



**Pulse**  
**Quick Start Guide**

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# Overview

The document has the steps required to get Pulse installed and configured, it should only take you a few minutes to get you up and running.

Follow each of the steps below to ensure all of the features of Pulse are working correctly.

1. [Install Pulse](#)
2. [Connect to Pulse](#)
3. [Setup Wizard](#)
4. [Restart TM1 Instances](#)

## Pulse Help Center

This guide is just a starting point to get you up and running, for detailed documentation/videos on how to use Pulse and to connect with the rest of the Pulse community go to the **Pulse Help Center** at <http://help.pulsefortm1.com>

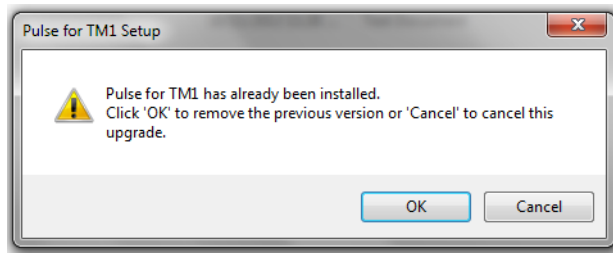
The **Pulse Help Center** should be your first place to look to solve any problems you have, we are constantly updating the site with new content describing new features and how to troubleshoot issues.

# Installation

## Uninstall

You need to remove existing versions of Pulse before installing a new version, this can be done 3 ways:

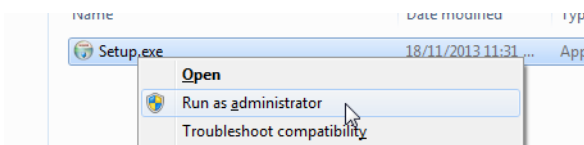
1. Control Panel --> Uninstall a Program
2. or, Program Files --> Pulse for TM1 --> Uninstall Pulse for TM1
3. or, The new installer will prompt you remove existing versions



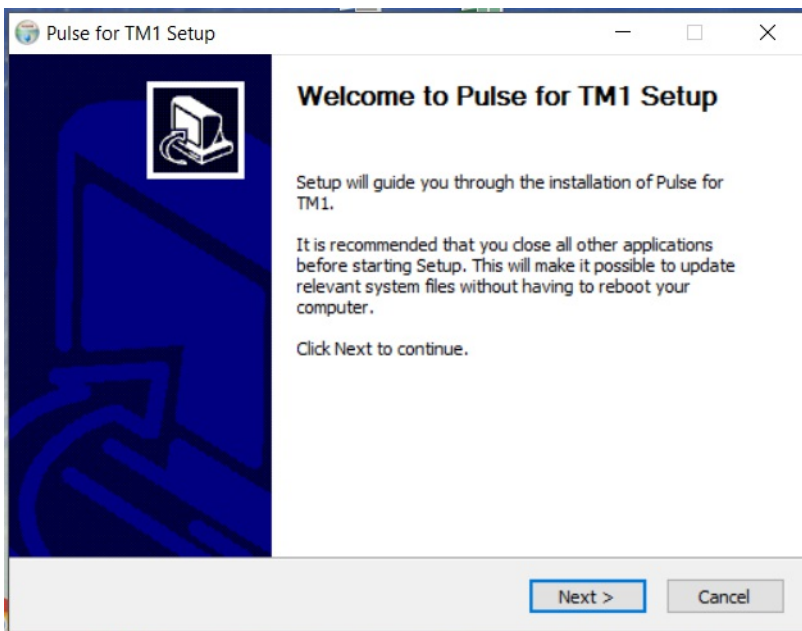
## Install New Version

Follow these steps to install a new version of Pulse, when upgrading from an existing installation you should install Pulse in the same location. The database files and configuration are not removed when Pulse is uninstalled.

