MadCap Software

User Guide
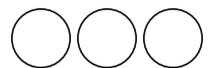
Pulse

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THIS GUIDE WAS CREATED USING MADCAP FLARE.

CONTENTS

CHAPTER 1

Getting Started

As a user, getting started with Pulse involves registering for an account, logging in, and creating your profile.

This chapter discusses the following:

Registering for a Pulse Account

When you integrate a Pulse system with a Flare community, there are two methods for joining the community. Both methods require you to register and activate an account.

User Account Requirements

In order to register and activate a Pulse user account, you must have the following information:

» **An Email Address**

» **An Internet Connection and a Compatible Web Browser**

» **(Optional) A Pulse Invitation** You can register for Pulse with or without an invitation. However, some organizations might decided to send their users an invitation to join.

Registering for a Pulse Account

Use one of these methods to register for a Pulse account:

HOW TO REGISTER FROM AN INVITATION

If you are invited to join Pulse, you will receive an email to join the community from the Pulse system. The invitation is sent by a member of the Administrators group.

1. Check your email Inbox for the "You have been invited to Pulse" message.

2. Open the message. Then click the **Login** link in the body of the invite. This opens the Setup Your Account page in a web browser.

3. At the How Would You Like to Login dialog, do the following:

   a. Select the **With my e-mail address and a password** button.

   b. Type a unique password in the **Enter a Password** box. Your password must be a minimum of seven (7) characters.

   c. Click **Continue**.

4. In the Tell Us A Little About Yourself dialog, verify and enter the following information. An asterisk (*) denotes required fields:

   » ***First Name** The first name of the user.

   » ***Last Name** The last name of the user.

   » ***Email Address** A valid email address for the user.

   » **Location** A location for the user, such as La Jolla or New York City.

   » **Title** A title for the contact, such as a professional or job title.

> » **Phone** A telephone number for the user.
>
> » **Cell** A mobile phone number for the user.

5. At the Your Account is Ready dialog, click **Go to My Feed**.

   The Home page displays. Depending on the group membership of your user account, you will have different options available to you.

HOW TO REGISTER FROM THE PULSE DASHBOARD

1. In a web browser, navigate to the Site URL for the Pulse dashboard.

   > **Note:** If you do not know the Site URL, see the Administrator who installed your Pulse server. Alternatively, if you have access to a Flare target that has already been integrated with the Pulse server, you can open the Community tab and find the URL listed there.

2. At the Pulse Account Login page, click **Register**.

3. In the Register page that appears, type the following information. An asterisk (*) denotes the required fields:

   > » ***First Name** The first name of the user.
   >
   > » ***Last Name** The last name of the user.
   >
   > » ***Email Address** A valid email address for the user.
   >
   > » ***Password** This is the password for the user account. It must be a minimum of 7 characters in length.
   >
   > » ***Confirm Password** Re-enter the password.
   >
   > » **Title** A title for the contact, such as a professional or job title.
   >
   > » **Department** A department name for the user, such as Engineering or Sales.
   >
   > » **Location** A location for the user, such as La Jolla or New York City.
   >
   > » **Phone** A telephone number for the user.
   >
   > » **Cell** A mobile phone number for the user.

4. Click **Register**. The Validate Email Address page appears.

1. In a web browser, navigate to the Flare output (e.g., the MadCap Flare online Help can be found at **web-help.madcapsoftware.com**).

   Depending on the Pulse features that have been enabled for the output, you can click one of the following links:

   » **Register Link in the Embedded Discussion Form**
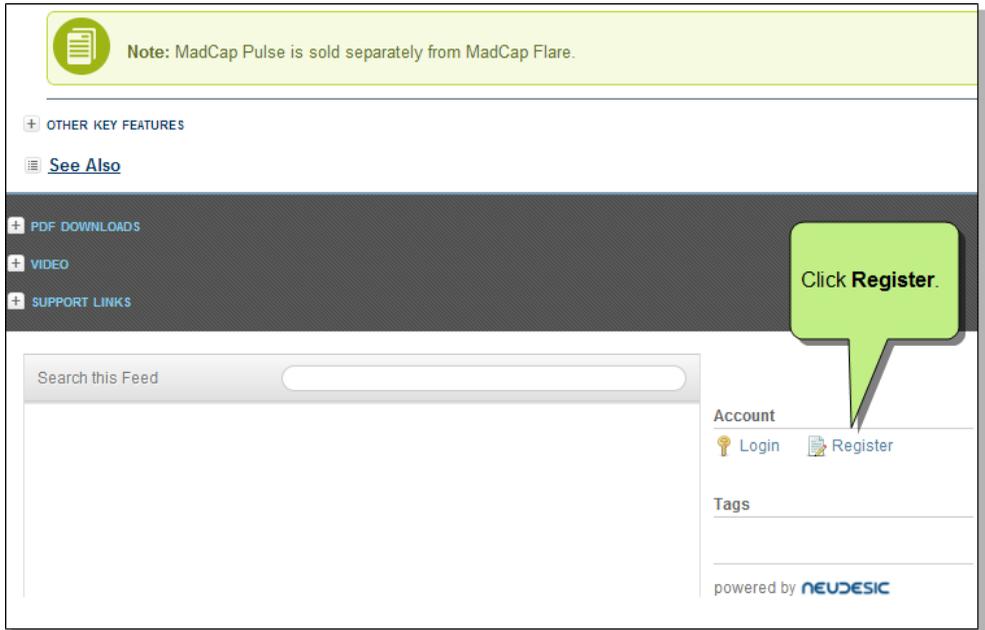
>> **Register Link in the Community Tab** This tab is only available when it is enabled by the content developer.

2. In the Register page that appears, type the following information. An asterisk (*) denotes the required fields:

>> ***First Name** The first name of the user.

>> ***Last Name** The last name of the user.

>> ***Email Address** A valid email address for the user.

>> ***Password** This is the password for the user account. It must be a minimum of 7 characters in length.

>> ***Confirm Password** Re-enter the password.

>> **Title** A title for the contact, such as a professional or job title.

>> **Department** A department name for the user, such as Engineering or Sales.

>> **Location** A location for the user, such as La Jolla or New York City.

>> **Phone** A telephone number for the user.

>> **Cell** A mobile phone number for the user.

3. Click **Register**. The Validate Email Address page appears.

Activating Your Pulse Account

You also need to activate your account.

1. Register for a Pulse account.
2. When the Validate Email Address page appears, check your email Inbox for the "Pulse User Profile Activation" message and open it.
3. Click the **Complete Registration** link. This opens the Register - Activation Success page in a web browser.
4. In the Activation Success page, click **Close Window** to quit your browser.

Troubleshooting Registration Issues

If you are attempting to register for a Pulse account and encounter a message that says "A user name for that email address already exists," it may be possible that:

» You have already created a Pulse account and need a new password.

» You have already created a Pulse account and need to complete the registration process.

» Someone accidentally entered your email address when creating a Pulse account. However, since they entered your email address, the confirmation email was delivered to your email address and the person was never able to confirm that registration.

In any of these events, it is easy to reclaim your Pulse account.

HOW TO RECLAIM YOUR PULSE ACCOUNT

1. Go to the password recovery page. Depending on the interface, you can get there using these options:

    » **From the Online Documentation** Visit the Flare output files and under **Account**, click the **Login** link. In the Pulse Account Login page, click the **Forgot your password?** link.

    » **From the Pulse Server Admin Tool** Simply visit this link: **http://pulse.mad-capsoftware.com/Pulse/ForgotPassword**

2. In the Forgot Your Password page, type your email address.
3. Click the **Send Instruction** button.
4. In the Email Sent dialog, click **Ok** to close the message that your password has been reset.
5. Open your email inbox and look for the "Reset your password" message.
6. Click the **Reset your password** link.
7. In the Reset Your Password page, type a unique password for your account in the **New Password** and **Confirm Password** boxes.
8. Click **Reset Password**.
9. If you password is successfully reset, a confirmation page appears. Click **Close Window**.

Logging In to Pulse

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

Once you have registered for a Pulse account, you can log in to the Pulse dashboard or you can log in to the published Flare output to use the community features.

Logging in to a Flare Community

There are several ways to log in to Pulse. The log in options available depend on the features that the Flare author enabled.

HOW TO LOG IN/OUT USING THE COMMUNITY TAB

1. In a web browser, go to the URL hosting your published Flare content (e.g., the MadCap Flare online Help can be found at **webhelp.madcapsoftware.com**).

2. Click the **Community** tab. Then, click **Login**.
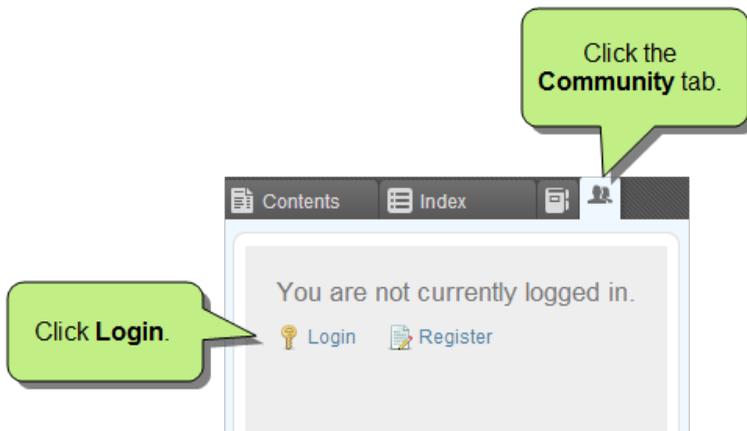
Note: A content developer must enable the Community tab for the Flare output using a skin.

3. In the Pulse Account Login dialog, type the following information:

   » **Email Address** Type the email address that you used when registering for Pulse. Your email address is always your username. If you are logging in with the main Administrator account, in this field you can enter `pulseadmin`.

   » **Password** Type the password that you created for that email address. If you are logging in with the main Administrator account, this is the password that was created when Pulse was configured.

4. (Optional) Place a check mark in the **Keep me signed in** box.

> **Note:** When selected, Pulse will remember the account information that you used to log in and won't ask you to enter your credentials again as long as you are using the same browser on the same computer or device.

5. Click **Login**.

1. In a web browser, go to the URL for your published online output (e.g., the MadCap Flare online Help can be found at **webhelp.madcapsoftware.com**).

2. In the **Account** area of a topic feed (i.e., the area at the bottom of any topic in the output), click **Login**.

The Pulse Account Login dialog opens.

3. In the Pulse Account Login dialog, type the following information:

    » **Email Address** Type the email address that you used when registering for Pulse. Your email address is always your username. If you are logging in with the main Administrator account, in this field you can enter `pulseadmin`.

    » **Password** Type the password that you created for that email address. If you are logging in with the main Administrator account, this is the password that was created when Pulse was configured.

    > **Note:** If you do not have an account, you can register for one. See "Registering for a Pulse Account" on page 6.

4. (Optional) Place a check mark in the **Keep me signed in** box.

    > **Note:** When selected, Pulse will remember the account information that you used to log in and won't ask you to enter your credentials again as long as you are using the same browser on the same computer or device.

5. Click **Login**.

Logging in to the Pulse Dashboard

1. In a web browser, go to the Site URL for your Pulse server.

> **Note:** If you do not know the Site URL, see the Administrator who installed your Pulse server. Alternatively, if you have access to a Flare target that has already been integrated with the Pulse server, you can open the Community tab and find the URL listed there.

    This opens the Pulse Account Login dialog.

2. In the Pulse Account Login dialog, type the following information:

    » **Email Address** Type the email address that you used when registering for Pulse. Your email address is always your username. If you are logging in with the main Administrator account, in this field you can enter `pulseadmin`.

    » **Password** Type the password that you created for that email address. If you are logging in with the main Administrator account, this is the password that was created when Pulse was configured.

3. (Optional) Place a check mark in the **Keep me signed in** box. When selected, Pulse will remember the account information that you used to log in and won't ask you to enter your credentials again as long as you are using the same browser on the same computer or device.

4. Click **Login**.

Troubleshooting Login Issues

Below are resolutions to issues that users might encounter when attempting to log in to Pulse.

IF YOU HAVE NOT BEEN GIVEN ACCESS TO PULSE

If you attempt to log in to Pulse and see the "You have not been given access to Pulse" message, your account has likely been disabled by a Pulse administrator. You should contact the administrator for assistance.

IF YOU HAVE AN INVALID USER NAME OR PASSWORD

If you attempt to log in to Pulse and see the "Invalid User Name or Password" message, you may have entered your email address or password incorrectly. Enter the correct email address and password and try again.

Editing Your Profile

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

When you register for an account, a profile is created for you in the Pulse system. See "Registering for a Pulse Account" on page 6.

Registered Pulse users can edit their account profile by changing their personal information, uploading a profile image, and specifying notification settings.

Editing Profile Settings

Use the following steps to edit profile settings.

HOW TO EDIT YOUR PROFILE

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

2. Open the Settings page using one of these options:

    » Select the **Community** tab. Then click **Edit My Profile**.

    » In the topic toolbar, click ▣.

3. You may be able to update the following information, depending the on the fields that have been included and made editable by the Pulse Administrator.

   » **First Name** The first name of the user.

   » **Last Name** The last name of the user.

   » **Email Address** A valid email address for the user.

   » **Title** A title for the contact, such as a professional or job title.

   » **Department** A department name for the user, such as Engineering or Sales.

   » **Location** A location for the user, such as La Jolla or New York City.

   » **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.

4. Click **Save**.

Changing Your Profile Image

Use the following steps to change your profile image.

HOW TO CHANGE YOUR PROFILE IMAGE

1. In the Settings page, click **Change Image**.

2. In the dialog for your computer's operating system, navigate to the image that you want to upload. This uploads your image and it appears in the Crop Your Image dialog.

3. Adjust the boundaries. Then click **Crop and Save**.

Signing Up for Notifications

Use the following steps to sign up for notifications.

HOW TO SIGN UP FOR NOTIFICATIONS

1. In the Settings page, select the **Notifications** tab.
2. Select any of these notifications.

Notification Types	Description
Send me email	Sends you email when events related to you occur.
Answers	Notifies you when people post answers to your questions.
Comments	Notifies you when people comment on your posts.
Likes	Notifies you when people like your posts.
Follows	Notifies you when people follow you.
Updates	Notifies you when people post updates on your feed.
Mentions	Notifies you when people mention you in their posts.
Asks	Notifies you when people ask you a question.
Invites	Notifies you when people invite you to join Pulse system feeds.
Daily Digest	Send you one daily digest email containing all account-related Pulse activity.
Tasks	Notifies you when users assign you a task.
Messages	Notifies you when people send you are direct message while you are not actively using Pulse.
Skills & Expertise	Notifies you when changes are made to your skills and expertise.
Post Approved	Notifies you if you are using the moderation feature and a new post has been approved by a moderator.
Post Rejected	Notifies you if you are using the moderation feature and a new post has been rejected by a moderator.

Notification Types	Description
Post Pending Moderation	Notifies you if you are using the moderation feature and a new post is waiting for approval by a moderator.

3. Click **Save**.

CHAPTER 2

Posting Content

Users can post content in a variety of ways, such as status updates, questions, articles, and tasks.

This chapter discusses the following:

Posting Status Updates

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

All registered users can post status updates in the feeds associated with a Pulse system. The most common place for an end user to post a status update is in a topic (i.e., the embedded discussion form that appears under each topic in the Flare output). However, you can also post status updates in any group, tag, or user feed that you have access permission to view.

HOW TO POST STATUS UPDATES

1. Log into the Flare output using a registered Pulse account.
2. Navigate to any Flare topic that has been mapped by a content developer to a Pulse feed.
3. In the embedded discussion form below the topic, click **Status**.
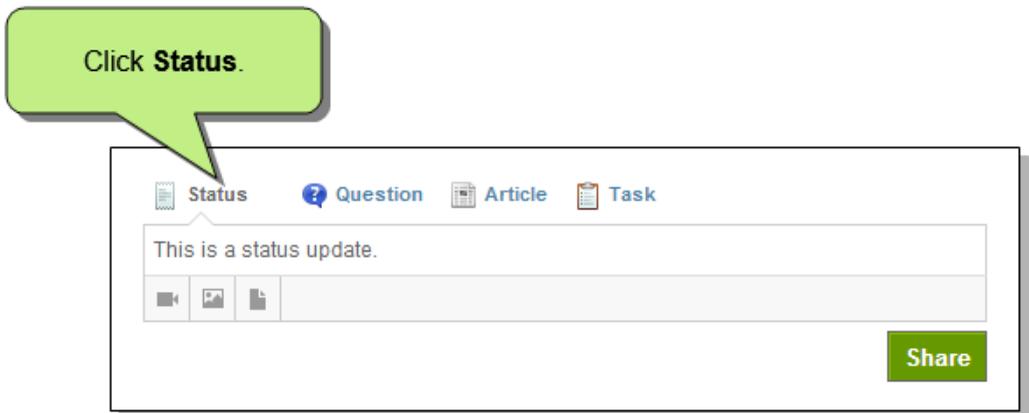
4. (Optional) Do any of the following if you would like to share a video, image, or file with your status update:

   HOW TO SHARE A VIDEO

   Click **Share Video**. Then select a video to upload.
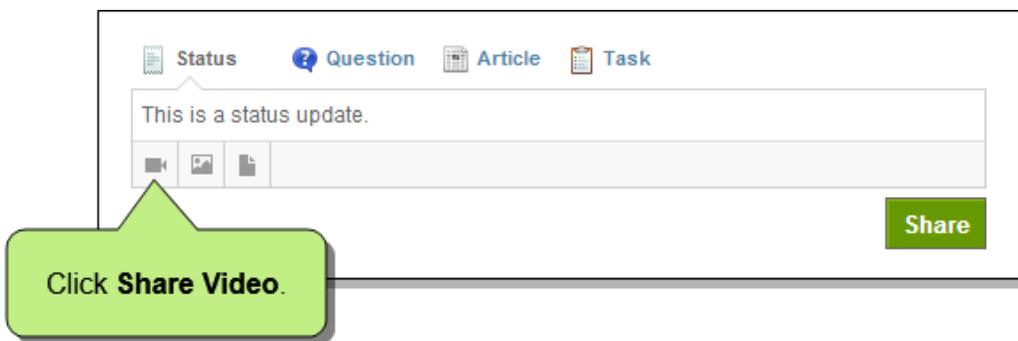
   HOW TO SHARE AN IMAGE

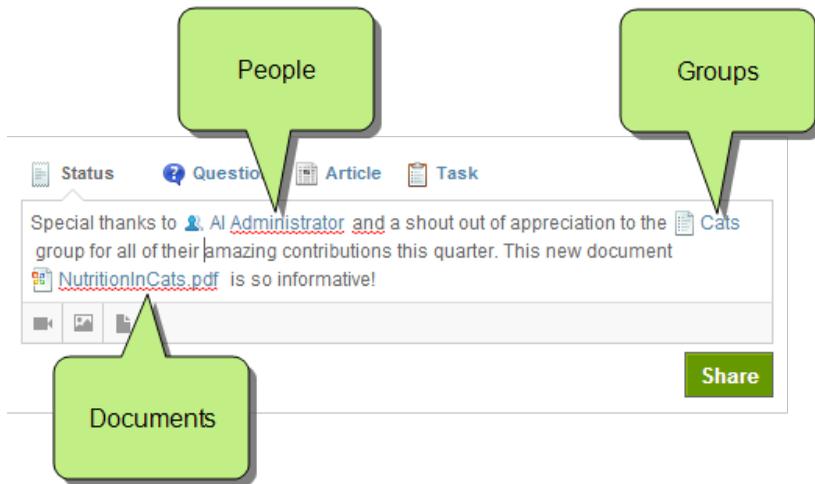   Click **Share Image**. Then select an image to upload.
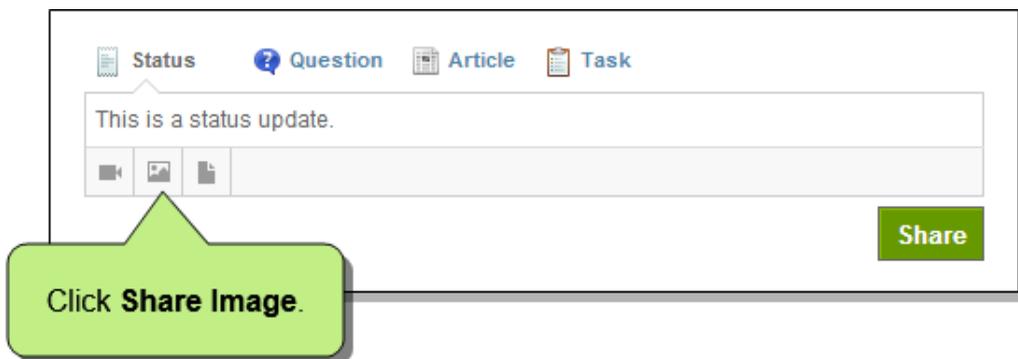
Click **Share File**. Then select **Upload a local file** or **Link to a file** from the context menu.
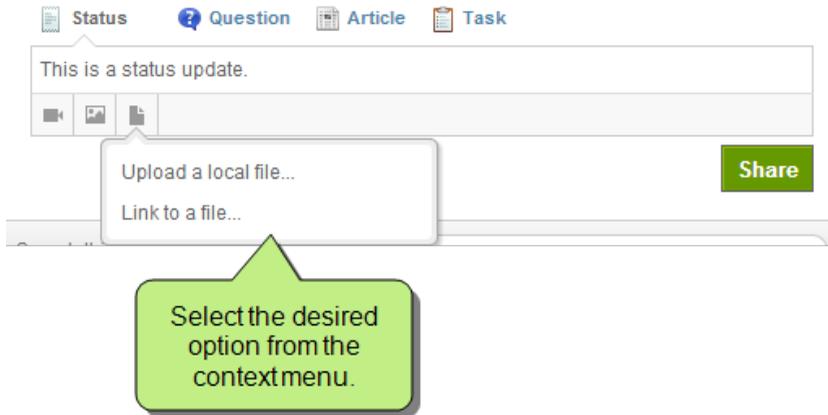
5. Type your status update. You can also enter the @ sign and begin typing to mention a document, people, or groups. See "Mentioning Documents, People, and Groups" on page 45.

