

# PULSE - USER GUIDE

This document provides guidance on using Pulse to gain and share insight  
with the people you work with.

*Getting the  
most out of  
Pulse*

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## **What's New in Pulse 4.0?**

Here is a brief description of each of the new features of version 4.0 of Neudesic Pulse.

### **Skills and Endorsements**

Assign the right people, to the right project, at the right time. Building effective teams is the most important aspect of executing strategic initiatives. Quickly identify the perfect team for your next project.

### **Business Profiles**

Track important information such as Availability, Location, and Bill Rates for easy resources selection and identification. Refine your search based on Skills and other custom information.

### **Business Relevant People Finder**

Entering a new market? Building a team? How do you know if you have the right people to reach your goals? Pulse is a great way to identify people and experts for building highly effective teams while exposing knowledge gaps.

### **It's Your Network**

Looking to integrate your business systems? Want to pull in information from a portal? Use the new JavaScript App extensibility to create limitless value for your employees.

## **At A Glance**

Read this chapter to learn about Pulse's features how to participate in conversations and more.

### **Navigation Bar**

Use the navigation bar to move around within Pulse. You can always return to your Feed by clicking Pulse.

### **Your Profile/Image**

Displays the image you provide via the Edit my profile link. You are given a default image until you update your avatar.

### **Your Activity**

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

### **Search**

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

### **Search This Feed**

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

## **Share your thoughts, links, images, videos, files and insight**

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

### **Using “@”**

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

### **Liking**

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

### **Commenting**

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

### **Following a Post**

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

### **Sharing Files and Media**

Sharing Files and Media (such as Videos and Images) can be done with a few clicks. Underneath the Update Bar you will find icons for sharing Files, Images and Videos. Click your desired icon to upload a file from your hard drive.

**SharePoint Users:** You will also have the option to link any SharePoint Asset to a post.

### **Suggestions**

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

### **Unified Activity Stream**

This section displays the updates from People, Groups, Tags and Systems you follow. This is where you get the Pulse of your company.

## Tips and Tricks

### Getting Started

#### Your First Visit

We recommend you take the following actions on your first visit to Pulse:

1. Update your Profile Image by clicking **Edit My Profile...Change Profile Image**
2. Follow who you report to, and who reports to you.
3. Follow colleagues within you department/practice/location
4. Follow and Create groups that interest you and your colleagues

#### Your First Update

Many people are intimidated by their first update. You are welcome to provide anything you wish. Here are some suggestions:

1. Provide a valuable link to an industry article
2. Ask a question
3. Ask for feedback
4. Let people know what you are working on
5. Say “Hello”

#### Follow, Follow, Follow

Finding and following People, Groups, Systems, and Tags are essential to getting the most out of Pulse. The more you follow, the more activity you see on your feed, the more in touch you are with your company.

#### What Should I Share?

The updates you share are entirely up to you. Some of the posts that are most valuable and generate great conversations are those that request information, opinions, or other community feedback. Posting Images is a good way to get people to notice your post.

Links are also very common. If you mind a relevant link on the Web, share that...

#### Who Can See What I Share?

The following People can see what you share

- People who follow you can see everything you share.

- People following a Group can see what you share in that Group.
- People that follow a specific Phrase you used.
- People can see Comments you make to the People they follow.
- People can see posts that have Tags that the follow tagged within them.

It's important to note that Pulse is a very open system. The only place to ensure People cannot see a Pulse is through the use of Private Groups and Direct Messages sent to individual members.

## My Feed/Home

Your feed is an aggregation of all of the updates for the People, Groups, Tags, and Systems you are following. For more information see the sections **People, Groups, Phrases, Systems** and **Tags**.

## User Profiles

Individual users have the ability to fully customize their profiles. Users are encouraged to log in and update **Personal Information, Skills and Expertise, Experience, Education** and **Certifications**.

### Skills and Expertise

System Administrators have the ability to build out a list of Skills and expertise that are important to your company. Add a skill to your profile by clicking **Edit Skills** on your profile. Once added, users are encouraged to go to their profiles and fill out their skill set. This allows users to be searchable using the **Advanced Search** feature and allows colleagues to endorse those skills.

### Endorsements

Endorsements are a vital piece to the User Profile. Endorsements are used to validate skills that people list for themselves. To endorse someone, simply go to their profile and click the **Endorse** button next to the skill you would like to endorse.

## People

You can follow anyone within your company who has access to Pulse. Along with customers from external networks that have been added by administrators.

### Finding People

To find people that you want to follow, perform the following actions

1. From the Home page, click **People**
2. To search by name, click into the People Search box



- a. Start typing the person's first or last name and press Enter. This will generate a search result based upon your entry.

