

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*.

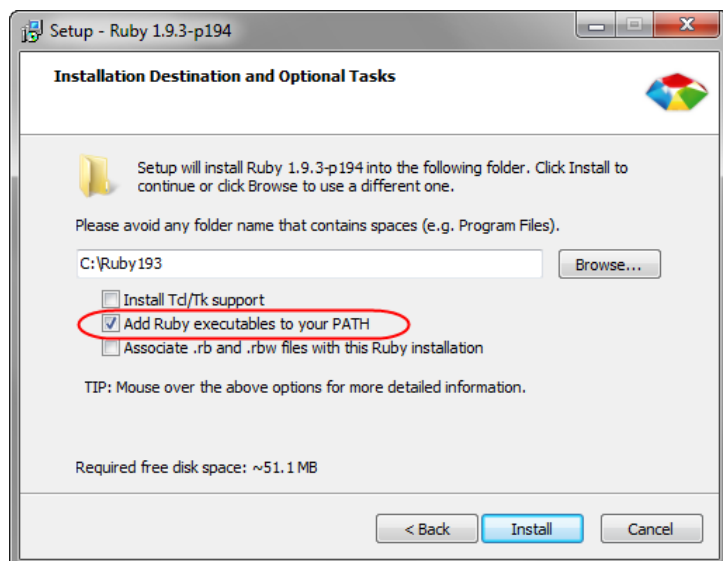
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I. Installing Ruby on Windows

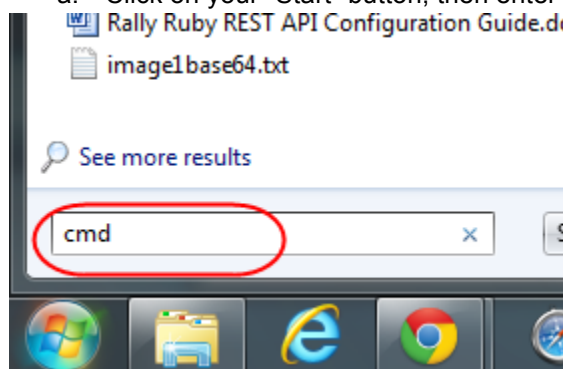
Install the Ruby 1.9.3 Runtime Environment: <http://rubyinstaller.org/downloads/>

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

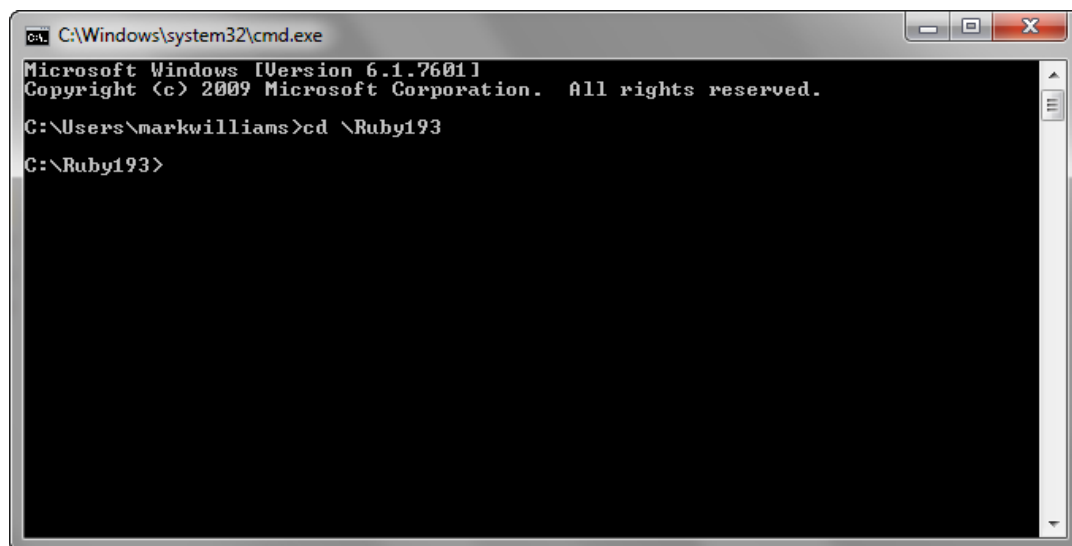


2. Open a command prompt window and go to the ruby directory that was created. In this example, Ruby was installed into C:\Ruby193:

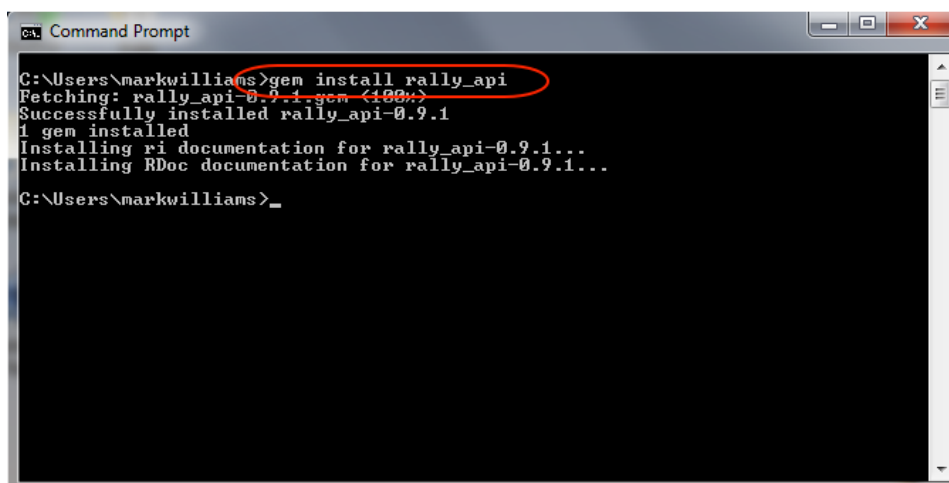
- a. Click on your “Start” button, then enter cmd into the search dialog and hit Enter.



