

Agile Planning and Portfolio Management with Azure Boards

Overview

In this lab, you will learn about the agile planning and portfolio management tools and processes provided by Azure Boards and how they can help you quickly plan, manage, and track work across your entire team. You will explore the product backlog, sprint backlog, and task boards which can be used to track the flow of work during the course of an iteration. We will also take a look at how the tools have been enhanced in this release to scale for larger teams and organizations.

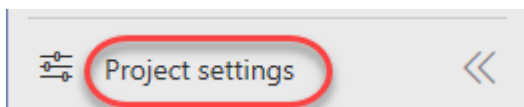
Prerequisites

- This lab requires you to complete task 1 from the prerequisite instructions.

Exercise 1: Agile Project Management

Task 1: Working with teams, areas, and iterations

- Navigate to your Parts Unlimited project on Azure DevOps. It will be something like <https://dev.azure.com/YOURACCOUNT/Parts%20Unlimited>.
- Open the settings page using the **Project settings** navigation located at the bottom left of the page.



- Select the **Teams** tab. There are already a few teams in this project, but you'll make a new one for this lab. Click **New team**.

A screenshot of the 'Project Settings' page in Azure DevOps, specifically the 'Teams' tab. On the left, the 'Teams' option in the sidebar is highlighted with a red box. The main content area shows a table of existing teams. A 'New Team' button is highlighted with a red box in the top right corner of the table area.

Name ↓	Description	Members
PT PartsUnlimited_... Default	The default project team.	1
P PUL	Parts Unlimited Web Team	0
P PUL-DB	PUL DB Team	0

- Use **"PUL-Web"** as the **Team name** and click **Create team**.


Create a new team



Name

PUL-Web

Members

 Add members





Description

Add a description to your team this will appear in the team page

Cancel

Create

5. Select the newly created team to view its details.

Name ↓		Description		Members
	Parts Unlimited Team	Default	The default project team.	1
	PUL		Parts Unlimited Web Team	0
	PUL-DB		PUL DB Team	0
	PUL-Web			1

6. By default, the new team has only you as its member. You can use this view to manage membership, notifications, dashboards, and more. But first you will want to define the schedule and scope of the team. Click **Iterations and Area Paths**.


PUL-Web
Relevant links: [Notifications](#) | [Dashboards](#) | [Iterations and Area Paths](#)

Members Settings

Search users and groups

Total 1

Direct Members Add

<input type="checkbox"/>	Name	Type	Username or scope
<input type="checkbox"/>	 Michelle Admin	aad user	

- Select the **Iterations** tab and click **Select iterations**. This team will use the same iteration schedule that's already in place for the other teams, although you can take a different route if that's better for your organization.

Work This project is currently using the Scrum process. To

General **Iterations** Areas Templates

To manage iterations for the project, navigate to [Project settings](#)

Iterations

Teams plan and track work at regular time intervals, commonly team. [Learn more about customizing areas and iterations](#)

Default iteration ⓘ

@CurrentIteration [Change](#)

Backlog iteration ⓘ

Parts Unlimited [Change](#)

The iterations selected below will appear in the Backlogs hub f manage work.

[+ Select iteration\(s\)](#) [Remove](#) | [New](#) [New child](#)

Iteration

- Select **Parts Unlimited\Sprint 1** and click **Save and close**. Note that this first sprint has already passed. This is because the demo data generator is designed to build out project history so that this sprint occurs in the past.

Select iteration(s)

These iterations will be available on your team's backlog

+ Iteration

[Learn more](#)

Save and close

Cancel

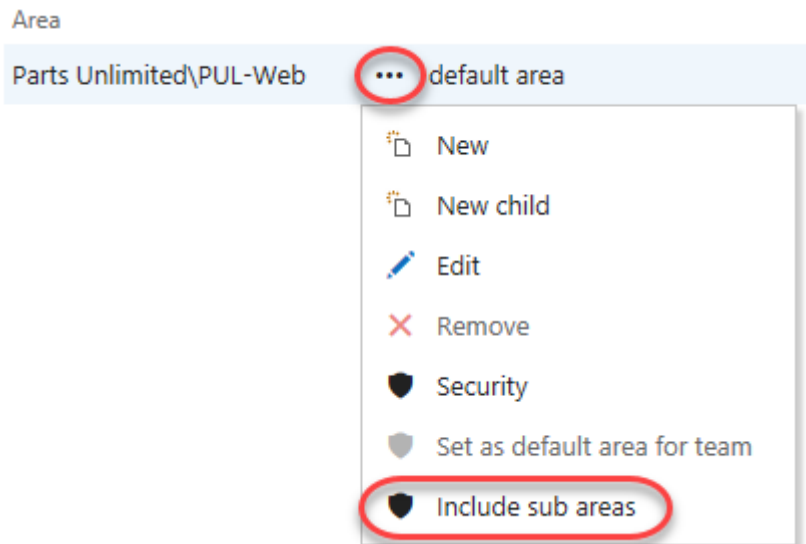
9. Repeat the process to add **Sprint 2** and **Sprint 3**. The second sprint is our current iteration, and the third is in the near future.

<div><div>+ Select iteration(s)</div><div><div>×</div> Remove</div><div>New</div><div>New child</div></div>		
Iteration	Start Date	End Date
Parts Unlimited\Sprint 1	6/30/2019	7/21/2019
Parts Unlimited\Sprint 2	7/22/2019	8/12/2019
Parts Unlimited\Sprint 3	8/13/2019	9/3/2019

10. Select the **Areas** tab. By default, there is an area matching the name of the team.

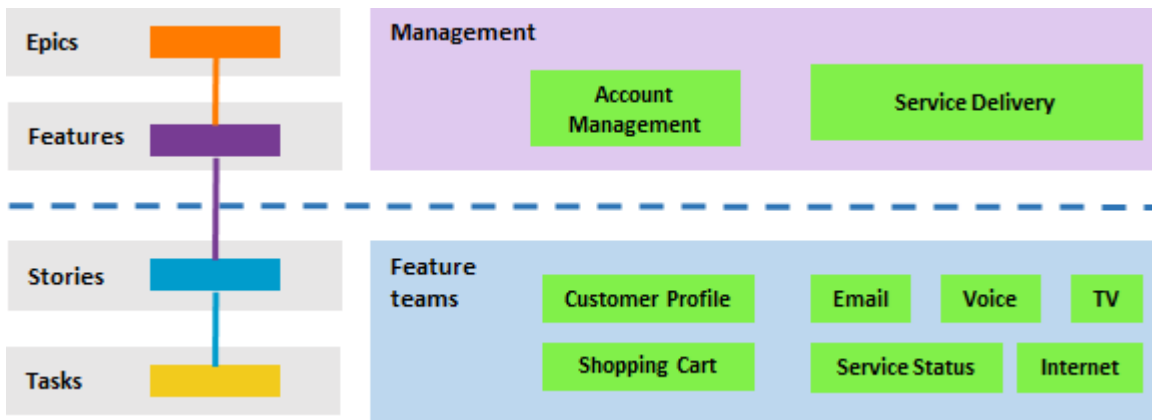
General Iterations **Areas** Templates

11. From the area dropdown, select **Include sub areas**. The default setting for all teams is to exclude sub-area paths. We will change it to include sub-areas so that the team gets visibility into all of the work items from all teams. Optionally, the management team could also choose to not include sub-areas, thereby removing work items from their view as soon as they are assigned to one of the teams.



