ADO Work Item Generation Process

Publication Date	
ADO Work Item	169563
Document Owner	Bill Walton
Contact	v-wwalton@microsoft.com
For revisions/updates or to make suggestions, contact the owner.	

1 Scope

Each Work Item category requires differing inputs when generated in the Axure Development Operations ADO) User Interface (UI). For the purposes of this document, the New Bug, New Feature, and New Move Add Change (MAC) Work Item categories are fully documented. The ADO UI navigation and controls are similar across all Work Item categories.

2 Synopsis

The process for generating ADO Work Items has changed- primarily in the way the UI in the ADO application is presented. Work Item categories and data input/selection fields have been removed and others modified. The new process is documented here.

3 Target Audience

All ADO users
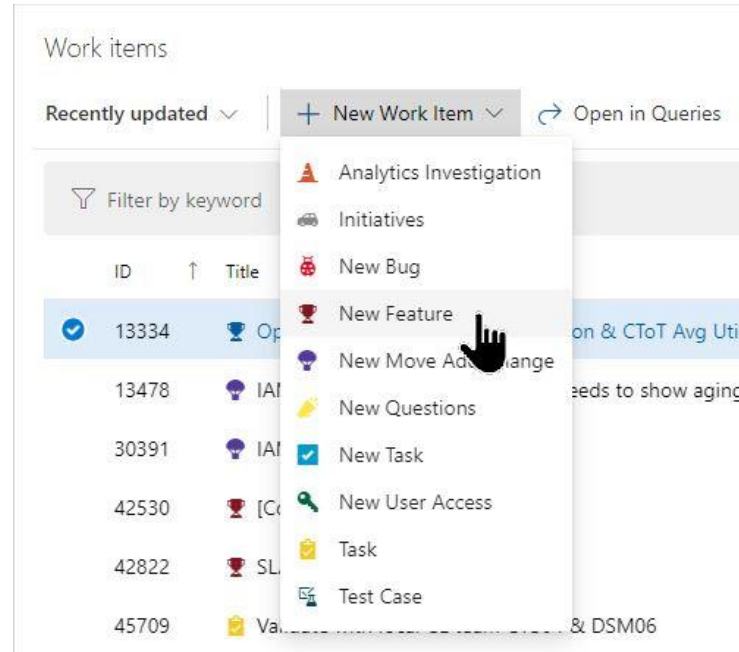
4 Process

4.1 Work Item Definition

FIGURE 4.1.1. WORK ITEM CATEGORY SELECTIONS

4.1.1 Select a Work Item Category

Click +New Work Item in the Menu Bar at the top of the ADO User Interface (UI).

Select the [appropriate Work Item Category] from the listed options.

Definition	Used to determine the category of the Work Item
Selectable Options	• New Bug • New Feature • New Move Add Change (MAC)

Field Type	Drop down selection field
Field Location	DC Health Dashboards > Work Items Menu Bar
NOTE: Each Work Item category requires different data inputs from the user	

After the Work Item category is selected the NEW [Work Item category] user interface is displayed.

NOTE: A new browser window does not open after selection of the Work Item category.

4.1.2 <u>New Bug Work Item Process</u>
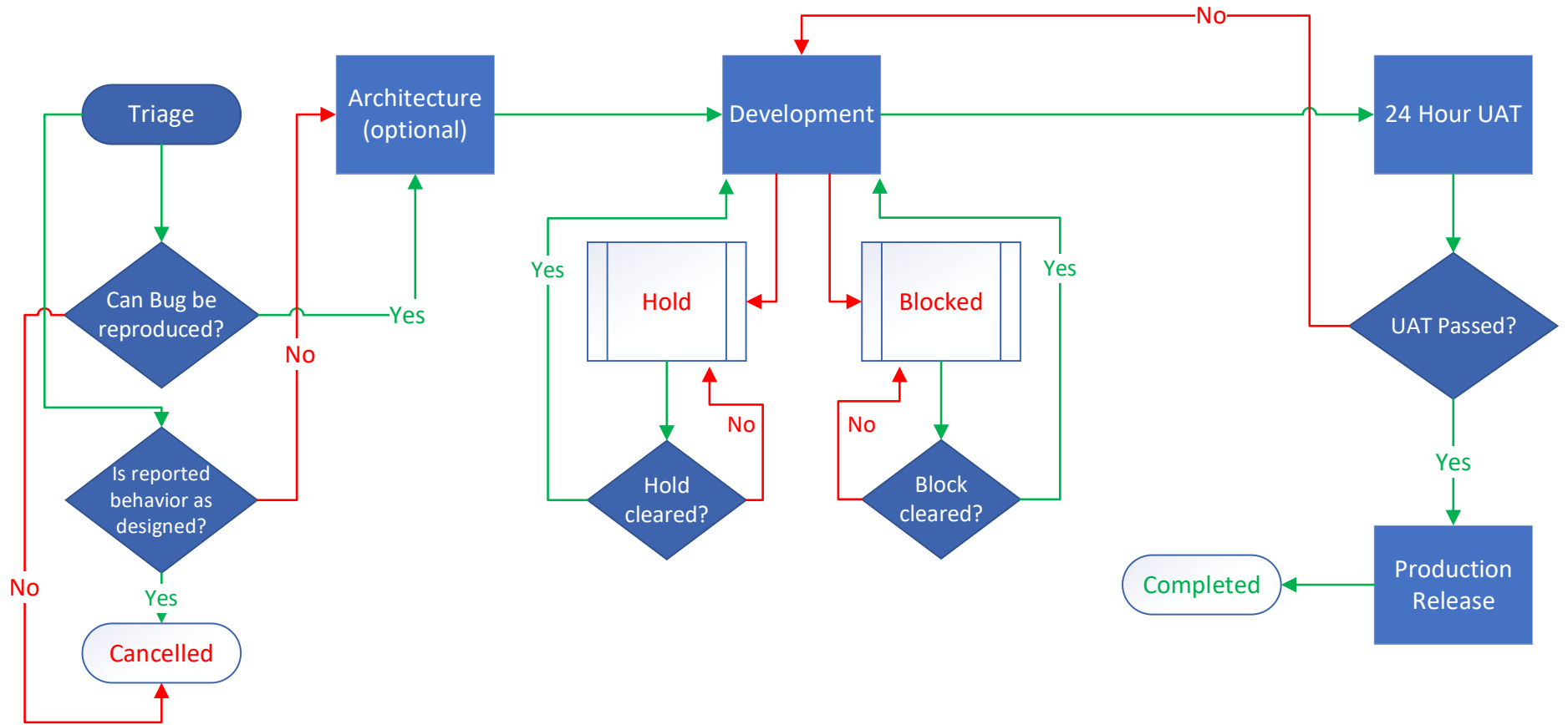
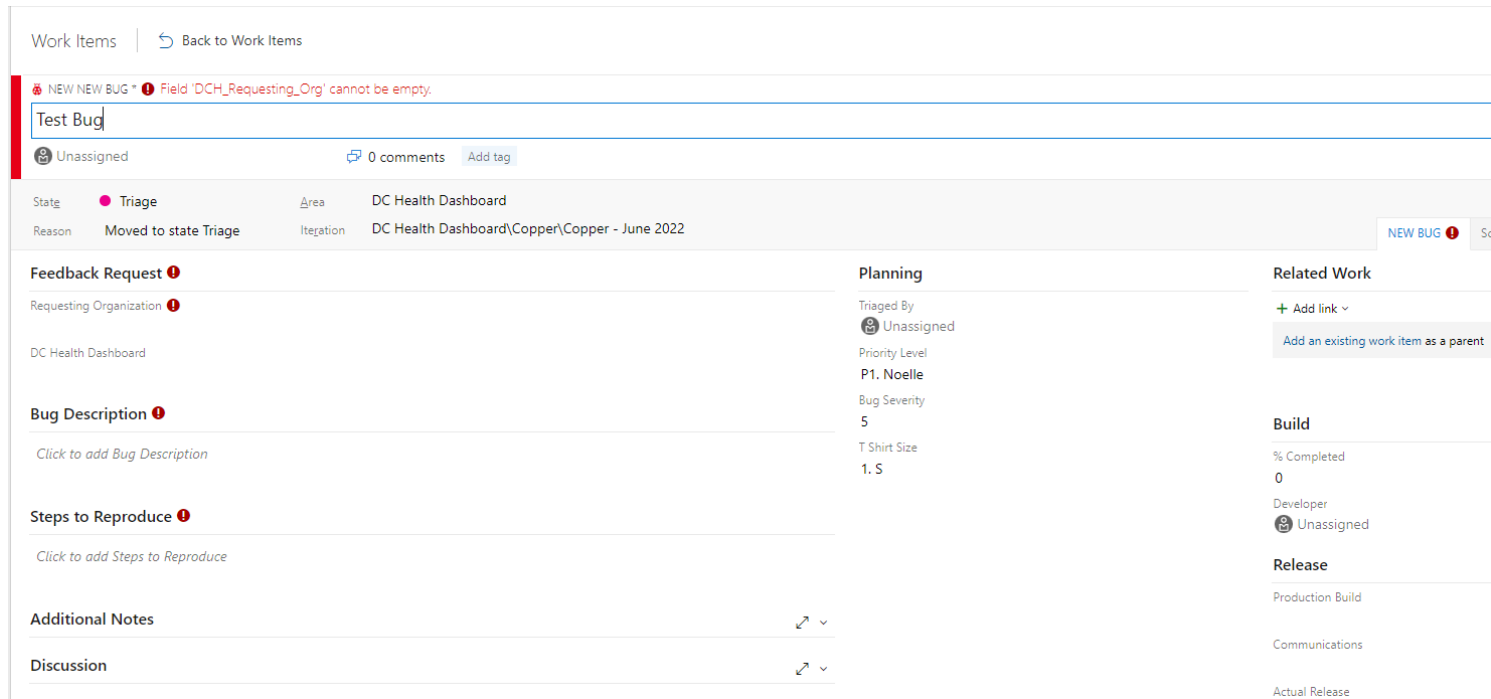## 4.1.2.1 New Bug Process Diagram

