madcap software

USER GUIDE

MADCAP PULSE 4

Upgrading

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Upgrading to a New Version

If you are using the previous version of Pulse, you can upgrade to the new version by opening the new Pulse Server application and completing the Configuration Wizard. The primary difference between upgrading and configuring Pulse for the first time is that you will be selecting an existing database, as opposed to creating a new one.

When you are upgrading, you can install the new version of Pulse without first uninstalling the previous version.

HOW TO UPGRADE TO A NEW VERSION OF PULSE

1. Install the new version of Pulse that you have received.
2. Double-click the new MadCap Pulse desktop shortcut to open the Pulse Server application. The MadCap Pulse Configuration Wizard should automatically open.
3. If the MadCap Pulse Configuration Wizard does not automatically open, click **Configure Pulse** in the toolbar.
4. In the Welcome page of the MadCap Pulse Configuration Wizard, click **Next**.
5. 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**.

6. 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.

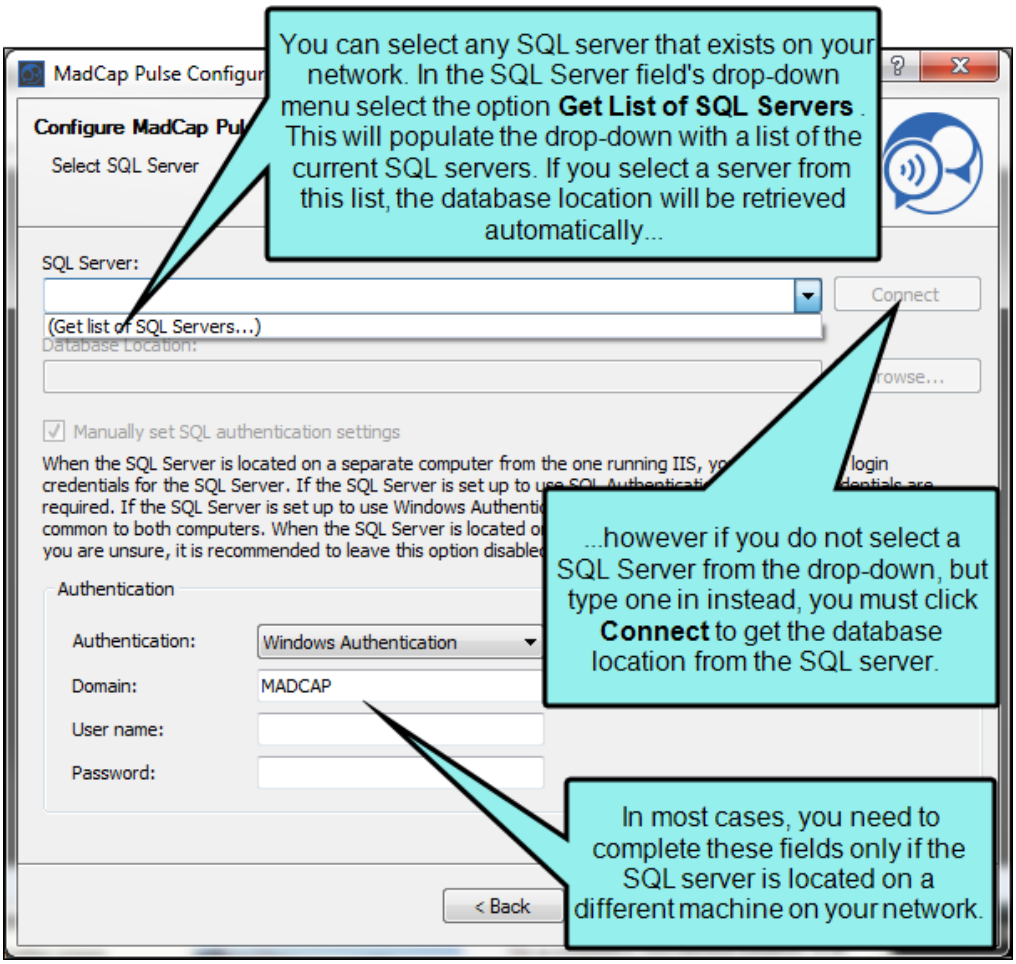
       ### HOW TO TURN ON THE SQL SERVER BROWSER

       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**.

