

# **REST API for Ruby Configuration Guide** **and User Management Script User Instructions**

## **Introduction**

The Rally REST API tool is built on a Ruby interface to the Rally REST web service API. This set of scripts are *not officially supported* and are *used at your own risk*.

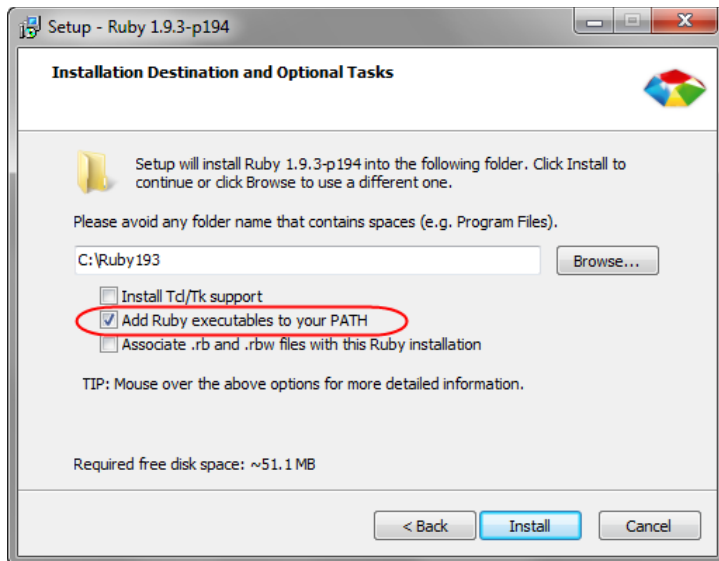
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### **I. Installing Ruby on Windows**

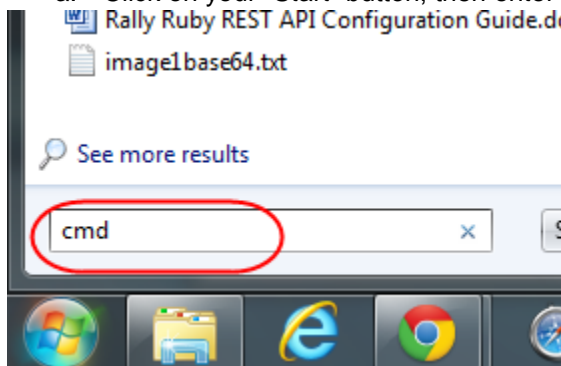
Install the Ruby 1.9.3 Runtime Environment: <http://rubyinstaller.org/downloads/>

1. During installation, please make sure to add the Ruby executable to your Path:

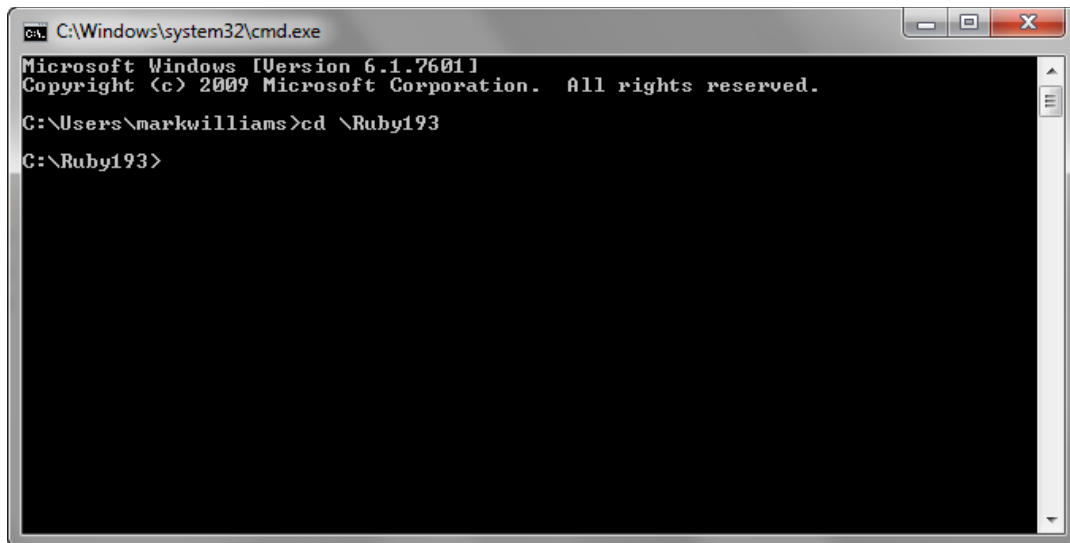


2. Open a command prompt window and go to the ruby directory that was created. In this example, Ruby was installed into C:\Ruby193:

- a. Click on your "Start" button, then enter cmd into the search dialog and hit Enter.



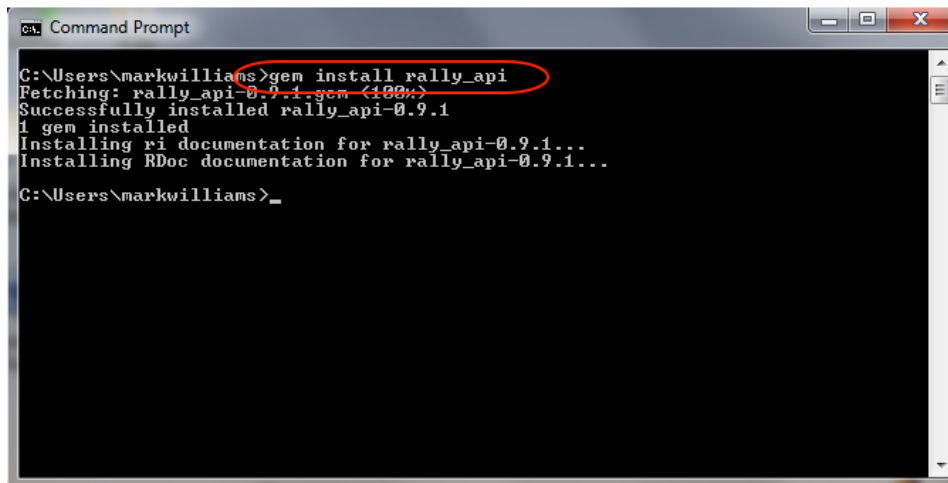
3. The Command prompt window appears. Navigate to where you installed Ruby:

A screenshot of a Windows Command Prompt window. The title bar shows the path "C:\Windows\system32\cmd.exe". The window contains the following text:

```
C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

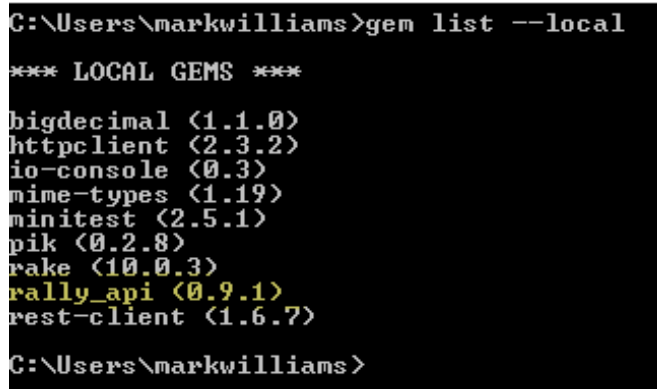
C:\Users\markwilliams>cd \Ruby193
C:\Ruby193>
```

4. Install the `rally_api` gem. This will also install its dependent gems. **Requires `rally_api` 0.9.1 or higher:** `gem install rally_api`.

