Installation Guide

Ultimate Edition 26.3

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Installation

This section provides instructions for installing, upgrading, and uninstalling Agility Ultimate edition. It is strongly recommended that you read the following information before installing this product. Refer to the correct section for your specific installation instructions.

Overview

Installing Agility consists of 3 steps:

1. **Verify the server meets the minimum System Requirements:** see the System Requirements section for a complete list of requirements for both server and client machines.
2. **Install Agility:** see the Installing Agility section below for specific steps.
3. **(Optional) Install Agility DatamartLoader & Agility Analytics:** see the Installing Agility Analytics section below.
4. **Verify the installation:** see the Verify Installation section below for specific steps.

For information about upgrading your Agility system and other ongoing maintenance, see the Ongoing Maintenance section.

Need Installation Help?
View the Agility Getting Started Guides to see more detailed walkthroughs and search for common questions.

Step 1. System Requirements

See the full System Requirements section for detailed requirements. Agility installation requires a windows server complete with IIS, SQL Server and .Net.

Special Considerations - the following settings are required:

- Microsoft SQL Server security authentication must be set to "**SQLServer and Windows**".
- The application requires Agility client browsers to **accept cookies**.
- Ensure that IIS is allowing .net 4.0 to serve content. With IIS7, you need to go into **ISAPI & CGI restrictions** at the server level and ensure the **ASP.NET v4.0** is set to **'Allowed'**.

Step 2. Installing Agility Core

A. Basic Install

To install a new Agility Core system and create a fresh new database, please follow these steps:

- Run the VersionOne setup .EXE program.
- Follow the instructions in the setup program. See Agility Core Installation for a detailed walkthrough of the steps.
- Select OK once the installation has completed.
- If you have a Customer License (.lic) file, copy it into the webserver (ApplicationName)\bin directory and remove the Trial license file. A new license file is required for each new annual release (e.g. 21.x vs. 22.x), but not required for upgrades within a given annual level (e.g. 21.2 vs 21.3).

B. Other options for Installation

i. Moving Servers

To install Agility using an existing database transferred from another system, please follow the steps outlined at the end of this document.

ii. Installing Local Help files

Help refers to online content by default. If your installation is in a location where users will not be able to access the online help, you can install a local copy of help instead. Contact Digital.ai support for the help content. Then unzip the help file and install it under the /help directory on your web server, e.g. /inetpub/Agility/help/26.3/.

Note: You will need to update your local copy of help each time you update to a new quarterly release.

Step 3. Installing Agility Analytics

A. Before You Begin

i. Upgrade Agility Core

If you are upgrading from a prior release of Agility, first upgrade the core application to the current Agility Ultimate Edition. See the Upgrading Agility section below for more details. Be sure to contact your account manager to get a current license file if you are upgrading to a new annual release (e.g. from 19.x to 20.x) and place it in the (Application Name)\bin directory.

ii. Preparation

After verifying that the Agility application is successfully upgraded to the Ultimate Edition, gather the following information, needed when installing the other components:

- Agility application database location (server and database name)
- SQLServer that will host the Agility Datamart database
- Datamart database name (the standard proposed is *[application-name]-datamart*)
- SQLServer that will host the Agility Analytics database (the datamart & analytics databases can be on the same or different servers)
- Analytics database name (the standard proposed is *[application-name]-analytics*)
- Server location for the Agility Datamart Loader application: this is the application that Extracts Transforms and Loads the datamart from the Agility application database. It can run on any server that has access to both databases.
- Windows Web Server for the Agility Analytics web application

B. Install In This Order

i. Agility DatamartLoader

If you already have the Agility.DatamartLoader v9.3, see the Upgrading DatamartLoader section below to upgrade rather than installing new.

Otherwise, run the DatamartLoader setup program to create your Datamart. Follow the instructions in the 'Load the Datamart' topic in V1Datamart.pdf (packaged with the setup executables).