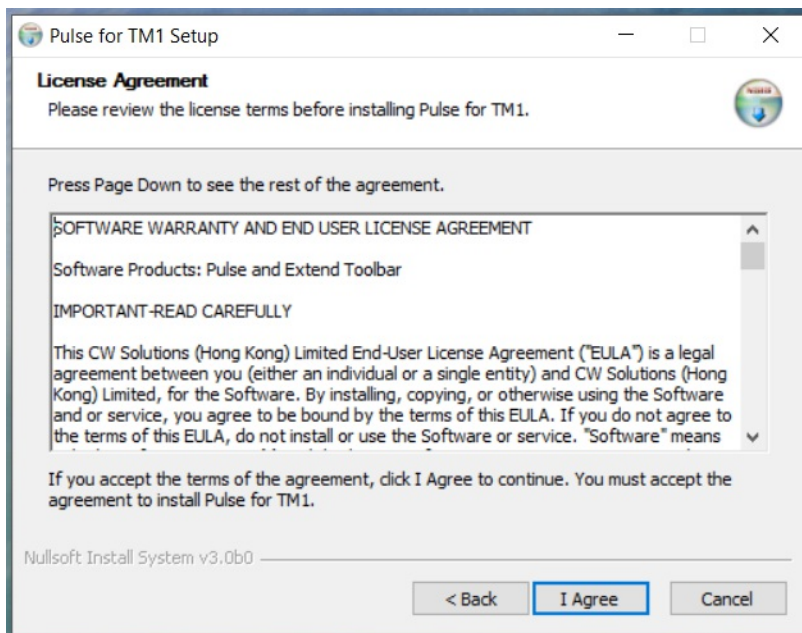
1. Run Setup.exe as Administrator:



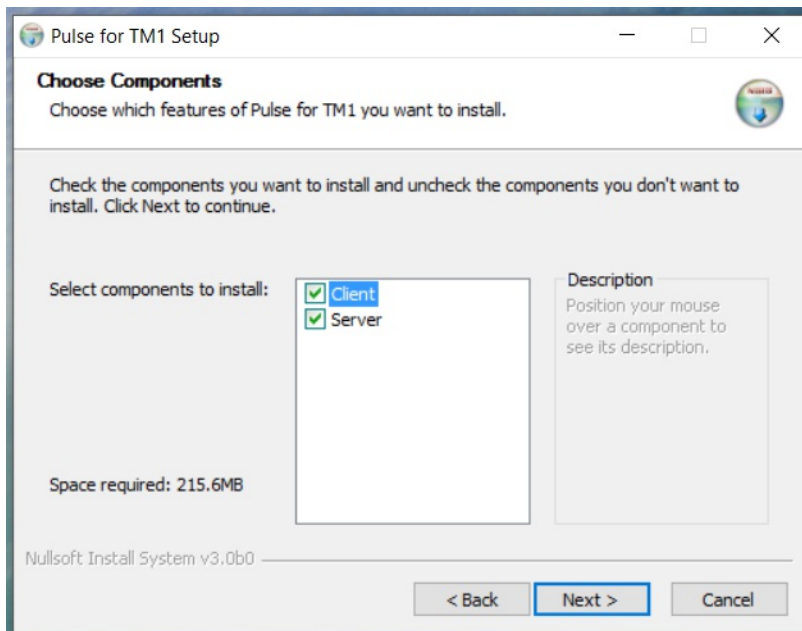
2. Click Next on the Welcome page:



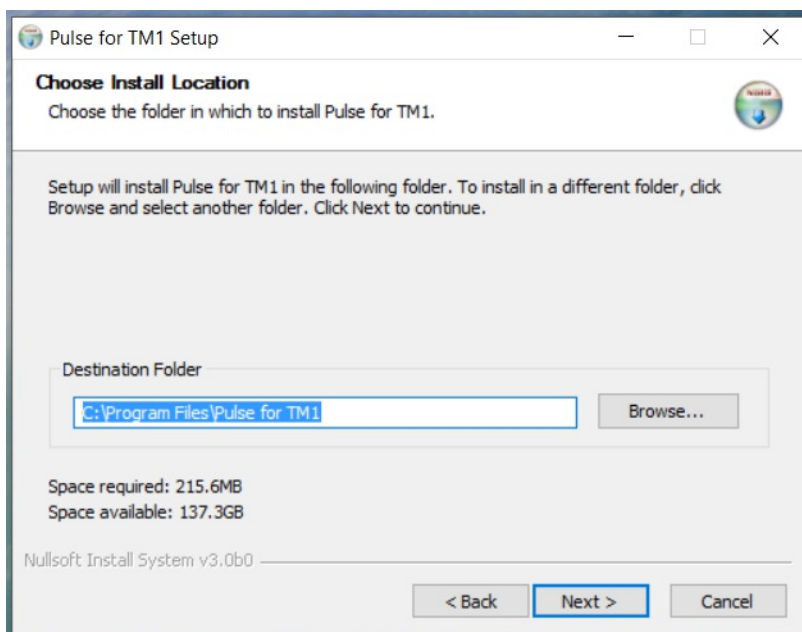
3. Accept the License Agreement:



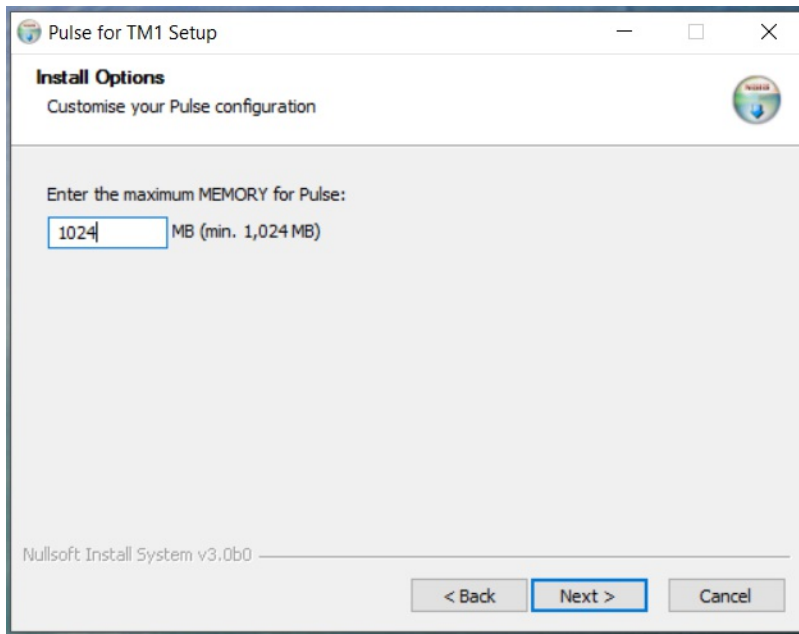
4. Select Client, Server or both. You should install both the client and server components on your TM1 server:



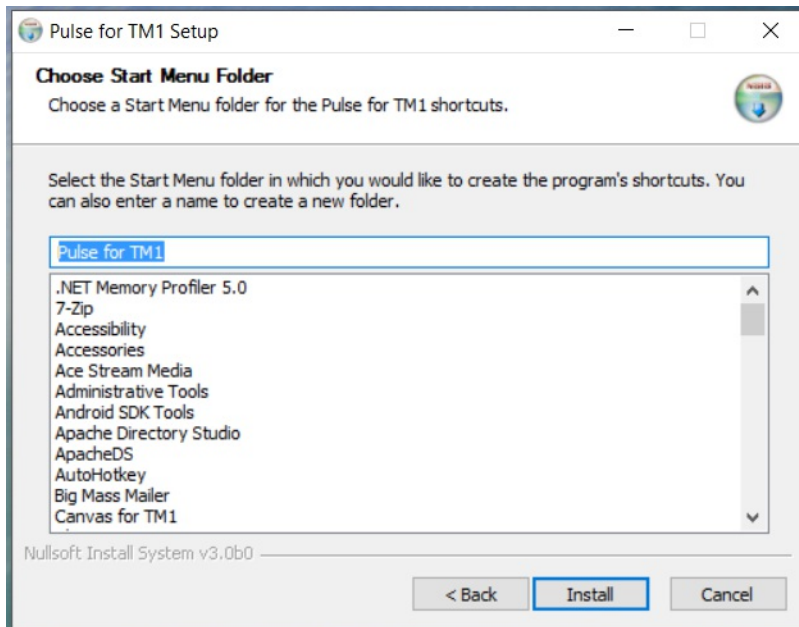
5. Select the install location for Pulse, all content, data, logs, etc is stored in this location. If you have limited space on your C drive this can be moved to another location. When upgrading from a previous version of Pulse ensure you install the new version in the same location as the previous install.



