# 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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### 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:



1. Open a command prompt window and go to the ruby directory that was created. In this example, Ruby was installed into C:\Ruby193:
   1. Click on your “Start” button, then enter cmd into the search dialog and hit Enter.



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



1. Install the rally\_api gem. This will also install its dependent gems. ***Requires rally\_api 0.9.1 or higher:*** gem install rally\_api.



1. When finished, you can verify all RubyGems installed by typing “**gem list –l”:**

### 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:



1. Advanced System Settings:



1. Environment Variables:  
     
   
2. Use the New button to create a new environment variable:



1. 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/>

1. 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.

1. Completed Environment Variable Entry:



1. 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.

### Important Note about Default Permissions For Users created via Rally Webservices API

New users are always created with one default WorkspacePermission and one default ProjectPermission, per the following rules

* The newly created user will have Workspace **User** and Project **Viewer** permissions according to the script user's default workspace and project.
* If the User running the script has no default workspace or project set, the newly created user will receive Workspace **User** and Project **Viewer** permissions within the first open project as chosen alphabetically. The workspace associated with that project will be chosen as the current default workspace.

### 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'

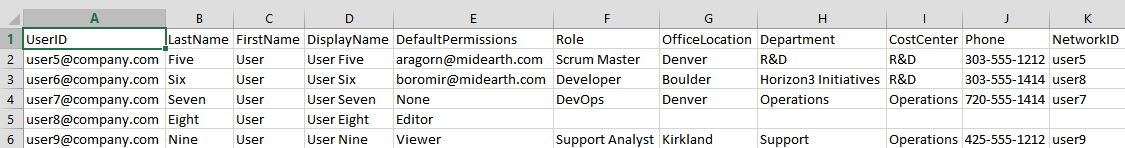
$my\_password = 'topsecret'

$my\_base\_url = "https://rally1.rallydev.com/slm"

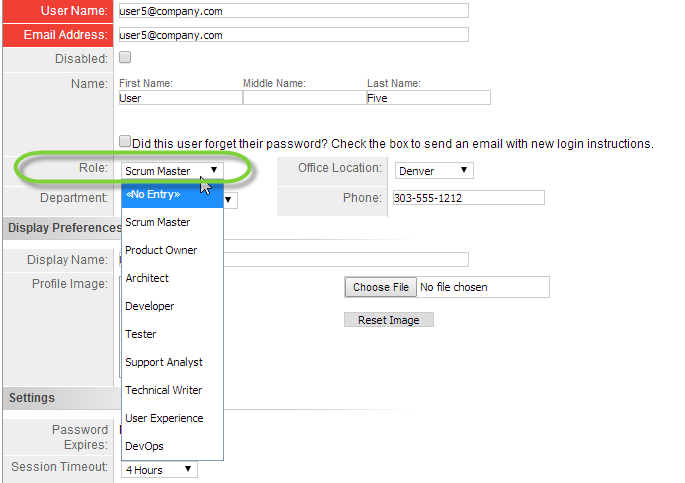
#API Version

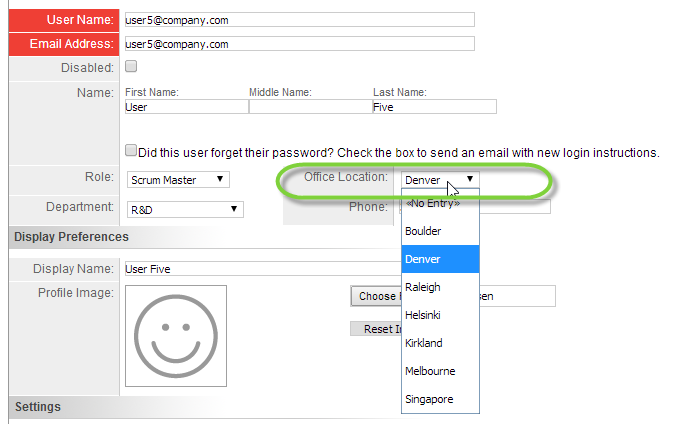
$wsapi\_version = "1.43"

