madcap software

USER GUIDE

MADCAP PULSE 4

Dashboard Admin

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CHAPTER 1

Introduction

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

This chapter discusses the following:

Group Dashboards

The Pulse dashboard gives registered users the ability to view and gain access to different features based on the group membership of their user account. See "Managing Groups" on page 83.

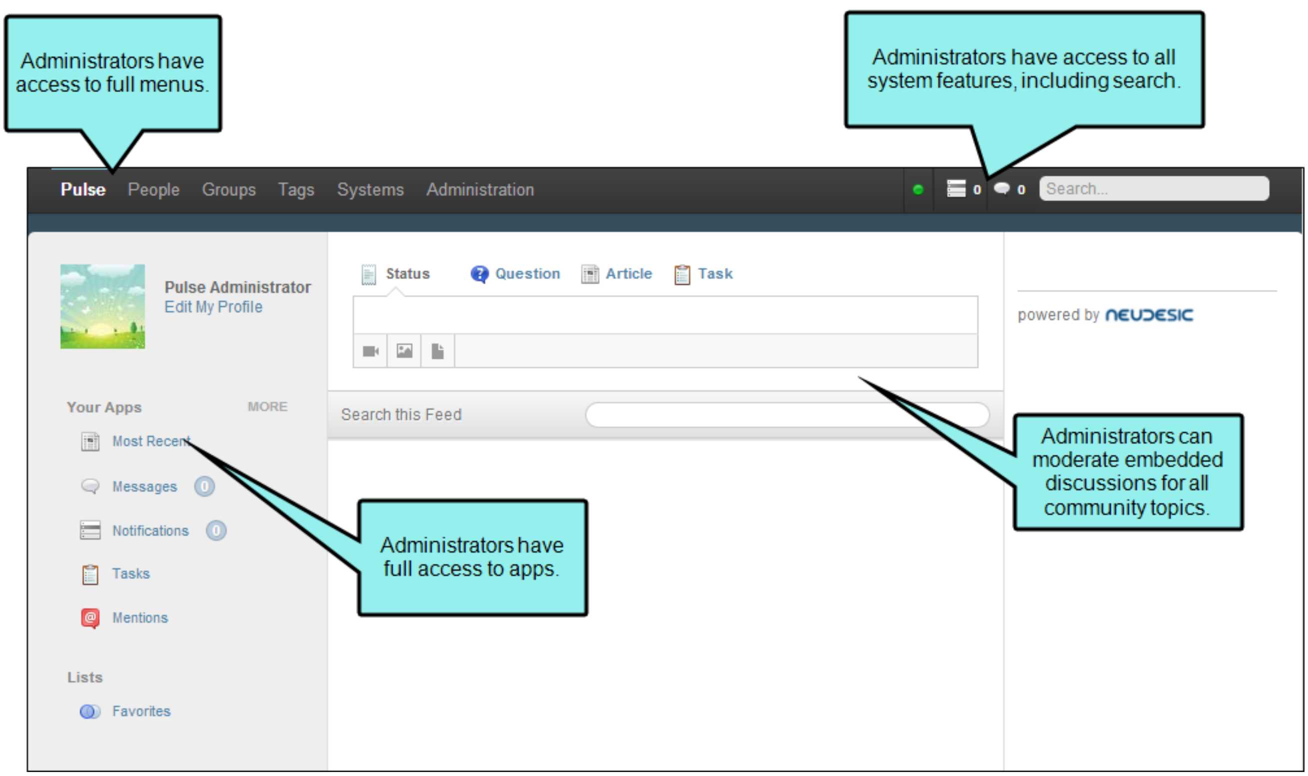
There are three levels of group access available:

ADMINISTRATOR DASHBOARD

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

- PulseAdmin Account This is the default PulseAdmin user account. It is created during the initial server configuration and the person configuring the server sets the password.
- Members of the Administrators Group Registered users who are members of the Administrators group. See "Managing Groups" on page 83.

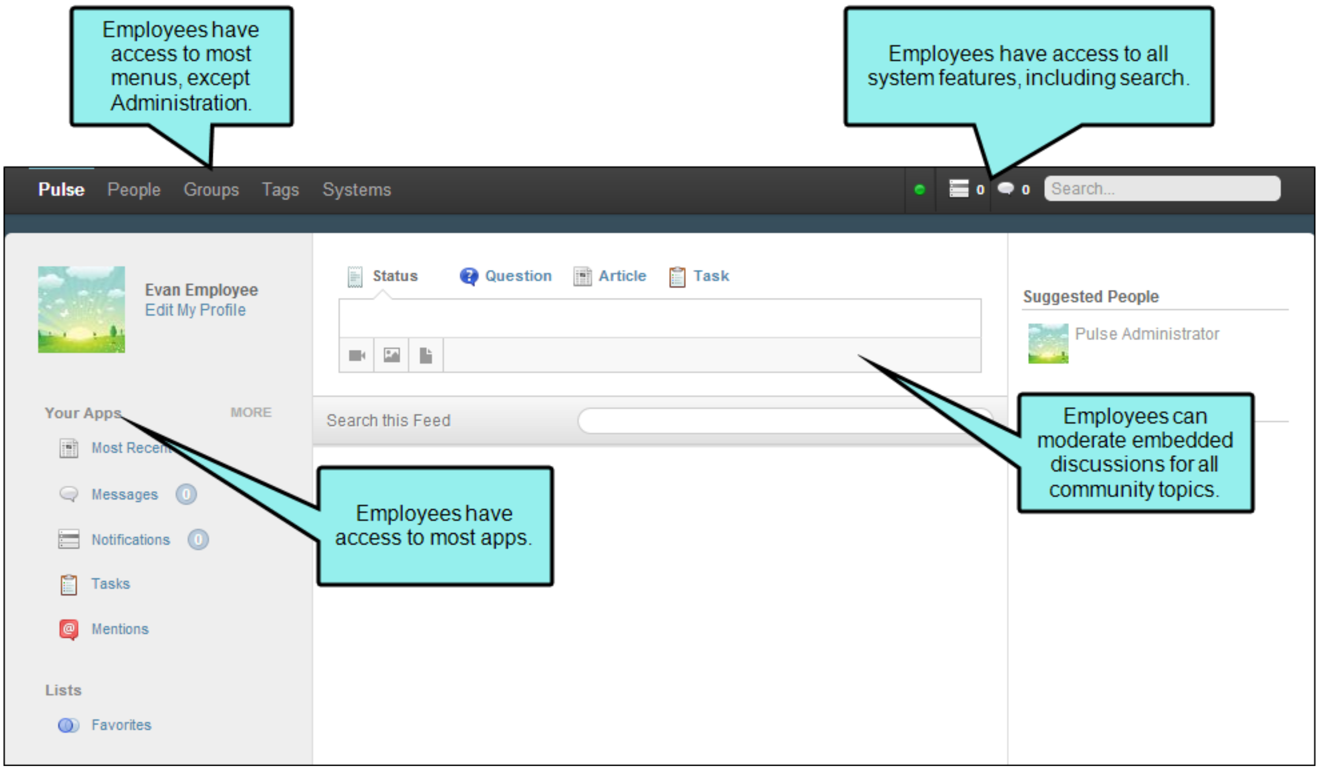
Members of the Administrators group have full access to all dashboard features and options. It is recommended that you limit the number of members in the Administrators group. See "Managing Groups" on page 83.



EMPLOYEE DASHBOARD

The Employee dashboard is available to registered users who have been added as members of the Employees group in Pulse. See "Managing Users" on page 93 and "Managing Groups" on page 83.

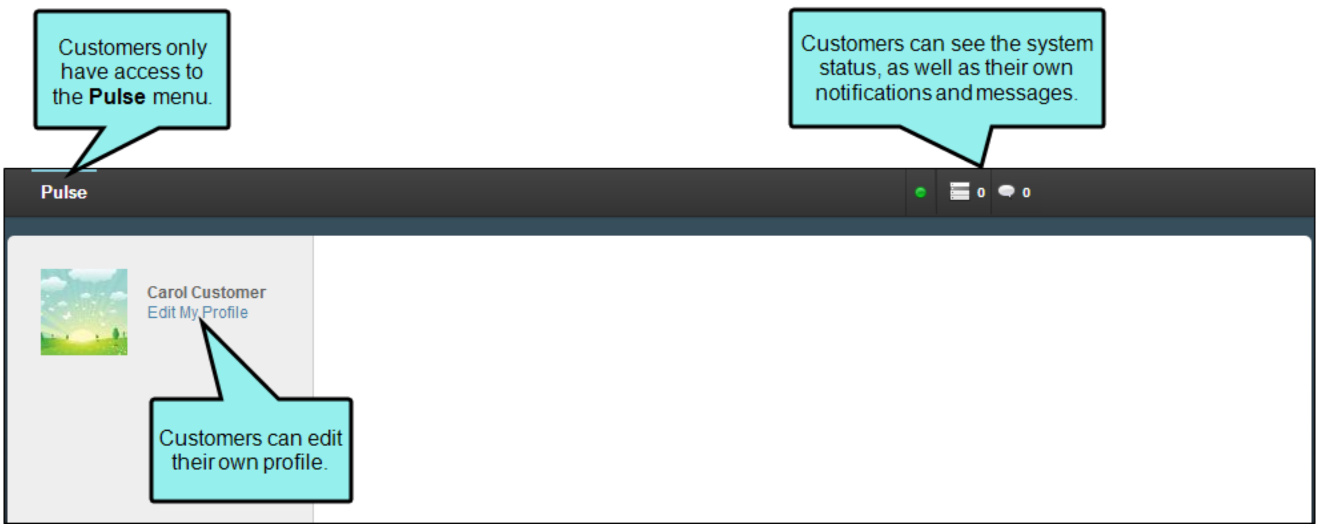
This dashboard provides members with access to a variety of Pulse moderation features and all of the customer-facing community features.



CUSTOMER DASHBOARD

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

- **All Registered Users** All registered Pulse users have access to the features that are available in the Customer dashboard.
- **Members of the Customers Groups** An Administrator can also explicitly add a user as a member of the Customers group.See "Managing Users" on page 93.



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

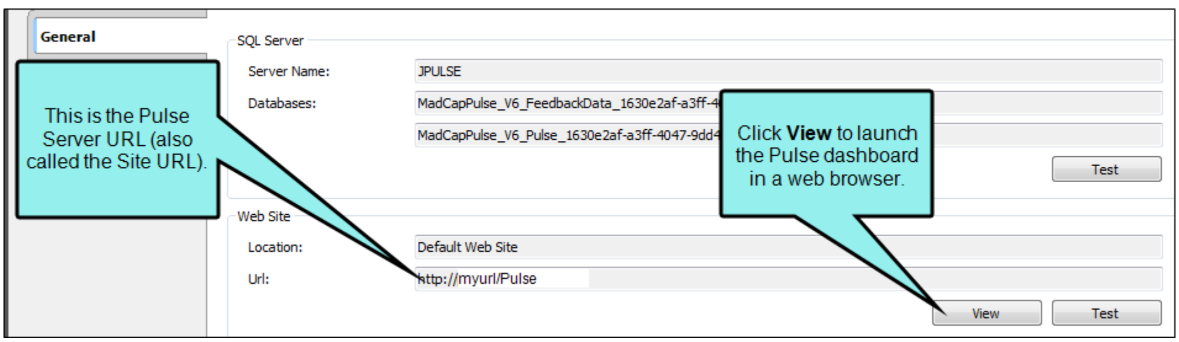
> NOTE: By default, registered users who are not explicitly added to a group are granted the same access privileges as members of the Customers group.

Initial Dashboard Login for Administrators

If this is your first time logging in to the Pulse dashboard, you must log in with the PulseAdmin account that was created during the initial server configuration.

HOW TO INITIALLY LOG IN TO THE DASHBOARD

1. In a web browser, navigate to the Pulse Server URL. If you do not know the Pulse Server URL:
    a. Log in to the Pulse web server as the server administrator.
    b. Double-click the MadCap Pulse desktop shortcut. The starts the Pulse application on the server.
    c. In the Pulse Server Configuration window, the Pulse Server URL appears in the **Web Site** area in the **URL** box.
    d. Click the **View** button to launch the Pulse dashboard.

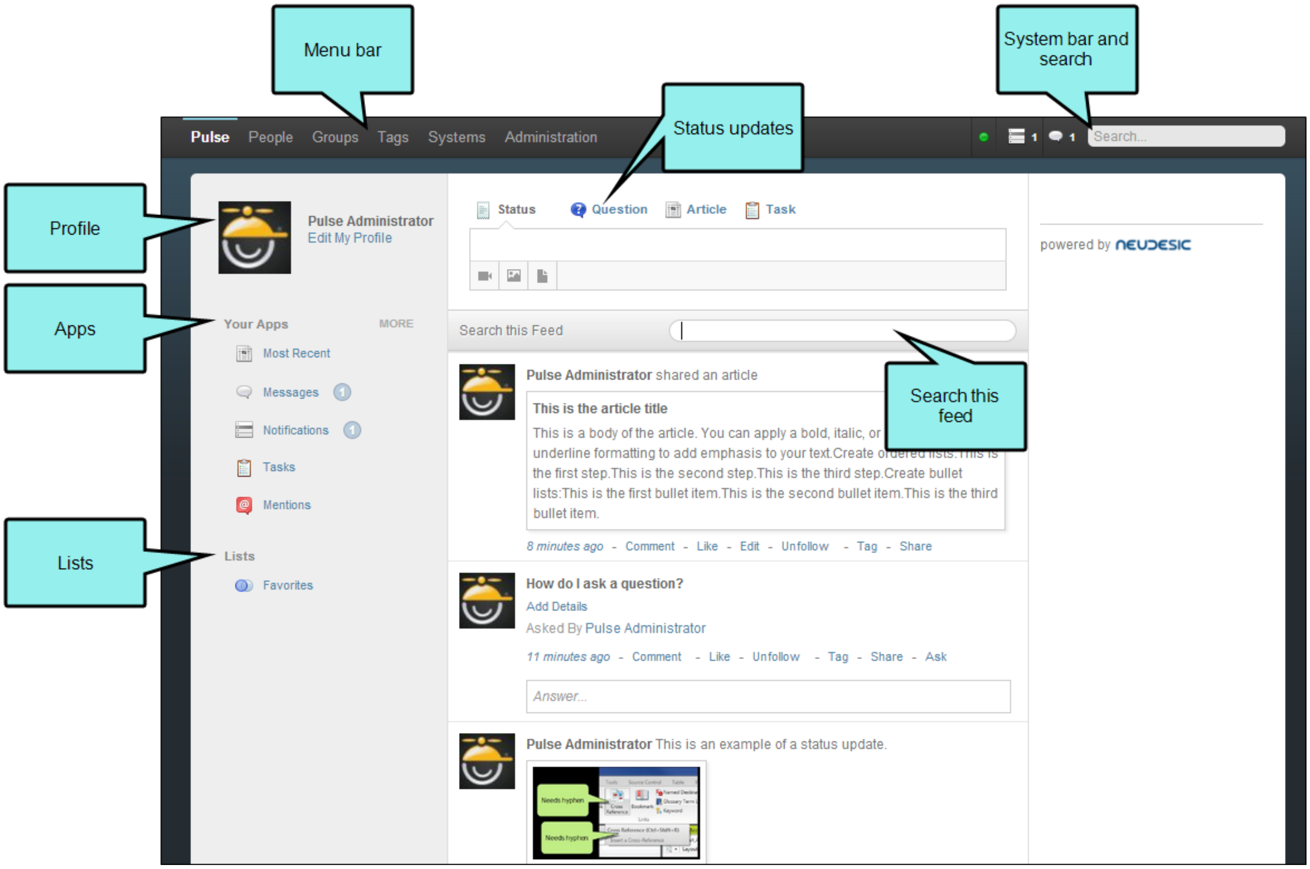


2. In the Pulse Account Login page, do the following:
    a. In the **Email Address** box, type: `PulseAdmin`.
    b. In the **Password** box, enter the password that you created during the initial server configuration.
3. Click **Login**.

After logging in to the Pulse dashboard for the first time, you should create at least one administrator account before you start inviting users to join Pulse. See "Managing Users" on page 93.

Dashboard Structure

The Pulse dashboard consists of several areas:



MENU BAR

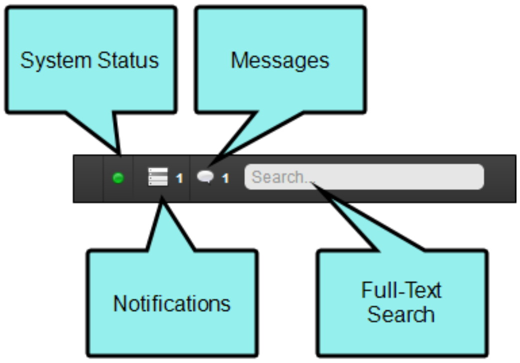
Across the upper-left of the Pulse dashboard is the menu bar. The menus and commands that are accessible to you depend on your group membership. This table details the general availability of the Pulse dashboard menus:

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

Menus	Commands	Customers Group	Employees Group	Administrators Group
Administration	Settings	✗	✗	✓
	Reports	✗	✗	✓

SYSTEM BAR AND SEARCH

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

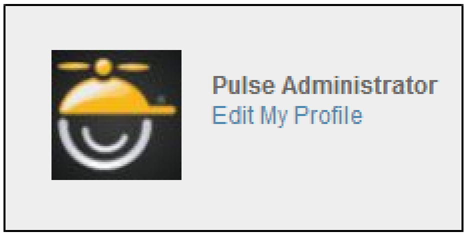


This table details the availability of the system bar and search functions:

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

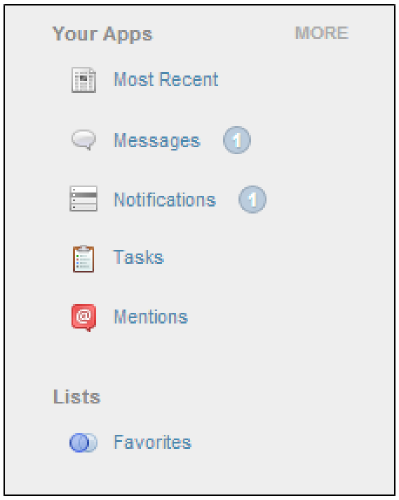
PROFILE

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

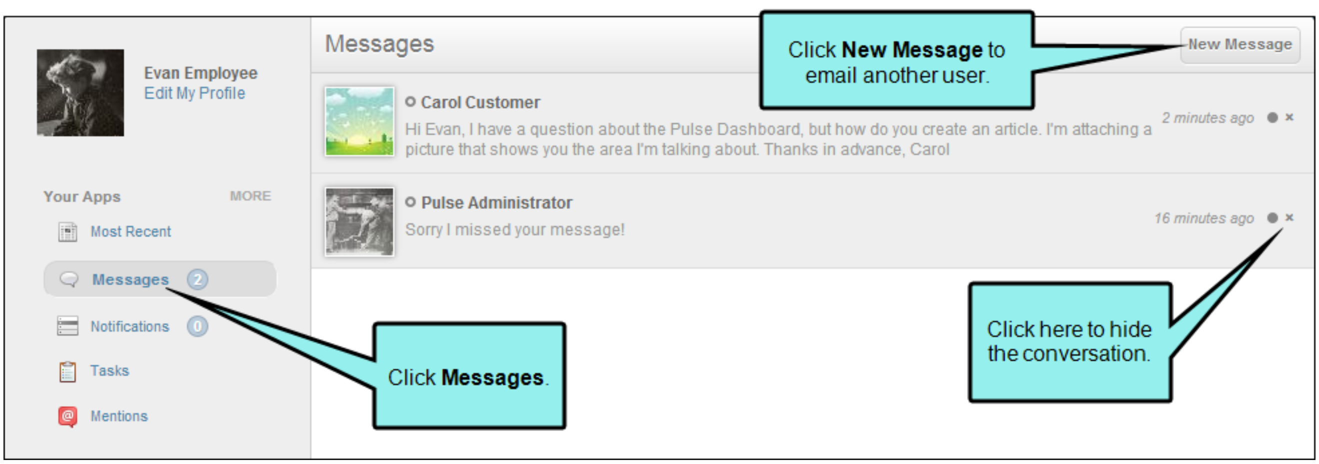


YOUR APPS AND LISTS

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



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



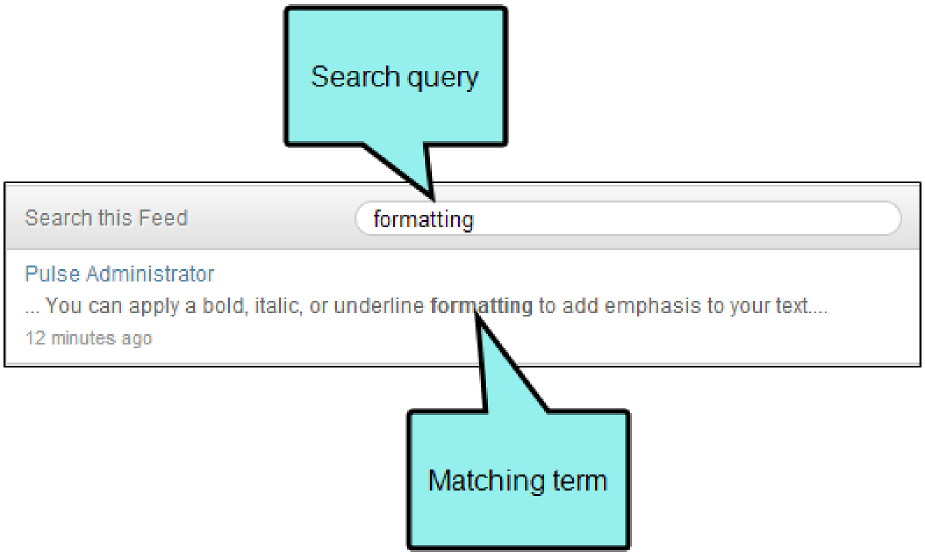
Your Apps	Description
Most Recent[1]	Shows your most recent posts.
Files	Upload files to share with others, and download files.
Messages[1]	Shows a list of all system conversations. This includes both chat messages and email messages.
Notifications [1]	Shows all of the notifications about system events. You can turn notifications on and off by clicking **Edit My Profile** and then selecting the **Notifications** tab.
Moderation	View content that is pending (i.e., awaiting moderation).
Tasks[1]	Shows a list of tasks assigned to you.
Mentions[1]	Lists posts where you are mentioned.
Top News	Shows the top news.
Read it Later	Lists items you have marked to read later.
Statuses	Shows the latest updates posted to the selected feed.
Questions	Shows a list of all your posted questions.
Articles	Shows a list of all your posted articles.
Profile	Opens the Profile Editor.
[1]This displays in the Your Apps list by default.	