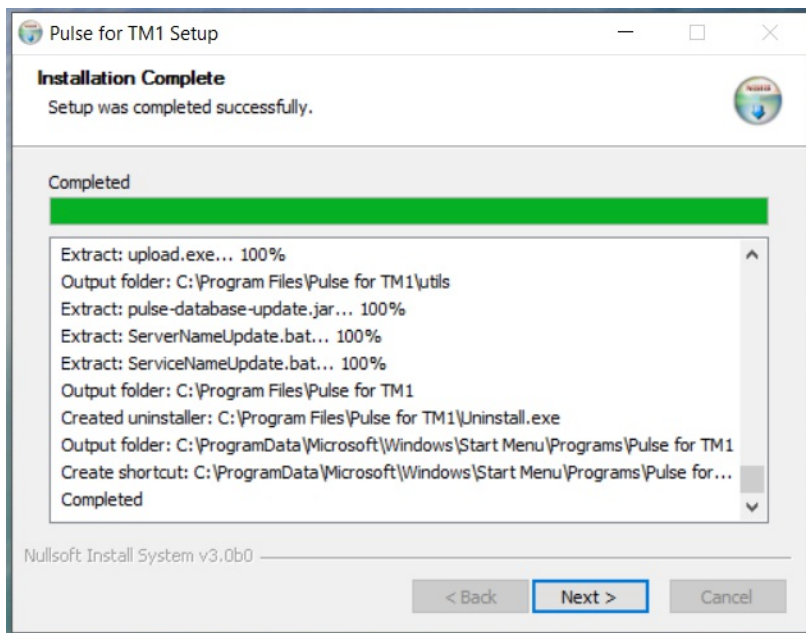
6. Enter the maximum amount of **memory** you want the Pulse Application Server to use. The default value is 1,024 MB which is appropriate for most installations. If you have many TM1 instances (10+) you may want to increase this value.



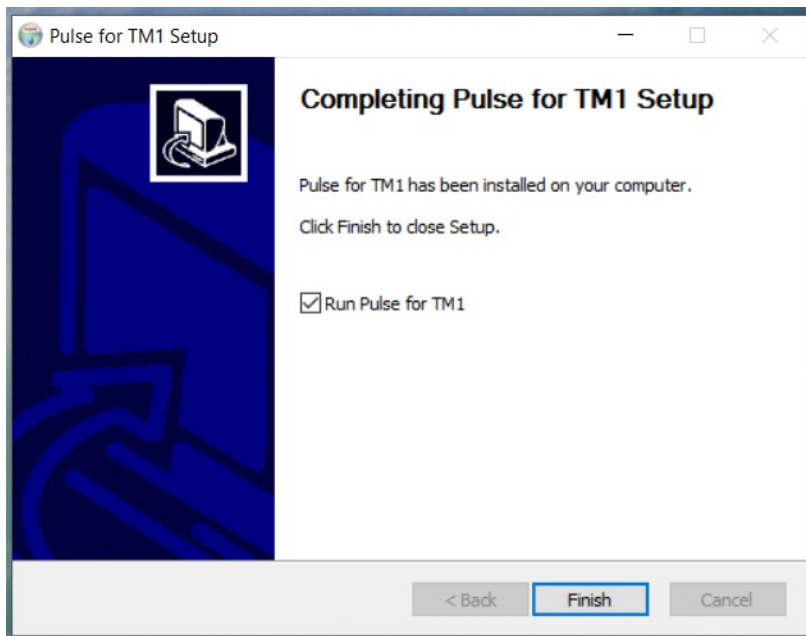
7. Enter the menu location for shortcuts and click **Install** (the installer will now install the components):



