

# CA Clarity Agile

## Implementation Guide

Spring 2013



This Documentation, which includes embedded help systems and electronically distributed materials, (hereinafter referred to as the "Documentation") is for your informational purposes only and is subject to change or withdrawal by CA at any time.

This Documentation may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of CA. This Documentation is confidential and proprietary information of CA and may not be disclosed by you or used for any purpose other than as may be permitted in (i) a separate agreement between you and CA governing your use of the CA software to which the Documentation relates; or (ii) a separate confidentiality agreement between you and CA.

Notwithstanding the foregoing, if you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all CA copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to CA that all copies and partial copies of the Documentation have been returned to CA or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, CA PROVIDES THIS DOCUMENTATION "AS IS" WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL CA BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF CA IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is CA.

Provided with "Restricted Rights." Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2013 CA. All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

## CA Technologies Product References

This documentation set references the following CA Technologies brands and products:

- CA Clarity™ Agile
- CA Clarity PPM
- CA Clarity™ Ideation
- CA Software Change Manager

## Contact CA Technologies

### Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information that you need for your Home Office, Small Business, and Enterprise CA Technologies products. At <http://ca.com/support>, you can access the following resources:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

### Providing Feedback About Product Documentation

If you have comments or questions about CA Technologies product documentation, you can send a message to [techpubs@ca.com](mailto:techpubs@ca.com).

To provide feedback about CA Technologies product documentation, complete our short customer survey which is available on the CA Support website at <http://ca.com/docs>.



# Contents

---

Chapter 1: Introduction	7
Chapter 2: Install and Configure CA Clarity Agile	9
Prepare to Install CA Clarity Agile	9
Install the New Package	10
Verify the Installed Package	12
Configure CA Clarity Agile	12
Configure Existing Profiles	13
Configure Privileges for Charts and Reports on the Public Dashboard	13
Chapter 3: Upgrade from Previous Releases	15
Overview: Upgrade to the New Release of CA Clarity Agile	15
Review the Prerequisites	17
Delete All Scheduled Jobs in Salesforce	17
Update the Installed Application Name	18
Enable Feed Tracking	18
Install the New Package	19
Verify the Installed Package	20
Update the Reports and Dashboards	21
Run the Upgrade Jobs	22
How to Upgrade to Winter 2013 Service Pack 1 from Winter 2013	23
Delete All Scheduled Jobs	23
Install the New Package	24
How to Upgrade to Winter 2013 from Summer 2012 Service Pack 1	26
Delete All Scheduled Jobs in Salesforce	26
Update the Installed Package Name	27
Update the User Profile Names	27
Install the New Package	28
Verify the Installed Package	30
Specify the Vision Licenses	30
Update the User Profiles	31
Update the Reports and Dashboards	32
How to Upgrade to Summer 2012 Service Pack 1 from Summer 2012	33
Delete All Scheduled Jobs in Salesforce	33
Install the New Package	34
Verify the Installed Package	36

---

Specify the Vision Licenses.....	36
Update User Profiles .....	37
Run the Upgrade Jobs .....	39
How to Upgrade to Summer 2012 from Spring 2012 Service Pack 1 .....	40
Delete All Scheduled Jobs in Salesforce .....	40
Install the New Package .....	41
Verify the Installed Package .....	43
Specify the Vision Licenses.....	43
Update User Profiles .....	44
Run the Upgrade Jobs .....	46
 Chapter 4: CA Clarity Agile Add-ins	 47

# Chapter 1: Introduction

---

Welcome to CA Clarity Agile. The information that this document provides can help you get started with this new release and guides you through the following tasks:

- [Install and Configure CA Clarity Agile](#) (see page 9)
- [Upgrade from Previous Releases](#) (see page 15)
- [CA Clarity Agile Add-ins](#) (see page 47)



# Chapter 2: 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.

If you are using CA Clarity Agile for the first time and you do not have a Salesforce.com organization, contact CA Support for CA Clarity Agile URL and login credentials.

