madcap software

USER GUIDE

MADCAP PULSE 4

Installation on Windows Server 2008

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CHAPTER 1

Introduction

The installation of Pulse depends on multiple applications and utilities working together. There are a couple of types of deployment you can use, and you can install Pulse on one of three different operating systems. The installation type that you choose will depend on factors that are specific to your environment, such as the number of users you plan to host, your web usage, and other factors related to deploying an SQL database and IIS server.

This guide discusses how to install Pulse on Windows Server 2008.

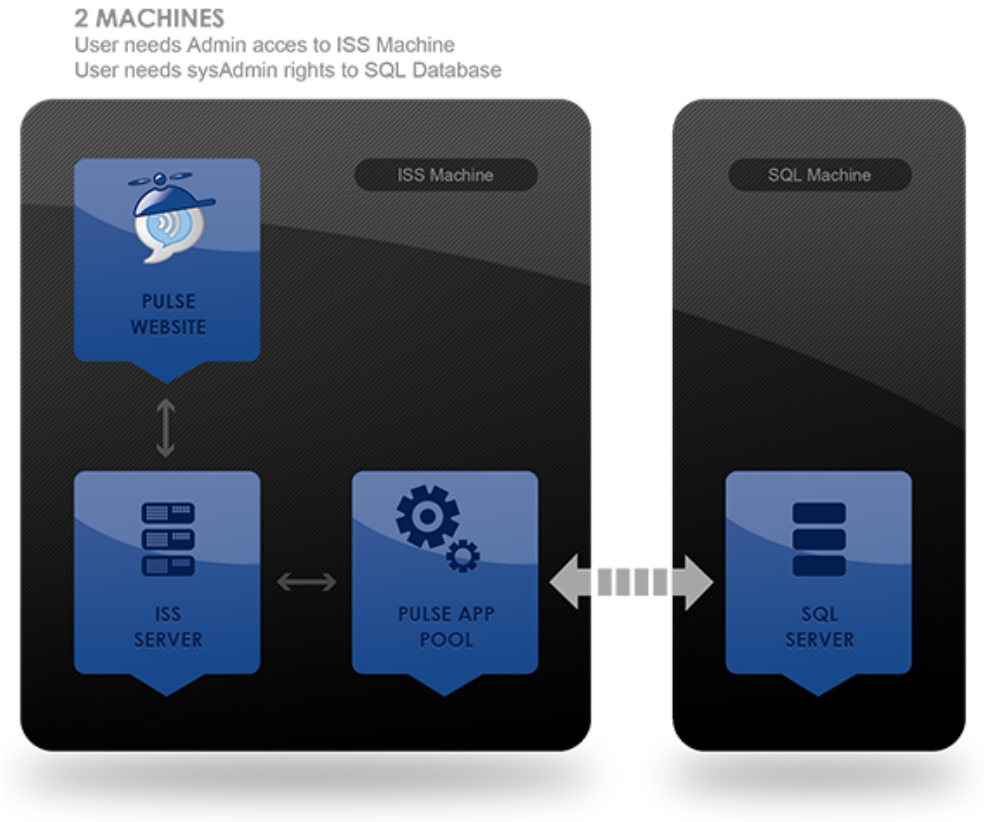
This chapter discusses the following:

Two-Server Deployment 7
Single-Server Deployment 8

Two-Server Deployment

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

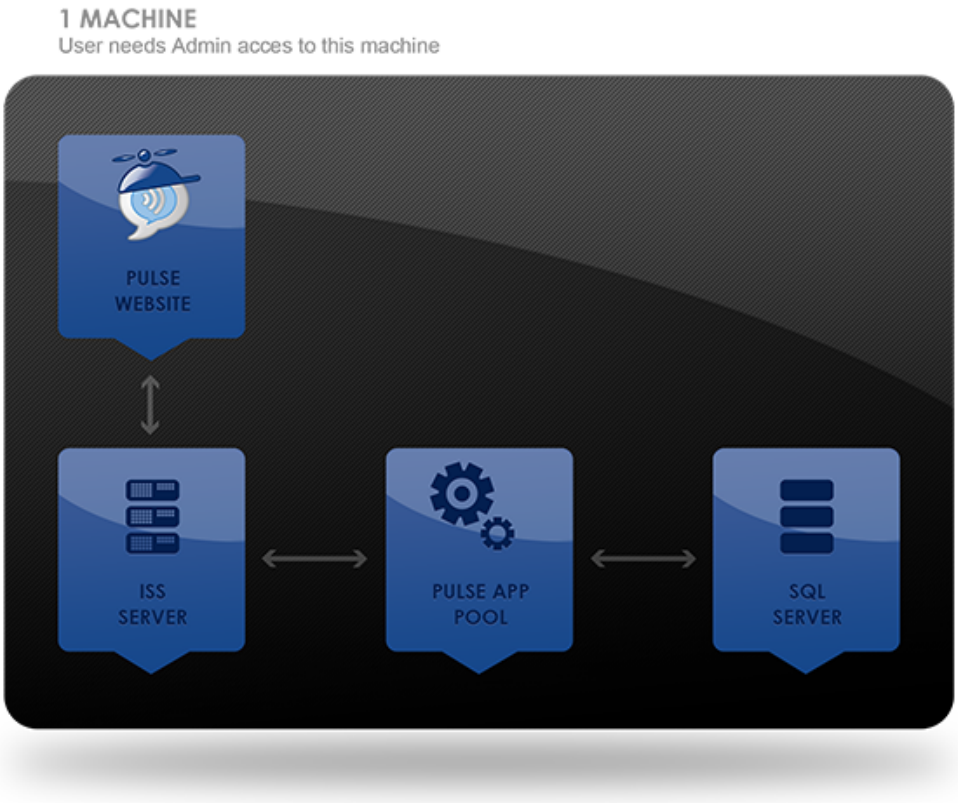
- Pulse Web Server The web server is a Windows Server system running Microsoft Internet Information Services (IIS). You install the Pulse server application on this system.
- Pulse Database Server The database server is a Windows Server system running Microsoft SQL Server. You install an instance of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



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

Single-Server Deployment

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



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

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

CHAPTER 2

Requirements

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

This chapter discusses the following:

Pulse Web Server 10

Pulse Database Server 13

Required Access Credentials and Networking Information 16

Pulse Web Server

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

WEB SERVER—MINIMUM HARDWARE REQUIREMENTS

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

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

WEB SERVER—OPERATING SYSTEM REQUIREMENTS

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

> IMPORTANT: You should at least be using Service Pack 2 (SP2) or later. Also, all of the latest Windows service packs and critical updates must also be installed.

The Pulse setup program installs the Pulse application on the Pulse web server (this is the server running IIS). Before running the setup program, you must you must make sure Microsoft .NET Framework is installed.

Requirement	Notes
Microsoft Windows Installer (MSI) 4.5	The MSI 4.5 or later is not included with the operating system. You can download version 4.5 or later and install it from the Microsoft Download Center.
Internet Information Services Version 7 (IIS 7.0)	This is included with the operating system. Use the Server Manager to add the Web Server (IIS) role service.
ASP.NET 4.0	This is included with the operating system. Use the Server Manager to add the ASP.NET role service. This is covered in the steps for installing IIS.
Microsoft .NET Framework 4.5 (Recommended) or 4.0 (Minimum)	If you do not already have .NET framework 4.5 or 4.0, you can download it from the Microsoft Download Center. ■ **.NET framework 4.5** You can download it from: http://www.microsoft.com/en-us/-download/details.aspx?id=30653 ■ **.NET framework 4.0** You can download it from: http://www.microsoft.com/en-us/-download/details.aspx?id=17718

WEB SERVER—PULSE SETUP PROGRAM

The Pulse setup program installs the Pulse application on the Pulse web server (this is the server running IIS). Before running the setup program, you must you must make sure Microsoft .NET Framework is installed..

WEB SERVER—MICROSOFT VISUAL C++ 2010 REDISTRIBUTABLE

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

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

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

WEB SERVER—RECOMMENDED BROWSERS

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

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

Pulse Database Server

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

DATABASE SERVER—MINIMUM HARDWARE REQUIREMENTS

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

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

DATABASE SERVER—OPERATING SYSTEM REQUIREMENTS

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

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

Requirement	Notes
Microsoft Windows Installer (MSI) 4.5 or later	The MSI 4.5 or later is not included with the operating system. You can download version 4.5 or later and install it from the Microsoft Download Center.
Internet Information Services Version 7 (IIS 7.0)	This is included with the operating system. Use the Server Manager to add the Web Server (IIS) role service.
ASP.NET 4.0	This is included with the operating system. Use the Server Manager to add the ASP.NET role service. This is covered in the steps for installing IIS.
Microsoft .NET Framework 4.5 (Recommended) or 4.0 (Minimum)	If you do not already have .NET framework 4.5 or 4.0, you can download it from the Microsoft Download Center. ■ **.NET framework 4.5** You can download it from: http://www.microsoft.com/en-us/-download/details.aspx?id=30653 ■ **.NET framework 4.0** You can download it from: http://www.microsoft.com/en-us/-download/details.aspx?id=17718
Microsoft Visual C++ 2010 Redistributable	Not included with the operating system. If the operating system is not running Microsoft Visual C++ 2010 or newer, you are prompted to download and install it.

DATABASE SERVER—SQL SERVER REQUIREMENTS

To give end users the ability to use the Pulse search features, you must install a supported version of Microsoft SQL Server. The edition you install must support the full-text search feature. Please refer to the documentation provided with SQL Server to determine if that edition supports full-text search.

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

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

Required Access Credentials and Networking Information

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

Item	Requirements	Purpose
Active Directory Domain Account	Create a Domain Account with Local Administrator Rights for the Pulse Server. This account will need: ■ A password that never expires ■ A valid email address in Active Directory ■ Read access to Active Directory ■ You should also grant this account System Administrator (sysadmin) privileges in SQL Server.	Used by the PulseService on the application server to schedule notifications, send emails, and deliver posts. Used by the Web Application Pool.
DNS Entry	■ Resolves to the Pulse web server ■ Uses a fully qualified domain name	The URL that Pulse Administrators use to access the Pulsedashboard.
Outbound Email Settings (SMTP Relay)	Port 25 (typical, depends on your network)	Gives Pulse the ability to send outbound email messages.
Inbound Email Settings	To enable reply-to email capabilities, you will need settings for one of the following: ■ POP3 host, username, and password OR ■ Exchange Web Services URL,domain, username, and password for the Microsoft Exchange account OR ■ SMTP Drop Folder	Required by Pulse web server to provide reply-to email capabilities.

Item	Requirements	Purpose
SSL Certificate for Pulse Web Server (Optional)	If you plan to use the Secure Sockets Layer (SSL) protocol to establish an encrypted connection with your Pulse site, you must obtain an SSL certificate from an SSL provider and install it on the Pulse web server.	Gives site visitors the ability to access your site using the secure https:// protocol. Use the Internet Information Services (IIS) Manager to install the SSL Certificate.

CHAPTER 3

Installing the Prerequisites

Information for Network Administrators

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

This chapter discusses the following:

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Before You Begin

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

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

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

  OR

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

Installing the Prerequisites

First, install Windows Server 2008 (SP2) on the system acting as the Pulse web server and Pulse database server. Whether you are setting up a new server or just using an existing Windows server, you should also ensure that the operating system is updated with all of the latest service packs, critical patches, and security updates from Microsoft.

If you are not familiar with how to install a server operating system, contact your Windows Administrator and/or Network Administrator for assistance. This will help to ensure that your server is in compliance with any security and network requirements specific to your environment.

> IMPORTANT: You must upgrade the operating system to Service Pack 2 (SP2) or later.

> IMPORTANT: If you are not familiar with how to install a server operating system, contact your Windows Administrator and/or Network Administrator for assistance. This will help to ensure that your server is in compliance with any security and network requirements specific to your environment. See "Requirements" on page 9.

HOW TO INSTALL IIS

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

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

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

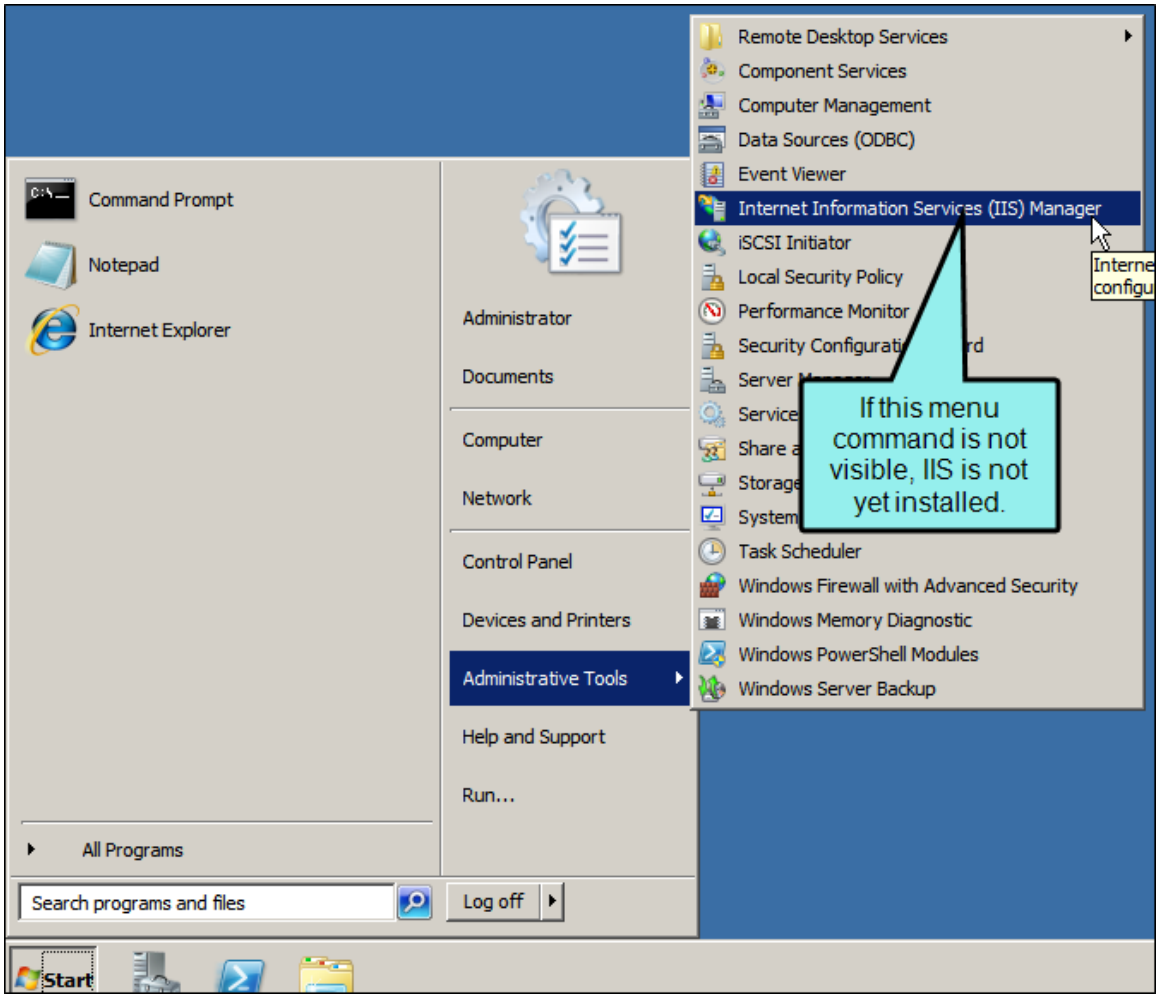
> IMPORTANT: Do not run IIS on a domain controller or a backup domain controller.

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

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

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

2. Determine if the appropriate version of IIS is installed on the operating system.
    a. Click **Start > Administrative Tools** and look for the **Internet Information Services (IIS) Manager** menu command.



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

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

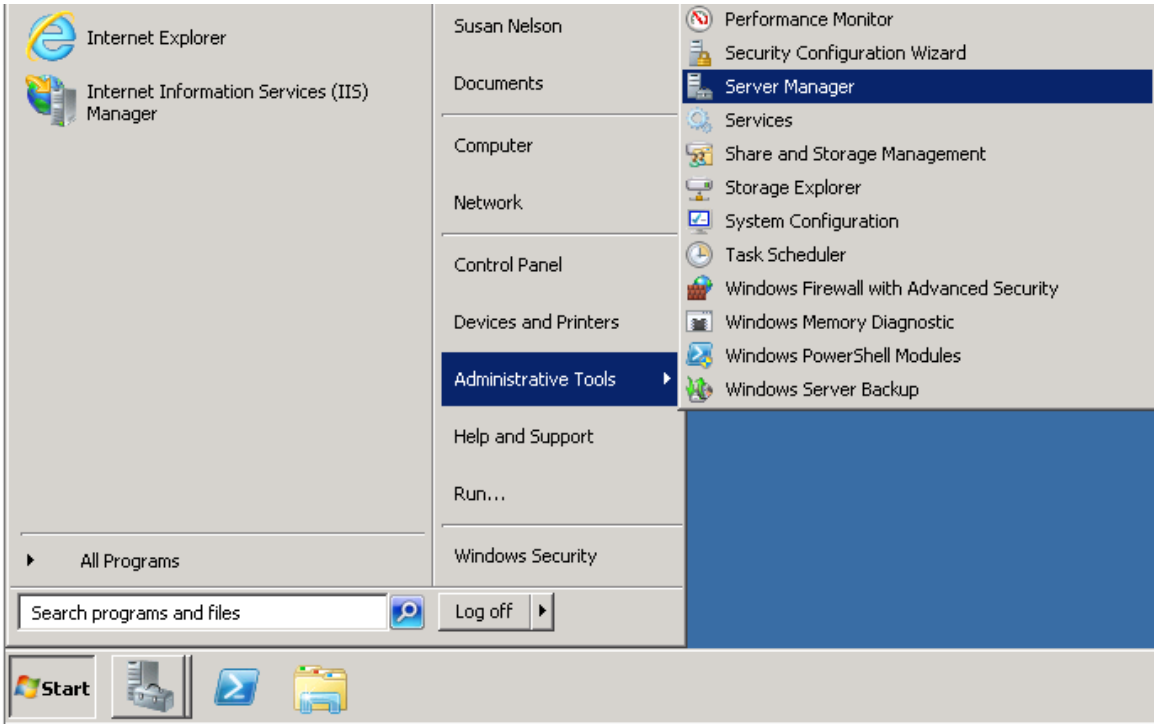
  OR

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

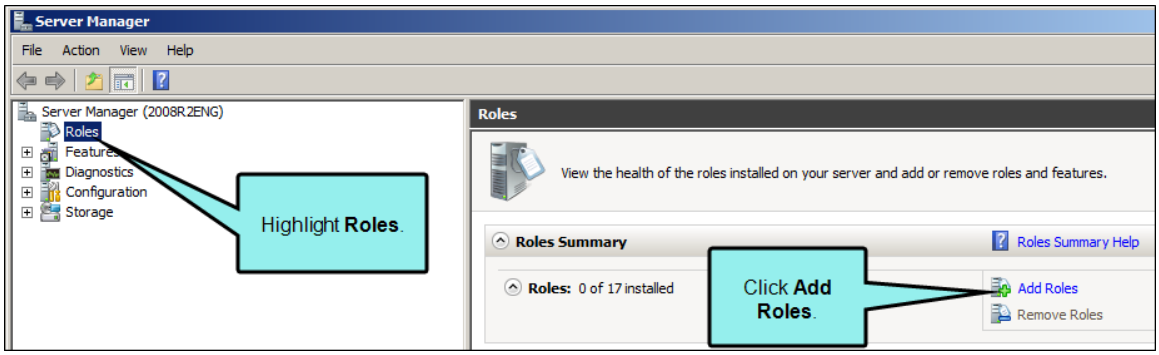
  If IIS is already installed on the server, you can add a new web site in IIS to use with Pulse.

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

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



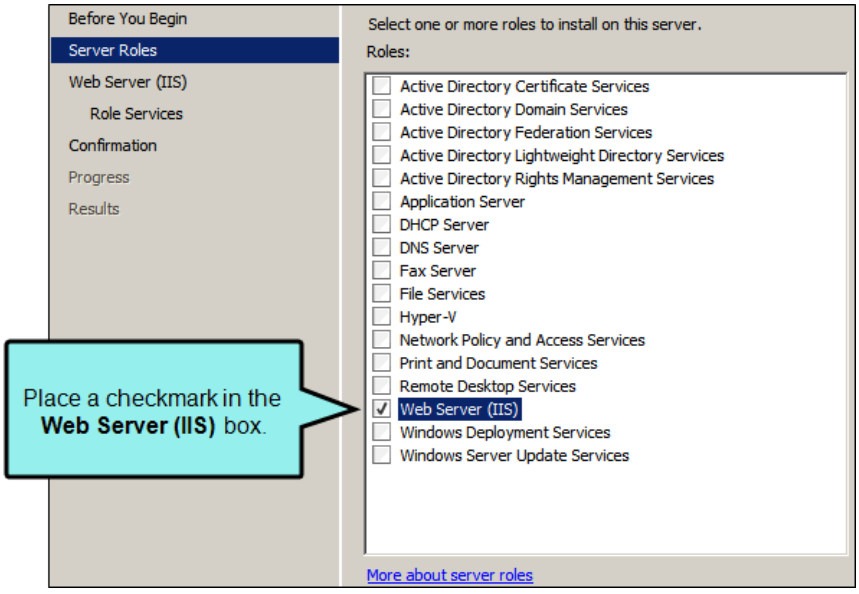
b. In the left-pane under Server Manager, highlight **Roles**. Then in the right-pane under Roles Summary, click **Add Roles**.



The Add Roles wizard opens.

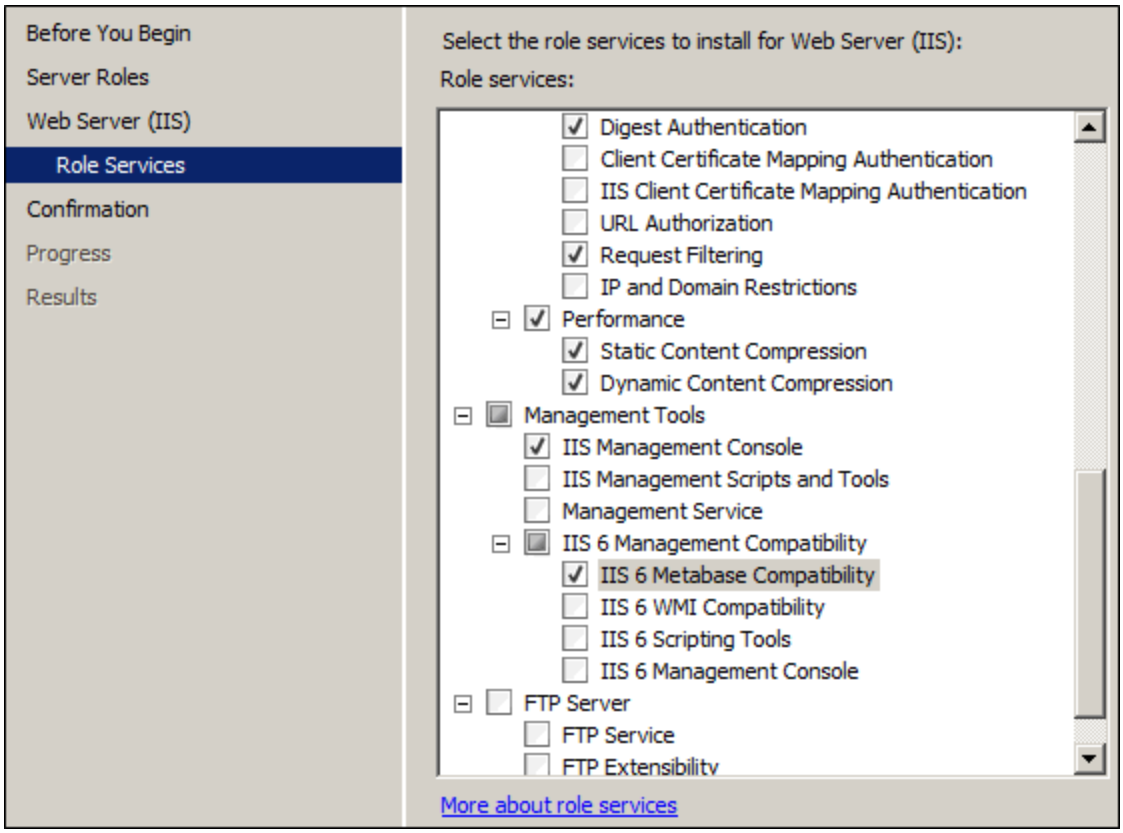
c. In the Before You Begin page, click **Next**

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



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

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



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

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

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

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

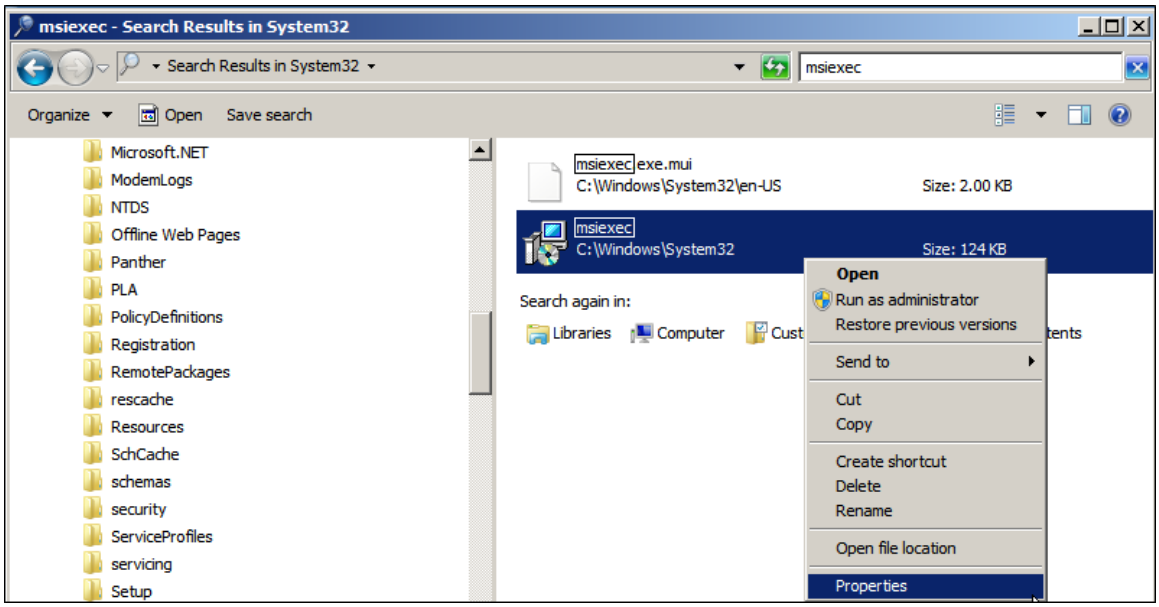
i. Click **Close** to quit the Add Roles Wizard.

HOW TO INSTALL WINDOWS INSTALLER 4.5

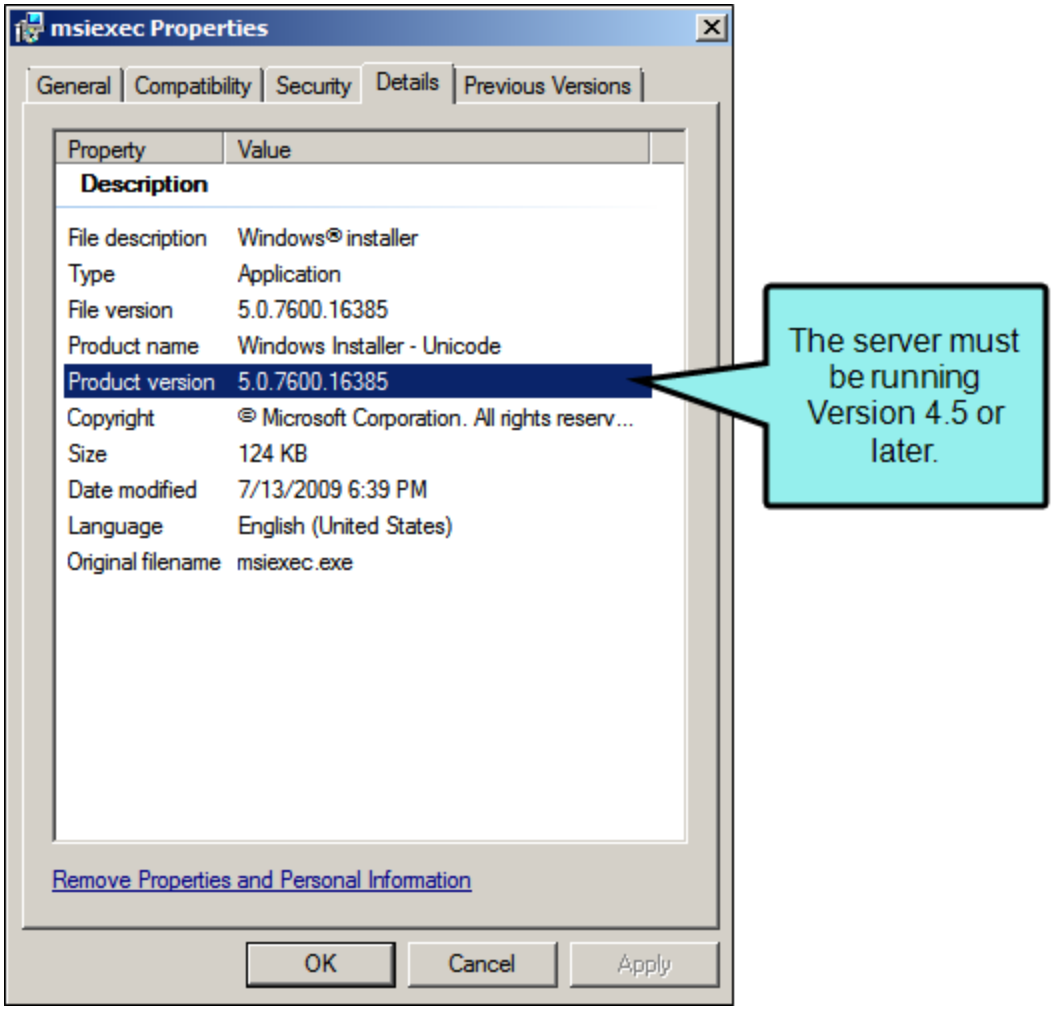
If the server is running Windows Server 2008 *and* if you plan to install Microsoft SQL Server 2008 R2 (Express Edition with Advanced Services), you must download and install the Windows Installer 4.5 Redistributable. Other supported editions of SQL Server do *not* have this requirement.