A screenshot of a Windows Command Prompt window. The title bar says "Command Prompt". The command prompt shows the user typing `gem install rally_api`, which is circled in red. The output shows the gem being fetched, successfully installed, and documentation being installed. The prompt ends with `C:\Users\markwilliams>`.

```
C:\Users\markwilliams>gem install rally_api
Fetching: rally_api-0.9.1.gem (100%)
Successfully installed rally_api-0.9.1
1 gem installed
Installing ri documentation for rally_api-0.9.1...
Installing RDoc documentation for rally_api-0.9.1...
C:\Users\markwilliams>
```

5. When finished, you can verify all RubyGems installed by typing "`gem list -l`":

A screenshot of a Windows Command Prompt window showing the output of the command `gem list --local`. The output lists several installed gems and their versions, with `rally_api` highlighted in yellow. The prompt ends with `C:\Users\markwilliams>`.

```
C:\Users\markwilliams>gem list --local

*** LOCAL GEMS ***

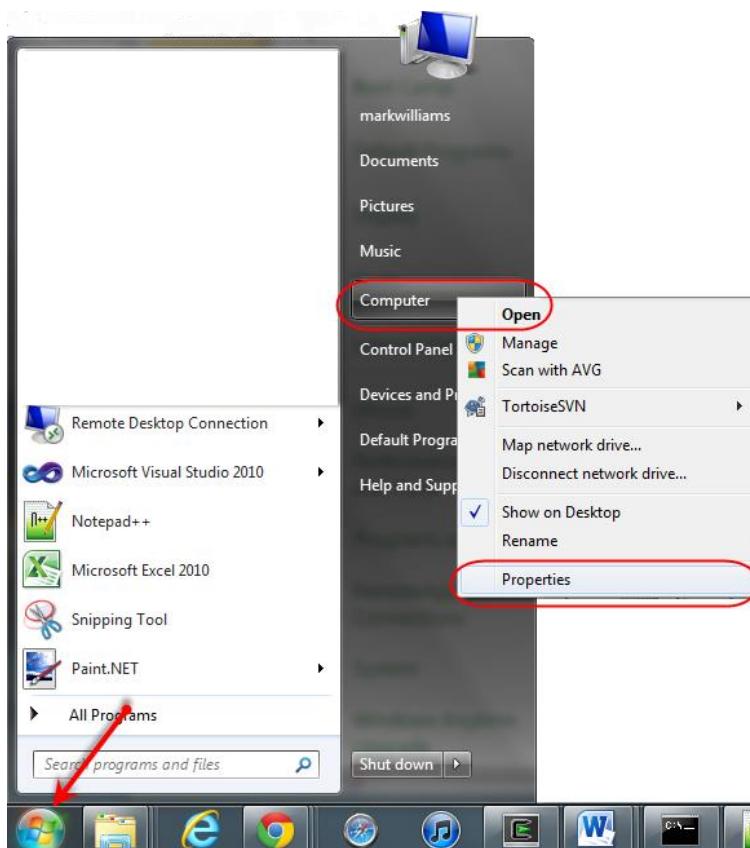
bigdecimal (1.1.0)
httpclient (2.3.2)
io-console (0.3)
mime-types (1.19)
minitest (2.5.1)
pik (0.2.8)
rake (10.0.3)
rally_api (0.9.1)
rest-client (1.6.7)

C:\Users\markwilliams>
```

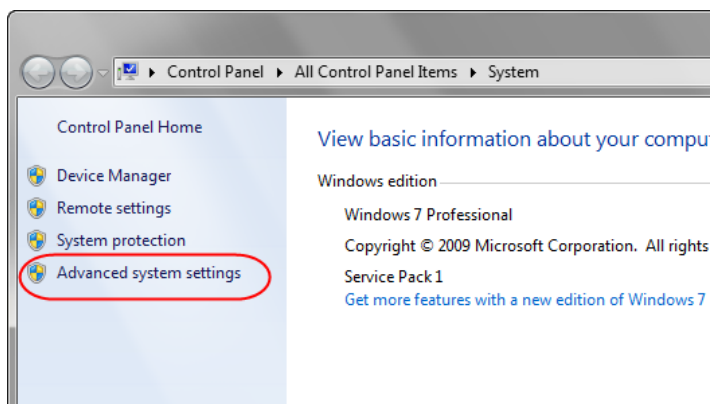
## II. Configuring a Proxy Server

1. If your company is behind a firewall or a proxy server, you may need to take additional steps in order to run Rally ruby scripting tools. To access the internet via a proxy-server using Windows, go to:

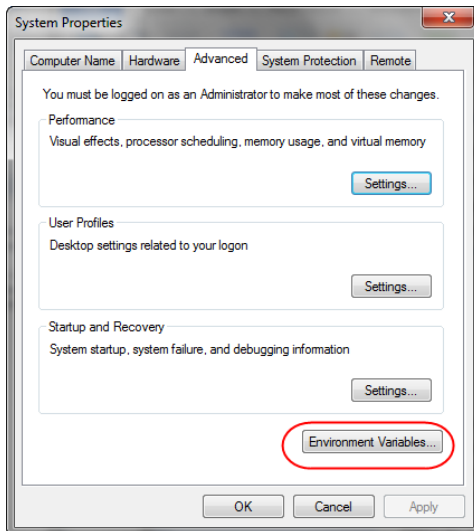
Start -> Computer (Right Click) -> Properties:



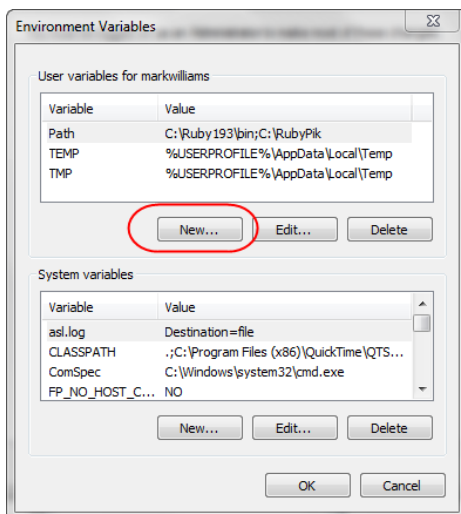
2. Advanced System Settings:



### 3. Environment Variables:



### 4. Use the New button to create a new environment variable:



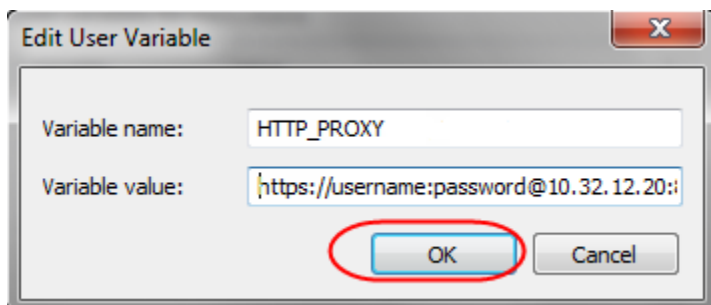
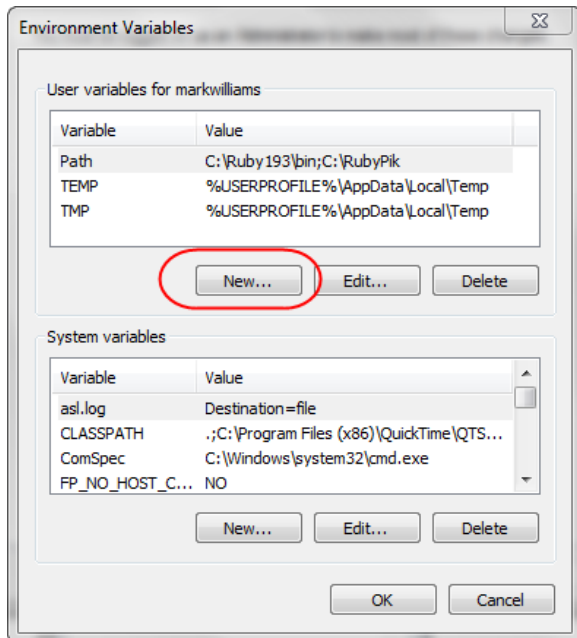
### 5. Create the following environment variables:

- HTTP\_PROXY
- HTTPS\_PROXY
- FTP\_PROXY

The value for each of the 3 variables is *usually* the same and of the general format:

[http://\[name:password@\]ipaddress:port/](http://[name:password@]ipaddress:port/)

6. Create HTTP\_PROXY as an example:



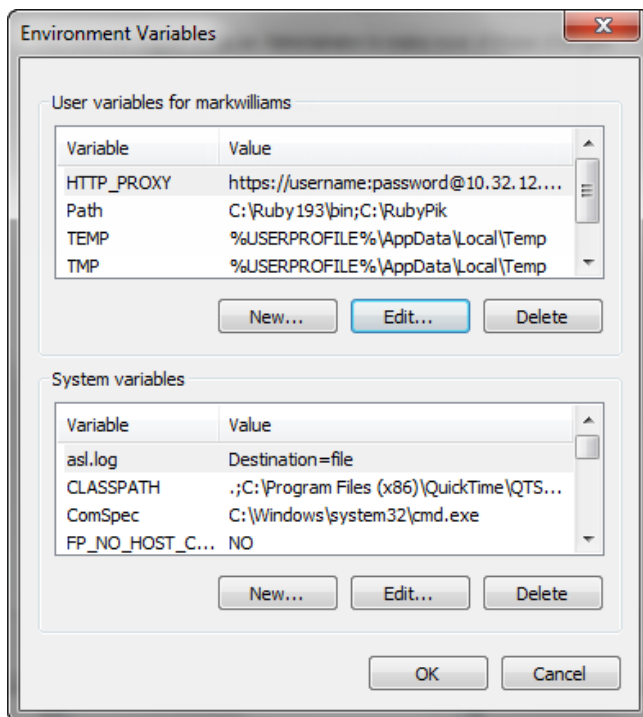
In this example you entered:

Variable name: HTTP\_PROXY

Variable value: <https://username:password@10.32.12.20:8080>

The actual values of username, password, and the proxy server address:port (10.32.12.20:8080) are going to vary according to your environment. You may need to check with your IT department concerning the appropriate information.