**Note:** When installing into an existing Salesforce.com organization, verify that you have at least one Salesforce Platform license active. If not, discontinue the installation and 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.

This section contains the following topics:

[Prepare to Install CA Clarity Agile](#) (see page 9)

[Install the New Package](#) (see page 10)

[Verify the Installed Package](#) (see page 12)

[Configure CA Clarity Agile](#) (see page 12)

## Prepare to Install CA Clarity Agile

Before you install the product, verify that you have an active license for Salesforce.com and create the required user profiles.

The following profiles are required to install CA Clarity Agile:

- 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=04tA00000000Jyre`

**Test environment:**

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000Jyre`

2. Verify the following information:

**Version Name**

Spring 2013

**Version Number**

4.4

**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.

## 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 4.4 is installed.

## Configure CA Clarity Agile

After the license is specified, complete the following steps to configure CA Clarity Agile.

**Follow these steps:**

1. Log in to CA Clarity Agile with the URL:  
<https://cavision.cloudforce.com>
2. Click the Setup menu.  
The Personal Setup page appears.
3. Select Manage Users from the Administration Setup menu and go to Profiles.  
The User Profiles page appears.
4. Click the Name link for a new profile you created when you were preparing to install CA Clarity Agile.  
The profile page appears.
5. Scroll to the Custom App Settings section and select the Default option for CA Clarity Agile.
6. Save your changes.
7. Repeat the steps 3 through 5 to set CA Clarity Agile as the default app for each new profile you created.

8. 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 Existing 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.

## 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
<b>Administration</b>		
Manage Public Reports	Y	N
Manage Dashboards	Y	Y
Manage Dynamic Dashboard	Y	Y
<b>General User</b>		
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 3: Upgrade from Previous Releases

---

Use the information in the following sections to upgrade to the current release.

When you upgrade from previous releases to the new release, consider the following items:

- If you integrate with other products such as CA Clarity PPM, upgrade CA Clarity Agile and the Add-ins at the same time.
- Upgrade in sequential order, without skipping releases. For example, if you currently have Winter 2013 installed, upgrade to Winter 2013 SP1 before upgrading to Spring 2013.

This section contains the following topics:

[Overview: Upgrade to the New Release of CA Clarity Agile](#) (see page 15)

[How to Upgrade to Winter 2013 Service Pack 1 from Winter 2013](#) (see page 23)

[How to Upgrade to Winter 2013 from Summer 2012 Service Pack 1](#) (see page 26)

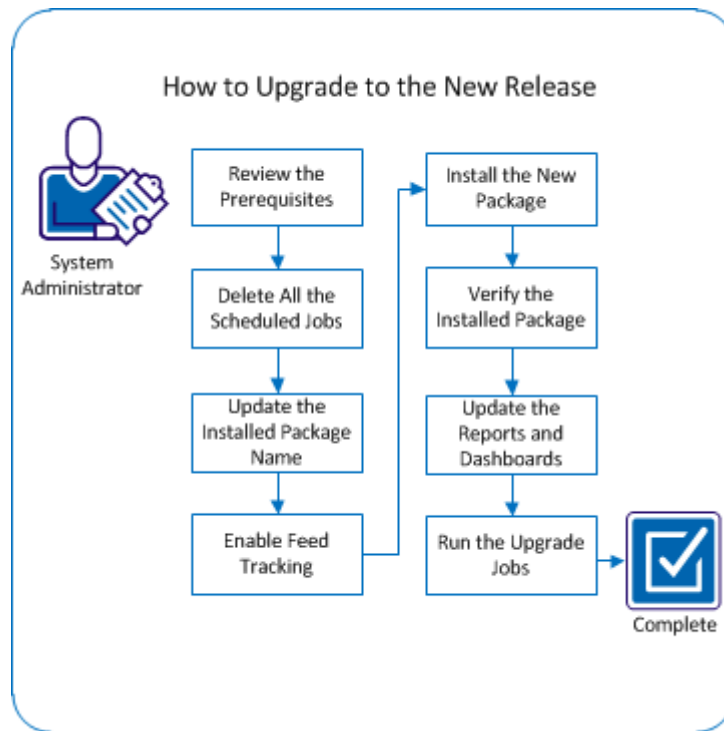
[How to Upgrade to Summer 2012 Service Pack 1 from Summer 2012](#) (see page 33)