STATUS UPDATES

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

SEARCH THIS FEED

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



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

CHAPTER 2

Using the Pulse Menu

AVAILABLE TO: Administrators, Employees, and Customers

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

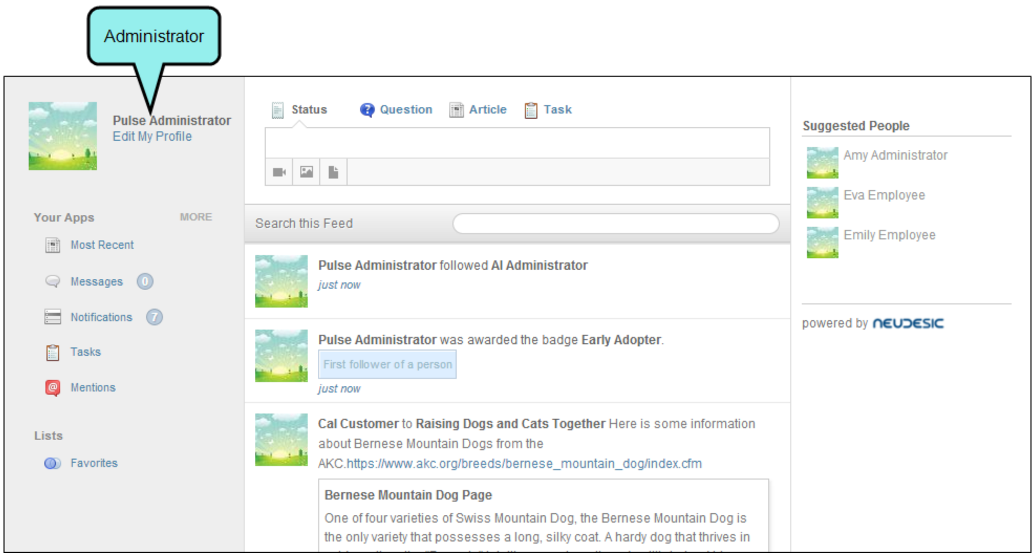
This chapter discusses the following:

Home

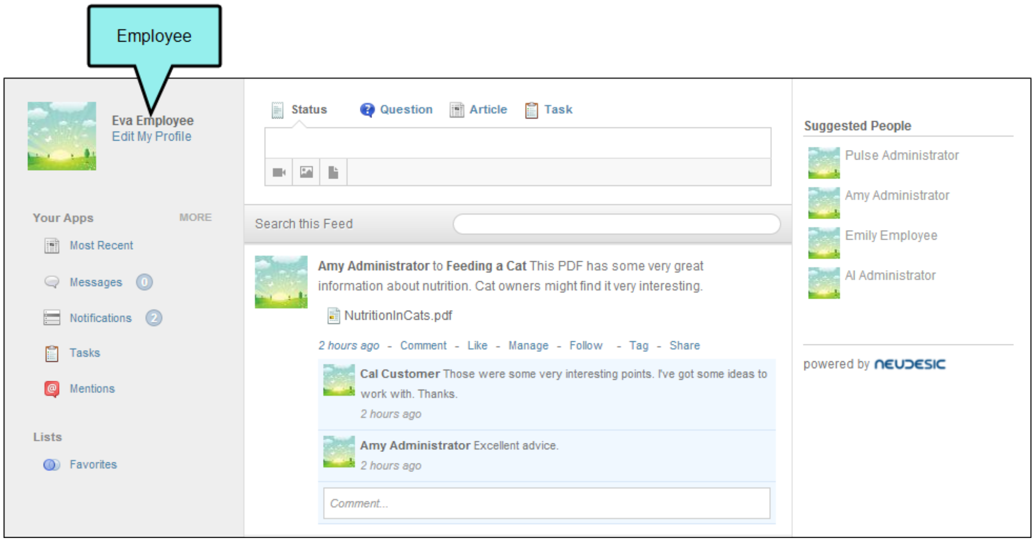
Select **Pulse > Home** to open your personalized Home page. The options available to you in the Home page depend on your user account's group membership. See "Managing Groups" on page 83.

EXAMPLES

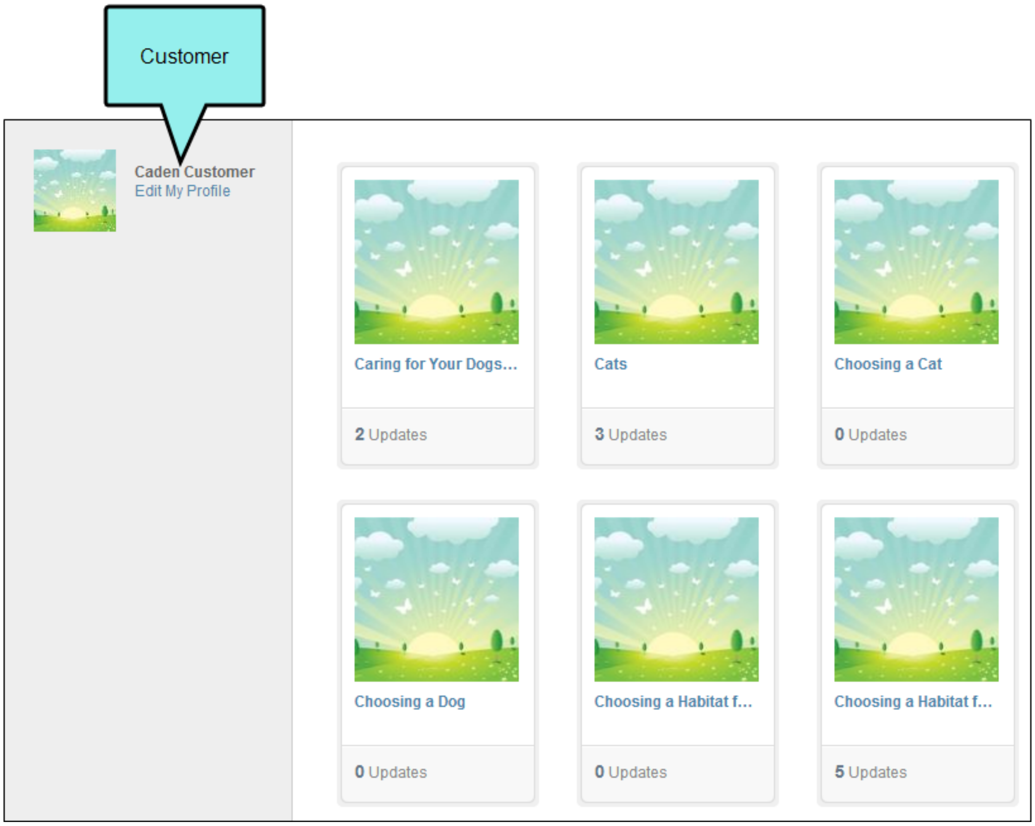
Home page options for members of the Administrators group:



☆ Similar options are available for members of the Employees group:



Limited options are available for members of the Customers group:



Messages

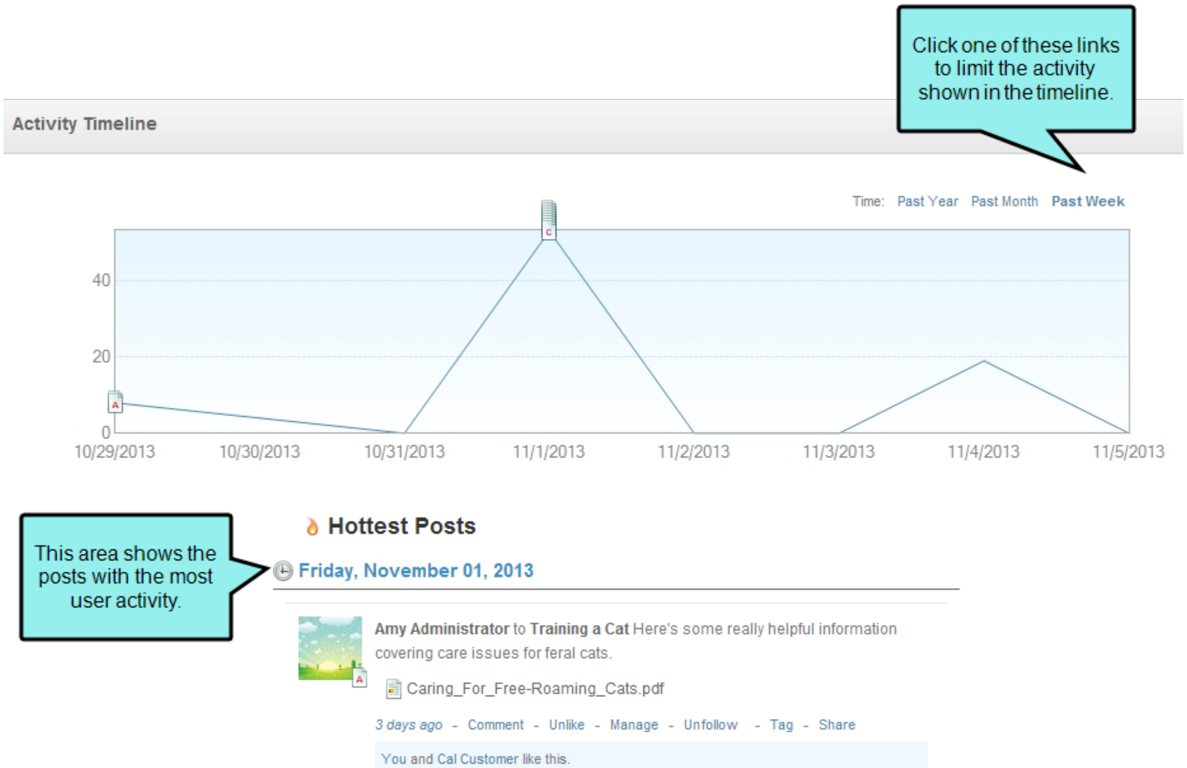
Select **Pulse > Messages** to open the Messages page. This lets registered users create and send messages to other registered users.

Profile

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

Timeline

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



Logout

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

CHAPTER 3

Using the People Menu

AVAILABLE TO: **Administrators** and **Employees**

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

This chapter discusses the following:

Menu Commands

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

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

Finding People

Use the following steps to find registered users.

HOW TO FIND PEOPLE

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

HOW TO FILTER THE FIND PEOPLE LIST

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

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

HOW TO SEARCH FOR PEOPLE

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

CHAPTER 4

Using the Groups Menu

AVAILABLE TO: Administrators and Employees

This chapter discusses the following:

Menu Commands

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

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

Understanding Groups

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

Finding Groups

Use the following steps to find groups.

HOW TO FIND GROUPS

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

   ### HOW TO FILTER THE FIND GROUPS LIST

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

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

   ### HOW TO SEARCH FOR A GROUP

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

   ### HOW TO CREATE A GROUP

   To create a group, click the **Create Group** link at the bottom of the page.
4. Click on any of the groups to open the Groups page.

Joining and Participating in Groups

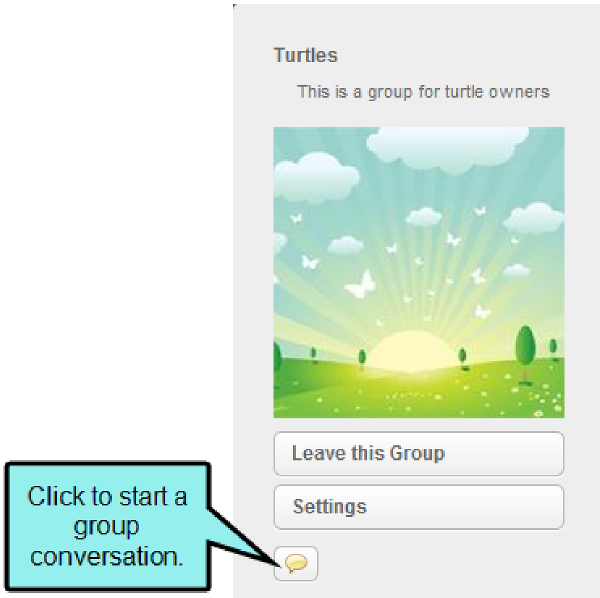
You can join groups; chat with members; view recent updates, members, and tags; subscribe to group feeds; and add feeds to your favorites.

HOW TO JOIN OR LEAVE A GROUP

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

HOW TO CHAT WITH GROUP MEMBERS

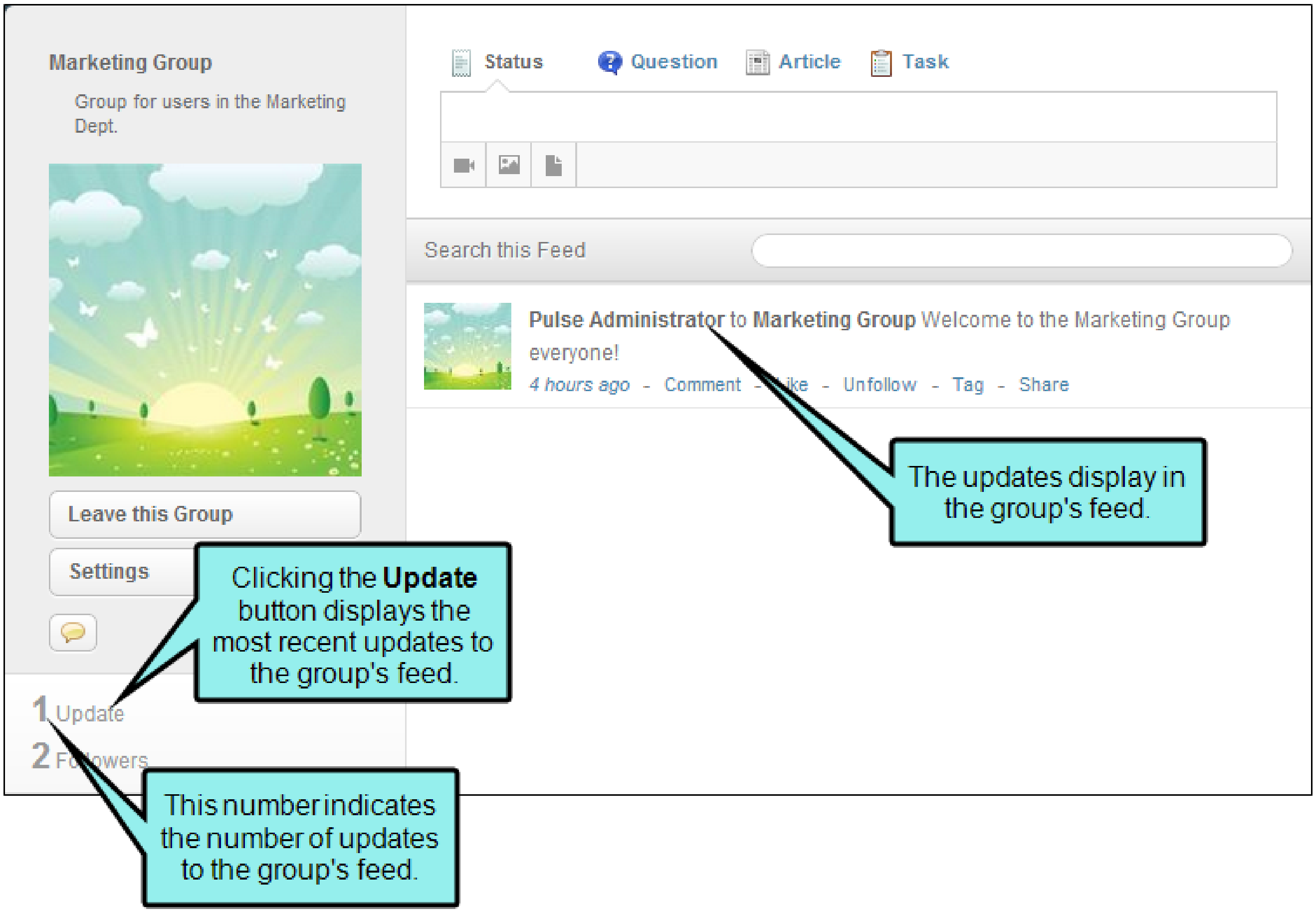
1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Groups > Find Groups**.
3. In the Find Groups page, click the desired group to open its page.
4. Click  to start a group conversation.



