



Telerik

TeamPulse

User Documentation

Get Started Guide for TeamPulse



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1 Overview

Telerik TeamPulse

TeamPulse helps to unleash the potential of your software teams, helping them to deliver better software – faster. By combining agile and lean best practices, TeamPulse helps your teams plan and measure results while continually improving your delivery process. The tool offers a set of highly visual and intuitive tools for managing user stories, planning, and scheduling while facilitating the involvement of your entire team in the decision-making process. TeamPulse provides a real-time view of the health and progress of your project and team.

TeamPulse helps to turn ideas into successful software projects by helping to minimize waste and friction along the way by uniting all team roles – from business users to developers.

TeamPulse was developed behind the following set of principles and assumptions:

- Backlog and plan definitions evolve rapidly
- Lots of work happens prior to construction
- Visualization is key to planning and backlog evolution
- User experience needs to
 - Be fluid, rich and clean
 - Target multiple platforms
 - Be extremely responsive
 - Be usable on small displays (e.g. Netbooks)

TeamPulse targets gathering and planning activities throughout your project by allowing you to:

- Capture, visualize, refine, manage, and publish software requirements in the form of user stories and personas
- Define project schedules and team capacities
- Schedule stories for delivery
- Analyze project for Agile best practices

Getting Started

1.1 The difference between Community Edition and Standard

- Community Edition: limit 1 project and of 5 users
- Standard Version: unlimited projects and users (dependent of the number of licenses purchased)

1.2 License Management

Activating your TeamPulse License

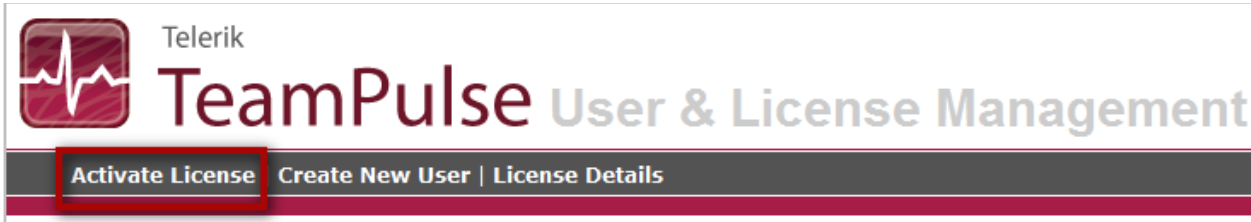
To activate your TeamPulse license, click on the “Activate License” link in the navigation menu.



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You can activate your TeamPulse license automatically or manually. Manual is only recommended if you do not have an internet connection available on the server where TeamPulse has been installed.

Automatic Activation

When you activate automatically, you will need to enter your Telerik username and password so TeamPulse can access the license in your account. Finish by clicking the “Activate License” button. An internet connection is required for automatic activation.

License Activation

☒ **Automatic Activation**

Choose automatic activation if you have a TeamPulse license in your Telerik account and you would like to use it for activation. **Internet connection is required.**

Enter your Telerik.com credentials and press the Activate button to complete Activation.

User Name:

Password:

Automatic activation

Manual Activation

Manual activation is a two-step process. First you must acquire an activation code from your Telerik account, and then you must submit that code into the TeamPulse User Management site to complete the process.

To acquire your activation code, copy the Machine ID value displayed in the Manual Activation section of the TeamPulse User Management site.



Manual Activation

Choose manual activation if an internet connection is not available on this machine.

Step 1: Place the **Machine ID** listed below into the [Manual Registration Form](#) on the Telerik website.

Machine ID: 6A5FEBF185DFAF1FBAB

Step 2: Paste the activation code you receive from the registration form into the field below and press the Activate button to complete the manual activation process.

Then navigate a browser to the Manual Registration Form on the Telerik.com web site (<http://www.telerik.com/team-productivity-tools/account/license-keys.aspx>) and follow the instructions to generate an activation code, entering the Machine ID when requested.

Once you have your activation code from Telerik, all you need to do is select “Manual Activation” and enter your code into the activation field. Finish by clicking the “Activate License” button.