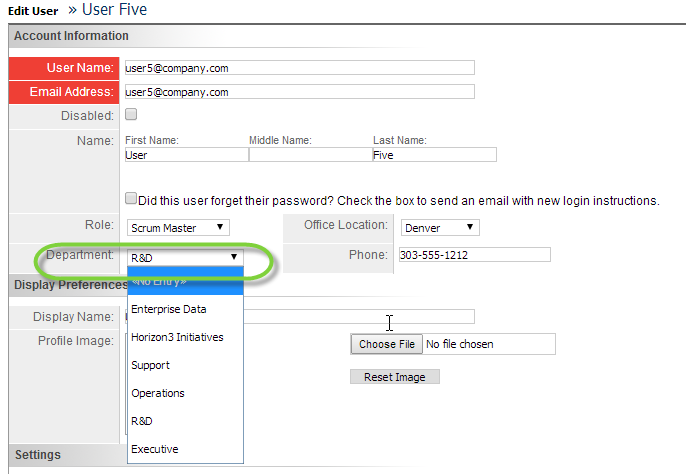
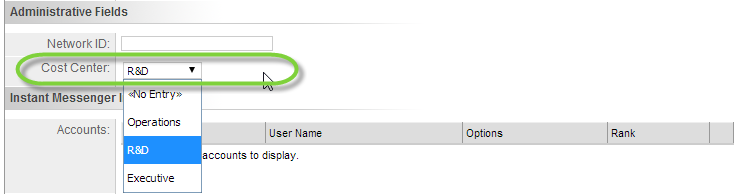
1. Scripts used:   
   * simple\_user\_loader.rb
2. Prepare an eleven-column, *tab-delimited* text file containing a list of New Users you wish to Create/Assign Permissions to. There is a template New User file called simple\_user\_loader\_template.txt to get you started. ***Note:*** The *only* required 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.



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



* *Optional:* Department. A valid Department string corresponding to one of the custom/optional Departments in your Subscription, as shown in the User Editor:  
    
  
* *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](mailto:user5@company.com).

1. 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.
2. 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

….

1. Review/spot check users in Rally to verfiy 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.

### 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'

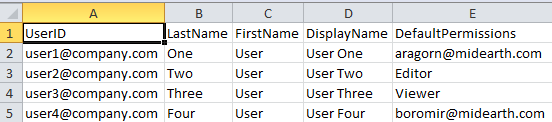
$my\_password = 'topsecret'

$my\_base\_url = "https://rally1.rallydev.com/slm"

#API Version

$wsapi\_version = "1.43"

1. Scripts used:   
   * user\_permissions\_template\_generator.rb
   * user\_permissions\_uploader.rb
2. 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:



* 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.

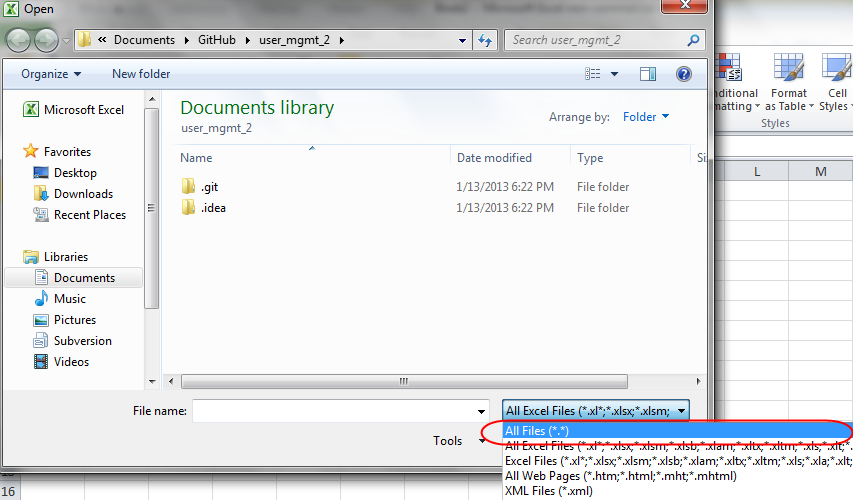
1. Find the user\_permissions\_template\_generator.rb script. This script will use the list of New Users to prepare a *tab-delimited text template file of UserPermissions* that is editable in Excel. The output file is called user\_permissions\_loader\_template.txt by default.
2. Run the script.

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.

1. Open the user\_permissions\_loader\_template.txt in Excel. Since it is a *tab-delimited text file*, you’ll need to start Excel first.
2. File -> Open and navigate to and open user\_permissions\_loader\_template.txt
3. 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”.  
     