Run the installation package that is appropriate for your platform.

1. Determine which version of Windows Installer is running on the server that will host your Pulse database:
    a. In Windows Explorer, navigate to the System32 folder. Typically, the path is: C:\Windows\System32.
    b. In the Windows Explorer search field, look for the file named "msiexec.exe."
    c. Right-click the file and select **Properties** from the context menu.



    d. In the Properties dialog, click the **Details** tab.
    e. In the field next to **Product Version**, ensure that your system is running Version 4.5 or higher.



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

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

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

    b. Scroll down the page and click **Install Instructions**. It is recommended that you read the instructions before proceeding.
    c. Click the **Download** button.
    d. In the Choose the Download You Want page, place a check mark next to the appropriate box:
        - **x86 Platform** Windows6.0-KB942288-v2-x86.msu
        - **x64 Platform** Windows6.0-KB942288-v2-x64.msu
        - **IS64 Platform** Windows6.0-KB942288-v2-ioa64.msu
3. Run the installation package that is appropriate for your platform.

WINDOWS POWERSHELL

Windows PowerShell 2.0 can be added via the operating system. You will use the Server Manager to add this feature.

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

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

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

CHAPTER 4

Installing Microsoft SQL Server

Information for Network Administrators

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

This chapter discusses the following:

Before You Begin 33
Installing SQL Server 34

Before You Begin

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

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

  OR

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

Installing SQL Server

You must install a supported version of Microsoft SQL Server:

- Microsoft SQL Server 2012
- Microsoft SQL Server 2008R2
- Microsoft SQL Server 2008

You can use a full or express version of any of these, but the full version is recommended because it can store more data.

Regardless of your operating system (Windows Server 2012, 2008R2, or 2008), you should be able to use any of the versions of Microsoft SQL Server listed above. Following are general steps for all three. For the most part, the steps are identical for each, though there may be some minor variations.

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

> IMPORTANT: If you are running Windows Server 2012 or are installing Microsoft SQL Server 2012, be sure you have the most current version of Pulse. Microsoft SQL Server 2012 and Windows Server 2012 are not compatible with earlier versions of Pulse.

HOW TO INSTALL MICROSOFT SQL SERVER

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

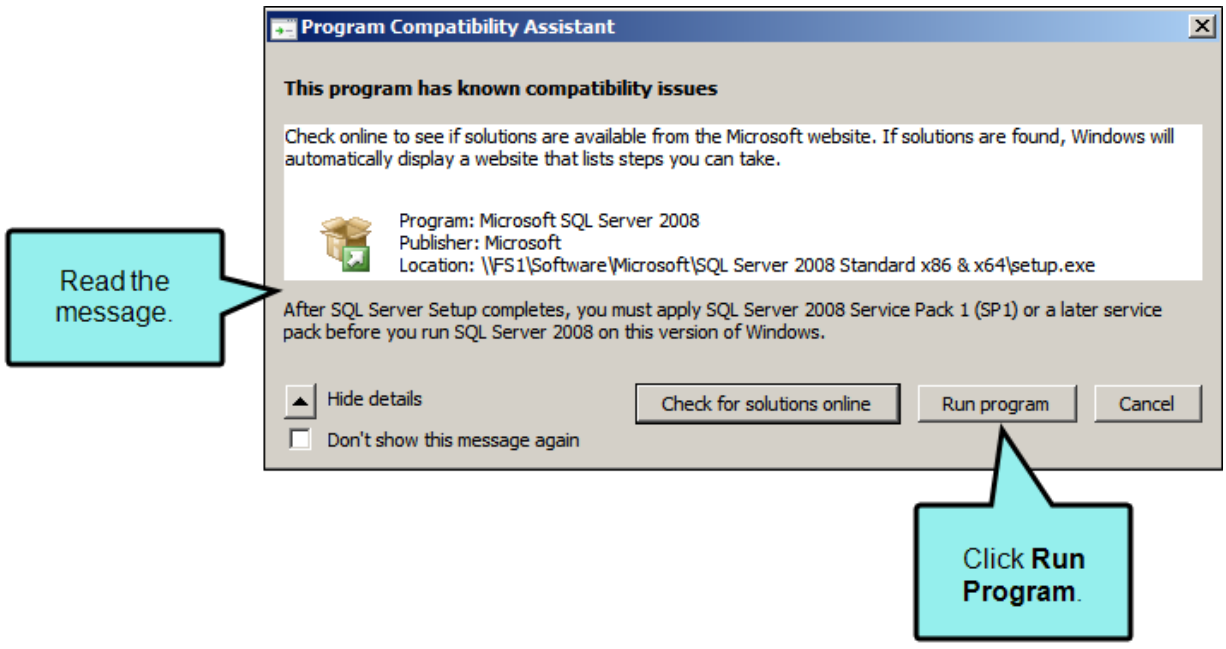
   ### IF YOU ARE INSTALLING FROM A NETWORK

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

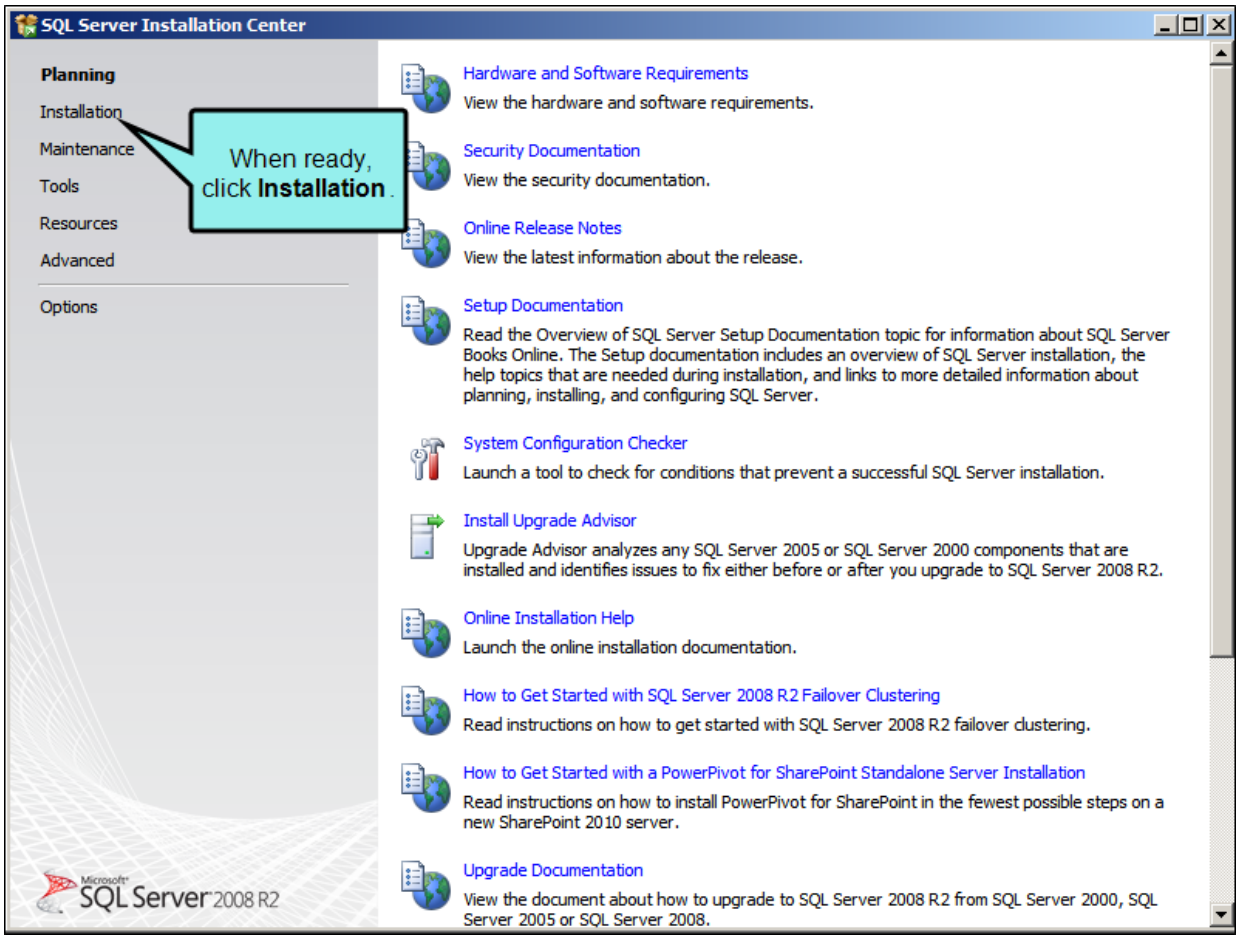
   If prompted by Windows User Account Control message asking if you want to allow the program to make changes to this computer, click **Yes**.

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

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

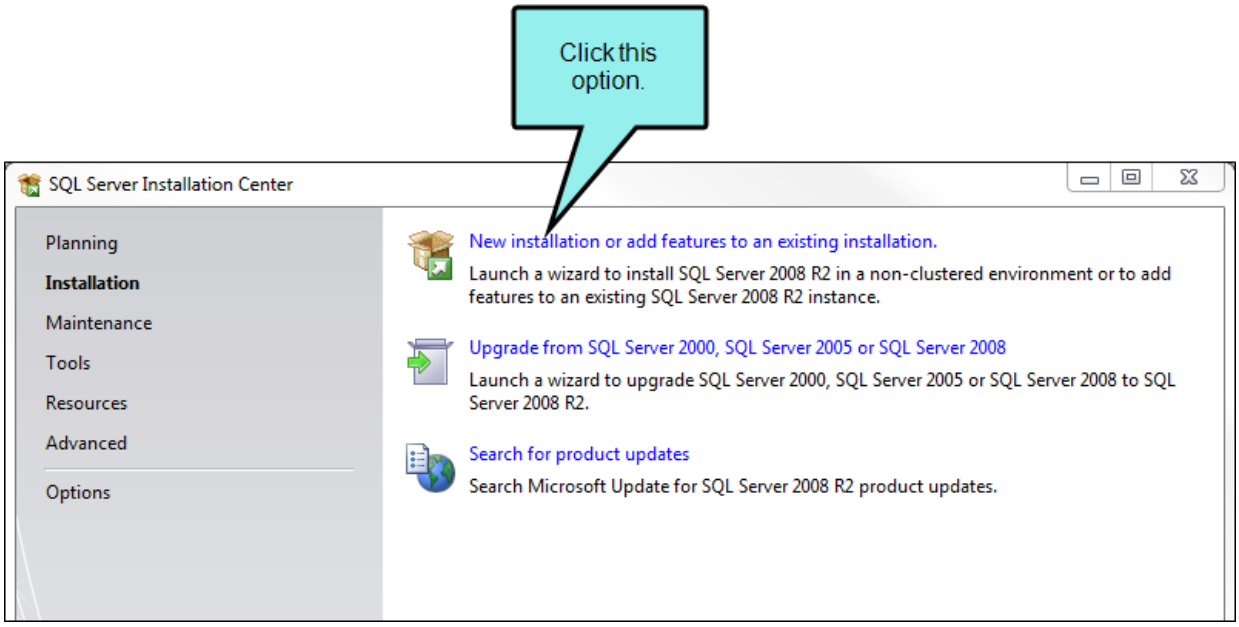


5. In the Planning page of the Installation Center, review the information. When ready to proceed, click **Installation** in the left pane.



6. For SQL Server 2008 R2 In the Installation page, click the **New installation or add features to an existing installation** option.

   For SQL Server 2008 and 2012 In the Installation page, click the **New SQL Server stand-alone installation or add features to an existing installation** option.



   If a dialog opens with a security warning, click **Run**.

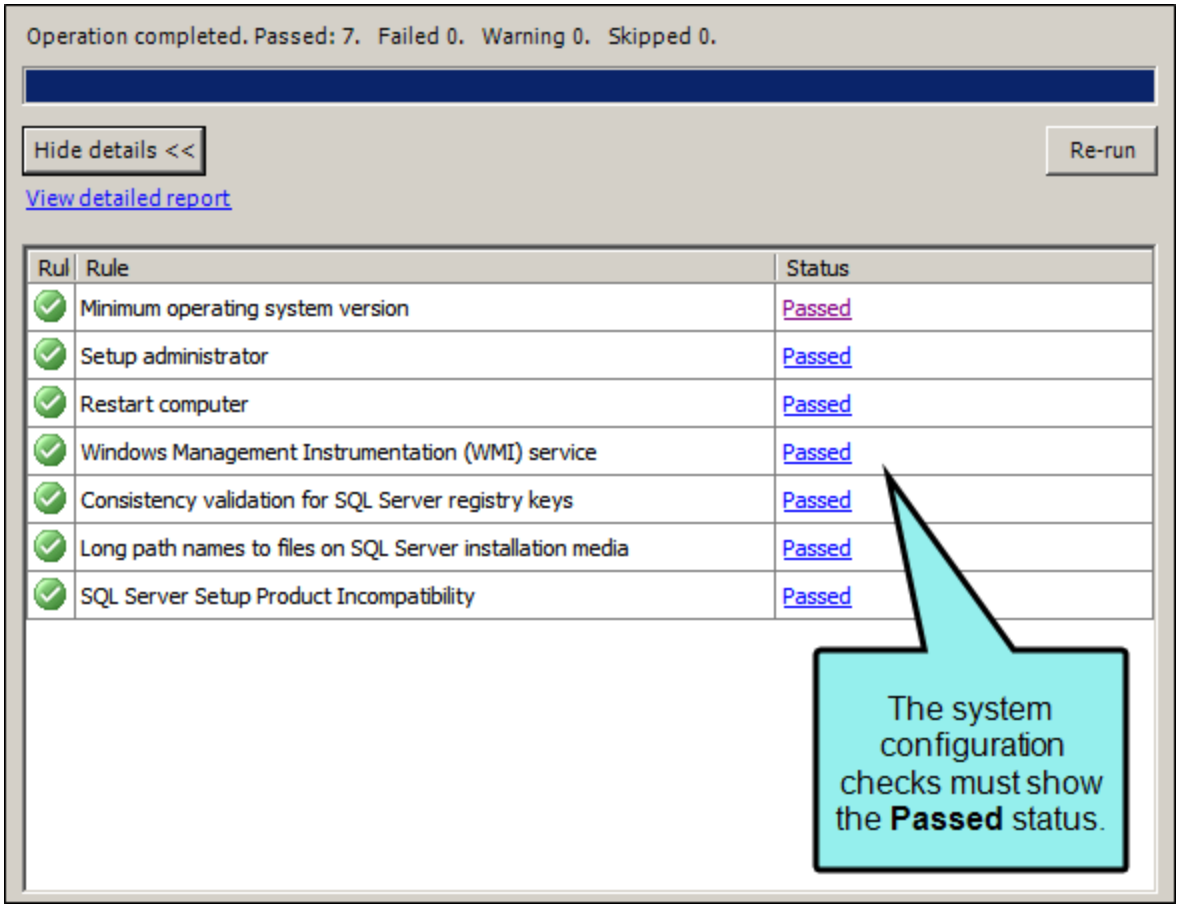
   The wizard checks the system to detect potential issues.

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

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

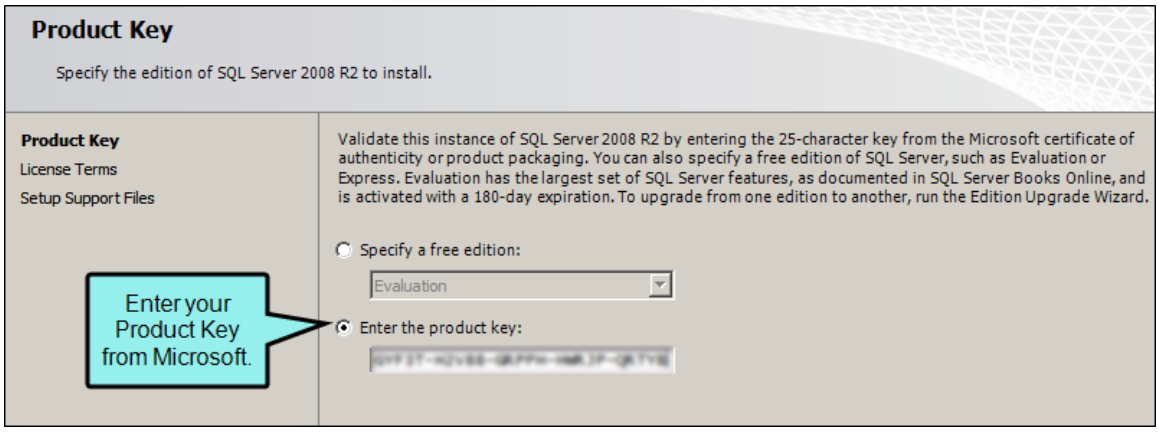
     OR

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



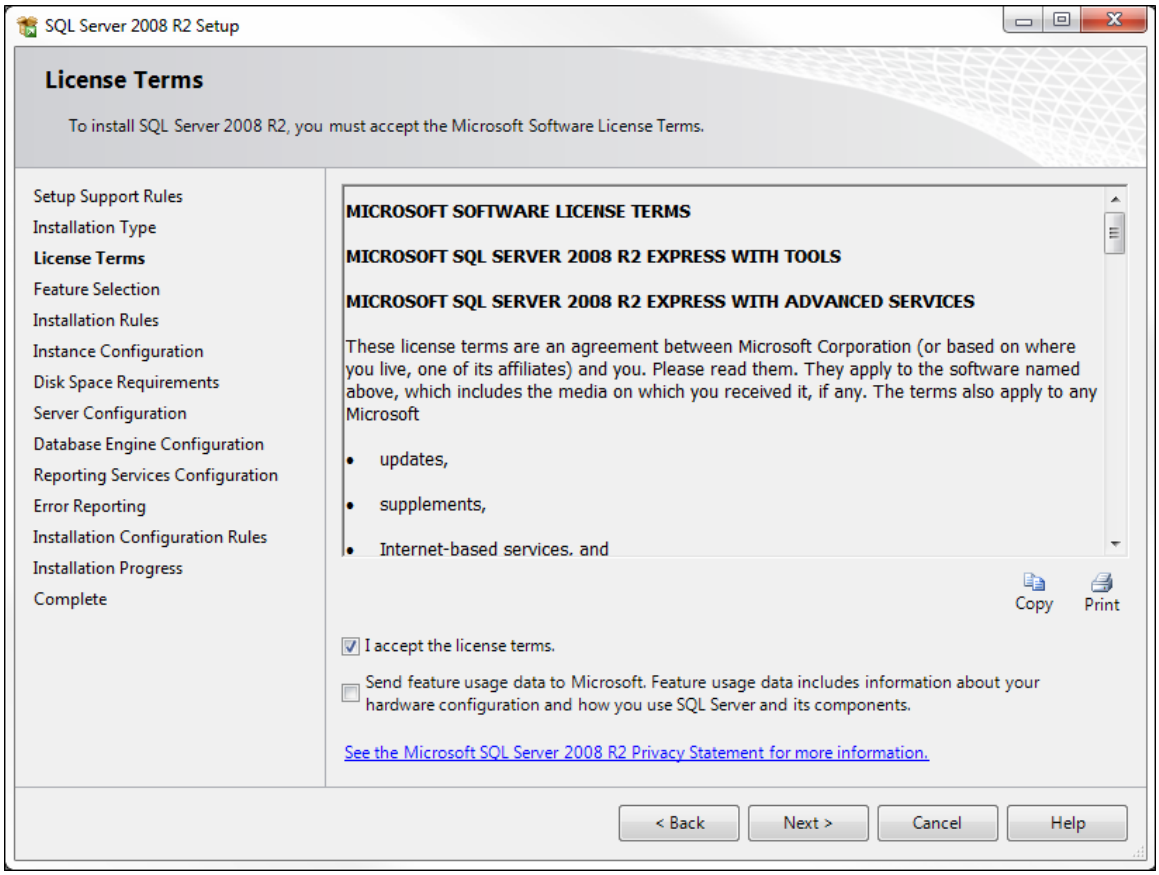
The wizard ensures that you have a valid product key.

8. In the Product Key page, validate the SQL Server instance:
    a. In the Product Key page, select the **Enter the product key** option.
    b. Type your Microsoft license key in the box.



    c. Click **Next** to open the License Terms page.
    d. Place a check mark in the **I accept the license terms** box.

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

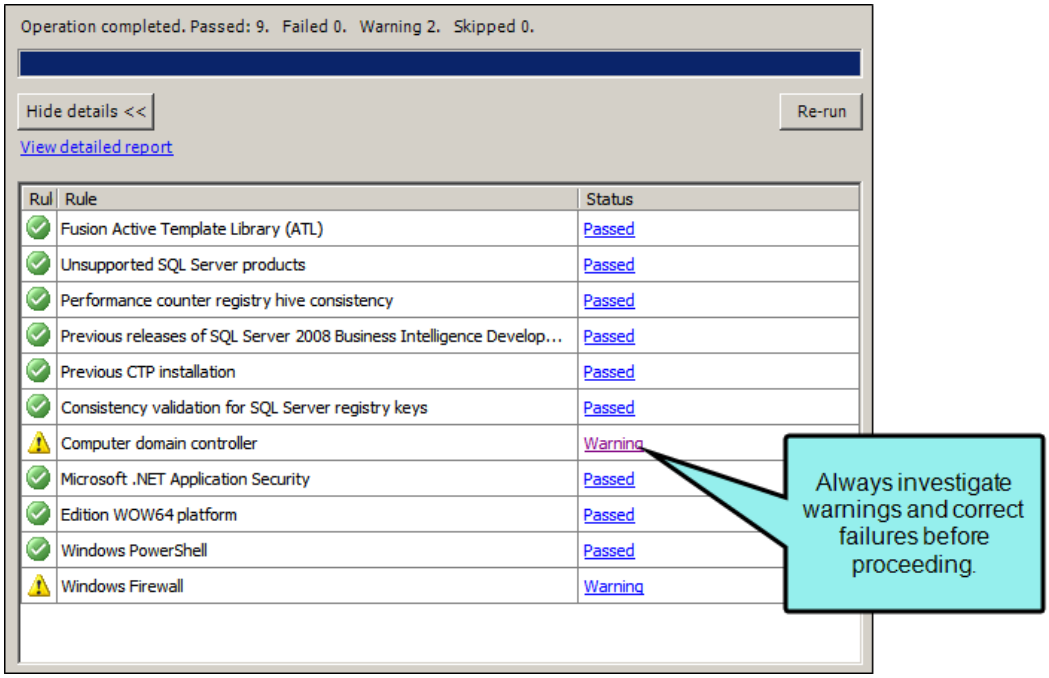


f. Click **Next**. (If your system requires updates, you may see a page at this point showing available updates. You can click the check box to include updates in the installation and click **Next**.)

g. Depending on the version of SQL Server, you may need to click **Install** at this point. The setup program performs a system check to detect potential issues.

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

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



   OR

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

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

HOW TO INSTALL THE MINIMUM REQUIRED FEATURES

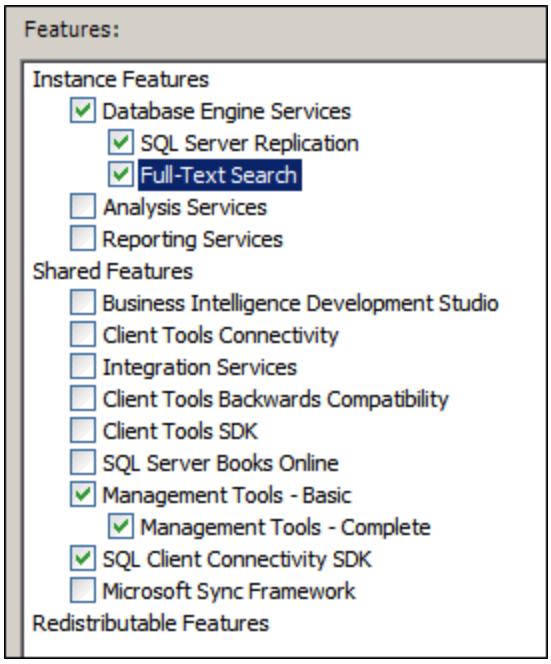
At a minimum, you should:

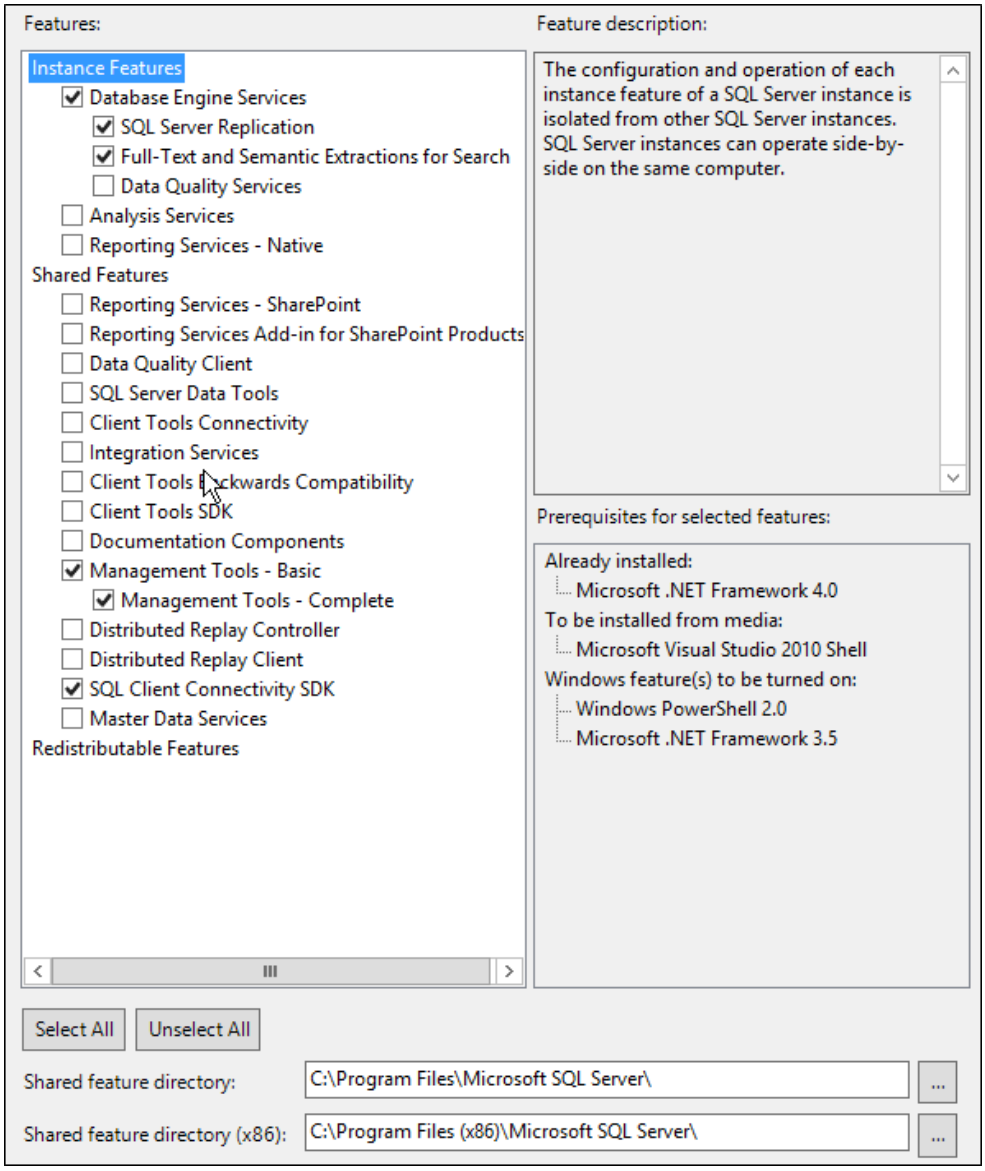
Use the default shared feature directory.

a. Select these check boxes:

- **Database Engine Services**
  - **SQL Server Replication**
  - **Full-Text Search** or **Full-Text Search and Semantic Extractions for Search**
- **Management Tools - Basic**
  - **Management Tools - Complete**
- **SQL Client Connectivity SDK**

SQL SERVER 2008/2008R2 EXAMPLE





b. Use the default shared feature directory.

c. Click **Next**.

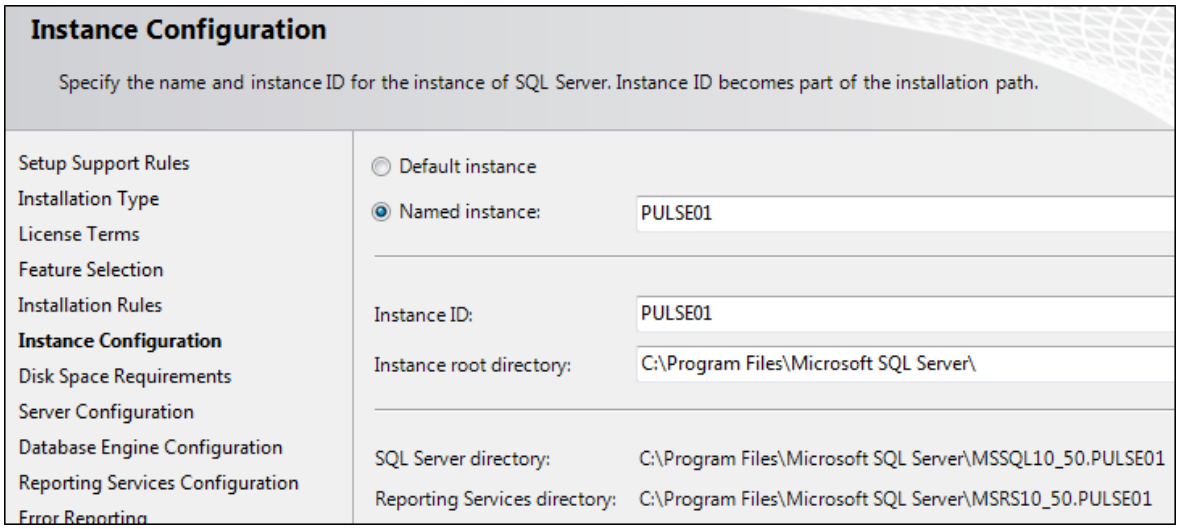
The setup program checks the system for potential issues.

