

Agile workflow in Azure Boards

Article 06/02/2023 12 contributors

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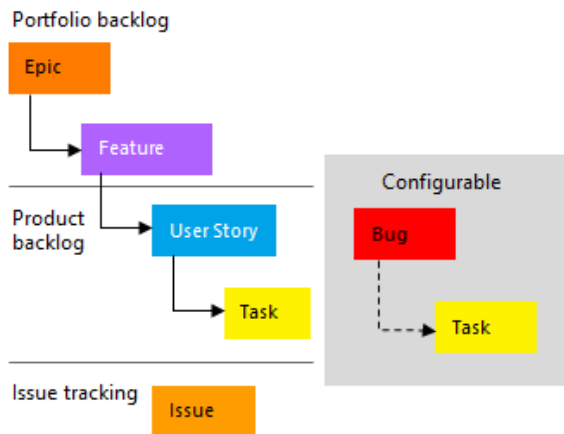
Track progress

Map user stories to features

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Azure DevOps Services | Azure DevOps Server 2022 - Azure DevOps Server 2019 | TFS 2018

When you use the Agile process in Azure Boards, the following work item types (WITs) help your team to plan and track progress of your projects: epics, features, user stories, tasks, issues/bugs. Once you define your WITs, you can use the Kanban board to track progress by updating the status of those items.



To gain insight into a portfolio of features, scenarios, or user experiences, product owners and program managers map **user stories** to **features**. When a team works in sprints, they define **tasks** that automatically link to user stories. If you're new to the Agile process, review the section [Plan and track work with Agile to get started](#).

From the web portal or Microsoft Test Manager, testers can create and run test cases against **bugs and issues**, which are used to track code defects and blocking issues.

Define user stories

Product owners typically define and stack rank user stories, which describe the work involved for developing applications, requirements, and elements. The team then estimates the effort and work to deliver the highest priority items.

Create user stories from the quick add panel on the product backlog page. From that page, you can also drag-and-drop items to reorder them or map them to features.

USER STORY 209

209 Slow response on information form

Jamal Hartnett

0 Comments

Add Tag

State

New

Area

Fabrikam Fiber\Web

Reason

New

Iteration

Fabrikam Fiber\Release 2\Sprint 1

Details

Scans

0

0

Description

Click to add Description.

Acceptance Criteria

Click to add Acceptance Criteria.

Discussion

CC

Add a comment. Use # to link a work item, @ to mention a person, or ! to link a pull request.

Planning

Story Points

Priority

2

Risk

Classification

Value area

Business

Deployment

To track releases associated with this work item, go to [Releases](#) and turn on deployment status reporting for Boards in your pipeline's Options menu. [Learn more about deployment status reporting](#)

Development

Add link

Link an Azure Repos [commit](#), [pull request](#) or [branch](#) to see the status of your development. You can also [create a branch](#) to get started.

Related Work

Add link

Add an existing work item as a parent

You can open each user story to provide more details and estimate the story points. Define **Story Points** so your team can use the forecast feature and velocity charts to estimate future sprints or work efforts. By prioritizing the user stories on the backlog page (that's captured in the Stack Rank field), product owners can indicate which items should be given higher priority.

Use the guidance in the following table and the common fields used across work item types when you complete the form.

| Field/tab | Usage |
|---------------------|--|
| Description | For user stories, provide enough detail for estimating how much work is required to implement the story. Focus on who the feature is for, what users want to accomplish, and why. Don't describe how the feature should be developed. Do provide sufficient details so that your team can write tasks and test cases to implement the item. |
| Acceptance Criteria | Provide the criteria to be met before the bug or user story can be closed. Before work begins, describe the customer acceptance criteria as clearly as possible. Conversations between the team and customers to define the acceptance criteria help ensure that your team understands your customers' expectations. You can use the acceptance criteria as the basis for acceptance tests to more effectively evaluate whether an item is satisfactorily completed. |
| Value Area | The area of customer value addressed by the epic, feature, requirement, or backlog item. Values include: <ul style="list-style-type: none">Architectural: Technical services to implement business features that deliver solutionBusiness: Services that fulfill customers or stakeholder needs that directly deliver customer value to support the business (Default) |
| Story Points | Estimate the amount of work required to complete a user story using any numeric unit of measurement your team prefers. Agile velocity charts and forecast tools reference the values in this field. For more information, see the Estimating white paper. |

