**Ruby ExImporter Configuration Guide**

Introduction

The ExImporter code is built on a Ruby façade to our REST web service API. As this is still mostly an internal tool, any feedback you have on improving it would be greatly appreciated.

The documentation is broken into three sections as follows:

* Installing Ruby
* Exporting Data
* Importing Data

Notes

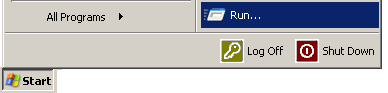
There are a couple of things to note if you are exporting and importing your artifacts into your workspace(s)

* Please export the stories by project.  We do not export the Project, so you will lose those designations if you export from the parent project (for subscriptions with project hierarchies).
  + Before you import, make sure you’ve created the new project in Rally and specify the location.
* Revisions, attachments, and custom fields are not retained on any work product.
* Please be sure that all the stories that you plan to import into your new workspace have unique names. Possible odd linkages may occur between stories and tasks etc when there are duplicate names.
* Please remove information in the Owner, Release, Iteration, and Package columns in the exstories file prior to importing, unless matching Owners, Releases, Iterations and Packages exist in your new workspace.
  + This program will not create these, and will error when it doesn't find a match.

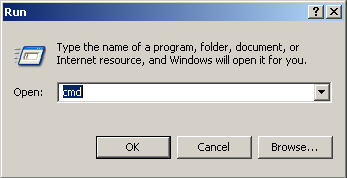
Installing Ruby

To get started, follow these steps:

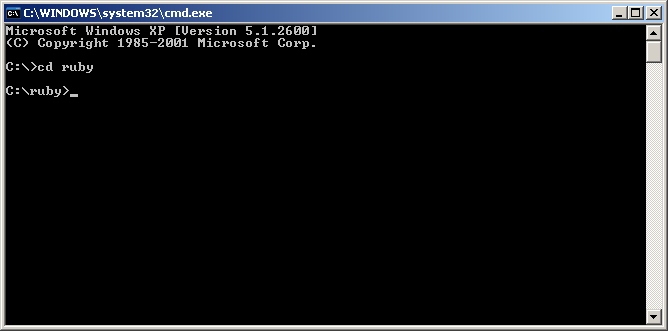
1. Install the Ruby Runtime Environment: <http://rubyforge.org/projects/rubyinstaller/>
2. Once that's been installed, go ahead and open your command prompt and get to the ruby directory that was created. In this example, Ruby was installed off the hard drive at C:\ruby
   1. Click on your Start bar and click “Run”



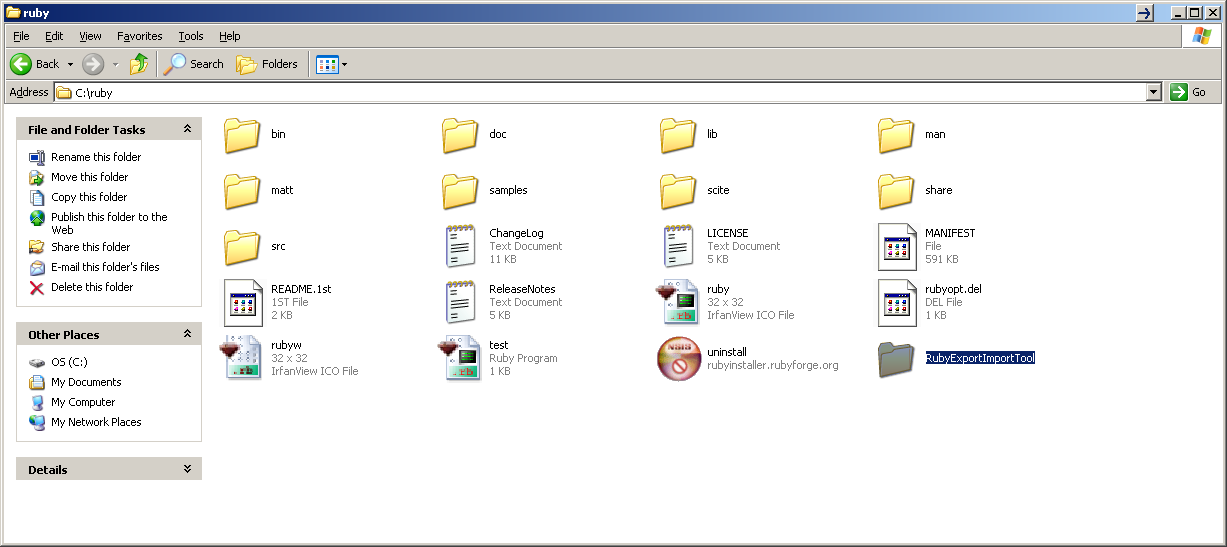
* 1. Type “cmd” into the drop down list and click OK



