

CA Clarity Agile

Implementation Guide

Winter 2013



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CA Technologies Product References

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

- CA Clarity Agile
- CA Clarity Requirements
- 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
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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 17)
- [CA Clarity Agile and CA Clarity Requirements Add-ins](#) (see page 71)

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)

[Specify the Licenses](#) (see page 13)

[Configure CA Clarity Agile](#) (see page 13)

Prepare to Install CA Clarity Agile

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

The following table specifies which profiles are required to install CA Clarity Agile, CA Clarity Requirements, or both products.

Profile	CA Clarity Agile	CA Clarity Requirements	CA Clarity Agile and CA Clarity Requirements
Agile Super-User	X		X
Agile User	X		X
Requirements Super-User		X	X
Requirements User		X	X
Agile/Requirements Super-User			X

Agile/Requirements User	X
-------------------------	---

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 that are specified in the previous table 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=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 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 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 that package CA Clarity, Version 4.1 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 Licenses

Verify that the correct 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 CA Clarity Agile and CA Clarity Requirements 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.

Configure CA Clarity Agile

After the licenses are 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 PPM.
6. Save your changes.
7. Repeat the steps 3 through 5 to set CA Clarity PPM as the default app for each new profile you created.
8. (CA Clarity Agile customers only). 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 the CA Clarity Agile and CA Clarity Requirements products are installed.

The jobs are rescheduled automatically.

Configure Existing Profiles to use CA Clarity Requirements

Edit the Salesforce.com user profiles to provide appropriate read or write permissions to the CA Clarity Agile or CA Clarity Requirements 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 CA Clarity Agile and CA Clarity Requirements Public Dashboard

The CA Clarity Agile and CA Clarity Requirements 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 CA Clarity Agile Dashboard or CA Clarity Requirements Dashboard.

Follow these steps:

1. Log in as a system administrator and click Setup.
2. Click Dashboards and open one of the dashboards, such as 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 CA Clarity Agile and CA Clarity Requirements 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 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 have licenses for CA Clarity Agile or CA Clarity Requirements and integrate with other products such as CA Clarity PPM, upgrade the CA Clarity Agile and CA Clarity Requirements products and the Add-ins at the same time.
- 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.

This section contains the following topics:

[Overview: Upgrade to the New Release of CA Clarity Agile](#) (see page 17)

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

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

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

[How to Upgrade to Spring 2012 from Winter 2012 Service Pack 2](#) (see page 42)

[How to Upgrade to Winter 2012 Service Pack 2 from Winter 2012 Service Pack 1](#) (see page 45)

[How to Upgrade to Winter 2012 Service Pack 1 from Winter 2012](#) (see page 48)

[How to Upgrade to Winter 2012 \(Version 3.0\) from Spring 2011 \(Version 2.10\)](#) (see page 53)

[Upgrade to Version 2.10 from Version 2.8](#) (see page 57)

[How to Upgrade to Version 2.8 from Version 2.5.3](#) (see page 60)

[Upgrade to Version 2.5.3 from Version 2.3](#) (see page 60)

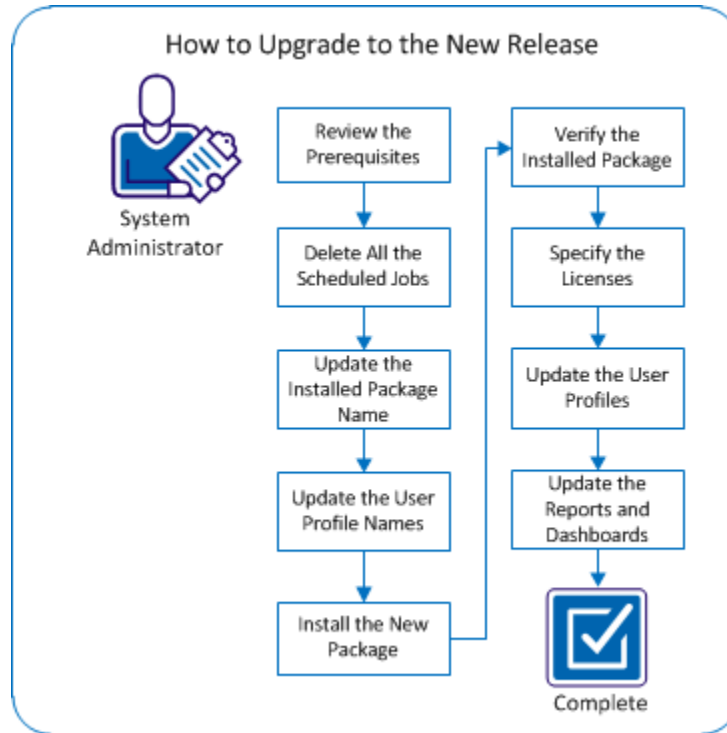
[Upgrade to Version 2.5.3 from Version 1.8](#) (see page 62)

[Upgrade to 1.8 from Versions 1.5 and 1.7](#) (see page 66)

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 Winter 2013. The upgrade includes installing and deploying the package, and configuring user profiles and objects for the new features.

The following graphic describes how the administrator upgrades CA Clarity Agile to the latest release.