| | |
|----------|--|
| Priority | <p>A subjective rating of the user story, feature, or requirement as it relates to the business. Allowed values are:</p> <ul style="list-style-type: none"> • 1: Product can't ship without the feature. • 2: Product can't ship without the feature, but it doesn't have to be addressed immediately. • 3: Implementation of the feature is optional, based on resources, time, and risk. |
| Risk | <p>A subjective rating of the relative uncertainty around the successful completion of a user story. Allowed values are:</p> <ul style="list-style-type: none"> • 1 - High • 2 - Medium • 3 - Low |

Capture comments in the Discussion section

Use the **Discussion** section to add and review comments made about the work being performed.

Discussion



Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.



Jamal Hartnett commented just now

@Christie Church - Assigning this to you



Christie Church commented less than a minute ago

I've updated the storyboard per our discussions yesterday.



Helena Petersen commented 9 minutes ago

@Christie Church, @Jamal Hartnett - Let's do an A/B test on the colors used in the form.



Jamal Hartnett commented 21 hours ago

Make sure the standards guidelines are written in a similar manner to those done for account setup.

The rich text editor tool bar displays below the text entry area. It appears when you select each text box that supports text formatting.

Discussion



@Jamal Hartnett note that this work item is dependent on [Product Backlog Item 358: Research architecture changes](#)



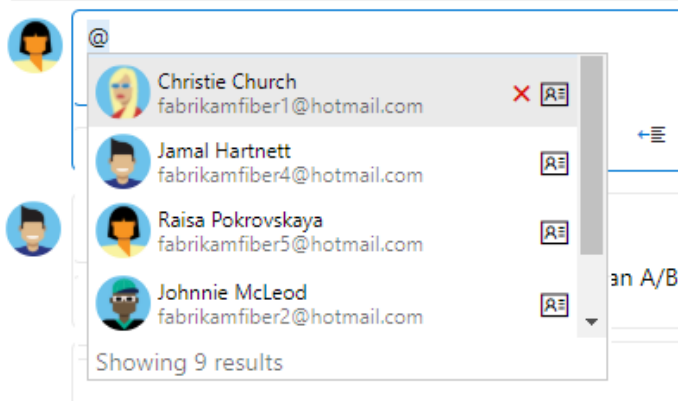
Note

There isn't a **Discussion** work item field. To query work items with comments entered in the Discussion area, you filter on the **History field**. The full content of the text entered into the Discussion text box is added to the History field.

Mention someone, a group, work item, or pull request

To open a menu of recent entries you've made to mention someone, link to a work item, or link to a pull request, select # or 📌, or enter @, #, or !.

Discussion



Enter a name or number and the menu list filters to match your entry. Choose the entry you want to add. To bring a group into the discussion, enter @ and the group name, such as a team or security group.

Edit or delete a comment

To edit or delete any of your discussion comments, choose **Edit** or choose the **...** actions icon, and then choose **Delete**.

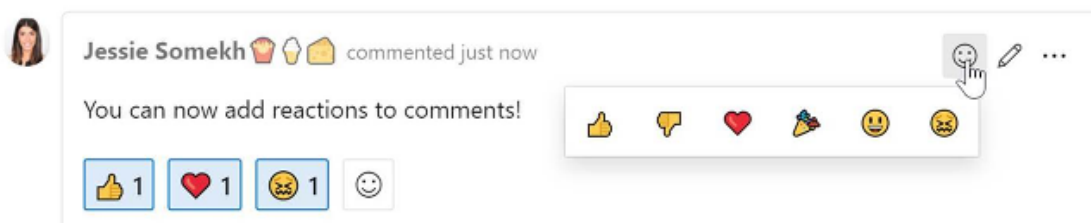


After updating the comment, choose **Update**. To delete the comment, confirm that you want to delete it.

