

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*.

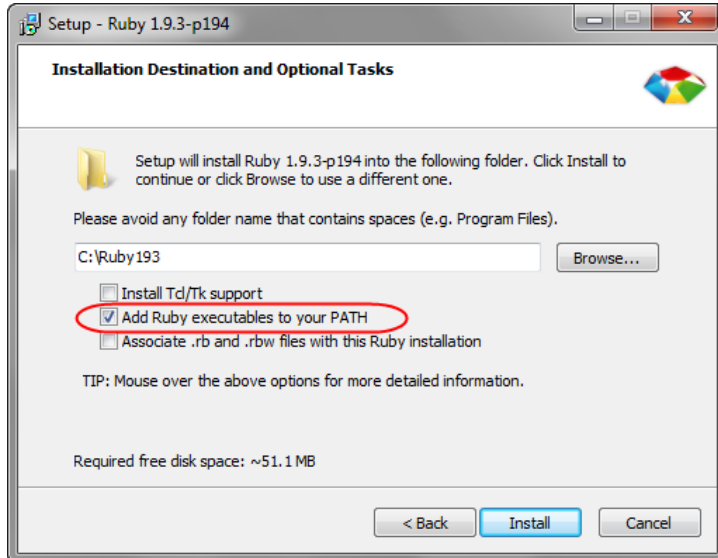
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I. Installing Ruby on Windows

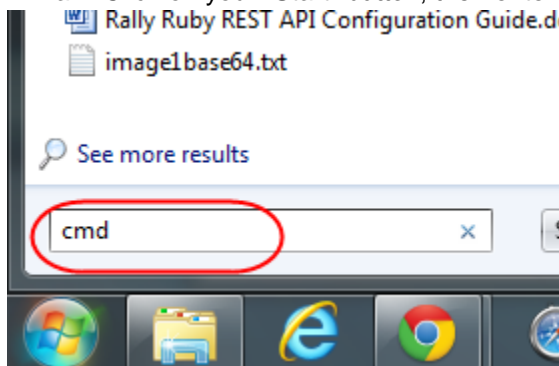
Install the Ruby 1.9.3 Runtime Environment: <http://rubyinstaller.org/downloads/>

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

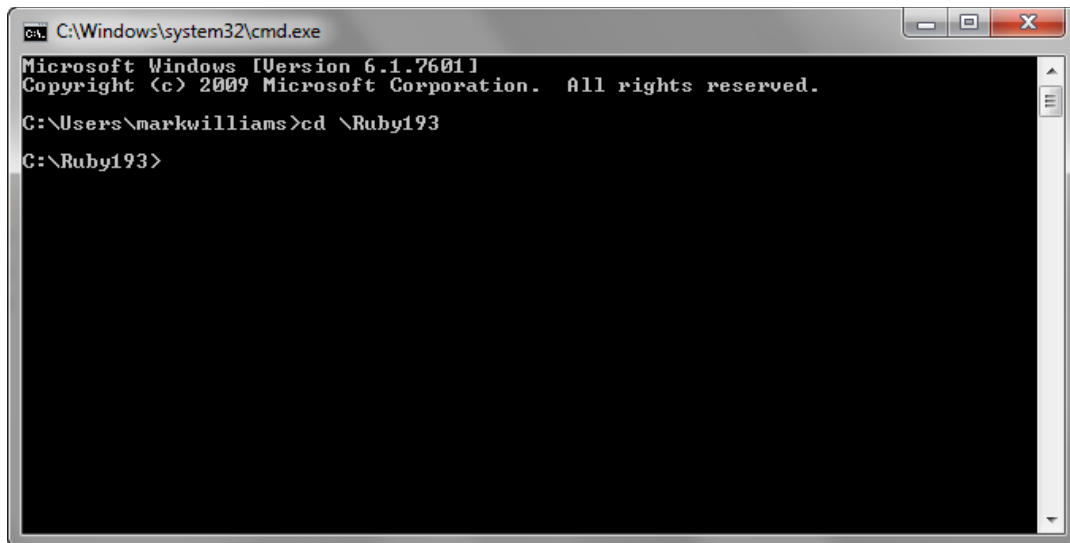


2. Open a command prompt window and go to the ruby directory that was created. In this example, Ruby was installed into C:\Ruby193:

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



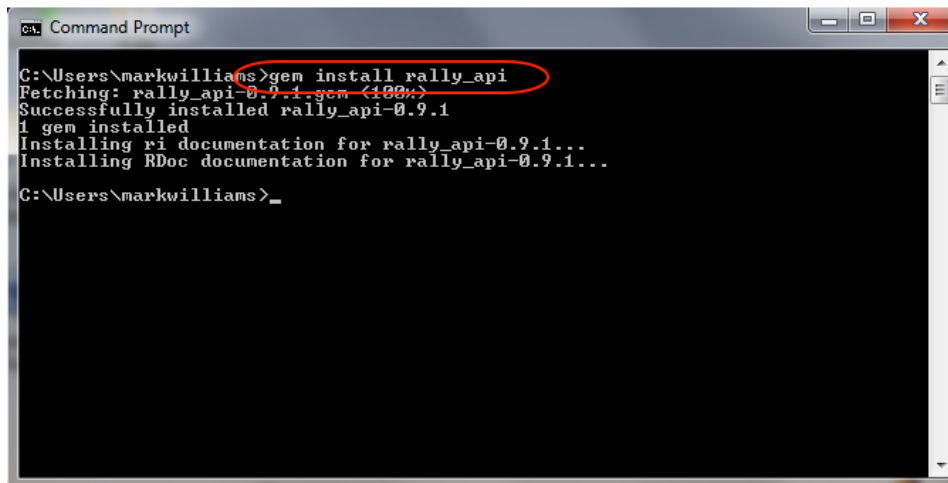
3. The Command prompt window appears. Navigate to where you installed Ruby:

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.

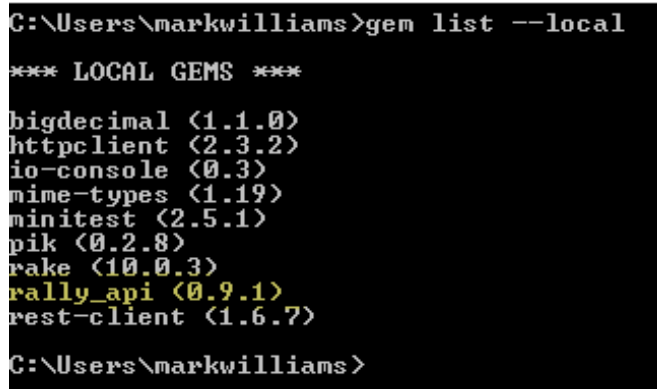
C:\Users\markwilliams>cd \Ruby193
C:\Ruby193>
```

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`. The output shows the gem being fetched, successfully installed, and documentation being installed. The command prompt ends with a prompt character.

```
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 `gem list --local` command. The output lists several installed gems and their versions, including `rally_api` at version 0.9.1.