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

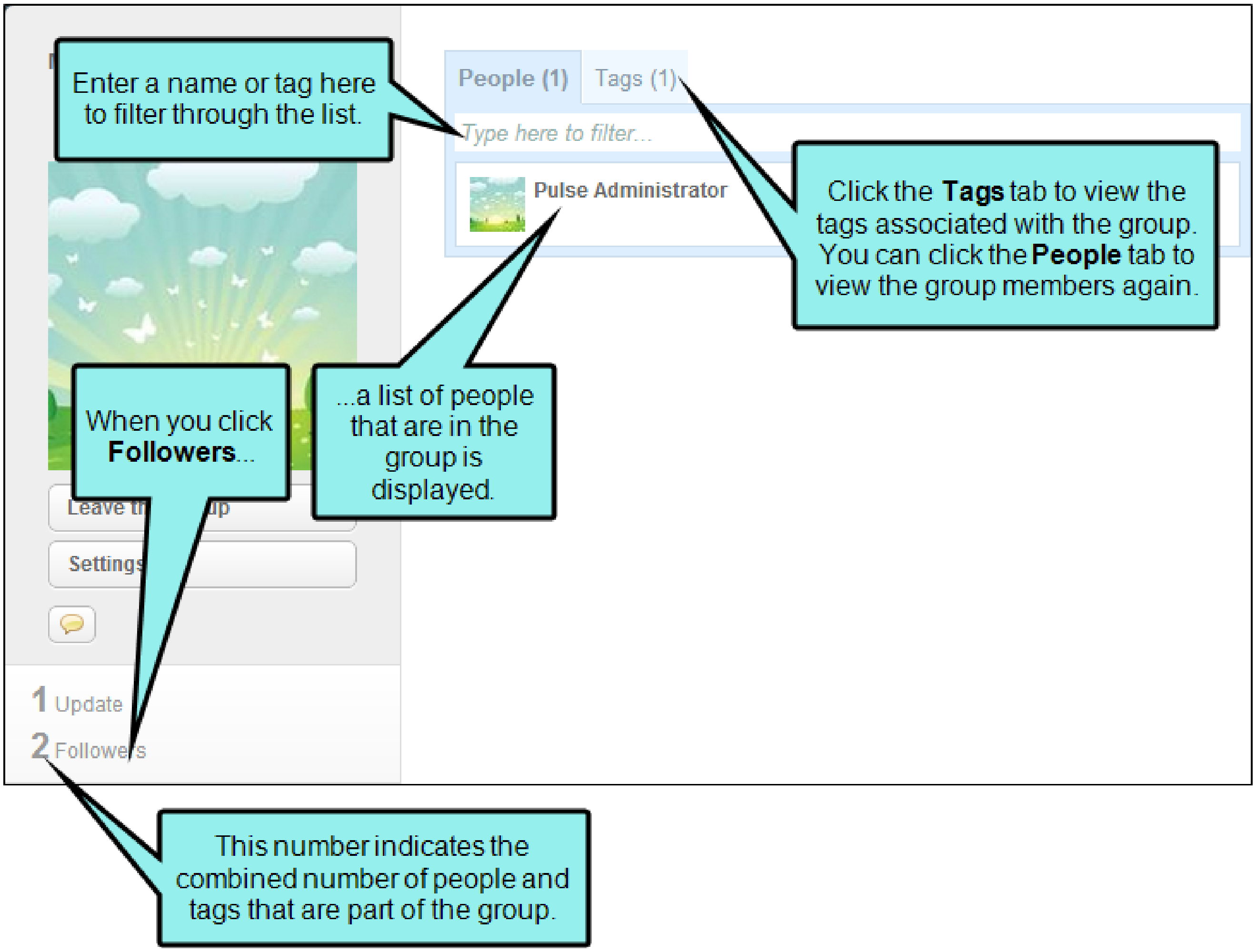
HOW TO VIEW RECENT UPDATES

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



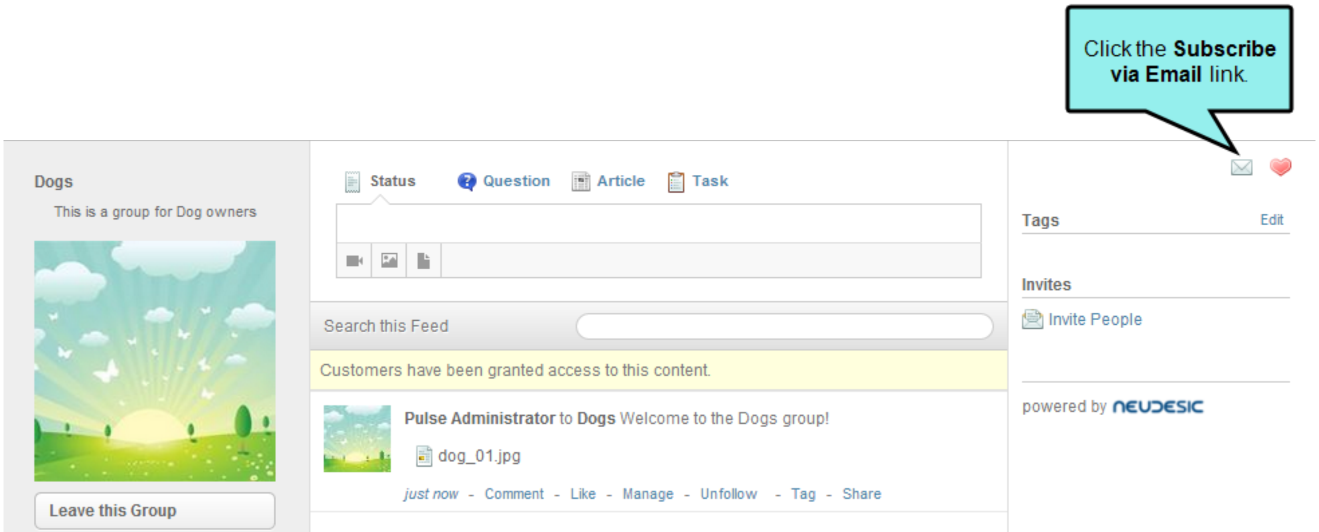
HOW TO VIEW GROUP MEMBERS AND TAGS

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



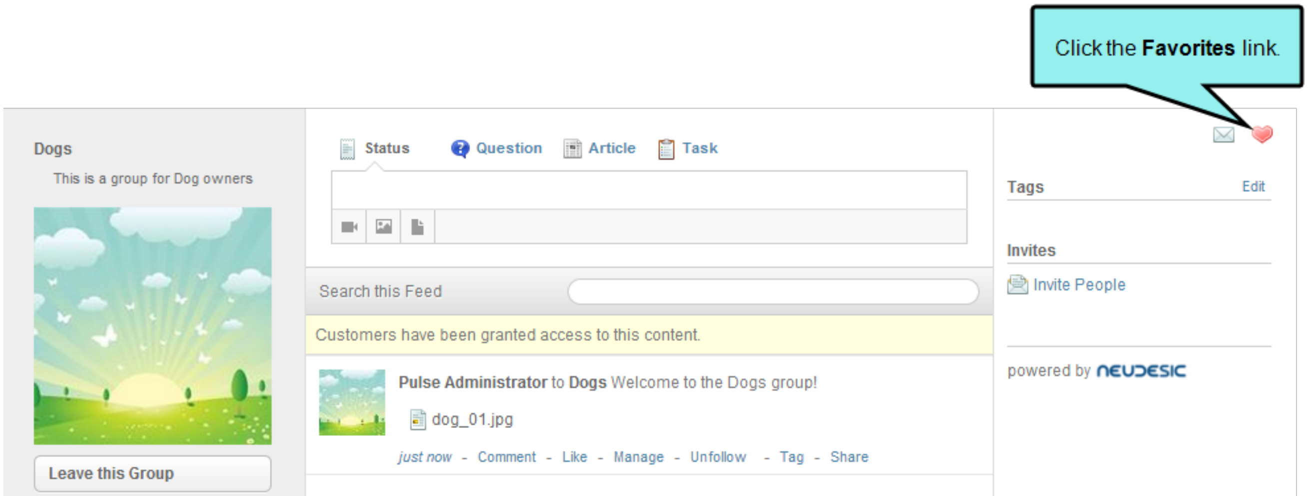
HOW TO SUBSCRIBE TO A GROUP FEED

To subscribe to a group feed to receive updates by email, click the envelope icon. If you have not already been added as a group member, you are added now.



HOW TO ADD THE GROUP FEED TO YOUR FAVORITES

To add a group to your list of Favorites, click the heart icon.



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

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

Creating Groups

Use the following steps to create groups.

HOW TO CREATE GROUPS

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

   ### HOW TO ENTER THE GROUP INFORMATION

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

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

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

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

   d. (Optional) Place a check mark in the **Moderation** box if you want all group posts to be approved by a moderator before being displayed.

   e. (Optional) Place a check mark in the **Visibility** box. The group will be visible to users who perform a search for the group. If the check box is left blank, users must be invited to join the group.

   The check box "Allow Users to Find This Group" doesn't affect audience permission in the privacy tab.
4. Click the **Privacy** tab. Then do the following:

   ### HOW TO ADD USERS AND GROUPS

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

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

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

d. Click **Add**.

HOW TO REMOVE A USER OR GROUP

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

HOW SET PERMISSIONS FOR GROUP MEMBERS

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

Option	Description
Owner	Gives the user or group full access permissions to the group. Owners can comment, post, add and remove content, adjust group settings, and add group members.
Moderator	Gives the user or group access permissions to moderate (approve/reject) posts and comments.
Contributor	Gives the user or group access permissions to post to the group.
Commenter	Gives the user or group access permission to comment on posts, but restricts the user from creating posts.
Viewer	Gives the user or group access permissions to view posts and comments, but restricts the user from any other type of group participation.

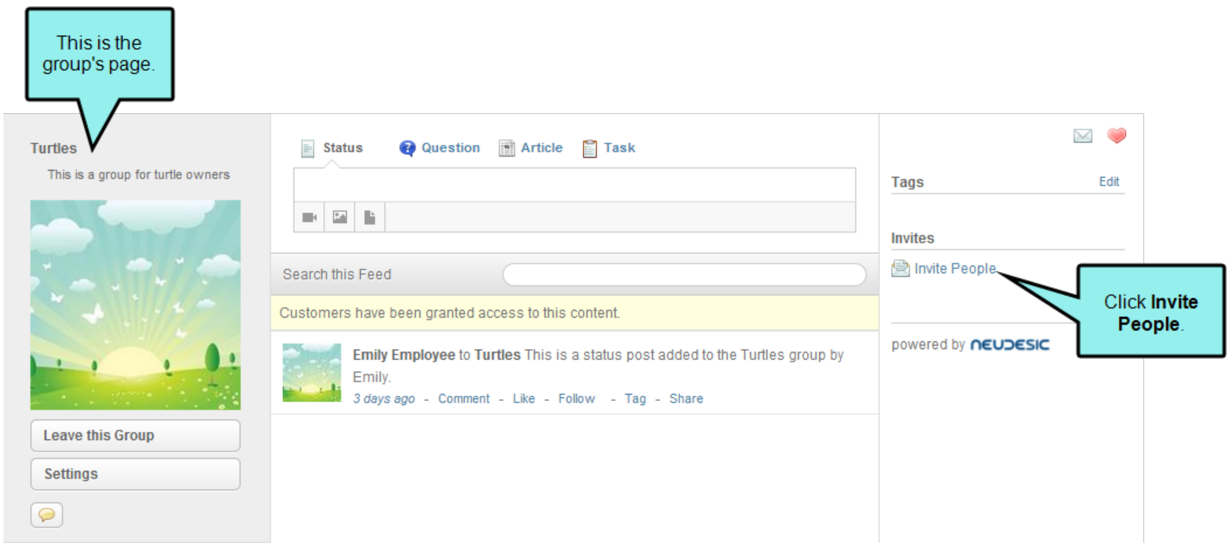
5. Click **Create this Group**

Moderating Groups

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

HOW TO INVITE PEOPLE TO A GROUP

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



   This opens the Invite People dialog.

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

      This sends an invite to the person you added.

HOW TO ADJUST THE GROUP SETTINGS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **Groups > Owned by Me**
3. In the Find Groups page, click the desired group to open its page.
4. In the group's page, click the **Settings** button.
5. In the My Group page, click the **Basic** tab and change the group information as needed:
   a. In the **Name** field, type a group name.
   b. In the **Description** field, type a short group description.
   c. In the **Audience** field, select the desired audience. These settings correspond to the membership group permissions.
      - **Employees** Members of the Employees group can be invited to and join groups.
      - **Employees and Customers** Members of both the Employees and Customers groups can be invited to and join groups.

   d. (Optional) Place a check mark in the **Moderation** box if you want all group posts to be approved by a moderator before being displayed.
   e. (Optional) Place a check mark in the **Visibility** box. The group will be visible to users who perform a search for the group. If the check box is left blank, users must be invited to join the group.
6. Click the **Privacy** tab.
7. In the Privacy tab, you can do the following:

   ### HOW TO ADD USERS AND GROUPS

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

HOW TO REMOVE A USER OR GROUP

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

HOW TO SET PERMISSIONS FOR GROUP MEMBERS

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

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

8. When finished, click Save

Joining Groups

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

HOW TO JOIN GROUPS

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

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

CHAPTER 5

Using the Tags Menu

AVAILABLE TO: Administrators and Employees

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

This chapter discusses the following:

Using Tags

While tags can be created and applied to posts by any registered user, members of the Employees and Administrators group also have the ability to create, follow, and delete tags in feeds.

EXAMPLE

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

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

GROUP PERMISSIONS AND TAGGING OPTIONS

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

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

Creating Tags

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

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

HOW DO YOU CREATE TAGS?

How you create tags depends on your group membership:

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

HOW TO CREATE TAGS IN THE PULSE DASHBOARD

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

   ### HOW TO CONFIGURE PRIVACY SETTINGS

   You have a variety of options when configuring privacy settings:

   - **Add Users and Groups** You can add users by clicking **Add a user or group**. This opens the Add a User or Group dialog. Do the following.
     - Enter the name of the user or group in the small field at the top of the dialog. Names that already exist in the Pulse database will appear in the large field below.
     - Click the check box next to the name of the user or group you want to add in the large field. You can then enter other names in top field and select different users or groups if you need to.
     - Click **Add**.
   - **Remove Users** You can remove users by clicking next to their names.
   - **Set Permissions for Users** Select the permission settings for each user. You can select the following options:
     - **Owner** Gives the user full access to the group. Owners can comment, post, add and remove content, adjust group settings, and add users to the group.
     - **Contributor** Lets lets the user create group posts.

- **Commenter** Lets the user comment on group posts, but restricts the user from posting content.
- **Viewer** Lets the user view the group, but they cannot interact with it in any other way.

5. At the bottom of the Create Tag page, click the **Create this Tag** button.

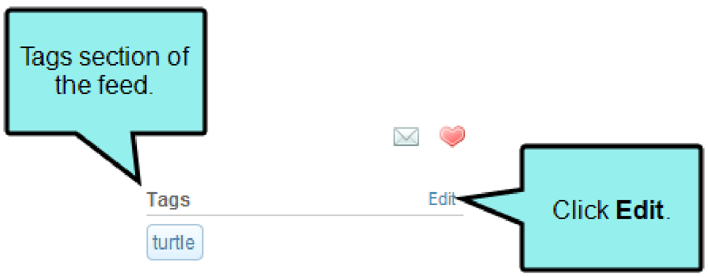
   This opens a page that gives you different options for editing tag settings.

HOW TO CREATE TAGS IN THE EMBEDDED DISCUSSION FORMS

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

HOW TO ADD TAGS FROM THE TAGS SECTION OF A FEED

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



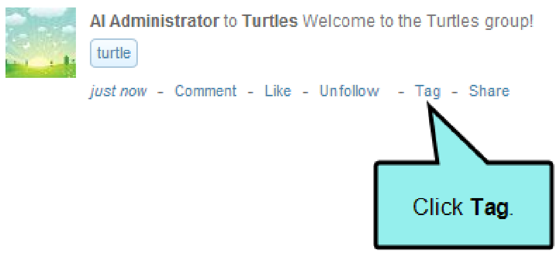
3. Enter a new tag and click **Update**.

HOW TO ADD TAGS TO A POST

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

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

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



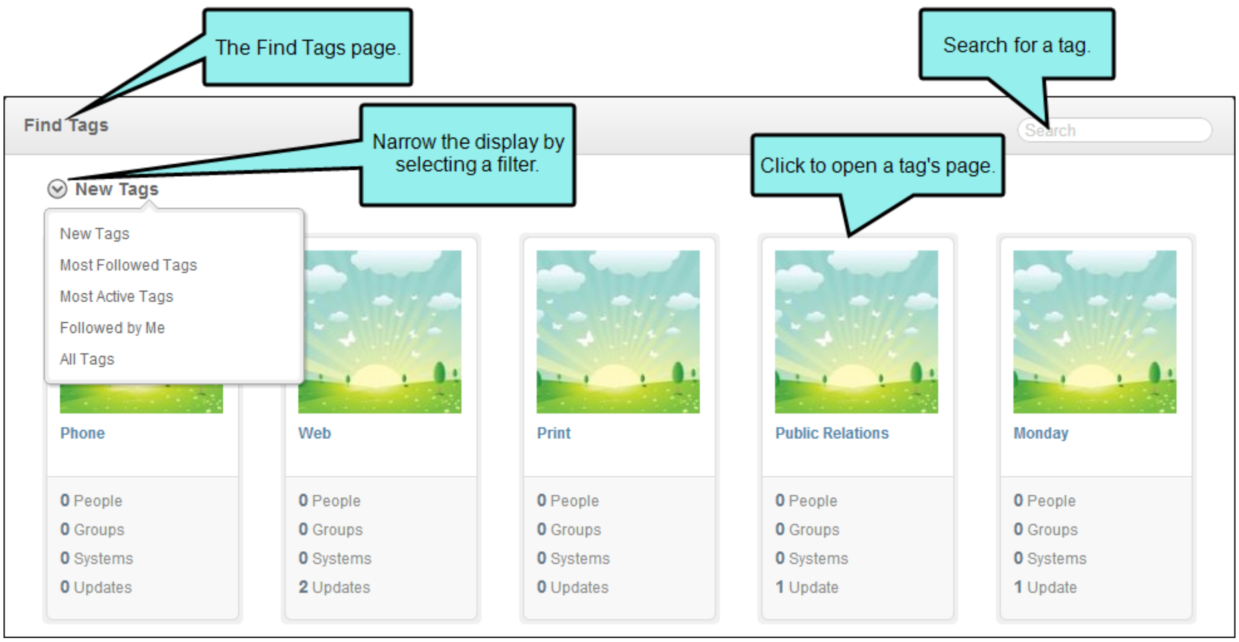
3. In the Edit Tag dialog, enter a new tag name in the field. If you want to add multiple tags, separate each tag with a comma.
4. Click **Update**. The tag is created and the post is tagged with the selected tag. Click **Update**.

Finding and Moderating Tags

Use the following steps to find and moderate tags.

HOW TO FIND AND MODERATE TAGS

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



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

HOW TO SEARCH FOR A TAG

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

HOW TO FILTER THE TAGS ON THE PAGE

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

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

HOW TO FOLLOW A TAG

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

HOW TO FOLLOW A TAG FROM THE DASHBOARD

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

HOW TO FOLLOW A TAG FROM A POST

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

HOW TO CHANGE THE TAG SETTINGS

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

HOW TO VIEW TAG INFORMATION

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

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

CHAPTER 6

Using the Systems Menu

AVAILABLE TO: **Administrators** and **Employees**

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

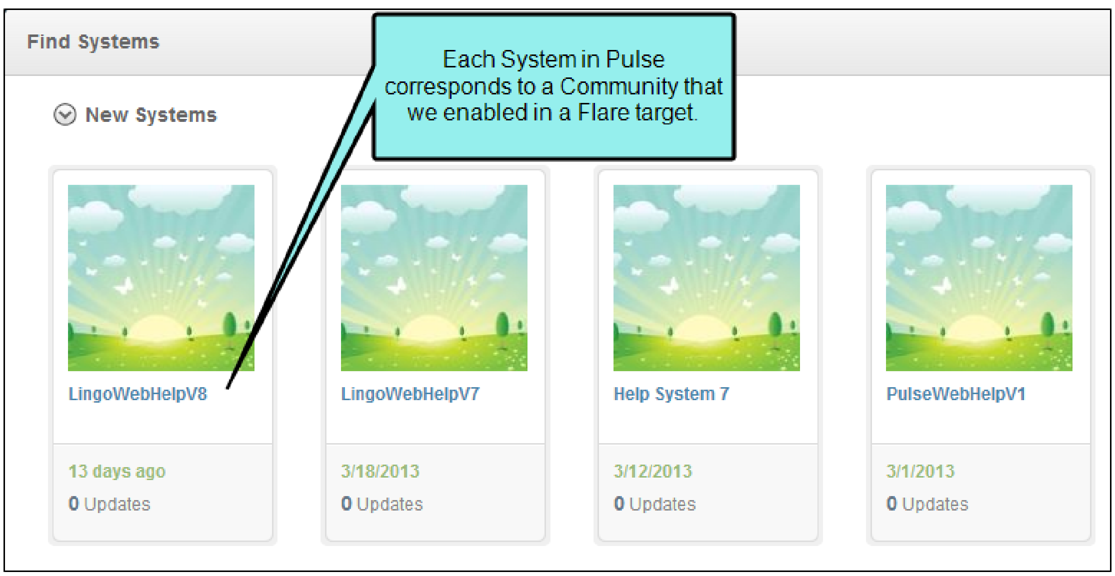
This chapter discusses the following:

Pulse Systems and Flare Communities

To integrate a Pulse system with the Flare output, you must first create a community in the Flare target. This action also creates a corresponding system in Pulse.

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

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



Creating Systems and Communities

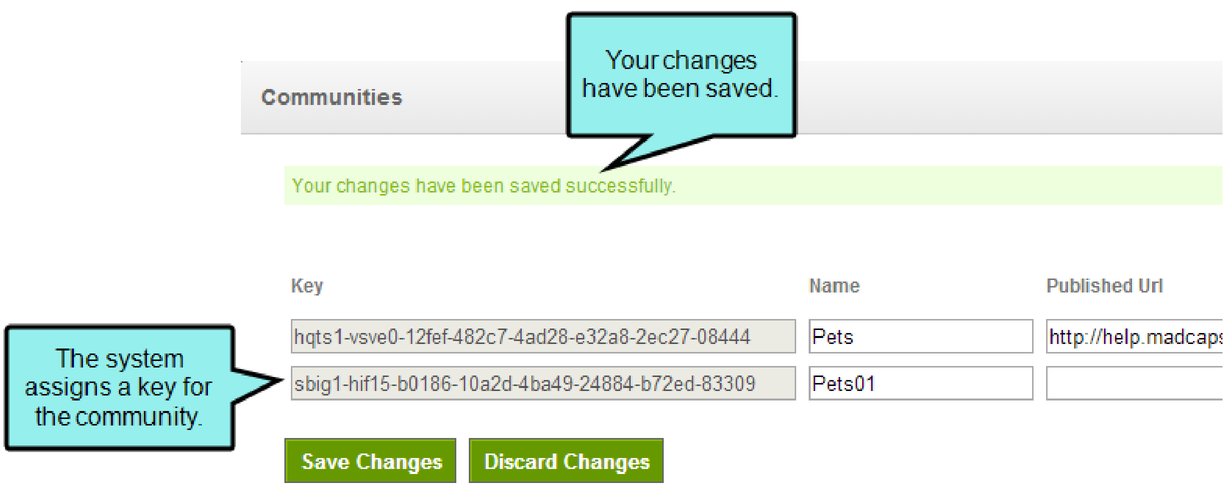
There are two ways to create a new system in Pulse to integrate with a Flare community. For the best experience, it is recommended that you always create communities using the Flare Target Editor:

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

HOW TO CREATE A SYSTEM USING THE PULSE DASHBOARD

> WARNING: If you create your new system using the Pulse dashboard, it will require several extra steps on your part. This is why we recommend creating Pulse systems from the Community tab of the Flare Target Editor.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Open the Create System page using one of these methods:Select **Systems > Create System**. Select **Systems > Find System**. Then click **Create System** at the bottom of the page.
3. Under the **Basic** tab, type the following for the system hub:**Name** The name of the system.**Description** A short description about the system.
4. Click **Create this System**. This opens the new system's page in thePulse dashboard.
5. Select **Administration > Settings**. The Settings page opens.
6. In the Settings page, click **Communities**.
7. In the Communities page, click **New**. Then type the name of the system in the **Name** box. Your entry must exactly match the system name you created earlier.
8. Click **Save Changes**. When prompted to confirm that you want to save all changes, click **OK**A key for your new Flare community appears in the Communities list and a message confirms that your changes have been saved successfully.



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

> NOTE: These instructions assume that you have already enabled the Pulse server and entered your community login information.

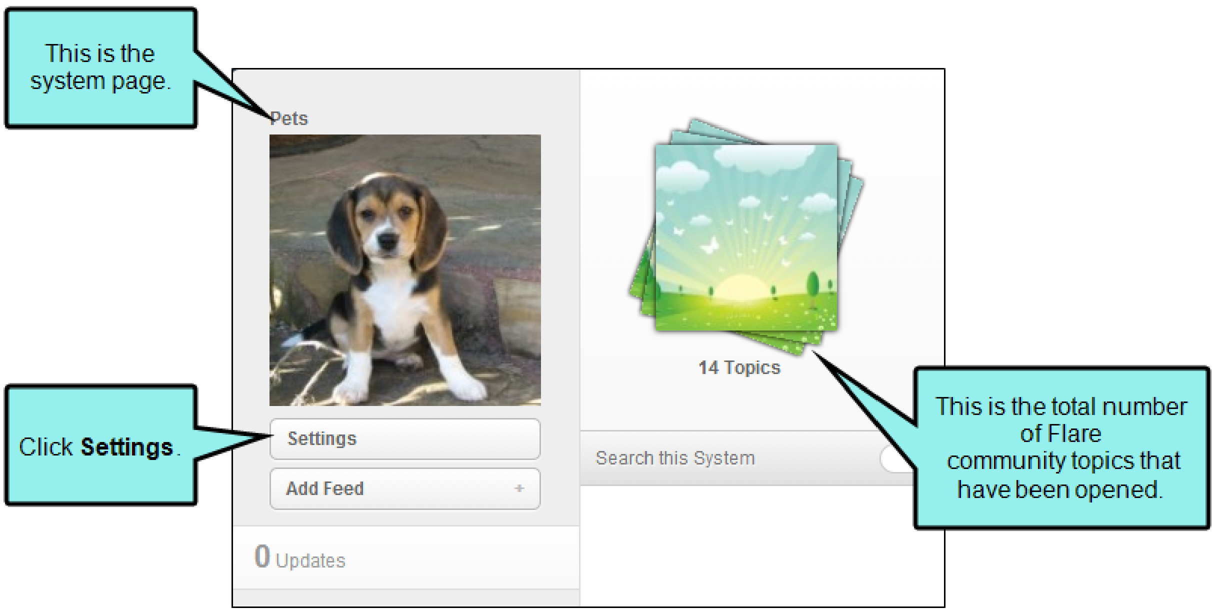
12. Under **Current Pulse Configuration**, click **Refresh**.
13. Under **Community**, click **Manage**. Note that your new Pulse system/Flare community is now listed in Flare.
14. Click **Remap Topics**.