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




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 'markwilliams' at 'C:\Users\markwilliams' typing 'gem install rally_api'. The output shows the gem being fetched, successfully installed, and documentation being installed. The command 'gem install rally_api' is circled in red.

```
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.

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

*** LOCAL GEMS ***

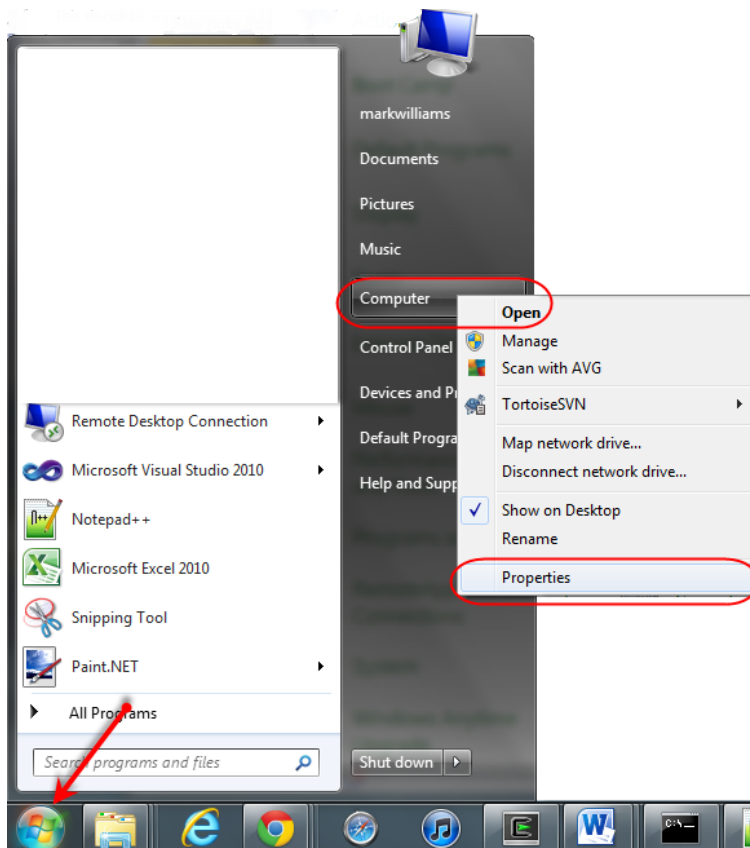
bigdecimal (1.1.0)
httpclient (2.3.2)
io-console (0.3)
mime-types (1.19)
minitest (2.5.1)
pik (0.2.8)
rake (10.0.3)
rally_api (0.9.1)
rest-client (1.6.7)

C:\Users\markwilliams>
```

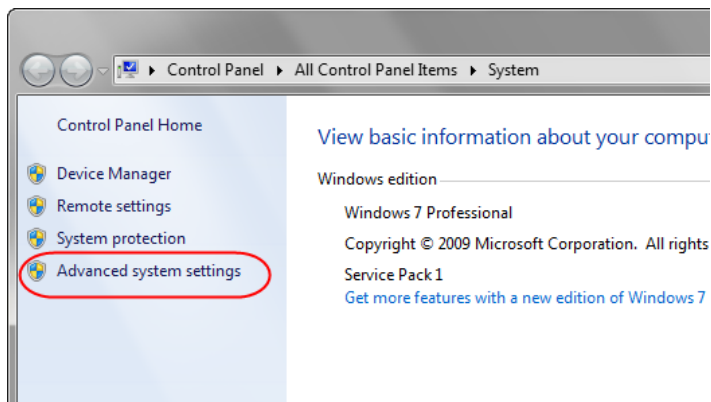
II. Configuring a Proxy Server

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:

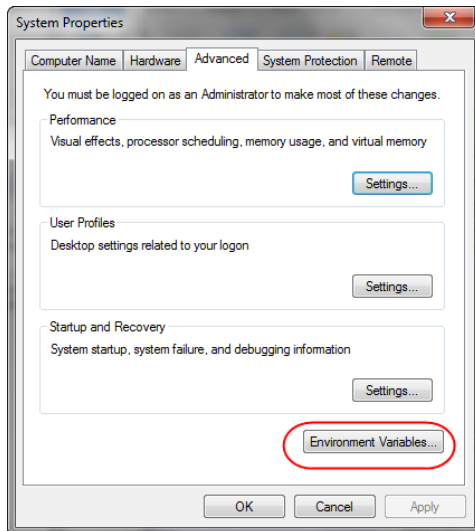
Start -> Computer (Right Click) -> Properties:



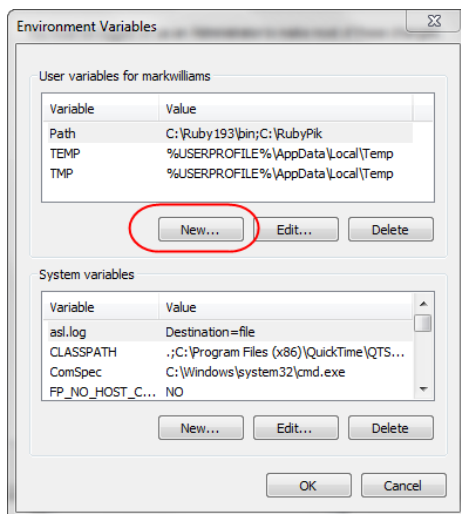
2. Advanced System Settings:



3. Environment Variables:



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



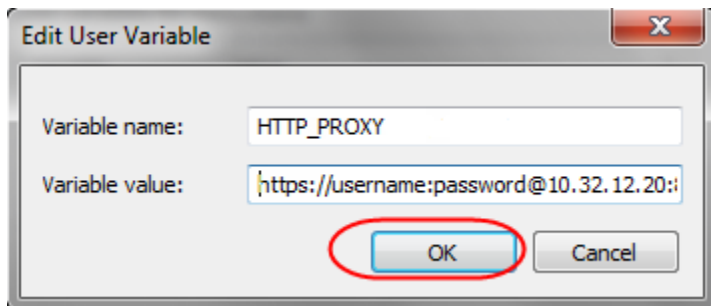
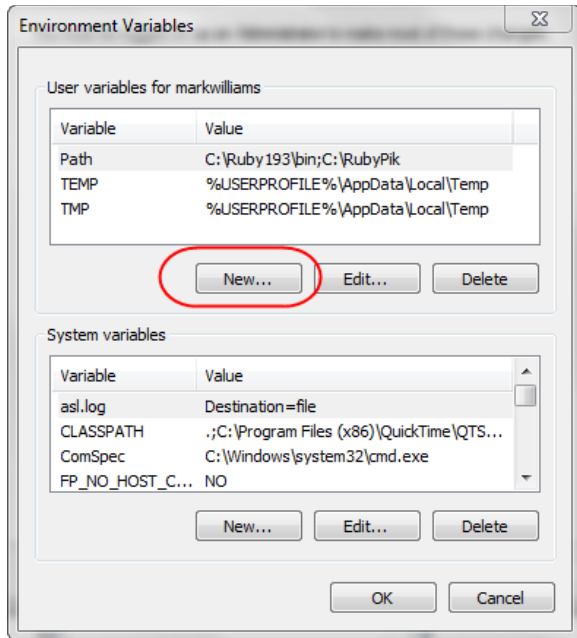
5. Create the following environment variables:

- 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:



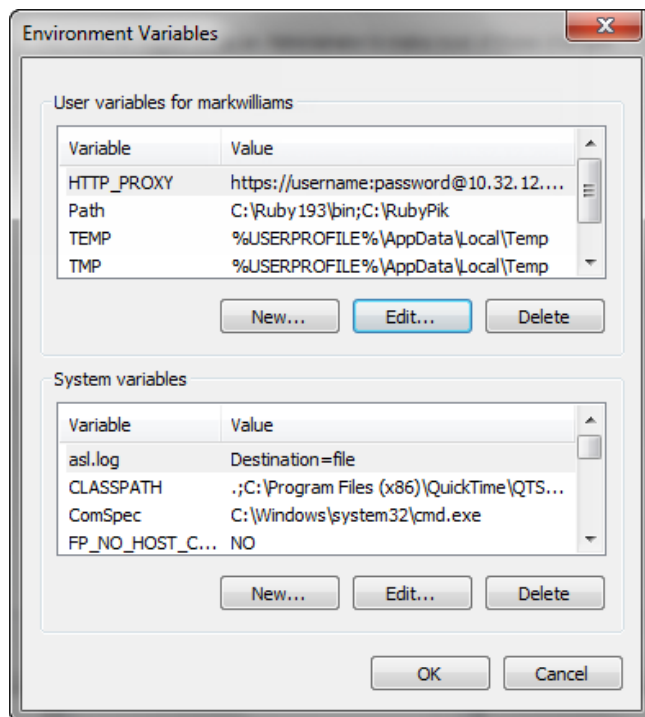
In this example you entered:

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/markwilliams970/user_mgmt_2.git

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"
```

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:

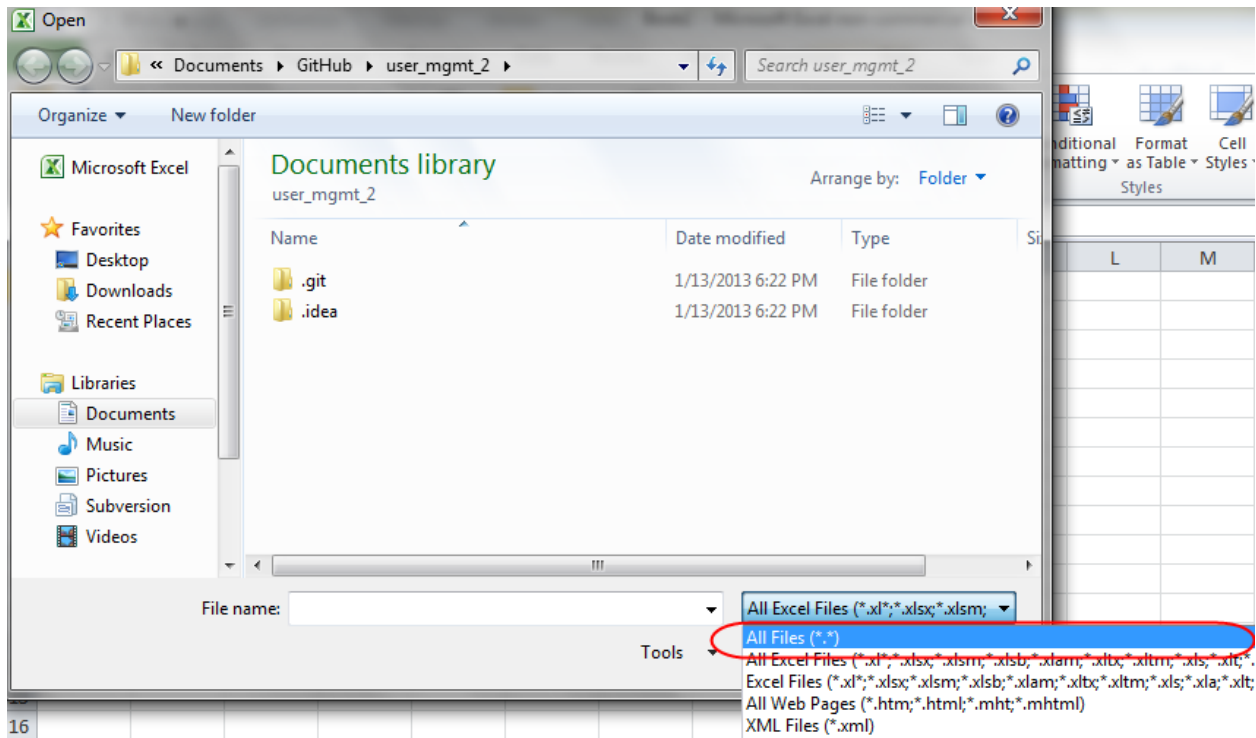
- UserName: user1@company.com
- LastName: One
- FirstName: User
- DisplayName: User One

| | 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 |

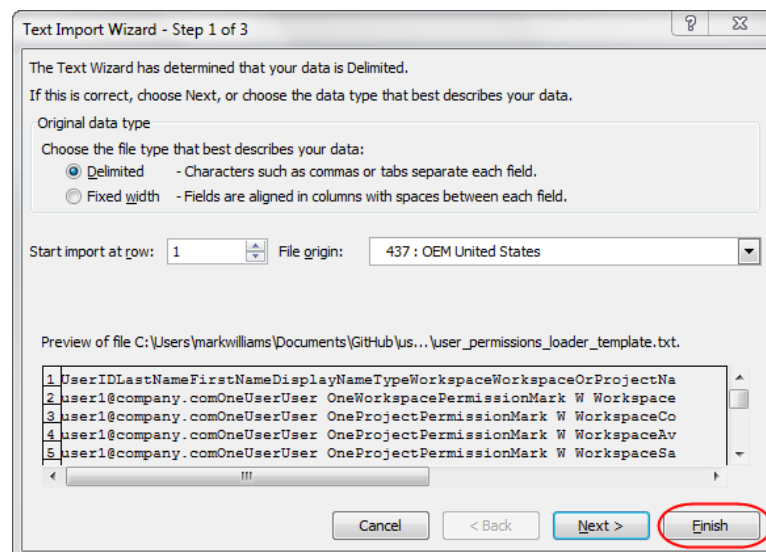
5. Find the `user_permissions_template_generator.rb` script. This script will use the list of New Users to prepare a *tab-delimited text template file of UserPermissions* that is editable in Excel. The output file is called `user_permissions_loader_template.txt` by default.
6. Run the script.

