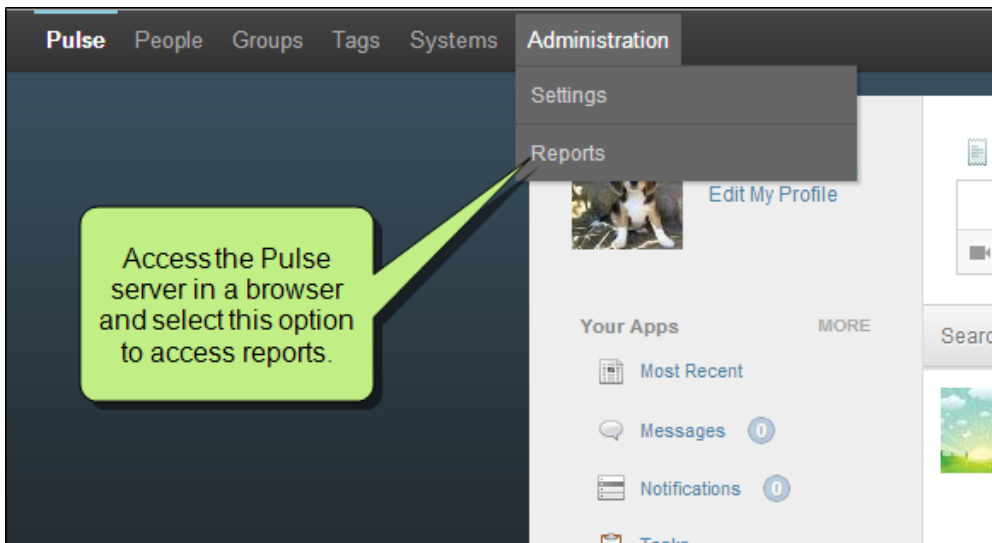
Once created, your new list will be available on your feed to be used as an easy way to filter through your data.

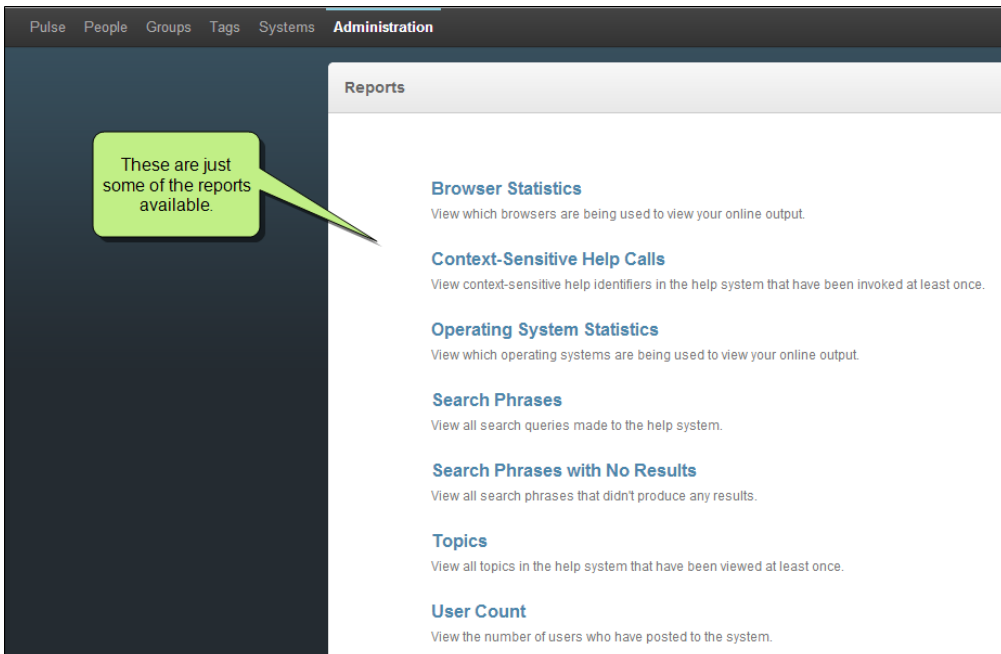
### ***FILTERS***

In every People, Groups, and Tags page in Pulse you have the option to filter the content by type from within the page. Pulse filters are located on the Community tab. Filters allow users to organize content by Links, Images, Files, Videos, Questions, Articles, and Tasks.

## Reports

From the browser Administration menu, you can access a wide variety of reports to see and track reader activity.