Configuring Systems

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

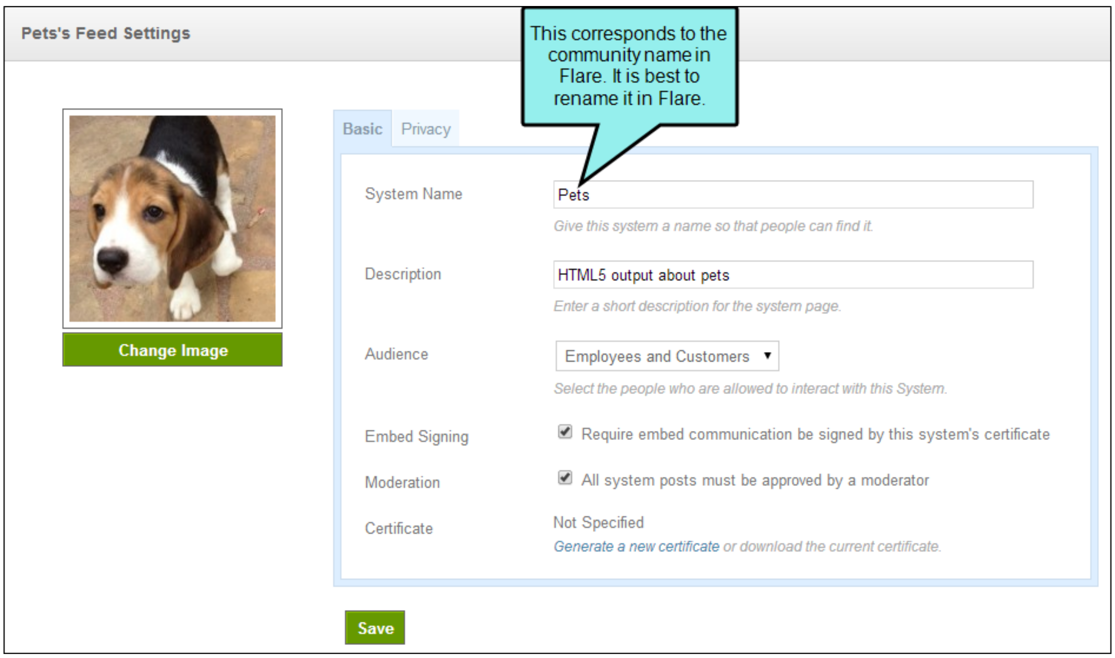
HOW TO CONFIGURE THE BASIC SETTINGS FOR A SYSTEM

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



3. In the system page, click **Settings**. The system's Feed Settings page opens.
4. In the **Basic** tab, define the general system settings. You have these options:
   - **Change Image** Click **Change Image** to upload an image file for your system. Adding an image is a helpful way to distinguish between multiple systems.
   - **System Name** Change the name of the system. For best results and to ensure that your Flare topics are properly mapped to the Pulse features, it is strongly recommended that you always change the Flare community name. This will automatically change the **System Name** in Pulse.
   - **Description** Update the system description. If this is a Flare-integrated system, we recommend noting it in the description.

- **Audience** Select the groups that are allowed to interact in the community. You can select Employees and Customers, or just Employees.
- **Embed Signing** If you have an embedded signing requirement for SSL, place a check mark in this box. This is the default setting. Remove the check mark to disable the option. To find out if your company has SSL requirements, see your Network Administrator.
- **Moderation** Select this option if you want new posts to always require approval by a moderator.
- **Certificate** If you require a certificate for SSL, click **Generate a new certificate**. This creates a certificate file that you can download in the Personal Information Exchange (PFX) file format. To find out if your company has SSL requirements, see your Network Administrator.



5. Click **Save**.

HOW TO CONFIGURE THE PRIVACY SETTINGS FOR A SYSTEM

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

HOW TO REMOVE USERS AND GROUP

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

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

HOW TO ADD A USER OR GROUP

a. In the **Privacy** tab, click **Add a user or group**.

b. In the Add a User or Group dialog, do the following:

   i. In the entry field, type the user or group name to add. This populates the list with matching items from the Pulse database.

   ii. Place a check mark in the box next to the desired user account or group name.

   iii. Repeat these steps until you have added all of the desired users and groups.

c. Click **Add**.

HOW TO SPECIFY USER AND GROUP PERMISSIONS

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

Option	Description
Owner	Provides full access to the system and its feeds. They can comment, post, add and remove content, adjust system settings, and add feeds.
Moderator	Provides users in the group with the ability to moderate (approve or reject) new posts in the community.
Contributor	Provides users and group members with the ability to post content to the system and its feeds.
Commenter	Provides users and groups members with the ability to comment on system post and its feeds. This setting does not allow individuals to post content themselves.
Viewer	Provides users and group members with read-only access to the system and its feeds.

6. Click **Save**.

Adding and Configuring System Feeds

You can add and configure system feeds in Pulse.

HOW TO ADD FEEDS TO A SYSTEM

> IMPORTANT: If you use the instructions below to add feeds for a Flare community, you must remap the topics in the Community tab of the Flare Target Editor.

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

HOW TO CONFIGURE A FEED

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

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

> IMPORTANT: If you use the instructions below to configure feeds for a Flare community, you must remap the topics in the Community tab of the Flare Target Editor.

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

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

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

Finding Systems

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

It is recommended that you rename communities within Flare, rather than within the dashboard. If you rename a community via the Pulse dashboard, it will not automatically update within the Flare target.

HOW TO FIND SYSTEMS

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

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

> IMPORTANT: It is recommended that you rename communities within Flare, rather than within the dashboard. If you rename a community via the Pulse dashboard, it will not automatically update within the Flare target.

CHAPTER 7

Using the Administration Menu

AVAILABLE TO: Administrators only

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

This chapter discusses the following:

Pulse Database

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

Viewing the Database Settings

Use the following steps to view database settings.

HOW TO VIEW THE DATABASE SETTINGS

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

> TIP: We recommend that you keep a record of these settings in case you experience an issue in the future.

Understanding the Database Settings

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

The table below details the settings in the Database page:

Because you create the database during the installation process, you will not use this feature.

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

General Settings

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

Viewing the General Settings

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

HOW TO VIEW THE GENERAL SETTINGS

Select **Administration > Settings**. The Settings page opens.

Click **General**. This opens the General Settings page.

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

> TIP: We recommend that you keep a record of these settings in case you experience an issue in the future.

Understanding the General Settings

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

Setting	Description	Typical Setting/Format	Additional Information
Site URL	This is the URL that users will enter in their web browser to gain access to Pulse. In order for email and other settings to work properly, you must type the exact URL.	http://application.domain.com	This setting is pre-populated for you during the installation process. The site URL is used when it is different from the URL used during the Pulse configuration. For example, the user may have configured to an IP address, but now the user is replacing that IP address with a host name. It is important to ensure that the Site URL exactly matches the DNS entry for your Pulse server. The Site URL is also included in outbound email notifications.
Restricted Word List	Click **Show** to reveal an entry field where you can type any words you would like to restrict from use in end user posts.	blank	Typically, this is left blank. Your environment may have a different requirement. If you choose to create a word list, always use comma-separated text. EXAMPLE `curse,darn`

Setting	Description	Typical Setting/Format	Additional Information
Customer Groups	Place a checkmark in this box to allow external users. This allows the Administrator to disable the embedded discussion forum for any users who have not been granted Administrator or Employee privileges. See "Managing Users" on page 93.	checkmark=enabled	Typically, this is selected. Your environment may have a different requirement. A checkmark grants external users (i.e., Customers) access to Pulse. Remove the checkmark to revoke access.
Group Sync	Place a checkmark in this box to enable group sync.	checkmark=enabled	
SMTP Host	This is the hostname or IP address of the SMTP relay that accepts incoming requests which is the host that will send outbound emails for Pulse.	exchange01 or smtp.example.com	Obtain this information from your company's Email Administrator.
SMTP Port	This is the port number of the SMTP server handing outbound emails.	25	Typically, the port number is 25. Your environment may have a different requirement.
SMTP SSL	Place a checkmark in the box to enable Secure Sockets Layer (SSL).	checkmark=enabled blank=disabled	Typically, this feature is disabled. Your environment may have a different requirement.
SMTP Username	Type the user name of a valid account on the SMTP relay.	pulse@example.com	Obtain this information from your company's Email Administrator.
SMTP Password	Type the password for the valid account on the SMTP relay.	<password>	Obtain this information from your company's Email Administrator.

Setting	Description	Typical Setting/Format	Additional Information
Incoming Mail Server Type	Select the type of incoming email server to use.	POP3 Exchange Web Services Poll the Local SMTP Drop Folder	Obtain this information from your company's Email Administrator.
Incoming Bad Mail Folder	Enter the path of the local server folder to hold raw incoming messages that have failed processing.		
POP3 Host	Enter the name or IP address of the POP3 host.	`pop3.gmail.com`	
POP3 Username	Enter the POP3 username.		
POP3 Password	Enter the POP3 password.		
POP3 Poll Task Frequency in Minutes	Enter the POP3 poll task frequency in minutes. This determines how often incoming mail is pulled.	0=off 1=1 minute	1 is the recommended setting.
POP3 Enable SSL	Place a checkmark in the box to enable Secure Sockets Layer (SSL).	checkmark=enabled blank=disabled	Use of this feature depends on company policy. We recommend leaving it unchecked.

Setting	Description	Typical Setting/Format	Additional Information
Notification Email Type	Set this to a single email address that does not change.	Static	Typically, this will be static. Your environment may have a different requirement. Pulse supports three types of email notifications: static, domain, and plussing. ■ Static For a single email address that doesn't change, and no support for posting to a group via email. ■ Domain If you have a whole domain you'd like Pulse to control. ■ Plussing If you have one email address you'd like Pulse to manage but would like to be able to post to groups via email.
Notification Email Address	Type a single email address from which notifications and registration emails are sent.	`accountname@example.com`	Typically, it is PulseRegistration@example.com (where example = your domain name). Your environment may have a different requirement.
Notification Email Display Name	The name that you want to appear as the sender in email notifications sent by Pulse.	Pulse Notifications	This defines the name that you want to appear in messages from the Notification Email Address.

Setting	Description	Typical Setting/Format	Additional Information
Activity Purge Task Frequency in Days	The frequency at which Pulse will run message archive task. When messages reach the age defined in the Message Archive Task Max Message Age in Day field, Pulse archives the messages and they will not display any longer in the user's task pane. 0=off, 1=1 day, 2=2days, etc.	0 (off)	Typically, this feature is disabled. Your environment may have a different requirement.
Activity Purge Task Max Message Age in Days	The maximum age a message can be until it is archived. After the established days, all messages will be archived and will not display any longer in the user's messages pane.	180	Typically, this is set to 180. Your environment may have a different requirement.
Account Sync Period	The number of minutes the authentication providers will sync with Pulse.	0	Typically, this is set to 0. Your environment may have a different requirement.
Always Use SSL	Place a checkmark in this box to redirect calls for http:// to https://.	checkmark=enabled blank=disabled	Typically, this feature is disabled. Your environment may have a different requirement.
Windows Auto Login IP Ranges	Define the range of IP addresses that will be permitted to automatically login to Pulse using windows credentials. If a user attempts to login from an IP address outside of the defined range, Pulse will prompt for credentials.	0.0.0.0-10.10.10.10 (or the IP range for your environment)	Typically, this field is left blank. Your environment may have a different requirement.

Setting	Description	Typical Setting/Format	Additional Information
Mobile Client Persistent Login	Place a checkmark in this box to enable mobile client persistent login.	checkmark=enabled blank=disabled	When this feature is enabled Pulse mobile clients will remember user login information. If this feature is disabled, users will be required re-login after 60 minutes of inactivity.
Video Encoding	Place a checkmark in this box if you have setup an encoding server. When this feature is enabled Pulse can support additional video formats (.mov, .3gp, .wmv, .avi) in addition to MP4. Requires a licensed copy of Microsoft Expression Encoder or Handbrake.	checkmark=enabled blank=disabled	Typically, this feature is disabled. Your environment may have a different requirement.
Log Retention	Specify the number of days to retain the error message log on the server.	30	The default value is 30. Your environment may have a different requirement.
Content Purging	Place a checkmark in this box to enable content purging.	checkmark=enabled blank=disabled	When content purging is enabled, any content that is marked as deleted will be permanently deleted from the database.
Direct Messaging	Select where direct messaging should be enabled in Pulse.	Off Users and Groups Users Only	
Files	Select where files should be enabled in Pulse.	Off Users and Groups Users Only	

Incoming Mail Server Type Settings

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

POP3 MAIL SERVER SETTINGS

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

Setting	Description	Typical Setting/Format	Additional Information

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

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

EXCHANGE WEB SERVICES

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

Setting	Description	Typical Setting/Format	Additional Information
EWS URL	Type the URL for your Exchange Web Services end-point.	https://mail.mycompany.com/ews/exchange.asmx mail.us.example.com mail.emea.example.com	Obtain this information from your Email Administrator or EWS Provider.
EWS Domain	Type the domain name for your Exchange Web Server.	CORP	
EWS Username	Type the username of a valid account. For example, enter the username of an account that has an Exchange inbox. This account should not be a real user's account. Additionally, the account name is usually how your name appears in emails sent from this email configuration.	accountname@example.com PulseRegistration@example.com	
EWS Password	Type the password for the account.	<password> p@ssword1	
EWS Poll Task	This defines how frequently incoming mail is pulled by the server.	1	This is set to 0 by default. It is recommended that you set the value to 1.

POLL THE LOCAL SMTP DROP FOLDER

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

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

Configuring the Auto Login for Internal Windows Users

Click **General**.

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

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

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

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

HOW TO CONFIGURE THE AUTO LOGIN FOR INTERNAL WINDOWS USERS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. Click **General**. This opens the General page. In the **Windows Auto Login IP Ranges** box, enter one of the following:**An IP Address Range** For example, type: `10.0.0.0-10.255.255.255`. This permits all IP addresses within that range to log on automatically. **Multiple IP Address Ranges** If you have multiple ranges, separate each range with a comma. For example, `0.0.0.0-10.10.10.10,192.168.0.0-255.255.255.255`.
4. Click **Save**.

Managing Groups

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

IMPORTANT: The Groups menu in the dashboard deals with groups that are different from those accessed from the Administration menu.

Group Types

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

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

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

EXAMPLE

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

Group Access Permissions

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

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

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

Adding and Managing Groups

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

HOW TO ADD A GROUP

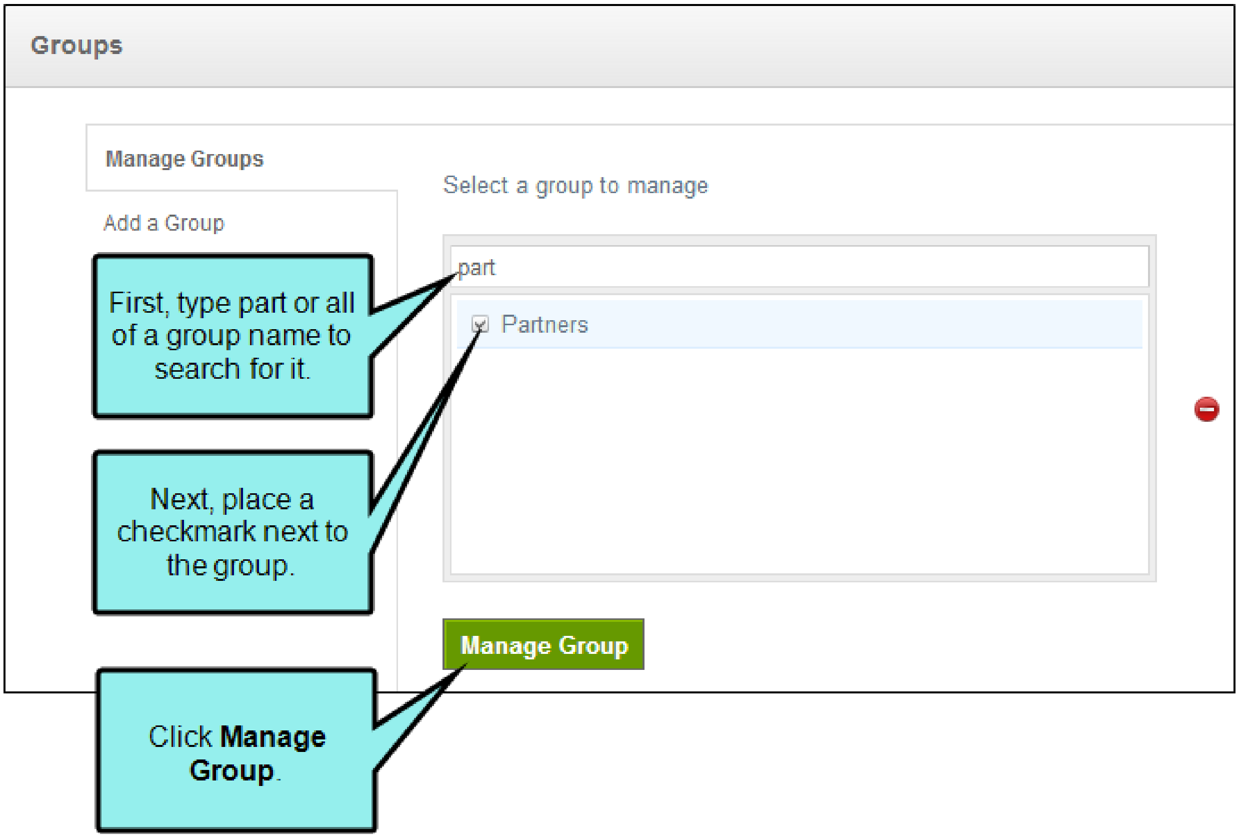
1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Groups**.

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

HOW TO SELECT A GROUP TO MANAGE

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Groups**.The Groups page opens. By default, the Manage Groups tab is active in this page.
4. Below the Manage Users tab, click **Manage Groups**.
5. In the **Select a group to manage** box, type part or all of a group name. Then press **Enter**. For example, type `part`.

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



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

HOW TO UPDATE BASIC GROUP SETTINGS

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

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

HOW TO UPDATE GROUP MEMBERSHIP

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

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

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

> NOTE: If a registered user is not a member of any group, the system provides that user with the same permissions as members of the Customers group.

3. Click **Save**.

HOW TO UPDATE THE ADVANCED GROUP SETTINGS

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

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

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

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

4. Click **Save**.

HOW TO DELETE A GROUP

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

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

   The Confirm Delete Group dialog opens.

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

Suggested Feeds

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

Adding a Suggested Feed

Use the following steps to add a suggested feed.

HOW TO ADD A SUGGESTED FEED

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

The next step is to configure the suggested feed.

Configuring a Suggested Feed

Use the following steps to configure a suggested feed.

HOW TO CONFIGURE A SUGGESTED FEED

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

Removing a Suggested Feed

Use the following steps to remove a suggested feed.

HOW TO REMOVE A SUGGESTED FEED

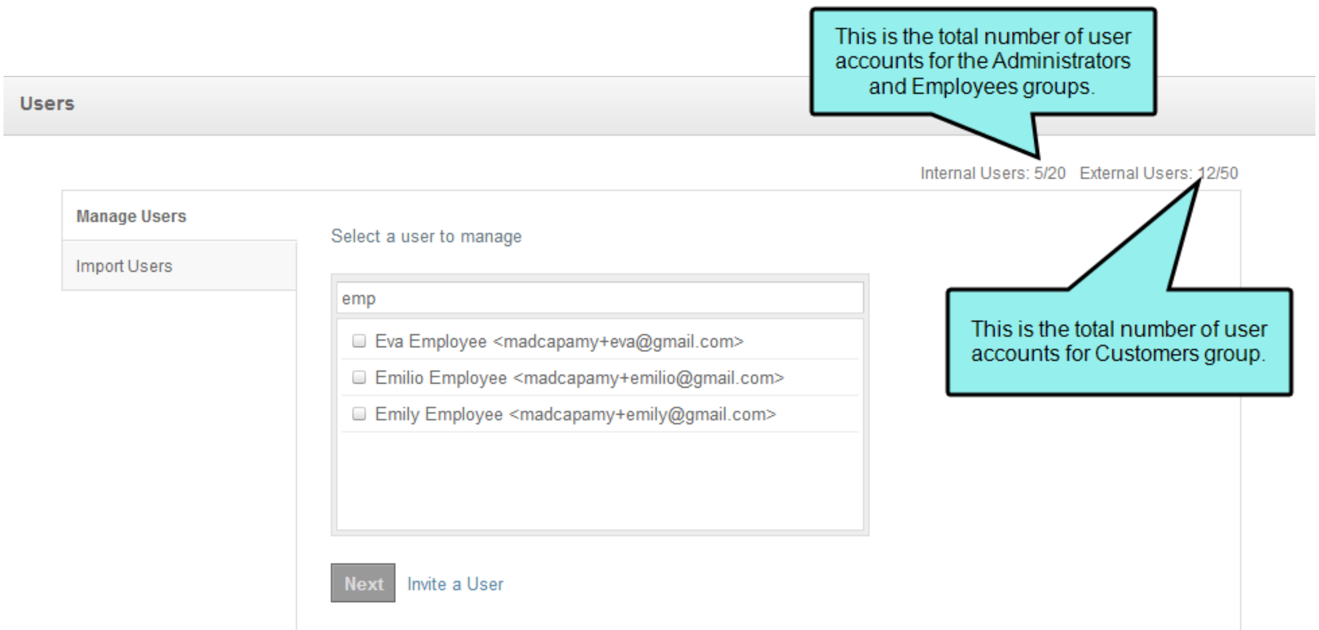
1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select Administration > Settings. The Settings page opens.
3. In the Settings page, click Suggested Feeds.
4. In the Select a Suggestions List to Manage box, place a check mark next to the desired list.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

Managing Users

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

Types of Users

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



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

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

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

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

In addition to the default groups above, Administrators can create more groups.