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6. When finished typing your update, you can click **Share**.

If you are responsible for moderating the Pulse feeds that are mapped to your Flare community or if you are just interested in participating in a discussion, you have several options for responding to a status update. See "Responding to Status Updates" on page 136.

Posting Questions

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

All registered users can post questions in a Pulse feed and vote on answers. The most common place for end users to ask questions is in a topic feed (i.e., the embedded discussion form that appears under each topic in the Flare output). However, you can also post questions in any group, tag, or user feed that you have access permission to view.

Posting a Question

Use the following steps to post a question.

HOW TO POST A QUESTION

1. Log into the Flare output using a registered Pulse account.
2. Navigate to any Flare topic that has been mapped by a content developer to a Pulse feed.
3. In the embedded discussion form below the topic, click **Question**.

4. In the text field, type your question.

   If you are a member of the Administrators or Employees group, a drop-down list will present any similar questions in the Pulse system.

5. Click **Share**. Your question is posted to the feed for the current topic.
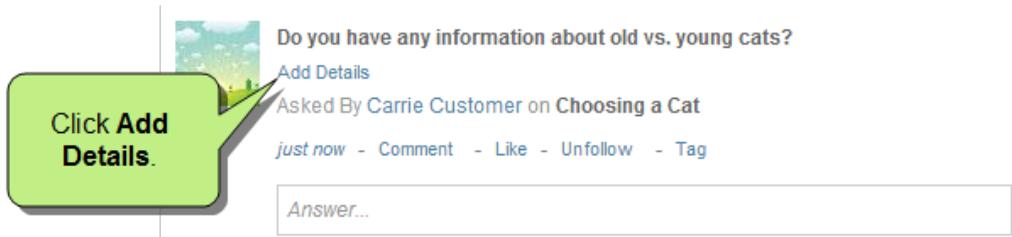
Adding Details to a Question

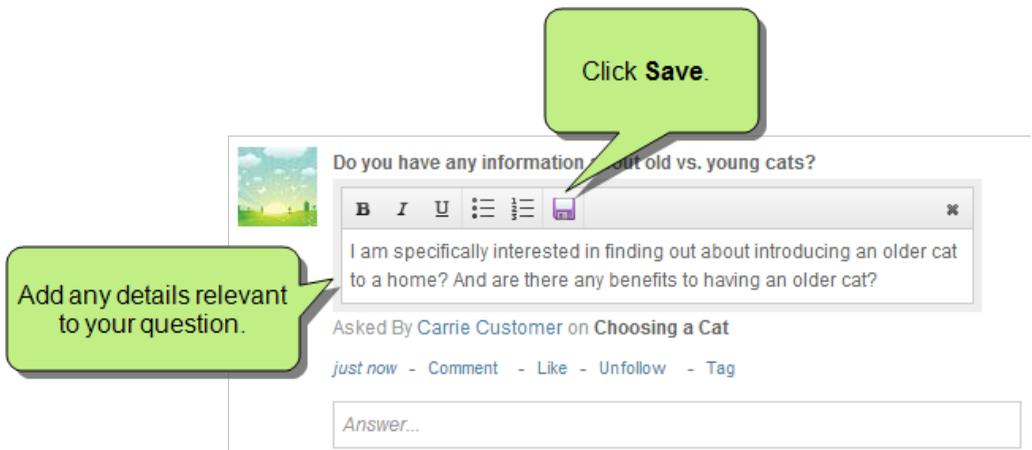Use the following steps to add details to a question.

HOW TO ADD DETAILS TO A QUESTION

After you post a question, you have the option of adding details to the question. This is useful when you want to elaborate on your question.

1. After posting a question, click **Add Details**.

2. In the text editor that appears, add any relevant details. Then click the **Save** button in the toolbar.

This posts the details below the question.

Voting for Answers

Use the following steps to vote for answers.

HOW TO VOTE FOR ANSWERS

Registered users can vote on answers. Over time, the users with the most votes become topic leaders.

1. Log into the Flare output or Pulse dashboard using a registered Pulse account. See "Logging In to Pulse" on page 11.

2. Go to the desired question in any feed.

3. On the left side of an answer, click the **Vote Up** or **Vote Down** button.

The answer with the most votes moves higher in the answer list.

Note: If you are a member of the Administrators or Employees group, votes work with the Find Leaders feature. See "Finding Topic Leaders" on page 125.

If you are responsible for moderating the Pulse feeds that are mapped to your Flare community or if you are just interested in participating in a discussion, you have several options for responding to a question. "Responding to Questions" on page 137.

Posting Articles

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

All registered users can create and post articles in the topic feeds associated with a Pulse system. The most common place for end users to create articles is in a topic feed (i.e., the embedded discussion form that appears under each topic in the Flare output). However, you can also post articles in any group, tag, or user feed that you have access permission to view.

HOW TO POST AN ARTICLE

1. Log into the Flare output using a registered Pulse account.
2. Navigate to any Flare topic that has been mapped by a content developer to a Pulse feed.
3. In the topic feed, click **Article**. A text editor opens.
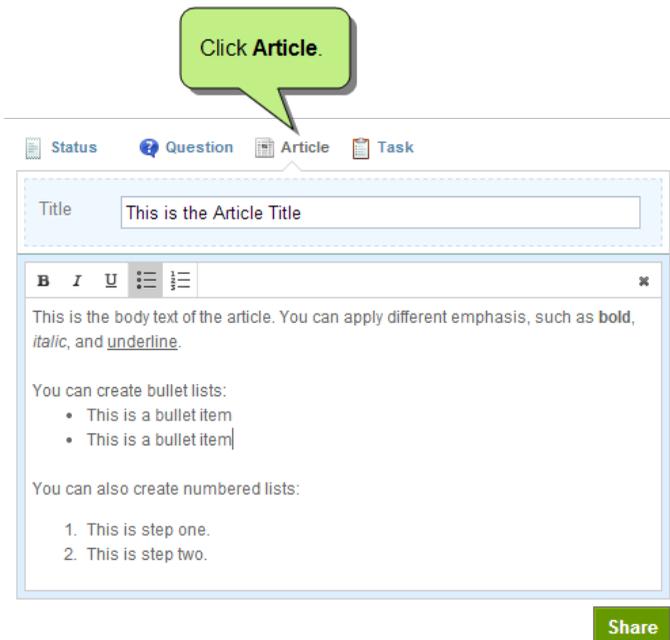
4. In the text editor, do the following:

   » **Title** Type a title for the article in the space provided. You do not have the ability to change the title of the article after you post it.

   » **Body** Type and format the body of your article. You can apply basic formatting for emphasis, such as bold, italics, and underline. You can also create ordered and numbered lists.

5. Click **Share**. The article is posted to the active feed.

If you are responsible for moderating the Pulse feeds that are mapped to your Flare community or if you are just interested in participating in a discussion, you have several options for responding to an article. "Responding to Articles" on page 142.

Assigning Tasks

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

All registered users can create, assign, and manage tasks with Pulse. This gives members of the Customers group the ability to assign a task to any other registered user. It also gives members of the Administrators and Employees groups the ability to assign tasks to each other in any topic, group, tag, and user feed that you have access permission to view.

HOW TO CREATE AND ASSIGN TASKS

1. Log into the Flare output using a registered Pulse account.
2. In the embedded discussion form, click **Task**.

The task pane opens.

3.   In the task pane, complete the following fields. An asterisk (*) denotes a required field:

   » ***Enter a name** Type a name for the task.

   » **Enter a description** Type a description of the task.

   » **Assigned To** Assign the task to one or more Pulse users.

> **Note:** Members of the Administrators and Employees group cannot assign tasks to members of the Customers group.

> **Note:** Members of the Customers group can assign tasks to any registered user from the Flare output. However, only members of the Administrators and Employees group are permitted to manage tasks. See "Tasks" on page 117.

   » **Tags** Create a new tag or assign an existing tag to a post.

   » **Due** Set an optional due date for the task.

   » **Importance** Set the priority for the task.

» **Status** Set the status of the task.

Feeding a Kat

This is where we tell you everything you need to know about feeding cats:

How to Feed a Kitten This is where we tell you everything you need to know about feeding kittens. See **Feeding a Kitten**.

How to Feed an Adult Cat This is where we tell you everything you need to know about feeding adult cats. See **Feeding an Adult Cat**.

How to Feed an Older Cat This is where we tell you everything you need to know about feeding older cats. See **Feeding an Older Cat**.

Enter a task name. This field is required.

Fix misspelling in heading

Click to close the task pane.

Description

"Kat" should be corrected to "Cat" in the heading.

Assigned To

Pulse Administrator x ╋

Tags

cats x ╋

Due

11/15/2013

Importance

Low ▼

Status

Pending ▼

When you've added all the task information, click **Save**.

Save Cancel

4. When you are satisfied with the task, click **Save**. This closes the task pane.

   The system sends a notification to the assigned user(s). When a task is assigned to you, you have the option to accept or decline it.

CHAPTER 3

Responding to Posts

Users can respond to posts in a variety of ways, such as adding comments; following, liking, and tagging posts; and mentioning documents, people, and groups.

This chapter discusses the following:

Adding Comments

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

All registered users can add comments to the posts (i.e., status updates, questions, articles, and tasks) that people add in Pulse. You can add comments to posts that appear in any topic, group, tag, and user feed that you have access permission to view.

HOW TO ADD COMMENTS

1. Log into the Flare output using a registered Pulse account.
2. Locate the post where you want to add a comment. You can add comments to status updates, questions, articles, and tasks.
3. Click the **Comment** link. Then type your comment in the space provided.
4. Click the **Comment** button or press **Enter** to post your response.

Following Posts

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

All registered users have the ability to follow a post. In Pulse, a post is a status update, question, article, or task. You can follow posts that appear in any topic, group, tag, and user feed that you have access permission to view.

HOW TO FOLLOW A POST

1. In the Pulse dashboard or Flare output, navigate to the desired post.

2. Immediately below the post, click **Follow**.
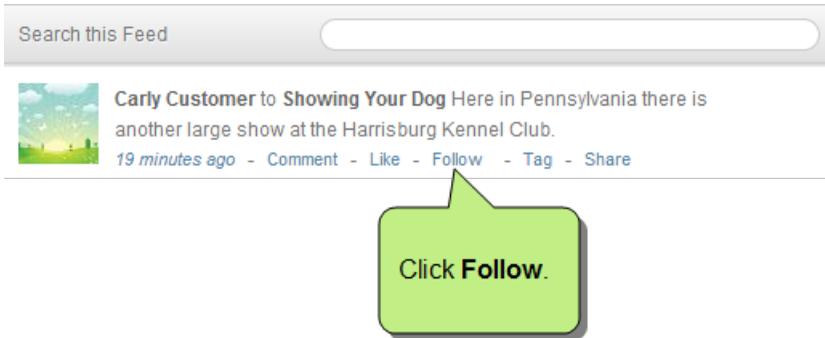
Pulse begins notifying you about any activities relating to that post, such as new comments, likes, follows, tags, and shares. See "Notifications" on page 51.

1. In the Pulse dashboard or Flare output, navigate to the desired post.

2. Immediately below the post you are following, click **Unfollow**.
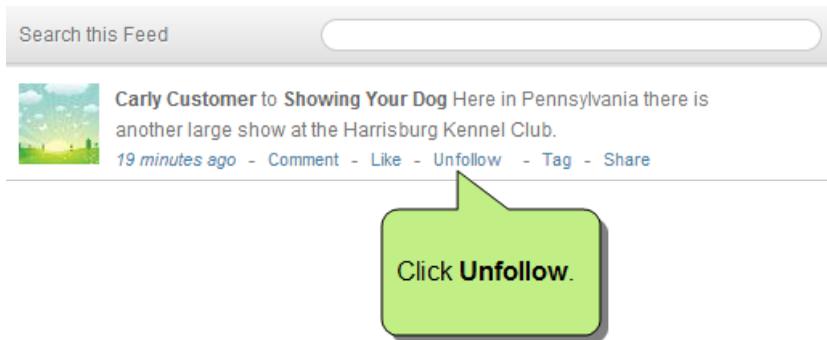
Pulse stops notifying you about any activities relating to that post, such as new comments, likes, follows, tags, and shares. See "Notifications" on page 51.

Note: If you are a member of the Administrators or Employees group, you have other options for following community activity. See "Following Community Activities" on page 126.

Liking and Unliking Activity

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

All registered users can like and unlike posts, just as you do with social media tools. You can like (and subsequently unlike) posts that appear in any topic, group, tag, and user feed that you have access permission to view.

HOW TO LIKE AND UNLIKE A POST

To like a post, click **Like**.



To unlike a post, click **Unlike**.

Tagging Posts

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

Tags are simple keywords and short phrases that describe what a piece of online content is about. In Pulse, tags are used as a means for categorizing Pulse feeds and Flare posts. Because tags can be informally created and applied to a variety of Pulse content (e.g., status updates, questions, articles, tasks, images, and videos), they are a particularly useful to members of the Administrators and Employees groups, as they help moderators better organize and find information. All registered users can add tags to posts that appear in any topic, group, tag, and user feed that you have access permission to view.

E X A M P L E

Let's say you are a member of the Administrators or Employees group and publishing Flare output for a project titled "Pets." You might want to create a different tag for each animal you've written a Flare topic about. For example, you might create tags for: cat, dog, fish, hamster, parrot, and turtle. You can then apply these tags to the embedded discussion form in Pulse.
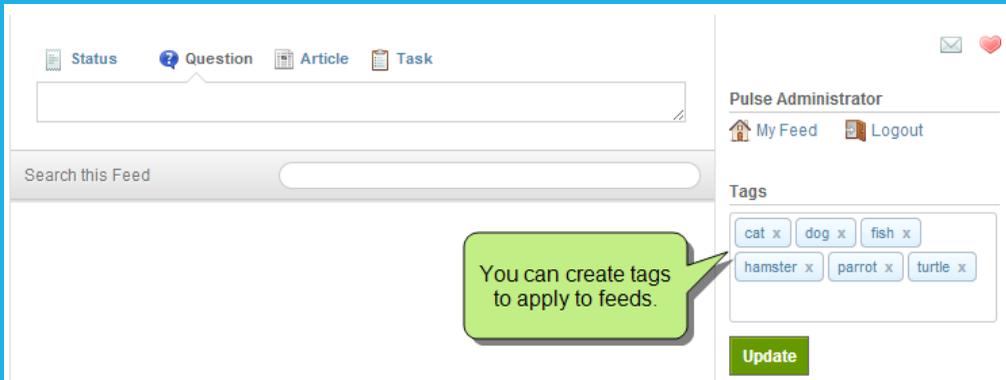
You can create tags to apply to feeds.

Let's say you are a member of the Customers group and when reading another user's post, you decide you want to apply the existing tag (e.g., "dog") to a post. However, you also want to create two new tags. For example, you might create tags for dog breed and dog breed selector.
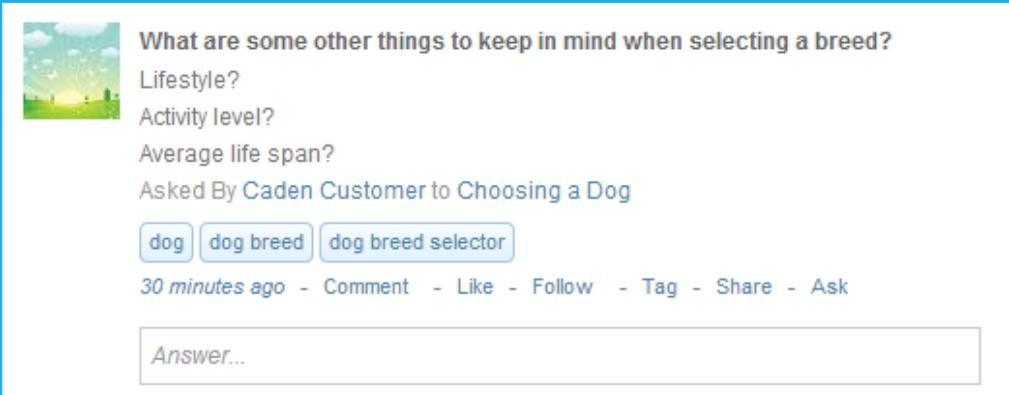
What are some other things to keep in mind when selecting a breed?
Lifestyle?
Activity level?
Average life span?
Asked By Caden Customer to Choosing a Dog

| dog | | dog breed | | dog breed selector |

30 minutes ago - Comment - Like - Follow - Tag - Share - Ask

Answer...

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

2. Locate a post in one of the topic feeds. In this example, we will show you how to add a tag to a status update. However, registered users can add tags to questions, articles, tasks, images, and videos.

3. Immediately below the post, click the **Tag** link.
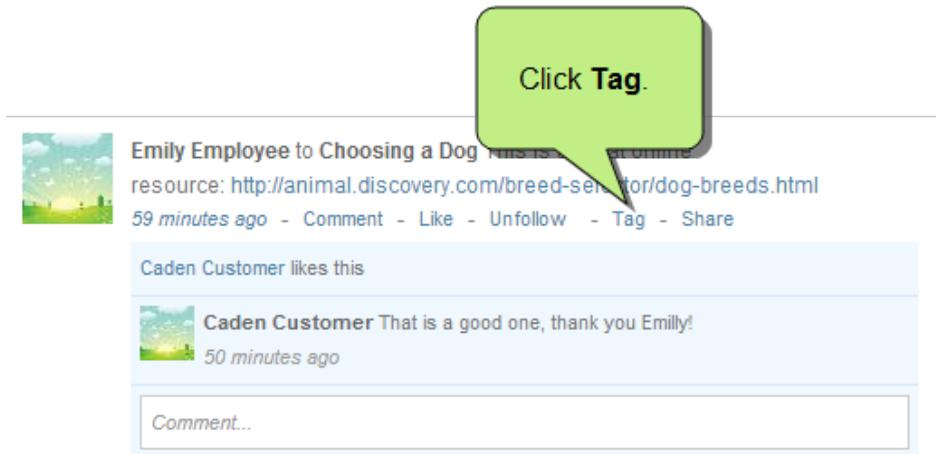
4. In the Edit Tag dialog, you have these options:

   » **Create a New Tag** Type a simple keyword or short phrase. Unlike some tagging utilities, when a single tag consists of more than one word, you do not need to separate the words with an underscore (i.e., if you want to add a tag named "dog breed," simply type `dog breed` instead of `dog_breed`). However, if you are adding more than one tag, you must separate each tag with a comma. Then click **Update**.

