Quick Start Guide

The Clarity installation program allows you to set up the Clarity server and client application components on a computer. You use the installation program to configure computers in your environment for their intended purpose.
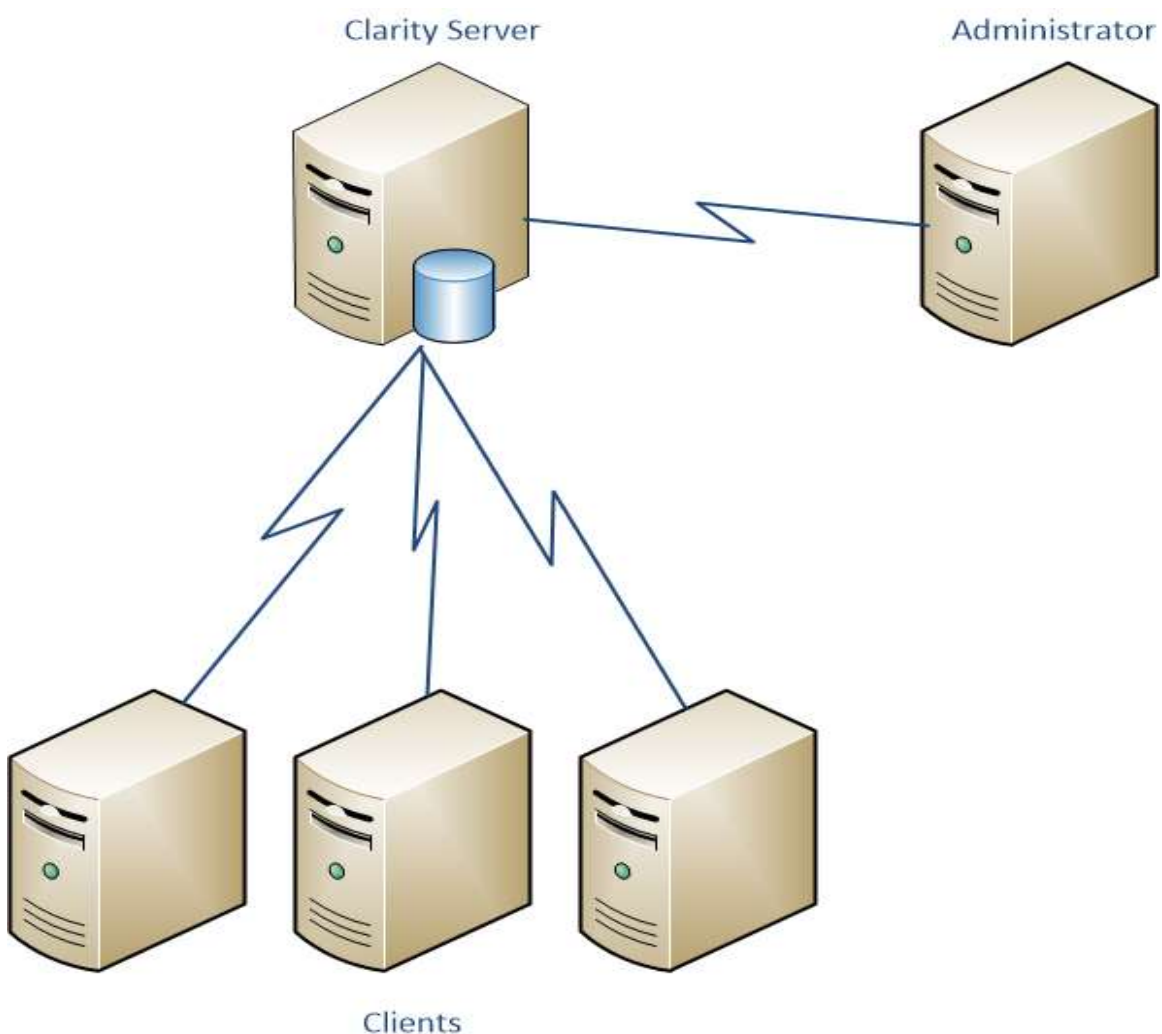
The Clarity Software Components

The Clarity system is comprised of three software components:

- a server component
- an administrator application
- an end user client application

The server is run as Windows® service and does not have any user interface. The administrator application provides the user interface to administer the server and configure the system. The client application provides the user interface for the end users to do work in Clarity.