8. Click **Next** on the Complete screen:



9. Click on **Finish** to start the Pulse services and complete the installation:



## Restart TM1 Instances

When Pulse is installed it adds 8 Turbo Integrator processes to the data directory of each TM1 instance on the server, these processes are used to document your TM1 system. As part of the installation process you need to restart each instance so that these processes are loaded into TM1.

**NOTE:** The processes are required for documentation only so you can continue with the Pulse [Setup Wizard](#) and restart the instances (or server) after business hours. The documentation will be automatically updated at 1.45 am the following night.



# Connecting To Pulse

## Connect To Pulse

You can connect to Pulse using the website or the Windows client. The website is the central repository for Pulse, you can view all documentation, reports and monitor your TM1 servers. The Windows client main focus is live TM1 monitoring, if you are a TM1 administrator you should have it running on your desktop at all times. It is also used to update the settings for each of your TM1 servers and to add alerts.

### Connect to the Website

1. If you are logged into the TM1 server where Pulse is installed you can use the following address: <http://localhost:8099>, or you can use a secure connection using: <https://localhost:8093>

Note: You will get a warning message in your browser when using https, it is safe to ignore. For production systems you should replace the temporary SSL certificate with one signed by a certificate authority.

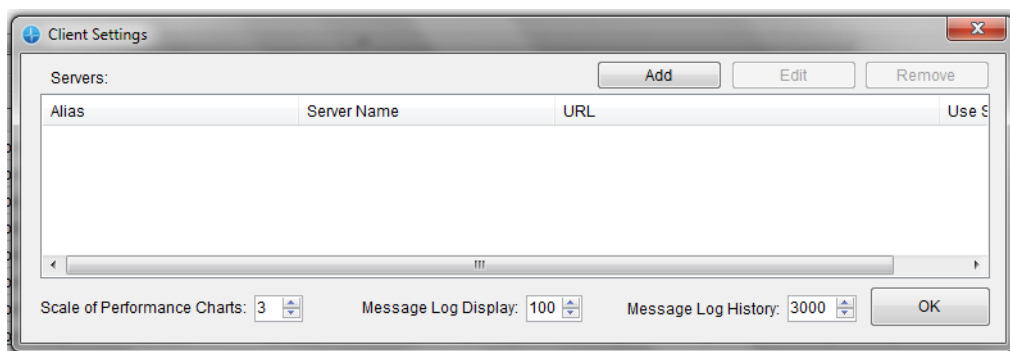
2. If you are connecting to the Pulse website from your PC or mobile device you should replace localhost with the name of your server, for example if your server is called COGNOS01 the address would be: <http://COGNOS01:8099>

### Using the Windows Client

By default the Windows client is installed on your TM1 server when you install Pulse, you can also install it on your PC using the same installer. When installed the Pulse client on your PC remember to **UNTICK** the server option when asked what components you want to install.

Once installed you can open the Pulse Windows client through the Start menu: All Programs --> Pulse for TM1 --> Pulse for TM1.