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

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

  OR

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



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

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

      OR

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

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

HOW TO PROVISION SQL SERVICE ACCOUNTS

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

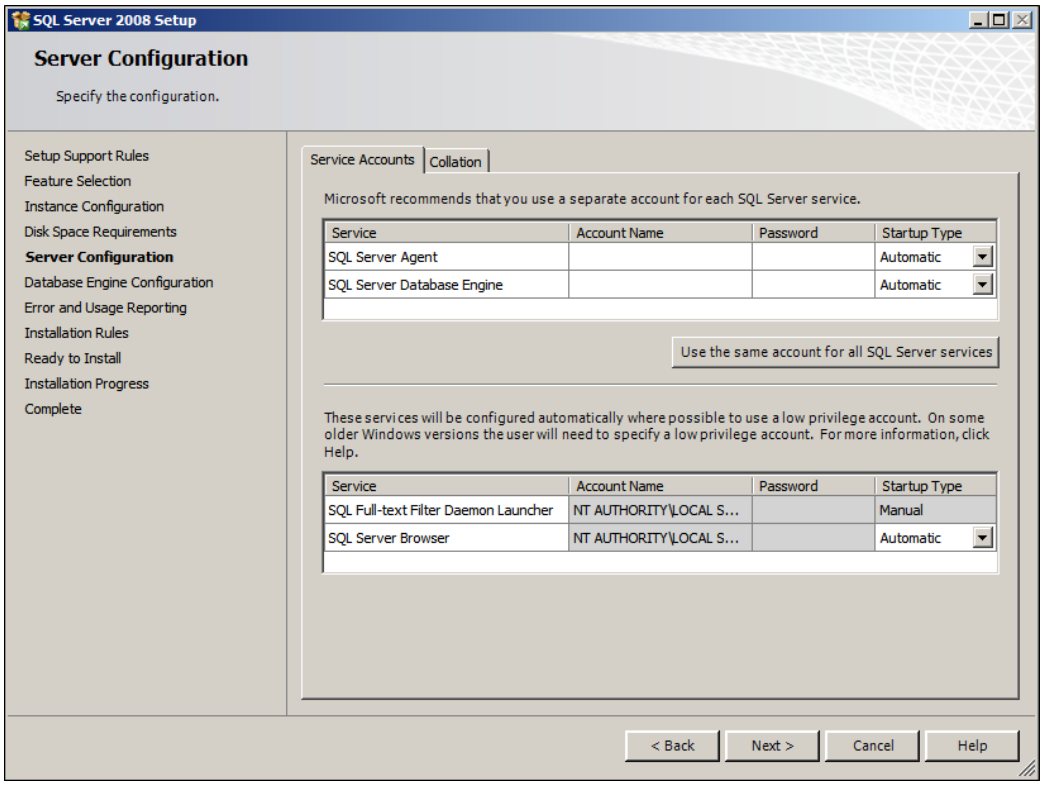
a. Provision the appropriate accounts to the list of SQL services.

b. Make sure the **Startup Type** for each service is set as follows, depending on the version of SQL Server:

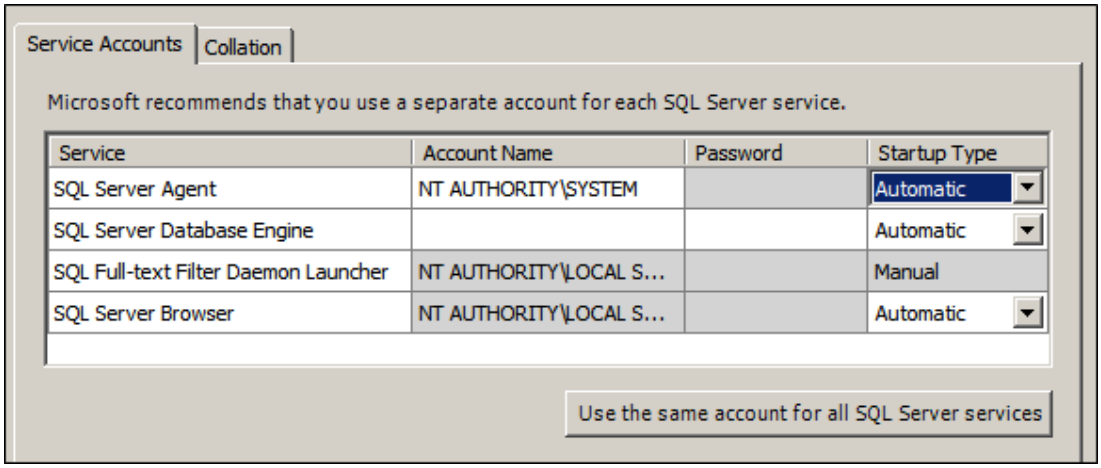
Service	Account Name/Password	Startup Type
SQL Server Agent	SQL Server 2008/2008R2 There is no default account for this service. The account you use depends on your security requirements. SQL Server 2012 This account defaults to NT Service\SQLAGENT$[Name of Instance]. There is no default account for this service. The account you use depends on your security requirements.	Automatic
SQL Server Database Engine	SQL Server 2008/2008R2 The account you use depends on your security requirements. SQL Server 2012 This account defaults to NT Service\MSSQL$[Name of Instance]. The account you use depends on your security requirements.	Automatic

Service	Account Name/Password	Startup Type
SQL Full-text Filter Daemon Launcher	SQL Server 2008/2008R2 This account defaults to NT AUTHORITY\LOCAL SERVICE. The account you use depends on your security requirements. Microsoft recommends using a low privilege account. SQL Server 2012 This account defaults to NT Service\MSSQLFDLauncher$[Name of Instance].	Manual
SQL Server Browser	The default logon account is NT AUTHORITY\LOCAL SERVICE. You will typically keep this setting.	Automatic

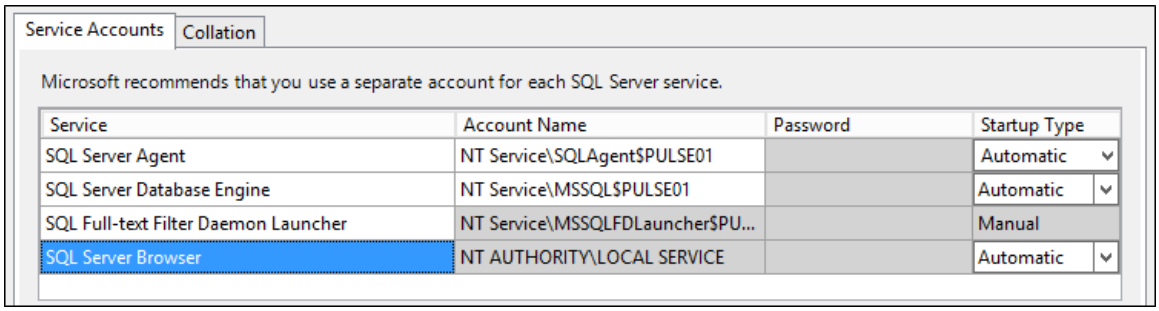
SQL SERVER2008 EXAMPLE



SQL SERVER 2008R2 EXAMPLE



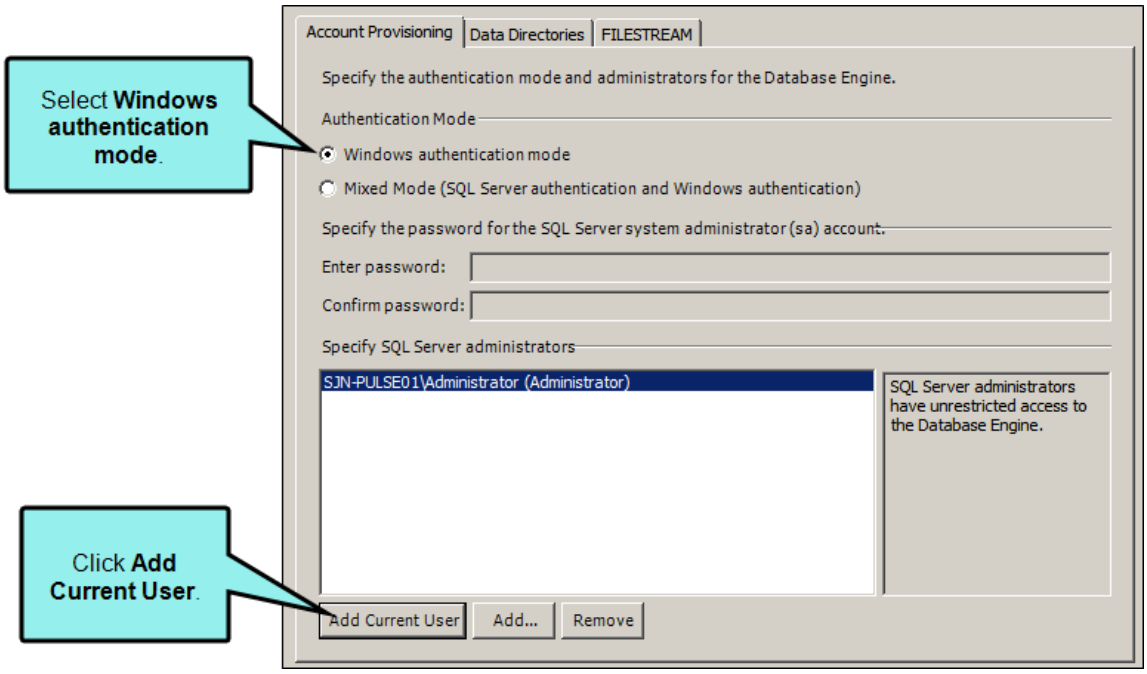
SQL SERVER 2012 EXAMPLE



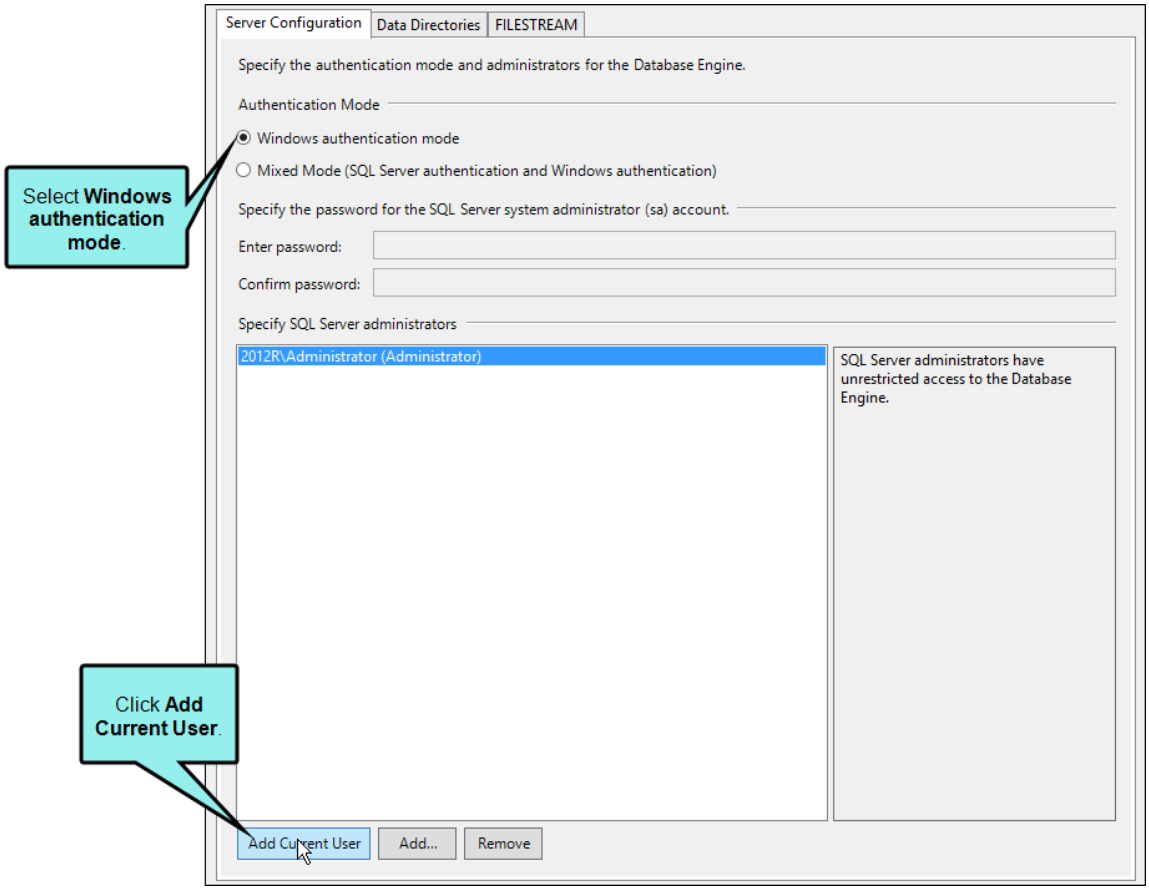
14. In the Database Engine Configuration page, under the **Account Provisioning** tab (SQL Server 2008/2008 R2) or the **Server Configuration** tab (SQL Server 2012), choose one of these options:

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

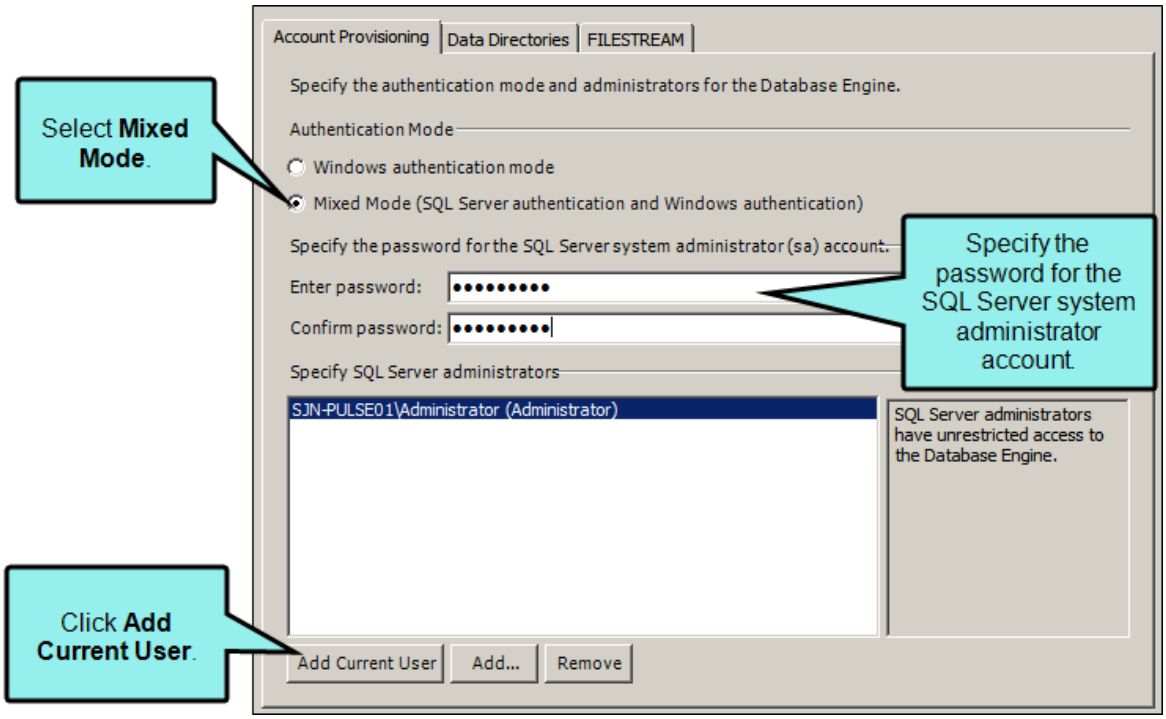
      SQL SERVER 2008/2008R2 EXAMPLE



SQL SERVER 2012 EXAMPLE



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



When finished, click **Next**.

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

      OR

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

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

> NOTE: You may also want to check with your SQL Server Administrator about any errors you experience during installation.

CHAPTER 5

Installing and Activating Pulse

Information for Network Administrators

After preparing the Pulse web server and database server for the installation process, you can install Pulse.

This chapter discusses the following:

List of Pulse Components 53
List of Windows Service Applications 54
Installing the Pulse Server Application 55
Activating Pulse 61

List of Pulse Components

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

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

List of Windows Service Applications

Pulse runs the following Windows service applications:

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

Installing the Pulse Server Application

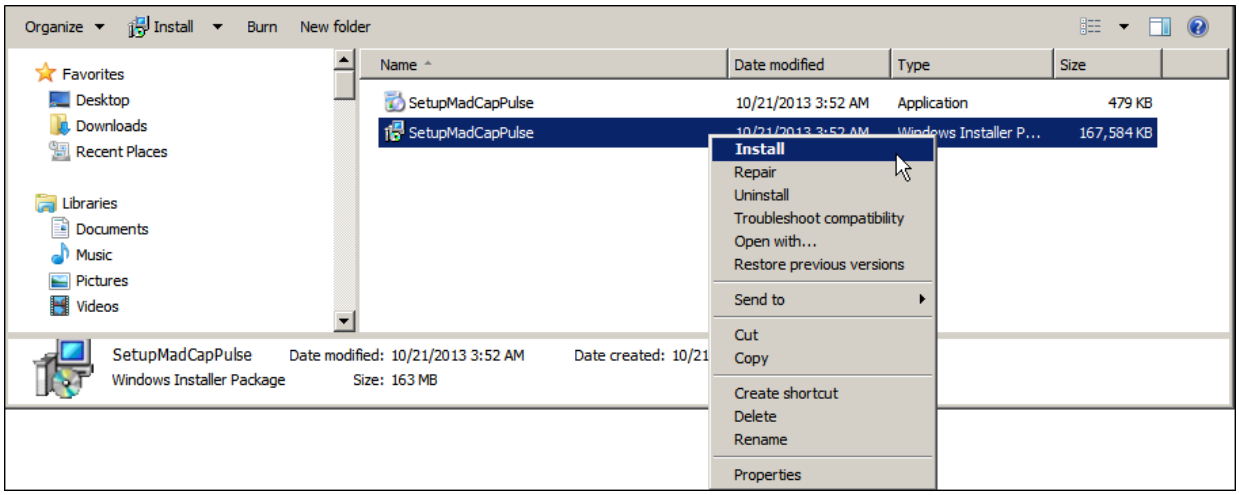
Do the following on the web server (this is the server running IIS):

HOW TO INSTALL THE PULSE SERVER APPLICATION

1. Install the prerequisite software.See "Installing the Prerequisites" on page 18.
2. Install a Microsoft SQL Server instance for the Pulse database. See "Installing Microsoft SQL Server" on page 32.
3. Obtain the installation media and a license code from MadCap Software:
   - **CD** Insert the installation CD.
   - **Online** Download the setup program using the link that you received from MadCap Software. .

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

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



IF YOU ARE NOT LOGGED IN AS AN ADMINISTRATOR

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

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

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

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

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

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

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

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

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

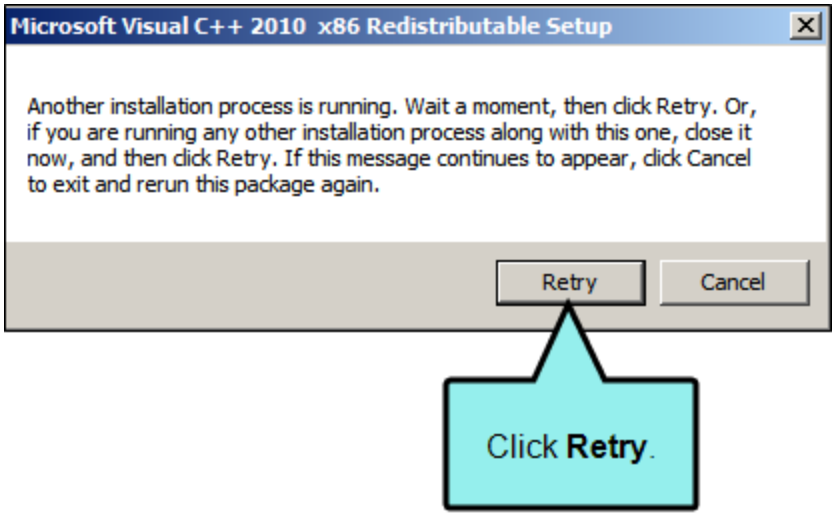
IF YOU ARE PROMPTED TO INSTALL THE VISUAL C++ 2010 REDISTRIBUTABLE

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

In the Trial/Activation dialog, do one of the following in the Provide Your License Code field:

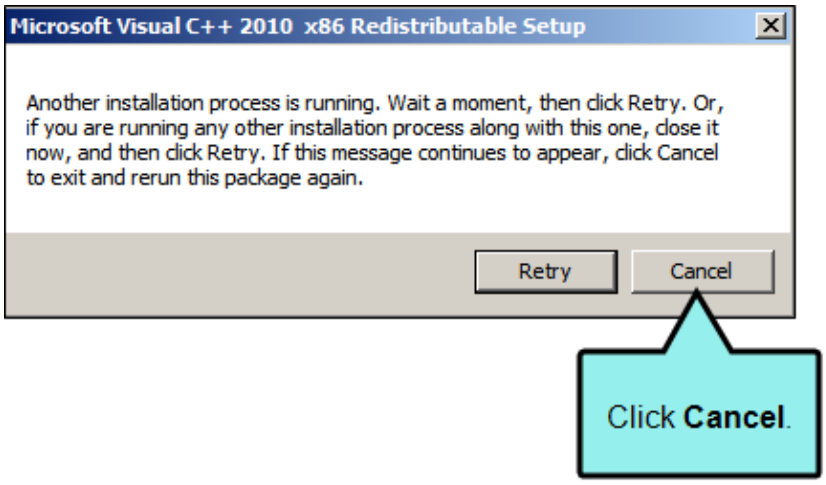
a. Place a check mark in the I have read and accept license terms box. Then click Install. A progress indicator appears to show you the status.

b. If the following message appears, click Retry.



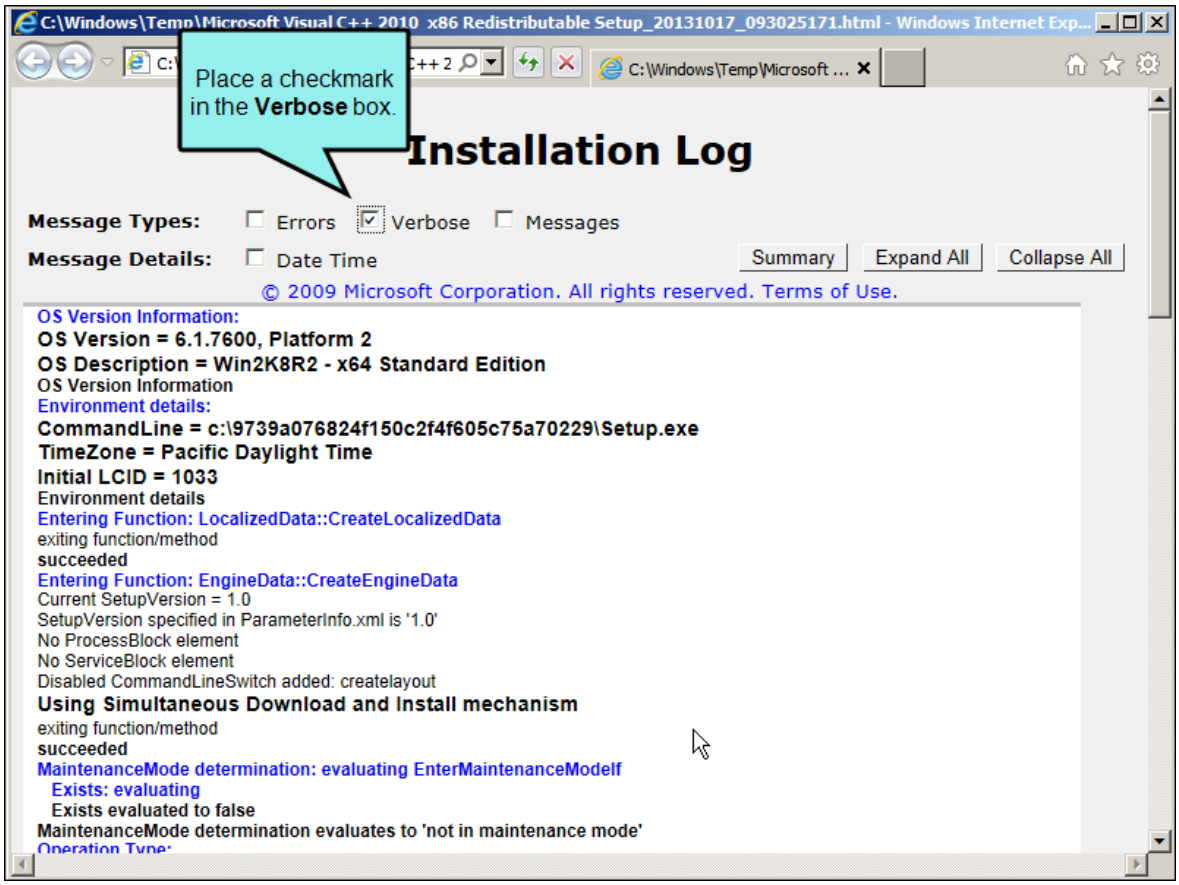
c. Depending on your system, one of the following occurs:

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

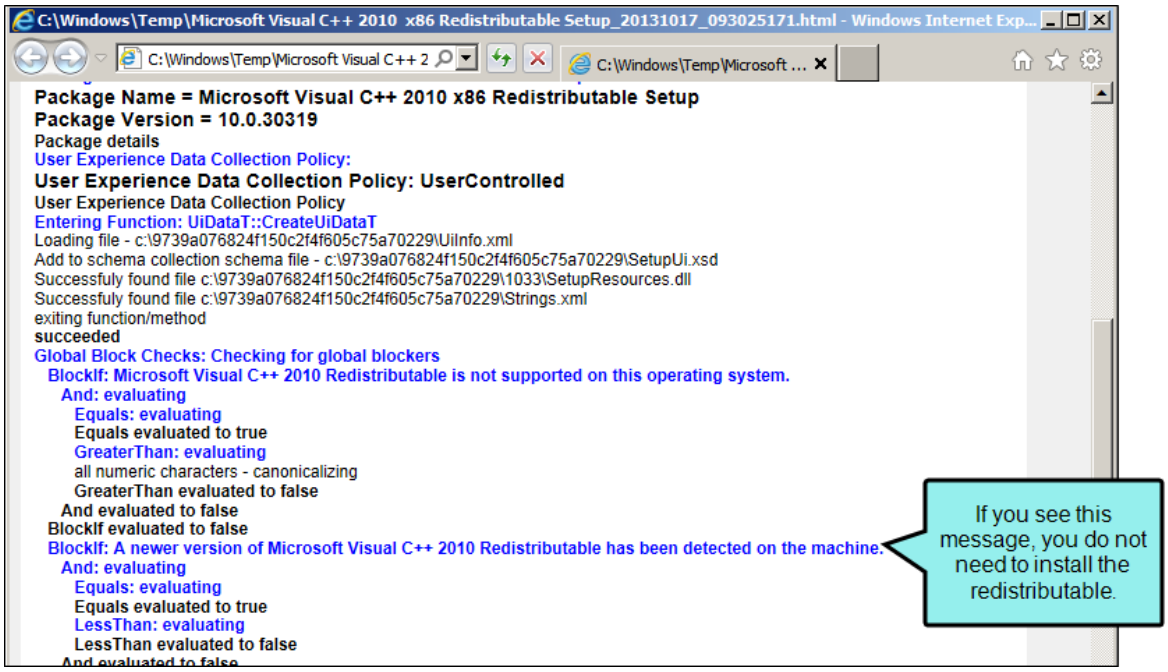


d. In the Installation Did Not Succeed dialog, click the **log file** link.

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



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



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

g. Close the Installation Log.

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

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

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

Activating Pulse

After successfully installing Pulse, you must activate the product.

HOW TO ACTIVATE PULSE

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

   ### HOW TO LAUNCH THE PULSE SERVER APPLICATION

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

     OR

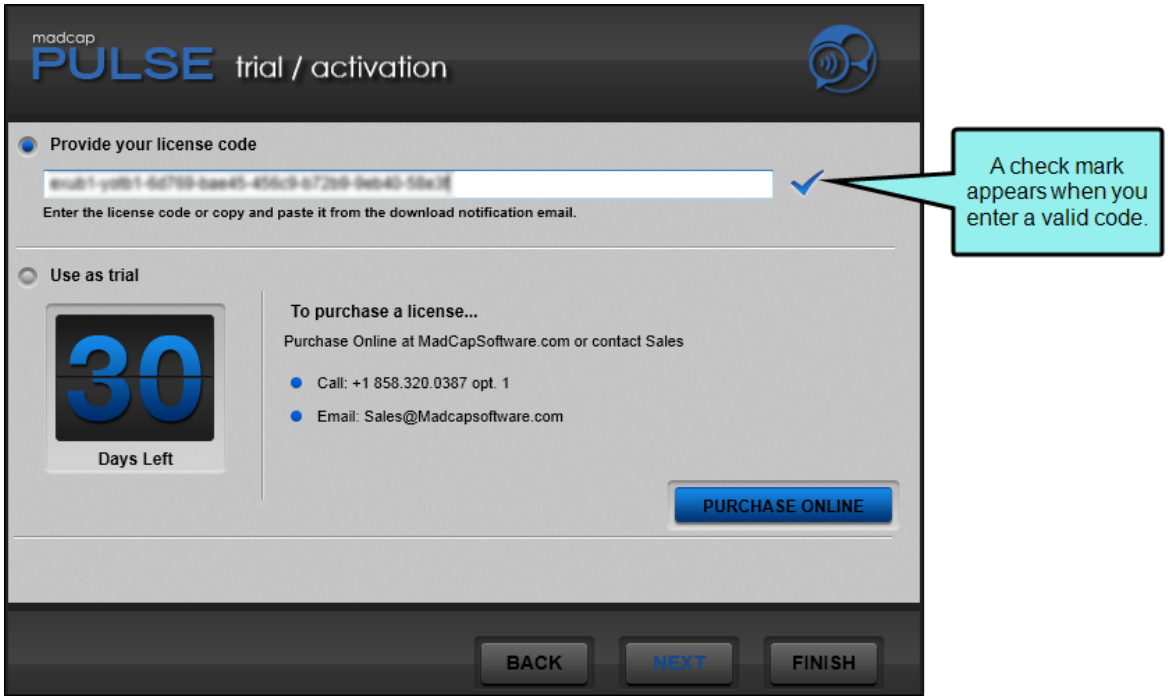
   - On 64-bit Systems Double-click the Pulse.exe file. The path to this file is C:\Program Files\MadCap Software\MadCap Pulse\Pulse.app\Pulse.exe.