A full audit trail of all edited and deleted comments is maintained in the **History** tab on the work item form.

Add a reaction to a comment

Add one or more reactions to a comment by choosing a smiley icon at the upper-right corner of any comment. Or, choose from the icons at the bottom of a comment next to any existing reactions. To remove your reaction, choose the reaction on the bottom of your comment. The following image shows an example of the experience of adding a reaction and the display of reactions on a comment.



Save a comment without saving the work item

Note

This feature is available starting in Azure DevOps Server 2022.1.

If you only have permissions to add to the **Discussion** of a work item, then you can do so by saving comments. This permission is controlled by Area Path nodes and the **Edit work item comments in this node** permission. For more information, see [Set work tracking permissions](#), [Create child nodes](#), [modify work items under an area or iteration path](#).

Once you save the comments, you don't need to save the work item.

Discussion

Note

When you save changes made to the **Discussion** control, only the comment is saved. No **work item rules** defined for the work item type execute.

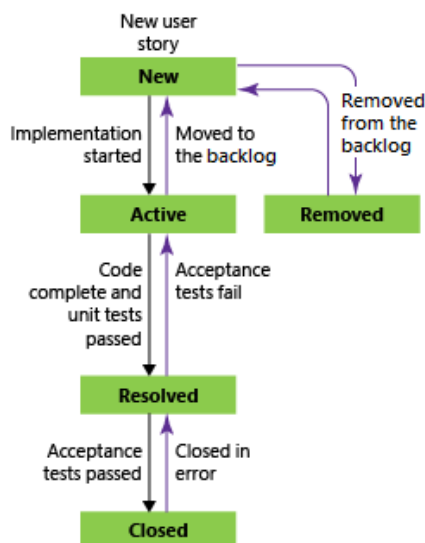
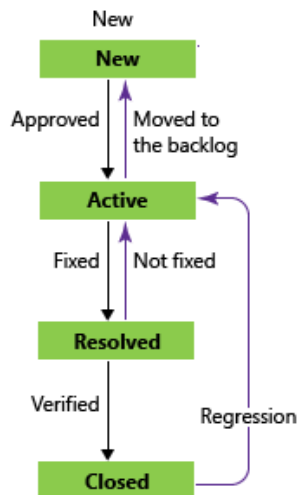
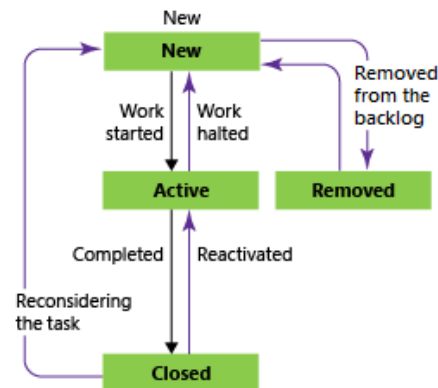
Track progress

As work progresses, you change the State field to update the status. Optionally, you can specify a reason. The state and reason fields appear on the work item form in the header area.

Agile workflow states

When you update the workflow, teams know which items are new, in progress, or completed. Most WITs support transition both forward and backward from each workflow state. These diagrams show the main progression and regression states of the user story, bug, and task WITs.

[Expand table](#)