The following diagram shows how the components are related.

Throughout this document we refer to the Clarity Server software component as a "server" meaning it performs a server-side function in the Clarity system. Do not confuse this as meaning a separately running server computer as this software component is simply a Windows® service and can be installed alongside the administrator and client applications. With the exception of the Clarity Server, you can have a mixture of any of the other components installed on a single computer. The Clarity Server can only be installed on one computer in the system.

The Software Component Responsibilities

Each of the software components has a specific responsibility.

Clarity Server Manages the license for the system as well as the database and its configuration. Both the Administrator and Client applications connect to this server to perform their activities.

Administrator Application Allows you to configure and manage the Clarity system.

Client Application The end user client application that allows you to do work in Clarity.

Summary of the Setup Process

There are three steps you will take to set up Clarity in your environment.

1. Install the Clarity server.

   The Clarity installation program will install the server, set up the database, and activate your Clarity license.

2. Run the Administrator application

   You will run the Administrator application to set up users in the system, as well as set up security, product definitions, and workflow definition as needed.

3. Install the Clarity Clients

   You will install the Clarity Client application on each computer you wish to use Clarity. In order to log into the Clarity Client, you must have a user account set up in the system.

Installing the Clarity Server

The Clarity installation is very straight forward. Once you have started the installation program, proceed with the step by step instructions below. In order to install the Clarity server you must be logged into Windows® as an administrator.
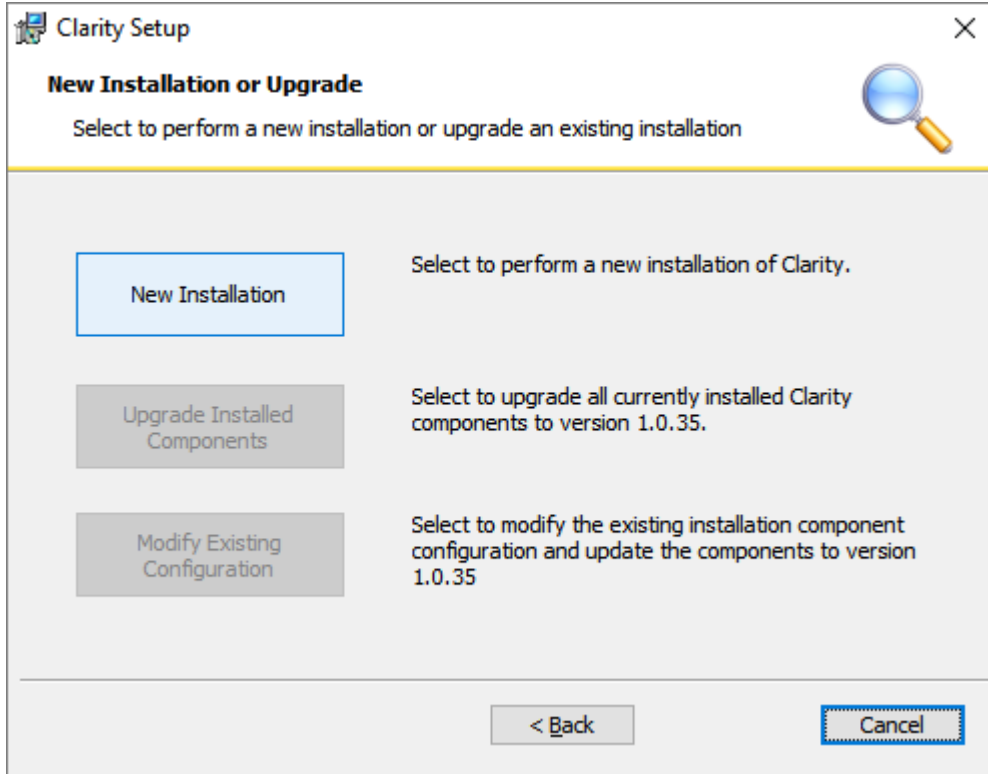
Please turn off any anti-virus software before performing the installation.
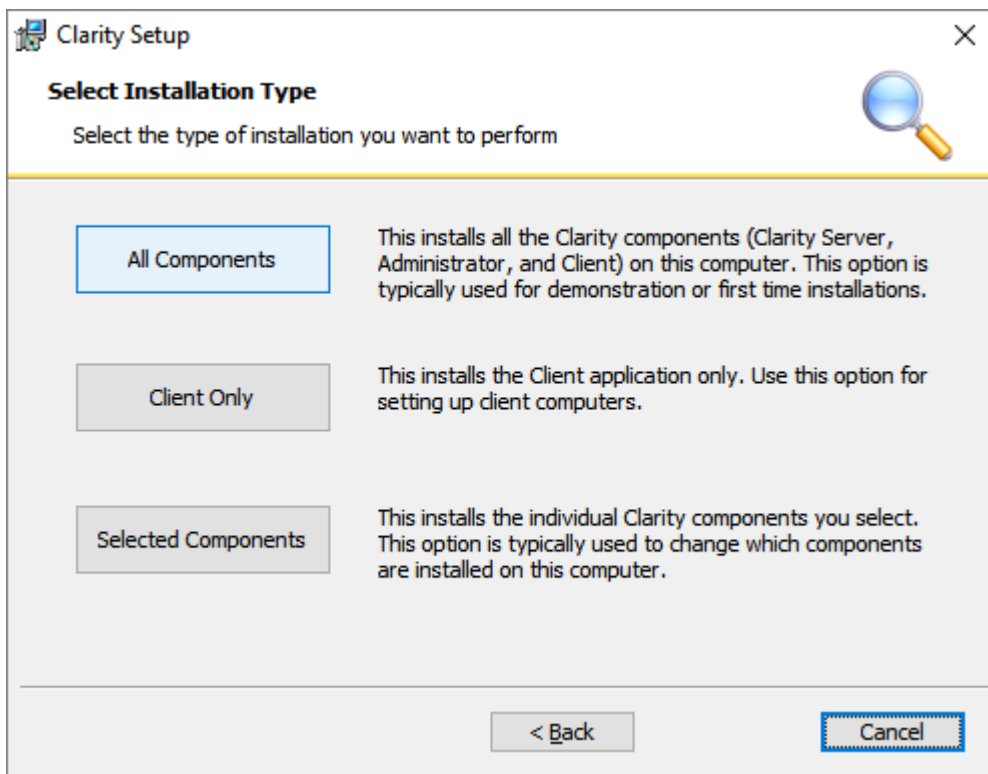
Note about User Account Control