* 1. A command prompt window appears. Navigate to where you installed Ruby



1. Run the installs for the 3 gems.  You should see some messaging like this:  
     
   C:\ruby>gem install rally\_rest\_api  
   Bulk updating Gem source index for: http://gems.rubyforge.org  
   Successfully installed rally\_rest\_api-0.7.10  
   Installing ri documentation for rally\_rest\_api-0.7.10...  
   Installing RDoc documentation for rally\_rest\_api-0.7.10...  
     
   C:\ruby>gem install fastercsv  
   Successfully installed fastercsv-1.2.3  
   Installing ri documentation for fastercsv-1.2.3...  
   Installing RDoc documentation for fastercsv-1.2.3...  
     
   C:\ruby>gem install builder  
   Successfully installed builder-2.1.2  
   Installing ri documentation for builder-2.1.2...  
   While generating documentation for builder-2.1.2  
   ... MESSAGE:   Unhandled special: Special: type=17, text="<!-- HI -->"  
   ... RDOC args: --ri --op c:/ruby/lib/ruby/gems/1.8/doc/builder-2.1.2/ri --title Builder -- Easy XML Building --main README --line-numbers --quiet lib CHANGES Ra kefile README doc/releases/builder-1.2.4.rdoc doc/releases/builder-2.0.0.rdoc do c/releases/builder-2.1.1.rdoc (continuing with the rest of the installation) Installing RDoc documentation for builder-2.1.2...
2. Extract the attached .zip file into the ruby directory.



Exporting Data

1. Open the RubyExportImportTool folder and edit the default.properties file. The file looks like this:

# Basic Properties File

# for production

setup.base\_url=**https://rally1.rallydev.com/slm**

#setup.base\_url=https://test2.f4tech.com/slm

Make sure your Base URL is set correctly. In this instance, it’s set to our Production environment.

#Export Workspace and User Name

export.user.name=**username** <- Enter your user name here

export.user.password=**password** <- Enter your password here

export.workspace=**workspace** <- Enter the workspace you wish to export FROM here

export.project=**project** <- Enter the project you wish to export FROM here

Remember, your username is a full email address. For example, “paul@acme.com” is correct, just “paul” is not.

#Import Workspace and User Name

import.user.name=**username** <- Enter your user name here

import.user.password=**password** <- Enter your password here

import.workspace=**workspace** <- Enter the workspace you wish to import TO here

import.project=**project** <- Enter the project you wish to import TO here

Also, you must make sure the destination workspace and project already exist. Otherwise, you’ll receive and error and the import will not work!

#Export From Rally

releases.export=**true**

releases.export.filename=export/exreleases.csv

iterations.export=**true**

iterations.export.filename=export/exiterations.csv

defects.export=**true**

defects.export.filename=export/exdefects.csv

testcases.export=**true**

testcases.export.filename=export/extestcases.csv

# For Use Case Workspace

cards.export=**false**

cards.export.filename=export/exstories.csv

# For User Story Workspace

userstories.export=**true**

userstories.export.filename=export/exstories.csv

userstories.export.tasks=false

For the time being, we’re going to not discuss the Import settings, but it’s important to make sure all the settings are set to **false**.

#Import Into Rally

releases.import=**false**

releases.import.filename=import/releases.csv

iterations.import=**false**

iterations.import.filename=import/iterations.csv

stories.import=**false**

stories.import.filename=import/stories.csv

defects.import=**false**

defects.import.filename=import/defects.csv

testcases.import=**false**

testcases.import.filename=import/testcases.csv

testfolders.import=**false**

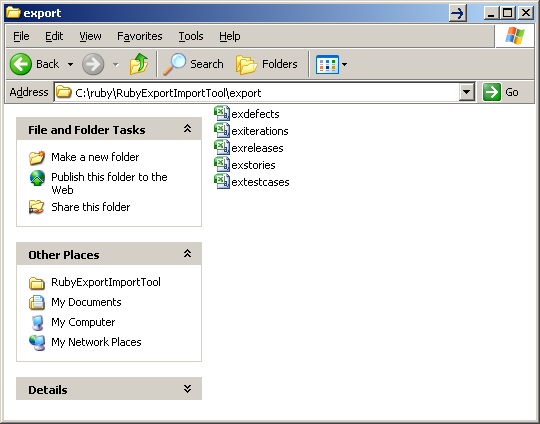
testfolders.import.filename=import/testfolders.csv