## Following People

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

## Why Should I Follow People?

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

## What People Should I Follow?

You can follow anyone you want to in Pulse. It's a good idea to follow at least the people in your department or practice. It's also a good approach to follow the experts of your company, the thought leaders, and executive management. These people will keep you in touch with the direction your company is going.

## Advanced Search

Advanced search allows users to find people within the organization based on certain criteria. To access advanced people search hover over the **People** tab on the Navigation Bar. Click, **Advanced People Search**. From here you can search for people based on Skill, Education, First Name, Last Name, Location, Title, Email, Certifications and Experience.

## Groups

Groups allow you to create a location for conversations and ideas about a specific topic. Some common groups might include **Human Resources**, **Marketing**, and **Sales**. You can create your own group and invite People to share conversations. Groups can be secured so that conversations in that Group are only seen by People you choose.

## Creating Groups

Anyone can create a Group. They are a great way to engage with your company. To create a Group perform the following actions:

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

5. Click **Create this Group**

### **Working with a Partner or Customer?**

Use Pulse as a collaborative workspace. While setting up your Pulse group, change the audience to **“Employees and Customers”**. Once this is done inviting users from an external network is easy. Once the group is setup:

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

### **Securing Groups**

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

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

### **Customizing Groups**

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

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

### **Secret Groups**

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

### **Following Groups**

In the same manner that you follow People, you can follow Groups at which point the activity of that Group will automatically be added to **“My Feed”**.

# Tags

## What are Tags?

Tags are an easy way to aggregate conversations of related People, Groups, Questions Systems, and Phrases. You can think of a Tag as a category. For example, if you want to categorize People based on their location you could create a Tag called “West Region” and add all the people to that Tag. The result would be one place to see all conversations in the West Region.

## Why use Tags?

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

## Creating Tags

Anyone can create Tags. To create a Tag, perform the following actions:

1. From any Group, Person, System or Phrase, on the right hand side of the screen, you will see **Tags**.
2. Click **Edit**
3. In the textbox input any word that describes your Group, Person, System or Phrase

To Tag a Post:

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

## Tag Hierarchy

We approach tags as categories that relate all People, Groups, Systems and Phrases. Pulse also allows you to link Tags together by using Parent/Child Tags. If you have a broad category is labeled a parent tag Pulse allows you to gather content from any sub-category and display it with the parent tag. To assign parent/child tag relationships:

1. Go to the page of your parent tag, click **Setting**
2. Click **Manage**
3. Start typing the name of the parent tag, Pulse should auto complete to avoid mistakes
4. Beneath it begin listing appropriate child tags. Click **Save**

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

## Private Tags

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

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

## Tasks

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

To assign a task begin by clicking the "Task" option on the Home screen, and giving a description of what you would like done. Next click "Share Task"

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

### Accepting and Completing Tasks

When someone asks you for help using Pulse Tasks you will receive a notification. To view the task click the Tasks Link on your Home page. Here you will see the list of Pending and Completed Tasks.

When a new Task is assigned to you a blue box will ask you "OK?", here you have the option to accept or decline the Task. If accepted, the task will go into your Pending area, where you can see the details of the Task. For example: Due dates, Tags, people you will be working with.

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

## Direct Messaging

Share files and conduct one-to-one and group conversations from within Neudesic Pulse 3.0, or communicate with others via text or voice through direct integration with Microsoft Lync. You also can receive email notifications from Pulse to keep you in the conversation when you're not logged in. There are couple ways to start a direct message:

1. From your Inbox:
  - Your Inbox keeps track of every Pulse conversation that you take part in. To reach the Inbox click the **Messages icon** found on the top right of your screen, directly to the left of the universal search bar.
  - Once you reach the message center you can go back and continue previous conversations or start a new one click **New Message** on the top right of your inbox.
  - Fill out the names of your recipients, the message that you want to send and click **Send**. You also have the option to attach a file if you wish.
  - As messages come back you will be notified via the inbox.
2. From within the Pulse UI:
  - Throughout the Pulse User Interface you will find the **speech bubble icon**. Clicking this will initiate a conversation with the person or group that you have selected.
  - Where can I find the speech bubble icon? Two places:
    1. On every person and groups page. (Below the Follow/ Unfollow button)
    2. On a person's Contact Card that pops up after hovering over their avatar.

## Questions

Questions is an exciting new capability that provides a continually improving set of questions and answers that are created and organized by everyone that uses Pulse. Pulse's Questions capability is a great way to create a crowd-sourced knowledge base that everyone contributes, refines, and utilizes.