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

*** LOCAL GEMS ***

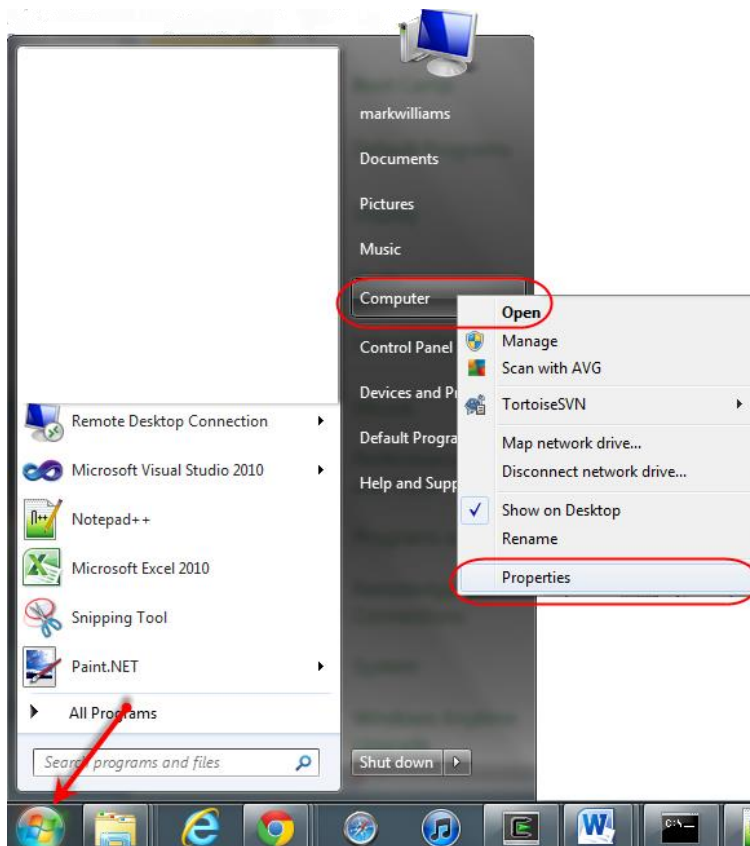
bigdecimal (1.1.0)
httpclient (2.3.2)
io-console (0.3)
mime-types (1.19)
minitest (2.5.1)
pik (0.2.8)
rake (10.0.3)
rally_api (0.9.1)
rest-client (1.6.7)

C:\Users\markwilliams>
```

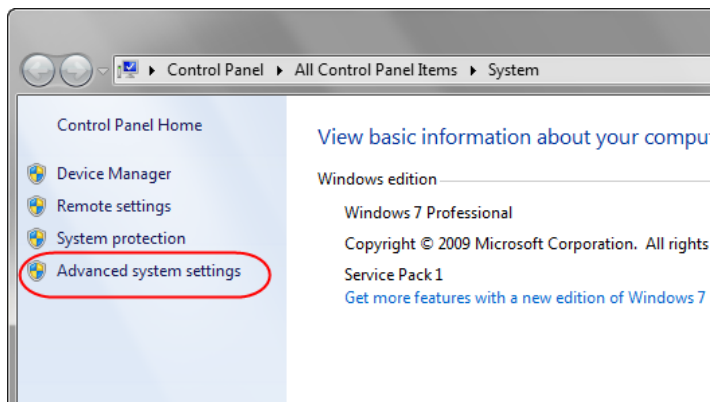
II. Configuring a Proxy Server

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:

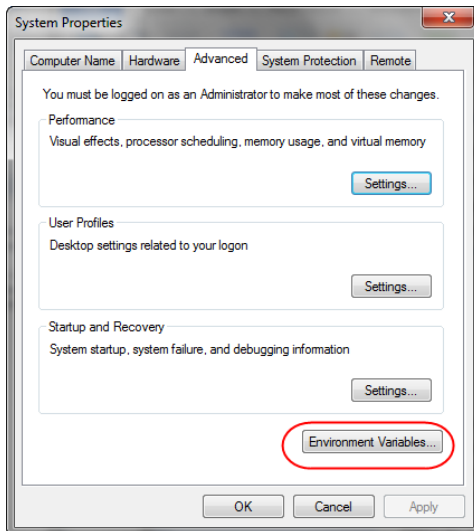
Start -> Computer (Right Click) -> Properties:



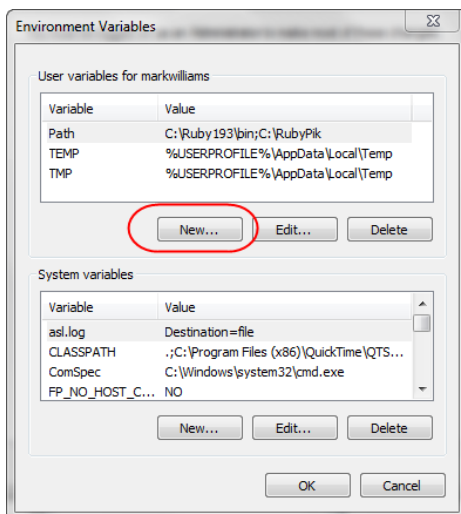
2. Advanced System Settings:



3. Environment Variables:



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



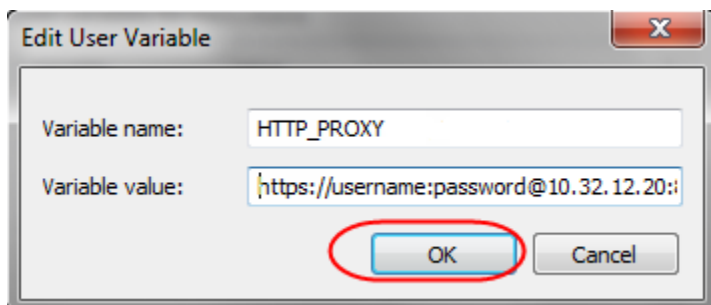
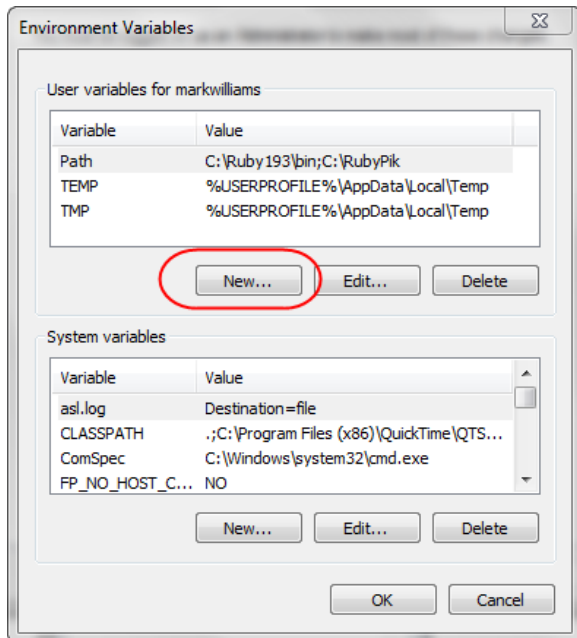
5. Create the following environment variables:

- 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:



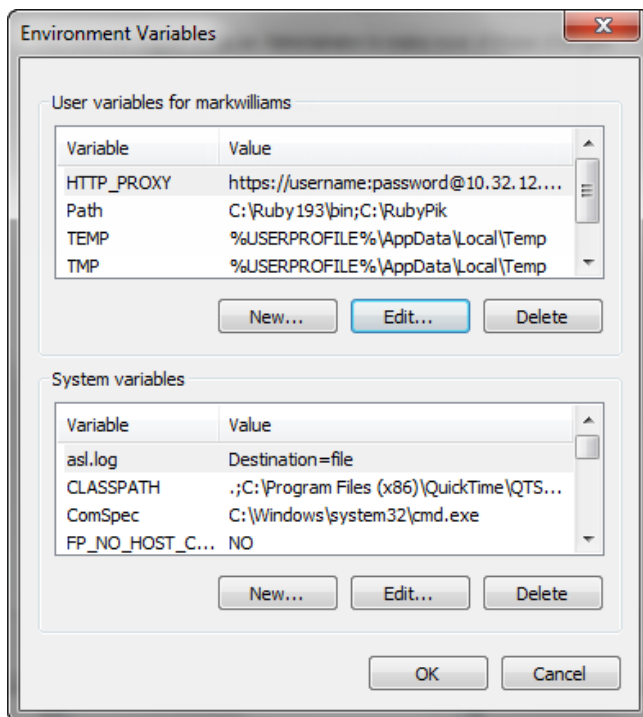
In this example you entered:

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: Simple Way to Load New Users into Rally

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

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

2. Alternatively, download the ZIP file:

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

3. 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         = "1.43"
```