If your Windows® computer has User Account Control (UAC) enabled you will not have sufficient rights to install the Clarity server components on your computer. You must turn off UAC to install Clarity and to perform Clarity administration tasks such as starting and stopping the server. If you have UAC enabled and turn it off for the purposes of installing Clarity, you will need to reboot the computer before the new UAC settings take effect.
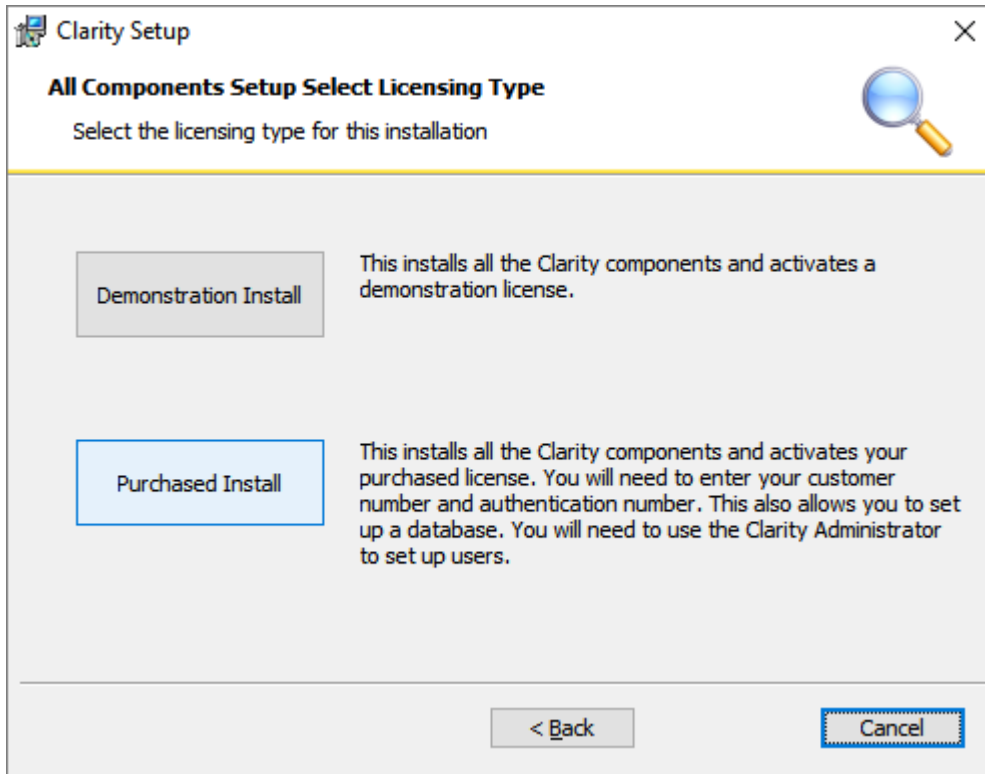
1. After accepting the End User License Agreement, select to perform a New Installation.