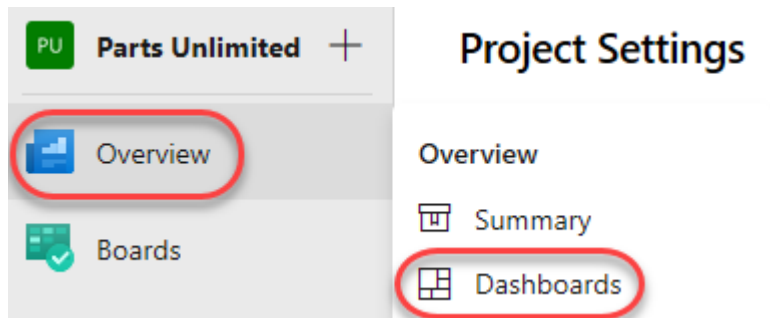
Task 2: Working with work items

Work items play a prominent role in Azure DevOps. Whether describing work to be done, impediments to release, test definitions, or other key items, work items are the workhorse of modern projects. In this task you'll focus on using various work items to set up the plan to extend the Parts Unlimited site with a product training section. While it can be daunting to build out such a substantial part of a company's offering, Azure DevOps and the Scrum process make it very manageable.

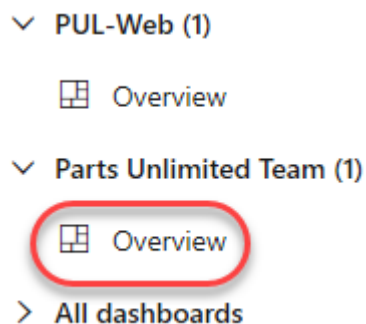


This task is designed to illustrate a variety of ways you can create different kinds of work items, as well as to demonstrate the breadth of features available on the platform. As a result, these steps should not be viewed as prescriptive guidance for project management. The features are intended to be flexible enough to fit your process needs, so explore and experiment as you go.

1. Navigate to **Overview | Dashboards**.



2. Select the **Overview** dashboard for **Parts Unlimited Team**.



3. There are many ways to create work items in Azure DevOps, and we'll explore a few of them. Sometimes it's as simple as firing one off from a dashboard. In the **New Work Item** form, type "**Product training**" and select the **Epic** type. Click **Create**.

4. Assign the new work item to yourself and set the **Area** to **Parts Unlimited\PUL-Web**. Set the **Iteration** to **Parts Unlimited\Sprint 2** and click **Save & Close**. Ordinarily you would want to fill out as much information as possible, but you can run lean here for the purposes of this lab.

NEW EPIC *

Product training

0 comments Add tag

Save & Close

State: New Area: Parts Unlimited\PUL-Web
Reason: New epic Iteration: Parts Unlimited\Sprint 2

Details LaunchDarkly

Description

B I U A Link Image List Bulleted Numbered Indented

Acceptance Criteria

B I U A Link Image List Bulleted Numbered Indented

Discussion

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

Status

Target Date

Details

Priority: 2
Effort
Business Value
Time Criticality
Value area: Business

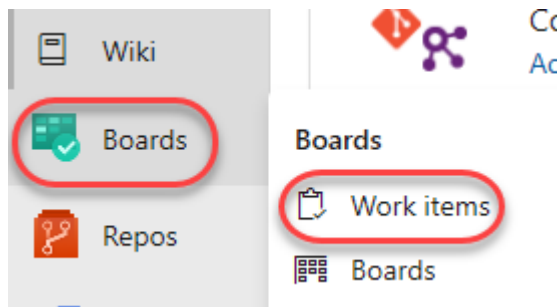
Development

+ Add link
Development hasn't started on this item.

Related Work

+ Add link
There are no links in this group.

5. Navigate to **Boards | Work Items**.



6. Locate the newly created epic for **Product training** and open it.

Work Items

Assigned to me | + New Work Item | Open in Queries | Column Options | Recycle Bin

Filter by keyword | Types | States | Area

ID	Title	State	Area Path
26637	Product training	New	Parts Unlimited\PUL-Web
26625	Parts Unlimited_TestPlan1	In Progress	Parts Unlimited
26636	26490 : As a customer, I should be able to put items to shopping c...	In Progress	Parts Unlimited

7. The work item form includes everything you could ever want to know about a work item. This includes details about who it's assigned to, its status across many parameters, and all the associated information and history for how it has been handled since creation. One of the key areas to focus on is the **Related Work**. One of the ways to add a feature to this epic is to select **Add link | New item**.

Status

Target Date

Details

Priority

2

Effort

Business Value

Development

+ Add link

Development hasn't started on this it

[Create a new branch](#)

Related Work

+ Add link ▾




Existing item

New item

8. Set the **Work item type** to **Feature** and set the **Title** to “**Training dashboard**”. Click **OK**.

Add link

You are adding a link from:

   26637 Product training
Updated 21 minutes ago, ● New

Link type

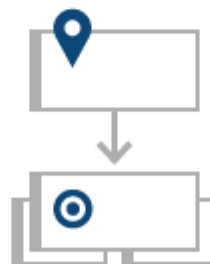
Child

☒ Work item type

Feature

Title

Training dashboard



Comment

OK

Cancel

9. That **Assignment**, **Area**, and **Iteration** should already set to the same as the epic, and it's even linked to the parent item it was created from. Click **Save & Close**.

FEATURE 26822*

26822 Training dashboard

0 comments Add tag

Save & Close

Follow

Updated just now

State: New

Area: Parts Unlimited\PUL-Web

Reason: New feature

Iteration: Parts Unlimited\Sprint 2

Description

Acceptance Criteria

Status

Target Date

Details

Priority: 3

Effort

Business Value

Development

+ Add link

Development hasn't started on this item.

Create a new branch

Related Work

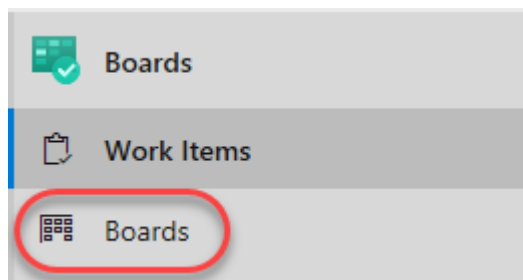
+ Add link

Parent

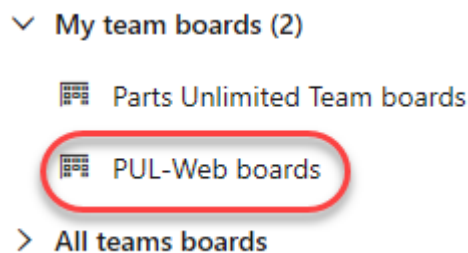
26821 Product training

Updated just now, New

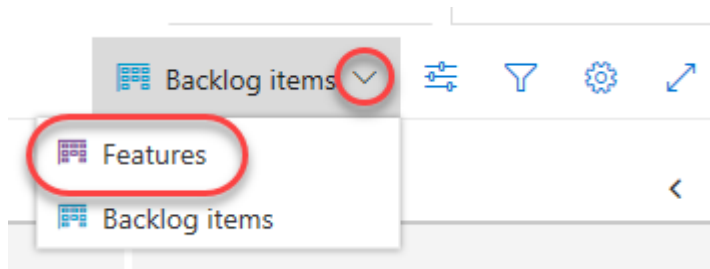
10. Navigate to the **Boards** view.