[How to Upgrade to Summer 2012 from Spring 2012 Service Pack 1](#) (see page 40)

## Overview: 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 Spring 2013. 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 17).
2. [Delete all scheduled jobs](#) (see page 17).
3. [Update the installed package name](#) (see page 18).
4. [Enable Feed Tracking](#) (see page 18).
5. [Install the new package](#) (see page 19).
6. [Verify the installed package](#) (see page 12).
7. [Update the reports and dashboards](#) (see page 21).
8. [Run the upgrade jobs](#) (see page 22).

## Review the Prerequisites

Review the following prerequisites to help ensure that you can successfully upgrade to the new release.

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

## 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.

## Update the Installed Application Name

Before upgrading, modify the application name to match the new application name.

**Follow these steps:**

1. Log in to Salesforce.com as the system administrator.
2. Click Setup from the CA Clarity Agile home page.  
The Personal Setup page opens in Salesforce.com.
3. Click Create from App Setup, and click Apps.
4. Click Edit for installed application CA Technologies - Clarity, and change the following:

**App Label**

CA Clarity Agile

5. Save your changes.

## Enable Feed Tracking

Enable the Chatter feeds for Kanban Board so that you can collaborate.

**Follow these steps:**

1. Log in to Salesforce.com as the system administrator.
2. Click Setup from the CA Clarity Agile home page.  
The Personal Setup page opens in Salesforce.com.
3. Click Customize from App Setup, and from Chatter, click Feed Tracking.  
Feed Tracking page appears.
4. Select Kanban Board from the object list.
5. Select the following fields:
  - Enable Feed Tracking
  - Kanban Board Name
  - Team
  - Release
6. Save your changes.

## 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=04tA00000000Jyre`

#### Test environment

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000Jyre`

2. Verify the following information:

#### Version Name

Spring 2013

#### Version Number

4.4

#### 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 to set the user access by profile.

7. Set the access levels for each profiles 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.

## 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 4.4 is installed.

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

## Update the Reports and Dashboards

The system administrator must update the Dashboards and Reports labels.

**Follow these steps:**

1. Log in as a system administrator and click Setup.
2. Click Dashboards, and click Go to Dashboard List.
3. Click Edit for Clarity Public Dashboard, enter the following information:

**Dashboard Folder Label**

CA Clarity Agile Public Dashboard

4. Save your changes.
5. Click Edit for CA Clarity Agile Dashboard.
6. Click Dashboard Properties, and enter the following information:

**Title**

Agile Dashboard

7. Save your changes.
8. Click Go to Dashboard List.
9. Click Edit for CA Clarity Requirements Dashboard.
10. Click Dashboard Properties, and enter the following information:

**Title**

Requirements Dashboard

11. Save your changes.
12. Click Go to Dashboard List.
13. Click Edit for CA Clarity Public Reports, and enter the following information:

**Report Folder Label**

CA Clarity Agile Public Reports

14. Save your changes.
15. Click Edit for Sample CA Clarity Reports, and enter the following information:

**Report Folder Label**

CA Clarity Agile Sample Reports

16. Save your changes.

Return to the home page to reschedule all jobs. You have successfully upgraded to the Spring 2013 release. Users can take advantage of the new features and enhancements.

## Run the Upgrade Jobs

Run the upgrade jobs to migrate your existing data for the new features in the new release.

