CA Clarity Requirements

Implementation Guide

Winter 2013

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
- 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.

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.

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Chapter 1: Introduction

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

Chapter 2: Install and Configure CA Clarity Requirements

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

If you are using CA Clarity Requirements for the first time and you do not have a Salesforce.com organization, you need not complete these instructions. You can directly log in to CA Clarity Requirements using the URL and login that CA Support provides you.

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 will not have the Standard Platform profile needed to complete the installation.

This section contains the following topics:

Prepare to Install CA Clarity Requirements

Before you install either CA Clarity Requirements or CA Clarity Agile for the first time, set up the needed profiles and enable Chatter.

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 following profiles by copying the Standard Platform user profile. The Standard Platform user profile is available only if you have at least one Salesforce Platform license active.

   The table at the beginning of these steps specifies which profiles are required while installing CA Clarity Agile, CA Clarity Requirements, or both products.
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. Select the Enable check box in the Chatter Settings section.
   d. Click Save.
8. Log out from 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=04tA0000000Jwwk`

   Test environment:

   `https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000Jwwk`

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 Requirements

After the licenses are specified, complete the following steps to configure CA Clarity Agile.

Follow these steps:

1. Log in to CA Clarity Requirements 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 Requirements.

   The profile page appears.

5. Scroll to the Custom App Settings section and select the Default option for CA Clarity.
6. Save your changes.
7. Repeat the steps 3 through 5 to set CA Clarity as the default app for each new profile you created.

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

To upgrade to the current release, use the information in the following sections. When you upgrade from previous releases to the new release, consider the following items:

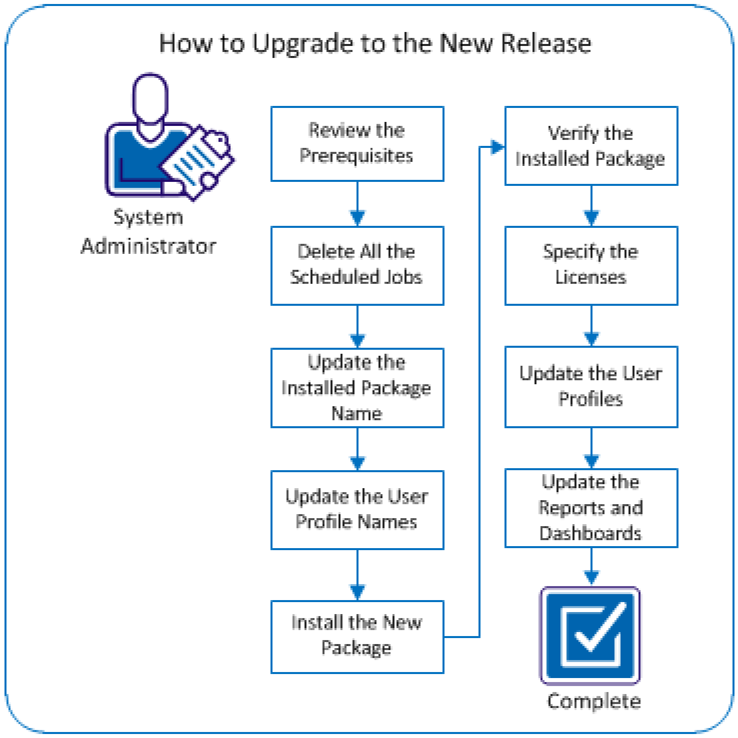
- If you have licenses for CA Clarity Agile or CA Clarity Requirements and integrate with other products such as CA Clarity PPM, upgrade the CA Clarity Agile and CA Clarity Requirements products and the Add-ins at the same time.
- Upgrade in sequential order, without skipping releases. For example, if 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 Requirements

This scenario demonstrates how a Salesforce.com user with system administrator privileges upgrades to the new release of CA Clarity Requirements. 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 Requirements to the latest release.



Perform these steps to upgrade CA Clarity Requirements:

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 name (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 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 form 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 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	AgileSuper-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 administrator to one of the following URLs:

   Production environment:

   `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000Jwwk`

   Test environment:

   `https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000Jwwk`

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.

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

   The Approve Package API Access step page appears.

5. Click Next.

   The Choose security level page appears.

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

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 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 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=04tA0000000JoGj`

   Test environment:

   `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JoGj`

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.

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

   The Approve Package API Access step page appears.

5. Click Next.

   The Choose security level page appears.

6. Select the Security Settings option to set user access by profile.
7. Set the access levels for each profiles as mentioned in the preceding table.
8. Click Next.
9. 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 use 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 Technologies - PPM, Version 3.7 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.

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:
      - Product Vision Super-User
      - Product 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 Upgrade Jobs

Run the upgrade jobs to migrate your existing data for the new features in 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 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, please check your Junk Email folder.

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

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

Important! Plan to complete upgrade to CA Clarity Requirements 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.

Perform these steps to upgrade CA Clarity Requirements:

1. Delete all scheduled jobs (see page 19).
2. Install the new package (see page 32).
3. Verify the installed package (see page 12).
4. Specify the Vision licenses (see page 13).
5. Update user profiles.
6. Run the upgrade jobs

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 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 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=04tA0000000JoGj`

   Test environment:

   `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JoGj`

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.