2. Select to install All Components. This will install all the software components on the local computer.
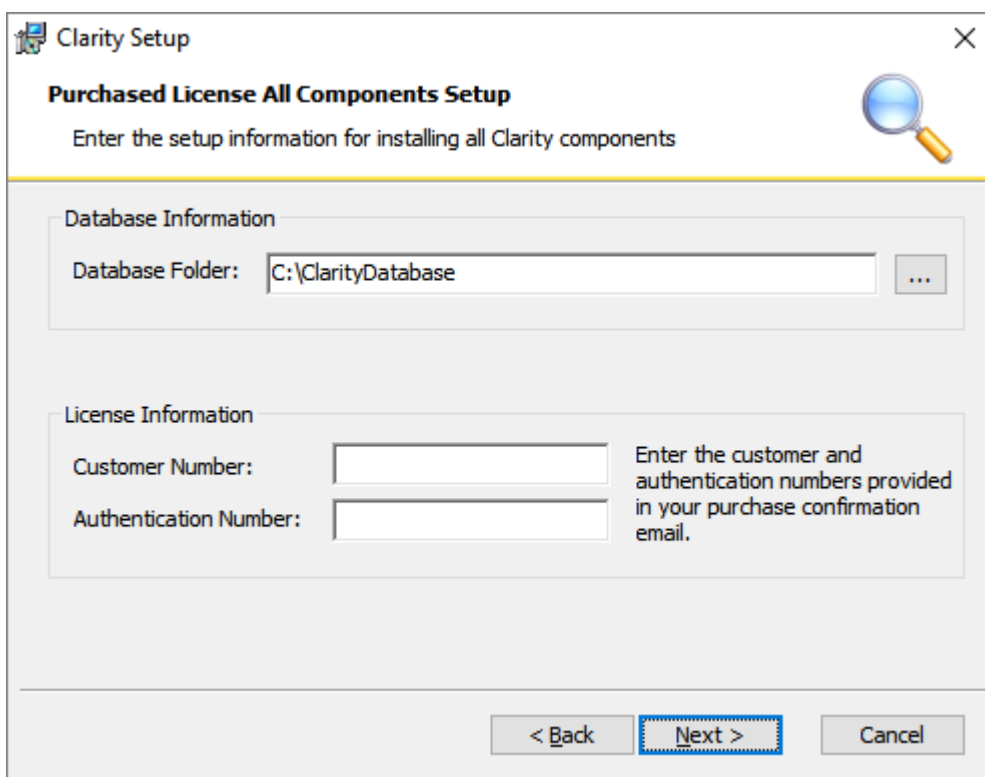
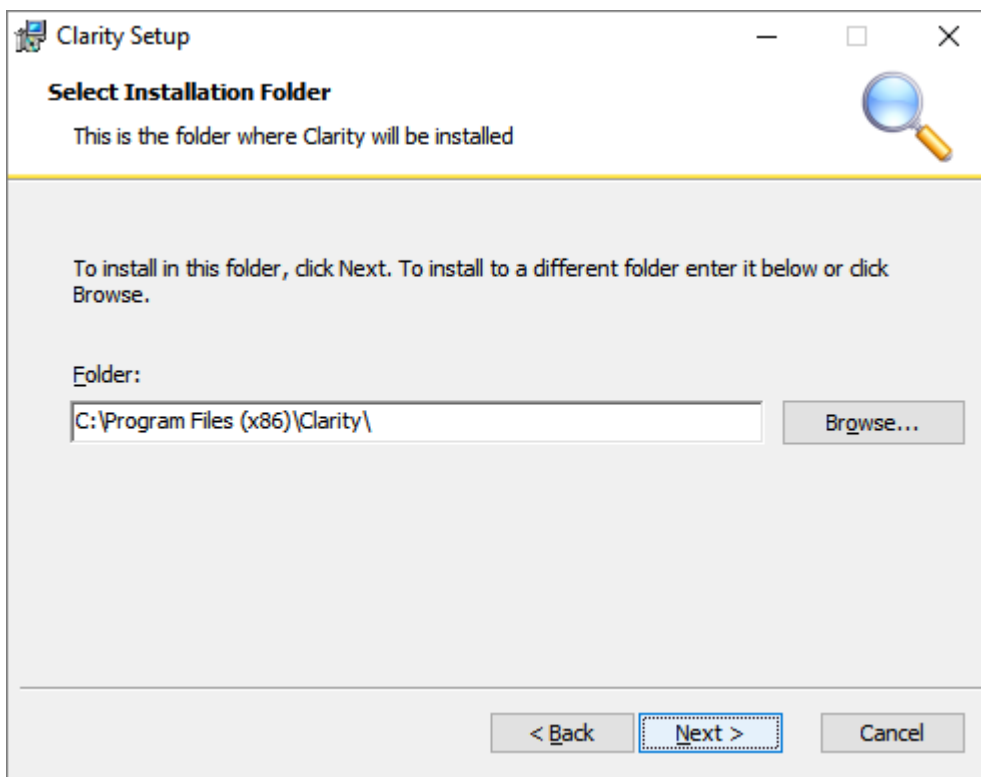3. Select to perform a Purchased Install.

4. Specify the database and license information. Enter the path you would like the database files to be placed into. **The folder you specify for the database must be empty. If it does not exist it will be created for you.**

   Specify the customer number and authentication number found in your receipt e-mail you received when you purchased your license of Clarity.

   Click on the Next button.

5. Specify the location you want to install Clarity into. This path is defaulted to the Program Files folder.

6. Click the Next button and then click Install.

The installation program will install Clarity, create the database in the path you specified, and will automatically start the server and activate a your license. Once this setup processing has completed you will be ready to log into the Client and Administrator applications and use Clarity.

Note about Shortcut Security

After you have completed the installation of Clarity, you may need to add your Windows® user in the Security tab in the properties for the Clarity Administrator shortcut on your desktop. If your user is not included in the Security tab for the shortcut, when you run the Clarity Administrator it will not have sufficient rights to start and stop the Clarity server components.

You can add your user to the security for the shortcut by right clicking on the shortcut and viewing the Properties dialog. Select the Security tab, and then click the Edit button and add your user to the security settings. After that, you must also go to the Compatibility tab on the shortcut properties and check the "Run this program as an administrator" checkbox in the Privilege Level settings.