**Follow these steps:**

1. Log in as an administrator at the following URL:

**Production environment**

`https://cavision.cloudforce.com`

**Test environment**

`https://test.salesforce.com`

2. Click Setup.

The Salesforce.com Personal Setup page appears.

3. Click the user ID under which you are logged in, and select Developer Console from the drop-down list.
4. Click the Logs tab.
5. Copy the following statements into the text fields in the Execute Apex section:  
`Database.executeBatch(new ca_agile.SprintBurndownJob(true), 1);`  
`Database.executeBatch(new ca_agile.ReleaseBurndownJob(true), 1);`
6. Click Execute.
7. Return to the Personal Setup page.

When all the migration jobs complete, you will receive an email with subject "CA Clarity Agile Spring 2013 Data Migration Completed". If your email server blocks email from SFDC, check the Junk email folder.

# How to Upgrade to Winter 2013 Service Pack 1 from Winter 2013

This section describes the upgrade to Winter 2013 Service Pack 1 instance of CA Clarity Agile and CA Clarity Requirements from a Winter 2013 release.

Upgrade in sequential order, without skipping releases. For example, if you currently have Summer 2012 installed, upgrade to Winter 2013 before upgrading to Winter 2013 Service Pack 1.

The high-level tasks for the upgrade process include:

1. Delete all scheduled jobs.
2. Install the new package.

## Delete All Scheduled Jobs

Before you upgrade to the new release, delete all scheduled jobs in Salesforce. Deleting scheduled jobs helps ensure 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=04tA00000000JyHr>

#### Test environment

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JyHr>

2. Verify the following information:

#### Version Name

Winter 2013 F1

#### Version Number

4.3

#### 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 to set the user access by profile.

7. Set the access levels for each profiles 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.

## How to Upgrade to Winter 2013 from Summer 2012 Service Pack 1

This section describes the upgrade to Winter 2013 instance of CA Clarity Agile and CA Clarity Requirements from a Summer 2012 Service Pack 1 release.

Upgrade in sequential order, without skipping releases. For example, if you currently have Spring 2012 installed, upgrade to Summer 2012 before upgrading to Winter 2013.

The upgrade process for CA Clarity Agile requires multiple tasks for the administrator to prepare, upgrade, and deploy. The high-level tasks for the upgrade process include:

1. Delete all scheduled jobs.
2. Update the installed package name.
3. Update the user profile name.
4. Install the new package.
5. Verify the installed package.
6. Specify the licenses.
7. Update user profiles.
8. Update the reports and dashboards.

### Delete All Scheduled Jobs in Salesforce

Before you upgrade to the new release, delete all scheduled jobs in Salesforce. Deleting scheduled jobs helps ensure 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.

## Update the Installed Package Name

Before upgrading, modify the package name to match the new package name.

### Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. Click Setup from the CA Clarity Agile or CA Clarity Requirements home page.  
The Personal Setup page opens in Salesforce.com.
3. Click Create from App Setup, and click Apps.
4. Click Edit for installed package CA Technologies - Clarity, and change the following:
  - App Label**  
CA Clarity
5. Save your changes.

## Update the User Profile Names

The profile names in the new package are different from the existing ones. Update the existing user profiles names to new names.

The following table shows the new profile names.

Existing Profile Name	New Profile Name
Agile Vision Super-User	Agile Super-User
Agile Vision User	Agile User

Existing Profile Name	New Profile Name
Product Vision Super-User	Requirements Super-User
Product Vision User	Requirements User
Vision Super-User	Agile/Requirements Super-User
Vision User	Agile/Requirements User

**Follow these steps:**

1. Log in as an administrator at the following URL:  
<https://cavision.cloudforce.com>
2. Click Setup.
3. Click and expand Manage Users from Administration Setup, and click Profiles.
4. Click Edit next to each of the following profiles and update the names as mentioned in the preceding table:
  - Agile Vision Super-User
  - Agile Vision User
  - Product Vision Super-User
  - Product Vision User
  - Vision Super-User
  - Vision User