   > **E X A M P L E**
   >
   > Let's say you want to add the tags "dog" and "dog breed" to a post. Below shows you how your tags would appear in the Edit Tag dialog before clicking **Update**.
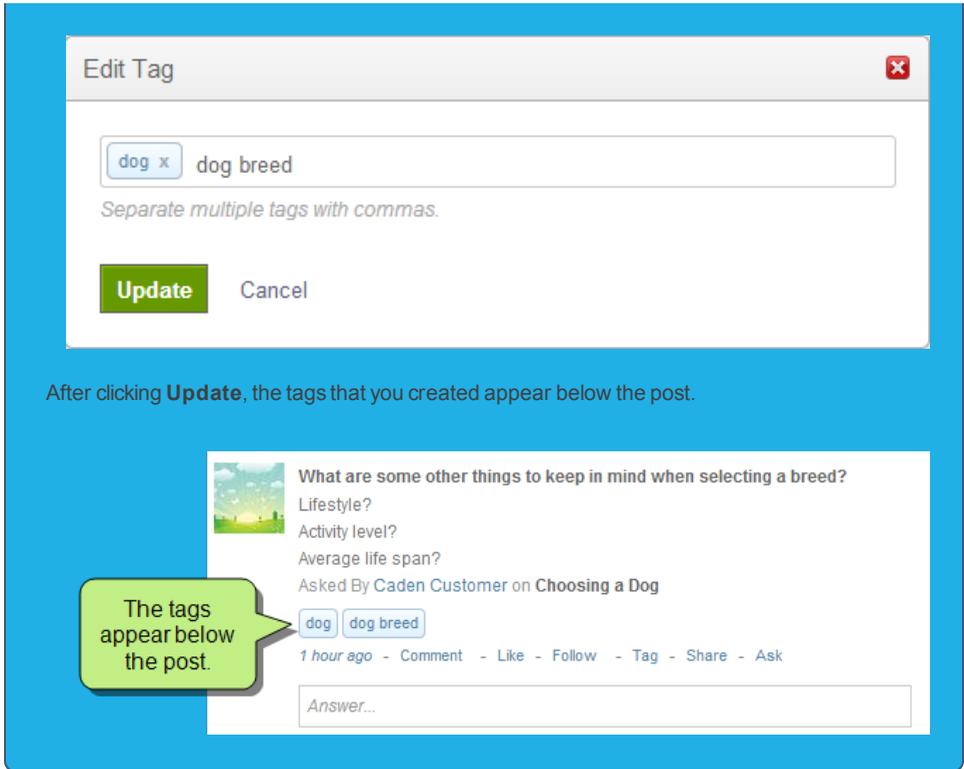
After clicking **Update**, the tags that you created appear below the post.

OR

» **Add an Existing Tag** Begin typing a simple keyword or short phrase. Then select a match from the list that appears, and click **Update**.

E X A M P L E

Let's say you want to apply a tag that already exists to the post. Below shows you how a list of existing tags appears so you can select a match.

Note: If you are a member of the Administrators or Employees groups, you have additional options available to you when working with tags from the Flare content and Pulse dashboard. See "Tagging Content" on page 149.

Note: This feature also works with the Find Topic Leaders feature. See "Finding Topic Leaders" on page 125.

Mentioning Documents, People, and Groups

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

All registered users can use the Mentions feature to mention other registered users by name in status updates, questions, articles, and comments. If users have added documents or groups to Pulse, you can also insert mentions to those items.

Like many popular social media sites, this feature lets you type the @ sign and then start typing the name of a document, person, or group to insert a mention. This is a useful tool for building social relationships. It lets you express interest in others by highlighting a user in conversation. Its also a great way to highlight a document, thank a group for their contribution, or just say congratulations on a job well done.

HOW TO MENTION DOCUMENTS, PEOPLE, AND GROUPS

1. Log into the Flare output or Pulse dashboard using a registered Pulse account. See "Logging In to Pulse" on page 11.

2. Navigate to the desired Pulse feed.

3. Type a status update, question, or comment. When you want to mention another registered user, enter the @ sign and begin typing a name. A drop-down list reveals any matching documents, people, or groups.

4. Begin typing letters that match the user you want to mention. When a match is found, click the match in the drop-down list.

5. Finish typing your content and click **Share**. The content is posted and Pulse sends the people mentioned a notification.
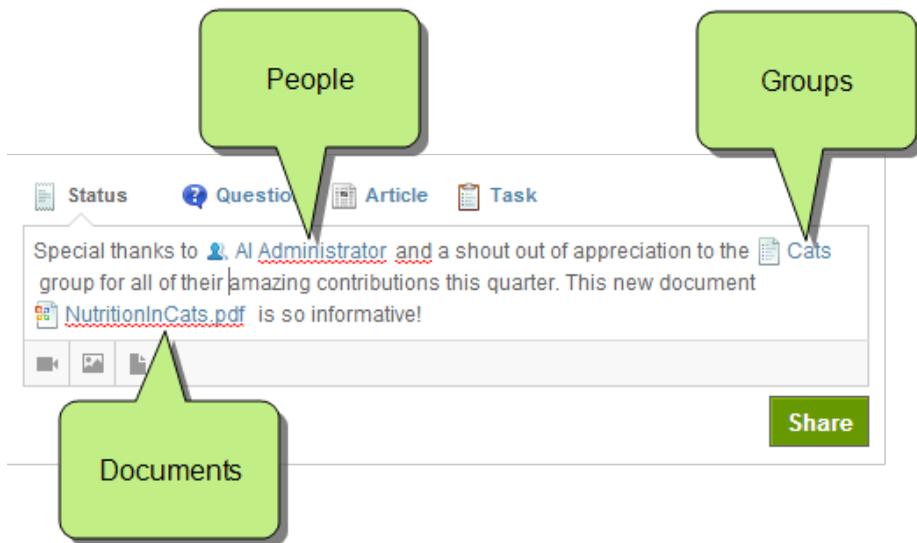
Messaging

Users can take advantage of messaging in a variety of ways, such as general messaging tasks, checking notifications, and sending chat messages.

This chapter discusses the following:

Messaging Tasks

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

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

Sending a New Message

Use the following steps to send a new message.

HOW TO SEND A NEW MESSAGE

1. Log in to the Pulse dashboard.

2. In the dashboard, choose one of these options:

   » From the menu bar, select **Pulse>Messages**.

   » In the top-right corner of the page, click the [button] 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 💬 1 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 💬 1 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 💬 1 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 💬 1 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.

Notifications

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

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

Notification Types

Pulse provides users with these notification types:

» **Comments** Notifies you when people comment on your posts. See "Responding to Status Updates" on page 136.

» **Answers** Notifies you when people post answers to your questions. See "Posting Questions" on page 26 and "Responding to Status Updates" on page 136.

» **Mentions** Notifies you when people mention you in their posts. See "Mentioning Documents, People, and Groups" on page 45.

» **Invites** Notifies you when people invite you to join Pulse system feeds. To learn how to send invites to users, see "Inviting People" on page 130.

» **Tasks** Notifies you when you are assigned a task to complete. See "Assigning Tasks" on page 32.

Checking Notifications

Pulse allows you to check your notifications.

1. Open the Notifications app using one of these options:

   » **Flare Output** In a web browser, navigate to the Flare output. Then log in to the Pulse system (see "Logging In to Pulse" on page 11). Click the **Community** tab in the Flare output. Under the Your Apps list, click **Notifications**.
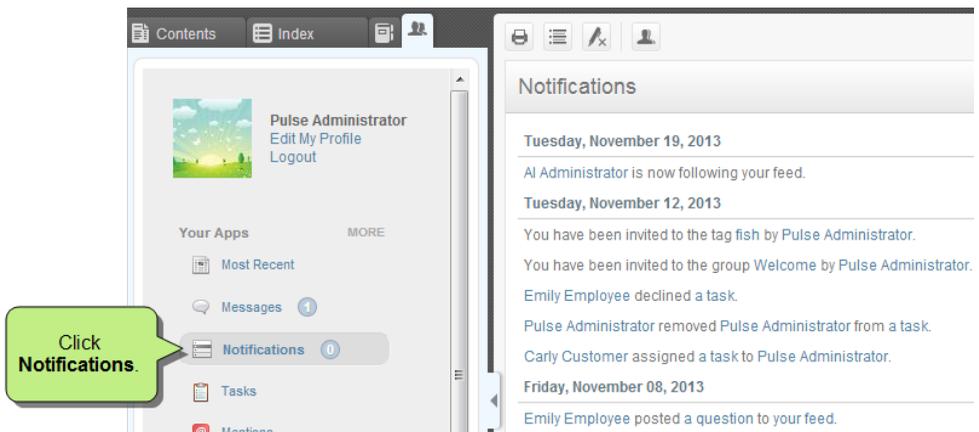
> **Note:** The Your Apps list in the only available to members of the Administrators and Employees groups. It is not available to members of the Customers group.

> **Note:** You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

» **Pulse Dashboard** Log in to the Pulse dashboard (see "Logging In to Pulse" on page 11). Then click ⊟ in the upper-right corner of the dashboard. In the drop-down message, click **View All Notifications**.

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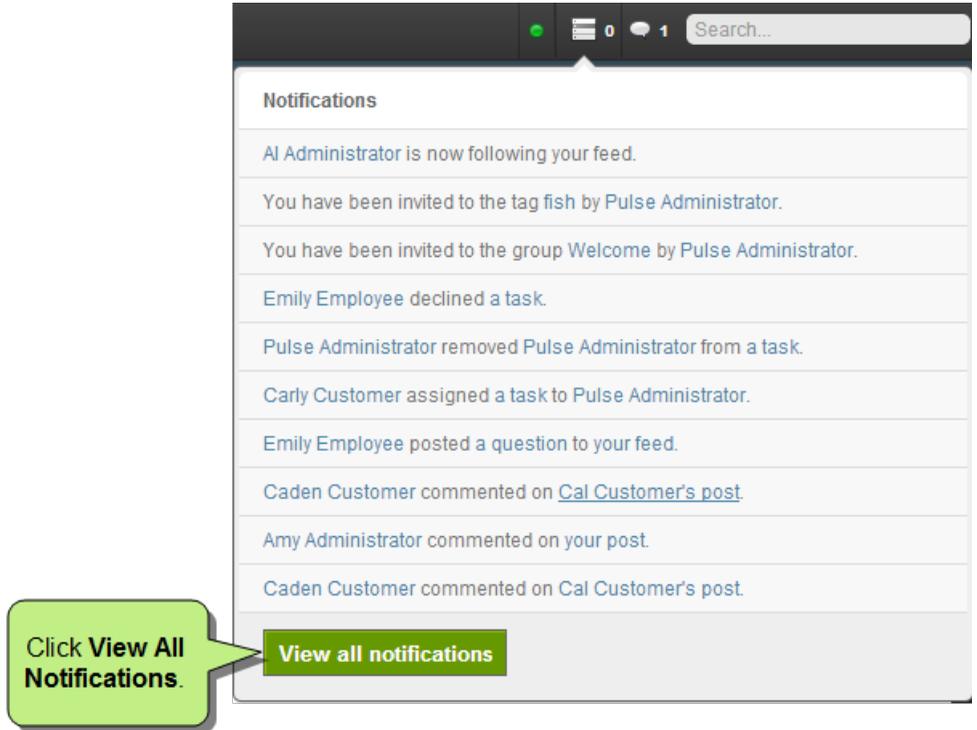
2. In the Notifications page, all of your notifications are listed. You have these options:

» 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. See "Editing Your Profile" on page 16.

Sending Chat Messages

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

Chat features are available to all registered Pulse users. You can initiate a chat if you are a member of the Customers group. Members of the Administrators and Employees group have additional chat options. See "Contacting Registered Users" on page 65.

HOW TO INITIATE A CHAT SESSION

1. Log in to Pulse.
2. Hover the mouse cursor over a username.
3. When the popup menu appears, click the **Chat** button.
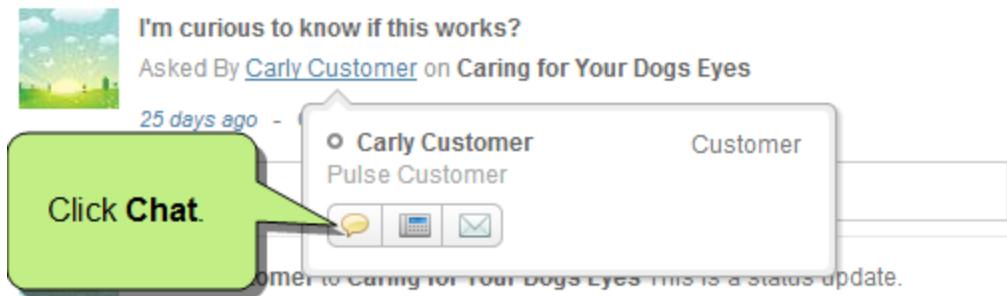
This reveals the Conversation with Customer Name window, where you can enter your message and attach a document. If the user is not online, Pulse will notify the recipient.

Moderating Pulse

If you are a member of the Administrators or Employees group, there are two user interfaces for moderating the activity in your Pulse system. You can use the Flare output or the Pulse dashboard to moderate activity in a variety of ways.

This chapter discusses the following:

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Moderating Posts

By default, this feature is initially available only to **Administrators** and **Employees**, because they have status as moderators. However, when configuring the privacy settings for the community (i.e., system), you can assign moderation rights to other groups as well.

New Pulse communities will initially be set for moderation (i.e., requiring approval of new posts). If you have a community that does not have this option set, you can select it in the Pulse dashboard. Moderators will receive an email notification when there is a new post pending approval. You can then click the link to that topic and accept or reject the post.

MODERATION ACTIONS BY USER GROUP

The moderation tasks that can be performed depend on the user group.

Moderation Actions	General Public	Customer	Employee	Administrator
Post Comments (must have approval)	✖	✔	✖	✖
Post Comments (without approval	✖	✖	✔	✔
See Pending Comments	✖	✖	✔	✔
See Rejected Comments	✖	✖	✔	✔
Approve Comments	✖	✖	✔	✔
Reject Comments	✖	✖	✖	✔
Delete Comments	✖	✖	✖	✔

1. Log in to the Pulse dashboard.

2. Select **Systems>Find Systems**. Then click the desired system link to configure it. The system page appears.
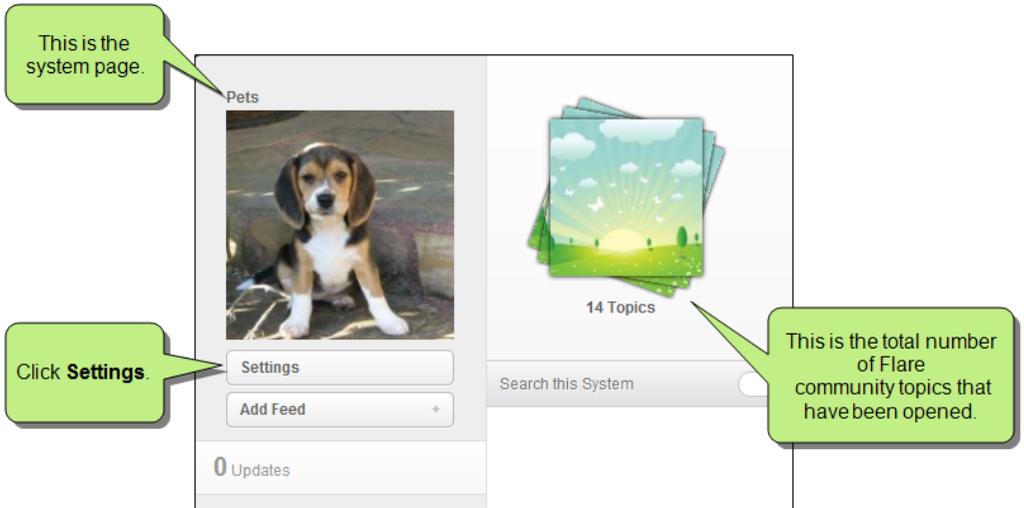
3. In the system page, click **Settings**.The system's Feed Settings page opens.

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4. On the **Basic** tab, select the **Moderation** check box.

5. Click **Save**.

6. When a user posts to a topic, you will receive an email notification stating that the post is pending approval. Click the topic link in the email. You should see an icon indicating that the post has a pending status.
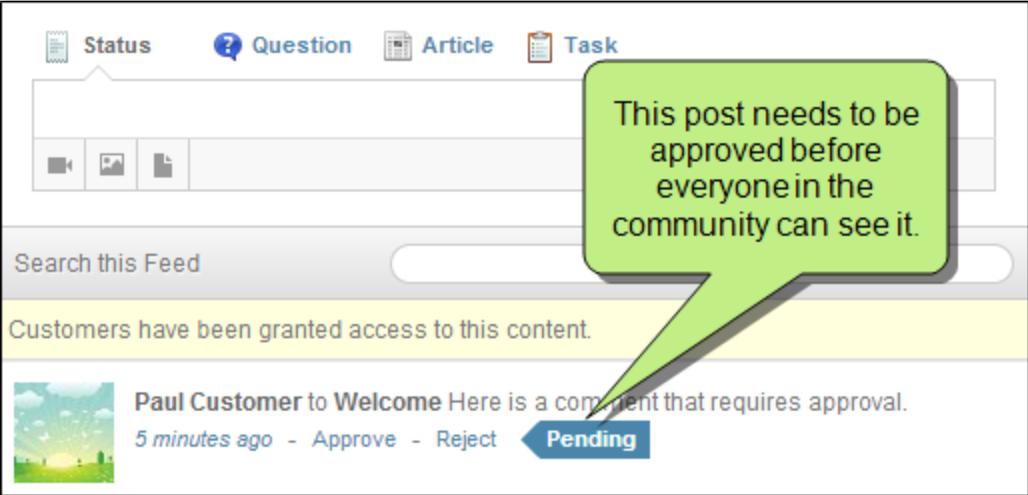
7. Depending on what you want to do, click **Approve** or **Reject**.
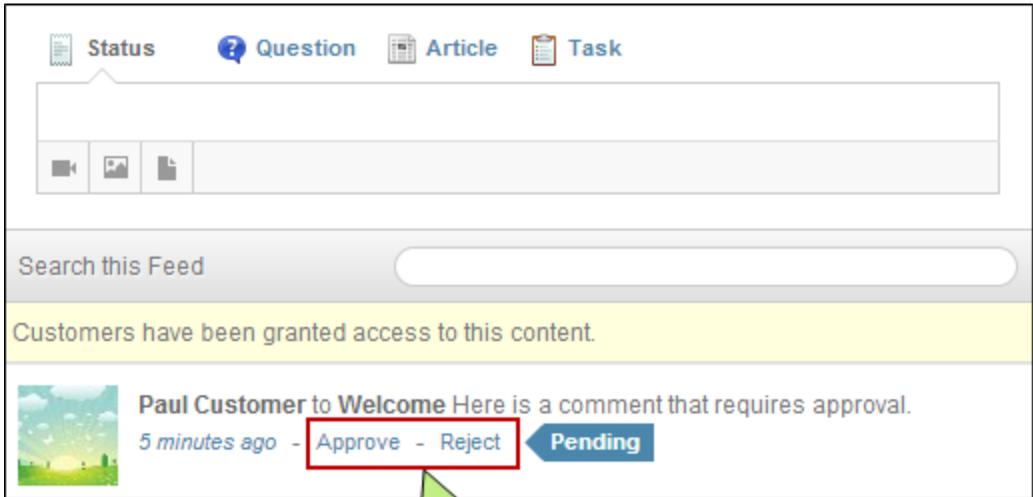
Click **Approve** or **Reject**, depending on the action you want to take.

8. If you select "Reject," choose a reason from the drop-down that displays, and click **Reject Activity**. (Administrators can configure rejection reasons, adding as many as you need.)

Note: All moderators will receive email notifications when new posts require approval. However, any moderator can update his or her email notifications to not receive those types of emails (e.g., one administrator might be in charge of post approvals, whereas a second administrator might be responsible for other tasks and doesn't need to be informed of new posts). See "How to Sign Up for Notifications" on page 19.

Note: If you opt to moderate all of your posts, there is no need to subscribe to them as well since you will automatically receive emails with the moderation feature. However, if you decide not to use the moderation feature, it is recommended that you subscribe to all of your topics globally so that you are informed whenever someone posts to that topic. See "Subscribing to Communities and Topics" on page 145.

Keep in mind that, with the global subscription route, email notifications are tied to each community, whereas the moderation route sends email notifications to all moderators, regardless of the community where the post was made. For example, let's say you've got two documentation groups (Group A and Group B) producing different Flare outputs. Suppose someone in Group A creates a Pulse community associated with his Flare output and publishes it. In addition, that person chooses the option to moderate posts for that community. Whenever an end user posts a comment to that Flare output, all moderators in both Group A and Group B will receive a notification about that post. That might be fine for the moderators in Group A, but the moderators in Group B may not want to see those emails, because they have nothing to do with any of their outputs. There are two options to avoid this kind of situation. First, you can install Pulse on two different servers—one for Group A and the other for Group B. Second, you can make sure all communities are using the global subscription method instead of moderation; so you'd be giving up moderation, but you'd be able to work off the same server and you'd only receive email notifications for the communities to which you've subscribed.