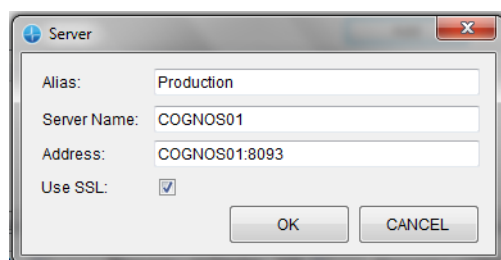
The first time you open the application you will be asked to add a new connection to a Pulse server, follow these steps:



1. Press the **Add** button on the Client Settings window.
2. Enter the following details:
  1. **Alias:** A name that describes the server, you can use anything you like, i.e. Production, Test, Dev, etc.
  2. **Server Name:** This is the name of the physical server and helps Pulse identify the source of the information from the server
  3. **Address:** The address is a combination of the physical server name, IP address, domain name or sub domain and also the port number separated by a colon (:). The default is port is **8099**, if you are using **SSL** the default port is **8093**.

**Examples:** SERVERNAME:8099, 192.168.1.78:8099, mydomain.com:8099, pulse.mydomain.com:8099

4. **Use SSL:** If your Pulse server has been configured to use SSL for the web server use must tick this box also and change the port number in the address field (default SSL port is 8093).



3. Press OK

## Default Admin User

Pulse has built-in security to ensure that only the appropriate people have access to view sensitive information and to update the Pulse database. The default credentials when you install Pulse are:

- **User Name:** admin
- **Password:** pulse

You should change this password after you log into Pulse for the first time. The password can be changed using the following steps:

1. Log into the Pulse web site
2. Click the LOGIN link in the top-right hand corner
3. Click on the Administrator account link in the top-right hand corner
4. Change the password
5. Click Save



# Setup Wizard

## Configuring Pulse

To get Pulse up and running you need to follow the steps of the **Setup Wizard**. Before you start the Setup Wizard you should have the following information ready:

- The location of the **64 bit TM1 bin directory** on the server.
- The **SMTP** server information for sending emails: server address and port number.

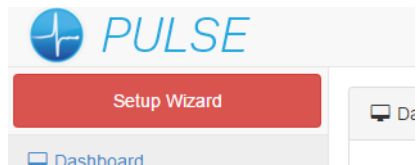
After you have gathered the information above you can now start the setup wizard:

Open the Pulse website, if you on the server you can use this address: <http://localhost:8099>, you can access the Pulse website from your desktop by replacing localhost with the server name.

**NOTE:** Pulse only supports **Internet Explorer 9** or later

### Step 1 - Start the Wizard

Click on the Setup Wizard button on the top left of the page



### Step 2 - Log into Pulse

Login into Pulse using the default credentials displayed on the login page

A screenshot of the Pulse login page. It has a light gray header with the text 'Sign In'. Below the header are two input fields: 'User Name' and 'Password'. Below these fields is a blue button with the text 'Login'. Under the 'Login' button, it says 'The default credentials are:'. Below that, it lists 'User Name: admin' and 'Password: pulse'.

### Step 3 - Validate the License File

Check to see if you have a valid license file, by default you will have a 14 day trial. Click **Next**.

## Welcome to the Pulse Setup Wizard

You have successfully installed Pulse for TM1, move through to the setup wizard to complete the configuration of Pulse.

### License

Valid

To update the license, contact Cubewise, copy the License.xml you receive to C:\Program Files\Pulse for TM1\server\ and restart the Pulse for TM1 Windows services.

### Step 4 - Change the Admin Password

Change the default Pulse admin user password, the password must be a strong password as shown in the message below. Click **Save** and **Next**.

User Name

admin

Password

Save

The password must have a minimum of 8 characters, 1 number, 1 upper case, 1 lower case and a special character (@#\$%&+=.!)\_)

## Step 5 - Set the TM1 Bin directory

Pulse uses the TM1 API to communicate with the server and therefore needs the location of the 64bit bin directory. Pulse will attempt to find this path using the common paths used by the TM1 installer, if you have installed TM1 in a different location you will need to enter the path manually. Determine the correct path where TM1 is installed, you can find this information by opening **Windows Task Manager** and viewing the properties of the **tm1sd.exe** process. Enter the path and click **Test**.