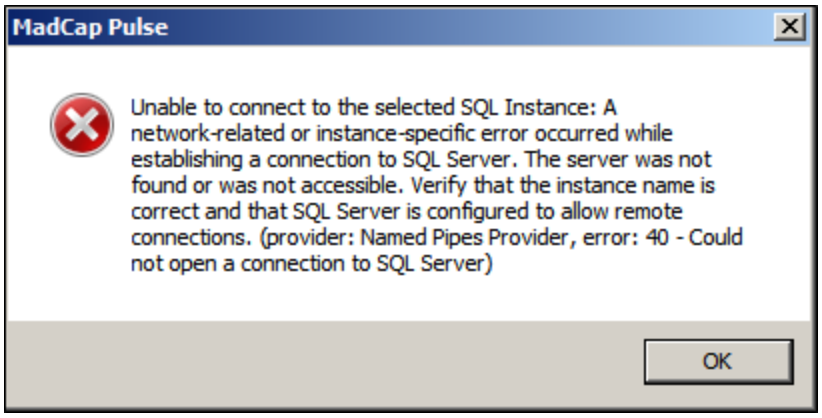
NOTE: You can alternatively enter the IP Address or Computer Name of the server in the **SQL Server** field. Use this format: `<Server Name>\<SQL Instance>` or `<IP Address>\<SQL Instance>`



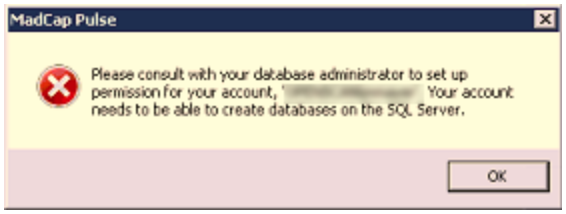
IF YOU ENCOUNTER A CONNECTION FAILURE

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:

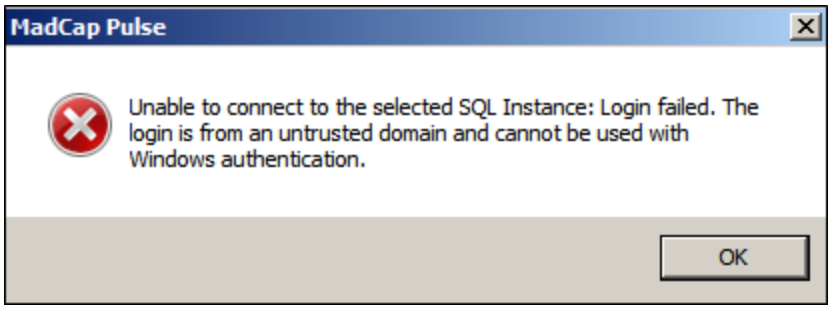
- The SQL Server name and/or instance was entered incorrectly. You must enter the correct server name and instance.



- 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.