Contacting Registered Users

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

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

Using a Pulse Chat

Pulse offers members of the Administrators and Employees group a chat feature where you can initiate a conversation with any registered user. You can also send chat messages using the same method available to members of the Customers group. See "Sending Chat Messages" on page 56.

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 [icon]. This opens a chat window in the lower, right-hand corner of your browser.
5. Enter a message text in the space provided. Then press **Enter** to send the conversation.

> **Note:** If the user is not online, your conversation will appear in their Pulse inbox on their Messages page.

6. Click the paperclip icon to add an attachment.

Sending a Message

Registered users can create and send messages to other registered users.

HOW TO SEND A MESSAGE

1. Log in to the Pulse dashboard.

2. In the dashboard, choose one of these options:

    » From the menu bar, select **Pulse>Messages**.

    » In the top-right corner of the page, click the button.

3. In the Messages page, click **New Message**.

4. In the New Message dialog, do the following:

    » **To** Start typing the name of a registered user and then select the appropriate match from the list.

    » **Message** Type the body of your message in the space provided.

    » **Add Attachment** Click to add a file attachment.

5. Click **Send**.

Replying to a Message

Use the following steps to reply to a message.

HOW TO REPLY TO A MESSAGE

1. Log in to the Pulse dashboard.

2. In the dashboard, choose one of these options:

   » From the menu bar, select **Pulse>Messages**.

   » In the top-right corner of the page, click the button.

3. In the Messages page, click one of your messages. This opens the message or conversation.

4. In the space provided, type your reply.

5. If you want to add an attachment, click **Add Attachment**. Then select the file to attach.

6. Click **Reply**.

Contacting Users by Email

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

HOW TO CONTACT USERS BY EMAIL

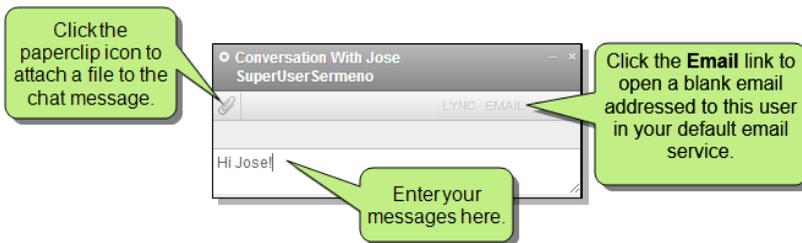1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.
2. Select **People>Find People**.
3. In the Find People page, click the desired user.
4. Click the email link.
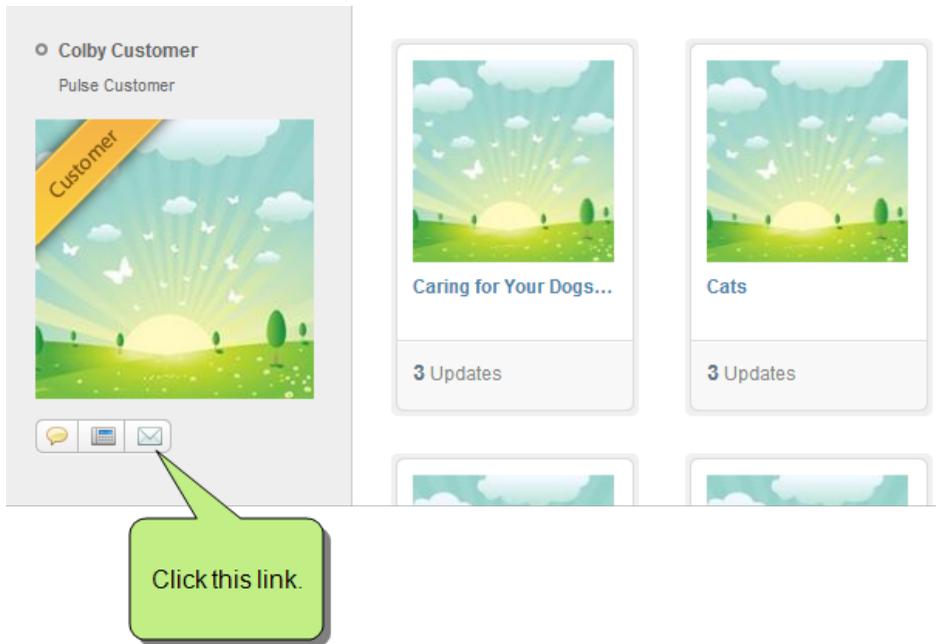
If your computer is properly configured, this opens your email client. If you do not know how to configure an email client on your computer, please see your IT or Email Administrator.

Customizing the Your Apps Menu

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

If you are a member of the Administrators or Employees group, you have the ability to customize the Your Apps menu commands that appear in the left navigation pane of your user feed. In addition, a number of the commands that are available in the Your Apps menu are also available in the left navigation area of the group, tag, and topic feeds in Pulse.

About the Your Apps Menu

In order to view the Your Apps menu, you must be logged into Pulse from either the Pulse dashboard or the Flare output. In the Flare output, you can access the Your Apps menu by selecting the **Community** tab. In the Pulse dashboard, select the **Pulse>Home** menu command to view the Your Apps menu in your user feed. You can also navigate to different group, tag, and topic feeds and use the commands that are available in the left navigation pane.

The Your Apps menu in the Flare output:

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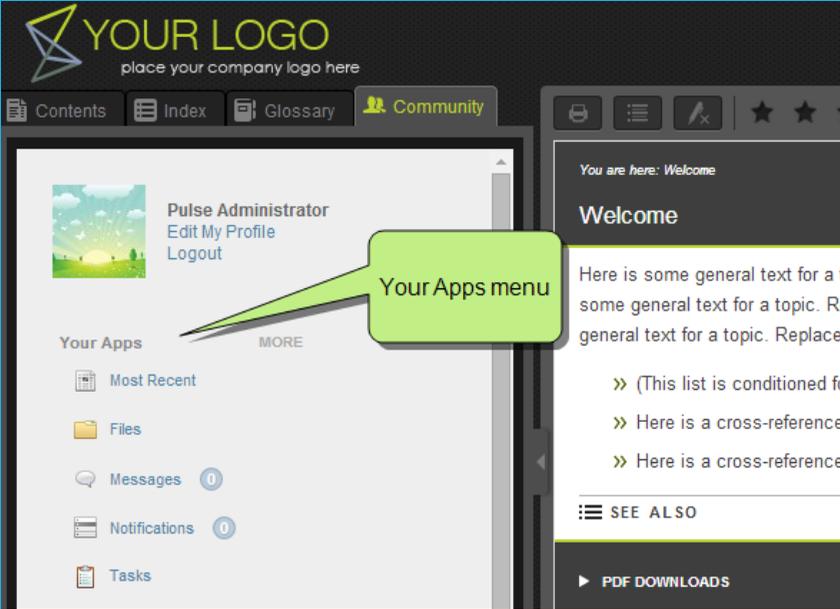
The Your Apps menu in your user feed on the Pulse dashboard:
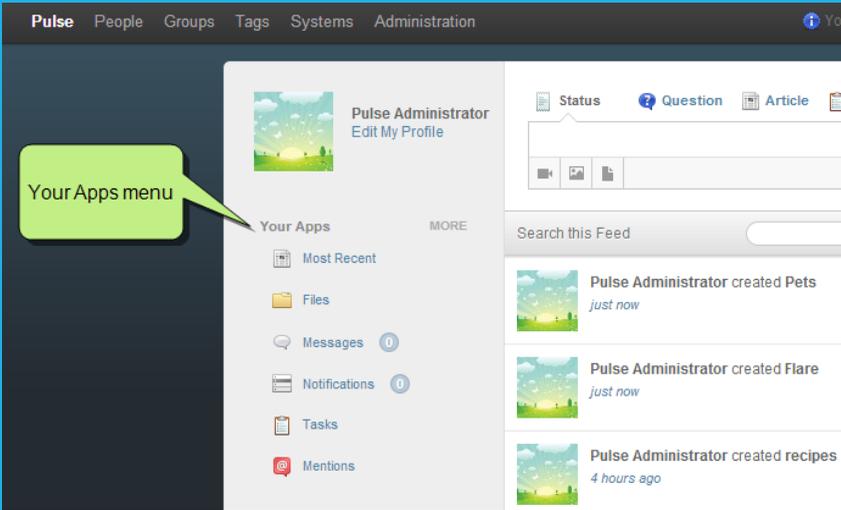
The table below details the apps that are available in the Your Apps menu on your user feed (or in the left navigation pane of the group, tag, or topic feeds in Pulse). An asterisk (*) by the App Name denotes that an app is available by default on the Your Apps menu of your user feed.

App Name	Description	Group Feed	Tag Feed	Topic Feed	User Feed	Learn More
Articles	Read and review the articles posted to Pulse (see "Posting Articles" on page 30). **Note:** For an article to appear as an update when using the Articles app on your user feed, you must be following the group, tag, topic, or user feed where the article was posted. See "Following Community Activities" on page 126.	✓	✓	✓	✓	"Articles " on page 78
Files	Upload files to share with others, and download files. See "Files" on page 81.	✓	✗	✗	✓	"Files" on page 81
Mentions*	Shows all of the times you were mentioned in a conversation. See "Mentioning Documents, People, and Groups" on page 45.	✗	✗	✗	✓	"Mentions" on page 101
Messages*	View and send messages to other users.	✗	✗	✗	✓	"Messages" on page 102
Moderation	View content that is pending, awaiting moderation.	✗	✗	✗	✓	"Moderation" on page 105
Most Recent*	View and moderate the recent Pulse community activity.	✗	✗	✗	✓	"Most Recent" on page 107

App Name	Description	Group Feed	Tag Feed	Topic Feed	User Feed	Learn More
Notifications*	Shows all of the notifications you've received from the Pulse system. See "Notifications" on page 51. **Note:** For a notification to appear as an update when using the Notifications app on your user feed, you must be the recipient of a notification or following the group, tag, topic, or user feed where the corresponding notification activity was posted. See "Following Community Activities" on page 126.	✖	✖	✖	✔	"Notifications" on page 108
Profile	Open the Settings to update your profile. See "Editing Your Profile" on page 16.	✖	✖	✖	✔	"Profile" on page 110
Questions	Read and respond to the questions added to Pulse. See "Posting Questions" on page 26. **Note:** For a question to appear as an update when using the Questions app on your user feed, you must be following the group, tag, topic, or user feed where the question was posted. See "Following Community Activities" on page 126.	✔	✔	✔	✔	"Questions" on page 110
Read it Later	Bookmark posts to add it to your read it later list. See "Bookmarking a Post to Read it Later" on page 134.	✖	✖	✖	✔	"Read It Later" on page 113

App Name	Description	Group Feed	Tag Feed	Topic Feed	User Feed	Learn More
Tasks*	Assign and manage tasks. See "Assigning Tasks" on page 32.	✓	✓	✓	✓	"Tasks" on page 117
Top News	Shows you the most active posts in Pulse. **Note:** For an activity to appear as an update when using the Top News app on your user feed, you must be following the group, tag, topic, or user feed where the activity was posted. See "Following Community Activities" on page 126.	✗	✗	✗	✓	"Top News" on page 123
Statuses	Shows the latest updates posted to the selected feed.	✓	✓	✓	✓	"Statuses" on page 115

Customizing Menu Commands

Use the following steps to customize menu commands on the Your Apps menu.

HOW TO CUSTOMIZE THE MENU COMMANDS ON THE YOUR APPS MENU

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Depending on where you logged in, select the appropriate option:

   » **Flare Output** If you logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.
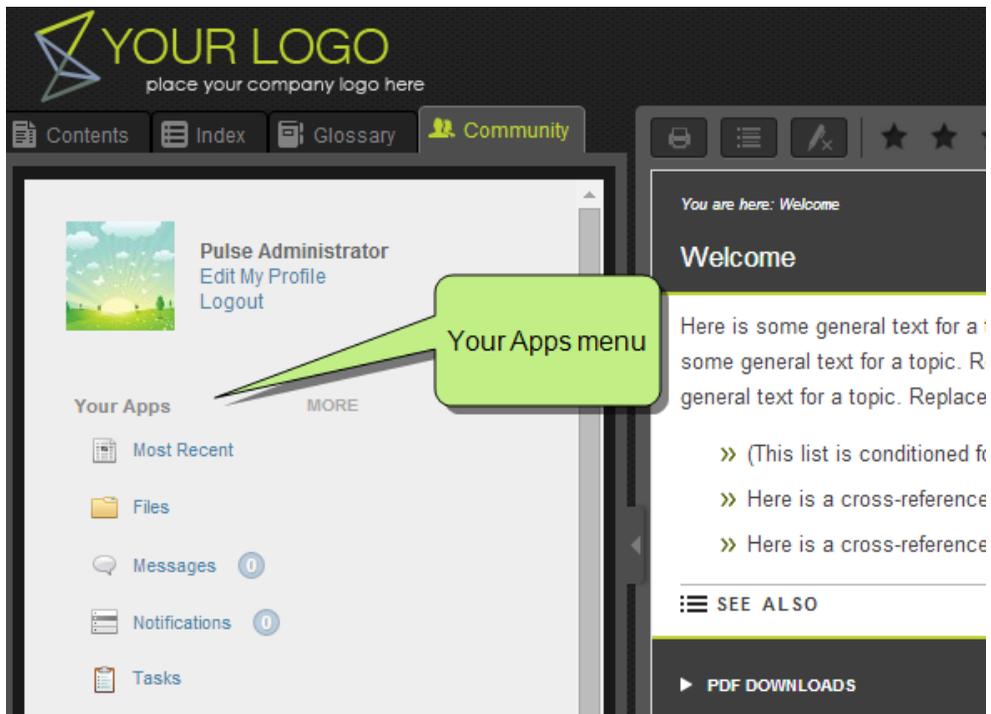
» **Dashboard** If you logged into the Pulse dashboard, choose **Pulse>Home** to view the Your Apps menu in your user feed.
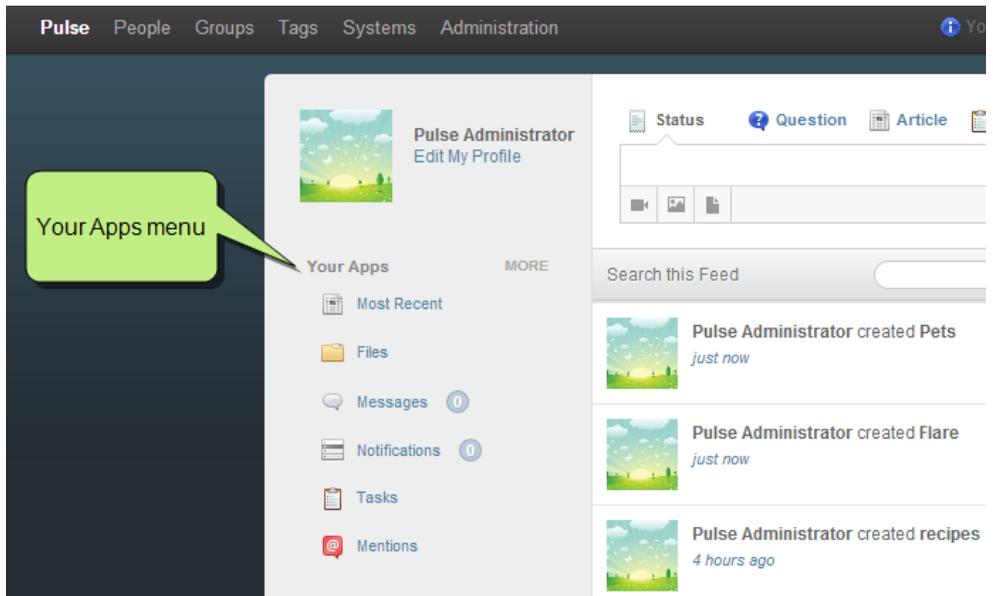
3. Click the **MORE** link. This opens the Customize Your Apps dialog.

4. Select the apps that you want to display in your user feed from the menu. A blue background indicates the app is selected. This will not have an effect on the availability of menu commands on the group, tag, or topic feeds.
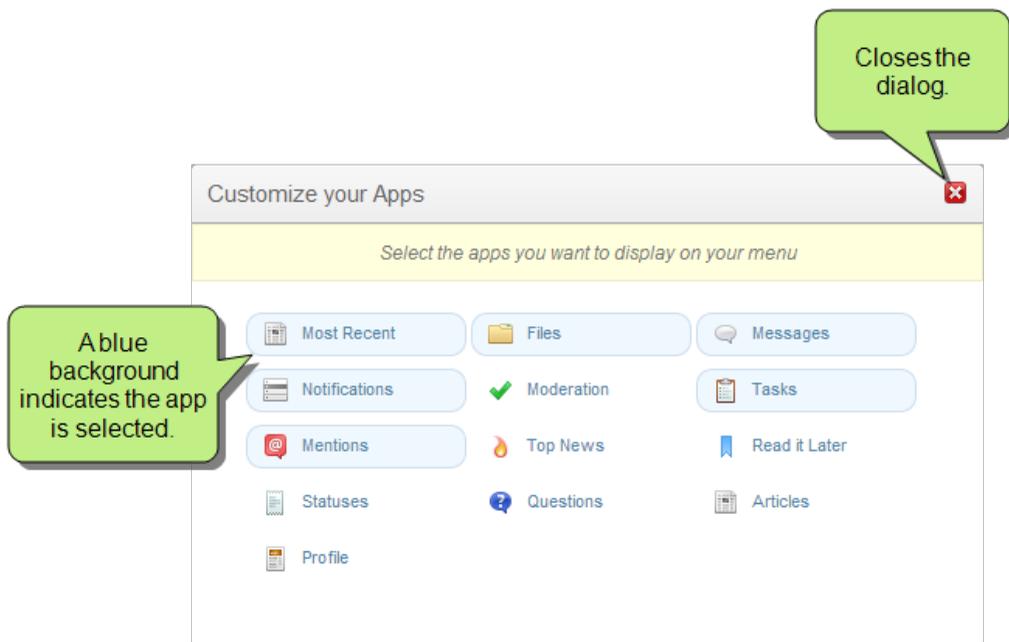
5. Close the Customize Your Apps dialog. The Your Apps menu is updated with your selections.

Articles

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

The Articles app gives you the ability to read the articles that have been posted to a specific group, tag, topic, or user feed. In addition, it gives you the ability to edit the articles you've posted to a feed. If you post an article, you have the ability to delete it. If you are a member of the Administrators group, you can also delete the articles that others post. To learn how to post an article, see "Posting Articles" on page 30.

HOW TO OPEN THE ARTICLES APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

      OR

   » If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Articles**.

   This reveals any articles that have been posted to the selected group, tag, topic, or user feed.

   > **Note:** You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

You can edit the body text of an article, but not the title. In addition, you can only edit the articles that you post.

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Articles**.
3. In the Articles page under the desired post, click **Edit**. This link is only available if you posted the original article.

4. In the article page, you may edit only the body of the article. You cannot modify article titles.

HOW TO DELETE AN ARTICLE

1. Navigate to the desired group, tag, topic, or user feed.

2. In the Your Apps menu (or left navigation pane of a group, tag, or topic feed), click **Articles**.

3. In the Articles page under the desired post, click the [×] link. Remember these rules for deleting articles:

   » If you are a member of the Administrators group, you may delete any article.

   » If you are a member of the Employees group, you can only delete the articles you create.

4. In the Confirm Delete Activity box, click **Delete Activity**.

Files

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

There are two ways to share files in Pulse:

» **Files App** The Files app works like a file sharing service within Pulse. Administrators and Employees can use the Files app to share files in either their personal user feeds or in a group feeds.

» **Files in Status Updates** You can upload files when you post a status update. Anyone viewing the status can click on the file to download it.

The following activities are supported in the Files app.

1. Log in with an Administrator or Employee account.

2. Do one of the following:

   » **Access Your Own User Feed** This lets you manage folders and upload files on your own feed. Others can then go to your page to download files.