FIGURE 4.1.2.1. NEW BUG PROCESS DIAGRAM

4.1.2.2 New Bug State Matrix

NOTE: During the development cycle the data fields in the ADO Work Item should be updated with any new information, changes to existing information, and any other relevant data applicable to the Work Item. Every field can be edited after the Work Item is generated in ADO.

NOTE: ADO Work Items should be kept in an inactive state (Backlog, In Progress – Hold, or Blocked for example) unless they are being actively prosecuted. The rule of thumb is to keep only one (1) Work Item in In Progress – Development state at a time.

State	Definition	Responsible Owner	Required Fields	Exit Criteria
Triage	Initial stage of a new bug fix Work Item	Program Manager	- Title - Area - Iteration - Requesting Organization - DC Health Dashboard - Bug Description - Steps to Reproduce - Additional Notes - Triaged By - Priority Level - Bug Severity - T Shirt Size - Developer - State	Bug has been evaluated and prioritized for investigation and fix development

State	Definition	Responsible Owner	Fields Requiring Updates	Exit Criteria
Architecture (optional)	Signifies basic requirements for the bug fix are being mapped out	Program Manager, Developer	- Discussion - Work Notes % Completed - State - Reason - Others if changes/updates apply	*Optional step unless schema changes are required*
Development-In Progress	Signifies development of the bug fix is underway	Developer	- Discussion - Work Notes % Completed	Development is completed and bug fix is ready for UAT

			• State	
			• Reason	
			• Others if changes/updates apply	
Development-Hold	Signifies development of the bug fix is on hold for DCS-BI internal reasons	Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Development hold cleared and bug fix is ready for UAT
Blocked	Signifies development of the bug fix is blocked due to outside dependencies	Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Outside dependency resolved and bug fix is ready for UAT
UAT	User Acceptance Testing- signifies the bug fix is in test, either by whomever reported it [or] by a larger group of testers	Reporting personnel, Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Completion of UAT with passing evaluation and bug fix is ready for release to production. *NOTE: There is a 24-hour response window before release to production*
Completed	Signifies bug fix is completed and in production	Program Manager	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Production release completed

Cancelled	Signifies the bug fix was cancelled and the reason[s] why it was cancelled are provided	Program Manager	- Discussion - Work Notes % Completed - State - Reason - Others if changes/updates apply	- If bug cannot be reproduced the request will be cancelled - If reported behavior is as designed bug fix will be cancelled

4.1.3 New Feature Work Item Process

4.1.3.1 New Feature/New Move Add Change (MAC) Process Diagram

Triage

Evaluation passed?

High Pri

Cancelled

Current Month

Ready for Development?

Next Month

Prioritization Evaluation (Resource Availability, Scheduling)

Architecture (optional)

Ready for Development?

Backlog

Development

Hold

Hold cleared?

Blocked

Block cleared?

UAT

UAT Passed?