Perform these steps to upgrade CA Clarity Agile:

1. [Review the prerequisites](#) (see page 19).
2. [Delete all scheduled jobs](#) (see page 19).
3. [Update the installed package name](#) (see page 20).
4. [Update the user profile names](#) (see page 20).
5. [Install the new package](#) (see page 21).
6. [Verify the installed package](#) (see page 12).
7. [Specify the licenses](#) (see page 13).
8. [Update the user profiles](#) (see page 24).
9. [Update the reports and dashboards](#) (see page 25).

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 Spring 2012 installed, upgrade to Summer 2012 before upgrading to Winter 2013.
- You have the product licenses for CA Clarity Agile, or CA Clarity Requirements, or both.

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
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 that package CA Clarity, Version 4.1 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 Licenses

Verify that the correct 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 CA Clarity Agile and CA Clarity Requirements 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 26)
2. [Install the new package](#) (see page 27)
3. [Verify the installed package](#) (see page 29)
4. [Specify the Vision licenses](#) (see page 29)
5. [Update user profiles](#) (see page 30)
6. [Run the upgrade jobs](#) (see page 32)

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.

User Profile	Access Level
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=04tG00000000Eved`

Test environment

`https://login.salesforce.com/packaging/installPackage.apexp?p0=04tG00000000Eved`

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 that package CA Clarity, Version 3.8 is installed.
5. Click Deploy in the Installed Package Detail section.

The Deploy Package page appears showing the package components.

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 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 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.

User Profile	Access Level
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=04tG0000000Eved`

Test environment

`https://login.salesforce.com/packaging/installPackage.apexp?p0=04tG0000000Eved`

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 that package CA Clarity, Version 3.8 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.

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

This section describes the upgrade of a Spring 2012 Service Pack1, instance of CA Clarity Agile from a Spring 2012 release.

Important! Plan to complete upgrade to CA Clarity Agile Spring 2012 Service Pack1, 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 Winter 2012. If you have a previous release installed, then upgrade to Winter 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:

Follow these steps:

1. Log in to Salesforce.com as system administrator
2. Delete all scheduled jobs in Salesforce.
3. Install the new package.

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

- Return to the Personal Setup page.

You are prepared to install the new package.

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

The table shows the access levels for each profile.

User Profile	Access Level
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:

- Log in as the administrator to one of the following URLs:

Production environment:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JLAS>

Test environment:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JLAS>

- Verify the following information:

Version Name

Spring 2012 D1

Version Number

3.5

Publisher

CA Technologies

3. Click Continue.
The Handle Component Name Conflicts page appears.
4. Select Block installation and list conflicts, and click Next.
The Approve Package API Access step page appears.
5. Set Extended Object Permissions.
6. Select Read, Create, and Edit permissions for all the objects.
7. Click Next.
The Choose security level page appears.
8. Select the Security Settings option to set user access by profile.
9. Set the access levels for each profiles as mentioned in the preceding table.
10. Click Next.
11. 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.

How to Upgrade to Spring 2012 from Winter 2012 Service Pack 2

This section describes the upgrade of a Spring 2012, instance of CA Clarity Agile from a Winter 2012, Service Pack 2 release.

Important! Plan to complete upgrade to CA Clarity Agile Spring 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 Winter 2012. If you have a previous release installed, upgrade to Winter 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:

Follow these steps:

1. Log in to Salesforce.com as system administrator
2. Delete all scheduled jobs in Salesforce.
3. Install the new package.

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 CA Agile Vision

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

The table shows the access levels for each profile.

User Profile	Access Level
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 the administrator to one of the following URLs:

Production environment:

`https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JLAS`

Test environment:

`https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JLAS`

2. Verify the following information:

Version Name

Spring 2012

Version Number

3.4

Publisher

CA Technologies

3. Click Continue.
The Handle Component Name Conflicts page appears.
4. Select Block installation and list conflicts, and click Next.
The Approve Package API Access step page appears.
5. Set Extended Object Permissions.
6. Select Read, Create, and Edit permissions for all the objects.
7. Click Next.
The Choose security level page appears.
8. Select the Security Settings option to set user access by profile.
9. Set the access levels for each profiles as mentioned in the preceding table.
10. Click Next.
11. 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.

How to Upgrade to Winter 2012 Service Pack 2 from Winter 2012 Service Pack 1

This section describes the upgrade of a Winter 2012, Service Pack 2 instance of CA Clarity Agile from a Winter 2012, Service Pack 1 release.

Important: Plan to complete upgrade to CA Clarity Agile Winter 2012, Service Pack 2 at the same time that you upgrade to CA Clarity Requirements and CA Clarity Agile Add-in for CA Clarity PPM. Completing the upgrades and the same time helps ensure that the release levels are the same.

Important: Upgrade from Winter 2012.

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:

Follow these steps:

1. Log in to Salesforce.com as system administrator
2. [Install CA Clarity Agile Winter 2012, Service Pack](#) (see page 46)2.
3. [Deploy the package](#) (see page 47).

Install CA Clarity Agile

To install, delete the existing jobs and then log in to the Web site to begin the installation.

The following table specifies the access level that you assign to each user profile. You set the access level in the following steps:

User Profile and Access Level	For CA Clarity Agile	For CA Clarity Agile and CA Clarity Requirements
Agile Vision Super-User	X	X
Agile Vision User	X	X
Product Vision Super-User		X
Product Vision User		X
Vision Super-User		X
Vision User		X

Follow these steps:

1. Delete the existing jobs.
 - a. Open the Setup page and expand Monitoring, Scheduled Jobs from the Administration Setup section.
 - b. 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
2. Enter the following URL in the address bar of your browser window.