   
4. This will start an import Wizard. You can just click the “Finish” button to accept all defaults and open the file:



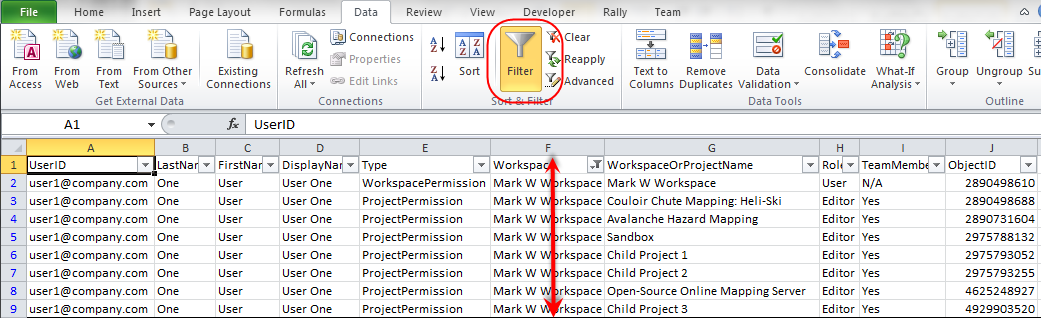
1. Here’s what the file should look like in Excel.

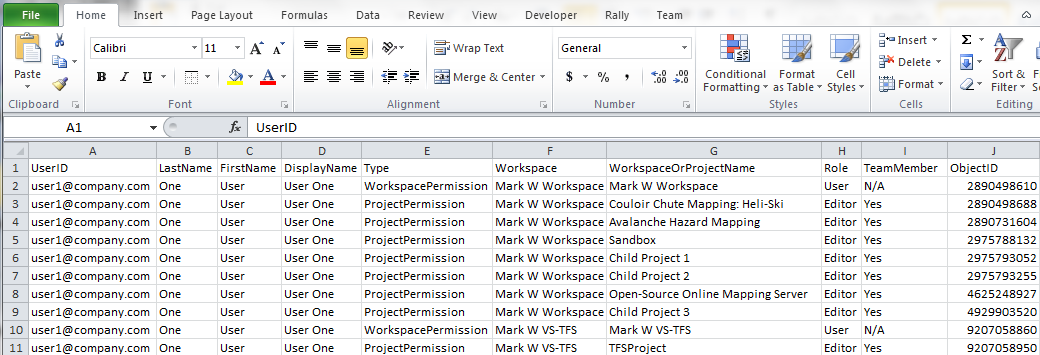


As a Template, this worksheet is intended to provide a Workspace/Project permissions framework from which to build your own worksheet of Permissions to assign when creating new users.

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

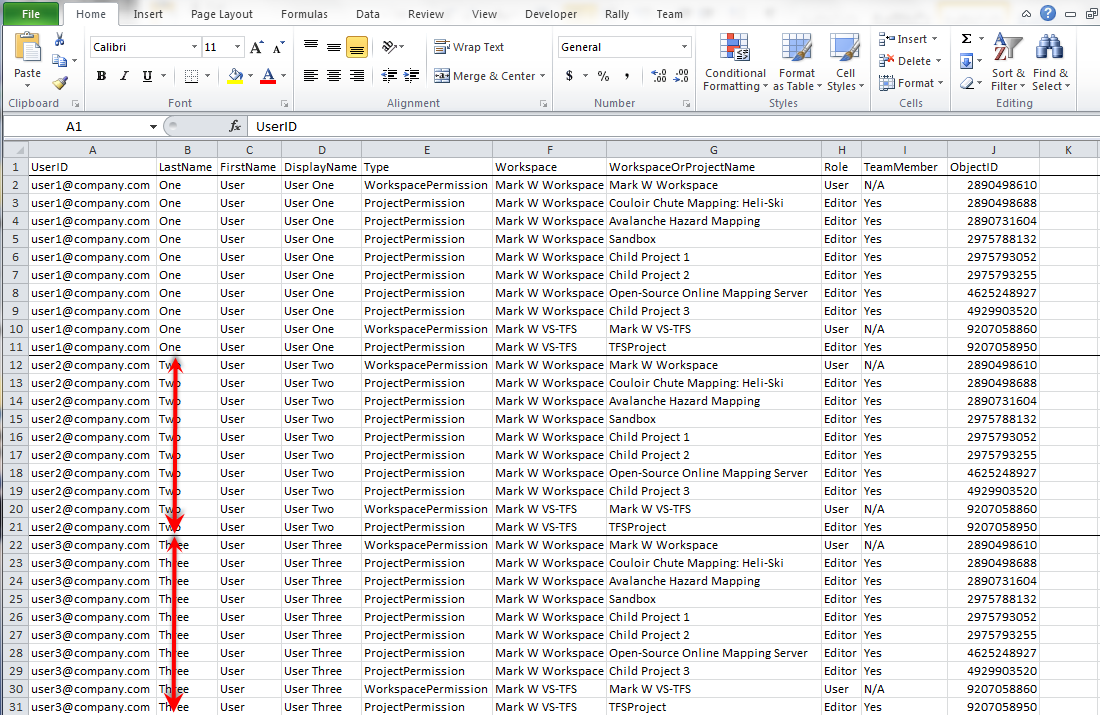
* **UserID:** This is the UserID / email address for the User you wish to create in Rally
* **LastName:** The new User’s Last Name
* **FirstName:** The new User’s First Name
* **DisplayName:** The new User’s Display Name within Rally
* **Type:** This field has two possible values:
  + WorkspacePermission: 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 WorkspacePermssions 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:





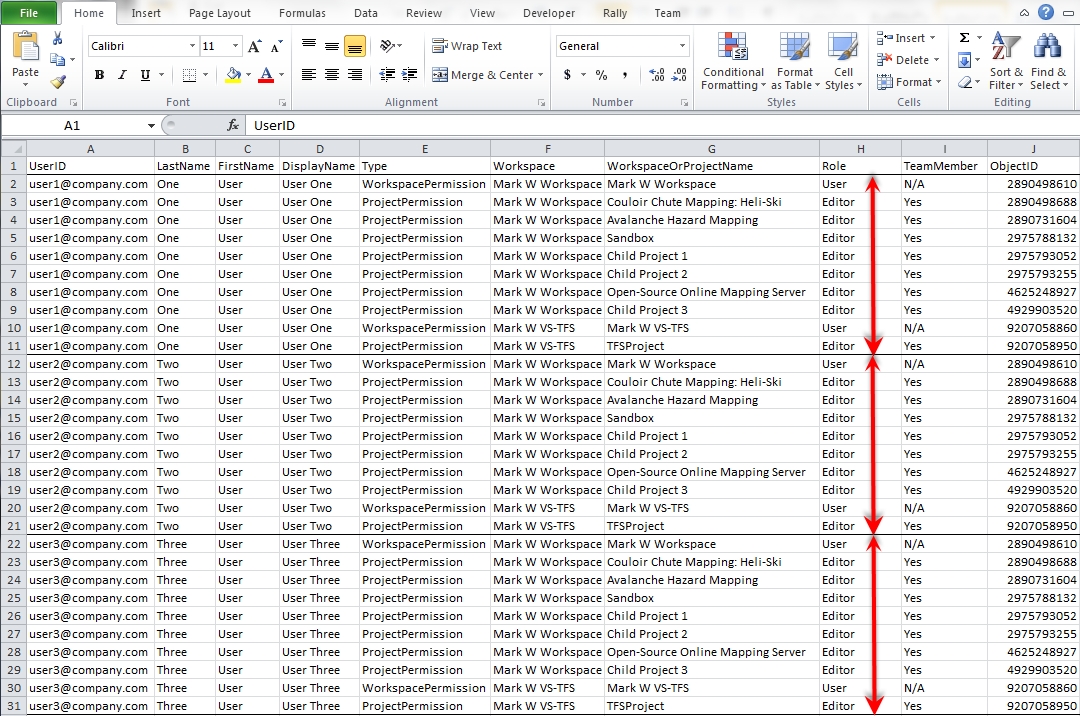
* **WorkspaceOrProjectName:** The Workspace or Project to which the **WorkspacePermission** or **ProjectPermission** will apply.
* **Role:** The Permission level being created for this **WorkspacePermission** or **ProjectPermission**
  + Valid **WorkspacePermission** Roles:
    - Admin
    - User
    - 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.

1. Now that the meanings of these fields are clear, you may start using the template to build your User Creation / Permissions assignment spreadsheet.
2. 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.



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.