Production Release

Completed

No

Yes

Yes

Yes
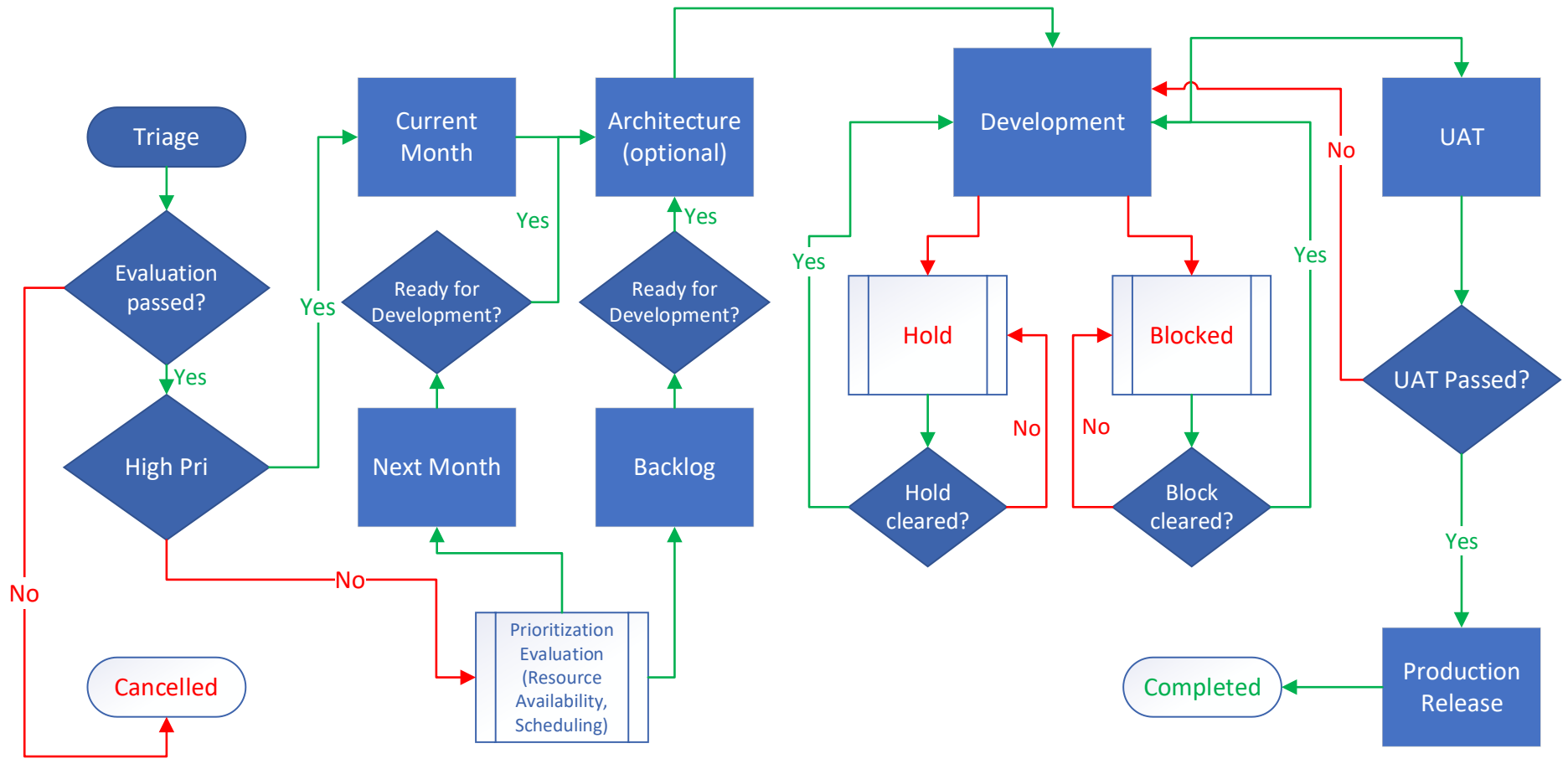
No

Yes

Yes

Yes

No

No

No

Yes

No

Yes

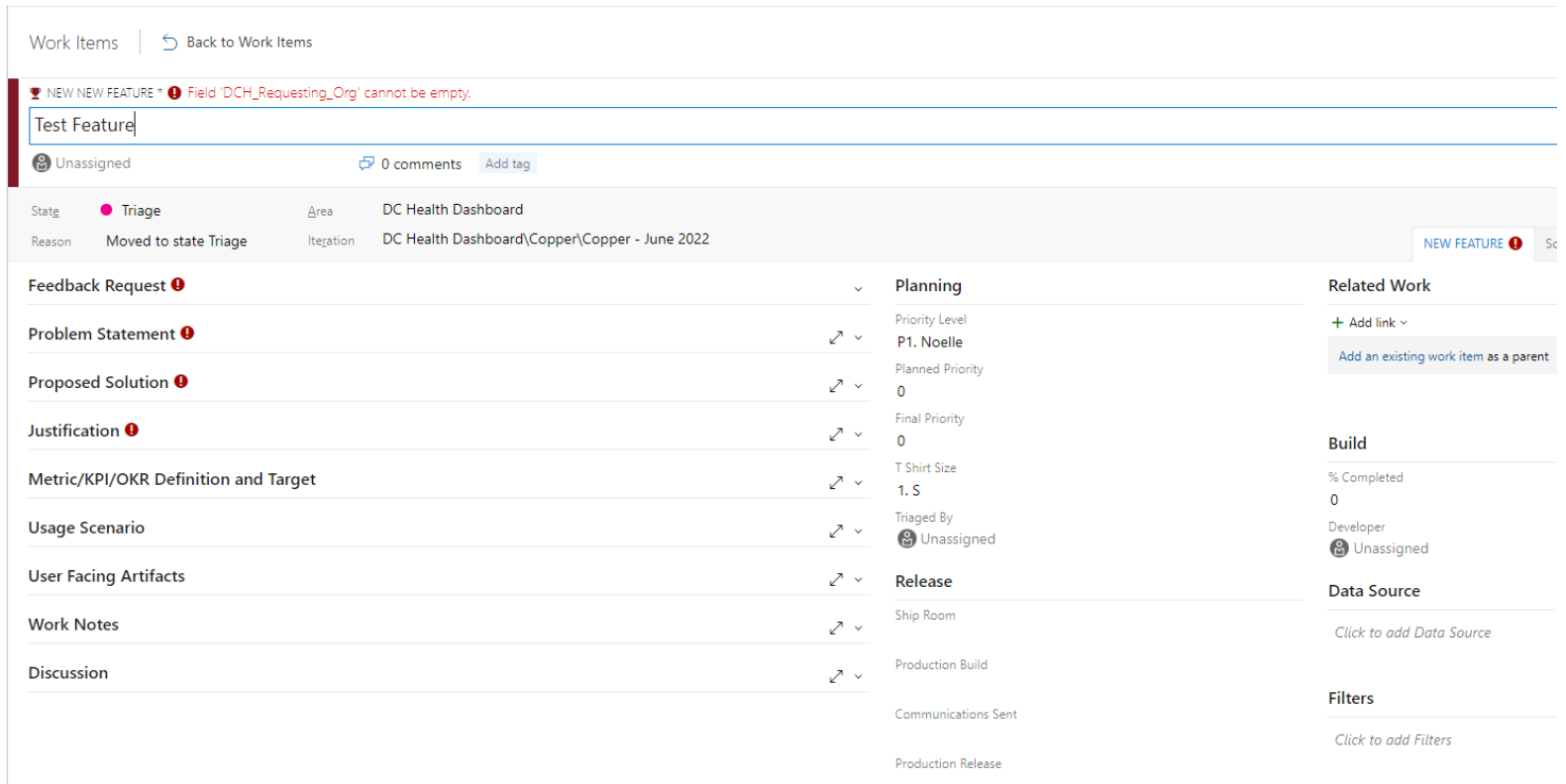FIGURE 4.1.3.1. NEW FEATURE PROCESS DIAGRAM

FIGURE 4.1.3.2. ADO NEW FEATURE SCREEN SHOT

4.1.3.2 New Feature State Matrix

NOTE: During the development cycle the data fields in the ADO Work Item should be updated with any new information, changes to existing information, and any other relevant data applicable to the Work Item. Every field can be edited after the Work Item is generated in ADO.