Creating an Administrator Account

Although a default administrator account named "PulseAdmin" is created during the initial server configuration, it is strongly recommended that you create a "standard" user account and assign it administrative permissions for day-to-day administrative operations.

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

HOW TO CREATE AN ADMINISTRATOR ACCOUNT

1. Log in to the Pulse dashboard using the default PulseAdmin account. See "Introduction" on page 6.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is selected.
4. In the **Manage Users** tab, click **Invite a User**. This opens the Invite User page.
5. Type the following information in these fields.
   - **First Name** The first name of the user.
   - **Last Name** The last name of the user.
   - **Email Address** A valid email address for the user.
   - **Title** A title for the user, such as a professional or job title.
   - **Department** A department name for the user, such as Engineering or Sales.
   - **Location** A location for the user, such as La Jolla or New York City.
   - **Phone** A telephone number for the user.
   - **Cell** A mobile phone number for the user.
   - **Skills & Expertise** Click **Edit Skills** if you want to associate yourself with any skills added by the Administrator. You can request new skills to be added by clicking **I don't see my skill**.

- **Experience** Click **Add Experience** if you want to add any relevant experience, including your company name, title, time period, and a description.
- **Education** Click **Add Education** if you want to add any relevant educational background, including your school name, dates attended, field of study, and a description.
- **Certification** Click **Add Certification** if you want to add any relevant certifications, including your certificate name, year, and a description.

6. In the **Group** area, place a check mark in the **Administrators** box.
7. When you are satisfied with the invitation, click **Send Invite**.
8. In the User Invite dialog, click **Ok** to close the message confirming that the invitation was sent.

When the email message arrives, follow the instructions to log in to Pulse.

Inviting New Users to Pulse

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

MINIMUM USER ACCOUNT REQUIREMENTS

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

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

HOW TO INVITE A SINGLE USER

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select Administration > Settings. The Settings page opens.
3. In the Settings page, click Users. The Users page opens. By default, the Manage Users tab is selected.
4. In the Manage Users tab, click Invite a User. This opens the Invite User page.
5. Complete the fields on the page.
6. In the Group area, place a check mark in the appropriate group name box(es) to add the user to one or more groups. You must select at least one group to send an invite.When users belong to more than one group, they are granted the combined access for all the groups to which they belong.
7. When you are satisfied with the invitation, click Send Invite.
8. In the User Invite dialog, click Ok to close the message confirming that the invitation was sent.

HOW TO BULK INVITE USERS

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

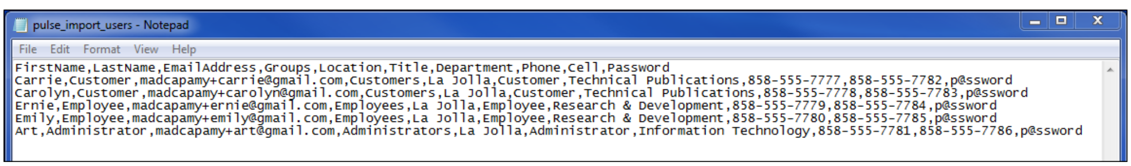
CSV FILE REQUIREMENTS

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

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

EXAMPLE

Below is an example of a properly formatted CSV file:


pulse_import_users - Notepad

File Edit Format View Help

```
FirstName,LastName,EmailAddress,Groups,Location,Title,Department,Phone,Cell,Password
Carrie,Customer,madcapamy+carrie@gmail.com,Customers,La Jolla,Customer,Technical Publications,858-555-7777,858-555-7782,p@ssword
Carolyn,Customer,madcapamy+carolyn@gmail.com,Customers,La Jolla,Customer,Technical Publications,858-555-7778,858-555-7783,p@ssword
Ernie,Employee,madcapamy+ernie@gmail.com,Employees,La Jolla,Employee,Research & Development,858-555-7779,858-555-7784,p@ssword
Emily,Employee,madcapamy+emily@gmail.com,Employees,La Jolla,Employee,Research & Development,858-555-7780,858-555-7785,p@ssword
Art,Administrator,madcapamy+art@gmail.com,Administrators,La Jolla,Administrator,Information Technology,858-555-7781,858-555-7786,p@ssword
```

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

Column Name	Format	Required Column	Description
FirstName	text ☆ EXAMPLE Enter the first name of the user: `Emily`	✔	The first name of the user.
LastName	text ☆ EXAMPLE Enter the last name of the user: `Smith`	✔	The last name of the user.

Column Name	Format	Required Column	Description
EmailAddress	email address EXAMPLE Enter a valid email address: `emily@example.-com` A valid email address includes the account (emily), the ampersand (@) and the domain (example.com).	✔	A valid email address. IMPORTANT: The email address is the unique identifier for the account. The email address cannot be changed once an account is created.

<table>
<tr><th>Column Name</th><th>Format</th><th>Required Column</th><th>Description</th></tr>
<tr><td>Groups</td><td>text

☆ EXAMPLE

To add the user to a single group, enter the group name. For example:

<code>Customers</code>

To add the user to multiple groups, enter the group names and separate them with the semicolon. For example:

<code>Administrators;Employees</code></td><td>✔</td><td>This in the group name (or names) in Pulse.

To add a user to multiple groups, separate the group names using a semicolon (;).</td></tr>
<tr><td>Location</td><td>text</td><td>✖</td><td>This can be used to specify the user location. This might be a facility, city, town, state, or region.</td></tr>
<tr><td>Title</td><td>text</td><td>✖</td><td>This is the user's professional title.</td></tr>
<tr><td>Department</td><td>text</td><td>✖</td><td>This is the user's department.</td></tr>
<tr><td>Phone</td><td>telephone number</td><td>✖</td><td>This is the account holder's telephone number. Always use a dash (-) to separate the area code, prefix, and line number. For example, 000-000-0000.</td></tr>
</table>

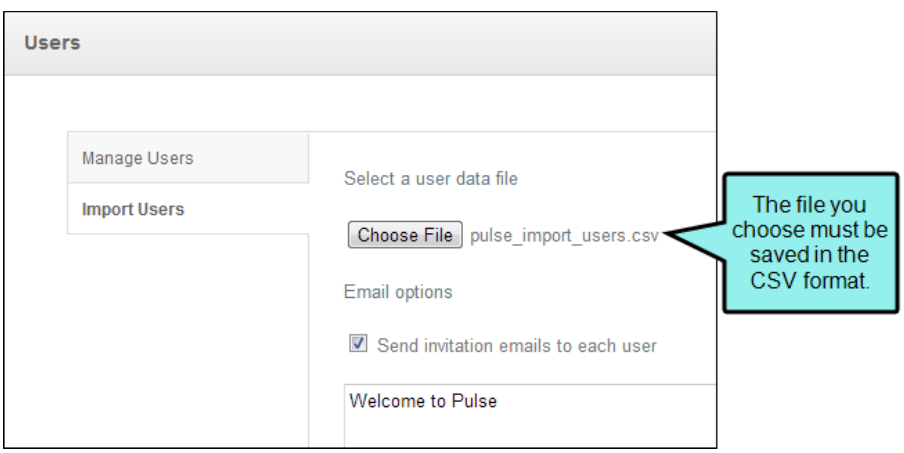
Column Name	Format	Required Column	Description
Cell	telephone number	✖	This is the users mobile number. Always use a dash (-) to separate the area code, prefix, and line number. For example, 000-000-0000.
Password	text	✖	This is the password for the user account. It must be a minimum of 7 characters in length.

HOW TO IMPORT USERS FROM CSV

Follow these steps to import users into Pulse.

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

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is selected.
4. Click the **Import Users** tab.
5. Under Select a User Data File, click the **Choose File** button. The file that you using for the import must be saved in the CSV file format. The data in the file must also meet the requirement defined above.
6. In the Open dialog for Windows, find the file that you want to open. Then, double-click the file or highlight it and click **Open**.



7. Under **Email Options**, place a checkmark in the **Send invitation emails to each user** box.
8. Type a message in the text box. The system includes the message "Welcome to Pulse" by default.

9. Click **Import**.If the import is not successful, an error message appears. Most failed import attempts are due to a format error in your data file. Be sure to review the requirements for CSV files above. Then, try the import again.
10. Click **Back** to return to the Import users page. Until your users log in to Pulse for the first time, you will not be able to find them in the Manage Users list.

HOW TO RESEND AN INVITE

Administrators can resend invitations to users that have not yet registered for Pulse.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is selected.
4. In the **Manage Users** tab, select the user to manage by following these steps:Type part of all of the user name.In the selection list, place a checkmark in the box next to the desired user-name.
5. Click **Next**.
6. In the User Details page, click **Resend Invite**..

   > NOTE: This option is only available if the user has not yet activated their Pulse account.

7. In the User Invite dialog, click **Ok** to close the message confirming that the invitation was sent.

The user can click the link in the invitation to log into Pulse for the first time.

Deleting/Disabling Use Accounts

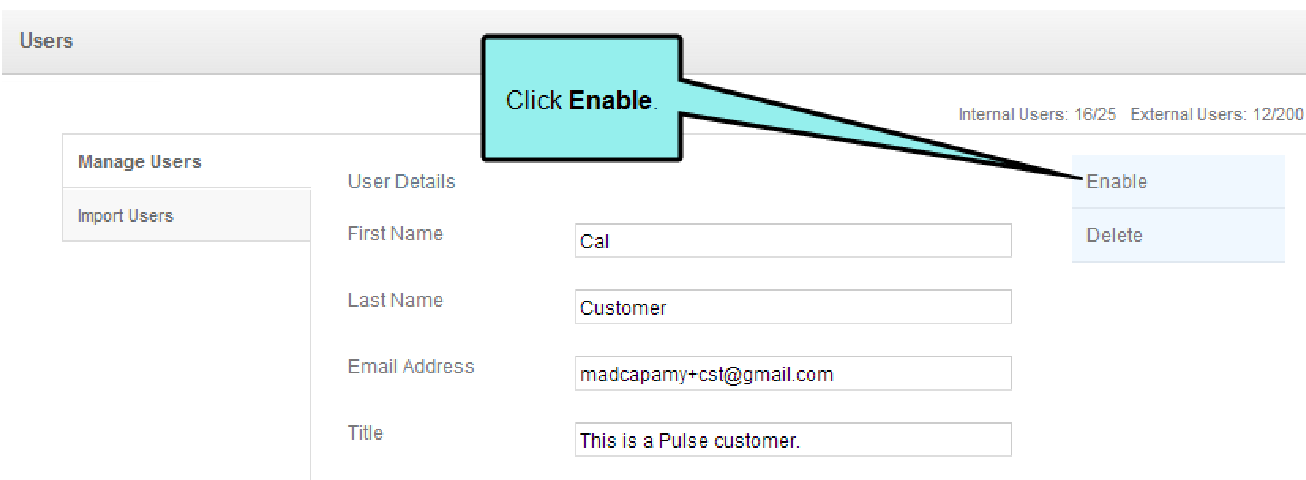
You can disable, enable, and delete user accounts.

HOW TO DISABLE A USER ACCOUNT

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is selected.
4. In the **Manage Users** tab, select the user to manage by following these steps:Type part of all of the user name.In the selection list, place a checkmark in the box next to the desired user-name.
5. Click **Next**..
6. In the User Details page, click **Disable**.
7. In the Confirm Disable dialog, click **Disable**.

HOW TO ENABLE A DISABLED ACCOUNT

To enable a disabled account use the same steps as above. Click **Enable** in the User Details page.



HOW TO DELETE A USER ACCOUNT

Members of the Administrators group have permissions to delete users in Pulse. After deleting a user, the user will no longer be able to sign in to Pulse.

In the User Details page, click **Delete**.

In the Confirm Delete User dialog, click **Delete**. The user will no longer be able to log in to Pulse.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Users**. The Users page opens. By default, the Manage Users tab is selected.
4. Click the **Manage Users** tab.
5. Select the user to manage:Type part or all of the user name. For example, type `cal`.In the selection list, place a checkmark in the box next to the desired username. For example, select `Cal Customer`.
6. Click **Next**.
7. In the User Details page, click **Delete**.
8. In the Confirm Delete User dialog, click **Delete**. The user will no longer be able to log in to Pulse.

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

Configuring Profile Settings

Administrators can adjust profile settings, including which fields and elements are available and editable for users.

Pulse users can self-declare any of the skills you input. A great place to start your skills list is LinkedIn and other industry-specific websites. Each skill can be assigned to a skill category. Therefore, you may want to create a skill category first. Skill categories are used in Pulse to make locating and grouping skills easy. Some good skill categories are things like Human Resources, Legal, or Information Technology. Think about people's job roles and departments for ideas on skill categories.

In the Settings page, click **Profiles**. The Profiles page opens.

HOW TO CONFIGURE PROFILE SETTINGS

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Profiles**. The Profiles page opens.
4. You can do any of the following:

   ### SKILL CATEGORIES—ADD, EDIT, REMOVE

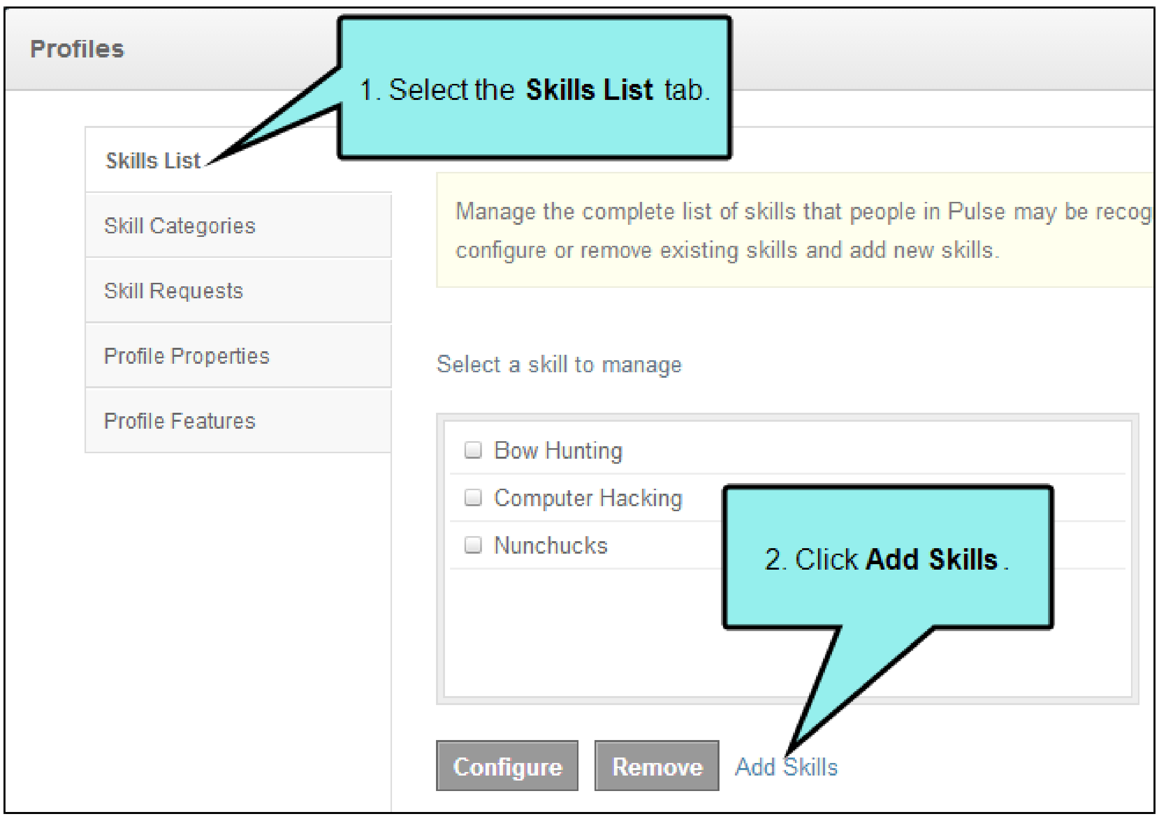
   1. Select the **Skill Categories** tab.
   2. To add a new skill category, do the following:
      a. Click **Add Skill Category**.
      b. In the dialog that opens, enter a skill name and click **Save**.
   3. To edit an existing skill category, do the following:
      a. In the main list on the Skill Categories tab, select the skill category you want to edit.
      b. Click **Configure**.
      c. Change the name.
      d. Click **Save**.
   4. To remove an existing skill category, do the following:
      a. In the main list on the Skill Categories tab, select the skill category you want to remove.

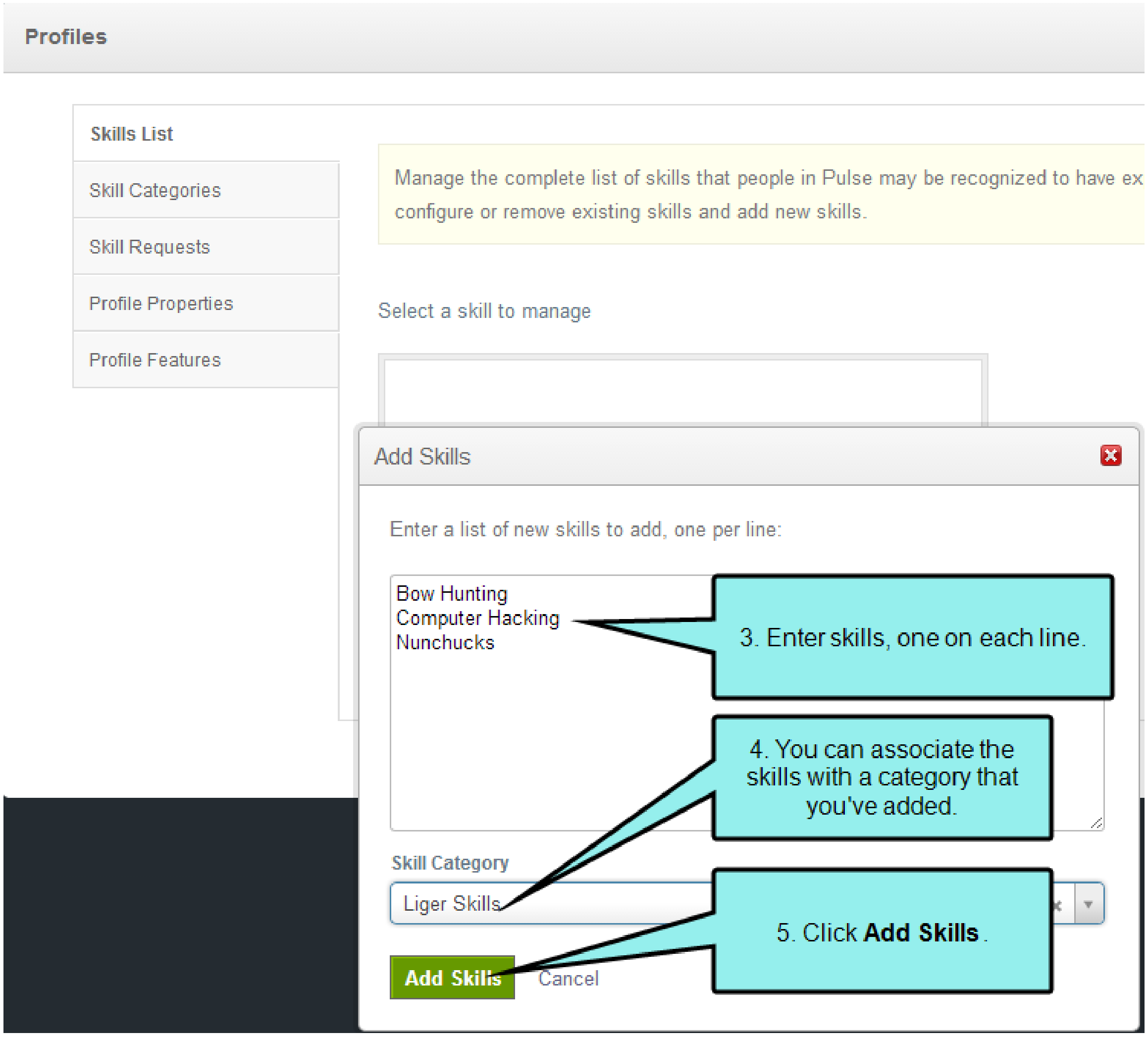
b. Click **Remove**.

c. Click **Delete Skill Category**.

SKILLS—ADD, EDIT, REMOVE

1. Select the **Skills List** tab.
2. To add new skills, do the following:
   a. Click **Add Skills**.
   b. In the dialog that opens, enter skills in the text box, one on each line.
   c. You can also associate the skills with a category (if you have created one).
   d. Click **Add Skills**.





3. To edit an existing skill, do the following:
   a. In the main list on the Skills List tab, select the skill you want to edit.
   b. Click **Configure**.
   c. Change the name and or skill category associated with the skill.
   d. Click **Save**.

4. To remove an existing skill, do the following:
   a. In the main list on the Skills List tab, select the skill you want to remove.
   b. Click **Remove**.
   c. Click **Delete Skill**.

SKILL REQUESTS—APPROVE OR REJECT

1. Select the **Skill Requests** tab. Any requests from users are listed on the tab.
2. To approve a request, do the following:
   a. Click **Approve**.
   b. In the dialog that opens, you can associate the skill with a category (if you have created one).
   c. Click **Approve Skill**.
3. To reject a request, do the following:
   a. Click **Reject**.
   b. In the dialog that opens, you can type a reason for the rejection.
   c. Click **Reject Skill**.