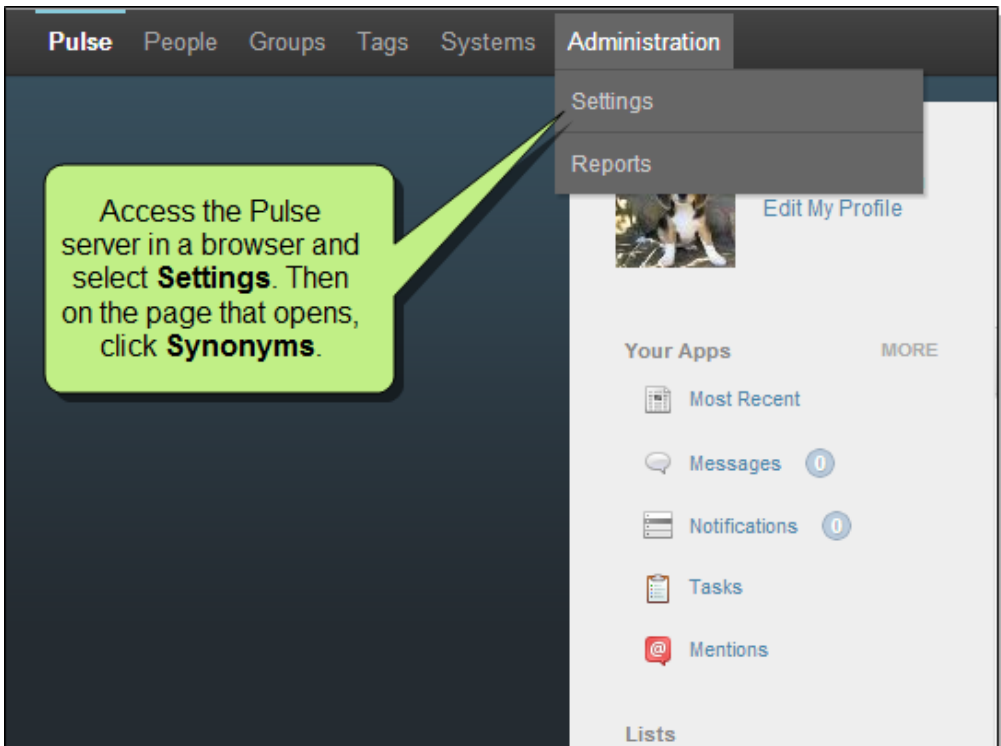
This includes the following (short descriptions of each report are provided on the browser page):

- Browser statistics
- Context-sensitive Help calls
- Operating system statistics
- Search phrases
- Search phrases with no results
- Topics
- User count
- Overall activity
- User activity
- Most active people

- Most active groups
- Most followed people
- Most liked people
- Most commented people
- Most liked activities
- Most commented activities
- Most liked file shares
- Most commented image shares
- Most liked link shares
- Most commented link shares
- Storage usage

## Synonyms

If users enter search phrases in your online output and those phrases are not returning results, this does not need to be the end of the story. You can make improvements to your output so that, in the future, users are able to find the search results they need. One way to make an enhancement is to create synonyms for search phrases. You can create synonyms within the Flare project or from the browser Administration menu.



It is not mandatory that you have Pulse in order to use synonyms in Flare output, but using Pulse makes it much easier to determine which words require synonyms based on the search results of your users. Using the browser for the Pulse server to create synonyms is appealing because the synonyms become immediately available for users searching in your output (without needing to republish the output). Be aware, however, that creating synonyms in the browser works for the output as long as you continue to publish output to the same server. If you create synonyms in the browser, it is recommended that you also create those

synonyms at the source (i.e., within the Flare project), in case you ever publish to a different server. The easiest way to do this is to use the link in the browser to export your synonyms to that Flare project.