```
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.
```

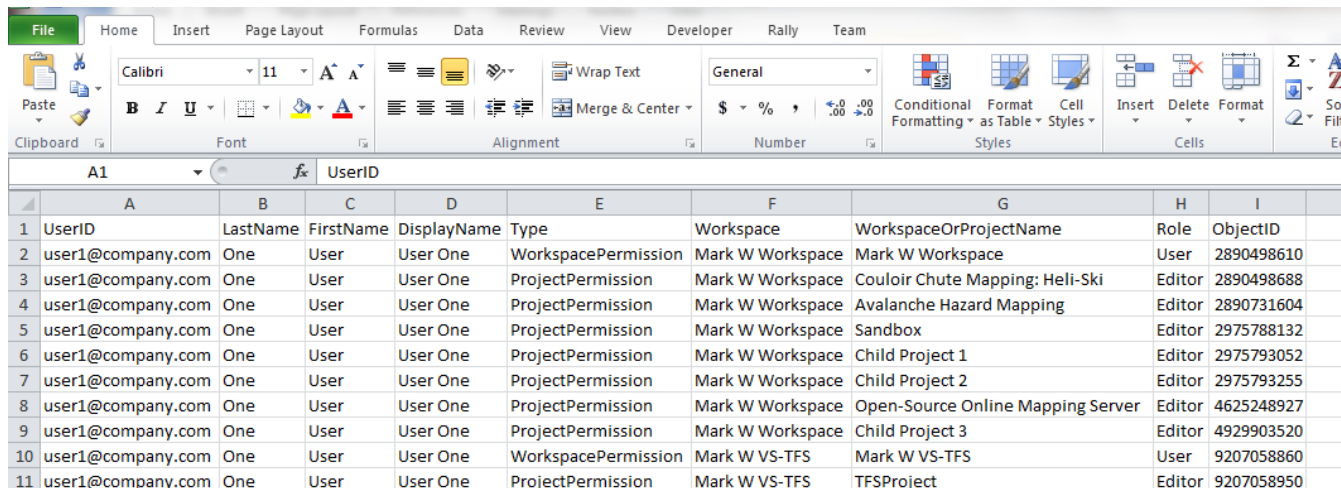

7. Open the `user_permissions_loader_template.txt` in Excel. Since it is a *tab-delimited text file*, you'll need to start Excel first.
8. File -> Open and navigate to and open `user_permissions_loader_template.txt`
9. Note that in order to show .txt files within the File -> Open dialog, you'll need 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:



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

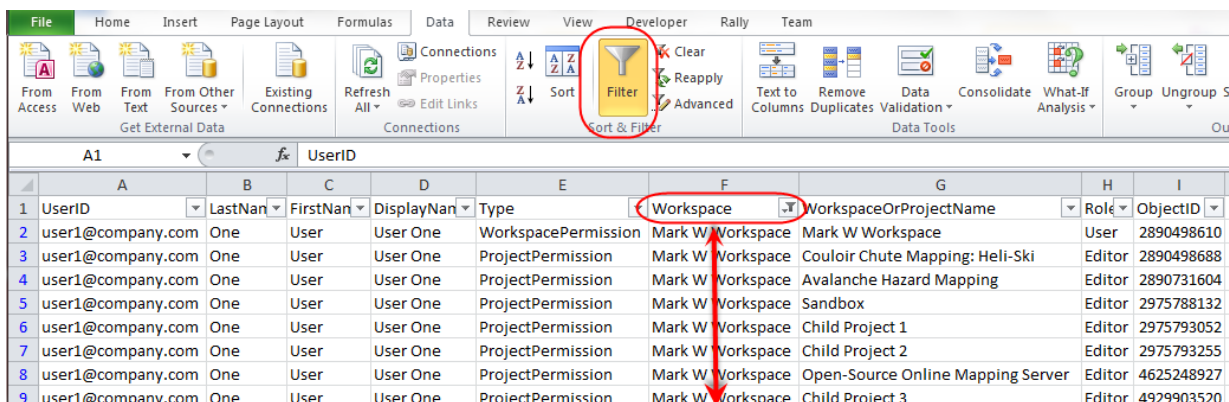


| | A | B | C | D | E | F | G | H | I |
|----|-------------------|----------|-----------|-------------|---------------------|------------------|-----------------------------------|--------|------------|
| 1 | UserID | LastName | FirstName | DisplayName | Type | Workspace | WorkspaceOrProjectName | Role | 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:



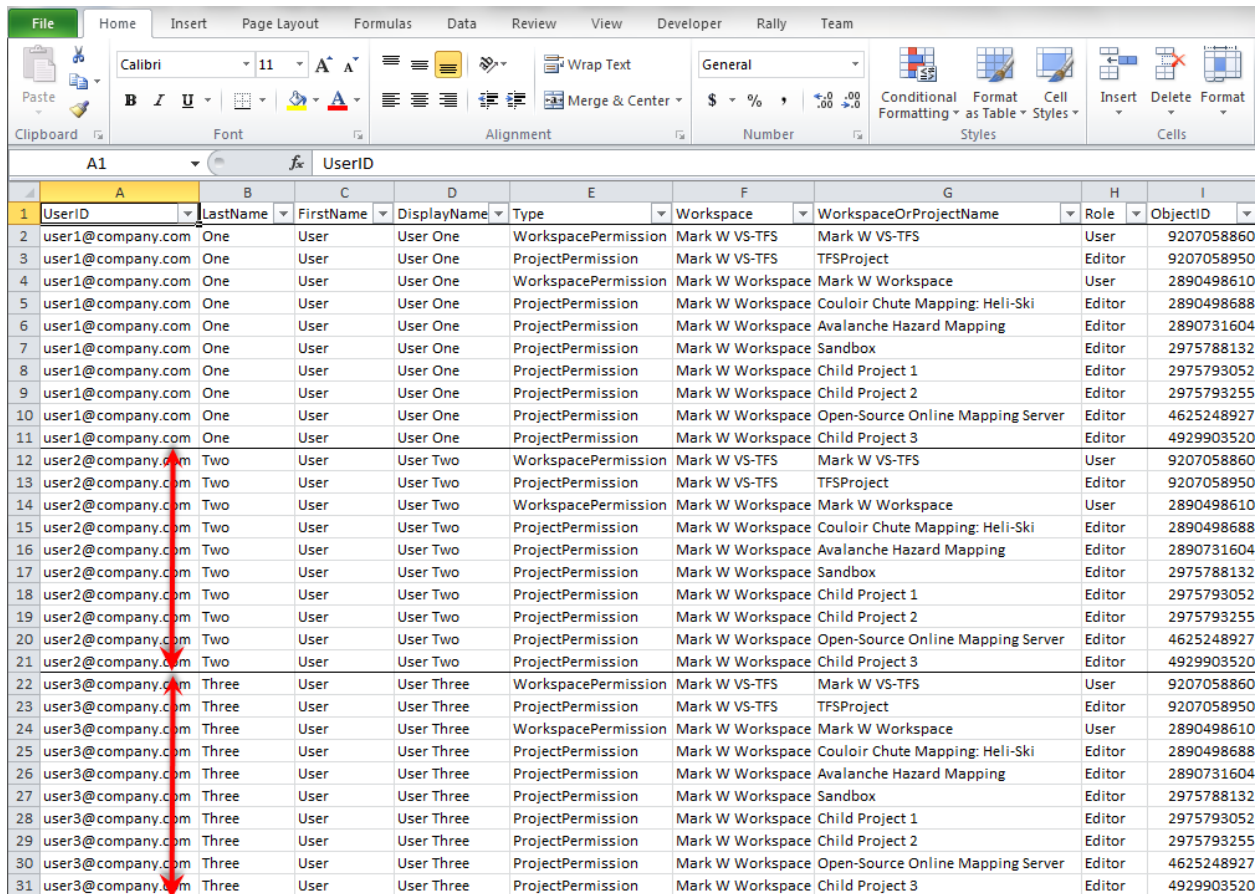
| | A | B | C | D | E | F | G | H | I |
|---|-------------------|----------|-----------|-------------|---------------------|------------------|-----------------------------------|--------|------------|
| 1 | UserID | LastName | FirstName | DisplayName | Type | Workspace | WorkspaceOrProjectName | Role | 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 |
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| 9 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 3 | Editor | 4929903520 |

| A1 | | | | | | | | | |
|----|-------------------|----------|-----------|-------------|---------------------|------------------|-----------------------------------|--------|------------|
| | A | B | C | D | E | F | G | H | I |
| 1 | UserID | LastName | FirstName | DisplayName | Type | Workspace | WorkspaceOrProjectName | Role | ObjectID |
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| 11 | user1@company.com | One | User | User One | ProjectPermission | Mark W VS-TFS | TFSPProject | Editor | 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:
 - Administrator
 - User
 - No Access
 - Valid **ProjectPermission** Roles:
 - Editor
 - Viewer
 - No Access
- **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 |
|----|-------------------|----------|-----------|-------------|---------------------|------------------|-----------------------------------|--------|------------|
| | UserID | LastName | FirstName | DisplayName | Type | Workspace | WorkspaceOrProjectName | Role | ObjectID |
| 2 | user1@company.com | One | User | User One | WorkspacePermission | Mark W VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 3 | user1@company.com | One | User | User One | ProjectPermission | Mark W VS-TFS | TFSProject | Editor | 9207058950 |
| 4 | user1@company.com | One | User | User One | WorkspacePermission | Mark W Workspace | Mark W Workspace | User | 2890498610 |
| 5 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
| 6 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor | 2890731604 |
| 7 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Sandbox | Editor | 2975788132 |
| 8 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 1 | Editor | 2975793052 |
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| 10 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | Editor | 4625248927 |
| 11 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 3 | Editor | 4929903520 |
| 12 | user2@company.com | Two | User | User Two | WorkspacePermission | Mark W VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 13 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W VS-TFS | TFSProject | Editor | 9207058950 |
| 14 | user2@company.com | Two | User | User Two | WorkspacePermission | Mark W Workspace | Mark W Workspace | User | 2890498610 |
| 15 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
| 16 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor | 2890731604 |
| 17 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Sandbox | Editor | 2975788132 |
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| 20 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | Editor | 4625248927 |
| 21 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Child Project 3 | Editor | 4929903520 |
| 22 | user3@company.com | Three | User | User Three | WorkspacePermission | Mark W VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 23 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W VS-TFS | TFSProject | Editor | 9207058950 |