     OR

   - On 32-bit Systems Double-click the Pulse.exe fie. The path to this file is C:\Program Files (x86)\MadCap Software\MadCap Pulse\Pulse.app\Pulse.exe.

3. In the Trial/Activation dialog, do one of the following in the **Provide Your License Code** field:
   - Type the license code that you received from MadCap Software.

     OR
   - Copy the license code from your download notification email and paste it into the field. A check mark appears when you enter a valid code.



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

7. Select the desired activation method:
   - Internet Activation If you are connected to the Internet, select this option. If you are behind a firewall, you may need to enter your Proxy Server information.

     ### HOW TO ACTIVATE WITH A PROXY SERVER

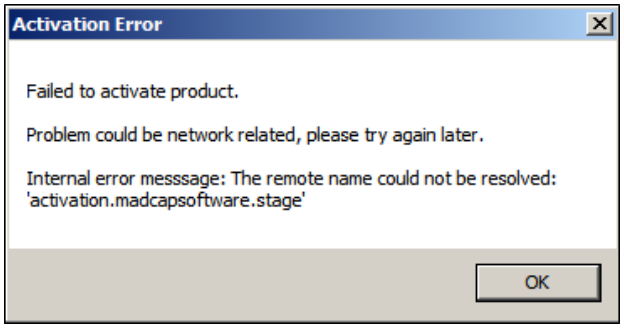
     a. If you are behind a firewall, place a check mark in the Use Proxy Server box:
     b. Enter the required proxy server and authentication information for your network.
     c. Click Next.

     OR
   - Manual Activation To activate by email, select this option. Then enter the license code and machine ID.
8. Click Next.
9. Copy and paste the activation code included in the email that was sent to the provided address.
10. Click Next.

    The system activates your product.

    ### IF YOU ENCOUNTER ACTIVATION ISSUES

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



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

    - Entering an Invalid License Code Try re-entering your code to make sure it was typed correctly. If you have purchased other MadCap products, make sure the code you typed is

for the Pulse product.

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

The Welcome page of the Pulse Configuration Wizard appears so you can configure Pulse for first time use. See "Pulse Server Configuration" on page 65.

CHAPTER 6

Pulse Server Configuration

AVAILABLE TO: Administrators only

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

This chapter discusses the following:

Configuring Pulse for the First Time 66
Starting the Pulse Server Application 75
Setting the PulseAdmin Password 76
Pulse Server Configuration Window 77
Importing Feedback Data 86
Updating Pulse 87
Uninstalling Pulse 88

Configuring Pulse for the First Time

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

HOW TO CONFIGURE PULSE FOR FIRST TIME USE

1. Install and activate Pulse as described in "Installing and Activating Pulse" on page 52.
2. If the MadCap Pulse Configuration Wizard is not already open, double-click the MadCap Pulse desktop shortcut.
3. In the Welcome page of the MadCap Pulse Configuration Wizard, click **Next**.
4. In the Select Web Site page, do the following:
    a. **Select the Website for the Pulse Services** Select the website on the IIS Server that will be storing your Pulse data. By default, Pulse will use the "Default Web Site" in IIS.
    b. **Pulse Server URL** This is the Site URL for the Pulse dashboard. Typically, it will consist of the protocol (http:// or https://), the IP address (or the machine name), and the Pulse directory.

        ☆ EXAMPLES

        HTTP:

        http://<ipaddress>/pulse

        http://<servername>/pulse

        Secure HTTP:

        https://<ipaddress>/pulse

        https://<servername>/pulse

    c. Click **Next**.

5. In the Select SQL Server page, do the following:
    a. In the **SQL Server** drop-down list, select **Get list of SQL Servers**.

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

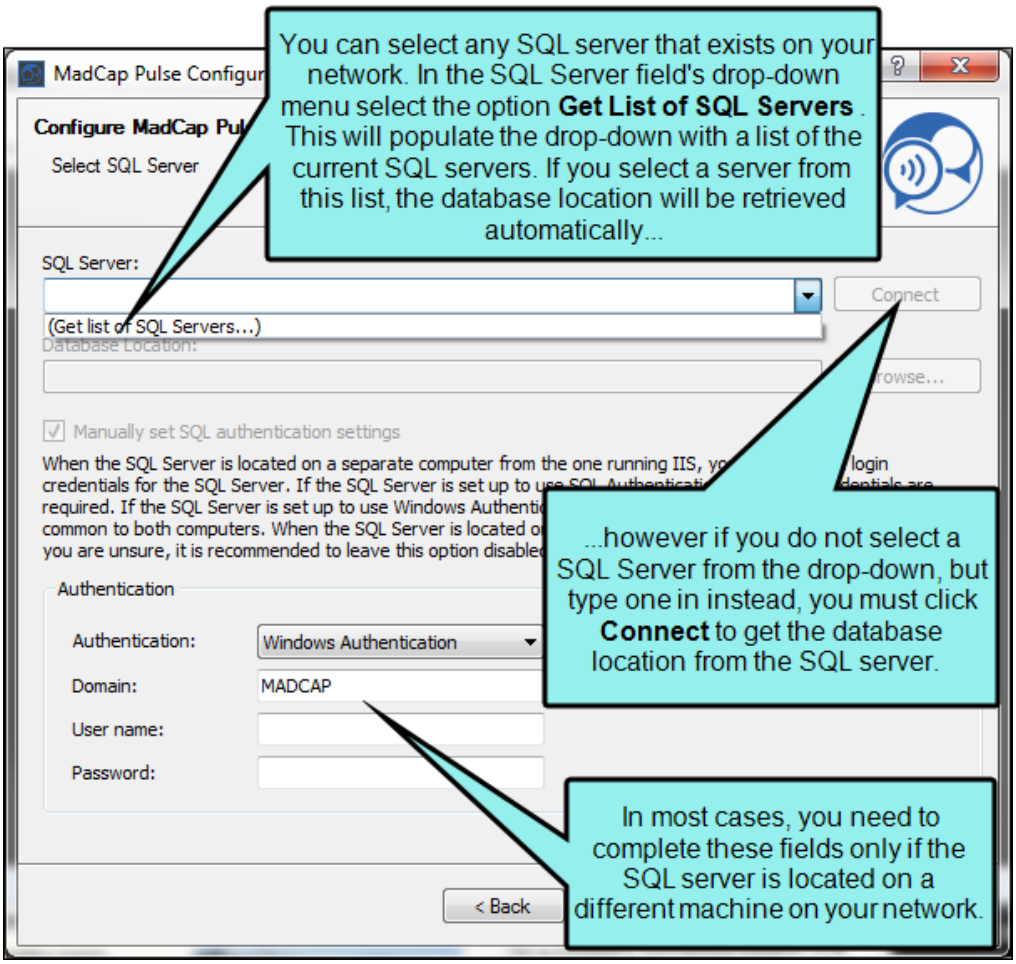
       ### HOW TO TURN ON THE SQL SERVER BROWSER

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

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

    b. In the SQL Server drop-down list, select the desired server. If instead you enter a server manually, click **Connect**.

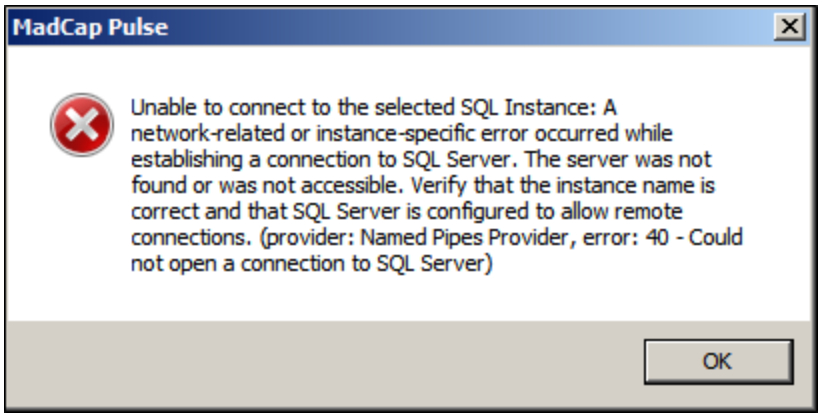
NOTE: You can alternatively enter the IP Address or Computer Name of the server in the **SQL Server** field. Use this format: `<Server Name>\<SQL Instance>` or `<IP Address>\<SQL Instance>`



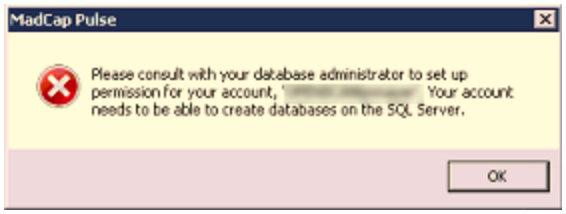
IF YOU ENCOUNTER A CONNECTION FAILURE

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

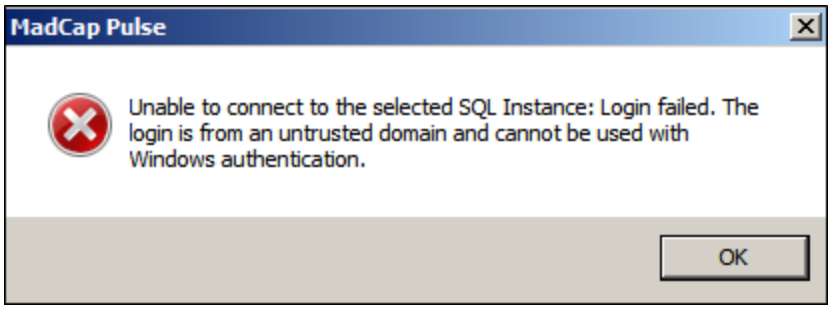
- The SQL Server name and/or instance was entered incorrectly. You must enter the correct server name and instance.



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



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



c. If necessary, complete the authentication fields at the bottom of the page.

d. Click **Next**.

6. In the Database Options page, select one of the following options:

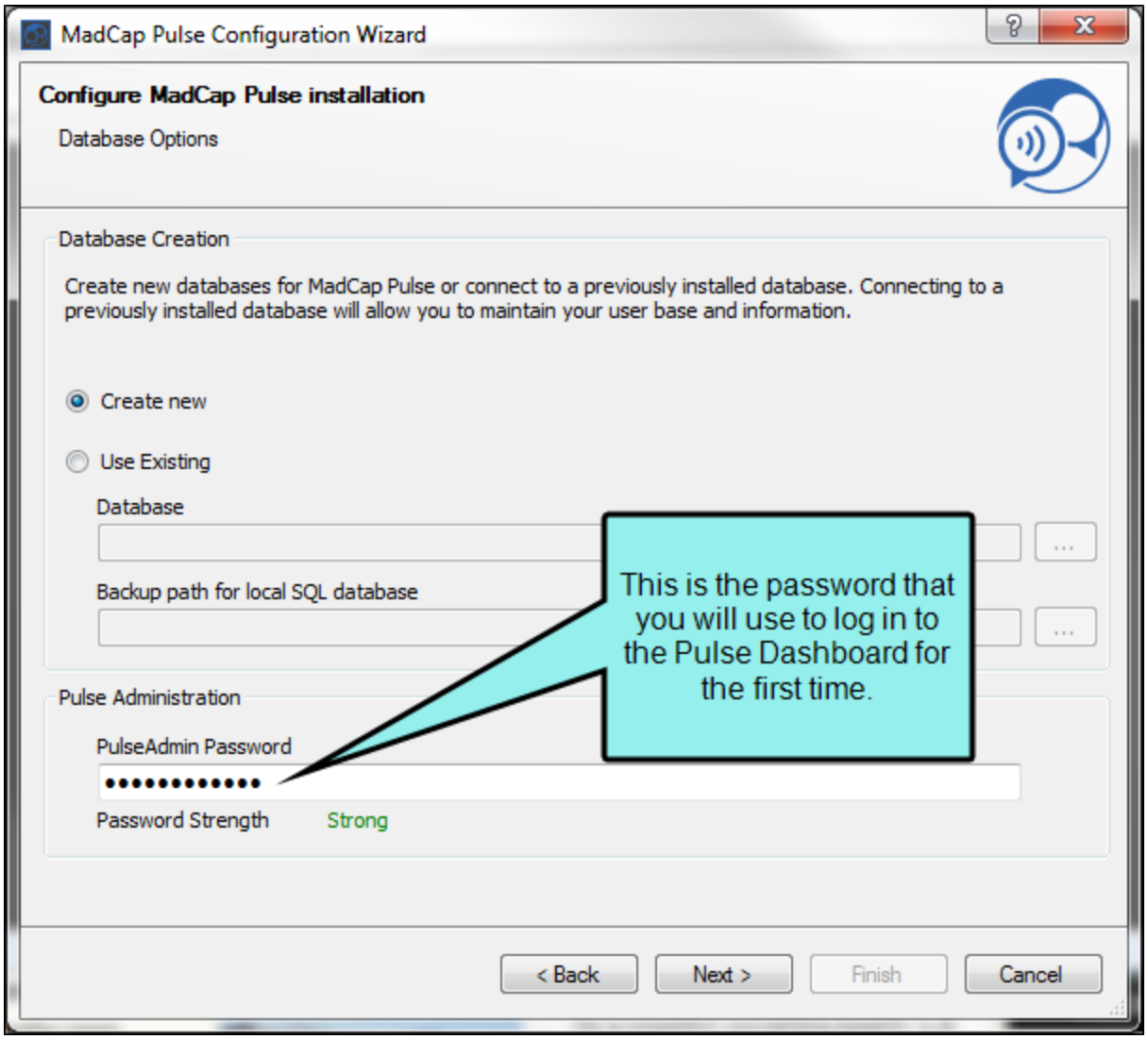
   - **Create new** This creates a new database instance with Pulse.

     OR

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

7. If necessary, in the **Backup path for local SQL database** field, you can click the browse button and choose a location to store a copy of the current database. This field is only enabled if the database has been using a previous version of Pulse. Also, it is not enabled if you are connecting to a database on a remote server.

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



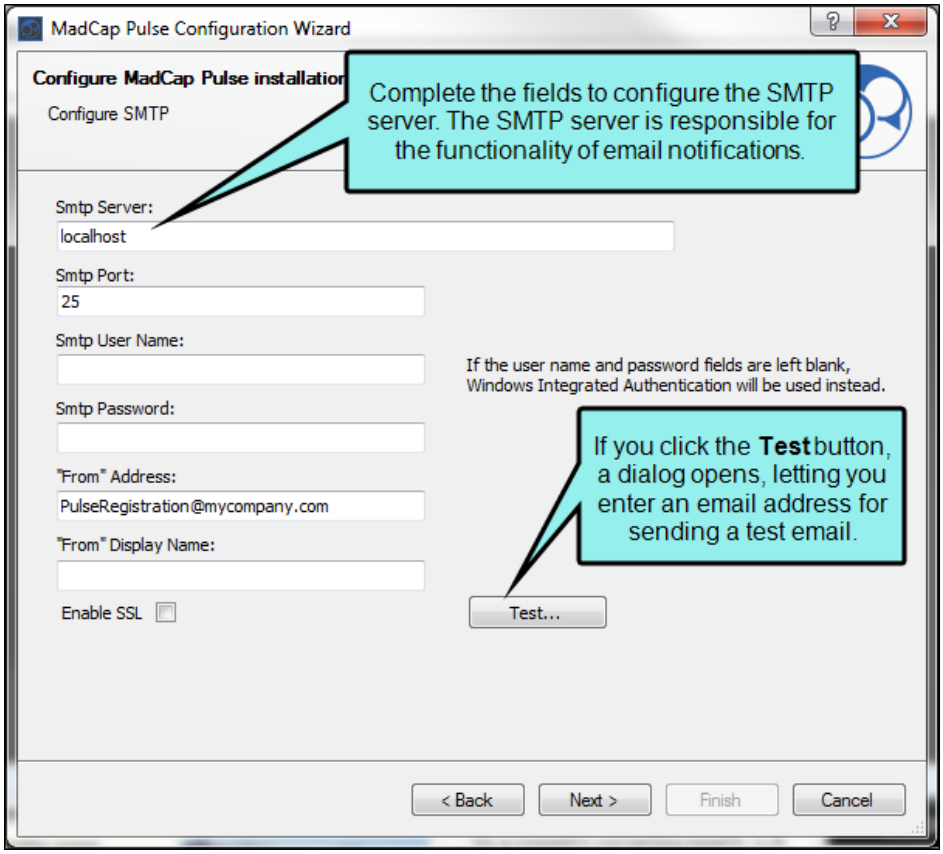
IMPORTANT: Record this password in a safe place. This is the default PulseAdmin account. You will need this information to log into the Pulse dashboard for the first time.

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

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

NOTE: To get your SMTP server settings, see your Email or Network Administrator.

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



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

10. (Optional) Test your SMTP settings.

    a. In the Configure SMTP dialog, click **Test**.

    b. In the SMTP Test dialog, enter a valid address in the **Email address** box.

    c. Click **Send Test Email**.

    d. Depending on which message you see, do the following:

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

11. Click **Next**. The Verify Configuration page appears.
12. In the Verify Configuration page, review the components list. When you are ready to proceed, click **Next**. A progress indicator shows you the status of the installation.
13. When the Configuration Complete page appears, you can click **View Log** or **Save Log** if you want to see or save the results.
14. Click **Finish**.

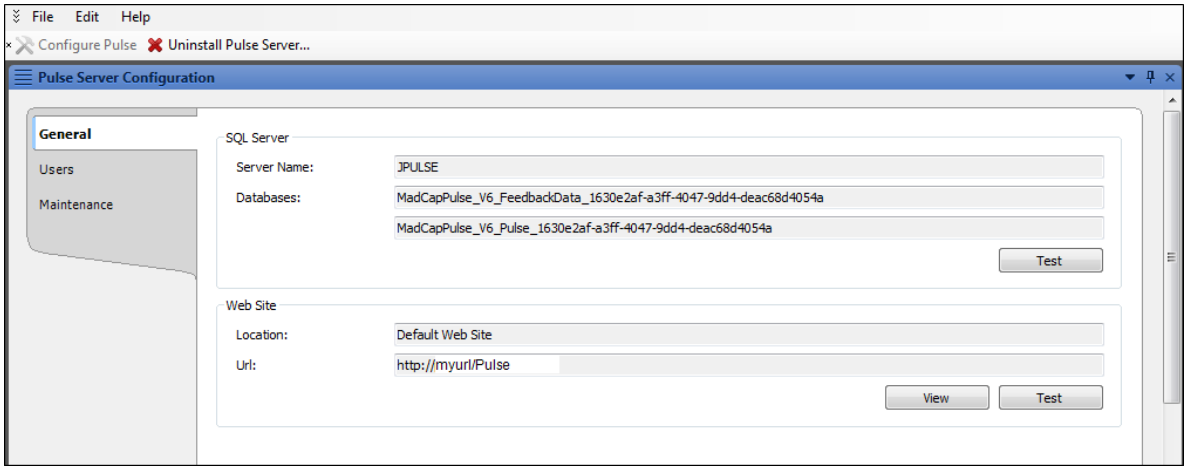
Starting the Pulse Server Application

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

HOW TO START THE PULSE SERVER APPLICATION

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

Here is the Pulse Server Configuration window:



Setting the PulseAdmin Password

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

HOW TO SET THE PULSEADMIN PASSWORD

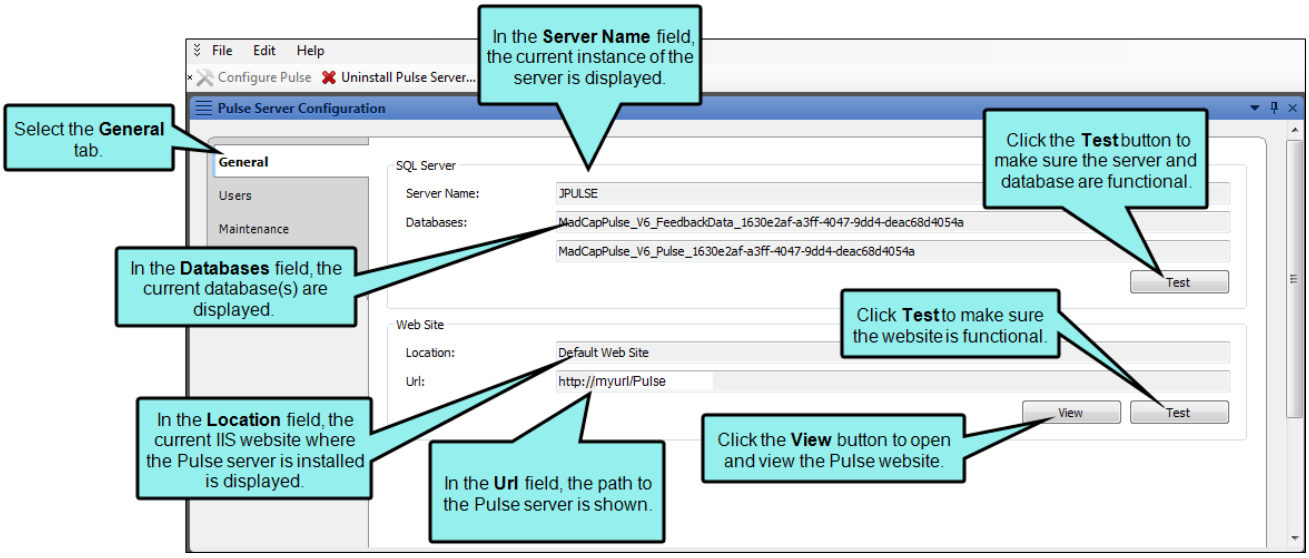
1. Log in to the Pulse web server as an administrator:
   - Username The username is always "PulseAdmin" by default.
   - Password This is the password that you defined during when you installed the Pulse server application.
2. Start the Pulse server application.
3. Select File > Set Admin Password.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

Pulse Server Configuration Window

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

GENERAL TAB

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

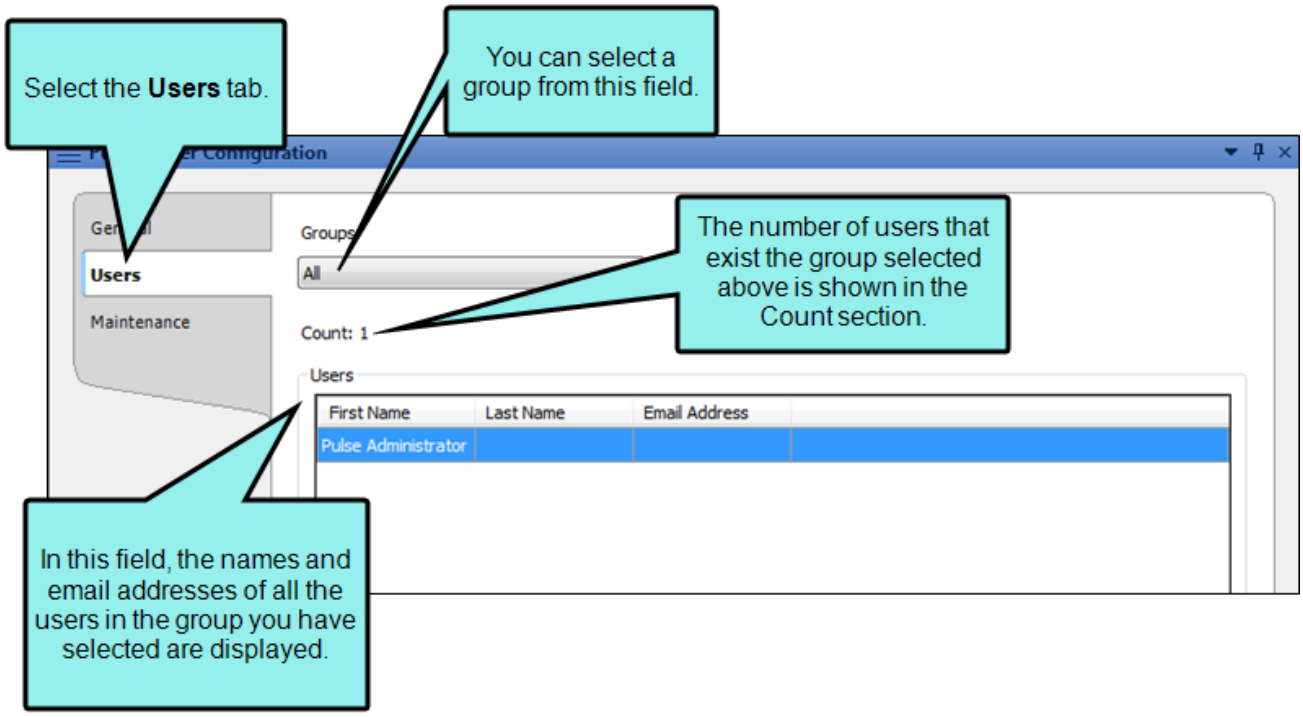


User Interface	Description
SQL Server	Contains information about your Pulse database.
Server Name	A read-only field that shows the computer name of the SQL Server and the instance for the Pulse database.
Databases	A read-only field that shows the Database IDs for the Pulse databases.
Test	Click this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

User Inter-face	Description
View	Click this button to open the Pulse dashboard in a web browser. HOW TO VIEW THE WEB SITE SETTINGS 1. Start the Pulse server application. 2. In the Pulse Server Configuration window, select the **General** tab. 3. Click **View**. 4. Depending on your configuration, one of the following occurs: ■ **If You are Able to View the Web Site** If your web site settings is properly configured, the Pulse dashboard appears in a separate browser window. OR ■ **If You are Not Able to View the Web Site** If your web site settings are not properly configured, a "Pulse was not able to process your request message" may appear.See "Frequently Asked Questions" on page 124.
Test	Click this button to test the web site settings. HOW TO TEST THE WEB SITE SETTINGS 1. Start the Pulse server application. 2. In the Pulse Server Configuration window, select the **General** tab. 3. Click **Test**. 4. Depending on your configuration, one of the following occurs: ■ **Web site test succeeded** If your web site settings is properly configured, the Web site test succeeded dialog appears. OR ■ **Web site test failed** If your test is not successful, an error message is shown.See "Frequently Asked Questions" on page 124.

USERS TAB

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

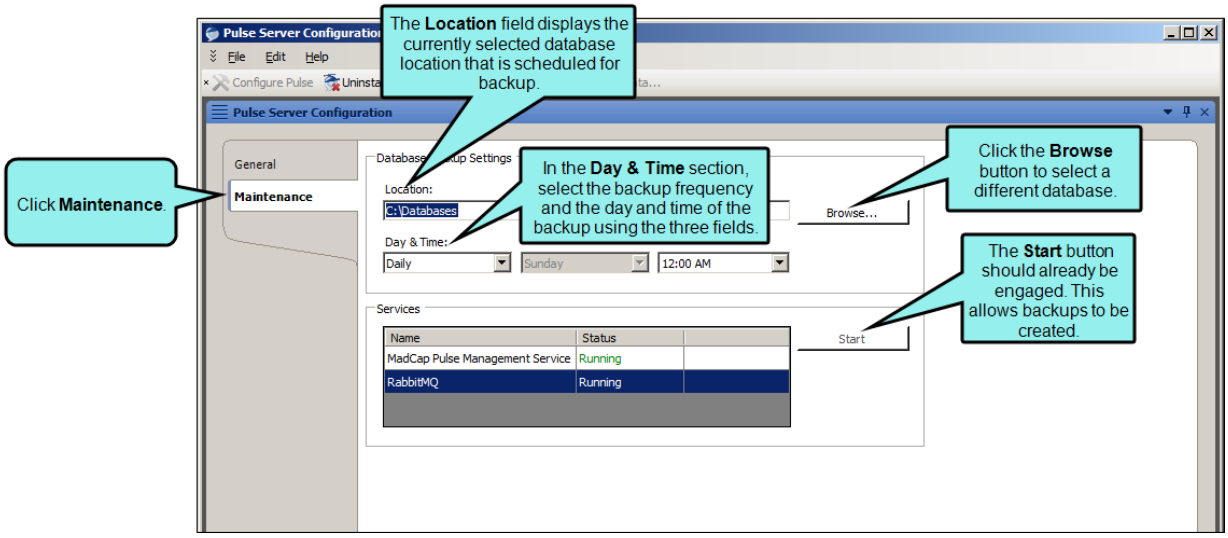


User Interface	Description
Groups	Select one of the listed groups from the drop-down list. HOW TO VIEW USER COUNTS AND INFORMATION 1. Start the Pulse server application. 2. In the Pulse Server Configuration window, select the **Users** tab. 3. From the **Groups** list, select one of these options: ■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

MAINTENANCE TAB

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

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



HOW TO SCHEDULE A BACKUP

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

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

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

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

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

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

     NOTE: If you choose this method, the Pulse web server must have permission to write to the drive. In addition, the system drive must be powered on and connected to the network at the scheduled backup time.
4. In the **Day & Time** fields, specify the desired backup schedule:
   - **Daily or Weekly** Select either **Daily** or **Weekly**.
   - **Day of Week** If you select a Weekly backup schedule, you can also select the desired day to perform the backup.
   - **Time** Select the time of day to perform the backup.

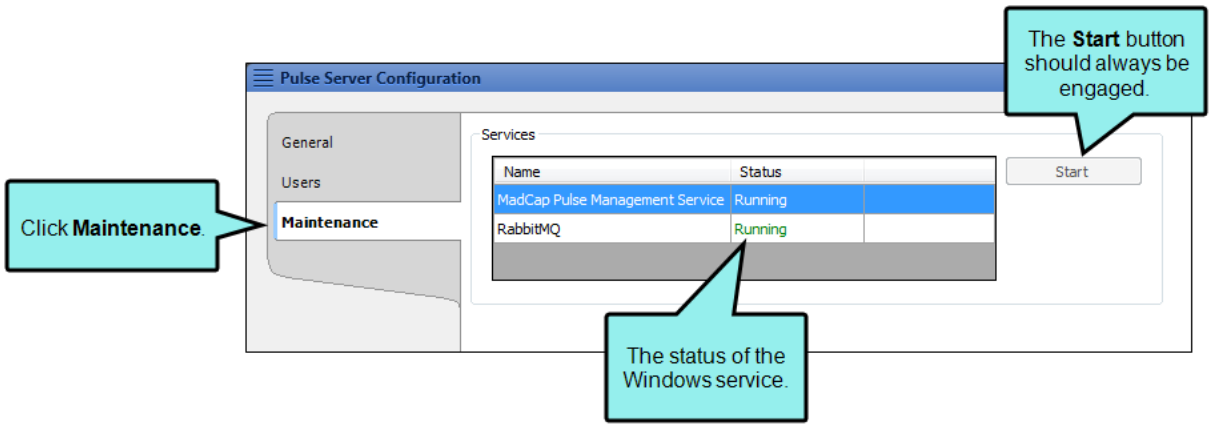
5. As long as the listed Services are running, you will not need to click **Start**. In the event that services stop running,simply click **Start** to restart the services and backup schedule.