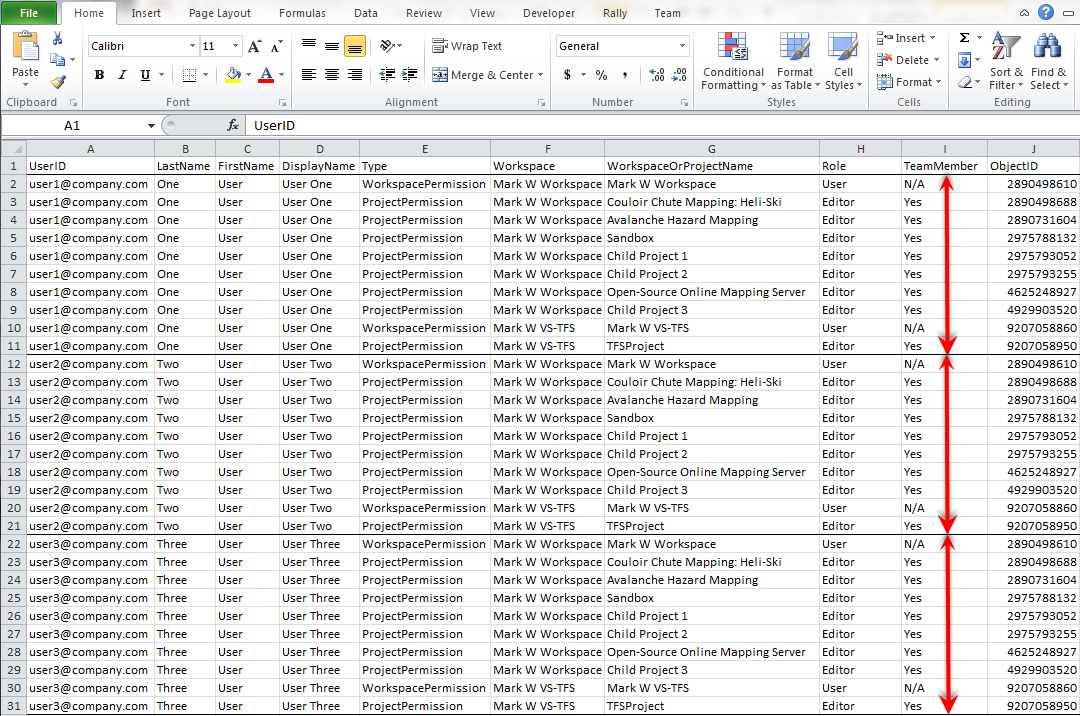
1. Now adjust the Role column to match the permissions desired for each user within the Workspace/Project of interest:



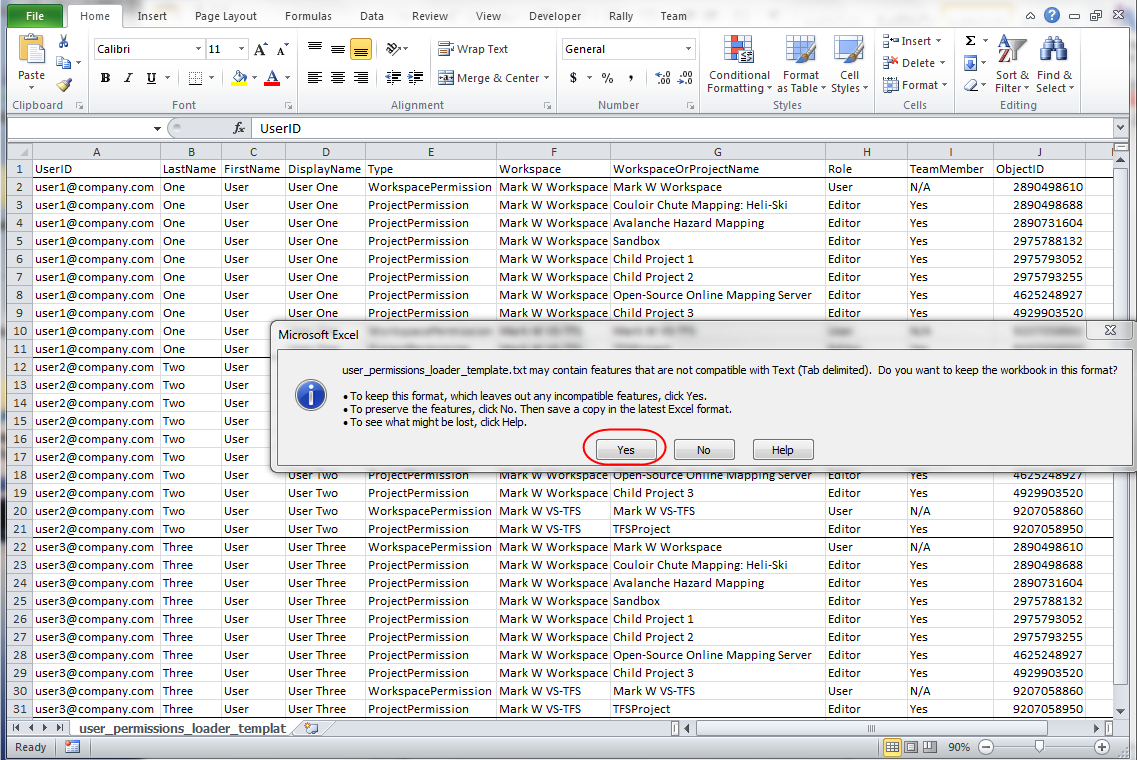
Important Usage Notes:

* *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.