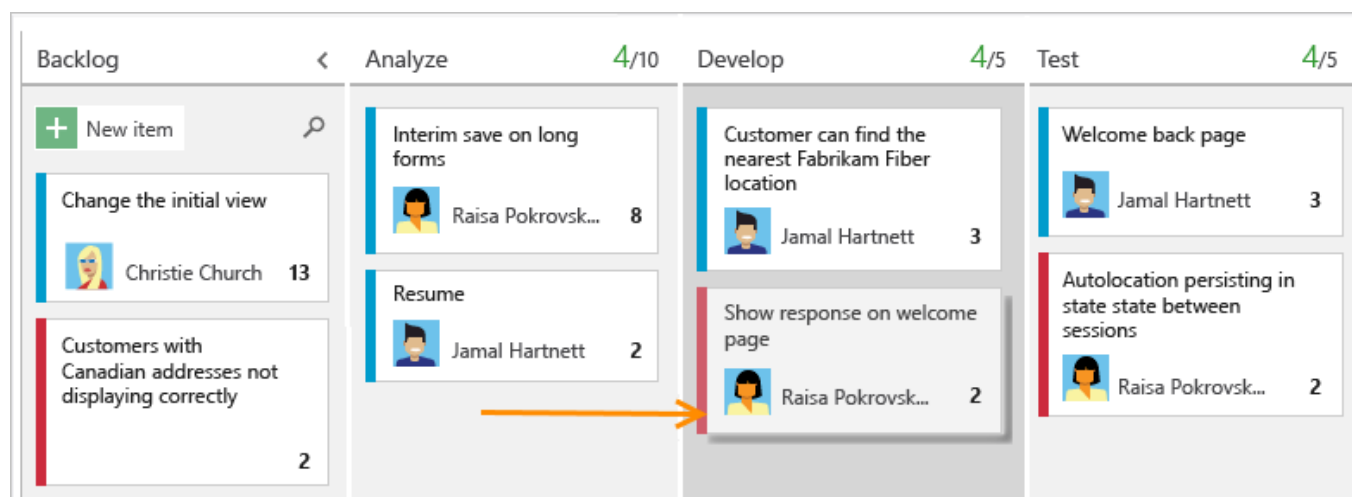
User Story**Bug****Task**

A typical workflow progression for a user story follows:

- The product owner creates a user story in the **New** state with the default reason, **New user story**.
- The team updates the status to **Active** when they decide to complete the work during the sprint.
- A user story gets moved to **Resolved** when the team has completed all its associated tasks and unit tests for the story pass.
- A user story gets moved to the **Closed** state when the product owner agrees that the story has been implemented according to the Acceptance Criteria and acceptance tests pass.

Update status with Kanban or Taskboards

Teams can use the Kanban board to update the status of requirements, and the Taskboard to update the status of tasks. Dragging items to a new state column updates both the State and Reason fields.



You can customize the Kanban board to support more swimlanes or columns. For more information, see [Customize your work tracking experience](#).

Map user stories to features

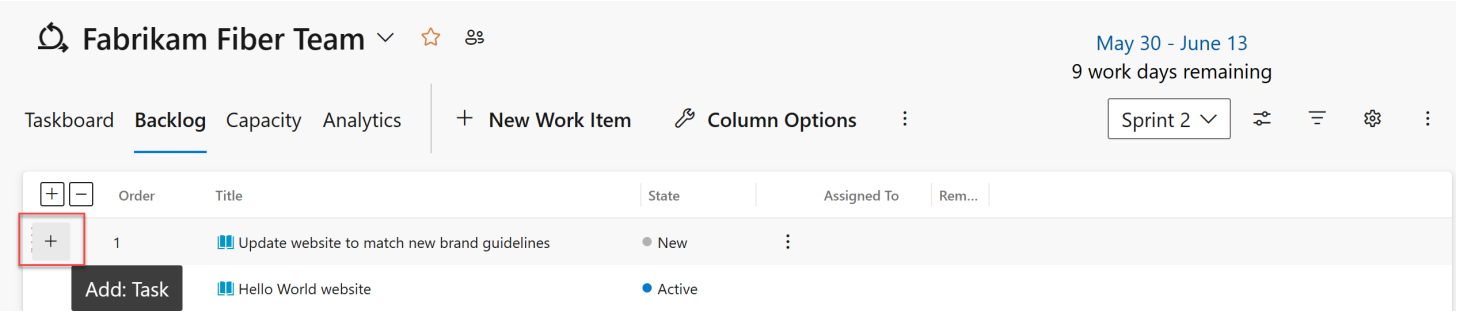
When you manage a suite of products or user experiences, you might want to view the scope and progress of work across the product portfolio. You can view the scope and progress of work by defining features and mapping user

stories to features.