TM1 Bin Directory

Invalid

TEST

The location of the 64 bit TM1 bin directory, this is required for access to the TM1 API.

Standard location is:

C:\Program Files\ibm\cognos\tm1\_64\bin64

If the bin directory path is valid you will be able to progress to the next step. Click **Next**.

TM1 Bin Directory

C:\Program Files\ibm\cognos\tm1\_64\bin64

Valid

The location of the 64 bit TM1 bin directory, this is required for access to the TM1 API.









Standard location is:

C:\Program Files\ibm\cognos\tm1\_64\bin64

## Step 6 - Check the TM1 Instances

Pulse will display the TM1 instances (Windows Services) that have been found on the server. By default Pulse will display all Windows Services that have **tm1sd** as part of start up path for the service. You can display only Services that have been configured to **Automatic** by toggling the **Auto Start Services Only** option to **Yes**. Click **Next**.

## TM1 Instances Found

 CAM  
 CXMD  
 EMPTY  
 FLIGHTSTATS  
 PROD  
 TEST  
 TEST2  
 TESTA

### Auto Start Services Only:

☐ Yes ☒ No

Only display in Pulse the Windows services that are set to automatic start-up

Pulse requires TM1 to be running as a Windows service, to add/remove services use Cognos Configuration or tm1sd.exe from the command line (As Administrator).

### Add:

```
tm1sd.exe -install -n"NameOfService" -z"C:\Path To Directory  
With tm1s.cfg"
```

### Remove:

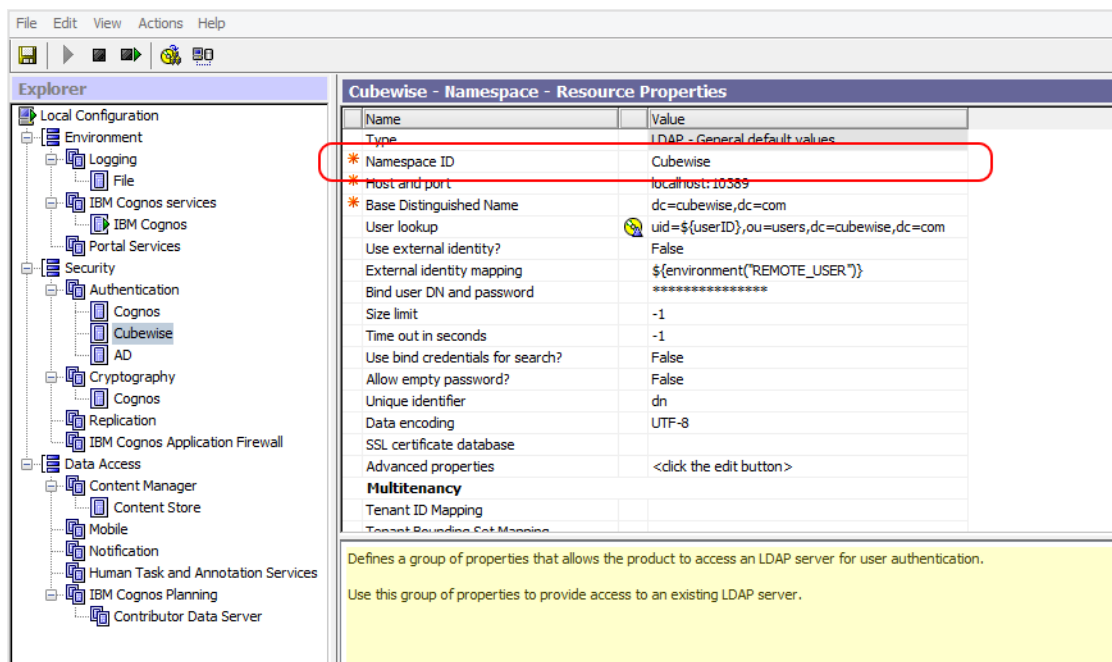
```
tm1sd.exe -remove -n"NameOfService"
```