Note that during this setup, you will need to specify:

- the Agility application database location (server and database name)
- the Datamart database server and name (you'll have the option to create the database if it doesn't already exist)
- that you are using Agility Analytics with the Datamart (make sure to check the checkbox)
- The Analytics database server name and database name (you'll have the option to create a new database if it doesn't already exist)

ii. Install Agility Analytics

Run the Analytics setup program on the web server that will host Agility Analytics. During this process, you will need to specify:

- the Agility Analytics application name
- the URL that client browsers will use to access the Analytics application (this will likely default to localhost, it needs to be edited to use the correct domain/hostname)
- the URL client browsers use to access the core Agility application, and an integration code (used to secure communication between applications)
- the Agility Datamart database server and database name
- the Agility Analytics server and database name

iii.Run the DatamartLoader

Run the Agility Datamart Loader ETL process (see the 'Load the Datamart' topic in V1Datamart.pdf for more details on running it, including guidance on scheduling incremental updates). Note that if this is a new datamart it may take a few minutes; if it's an existing data mart it will simply do an incremental load in under a minute.

iv. Agility System Configuration

Using the Agility Admin tab, have a System Admin enable Analytics on the Admin > Analytics page, specify the URL for Analytics and enter the integration code you used during Analytics setup. Click 'Test Connection' to validate that both the URL and activation code are correct, then click 'Save'.

Step 4. Verify Installation

A. Agility Core

To access the Agility Core system:

- Open a supported web browser and enter the appropriate URL for your web server and application - http://servername/application, i.e., http://devserver/Agility (or https://deveserver/Agility if SSL is enabled on your web server).
- Enter **admin/admin** for the username and password and follow the application setup procedures in the Administration section.
- Verify the license installation by viewing the About page in Agility and clicking on the License Details link.

B. Agility Analytics

To access Agility Analytics (after installing and running the DatamartLoader, installing Analytics and configuring Agility to enable Analytics):

- Log in to Agility Core (as in Step A)
- In the sidebar menu, locate and click on the Analytics icon below the Reporting icon
- The browser will open a new window/tab into Agility Analytics, on the Overview page

Help Location

Online help is served from our on-demand environment to best serve all customers with the most recent updates for each release. If you have an on-premise installation that does not have access to the online help files, please contact VersionOne support to obtain local files for your use.

Local help files must be installed on your web server under the Help directory. For example, if your installation is called 'VersionOne', your Scrum help files would be here:

\wwwroot\VersionOne\help\26.3Ultimate\Scrum

Other Resources

Need more help? See the VersionOne Community Site for additional information, including:

- Online Quick Start Checklists for steps to get up and running quickly.
- Access to free Product Webinars.
- Answers to many common questions in the support Knowledge Base.

System Requirements

The operating configuration for Digital.ai Agility depends primarily on the number of concurrent users and the volume of information being managed by the system. The specifications below outline the minimum system requirements recommended to successfully run the complete Digital.ai Agility system (web server, database server, operating system, and so on).

Server

Operating System	Windows Server 2012, 2016, 2019 (32 or 64 bit), 2022
Web/Application Server	Internet Information Server (IIS) 7, 7.5, 8.0, 8.5, 10.0 with ASP.Net installed
Framework	Supported - .NET 4.8.0, or later (Core Application) Supported - .NET 4.6.2, or later (Data Mart and Analytics)
Database	Microsoft SQLServer 2012, 2014, 2016, 2017, 2019 with Full Text Search component
Processor	Dual Core 2 GHz
Memory	16 GB RAM

** Warning: SQL Server Express is not a supported alternative to SQL Server.*

Web Client

Browser	Chrome (preferred) Microsoft Edge Mozilla Firefox Safari We support the current and 1 prior version of Google Chrome, Mozilla Firefox, and Apple Safari. We do not support Internet Explorer version 11 beginning Digital.ai Agility version 21.3.
Operating System	Recommended: Currently-supported versions of Microsoft Windows, Apple macOS, and Linux.
Processor	2 GHz
Memory	4 GB RAM

Digital.ai Agility assumes full-screen browser use on a minimum 1024x768 display with 16-bit and above color depth. Product Owner-specific data may require higher screen resolutions (i.e., 1280x1024) to view all table columns at once on certain pages. JavaScript should be enabled.

Digital.ai Agility allows user customization of some display pages to increase the flexibility of meeting specific needs. It is important to note that extreme customization settings may affect the response time of a particular page. Through customization, each user can balance their own data display needs with their response time requirements. Customizable items that can reduce the overall size of a page and speed its display include the number of editable columns, the number of columns displayed, the number of rows displayed and the number of selections per dropdown.

Connectivity

A high-speed Internet connection such as cable modem, DSL, or T1 line is recommended.