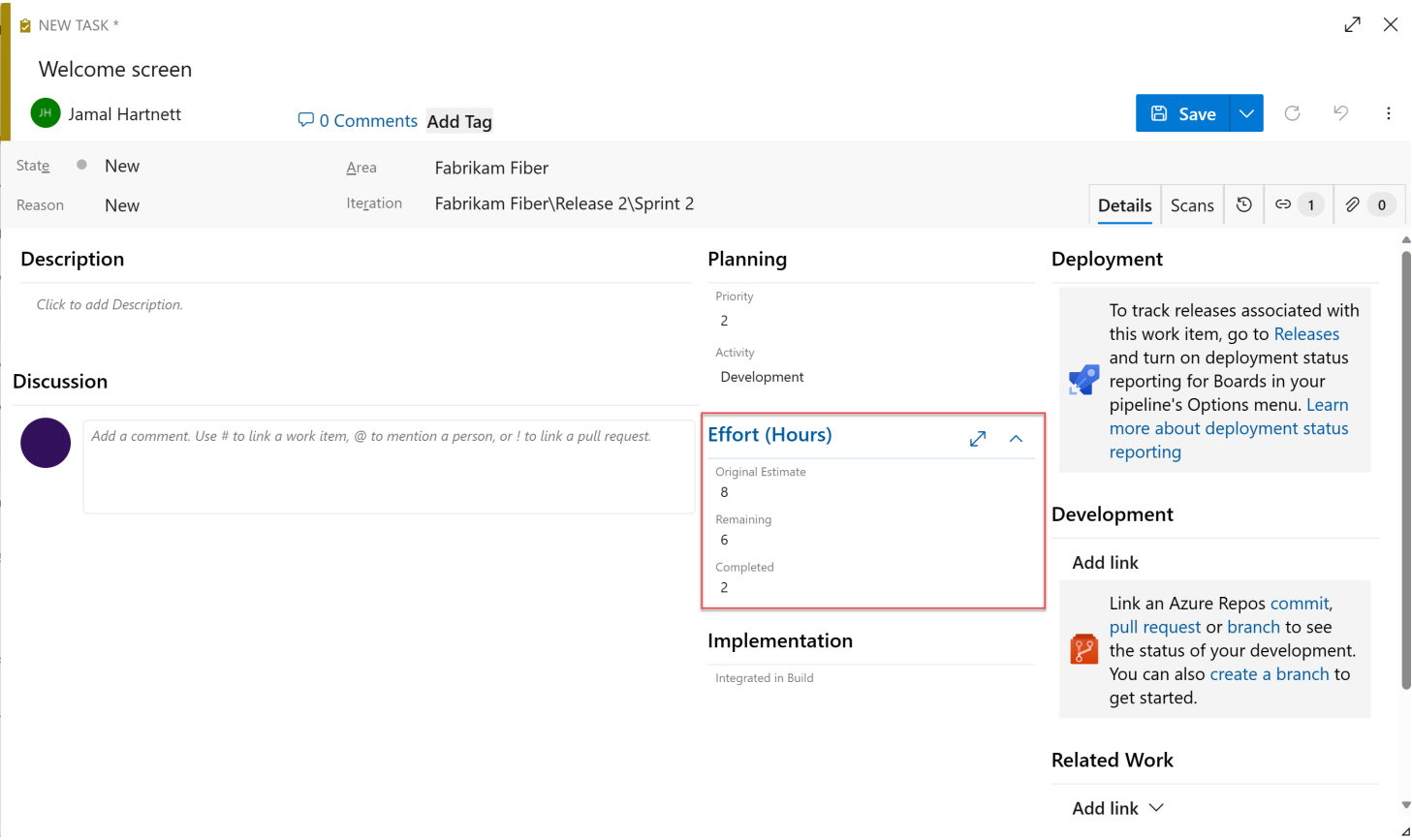
Using portfolio backlogs, you can drill down from one backlog to another to view the level of detail you want. Also, use portfolio backlogs to view a rollup of work in progress across several teams when you setup a hierarchy of teams.

Define tasks

When your team manages their work in sprints, they can use the sprint backlog page to break down the work to be accomplished into distinct tasks.



Name the task and estimate the work it takes.