| 24 | user3@company.com | Three | User | User Three | WorkspacePermission | Mark W Workspace | Mark W Workspace | User | 2890498610 |
| 25 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
| 26 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor | 2890731604 |
| 27 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Sandbox | Editor | 2975788132 |
| 28 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Child Project 1 | Editor | 2975793052 |
| 29 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Child Project 2 | Editor | 2975793255 |
| 30 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | Editor | 4625248927 |
| 31 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Child Project 3 | Editor | 4929903520 |

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.

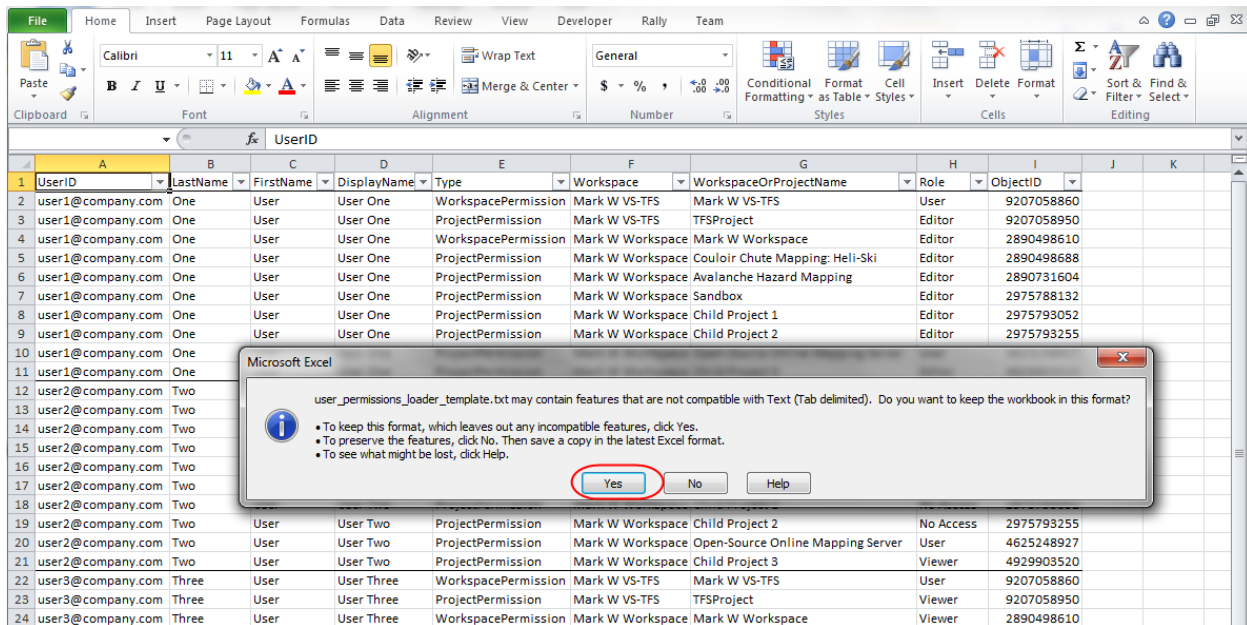
15. Now adjust the Role column to match the permissions desired for each user within the Workspace/Project of interest:

| File Home Insert Page Layout Formulas Data Review View Developer Rally Team | | | | | | | | | |
|---|-------------------|----------|-----------|-------------|---------------------|------------------|-----------------------------------|-----------|------------|
| <div> <div>Clipboard</div> <div> <div>Calibri</div> <div>11</div> <div>A</div> <div>A</div> </div> <div> <div>B</div> <div>I</div> <div>U</div> <div></div> <div></div> <div></div> </div> <div> <div>Align Center</div> <div>Align Left</div> <div>Align Right</div> <div>Align Justify</div> </div> <div> <div>General</div> <div>Number</div> <div>Percentage</div> <div>Decimal</div> </div> <div> <div>Conditional Formatting</div> <div>Format as Table</div> <div>Cell Styles</div> </div> <div> <div>Insert</div> <div>Delete</div> <div>Format</div> </div> </div> | | | | | | | | | |
| A1 | UserID | | | | | | | | |
| | 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 VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 3 | user1@company.com | One | User | User One | ProjectPermission | Mark W VS-TFS | TFSProject | Editor | 9207058950 |
| 4 | user1@company.com | One | User | User One | WorkspacePermission | Mark W Workspace | Mark W Workspace | Editor | 2890498610 |
| 5 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
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| 8 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 1 | Editor | 2975793052 |
| 9 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 2 | Editor | 2975793255 |
| 10 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | User | 4625248927 |
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| 13 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W VS-TFS | TFSProject | Viewer | 9207058950 |
| 14 | user2@company.com | Two | User | User Two | WorkspacePermission | Mark W Workspace | Mark W Workspace | Viewer | 2890498610 |
| 15 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
| 16 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor | 2890731604 |
| 17 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Sandbox | Editor | 2975788132 |
| 18 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Child Project 1 | No Access | 2975793052 |
| 19 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Child Project 2 | No Access | 2975793255 |
| 20 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | User | 4625248927 |
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| 22 | user3@company.com | Three | User | User Three | WorkspacePermission | Mark W VS-TFS | Mark W VS-TFS | User | 9207058860 |
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| 29 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Child Project 2 | No Access | 2975793255 |
| 30 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | No Access | 4625248927 |
| 31 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Child Project 3 | No Access | 4929903520 |

Important Usage Notes:

- **Spelling:** Make sure to use the *exact* spellings for the allowed Role definitions, repeated here:
 - Valid **WorkspacePermission** Roles:
 - Administrator
 - 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. Once you've completed making 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:



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

13. 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.txt
```