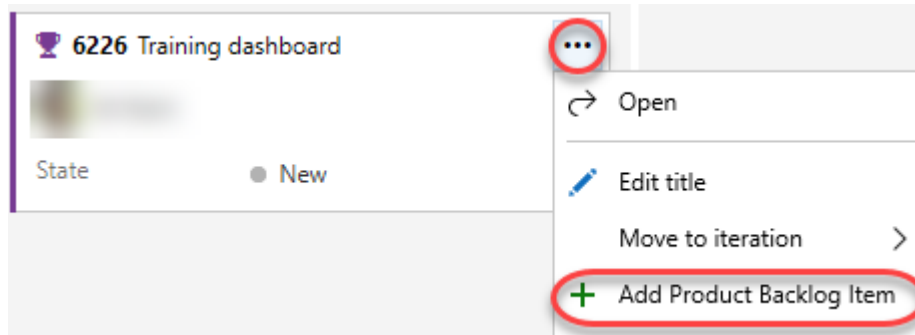
11. Select **PUL-Web Boards**. This will open the board for that particular team.



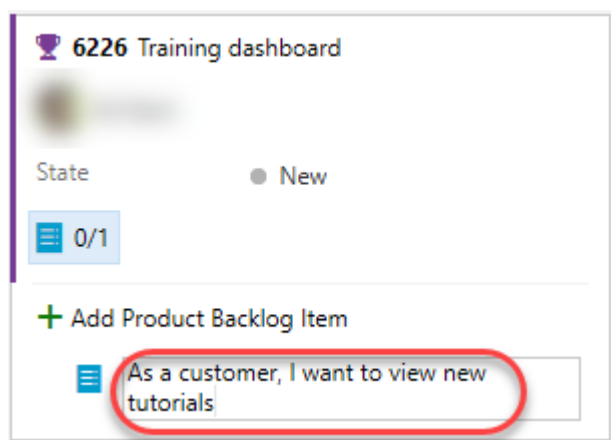
12. Switch the board from showing **Backlog items** to showing **Features**. This will make it easy to add tasks and other work items to the features.



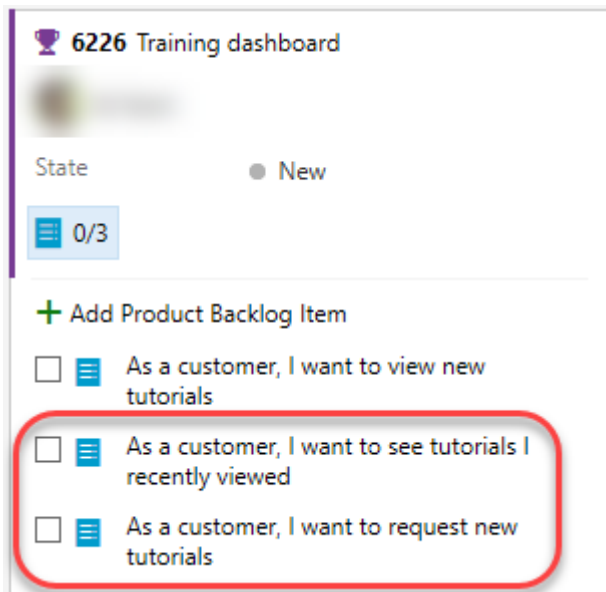
13. From the **Training dashboard** dropdown, select **Add Product Backlog Item**.



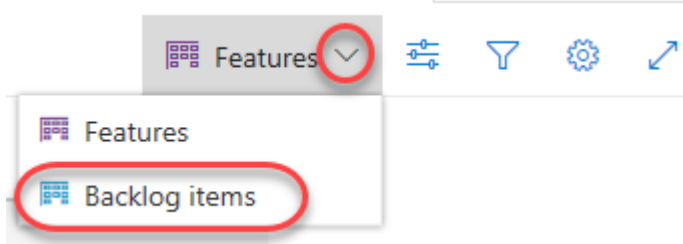
14. Name the first backlog item **"As a customer, I want to view new tutorials"** and press **Enter** to save. This creates a new **Product Backlog Item** (PBI) work item that is a child of the feature and shares its area and iteration.



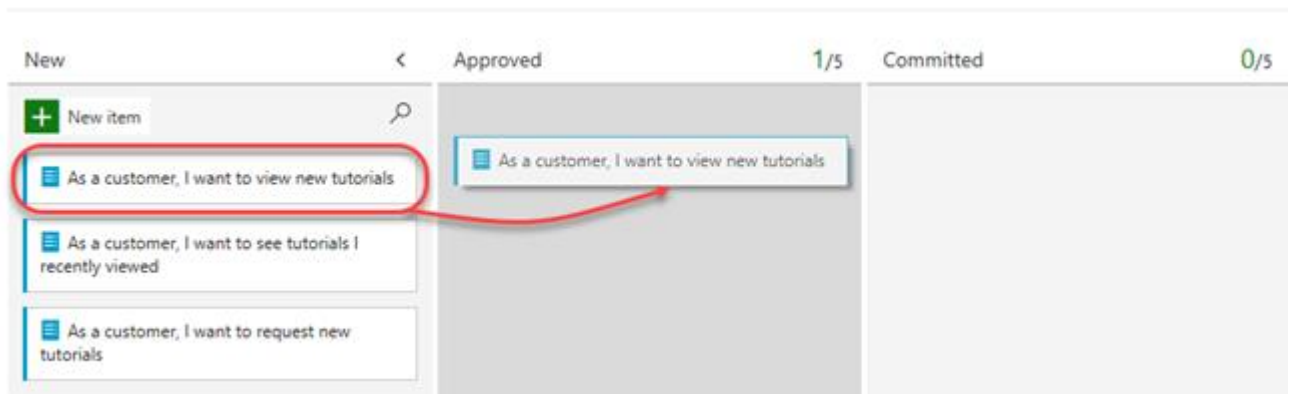
15. Add two more PBIs designed to enable the customer to see their recently viewed tutorials and to request new tutorials.



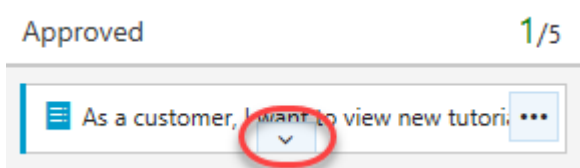
16. Switch the task board view back to **Backlog items**.