PROFILE PROPERTIES (FIELDS)—ADD, EDIT, REMOVE

These are the fields that users see and complete when registering in Pulse (e.g., First Name, Location, Phone).

1. Select the **Profile Properties** tab.
2. To add a new property, do the following:
   a. Click **Add Property**.
   b. In the **Name** field, enter a name for the new field.
   c. In the **Type** field, enter a kind of field to be used for the new property.
   d. Depending on the type you selected, complete the fields that are shown. This can include a text box (if you need to provide a custom type), as well as check boxes to make the new property editable, make it searchable, or include predefined values.

If you select Predefined Values, enter them (one per line) in the field that displays.

   e. Click **Save**.

3. To edit an existing property, do the following:
   a. In the main list on the Profile Properties tab, select the property you want to edit.
   b. If you want to reposition it in the order, click either **Move Up** or **Move Down**.
   c. Click **Configure**.
   d. You can change the name or type for the property. You can also use the fields below to make the property editable, make it searchable, or include predefined values.
   e. Click **Save**.
4. To remove an existing property, do the following:
   a. In the main list on the Profile Properties tab, select the property you want to remove.
   b. Click **Remove**.
   c. Click **Delete Profile Property**.

PROFILE FEATURES (EXPERIENCE, EDUCATION, CERTIFICATIONS)—ENABLE OR DISABLE

1. Select the **Profile Features** tab.
2. Click a check box next to **Experience**, **Education**, or **Certifications** if you want to enable that feature. If you want to disable the feature, remove the check mark.
3. Click **Save**.

Configuring Moderation—Rejection Reasons

As an Administrator, you can configure your moderation settings by adding reasons for rejecting posts. Then when you reject a post, you can select any of the reasons you've added.

HOW TO ADD A REJECTION REASON

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Moderation**. The Moderation page opens.
4. At the bottom of the page, click **Add Rejection Reason**.
5. In the **Reason** field, enter the text that you want.
6. Click **Save**. The text is added to the list of reasons.

> NOTE: You can edit a reject reason by selecting it from the list and clicking **Configure**. You can delete a rejection reason by clicking **Remove**.

Event Log

In the Pulse dashboard, the Administration > Settings menu command is available to members of the Administrators group. This gives administrators the ability to access the **Log** feature when you want to view and research events in the Pulse log.

Pulse Event Logs

The Pulse log shows the following events and information:

Field	Description
EventType	The type of event. For example, critical, error, or warning.
CreatedUTC	The date and time steps the event occurred.
MachineName	They Pulse web server name.
Url	Click to open a URL with more information.
ProcessName	Shows the name of the process.
ExceptionType	Lists events that required special processing.

Viewing Event Logs

Use the following steps to view the event log.

HOW TO VIEW THE EVENT LOG

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In Settings page, click **Log**. The Pulse event log opens.
4. From the drop-down list, select one of these filters:
   - **Show All** Select this item to reveal all logged events.
   - **Critical** Select this item to reveal a list of critical events that have occurred. Critical errors can lead to system disruption/failure, so it is important to take corrective actions.

- **Error** Select this item to reveal a list of events that can potentially lead to system disruption/failures, so it is import to locate errors and determine if preventative or corrective action is needed.
- **Warning** Select this item to view a list of events that are not significant, but may indicate of a future issue.
- **Information** Select this item to show events that completed successfully.
- **Verbose** Select this item to reveal more detailed information about the issue. This is a helpful option to look at should you need to perform troubleshooting.

5. (Optional) If you want to search the log, enter your search terms in the **Query** field. Then click **Search**.
6. (Optional) If you want to clear the Query field of any search terms, click **Reset**.

Managing Communities

AVAILABLE TO: **Administrators** only

A community is a collection of registered users that have access to a set of social features. When a Flare community is integrated with a Pulse system, users have access to the same type of community functions that one would find on a social media site.

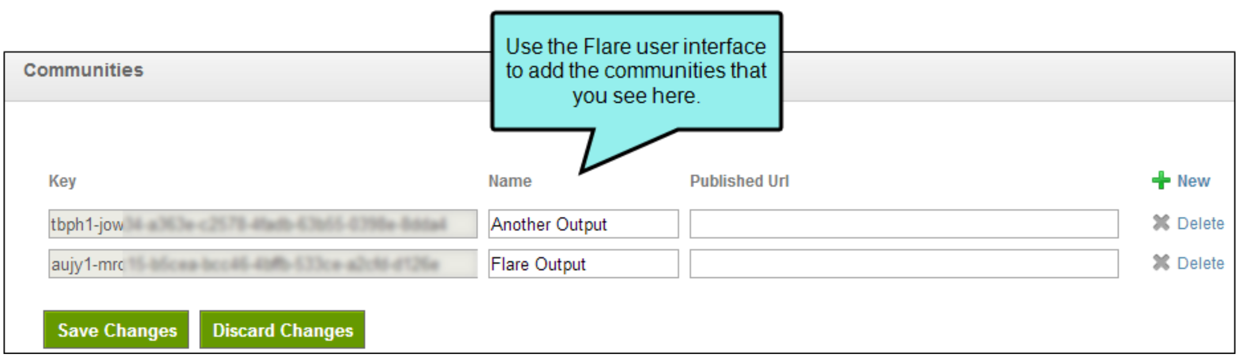
You can manage communities using either the Pulse dashboard or the Flare interface (i.e., the Target Editor).

In the Pulse dashboard, the Administration > Settings menu command is available to members of the Administrators group. This gives you the ability to click **Communities** to view a list of the Flare-communities that have been integrated with Pulse.

Managing a community means that you can add, delete, rename, or provide a published URL for that community. However, for best results, it is recommended that you always add, delete, or rename a Flare community using the Flare user interface, rather than using the Pulse dashboard.

HOW TO MANAGE FLARE COMMUNITIES FROM THE PULSE DASHBOARD

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. Click **Communities**. The Communities page opens. This shows a list of all the communities that have been integrated with Pulse. A key is shown, along with the name of the community. This key is automatically created for you when you install the SQL Server Database.



4. Make any necessary changes. If you want to provide a published URL for a community, in the **Published Url** field type the path to the folder containing your main landing page. Make sure you include http:// at the beginning of the URL.

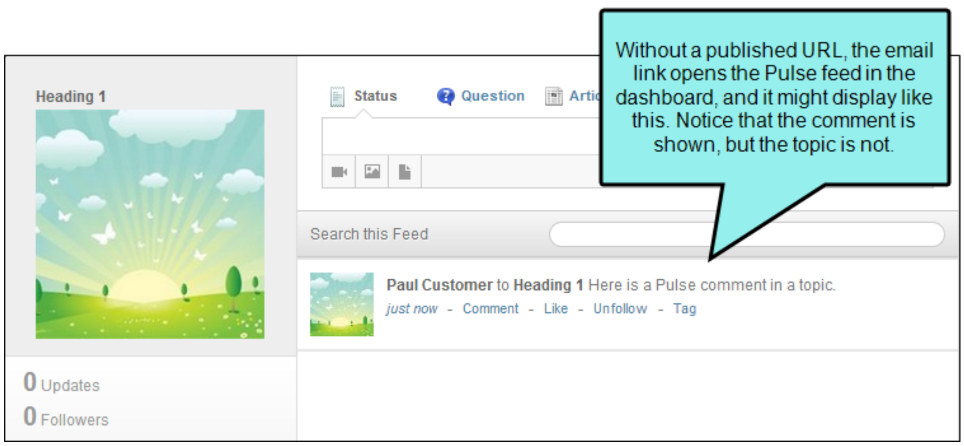
EXAMPLE

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.

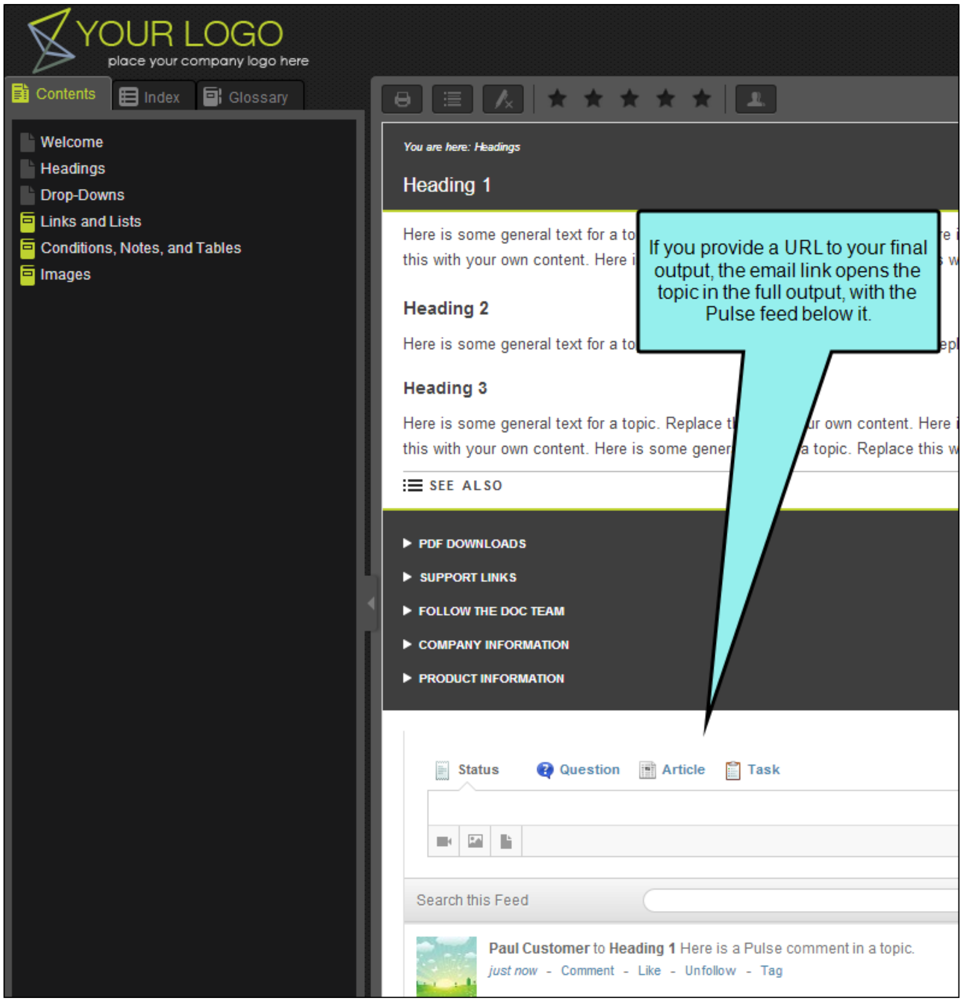
Why is it a good idea to assign a URL path to a community? Because it allows topic feeds to open in context.

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.



5. When you are finished, click **Save Changes**

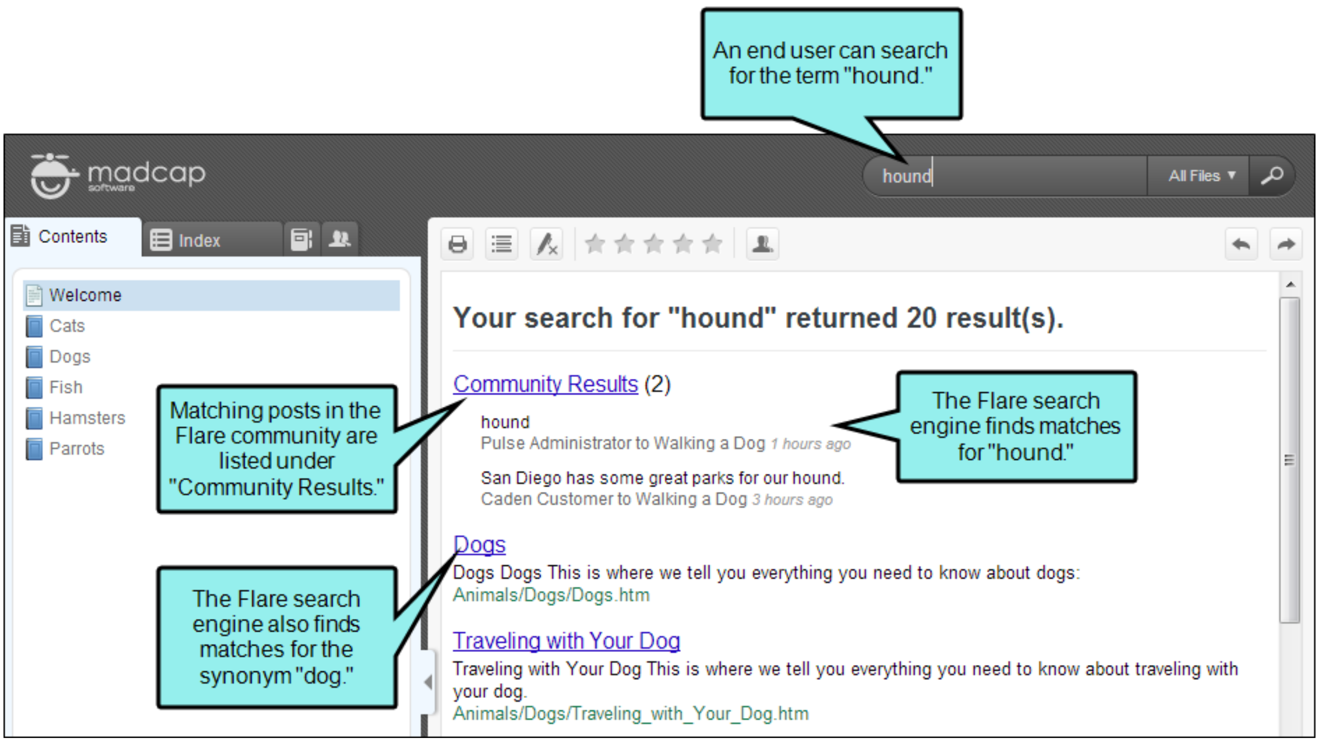
Managing Synonyms

In the Pulse dashboard, the Administration > Settings menu command is available to members of the Administrators group. This gives administrators the ability to create synonyms to enhance the search capabilities of the Flare search engine.

Working with Synonyms

You can enhance the Flare search engine by creating a synonym file for interchangeable words. This gives the Flare search engine to ability to return results that include a similar word, when a user enters a particular word. For example, when a user searches for "hound," the synonym file tells the Flare search engine to also return results that include the synonym "dog."

When integrated with Pulse, the Flare search engine will search both the Flare topic files and the embedded Pulse discussion forms.



There are two ways to create a synonym file to enhance the search capabilities for your Flare output:

- **Using the Flare Synonym Editor** You can create synonyms directly in the Flare user interface. See the Flare online Help.
- **Use the Synonyms Feature in Pulse** Members of the Administrators group can add synonyms to Pulse. If desired, you can also export the synonym file from Pulse and import it into the desired Flare project as described below.

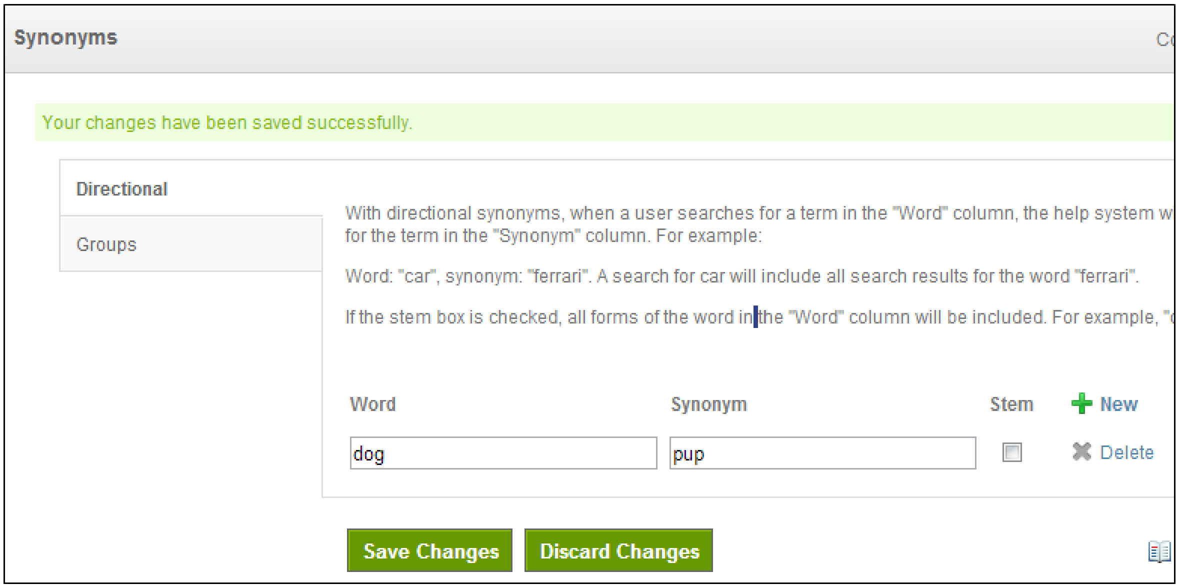
Adding Synonyms in Pulse

You can add two types of synonyms in Pulse: A directional synonym or a synonym group.

HOW TO ADD A DIRECTIONAL SYNONYM

A directional synonym is a word that can only be queried in a single direction. For example, a query for the word "dog" would find results that include the synonym "poodle." However, because the synonym only works in one direction, a query for "poodle" would not find results for "dog."

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens. By default, the Directional tab is active in this page.
4. Select the **Directional** tab.
5. From the **Community** drop-down list, select the desired Flare community.
6. In the **Directional** tab, click **New**A new, blank row for data entry is shown.
7. In the entry fields, do the following:
    a. In the **Word** field, type the desired word. For example, type `dog`.
    b. In the **Synonym** field, type the synonym to include in search results when end users search for the corresponding word. For example, type `pup`.



IMPORTANT: When adding synonyms, the word and synonym must be a single word. The synonym feature does not support phrases, punctuation, or languages.

IMPORTANT: Synonyms are case-sensitive.

8. (Optional) You can place a checkmark in the **Stem** box. This gives the search engine the ability to include all forms of the word in the search. For example, a search for "dog" will include "dogs."
9. Click **Save Changes**. A confirmation message appears when the save is successful.In order for your changes to take effect, you must republish your Flare output.

HOW TO ADD A SYNONYM GROUP

Add a synonym group to perform queries for identical synonyms. An identical synonym is a word that can be queried in two directions. For example, a query for the "dog" would find results that include identical synonyms such as "hound" and "canine." A search for "canine" or "hound" would include the identical synonym "dog."

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens. By default, the Directional tab is active in this page.
4. From the **Community** drop-down list, select the desired Flare community.
5. Select the **Groups** tab, then click **New**.A new, blank row for data entry is shown.
6. In the **Group** field, type the word followed by the equal (=) symbol, and then type a list of synonyms. You must separate each synonym with a comma. For example, type: `dogg=canine,doggy,doggie,hound,pooch,pup,puppy`.
7. (Optional) You can place a checkmark in the **Stem** box. This gives the search engine the ability to include all forms of the word in the search. For example, a search for "dog" will include "dogs."
8. Click **Save Changes**. A confirmation message appears when the save is successful.

Managing Synonyms

You can delete, export, copy, and overwrite synonyms.

HOW TO DELETE A DIRECTIONAL SYNONYM

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens. By default, the Directional tab is active in this page.
4. Select the **Directional** tab.
5. Next to the synonym that you want to remove, click **Delete**. This immediately removes the synonym from the list.
6. When you are finished, click **Save Changes**

HOW TO DELETE A SYNONYM GROUP

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens. By default, the Directional tab is active in this page.
4. Select the **Groups** tab.
5. Next to the synonym group that you want to remove, click **Delete**. This immediately removes the synonym group from the list.
6. When you are finished, click **Save Changes**

EXPORTING A SYNONYM FILE FROM PULSE

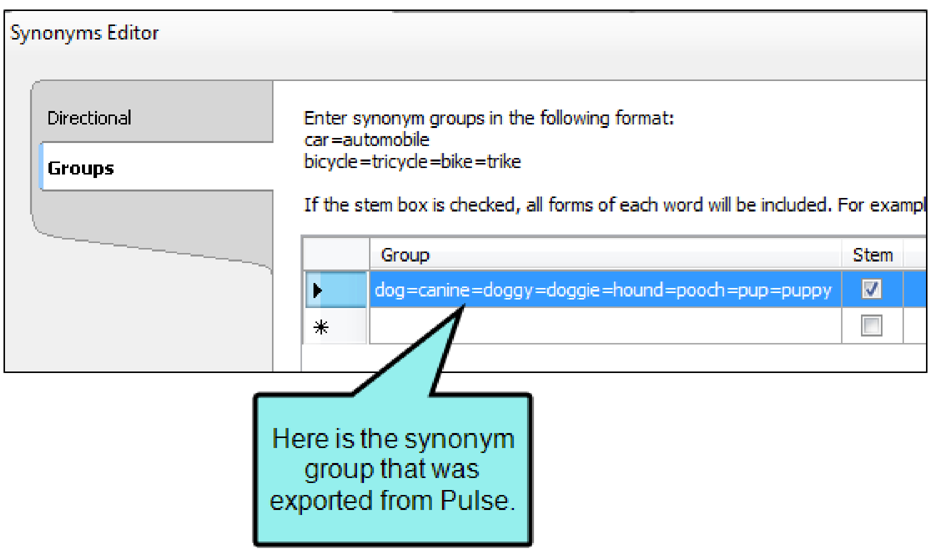
If you want to use the same synonyms that you created for Pulse in a search of the Flare output, you can export the synonym file from Pulse. Then copy it into your Flare project.

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Settings**. The Settings page opens.
3. In the Settings page, click **Synonyms**. The Synonyms page opens. By default, the Directional tab is active in this page.