Ongoing Maintenance

Ongoing Maintenance and Backups

1. Microsoft SQL Server should be set to Update Statistics automatically (the default setting). This improves ongoing performance of the system as the database grows over time.
    - Also see the article on Database Configuration and Maintenance for more detailed recommendations to help optimize performance in on-premise systems.
2. To keep reporting data current, schedule the DatamartLoader to run on a recurring basis. More details/guidance is provided in the 'Load the Datamart' topic in V1Datamart.pdf (packaged with the setup executables).
3. Regular full database backups of the core application and Analytics databases should be performed. This activity can be scheduled using Microsoft SQL Server's Enterprise Manager. A full database backup is required to restore the system should a hardware failure occur. To restore a system from a backup, follow the directions under the Installing Agility Using an Existing Database section above. It is not necessary to back up the Datamart database, as it can be recreated using the Agility DatamartLoader.
4. Digital.ai also recommends that you back up any localization files you've created for quicker system recovery.

Upgrading Agility Core

If you need to upgrade the Agility application and database, please follow these steps:

- Run the VersionOne setup .EXE program.
- Select Upgrade to upgrade the application and database.
- Select the appropriate instance to upgrade.
- Select OK once the upgrade has completed.
- A new license file is required for each annual Release. If you have a new Customer License (.lic) file, remove the existing license file from the webserver (ApplicationName)\bin directory and copy in the new one.

Upgrading Data Mart

If you need to upgrade the Agility Data Mart, please follow these steps:

- Run the VersionOne DatamartLoader setup .EXE program on the server where the DatamartLoader is installed.
- Select Upgrade to upgrade the application and database, connectivity.
- Select the appropriate instance to upgrade (if >1 is installed).
- Step through the wizard, which will default to all previous settings.

- Select OK once the upgrade has completed.

Upgrading Analytics

If you need to upgrade Agility Analytics, please follow these steps:

- Run the VersionOne Analytics setup .EXE program on the server where the Analytics web application is installed.
- Select Upgrade to upgrade the application and database, connectivity.
- Select the appropriate instance to upgrade (if >1 is installed).
- Step through the wizard, which will default to all previous settings.
- Select OK once the upgrade has completed.

Uninstalling Agility Core

If you need to uninstall the Agility core application, please follow these steps:

- Run the VersionOne setup .EXE program.
- Select Uninstall to remove the application and associated database.
- Follow the instructions in the setup program.
- Select OK once the uninstall has completed.

Uninstalling Data Mart

If you need to uninstall the Agility Data Mart application, please follow these steps:

- Run the VersionOne.DatamartLoader setup .EXE program on the server where the DatamartLoader is installed.
- Select Uninstall to remove the application and associated database.
- Follow the instructions in the setup program.
- Select OK once the uninstall has completed.

Uninstalling Analytics

If you need to uninstall Agility Analytics, please follow these steps:

- Run the VersionOne.Analytics setup .EXE program on the server where the Analytic web application is installed.
- Select Uninstall to remove the application and associated database.
- Follow the instructions in the setup program.
- Select OK once the uninstall has completed.

Moving Servers

To install Agility using an existing database transferred from another system, please follow the steps below.

Initial Steps

- Restore the database on the new system from a complete database backup obtained from the previous system. Refer to SQL Server's Enterprise Manager Documentation for details.
- Restore the Agility Analytics Meta-Data database on the new database server from a complete database backup obtained from the previous system. Refer to SQL Server's Enterprise Manager Documentation for details.

Moving Agility Core

- Run the VersionOne setup .EXE program.
- Select Install a New Instance to create your new system.
- Name your new application.
- Follow the prompts to reach the database selection page
- Select Attach to Existing Database and select the database you restored.
- Select OK once the upgrade has completed.
- If you have a Customer License (.lic) file, copy it into the webserver (ApplicationName)\bin directory and remove the Trial license file.

Moving Data Mart

- Run the VersionOne Data Mart Setup .EXE program.
- Select Install a New Instance.
- Name your new application.
- Follow the prompts to reach the database selection page when prompted for the Data Mart database, create a new database when prompted for the Analytics Meta-Data Database chose “attach to an existing database” and select the database you restored.
- Select OK once the upgrade has completed.

Moving Analytics

- Run the VersionOne Analytics Setup .EXE program.
- Select Install a New Instance.
- Name your new application.
- Follow the prompts and select the existing databases when prompted Select OK once the upgrade has completed.

To Finish

- Run the Data Mart ETL program.
- If you configured SMTP in Agility core, you will need to reenter your SMTP server password.
- Update your Agility Core system to use the new Analytics URL.
- Verify the installation.

Note: Do not use SQL Server’s ‘Copy Database…’ or other DTS-based db replication tasks, as they may not accurately replicate all database structures. In order to ensure the integrity of the database, you **must use** a full **Backup** (‘Backup type: Full’) **and Restore**.