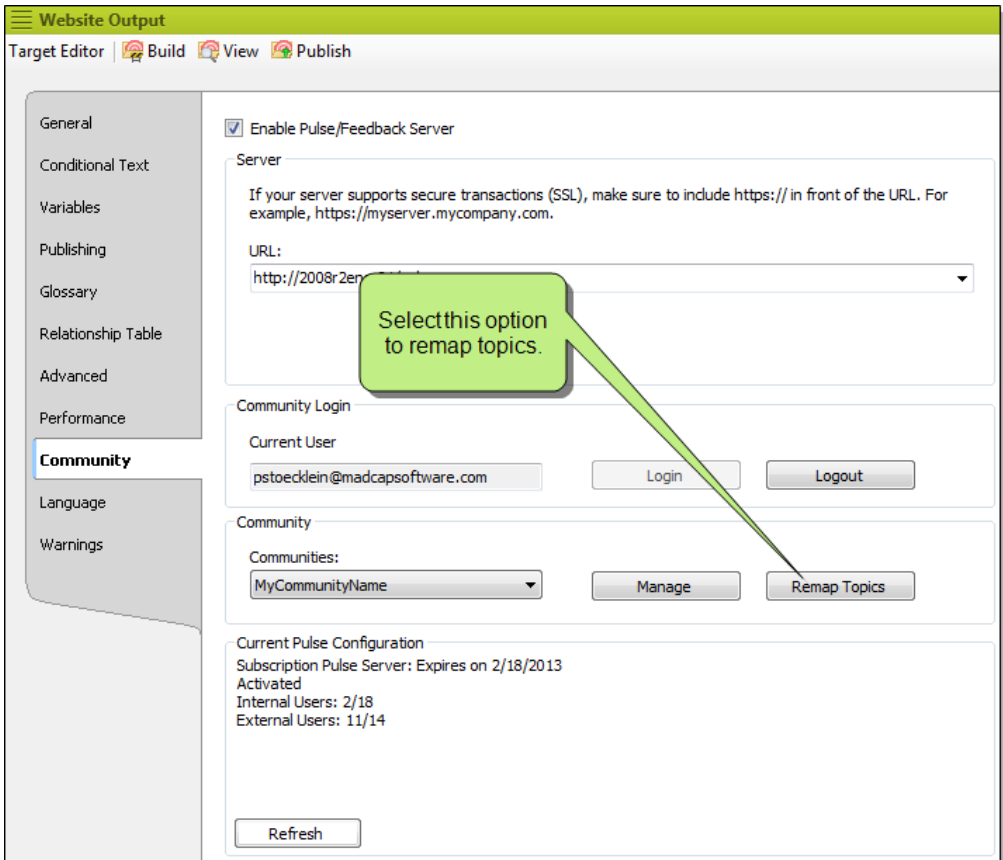
The screenshot shows the 'Synonyms' management interface. At the top left, a callout bubble says 'Use this area in the browser to create synonyms.' pointing to the main content area. At the top right, there is a 'Community:' dropdown menu set to 'PE Demo'. The main content area is titled 'Directional' and 'Groups'. It contains explanatory text: 'With directional synonyms, when a user searches for a term in the "Word" column, the help system will also include results for the term in the "Synonym" column. For example: Word: "car", synonym: "ferrari". A search for car will include all search results for the word "ferrari". If the stem box is checked, all forms of the word in the "Word" column will be included. For example, "car" and "cars".' Below this text is a table header: 'Word Synonym Stem + New'. At the bottom left are two buttons: 'Save Changes' and 'Discard Changes'. At the bottom right is an 'Export (.mcsyns)' link. A second callout bubble says 'You can click here to export synonyms.' pointing to the export link.

**E X A M P L E**

Let's say that you view search keyword results from your users and find that many are entering the search term "sofa." Unfortunately, you have not used that word in your project, so users are unable to find the topics that they need. However, you have used a similar word, "couch." Therefore, you enter "couch" as a synonym for "sofa." The next time a reader enters "sofa" as a search keyword, topics containing the word "couch" will be returned in the results.

## Remap Topics

A remap option is available on the Community tab in the Target Editor. This option compares the Pulse data with the table of contents in your online output to look for changes. This is done in case topics have been renamed or moved and helps to keep the topics and the Pulse server data in sync.



The screenshot displays the 'Website Output' interface in the 'Target Editor'. The left sidebar contains a menu with options: General, Conditional Text, Variables, Publishing, Glossary, Relationship Table, Advanced, Performance, **Community**, Language, and Warnings. The main content area is divided into several sections:

- Enable Pulse/Feedback Server:** A checked checkbox.
- Server:** A text input field with a dropdown arrow, containing the URL 'http://2008r2en...'. A green callout box points to this field with the text 'Select this option to remap topics.'
- Community Login:** A 'Current User' field containing 'pstoecklein@madcapsoftware.com', with 'Login' and 'Logout' buttons.
- Community:** A 'Communities:' dropdown menu showing 'MyCommunityName', with 'Manage' and 'Remap Topics' buttons.
- Current Pulse Configuration:** A summary of Pulse server status: 'Subscription Pulse Server: Expires on 2/18/2013', 'Activated', 'Internal Users: 2/18', and 'External Users: 11/14'. A 'Refresh' button is located below this section.



**Warning:** Please use caution with this feature so that you do not accidentally erase Pulse data that you want to keep. Do not click OK in the dialog unless you are certain you want the topics to be synced according to the tabs in the dialog.

# APPENDIX PDF Guides

You can download any of the following PDF guides from the online Help. Just open the topic called "PDF Guides" and click any of the download links. You can also scan any of the following QR codes to open the PDF on your mobile device.



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