4. Click the **Export (.mcsyns)** link at the bottom of the page. This downloads a copy of the synonyms file to your computer. The next step is to copy the synonym file to the Flare project.The downloaded file is saved in the MCSYNS file format, so you can import it into your Flare project. If you are not able to download the file, check your browser's download settings.

COPYING A SYNONYM FILE TO A FLARE PROJECT

1. Add or make changes to the synonyms in Pulse.
2. Export the synonym file from Pulse.
3. Ensure that the Flare project where you plan to copy the file is closed.
4. Double-click the synonym file to open it. This starts the Flare program.If the Flare project where you are planning to copy the file is open, an error message appears to inform you the desired Flare project is already open in another instance. Close the open Flare project and then open the synonym file again.
5. In the Copy to Project dialog, select the project where you want to copy the synonym file. Then click **Copy**.The program copies the file to the selected project and places it in the \Project\Advanced folder in the Flare project. It also opens the file in the Synonyms Editor.
6. In the Synonyms Editor, ensure that your synonyms appear. In this example, we added a synonym group.



7. Click  to save your work.

OVERWRITING A SYNONYM FILE IN FLARE

1. Make changes to the synonyms in Pulse.
2. Export the updated synonym file from Pulse.
3. Ensure the file that you exported has the exact same file name as the synonym file in the Flare project. You may need to rename this file to match.
4. Ensure that the Flare project where you plan to copy the file is closed.
5. Double-click the synonym file to open it. This starts the Flare program.

   > IMPORTANT: If the Flare project where you are planning to copy the file is open, an error message appears to inform you the desired Flare project is already open in another instance. Close the open Flare project and then open the synonym file again.

6. In the Copy to Project dialog, select the project where you want to copy the synonym file. Then click **Copy**.

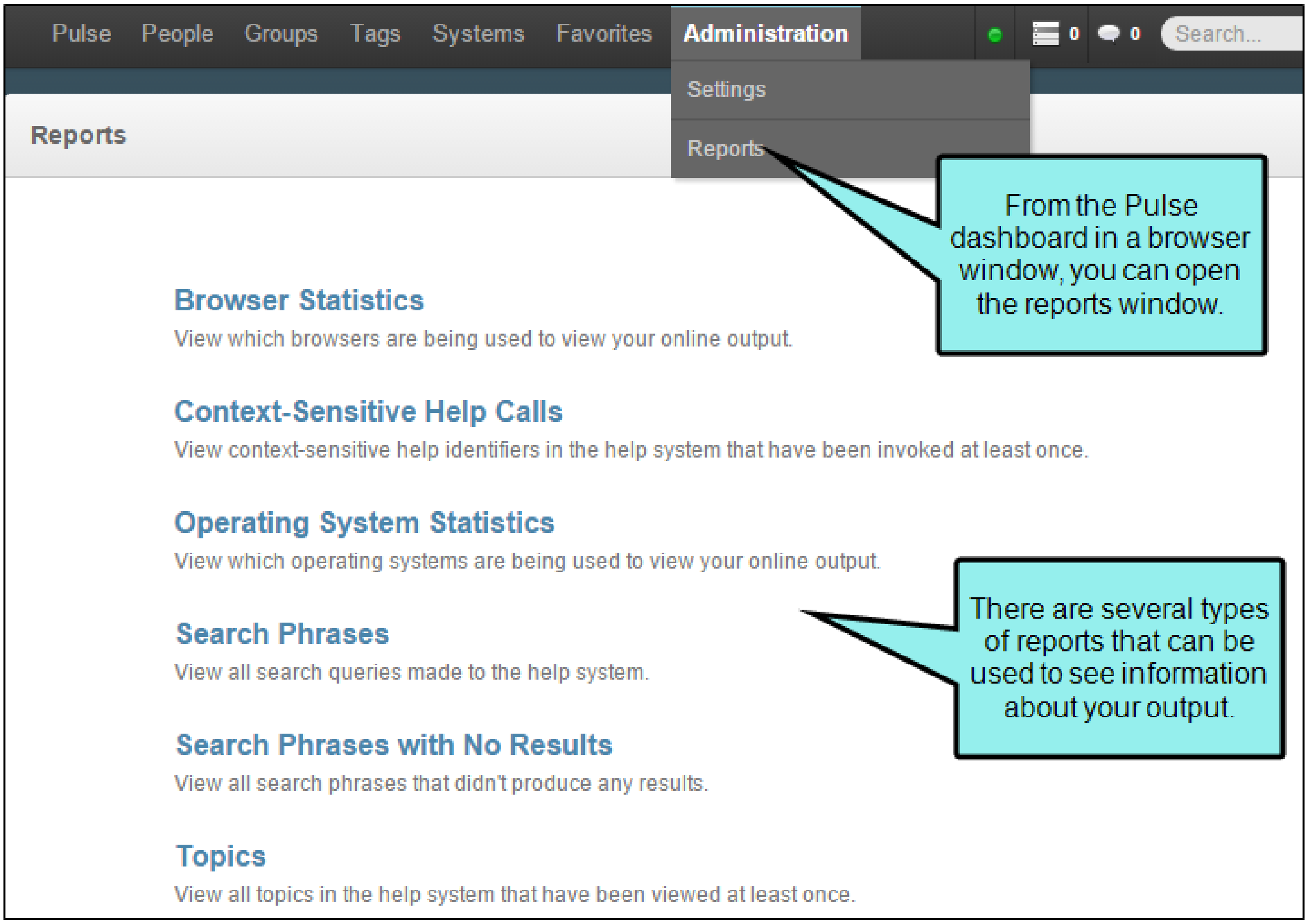
   The program copies the file to the selected project and places it in the \Project\Advanced folder in the Flare project. The program also opens the file in the Synonyms Editor.

   When Flare recognizes that a target file with the same file name exists, the Copy File dialog appears.

7. In the Copy File dialog, make sure that the appropriate source file and target file names appear. Then click **Overwrite**.
8. In the Synonyms Editor, ensure that your updated synonyms appear.
9. Click to save your work.

Reports

Pulse provides members of the Administrators group with access to a variety of system- and community-specific reports.



Report Types

From the Pulse dashboard, you can generate report information about each Flare community that you've set up. You can also run system-wide reports that show usage information for the entire Pulse system.

COMMUNITY REPORTS

The following table details the community reports. Data is presented in reports for the selected community for the date period you specify. Each report lets you select a chart type from the Style list.

Report Name	Description	Export Report Data?	
		CSV	TXT
Browser Statistics	See which browsers are being used to view your online output.	✓	✓
Context-sensitive Help Calls	See context-sensitive Help identifiers that have been invoked at least once in the output.	✓	✓
Operating System Statistics	See which operating systems are being used to view your online output.	✓	✓
Search Phrases	See all search queries made to the output.	✓	✓
Search Phrases with No Results	See all search phrases that didn't produce any results.	✓	✓
Topics	See all topics in the output that have been viewed at least once.	✓	✓

SYSTEM REPORTS

The following table details the system reports.

Report Name	Description	Chart Style	Export Report Data?	
			CSV	TXT
User Count	See the number of users who have posted to the Pulse system. This presents data for all communities combined during the date period you specify.	Line	✔	✖
Engaged Users	See the number of users who have posted to this community.	Line	✔	✖
Overall Activity	See the overall activity in Pulse. This presents data for all communities combined during the date period you specify.	Line	✔	✖
User Activity	See Pulse activities for a specific user. This presents data for one selected user for the date period you specify.	Line	✔	✖
Most Active People	See the most active users. This presents data for all system users for the date period you specify.	Column	✔	✖
Most Active Groups	Shows the most active groups and embedded discussions in the project.	Column	✔	✖
Most Followed People	See the users with the most followers.	Column	✔	✖
Most Liked People	See the most liked users for the time period you specify.	Column	✔	✖
Most Commented People	See the users with the most comments on their posts for the time period you specify.	Column	✔	✖
Most Liked Activities	See the activities that have the most likes for the time period you specify.	Column	✔	✖

Report Name	Description	Chart Style	Export Report Data?	
			CSV	TXT
Most Commented Activities	See the activities that have the most comments for the time period you specify.	Column	✔	✖
Most Liked File Shares	See the shared files that have the most likes for the time period you specify.	Column	✔	✖
Most Commented File Shares	See the shared files that have the most comments for the time period you specify.	Column	✔	✖
Most Liked Image Shares	See the shared images that have the most likes for the time period you specify.	Column	✔	✖
Most Commented Image Shares	See the shared images that have the most comments for the time period you specify.	Column	✔	✖
Most Liked Link Shares	See the shared links that have the most likes for the time period you specify.	Column	✔	✖
Most Commented Link Shares	See the shared links that have the most comments for the time period you specify.	Column	✔	✖
Storage Usage	See the storage being used by shared files and images for the time period you specify.	Line	✔	✖
Monthly Active Users	See the number of users who have accessed the system by month.	Column	✔	✖

Running and Formatting Reports

You can run and format a variety of different reports in Pulse.

HOW TO RUN A REPORT

1. Log in to the Pulse dashboard using an account that is a member of the Administrators group.
2. Select **Administration > Reports**. The Reports page opens.
3. Click the desired report name to open it. The available formatting options depend on whether you are running a community or system report.

HOW TO FORMAT A COMMUNITY REPORT

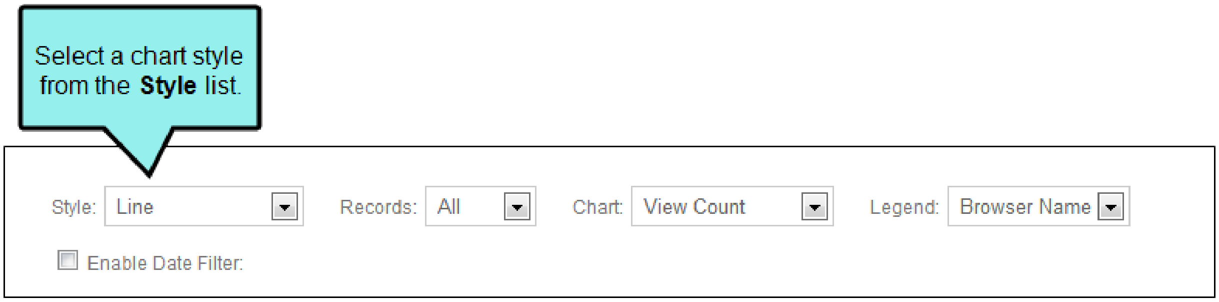
Following are ways to format a community report.

HOW TO SELECT A COMMUNITY

If the selected report supports the ability to filter data for each Flare community in your Pulse system, select one of your communities from the **Community** list.

HOW TO SELECT A CHART STYLE

If the selected report supports the ability to select a style for rendering your chart data, select one of the available chart styles from the **Styles** drop-down list.



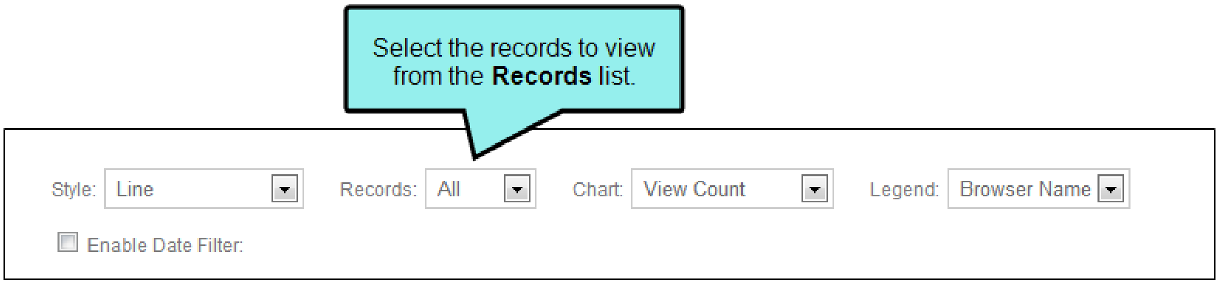
The table below details the available chart styles:

Style	Description
Area	Compares two or more quantities and is used to represent cumulative totals.
Bar	Compares multiple data points using horizontal bars with lengths that are proportional to the values represented.
Box Plot	Summarizes the statistical distribution of multiple data points using box and whisker plotting.
Bubble	Represents data points using bubbles.
Column	Compares multiple data points using vertical bars with lengths that are proportional to the values represented.
Doughnut	Depicts numerical proportion. Like a pie chart, the length of each section in the chart is proportional to the quantity it represents. The only difference is that a pie chart does not have a hollow center.
Line	Connects a series of data points using straight line segments.
Pie	Depicts numerical proportion. The length of each section in the chart is proportional to the quantity it represents.

Style	Description
Point	Represents data values using points.
Spline	Similar to a line chart, only the line used to draw the data points use a fitted curve.
Spline Area	Similar to an area chart, only the line used to draw the data points use a fitted curve.
Stacked Area	Similar to an area chart in that it compares two or more quantities and is used to represent cumulative totals. However, it also shows the relationship of the part to the whole.
Stacked Bar	Similar to a bar chart in that it compares multiple data points using horizontal bars with lengths that are proportional to the values represented. However, it also shows the relationship of parts to the whole.
Stacked Column	Similar to a column chart in that it compares multiple data points using vertical columns with lengths that are proportional to the values represented. However, it also shows the relationship of parts to the whole.
Step Line	Connects data points together using horizontal and vertical lines.

HOW TO FILTER REPORT RECORDS

If the selected report supports the ability to filter the records that you include, select one of the listed options from the **Records** drop-down list.

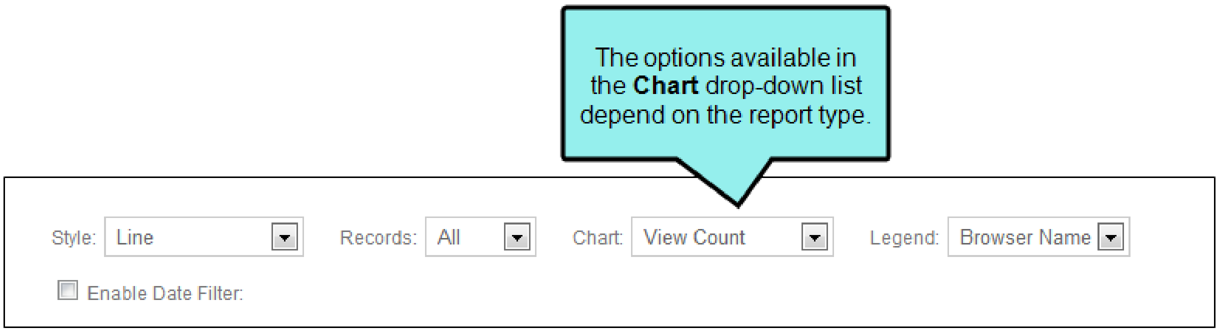


The table below describes the options in the drop-down list:

Records	Description
All	Includes all records in the report.
Top 10	Includes only the top 10 records.
Top 25	Includes only the top 25 records.
Top 50	Includes only the top 50 records.

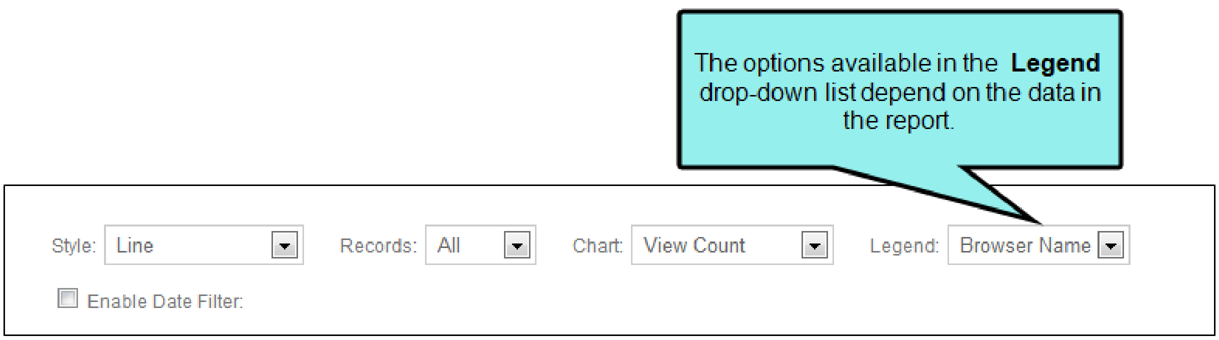
HOW TO SWITCH THE CHART VIEW

If the selected report supports the ability to filter the records that you include, select one of the listed options from the **Chart** drop-down list. The options available depend on the report type.



HOW TO SELECT THE REPORT LEGEND

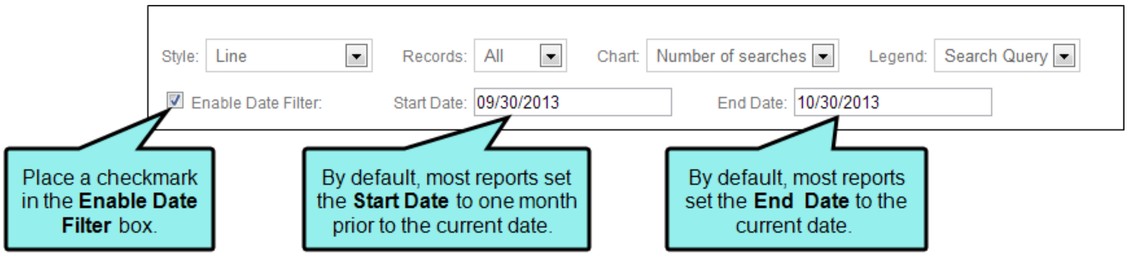
If the selected report supports the ability to include a report legend, select one of the listed options from the **Legend** drop-down list. The options available depend on the data in the report.



HOW TO ENABLE THE DATE FILTER

If the selected report supports the ability to enable a data filter, do the following:

a. Place a check mark in the **Enable Date Filter** box. This reveals the **Start Date** and **End Date** fields.



> NOTE: Most reports define the report period to the previous month by default.

b. Place the mouse cursor in the **Start Date** box to reveal a drop-down calendar where you can navigate to the desired start date. You can click the arrows to switch between months.

c. Repeat the same action in the **End Date** box.

HOW TO FORMAT A SYSTEM REPORT

For system reports, the chart style for the report is predetermined. However, you do have the ability to specify the desired reporting period as follows:

a. Open the desired system report. This reveals the Start Date and End Date fields.

b. Place the mouse cursor in the **Start Date** box to reveal a drop-down calendar where you can navigate to the desired start date. You can click the arrows to switch between months.

c. Repeat the same action in the **End Date** box.

4. When ready to generate the report, click **Run**.

HOW TO EXPORT A REPORT

You can download a copy of the current report to your local drive.

1. Run the desired report.
2. At the bottom of the page, click the **Export** link.

   > NOTE: Community reports can be downloaded in CSV or TXT format. System reports can be downloaded in CSV format only.

> NOTE: A refresh button is available in some Pulse reports, allowing you to update the data while the report is open. The button is available on reports that have a drop-down in the upper-right corner that lets you switch from one community to another. By clicking **Refresh Data** instead of pressing F5, the report data updates for the selected community. If instead you press F5, the drop-down switches to the first community in the list.

CHAPTER 8

Messaging Tasks

AVAILABLE TO: **Administrators**, **Employees**, and **Customers**

The Messages app gives you the ability to read, send, and hide conversations with other Pulse users. You must access the Messages app from the Pulse dashboard. Messages are not accessible from the Flare output.

This chapter discusses the following:

Sending a New Message

Use the following steps to send a new message.

HOW TO SEND A NEW MESSAGE

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse > Messages**.
   - In the top-right corner of the page, click the  button.
3. In the Messages page, click **New Message**.
4. In the New Message dialog, do the following:
   - **To** Start typing the name of a registered user and then select the appropriate match from the list.
   - **Message** Type the body of your message in the space provided.
   - **Add Attachment** Click to add a file attachment.
5. Click **Send**.

Viewing Messages

Use the following steps to view your messages.

HOW TO VIEW YOUR MESSAGES

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse > Messages**.
   - In the top-right corner of the page, click the  button.
3. In the Messages page, your most recent messages and conversations appear in the list.
4. Click a message to open the conversation thread.

Loading Earlier Messages

Use the following steps to load earlier messages.

HOW TO LOAD EARLIER MESSAGES

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse > Messages**.
   - In the top-right corner of the page, click the  button.
3. In the Messages page, your most recent messages and conversations appear in the list.
4. Click a message to open the conversation thread.
5. Click the **Load earlier messages** link.

Replying to Messages

Use the following steps to reply to a message.

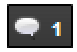
HOW TO REPLY TO A MESSAGE

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select Pulse > Messages.
   - In the top-right corner of the page, click the  button.
3. In the Messages page, click one of your messages. This opens the message or conversation.
4. In the space provided, type your reply.
5. If you want to add an attachment, click Add Attachment. Then select the file to attach.
6. Click Reply.

Downloading Message Attachments

Use the following steps to download a message attachment.

HOW TO DOWNLOAD A MESSAGE ATTACHMENT

1. Log in to the Pulse dashboard.
2. In the Pulse dashboard choose one of these options:
   - From the menu bar, select **Pulse > Messages**.
   - In the top-right corner of the page, click the  button.
3. In the Messages page, your most recent messages and conversations appear in the list.
4. Click a message to open the conversation thread.
5. Click the desired attachment to download it to your computer.

> NOTE: If you do not know how to access the Pulse dashboard, see the Pulse Server Administrator for the Site URL.

Contacting Registered Users

AVAILABLE TO: **Administrators** and **Employees**

Using the Pulse dashboard, members of the Administrators and Employees group can contact other registered users using the chat and messaging features.

Using a Pulse Chat

Pulse offers members of the Administrators and Employees group a chat feature where you can initiate a conversation with any registered user. You can also send chat messages using the same method available to members of the Customers group. See "Sending Chat Messages" on page 153.