Note: If you are installing into a sandbox environment, replace "login.salesforce.com" with "test.salesforce.com" in the URL.

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000JjNw>

3. On the Login page, enter the system administrator user name and password and click Login.
4. Enter the password that is provided to you for installing the new version and click Submit. If you do not have the required password, contact [CA Support](#).
5. Verify the version of CA Technologies - PPM package you are installing and the publisher as follows:
 - Version Name: Winter 2012, C2
 - Version Number: 3.3
 - Publisher: CA Technologies
6. Click Next to advance through the wizard.

A security options page appears.
7. Select the security settings option to set user access by profile.
8. Set the access levels that are specified at the beginning of these steps for the corresponding profiles and click Next to continue. For example, set the access level for the Agile Vision Super-User, as Agile Vision Super-User.
9. Click Next to continue.
10. Click Install.

The Processing page appears indicating that your request is in progress. When the install is complete, an email notification is sent from Salesforce.com to the email address of the user you are currently logged in as. The installation can take over 30 minutes depending on the current load on the Force.com platform.

Deploy CA Clarity Agile

By default, both CA Clarity Agile and CA Clarity Requirements are enabled. If you purchased the license for only one of these services, disable the other as described in the following steps.

Follow these steps:

1. From the Home page, click Setup.

The Personal Setup page appears.
2. Select Installed Packages from the App Setup menu.
3. Verify that CA Technologies - PPM, Version 3.3 is being deployed.
4. Click the CA Technologies - PPM package name.

The Installed Package Detail page appears.
5. Click Deploy in the Installed Package Detail section.

The Deploy Package page appears showing the package components.

6. Click Deploy again.
7. Enter the following URL in the address bar of your browser window:
`https://ca-agile.na7.visual.force.com/apex/PackageSettings`
8. Choose one of the following actions and click Save:
 - If you have license only for Agile Vision, clear the Product Vision check box.
 - If you have license only for Product Vision, clear the Agile Vision check box.
 - If you have licenses for both Agile Vision and Product Vision, leave both check boxes selected.

CA Clarity Agile and CA Clarity Requirements are now fully deployed.

How to Upgrade to Winter 2012 Service Pack 1 from Winter 2012

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

Important: Plan to complete upgrade to CA Clarity Agile Winter 2012, Service Pack 1 at the same time that you upgrade to CA Clarity Requirements and CA Clarity Agile Add-in for CA Clarity PPM. Completing the upgrades and the same time helps ensure that the release levels are the same.

Required: Upgrade from Version 3.00. If you have a previous release that is installed, upgrade to 3.00 before upgrading to the service pack.

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:

Follow these steps:

1. Log in to Salesforce.com as System Administrator
2. [Install CA Clarity Agile Winter 2012, Service Pack](#) (see page 49)1.
3. [Deploy the package](#) (see page 50).
4. [Configure Privileges for Charts and Reports on the Vision Public](#) (see page 51)Dashboard.

Install CA Clarity Agile

To install, delete the existing jobs and then log in to the Web site to begin the installation.

The following table specifies the access level you assign to each user profile. You set the access level in the following steps:

User Profile and Access Level	For CA Clarity Agile	For CA Clarity Agile and CA Clarity Requirements
Agile Vision Super-User	X	X
Agile Vision User	X	X
Product Vision Super-User		X
Product Vision User		X
Vision Super-User		X
Vision User		X

Follow these steps:

1. Delete the existing jobs.
 - a. Open the Setup page and expand Monitoring, Scheduled Jobs from the Administration Setup section.
 - b. 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
2. Enter the following URL in the address bar of your browser window.

Note: If you are installing into a sandbox environment, replace "login.salesforce.com" with "test.salesforce.com" in the URL.

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000Jj7A>

3. On the Login page, enter the system administrator user name and password and click Login.
4. Enter the password that is provided to you for installing the new version and click Submit. If you do not have the required password, contact [CA Support](#).
5. Verify the version of CA Technologies - PPM package you are installing and the publisher as follows:
 - Winter 2012, Patch 1
 - CA Technologies
6. Click Next to advance through the wizard.
A security options page appears.
7. Select the security settings option to set user access by profile.
8. Set the access levels that are specified at the beginning of these steps for the corresponding profiles and click Next to continue. For example, set the access level for the Agile Vision Super-User, as Agile Vision Super-User.
9. Click Next to continue.
10. Click Install.

The Processing page appears indicating that your request is in progress. When the install is complete, an email notification is sent from Salesforce.com to the email address of the user you are currently logged in as. The installation can take over 30 minutes depending on the current load on the Force.com platform.

Deploy CA Clarity Agile

By default, both CA Clarity Agile and CA Clarity Requirements are enabled. If you purchased the license for only one of these services, disable the other as described in the following steps.

Follow these steps:

1. From the Home page, click Setup.
The Personal Setup page appears.
2. Select View Installed Packages from the App Setup menu.
3. Verify that CA Technologies - PPM, Version 3.20 Service Pack 1, is installed.
4. Click the CA Technologies - PPM package name.
The Package Details page appears.
5. Click Deploy in the Installed Package Detail section.
The Deploy Package page appears showing the package components.