   On the **Community** tab of the Flare output, or on your **Home** page in the Pulse dashboard, click the **Files** app. If the Files app is not displayed, you can add it by clicking the **MORE** link.
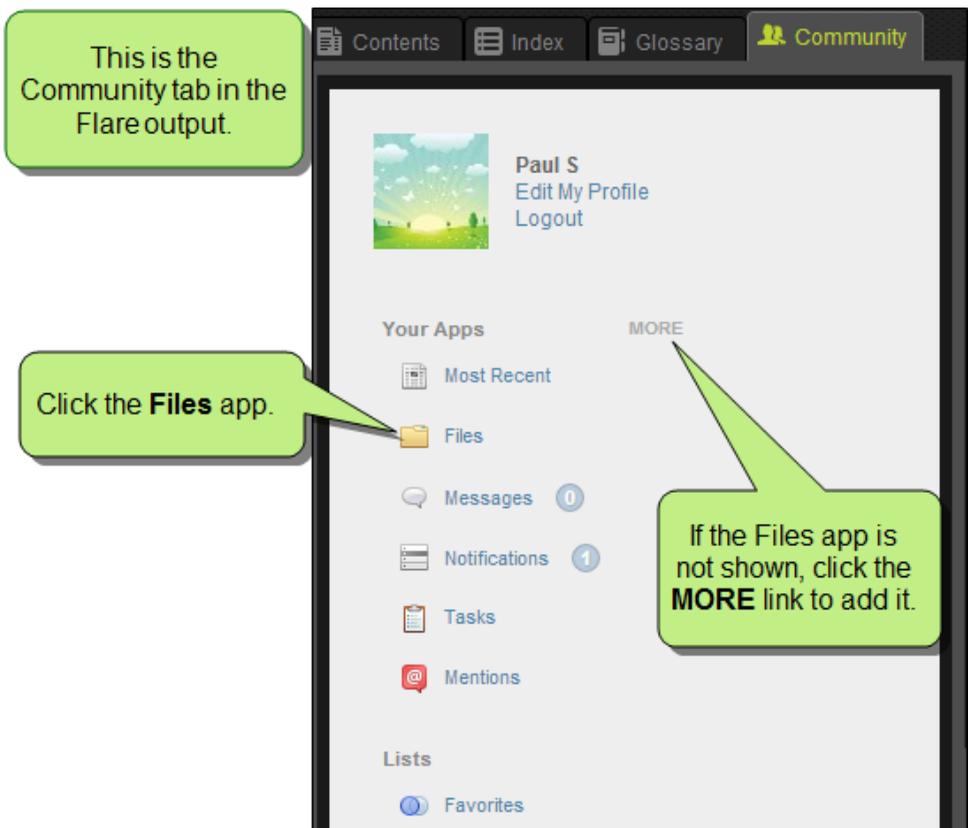
This shows the apps on the Home page in the Pulse Dashboard.

Paul S
Edit My Profile

Your Apps   MORE

Most Recent

Click the **Files** app.

Files

Messages   0
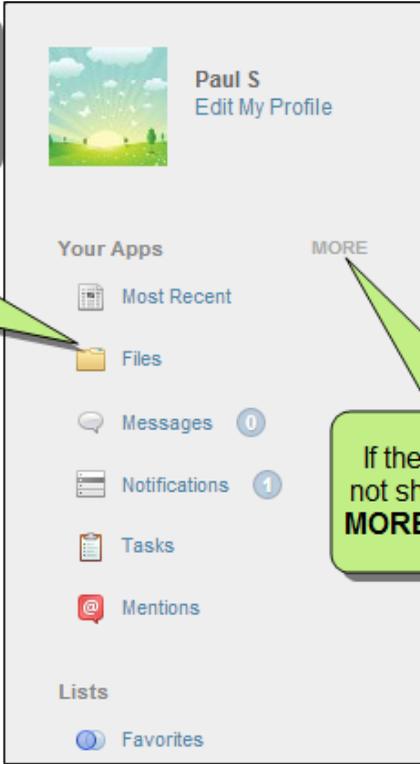
If the Files app is not shown, click the **MORE** link to add it.

Notifications   1

Tasks

Mentions

Lists

Favorites

» **Access Another User's Feed** This lets you view and download files another user has uploaded.

In the Pulse dashboard, use the **People** menu to locate and select a particular user's feed. Then on the left side of that user's page, click the **Files** app.
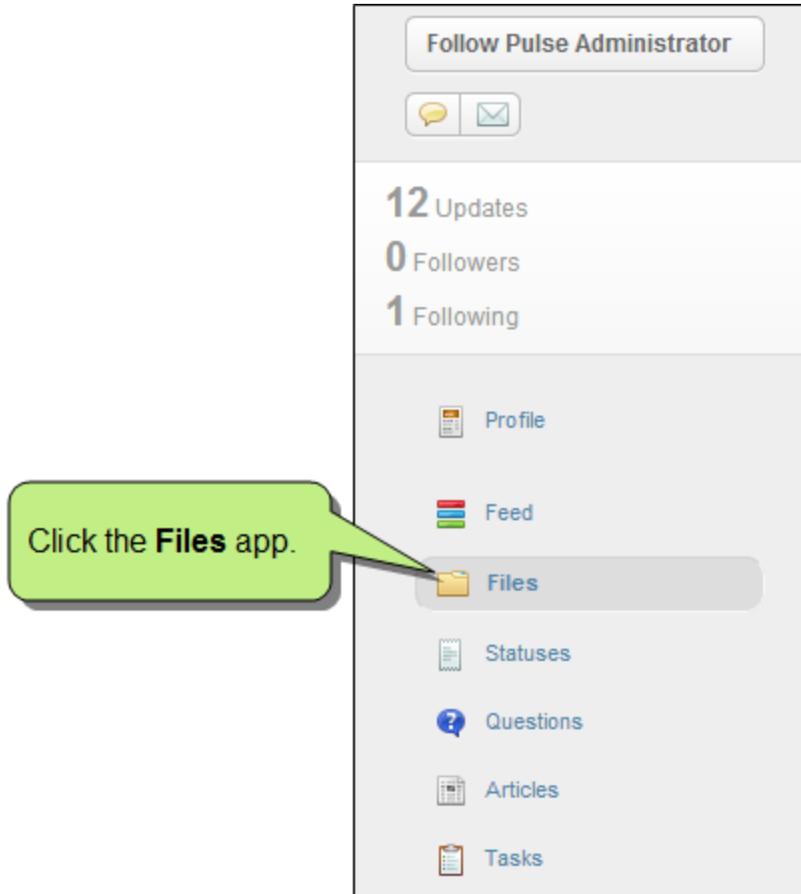
Click the **Files** app.

» **Access a Group Feed** This lets you open the page for a group and then upload or download files within it.

In the Pulse Dashboard, use the **Groups** menu to locate and select a group. Then on the left side of the group page, click the **Files** app.

This shows a group page in the Pulse Dashboard.
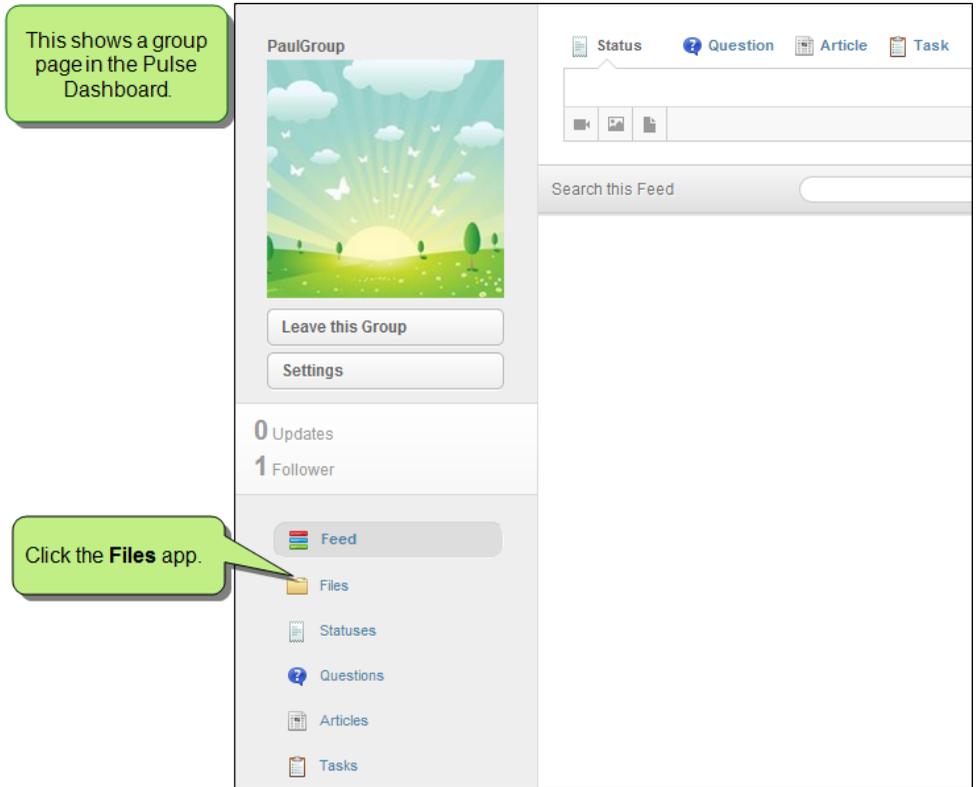
Click the **Files** app.

1. Access the Files app where you want to create a folder. See "How to Access the Files App" on page 82.

2. In the upper-right corner of the Files page, click **New Folder**.

Click **New Folder**.

Files	Download Folder	Upload Files	New Folder
Files /			

Name	Author	Size	Created
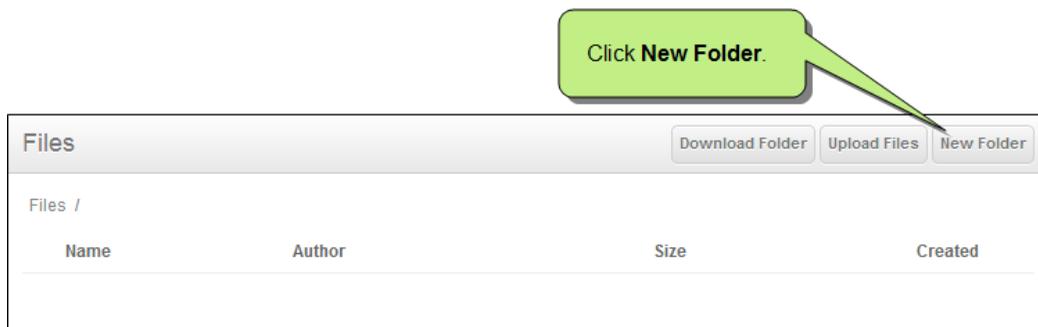
3. In the dialog that opens, type a name for the folder and click **Create Folder**.

4. After the folder is added, you can click it and add other folders or files in it.

1. Access the Files app where you want to upload files. See "How to Access the Files App" on page 82.
2. If you want to place the file in a subfolder, click that folder to open it.
3. In the upper-right corner of the Files page, click **Upload Files**.

Click **Upload Files**.

Files			Download Folder	Upload Files	New Folder
Files /					
Name	**Author**	**Size**			**Created**
📁 My Folder	-	-			*in a few seconds* ☐
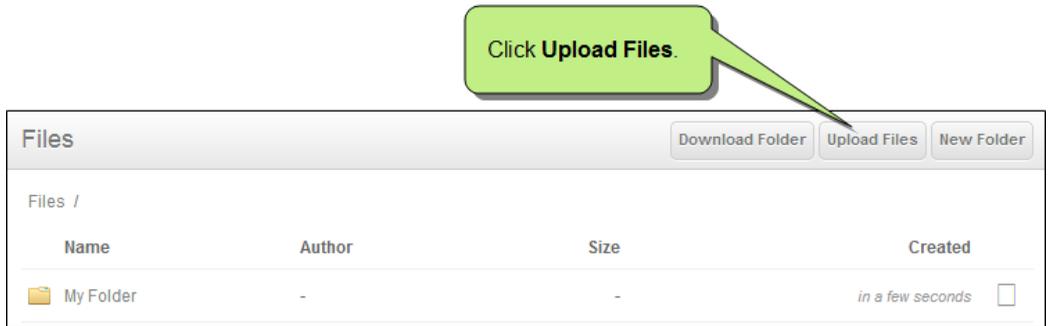
4. In the dialog that opens, click **Choose Files**.
5. In the dialog that opens, find and select the file(s) that you want to upload, and click **Open**.
6. Click **Upload Files**.

HOW TO DOWNLOAD A FOLDER AND ALL OF ITS FILES

1. Access the Files app where you want to download a folder and its files. See "How to Access the Files App" on page 82.

2. If you stay at the root folder of the Files app all of the subfolders and files will be included in the download. If necessary, you can open a subfolder to download all files within it.

In this example, the root folder of the Files app is open.

Therefore, all of the subfolders and files will be included in the download.

Files			Download Folder	Upload Files	New Folder
Files /					
Name	Author	Size			Created
My Folder	-	-			16 minutes ago
My PDF File.pdf	Paul S	79 KB			a few seconds ago
My Word Document.docx	Paul S	11 KB			in a few seconds

If you want to download only the files within a subfolder, you would first need to click that folder to open it.

Files			Download Folder	Upload Files	New Folder
Files /					
Name	Author	Size			Created
My Folder	-	-			16 minutes ago
My PDF File.pdf	Paul S	79 KB			a few seconds ago
My Word Document.docx	Paul S	11 KB			in a few seconds

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3. In the upper-right corner of the Files page, click **Download Folder**.

All of the subfolders and files are compressed into a ZIP file and downloaded.

1. Access the Files app where you want to download a file. See "How to Access the Files App" on page 82.
2. If necessary, open a subfolder to see the files within it.
3. Do one of the following:

   » Click the small box at the right end of the file row, and from the context menu click **Download**.

Files			Download Folder	Upload Files	New Folder
Files /					
Name	**Author**	**Size**	**Created**		
📁 My Folder	-	-	*40 minutes ago*	☐	
📄 My PDF File.pdf	Paul S	79 KB	*23 minutes ago*	☐	
📄 My Word Document.docx	Paul S	11 KB	*23 minutes ago*	☐	

   First, click the small box.

   🔍 Open
   ⬇ Download
   📑 Rename
   ✂ Cut
   ⛔ Delete

   Then click **Download**.
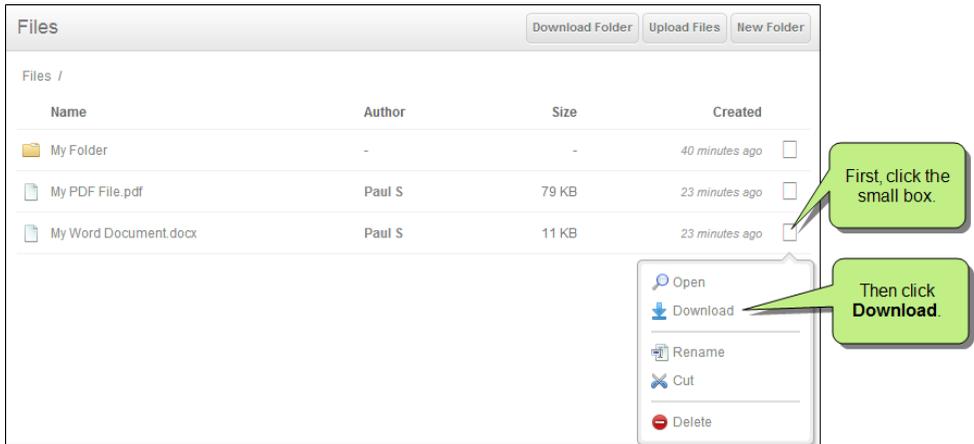
   OR

   » Click the name of the file. A new page opens, just for that file. In the upper-right corner of the page, click **Download**.

   Click **Download**.

My PDF File.pdf	Version 1 (Latest) ▾	⇄ Share Link ⬆ Upload New Version ⬇ Download ⛔ Delete ❌
		Paul S to Files
		28 minutes ago - Comment - Like - Unfollow
		Comment...

1. Access the Files app where you want to rename a folder or file. See "How to Access the Files App" on page 82.

2. If necessary, open a subfolder to see the files within it.

3. Click the small box at the right end of the folder or file row, and from the context menu click **Rename**.

Files				
		Download Folder	Upload Files	New Folder

Files /

Name	Author	Size	Created	
My Folder	-	-	an hour ago	☐
My PDF File.pdf	Paul S	79 KB	an hour ago	☐
My Word Document.docx	Paul S	11 KB	an hour ago	☐

First, click the small box.

Context menu:
- Open
- Download
- Rename
- Cut
- Delete

Then click **Rename**.
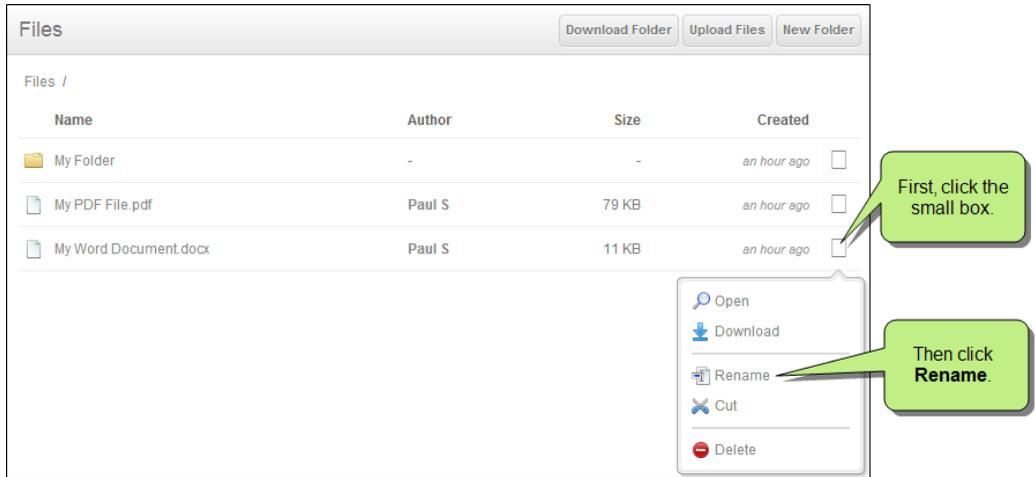
4. In the dialog that opens, edit the name of the folder or file, and click **Save**.

1. Access the Files app where you want to delete a folder or file. See "How to Access the Files App" on page 82.

2. If necessary, open a subfolder to see the files within it.

3. Click the small box at the right end of the folder or file row, and from the context menu click **Delete**.

4. In the dialog that opens, click **Delete Folder and Contents** (if deleting a folder) or **Delete Activity** (if deleting an individual file).

HOW TO MOVE A FOLDER AND FILE

These steps let you cut and paste a folder or file from one folder to another.

1. Access the Files app where you want to move a folder or file. See "How to Access the Files App" on page 82.

2. If necessary, open a subfolder to see the files within it.

3. Click the small box at the right end of the folder or file row, and from the context menu click **Cut**.

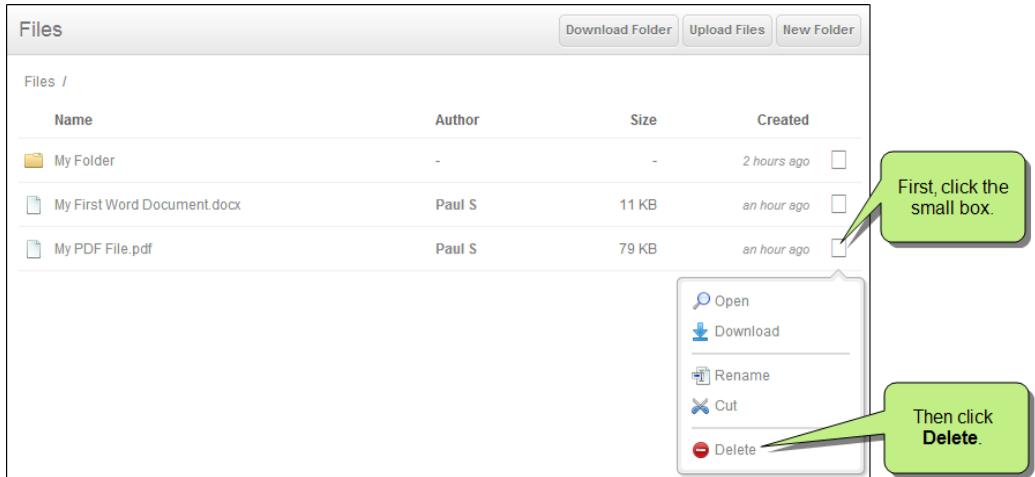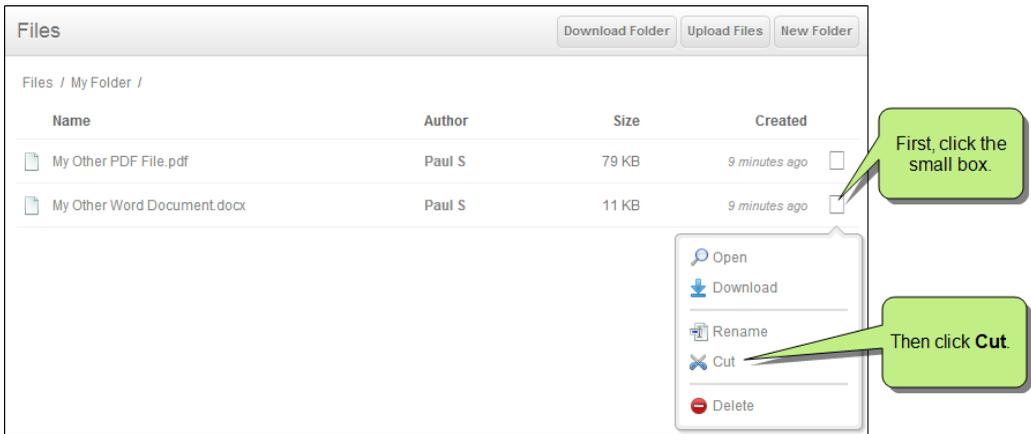4. Navigate to the folder where you want to move the other folder or file. You can use the breadcrumb links in the upper-left corner of the page to navigate.