Running the Administrator Application

The Administrator application is where you administer the server configuration, users, security, product definitions, and workflow definitions for the system. You can run the Administrator application from the desktop icon that was installed.
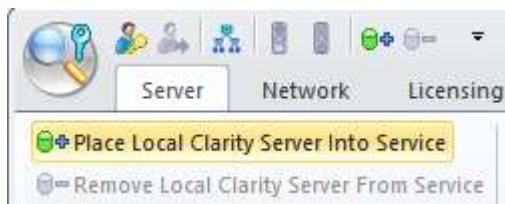
You will need to create user accounts for each of your users before they can log into the system using the Clarity Client.

Logging into the System

In order to administer the system the Administrator application must log into a running Clarity Server. The All Components installation installs all the software components on the same computer, so the Clarity Server must be running on the local computer.

When you start the Administrator application, the stoplight icon on the quick access toolbar will show a red light indicating that the server is currently running locally and can be stopped by pressing the red light button. If the green light is shown or neither is active, that indicates that the server is not running locally and you must start it in order to log in. If that is the case then start the local server by selecting the Place Local Clarity Server Into Service command under the Server ribbon menu. Alternatively, you can press the button on the quick access toolbar.

With the local server running you can log into the system by pressing the login button on the toolbar. You will be asked for the administrator user name and password. The default administrator user name is **admin**, and the default password is also **admin**.

You should rename the default administrator account to something other than "admin", and you should change the password also. Note that you can create as many administrator accounts as you wish using the Manage Administrators dialog. The administrator accounts do not occupy a user seat of the license.
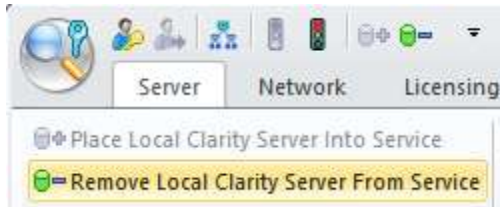
Creating the User Accounts

To create the user accounts to allow your users to log into the Clarity Client, use the User Accounts and Security panel.

Stopping the Servers

If you want to stop the server simply click the red stoplight button on the toolbar. If you want to stop the server and also unregister the service from the Microsoft Management

Console click the Remove Local Clarity Server From Service command off the Server ribbon menu. Alternatively, you can press the ⬛ button on the toolbar.

If you are currently logged into the running Clarity Server you will be warned that you will be logged off if you stop the server.

📓 Note that the green stoplight button 🚦 indicates that the locally installed server has been placed into service (i.e. the service has been registered with the Microsoft Management Console) but is not currently running. Pressing the button will start the server.

Refer to the in-product documentation for more information regarding the Administrator features.

📓 Refer to the Getting Started topic in the in-product documentation for the Clarity Administrator. This topic covers the setup process more in-depth and provides additional information about setting up the system for your particular needs.
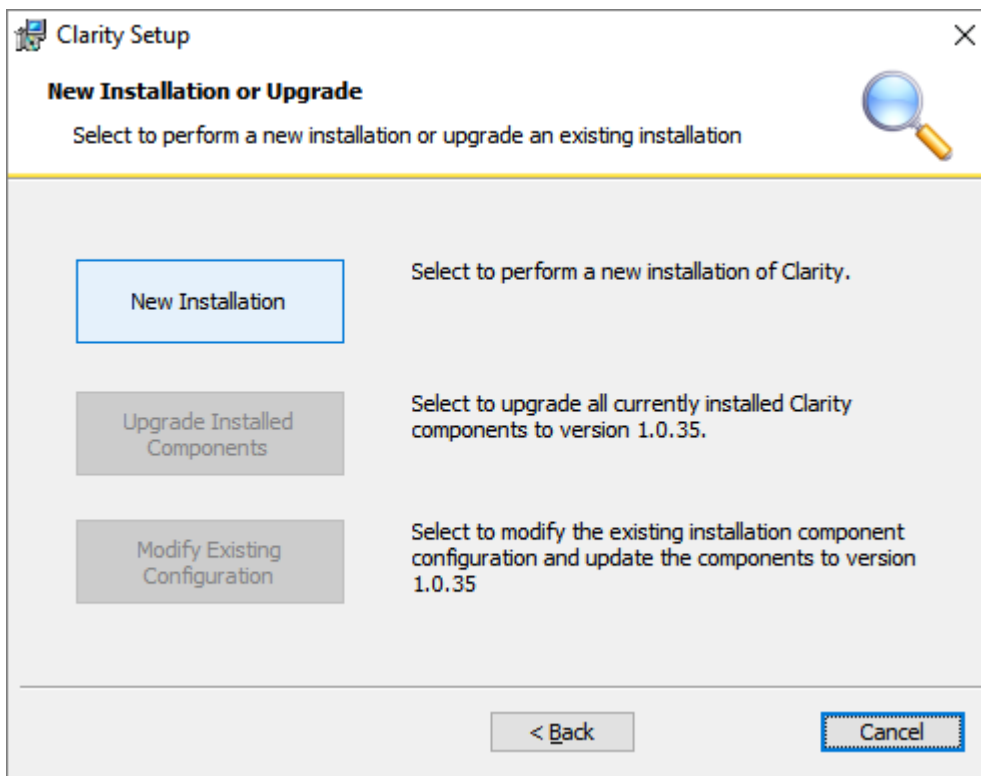
Installing the Client Applications