6. Click Deploy again.
7. Enter the following URL in the address bar of your browser window:
`https://ca-agile.na7.visual.force.com/apex/PackageSettings`

Configure Privileges for Charts and Reports on the Vision Public Dashboard

The Vision Public Dashboards require configuration of profiles. These dashboards appear on the Salesforce.com main page.

The system administrator must configure profiles so that users can view the charts and reports available from the Agile Vision Dashboard or Product Vision Dashboard.

Note: If you have already configured these privileges, you can skip this step.

Follow these steps:

1. Log in as a system administrator and click Setup.
2. Click Dashboards and open one of the Vision dashboards, such as Agile Vision 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 then 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.
 - Vision Super-User
 - Vision User
 - Agile Vision Super-User

- Agile Vision User
 - Product Vision Super-User
 - Product Vision 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 Vision Public Dashboard. The user can view, modify, clone, or perform other actions, which are based on the privileges that are associated with the profile.

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

How to Upgrade to Winter 2012 (Version 3.0) from Spring 2011 (Version 2.10)

This section describes the upgrade of a Winter 2012 instance CA Clarity Agile from a Spring 2011 release.

Important: Plan to complete upgrade to CA Clarity Agile Winter 2012 at the same time that you upgrade to CA Clarity Requirements and the 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 Version 2.10. If you have a previous release installed, you must upgrade to V2.10 before upgrading to V3.0.

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:

Follow these steps:

1. Log in to Salesforce.com as System Administrator.
2. Install the Winter 2012 Release.
3. Deploy the package.
4. Update user profiles.
5. Run the upgrade jobs.

Update User Profiles for Winter 2012

This procedure explains how to update Apex Class access and custom object permission for the CA Clarity Agile profiles:

Note: In the list of pages to update for each user profile in the following sections, the namespace (prefix) *ca_agile* is not included. This prefix is attached to each page name in the user interface.

Follow these steps:

1. Click Setup.
The Personal Setup page appears.
2. In the Administration Setup menu, click and expand Manage users, then click Profiles.
The profiles list page appears.

3. Locate the user profile in the list and click the profile name.

The profile page appears. Update the specified permissions for each profile.

Agile Vision Super-User

- a. Click Enabled Apex Class Access and then click Edit.
The Enable Apex Class Access page opens.
- b. Select **XMLSObjectField** from the Available Apex Classes and click Add (right arrow) to add the class to the Enabled Apex Classes.
- c. Click Save and Back.

Agile Vision User

- a. Click Edit for the Profile Detail section.
- b. Scroll to Custom Object Permissions and select the Edit permission for the following objects:
 - Products
 - Releases
 - Sprints
 - Sprint Teams
 - Click Save.
- c. Click Enabled Apex Class Access and then click Edit.
- d. Select **XMLSObjectField** from the Available Apex Classes and click Add (right arrow) to add the class to the Enabled Apex Classes.
- e. Click Save and return to the User Profiles page.

Vision Super-User

- a. Click Enabled Apex Class Access and then click Edit.
- b. Select **XMLSObjectField** from the Available Apex Classes and click Add (right arrow) to add the class to the Enabled Apex Classes.
- c. Click Save and return to the User Profiles page.

Vision User

- a. Click Edit for the Profile Detail section.
- b. Scroll to Custom Object Permissions and select Edit permission for the following objects:
 - Sprints
 - Sprint Teams
- c. Click Save.
- d. Click Enabled Apex Class Access and then click Edit.
- e. Select **XMLObjectField** from the Available Apex Classes and click Add (right arrow) to add the class to the Enabled Apex Classes.
- f. Click Add and then click Save.
- g. Click Save.
- h. Click Enabled Visualforce Page Access and then click Edit.
- i. Add the following permission to Enabled Visualforce Pages:
SprintTeamEdit
- j. Click Save and return to the User Profiles page.

Run the Upgrade Jobs for Winter 2012

To complete the upgrade to the new package, run the upgrade jobs.

Follow these steps:

1. Log in as System Administrator.
2. Click Setup to open the Salesforce.com setup page.
3. Click the user name under which you are logged in (from the page header) and select System Log.
4. Copy the following statements into the text field in the Execute Apex section and click Execute.

Note: Salesforce.com allows a maximum five jobs to run at a time; paste the job statements in groups of 3, or something similar.

If you are upgrading both CA Clarity Agile and CA Clarity Requirements, run the following jobs:

```
Database.executeBatch(new ca_agile.ProductMigrationJob());  
Database.executeBatch(new ca_agile.TaskMigrationJob());  
Database.executeBatch(new ca_agile.TeamDailyDataMigrationJob());
```

```
Database.executeBatch(new ca_agile.FilterPageNameMigrationJob());  
Database.executeBatch(new ca_agile.ReleaseDescriptionMigrationJob());  
Database.executeBatch(new  
ca_agile.RequirementClosedDateUpgradeJob('ca_agile'),200);
```

If you are only upgrading CA Clarity Agile, run the following jobs:

```
Database.executeBatch(new ca_agile.ProductMigrationJob());  
Database.executeBatch(new ca_agile.TaskMigrationJob());  
Database.executeBatch(new ca_agile.TeamDailyDataMigrationJob());  
Database.executeBatch(new ca_agile.FilterPageNameMigrationJob());  
Database.executeBatch(new ca_agile.ReleaseDescriptionMigrationJob());
```

5. From the Setup page and expand Administration Setup, Monitoring, Apex Jobs to monitor the submitted jobs until they complete successfully.
6. Log in to CA Clarity Agile open the Home Page.

