ISIS Mantid Epic flow guidelines

This provides guidelines / rules for how Epics can be moved between different states on the Epic Kanban board.

**Funnel state**: Entry point for all big needs and ideas.

* Note: If uncertain about whether a need/idea is an Epic, alternatively start by exploring your idea in Jira with an Explore item. This gives you a blank sheet from which to start discussions. For example, if a new instrument is planned but there hasn't been any discussion about its software needs, use an Explore item to investigate. Start with the Explore in Funnel and move it to Done once exploration is complete, and Epics may emerge as part of this process.

**Reviewing state**: When an Epic owner with capacity is identified then move Epic from Funnel to Reviewing state and refine the Epic.

**Analysing state**: When the Epic is ready for wider consumption and MPB prioritisation, it can be moved into Analysing state. The product manager checks with Epic owners if Epics are okay to move to Analysing state and seek agreement from the Mantid team lead​

The MPB consider each Epic in this state and make one of the following decisions:

* Move back to Reviewing: If the Epic lacks clarity or key information.
* Move to Ready: If the Epic is deemed valuable and well-understood.
* Move to Done: If the Epic is judged to have insufficient value.
* Conditional Review: The MPB may request specific follow-up work. If completed and no objections are raised within a week (via email), the Epic can move to Ready.

**Ready state**: List of prioritised Epics by the MPB.

* Once all Epics in the Analysing column are cleared, the ones which made it to the Ready state are ready to be prioritised. What we have settled at doing is to defer this to after the Epics in Implementing have been discussed – then do the relative prioritisation across all the Epics in Ready and Implementing.
* An Epic in Ready may be moved to Done if e.g. an instrument upgrade been cancelled and therefore the software needs for it is no longer relevant.
* Note: As of this writing we haven’t seen the need to have separate prioritisations for business and enabler Epics.

**Implementing MVP state and Implementing Persevere state**:

Epics move into Implementing MVP once they can be pulled by the Mantid team.

Team and Epic Owner Process:

* Small deviations from the original Epic goals are OK. In case of radical change, stop work and create an Epic for the new need in Funnel.
* If the Epic Owner, lead Mantid developer, and Mantid team lead agree, the Epic can move to Persevere or stopped.

MPB Process:

* Discuss Epics in Implementing. As relevant with presentations or demos.
* Move Epic back to Ready if it is stopped and likely to remain so until at least the next prioritisation event and the Epic is still deemed valuable.
* Move Epic to Done if it is sufficiently completed or pivoted.
* Move Epic to Persevere if MVP sufficiently complete and outcomes justify moving on to working on the full planned feature set.
* Check Epics moved from MVP to Persevere in between prioritisation events. If the MPB observe significant MVP features that have not been done, move the Epic back to MVP, assuming the Epic is still deemed valuable.

**Done stage**: An Epic moves to Done if sufficiently completed or no longer a concern.

* Note​: For practical reasons, Epics in this state are periodically archived (in Jira, moved to Jira Archive).