When you use the Agile process, teams forecast work and define tasks at the start of each sprint. Each team member then performs a subset of those tasks. Tasks can include development, testing, and other kinds of work. For example, a developer defines tasks to implement user stories, and a tester defines tasks to write and run test cases.

When teams estimate work using hours or days, they define tasks and the **Remaining Work** and **Activity** (optional) fields.


| Field/tab | Usage |
|-----------|-------|
|-----------|-------|

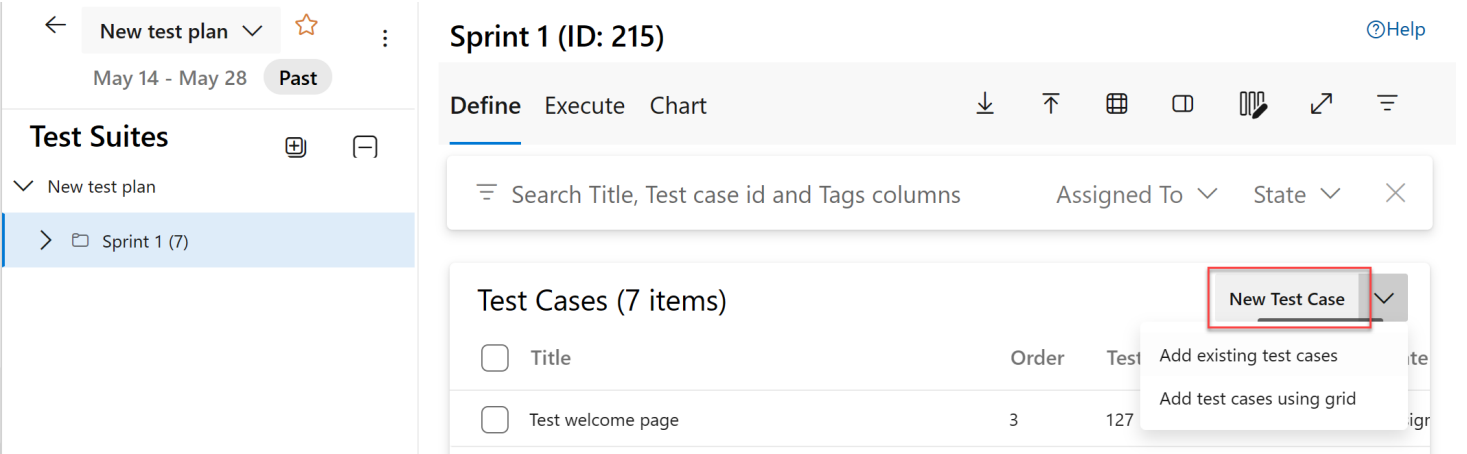
| | |
|---------------------|---|
| Original Estimate | The amount of estimated work required to complete a task. Typically, this field doesn't change after it's assigned. You can specify work in hours or in days. There are no inherent time units associated with this field. |
| Remaining Work | The amount of work remaining to complete a task. As work progresses, update this field. This field is used to calculate capacity charts, the sprint burndown chart, and the following SQL Server reports: Burndown and Burn Rate, Remaining Work, and Status on All Iterations. If you divide a task into subtasks, specify hours for the subtasks only. You can specify work in any unit of measurement your team chooses. |
| Completed Work | The amount of work spent implementing a task. |
| Activity | Select the type of activity this task represents when your team estimates sprint capacity by activity. |
| Integrated in Build | Product build number that incorporates the code or fixes a bug. |

Track test progress

Track testing progress with user stories and code defects.

Test user stories

From the web portal or Test Manager, you can create test cases that automatically link to a user story or bug. Or, you can link a user story to a test case from the  **Links** tab.



The test case contains multiple fields, many of which are automated and integrated with Test Manager and the build process. For a description of each field, see Query based on build and test integration fields.

Work Items

Back to Work Items

TEST CASE 214*

214 Test coverage map UI

Jamal Hartnett

0 Comments

Add Tag

Save

Follow

State

Ready

Area

Fabrikam Fiber

Reason

Completed

Iteration

Fabrikam Fiber\Release 2\Sprint 2

Steps

Summary

Associated Automation

Scans

1

0

Development

Add link

Link an Azure Repos commit, pull request or branch to see the status of your development. You can also create a branch to get started.