## 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=04tA00000000Jjwk`

**Test environment**

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000Jjwk`

2. Verify the following information:

**Version Name**

Winter 2013

**Version Number**

4.1

**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 to set the user access by profile.

7. Set the access levels for each profiles 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.

## 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 CA Clarity Agile or CA Clarity Requirements home page, click Setup.  
The Personal Setup page opens in Salesforce.com.
3. Select Installed Packages from the App Setup menu.
4. Verify the correct package is installed.
5. Click Deploy in the Installed Package Detail section.  
The Deploy Package page appears showing the package components.
6. Click Deploy again.

## Specify the Vision Licenses

Verify that the correct Vision product licenses are enabled. By default, both CA Clarity Agile and CA Clarity Requirements are enabled. If you purchased the license for only one of these products, disable the other.

**Follow these steps:**

1. Enter the following URL in the address bar of your browser window:

**Production environment**

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

**Test environment**

`https://ca-agile.csxx.visual.force.com/apex/PackageSettings`

**xx**

The instance number of the organization where the Vision products are installed. You can find this value by logging in to the product and checking the value for xx in the homepage URL.

2. Choose one of the following options and click Save:
  - If you have a license only for CA Clarity Agile, clear the CA Clarity Requirements check box.
  - If you have a license only for CA Clarity Requirements, clear the CA Clarity Agile check box.
  - If you have licenses for both CA Clarity Agile and CA Clarity Requirements, leave both check boxes selected.

You have now specified the correct CA Clarity Agile and CA Clarity Requirements Product licenses.

## Update the User Profiles

Update the specified user profiles to ensure that all users have access to the User Story Completion Status chart.

**Follow these steps:**

1. Log in as an administrator at the following URL:  
<https://cavision.cloudforce.com>
2. Click Setup.
3. In the Administration Setup, expand Manage Users, and click Profiles.
4. Click Requirements User from the list of User Profiles.
5. Scroll to Enabled Visualforce Page Access, and click Edit.
6. Select AgilePlannerUserDetail from Available Visualforce Pages, and click Add.
7. Save your changes.

## Update the Reports and Dashboards

The system administrator must update the Dashboards and Reports labels.

**Follow these steps:**

1. Log in as a system administrator and click Setup.
2. Click Dashboards and click Go to Dashboard List.
3. Click Edit for Vision Product Dashboard, enter the following information:

**Dashboard Folder Label**

CA Clarity Public Dashboard

4. Save your changes.
5. Click Edit for Agile Vision Dashboard.
6. Click Dashboard Properties, and enter the following information:

**Title**

CA Clarity Agile Dashboard

7. Save your changes.
8. Click Go to Dashboard List.
9. Click Edit for Product Vision Dashboard.
10. Click Dashboard Properties, and enter the following information:

**Title**

CA Clarity Requirements Dashboard

11. Save your changes.
12. Click Go to Dashboard List.
13. Click Edit for Vision Public Reports, and enter the following information:

**Report Folder Label**

CA Clarity Public Reports

14. Save your changes.
15. Click Edit for Sample Agile Vision Reports, and enter the following information:

**Report Folder Label**

Sample CA Clarity Reports

16. Save your changes.

Return to the CA Clarity Agile or CA Clarity Requirements home page to reschedule all jobs. You have successfully upgraded to the Winter 2013 release. Users can take advantage of the new features and enhancements.

# How to Upgrade to Summer 2012 Service Pack 1 from Summer 2012

This section describes the upgrade to Summer 2012 Service Pack 1 instance of CA Clarity Agile from a Summer 2012 release.

**Important!** Plan to complete upgrade to CA Clarity Agile Summer 2012 Service Pack, at the same time that you upgrade to CA Clarity Requirements and CA Clarity Agile Add-in for CA Clarity PPM. Completing the upgrades at the same time helps ensure that the release levels are the same.