NOTE: ADO Work Items should be kept in an inactive state (Backlog, In Progress – Hold, or Blocked for example) unless they are being actively prosecuted. The rule of thumb is to keep only one (1) Work Item in In Progress – Development state at a time.

State	Definition	Responsible Owner	Required Fields- New Feature	Exit Criteria
Triage	Initial stage of a New Feature Work Item	Program Manager	- Title - Area - Iteration - Requesting Organization - DC Health Dashboard - Problem Statement - Proposed Solution - Justification - Metric/KPI/OKR Definition and Target - Usage Scenario - User Facing Artifacts - Work Notes - Priority Level - Planned Priority - T Shirt Size - Triaged By - State	Requested Feature has been evaluated and prioritized to move into Backlog, Next Month, or Current Month

State	Definition	Responsible Owner	Fields Requiring Updates by State	Exit Criteria
Backlog	Signifies the Feature is not currently being actively worked but has not been cancelled	Program Manager	- Discussion - Work Notes % Completed - State - Reason - Others if changes/updates apply	Change in Feature status from Backlog to Next Month [or] Current Month

Next Month	Signifies development of the new Feature is planned to begin in the next month	Program Manager	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Change in Feature status from Next Month to Current Month
Current Month	Signifies development of the new Feature is planned to begin in the current month	Program Manager	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Change in Feature status from Current Month to Architecture
Architecture	Signifies basic requirements of the new Feature are being mapped out	Program Manager Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Feature data modeling and queries reviewed for optimization
Development- In Progress	Signifies development of the new Feature is underway	Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Development is completed and Feature is ready for UAT

Development-Hold	Signifies development of the new Feature is on hold for DCS-BI internal reasons	Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Development hold cleared and Feature is ready for UAT
Blocked	Signifies development of the new Feature is blocked due to outside dependencies	Program Manager Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Block resolved and Feature is ready for UAT
UAT	User Acceptance Testing- signifies the new Feature is in test, either by the requesting business [or] by a larger group of testers	Requesting personnel Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Completion of UAT of the Feature by Customer/Users with passing evaluation and Feature is deemed ready for release to production. *NOTE: Based on UAT feedback, Feature may go back to Development*
Completed	Signifies the new Feature is completed and in production	Program Manager	• Discussion • Work Notes • % Completed • State • Reason	Production release of Feature completion and documentation completed

			• Others if changes/updates apply	
Cancelled	Signifies the new Feature was cancelled and the reason[s] why it was cancelled are provided	Program Manager	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	If Feature does not pass initial evaluation based on the justification provided, the Feature may be cancelled

4.1.4 New Move Add Change (MAC) Work Item Process

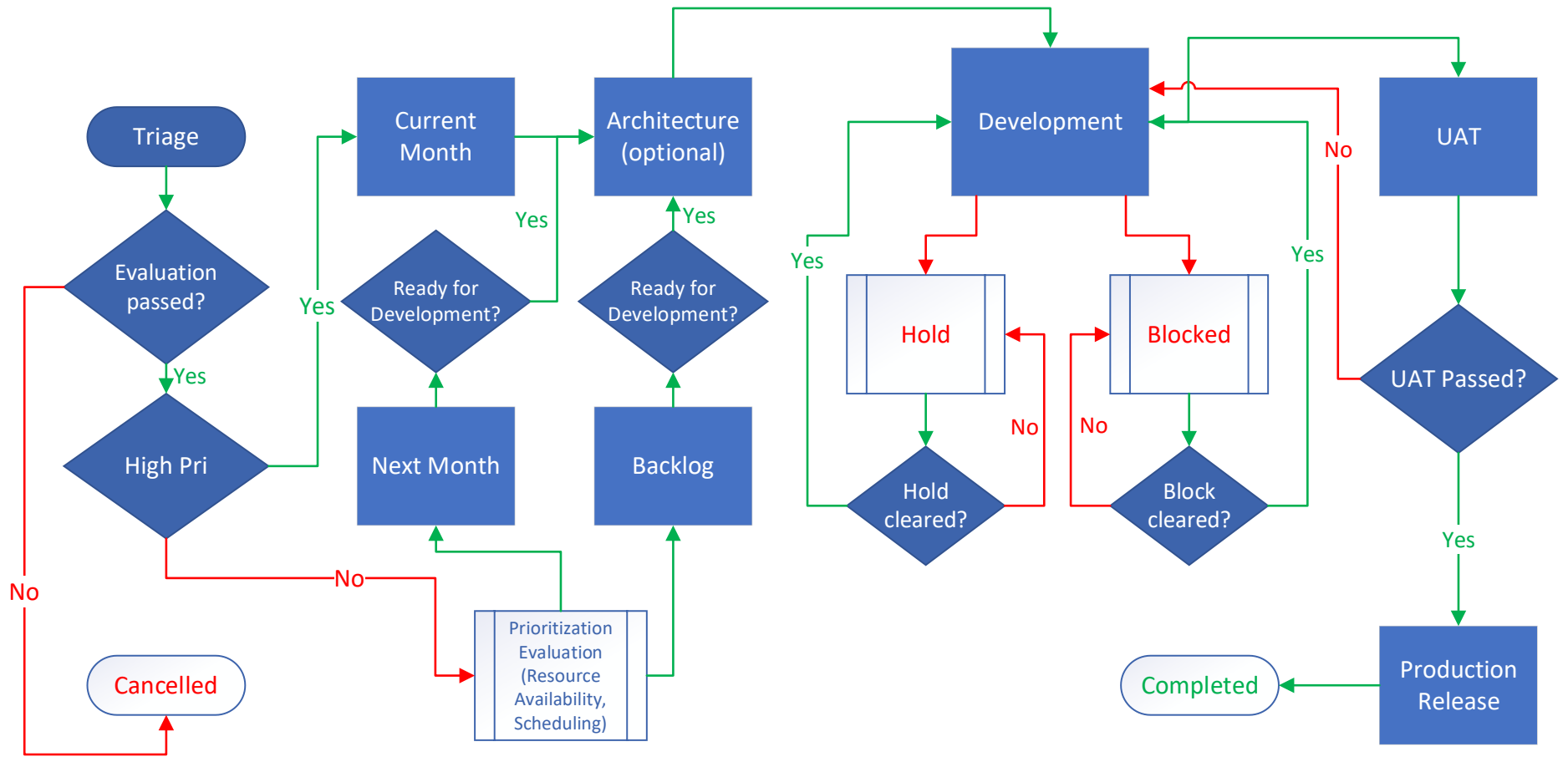## 4.1.4.1 New Move Add Change (MAC) Process Diagram