7. Completed Environment Variable Entry:



8. Note that you will have to open a **New Command Prompt window** after creating any environment variables in order for them to take effect in the Command prompt.



### III. User Management Tool: Create New Users and Assign Workspace and Project Permissions

1. Using your preferred Git client, clone the following GIT repo:

<https://github.com/RallyTools/Rally-User-Management>

2. Configure the login parameters for my\_vars.rb to match yours. Note that to properly manage user permissions, the Rally User ID of the individual running the scripts should be a Subscription Administrator within Rally:

```
$my_username      = 'user@company.com'
$my_password      = 'topsecret'
$my_base_url      = "https://rally1.rallydev.com/slm"

#API Version
$wsapi_version    = "1.40"
```

3. Scripts used:

- user\_permissions\_template\_generator.rb
- user\_permissions\_uploader.rb

4. Prepare a four-column, *tab-delimited* text file containing a list of New Users you wish to Create/Assign Permissions to. There is a template New User file called `new_user_list_template.txt` to get you started. The file should contain the following information:

- UserName: user1@company.com
- LastName: One
- FirstName: User
- DisplayName: User One

	A	B	C	D
1	UserID	LastName	FirstName	DisplayName
2	user1@company.com	One	User	User One
3	user2@company.com	Two	User	User Two
4	user3@company.com	Three	User	User Three

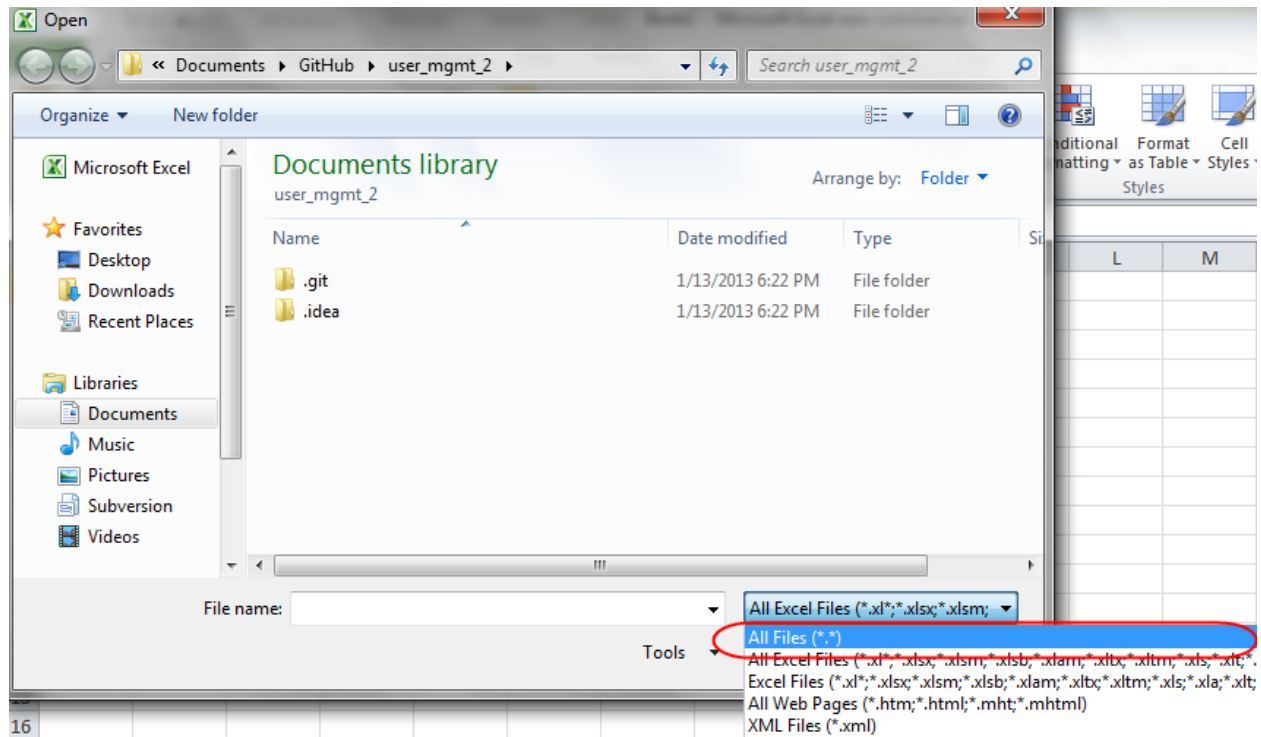
5. Find the `user_permissions_template_generator.rb` script. This script will use the list of New Users to prepare a *tab-delimited text template file of UserPermissions* that is editable in Excel. The output file is called `user_permissions_loader_template.txt` by default.

6. Run the script.

```
C:\> ruby user_permissions_template_generator.rb new_user_list_template.txt
Connecting to Rally: https://rally1.rallydev.com/slm as
sample.admin@rallydev.com...
Querying Workspace/Projects and caching results...
```

Permission upload template written to user\_permissions\_loader\_template.txt.

7. Open the user\_permissions\_loader\_template.txt in Excel. Since it is a *tab-delimited text file*, you'll need to start Excel first.
8. File -> Open and navigate to and open user\_permissions\_loader\_template.txt
9. Note that in order to show .txt files within the File -> Open dialog, you'll need to adjust the Filetype Filter from "Excel Files" to "All Files".



10. This will start an import Wizard. You can just click the "Finish" button to accept all defaults and open the file:

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.  
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.

☐ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1 File origin: 437 : OEM United States

Preview of file C:\Users\markwilliams\Documents\GitHub\us...\user\_permissions\_loader\_template.txt.

1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectNa
2	user1@company.com	OneUser	User	OneWorkspace	PermissionMark	W	Workspace
3	user1@company.com	OneUser	User	OneProject	PermissionMark	W	WorkspaceCo
4	user1@company.com	OneUser	User	OneProject	PermissionMark	W	WorkspaceAv
5	user1@company.com	OneUser	User	OneProject	PermissionMark	W	WorkspaceSa

Cancel < Back Next > Finish

11. Here's what the file should look like in Excel.

	A	B	C	D	E	F	G	H	I
1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	ObjectID
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	2890498610
3	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	2890498688
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	2890731604
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	2975788132
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Editor	2975793052
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Editor	2975793255
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	4625248927
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	4929903520
10	user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	9207058860
11	user1@company.com	One	User	User One	ProjectPermission	Mark W VS-TFS	TFSPProject	Editor	9207058950

As a Template, this worksheet is intended to provide a Workspace/Project permissions framework from which to build your own worksheet of Permissions to assign when creating new users.

12. The fields within the file are described as follows:

- **UserID:** This is the UserID / email address for the User you wish to create in Rally
- **LastName:** The new User's Last Name
- **FirstName:** The new User's First Name
- **DisplayName:** The new User's Display Name within Rally
- **Type:** This field has two possible values:
  - **WorkspacePermission:** Designates that this row assigns to the User a Workspace-level permission
  - **ProjectPermission:** Designates that this row assigns to the User a Project-level permission
- **Workspace:** The Workspace within which this WorkspacePermission or ProjectPermission resides. Note that for WorkspacePermissions this is redundant with the WorkspaceOrProjectName field, however, it is repeated down through both Workspace and ProjectPermissions in order to make Workspace-level filtering easy in Excel:

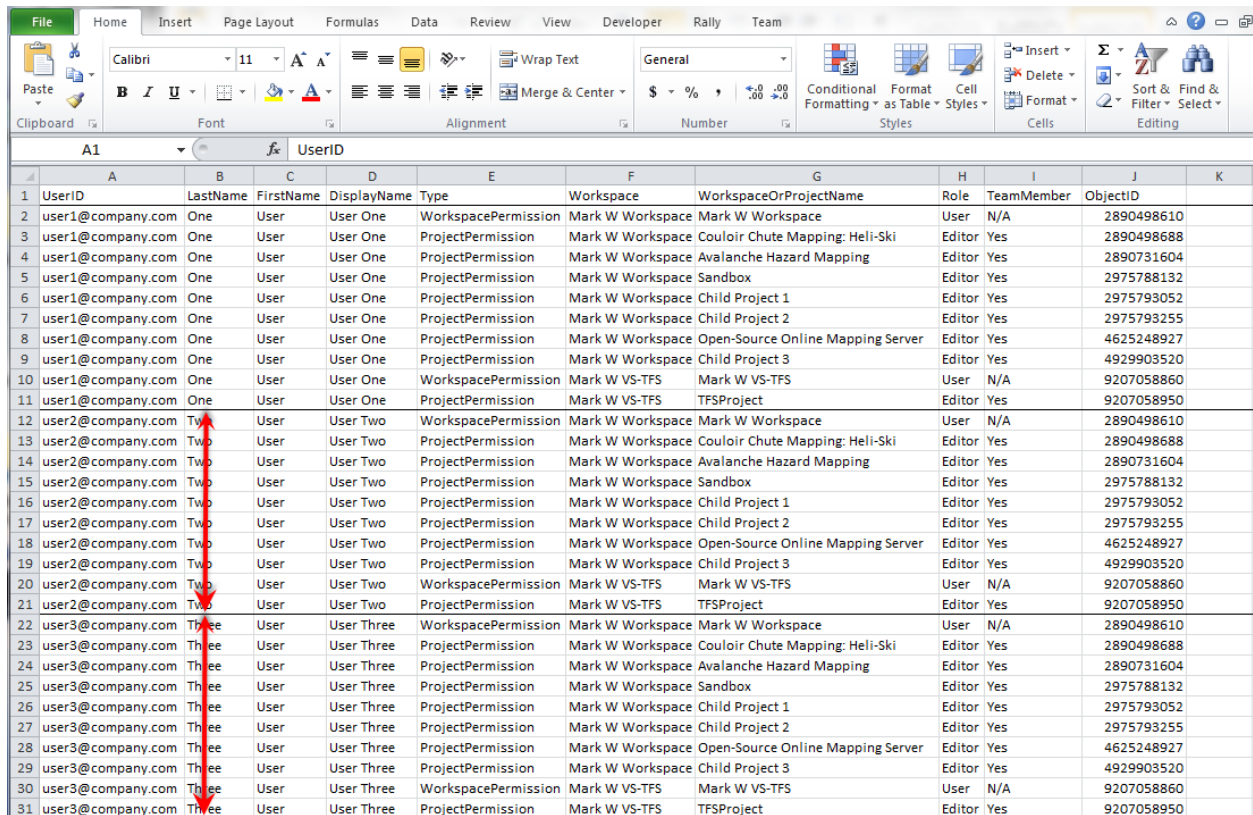
	A	B	C	D	E	F	G	H	I	J
1	UserID	LastNar	FirstNar	DisplayNar	Type	Workspace	WorkspaceOrProjectName	Ro	TeamMemb	ObjectID
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
3	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520

Rally Team										
<div> <div>File Home Insert Page Layout Formulas Data Review View Developer Rally Team</div> <div> <div>Clipboard</div> <div>Font</div> <div>Alignment</div> <div>Number</div> <div>Styles</div> <div>Cells</div> <div>Editing</div> </div> </div>										
<div> <div>A1</div> <div>UserID</div> </div>										
	A	B	C	D	E	F	G	H	I	J
1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
3	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
10	user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
11	user1@company.com	One	User	User One	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950

- **WorkspaceOrProjectName:** The Workspace or Project to which the **WorkspacePermission** or **ProjectPermission** will apply.
- **Role:** The Permission level being created for this **WorkspacePermission** or **ProjectPermission**
  - Valid **WorkspacePermission** Roles:
    - Admin
    - User
    - No Access
  - Valid **ProjectPermission** Roles:
    - Editor
    - Viewer
    - No Access
- **TeamMember:** Whether or not the User is a Team Member for this Project (applicable to Projects only)
- **ObjectID:** The ObjectID of the Workspace or Project within which the Permission grant is to occur. The ruby scripts do all lookups against ObjectID to avoid issues with duplicate Workspace or Project Names (allowed within Rally), as well as to avoid issues with special characters in these Names.

13. Now that the meanings of these fields are clear, you may start using the template to build your User Creation / Permissions assignment spreadsheet.

14. First, verify that there is a block of UserPermissions in the Template file for each New User you specified for creation in the `new_user_list_template.txt` file.



	A	B	C	D	E	F	G	H	I	J	K
	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID	
1	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610	
2	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688	
3	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604	
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132	
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052	
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255	
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927	
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520	
9	user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860	
10	user1@company.com	One	User	User One	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950	
11	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610	
12	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688	
13	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604	
14	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132	
15	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052	
16	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255	
17	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927	
18	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520	
19	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860	
20	user2@company.com	Two	User	User Two	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950	
21	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610	
22	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688	
23	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604	
24	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132	
25	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052	
26	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255	
27	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927	
28	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520	
29	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860	
30	user3@company.com	Three	User	User Three	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950	
31	user3@company.com	Three	User	User Three	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950	

In the example, you can see that the Permission template block has been replicated by the template generator to create blocks for a total of three users, and the Rally UserID's and Names have been updated to `user2@company.com`, `User Two`, and `user3@company.com`, `User Three`, respectively. The underlines have been added for visual clarity to clearly show where each user starts and ends.

15. Now adjust the Role column to match the permissions desired for each user within the Workspace/Project of interest:

UserID										
	A	B	C	D	E	F	G	H	I	J
1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
3	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
10	user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
11	user1@company.com	One	User	User One	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950
12	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
13	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
14	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
15	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
16	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
17	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
18	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
19	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
20	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
21	user2@company.com	Two	User	User Two	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950
22	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
23	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
24	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
25	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
26	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
27	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
28	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
29	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
30	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
31	user3@company.com	Three	User	User Three	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950

#### Important Usage Notes:

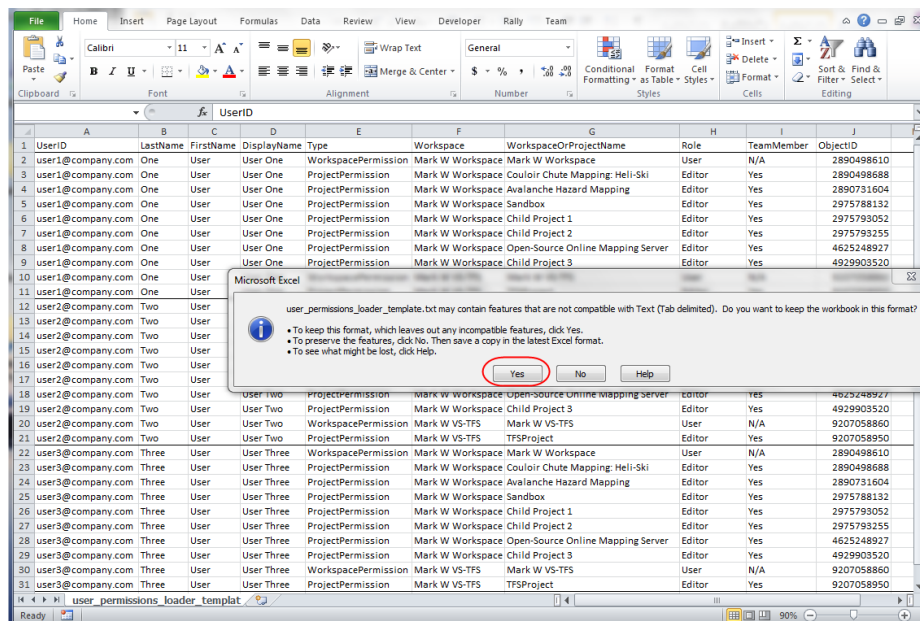
- **Spelling:** Make sure to use the *exact* spellings for the allowed Role definitions, repeated here:
  - Valid **WorkspacePermission** Roles:
    - Admin
    - User
    - No Access
  - Valid **ProjectPermission** Roles:
    - Editor
    - Viewer
    - No Access
- **Order Matters:** Leave the **WorkspacePermission** and **ProjectPermission** rows *in the same order* as they were found in the template. When creating new users, the script goes in order of the rows in the worksheet. **WorkspacePermissions** must exist and be created before **ProjectPermissions** within that Workspace can be created.