4. Scripts used:

- simple_user_loader.rb

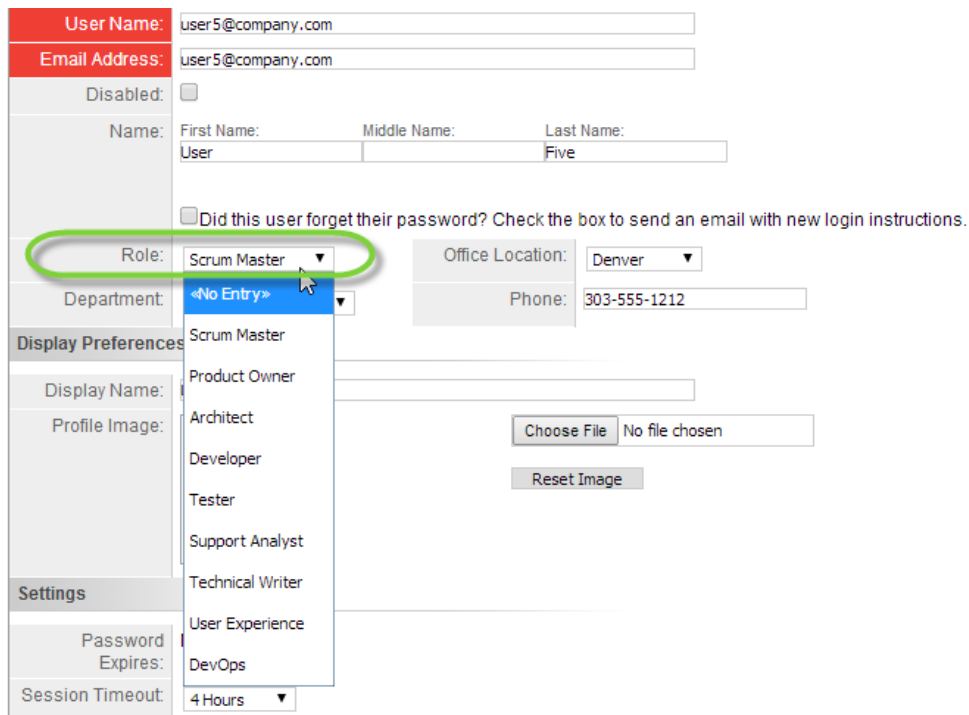
5. Prepare an eleven-column, *tab-delimited* text file containing a list of New Users you wish to Create/Assign Permissions to. There is a template New User file called `simple_user_loader_template.txt` to get you started. **Note:** The *only* required field in this file is the UserID. If you specify this field and nothing else, the `simple_user_loader.rb` will create a set of Users in your subscription with no attributes and no default permissions. The loader will still expect an input file with eleven columns, however, so make sure to keep the column headers intact when saving your input file.

	A	B	C	D	E	F	G	H	I	J	K
1	UserID	LastName	FirstName	DisplayName	DefaultPermissions	Role	OfficeLocation	Department	CostCenter	Phone	NetworkID
2	user5@company.com	Five	User	User Five	aragorn@middleearth.com	Scrum Master	Denver	R&D	R&D	303-555-1212	user5
3	user6@company.com	Six	User	User Six	boromir@middleearth.com	Developer	Boulder	Horizon3 Initiatives	R&D	303-555-1414	user8
4	user7@company.com	Seven	User	User Seven	None	DevOps	Denver	Operations	Operations	720-555-1414	user7
5	user8@company.com	Eight	User	User Eight	Editor						
6	user9@company.com	Nine	User	User Nine	Viewer	Support Analyst	Kirkland	Support	Operations	425-555-1212	user9

Note: Of the fields listed below, only the UserID is required. The remainder are optional. If you specify UserID only, the `simple_user_loader.rb` script will create the Users with no Default permissions, and no user attributes.

- UserID: user1@company.com
- *Optional:* LastName: One
- *Optional:* FirstName: User
- *Optional:* DisplayName: User One
- *Optional:* DefaultPermissions:
 - Editor
 - Viewer

- aragorn@midearth.com
- **Note:**
 - Specifying an *already-existing* Rally UserID in this column will result in a permissions profile for user1@company.com whose Workspace and Project Permissions and Team Memberships, are identical to those of the source user aragorn@midearth.com. You may use as many different source/template users as a providers of a permissions profile, as needed in this column.
 - Specifying Editor or Viewer in this column will result in a permissions profile for user1@company.com with Editor or Viewer Permissions, respectively, for all Projects in all Workspaces.
- **Optional: Role.** A valid Role string corresponding to one of the custom/optional Roles in your Subscription, as shown in the User Editor:



User Name: user5@company.com

Email Address: user5@company.com

Disabled: ☐

Name: First Name: User Middle Name: Last Name: Five

☐ Did this user forget their password? Check the box to send an email with new login instructions.

Role: Scrum Master (selected)

Department: «No Entry»