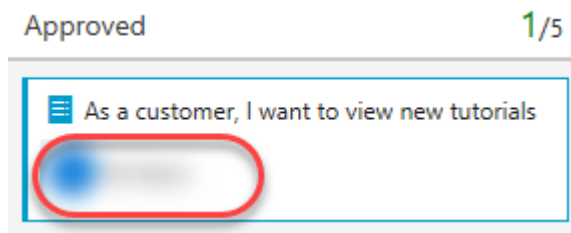
17. Backlog items have a state that defines where they are relative to being completed. While you could open and edit the work item using the form, it's easier to just drag cards on the board. Drag the first work item to **Approved**.



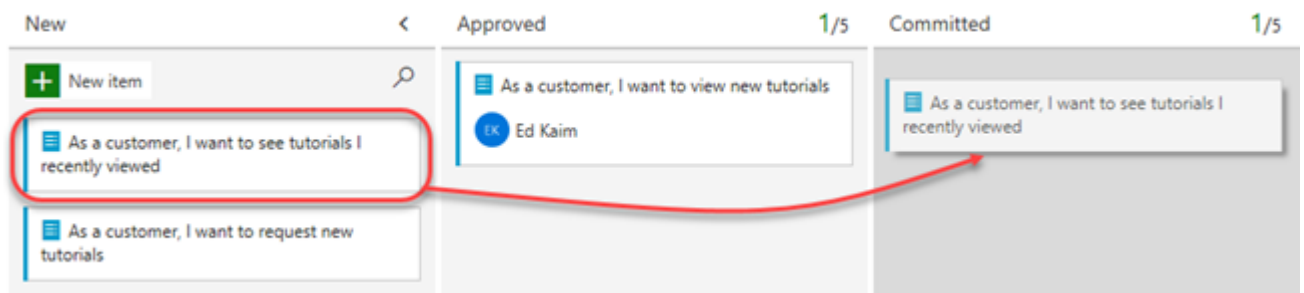
18. You can also expand work item cards to get to conveniently editable details.



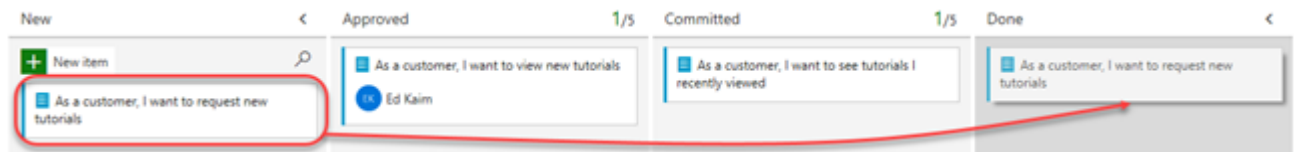
19. Assign the moved PBI to yourself.



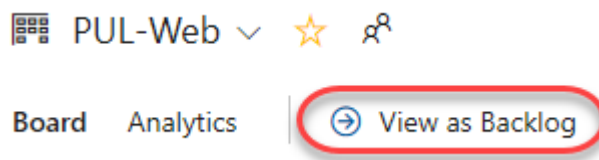
20. Drag the second work item to the **Committed** stage.





21. Drag the final PBI to the **Done** stage.



22. The task board is one view into the backlog. View the tabular form by clicking **View as Backlog**.



23. Click the **Expand** button, which allows you to view nested tasks under these work items. Another easy way to create work items is using the **Add** button on the backlog. Click it to add a new task to the first backlog item.

	Order	Work Item Type	Title
	1	Product Backl...	As a customer, I want to view new tutorials
	2	Product Backl...	As a customer, I want to second thing

24. Set the **Title** to **"Add page for most recent tutorials"**. Set the **Remaining Work** to **"5"** and the **Activity** to **"Development"**. Click **Save & Close**.

NEW TASK *

Add page for most recent tutorials

Unassigned 0 comments Add tag Save & Close

State To Do Area Parts Unlimited\PUL-Web
Reason New task Iteration Parts Unlimited\Sprint 2

Details LaunchDarkly

Description

Details

Priority 2
Remaining Work 5
Activity Development

Development

Related Work

25. Add another task to **“Optimize data query for most recent tutorials”**. Set its **Remaining Work** to **“3”** and its **Activity** to **“Design”**. Click **Save & Close**.

NEW TASK *

Optimize data query for most recent tutorials

Unassigned 0 comments Add tag Save & Close

State To Do Area Parts Unlimited\PUL-Web
Reason New task Iteration Parts Unlimited\Sprint 2

Details LaunchDarkly

Description

Details

Priority 2
Remaining Work 3
Activity Design

Development

Related Work

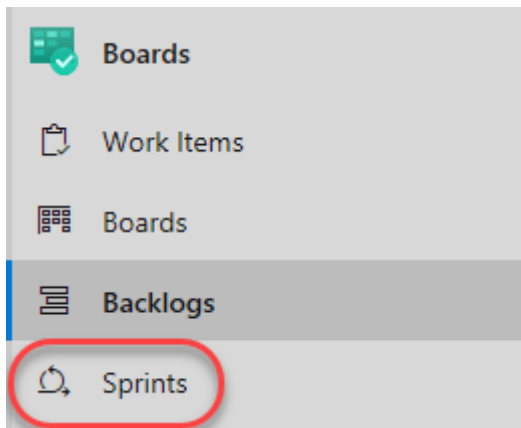
Task 3: Managing sprints and capacity

Your team builds the sprint backlog during the sprint planning meeting, typically held on the first day of the sprint. Each sprint corresponds to a time-boxed interval which supports your team’s ability to work using Agile processes and tools. During the planning meeting, your product owner works with your team to identify those stories or backlog items to complete in the sprint.

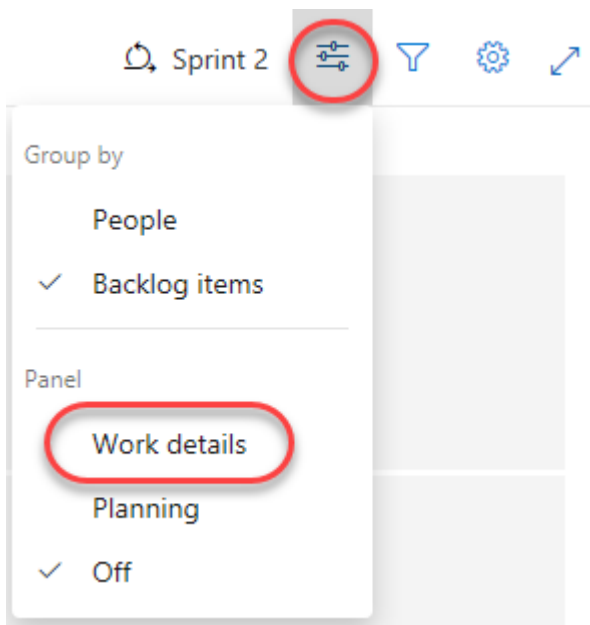
Planning meetings typically consist of two parts. In the first part, the team and product owner identify the backlog items that the team feels it can commit to completing in the sprint, based on experience with previous sprints. These items get added to the sprint backlog. In the second part, your team determines how it will develop and test each item. They then define and estimate the tasks required to complete each item. Finally, your team commits to implementing some or all the items based on these estimates.

