

CA Clarity™ Agile

Implementation Guide

Release 13.3.00



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Chapter 1: **Install and Configure CA Clarity™ Agile**

If you are installing CA Clarity™ Agile for the first time into an existing Salesforce.com organization, complete the instructions in the following sections.

This section contains the following topics:

[Prerequisites](#) (see page 7)

[Create User Profiles](#) (see page 7)

[Install the New Package](#) (see page 8)

[Configure CA Clarity™ Agile](#) (see page 10)

[Configure Privileges for Charts and Reports on the Public Dashboard](#) (see page 11)

Prerequisites

Before you install CA Clarity™ Agile, review the following points:

1. If you do not have a Salesforce.com organization, contact CA Support for the following information:
 - CA Clarity Agile URL
 - Username and login
 - Password
2. Verify that you have at least one active license of Salesforce Platform. If not, contact Salesforce.com support or your CA Technologies sales representative. Without a Salesforce Platform license, you do not have the Standard Platform profile that is required to complete the installation.

Create User Profiles

Before installing CA Clarity™ Agile, ensure that you have the required user profiles. The following profiles are required:

- Agile Super-User
- Agile User
- Requirements Super-User
- Requirements User
- Agile/Requirements Super-User
- Agile/Requirements User

Follow these steps:

1. Log in to your Salesforce.com organization.
2. Click the Setup link to go to the Personal Setup page on Salesforce.com.
3. Select Company Profile from the Administration Setup menu and go to Company Information.
The Company Information page appears.
4. Scroll to the User Licenses section and verify that you have at least one Salesforce Platform license active. If you do not have at least one Salesforce Platform license active, contact Salesforce.com support.
5. Select Manage Users from the Administration Setup menu and go to Profiles.
The User Profiles page appears.
6. Create the required profiles specified earlier copying the Standard Platform user profile. The Standard Platform user profile is available only if you have at least one Salesforce Platform license active.
7. Enable Chatter by completing the following steps:
 - a. In the App Setup menu, click and expand Customize, click and expand Chatter, then click Settings.
The Chatter Settings page appears.
 - b. Click Edit.
 - c. In the Chatter Settings section, select the Enable check box.
 - d. Click Save.
8. Log out of your Salesforce.com organization.

Install the New Package

Before you start the installation, determine whether to install the package on the production environment or the test environment.

In the following steps, you log in to the installation site and install the package.

The table shows the access levels for each profile.

User Profile	Access Level
Agile Super-User	Agile Super-User
Agile User	Agile User
Requirements Super-User	Requirements Super-User

Requirements User	Requirements User
Agile/Requirements Super-User	Agile/Requirements Super-User
Agile/Requirements User	Agile/Requirements User

Follow these steps:

1. Log in as the system administrator to one of the following URLs:

Production environment:

`https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000K27T`

Test environment:

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000K27T`

2. Verify the following information:

Version Name

CA Clarity Agile 13.3

Version Number

5.0

Publisher

CA Technologies

3. Click Continue.

The Approve Package API Access step page appears.

4. Click Next.

The Choose security level page appears.

5. Select the Security Settings option to set user access by profile.
6. Set the access levels for each profiles as mentioned in the preceding table.
7. Click Next.
8. Click Install.

The Processing page appears indicating that your request is in process. The installation can take over 30 minutes, depending on the current load for the Force.com platform.

When the installation completes, Salesforce.com sends an 'Install Successful' email to the email address that you used to log in.

Configure CA Clarity™ Agile

After you install the new package, the package is automatically deployed. Verify that the package is the correct version and complete the CA Clarity™ Agile configuration.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. From the home page, click Setup.
The Personal Setup page opens in Salesforce.com.
3. **Verify the Installed Package.**
 - Select Installed Packages from the App Setup menu, and verify that package CA Clarity Agile, Version 5.0 is installed.
4. **Configure User Profiles.**
 - Select Manage Users from the Administration Setup menu and go to Profiles.
The User Profiles page appears.
 - Click the Name link for a new profile you created when you were preparing to install CA Clarity™ Agile.
 - Scroll to the Custom App Settings section and select the Default option for CA Clarity™ Agile.
 - Save your changes.
 - Repeat the above steps to set CA Clarity™ Agile as the default app for each new profile you created. See Create User Profiles.
 - Edit the Salesforce.com user profiles to provide appropriate read or write permissions to the CA Clarity™ Agile objects. The profiles also need permission to execute the Visualforce pages that make up the application. Use the profiles that you created at the start of the install process to determine what sets of permissions are needed. Copy over the necessary settings. See the Force.com platform documentation for more information.
5. Enter the following URL in the address bar of your browser window to go to the CA Clarity™ Agile Home page and automatically schedule your jobs:

`https://ca-agile.naxx.visual.force.com/apex/tophome`

xx

The instance number of the organization where CA Clarity™ Agile is installed.