### Asking Questions

To ask a question, perform the following actions:

1. From the Home Page click, **Questions**
2. In the provided text box, begin typing your question
3. If your question has already been asked you can select it from the drop down
4. Click **Add Question**

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

### Answering Questions

To answer a question, perform the following actions:

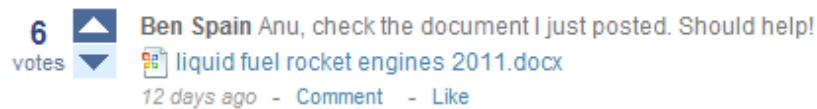
1. Click the title of the question
2. In the textbox below **Add Answer** begin typing you answer
3. Once complete, click **Answer**

### Voting on Answers

A key component of Pulse Questions is in the crowd-sourcing of answers. This capability is provided to you in the form of voting for answers. When reviewing a question and its related

answers you can click the vote up or vote down arrows. As an answer accumulates “up” votes it will rise to the top. To vote of answers, perform the following actions

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



### Tagging Questions

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

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

### Phrases

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

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

### Staying Organized with Pulse

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

#### Favorites

Everything that can be followed within Pulse has its own page, weather that is People, Groups, Systems or Tags. Marking any one of these as a favorite allows you to do two things.

1. All favorites can be accessed from the top navigation bar with a single click.
2. Favorites can be used as filters. On the Left bar of your Unified Activity Stream you have a set of “List”. Upon clicking on the “Favorites” List, Pulse will auto-organize your newsfeed into the most recent updates from your favorites.

## List

List are a quick and easy way to organize your newsfeed into topics you care about. For example, want to know what your direct reports are doing on a day to day basis? Put them into a list that you can visit daily. To make a list:

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

Once created your new list will be available on your Unified Activity Feed to be used as an easy way to filter through your data.

## Filters

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

## Timeline

The timeline is a great way to see what conversations are driving the most interest based on Comments and Likes. Visit the Timeline every day to get the Pulse of your company. Hover over points in your timeline to see what posts were trending at that point in time.

## Mobile Applications

Pulse provides platform specific applications for iPhone, BlackBerry, Android, and Windows Phone 7. All applications support the following Pulse activities:

1. Post a message
2. Post a message with an image from you Camera or Gallery.
  - a. When using your camera you should lower the resolution to ensure appropriate upload times.
3. Find and Follow People
  - a. Use the Search box next to your post box
4. Find and Follow Groups
  - a. Use the Search box next to your post box
5. Find and Follow Tags

- a. Use the Search box next to your post box
6. Find and Follow Systems
  - a. Use the Search box next to your post box

### **iPhone App**

Pulse is available in the iTunes App Store. To find it do a search for **Neudesic Pulse**

The first time you open Pulse you will be prompted for the following information

1. User: input you corporate user account
2. Password: input you corporate password
3. Server: input your server URL. If you don't know it, ask a system administrator.

### **Android App**

The Android App is available in the Android Market. Search of **Neudesic Pulse**

When you first launch Pulse you will be directed to the Settings for Pulse. You must provide the following information

1. User: input you corporate user account
2. Password: input you corporate password
3. Server: input your server URL. If you don't know it, ask a system administrator.

### **Blackberry App**

The Blackberry Application can be downloaded from the Blackberry App Store. Just search for **Neudesic Pulse**

When you first launch Pulse you will be directed to the Settings for Pulse. You must provide the following information

1. User: input you corporate user account
2. Password: input you corporate password
3. Server: input your server URL. If you don't know it, ask a system administrator.

**Note: In certain environments that run BlackBerry Enterprise Server access to this site may be restricted. In this situation, please contact Product Support for a download that can be used with the BlackBerry Desktop Software to install Pulse.**

### **Windows Phone 7 App**

The Windows Phone 7 App is in the Microsoft Marketplace. From the Marketplace click Apps and search for **Neudesic Pulse**

When you first launch Pulse you will be directed to the Settings for Pulse. You must provide the following information



1. User: input your corporate user account
2. Password: input your corporate password
3. Server: input your server URL. If you don't know it, ask a system administrator.

## SharePoint Extensions

Pulse includes a series of extensions for SharePoint that provide rich conversations, following and enhanced social networking right inside SharePoint.

### What can I do in SharePoint?

The Pulse SharePoint Extensions allow you to bring Pulse into any SharePoint site. You can have discussions that are Site wide and even on individual items.

### How do I work with the Web Parts?

If you have authoring permissions on your SharePoint site you can use the web parts to include Pulse conversations.

### Adding Conversations to List Items, Documents and Tasks

Pulse supports the ability to add conversations to each item inside SharePoint. For example, you can add conversations for each Document in the Shared Documents document library.