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

   The Approve Package API Access step page appears.

5. Click Next.

   The Choose security level page appears.

6. Select the Security Settings option to set user access by profile.
7. Set the access levels for each profiles as mentioned in the preceding table.
8. Click Next.
9. 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 use 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 Technologies - PPM, Version 3.6 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.

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:
      - Product Vision Super-User
      - Product 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 Upgrade Jobs

Run the upgrade jobs to migrate your existing data for the new features in 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 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, please check your Junk Email folder.

How to Upgrade to CA Clarity Requirements Spring 2012 Service Pack 1 from CA Clarity Requirements Spring 2012

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

Important! Plan to complete upgrade to CA Clarity Requirements 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
5. 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:

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

   Production environment:

   `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JlAS`

   Test environment:

   `https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JlAS`

2. 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 CA Clarity Requirements Spring 2012 from CA Clarity Requirements Winter 2012

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

Important! Plan to complete upgrade to CA Clarity Requirements Spring 2012, at the same time that you upgrade to CA Clarity Agile 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 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. 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 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:

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

   Production environment:

   `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JlAS`

   Test environment:

   `https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JlAS`

2. 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 CA Clarity Requirements Winter 2012, Service Pack 2, from Winter 2012, Service Pack 1

This section describes the upgrade of CA Clarity Requirements to Winter 2012, Service Pack 2 from Winter 2012, Service Pack 1.

Important: Plan to complete upgrade to CA Clarity Requirements Winter 2012, Service Pack 2 at the same time that you complete the upgrade to CA Clarity Agile and the CA Vision Add-In for CA Clarity PPM so that the release levels are the same.

Required: Upgrade from Winter 2012, Service Pack 1. If you have a previous release installed, upgrade sequentially, without skipping releases.

Follow these steps:

1. Log in to Salesforce.com as System Administrator.
2. Install the Winter 2012, Service Pack 2 Release (see page 44).
3. Deploy the package (see page 45).

Install CA Clarity Requirements

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 for each user profile. You set the access level in the following steps.