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

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

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

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



HOW TO BACKUP AND RESTORE DATABASES IN SQL SERVER

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

- For SQL Server 2012 http://technet.microsoft.com/en-us/library/ms187048(v=sql.110).aspx
- For SQL Server 2008 R2 http://technet.microsoft.com/en-us/library/ms187048(v=sql.105).aspx
- For SQL Server 2008 http://technet.microsoft.com/en-us/library/ms187048(v=sql.100).aspx

Importing Feedback Data

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

WHAT GETS IMPORTED

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

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

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

HOW TO IMPORT FEEDBACK DATA

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

Updating Pulse

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

HOW TO UPDATE PULSE

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

Uninstalling Pulse

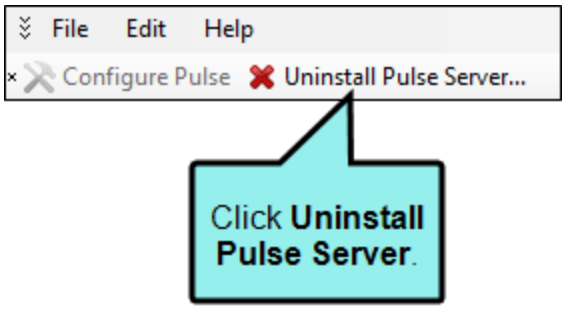
You can uninstall the Pulse server and the application.

HOW TO UNINSTALL THE PULSE SERVER

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

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

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



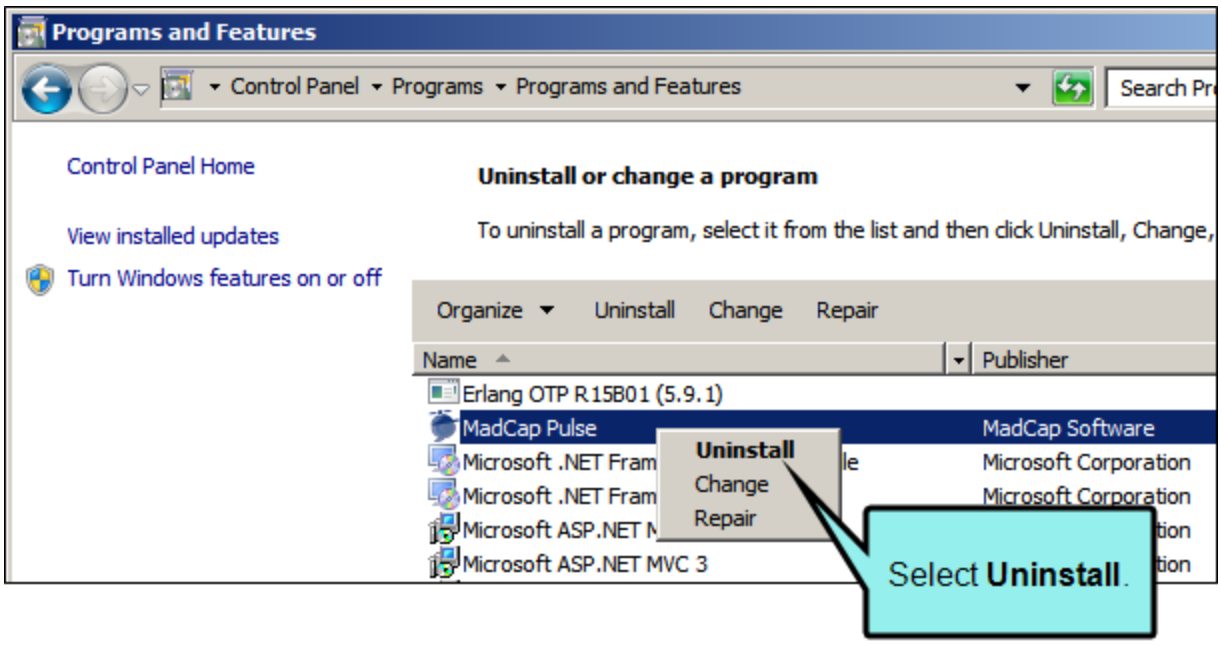
4. When prompted to decide if you want to proceed, click **Yes**. The system removes all of the Pulse server's configuration information.

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

HOW TO UNINSTALL THE PULSE SERVER APPLICATION

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

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



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

CHAPTER 7

Integrating Flare and Pulse

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

This chapter discusses the following:

Integration Options 91
Enabling the Pulse Server 92
Setting Up the Community in Flare 95
Mapping/Remapping a Flare Community to Pulse 104
Enabling the Community Tab in the Output 116
Setting the Community Options—Comments and Search Results .. 119
Building and Publishing the Flare Output 123

Integration Options

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

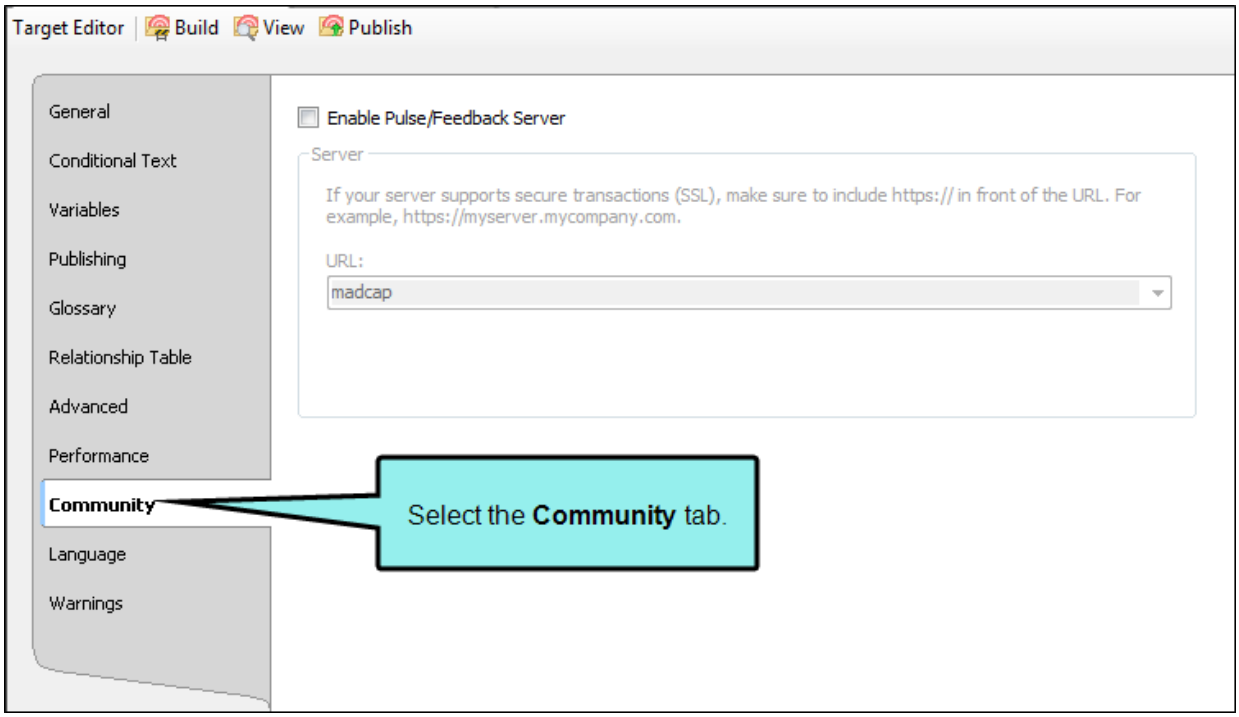
- Add a Single Flare Community for Use With Multiple Targets In this scenario, you add one Flare community which creates a corresponding Pulse system. Then you associate that community with multiple Flare targets. This method gives you less-granular reporting capabilities in Pulse.
- Add a Unique Flare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

Enabling the Pulse Server

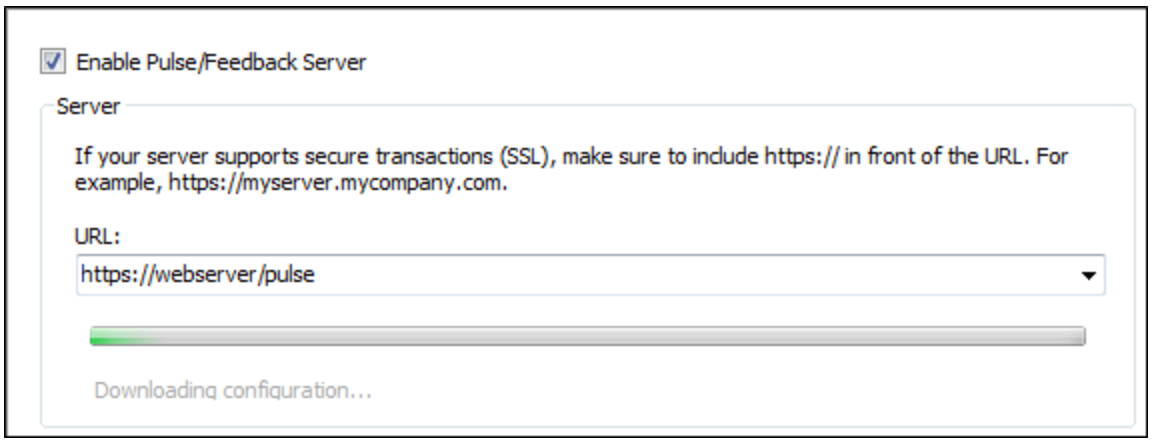
To give Flare the ability to interact with Pulse, you must supply the Flare community in the target with the appropriate connection information and administrative access credentials for the Pulse web server.

HOW TO ENABLE THE PULSE SERVER

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



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



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

NOTE: If you have installed a Secure Sockets Layer (SSL) certificate on the Pulse web server, ensure that the URL starts with the https:// protocol (instead of http://).

c. Enter the access credentials as appropriate:

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

  OR

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

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

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

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

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

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

Setting Up the Community in Flare

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

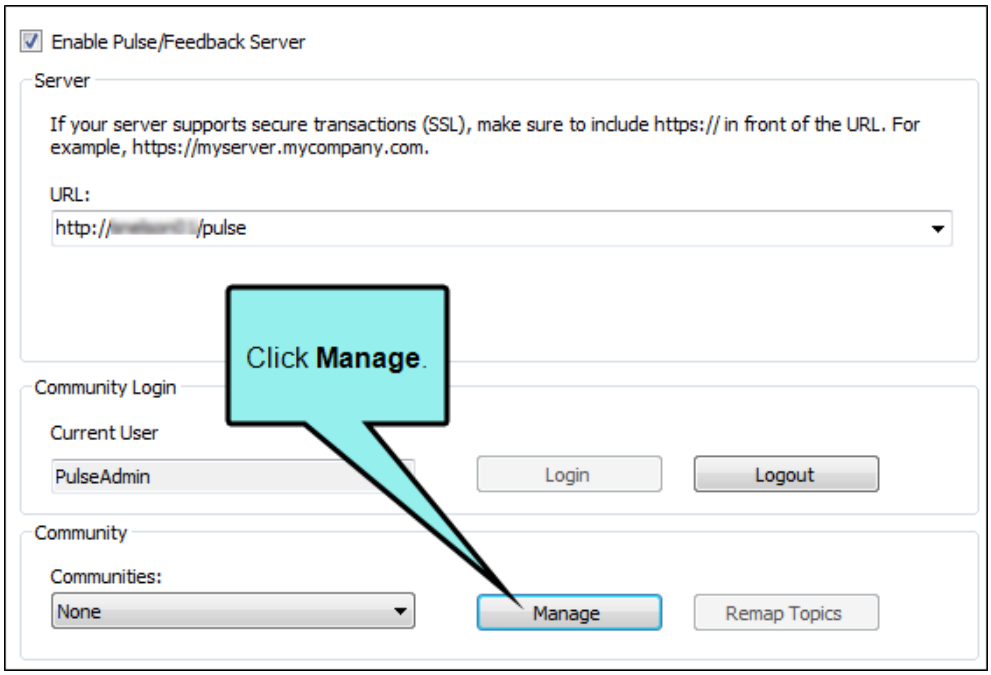
HOW TO ADD A NEW FLARE COMMUNITY

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

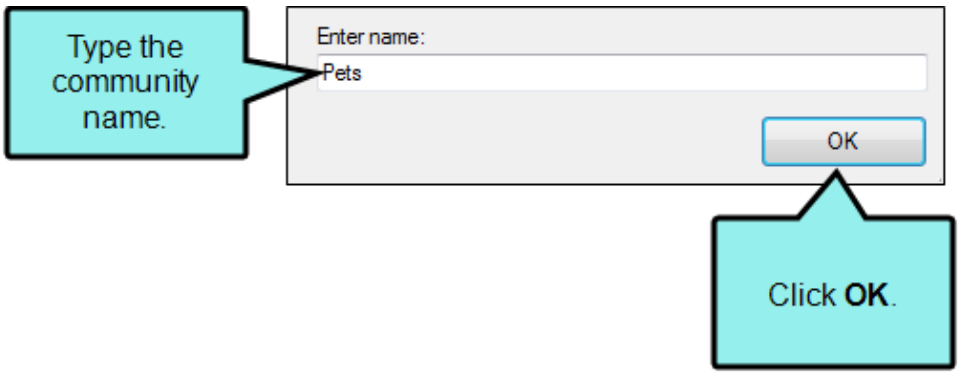
- The activity streams that are used when moderating your topics with the Pulse dashboard
- The embedded discussion forms that registered Pulse users can access in the Flare output

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

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



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



4. In the Manage Communities dialog, the new community appears. Click **OK** to close the dialog.
5. Click **Refresh** to update the Current Pulse Configuration info. This provides you with basic information about the community, such as the status of the server, and the total number of users.

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

You also have the ability to select an existing community, delete a community, provide a published URL, and rename a community as follows:

HOW TO SELECT AN EXISTING FLARE COMMUNITY

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

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

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

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

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

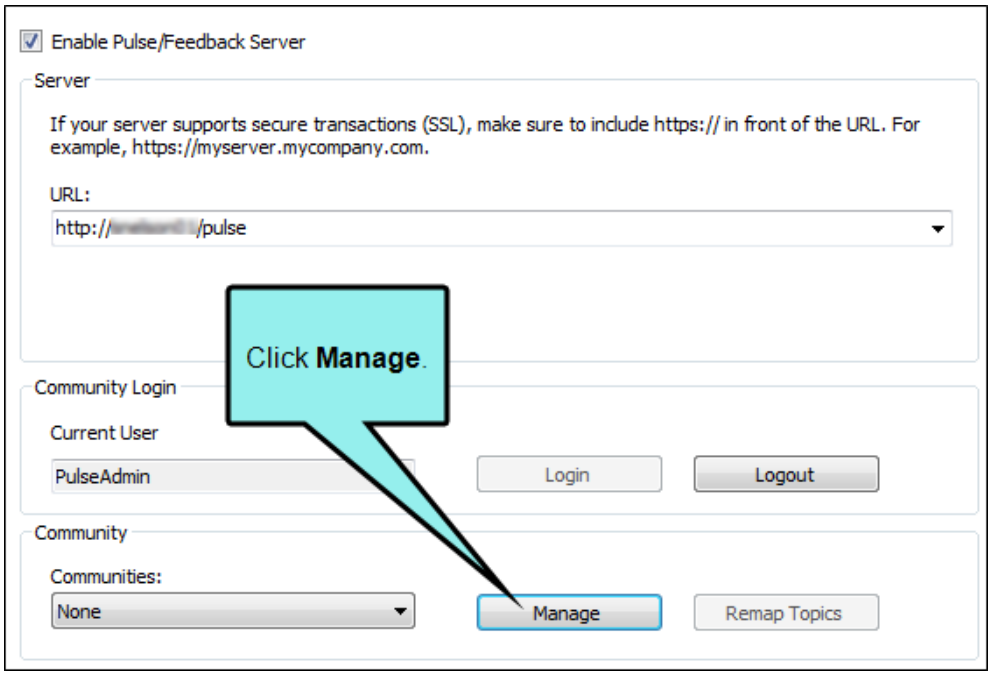
NOTE: If you want to verify that the Flare community you added is now a system in Pulse, log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group. The select **Systems > Find Systems** from the menu. The community you created will appear in the list.

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

HOW TO DELETE A FLARE COMMUNITY

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

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

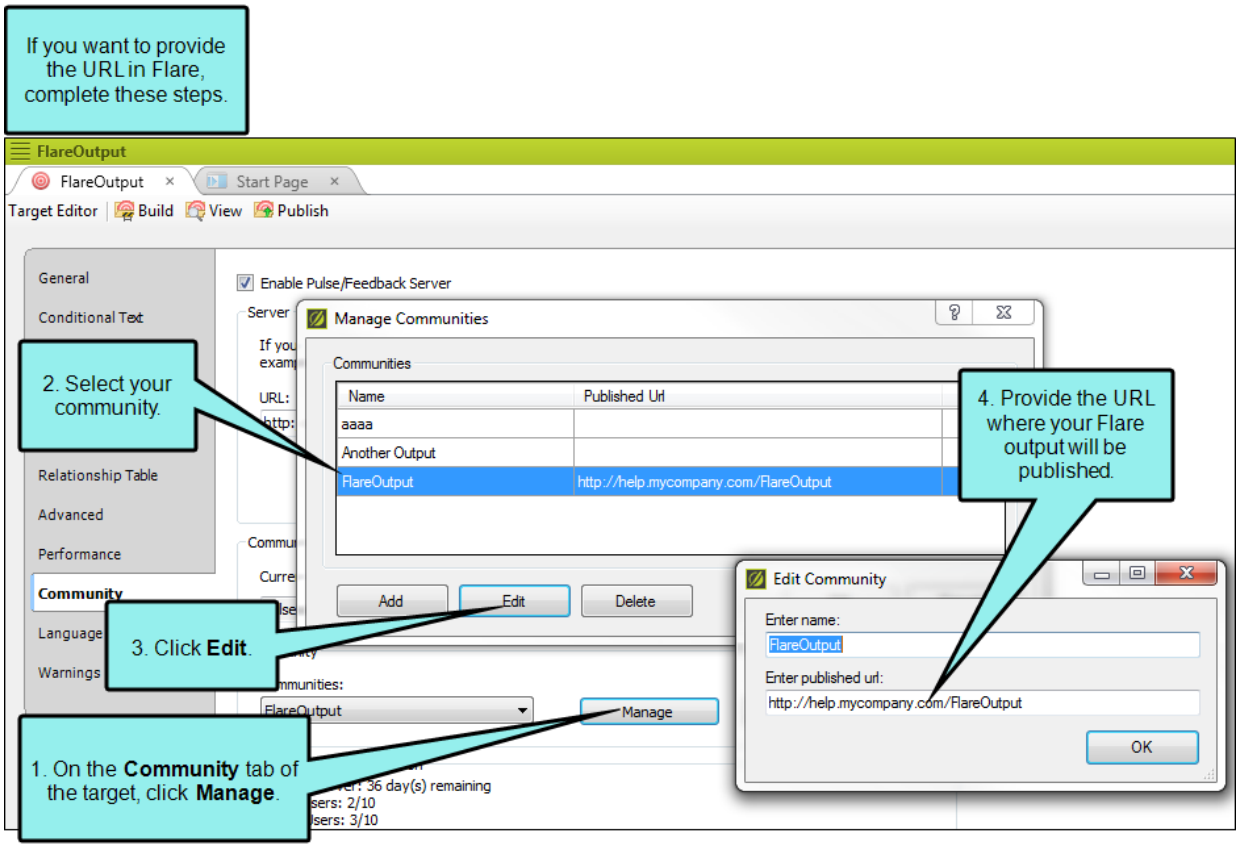


2. In the Manage Community dialog, select the community that you want to remove. Then click **Delete**.
3. When prompted to confirm the delete action, click **Yes**. This removes your selection from the Communities list.
4. Click **OK** to close the Manage Communities dialog.
5. Click **Remap Topics**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

HOW TO PROVIDE A PUBLISHED URL FOR A COMMUNITY

You can assign a URL path to your community from your Flare target (if you have Flare 10.2 or later installed). This can also be done from the Pulse dashboard (by selecting **Administration > Settings** and clicking **Communities**), but using the Flare target is recommended.

1. Under the **Community** area, click the **Manage** button.
2. In the Manage Communities dialog, highlight the community that you want to edit. Then click **Edit**
3. In the Edit Community dialog, click in the **Enter published url** field and enter a path to the main landing page of your Flare output.



When you enter a published URL path, make sure you include http:// at the beginning of the URL.

EXAMPLE

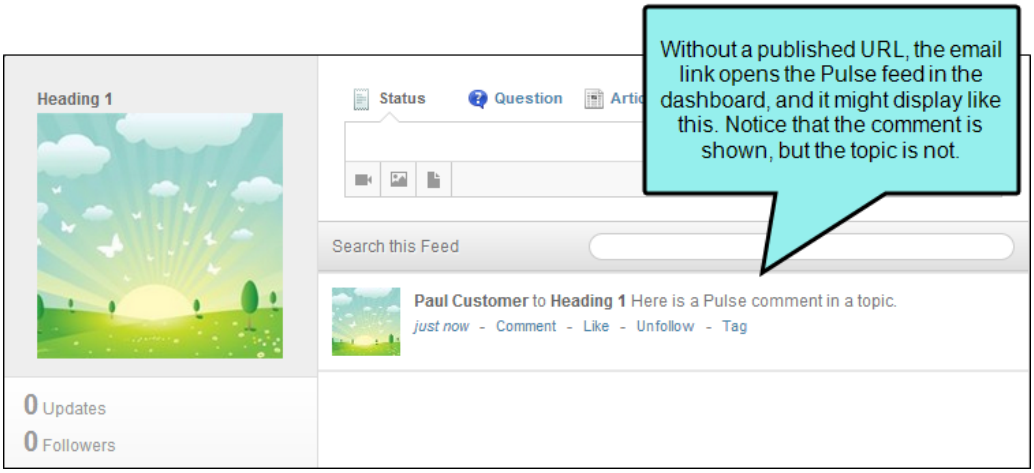
Let's say you've generated a target called "FlareOutput" and you've uploaded the output so that users access it here: help.mycompany.com/FlareOutput/Default.htm. In that case, enter http://help.mycompany.com/FlareOutput in the Published Url field.

4. Click **OK** to close the Edit Community dialog. Click **OK** to close the Edit Community dialog.
5. Click **OK** to close the Manage Communities dialog.
6. Click to save your work.

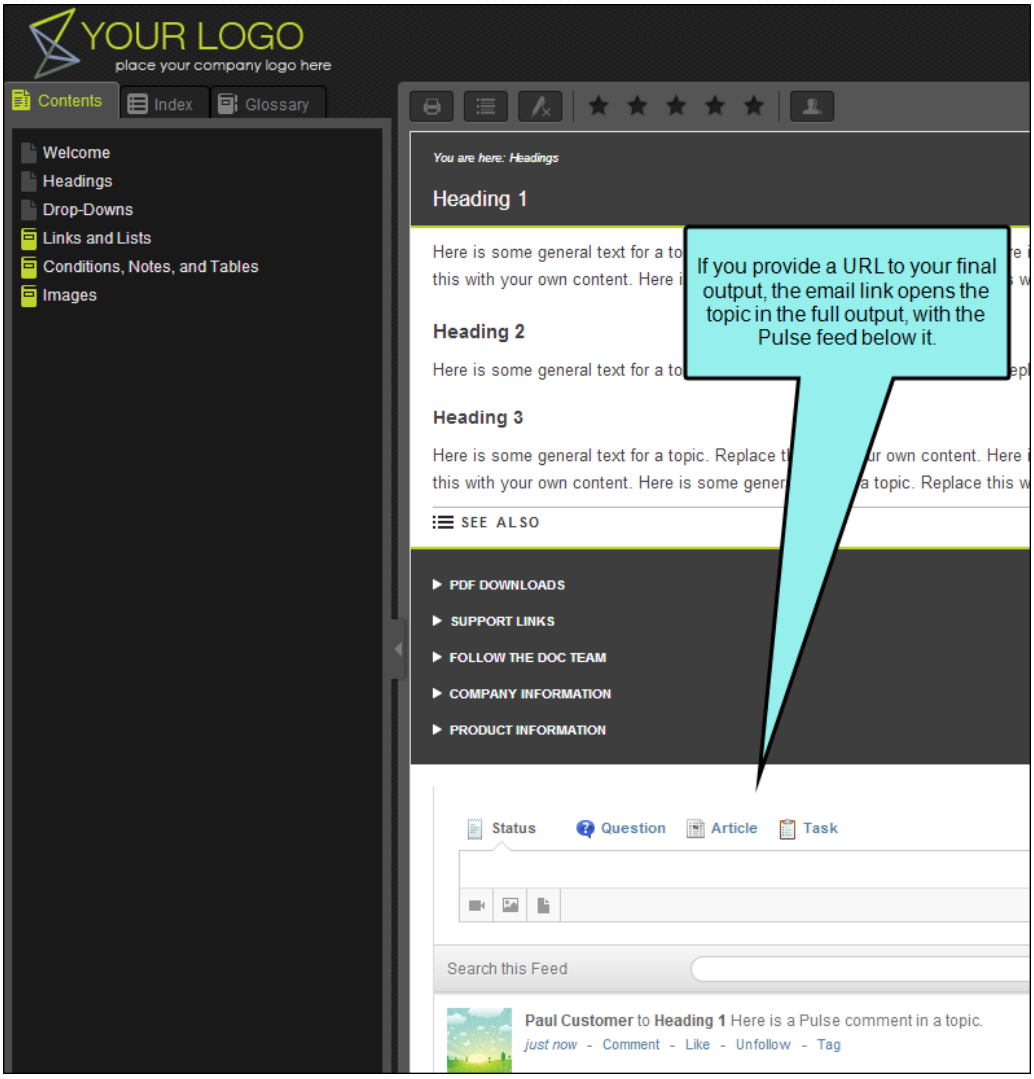
Why is it a good idea to assign a URL path to a community? Because it allows topic feeds to open in context.

EXAMPLE

Let's say you have not provided a published URL for your community. You receive an email notification stating that a user has posted a comment in one of your topics. So you click the topic name link in the email notification to see the feed where the comment was posted. The feed opens in the dashboard view of Pulse, which shows only the feed and not the topic associated with it.

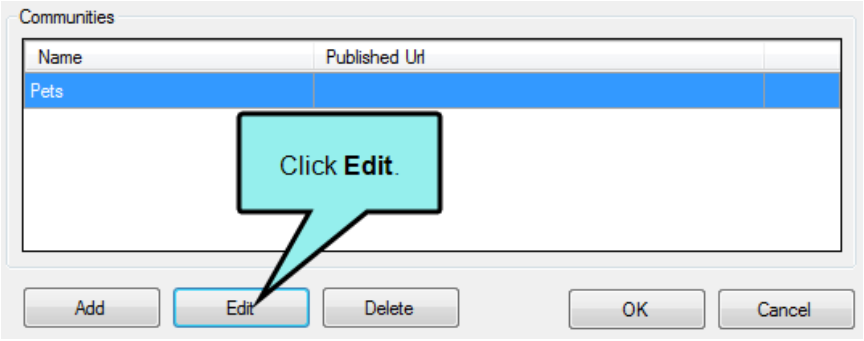


☆ On the other hand, let's say you provide a published URL to your community. In that case, when you click the topic link, the topic opens in the actual Flare output. You see both the topic and the Pulse feed below it, therefore giving context to the post.



HOW TO RENAME A FLARE COMMUNITY

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



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

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

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

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

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

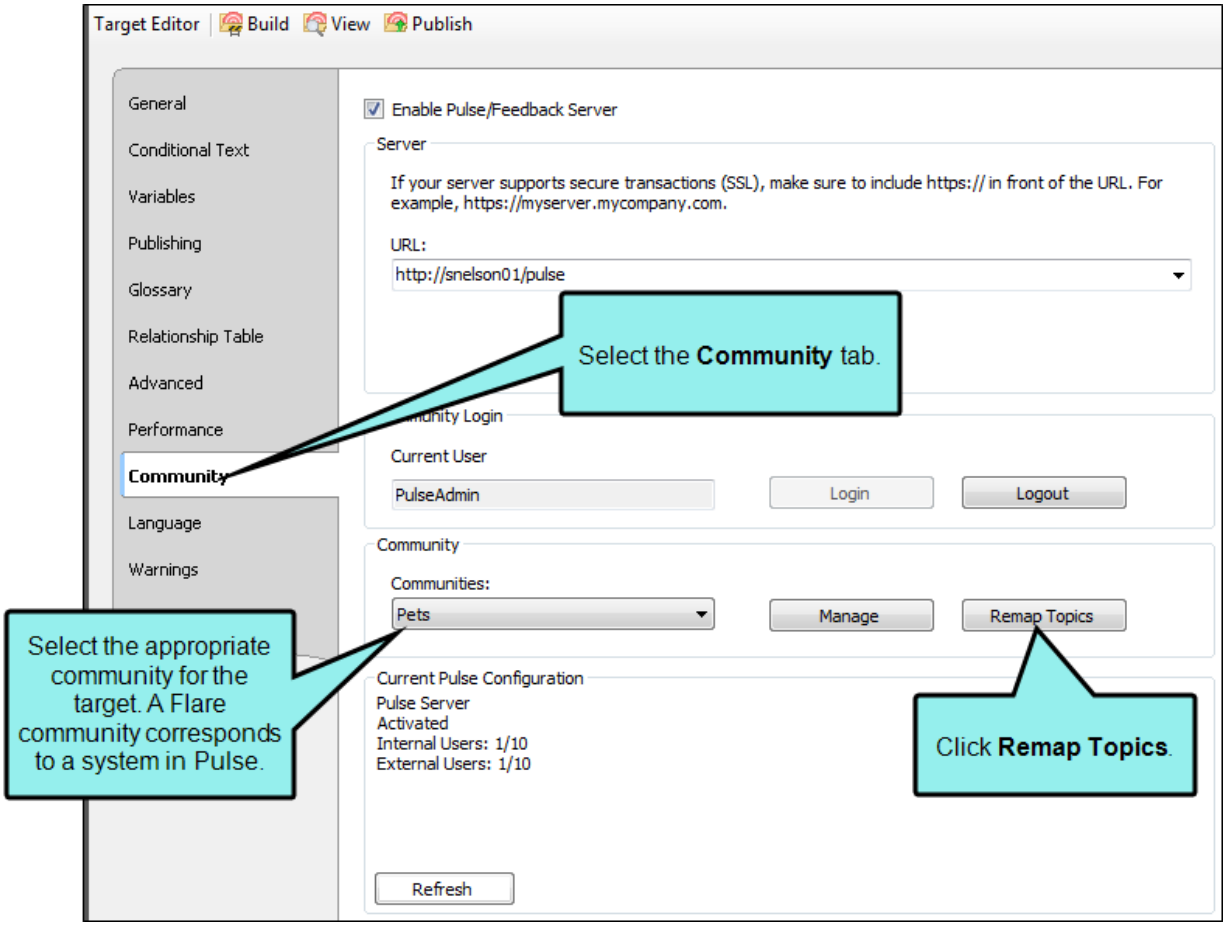
Mapping/Remapping a Flare Community to Pulse

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

HOW TO MAP A NEW FLARE COMMUNITY TO A PULSE SYSTEM

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

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

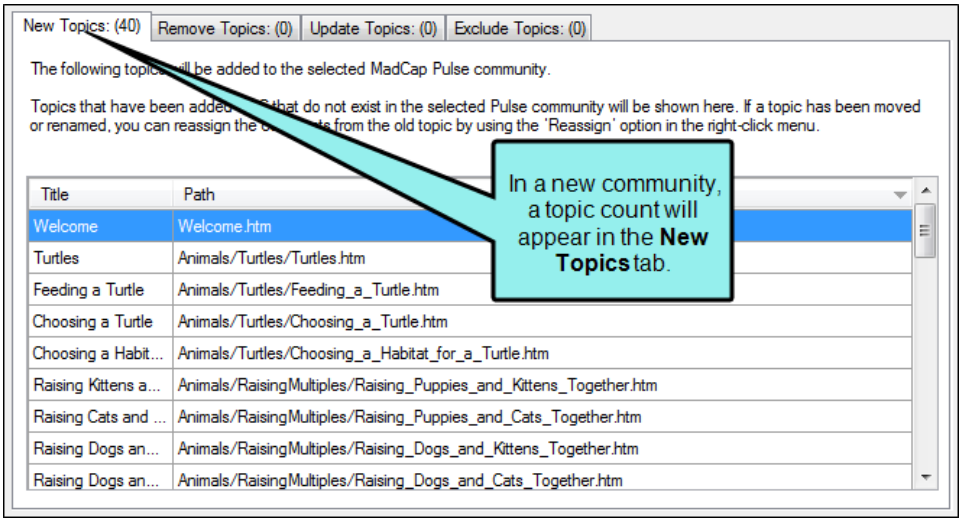


This opens the Remap Community Topics dialog.