1. Your sprint backlog should contain all the information your team needs to successfully plan and complete work within the time allotted without having to rush at the end. Before you start planning your sprint,

you'll want to have created, prioritized, and estimated your backlog and defined your sprints. Navigate to the **Sprints** view using the navigation.



2. From the **View options** dropdown, select the **Work details** panel option.



3. The current sprint has a pretty limited scope. There are two tasks in the **To do** stage that combine for 8 hours of estimated work. At this point, neither task has been assigned.

ity | + New Work Item ▾ | Sprint 2 | [Icons]

To do 8 h	In progress	Done
<div> <div> Unassigned </div> 5 </div> <div> <div> Unassigned </div> 3 </div>		

Work

Team (8 h)

Work By: Activity

Design (3 h)

Development (5 h)

Work By: Assigned To

Unassigned (8 h)

4. Assign the **Add page** task to yourself. Note that this updates the capacity view.

ity | + New Work Item ▾ | Sprint 2 | [Icons]

To do 8 h	In progress	Done
<div> <div> Unassigned </div> 5 </div> <div> <div> Unassigned </div> 3 </div>		

Work

Team (8 h)

Work By: Activity

Design (3 h)

Development (5 h)

Work By: Assigned To

Unassigned (3 h)

(5 h)

5. Select the **Capacity** tab. This view enables you to define what activities a user can take on and at what level of capacity. In this case, set your capacity to allow “1” hour of **Development** per day. Note that you can add additional activities per user in the case they do more than just development.

Taskboard | Backlog | **Capacity** | Analytics | + Add user | Save | Undo | ...

User	Days off	Activity	Capacity per day
	0 days	Development ▾	1
Team days off	0 days	These days off apply to the whole team.	

6. However, let's assume you're going to take some vacation. Click **0 days** under **Days off**.

Days off

0 days

7. Set your vacation to span five work days during the current sprint (within the next few weeks). Click **OK**.

Start	End	Days off
6/25/2018	6/29/2018	5

+ Add additional days off

Total 5

OK Cancel

8. Click **Save**.

+ Add user **Save** Undo ...

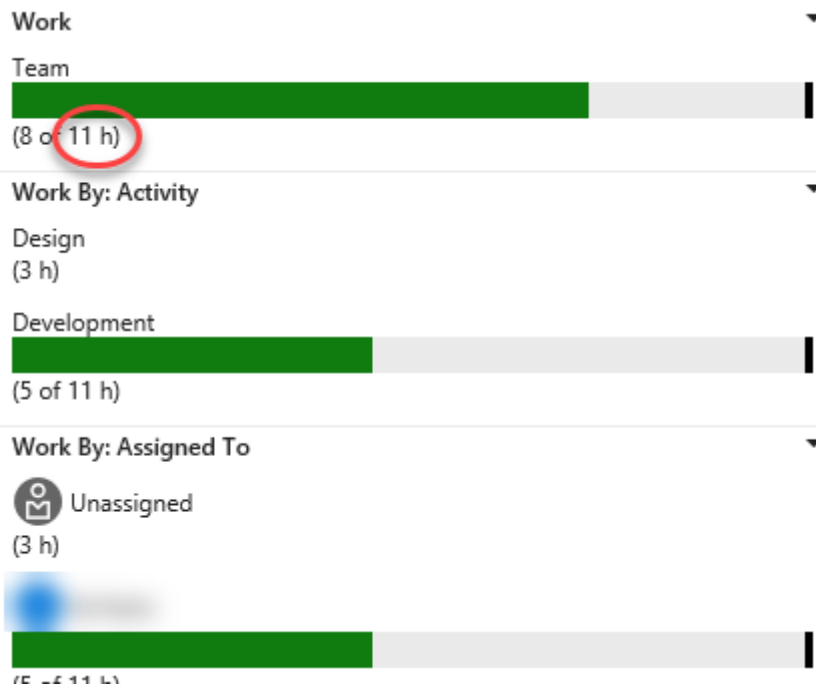
Days off	Activity	Capacity per day
5 days	Development	1

0 days These days off apply to the whole team.

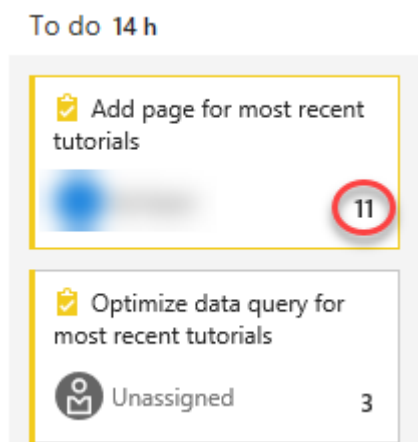
9. Return to the **Taskboard**.

Taskboard Backlog Capacity

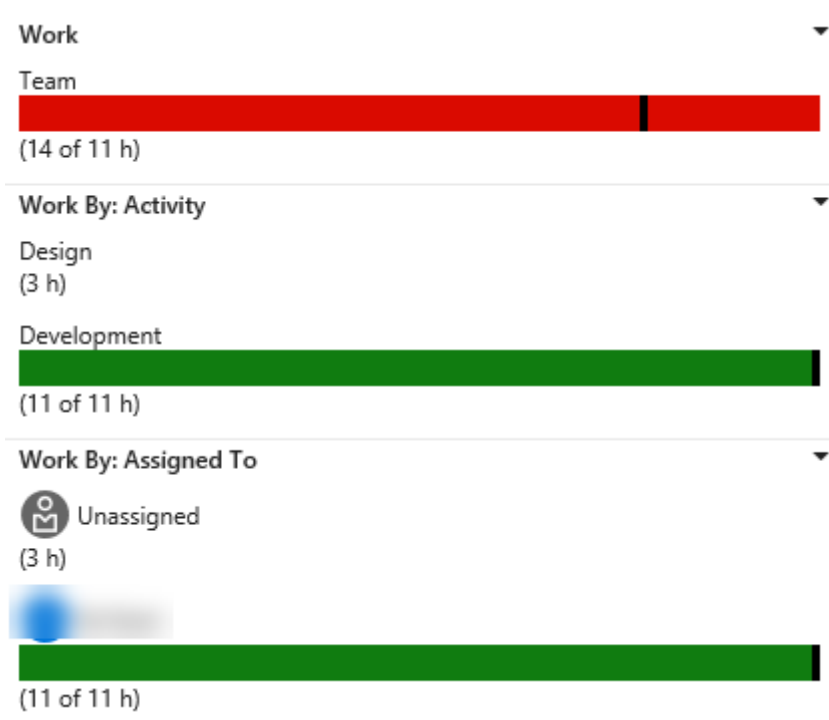
10. Note that the capacity view has been updated to reflect your available bandwidth. This exact number may vary, but for the screenshots here, that sprint capacity is 11 hours (1 hour per day over 11 working days).



11. One convenient feature of the boards is that you can easily update key data in-line. It's a good practice to regularly update the **Remaining Work** estimate to reflect the amount of time expected for each task. Let's say you've reviewed the work for the **Add page** task and found that it will actually take longer than originally expected. Set it to whatever your total capacity is for this sprint.



12. Note how this expands the **Development** and your personal capacities to their maximum. Since they're large enough to cover the assigned tasks, they stay green. However, the overall **Team** capacity is exceeded due to the additional 3 hours required by the other task.