User Profile and Access Level	For CA Clarity Requirements	For CA Clarity Requirements and CA Clarity Agile
Agile Vision Super-User		X
Agile Vision User		X
Product Vision Super-User	X	X
Product Vision User	X	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. 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=04tA0000000JjNw
```

3. On the Login page, enter the system administrator user name and password and click Login.

   Enter the password provided to you for installing the new version and click Submit. If you do not have the required password, contact CA Support.

4. Verify the version of CA Technologies - PPM package you are installing and the publisher as follows:

   - Winter 2012 C2
   - 3.3
   - CA Technologies

5. Click Next to advance through the wizard.

   A security options page appears.

6. Select the security settings option to set user access by profile.

7. Set the access levels 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.

8. Click Next to continue.

9. 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 Requirements

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 Agile Vision 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 installed.

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

   The products are now fully deployed.

How to Upgrade to CA Clarity Requirements Winter 2012 Service Pack 1 from Winter 2012

This section describes the upgrade of CA Clarity Requirements to Winter 2012 Service Pack 1 from Winter 2012 release.

Important: Plan to complete upgrade to CA Clarity Requirements Winter 2012 Service Pack 1 at the same time that you complete the upgrade to CA Clarity Agile and the CA Vision Add-In for CA Clarity PPM so that the release levels are the same.

Required: Upgrade from Winter 2012 release. If you have a previous release installed, upgrade sequentially, without skipping releases.

Follow these steps:

1. Log in to Salesforce.com as System Administrator
2. Delete all scheduled jobs in Salesforce.
3. Install the new package.
4. Update user profiles (see page 49)
5. Run the upgrade jobs (see page 50)

Install CA Clarity Requirements

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

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. Log in to one of the following URLs:

   Production environment:

   `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JlAS`

   Test environment:

   `https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JlAS`

2. Enter the login credentials and click Login.

   The Package Installation Details page opens.

3. Enter the password that is provided to you for installing the new version and click Submit. If you do not have a password, contact CA Support.

4. Verify the version of the CA Technologies - PPM package that you are installing and the name of the publisher:

   Version Name

   Winter 2012 C1

   Version Number

   3.2

   Publisher

   CA Technologies

5. Click Continue.-

The Handle Component Name Conflicts page appears.

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

   The Approve Package API Access step page appears.

7. Set Extended Object Permissions.

   Select Read, Create, and Edit permissions for all the objects.

8. Click Next.

   The Choose security level page appears.

9. Select the Security Settings option to set user access by profile.

10. 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.

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. When the installation is complete, Salesforce.com sends an 'Install Successful' email to the email address of the user that you are currently logged in as.

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

   The products are now fully deployed.

Update User Profiles

This procedure explains how to update Apex Class access for the following profiles:

- Agile Vision Super User
- Agile Vision User
- Product Vision Super User
- Product Vision User
- Vision Super User
- Vision User

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, and from Manage Users, and click Profiles.

   The profiles list page appears.

3. To update object access for a profile, complete the following steps:

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

      The profile page appears.

   b. Hover over the Enabled Apex Class Access link and then click Edit.

      The Enable Apex Class Access page opens.

   c. Select **XMLSObjectField** from the Available Apex Classes and click Add (right arrow) to add the class to the Enabled Apex Classes.

   d. Save your changes.

4. Repeat for all profiles.

Run the Upgrade Jobs

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 heading) 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 Requirements, run the following jobs:

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

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

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

How to Upgrade to CA Clarity Requirements Winter 2012, Version 3.0, from Spring 2011, Version 2.10

This section describes the upgrade of a Winter 2012 instance that has both CA Clarity Agile and CA Clarity Requirements enabled to a Spring 2011 release, with both CA Clarity Agile and CA Clarity Requirements enabled.

Important: Plan to complete upgrade to CA Clarity Agile and CA Clarity Requirements Winter 2012 at the same time that you complete the upgrade to the CA Vision Add-In for CA Clarity PPM so that the release levels are the same.

Required: Upgrade from Version 2.10. If you have a previous release installed, upgrade to V2.10 before upgrading to V3.0.

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 (see page 51).
5. Run the upgrade jobs.

Update User Profiles

This procedure explains how to update Apex Class access for the following profiles:

- Agile Vision Super User
- Agile Vision User
- Product Vision Super User
- Product Vision User
- Vision Super User
- Vision User

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.

To update user profiles

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. To update object access for a profile, complete the following steps:

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

      The profile page appears.

   b. Hover over the Enabled Apex Class Access link and then click Edit.

      The Enable Apex Class Access page opens.

   c. Select **XMLSObjectField** from the Available Apex Classes and click Add (right arrow) to add the class to the Enabled Apex Classes.

   d. Click Save and Back to List: Users.