5. After you navigate to another folder, at the top of the page click the **Paste** button.

HOW TO SET SECURITY ACCESS FOR A FOLDER

1. Access the Files app where you want to set security access for a folder that you've created. See "How to Access the Files App" on page 82.

2. Click the small box at the right end of the folder row, and from the context menu click **Security**.
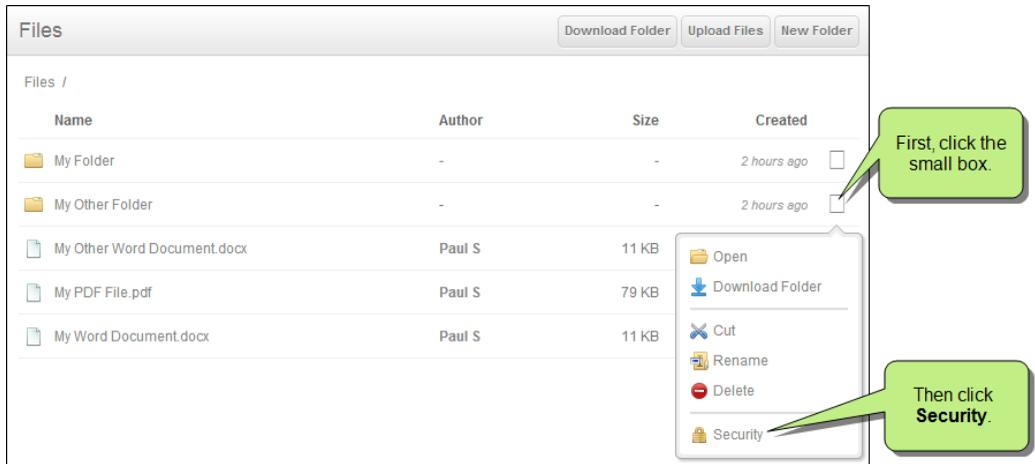
The page that opens displays which users or groups have access to the folder.

3. You can click **Add a user or group** to add others to the security access.
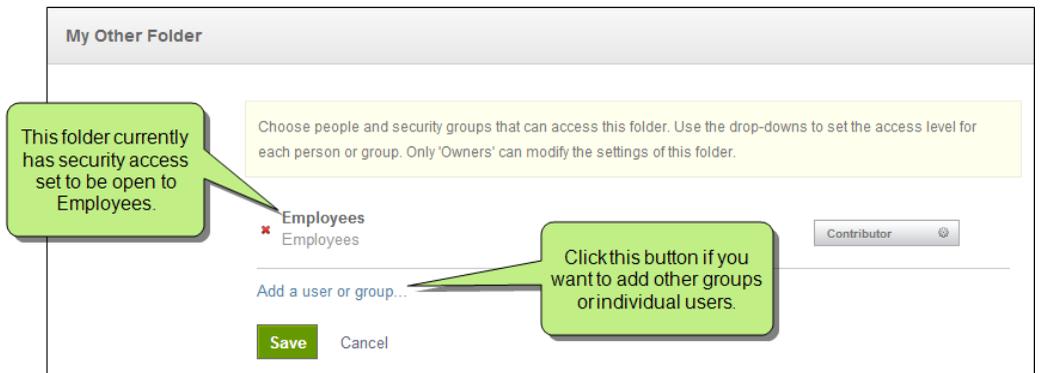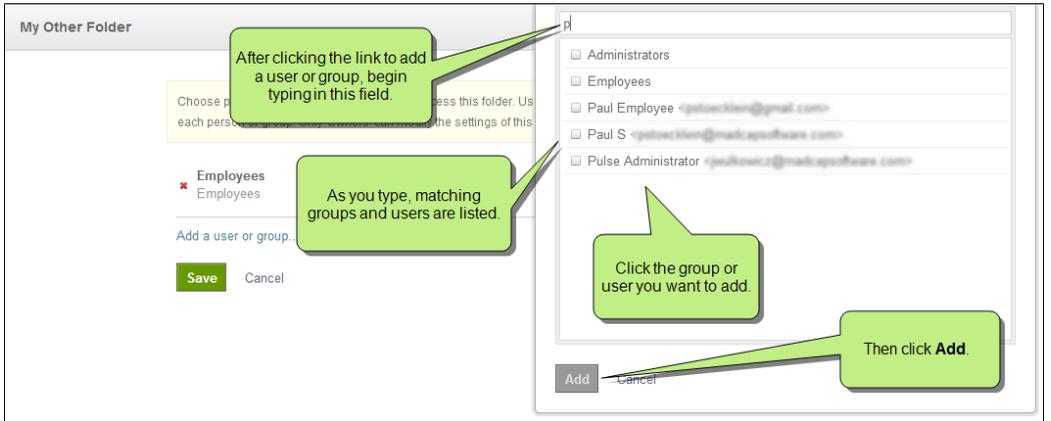
4. You can also click the drop-down to the right to adjust the security permissions level of each user or group.
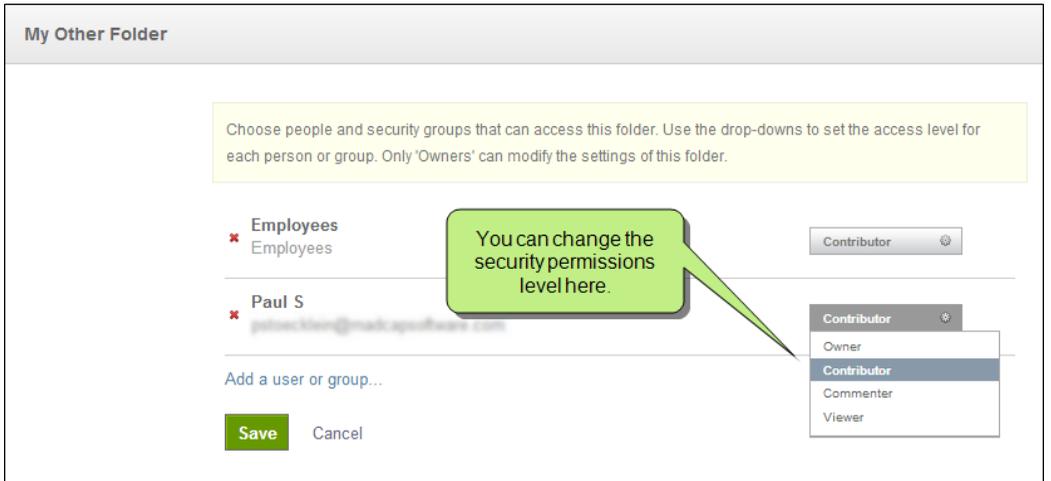
Following are the different security permission levels. These can also be configured on a system.

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.

These steps let you create a link to a file you've uploaded. You can then copy and send that link to someone. This allows the file to be opened by anyone who has access to your server, whether they are registered in your Pulse community or not.

1. Access the Files app where you want to share a file link. See "How to Access the Files App" on page 82.

2. If necessary, open a subfolder to see the files within it.

3. Click the name of the file. A new page opens, just for that file.

4. At the top of the page, click **Share Link**.

Click **Share Link**.

| My Other PDF File.pdf | Version 1 (Latest) ▾ | | ⇄ Share Link | ⬆ Upload New Version | ⬇ Download | ⊖ Delete | ✖ |

Paul S to My Folder

18 minutes ago - Comment - Like - Unfollow

Comment...

5. In the dialog that opens, click **Get Link**. A URL is generated.

6. Copy the link that is generated and send it to an individual. When you are finished with the dialog, either click the small red x in the upper-right corner or click Share Link again.

> ⚠ **Warning:** Do not click "Delete Link"; that button will erase the generated link, and once you do that, the other person will not be able to access the file.

HOW TO UPLOAD A NEW VERSION OF A FILE

You can use the following steps if you've already uploaded a file but want to replace it with a newer version.

1. Access the Files app where you want to upload a newer version of a file. See "How to Access the Files App" on page 82.

2. If necessary, open a subfolder to see the files within it.

3. Click the name of the file. A new page opens, just for that file.

4. At the top of the page, click **Upload New Version**.

5. In the dialog that opens, select the new version of the file and click **Open**.

You can use the following steps to see the activity for a file that has been uploaded.

1. Access the Files app where you want to upload a newer version of a file. See "How to Access the Files App" on page 82.

2. If necessary, open a subfolder to see the files within it.

3. Click the name of the file. A new page opens, just for that file.

4. At the top-left of the page, click the drop-down and select **Activity Log**.
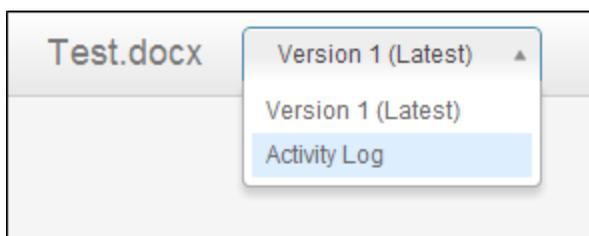
> **Note:** On the General Settings page of the Pulse dashboard, Administrators can control whether file sharing is available for users only or for groups as well. At the bottom of this page is a Files drop-down that lets you make a selection.

Mentions

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

The Mentions app is available in your user feed. It gives you the ability to see all the times you were mentioned in post by other Pulse users. To learn how to mention a user by name in a post, see "Using Mentions" on page 158 and "Mentioning Documents, People, and Groups" on page 45.

HOW TO OPEN THE MENTIONS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

    » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

    OR

    » If you are logged into the Pulse dashboard, navigate to your user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu, click **Mentions**.

    This reveals a list of all the posts where your user name was mentioned.

    Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

Messages

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

The Messages app is available in your user feed and gives you the ability to exchange messages with other Pulse users. It also gives you the ability to hide your messages.

HOW TO OPEN THE MESSAGES APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

   OR

   » If you are logged into the Pulse dashboard, navigate to your user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu, click **Messages**.

   This reveals a list of your Pulse messages.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

1. Navigate to your user feed.

2. In the Your Apps menu, click **Messages**.

3. In the Messages page, click **New Message**.

4. In the Messages dialog, do the following:

   » **To** Start typing the name of a registered user and then select the appropriate match from the list.

   » **Message** Type the body of your message in the space provided.

   » **Add Attachment** Click to add a file attachment.

5. When finished, click **Send**. The message is sent to the user and a copy of the conversation thread appears in the Messages page.

1. Navigate to your user feed.

2. In the Your Apps menu, click **Messages**. Your messages appear in the list.

3. In the Messages page, click one of the messages in the list to open the conversation thread.

4. (Optional) If you want to reply to a message, choose from these options:

   » Type a reply in the space provided.

   AND/OR

   » Click the paperclip to add an attachment.

5. Click **Reply**.

HOW TO HIDE A CONVERSATION

1. Navigate to your user feed.

2. In the Your Apps menu, click **Messages**. Your messages appear in the list.

3. In the Messages page, click the **Hide Conversation** link (the **x**) to remove it from the page.
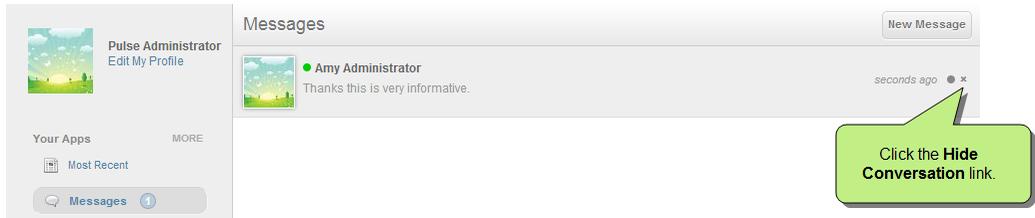
Moderation

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

The Moderation app is available in your user feed and gives you the ability to view posts that are pending moderation. You can then approve or reject any of those posts. In addition, you can use the Moderation app to view posts that have previously been rejected. See "Moderating Posts" on page 59.

HOW TO OPEN AND USE THE MODERATION APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

   OR

   » If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu, click **Moderation**.

   > **Note:** You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

4. After the app is open, you can select options to see all pending posts or those that have previously been rejected. You can click Approve or Reject at the bottom of a pending post.

Most Recent

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

The Most Recent app is available in your user feed and gives you the ability view the latest community activity in Pulse. This includes status updates, questions, articles, and more. This is a helpful way to view updates in chronological order.

HOW TO VIEW THE MOST RECENT ACTIVITY

You can open the Most Recent page from the Flare output or Pulse dashboard.

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

      OR

   » If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu (or left navigation pane), click **Most Recent**.

   This reveals the most recent post activities for the selected group, tag, topic, or user feed.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

4. Review the content in the list. You can comment, like, edit, follow, tag, and share the most recent posts.

Notifications

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

The Notifications app is available in your user feed and gives you the ability to view and filter a list of Pulse notifications. You can open the Notifications app from the Community tab of the Flare output or Pulse dashboard.

HOW TO OPEN THE NOTIFICATIONS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

   OR

   » If you are logged into the Pulse dashboard, navigate to your user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu, click **Notifications**.

   This reveals a list of your Pulse notifications.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

4. Review the notifications in the list. You can click the available links to navigate to any items of interest.

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HOW TO VIEW A LIST OF NOTIFICATIONS

1. Navigate to your user feed.

2. In the Your Apps menu, click the **Notifications** app.

3. In the Notifications page, review the activity in the Notifications page. You can click the hyperlinks to view the related content.

HOW TO FILTER THE NOTIFICATIONS

1. Navigate to your user feed.

2. In the Your Apps menu, click the **Notifications** app.

3. In the Notifications page, click one of the buttons to view only that type of content.

Profile

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

In the Your Apps menu, the Profile menu item opens the Settings page so you can edit your profile. See "Editing Your Profile" on page 16.

Questions

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

The Questions app gives you the ability to read the questions that have been posted to a specific group, tag, topic, or user feed. If you are a member of the Administrators group, you also have the ability to delete the questions and answers that have been posted.

HOW TO OPEN THE QUESTIONS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

   OR

   » If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu (or left navigation pane), click **Questions**.

   This reveals any questions that have been posted to the group, tag, topic, or user feed.

   > **Note:** You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

1. Navigate to the desired group, tag, topic, or user feed.

2. In the Your Apps menu (or left navigation pane), click **Questions**.

3. In the Questions page, click one of the buttons at the top of the list to filter the list of questions. You can filter questions by:

    » **Recent** View the most recent questions.

    » **Unanswered** View any unanswered questions.

    » **Uncategorized** View the questions that have not been tagged.

    » **Asked by Me** View the questions you posted.

    » **Followed by Me** View questions asked by people you follow.
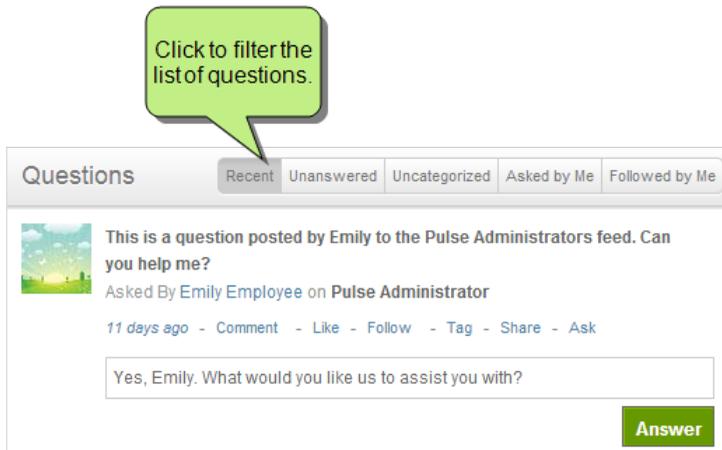
1. Navigate to the desired group, tag, topic, or user feed.
2. Under the question, click **Answer**.
3. In the **Answer** field, type a response.
4. Click **Answer** to submit the answer.

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane), click **Questions**.
3. In the Questions page under the desired post, click ☒. Remember these rules for deleting information:
   » If you are a member of the Administrators group, you can delete any question.
   » If you are a member of the Employees group, you can only delete the questions you posted.
4. In the Confirm Delete Activity dialog, click **Delete Activity** to permanently remove the file.

Read It Later

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

The Read it Later app is available in your user feed and gives you the ability to view the post activity that you bookmarked earlier. See "Bookmarking a Post to Read it Later" on page 134.

HOW TO OPEN THE READ IT LATER APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

   OR

   » If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu, click **Read it Later**.

   The reveals a list of all the posts you have bookmarked. See "Bookmarking a Post to Read it Later" on page 134.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

REVIEWING A READ IT LATER POST

For each post that you add to your read it later page, you have these options:

» **Comment** Post a comment.

» **Like** Like the post.

» **Follow** Follow post activities.

» **Tag** Add a tag to the post.

» **Share** Share the post with other registered users.

REMOVING A POST FROM YOUR READ IT LATER PAGE

If you want to remove the bookmark, click the blue ▯ icon until it turns gray. A gray checkmark indicates the next time you open or refresh the page, the post will no longer appear on your Read it Later page.

Statuses

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

The Statuses app gives you the ability to view the latest updates posted to the selected feed. See "Posting Status Updates" on page 22.

HOW TO OPEN AND USE THE STATUSES APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

      OR

   » If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu, click **Statuses**.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

4. After the app is open, you can filter the statuses shown for those containing links, files, images, videos, or everything.

Tasks

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

The Tasks app gives you the ability to create, view, and manage task activity. You can open the Tasks app from the Community tab of the Flare output or Pulse dashboard.

HOW TO OPEN THE TASKS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

    » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.
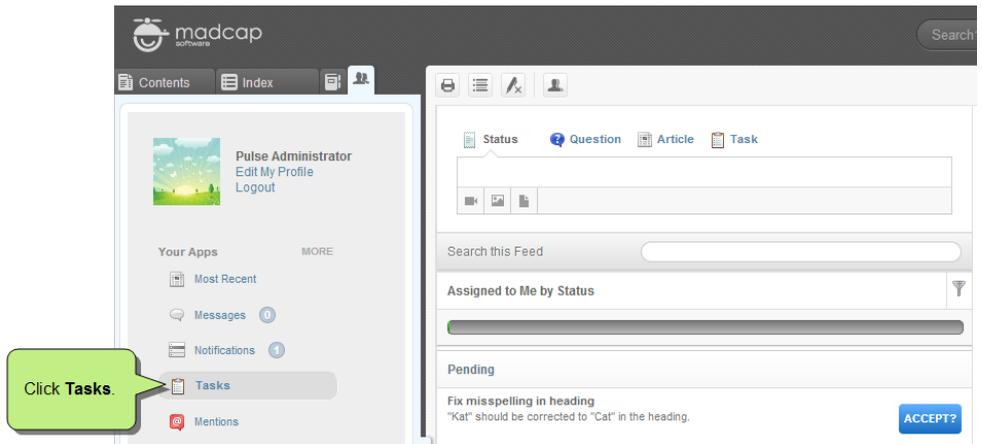
>> If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.
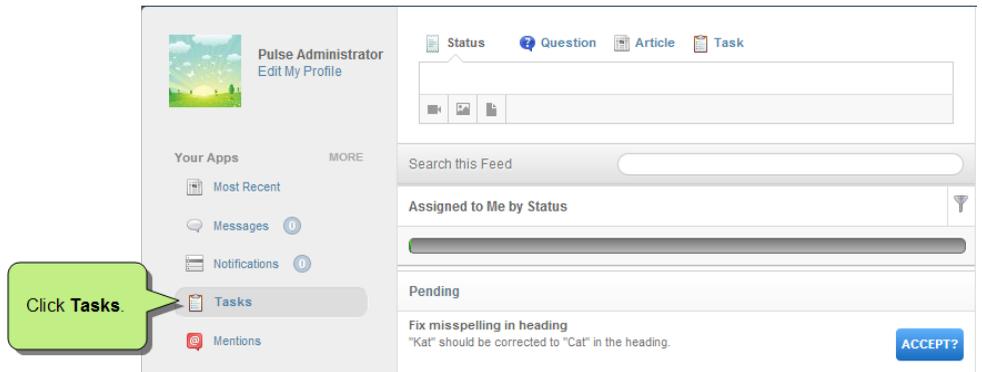
3. In the Your Apps menu (or left navigation pane), click **Tasks**.