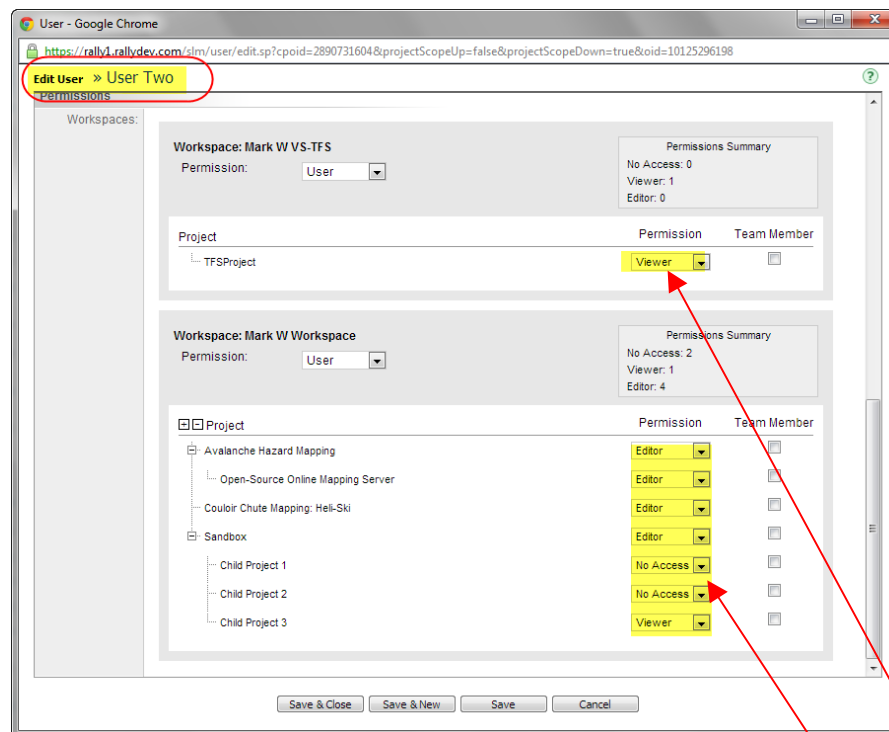
```
I, [2013-01-13T17:59:59.544734 #5556] INFO -- : Connecting to
https://rally1.rallydev.com/slm as sample.admin@rallydev.com...
I, [2013-01-13T18:00:00.516789 #5556] INFO -- : Instantiating User Helper...
I, [2013-01-13T18:00:00.517789 #5556] INFO -- : Caching workspaces and projects...
I, [2013-01-13T18:00:00.806806 #5556] INFO -- : This subscription has: 2 workspaces.
I, [2013-01-13T18:00:01.025818 #5556] INFO -- : Caching Workspace: Mark W Workspace.
I, [2013-01-13T18:00:01.025818 #5556] INFO -- : Workspace: Mark W Workspace has: 7 open
projects.
I, [2013-01-13T18:00:01.025818 #5556] INFO -- : Caching Project: Couloir Chute Mapping:
Heli-Ski
I, [2013-01-13T18:00:01.025818 #5556] INFO -- : Caching Project: Avalanche Hazard Mapping
I, [2013-01-13T18:00:01.025818 #5556] INFO -- : Caching Project: Sandbox
I, [2013-01-13T18:00:01.026819 #5556] INFO -- : Caching Project: Child Project 1
I, [2013-01-13T18:00:01.026819 #5556] INFO -- : Caching Project: Child Project 2
I, [2013-01-13T18:00:01.026819 #5556] INFO -- : Caching Project: Open-Source Online Mapping
Server
I, [2013-01-13T18:00:01.026819 #5556] INFO -- : Caching Project: Child Project 3
I, [2013-01-13T18:00:01.186828 #5556] INFO -- : Caching Workspace: Mark W VS-TFS.
I, [2013-01-13T18:00:01.186828 #5556] INFO -- : Workspace: Mark W VS-TFS has: 1 open
projects.
I, [2013-01-13T18:00:01.187828 #5556] INFO -- : Caching Project: TFSProject
I, [2013-01-13T18:00:01.187828 #5556] INFO -- : Caching user list...
I, [2013-01-13T18:00:02.621910 #5556] INFO -- : Cached 25 of 263 users
I, [2013-01-13T18:00:02.621910 #5556] INFO -- : Cached 50 of 263 users
I, [2013-01-13T18:00:02.621910 #5556] INFO -- : Cached 75 of 263 users
```

```

I, [2013-01-13T18:00:02.622910 #5556] INFO -- : Cached 100 of 263 users
I, [2013-01-13T18:00:02.622910 #5556] INFO -- : Cached 125 of 263 users
I, [2013-01-13T18:00:02.622910 #5556] INFO -- : Cached 150 of 263 users
I, [2013-01-13T18:00:02.622910 #5556] INFO -- : Cached 175 of 263 users
I, [2013-01-13T18:00:02.623910 #5556] INFO -- : Cached 200 of 263 users
I, [2013-01-13T18:00:02.623910 #5556] INFO -- : Cached 225 of 263 users
I, [2013-01-13T18:00:02.623910 #5556] INFO -- : Cached 250 of 263 users
I, [2013-01-13T18:00:02.757918 #5556] INFO -- : User user1@company.com does not yet exist.
Creating...
I, [2013-01-13T18:00:03.448957 #5556] INFO -- : Created Rally user user1@company.com
I, [2013-01-13T18:00:03.448957 #5556] INFO -- : user1@company.com Mark W VS-TFS -
Permission set to User
I, [2013-01-13T18:00:04.094994 #5556] INFO -- : Editor
I, [2013-01-13T18:00:04.094994 #5556] INFO -- : user1@company.com TFSPProject - Permission
set to Editor