Related Work

Add link

Add an existing work item as a parent

Tests

213 Welcome screen

Updated 5m ago

New

Status

Priority

2

Automation status

Not Automated


Steps

Click or type here to add a step

Parameter values

Discussion




Add a comment. Use # to link a work item, @ to mention a person, or ! to link a pull request.

The  (links tab) captures the links to user stories and bugs in a test case. By linking user stories and bugs to test cases, the team can track the progress made in testing each item. By defining these links, you support information that appears in the Stories Overview Report report.

Track code defects

You can create bugs from the web portal, Visual Studio, or when testing with Test Manager.

Definitions for common work tracking fields




The following fields and tabs appear in most work items. Each tab gets used to track specific information, such as 
History,  **Links**, or  **Attachments**. These three tabs provide a history of changes, view of linked work items, and ability to view and attach files.

The only required field for all work item types is **Title**. When you save a work item, the system assigns it a unique **ID**. The form highlights required field in yellow. For information about other fields, see Work item field index.

Note

Additional fields may be required depending on customizations made to your process and project.

| Field/tab | Usage |
|-------------|---|
| Title | Enter a description of 255 characters or less. You can always modify the title later. |
| Assigned To | Assign the work item to the team member responsible for performing the work. |

| | |
|--|--|
| State | When the work item is created, the State defaults to the first state in the workflow. As work progresses, update it to reflect the current state. |
| Reason | Use the default first. Update it when you change state. Each State is associated with a default reason. |
| Area | Choose the area path associated with the product or team, or leave blank until assigned during a planning meeting. To change the dropdown list of areas, see Define area paths and assign to a team. |
| Iteration | Choose the sprint or iteration in which the work is to be completed, or leave it blank and assign it later, during a planning meeting. To change the drop-down list of iterations, see Define iteration paths (sprints) and configure team iterations. |
|  (History) | <p>Review the audit trail that the system captures and capture additional information.</p> <p>Every time that the work item is updated, information is appended to the history. History includes the date of the change, who made the change, and which fields were changed. You can also add formatted text to the history field.</p> |
|  (Links) | <p>Add all types of links, such as hyperlinks, changesets, source files, and so on.</p> <p>This tab also lists all links defined for the work item.</p> |
|  (Attachments) | Share more detailed information by adding files to the work item, such as email threads, documents, images, log files, or other file types. |

Customize work item types

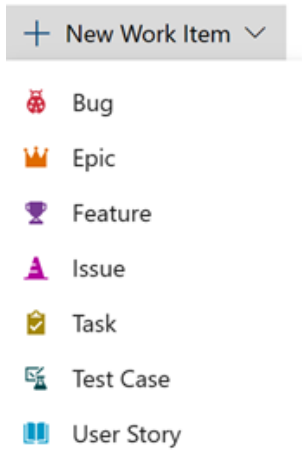
For most work item types, you can add fields, change the workflow, add custom rules, and add custom pages to the work item form. You can also add custom work item types. For more information, see [Customize an inheritance process](#).

Related articles

- [Create a project](#)
- [Add work items to manage a project](#)
- [Create a backlog](#)
- [Use a Kanban board](#)
- [Plan a sprint](#)

Track issues

Issues are used to track events that may block progress or shipping a user story. Bugs, on the other hand, are used to track code defects. You can add an issue from the New work item widget added to a team dashboard, or from the **New** menu on the Queries page.



Work items you add from the widget are automatically scoped to your team's default area and iteration paths. To change the team context, see [Switch team context](#).

Track business value

You can use the Priority field to differentiate the value of various stories. Or, you can add a custom field to the User Story WIT that tracks the relative value of stories. To learn how, see [Customize a field for a process](#).

Backlog list order

The Stack Rank field is used to track the relative ranking of user stories, however by default it doesn't appear on the work item form. The sequence of items on the backlog page is determined according to where you've added the items or moved the items on the page. As you drag items, a background process updates this field.