**Required:** Upgrade from Summer 2012. If you have a previous release installed, then upgrade to Summer 2012 before upgrading to the new release.

The upgrade process for CA Clarity Agile requires multiple tasks for the administrator to prepare, upgrade, and deploy. The high-level tasks for the upgrade process include:

Perform these steps to upgrade CA Clarity Agile:

1. [Delete all scheduled jobs](#) (see page 33)
2. [Install the new package](#) (see page 34)
3. [Verify the installed package](#) (see page 36)
4. [Specify the Vision licenses](#) (see page 36)
5. [Update user profiles](#) (see page 37)
6. [Run the upgrade jobs](#) (see page 39)

## Delete All Scheduled Jobs in Salesforce

Before you upgrade to the new release, delete all scheduled jobs in Salesforce. Deleting scheduled jobs helps ensure 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.

<b>User Profile</b>	<b>Access Level</b>
Agile Vision Super-User	Agile Vision Super-User
Agile Vision User	Agile Vision User
Product Vision Super-User	Product Vision Super-User
Product Vision User	Product Vision User
Vision Super-User	Vision Super-User
Vision User	Vision 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=04tA00000000JpSH`

**Test environment**

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JpSH`

2. Verify the following information:

**Version Name**

Summer 2012 SP1

**Version Number**

3.7

**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 to set the user access by profile.

7. Set the access levels for each profiles 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.

## 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 CA Clarity Agile or CA Clarity Requirements home page, click Setup.  
The Personal Setup page opens in Salesforce.com.
3. Select Installed Packages from the App Setup menu.
4. Verify the correct package is installed.
5. Click Deploy in the Installed Package Detail section.  
The Deploy Package page appears showing the package components.
6. Click Deploy again.

## Specify the Vision Licenses

Verify that the correct Vision product licenses are enabled. By default, both CA Clarity Agile and CA Clarity Requirements are enabled. If you purchased the license for only one of these products, disable the other.

**Follow these steps:**

1. Enter the following URL in the address bar of your browser window:

**Production environment**

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

**Test environment**

`https://ca-agile.csxx.visual.force.com/apex/PackageSettings`

**xx**

The instance number of the organization where the Vision products are installed. You can find this value by logging in to the product and checking the value for xx in the homepage URL.

2. Choose one of the following options and click Save:

- If you have a license only for CA Clarity Agile, clear the CA Clarity Requirements check box.
- If you have a license only for CA Clarity Requirements, clear the CA Clarity Agile check box.
- If you have licenses for both CA Clarity Agile and CA Clarity Requirements, leave both check boxes selected.

You have now specified the correct Vision Product licenses.

## Update User Profiles

Update the specified user profiles to ensure that all users have access to the User Story Completion Status chart. The following table shows the Custom Object Permissions that you have to add or remove for each profile.

Profile	Custom Object	Add Permissions	Remove Permissions
Agile Vision Super-User	User Story Completion Status	Read	
Agile Vision User	Teams	Create, Delete	
	User Story Completion Status	Read	
Product Vision Super-User	QC Folders, QC Projects, Test Cases, Test Case Steps	Read	
	Requirement Flat	Read, Create, Edit, Delete	
Product Vision User	QC Folders, QC Projects, Test Cases, Test Case Steps	Read	
	Requirement Flat	Read, Create, Edit, Delete	
Vision Super-User	Feature		View All, Modify All
	User Story Completion Status	Read	
	Requirement Flat	Read, Create, Edit, Delete	
Vision User	Teams	Create, Delete	

Profile	Custom Object	Add Permissions	Remove Permissions
	User Story Completion Status	Read	
	Requirement Flat	Read, Create, Edit, Delete	

**Follow these steps:**

1. Log in as an administrator at the following URL:  
<https://cavision.cloudforce.com>
2. Click Setup.
3. In the Administration Setup, expand Manage Users, and click Profiles.
4. Update each profile using the following steps:
  - a. Click Edit next to each of the following profiles:
    - Agile Vision Super-User
    - Agile Vision User
    - Vision Super-User
    - Vision User
  - b. Navigate to the Custom Object Permissions section of each profile, and add or remove the permissions as indicated in the preceding table.