```

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



| User Two | ProjectPermission | Mark W VS-TFS | TFSPProject | Viewer |
|----------|-------------------|------------------|-----------------------------------|-----------|
| User Two | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor |
| User Two | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor |
| User Two | ProjectPermission | Mark W Workspace | Sandbox | Editor |
| User Two | ProjectPermission | Mark W Workspace | Child Project 1 | No Access |
| User Two | ProjectPermission | Mark W Workspace | Child Project 2 | No Access |
| User Two | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | Editor |
| User Two | ProjectPermission | Mark W Workspace | Child Project 3 | Viewer |

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: Updating User Permissions

Warning!!! Although Team Membership is a Read-Only attribute in Rally Webservices, it is possible to remove the Team Membership attribute by setting a User's ProjectPermission to NoAccess on a Project for which that User is a Team Member. The Team Membership attribute ***is not guaranteed to be preserved*** when Updating User Permissions using this script.

1. Scripts used:

- user_permissions_summary.rb
- user_permissions_uploader.rb

2. Find the user_permissions_uploader.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.

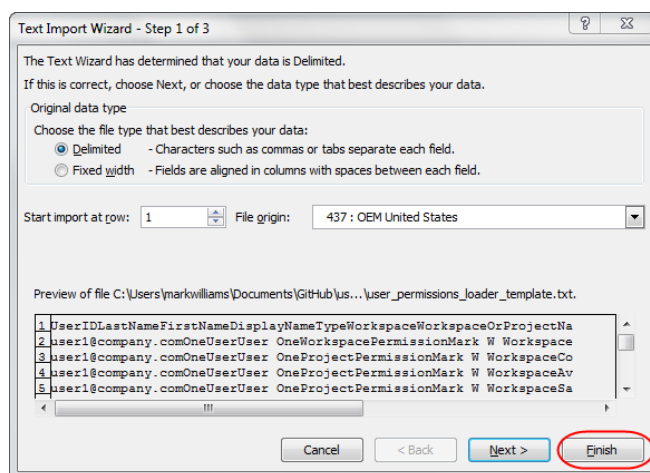
3. Run the script:

```
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_loader_template.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.

| 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 |
| 1 | UserID | LastName | FirstName | DisplayName | Type | Workspace | WorkspaceOrProjectName | Role | ObjectID |
| 2 | user1@company.com | One | User | User One | WorkspacePermission | Mark W VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 3 | user1@company.com | One | User | User One | WorkspacePermission | Mark W Workspace | Mark W Workspace | User | 2890498610 |
| 4 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | TFSPProject | Editor | 9207058950 |
| 5 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 3 | Editor | 4929903520 |
| 6 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 2 | Editor | 2975793255 |
| 7 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 1 | Editor | 2975793052 |
| 8 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Sandbox | Editor | 2975788132 |
| 9 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
| 10 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | Editor | 4625248927 |
| 11 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor | 2890731604 |
| 12 | user2@company.com | Two | User | User Two | WorkspacePermission | Mark W VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 13 | user2@company.com | Two | User | User Two | WorkspacePermission | Mark W Workspace | Mark W Workspace | User | 2890498610 |
| 14 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | TFSPProject | Viewer | 9207058950 |
| 15 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Child Project 3 | Viewer | 4929903520 |
| 16 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Sandbox | Editor | 2975788132 |
| 17 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
| 18 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | Editor | 4625248927 |
| 19 | user2@company.com | Two | User | User Two | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor | 2890731604 |
| 20 | user3@company.com | Three | User | User Three | WorkspacePermission | Mark W VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 21 | user3@company.com | Three | User | User Three | WorkspacePermission | Mark W Workspace | Mark W Workspace | User | 2890498610 |
| 22 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | TFSPProject | Viewer | 9207058950 |
| 23 | user3@company.com | Three | User | User Three | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Viewer | 2890498688 |

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.

8. 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.

| | 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 VS-TFS | Mark W VS-TFS | User | 9207058860 |
| 3 | user1@company.com | One | User | User One | WorkspacePermission | Mark W Workspace | Mark W Workspace | User | 2890498610 |
| 4 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | TFSPProject | Editor | 9207058950 |
| 5 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 3 | Editor | 4929903520 |
| 6 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 2 | Editor | 2975793255 |
| 7 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Child Project 1 | Editor | 2975793052 |
| 8 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Sandbox | Editor | 2975788132 |
| 9 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Couloir Chute Mapping: Heli-Ski | Editor | 2890498688 |
| 10 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Open-Source Online Mapping Server | Editor | 4625248927 |
| 11 | user1@company.com | One | User | User One | ProjectPermission | Mark W Workspace | Avalanche Hazard Mapping | Editor | 2890731604 |

9. Now, adjust the Role column as appropriate to change the desired permissions:

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

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

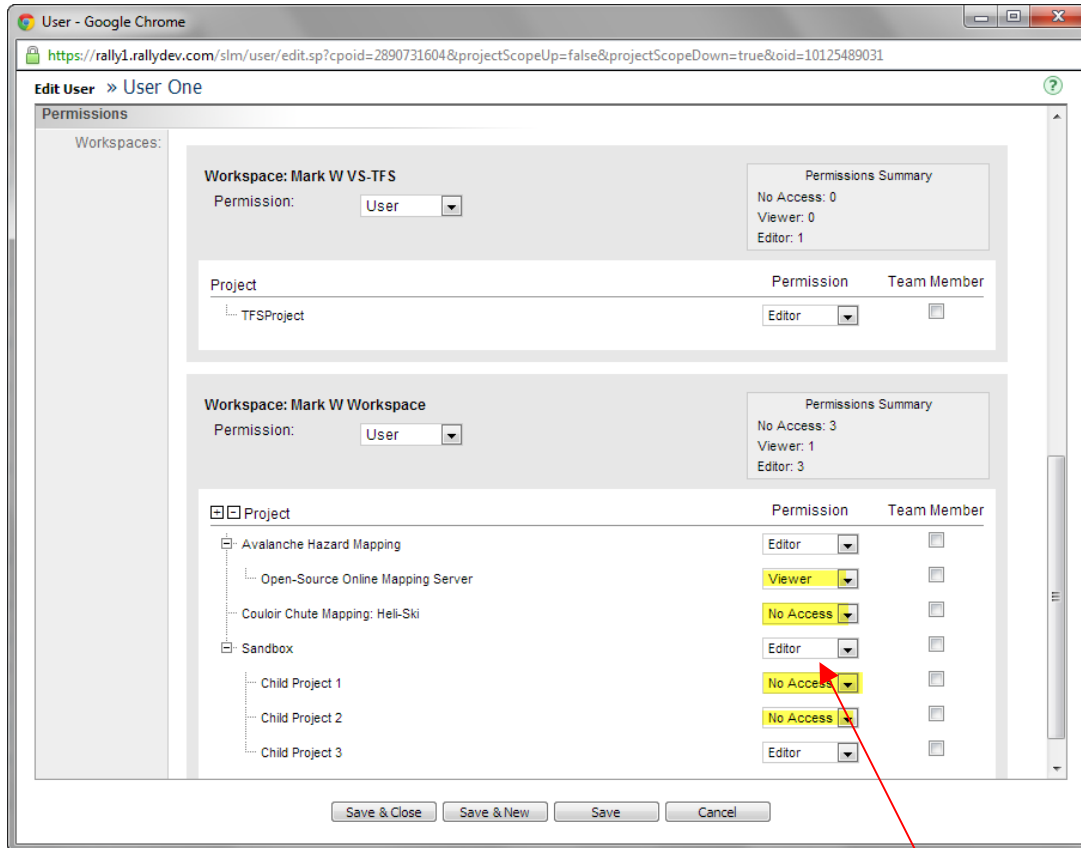
```
C:\> ruby user_permissions_loader.rb user_permissions_loader.txt
I, [2013-01-13T19:07:19.327796 #5324] INFO -- : Connecting to
https://rally1.rallydev.com/slm as sample.admin@rallydev.com...
I, [2013-01-13T19:07:20.027836 #5324] INFO -- : Instantiating User Helper...
I, [2013-01-13T19:07:20.027836 #5324] INFO -- : Caching workspaces and
projects...
I, [2013-01-13T19:07:20.249849 #5324] INFO -- : This subscription has: 2
workspaces.
I, [2013-01-13T19:07:20.478862 #5324] INFO -- : Caching Workspace: Mark W
Workspace.
I, [2013-01-13T19:07:20.478862 #5324] INFO -- : Workspace: Mark W Workspace
has: 7 open projects.
I, [2013-01-13T19:07:20.478862 #5324] INFO -- : Caching Project: Couloir Chute
Mapping: Heli-Ski
I, [2013-01-13T19:07:20.479862 #5324] INFO -- : Caching Project: Avalanche
Hazard Mapping
I, [2013-01-13T19:07:20.479862 #5324] INFO -- : Caching Project: Sandbox
I, [2013-01-13T19:07:20.479862 #5324] INFO -- : Caching Project: Child Project
1
I, [2013-01-13T19:07:20.479862 #5324] INFO -- : Caching Project: Child Project
2
I, [2013-01-13T19:07:20.479862 #5324] INFO -- : Caching Project: Open-Source
Online Mapping Server
I, [2013-01-13T19:07:20.479862 #5324] INFO -- : Caching Project: Child Project
3
```