## Step 7 - Set TM1 Credentials

Pulse requires TM1 credentials so it can log into each TM1 instance to extract information. On this screen you should provide the details for each TM1 instance, Pulse can only check the credentials if the TM1 instance is up and running. Enter the following details:

- **CAM Namespace:** This is only required when running IntegratedSecurityMode 4 or 5 (check the tm1s.cfg file) and is the **Namespace ID** (see image below) in Cognos Configuration. Leave **blank** for other security modes.
- **User Name:** The user name to login into TM1.
- **Password:** The password to login into TM1.

**NOTE:** The user needs to be part of the TM1 **Admin** group and if you are using an **Active Directory** account you should use a service account without an expiring password.



The screenshot shows the Cognos Configuration Explorer with the 'Cubewise - Namespace - Resource Properties' dialog open. The 'Namespace ID' property is highlighted with a red box. The dialog contains the following properties:

Name	Value
Type	LDAP - General default values
Namespace ID	Cubewise
Host and port	localhost:10389
Base Distinguished Name	dc=cubewise,dc=com
User lookup	uid=\${userID},ou=users,dc=cubewise,dc=com
Use external identity?	False
External identity mapping	\${environment("REMOTE_USER")}
Bind user DN and password	*****
Size limit	-1
Time out in seconds	-1
Use bind credentials for search?	False
Allow empty password?	False
Unique identifier	dn
Data encoding	UTF-8
SSL certificate database	
Advanced properties	<click the edit button>
<b>Multitenancy</b>	
Tenant ID Mapping	
Tenant Binding Set Mapping	

Defines a group of properties that allows the product to access an LDAP server for user authentication.  
Use this group of properties to provide access to an existing LDAP server.

Once you have entered the details click **Test**.

## TM1 Credentials

Enter the credentials for Pulse to connect to TM1 to extract documentation

### Export CAM Namespace (\* Optional)

Leave blank to use regular TM1 security

### Export User Name

Account must have administration rights on TM1 server

TEST

### CAM

#### Export CAM Namespace (\* Optional)

AD

#### Export User Name

tryan

#### Export Password

\*\*\*\*\*

If the credentials are correct you will be presented with a green box. Click **Next**.

## TM1 Credentials

Enter the credentials for Pulse to connect to TM1 to extract documentation

### Export CAM Namespace (\* Optional)

Leave blank to use regular TM1 security

### Export User Name

Account must have administration rights on TM1 server

TEST

### CAM

## Step 8 - SMTP Settings

Pulse requires access to your corporate **SMTP** server to send email alerts. On most corporate networks you only need to provide the **SMTP server** (or IP address) and a **Email From** address. The Email From address doesn't have to be a valid email address on most systems and can just be: [noreply@mycompany.com](mailto:noreply@mycompany.com) or [tm1support@mycompany.com](mailto:tm1support@mycompany.com)

Depending on how your SMTP server is configured you may need to allow "SMTP relay" from your TM1 server, change or turn of security software or provide authentication, speak to your System Administrator.

## Email Settings

SMTP Server:

SMTP Port:

SMTP SSL: ☐ Yes ☒ No

SMTP Email From:

SMTP User:

SMTP Password:

Test the SMTP settings by adding your email address to the **Sent Test To** box at the bottom and clicking **Test**. If the SMTP settings are correct the test will return Sent. Click **Next**.

## Step 9 - Notification Groups

Pulse can have one or more **Notification Groups**, these are assigned to Alerts and allow you to send emails to a group of people. Before finishing the wizard you need to add have at least one notification group. Multiple email addresses should be separated by a comma.

### Notification Group

Name

Email Addresses

Enter email address separated by a comma (,)

## Step 10 - Finish

Click **Save**. Congratulations Pulse is now up and running. Refreshing the page (**F5**) will remove Setup Wizard button from the menu.