Office Location: Denver

Phone: 303-555-1212

Display Preferences

Display Name: Product Owner

Profile Image: Architect

Choose File No file chosen

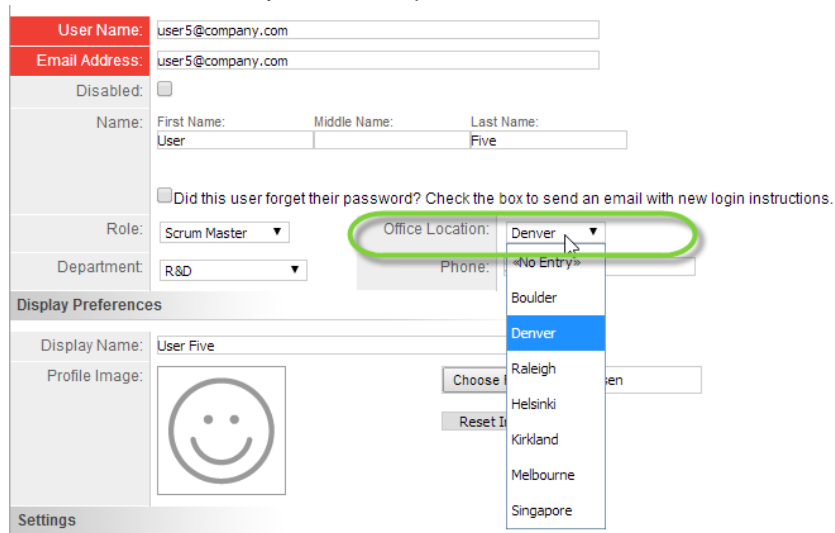
Reset Image

Settings

Password Expires: DevOps

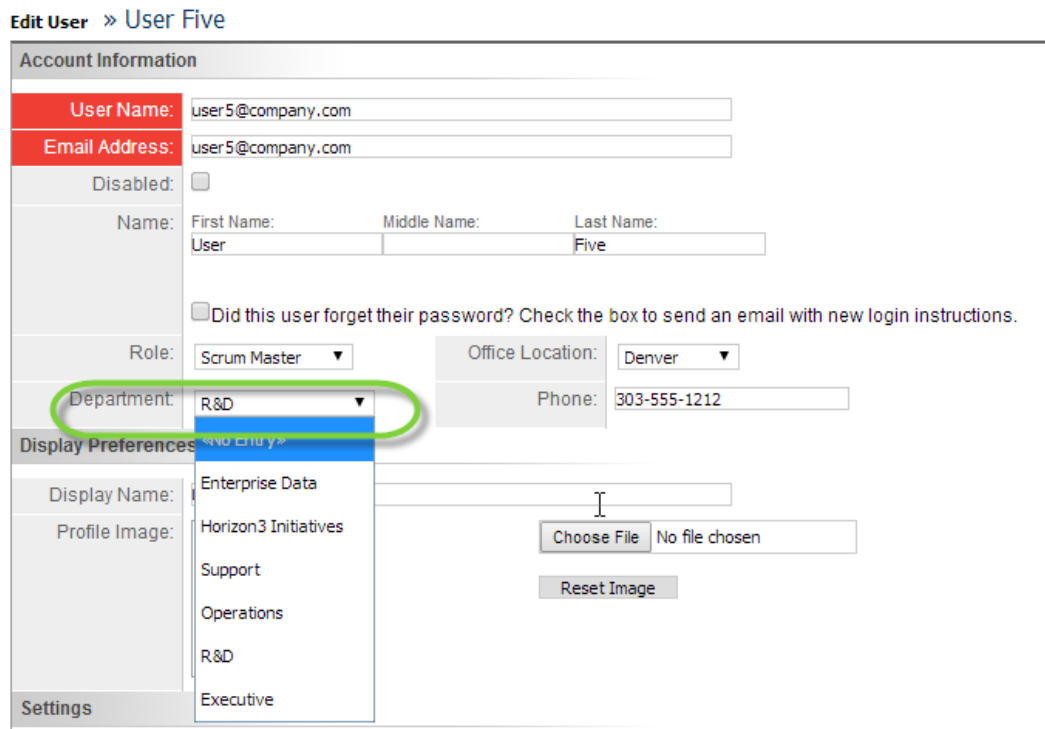
Session Timeout: 4 Hours

- *Optional:* OfficeLocation. A valid OfficeLocation string corresponding to one of the custom/optional OfficeLocations in your Subscription, as shown in the User Editor:



The screenshot shows the 'User Editor' form for 'User Five'. The 'Office Location' dropdown menu is open, displaying a list of locations: Denver, Boulder, Raleigh, Helsinki, Kirkland, Melbourne, and Singapore. The 'Denver' option is highlighted in blue. The form includes fields for User Name, Email Address, Name (First, Middle, Last), Role, Department, Display Name, Profile Image, and a checkbox for 'Did this user forget their password?'. The 'Office Location' field is currently set to 'Denver'.

- *Optional:* Department. A valid Department string corresponding to one of the custom/optional Departments in your Subscription, as shown in the User Editor:



The screenshot shows the 'User Editor' form for 'User Five'. The 'Department' dropdown menu is open, displaying a list of departments: Enterprise Data, Horizon3 Initiatives, Support, Operations, R&D, and Executive. The 'R&D' option is highlighted in blue. The form includes fields for User Name, Email Address, Name (First, Middle, Last), Role, Office Location, Department, Display Name, Profile Image, and a checkbox for 'Did this user forget their password?'. The 'Department' field is currently set to 'R&D'.

- *Optional: CostCenter.* A valid CostCenter string corresponding to one of the custom/optional CostCenters in your Subscription, as shown in the User Editor:



- *Optional: Phone.* User's phone number
- *Optional: NetworkID:* A NetworkID for the user. This is often the user's internal Directory-login, without the email address. For example: Network ID = user5 when UserName = [user5@company.com](#).

6. Save the file when you're done preparing your new user list with desired attributes.

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

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

```
$ ruby simple_user_loader.rb
I, [2014-03-02T16:55:12.854892 #5056] INFO -- : Connecting to https://rally1.rallydev.com/slm as
mdwilliams@rallydev.com...
I, [2014-03-02T16:55:12.855815 #5056] INFO -- : Instantiating User Helper...
I, [2014-03-02T16:55:12.855862 #5056] INFO -- : Caching workspaces and projects...
I, [2014-03-02T16:55:13.038523 #5056] INFO -- : Read and cached a total of 1394 projects from local
cache file.
I, [2014-03-02T16:55:13.075070 #5056] INFO -- : User user5@company.com does not yet exist. Creating...
I, [2014-03-02T16:55:13.406300 #5056] INFO -- : Created Rally user user5@company.com
I, [2014-03-02T16:55:13.538155 #5056] INFO -- : Source User: Strider has 8 permissions.
I, [2014-03-02T16:55:13.538257 #5056] INFO -- : user5@company.com Mark W Workspace - Permission set
to User
I, [2014-03-02T16:55:13.633817 #5056] INFO -- : user5@company.com Icefall - Permission set to Editor
I, [2014-03-02T16:55:13.749571 #5056] INFO -- : Source User: aragorn@midearth.com; Icefall; Yes
I, [2014-03-02T16:55:13.896564 #5056] INFO -- : user5@company.com Icefall - Team Membership set to
Yes
I, [2014-03-02T16:55:13.896679 #5056] INFO -- : user5@company.com Echo Ice - Permission set to Editor
I, [2014-03-02T16:55:14.017753 #5056] INFO -- : Source User: aragorn@midearth.com; Echo Ice; No
I, [2014-03-02T16:55:14.017860 #5056] INFO -- : user5@company.com Echo Ice - No creation of or
changes to Team Membership
I, [2014-03-02T16:55:14.017951 #5056] INFO -- : user5@company.com Arrete - Permission set to Editor
....
```

8. Review/spot check users in Rally to verify that the Permissions assigned in your bulk upload match source users / bulk assignment specifications! This can save a lot of clicking when creating new users.

IV. User Management Tool: A More Detailed/Customizable Method of User Creation with Workspace and Project Permissions

1. This method of creating new users allows you to adjust/customize User Permission attributes at a very-fine grained level, because it outputs/stages the permissions to a loader template file. You can then adjust this loader template file project-by-project, if desired, before loading the users/permissions into Rally.
2. Using your preferred Git client, clone the following GIT repository.

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

3. Alternatively, download the ZIP file:

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

4. 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    = "1.43"
```

5. Scripts used:

- user_permissions_template_generator.rb
- user_permissions_uploader.rb

6. Prepare a five-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:

	A	B	C	D	E
1	UserID	LastName	FirstName	DisplayName	DefaultPermissions
2	user1@company.com	One	User	User One	aragorn@midearth.com
3	user2@company.com	Two	User	User Two	Editor
4	user3@company.com	Three	User	User Three	Viewer
5	user4@company.com	Four	User	User Four	boromir@midearth.com

- UserName: user1@company.com
- LastName: One
- FirstName: User
- DisplayName: User One
- DefaultPermissions:
 - Editor
 - Viewer
 - Admin

- aragorn@midearth.com
- *Note:*
 - Specifying an *already-existing* Rally UserID in this column will result in a permissions profile for user1@company.com whose Workspace and Project Permissions and Team Memberships, are identical to those of the source user aragorn@midearth.com. You may use as many different source/template users as a providers of a permissions profile, as needed in this column.
 - Specifying Editor or Viewer in this column will result in a permissions profile for user1@company.com with Editor or Viewer Permissions, respectively, for all Projects in all Workspaces.

7. 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.

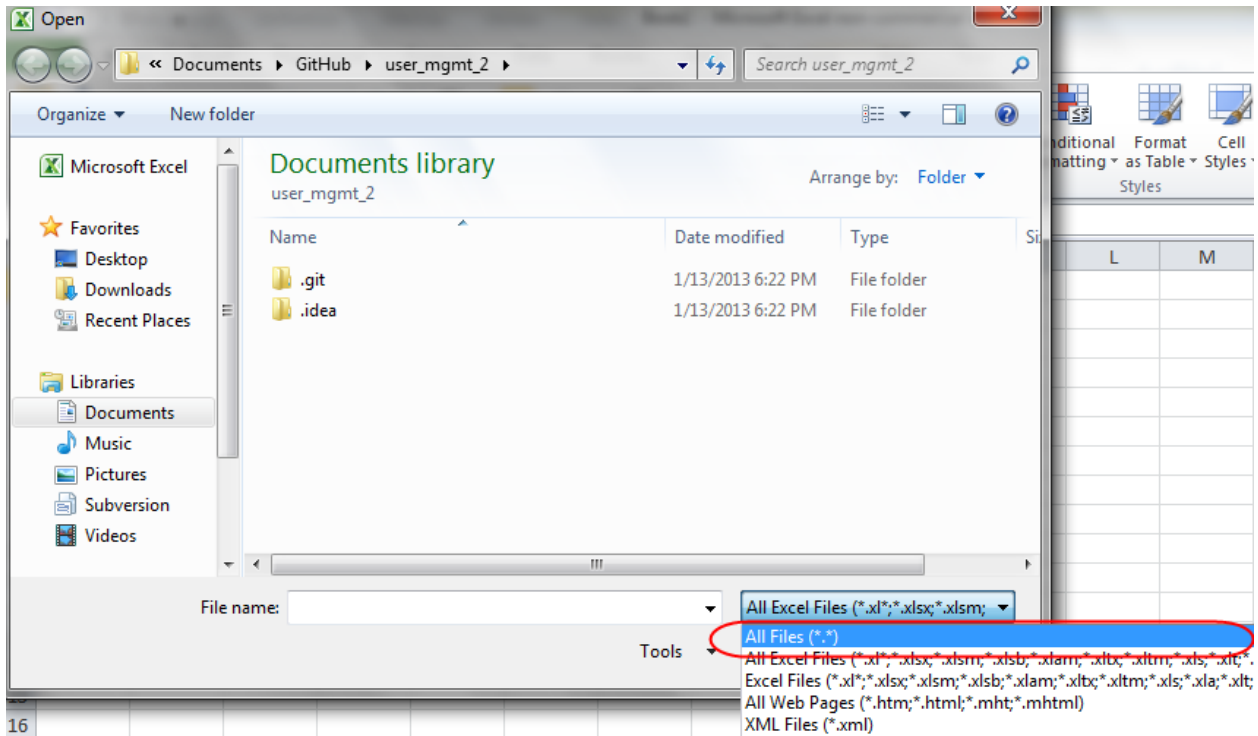
8. Run the script.