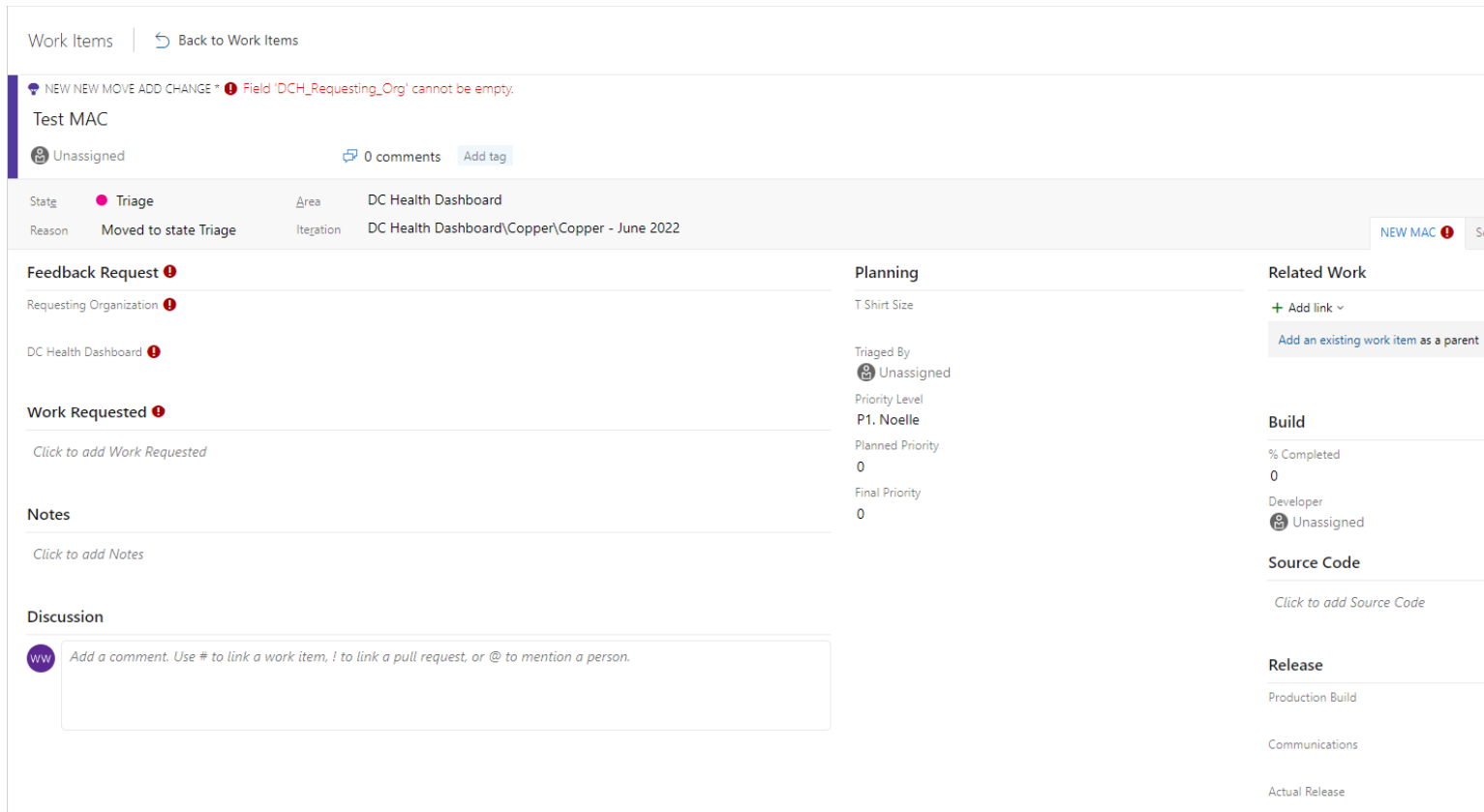FIGURE 4.1.4.1. NEW MAC PROCESS DIAGRAM

FIGURE 4.1.4.2. ADO NEW MAC SCREEN SHOT

4.1.4.2 New Move Add Change (MAC) State Matrix

NOTE: During the development cycle the data fields in the ADO Work Item should be updated with any new information, changes to existing information, and any other relevant data applicable to the Work Item. Every field can be edited after the Work Item is generated in ADO.

NOTE: ADO Work Items should be kept in an inactive state (Backlog, In Progress – Hold, or Blocked for example) unless they are being actively prosecuted. The rule of thumb is to keep only one (1) Work Item in In Progress – Development state at a time.

State	Definition	Responsible Owner	Required Fields- New Move Add Change (MAC)	Exit Criteria
Triage	Initial stage of a New Move Add Change (MAC) Work Item	Program Manager	• Title • Area • Iteration • Requesting Organization • DC Health Dashboard • Work Requested • Work Notes • Target Release • T Shirt Size • Triaged By • Priority Level • Planned Priority • Developer • State	Requested Move Add Change (MAC) has been evaluated and prioritized to move into Backlog, Next Month, or Current Month

State	Definition	Responsible Owner	Fields Requiring Updates by State	Exit Criteria
Backlog	Signifies the MAC is not currently being actively worked but has not been cancelled	Program Manager	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Change in MAC status from Backlog to Next Month [or] Current Month
Next Month	Signifies development of the new MAC is	Program Manager	• Discussion • Work Notes • % Completed	Change in MAC status from Next Month to Current Month

	planned to begin in the next month		• State • Reason • Others if changes/updates apply	
Current Month	Signifies development of the new MAC is planned to begin in the current month	Program Manager	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Change in MAC status from Current Month to Architecture
Architecture	Signifies basic requirements of the new MAC are being mapped out	Program Manager Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	MAC data modeling and queries reviewed for optimization
Development-In Progress	Signifies development of the new MAC is underway	Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Development is completed and MAC is ready for UAT
Development-Hold	Signifies development of the new MAC is on hold for	Developer	• Discussion • Work Notes • % Completed • State	Development hold cleared and MAC is ready for UAT

	DCS-BI internal reasons		• Reason • Others if changes/updates apply	
Blocked	Signifies development of the new MAC is blocked due to outside dependencies	Program Manager Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Block resolved and MAC is ready for UAT
UAT	User Acceptance Testing- signifies the new MAC is in test, either by the requesting business [or] by a larger group of testers	Requesting personnel Developer	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Completion of UAT of the MAC by Customer/Users with passing evaluation and MAC is deemed ready for release to production. *NOTE: Based on UAT feedback, MAC may go back to Development*
Completed	Signifies the new MAC is completed and in production	Program Manager	• Discussion • Work Notes • % Completed • State • Reason • Others if changes/updates apply	Production release of MAC completion and documentation completion
Cancelled	Signifies the new MAC was cancelled and	Program Manager	• Discussion • Work Notes	If MAC does not pass initial evaluation based on the justification

	the reason[s] why it was cancelled are provided		% Completed - State - Reason - Others if changes/updates apply	provided, the MAC may be cancelled

4.1.5 Creating Folders for ADO Work Items in SharePoint

Each Work Item created in ADO should have a corresponding folder in SharePoint. Any documentation associated with the Work Item should be placed in that associated folder.

Once a file is ready for placement on SharePoint it should be saved to a folder in the DCS BI > General > Development > Current - Development and stored in a folder.

That folder should be named beginning with the Azure Development Operations (ADO) Work Item number and the description used in ADO for the Work Item.