The CA Clarity Agile and CA Clarity Requirements jobs are automatically rescheduled.

Upgrade to Version 2.10 from Version 2.8

Upgrade to CA Clarity Agile Version 2.10 by installing and deploying the package.

Required: Upgrade from Version 2.8. If you have a previous release installed, you must upgrade to V2.8 before upgrading to V2.10.

Important: Plan to complete upgrade to CA Clarity Agile and CA Clarity Requirements Spring 2011 (Version 2.10) at the same time that you complete the upgrade to the CA Clarity Agile Add-In for CA Clarity PPM so that the release levels are the same.

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

Follow these steps:

1. Upgrade CA Clarity Agile.
2. Deploy CA Clarity Agile.

Prepare to upgrade CA Clarity Agile

Complete the following configuration steps before upgrading CA Clarity Agile from Spring 2011 (Version 2.8) to Spring 2011 (Version 2.10).

Follow these steps:

1. From the CA Clarity Agile home page, click Setup.
The Salesforce.com personal setup page appears.
2. From the Administration Setup menu, click Monitoring and go to Scheduled Jobs.
The All Scheduled Jobs page appears.
3. Delete the following jobs if they exist:
 - Daily chart data point generation for Release
 - Daily chart data point generation for Sprint

Upgrade CA Clarity Agile

Upgrade the package.

Follow these steps:

1. Enter the following URL in the address bar of your browser window. If you are installing into a test environment, replace "login.salesforce.com" with "test.salesforce.com" in the URL.

`https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000000Jhnl`

2. On the Login page, enter the system administrator user name and password and click Login.
3. Enter the password provided to you for upgrading to this version of CA Clarity Agile and click Submit. If you do not have the required password, contact [CA Support](#).
A summary of the upgrade appears showing the old and new versions of CA Clarity Agile.

4. Click Continue to advance through the upgrade wizard.
5. Click Next.

A security options page appears.

6. Select the security settings option to set user access by profile.
7. Set the following access levels for the corresponding profiles:

Set this Access Level	For this Profile
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

8. Click Next to continue.
A page appears with the following check box: "Ignore Apex test failures that may cause the installed application not to function properly".
9. Select the check box.

10. Click Install.

The Processing page appears indicating that your request is in progress. When the upgrade is complete, an email notification is sent from Salesforce.com to the email address of the user you are currently logged in as. The upgrade can take over 30 minutes depending on the current load on the Force.com platform.

11. Log out and log back into CA Clarity Agile as the system administrator to allow the scheduled jobs to run properly.

12. Go to the Setup page and select Scheduled Jobs from the Monitoring menu under Administration Setup. Verify that the Submitted By user is a system administrator. If the Submitted By user is not a system administrator, delete the jobs, log out and log back in as a system administrator.

Deploy CA Clarity Agile

Note: If Salesforce.com can automatically deploy the package, the Deploy button is disabled and you can skip the rest of the steps. If the Deploy button is enabled, follow the steps to deploy the package.

1. From the Agile Vision Home page, click Setup.

The Personal Setup page appears.

2. Select View Installed Packages from the App Setup menu.

3. Verify that CA Technologies - PPM, Version 2.10 is installed.

4. Click the CA Technologies - PPM package name.

The Package Details page appears.

5. Click Deploy in the Installed Package Detail section.

The Deploy Package page appears showing the package components.

6. Click Deploy again.

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

<https://ca-agile.na7.visual.force.com/apex/PackageSettings>

8. Do one of the following and click Save:

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

CA Clarity Agile is now fully deployed.

How to Upgrade to Version 2.8 from Version 2.5.3

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

Follow these steps:

1. Deploy CA Agile Vision.
2. Configure CA Agile Vision using the following sub-tasks:
 - a. Remove Completed Status for Tasks in CA Agile Vision.
 - b. Update User Profiles
 - c. Configure the System Administrator Profile for CA Agile Vision.
3. Upgrade Your Data.
4. Set Up Chatter Feeds for CA Agile Vision Objects and Attributes.

Important: Plan to complete upgrade to CA Agile Vision and CA Clarity Requirements Spring 2011 at the same time that you complete the upgrade to the CA Agile Vision Add-In for CA Clarity PPM so that the release levels are the same.

Upgrade to Version 2.5.3 from Version 2.3

Complete the following steps to upgrade CA Clarity Agile from Winter 2011 (Version 2.3) to Winter 2011 (Version 2.5.3) Patch 1.

1. Log out of CA Clarity Agile and enter the following URL on the address bar of your browser window:

`https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tA0000000R6ZN`
2. On the Login page, enter the system administrator user name and password and click Login.

Enter the password provided to you for upgrading to CA Clarity Agile, Version 2.5.3 and click Submit. If you do not have the required password, contact [CA Support](#).

A summary of the upgrade appears showing the old and new versions of CA Clarity Agile.
3. Click Continue to advance through the upgrade wizard.
4. Click Next.

A security options page appears.

5. Select the security settings option to set user access by profile.
6. Set the following access levels for the corresponding profiles and click Next to continue:
 - Agile Vision Super-User access for the Agile Vision Super-User profile
 - Agile Vision User access for the Agile Vision User profile
 - Product Vision Super-User access for the Product Vision Super-User profile.
 - Product Vision User access for the Product Vision User profile.
 - Vision Super-User access for the Vision Super-User profile.
 - Vision User option for the Vision User profile.
7. Click Next to continue.