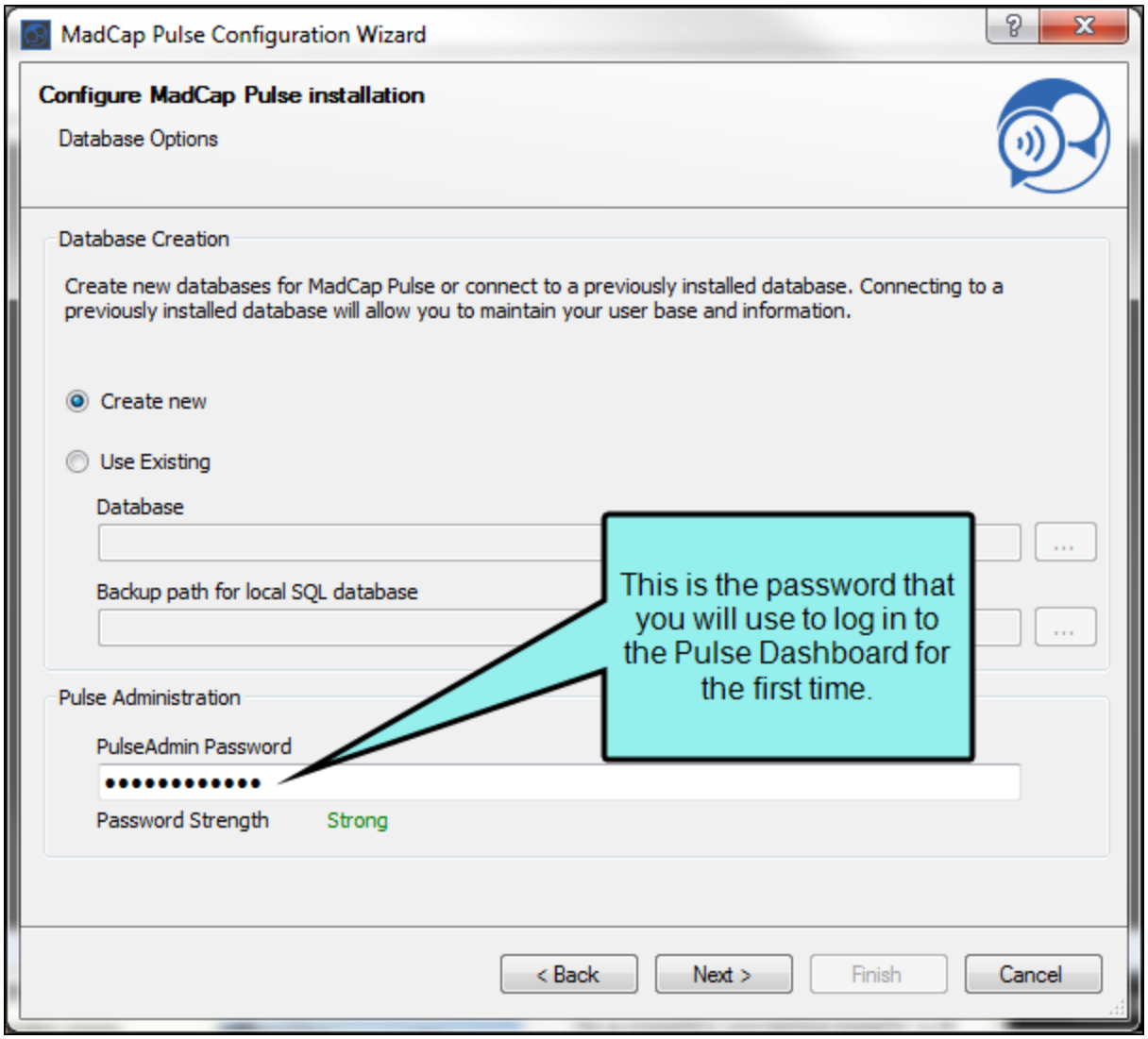


c. If necessary, complete the authentication fields at the bottom of the page.

d. Click **Next**.

7. In the Database Options page, select **Use Existing**. The Select Database dialog opens.
8. Click the **Select Pulse Database ID** drop-down and select the appropriate Pulse key. The communities and users associated with that key are shown in the tabs below so that you can review them to make sure you've chosen the correct key. If the connection takes too long, you can click **Cancel** and then click **Connect** to try again.
9. Click **OK**.
10. 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.

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



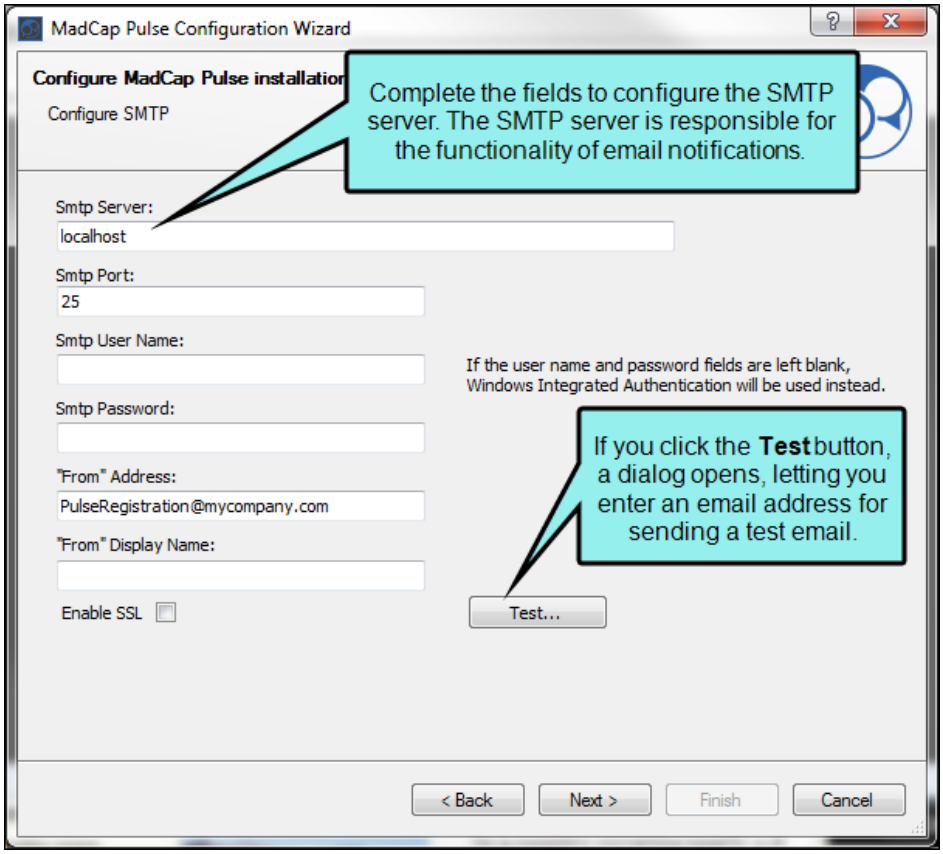
IMPORTANT: Record this password in a safe place. This is the default PulseAdmin account. You will need this information to log into the Pulse dashboard for the first time.

> 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.

12. 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.

13. (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.
14. Click **Next**. The Verify Configuration page appears.
15. 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.
16. When the Configuration Complete page appears, you can click **View Log** or **Save Log** if you want to see or save the results.
17. Click **Finish**.

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