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



1. 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.

1. 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: TFSProject

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

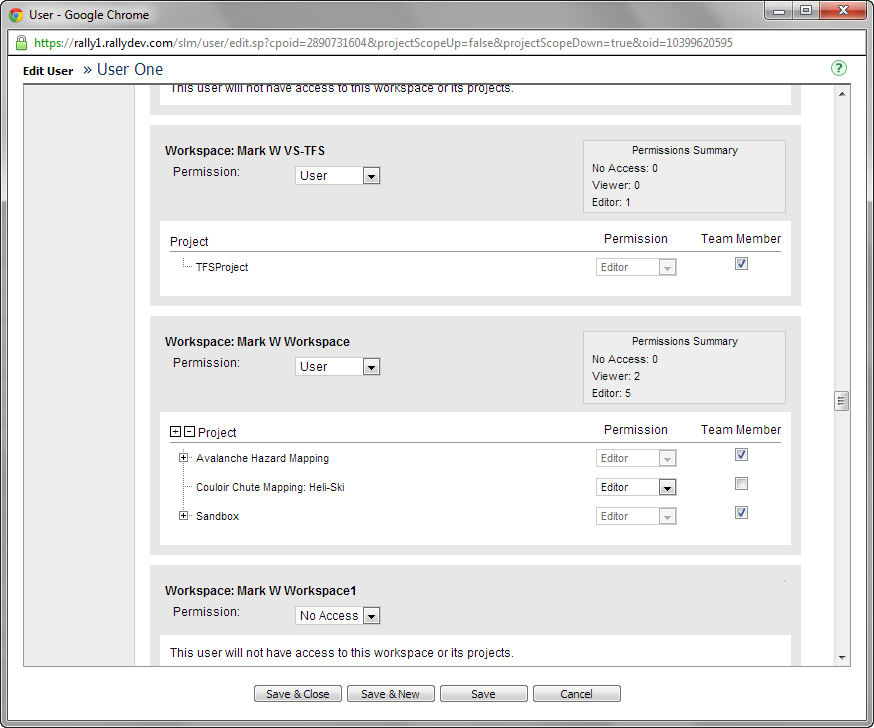
I, [2013-02-03T23:14:45.477854 #4784] INFO -- : user1@company.com Avalanche Hazard Mapping - Permission set to Editor

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

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





1. 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.
2. **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

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

1. Scripts used:  
   * user\_permissions\_summary.rb

1. 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.
2. 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.

1. Open the file in Excel. Since it is a *tab-delimited text file*, you’ll need to start Excel first.
2. File -> Open and navigate to and open user\_permissions\_summary.txt
3. This will start an import Wizard. You can just click the “Finish” button to accept all defaults and open the file:  
     
   
4. Here’s what the file should look like in Excel.



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.

1. **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

### 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.

1. Open the file in Excel. Since it is a *tab-delimited text file*, you’ll need to start Excel first.
2. File -> Open and navigate to and open user\_permissions\_summary.txt
3. This will start an import Wizard. You can just click the “Finish” button to accept all defaults and open the file:  
     
   
4. Here’s what the file should look like in Excel.

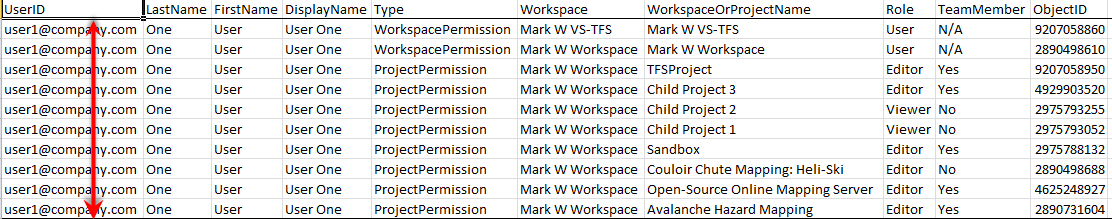


The file contains a summary of all User Permissions assigned to users within the Workspaces of interest.

***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.

1. 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.