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

EXAMPLE

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



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

7. Click to save your work.

HOW TO REMAP A FLARE COMMUNITY TO AN EXISTING PULSE SYSTEM

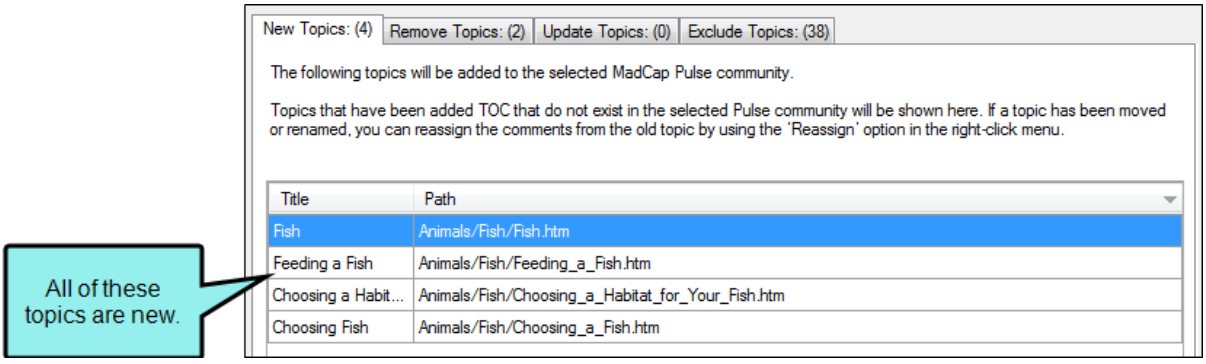
As you prepare to publish content updates to a Flare target, you can review the new, removed, and updated topics and then reassign any of the topics to the appropriate stream in the Pulse system. This stream corresponds to the embedded discussion form at the bottom of the Flare topic.

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

NEW TOPICS TAB

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

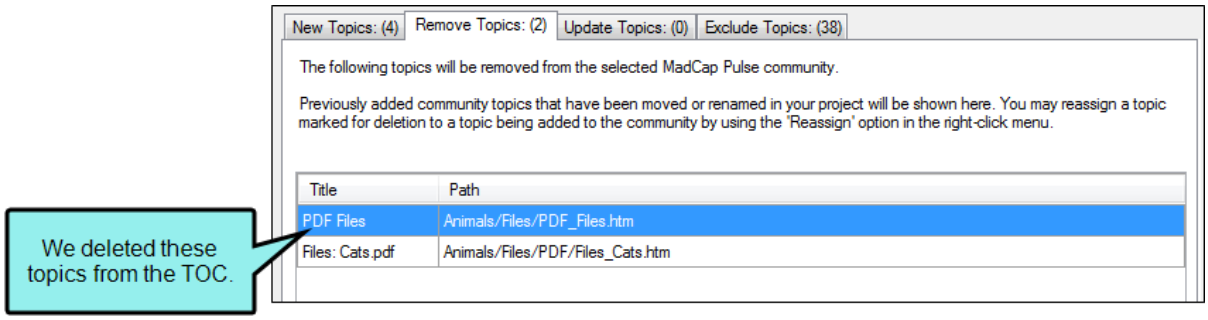
- **New Topics** New topics that have been added to the Flare TOC associated with the target.
- **Moved Topics** Existing topics that have been moved to a different folder or location in the Content Explorer.
- **Renamed Topics (New Name)** Existing topics where the actual file name has changed. The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



REMOVE TOPICS TAB

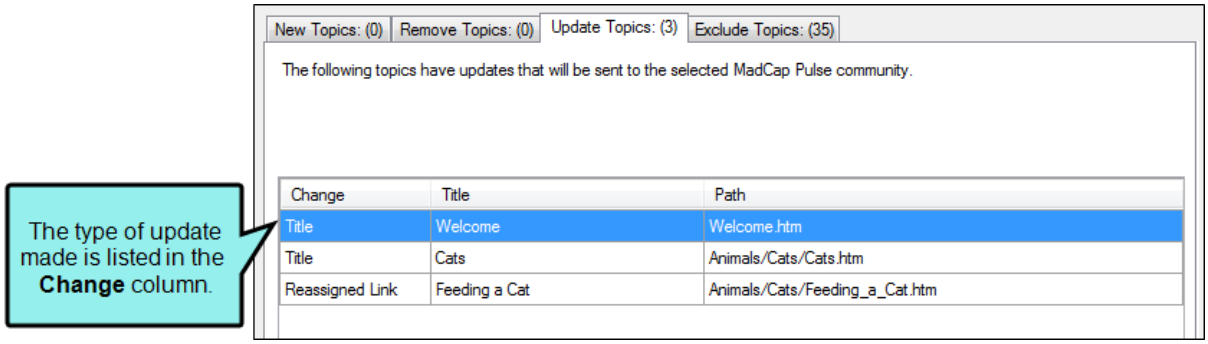
The Remove Topics tab lists Flare updates that have an effect on the Pulse mapping definitions:

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



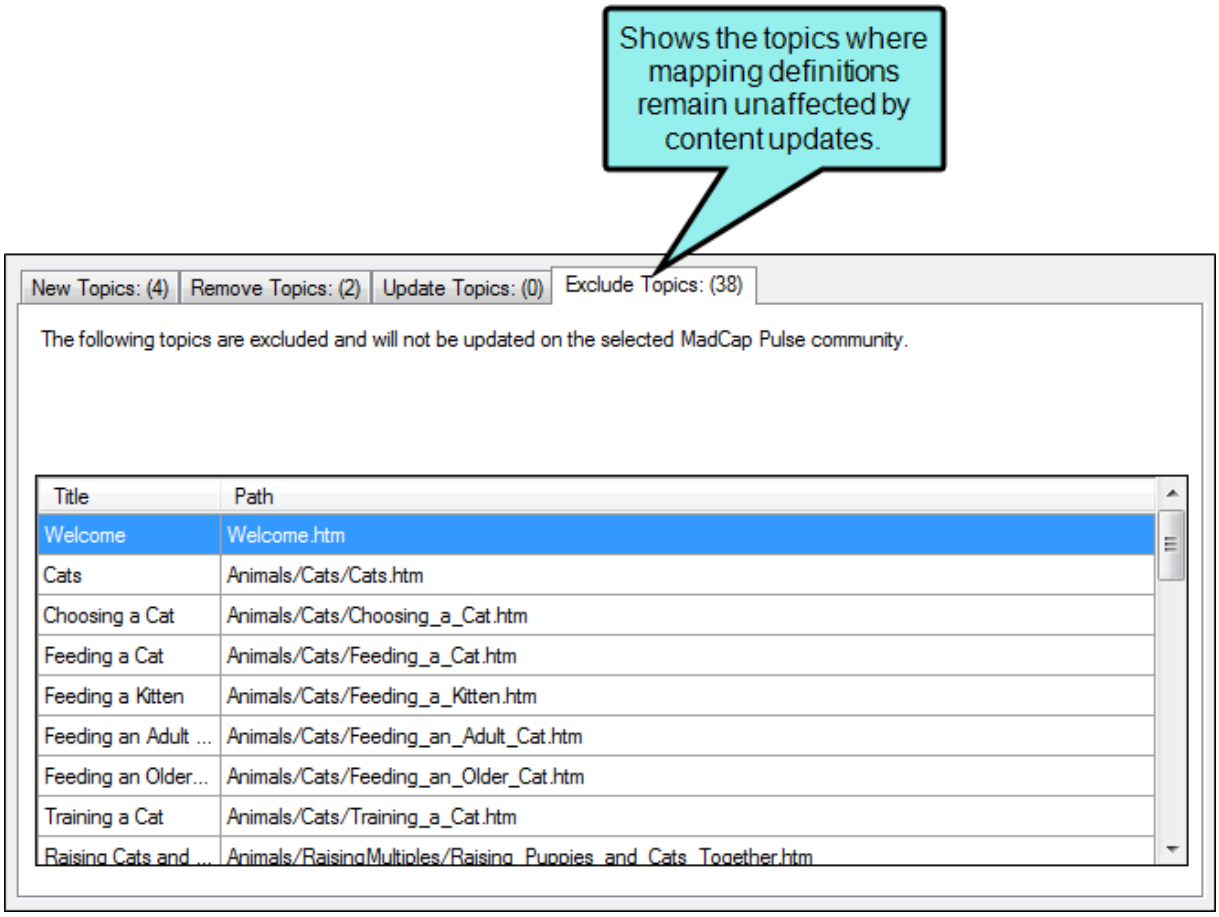
UPDATE TOPICS TAB

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



EXCLUDE TOPICS TAB

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



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

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

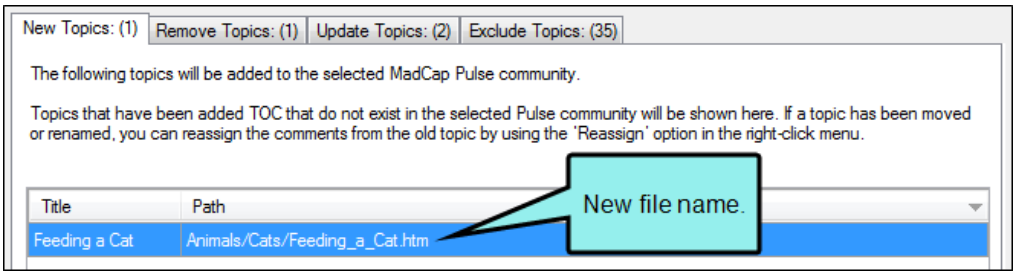
HOW TO REASSIGN A LINK

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

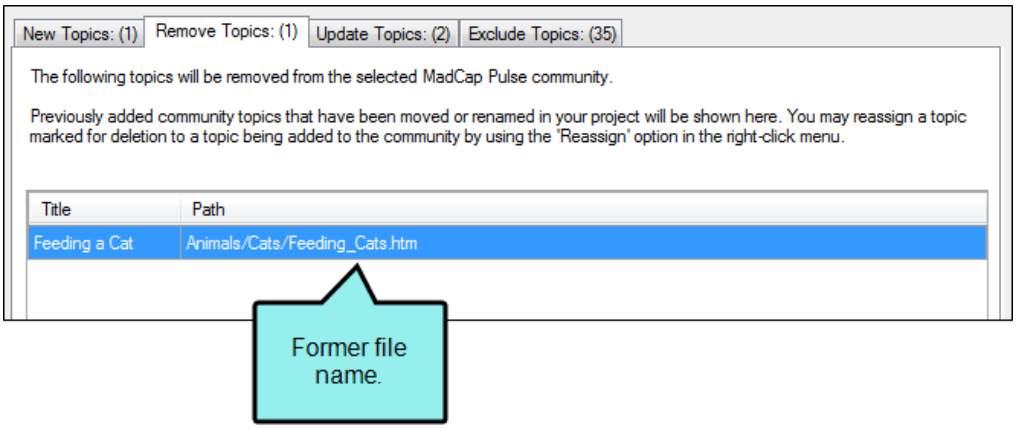
EXAMPLE

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

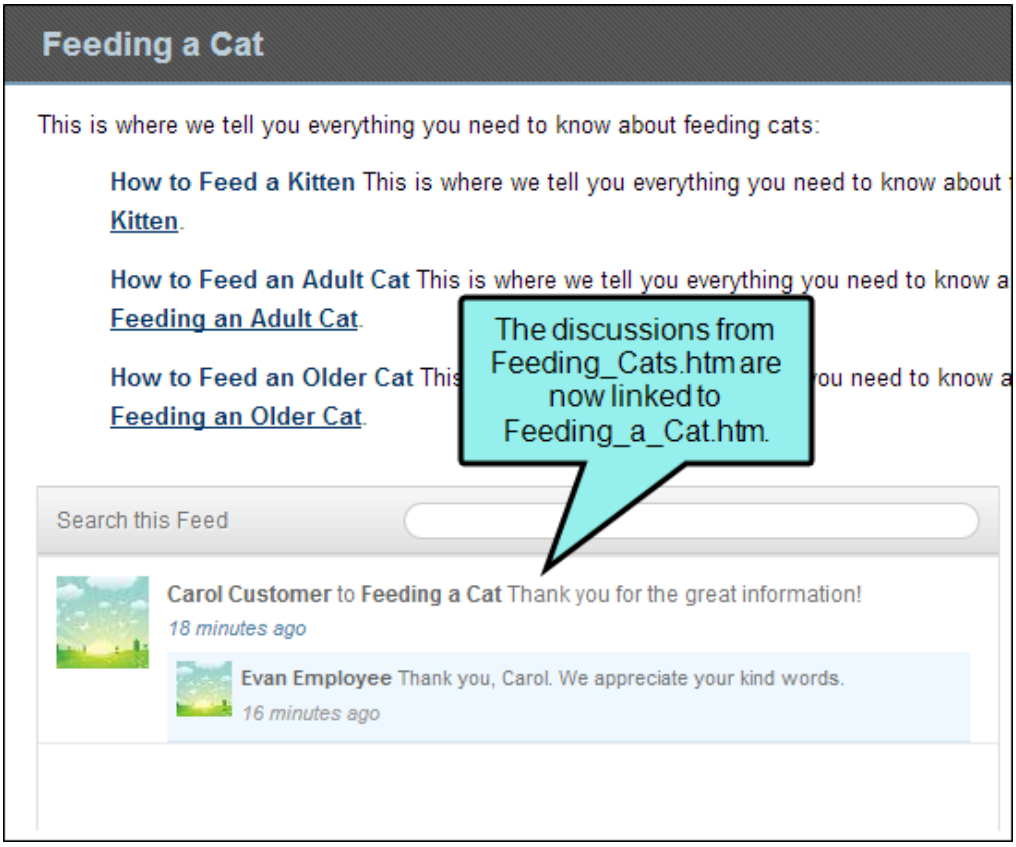
The New Topics tab will shown the new topic file name. If you click **OK** in the dialog, the system would add a new stream for the topic in the Pulse system:



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

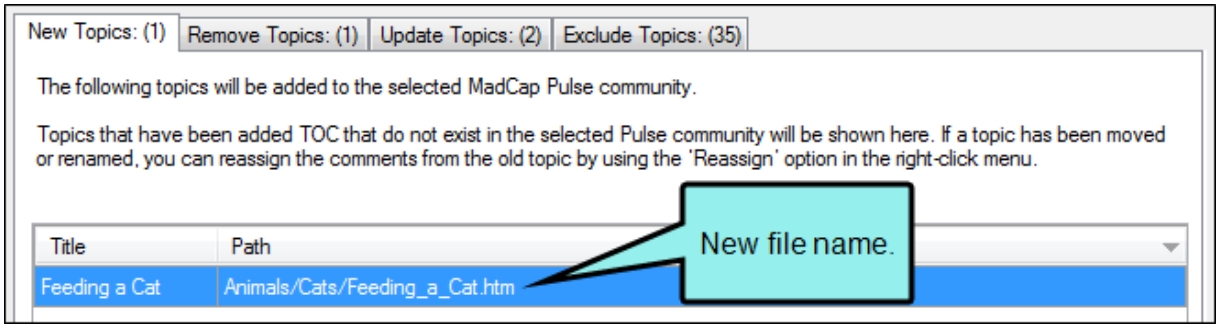


☆ Instead of creating a new stream for the new topic named "Feeding_a_Cat.htm", let's say you want to keep the discussion from the existing stream associated with "Feeding_Cats.htm." You can reassign the link to tie the discussion with the old file name to the new file name.

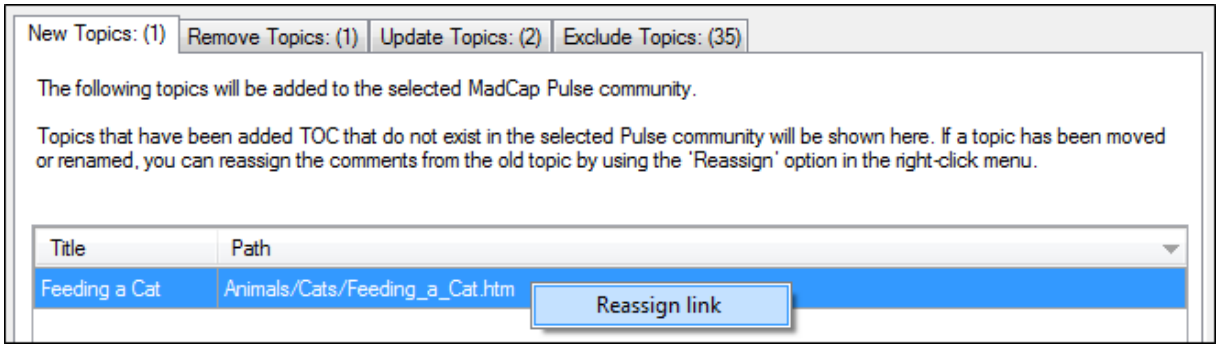


HOW TO REASSIGN A LINK

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

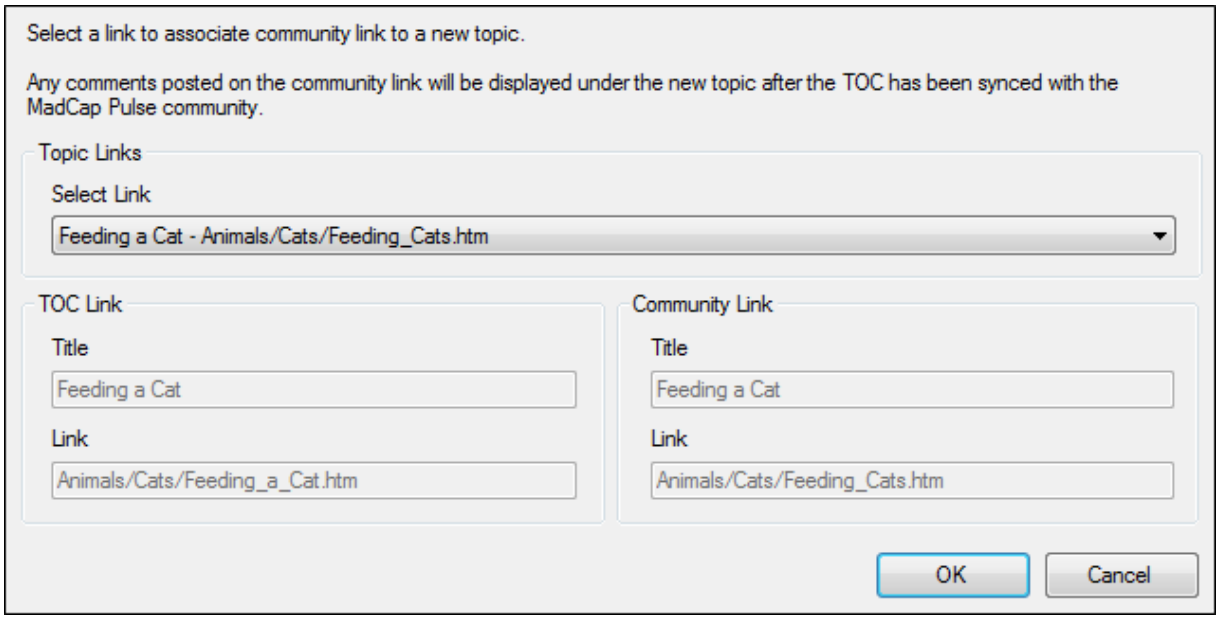


6. In the **New Topic** tab, right-click the new topic and select **Reassign Link** from the context menu.



This opens the Reassign Community Link dialog.

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



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

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

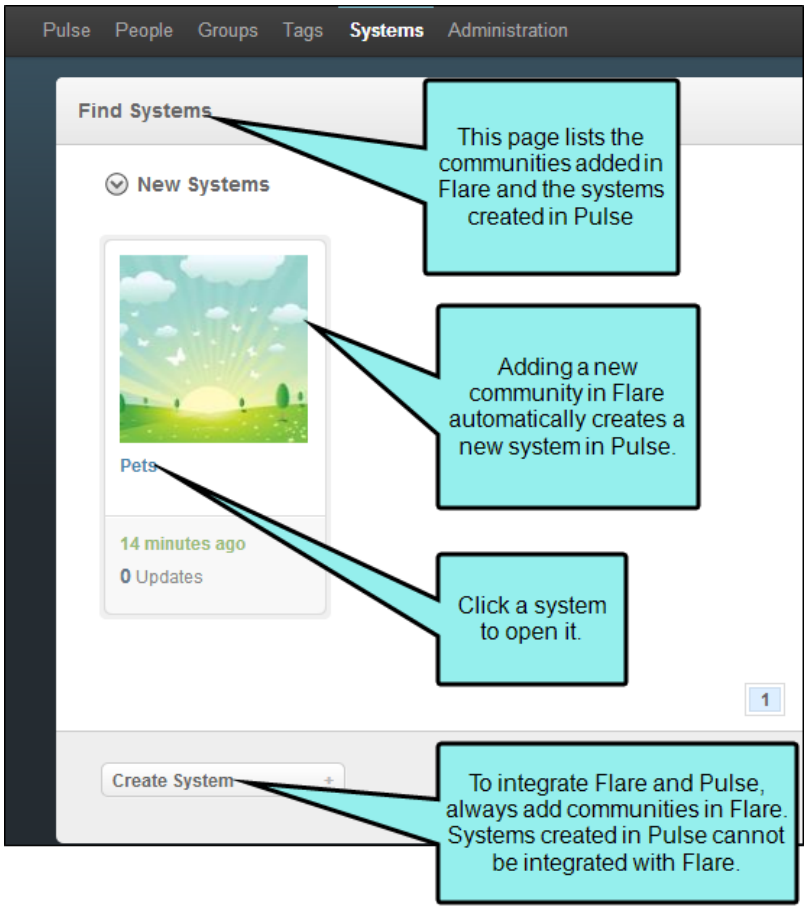
HOW TO VERIFY THE COMMUNITY TOPICS IN THE PULSE SYSTEM

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

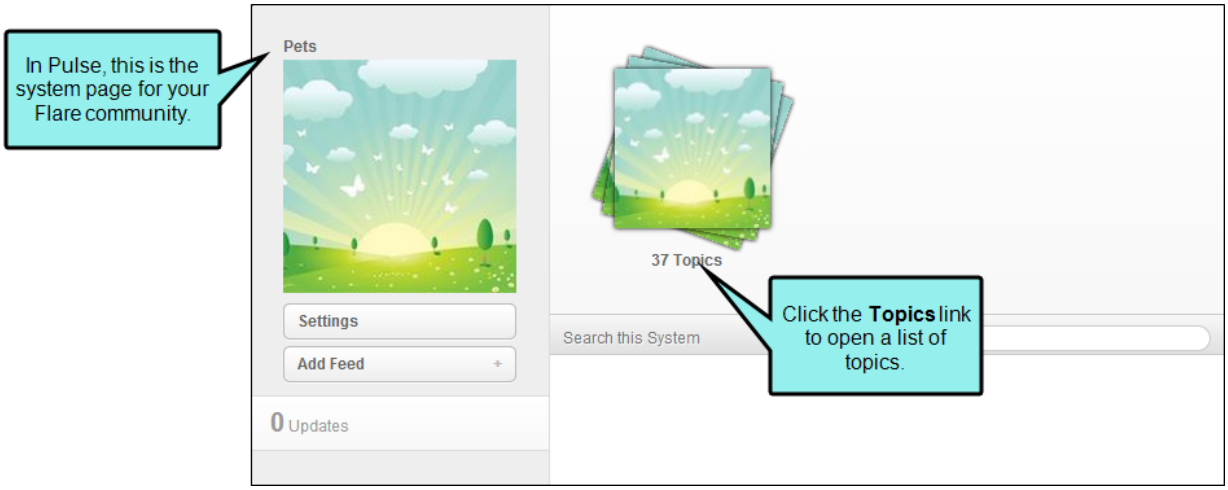
1. Log in to the Pulse dashboard with an appropriate user account.

   > NOTE: To access systems, you must be a member of the Administrators or Employees group.

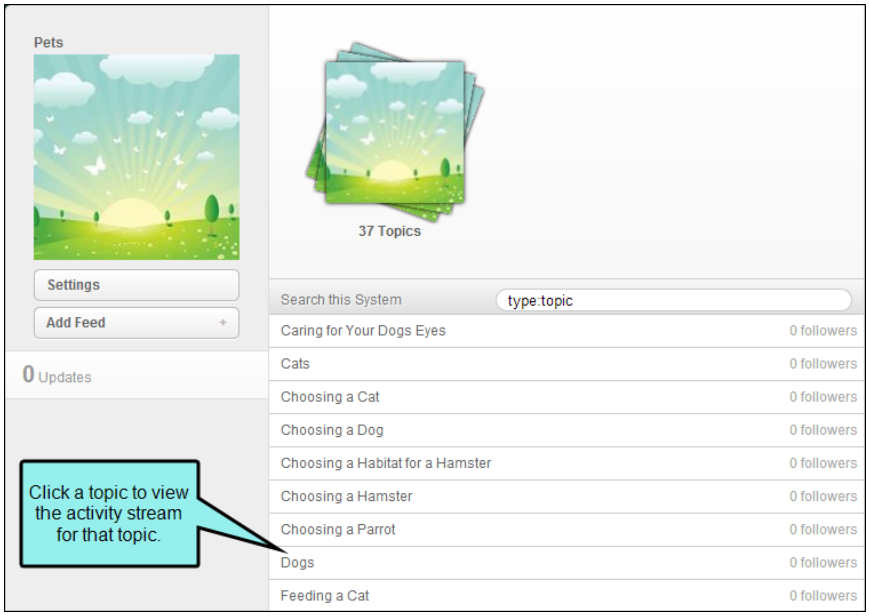
2. In the menu bar, select **Systems > Find Systems**. The Find Systems page appears.
3. Under **New Systems**, click the Pulse system that corresponds to the appropriate Flare community.



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



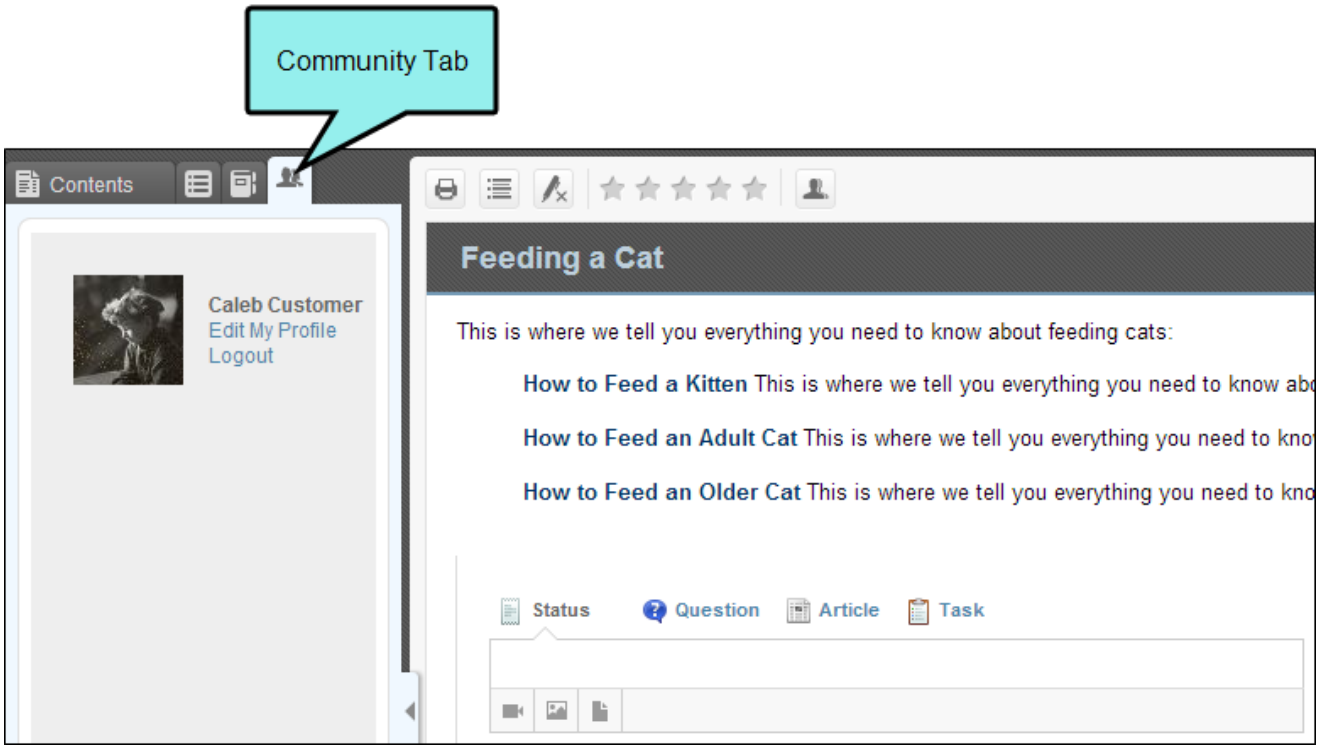
5. In the list of topics, click a topic. Any community activity for the topic will be reflected in the stream.