HOW TO USE PULSE CHAT

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **People > Find People**.
3. In the Find People page, click the desired user name.
4. In the user's page, click . This opens a chat window in the lower-right corner of your browser.
5. Enter a message text in the space provided. Then press **Enter** to send the conversation.

> NOTE: If the user is not online, your conversation will appear in their Pulse inbox on their Messages page. See "Using the Pulse Menu" on page 19.

6. Click the paperclip icon to add an attachment.

Sending a Message

Registered users can create and send messages to other registered users. To learn about more of the messaging features, see "Using the Pulse Menu" on page 19.

HOW TO SEND A MESSAGE

1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select **Pulse > Messages**.
   - In the top-right corner of the page, click the  button.
3. In the Messages page, click **New Message**.
4. In the New Message dialog, do the following:
   - **To** Start typing the name of a registered user and then select the appropriate match from the list.
   - **Message** Type the body of your message in the space provided.
   - **Add Attachment** Click to add a file attachment.
5. Click **Send**.

Replying to a Message

Use the following steps to reply to a message.

HOW TO REPLY TO A MESSAGE

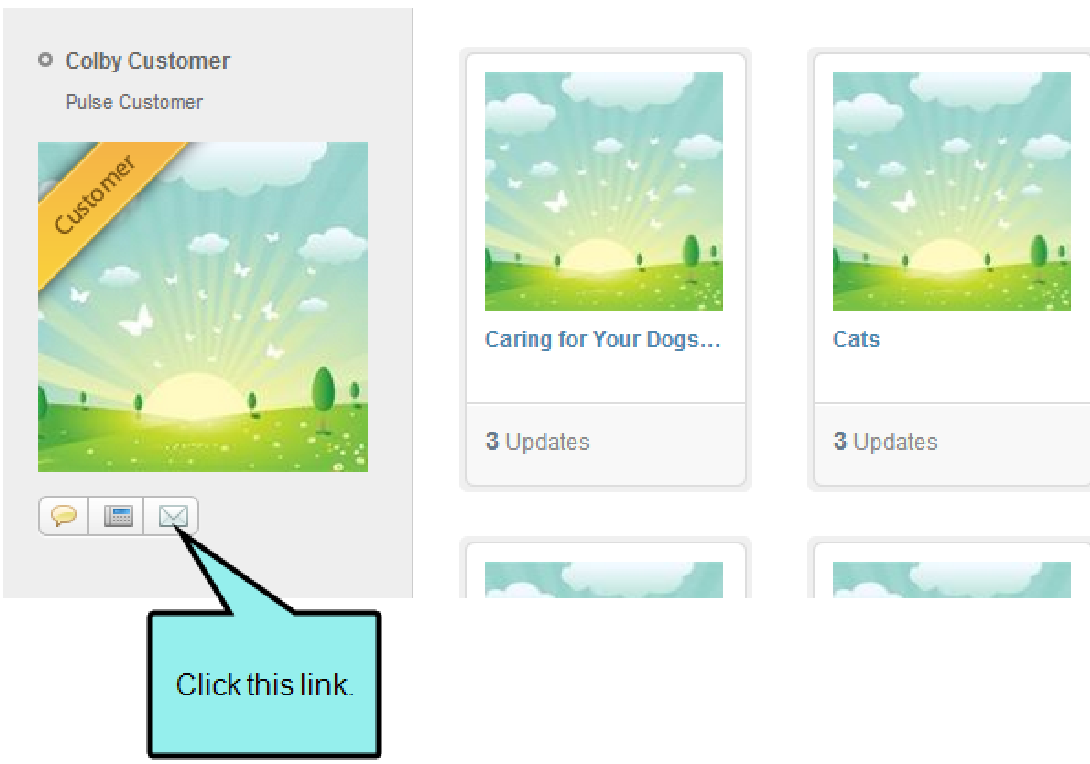
1. Log in to the Pulse dashboard.
2. In the dashboard, choose one of these options:
   - From the menu bar, select Pulse > Messages.
   - In the top-right corner of the page, click the  button.
3. In the Messages page, click one of your messages. This opens the message or conversation.
4. In the space provided, type your reply.
5. If you want to add an attachment, click Add Attachment. Then select the file to attach.
6. Click Reply.

Contacting Users by Email

If your computer is set up with a local email client, such as Microsoft Outlook, you can launch it from Pulse. This lets you send an email from your regular email account using the "mailto" command (e.g., mailto:name@example.com).

HOW TO CONTACT USERS BY EMAIL

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **People > Find People**.
3. In the Find People page, click the desired user.
4. Click the email link.



If your computer is properly configured, this opens your email client. If you do not know how to configure an email client on your computer, please see your IT or Email Administrator.

Notifications

AVAILABLE TO: **Administrators**, **Employees**, and **Customers**

Do you want to receive notifications when a Pulse users posts an answer to one of your questions? Or be notified when someone asks a question about a particular Flare topic? Pulse provides users with a convenient way to sign up to receive email notifications about different system events and activities.

Notification Types

Pulse provides users with these notification types:

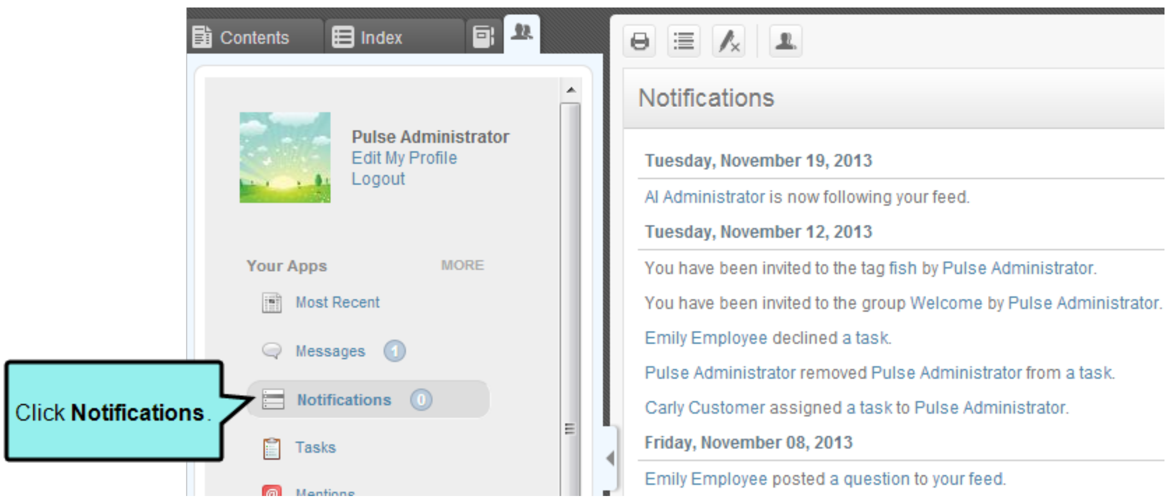
- **Comments** Notifies you when people comment on your posts.
- **Answers** Notifies you when people post answers to your questions.
- **Mentions** Notifies you when people mention you in their posts.
- **Invites** Notifies you when people invite you to join Pulse system feeds.
- **Tasks** Notifies you when you are assigned a task to complete.

Checking Notifications

Pulse allows you to check your notifications.

HOW TO CHECK YOUR NOTIFICATIONS

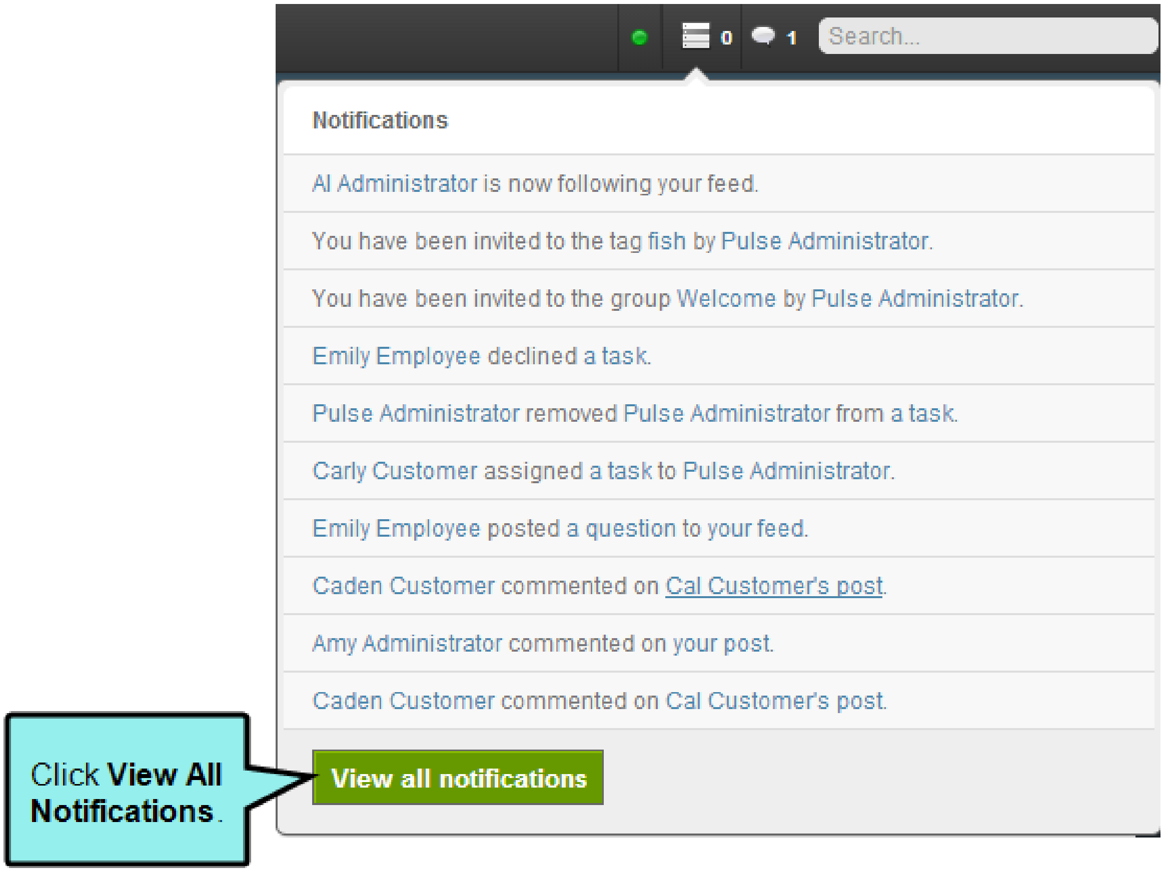
1. Open the Notifications app using one of these options:
   - **Flare Output** In a web browser, navigate to the Flare output. Then log in to the Pulse system. Click the **Community** tab in the Flare output. Under the Your Apps list, click **Notifications**.



> NOTE: The Your Apps list in the only available to members of the Administrators and Employees groups. It is not available to members of the Customers group.

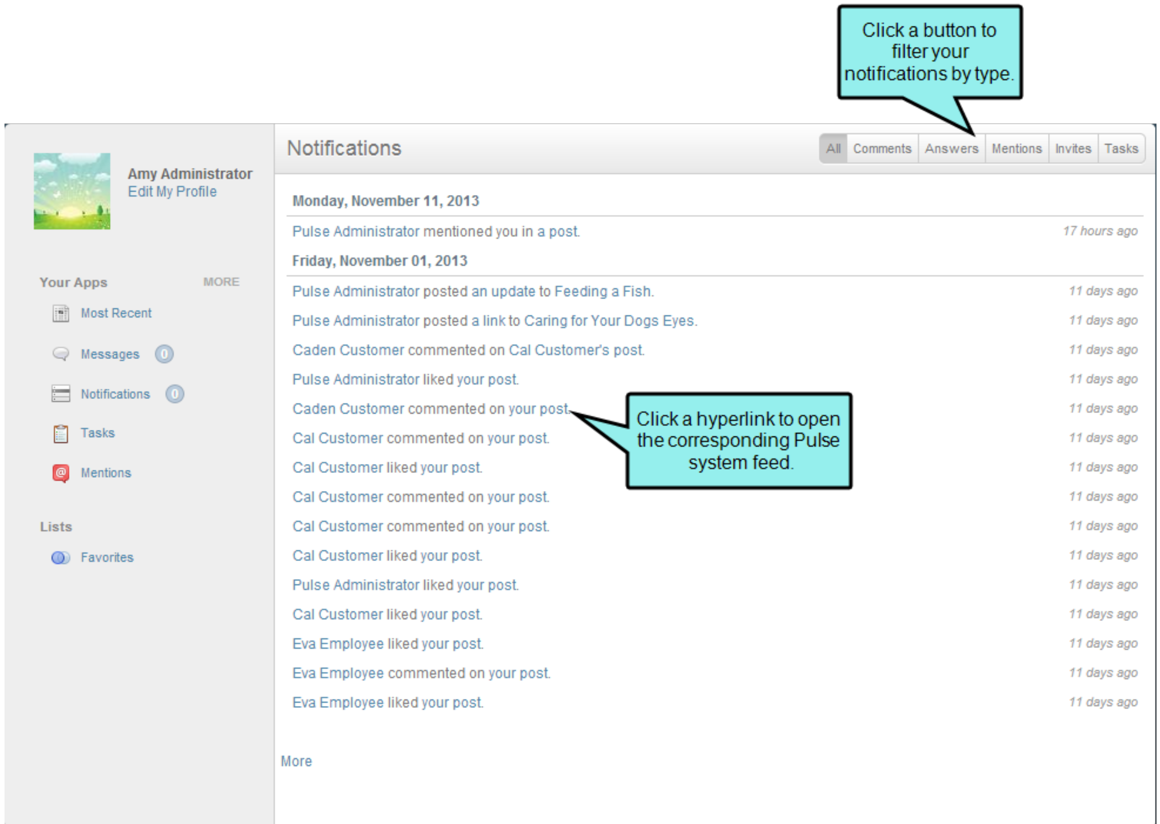
> NOTE: You can select which applications display in the Your Apps menu.

- **Pulse Dashboard** Log in to the Pulse dashboard. Then click in the upper-right corner of the dashboard. In the drop-down message, click **View All Notifications**.



2. In the Notifications page, all of your notifications are listed. You have these options:

  - Click one of the hyperlinks in the notifications page to open the corresponding Pulse feed.
  - Click one of the buttons in the upper-right corner of the page to filter your notifications by type.



Signing Up for Email Notifications

When Pulse issues a notification, it appears in the Notifications app. If you would like Pulse to send you an email message as well, enable the appropriate setting in the Notifications tab on the Settings page of your profile.

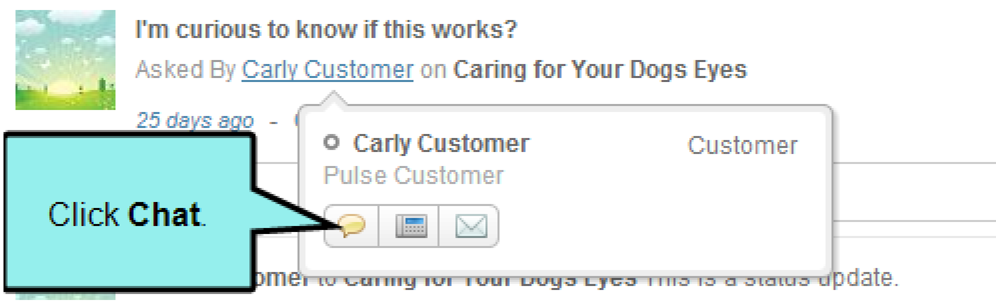
Sending Chat Messages

AVAILABLE TO: **Administrators**, **Employees**, and **Customers**

Chat features are available to all registered Pulse users. You can initiate a chat if you are a member of the Customers group. Members of the Administrators and Employees group have additional chat options. See "Contacting Registered Users" on page 144.

HOW TO INITIATE A CHAT SESSION

1. Log in to Pulse.
2. Hover the mouse cursor over a username.
3. When the popup menu appears, click the **Chat** button.



This reveals the Conversation with Customer Name window, where you can enter your message and attach a document. If the user is not online, Pulse will notify the recipient.

CHAPTER 9

Searching the Pulse Dashboard

AVAILABLE TO: Administrators and Employees

You can search the Pulse dashboard for information and even follow searches.

This chapter discusses the following:

Searching the Pulse Dashboard

You can search the entire Pulse system or a feed.

HOW TO SEARCH THE ENTIRE PULSE SYSTEM

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. In the upper-right corner of the dashboard, type a search query and select one of the following menu options:
   - **Search for Posts with this Phrase** Limits the scope of the search to post activities.
   - **Search for Messages with this Phrase** Limits the scope of the search to messaging activities.

HOW TO SEARCH A FEED

1. In the Pulse dashboard, navigate to a system, user, or group feed.
2. In the feed, type a search query in the **Search this Feed** box.

Following Searches

If you are a member of the Administrators or Employees group, you can perform a search and then follow the results from the Pulse dashboard.

CHAPTER 10

Pulse Dashboard Frequently Asked Questions

Following are some frequent questions about administration tasks for the Pulse dashboard.

This chapter discusses the following:

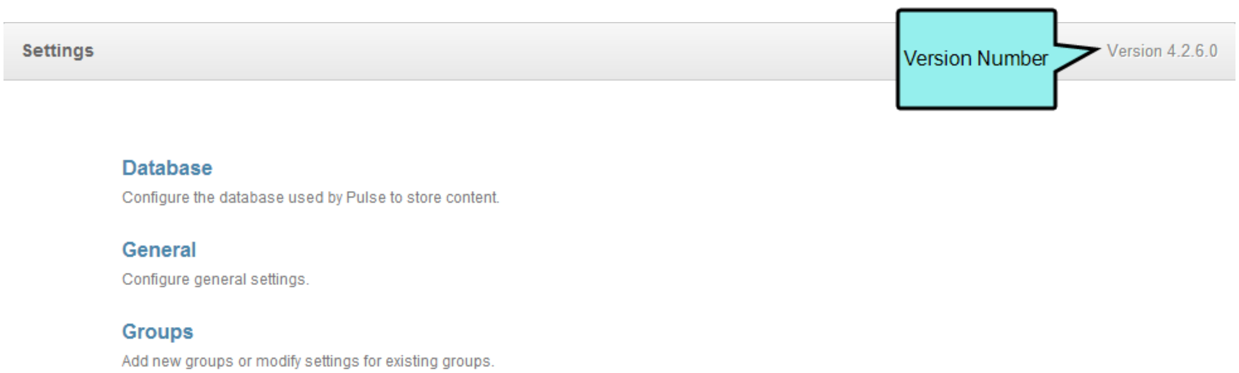
General Settings

Following are general frequently asked questions about the dashboard.

Log in to the Pulse dashboard as an administrator.

WHAT VERSION NUMBER DO I HAVE?

1. Log in to the Pulse dashboard as an administrator.
2. Select Administration > Settings.The Pulse version number appears in the top right-corner of the page.



Managing Accounts

If you are a member of the Administrators group and responsible for Pulse user administration, here are some answers to frequently asked questions.

WHO CAN DISABLE OR DELETE USER ACCOUNTS?

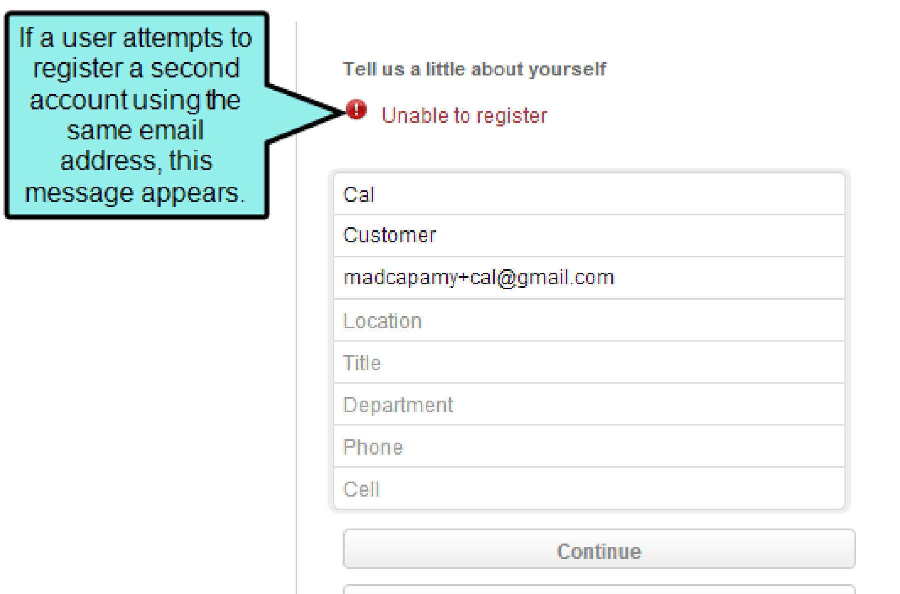
Pulse user accounts can be disabled or deleted by these individuals:

- **Pulse Administrators** Members of the Administrators group can disable to delete user accounts from the Administration > Settings menu. Members of the Employees and Customers groups cannot delete user accounts, including their own account.
- **SQL Server Administrator** If you have administrative permissions to SQL Server, you can remove user information directly from the SQL database. This will immediately remove a user from Pulse.

For more information about users, see "Managing Users" on page 93.

CAN USERS CREATE TWO ACCOUNTS WITH THE SAME EMAIL ADDRESS?

Pulse does not allow users to create two accounts with the same email address. If a user attempts to register for a second account using the same email address, they will see the "Unable to register" error shown below:



HOW CAN I REUSE AN EMAIL ADDRESS?

If you delete a user account in the Pulse dashboard, access to Pulse features is immediately revoked. However, to give a user the ability to reuse an email address in Pulse, you must also delete the user from the dbo.Users and dbo.Login tables in SQL Server. If you are using SQL Server Management Studio you can right-click the user and select **Delete** from the context menu. Once the entries are deleted, the email can be used to create a new Pulse account.

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