13. One way to resolve this capacity issue would be to move the task to a future iteration. There are a few ways this could be done. First, you could open the task here and edit it in the dialog. The **Backlog** view, on the other hand, provides an in-line menu option to move it. Don't move it now.

Taskboard **Backlog** Capacity | + New Work Item ...

Order	Work Item Type	Title	State	Effort	Value Area	Iteration Path
1	Product Backl...	As a customer, I want to view new tutorials	Approved		Business	Parts Unlimited\Sprint 2
	Task	Add page for most recent tutorials	To Do			Parts Unlimited\Sprint 2
	Task	Optimize data query for most recent tutorials	To Do			Parts Unlimited\Sprint 2
2	Product Backl...	As a customer, I want to see tutorials I recently viewed			Business	Parts Unlimited\Sprint 2
3	Product Backl...	As a customer, I want to request new tutorials			Business	Parts Unlimited\Sprint 2

Context menu options for the selected task:

- Edit...
- Assign to
- Copy to clipboard
- Delete
- Templates
- Add link
- Move to iteration**
- Move to top
- Change type...
- Move to team project...

Backlog details:

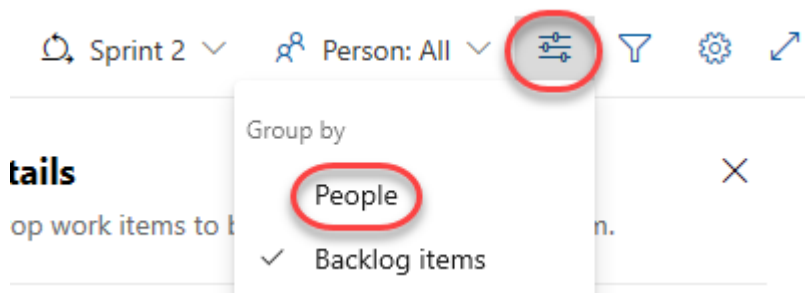
- Backlog
 - Current (Sprint 2 - 6/18/2018 - 7/9/2018)
 - FUTURE ITERATIONS
 - Sprint 3 - 7/10/2018 - 7/31/2018

14. Return to the **Taskboard** view.

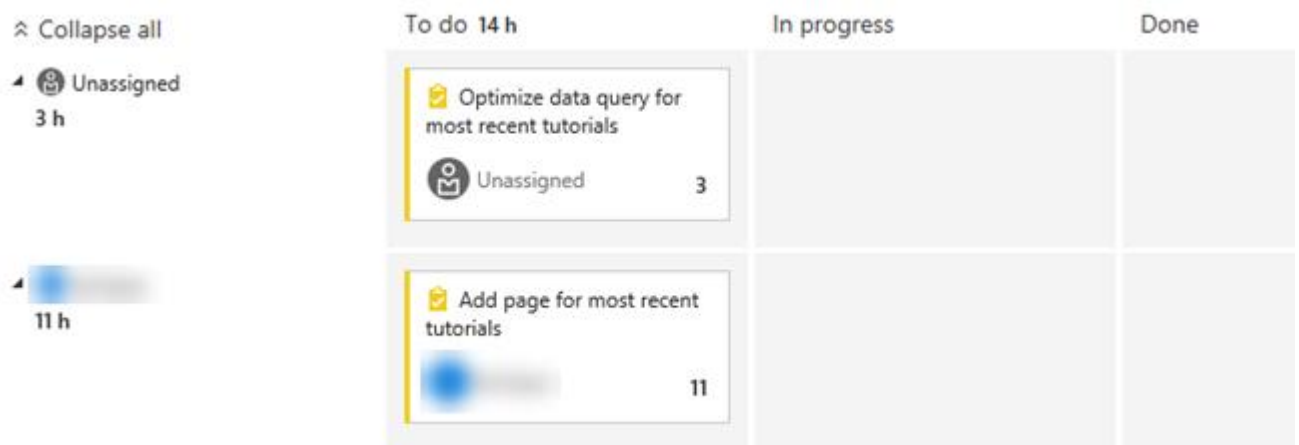
PUL-Web ▾ ☆ 🔍

Taskboard Backlog Capacity | + New Work Item ...

15. Select **People** from the **View options** dropdown.



16. This adjusts your view such that you can review the progress of tasks by person instead of by backlog item.



17. There is also a lot of customization available. Click the **Configure team settings** button.



18. On the **Styles** tab, click **Add Styling rule** and set the **Name** to **"Development"**. Choose a green **Card color**. This will color all cards green if they meet the rule criteria set below.

Cards

Fields

Styles

General

Backlogs

Working days

Working with bugs

Styles

Styling rules make the cards with important information stand out. When a work item match than one rule, the first rule is used.

+ Styling rule

Rule Name	Preview	Enabled
Development		<input checked="" type="checkbox"/>

Rule name

Name

Styling

Select your style choices.

Card color

19. Add a rule for **Activity = Development**. This will set all cards assigned to **Development** activities green.

Rule criteria

Your styling choices apply to all work items that match all clauses of your custom criteria.

Field	Operator	Value
Activity	=	Development

+ Add new clause

20. The **Backlogs** tab allows you to set the levels available for navigation. Epics are not included by default, but you could change that here.

Cards

Fields

Styles

General

Backlogs

Working days

Working with bugs

Backlogs

See only the backlogs your team manages.

Backlog navigation levels

☐ Epics

☒ Features

☒ Backlog items

21. You can also specify the **Working days** the team follows. This applies to capacity and burndown calculations.

Cards

- Fields
- Styles

General

- Backlogs
- Working days**
- Working with bugs

Working days

Capacity and burndown an

Select days

- ☒ Monday
- ☒ Tuesday
- ☒ Wednesday
- ☒ Thursday
- ☒ Friday
- ☐ Saturday
- ☐ Sunday

22. The **Working with bugs** tab allows you to specify how bugs are presented on the board.

Cards

- Fields
- Styles

General

- Backlogs
- Working days
- Working with bugs**

Working with bugs

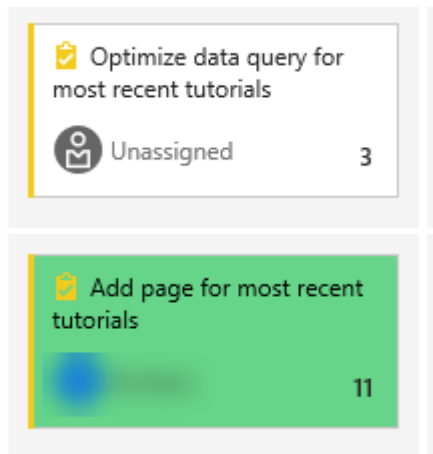
Set your team's preference for how they manage bugs. Your selection determines where bugs appear in the hierarchy and on backlogs and boards. [Learn more about the bug management setting.](#)

- ☒ Bugs are managed with requirements. ⓘ
- ☐ Bugs are managed with tasks. ⓘ
- ☐ Bugs are not managed on backlogs and boards. ⓘ

23. Click **Save and close** to save the styling rule.

Save and close **Cancel**

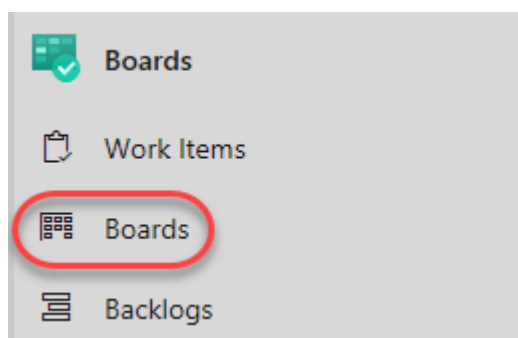
24. The task associated with **Development** is now green and very easy to identify.