4. Repeat for all profiles.

Run the Upgrade Jobs (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 heading) 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 5 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 Requirements, run the following jobs:

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

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

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

How to Upgrade to CA Clarity Requirements Spring 2011 from Winter 2011 A1

This section describes the upgrade of a Winter 2011 A1 instance that has both CA Clarity Agile and CA Clarity Requirements enabled to a Spring 2011 release.

1. Install and deploy the Spring 2011 Release.

   Follow the CA Clarity Agile and CA Clarity Requirements installation instructions to install the Spring 2011 release package, and then deploy the package.
2. Copy custom values to picklist values (see page 54).
3. Update user profiles.
4. Upgrade the Inbox (see page 61).
5. Run the upgrade jobs (see page 61).

Copy Custom Values to Picklist Values

This procedure describes how to migrate any custom values for Requirement State, Requirement Category, and Product State to picklist values.

Follow these steps:

1. Log in as a system administrator.
2. List all custom requirement states, requirement categories, and product states in your org.

   You need the list of values to compare against the new picklist values. You can find all the available states and categories by completing the following steps:

   a. Click Configure from the Administration menu.

   b. Click Requirement State, Requirement Category, or Product State.

   c. Make note of the values that are listed for each value type.
3. If you find custom values have been created for any of the value types, open the Custom Objects page to migrate the values by completing the following steps:

   a. Click Setup.

      The Personal Setup page appears.

   b. In the App Setup menu, click and expand Create, then click Objects.

      The Custom Objects page appears.
4. With the Custom Objects page open, complete the following steps to update Requirement State values:

   a. Locate the Requirement custom object and click the Requirement link.

      The Requirement (Managed) page appears.

   b. In the Custom Fields & Relationships section, locate and click the State link.

      The State (Managed) page appears.

   c. In the Picklist Values section, compare the values that you find to the requirement states on the list you created.

   d. If requirement states do not appear in the Picklist Values section, click New and add the missing requirement state.

      Note: Add each custom requirement state.

5. With the Custom Objects page open, complete the following steps to update Requirement Category values:

   a. Locate the Requirement custom object and click the Requirement link.

      The Requirement (Managed) page appears.

   b. In the Custom Fields & Relationships section, locate and click the Category link.

      The Category (Managed) page appears.

   c. In the Picklist Values section, compare the values that you find to the requirement categories on the list you created.

   d. If requirement categories do not appear in the Picklist Values section, click New and add the missing requirement category.

      Note: Add each custom requirement category.

6. With the Custom Objects page open, complete the following steps to update Product State values:

   a. Locate the Product custom object and click the Product link.

      The Product (Managed) page appears.

   b. In the Custom Fields & Relationships section, locate and click the State link.

      The State (Managed) page appears.

   c. In the Picklist Values section, compare the values that you find to the product states on the list you created.

   d. If product states do not appear in the Picklist Values section, click New and add the missing product state.

      Note: Add each custom product state.

Update User Profiles

This procedure explains how to update basic object access and page access for the following profiles:

- Agile Vision Super User
- Agile Vision User
- Product Vision Super User
- Product Vision User
- Vision Super User
- Vision User

The steps for updating are provided in the procedure, and the object access and page access values to update for each profile are provided in the sections that follow the procedure.

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. To update object access for the profile, complete the following steps:

   a. Locate the user profile in the list and click Edit.

      The profile edit page appears.

   b. Scroll to the Custom Object Permissions section of the user profile and make the additional access selections or deletions shown in the table.

      Additions are marked with an *X*, and removals are indicated by text.

   c. Click Save when you are done.

      The profiles list page appears.

4. To update page access for the profile, complete the following steps:

   a. Locate the user profile in the profiles list and click the name of the user profile.

      The profile detail page appears.

   b. Scroll to the Enabled Visualforce Page Access section and click Edit.

   c. Use the arrow keys to add or remove pages in the Enabled Visualforce Pages list box.

      The pages to add or delete are listed in each profile section following this procedure.

   d. Click Save when you are done, then click *Back to List: Profiles*.

Agile Vision Super User

Object Access

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
FilterFields	X	X	X	X		
Filters	X	X	X	X		

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Release Resources	X					
User_Story_ Release	X	X	X	X		

Page Access

- Add: TreeEditorGridJs

Agile Vision User

Object Access

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
FilterFields	X	X	X	X		
Filters	X	X	X	X		
Release Resources	X					
Sprint Teams			Remove check-mark			
User_Story_ Release	X	X	X	X		

Page Access

- Add: TreeEditorGridJs

Product Vision Super User

Object Access

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
FilterFields	X	X	X	X		
Filters	X	X	X	X		

Page Access

- No change to page access.

Product Vision User

Object Access

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
FilterFields	X	X	X	X		
Filters	X	X	X	X		
Geographies	X	X	X	X		
Industries	X	X	X	X		

Page Access

- Add: TopThemesJs

Vision Super User

Object Access