A page appears with the following check box: “Ignore Apex test failures that may cause the installed application not to function properly”.
8. Select the check box.
9. Click Install.

The Processing page appears indicating that your request is in progress. When the upgrade is complete, an email notification is sent from Salesforce.com to the email address of the user you are currently logged in as. The upgrade can take over 30 minutes depending on the current load on the Force.com platform.
10. Log out and log back into CA Clarity Agile as the system administrator to allow the scheduled jobs to run properly.
11. Go to the Setup page and select Scheduled Jobs from the Monitoring menu under Administration Setup. Verify that the Submitted By user is a system administrator. If the Submitted By user is not a system administrator, delete the jobs, log out and log back in as a system administrator.

Upgrade to Version 2.5.3 from Version 1.8

Complete the instructions in the following sections to upgrade CA Clarity Agile from Spring 2010, Version 1.8 (Team and Enterprise Editions) to Winter 2011, Version 2.5.3. After the upgrade, the existing data is migrated to the latest fields.

Note: To find what version of CA Clarity Agile you are currently using, click the About link from the Agile Vision Home page.

Prepare to Upgrade CA Clarity Agile

For a successful upgrade, verify that all CA Clarity Agile users are logged out before completing the following steps:

1. Log in to CA Clarity Agile.
The CA Clarity Agile Home page appears.
2. Click the Setup link to go to the Personal Setup page on Salesforce.com.
3. Select Monitoring from the Administration Setup menu.
The Monitoring page appears.
4. Click the Scheduled Jobs link and delete the following scheduled jobs. These jobs are automatically rescheduled when you access the Agile Vision Home page after upgrading:
 - Daily Chart data point generation for Release
 - Daily Chart data point generation for Sprint
5. Select Security Controls from the Administration Setup menu and go to Sharing Settings.
The Sharing Settings page appears.
6. Click Edit to change the following settings and save your changes:
 - Migration to Private
 - Project to Private
 - User Notification to Public Read Only
7. Select Manage Users from the Administration Setup menu and go to Profiles.
8. Click Edit next to Agile Vision Super User.
9. Scroll to the Custom Object Permissions section and select the View All and Modify All check boxes for the User Notification setting.
10. Save your changes and log out.

Upgrade CA Clarity Agile from Spring 2010 (Version 1.8) to Winter 2011 (Version 2.5.3)

1. Log out of CA Clarity Agile and enter the following URL on the address bar of your browser window:

`https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tA0000000R6ZN`
2. On the Login page, enter the system administrator user name and password and click Login.
3. Enter the password provided to you for upgrading to CA Clarity Agile, Version 2.5.3 and click Submit. If you do not have the required password, contact [CA Support](#).

A summary of the upgrade appears showing the old and new versions of CA Clarity Agile.
4. Click Continue to advance through the upgrade wizard.
5. Click Next.

A security options page appears.
6. Select the security settings option to set user access by profile.
7. Set the following access levels for the corresponding profiles and click Next to continue:
 - Agile Vision Super-User access for the Agile Vision Super-User profile
 - Agile Vision User access for the Agile Vision User profile
 - Product Vision Super-User access for the Product Vision Super-User profile.
 - Product Vision User access for the Product Vision User profile.
 - Vision Super-User access for the Vision Super-User profile.
 - Vision User option for the Vision User profile.
8. Click Next to continue.

A page appears with the following check box: "Ignore Apex test failures that may cause the installed application not to function properly".

9. Select the check box.

10. Click Install.

The Processing page appears indicating that your request is in progress. When the upgrade is complete, an email notification is sent from Salesforce.com to the email address of the user you are currently logged in as. The upgrade can take over 30 minutes depending on the current load on the Force.com platform.

11. Log out and log back into CA Clarity Agile as the system administrator to allow the scheduled jobs to run properly.

12. Go to the Setup page and select Scheduled Jobs from the Monitoring menu under Administration Setup. Verify that the Submitted By user is a system administrator. If the Submitted By user is not a system administrator, delete the jobs, log out and log back in as a system administrator.

Deploy CA Clarity Agile

If Salesforce.com can automatically deploy the package, the Deploy button is disabled and you can skip this section. If the Deploy button is enabled, follow the steps in this section to deploy the package.

1. From the Agile Vision Home page, click Setup.

The Personal Setup page appears.

2. Select View Installed Packages from the App Setup menu.

3. Verify that CA Technologies - PPM, Version 2.5.3 is installed.

4. Click the CA Technologies - PPM package name.

The Package Details page appears.

5. Click Deploy in the Installed Package Detail section.

The Deploy Package page appears showing the package components.

6. Click Deploy again.

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

<https://ca-agile.na7.visual.force.com/apex/PackageSettings>

The package settings page appears.

8. If you have not purchased a license for CA Clarity Requirements, unselect the Product Vision check box and save your changes. If you have purchased the license for CA Clarity Requirements, contact [CA Support](#) for instructions on how to enable it.