```
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.
```

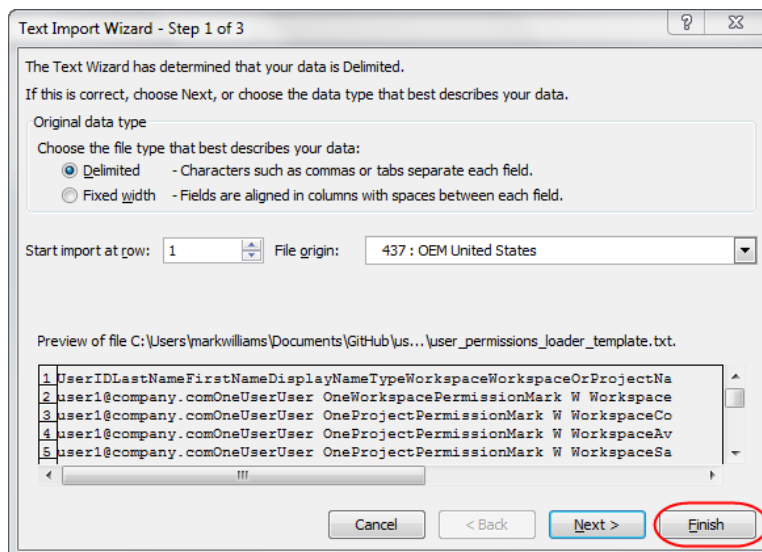
9. Open the `user_permissions_loader_template.txt` in Excel. Since it is a *tab-delimited text file*, you'll need to start Excel first.

10. File -> Open and navigate to and open `user_permissions_loader_template.txt`

11. 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".



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



13. 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									
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 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	TFSProject	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.

14. 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:

File Home Insert Page Layout Formulas Data Review View Developer Rally Team									
From Access From Web From Text From Other Sources Existing Connections Refresh All Edit Links Connections Sort & Filter Filter Clear Reapply Advanced Text to Columns Remove Duplicates Data Validation Consolidate What-If Analysis Group Ungroup Summary Outline									
A1 UserID									
	A	B	C	D	E	F	G	H	I
1	UserID	LastName	FirstName	DisplayName	Type	Workspace	WorkspaceOrProjectName	Role	TeamMember
2	user1@company.com	One	User	User One	WorkspacePermission	Mark W Workspace	Mark W Workspace	User	N/A
3	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Couloir Chute Mapping: Heli-Ski	Editor	Yes
4	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Avalanche Hazard Mapping	Editor	Yes
5	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Sandbox	Editor	Yes
6	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 1	Editor	Yes
7	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 2	Editor	Yes
8	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Open-Source Online Mapping Server	Editor	Yes
9	user1@company.com	One	User	User One	ProjectPermission	Mark W Workspace	Child Project 3	Editor	Yes

Rally Team										
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

- **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
 - Admin
 - 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.

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

16. 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.

File Home Insert Page Layout Formulas Data Review View Developer Rally Team											
Calibri 11 A A											
B I U Font Alignment Number Styles Cells Editing											
A1 UserID											
	A	B	C	D	E	F	G	H	I	J	K
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	TFSPProject	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	TFSPProject	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	TFSPProject	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.

17. 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

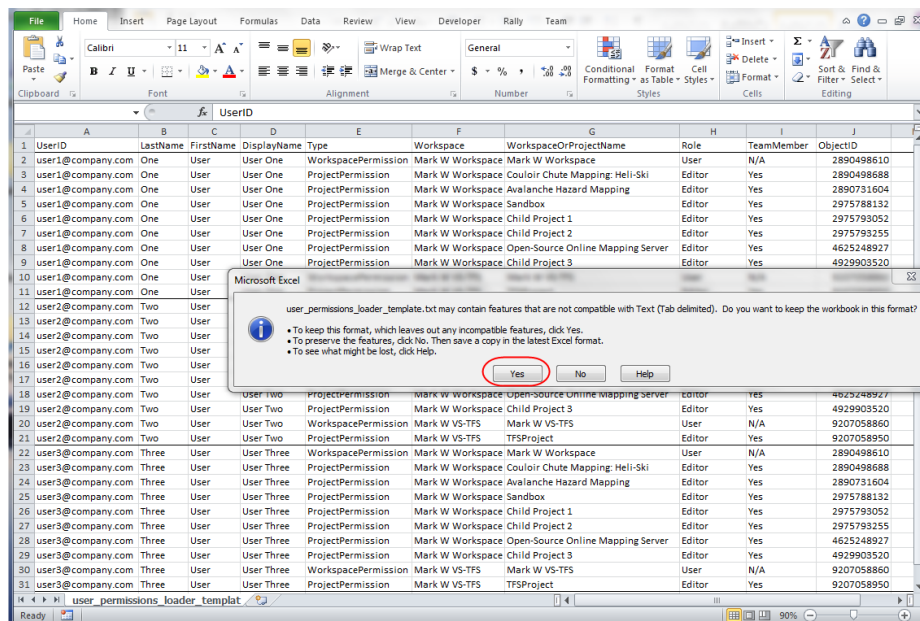
Important Usage Notes:

- **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
 - Admin
 - 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:

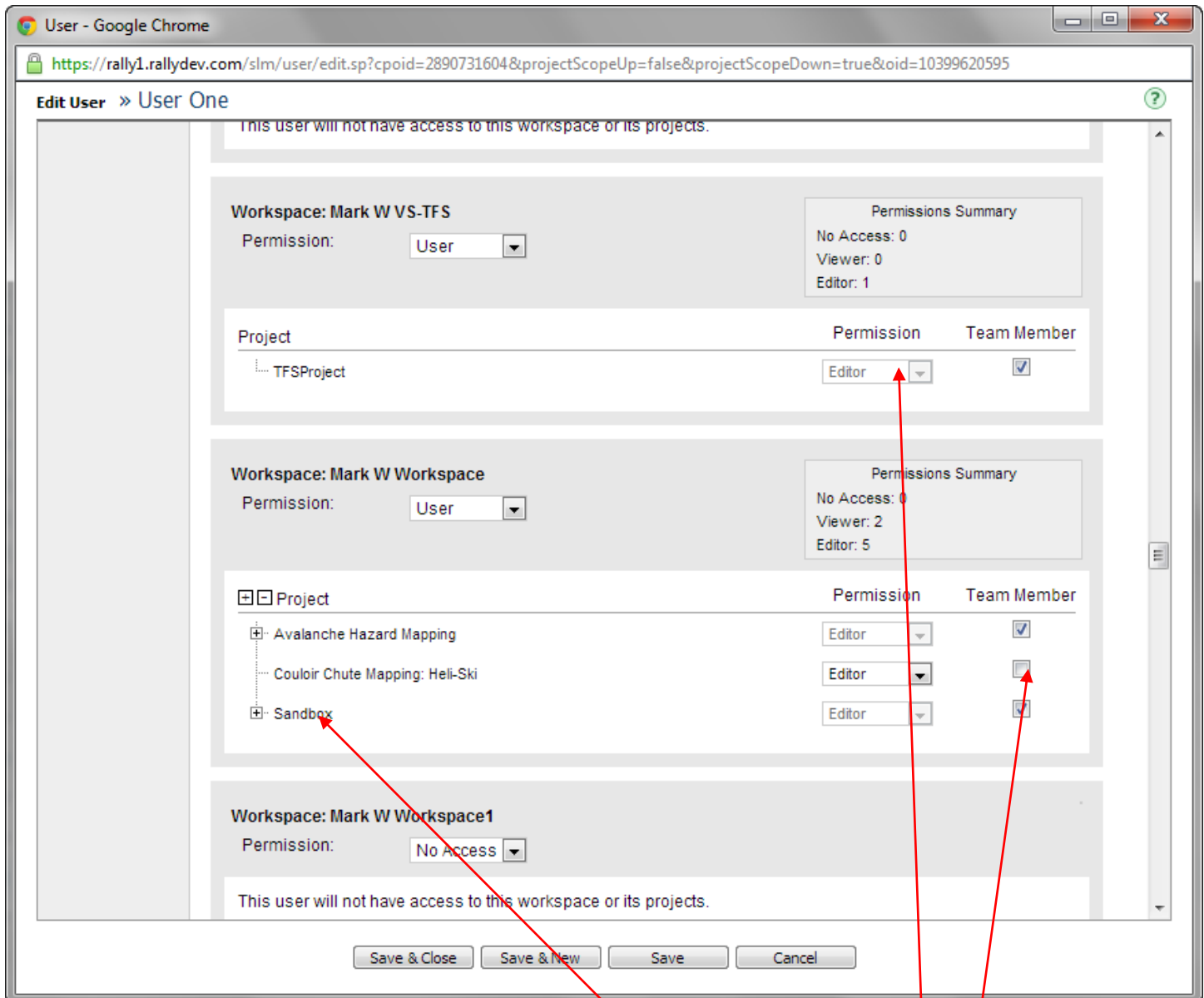


Important: Make sure to use Tab-Delimited text, not CSV, not XLSX or XLS. The loader script expects and processes only Tab-Delimited files.

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.

13. Upgrade-Only Mode

Scripts Using this Parameter:

user_permissions_loader.rb

Description:

When running with `$upgrade_only_mode == true`, the script will check existing permissions before applying a change. It will then apply the change `_only_` if the proposed permissions are an upgrade in comparison to existing permissions.

Example one:

Existing Permissions: Viewer
Proposed Permissions: Editor
Permission change occurs

Example two:

Existing Permissions: Editor
Proposed Permissions: Viewer
NO Permission change occurs

This is convenient when seeking to grant Viewer level access to all users, without downgrading existing editors, as an example

Valid Settings:

`$upgrade_only_mode = true`
`$upgrade_only_mode = false`
`$upgrade_only_mode` = false

V. 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.

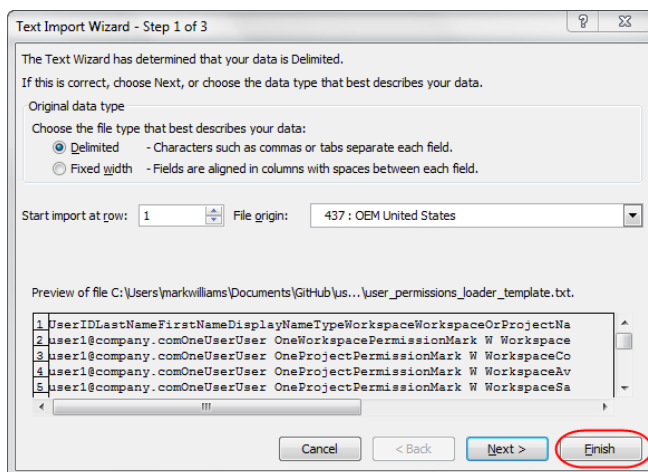
3. Run the script:

```
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        = "1.43"

# 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

VI. User Management Tool: Detailed Updates To User Permissions

1. Scripts used:

- user_permissions_summary.rb
- user_permissions_uploader.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.

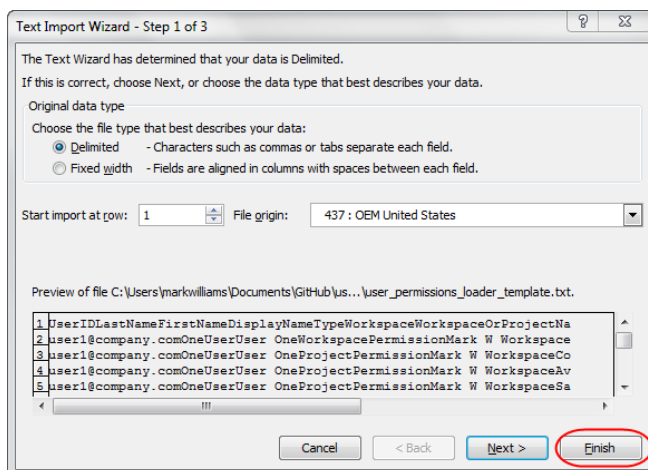
3. Run the script:

```
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 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.

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

9. 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

10. 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.

11. 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.

12. 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_loaders.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

```

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

User - Google Chrome

https://rally1.rallydev.com/slm/user/edit.sp?cpoid=2890731604&projectScopeUp=false&projectScopeDown=true&oid=10399620595

Edit User » User One

Project: TFSPProject Permission: Editor Team Member: ☒

Workspace: Mark W Workspace
Permission: User

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

Project

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

VII. User Management Tool: Synchronizing Permissions from User to User

1. Scripts Used:

user_permissions_syncer.rb

2. The user permissions syncer can be used to copy the permissions and team memberships from one set of users to another. This can be useful if you have a set of "template" users whose permissions and team memberships can be used as a Permission model or grouping source for other Rally Users.
3. Prepare a user mapping CSV file in Excel or a text editor. This is a simple two column CSV that contains a list of target user ID's, and the source User from whom the permissions profile is being copied. Both source and target user must already exist in Rally.
4. The input file format should match the following:

```
TargetUserID, SourceUserID
user1@company.com, template_user_A@company.com
user2@company.com, template_user_B@company.com
user3@company.com, template_user_B@company.com
user4@company.com, template_user_A@company.com
```

5. With a file of the above format, user1@company.com's Project Permissions *and* Team Memberships will be mirrored to the Project Permissions of template_user_A@company.com, user2@company.com would be mirrored from template_user_B@company.com, and so on.

Important! Synchronization means that the script will *remove* existing Permissions from the Target User if they are not present on the Source User! Be cautious when using this script!

Note that only Project Permission synchronization is supported, Workspace Permissions are not mirrored.

