ALM Octane
Space definition strategies and best practices

White paper

MICRO FOCUS

Document release date: July 2018

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Overview

This white paper explores options and best practices for setting up your spaces and workspaces in ALM Octane.

Terminology

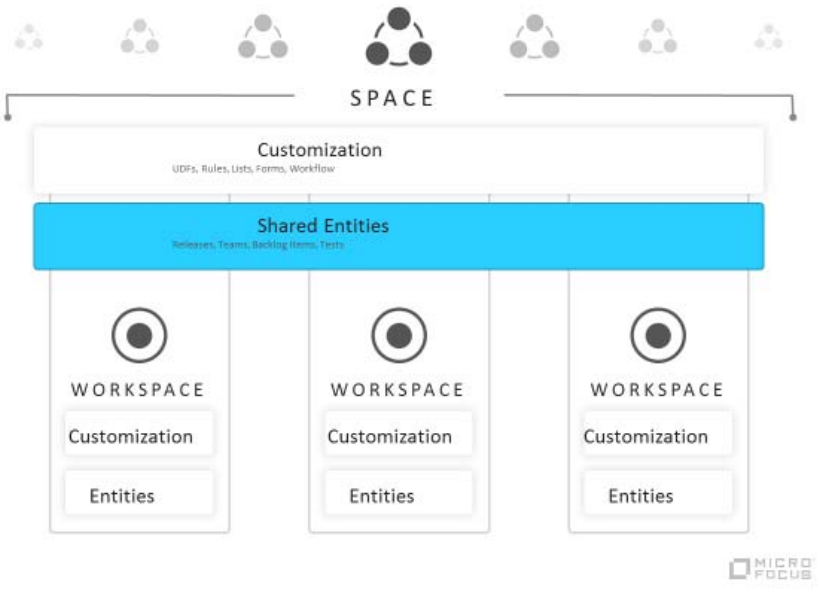
Term	Description
Site	Top level container for managing the different spaces created in ALM Octane, as well as a place to perform administrative tasks and manage users.
Space	Top level logical container. Provides isolation of data while allowing for data sharing and interaction. A space allocates its own resources when created, such as relational database schema, Elasticsearch indices, and repository location. Spaces can be shared (data can be shared) or isolated (total isolation of data). More about this below.
Workspace	This container is a working area. A user always works in the context of a specific workspace. A workspace is always contained in a space, and provides logical isolation of data and settings. The level of isolation is defined by the type of space in which it was created. For example, workspaces defined in a shared space can access shared information, while workspaces defined in for an isolated space cannot.

Types of spaces

SHARED SPACE

Final Structure

Blue indicates future content



ALM Octane Enterprise Edition provides the following types of spaces:

- **Shared space**
  Workspaces share customization and can share data. Cross-workspace reporting is possible. Some entities may be defined as global and be viewed across all workspaces.

Isolated space
Each workspace defines its own customization. Sharing between workspaces is not available. A user can be assigned to multiple workspaces and seamlessly switch between them.

ALM Octane Pro Edition only allows creation of isolated spaces. Shared spaces are an enterprise-level feature.

What can you share?

Sharing	Description
Data	Entities that can be shared include releases. *Sharing of other entities (such as epics, requirements, tests and so on) is on our roadmap.*
Customization	You can share the customization of how ALM Octane works and the user experience. This includes forms, lists, and user-defined fields.
Processes	You can share rules and workflow between workspaces in a shared space. This lets you share processes from one workspace to another.

Strategies for setting up isolated and shared spaces

When planning your ALM Octane deployment, break down your projects into a structure that will provide you with the best experience for your teams.

The general rule of thumb is that unless there's an actual need for complete isolation of workspaces, using shared spaces will allow you to better scale out ALM Octane as the projects grow. That being said, you should consider the factors below as you make your decision.

Amount of interaction that the projects have and their need for sharing data

If you have projects that have close interaction and work together frequently, consider putting them either in the same workspace, or in different workspaces under the same shared space.

This applies to the need to share similar processes, the need to share customization (detailed below), and the need to share data.

When trying to evaluate and understand interaction level between the projects, and the need to share data, you should mainly relate to factors like team collaboration level, dependencies among teams, common releases, integrations among the applications, and so on.

The level of interaction for these teams will be the major factor for deciding whether teams/products should be in the same workspace (see "Workspace strategy" below). But in case the teams/products are in separate workspaces, yet still have some interaction that require dependencies between entities and sharing of data, the corresponding workspaces should reside within the same shared space.