   This reveals a list of all the tasks for the selected group, tag, topic, or user feed.

   Note: You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

If you are a member of the Administrators or Employees group and a user assigns you a task in Pulse, you have the option to accept or decline the task. You can also update the task.

1. Navigate to the desired group, tag, topic, or user feed.
2. In the Your Apps menu (or left navigation pane), click **Tasks**.
3. In the Tasks page, any tasks that have been assigned to you appear in the list. You have these options:

   HOW TO DECLINE A TASK

   In the Tasks page, click the **ACCEPT?** button. Then select **Decline Task** from the context menu.

   A task declined message appears and the status of the button label changes to declined.

   HOW TO ACCEPT A TASK

   In the Tasks page, click the **ACCEPT?** button. Then select **Accept Task** from the context menu.

   HOW TO MARK A TASK COMPLETE

   In the Tasks page, click the **ACCEPT?** button. The select **Mark Complete**. This immediately places the task to the completed status.

   HOW TO UPDATE A TASK

   a. In the Tasks page, click a task to view the details:

   The tasks pane opens.

b. In the task pane, make any desired changes.

c. Click **Save**.

HOW TO FILTER TASKS

By default, the Tasks page shows a list of all the tasks that have been assigned to you.

You can filter the list display by clicking ▽ and selecting from the options detailed below.

Click ▼ and select one of these options from the drop-down menu:

» **Assigned to Anyone** Shows tasks assigned to you and tasks assigned to others by you.

» **Assigned to Me** Shows tasks assigned to you

» **Assigned by Me** Shows tasks that you assigned to other users.

» **Assigned to My Direct Reports** Shows tasks assigned to your Direct Reports folder. Direct Reports is an option you can select in the Notifications tab of the Settings page that deliver daily reports to your email. See "Editing Your Profile" on page 16.

HOW TO FILTER TASKS BY VIEW

In the Your Apps menu, click **Tasks**. Then click ▼ and select one of these options from the drop-down menu:

» **Status** Shows tasks assigned by current status.

» **Upcoming** Shows tasks with upcoming due dates.

Top News

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

The Top News app is available in your user feed. It gives you the ability to create, view, and manage the most popular activity in Pulse.

HOW TO OPEN THE TOP NEWS APP

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Choose the appropriate option:

   » If you are logged into the Flare output, click the **Community** tab. The Your Apps menu appears in the left navigation pane.

   OR

   » If you are logged into the Pulse dashboard, navigate to the desired group, tag, topic, or user feed. The Your Apps menu is on the left side of the page.

3. In the Your Apps menu, click **Top News**.

   This reveals the top news in your user feed.

   > **Note:** You can select which applications display in the Your Apps menu. See "Customizing the Your Apps Menu" on page 69.

1. Navigate to your user feed.

2. In the Your Apps menu, click **Top News**.

3. In the Top News page, click ⊠ next to the post that you want to delete. Remember these rules for deleting information:

   » If you are a member of the Administrators group, you may delete any post containing a hyperlink.

   » If you are a member of the Employees group, you can only delete the posts that you shared in Pulse.

4. In the Confirm Delete Activity dialog, click **Delete Activity** to permanently remove the Top News post.

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Finding Topic Leaders

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

The Find Topic Leaders feature works with tags and questions (see "Tagging Posts" on page 40 and "Responding to Questions" on page 137). When your users vote on the best answers to questions, the user who posts the most answers and gets the most votes are ranked on a topic leaders list.

HOW TO FIND A TOPIC LEADER

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.

2. Select **Tags>Find Tags**.

3. In the Find Tags list, click the desired tag to open its page.

4. At the bottom of the tag page, click the **Find Topic Leaders** link.
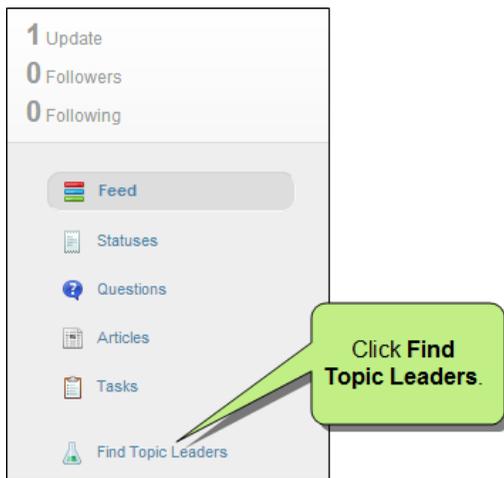
The Find Topic Leaders page opens. This page ranks all of the users who have posted answers to questions with the specific tag. It also shows the total number of votes the answer has received.

Following Community Activities

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

To help you stay connected with your users, members of the Administrators and Employees group can follow a variety of community activities. Following activities gives you the ability to view updates in the Your Apps menu on the Home page (Pulse>Home) of the Pulse dashboard. See "Customizing the Your Apps Menu" on page 69.

Following Users From the Pulse Dashboard

You can follow other users who are members of the Administrators or Employees group.

HOW TO FOLLOW A USER—PULSE DASHBOARD

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.

2. Select **People>Find People**.

3. In the Find People page, locate and click the name of the user that you want to follow. This opens the user's system feed.

Note: You can only follow users who are members of the Administrators or Employees group.

4. Click the **Follow** button. Pulse will now notify you about user activities. After following a user, you have these options:

HOW TO OPEN YOUR FOLLOWED BY ME LIST

   a. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.

   b. Select **People>Followed by Me**. This opens a list of all the users that you follow.

HOW TO STOP FOLLOWING A USER

   a. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.

   b. Select **People>Followed by Me**. This opens a list of all the users that you follow.

   c. Click the user you want to stop following. This opens the user's feed.

   d. Click **Unfollow**. Pulse will not longer notify you about activities involving that user.

Following Users From the Flare Output

You can follow other users who are members of the Administrators or Employees group.

HOW TO FOLLOW A USER—FLARE OUTPUT

1. Log in to the Flare output using an account that is a member of the Administrators or Employees group.

2. In the Pulse form, hover over the name of the user you want to follow. A popup window appears.

3. Click **Follow**. Pulse will now notify you about user activities. After following a user, you have these options:

> **Note:** You can only follow other members of the Administrators or Employees group.

HOW TO STOP FOLLOWING A USER

1. Log in to the Flare output using an account that is a member of the Administrators or Employees group.

2. In the Pulse form, hover over the name of the user you want to stop following. Then click **Unfollow**. Pulse will no longer notify you about activities involving that user.

Following Searches

You can search for Pulse content in the Pulse dashboard and then follow your searches.

HOW TO FOLLOW SEARCHES

1. Log in to the Pulse dashboard using an account that is a member of the Administrators or Employees group.

2. In the search field, type your search term. Then select **Search for Posts with this Phrase** from the context menu.

3. In the results page, click **Follow**.

Following Topics

You can subscribe to a feed when you want to follow any community activity for a topic. You can also add a topic's feed to your Favorites list:

» **Subscribe to a Feed** See "Subscribing to Communities and Topics" on page 145.

» **Work With Favorites** See "Working With Favorites" on page 159.

> **Note:** Following posts is available to all registered Pulse users. See "Following Posts" on page 37.

> **Note:** Users can apply tags to posts. Tags make it easier for readers to find posts about a specific subject in Pulse. For example, you can tag all topics about cats with a "cat" tag. See "Tagging Posts" on page 40.

Inviting People

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

Members of the Administrators or Employees group can send invitations to other Administrators and Employees to read, follow, or subscribe to a specific topic, group, tag, or user.

Sending Invites

Use the following steps to send invites to people.

HOW TO SEND INVITES TO PEOPLE

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Navigate to a topic, group, tag, or user. Then click the **Invite People** link.
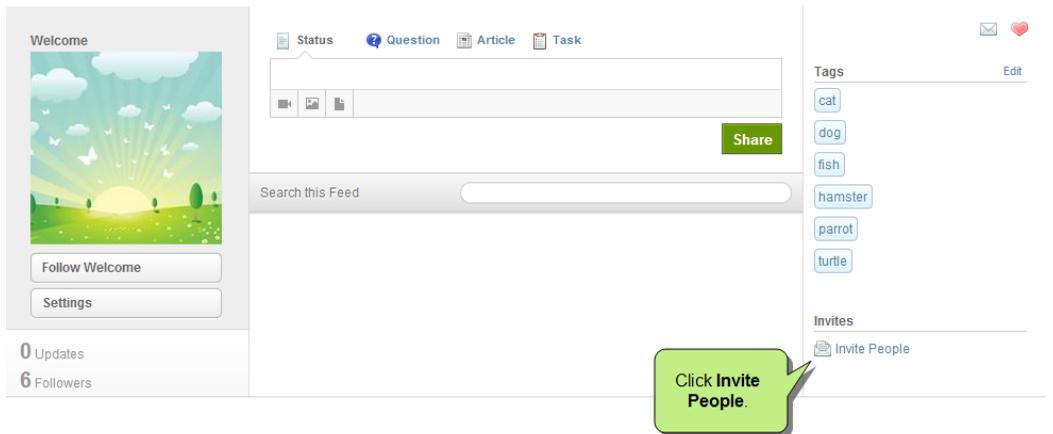
This opens the Invite People dialog.

3. In the Invite People dialog, type all or part of a user or group name. Then place a check mark next to the desired matches and click **Invite**.
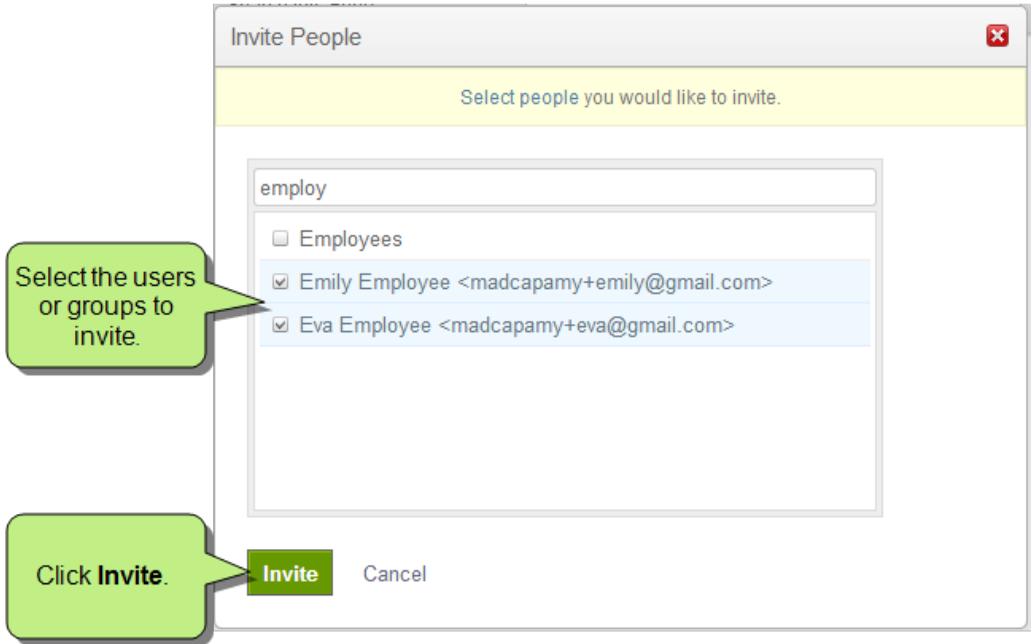
The system sends an invitation to the designated recipients.

Responding to Invites

Use the following steps to respond to invites.

HOW TO RESPOND TO INVITES

You can invite registered users to follow a topic, group, tag, or user.

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Check your notifications for invites. See "Notifications" on page 51.
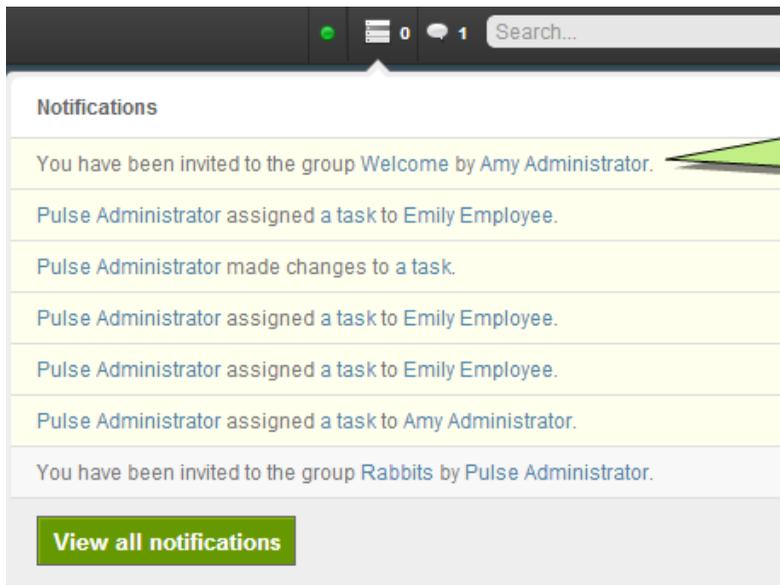
3. Click the invitation.

   In this example, the user was invited to join the group for the Welcome topic, as shown below. You can then per-
   form a variety of different tasks.
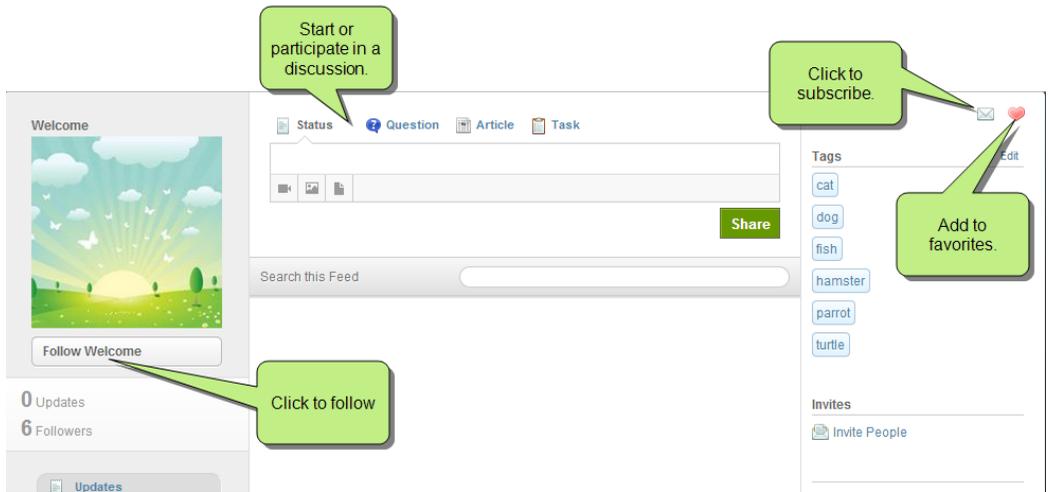
Bookmarking a Post to Read it Later

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

The "Read it Later" feature let's you bookmark status updates, questions, articles, and tasks so you can read the information more closely at a later time.

HOW TO ADD A POST TO YOUR READ IT LATER PAGE

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Navigate to a topic, user, group, or tag feed.

3. Hover over the upper-right corner of any post in the discussion form. A gray bookmark appears.
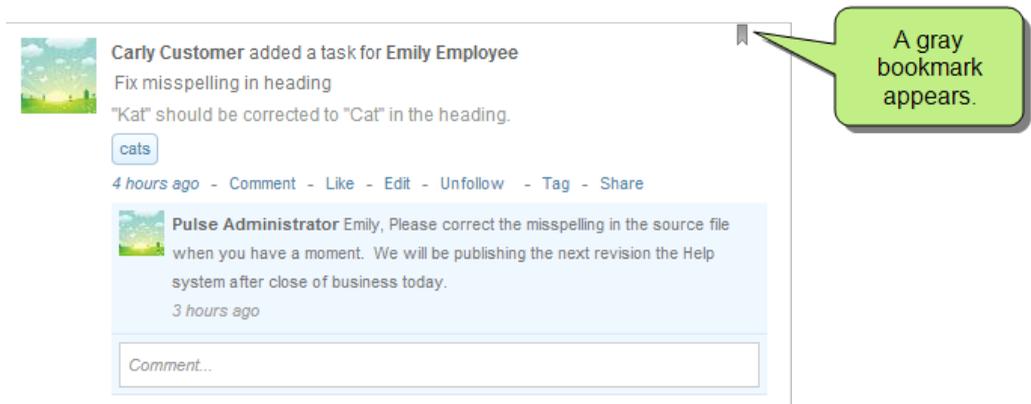
4. Click the gray bookmark so it turns blue. A blue bookmark indicates the post has been added to your Read it Later page.

   Note: You can repeat this step for as many different posts as you want.

Note: To remove a post from the Read it Later page, click the blue bookmark so it turns gray.

Responding to Status Updates

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

When a registered user posts a new status update, you have several options if you choose to respond to the post.

The list below describes each available response. An asterisk (*) denotes that the option is only available to members of the Administrators and Employees group:

» **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 36.

» **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 39.

» **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity (see "Following Community Activities" on page 126). When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.

» **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 40.

» ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and then choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on page 144.

Responding to Questions

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

When a registered user posts a question, you have several options if you choose to answer it.

The list below describes each available response. An asterisk (*) denotes that the option is only available to members of the Administrators and Employees group:

» **Answer the Question** Type an answer in the Answer field and press **Enter** to post it. See "How to Answer a Question" on the next page.

» **Ask a Specific User for an Answer** Click **Ask** to open the Ask dialog. This lets you solicit a response to the post from the people you select. See "How to Ask a Specific User or Group for an Answer" on page 140.

» **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 36.

» **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 39.

» **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity (see "Following Community Activities" on page 126). When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.

» **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 40.

» ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and the choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on page 144.

1. Navigate to any Flare topic where a question has been posted.

2. In the **Answer** field, type your response. Then click **Answer** or press **Enter**.

All registered users have the ability to vote for answers in the Flare output and Pulse dashboard. If you want to vote for an answer, you have these options:

» **Vote Up** Click the up arrow to vote in favor of the given answer.

» **Vote Down** Click the down arrow to vote against the given answer.

The more votes an answer receives, the higher it moves up in the display order. The answer with the most votes is listed closest to the question.
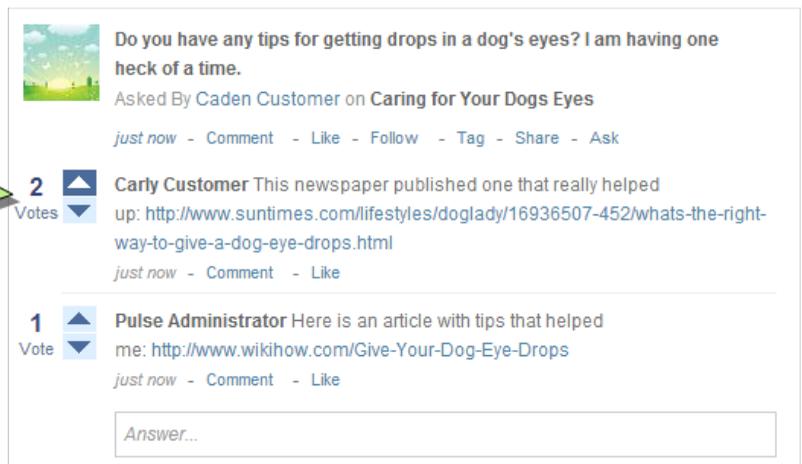
If a user decides to add one or more tags to the question, voting on an answer will add weight to the Pulse user's expertise rating. See "Finding Topic Leaders" on page 125.

If you are a member of the Administrators or Employees group and know of a particular individual (or Pulse group) that might have an answer to the question, you can solicit their input using the Ask option.

1. Navigate to any Flare topic where a question has been posted.

2. In the question area, click the **Ask** link.

The Ask for an Answer dialog appears.