Manual Activation

Choose manual activation if an internet connection is not available on this machine.

Step 1: Place the **Machine ID** listed below into the [Manual Registration Form](#) on the Telerik website.

Machine ID: 6A5FEBF185DFAF1FBAB

Step 2: Paste the activation code you receive from the registration form into the field below and press the Activate button to complete the manual activation process.

Manual activation



Deactivate your TeamPulse license

To begin the process of deactivating your TeamPulse license, click on the “Deactivate License” link in the navigation menu.



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TeamPulse User & License Management

Deactivate License | Create New User | License Details

You will be taken to the deactivation page where you can automatically or manually deactivate your license.

License Deactivation

Are you sure you want to deactivate this TeamPulse instance?

☒ **Automatic Deactivation**

Choose automatic deactivation if you wish to free your TeamPulse license from use on the currently installed server. **Internet connection is required.**

☐ **Manual Deactivation**

Choose manual deactivation if no internet connection is available on the server on which TeamPulse is installed. This will allow you to free the server's license through the use of another computer which can connect to telerik.com.

Deactivate

Deactivation Screen

Automatic Deactivation

To automatically deactivate TeamPulse, select the “Automatic Deactivation” option and click the deactivate button. An internet connection is required for automatic deactivation.

Manual Deactivation

Choose manual deactivation if no internet connection is available on the server on which TeamPulse is installed. We recommend that prior to deactivating you should consider saving the deactivation code to an external file, especially if you have not yet successfully submitted the manual deactivation form.

Deactivation in 3 steps:

1. Make a copy of your deactivation code
2. Submit the deactivation code using the Telerik manual deactivation form (<http://www.telerik.com/team-productivity-tools/account/license-keys/manual-deactivation.aspx>)
3. Click the “Deactivate” button in TeamPulse



Manual Deactivation

Choose manual deactivation if no internet connection is available on the server on which TeamPulse is installed. This will allow you to free the server's license through the use of another computer which can connect to Telerik.com.

Step 1: Submit the **Deactivation Code** listed below into the [Manual Deactivation Form](#) on the Telerik website.

```
o1B0nve+F9k1zWPfEu0tHTa4lyPJndO1tCBWX6UCHXyCsiyk+I7YjHoi/aDS8B
ID3S5Qv/5sg0/Qx79V//VKs2mgZIEt1PPkCS2Y94KjWWBNPEGKLEQVnLhyOd6R
2ckpVMTkBIeUf1kJgzxwTmBdI607V9oqw1FRtAa8euVUjG7vpWY1U5S/wcwbKL
XmKhunT2x+oSPIhUcoVJU+tDt04BFAQ73FdLbPy+wSCdS2mNc5qKNd5YNYT3Ou
uzpmh+HKvqPrA/eV69ghNkrDPmkfgTTOYm2JoZ11JukCuKUGYVm5VY2mFz+doN
/k1V8hqxxCipjhsI8MpFQSl8JhpUL2rg4u9BQiTycZYcD9FAx6pJFQsHN5HLd/
f6mVxqZ1HX8M/CXCWBCR8uI1ZsaGQdQcc8OoNzA/OLa72rrrH7GuYLVNtQZj6r
TIXJAcfyi4wB3BPfEcHdJL9CdRNAQAA
```

Warning! Prior to hitting Deactivate you should consider saving the deactivation code to an external file (especially if you have not yet successfully submitted the Manual Deactivation Form).

Step 2: Upon successful submission of the deactivation code above, click the Deactivate button below to remove the license from your server.