Salesforce.com users that use these profiles can now access the User Story Completion Status chart.

## Run the Upgrade Jobs

Run the upgrade jobs to migrate your existing data for the new features in the new release.

**Follow these steps:**

1. Log in as an administrator at the following URL:

**Production environment**

`https://cavision.cloudforce.com`

**Test environment**

`https://test.salesforce.com`

2. Click Setup.

The Salesforce.com Personal Setup page appears.

3. Click the user ID under which you are logged in and select Developer Console from the drop-down list.
4. Click the Logs tab.
5. Copy the following statements into the Execute field:  
`Database.executeBatch(new ca_agile.ProductMigrationJob());`  
`Database.executeBatch(new ca_agile.TaskMigrationJob());`
6. Click Execute.
7. Return to the Personal Setup page.
8. Navigate to the Administration Setup section.
9. Expand Monitoring, Apex Jobs to monitor the progress of the submitted jobs.

When the jobs complete successfully, your data is migrated to the CA Clarity Agile or CA Clarity Requirements new release. Salesforce.com sends a data migration completed email to the email address of the user that you used to log in.

**Note:** If you do not receive the email, check your Junk Email folder.

You have successfully upgraded CA Clarity Agile or CA Clarity Requirements.

## How to Upgrade to Summer 2012 from Spring 2012 Service Pack 1

This section describes the upgrade to Summer 2012 instance of CA Clarity Agile from a Spring 2012 Service Pack 1 release.

**Important!** Plan to complete upgrade to CA Clarity Agile Summer 2012, at the same time that you upgrade to CA Clarity Requirements and CA Clarity Agile Add-in for CA Clarity PPM. Completing the upgrades at the same time helps ensure that the release levels are the same.

**Required:** Upgrade from Spring 2012. If you have a previous release that is installed, then upgrade to Spring 2012 before upgrading to the new release.

The upgrade process for CA Clarity Agile requires multiple tasks for the administrator to prepare, upgrade, and deploy. The high-level tasks for the upgrade process include:

Perform these steps to upgrade CA Clarity Agile:

1. [Delete all scheduled jobs](#) (see page 40)
2. [Install the new package](#) (see page 41)
3. [Verify the installed package](#) (see page 43)
4. [Specify the Vision licenses](#) (see page 43)
5. [Update user profiles](#) (see page 44)
6. [Run the upgrade jobs](#) (see page 46)

### Delete All Scheduled Jobs in Salesforce

Before you upgrade to the new release, delete all scheduled jobs in Salesforce. Deleting scheduled jobs helps ensure 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.

<b>User Profile</b>	<b>Access Level</b>
Agile Vision Super-User	Agile Vision Super-User
Agile Vision User	Agile Vision User
Product Vision Super-User	Product Vision Super-User
Product Vision User	Product Vision User
Vision Super-User	Vision Super-User
Vision User	Vision 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=04tA00000000JoGj`

**Test environment**

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JoGj`

2. Verify the following information:

**Version Name**

Summer 2012

**Version Number**

3.6

**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 to set the user access by profile.

7. Set the access levels for each profiles 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.

## 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 CA Clarity Agile or CA Clarity Requirements home page, click Setup.  
The Personal Setup page opens in Salesforce.com.
3. Select Installed Packages from the App Setup menu.
4. Verify the correct package is installed.
5. Click Deploy in the Installed Package Detail section.  
The Deploy Package page appears showing the package components.
6. Click Deploy again.