discussions.import=**false**

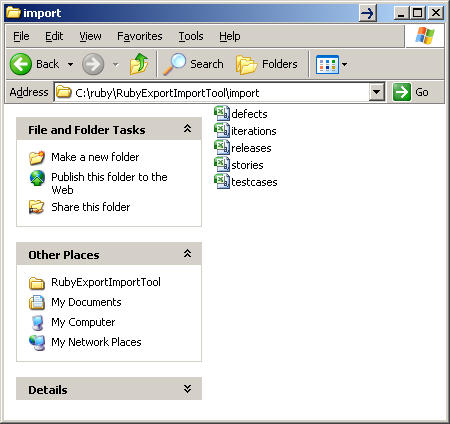
discussions.import.filename=demodata/discussions.csv

By setting each parameter to “true”, you will export this type of work product. If you only want a particular artifact, set it to “true” and the rest to “false”. Also, if “userstories.export” is set to true, then “cards.export” must be set to false.

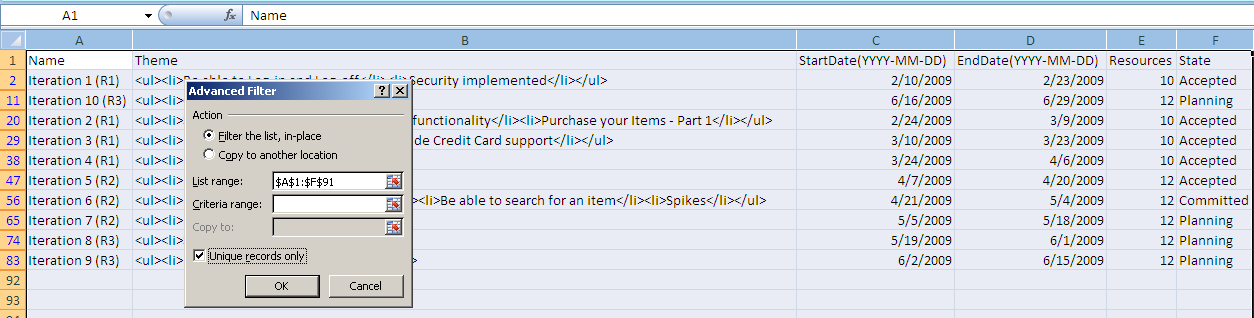
1. Be sure to save default.properties file. It’s a good idea to keep this window open as you’ll be making more configuration changes in later steps.
2. Run the Ruby script from the command line.
   1. From the command prompt, type “ruby eximporter.rb”
   2. Refer to the readme.txt for more information.
   3. Based on the settings we’ve selected, this script will export all releases, iterations, defects, test cases and user stories from the workspace/project we’ve pointed our export towards.
3. Once the script has run, we need to verify the data has exported correctly. Each artifact will have its own comma separated values (CSV) file
   1. Open the “exports” folder inside the RubyExportImportTool folder



* 1. You’ll see a list of exported artifact types. Select all of these files, click Edit > Copy and navigate to the “Import” folder under the RubyExportImportTool directory
  2. Rename the files to remove the “ex” prefix from the front of each:



* 1. Next, open up the iterations document. We need to ensure there are not duplicate entries of this data to prevent errors in the script. Once the document is open, filter the column and select the option to only show unique values.



* 1. Re-save the file in a CSV format.

Importing Data

You’re ready to begin importing data! We strongly suggest creating a new "sandbox" workspace in your enterprise subscription where you can test importing your data.  There you can create a project structure that matches your production workspace, and then try importing.

1. Open the RubyExportImportTool folder and edit the default.properties file. The file looks like this:

# Basic Properties File

# for production

setup.base\_url=**https://rally1.rallydev.com/slm**

#setup.base\_url=https://test2.f4tech.com/slm

#Export Workspace and User Name

export.user.name=**username** <- Enter your user name here

export.user.password=**password** <- Enter your password here

export.workspace=**workspace** <- Enter the workspace you wish to export FROM here