Task 4: Customizing Kanban boards

To maximize a team's ability to consistently deliver high quality software, Kanban emphasize two main practices. The first, visualize the flow of work, requires you to map your team's workflow stages and configure your Kanban board to match. The second, constrain the amount of work in progress, requires you to set work-in-progress (WIP) limits. You're then ready to track progress on your Kanban board and monitor key metrics to reduce lead or cycle time. Your Kanban board turns your backlog into an interactive signboard, providing a visual flow of work. As work progresses from idea to completion, you update the items on the board. Each column represents a work stage, and each card represents a user story (blue cards) or a bug (red cards) at that stage of work. However, every team develops its own process over time, so the ability to customize the Kanban board to match the way your team works is crucial.

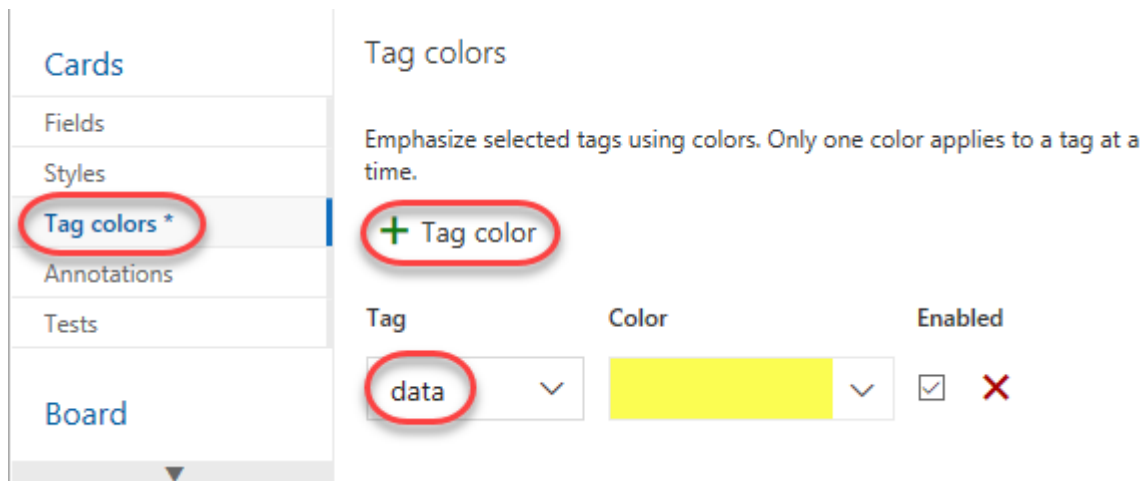
1. Navigate to **Boards**.



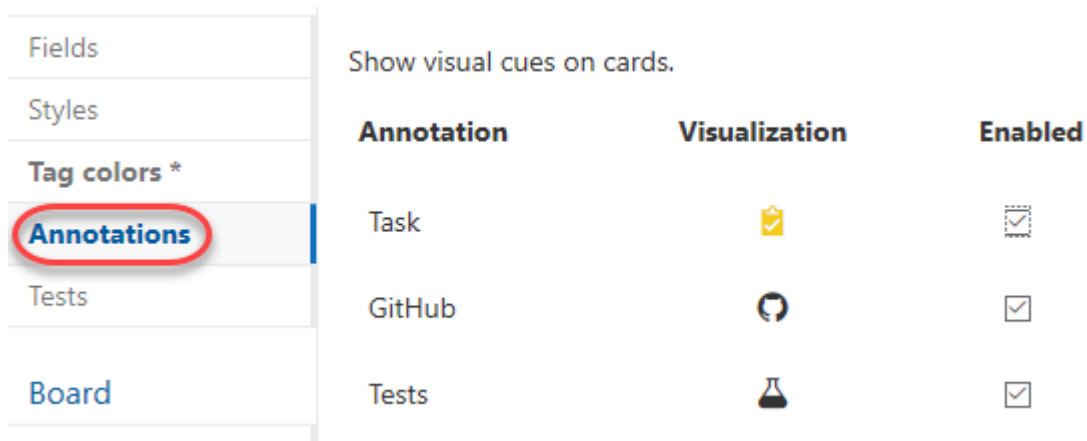
2. Click the **Configure team settings** button.



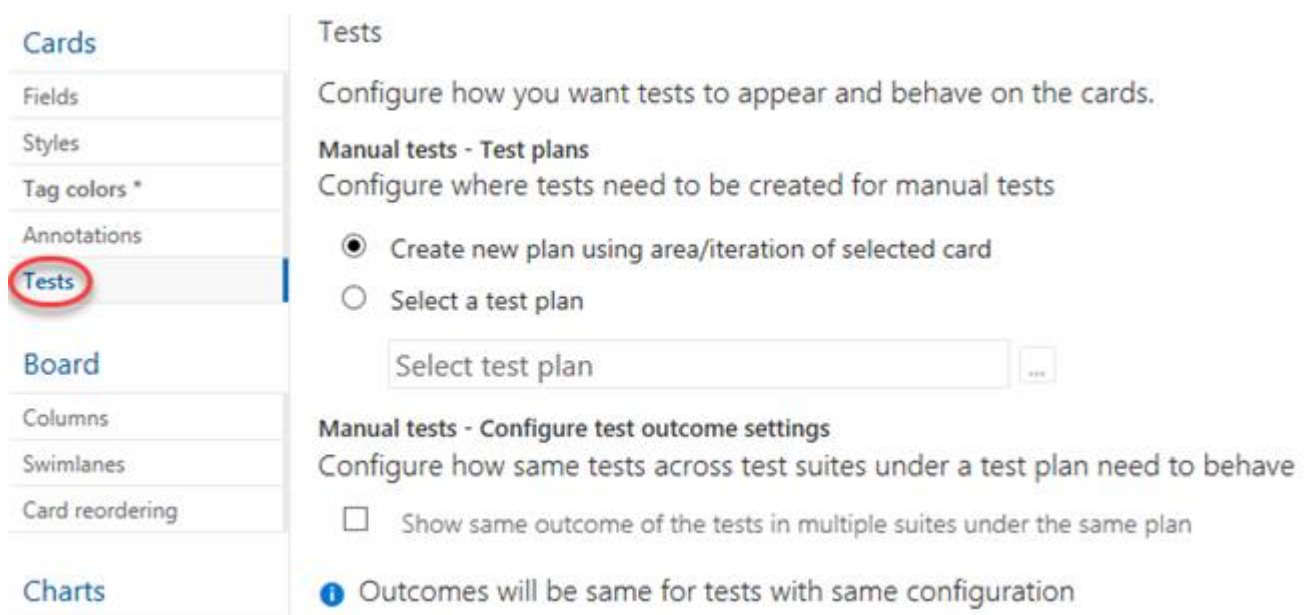
3. The team is emphasizing work done with data, so there is special attention paid to any task associated with accessing or storing data. Select the **Tag colors** tab. Click **Add tag color** enter a tag of **"data"**. Whenever a backlog item or bug is tagged with **data**, that tag will be highlighted.