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



1. 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.
2. 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.
3. 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: TFSProject

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 TFSProject - No permission updates

I, [2013-02-03T23:27:33.103759 #7092] INFO -- : user1@company.com TFSProject - 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

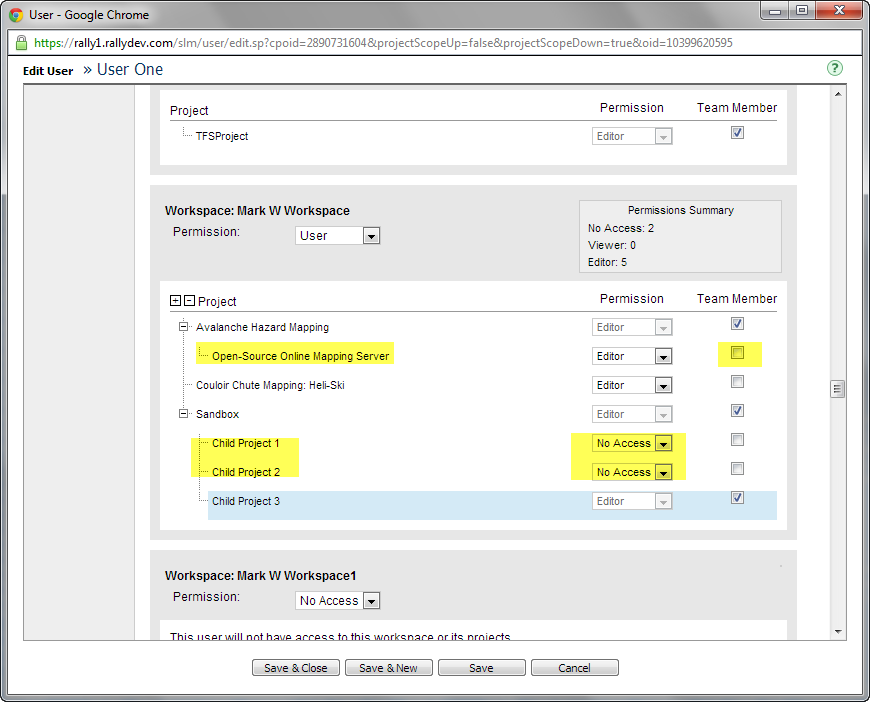
I, [2013-02-03T23:27:33.541784 #7092] INFO -- : user1@company.com Open-Source Online Mapping Server - No permission updates

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

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





### 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 by synchronizing Project Permissions, Workspace Permissions are not automatically mirrored, since upon creation of a Project Permission, the minimum needed Workspace Permission is automatically created by Rally, if not present.  
     
   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

### 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:  
   * 1. 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

1. Make sure to leave the first row column header “UserID” intact – the script automatically skips the first row.
2. 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.

1. 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.

### 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

1. There is a sample template file called change\_usernames\_template.csv in the user management directory.
2. 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.
3. 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:

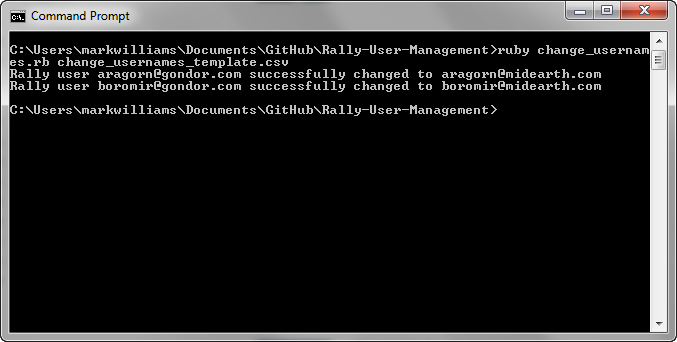
# :usernameandemail => resets both UserName and Email to the updated value

# :usernameonly => only resets UserName. Email address remains unchanged

$mode = :usernameandemail

1. Run the script.

ruby change\_usernames.rb change\_usernames.csv



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

### 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'

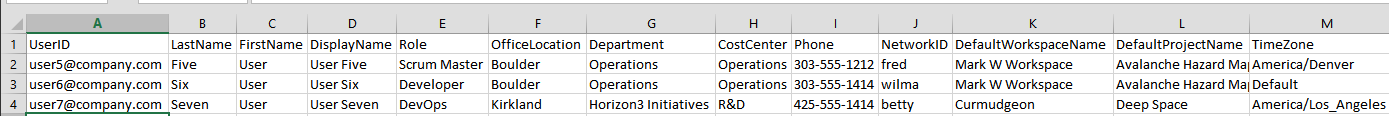
$my\_password = 'topsecret'