3. In the **Select the people you would like to ask for an answer** box, type a full or partial name or email address. Place a check mark next to the users (or groups) to ask.
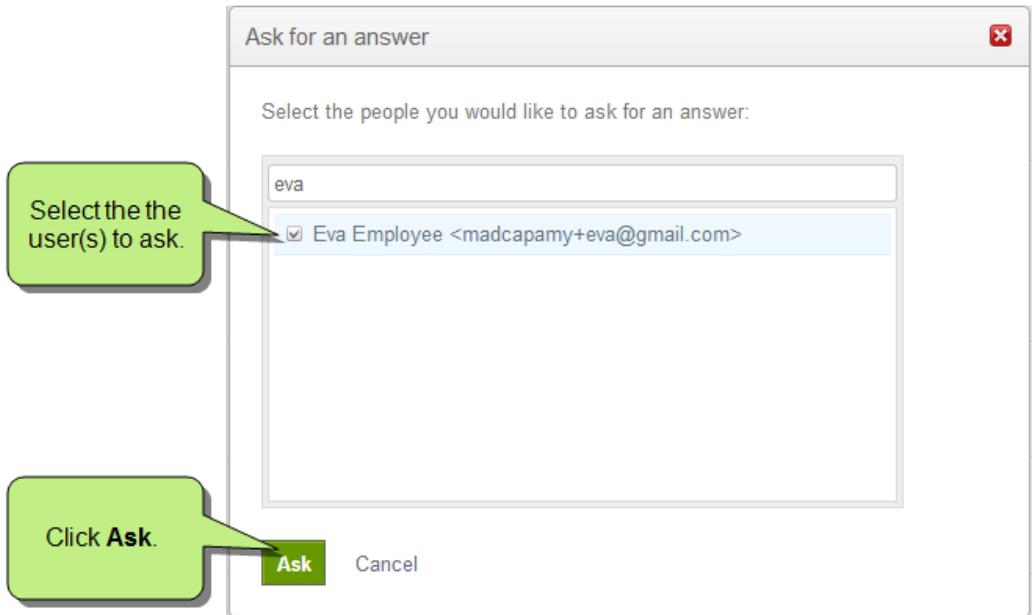
4. In the dialog, click the **Ask** button.

   Pulse notifies the selected people. The user will be notified then next time he or she logs in to the Pulse dashboard.

   Note: To receive the notification message by email, the user must enable the appropriate feature in the Notifications tab on the Settings page of their profile. See "Editing Your Profile" on page 16.

Responding to Articles

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

When a registered user posts a new article, you have several options if you choose to respond.

The list below describes each available response. An asterisk (*) denotes that the option is only available to members of the Administrators and Employees group:

» **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 36.

» **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 39.

» **Edit the Post** Click **Edit**. Then make any changes. This option is only available when you author the post.

» **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity. See "Following Community Activities" on page 126. When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.

» **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 40.

» ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and the choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on page 144.

Responding to Tasks

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

All registered users can respond to task assignments posted in the topic feeds associated with a Pulse system (i.e., the embedded discussions forms that appear at the bottom of each topic in the Flare output).

If you have not been assigned a task, the list below describes each available response that is available. Members of the Customers and Employees group can edit tasks, with the exception of the Tags field. When tasks are changed, Pulse sends a notification to the task owner.

» **Add a Comment** Click **Comment**. Then type your comment and press **Enter** to post it. See "Adding Comments" on page 36.

» **Like the Post** Click **Like**. This adds your name to a list of users who likes the post. See "Liking and Unliking Activity" on page 39.

» **Edit the Post** Click **Edit**. Then make any changes. This option is only available when you author the post.

» **Follow the Post** Click **Follow**. Pulse will send a notification to you when there is any post-related activity. See "Following Community Activities" on page 126. When you create a post, Pulse automatically selects the follow option for you. You can unfollow any posts you might be following.

» **Tag the Post** Click **Tag**. This opens the Edit Tag dialog so you can add one or more tags to the post. See "Tagging Posts" on page 40.

» ***Share the Post** Click **Share**. This opens the Share Activity dialog so you can type a message and the choose to share the message and post on your feed , someone else's feed, or in a group. See "Sharing Posts" on the next page.

Note: If you have been assigned a task and you are a member of the Administrators or Employees group, you also have a number of task management options. See "Tasks" on page 117.

Sharing Posts

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

You can share Pulse posts on your own feed, on someone else's feed, and in a group.

HOW TO SHARE A POST

1. Immediately below a post, click the **Share** link.

   This opens the Share Activity dialog.

2. In the Share Activity dialog, type a message in the **Message** field.

3. In the **Share** list, select one of these options:

   » **On your own feed** This lets you share the article on your feed.

   » **On someone else's feed** This lets you share the article on the feeds of the registered users you specify. If you select this option, type the user name(s) in the **People** field.

   » **In a group** This lets you share the article in a group feed. If you select this option, type the group name(s) in the **Group** field.

4. Click **OK**.

Subscribing to Communities and Topics

The ability to subscribe to communities is available to **Administrators** and **Employees** only. The ability to subscribe to single topics is available to **Administrators**, **Employees**, and **Customers**.

If you want to be notified when Pulse users post updates, questions, and articles, you must subscribe to the community or a topic.

Subscribing to a community globally is recommended because you are then receive email notifications when activity occurs on any topics within that community.

Alternatively, if you subscribe only to a single topic, you will be notified only when activity occurs on that specific topic. Depending on your access permissions, you can also subscribe to feeds that are associated with groups, tags, and users.

HOW TO SUBSCRIBE TO A COMMUNITY

1. Log in to the Pulse dashboard with an Administrator or Employee account.

2. Select **Systems>Find Systems**.
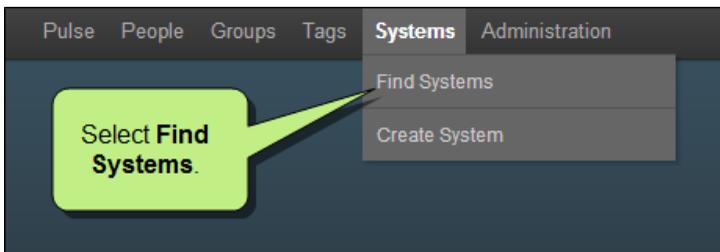
3. On the Find Systems page, locate and click your community.
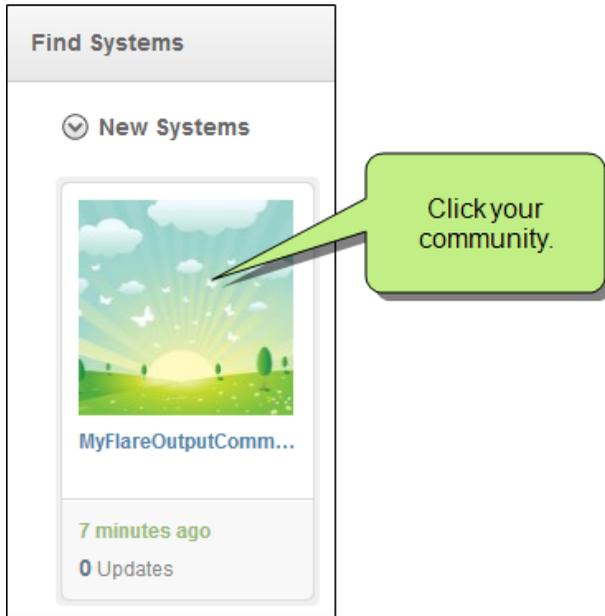
4. On the page that opens, click the envelope icon in the upper-right corner.

The pressed look of the icon indicates that you have subscribed to the community.

1. Log in to Pulse from the Flare output or using the Pulse dashboard. See "Logging In to Pulse" on page 11.

2. Navigate to the desired Flare topic feed, user feed, group feed, or tag feed. Then click ✉ .You have these options:

   HOW TO SUBSCRIBE TO A SINGLE TOPIC FROM THE FLARE OUTPUT

   The table below describes your subscription options in the Flare output.

Feed Type	Instructions
System Feed	Navigate to a Flare topic.
User Feed	Click a user name to reveal the user's feed.
Group Feed	Click a group name to reveal the group's page.
Tag Feed	Click a tag to reveal the tag's page.

   HOW TO SUBSCRIBE TO A SINGLE TOPIC FROM THE PULSE DASHBOARD

   The table below describes your subscription options in the Pulse dashboard.

Feed Type	Instructions
System Feed	Navigate to a Flare topic.
User Feed	Click a user name to reveal the user's feed.
Group Feed	Click a group name to reveal the group's page.
Tag Feed	Click a tag to reveal the tag's page.

Note: If you opt to moderate all of your posts (see "Moderating Posts" on page 59), there is no need to subscribe to them as well since you will automatically receive emails with the moderation feature. However, if you decide not to use the moderation feature, it is recommended that you subscribe to all of your topics globally so that you are informed whenever someone posts to that topic.

Keep in mind that, with the global subscription route, email notifications are tied to each community, whereas the moderation route sends email notifications to all moderators, regardless of the community where the post was made. For example, let's say you've got two documentation groups (Group A and Group B) producing different Flare outputs. Suppose someone in Group A creates a Pulse community associated with his Flare output and publishes it. In addition, that person chooses the option to moderate posts for that community. Whenever an end user posts a comment to that Flare output, all moderators in both Group A and Group B will receive a notification about that post. That might be fine for the moderators in Group A, but the moderators in Group B may not want to see those emails, because they have nothing to do with any of their outputs. There are two options to avoid this kind of situation. First, you can install Pulse on two different servers—one for Group A and the other for Group B. Second, you can make sure all communities are using the global subscription method instead of moderation; so you'd be giving up moderation, but you'd be able to work off the same server and you'd only receive email notifications for the communities to which you've subscribed.

Note: If your user account does not have an appropriate level of access permissions, the system will show the message "You do not have permission to view the content you have requested."

Note: Once subscribed to a feed, the Pulse system will issue a notification where there is any activity. You can change your notification settings to suit your preference. See "Editing Your Profile" on page 16.

Tagging Content

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

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

Using Tags

While tags can be created and applied to posts by any registered user (see "Tagging Posts" on page 40), members of the Employees and Administrators group also have the ability to create, follow, and delete tags in feeds.

E X A M P L E

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

Pulse Administrator to **Feeding a Fish** Here is a link with information about healthy options for goldfish. http://www.petplace.com/fish/healthy-food-for-your-goldfish/page1.aspx

fish

24 days ago - Comment - Like - Follow   - Tag - Share
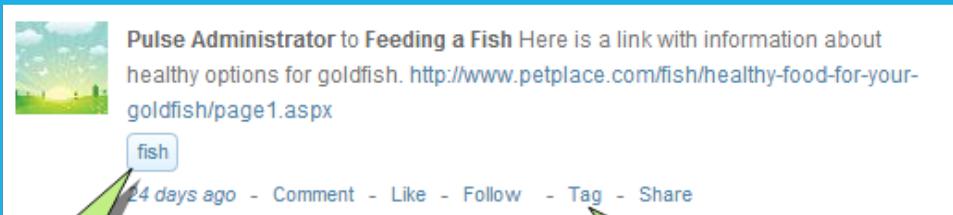
This is a tag.

Click **Tag**.

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.

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

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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**.

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.

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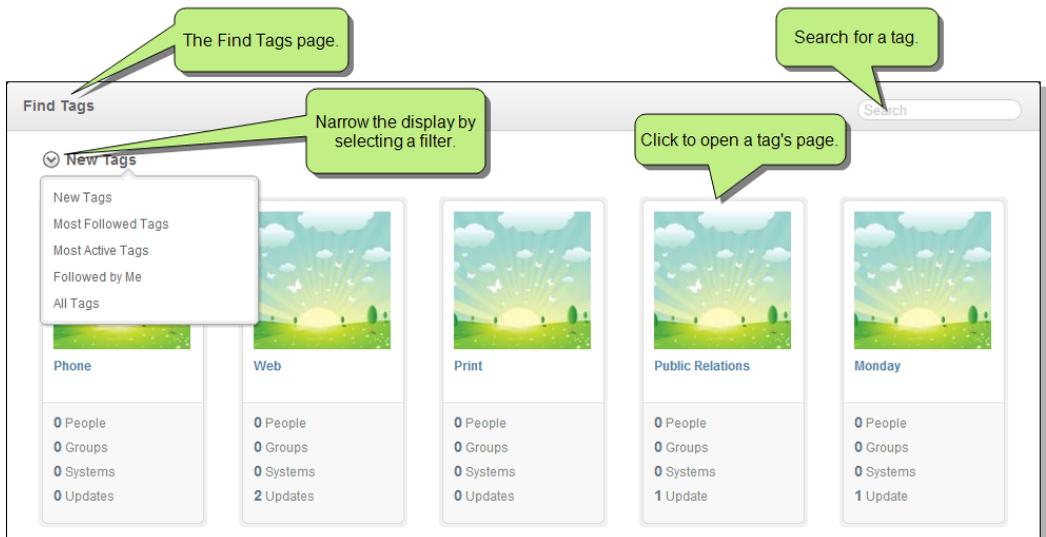
4. Depending on what you want to accomplish, do one of the following:

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.

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. See "Finding Topic Leaders" on page 125.

Using Mentions

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

You can use the Mentions feature to mention other registered users by name when posting status updates or creating articles. Like many popular social media sites, this feature lets you type the @ sign and then a user name to mention a user in your update.

HOW TO MENTION OTHERS IN STATUS UPDATES AND ARTICLES

1. Navigate to the desired topic.

2. Start posting a status update or an article. See "Posting Status Updates" on page 22 and "Posting Articles" on page 30.

3. When you want to mention another registered user, type the @ sign. This reveals a drop-down that describes how to use the mentions feature.

4. Begin typing letters that match the user you want to mention. When a match is found, select it in the drop-down list.
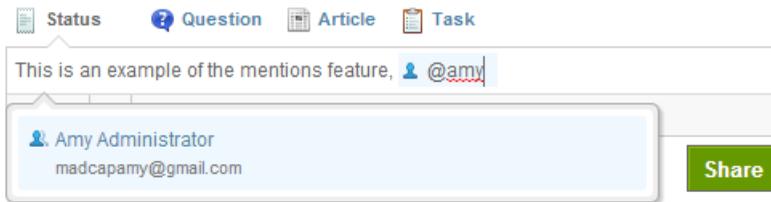
5. Finish typing the status update or article. Then click **Share**. The post is added and Pulse sends notifications to the people(s) you mentioned.
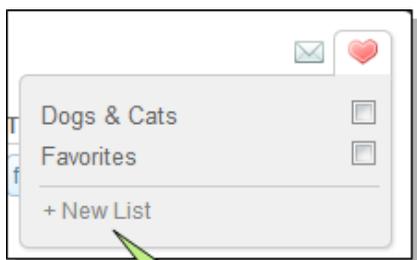
Working With Favorites

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

Pulse allows you to add group, tag, and topic feeds to a list of favorites. In addition, you can create more than one favorites list to help you organize information. The Favorites feature is available both the Flare output and Pulse dashboard.
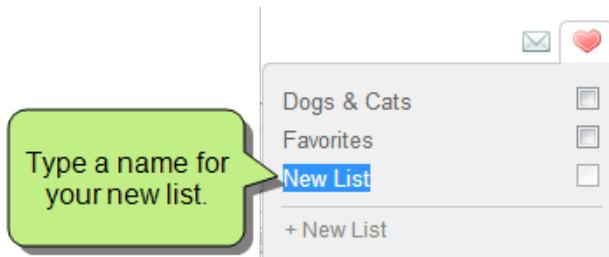
HOW TO CREATE A FAVORITES LIST

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Navigate to the desired group, tag, or topic feed.

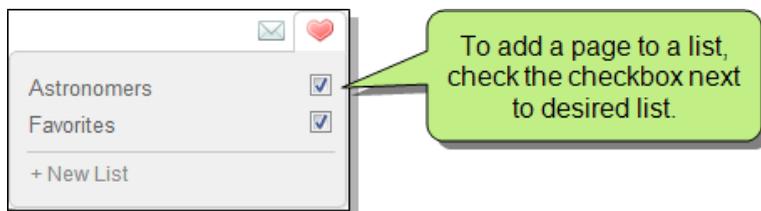3. In the top right corner of the feed, click ❤. Then click **New List**.

4. In the space provided, type a name for your new list and press **Enter**.

Type a name for your new list.

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Navigate to the desired group, tag, or topic feed.

3. In the top right corner of the feed, click ♥. Then place a check mark in the desired favorites list.

To add a page to a list, check the checkbox next to desired list.

1. Log in to the Flare content or Pulse dashboard using an account that is a member of the Administrators or Employees group. See "Logging In to Pulse" on page 11.

2. Depending on which tool you are using, do the following:

   » If you are logged into the Flare output, click the **Community** tab.

   OR

   » If you are logged into the Pulse dashboard, choose **Pulse>Home**.

3. In the left pane, locate the **Lists** area and highlight the list you want to remove.

4. Click ⊖.

5. In the Delete Favorites dialog, click **OK**.

> **Note:** You cannot delete the default list named "Favorites."

CHAPTER 6

Searching for Community Results

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

When integrating a Pulse system with a Flare community, you have two different search options. You can search a feed in Pulse or, if you enable the feature, you can extend the scope of a Flare search to include the Flare community results stored in Pulse.

This chapter discusses the following:

Searching a Pulse Feed

In the Flare output, users can search a Pulse feed for matches. With this method of search, the scope of the search is limited to the active topic feed.

HOW TO SEARCH A PULSE FEED

1. Log into the Flare output or Pulse dashboard using a registered Pulse account. See "Logging In to Pulse" on page 11.

2. In the embedded discussion form, type a search query in the **Search this Feed** box.

3. Press **Enter**. This searches only the active feed.
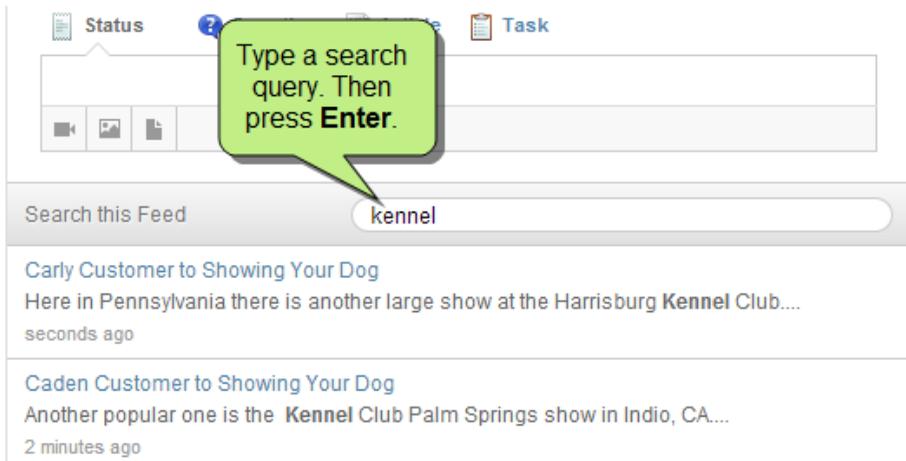
# Searching the Flare Output for Community Results

If you enable the display of community search results in the Flare skin (i.e., select **Display community search results**), the scope of a Flare search can be extended to include matching community activity from Pulse.

HOW TO SEARCH THE FLARE OUTPUT FOR COMMUNITY RESULTS

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

2. In the search entry field associated with the Flare output, type your search query and then press **Enter**.

3. In the search results page, any posts containing your search terms appear under a heading titled "Community Results." Any matching Pulse activity is listed beneath the heading.
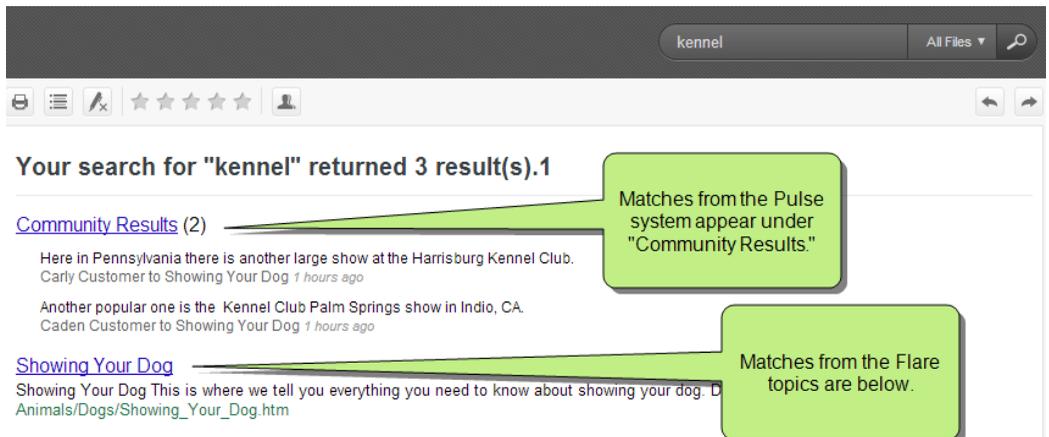
PDF Guides

The following PDF guides 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

APPENDIX