```

I, [2013-01-13T19:07:20.827882 #5324] INFO -- : Caching Workspace: Mark W VS-
TFS.
I, [2013-01-13T19:07:20.827882 #5324] INFO -- : Workspace: Mark W VS-TFS has: 1
open projects.
I, [2013-01-13T19:07:20.827882 #5324] INFO -- : Caching Project: TFSPProject
I, [2013-01-13T19:07:20.827882 #5324] INFO -- : Caching user list...
I, [2013-01-13T19:07:22.055952 #5324] INFO -- : Cached 25 of 266 users
I, [2013-01-13T19:07:22.056952 #5324] INFO -- : Cached 50 of 266 users
I, [2013-01-13T19:07:22.056952 #5324] INFO -- : Cached 75 of 266 users
I, [2013-01-13T19:07:22.057952 #5324] INFO -- : Cached 100 of 266 users
I, [2013-01-13T19:07:22.057952 #5324] INFO -- : Cached 125 of 266 users
I, [2013-01-13T19:07:22.057952 #5324] INFO -- : Cached 150 of 266 users
I, [2013-01-13T19:07:22.058952 #5324] INFO -- : Cached 175 of 266 users
I, [2013-01-13T19:07:22.058952 #5324] INFO -- : Cached 200 of 266 users
I, [2013-01-13T19:07:22.058952 #5324] INFO -- : Cached 225 of 266 users
I, [2013-01-13T19:07:22.059952 #5324] INFO -- : Cached 250 of 266 users
I, [2013-01-13T19:07:22.062953 #5324] INFO -- : user1@company.com Mark W VS-
TFS - No permission updates
I, [2013-01-13T19:07:22.062953 #5324] INFO -- : user1@company.com Mark W
Workspace - No permission updates
I, [2013-01-13T19:07:22.062953 #5324] INFO -- : Editor
I, [2013-01-13T19:07:22.063953 #5324] INFO -- : user1@company.com TFSPProject
- No permission updates
I, [2013-01-13T19:07:22.063953 #5324] INFO -- : Editor
I, [2013-01-13T19:07:22.063953 #5324] INFO -- : user1@company.com Child
Project 3 - No permission updates
I, [2013-01-13T19:07:22.063953 #5324] INFO -- : No Access
I, [2013-01-13T19:07:22.064953 #5324] INFO -- : user1@company.com Child
Project 2 - Permission set to No Access
I, [2013-01-13T19:07:22.548980 #5324] INFO -- : No Access
I, [2013-01-13T19:07:22.549980 #5324] INFO -- : user1@company.com Child
Project 1 - Permission set to No Access
I, [2013-01-13T19:07:22.918002 #5324] INFO -- : Editor
I, [2013-01-13T19:07:22.919002 #5324] INFO -- : user1@company.com Sandbox -
No permission updates
I, [2013-01-13T19:07:22.919002 #5324] INFO -- : No Access
I, [2013-01-13T19:07:22.919002 #5324] INFO -- : user1@company.com Couloir
Chute Mapping: Heli-Ski - Permission set to No Access
I, [2013-01-13T19:07:23.303024 #5324] INFO -- : Viewer
I, [2013-01-13T19:07:23.304024 #5324] INFO -- : user1@company.com Open-Source
Online Mapping Server - Permission set to Viewer
I, [2013-01-13T19:07:23.800052 #5324] INFO -- : Editor
I, [2013-01-13T19:07:23.800052 #5324] INFO -- : user1@company.com Avalanche
Hazard Mapping - No permission updates

```

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



Edit User » User One

Permissions

Workspaces:

Workspace: Mark W VS-TFS
 Permission: User

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

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

Workspace: Mark W Workspace
 Permission: User

Permissions Summary
 No Access: 3
 Viewer: 1
 Editor: 3

| Project | Permission | Team Member |
|-----------------------------------|------------|--------------------------|
| Avalanche Hazard Mapping | Editor | <input type="checkbox"/> |
| Open-Source Online Mapping Server | Viewer | <input type="checkbox"/> |
| Couloir Chute Mapping: Heli-Ski | No Access | <input type="checkbox"/> |
| Sandbox | Editor | <input type="checkbox"/> |
| Child Project 1 | No Access | <input type="checkbox"/> |
| Child Project 2 | No Access | <input type="checkbox"/> |
| Child Project 3 | Editor | <input type="checkbox"/> |

Save & Close Save & New Save Cancel

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

V. 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.
```