Example: DCS BI > General > Development > Current - Development > 184042 – Working Out of SharePoint Folders.
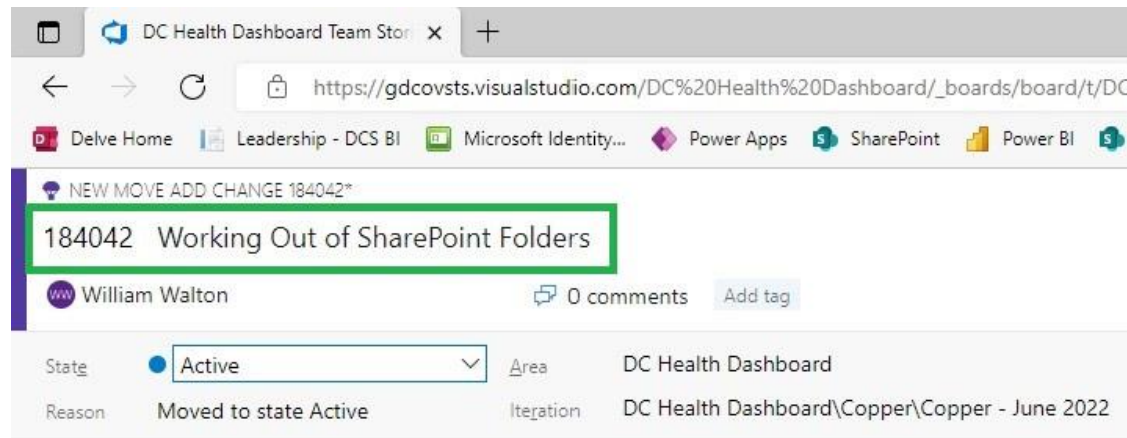

FIGURE 4.1.5.1. ADO WORK ITEM NUMBER AND TITLE FOR THIS WORK ITEM.
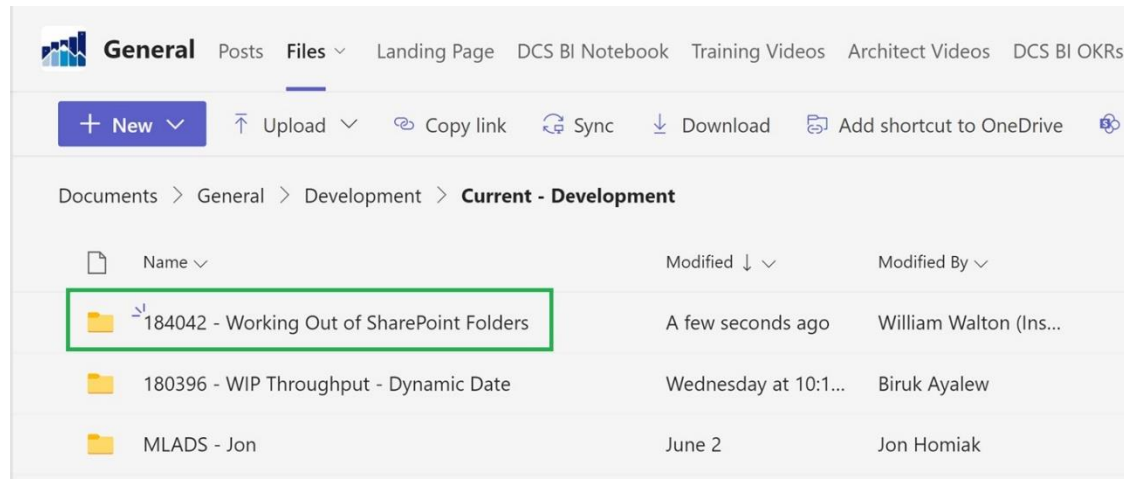
FIGURE 4.1.5.2. NEW FOLDER FOR A NEW DOCUMENT IN THE DCS BI > GENERAL > DEVELOPMENT > CURRENT – DEVELOPMENT FOLDER.
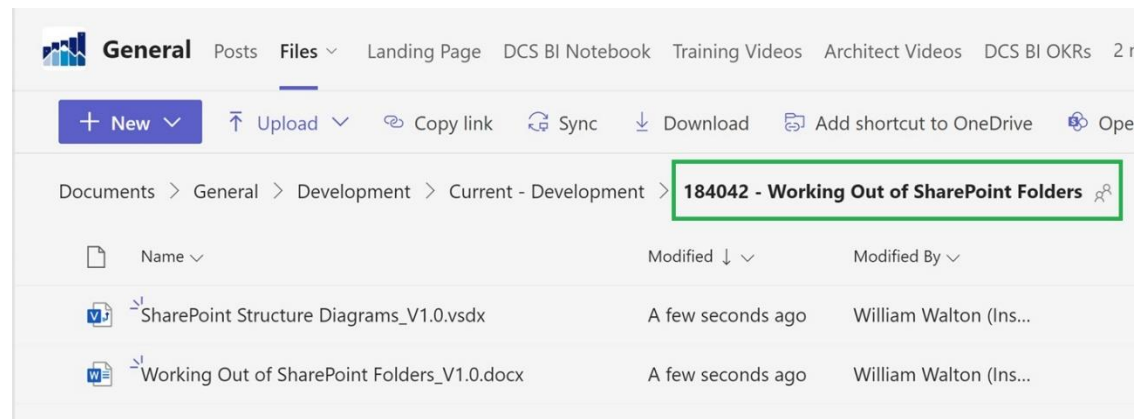

FIGURE 4.1.5.3. FILES SAVED INSIDE THE DCS BI > GENERAL > DEVELOPMENT > CURRENT – DEVELOPMENT > 184042 – WORKING OUT OF SHAREPOINT FOLDERS FOLDER.

Once the folder structure is created in SharePoint and the pertinent file(s) are saved to that folder, from that point forward the files should only be opened and edited from SharePoint.

5 Appendix

5.1 User Interface Field Reference (required fields*)

Field Name	Definition	Field Type	Work Item Type(s)	Notes
Actual Release	Specifies the actual date on which the Work Item was released as to Production as Live	Calendar Date selection box	MAC, Bug	
Additional Notes	Used to add notes to the Work Item as it progresses through the process	Rich Text entry field	Bug	
Area	Specifies the Area (Dashboard) responsible for the Work Item	Drop down selection field	All	
Assigned To	Specifies the person to whom the Work Item is currently assigned	Drop down selection field	All	Under Work Item Title in Menu Bar
Bug Description	Specifies the specific nature of the bug	Rich Text entry field	Bug	Be as descriptive as possible
Bug Severity	Specifies the severity of the bug	Drop down selection field	Bug	0-5
Change and Adoption	Specifies the change and adoption status of the Work Item	Drop down selection field	Feature	Yes [or] No
Communications Sent	Specifies the communications sent status of the Work Item	Drop down selection field	All	Yes [or] No
Data Filters	Specifies any data filters associated with the Work Item	Rich Text entry field	Feature	
Data Source	Specifies the source of the data used for the new feature	Rich Text entry field	Feature	
DC Health Dashboard	Specifies the DC Health Dashboard associated with the Work Item	Drop down selection field	All	
Developer	Specifies the developer assigned to the Work Item	Drop down selection field	All	
Discussion	Used to add discussion between Team members about the Work Item as it progresses through the process	Rich Text entry field	All	
Feature Type	Specifies the type of feature being requested	Drop down selection field	Feature	Configuration, New Build, New Federation