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria					Remove check-mark	Remove check-mark
Backlog Filters					Remove check-mark	Remove check-mark
Backlog Filter Items					Remove check-mark	Remove check-mark
Epics					Remove check-mark	Remove check-mark
FilterFields	X	X	X	X		
Geographies	X	X	X	X	X	X
Industries	X	X	X	X	X	X

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Filters	X	X	X	X		
Release Resources		Remove check-mark	Remove check-mark	Remove check-mark	Remove check-mark	Remove check-mark
Story Dependencies					Remove check-mark	Remove check-mark
Tasks					Remove check-mark	Remove check-mark
Task Worklogs					Remove check-mark	Remove check-mark
Teams Daily Data					Remove check-mark	Remove check-mark
Test Case Steps	X					
Themes					Remove check-mark	Remove check-mark
User_Story_ Release	X	X	X	X		
User Notification					X	X
User Stories					Remove check-mark	Remove check-mark

Page Access

- Remove: AveeUpgrade

Vision User

Page Access

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Agile Vision Users			X			
FilterFields	X	X	X	X		
Geographies	X	X	X	X		
Industries	X	X	X	X		
Filters	X	X	X	X		
Release Resources		Remove check-mark	Remove check-mark	Remove check-mark		
Sprint Teams			Remove check-mark			
Test Case Steps	X					
Themes					Remove check-mark	Remove check-mark
User_Story_ Release	X	X	X	X		

Page Access

- Add: AgilePlannerUserDetail
- Add: AgilePlannerUserEdit
- Add: PersonaDetail
- Add: PersonaEdit
- Add: SprintTeamDetail
- Add: TaskDetailJs
- Add: UserStoryCommentDetail
- Remove: AveeUpgrade
- Remove: TopAgilePlannerUser
- Remove: TopCategories
- Remove: TopSprintList

Upgrade the Inbox

If CA Clarity Ideation is installed, synchronize all ideas between CA Clarity Requirements and CA Clarity Ideation before ideas can be linked to products and requirements in CA Clarity Ideation.

To synchronize ideas, open the Product Vision menu and select Inbox from the Overview menu. An information message appears indicating that ideas are being synchronized. It could take a few minutes for the sync job to complete.

Run the Upgrade Jobs

To run the upgrade jobs

1. Log in as a system administrator
2. Click Setup.

   The Personal Setup page appears.
3. Click Spring_2011_Release to display the menu and click System Log.

   The System Log page appears.

4. Copy following statements into the text fields in the Execute Apex section:
```
Database.executeBatch(new
ca_agile.IdeaVisionDataMigrationStep1Job('ca_agile'), 200);
Database.executeBatch(new
ca_agile.IdeaVisionDataMigrationStep2Job('ca_agile'), 200);
Database.executeBatch(new
ca_agile.RequirementCustomValueDataMigrationJob('ca_agile'), 200);
Database.executeBatch(new
ca_agile.ProductCustomValueDataMigrationJob('ca_agile'), 200);
Database.executeBatch(new ca_agile.RequirementIDDataMigrationJob('ca_agile'),
200);
```
5. Click Execute.

   An email notification is sent when each job completes. When the last email is received, data migration is done.

Upgrade to CA Clarity Requirements Version 2.10 from Version 2.8

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

Required: Upgrade from Version 2.8. If you have a previous release installed, 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 Vision Add-In for CA Clarity PPM so that the release levels are the same.

The upgrade process for 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 Requirements.
2. Deploy CA Clarity Requirements.

Prepare to upgrade CA Clarity Requirements

Complete the following configuration steps before upgrading CA Clarity Requirements from Spring 2011 to Spring 2011 Patch.

Follow these steps:

1. From the CA Clarity Requirements 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 Requirements

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=04tA0000000Jhnl`

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 Requirements 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 Requirements.

4. Click Continue to advance through the upgrade wizard and then click Next.

   A security options page appears.

5. Select the security settings option to set user access by profile.

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

Set this Access Level	For this Profile
Product Vision User	Product Vision User
Vision Super-User	Vision Super-User
Vision User	Vision User

6. Click Next to continue.
7. Select the following check box: Ignore Apex test failures that could cause the installed application not to function properly.
8. 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 currently logged in username.

   The upgrade can take over 30 minutes depending on the current load on the Force.com platform.
9. Log out and log back in as the system administrator to allow the scheduled jobs to run properly.
10. Go to the Setup page and select Scheduled Jobs from the Monitoring menu under Administration Setup.
11. 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 Requirements

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 steps and click Save:
   - If you have 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 Requirements is now fully deployed.

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

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 0000

   The 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 69).
2. Install the latest CA Clarity Agile and CA Clarity Requirements Add-in (see page 70).
3. Apply the CA Clarity Agile and CA Clarity Requirements Add-In (see page 70).

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.

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

Configure the CA Clarity Agile and CA Clarity Requirements Add-in so that you can use it with CA Clarity PPM.

Follow these steps:

1. Open the project object by completing the following steps:

   a. In the CA Clarity PPM Administration Tool, select Objects from the CA Clarity Studio menu.

   b. Filter using the Project object name.

      The objects list appears.

   c. Click the Project object to open it.

2. Set up the Integration Status section of the Project Properties view by completing the following steps:

   a. Click Views in the content menu and then click the Layout:Edit link for the Project Properties view.

      The property layout appears.

   b. Expand the Agile and Requirements project properties and then expand the Integration Status section.

   c. Click the Properties and Layout icon for the Integration Status section.

      The section properties appear.

   d. Click Submit.

      The property layout appears.