Workspaces that reside within the same shared space are more easily able to share entities and set dependencies by:

- Defining shared entities at the shared space level.
- Moving entities from one workspace to another.

Eventually, defining dependencies between entities in different workspaces within the same shared space. This functionality is currently on our roadmap… stay tuned!

Projects that have shared processes and policies

If you are an ALM Octane Enterprise Edition customer, you can enforce your process and align organizational standards to all workspaces within shared space by customizing at the shared space level (using business rules, common fields, workflow, lists, and so on).

If different projects have their own process definitions and policy standards that need not be shared, we recommend that you separate the workspaces to different shared spaces, and manage the common customizations on the different shared spaces.

Additionally, ALM Octane also provide flexibility on the workspace level, so customization between workspaces and the corresponding shared space don't have to be fully aligned.

Customize the main processes and policy standards on the shared space level and apply this shared customization to all workspaces. You can then modify your processes and standards further for individual workspaces.

Points to consider:

- Managing common customization for large number of workspaces, might result in a very complicated customization at the shared space level that will be hard for the space admin to manage and maintain. This could also eventually cause performance degradation.

  Basically, the space admin might not want to have a significant portion of the customization shared. The more workspaces there are with variances, the more work the space admin needs to do to manage the variances.

  So in this case, we generally recommend that you make sure that the customization at the shared space level is relevant and needed for all workspaces. Additional flexibility can be done by customizing each individual workspace, but if there is a need for common customization for a sub-set of workspaces within the same shared space, then probably these workspaces should be in a different shared space.
- The same applies to management of shared assets. If there are too many variations between the workspaces and the need for different shared entities, it can result in a large number of shared assets, which might be hard to manage.

Cross-workspace reporting

If you need to track projects managed in different workspaces (for example, the projects share the same release and you want to track the progress of each workspace for this release), having these workspaces associated with the same shared space will enable cross0workspace reporting. Your graphs and charts in the ALM Octane dashboard will reflect the data from different workspaces.

Note that this is also possible if the workspaces are associated with different shared spaces, but not from ALM Octane. This can be done using OData, which extract workspace data to external BI tools.

Data isolation

If a project requires absolute data isolation, it should be associated with its own dedicated isolated space. This ensures that no configuration mistake will inadvertently expose confidential information.

Disaster recovery

Each space is stored in a different database schema. Workspaces are stored in the same database schema as their associated space. This means that backup and recovery can be done for an entire space at one time.

If there is large number of workspaces associated with the same space, if recovery is needed for only one workspace, keep in mind that you will have to recover all workspaces for the space.

Strategies for setting up workspaces

Similar to the strategy for setting up spaces, you should also consider how you partition the project within the space. The factors to consider are similar to the space strategy parameters, but on smaller scale.

If the projects are tightly wound and a large portion of the data needs to be used by different teams, the projects should reside within the same workspace to allow ease of data sharing. ALM Octane does not have built-in mechanisms to partition data within a workspace, so you have to rely on building filters correctly, so that each project member sees only the relevant information.

Consider the following factors.

Sharing of data between the different teams

The main factor you should consider when determining if teams and projects should be defined for the same workspace or separate workspaces is the level of sharing that is common between the teams. If teams share the same release planning and content, or have strong dependencies on different entities, probably these teams/projects should share the same workspace.

Data Isolation

The use of different workspaces provide data isolation. If there is a need to have isolate data between the different teams/projects, probably these teams/projects should be managed in different workspaces.

To some extent, ALM Octane provide data hiding capabilities, but data hiding should be used for specific cases when some of the entities need to be hidden for certain users/teams. Data hiding should not be used for cases where most of the data should be hidden—in this case, use different workspaces for data isolation.

Different Processes

All workspaces within the same shared space inherit the common customization from the shared space level. In addition, each workspace has flexibility for customizing on top of the shared customization. This enables you to define processes relevant for the workspace level only, even if the workspace is associated with a shared space.

If you need different customization at the workspace level to comply with different processes, and there is no need to share data, it is best to define these projects/teams in different workspaces.

Important to know!

Try to break down your spaces into as many workspaces as possible as this will help Octane perform better and will make searching for data and concentrating on you tasks easier. The best practice is to prefer many small workspaces on the same space than few very big workspaces.

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