export.project=**project** <- Enter the project you wish to export FROM here

#Import Workspace and User Name

import.user.name=**username** <- Enter your user name here

import.user.password=**password** <- Enter your password here

import.workspace=**workspace** <- Enter the workspace you wish to import TO here

import.project=**Sandbox** <- Enter the project you wish to import TO here

#Export From Rally

releases.export=**true**

releases.export.filename=export/exreleases.csv

iterations.export=**true**

iterations.export.filename=export/exiterations.csv

defects.export=**true**

defects.export.filename=export/exdefects.csv

testcases.export=**true**

testcases.export.filename=export/extestcases.csv

# For Use Case Workspace

cards.export=**false**

cards.export.filename=export/exstories.csv

# For User Story Workspace

userstories.export=**true**

userstories.export.filename=export/exstories.csv

userstories.export.tasks=false

#Import Into Rally

releases.import=**true**

releases.import.filename=import/releases.csv

iterations.import=**false**

iterations.import.filename=import/iterations.csv

stories.import=**false**

stories.import.filename=import/stories.csv

defects.import=**false**

defects.import.filename=import/defects.csv

testcases.import=**false**

testcases.import.filename=import/testcases.csv

testfolders.import=**false**

testfolders.import.filename=import/testfolders.csv

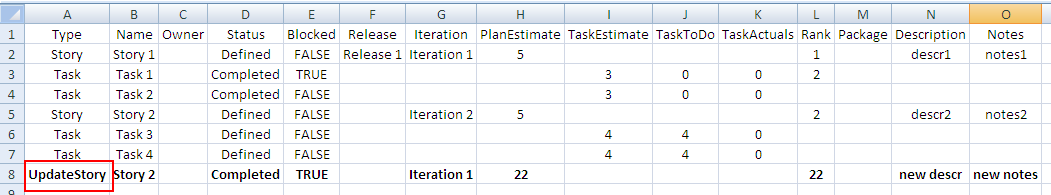
discussions.import=**false**

discussions.import.filename=demodata/discussions.csv

1. It is strongly recommended to import each item individually! To do this, set “releases.import” to “true” and keep the rest of the items set to “false”.
   1. Note: “testfolders” and “discussions” will always be set to “false”!
2. Run the Ruby script from the command line.
   1. From the command prompt, type “ruby eximporter.rb”
   2. Based on the settings we’ve selected, this script will not export anything and will only import the release data into our Sandbox environment.
3. When the script finishes, login to Rally and verify the data populated as expected.
4. Repeat steps 9 – 11 until you’ve successfully imported all release, iterations, stories, defects and test cases into your Sandbox environment.
   1. Your configuration settings should match these:

|  |  |  |
| --- | --- | --- |
| 1st Run | 2nd Run | 3rd Run |
| releases.import=**true** | releases.import=false | releases.import=false |
| iterations.import=**false** | iterations.import=true | iterations.import=**false** |
| stories.import=**false** | stories.import=**false** | stories.import=true |
| defects.import=**false** | defects.import=**false** | defects.import=**false** |
| testcases.import=**false** | testcases.import=**false** | testcases.import=**false** |
| testfolders.import=**false** | testfolders.import=**false** | testfolders.import=**false** |
| discussions.import=**false** | discussions.import=**false** | discussions.import=**false** |
| 4th Run | 5th Run |
| releases.import=false | releases.import=false |
| iterations.import=**false** | iterations.import=**false** |
| stories.import=**false** | stories.import=**false** |
| defects.import=true | defects.import=**false** |
| testcases.import=**false** | testcases.import=true |
| testfolders.import=**false** | testfolders.import=**false** |
| discussions.import=**false** | discussions.import=**false** |

1. There are a couple of built in features for the **story** imports you should be aware of:
   1. You can update a story by changing the type from “Story” to “UpdateStory”.
      1. You must make sure the syntax for “UpdateStory” is exactly as it is written and shown below.
      2. Unfortunately, you cannot use “UpdateStory” to add in custom fields.



* 1. You can also add tasks to a story during the import.

1. Additionally, you can import Custom fields. However, if you choose to add custom fields, please be aware of the following:
   1. The custom field tab should be the last column of the import.
   2. Prior to the import, when you add a custom field into the .csv file, it must be in the following format:
      1. The custom field must first be defined in Rally.
      2. For example: If you want your custom field to say “Lots of Fun”, you must enter it like this: “Custom:lots\_of\_fun”
         1. Notice the upper case of the value “Custom”. If you use “custom”, the script will run but it will not work!
2. When you’ve validated all the data imports correctly, go back and change your import workspace to the correct setting:

#Import Workspace and User Name

import.user.name=**username** <- Enter your user name here

import.user.password=**password** <- Enter your password here

import.workspace=**workspace** <- Enter the workspace you wish to import TO here

import.project=**project** <- Enter the project you wish to import TO here

1. Finished!