Configure CA Clarity Agile

After upgrading, complete the following steps to make the new fields and objects visible on the standard Salesforce.com page layouts:

1. Log in to CA Clarity Agile and click the Setup menu.
The Personal Setup page appears.
2. Expand the Create menu and select Objects from the App Setup menu.
The Custom Objects list page appears.
3. Click Product.
The Product page appears.
4. Scroll to the Page Layouts section and click Page Layout Assignment.
The Page Layout Assignment page for the Product object appears.
5. Click Edit Assignment.
6. Select the following profiles in the table by holding down the Ctrl key and clicking each profile name:
 - Agile Vision Super-User
 - Agile Vision User
 - System Administrator
7. From the Page Layout To Use drop-down, select the Winter 11 page layout and save your changes.
8. Repeat all the steps for the following objects. For the User Story object, select the "Detailed Story Layout-Winter 11" page layout.
 - Release
 - Theme
 - User Story
9. Save your changes.
10. Access the Agile Vision Home page as follows to reschedule the scheduled jobs:
<https://ca-agile.na7.visual.force.com/apex/tophome>

Upgrade Your Data

Complete the following additional steps to finish the upgrade:

1. Enter the following URL in the address bar of your browser window:
`https://ca-agile.na7.visual.force.com/apex/aveeupgrade`
2. The Agile Vision Upgrade page appears.
3. Click Start Upgrade.
The upgrade process starts.
4. If needed, click Continue Upgrade to process further records.
When all the records are processed, the Agile Vision Upgrade page appears displaying a message that the upgrade is complete.
5. Enter the following URL on the address bar of your browser window:
`https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tA0000000R6ZN`
6. Enter the password provided to you for upgrading to CA Clarity Agile, Version 2.5.3 and click Submit. If you do not have the required password, contact [CA Support](#).
7. Follow the steps to complete the upgrade process and click Install.

Upgrade to 1.8 from Versions 1.5 and 1.7

Complete the instructions in the following sections to upgrade the following versions of CA Clarity Agile Spring 2010 editions to CA Clarity Agile, Spring 2010, Version 1.8 (Team and Enterprise Editions) :

- CA Clarity Agile, Version 1.5 (Team Edition only)
- CA Clarity Agile, Version 1.7 (Team and Enterprise Edition)

After the upgrade, the existing data is migrated to the latest fields.

The following are some examples of migrations:

- If hours are logged on a task before the upgrade, then after the upgrade, a task worklog is created.
- If comments exist in a user story before the upgrade, then after the upgrade, these comments appear in the Comments section of the user story detail rather than in the Comments field.

Install CA Clarity Agile, Version 1.8

Complete the following steps to install CA Clarity Agile, Version 1.8:

1. Log out of CA Clarity Agile and on your browser window enter the following URL:
`https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tA0000000QJe3`
2. On the Login page, enter the system administrator user name and password and click Login.
3. Enter the password provided to you for upgrading and click Submit.
The Package Installation Details page appears showing the package details and components.
4. Click Continue.
The Package Installer Agile Vision Core Step 1 page appears.
5. Click Next.
The Package Installer Agile Vision Core Step 2 page appears.
6. Select the security settings option to set user access by profile.
7. Set the following access levels for the corresponding profiles and click Next to continue:
 - Agile Vision Super-User access for the Agile Vision Super-User profile
 - Agile Vision User access for the Agile Vision User profileThe Package Installer Agile Vision Core Step 3 page appears.
8. Select the “Ignore Apex test failures that may cause the installed application not to function properly” check box.
9. Click Install.
The Processing page appears indicating that your request is in progress and you receive an email notification when the install is complete.

Deploy CA Clarity Agile

If Salesforce.com can automatically deploy the package, the Deploy button is disabled and you can skip this section. If the Deploy button is enabled, follow the steps in this section to deploy the package:

1. From the Agile Vision Home page, click Setup.
The Personal Setup page appears.
2. Select View Installed Packages from the App Setup menu.
3. Verify that Agile Vision Core package, Version 1.8 is installed.

4. Click the Agile Vision Core package name.
The Package Details page appears.
5. Click Deploy in the Installed Package Detail section.
The Deploy Package page appears showing the package components.
6. Click Deploy again.

Complete the following additional steps to finish the upgrade:

1. In the browser URL, enter "aveeupgrade" after "apex/" as follows:
`https://ca-agile.na7.visual.force.com/apex/aveeupgrade`
2. The Agile Vision Upgrade page appears.
3. Click Start Upgrade.
The upgrade process starts.
4. If needed, click Continue Upgrade to process further records.
When all the records are processed, the Agile Vision Upgrade page appears displaying a message that the upgrade is complete.

Configure CA Clarity Agile

After upgrading, complete the following steps to make the new fields and objects visible on the standard Salesforce.com page layouts:

1. Login to CA Clarity Agile and click the Setup menu.
The Personal Setup page appears.
2. Expand the Create menu and select Objects from the App Setup menu.
The Custom Objects list page appears.
3. Click the CA Clarity Agile User label.
4. Scroll to the Page Layouts section and click Page Layout Assignment.
The Page Layout Assignment page appears.
5. Click Edit Assignment.
6. Select all profiles in the table by holding down the Ctrl key and clicking each profile name.
7. From the Page Layout To Use drop-down, select the Summer 10 page layout and save your changes.

8. Repeat the all steps for all the following objects:

- Project
- Release
- Scrum Team Member
- Story Dependency
- Task
- Team
- User Story

Chapter 4: CA Clarity Agile and CA Clarity Requirements Add-ins

Consider upgrading CA Clarity Agile and CA Clarity Requirements products and the Add-ins at the same time. The following table lists the CA Clarity Agile and CA Clarity Requirements Add-in packages compatible with the different versions of CA Clarity Agile and CA Clarity Requirements products.