The Client application is where you do most of your work in Clarity. This is where you create and manage work items, collaborate with others, and report on the data.
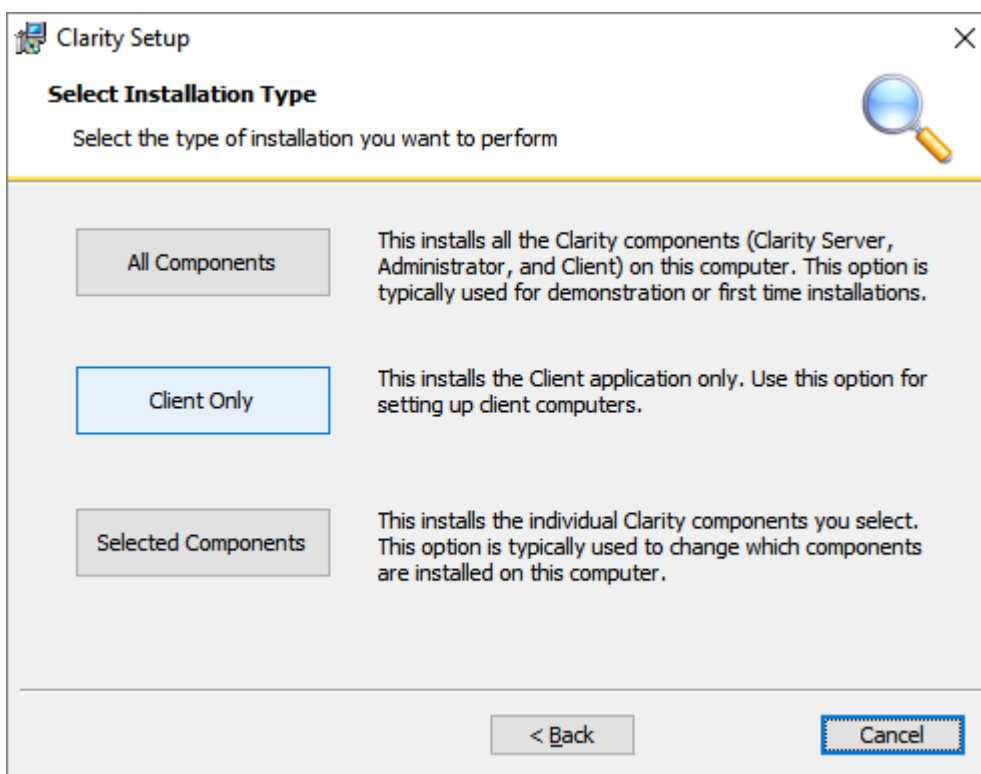
You will need to install the Clarity Client application on each computer that users will access the system from. You will do that using the Clarity installation program.