The default is for Team Memberships to be synchronized also. If you wish *not* to mirror Team Memberships, then set the following flag in the my_vars.rb settings file:

```
$sync_team_memberships = false
```

Run the script:

```
$ ruby user_permissions_syncer.rb user_sync_template.txt
```

```
I, [2013-11-02T19:21:47.303157 #3028] INFO -- : Caching User:
template_user1@company.com
I, [2013-11-02T19:21:47.443557 #3028] INFO -- : Caching User: user1@company.com
I, [2013-11-02T19:21:47.443557 #3028] INFO -- : Syncing permissions from:
template_user1@company.com to user1@company.com.
I, [2013-11-02T19:21:47.443557 #3028] INFO -- : Creating Editor permission on
Philips from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:48.894360 #3028] INFO -- : Creating Editor permission on
Horses from template_user1@company.com to: user1@company.com.
```


I, [2013-11-02T19:21:49.299960 #3028] INFO -- : Creating Viewer permission on Child Project 2 from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:49.487161 #3028] INFO -- : Creating Editor permission on Lions from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:49.674361 #3028] INFO -- : Creating Editor permission on Foxes from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:52.794366 #3028] INFO -- : Removing Editor permission to Child Project 3 from user1@company.com since it is not present on source: template_user1@company.com.
I, [2013-11-02T19:21:53.012767 #3028] INFO -- : 5 Permissions Created; 0 Permissions Updated; 1 Permissions Removed.
I, [2013-11-02T19:21:53.262367 #3028] INFO -- : Refreshed User: user1@company.com
I, [2013-11-02T19:21:53.262367 #3028] INFO -- : Syncing team memberships from: template_user1@company.com to user1@company.com.
I, [2013-11-02T19:21:53.262367 #3028] INFO -- : Updating TeamMembership on Couloir Chute Mapping: Heli-Ski from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:53.465168 #3028] INFO -- : user1@company.com Couloir Chute Mapping: Heli-Ski - Team Membership set to Yes
I, [2013-11-02T19:21:53.465168 #3028] INFO -- : Updating TeamMembership on Avalanche Hazard Mapping from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:53.714768 #3028] INFO -- : user1@company.com Avalanche Hazard Mapping - Team Membership set to Yes
I, [2013-11-02T19:21:53.714768 #3028] INFO -- : Updating TeamMembership on Open-Source Online Mapping Server from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:53.979968 #3028] INFO -- : user1@company.com Open-Source Online Mapping Server - Team Membership set to Yes
I, [2013-11-02T19:21:53.979968 #3028] INFO -- : Updating TeamMembership on Upper from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:54.245169 #3028] INFO -- : user1@company.com Upper - Team Membership set to Yes
I, [2013-11-02T19:21:54.245169 #3028] INFO -- : Updating TeamMembership on Lower from template_user1@company.com to: user1@company.com.
I, [2013-11-02T19:21:54.447969 #3028] INFO -- : user1@company.com Lower - Team Membership set to Yes
I, [2013-11-02T19:21:54.447969 #3028] INFO -- : Team Memberships Added: 5; Team Memberships Removed: 0

VIII. 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.
```

IX. 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:
=====
```

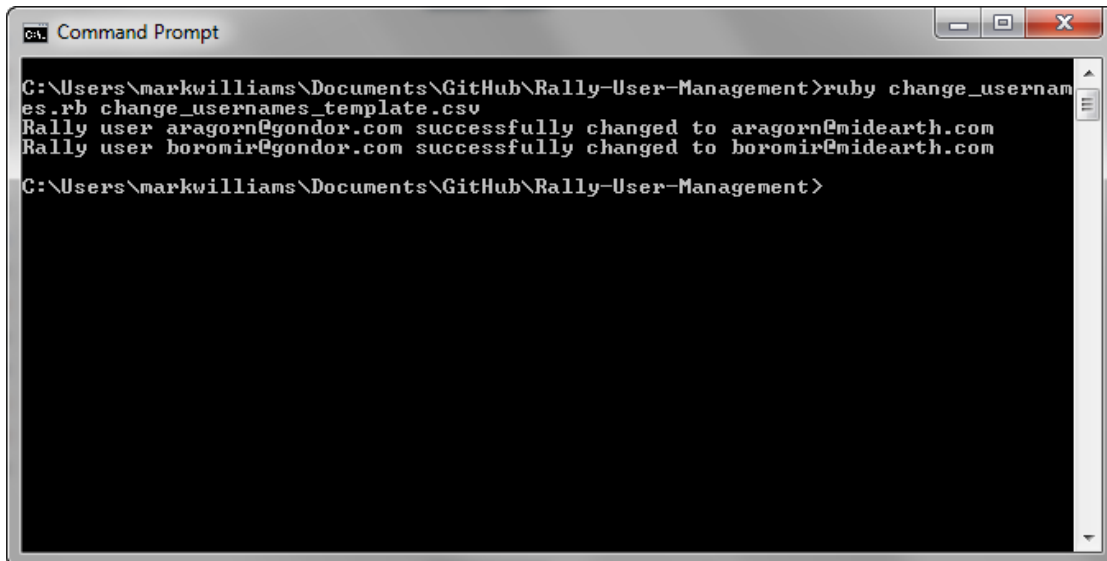
```
$my_username          = 'user@company.com'
$my_password          = 'topsecret'
$my_base_url          = "https://rally1.rallydev.com/slm"

#API Version
$wsapi_version        = "1.43"

# 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.

X. User Management Tool: Update Extended User Attributes

1. 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    = "1.43"
```

2. Scripts used:

- update_user_attributes.rb

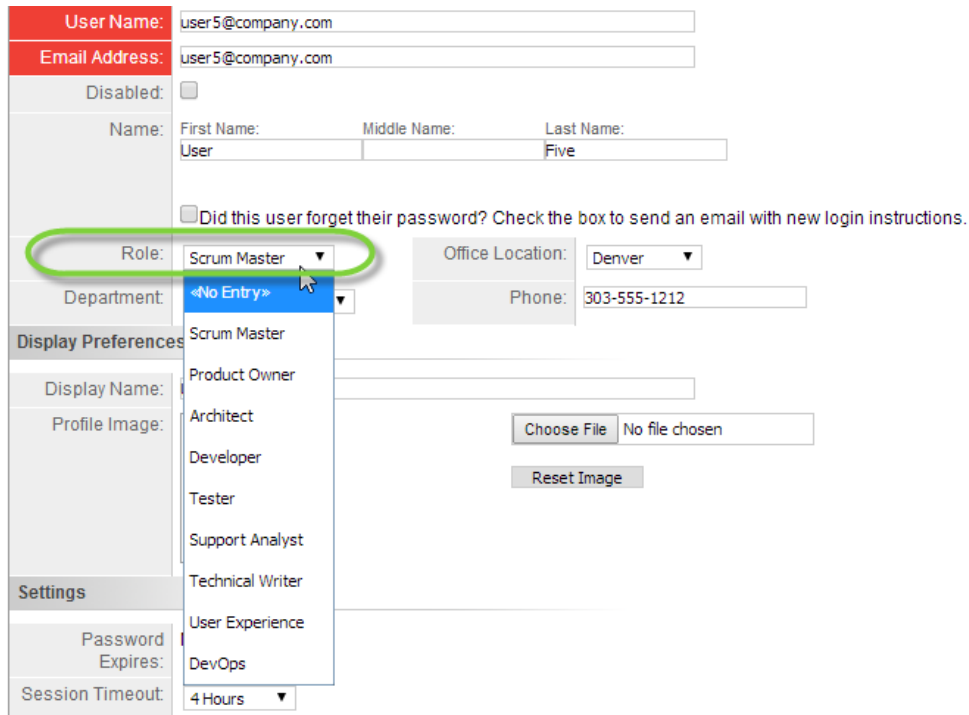
3. Prepare an thirteen-column, *tab-delimited* text file containing a list of users and attributes you wish to update. There is a template New User file called `update_user_attributes_template.txt` to get you started. **Note:** The *only* required field in this file is the UserID. The updater script will only update those columns for which it finds values.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	UserID	LastName	FirstName	DisplayName	Role	OfficeLocation	Department	CostCenter	Phone	NetworkID	DefaultWorkspaceName	DefaultProjectName	TimeZone
2	user5@company.com	Five	User	User Five	Scrum Master	Boulder	Operations	Operations	303-555-1212	fred	Mark W Workspace	Avalanche Hazard Maj	America/Denver
3	user6@company.com	Six	User	User Six	Developer	Boulder	Operations	Operations	303-555-1414	wilma	Mark W Workspace	Avalanche Hazard Maj	Default
4	user7@company.com	Seven	User	User Seven	DevOps	Kirkland	Horizon3 Initiatives	R&D	425-555-1414	betty	Curmudgeon	Deep Space	America/Los_Angeles

Note: Of the fields listed below, only the UserID is required. The remainder are optional. If you specify UserID only, the simple_user_loader.rb script will create the Users with no Default permissions, and no user attributes.

