

ALM Octane-Space and Workspace Configuration

Course Summary

Description

This course provides instructions that admins can use to configure space and workspaces. Students learn how to manage spaces and workspaces, users, releases, custom fields and lists, and the ALM Octane lifecycle.

Topics

- Introduction to ALM Octane
- Space-Workspace hierarchy
- Manage spaces (for space admins)
- Manage workspaces
- Manage users
- Assign roles and permissions
- Set up a release
- Manage teams
- Define work days
- Set up calendars
- Design forms
- Customize fields
- Set up lists
- Customize entity display labels (Enterprise Edition)
- Set up workflow phases and transitions
- Business rules: Overview

Audience

This course is designed for quality assurance engineers, devops team members, project managers, and quality assurance leads.

Prerequisites

There are no prerequisites for this course.

Duration

Two days

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Course Outline

- I. Introduction to ALM Octane*
 - A. Overview
 - B. ALM Octane lifecycle
 - C. Common workflows
- II. Space-Workspace hierarchy*
 - A. Spaces and Workspaces overview
- III. Manage spaces*
 - A. Configure spaces
 - B. Create workspaces
- IV. Manage workspaces*
 - A. Edit workspaces
 - B. Manage users
- V. Manage users*
 - A. Create users
 - B. Manage roles and permissions
- VI. Assign roles and permissions*
 - A. Manage roles and permissions
- VII. Set up a Release*
 - A. Add releases
 - B. Manage releases
- VIII. Manage teams*
 - A. Create teams in workspaces
 - B. Assign teams to releases
- IX. Define work days*
 - A. Defining work days for a workspace
 - B. Defining work days for a team
- X. Set up calendars*
 - A. Predefined calendars
 - B. Create calendars
 - C. Calendars and workspaces
- XI. Design forms*
 - A. Predefined forms
 - B. Use the form designer
- XII. Customize fields*
 - A. Creating User-defined fields (UDF)
 - B. Setting attributes for UDF
- XIII. Set up lists*
 - A. Working with pre-defined and user-defined lists
 - B. Sharing lists between spaces
- XIV. Set up workflow phases and transitions*
 - A. Overview
 - B. Defining phases
 - C. Transition between phases
- XV. Business rules*
 - A. Overview
 - B. Trigger actions using business rules