   e. Click Back.

      The object definition view appears.

3. Click Publish to publish the view.

   A confirmation prompt appears. Click Yes to confirm publishing the view.

4. Reschedule the following jobs to run at the predefined levels:
   - Agile and Requirements Product Sync
   - Agile Worklog Sync
   - Requirements and Task Mapping Sync
   - Requirements Role Sync

5. Select Processes from the Data Administration menu.

   The available processes list appears.

6. Click open the following processes and then click Validation from the content menu.
   - Agile and Requirements fields Locking
   - Create Requirements Mapped Task
   - Populate Agile Task Types
   - Requirements Sync Project and Task Information

7. Select all the validation objects and click Validate All and Activate.

   When validation completes, the status of the objects changes to Validated and mode changes to Active.

8. Restart the Clarity app and bg services.

Chapter 5: Make CA Clarity Requirements Fully Functional

This section contains the following topics:

How to Set Up CA Clarity Requirements after a CA Clarity Agile-only Upgrade

This section describes how to make CA Clarity Requirements fully functional when including it with an upgraded CA Clarity Agile-only organization.

After you purchase the CA Clarity Requirements license, enable it on the Package Settings page. Create the following user profiles that are not automatically available for a CA Clarity Agile–only organization.

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

Best practice: Create the profiles in the order shown.

Create a Requirements User Profile

To create a Requirements User Profile:

1. Open the User Profiles page by completing the following actions:
   a. Click Setup on the application header.
   b. In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

      The list page appears.
2. Click New.

   The Clone Profile page appears.

3. Complete the following fields:

   Existing Profile

   Specifies the existing user profile on which you want to base the new profile. Select Standard Platform User.

   Profile Name

   Indicates the name of the new user profile. Enter Requirements User.

4. Click Save.

   The profile detail page for the new user appears.

5. In the Custom Field-Level Security subsection of the Field-Level Security section, complete settings for the following items by clicking View, and then clicking Edit to change the default settings. When the changes for an item are done, click Save and click Return to Profile.

   Product

   Read-Only column. Select the following check boxes: External ID (Internal), Jira Project ID (Internal), QC Project (Internal).

   Release

   Read-Only column. Select the following check box: External ID.

   User Story

   Read-Only column. Select the following check box: External ID.

6. At the top of the profile detail page, click Edit.

   The edit page appears.

7. In the Custom App Settings section, select the Default option for the CA Clarity field.

8. In the Custom Tab Settings subsection of the Tab Settings section, select Default On for the CA Technologies PPM field and select Tab Hidden for all other custom tabs.

9. In the Administrative Permissions section, select API Enabled, Send Outbound Messages, and View Setup and Configuration. Leave all other check boxes in this section cleared.

10. Click Save.

    The profile detail page appears.

11. In the Record Type Settings section of the profile detail page, click the Edit link next to User Stories and complete the following actions:

    a. Select Master in the Selected Record Types list and click the left (Remove) arrow.

    b. Select Issue and UserStory in the Available Record Types list and click the right (Add) arrow.

    c. In the Default field, select User Story.

d. Click Save.

   The profile detail page appears.

12. At the top of the profile detail page, click Edit.

    The edit page appears.

13. In the Custom Object Permissions section, select the check boxes shown in the Object Access table that follows this procedure.

14. Click Save.

    The profile detail page appears.

15. In the Enabled Apex Class Access section of the profile detail page, click Edit and remove all Apex classes except the following classes:

    ■ OrgProvisioningDataMigrationJob

    ■ OrgProvisioningDataMigrator

16. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.

17. Add the Visualforce pages listed in the Page Access table that follows this procedure to the Enabled Visualforce Pages list. You can select them in the Available Visualforce Pages list and can move them to the Selected list.

18. Click Save.

Requirements User Object Access and Page Access

Object Access

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Agile Users	X					
Backlog Filters	X					
Backlog Filter Items	X					
Baselines	X	X	X	X		
Baseline Differences	X	X	X	X		
Categories	X					
Comments						
Companies	X	X	X	X		
Epics						

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Features	X	X	X	X		
FilterFields	X	X	X	X		
Geographies	X	X	X	X		
Inboxes	X	X	X	X		
Industries	X	X	X	X		
Filters	X	X	X	X		
Master Releases	X	X	X	X	X	
Master Release Product	X	X	X	X	X	
Master Release Resources	X					
Migrations						
Products	X	X	X	X		
Product Features						
Product Inboxes	X	X	X	X		
Product Personas	X	X	X	X		
Product Products						
Product Sources	X	X	X	X		
Product States	X					
QC Folders						
QC Projects						
Releases	X	X	X	X		
Release Resources	X	X	X	X		
Release Snapshot Details	X	X	X	X		
Requirements	X	X	X	X		
Requirement ClarityTasks	X	X	X	X		
Requirement Features	X	X	X	X		
Requirement Flat						
Requirement Idea	X	X	X	X		

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Requirement Inboxes	X	X	X	X		
Requirement Master Releases	X	X	X	X	X	
RequirementOwners	X	X	X	X		
RequirementPersonas	X	X	X	X		
RequirementProduct	X	X	X	X		
RequirementReleases	X	X	X	X		
Requirement Roles	X	X	X	X		
Requirement Source	X	X	X	X		
Requirement States	X					
Requirement UseCases	X	X	X	X		
Roles	X					
Sections	X	X	X	X	X	
Sources	X	X	X	X		
Source_Inbox						
Sprints						
Sprint Teams						
Story Dependencies						
Tasks						
Team Daily Data						
Team Members						
Test Cases						
Test Case Steps						
Themes						
Traceability Matrixes	X	X	X	X		
Use Cases						
User_Story_ Release						

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
User_Story_ Theme						
User Notification						
User Stories						
Views	X	X	X	X	X	
View Fields	X	X	X	X	X	