## 12. Adjust the Team Membership Column to match the desired Team Membership status for the Project(s) of interest

File Home Insert Page Layout Formulas Data Review View Developer Rally Team										
Clipboard Font Alignment Number Styles Cells Editing										
A1 UserID										
	A	B	C	D	E	F	G	H	I	J
1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
3	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
10	user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
11	user1@company.com	One	User	User One	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950
12	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
13	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
14	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
15	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
16	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
17	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
18	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
19	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
20	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
21	user2@company.com	Two	User	User Two	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950
22	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
23	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
24	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
25	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
26	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
27	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
28	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
29	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
30	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
31	user3@company.com	Three	User	User Three	ProjectPermission	Mark W VS-TFS	TFSProject	Editor	Yes	9207058950

## 13. Once you've completed making the Role and Team Membership assignments that you desire, save the worksheet. Excel will prompt you regarding preservation of formatting, etc. since you are saving a *Tab-Delimited Text* worksheet. Click "Yes" to Save as Tab-Delimited text:



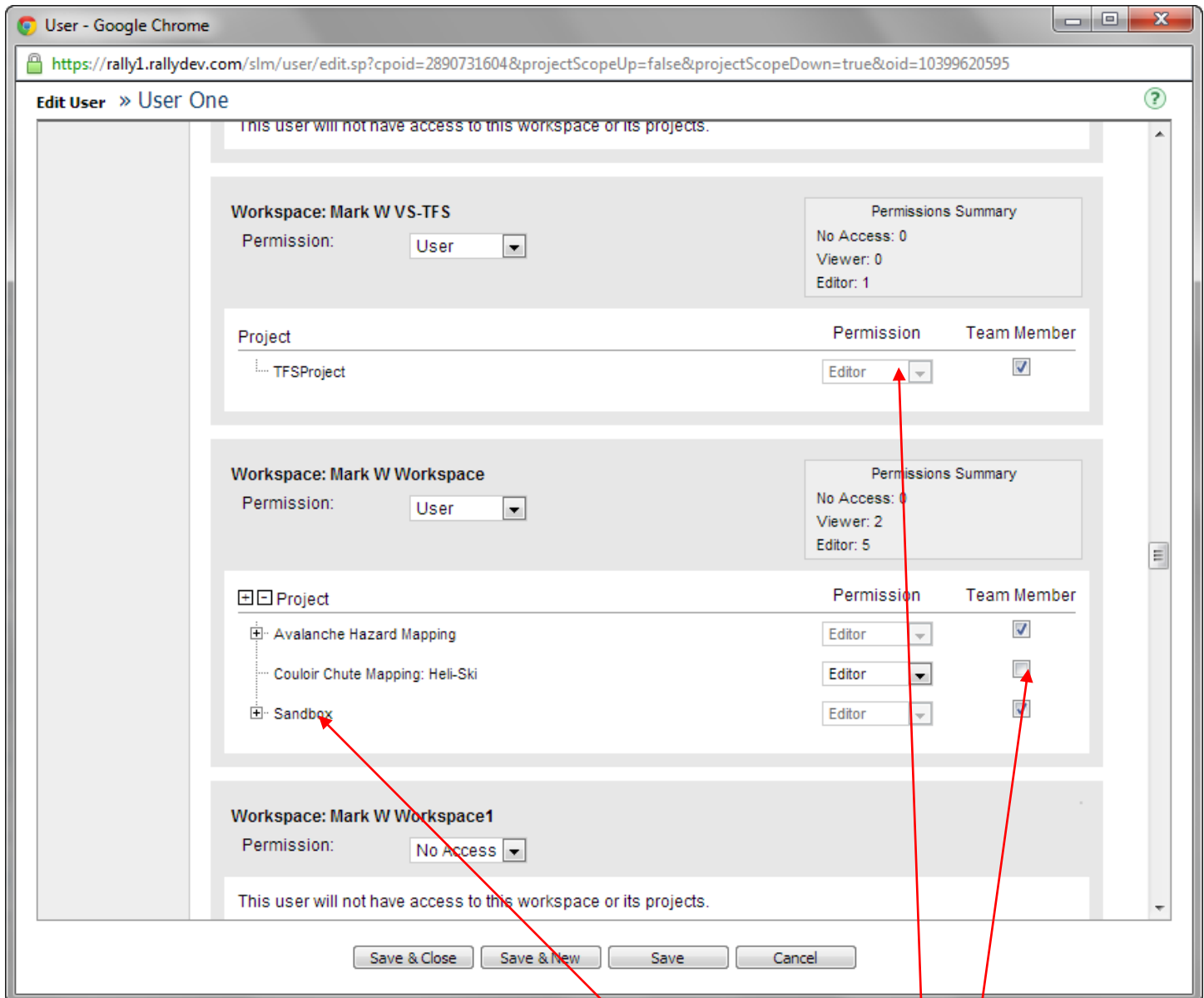


**Important:** Make sure to use Tab-Delimited text, not CSV, not XLSX or XLS. The loader script expects and processes only Tab-Delimited files.

#### 14. Now you're ready to run the uploader script to Create Users and Assign them your desired WorkspacePermissions and ProjectPermissions:

```
C:\> ruby user_permissions_loader.rb user_permissions_loader_template.txt
I, [2013-02-03T23:14:41.675636 #4784] INFO -- : Connecting to
https://rally1.rallydev.com/slm as sample.admin@rallydev.com...
I, [2013-02-03T23:14:41.676636 #4784] INFO -- : Instantiating User Helper...
I, [2013-02-03T23:14:41.676636 #4784] INFO -- : Caching workspaces and projects...
I, [2013-02-03T23:14:42.230668 #4784] INFO -- : This subscription has: 2 workspaces.
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Caching Workspace: Mark W Workspace.
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Workspace: Mark W Workspace has: 7 open
projects.
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Caching Project: Couloir Chute Mapping:
Heli-Ski
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Caching Project: Avalanche Hazard Mapping
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Caching Project: Sandbox
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Caching Project: Child Project 1
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Caching Project: Child Project 2
I, [2013-02-03T23:14:42.321673 #4784] INFO -- : Caching Project: Open-Source Online Mapping
Server
I, [2013-02-03T23:14:42.322673 #4784] INFO -- : Caching Project: Child Project 3
I, [2013-02-03T23:14:42.414678 #4784] INFO -- : Caching Workspace: Mark W VS-TFS.
I, [2013-02-03T23:14:42.414678 #4784] INFO -- : Workspace: Mark W VS-TFS has: 1 open
projects.
I, [2013-02-03T23:14:42.414678 #4784] INFO -- : Caching Project: TFSPProject
I, [2013-02-03T23:14:42.415678 #4784] INFO -- : Caching user list...
I, [2013-02-03T23:14:44.363790 #4784] INFO -- : Cached 25 of 269 users
I, [2013-02-03T23:14:44.364790 #4784] INFO -- : Cached 50 of 269 users
I, [2013-02-03T23:14:44.364790 #4784] INFO -- : Cached 75 of 269 users
I, [2013-02-03T23:14:44.364790 #4784] INFO -- : Cached 100 of 269 users
I, [2013-02-03T23:14:44.365790 #4784] INFO -- : Cached 125 of 269 users
I, [2013-02-03T23:14:44.365790 #4784] INFO -- : Cached 150 of 269 users
I, [2013-02-03T23:14:44.365790 #4784] INFO -- : Cached 175 of 269 users
I, [2013-02-03T23:14:44.366790 #4784] INFO -- : Cached 200 of 269 users
I, [2013-02-03T23:14:44.366790 #4784] INFO -- : Cached 225 of 269 users
I, [2013-02-03T23:14:44.366790 #4784] INFO -- : Cached 250 of 269 users
I, [2013-02-03T23:14:44.463796 #4784] INFO -- : User user1@company.com does not yet exist.
Creating...
I, [2013-02-03T23:14:44.928822 #4784] INFO -- : Created Rally user user1@company.com
I, [2013-02-03T23:14:45.016827 #4784] INFO -- : user1@company.com Mark W Workspace -
Permission set to User
I, [2013-02-03T23:14:45.222839 #4784] INFO -- : user1@company.com Couloir Chute Mapping:
Heli-Ski - Permission set to Editor
I, [2013-02-03T23:14:45.476853 #4784] INFO -- : user1@company.com Couloir Chute Mapping:
Heli-Ski - No changes to Team Membership
I, [2013-02-03T23:14:45.477854 #4784] INFO -- : user1@company.com Avalanche Hazard Mapping
- Permission set to Editor
I, [2013-02-03T23:14:45.885877 #4784] INFO -- : user1@company.com Avalanche Hazard Mapping
- Team Membership set to Yes
I, [2013-02-03T23:14:45.886877 #4784] INFO -- : user1@company.com Sandbox - Permission set
to Editor
I, [2013-02-03T23:14:46.317902 #4784] INFO -- : user1@company.com Sandbox - Team
Membership set to Yes
```

15. Check the Users in Rally and verify the appropriate Permissions and Team Memberships:



**Edit User » User One**

This user will not have access to this workspace or its projects.

**Workspace: Mark W VS-TFS**  
Permission: User

**Permissions Summary**  
No Access: 0  
Viewer: 0  
Editor: 1

Project	Permission	Team Member
TFSPProject	Editor	<input checked="" type="checkbox"/>

**Workspace: Mark W Workspace**  
Permission: User

**Permissions Summary**  
No Access: 0  
Viewer: 2  
Editor: 5

Project	Permission	Team Member
Avalanche Hazard Mapping	Editor	<input checked="" type="checkbox"/>
Couloir Chute Mapping: Heli-Ski	Editor	<input type="checkbox"/>
Sandbox	Editor	<input checked="" type="checkbox"/>

**Workspace: Mark W Workspace1**  
Permission: No Access

This user will not have access to this workspace or its projects.