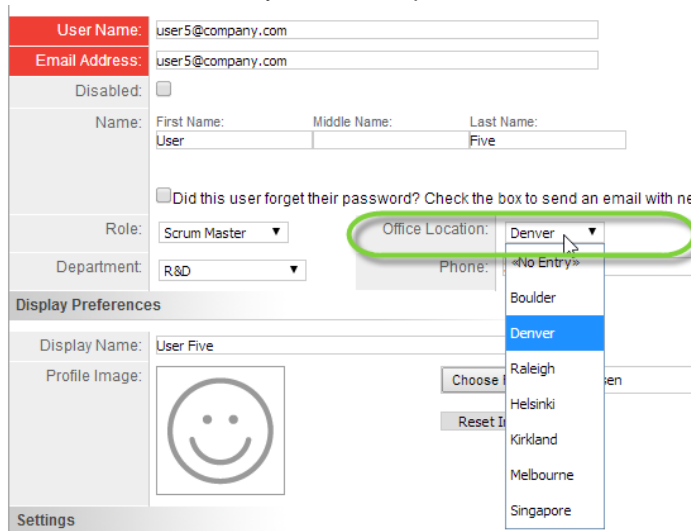
- UserID: user1@company.com
- *Optional:* LastName: One
- *Optional:* FirstName: User
- *Optional:* DisplayName: User One

- *Optional: Role.* A valid Role string corresponding to one of the custom/optional Roles in your Subscription, as shown in the User Editor:



The screenshot shows the 'User Editor' form. The 'Role' dropdown menu is open, displaying a list of roles: Scrum Master, Product Owner, Architect, Developer, Tester, Support Analyst, Technical Writer, User Experience, and DevOps. The 'Scrum Master' role is highlighted. The form also includes fields for User Name, Email Address, Name (First, Middle, Last), Office Location, Department, Phone, Display Name, Profile Image, Password Expires, and Session Timeout.

- *Optional: OfficeLocation.* A valid OfficeLocation string corresponding to one of the custom/optional OfficeLocations in your Subscription, as shown in the User Editor:



The screenshot shows the 'User Editor' form. The 'Office Location' dropdown menu is open, displaying a list of locations: Denver, Boulder, Raleigh, Helsinki, Kirkland, Melbourne, and Singapore. The 'Denver' location is highlighted. The form also includes fields for User Name, Email Address, Name (First, Middle, Last), Role, Department, Phone, Display Name, Profile Image, Password Expires, and Session Timeout.

- *Optional:* Department. A valid Department string corresponding to one of the custom/optional Departments in your Subscription, as shown in the User Editor:

Edit User » User Five

Account Information

User Name:

Email Address:

Disabled: ☐

Name: First Name: Middle Name: Last Name:

☐ Did this user forget their password? Check the box to send an email with new login instructions.

Role: Office Location:

Department: Phone:

Display Preferences

Display Name:

Profile Image:

Settings

«No Entry»

Enterprise Data

Horizon3 Initiatives

Support

Operations

R&D

Executive

- *Optional:* CostCenter. A valid CostCenter string corresponding to one of the custom/optional CostCenters in your Subscription, as shown in the User Editor:

Administrative Fields

Network ID:

Cost Center:

Instant Messenger

Accounts:

Operations

R&D

Executive

accounts to display.

User Name	Options	Rank

- *Optional:* Phone. User's phone number
- *Optional:* NetworkID: A NetworkID for the user. This is often the user's internal Directory-login, without the email address. For example: Network ID = user5 when UserName = [user5@company.com](#).
- *Optional:* DefaultWorkspaceName. The Default Workspace for the User. The User must have existing Permissions within the specified Default Workspace
- *Optional:* DefaultProjectName. The Default Project for the User. The User must have existing Permissions within the specified Default Project. **Warning!!** Because Rally allows duplicate Project names, if there is more than one Project with the specified name, the scripts will attempt to utilize the first one found.

- **Optional:** TimeZone. The TimeZone for the User's Profile. If blank, the User's TimeZone will be set to None, which causes the User Profile to use the Workspace Timezone as its Default.

4. Save the file when you're done preparing your new user list with desired attributes.

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

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

```
$ ruby update_user_attributes.rb
I, [2014-03-02T17:45:01.638925 #12176] INFO -- : Connecting to https://rally1.rallydev.com/slm as
mdwilliams@rallydev.com...
I, [2014-03-02T17:45:01.639759 #12176] INFO -- : Instantiating User Helper...
I, [2014-03-02T17:45:01.639804 #12176] INFO -- : Caching workspaces and projects...
I, [2014-03-02T17:45:01.767899 #12176] INFO -- : Read and cached a total of 146 workspaces from local
cache file.
I, [2014-03-02T17:45:01.767926 #12176] INFO -- : Started reading project cache from
/cygdrive/c/Users/markwilliams/Documents/GitHub/Rally-User-Management-
markwilliams970/_cached_projects.txt
I, [2014-03-02T20:43:21.360419 #12984] INFO -- : Completed reading project cache from
/cygdrive/c/Users/markwilliams/Documents/GitHub/Rally-User-Management-
markwilliams970/_cached_projects.txt
I, [2014-03-02T20:43:21.360440 #12984] INFO -- : Read and cached a total of 1394 projects from local
cache file.
I, [2014-03-02T20:43:21.458276 #12984] INFO -- : Caching User: user5@company.com
I, [2014-03-02T20:43:21.572881 #12984] INFO -- : Updated Rally user user5@company.com
I, [2014-03-02T20:43:21.750811 #12984] INFO -- : Refreshed User: user5@company.com
I, [2014-03-02T20:43:21.750859 #12984] INFO -- : Updated User.
I, [2014-03-02T20:43:21.898048 #12984] INFO -- : Updated user5@company.com with Default Workspace: Mark
W Workspace / Default Project: Avalanche Hazard Mapping
I, [2014-03-02T20:43:21.994582 #12984] INFO -- : Update user5@company.com with TimeZone: America/Denver
I, [2014-03-02T20:43:22.108747 #12984] INFO -- : Caching User: user6@company.com
I, [2014-03-02T20:43:22.229441 #12984] INFO -- : Updated Rally user user6@company.com
I, [2014-03-02T20:43:22.421688 #12984] INFO -- : Refreshed User: user6@company.com
I, [2014-03-02T20:43:22.421738 #12984] INFO -- : Updated User.
I, [2014-03-02T20:43:22.608201 #12984] INFO -- : Updated user6@company.com with Default Workspace: Mark
W Workspace / Default Project: Avalanche Hazard Mapping
I, [2014-03-02T20:43:22.706305 #12984] INFO -- : Update user6@company.com with TimeZone:
I, [2014-03-02T20:43:23.083111 #12984] INFO -- : Caching User: user7@company.com
I, [2014-03-02T20:43:23.288776 #12984] INFO -- : Updated Rally user user7@company.com
I, [2014-03-02T20:43:23.978541 #12984] INFO -- : Refreshed User: user7@company.com
I, [2014-03-02T20:43:23.978608 #12984] INFO -- : Updated User.
I, [2014-03-02T20:43:24.378144 #12984] INFO -- : Updated user7@company.com with Default Workspace:
Curmudgeon / Default Project: Deep Space
I, [2014-03-02T20:43:24.464049 #12984] INFO -- : Update user7@company.com with TimeZone:
America/Los_Angeles
```

6. Review/spot check users in Rally to verify that the attributes assigned in your bulk upload.

XI. 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.