$my\_base\_url = "https://rally1.rallydev.com/slm"

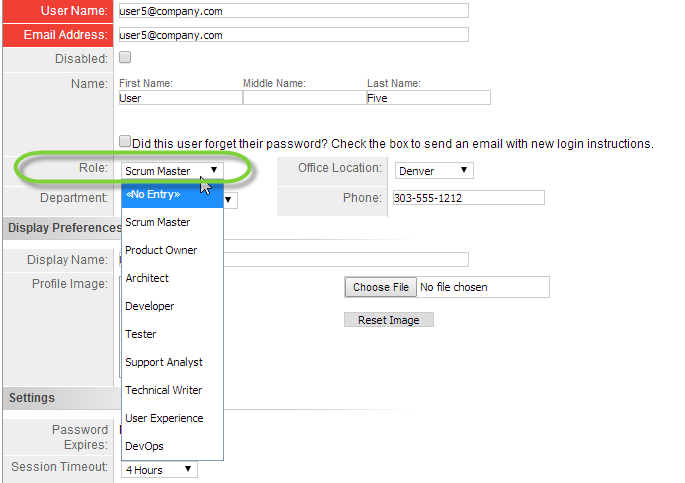
#API Version

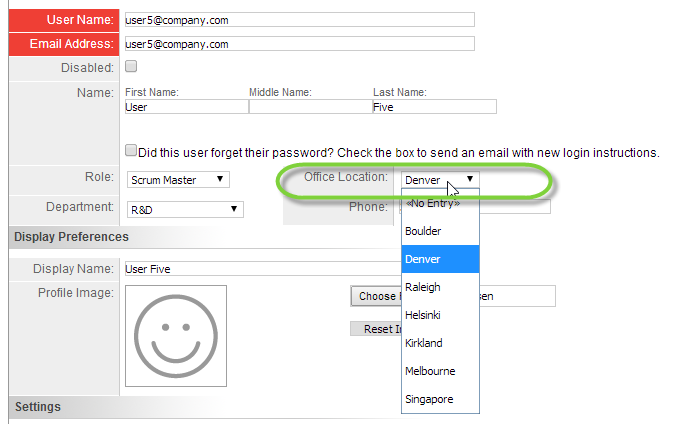
$wsapi\_version = "1.43"

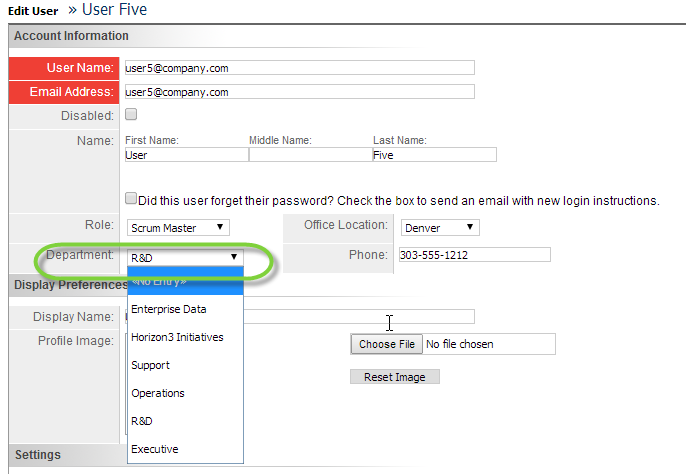
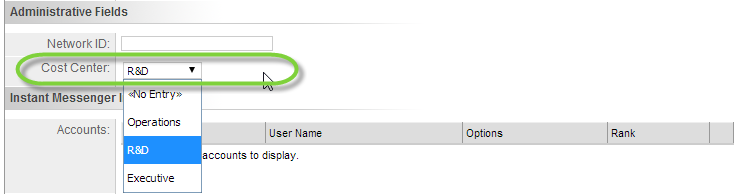
1. Scripts used:   
   * update\_user\_attributes.rb
2. Prepare an thirteen-column, *tab-delimited* text file containing a list of users and attributes you wish to update. There is a template New User file called update\_user\_attributes\_template.txt to get you started. ***Note:*** The *only* required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



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



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

1. 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.
2. 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

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

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### 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:  
   * 1. 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)

1. 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

1. 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

1. 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.
2. If the LDAP feature has been enabled in the Control Panel, try the login using one of the Onprem Ldap Usernames created.