Virtual Wall Color Mapping						

Page Access

Note: The organization prefix is not included in the page name in the list.

About
AcceptanceCriteriaDetail
AcceptanceCriteriaEdit
BasicSelectorDataSource
BlankChartData
Chatterfeeds
ConfigModalJs
CurrencyFormattingJS
DetailInterior
ExtActionStatusPage
FeatureDetail
FeatureDetailJs
FeatureEdit
FilterWindowJs
ForceUserSelectorDataSource
InLineEditFunction
InboxDetail
LicenseError
ListTemplate
LoadMaskJs
MasterTemplate
MasterTemplateJs
MultiValuedLookupJs
PageBlockCell
PersonaDetail
PersonaDetailJs
PersonaEdit
PickerJs
ProductDetailJs
ProductJs
ProjectDetail
ProjectEdit
ReleaseDetail
ReleaseDetailJs
ReleaseEdit
RequirementDetail
RequirementDetailJs
RequirementEdit
RequirementMerge
RequirementSelectorDataSource
SearchResults
SourceDetail
SourceDetailJs
SourceEdit
TestCaseTreeSelectorDataSource
TopAgilePlannerUser
TopAgilePlannerUserJs
TopFeatures
TopFeaturesJs
TopHome
TopHomeJs
TopInboxes
TopPVDashboards
TopPVHome
TopPersonas
TopProjects
TopProjectsJs
TopReleases
TopReleasesJs
TopRequirements
TopRequirementsJs
TopSources
TopThemesJs
TreeEditorGridJs
UserSelectorDataSource
VelocityChartData
coreJs

Create a Requirements Super-User Profile

The Requirements Super-User profile is based on the Requirements User. The selections that are made for the Requirements User are therefore already made for this user. This procedure describes the additional settings that are required for the super-user.

To create a Requirements Super-User Profile

1. Open the User Profiles page by completing the following actions:
    a. Click Setup on the application header.
    b. In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

        The list page appears.
2. Click New.

    The Clone Profile page appears.
3. Complete the following fields:

    Existing Profile

    Specifies the existing user profile on which you want to base the new profile. Select Requirements User.

    Profile Name

    Indicates the name of the new user profile. Enter Requirements Super-User.
4. Click Save.

    The profile detail page for the new user appears.
5. Click Edit at the top of the profile detail page.
6. In the Custom Object Permissions section, make the additional selections shown in the Object Access table that follows this procedure.
7. Click Save.

    The profile detail page appears.
8. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.

9. Add the Visualforce pages listed in the Page Access table that follows this procedure to the Enabled Visualforce Pages list. You can select them in the Available Visualforce Pages list and can move them to the Selected list.

10. Click Save.

Requirements Super-User Object Access and Page Access

Object Access

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Agile Users		X	X	X	X	X
Backlog Filters						
Backlog Filter Items						
Baselines						
Baseline Differences						
Categories						
Comments						
Companies						
Epics						
Features						
FilterFields						
Geographies					X	X
Inboxes						
Industries					X	X
Filters						
Master Releases						X
Master Release Product						X
Master Release Resources						
Migrations						

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Personas					X	X
Persona Sources					X	X
Products						
Product Features	X	X	X	X		
Product Inboxes						
Product Personas						
Product Products						
Product Sources						
Product States		X	X	X		
QC Folders						
QC Projects						
Releases						
Release Resources						
Release Snapshot Details						
Requirements						
Requirement ClarityTasks						
Requirement Features						
Requirement Flat						
Requirement Idea						
Requirement Inboxes						
Requirement Master Releases						X
Requirement Personas						
Requirement Product						
Requirement Roles					X	X
Requirement Source						

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Requirement States						
Requirement UseCases						
Roles		X	X	X	X	X
Sections						X
Sources					X	X
Source_Inbox						
Sprints						
Sprint Teams						
Story Dependencies						
Tasks						
Task Worklogs						
Teams						
Teams Daily Data						
Team Members						
Test Cases						
Test Case Steps						
Themes						
Traceability Matrixes						
Use Cases						
User_Story_ Release						
User_Story_ Theme						
User Notification						
User Stories						
Views						X
View Fields						X

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Virtual Wall Color Mapping						

Page Access

Note: The organization prefix is not included in the page name in the list.

AgilePlannerUserDetail

AgilePlannerUserEdit

CustomFieldConfiguration

MasterReleaseDetail

MasterReleaseEdit

PropertyViewConfiguration

RoleDetail

RoleEdit

TopMasterReleases

TopRoles

TestChartComponentPage

Create an Agile/Requirements User Profile

The Agile/Requirements User profile is based on the Requirements User. The selections that are made for the Requirements User are therefore already made for this user. This procedure describes the additional settings that are required when you create the Agile/Requirements User.

To create a Agile/Requirements User Profile

1. Open the User Profiles page by completing the following actions:
   a. Click Setup on the application header.
   b. In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

      The list page appears.
2. Click New.

   The Clone Profile page appears.

3. Complete the following fields:

   Existing Profile

   Specifies the existing user profile on which you want to base the new profile. Select Requirements User.

   Profile Name

   Indicates the name of the new user profile. Enter Agile/Requirements User.

4. Click Save.

   The profile detail page for the new user appears.

5. Click Edit at the top of the profile detail page.
6. In the Custom Object Permissions section, make the additional selections shown in the Object Access table that follows this procedure.
7. Click Save.

   The profile detail page appears.

8. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.
9. Add the Visualforce pages listed the Page Access table that follows this procedure to the Enabled Visualforce Pages list. You can select them in the Available Visualforce Pages list and can move them to the Selected list.
10. Click Save.

Agile/Requirements User Object Access and Page Access

Object Access

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria	X	X	X	X		
Agile Users			X			
Backlog Filters		X	X	X		
Backlog Filter Items		X	X	X		
Baselines						
Baseline Differences						
Categories						