Enabling the Community Tab in the Output

You need to decide whether you want to include or exclude the Community tab with your published output. For HTML5 output, this can be done for Tripane skins only.

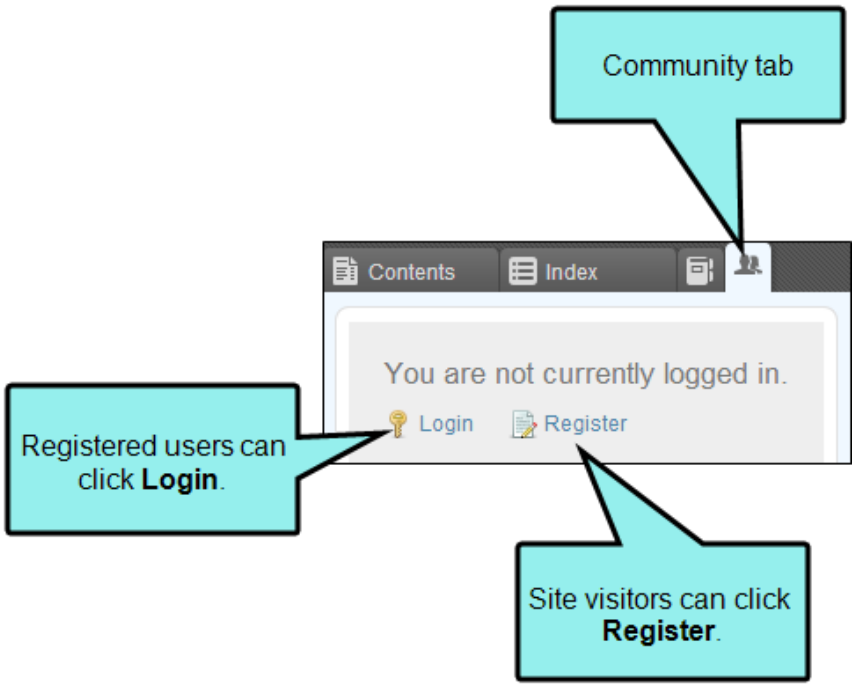
Below is an example of the Community tab:



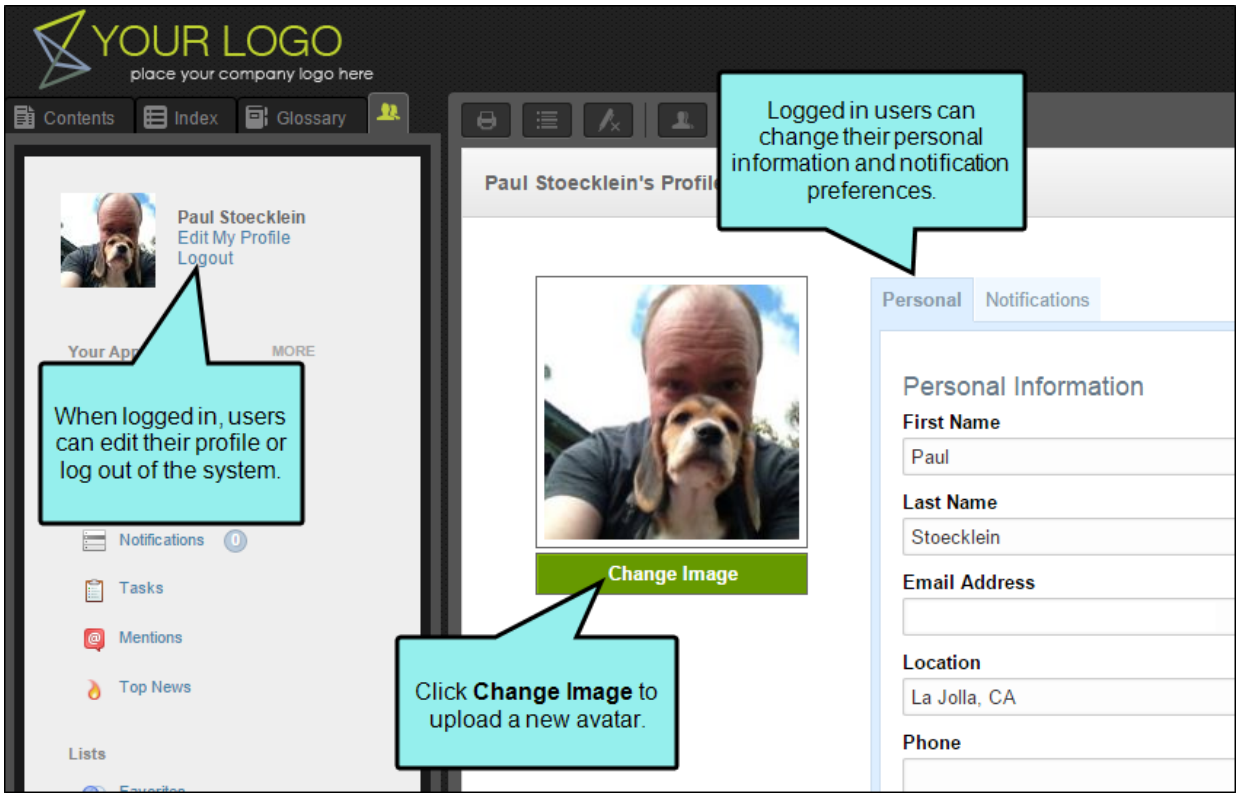
You can enable or disable this feature by editing the general features of the skin associated with the Flare target.

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

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



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



NOTE: You cannot add a Community pane to Top Navigation or skinless HTML5 output, because those outputs do not use panes. However, registered users can open the dashboard in a browser and access some of the features that are normally available in the Community pane in the Flare output (depending on the access level).

Setting the Community Options—Comments and Search Results

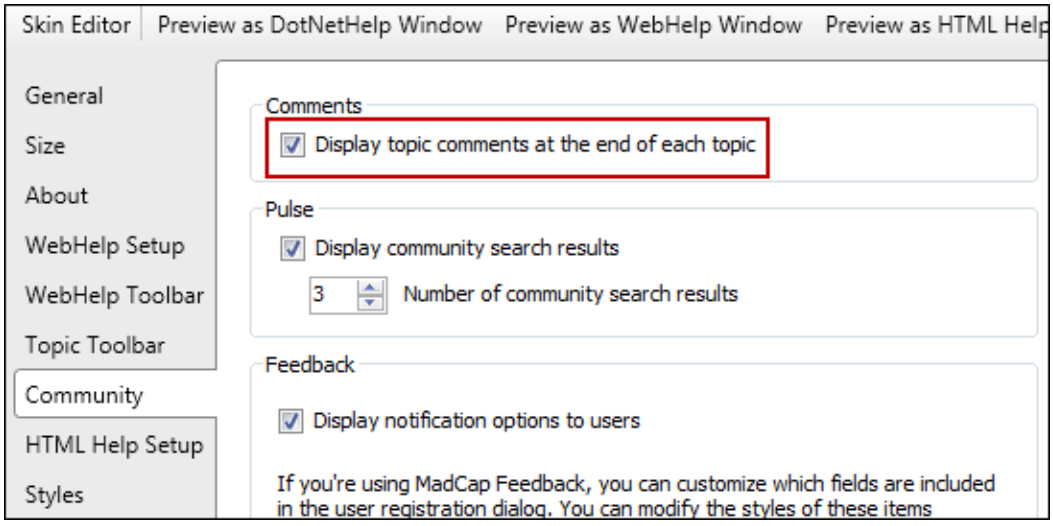
You can set community options, which control the display of comments and search results. For both Standard and HTML5 skins, you can do this in the Skin Editor. For HTML5 outputs—including skinless—you can also use your stylesheet to display or hide topic comments; this makes it possible to show comments for some topics but hide them for others.

HOW TO SET THE COMMUNITY OPTIONS USING A SKIN

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

TO DISPLAY TOPIC COMMENTS

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

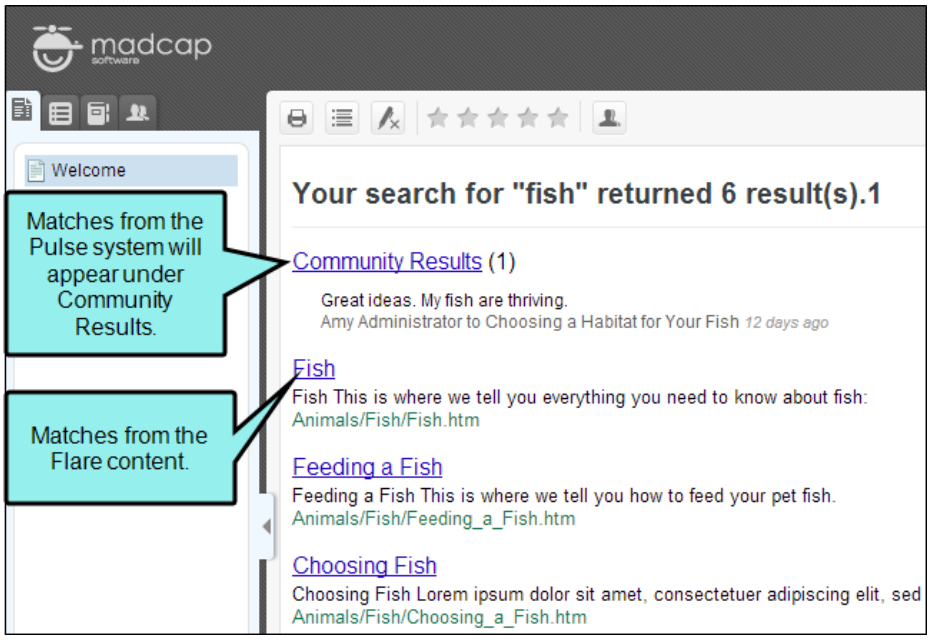


TO DISPLAY COMMUNITY SEARCH RESULTS

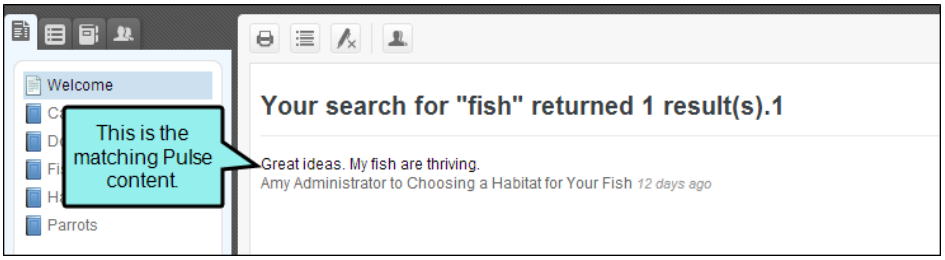
You can configure the Flare skin to give the Flare search engine the ability to index the Pulse system and return any community results when end users perform searches.

EXAMPLES

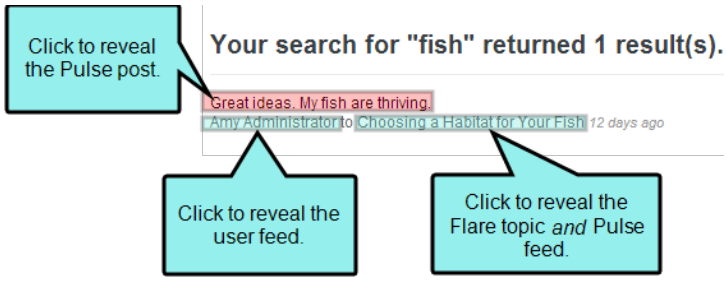
In HTML5 output, Pulse posts matching the search query are listed on the Search Results page under a **Community Results** link:



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



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



This feature works similarly in WebHelp output.

TO DISPLAY SEARCH RESULTS

a. Open a Standard or HTML5 skin.

b. Click the **Community** tab.

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

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

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

3. Click  to save your work.

Building and Publishing the Flare Output

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

When building the output, you may see a message that states, "Some community features will not be displayed in tablet and mobile outputs." This means that when users are viewing your responsive output on a tablet or phone, they will not see comments or the Community tab. However, Pulse still tracks hits on pages in those formats for reporting purposes. You can hide the warning if you do not want to see it in future builds.

CHAPTER 8

Frequently Asked Questions

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

This chapter discusses the following:

General 125
Windows Installer 126
.NET Framework 127
IIS 131
Pulse Setup Program 140
Pulse Server Application 141
RabbitMQ 145
User Administration 147

General

Following are general frequently asked questions about the Pulse installation.

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

No. You can host the published Flare output on any server, computer, or location that has access to your Pulse web server.

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

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

HOW DO I INTEGRATE PULSE WITH MY FLARE CONTENT?

If you have installed Pulse, you can now open the Flare project and enable the Pulse features using the Community Tab in the Flare target. See "Integrating Flare and Pulse" on page 90.

Windows Installer

Following are frequently asked questions about the Windows installer.

WHAT VERSION OF WINDOWS INSTALLER DO I HAVE?

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

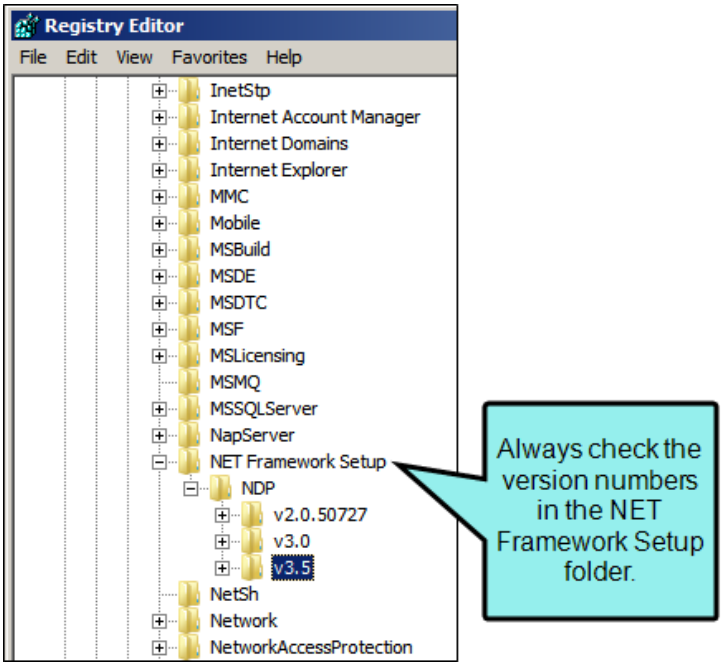
.NET Framework

Following are frequently asked questions about the .NET framework.

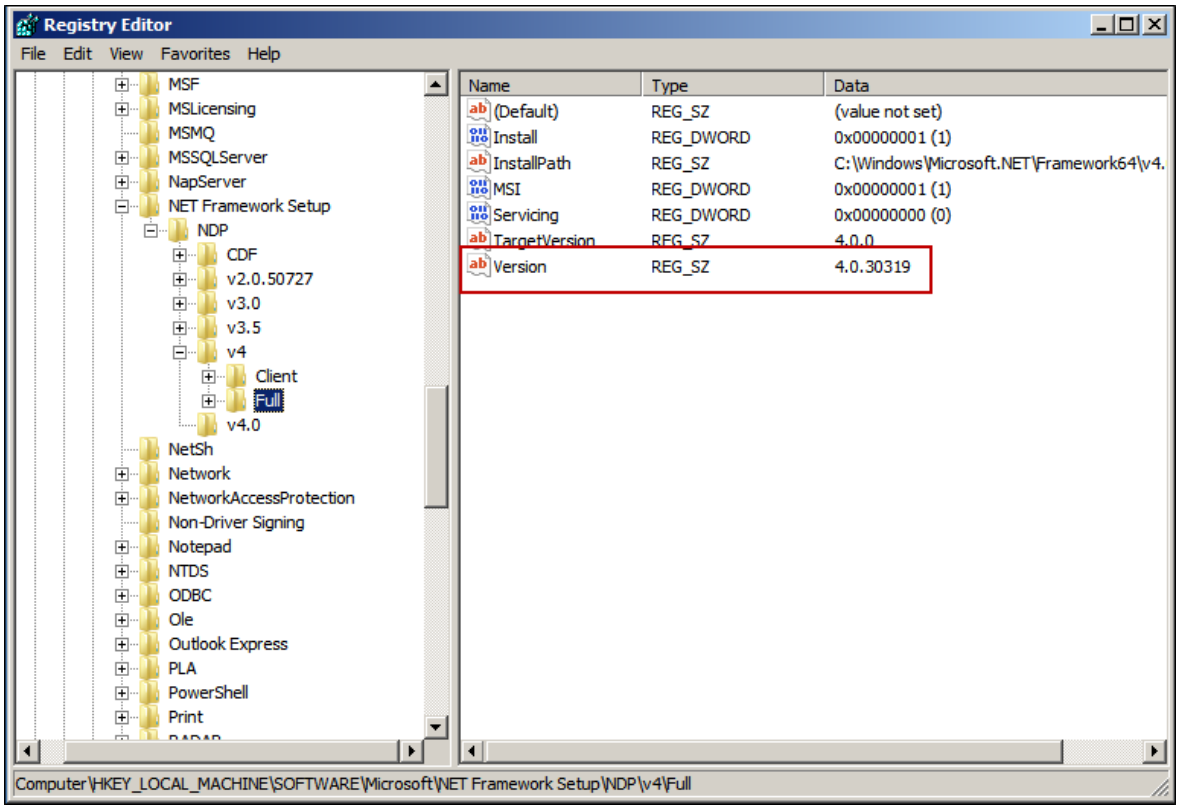
HOW DO I DETERMINE IF THE .NET FRAMEWORK IS ALREADY INSTALLED?

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

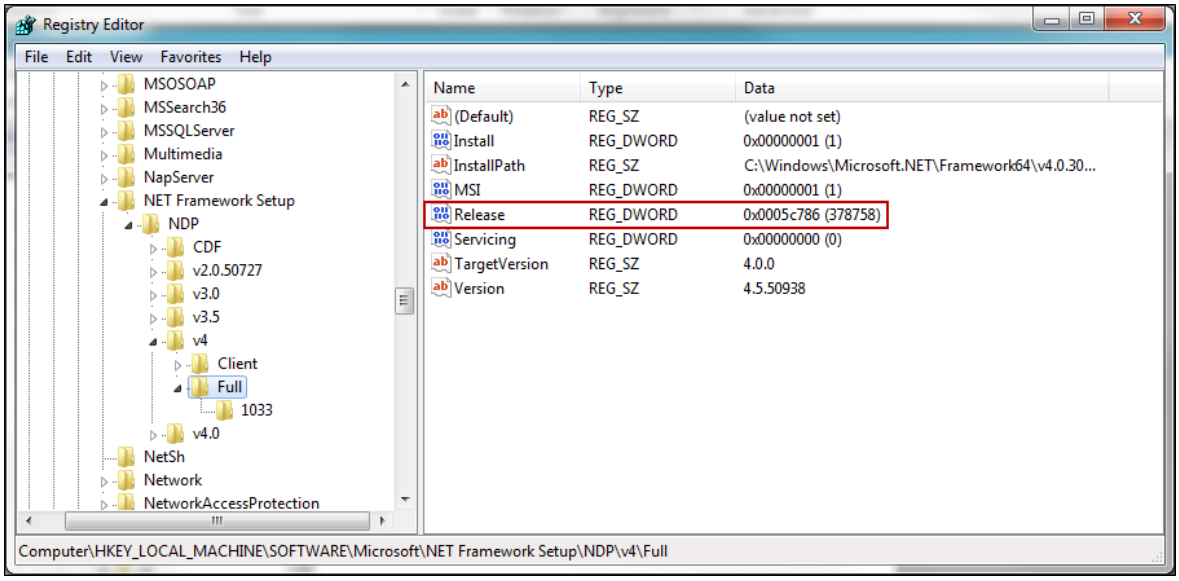
> IMPORTANT: When checking the information below, always make sure you are verifying the version numbers in the in "NET Framework Setup" directory and *not* the ".NET Framework" directory.



- For Version 4.0 Navigate to HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v4\Full. You should see 4.0 or above in the Version row.



- For Version 4.5 Navigate to HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v4\Full. The existence of DWORD in the Release row indicates that .NET 4.5 or above is installed. The number shown in parentheses refers to a specific .NET version (see http://msdn.microsoft.com/en-us/library/hh925568(v=vs.110).aspx).


Registry Editor
File Edit View Favorites Help
MSOSOAP
MSSearch36
MSSQLServer
Multimedia
NapServer
NET Framework Setup
NDP
CDF
v2.0.50727
v3.0
v3.5
v4
Client
Full
1033
v4.0
NetSh
Network
NetworkAccessProtection
Name Type Data
(Default) REG_SZ (value not set)
Install REG_DWORD 0x00000001 (1)
InstallPath REG_SZ C:\Windows\Microsoft.NET\Framework64\v4.0.30...
MSI REG_DWORD 0x00000001 (1)
Release REG_DWORD 0x0005c786 (378758)
Servicing REG_DWORD 0x00000000 (0)
TargetVersion REG_SZ 4.0.0
Version REG_SZ 4.5.50938
Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v4\Full

SHOULD I INSTALL THE FULL PACKAGE OR CLIENT PACKAGE?

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

IIS

Following are frequently asked questions about IIS.

WHAT IS IIS?

Internet Information Services is a web service role that is enabled in the operating system to give the system its web server capabilities. IIS must be installed on the computer that will be acting as your Pulse web server.

HOW DO I DETERMINE IF IIS IS INSTALLED?

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

INSTRUCTIONS FOR USING THE WINDOWS CONTROL PANEL

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

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

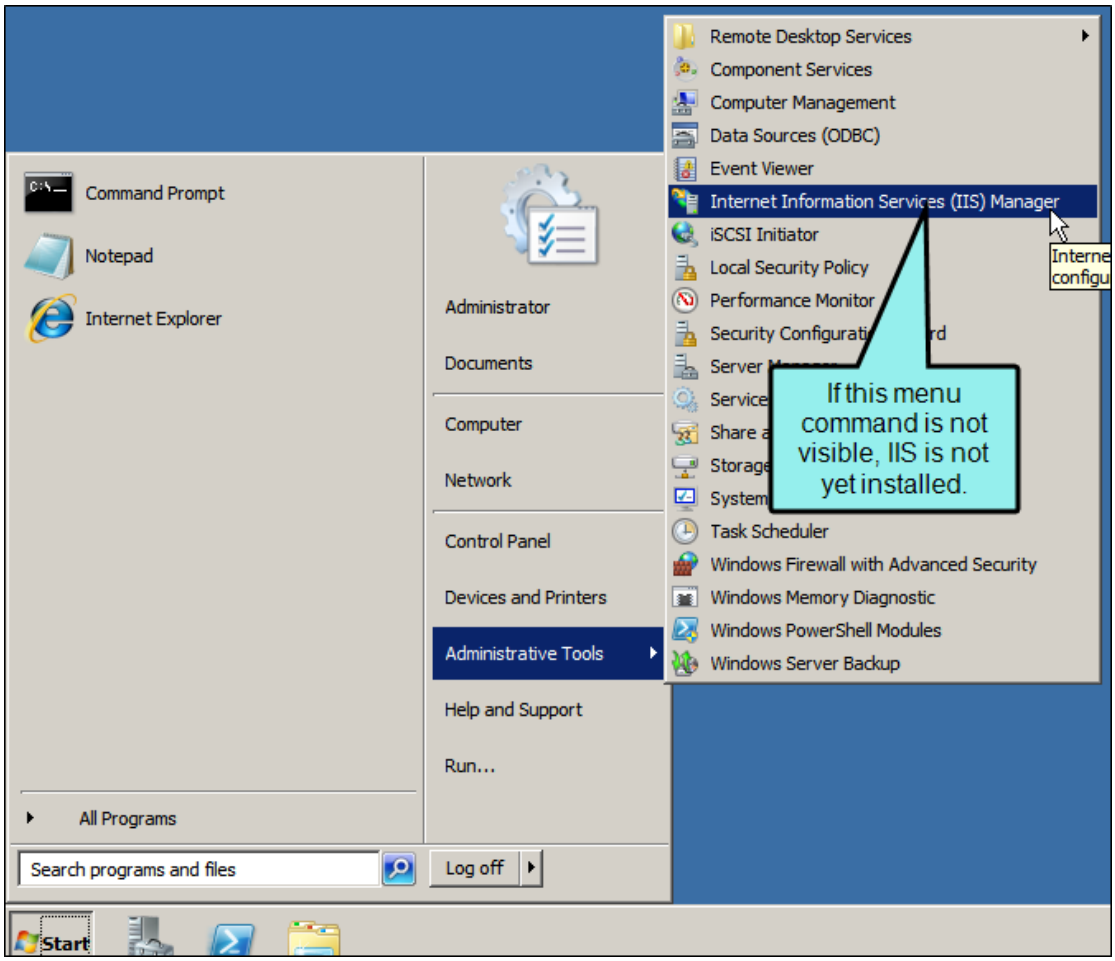
INSTRUCTIONS FOR USING RUN COMMAND

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

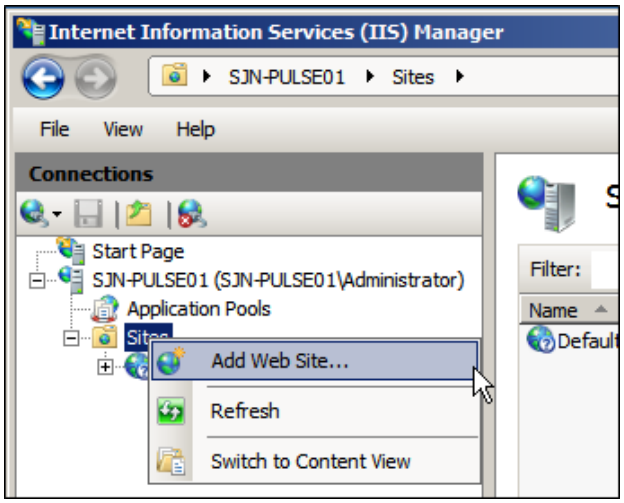
IIS IS ALREADY INSTALLED ON OUR SERVER. HOW DO I CREATE A NEW WEB SITE FOR PULSE IN IIS?

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

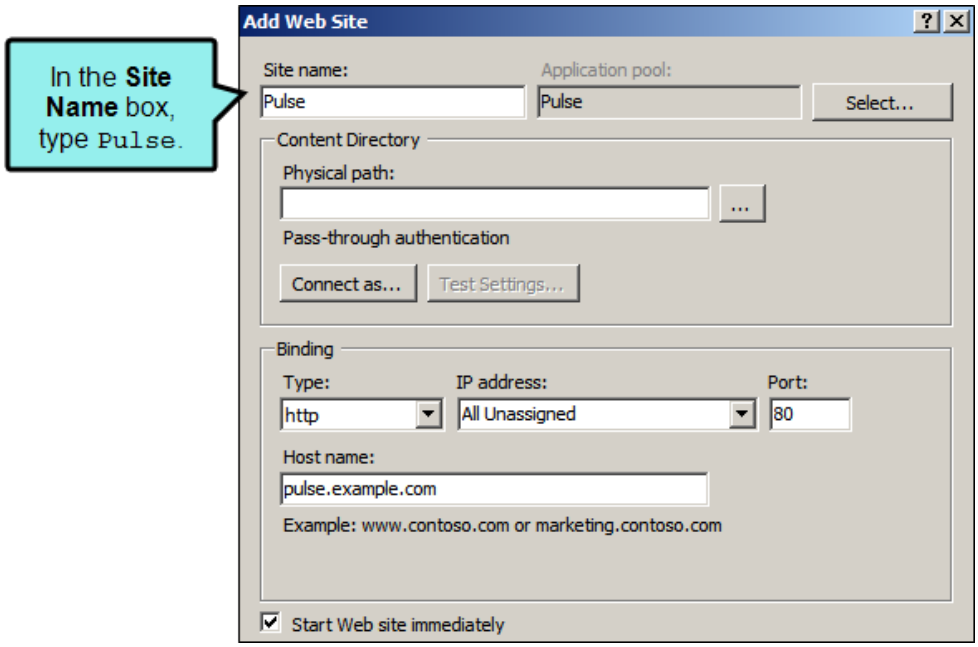
1. Click **Start > Administrative Tools** and select the **Internet Information Services (IIS) Manager**.