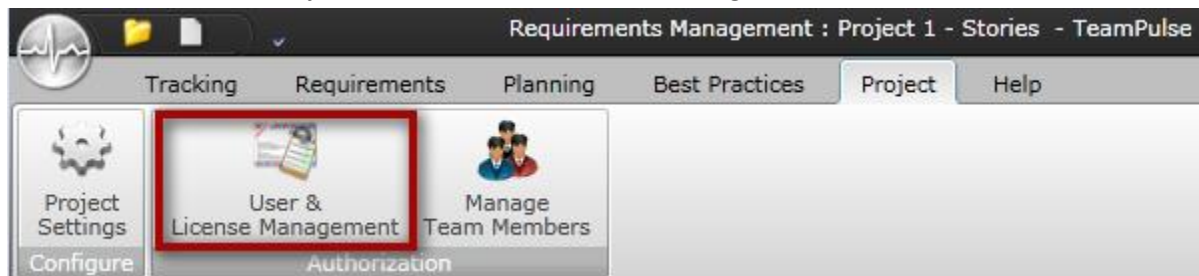
Deactivate

Deactivation Code

1.3 User and License Management web site

There are 2 ways to access the User & License Management web site.

1. **Team Pulse Ribbon** – Project Tab > the User & License Management





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2. Project Settings screen

	First Name	Last Name	Domain Username
☒	Jim	Samquanch	MYDOMAIN\jims
☐	Dave	Fillmore	MYDOMAIN\davef
☐	Greg	Flannery	MYDOMAIN\gregf
☐	Joel	Deadwood	MYDOMAIN\joeld

Either option will launch the “User & License Management” web site.

ID	Domain	Username	First Name	Last Name	Email	Status
1	MYDOMAIN	jimf	Jim	Flannery	jimbo@email.com	Enabled
2	MYDOMAIN	daveb	Dave	Brown	daveB@email.com	Enabled
3	MYDOMAIN	gregb	Greg	Blue	gregb@email.com	Enabled
4	MYDOMAIN	joelb	Joel	Banner	joelb@email.com	Enabled
5	MYDOMAIN	yassers	Yasser	Smith	yassers@email.com	Enabled

[User & License Management site](#)

1.4 User Management

Create a user

If you want to add a new user, click on the “Create New User” link in the navigation menu.

You will be taken to the Create New User page. Fill in all of the fields, user picture is optional, and click the “Create” button. The user will be created and a TeamPulse license will be assigned to them.



Create New User

User Information

First Name

Last Name

Email

Enabled ☒

Access Information

Domain

Username

User Picture

Choose File

No file chosen

Upload

Create

[Create New User page](#)

Note: If no licenses are available the user will be created but marked as disabled. You will not be able to enable the user until you add more licenses to TeamPulse or you reassign another license to the newly created user.

e User & License Management

TeamPulse Standard Edition
Seats Licensed: 1000
Seats Used: 20
Seats Available: 980

r | License Details

[TeamPulse available license information](#)

Delete a user

If you want to delete a user you can click on the “X” for their row. You will be taken to a confirmation page where you will complete the deletion.



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TeamPulse User & License Mana

[Activate License](#) | [Create New User](#) | [License Details](#)

	ID	Domain	Username	First Name	Last Name	Email	Status	
		1	MYDOMAIN	jimf	Jim	Flannery	jimbo@email.com	Enabled
		2	MYDOMAIN	daveb	Dave	Brown	daveB@email.com	Enabled
		3	MYDOMAIN	gregb	Greg	Blue	gregb@email.com	Enabled
		4	MYDOMAIN	joelb	Joel	Banner	joelb@email.com	Enabled
		5	MYDOMAIN	yassers	Yasser	Smith	yassers@email.com	Enabled

[Delete a user](#)

Edit a user

If you want to edit a user you can click on the pencil image for their row. You will be taken to the edit user page where you can modify information, and enable/disable the account.



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TeamPulse User & License Man

[Deactivate License](#) | [Create New User](#) | [License Details](#)

	ID	Domain	Username	First Name	Last Name	Email	Status	
		1	MYDOMAIN	jims	Jim	Samquanch	jim@email.com	Enabled
		2	MYDOMAIN	davef	Dave	Fillmore	daveh@email.com	Enabled
		3	MYDOMAIN	gregf	Greg	Flannery	gregf@email.com	Enabled
		4	MYDOMAIN	joeld	Joel	Deadwood	joeld@email.com	Enabled

[Edit a user](#)