Save & Close Save & New Save Cancel

UserID	LastNan	FirstNan	DisplayNan	Type	Workspace	WorkspaceOrProjectName	Role	TeamMemb	ObjectID
user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	No	2890498688
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Viewer	No	2975793052
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Viewer	No	2975793255
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
user1@company.com	One	User	User One	ProjectPermission	Mark W VS-TFS	TFSPProject	Editor	Yes	9207058950

12. You can see that the Permissions assigned in your bulk upload match the ones in the tool! This can save a lot of clicking when creating new users.



#### IV. User Management Tool: Summarizing User Permissions and Extended Attributes

1. Scripts used:

- user\_permissions\_summary.rb

2. Find the user\_permissions\_summary.rb script. This script will prepare a *tab-delimited text file* that is editable in Excel. The output file is called user\_permissions\_summary.txt by default.

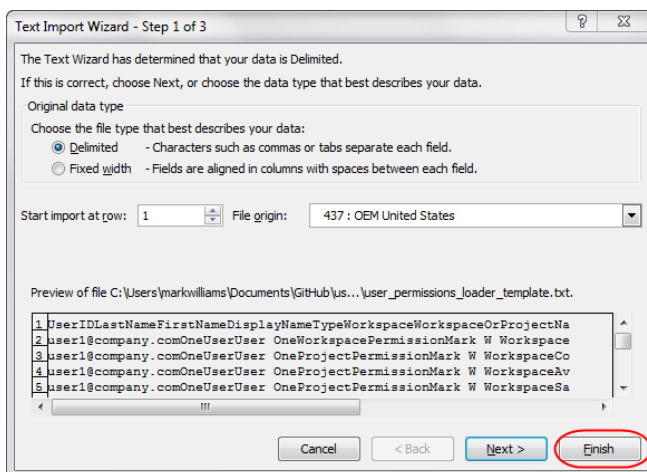
3. Run the script:

```
C:\> ruby user_permissions_summary.rb
Connecting to Rally: https://rally1.rallydev.com/slm as sample.admin@rallydev.com...
Querying users...
Found 266 users.
Summarizing users and writing permission summary output file...
Processed 25 of 266 users
Processed 50 of 266 users
Processed 75 of 266 users
Processed 100 of 266 users
Processed 125 of 266 users
Processed 150 of 266 users
Processed 175 of 266 users
Processed 200 of 266 users
Processed 225 of 266 users
Processed 250 of 266 users
Done! Permission summary written to user_permissions_summary.txt.
```

4. Open the file in Excel. Since it is a *tab-delimited text file*, you'll need to start Excel first.

5. File -> Open and navigate to and open user\_permissions\_summary.txt

6. This will start an import Wizard. You can just click the "Finish" button to accept all defaults and open the file:



7. Here's what the file should look like in Excel.

UserID										
	A	B	C	D	E	F	G	H	I	J
1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
3	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Viewer	No	2975793255
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Viewer	No	2975793052
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	No	2890498688
10	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
11	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
12	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
13	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
14	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
15	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
16	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
17	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
18	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
19	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
20	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
21	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
22	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
23	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
24	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
25	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
26	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
27	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
28	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132

The file contains a summary of all User Permissions assigned to **ENABLED** Users within the Workspaces of interest. For performance reasons, in standard mode, the script excludes querying for or summarizing Users that have been Disabled.

**Note:** If a User has No Access within a particular Workspace or Project, there is *No Permission Summary Row* shown within the summary output file. This is because the summary script enumerates UserPermission attributes on the User object within Rally, and if a User does not have access to a particular Workspace or Project, no {Workspace,Project}Permission attribute is present in the collection of UserPermissions for a User.

If you see "N/A" entries within this file, the User of concern is a Subscription or Workspace Administrator, for whom the collection of UserPermissions is empty by default in Rally.

## 8. Summarizing Extended User Attributes

Extended Attributes include:

- Enabled/Disabled
- NetworkID
- Role
- CostCenter
- Department
- OfficeLocation

To enable output of these fields in the summary file, include the following variable in your my\_vars.rb environment file:

```
$summary_mode = :extended
```

Thus your my\_vars.rb file might look like this:

```
$my_username          = 'user@company.com'
$my_password          = 'topsecret'
$my_base_url          = "https://rally1.rallydev.com/slm"

#API Version
$wsapi_version        = "1.41"

# The $enable_user_cache parameter applies only when using the
user_permissions_loader.rb script
# Note: When creating or updating many users, pre-fetching UserPermissions
# can improve performance
# However, when creating/updating only one or two users, the up-front cost of
caching is probably more expensive
# than the time saved, so setting this flag to false probably makes sense when
creating/updating small
# numbers of users

$enable_user_cache    = false

# Mode options:
# :standard => Outputs permission attributes only
# :extended => Outputs enhanced field list including
Enabled/Disabled, NetworkID, Role, CostCenter, Department, OfficeLocation

$summary_mode = :extended
```

Running in :extended mode, your output summary would include these additional fields:

- Enabled/Disabled
- NetworkID
- Role
- CostCenter
- Department
- OfficeLocation

## V. User Management Tool: Updating User Permissions

### 9. Scripts used:

- user\_permissions\_summary.rb
- user\_permissions\_uploader.rb

10. Find the user\_permissions\_summary.rb script. This script will prepare a *tab-delimited text file* that is editable in Excel. The output file is called user\_permissions\_summary.txt by default.

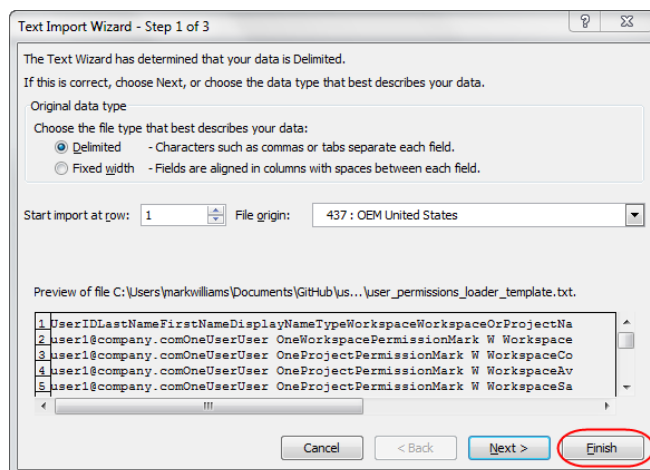
### 11. Run the script:

```
C:\> ruby user_permissions_summary.rb
Connecting to Rally: https://rally1.rallydev.com/slm as sample.admin@rallydev.com...
Querying users...
Found 266 users.
Summarizing users and writing permission summary output file...
Processed 25 of 266 users
Processed 50 of 266 users
Processed 75 of 266 users
Processed 100 of 266 users
Processed 125 of 266 users
Processed 150 of 266 users
Processed 175 of 266 users
Processed 200 of 266 users
Processed 225 of 266 users
Processed 250 of 266 users
Done! Permission summary written to user_permissions_summary.txt.
```

12. Open the file in Excel. Since it is a *tab-delimited text file*, you'll need to start Excel first.

13. File -> Open and navigate to and open user\_permissions\_summary.txt

14. This will start an import Wizard. You can just click the "Finish" button to accept all defaults and open the file:



15. Here's what the file should look like in Excel.

UserID										
	A	B	C	D	E	F	G	H	I	J
1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
3	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Viewer	No	2975793255
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Viewer	No	2975793052
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	No	2890498688
10	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
11	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
12	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
13	user2@company.com	Two	User	User Two	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
14	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
15	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
16	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
17	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
18	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
19	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes	2890498688
20	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
21	user2@company.com	Two	User	User Two	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604
22	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
23	user3@company.com	Three	User	User Three	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
24	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
25	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
26	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes	2975793255
27	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes	2975793052
28	user3@company.com	Three	User	User Three	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132

The file contains a summary of all User Permissions assigned to users within the Workspaces of interest.

**Note:** If a User has No Access within a particular Workspace or Project, there is *No Permission Summary Row* shown within the summary output file. This is because the summary script enumerates UserPermission attributes on the User object within Rally, and if a User does not have access to a particular Workspace or Project, no {Workspace,Project}Permission attribute is present in the collection of UserPermissions for a User.

If you see "N/A" entries within this file, the User of concern is a Subscription or Workspace Administrator, for whom the collection of UserPermissions is empty by default in Rally.

16. To update permissions for User 1, you may wish to filter for just that user in Excel, and copy the permissions for that user to a blank Worksheet.

UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID
user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Viewer	No	2975793255
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Viewer	No	2975793052
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	No	2890498688
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes	4625248927
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604



17. Now, adjust the Role and/or Team Member columns as appropriate to change the desired permissions:

UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember	ObjectID
user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	TFSProject	Editor	Yes	9207058950
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	No Access	No	2975793255
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	No Access	No	2975793052
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	No	2890498688
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	No	4625248927
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604

18. There's no need to change or delete rows for which Permissions are not changing. When uploading updated Permissions, the user management scripts automatically check to see if a permission is changed in the file relative to Rally. If no change has been made, the scripts skip the entry and do not make any update to that particular Permission structure in Rally.

19. Once you've completed updating the Role assignments that you desire, save the worksheet. Excel will prompt you regarding preservation of formatting, etc. since you are saving a *Tab-Delimited Text* worksheet. Click "Yes" to Save as Tab-Delimited text.

20. Now you're ready to run the uploader script to Update UserPermissions with your desired WorkspacePermissions and ProjectPermissions:

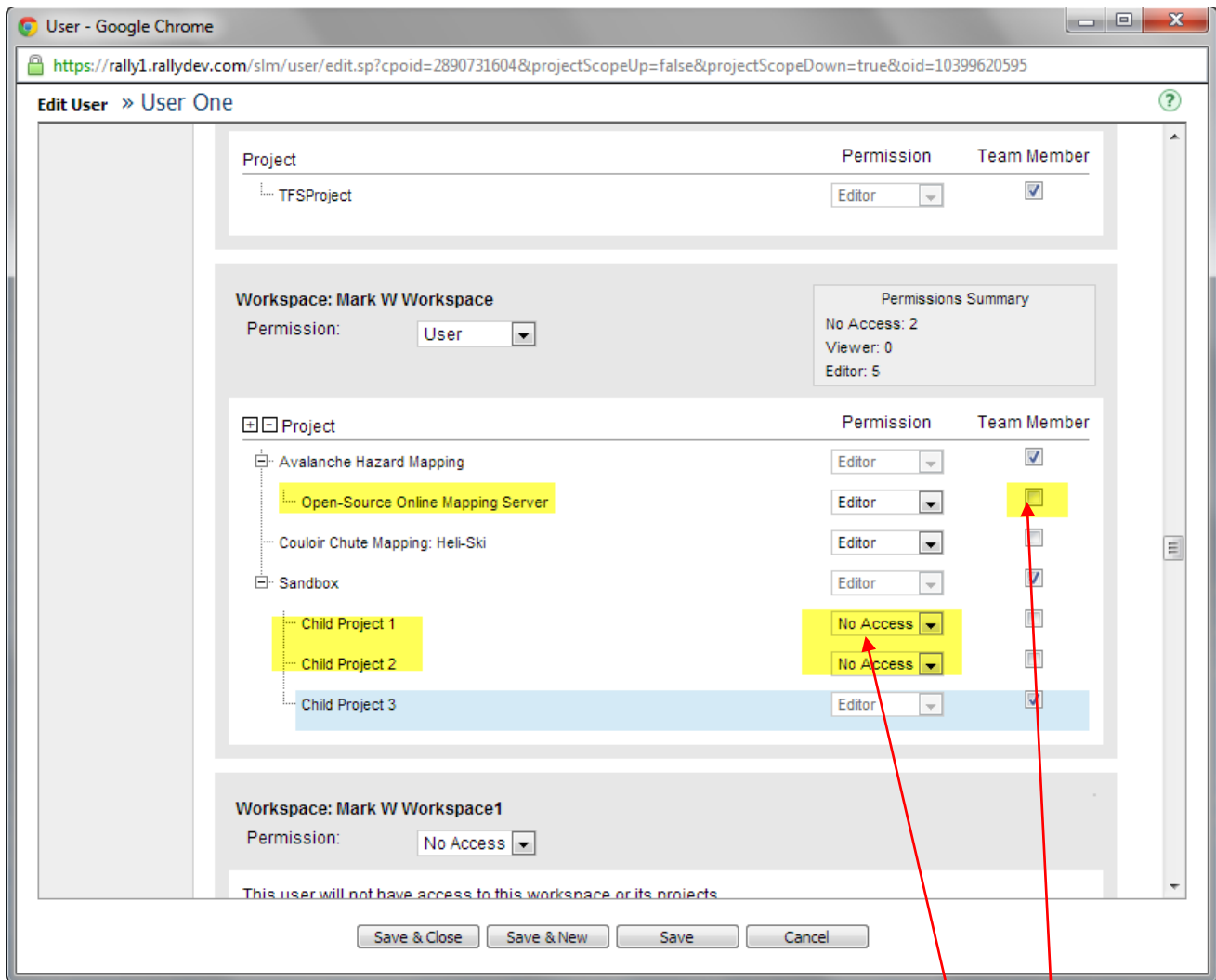
```
C:\> ruby user_permissions_loader.rb user_permissions_summary.txt
I, [2013-02-03T23:27:30.171591 #7092] INFO -- : Connecting to
https://rally1.rallydev.com/slm as sample.admin@rallydev.com...
I, [2013-02-03T23:27:30.172592 #7092] INFO -- : Instantiating User Helper...
I, [2013-02-03T23:27:30.172592 #7092] INFO -- : Caching workspaces and
projects...
I, [2013-02-03T23:27:30.817628 #7092] INFO -- : This subscription has: 2
workspaces.
I, [2013-02-03T23:27:30.905633 #7092] INFO -- : Caching Workspace: Mark W
Workspace.
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Workspace: Mark W Workspace
has: 7 open projects.
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Caching Project: Couloir Chute
Mapping: Heli-Ski
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Caching Project: Avalanche
Hazard Mapping
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Caching Project: Sandbox
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Caching Project: Child Project
1
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Caching Project: Child Project
2
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Caching Project: Open-Source
Online Mapping Server
I, [2013-02-03T23:27:30.906634 #7092] INFO -- : Caching Project: Child Project
3
I, [2013-02-03T23:27:30.997639 #7092] INFO -- : Caching Workspace: Mark W VS-
TFS.
```

```

I, [2013-02-03T23:27:30.997639 #7092] INFO -- : Workspace: Mark W VS-TFS has: 1
open projects.
I, [2013-02-03T23:27:30.997639 #7092] INFO -- : Caching Project: TFSPProject
I, [2013-02-03T23:27:30.998639 #7092] INFO -- : Caching user list...
I, [2013-02-03T23:27:33.096759 #7092] INFO -- : Cached 25 of 272 users
I, [2013-02-03T23:27:33.096759 #7092] INFO -- : Cached 50 of 272 users
I, [2013-02-03T23:27:33.096759 #7092] INFO -- : Cached 75 of 272 users
I, [2013-02-03T23:27:33.097759 #7092] INFO -- : Cached 100 of 272 users
I, [2013-02-03T23:27:33.097759 #7092] INFO -- : Cached 125 of 272 users
I, [2013-02-03T23:27:33.097759 #7092] INFO -- : Cached 150 of 272 users
I, [2013-02-03T23:27:33.098759 #7092] INFO -- : Cached 175 of 272 users
I, [2013-02-03T23:27:33.098759 #7092] INFO -- : Cached 200 of 272 users
I, [2013-02-03T23:27:33.098759 #7092] INFO -- : Cached 225 of 272 users
I, [2013-02-03T23:27:33.099759 #7092] INFO -- : Cached 250 of 272 users
I, [2013-02-03T23:27:33.103759 #7092] INFO -- : user1@company.com Mark W VS-
TFS - No permission updates
I, [2013-02-03T23:27:33.103759 #7092] INFO -- : user1@company.com Mark W
Workspace - No permission updates
I, [2013-02-03T23:27:33.103759 #7092] INFO -- : user1@company.com TFSPProject
- No permission updates
I, [2013-02-03T23:27:33.103759 #7092] INFO -- : user1@company.com TFSPProject
- No changes to Team Membership
I, [2013-02-03T23:27:33.103759 #7092] INFO -- : user1@company.com Child
Project 3 - No permission updates
I, [2013-02-03T23:27:33.104759 #7092] INFO -- : user1@company.com Child
Project 3 - No changes to Team Membership
I, [2013-02-03T23:27:33.104759 #7092] INFO -- : user1@company.com Child
Project 2 - Permission set to No Access
I, [2013-02-03T23:27:33.321772 #7092] INFO -- : user1@company.com Child
Project 2 - No changes to Team Membership
I, [2013-02-03T23:27:33.322772 #7092] INFO -- : user1@company.com Child
Project 1 - Permission set to No Access
I, [2013-02-03T23:27:33.539784 #7092] INFO -- : user1@company.com Child
Project 1 - No changes to Team Membership
I, [2013-02-03T23:27:33.539784 #7092] INFO -- : user1@company.com Sandbox -
No permission updates
I, [2013-02-03T23:27:33.540784 #7092] INFO -- : user1@company.com Sandbox -
No changes to Team Membership
I, [2013-02-03T23:27:33.541784 #7092] INFO -- : user1@company.com Couloir
Chute Mapping: Heli-Ski - No permission updates
I, [2013-02-03T23:27:33.541784 #7092] INFO -- : user1@company.com Couloir
Chute Mapping: Heli-Ski - No changes to Team Membership
I, [2013-02-03T23:27:33.541784 #7092] INFO -- : user1@company.com Open-Source
Online Mapping Server - No permission updates
I, [2013-02-03T23:27:34.290827 #7092] INFO -- : user1@company.com Open-Source
Online Mapping Server - Team Membership set to No
I, [2013-02-03T23:27:34.291827 #7092] INFO -- : user1@company.com Avalanche
Hazard Mapping - No permission updates
I, [2013-02-03T23:27:34.291827 #7092] INFO -- : user1@company.com Avalanche
Hazard Mapping - No changes to Team Membership