Run the Clarity installation program and follow these steps:
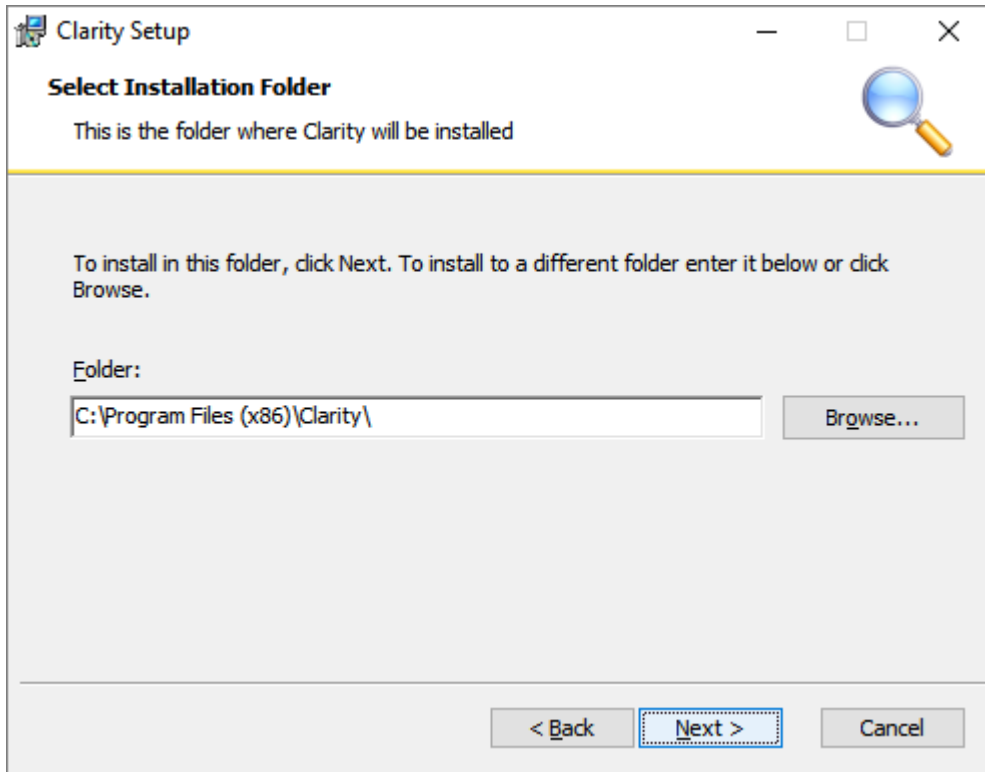
1. After accepting the End User License Agreement, select to perform a New Installation.

2. Select to install the Client only.

3. Specify the location you want to install the Clarity Client into. This path is defaulted to the Program Files folder.

4. Click the Next button and then click Install.

The installation program will install the Clarity Client application on the local computer. You will need to have a user account set up in order to log into the system.

Running the Client Application

You can run the Clarity Client application from the desktop icon that is installed. When you first run the Client application you will need to configure the network settings to point to the Clarity Server.

Configuring Network Settings

When you first run the Clarity Client you will be asked if you want to configure the network settings. Press **Yes** to configure the settings.

In the Setup Network dialog you will need to enter the host name (or static IP address) of the Clarity Server. If you have performed the standard server installation as outlined in this guide, this will be the computer that you performed that server installation on.

You will also be asked for the TCP port for the Clarity Server. If the administrator has not changed the port from the default, simply accept the default value.

Press the OK button to save the network settings.

Logging In to the Client

When you run the Client application you will be asked for your user name and password. Enter the user login name and password that has been set up for you by your systems administrator.

![note icon] Note that the user login name and the user display name are not the same thing. The login name is what is used as credentials to log into the system and it is not displayed anywhere in the system. The user display name is what is shown publicly for all database

activity associated with the user. The login and display names are separate so knowledge of a user's login credentials is not made public. Normally you should make the login and display names different for a given user.

Refer to the in-product documentation for more information regarding the Client features.

Refer to the Getting Started topic in the in-product documentation for the Clarity Client. This topic covers the process of getting your data into Clarity, and how to begin using the Clarity features.