The jobs are rescheduled automatically.

Configure Privileges for Charts and Reports on the Public Dashboard

The public dashboards require configuration of all the profiles. The system administrator must configure profiles so that users can view the charts and reports available from the dashboard.

Follow these steps:

1. Log in as a system administrator and click Setup.
2. Click Dashboards and open CA Clarity™ Agile Dashboard.
3. Click Edit.
A page opens with options to edit the dashboard.
4. Type * (star) in the *View dashboard as* field to filter all the active users. Select a user ID without administrator privileges.
5. Click the down arrow next to the View Dashboard field, and select Run as logged-in user.
6. Click Ok, and click Save.
7. Configure the Salesforce Platform profiles as shown in the tables that follow these steps.
 - a. Return to the Setup page and expand Manage Users and Profiles.
 - b. Click the name of a profile, and click Edit.
 - Agile/Requirements Super-User
 - Agile/Requirements User
 - Agile Super-User
 - Agile User
 - Requirements Super-User
 - Requirements User
 - c. Scroll to Administrative Permissions and select, or clear, the permissions that are based on the values in the following table.
 - d. Scroll to the General User Permissions and select, or clear, the permissions that are based on the values in the following table.
 - e. Click Save, and repeat these steps for each required profile.

When you assign a profile to a user ID, the user receives permission to access charts and reports on the public dashboard. Based on the privileges that are associated with the profile the user can perform actions like view, modify, or clone.

Permission Type	Super-User	Regular User
Administration		
Manage Public Reports	Y	N
Manage Dashboards	Y	Y
Manage Dynamic Dashboard	Y	Y
General User		
Create and customize report	Y	Y
Report Builder	Y	Y
Run Reports	Y	Y
Export Reports	Y	Y
Drag-and-Drop Dashboard Builder	Y	Y
View My Team's Dashboards	Y	Y

Chapter 2: Upgrade Information

This section contains the following topics:

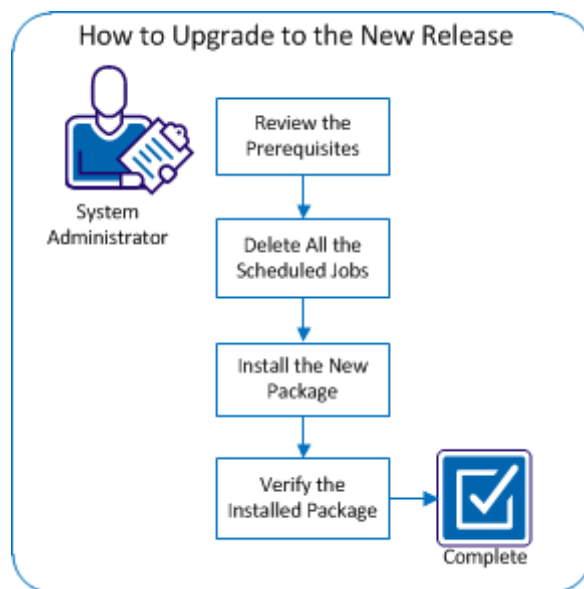
[Upgrade to the New Release of CA Clarity™ Agile](#) (see page 13)

[Upgrade from Previous Releases](#) (see page 16)

Upgrade to the New Release of CA Clarity™ Agile

This scenario demonstrates how a Salesforce.com user with system administrator privileges upgrades to the new release of CA Clarity™ Agile. In this scenario, you upgrade to Release 13.3.00. The upgrade includes installing and deploying the package.

The following graphic describes how the system administrator upgrades CA Clarity™ Agile to the new release.



To upgrade CA Clarity™ Agile, perform these steps:

1. [Review the prerequisites](#) (see page 14).
2. [Delete all scheduled jobs](#) (see page 14).
3. [Install the new package](#) (see page 14).
4. [Verify the installed package](#) (see page 16).