Comments	X	X	X	X		

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria	X	X	X	X		
Companies						
Epics	X	X	X	X		
Features						
FilterFields						
Geographies						
Inboxes						
Industries						
Filters						
Master Releases						
Master Release Product						
Master Release Resources						
Migrations						
Personas						
Persona Sources						
Products						
Product Features	X	X	X	X	X	X
Product Inboxes						
Product Personas					X	X
Product Products						
Product Sources						
Product States						
QC Folders						
QC Projects						
Releases						
Release Resources						

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria	X	X	X	X		
Release Snapshot Details						
Requirements						
Requirement ClarityTasks						
Requirement Features						
Requirement Flat						
Requirement Idea						
Requirement Inboxes	X	X	X	X		
Requirement Master Releases						
Requirement Personas						
Requirement Product						
Requirement Releases						
Requirement Roles						
Requirement Source						
Requirement States						
Requirement UseCase						
Roles						
Sections						
Sources						
Source_Inbox						
Sprints	X					
Sprint Teams	X		X			
Story Dependencies	X	X	X	X		
Tasks	X	X	X	X		
Task Worklogs	X	X	X	X		
Teams	X		X			

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria	X	X	X	X		
Teams Daily Data	X	X	X	X		
Team Members	X	X	X	X		
Test Cases	X					
Test Case Steps	X					
Themes	X	X	X	X		
Traceability Matrixes					X	X
Use Cases	X	X	X	X		
User_Story_ Release	X	X	X	X		
User_Story_ Theme	X	X	X	X		
User Notification	X	X	X	X		
User Stories	X	X	X	X		
Views						
View Fields						
Virtual Wall Color Mapping	X	X	X	X		

Page Access

Note: The organization prefix is not included in the page name in the list.

AgilePlannerUserDetail
AgilePlannerUserEdit
BacklogDetail
BacklogDetailJs
BacklogEdit
BurndownHoursChartData
BurndownPointChartData
ColorFieldJs
DeactivateTeamWithFutureSprints
EpicDetail
EpicEdit
EpicSelectorDataSource
MasterReleaseDetail
MasterReleaseEdit
RowExpanderJs
ScrumTeamDetailPage
SprintDetail
SprintDetailJs
SprintDetail_UserStories_DS
SprintEdit
StateList
StoryDependencyDetail
StoryDependencyEdit
StorySelectorDataSource
TaskDetail
TaskDetailJs
TaskEdit
TaskNew
TaskWorklogDetail
TaskWorklogDetailJs
TaskWorklogEdit
TeamAddSprints
TeamDetail
TeamEdit
TeamMemberDetail
TeamMemberEdit
TeamNew
TestCaseDetail
TestChartComponentPage
ThemeDetail
ThemeEdit
TopBacklogList
TopBacklogPlanning
TopBacklogPlanningJs
TopCalendar
TopDashboardJs
TopDashboards
TopDocumentation
TopEpicList
TopEpicPlanning
TopEpicPlanningJs
TopSprintsJs
TopTeamMembers
TopTeams
TopTeamsJs
TopThemes
UserStoryCommentDetail
UserStoryCommentDetailJs
UserStoryCommentEdit

Create a Agile/Requirements Super-User Profile

The Agile/Requirements Super-User profile is based on the Agile/Requirements User profile. The selections that are made for the Agile/Requirements Super-User are therefore already made for this user. This procedure describes the additional settings that are required when you create the Agile/Requirements Super-User profile.

Follow these steps:

1. Open the User Profiles page by completing the following actions:
   a. Click Setup on the application header.
   b. In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

      The list page appears.
2. Click New.

   The Clone Profile page appears.
3. Complete the following fields:

   Existing Profile

   Specifies the existing user profile on which you want to base the new profile. Select Agile/Requirements User.

   Profile Name

   Indicates the name of the new user profile. Enter Agile/Requirements Super-User.
4. Click Save.

   The profile detail page for the new user appears.
5. Click Edit at the top of the profile detail page.
6. In the Custom Object Permissions section, make the additional selections shown in the Object Access table that follows this procedure.
7. Click Save.

   The profile detail page appears.
8. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.
9. Add the Visualforce pages listed the Page Access table that follows this procedure to the Enabled Visualforce Pages list. You can select them in the Available Visualforce Pages list and can move them to the Selected list.

10. Click Save.

Agile/Requirements Super-User Object Access and Page Access

Object Access

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Agile Users		X		X	X	X
Backlog Filters						
Backlog Filter Items						
Baselines					X	X
Baseline Differences						
Categories					X	X
Comments						
Companies					X	X
Epics						
Features					X	X
FilterFields						
Geographies					X	X
Inboxes						
Industries					X	X
Filters						
Master Releases						X
Master Release Product						X
Master Release Resources						
Migrations						
Personas					X	X
Persona Sources					X	X

Basic Access					Data Administration	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Products						X
Product Features					X	X
Product Inboxes						
Product Personas						
Product Products						
Product Sources					X	X
Product States					X	X
QC Folders						
QC Projects						
Releases					X	X
Release Resources						
Release Snapshot Details					X	X
Requirements					X	X
Requirement ClarityTasks					X	X
Requirement Features						
Requirement Flat						
Requirement Idea						
Requirement Inboxes						
Requirement Master Releases					X	X
Requirement Personas					X	X
Requirement Product					X	X
Requirement Releases					X	X
Requirement Roles					X	X
Requirement Source					X	X
Requirement States					X	X

Basic Access					**Data Administration**	
Object	**Read**	**Create**	**Edit**	**Del**	**View All**	**Modify All**
Acceptance Criteria						
Requirement UseCase					X	X
Roles		X	X	X	X	X
Sections					X	X
Sources					X	X
Source_Inbox						
Sprints		X	X	X	X	X
Sprint Teams		X		X	X	X
Story Dependencies						
Tasks						
Task Worklogs						
Teams		X		X	X	X
Teams Daily Data						
Team Members					X	X
Test Cases						
Test Case Steps						
Themes						
Traceability Matrixes					X	X
Use Cases					X	X
User_Story_ Release						
User_Story_ Theme						
User Notification					X	X
User Stories						
Views					X	X
View Fields					X	X
Virtual Wall Color Mapping					X	X

Page Access

Note: The organization prefix is not included in the page name in the following list.

AgilePlannerUserDetail

AgilePlannerUserEdit

CustomFieldConfiguration

Integration

PropertyViewConfiguration

RoleDetail

RoleEdit

SprintTeamDetail

SprintTeamEdit

TopAgilePlannerUser

TopMasterReleases

TopReports

TopRoles

TopSprintList

TopSprintPlanning