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



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



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

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

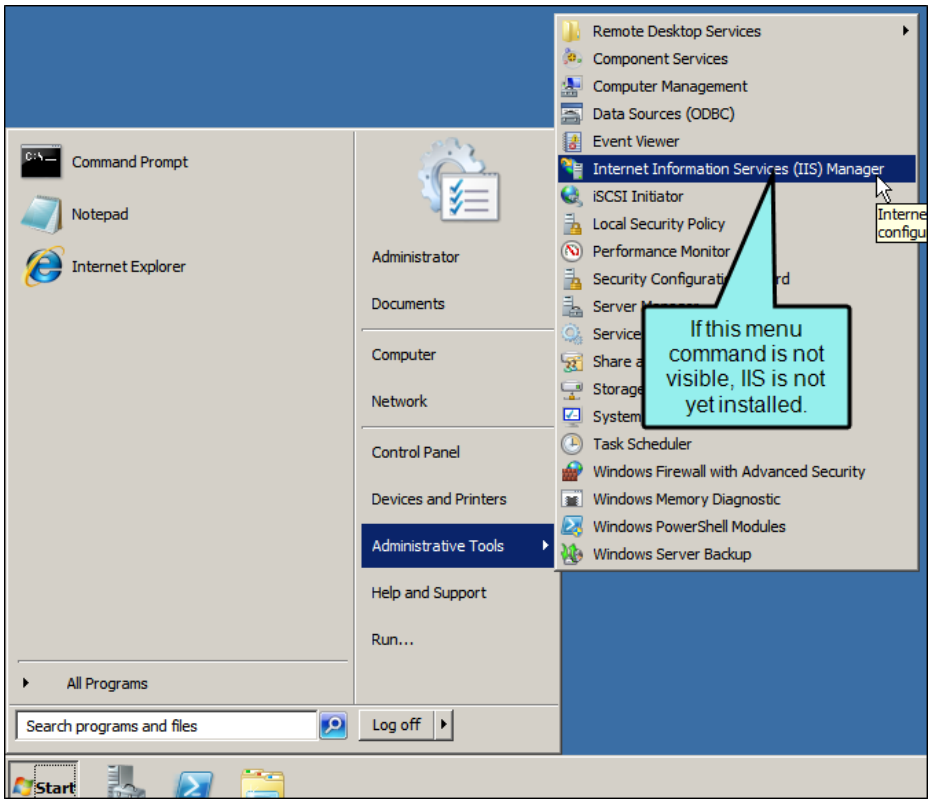
5. In the **Physical path** box, type the physical path to the folder that you want to use as your content directory for Pulse. In this example, we created this folder structure: `%SystemDrive%\pulsepub\wwwroot`.
6. From the **Type** list, select the desired protocol. In this example, we selected **http**.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

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

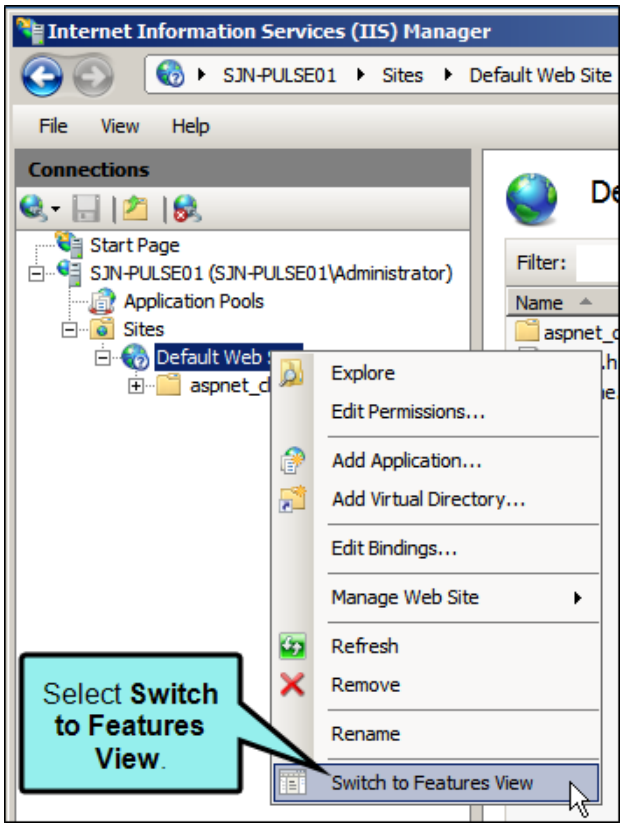
By default, the Default Web Site that Pulse uses to serve your dashboard content requires you type <localhost>/Pulse to gain access your dashboard content. However, you can change the localhost to a domain name, if desired.

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

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

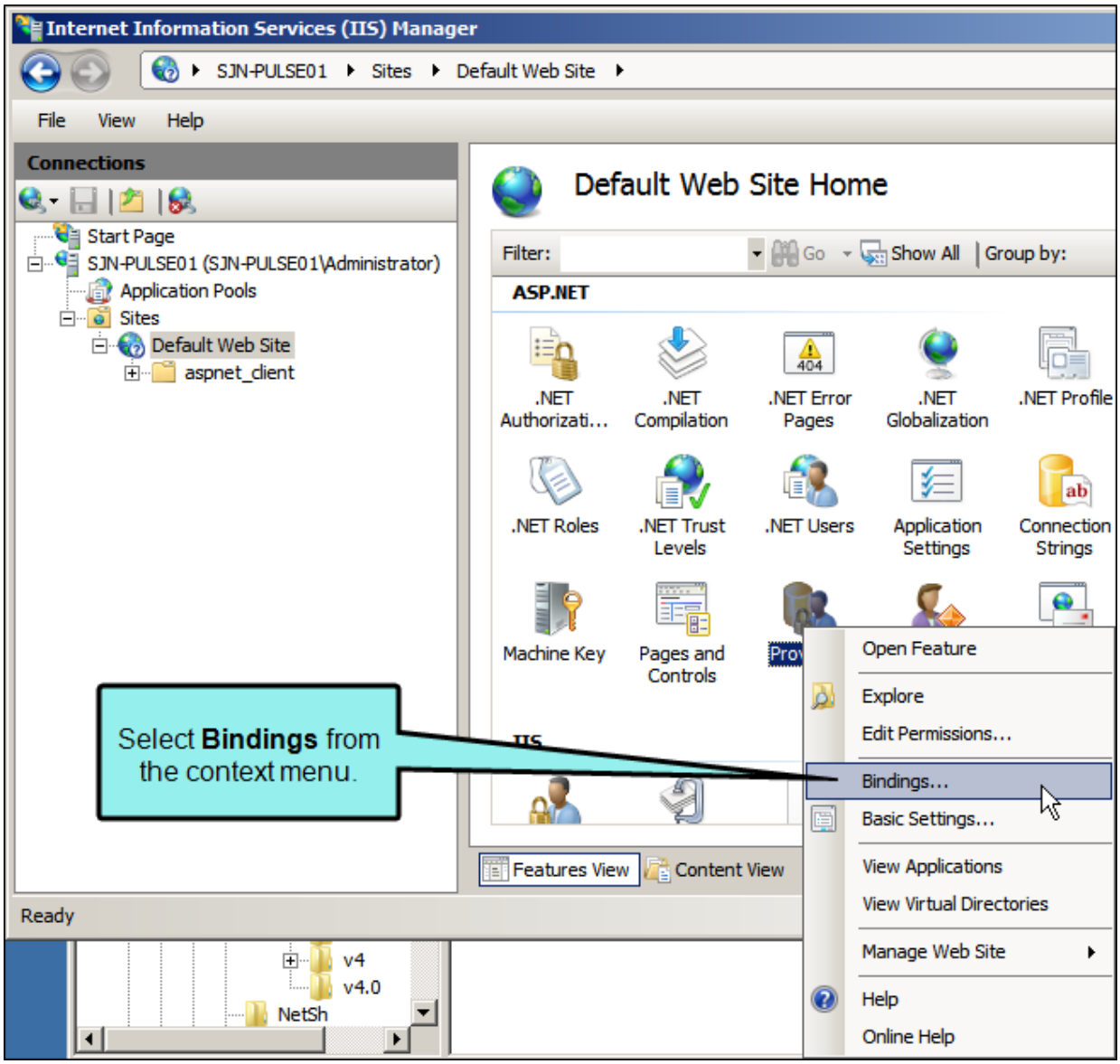


2. Right-click your Pulse web site and select **Switch to Features View** from the menu.

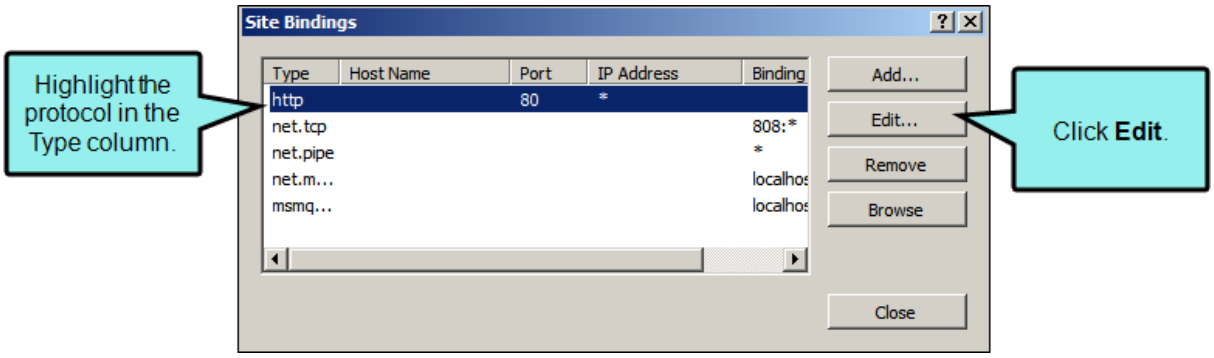


NOTE: In this example, we are using the Default Web Site for Pulse.

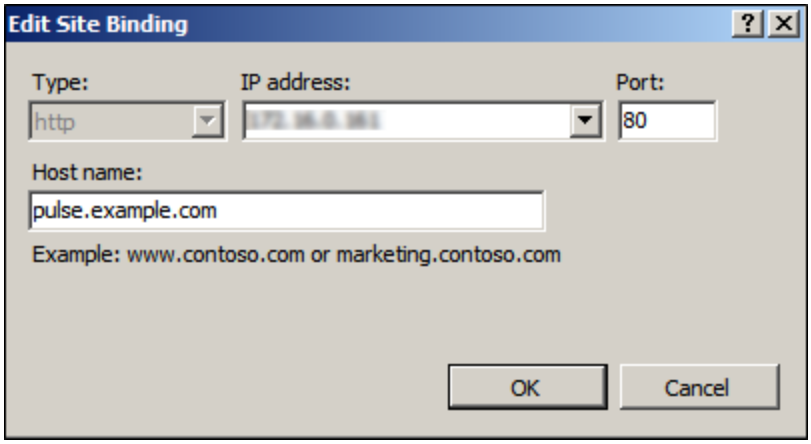
3. In Features View, under the **ASP.NET** area, right-click **Providers** and select **Bindings** from the context menu.



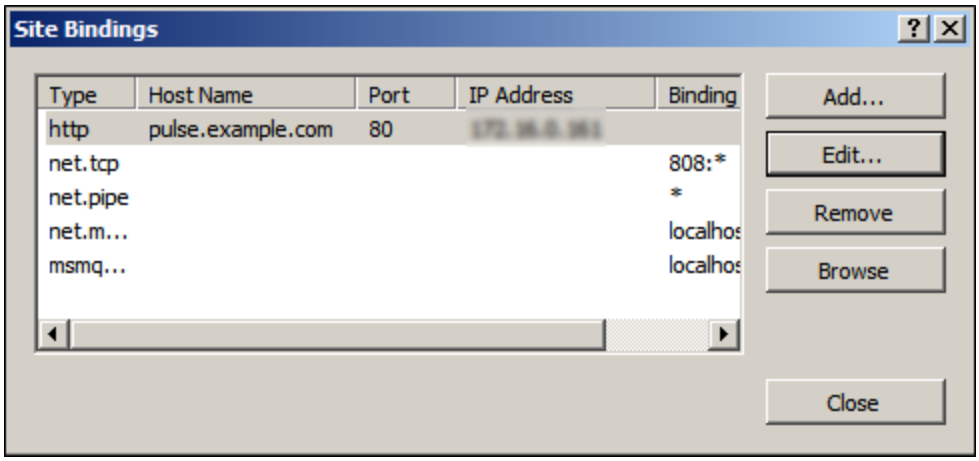
4. In the Site Bindings dialog, highlight the appropriate protocol. In this example, we highlighted the protocol **http** in the Type column. Then click **Edit**.



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



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



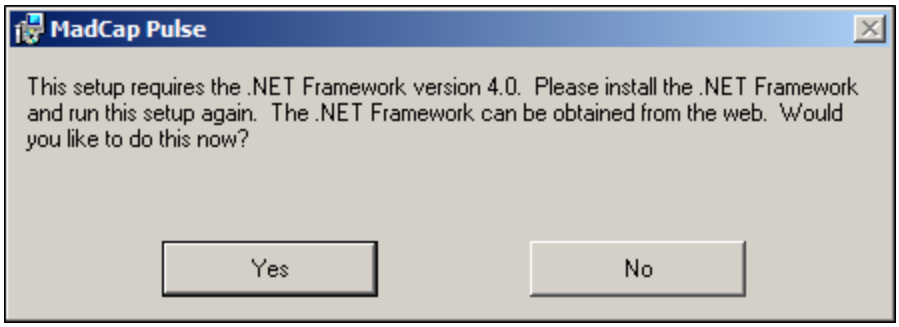
7. Select **File > Exit** to close IIS Manager.

Pulse Setup Program

Following are frequently asked questions about the Pulse setup program.

DO I INSTALL THE .NET FRAMEWORK BEFORE PULSE?

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



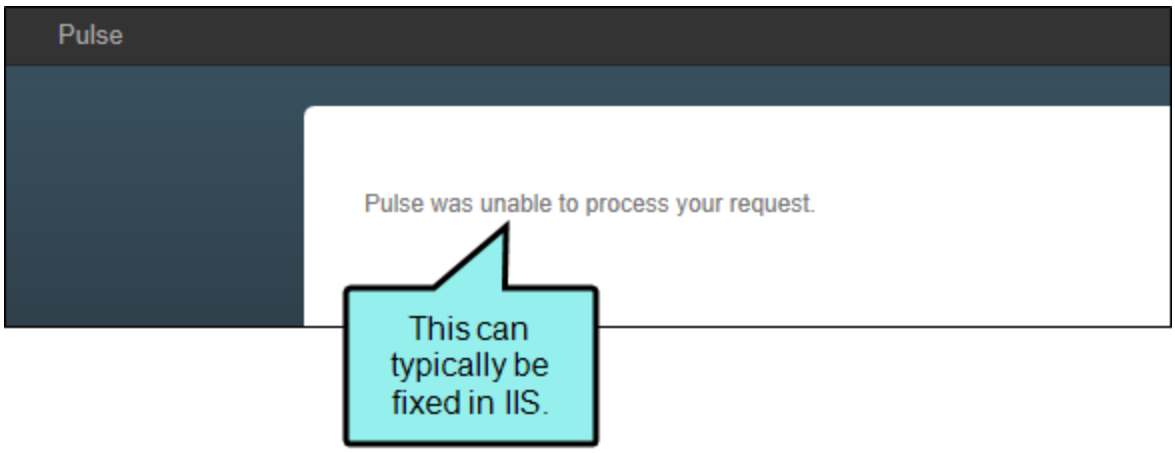
You should click **Yes** in the error message. This will direct you to the Microsoft .NET Framework (Web Installer) page in a new browser window, so you can download and install the framework.

Pulse Server Application

Following are frequently asked questions about the Pulse server application.

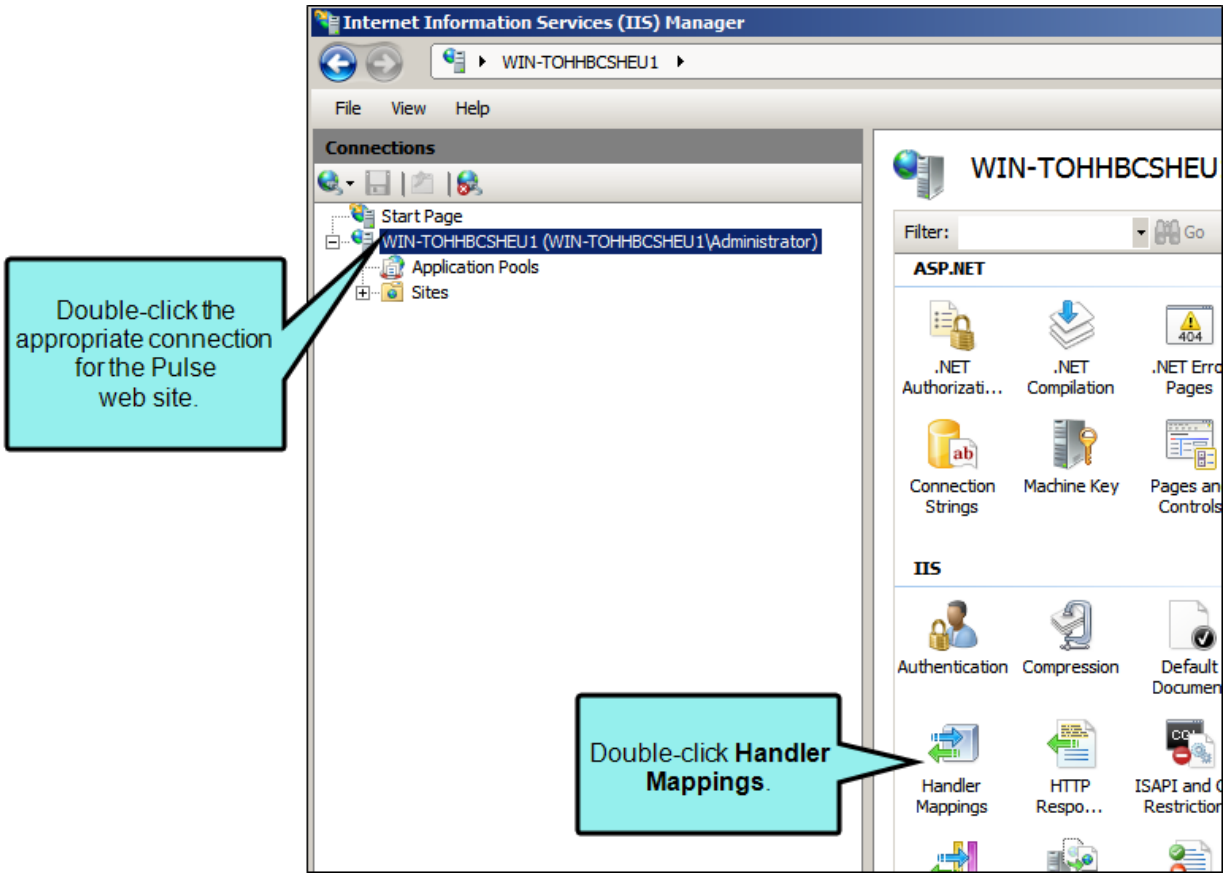
WHY AM I SEEING THE "PULSE WAS UNABLE TO PROCESS YOUR REQUEST" MESSAGE?

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

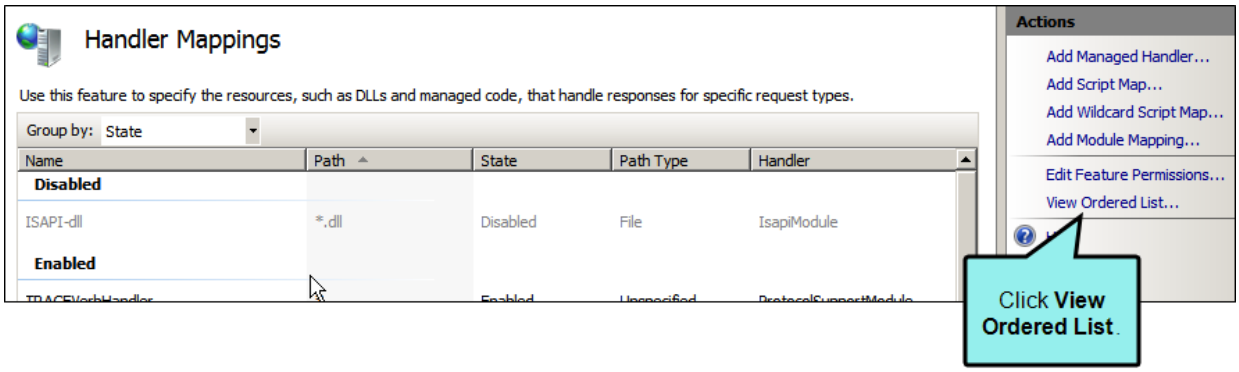


When this message appears, first try refreshing your browser content. If the message still appears, it typically means that IIS is not able to properly handle responses for the ExtensionlessURL resources. This can quickly be resolved in Internet Information Services (IIS) Manager.

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

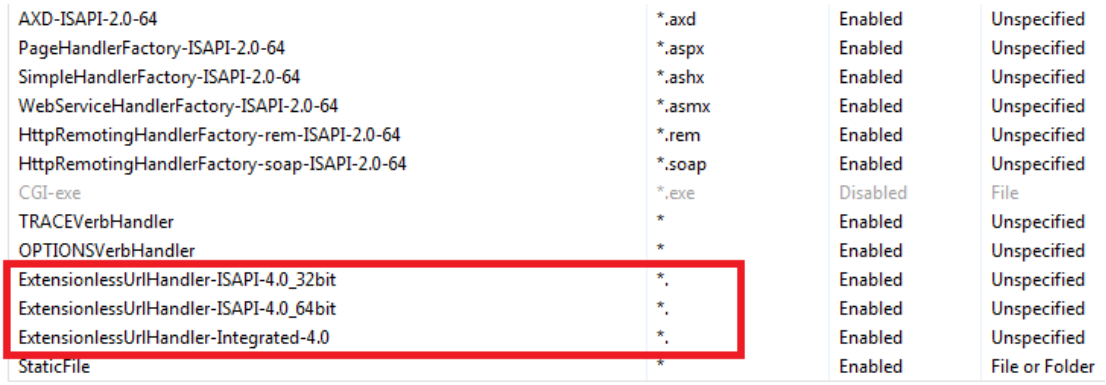


4. In the Actions pane, click **View Ordered List**



5. Look for these mappings in the **Name** column:ExtensionlessUrl-ISAPI-4.0_32bitExtensionlessUrl-ISAPI-4.0_32bitExtensionlessURL-Integrated-4.0

6. Select each mapping individually. Then in the Actions pane, click **Move Down** until all of the mappings are near the bottom of the list, just above StaticFile.

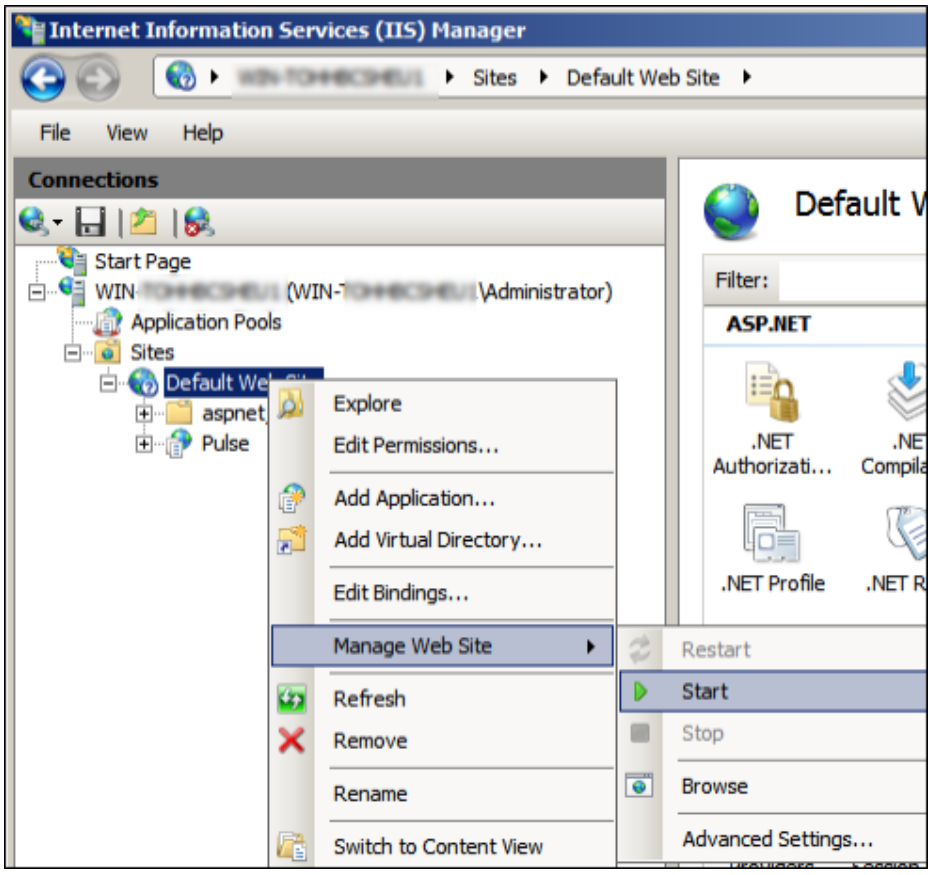


7. Close the IIS Manager.

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

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

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



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

RabbitMQ

Following are frequently asked questions about RabbitMQ.

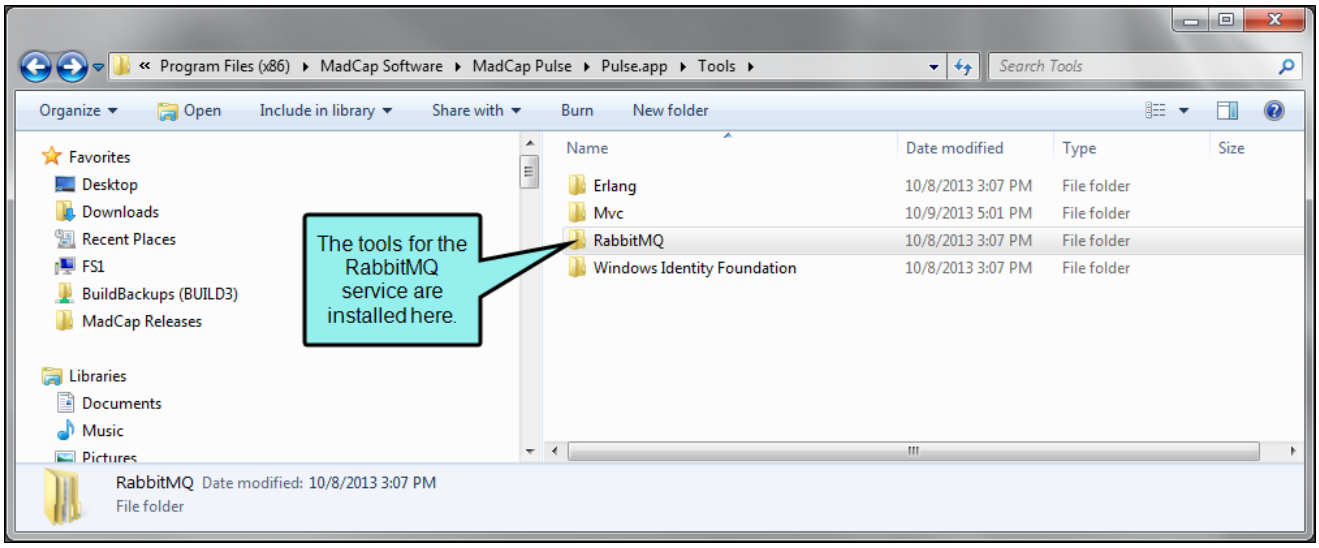
WHAT IS RABBITMQ?

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

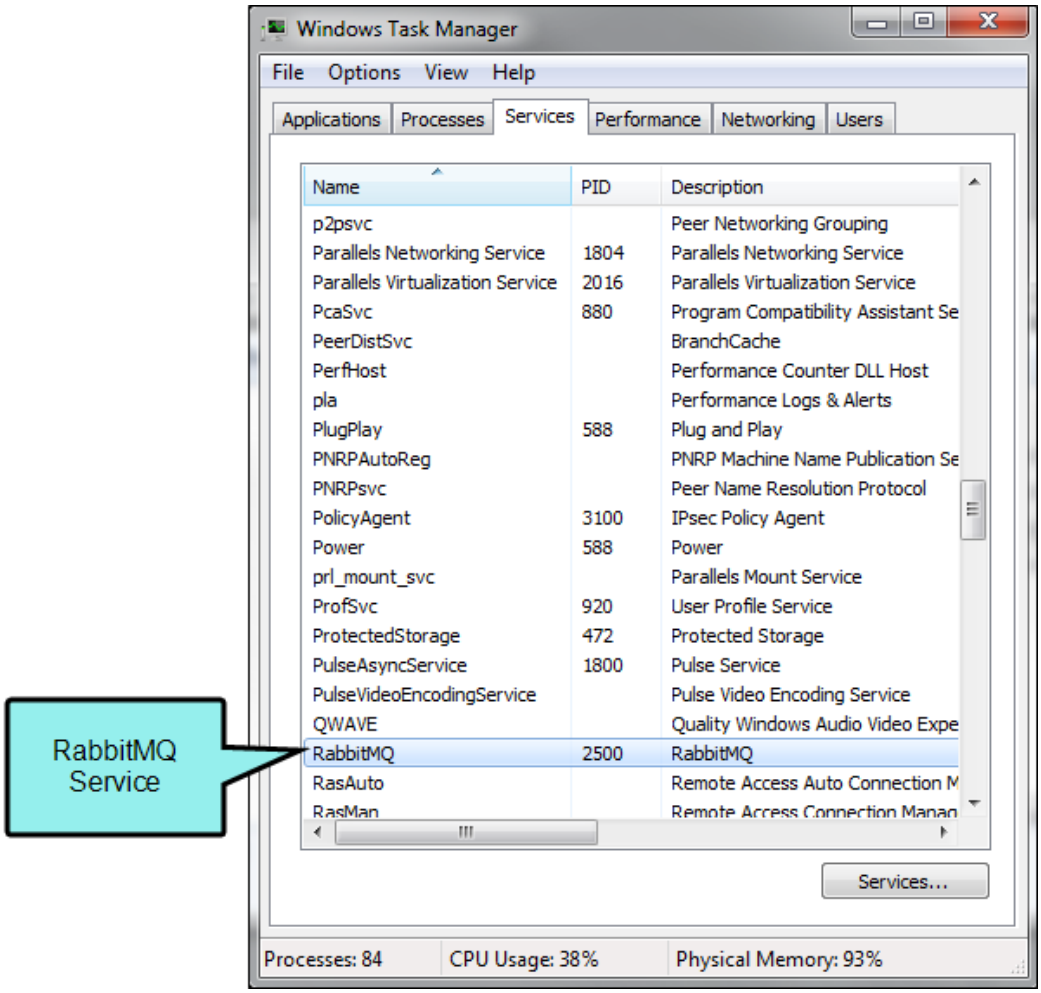
RabbitMQ monitors the amount of RAM on the server, to raise alarms and block connections until the alarm is cleared. This is helpful because it will assist you preventing the server from crashing should free disk space get low.

WHERE IS THE RABBITMQ SERVICE INSTALLED?

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



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



User Administration

Following are frequently asked questions about user administration.

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

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

APPENDIX

PDFs

The following PDFs are available for download from the online Help.

Dashboard Admin Guide

Installation Guide for Windows Server 2008

Installation Guide for Windows Server 2008R2

Installation Guide for Windows Server 2012

Upgrading Guide

User Guide

What's New Guide