To add item level conversations perform the following actions:

1. From the home page of your SharePoint Site, navigate to the List/Document Library you want to have conversations
2. From the Library or List tab, under **Customize List**, click **Form Web Parts, Default Display Form**
3. From the Edit Page click **Add a Web Part**
4. In the **Categories** select **Pulse for SharePoint Sites**
5. Select **Discuss this Item**
6. Position the web part below the default form
7. Click **Stop Editing**
8. Repeat above but on step 2, click **Default Edit Form**
9. Do not perform this on the Default New Form as the conversation will not be started on the new form.

### Adding a Site Conversations

You can add a conversation to your SharePoint site that can be interacted with from any page on that Site. To add a Site level conversation, perform the following actions

1. From the page of your SharePoint Site that you want to add a Pulse Conversation, click **Site Actions... Edit Page**
2. From the desired Web Part Zone click **Insert... Web Part**
3. In the **Categories** select **Pulse for SharePoint Sites**
4. Select **Discuss this Site**

5. Position the web part below the default form
6. Click **Stop Editing**

### **Adding the Current User's Feed**

You can embed the current's users feed on any page in SharePoint. To add the current user's Feed to a SharePoint page, perform the following actions:

1. From the page of your SharePoint Site that you want to add a Pulse Conversation, click **Site Actions... Edit Page**
2. From the desired Web Part Zone click **Insert... Web Part**
3. In the **Categories** select **Pulse for SharePoint Sites**
4. Select **Embed Current User's Feed**
5. Position the web part below the default form
6. Click **Stop Editing**

### **Adding an Existing Feed**

You can embed any existing Pulse Feed on any page in SharePoint. For example, if you have a Pulse Page named "Human Resources" you can embed that conversation inside SharePoint. To embed an existing Feed to a SharePoint page, perform the following actions:

1. From the page of your SharePoint Site that you want to add a Pulse Conversation, click **Site Actions... Edit Page**
2. From the desired Web Part Zone click **Insert... Web Part**
3. In the **Categories** select **Pulse for SharePoint Sites**
4. Select **Embed an Existing Pulse Feed**
5. Position the web part below the default form
6. From the **Options** tab click **Web Part Properties**
7. In the **Miscellaneous** section input the URL to the existing feed. If you navigate to the Page in Pulse, copy the URL **EXCLUDING** the **/activities**
  - a. For example, <http://pulse.neudesic.com/streams/45094514-a510-4136-9912-6ccbafbb1ebb>
8. Click **Stop Editing**

## **Installing the SharePoint Extensions**

For information on installing SharePoint extensions into Neudesic Pulse please reference our [Installation Guide](#)

## Systems

### What are Systems?

Pulse understands that the computer systems within your company provide valuable information. For example, your CRM system might provide valuable information when an Opportunity closes. Pulse gives you the capability to have your CRM system “pulse” when this Opportunity closes thus giving your organization the ability to share conversations.

### What are Feeds?

Each of the systems created in Pulse have the ability to have one or more Feeds. Feeds are information that you want to show up as “pulses.” Pulse supports two very common formats in RSS and ATOM. For the purpose of explanation, do the following:

1. Open your web browser and navigate to <http://rss.msn.com/>
2. Click **MSN Money Latest Articles**

The resulting page is what’s known as RSS feed. You can use the URL located in the Address bar to create a Feed within Pulse.

While providing MSN articles in Pulse might seem useful, the real power of these Feeds is found in the systems within your company that provide RSS. If there is a system(CRM, ERP, Reporting) that you want inside Pulse, ask your system administrator “Does system xxx provide RSS feeds?” If it does, you’re in business.

### How do I setup a Twitter feed?

To setup a Twitter feed you simply need to get a URL to the RSS for a particular topic, user, or search term. For example, to setup a feed that pulls in tweets by a particular user, navigate to that user’s feed in Twitter. For example, <http://www.twitter.com/crmonline>. On this page you will see the RSS feed of CRMOnline’s tweets...Click that then copy the resulting URL. In this example, it is [http://twitter.com/statuses/user\\_timeline/14839512.rss](http://twitter.com/statuses/user_timeline/14839512.rss).

Now Administrators have what they need to set up a Twitter System feed:

1. Be logged in as an Administrator
2. Hover over the **Systems** drop down on the Navigation bar
3. Select **Create System**
4. Give you system a Name and Description
5. Edit the Privacy settings (if necessary)
6. Click **Create System**
7. Click **Add Feed**
8. Provide this Feed a Name and Description
9. Choose RSS 2.0 or ATOM 1.0 Feed as your source
10. In the **Source URL** section, paste the RSS URL you copied
11. Choose a Poll Period, by default we use 15 minutes

12. If you feel like this feed requires credentials, check the box.
13. Select **Create this Feed**