```

21. Check the Users in Rally and verify the Appropriate permissions:



UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	Team Member	ObjectID
user1@company.com	One	User	User One	WorkspacePermission	Mark W VS-TFS	Mark W VS-TFS	User	N/A	9207058860
user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A	2890498610
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	TFSPProject	Editor	Yes	9207058950
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes	4929903520
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	No Access	No	2975793255
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	No Access	No	2975793052
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes	2975788132
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	No	2890498688
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	No	4625248927
user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes	2890731604

## VI. User Management Tool: Bulk Enable or Disable Users

1. During routine User maintenance, it may be desirable to bulk disable or enable Users. For instance, a bulk disable procedure may be desired in order to free up Rally seats by disabling Users who infrequently use the tool.
2. Scripts used:

- i. `enable_or_disable_users.rb`

3. Find the `enable_or_disable_users.rb` script.
4. Prepare a simple “one-column” Text file containing a list of the Rally UserID’s you wish to Enable or Disable:

```
user_list.txt:
=====
```

```
UserID
user2@company.com
user3@company.com
```

5. Make sure to leave the first row column header “UserID” intact – the script automatically skips the first row.
6. Execute the script, providing an argument specifying whether you wish to `enable` or `disable` the users in the file:

```
C:\> ruby enable_or_disable_users.rb user_list.txt disable
Rally user user2@company.com successfully disabled.
Rally user user3@company.com successfully disabled.
```

7. Enabling Users is exactly analogous, except using the `enable` flag:

```
C:\> ruby enable_or_disable_users.rb user_list.txt enable

Rally user user2@company.com successfully enabled.
Rally user user3@company.com successfully enabled.
```

## VII. User Management Tool: Bulk Change Usernames and Email Addresses

1. Scripts used:

- `change_usernames.rb`

2. Create your user mapping file. It must be a plain text CSV file with the following format:

```
Existing Username/Email, New Username/Email
aragorn@midearth.com, aragorn@gondor.com
boromir@midearth.com, boromir@gondor.com
```

3. There is a sample template file called `change_usernames_template.csv` in the user management directory.
4. The script will update *both* Username and Email address from the value in the first column, to the value in the second column. If the script lookup against Rally for the Existing Username in the first column fails to find the user of interest, it will skip that row and move on.

- Using a text editor, customize the code parameters in the my\_vars.rb file for your environment. The \$mode variable can be used to toggle the script update mode:

```
:usernameandemail => resets both UserName and Email to the updated value
:usernameonly => only resets UserName. Email address remains unchanged
```

**Note:** The credentials used in this script must belong to a Subscription Administrator in order to have the appropriate level of permissions to make these changes.

```
my_vars.rb:
=====

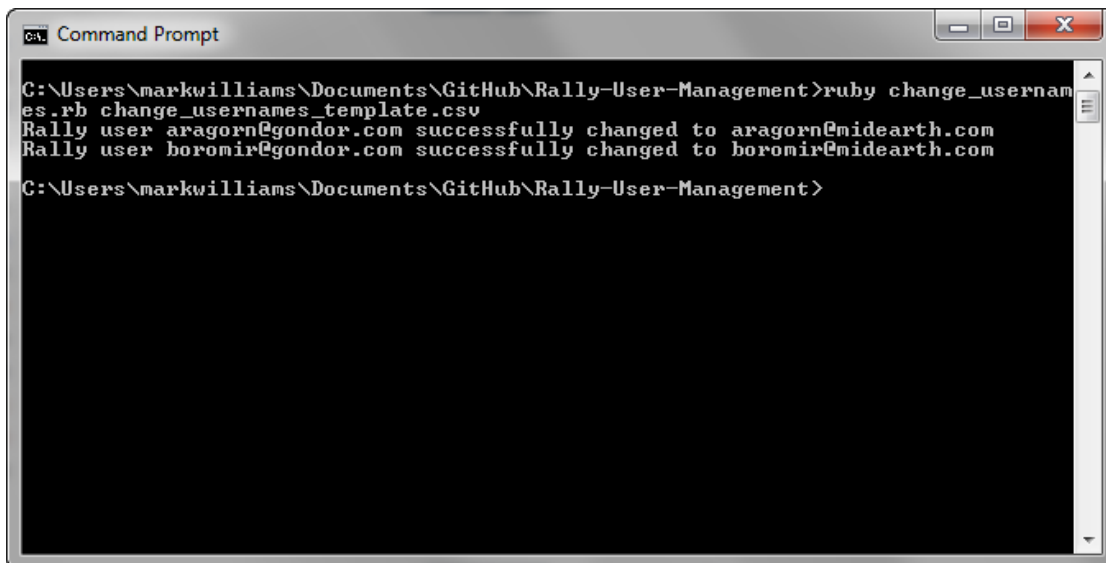
$my_username          = 'user@company.com'
$my_password          = 'topsecret'
$my_base_url          = "https://rally1.rallydev.com/slm"

#API Version
$wsapi_version        = "1.41"

# Mode options:
# :usernameandemail => resets both UserName and Email to the updated value
# :usernameonly => only resets UserName. Email address remains unchanged
$mode                 = :usernameandemail
```

- Run the script.

```
ruby change_usernames.rb change_usernames.csv
```



```

C:\Users\markwilliams\Documents\GitHub\Rally-User-Management>ruby change_usernames.rb change_usernames_template.csv
Rally user aragorn@gondor.com successfully changed to aragorn@midearth.com
Rally user boromir@gondor.com successfully changed to boromir@midearth.com
C:\Users\markwilliams\Documents\GitHub\Rally-User-Management>

```

**Please Note:** This will update the username for ALL USERS listed in the users\_update.csv file. Please be CAUTIOUS WHEN USING THIS SCRIPT.

## VIII. User Management Tool: LDAP user load script for Rally On-Premise

1. During setup of Rally On-Premise LDAP feature, you may need to update all existing users in your Rally subscription with the corresponding "Onprem Ldap Username".
2. Scripts used:
  - i. ldap\_user\_load.rb
3. Find the ldap\_user\_load.rb script.
4. Use a text editor to edit the script above to match your own Rally On-Premise settings:

```
rally_url      = https://10.32.10.120/slm #(Enter the IP address/hostname of your
own server)
rally_user     = subadmin@company.com #(Enter credentials for a Rally Subscription
Administrator)
rally_password = "topsecret"
rally_ws_version = "1.33" # (Modify the WSAPI version if desired)
filename       = 'ldap_username_load_template.csv' # (Edit to match the filename of
your .csv)
```

5. Prepare a two-column, comma-delimited text file containing a list of values for the fields UserName and LdapOnpremUserName. There is a template file called ldap\_username\_load\_template.csv to get you started. The name of this file needs to match the "filename" variable as seen on step 4. The file should contain the following information:

```
UserName, LdapOnpremUserName
user1@company.com, user1
user2@company.com, user2
user3@company.com, user3
```

6. Run the script with the following command:

```
$ ruby ldap_username_load.rb
Rally user user1@company.com updated successfully - onprem username set to
user1
Rally user user2@company.com updated successfully - onprem username set to
user2
Rally user user3@company.com updated successfully - onprem username set to
user3
Querying to find existing Rally Users without an OnpremLdapUsername
attribute...
Found: 4 that do not have an OnpremLdapUsername.
Listing...
Rally user user4@company.com does not contain a ldap onprem username value
Rally user user5@company.com does not contain a ldap onprem username value
Rally user user6@company.com does not contain a ldap onprem username value
Rally user user7@company.com does not contain a ldap onprem username value
```

7. As seen in the sample output above, the script will summarize the updates made, and when updates are complete, will output remaining users that do not contain a value in the Ldap Onprem Username field.
8. If the LDAP feature has been enabled in the Control Panel, try the login using one of the Onprem Ldap Usernames created.