CA Clarity Agile and CA Clarity Requirements Products Version	Add-in for JIRA	Add-in for HP Quality Center	Add-in for CA Clarity PPM
4.1 (Winter 2013)	GEN11141010E.zip	GEN11141230E.zip	GEN11141340E.zip
3.7 (Summer 2012 SP1)	GEN09162251M.zip GEN06140936E.zip	GEN09162659M.zip GEN06141118E.zip	GEN09162829M.zip GEN06141215E.zip
3.6 (Summer 2012)	GEN06140936E.zip	GEN06141118E.zip	GEN06141215E.zip
3.5 (Spring 2012 SP1)	GEN05135013M.zip GEN01163026E.zip	GEN05135129M.zip GEN01163145E.zip	GEN05135245M.zip GEN01163301E.zip
3.4 (Spring 2012)	GEN01163026E.zip	GEN01163145E.zip	GEN01163301E.zip

This section contains the following topics:

[Download CA Clarity Agile and CA Clarity Requirements Add-Ins](#) (see page 72)

[Upgrade the CA Clarity Agile and CA Clarity Requirements Add-in for CA Clarity PPM](#) (see page 73)

[Disable CA Clarity Agile and CA Clarity Requirements Processes and Jobs](#) (see page 73)

[Install the CA Clarity Agile and CA Clarity Requirements Add-In](#) (see page 74)

[Apply the CA Clarity Agile and CA Clarity Requirements Add-In](#) (see page 74)

Download CA Clarity Agile and CA Clarity Requirements Add-Ins

This section describes the steps for downloading add-ins from [CA Support](#) for the following CA Clarity Agile and CA Clarity Requirements integrations:

- CA Clarity PPM
- JIRA
- HP Quality Center

For information about how to install the add-ins after downloading them, see the *Integration Guide*.

Follow these steps:

1. Log in to www.support.ca.com using your CA email address and password.
2. Click Download Center from the Support menu.
The Download Center page appears.
3. Select the following product information and click Go:
 - CA Clarity PPM Integration with Clarity Agile/Requirements - FORCE.COM
 - Release 4.1
 - Gen level 0000The Product Downloads page appears.
4. Scroll to the Product Components section and download the following zip files:
 - GEN11141010E.zip to download the add-in for JIRA and CA Clarity Agile Integration.
 - GEN11141230E.zip to download the add-in for HP Quality Center and CA Clarity Agile/Requirements Integration.
 - GEN11141340E.zip to download the add-in for CA Clarity PPM and CA Clarity Agile/Requirements Integration.

Upgrade the CA Clarity Agile and CA Clarity Requirements Add-in for CA Clarity PPM

The following process describes how a CA Clarity PPM system administrator can upgrade the CA Clarity Agile and CA Clarity Requirements Add-in.

1. [Disable CA Clarity Agile and CA Clarity Requirements processes and jobs](#) (see page 73).
2. [Install the latest CA Clarity Agile and CA Clarity Requirements Add-in](#) (see page 74).
3. [Apply the CA Clarity Agile and CA Clarity Requirements Add-In](#) (see page 74).

Disable CA Clarity Agile and CA Clarity Requirements Processes and Jobs

Disable jobs and processes in CA Clarity PPM to prevent any conflict while upgrading the CA Clarity Agile and CA Clarity Requirements Add-in.

Follow these steps:

1. Log in to the CA Clarity PPM application.
2. Select Reports and Jobs from the Personal menu.
3. Click Jobs and go to Scheduled Jobs and delete all scheduled instances of the following jobs:
 - Agile and Requirements Product Sync
 - Agile Timesheet Sync
 - Requirements and Task Mapping Sync
 - Requirements Role Sync
4. Verify that there are no running instances of the listed jobs.
5. Select Organizer from the Personal menu.
The action items list appears.
6. Click Processes and go to Initiated. Cancel the following process instances in Running or Aborting states.
 - Agile and Requirementsfields Locking
 - Create Requirements Mapped Task
 - Populate Agile Task Types
 - Requirements Sync Project and Task Information

Install the CA Clarity Agile and CA Clarity Requirements Add-In

Once you have downloaded the add-in packages, install the CA Clarity Agile and CA Clarity Requirements add-in.

Follow these steps:

1. Log in to the Clarity System Administration (NSA) application.
2. Shut down the CA Clarity PPM application (app) and background (bg) services.
For more information, see the *CA Clarity PPM Installation Guide*.
3. Install the CA Clarity Agile and CA Clarity Requirements Add-in in the Clarity application server,
For more information, see the *Integration Guide*.
4. Restart the Clarity app and bg services.

Apply the CA Clarity Agile and CA Clarity Requirements Add-In

The following procedure describes how to apply the CA Clarity Agile and CA Clarity Requirements add-in in CA Clarity PPM.

Follow these steps:

1. Log in to the CA Clarity PPM Administration Tool.
2. Select Add-ins from the CA Clarity Studio menu.
The add-ins list appears.
3. Click the CA Clarity Agile and CA Clarity Requirements add-in.
The add-in details appear.
4. Click Apply.
The confirm add-in update or install prompt appears.
5. Click Yes and wait for several minutes for the upgrade process to complete.
The CA Clarity Agile and CA Clarity Requirements add-in details appear displaying the status of all items as Installed.