Review the Prerequisites

To help ensure that you can successfully upgrade to the new release, review the following prerequisites.

- Upgrade in sequential order, without skipping releases. For example, if you currently have Spring 2013 installed, upgrade to Spring 2013 SP1 before upgrading to Release 13.3.00.
- You have the product license for CA Clarity™ Agile.

Note: If you integrate with other products such as CA Clarity™ PPM, upgrade CA Clarity™ Agile and the Add-ins at the same time.

Delete All Scheduled Jobs in Salesforce

Before you upgrade to the new release, delete all scheduled jobs in Salesforce. Deleting scheduled jobs ensures that you successfully upgrade the product.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. Click the Setup link.
The Personal Setup page appears.
3. In the Administration Setup section, expand Monitoring, Scheduled Jobs.
4. Delete the following jobs if they exist:
 - Chart data point generation for User Story Completion Status
 - Daily chart data point generation for Release
 - Daily chart data point generation for Requirement
 - Daily chart data point generation for Sprint
 - Daily update External Id for all objects
 - Requirements trend calculation
5. Return to the Personal Setup page.
You are prepared to install the new package.

Install the New Package

Before you install, determine whether to install the package on the production or test environment.

The following table lists the access levels for each profile.

User Profile	Access Level
Agile Super-User	Agile Super-User
Agile User	Agile User
Requirements Super-User	Requirements Super-User
Requirements User	Requirements User
Agile/Requirements Super-User	Agile/Requirements Super-User
Agile/Requirements User	Agile/Requirements User

Follow these steps:

1. Log in as a system administrator to one of the following URLs:

Production environment

`https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000K27T`

Test environment

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000K27T`

2. Verify the following information:

Version Name

CA Clarity Agile 13.3

Version Number

5.0

Publisher

CA Technologies

3. Click Continue.

The Handle Component Name Conflicts page appears.

Note: This page appears only for an upgrade. For fresh installation, the process starts from the Approve Package API Access page.

4. Select Block installation and list conflicts, and click Next.

The Approve Package API Access page appears.

5. Click Next.

The Choose security level page appears.

6. Select the Select Security Settings option and set the user access by profile.
7. Set the access levels for each profile as specified in the preceding table, and click Next.

The Install Package page appears.

8. Click Install.

The Processing page appears indicating that your request is in process. The installation can take over 30 minutes, depending on the current load for the Force.com platform.

When the installation completes, you will receive an 'Install Successful' email from Salesforce.com to the email address that you used to log in. If your email server blocks email from SFDC, check the Junk email folder.

Verify the Installed Package

After you install the new package, the package is automatically deployed. Verify that the package is the correct version.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. From the home page, click Setup.
The Personal Setup page opens in Salesforce.com.
3. Select Installed Packages from the App Setup menu.
4. Verify that package CA Clarity Agile, Version 5.0 is installed.

Note: The date of the installation is not updated. The original date of the installation appears.

Upgrade from Previous Releases

See the CA Clarity™ Agile bookshelves available on <http://support.ca.com> for detailed information on upgrading from previous releases. Login and from the product page locate the bookshelf for the release.

Chapter 3: CA Clarity™ Agile Add-ins

The CA Clarity™ Agile add-in files are included in the CA Clarity™ PPM Release 13.3.00 installation. Any updates to add-ins are delivered with CA Clarity™ PPM updates. If you are upgrading the add-ins for CA Clarity™ PPM Release 13.1 or earlier releases, consider upgrading CA Clarity™ Agile and the add-ins at the same time. For more information about integrating CA Clarity™ Agile with CA Clarity™ PPM, see the *Integration Guide*.

Appendix A: CA Clarity™ Agile Release Package Information

Release/Version Name	Version Number	Production Environment	Test Environment
Release 13.3	5.0	https://login.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000K27T	https://test.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000K27T
Spring 2013 SP1	4.5	https://login.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000K0NE	https://test.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000K0NE
Spring 2013	4.4	https://login.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000Jyre	https://test.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000Jyre
Winter 2013 SP1	4.3	https://login.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000JyHr	https://test.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000JyHr
Winter 2013	4.1	https://login.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000Jwwk	https://test.salesforce.com/packaging/installPackage.aspx?p0=04tA00000000Jwwk