Filters	Specifies any filters associated with the Work Item	Rich Text entry field	Feature	
Final Priority	Specifies the actual priority of the Work Item	Drop down selection field	Feature, MAC	0-20
Iteration	Specifies the Iteration of the Work Item	Drop down selection field	All	Organized by DC Health Dashboards aligned by Fiscal Years (FYs)
Justification	Specifies the justification for the new feature	Rich Text entry field	Feature	
Metric/KPI/OKR/Definitions and Target	Specifies the Metric and/or the Key Performance Indicator (KPI) and/or the Objective and Key Result (OKR) Definition, and/or the Target(s) for the new feature	Rich Text entry field	Feature	
Notes	Used to add notes to the Work Item as it progresses through the process	Rich Text entry field	MAC	
Percent [%] Completed	Specifies the percentage of completion for the Work Item	Drop down selection field	All	0-100 in increments of 10
Persona	Specifies the category of the person requesting the new feature	Drop down selection field	Feature	Campus, Colocation, Executive/Global, Regional/Standards, Site
Personas Affected	Specifies the category of the person affected when requesting the new feature	Rich Text entry field	Feature	
Planned Priority	Specifies the planned priority of the Work Item	Drop down selection field	Feature, MAC	0-20
Planned Release	Specifies the actual date on which the Work Item was released as Live	Calendar Date selection box	MAC, Bug	MM/DD/YYYY format with default date of 12:00 AM
Priority Level	Specifies the priority (and visibility level) of the Work Item	Drop down selection field	All	Default setting is P1. Select P3 unless visibility is required above the DCS-BI level.
Problem Statement	Specifies the problem the requested feature is meant to resolve	Rich Text entry field	Feature	
Production Build	Specifies the production build status of the Work Item	Drop down selection field	All	Yes [or] No
Production Release	Specifies the date on which the new feature was released	Calendar Date	Feature	MM/DD/YYYY format

	to production	selection box		with default date of 12:00 AM
Proposed Solution	Specifies the proposed solution path for the problem the feature is meant to resolve	Rich Text entry field	Feature	
Reason	Specifies the reason for any changes to the State of the Work Item	Drop down selection field	All	
Requesting Organization	Specifies the organization requesting feedback about the Work Item	Drop down selection field	All	
Source Code	Used to attach any source code to the Work Item	Rich Text entry field	MAC	
SQL [or] Source Code	Used to attach and SQL code [or] Source Code to the Work Item	Rich Text entry field	Bug, Feature	
State	Specifies the initial state of the Work Item at the time of its creation	Drop down selection field	All	
Steps to Reproduce	Specifies the steps required to reproduce the bug	Rich Text entry field	Bug	
T Shirt Size	Specifies the T Shirt size (the expected amount of time required to complete) a single Work Item (S) Small- a Work Item that requires minimal effort (M) Medium- a Work Item that requires effort (L) Large- a Work Item that requires additional effort and planning (XL) Extra Large- a Work Item that requires dedicated effort and planning (XXL) Extra Extra Large- a Work Item that requires dedicated effort and planning for a sustained period	Drop down selection field	All	- S= 1-12 PM hours [or] 1 to 2 days - M= 13-30 PM hours [or] 3-5 days] - L= 31-60 PM hours [or] 6-10 days - XL= 61-120 PM hours [or] 10-20 days - XXL= 121-180 PM hours [or] 20-30 days
Title	Specifies the title of the Work Item	Text entry field	All	
Triaged By	Specifies the person who first reviewed the Work Item	Drop down selection field	All	
Usage Scenario	Specifies the usage scenario for the new feature	Rich Text entry field	Feature	
User Facing Artifacts	Specifies any User-Facing artifacts associated with the new feature	Rich Text entry field	Feature	
Work Notes	Specifies the any internal DCS-BI notes pertaining to the	Rich Text entry field	All	Should be updated

	Work Item			whenever relevant new information is captured
Work Requested	Specifies the work required to complete the Work Item	Rich Text entry field	MAC	Include specifics about the individual parts of the work required when multiple steps [or] changes are requested

5.2 Glossary

Term/Acronym	Definition
ADO	**A**zure **D**evelopment **O**perations
Alias	Microsoft email address
Ally.io	OKR Management software package
API	**A**pplication **P**rogram **I**nterface
CO+I	**C**loud **O**perations + **I**nnovation
DCS-BI	**D**ata **C**enter **S**ervices- **B**usiness **I**ntelligence. AKA DCSBI
FY	**F**iscal **Y**ear
High Pri	**High Pri**ority
MAC	**M**ove **A**dd **C**hange
Max Hours	This is the estimated maximum (Max) hours it would take to complete a Work Item end to end. The dedicated time could span multiple business days. This is the time spent on the Work Item itself.
Min Hours	This is the estimated minimum (Min) hours it would take to complete a Work Item end to end. The dedicated time could span multiple business days. This is the time spent on the Work Item itself.
OKR	**O**bjective [and] **K**ey **R**esult
PM Hours	**P**roject **M**anagement Hours- The number of hours that a Project Manager will be dedicated to managing a single Work

	Item. This work consists of gathering requirements, scheduling meetings, removing blocking items, and organizing deployment. The dedicated time could span multiple business days. This is the time spent on the Work Item itself. Overhead Ratio has been locked at 28% of the Development Time in line with common industry standards. See Min Hours [and] Max Hours
POC	**P**oint **O**f **C**ontact
PPE	**P**re-**P**roduction **E**ngineering
Prod	**Prod**uction
QSG	**Q**uick**S**tart **G**uide
SLA	**S**ervice **L**evel **A**greement
UAT	**U**ser **A**cceptance **T**esting
UG	**U**ser **G**uide

5.3 Interface Navigation

5.3.1 Menu bar
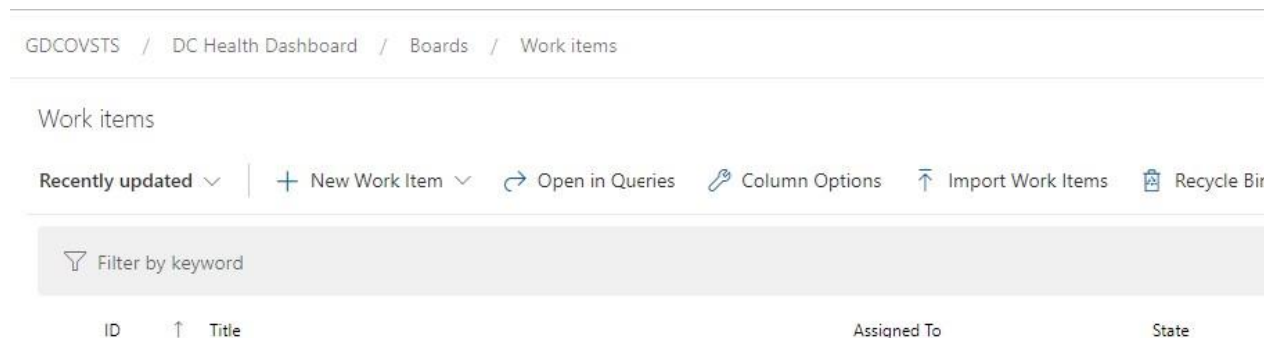
FIGURE 5.2.1. MENU BAR

[Usage instructions here]

5.3.2 Other

[screen shot here]

[Usage instructions here]

5.4 Document Conventions

- Mouse clicks are performed with the left mouse button unless otherwise instructed.