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

## Specify the Vision Licenses

Verify that the correct Vision product licenses are enabled. By default, both CA Clarity Agile and CA Clarity Requirements are enabled. If you purchased the license for only one of these products, disable the other.

**Follow these steps:**

1. Enter the following URL in the address bar of your browser window:

**Production environment**

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

**Test environment**

`https://ca-agile.csxx.visual.force.com/apex/PackageSettings`

**xx**

The instance number of the organization where the Vision products are installed. You can find this value by logging in to the product and checking the value for xx in the homepage URL.

2. Choose one of the following options and click Save:
  - If you have a license only for CA Clarity Agile, clear the CA Clarity Requirements check box.
  - If you have a license only for CA Clarity Requirements, clear the CA Clarity Agile check box.
  - If you have licenses for both CA Clarity Agile and CA Clarity Requirements, leave both check boxes selected.

You have now specified the correct Vision Product licenses.

## Update User Profiles

Update the specified user profiles to ensure that all users have access to the User Story Completion Status chart. The following table shows the Custom Object Permissions that you have to add or remove for each profile.

Profile	Custom Object	Add Permissions	Remove Permissions
Agile Vision Super-User	User Story Completion Status	Read	
Agile Vision User	Teams	Create, Delete	
	User Story Completion Status	Read	
Product Vision Super-User	QC Folders, QC Projects, Test Cases, Test Case Steps	Read	
	Requirement Flat	Read, Create, Edit, Delete	
Product Vision User	QC Folders, QC Projects, Test Cases, Test Case Steps	Read	
	Requirement Flat	Read, Create, Edit, Delete	
Vision Super-User	Feature		View All, Modify All
	User Story Completion Status	Read	
	Requirement Flat	Read, Create, Edit, Delete	
Vision User	Teams	Create, Delete	

Profile	Custom Object	Add Permissions	Remove Permissions
	User Story Completion Status	Read	
	Requirement Flat	Read, Create, Edit, Delete	

**Follow these steps:**

1. Log in as an administrator at the following URL:  
<https://cavision.cloudforce.com>
2. Click Setup.
3. In the Administration Setup, expand Manage Users, and click Profiles.
4. Update each profile using the following steps:
  - a. Click Edit next to each of the following profiles:
    - Agile Vision Super-User
    - Agile Vision User
    - Vision Super-User
    - Vision User
  - b. Navigate to the Custom Object Permissions section of each profile, and add or remove the permissions as indicated in the preceding table.

Salesforce.com users that use these profiles can now access the User Story Completion Status chart.

## Run the Upgrade Jobs

Run the upgrade jobs to migrate your existing data for the new features in the new release.

**Follow these steps:**

1. Log in as an administrator at the following URL:

**Production environment**

`https://cavision.cloudforce.com`

**Test environment**

`https://test.salesforce.com`

2. Click Setup.  
The Salesforce.com Personal Setup page appears.
3. Click the user ID under which you are logged in and select Developer Console from the drop-down list.
4. Click the Logs tab.
5. Copy the following statements into the Execute field:  
`Database.executeBatch(new ca_agile.ProductMigrationJob());`  
`Database.executeBatch(new ca_agile.TaskMigrationJob());`
6. Click Execute.
7. Return to the Personal Setup page.
8. Navigate to the Administration Setup section.
9. Expand Monitoring, Apex Jobs to monitor the progress of the submitted jobs.

When the jobs complete successfully, your data is migrated to the CA Clarity Agile or CA Clarity Requirements new release. Salesforce.com sends a data migration completed email to the email address of the user that you used to log in.

**Note:** If you do not receive the email, check your Junk Email folder.

You have successfully upgraded CA Clarity Agile or CA Clarity Requirements.

# Chapter 4: CA Clarity Agile Add-ins

---

The CA Clarity Agile add-in files are included in the CA Clarity PPM Release 13.2.00 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*.