- Variables are [bracketed].

- Notes are *italicized*.

- Buttons, zones, and items to be clicked on are boxed.
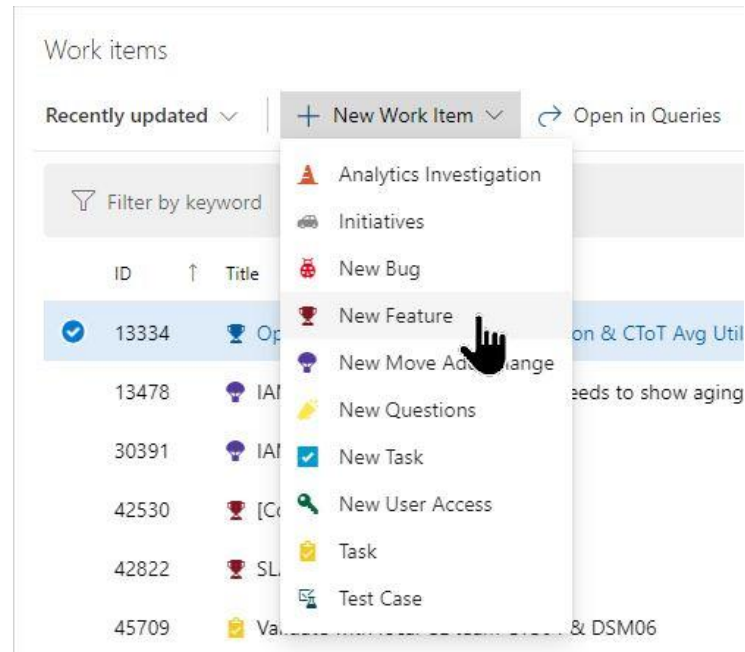
5.5 Controls

5.5.1 Drop down selection field

FIGURE 5.5.1. DROP DOWN SELECTION FIELD

Click the down caret on the right side of the field to reveal the selectable options, then click the [desired option] to select it.
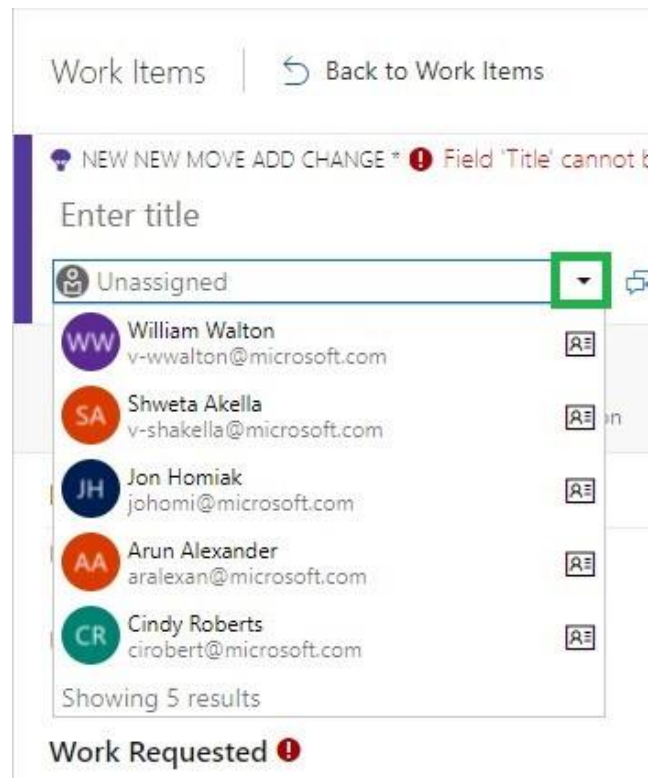
5.5.2 Searchable lookup field

Click the search icon to reveal the selectable options, then click the [desired option] to select it.
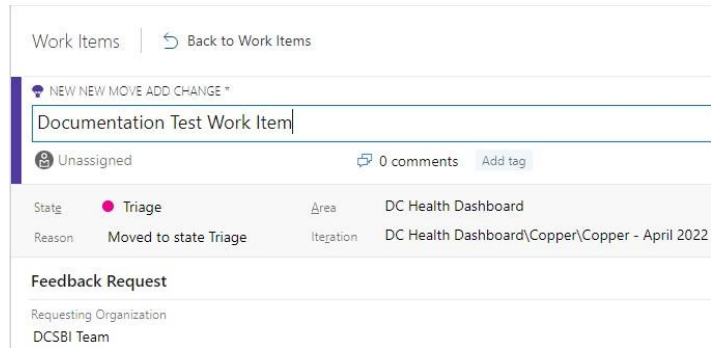
5.5.3 Text entry field

FIGURE 5.5.3. TEXT ENTRY FIELD

Click the data entry field then enter the desired [text data].
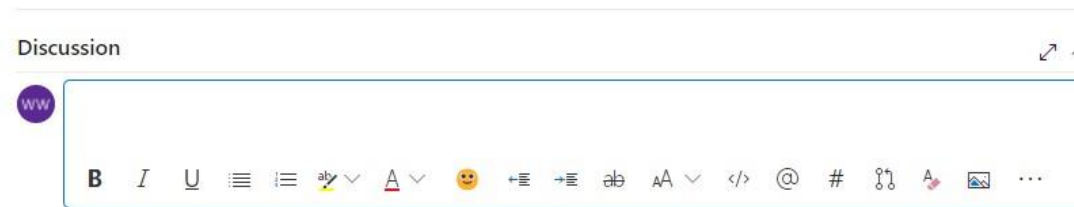
5.5.4 Rich text entry field

FIGURE 5.5.4. RICH TEXT ENTRY FIELD

Click the rich text entry field then enter the desired [rich text data].
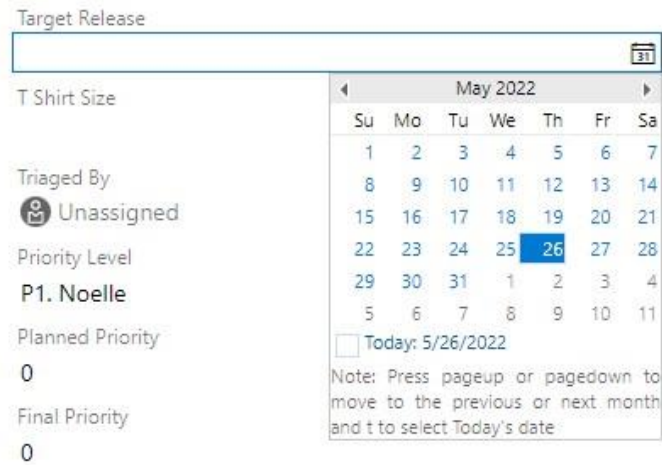
5.5.5 Calendar date selection box

FIGURE 5.5.5. CALENDAR DATE SELECTION BOX

Click the calendar icon to reveal the date selection dialog box, then click the [desired option(s)] to select them.