4. You can also specify which **Annotations** you would like included on cards to make them easier to read and navigate. When an annotation is enabled, the child work items of that type are easily accessible by clicking the visualization on each card.



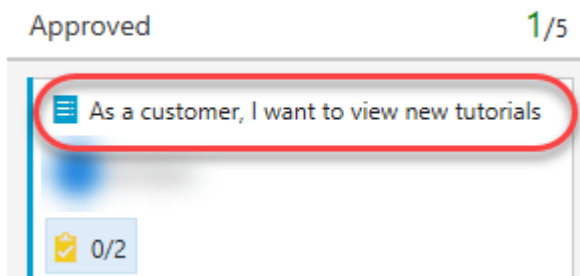
5. The **Tests** tab enables you to configure how tests appear and behave on the cards.



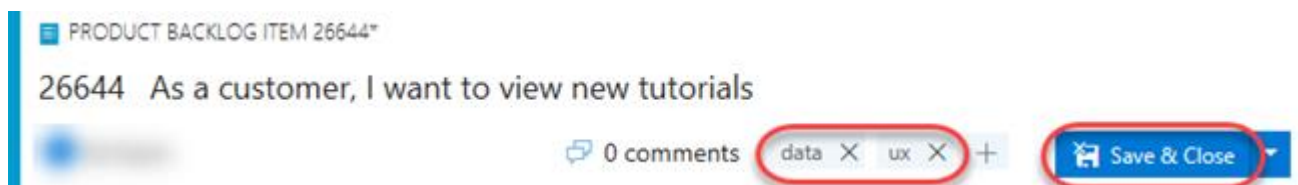
6. Click **Save and close**.



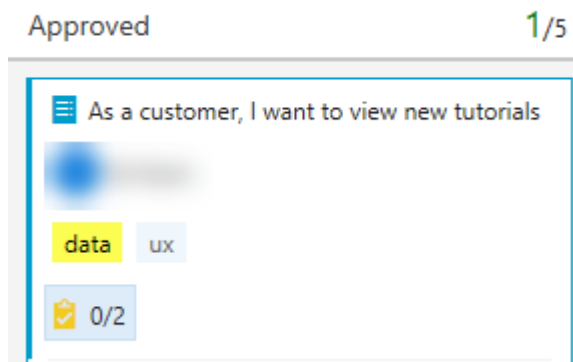
7. Open the **view new tutorials** backlog item.



8. Add tags for **"data"** and **"ux"**. Click **Save & Close**.



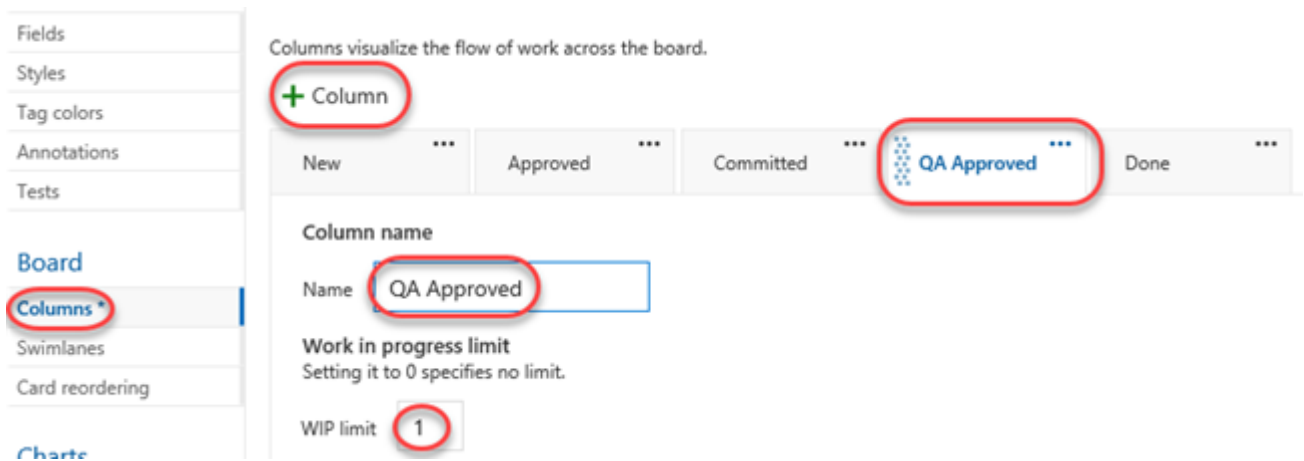
9. Note that the two tags are now visible on the card, although the **data** tag is highlighted yellow as configured.



10. Click the **Configure team settings** button.



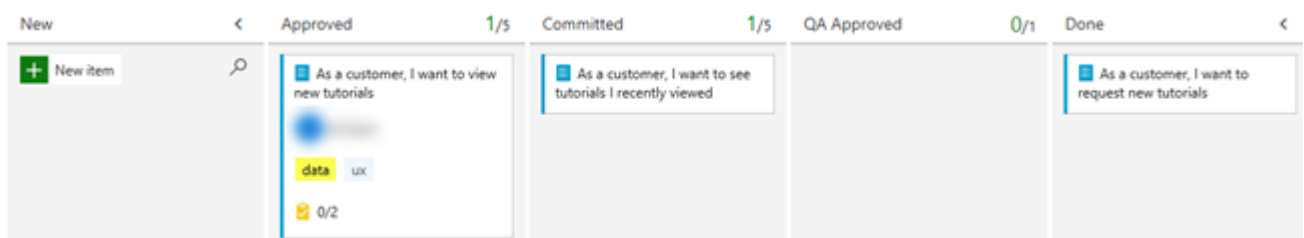
11. Select the **Columns** tab. This section allows you to add new stages to the workflow. Click **Add Column** and set the **Name** to **"QA Approved"**. Set the **WIP limit** to **"1"**, which indicates that only one work item should be in this stage at a time. You would ordinarily set this higher, but there are only two work items to demonstrate the feature with here. Move the stage to occur between **Committed** and **Done**.



12. Click **Save and close**.



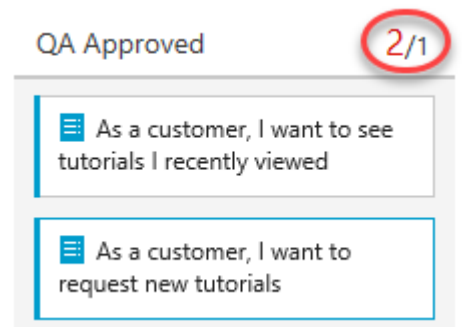
13. You will now see the new stage in the workflow.



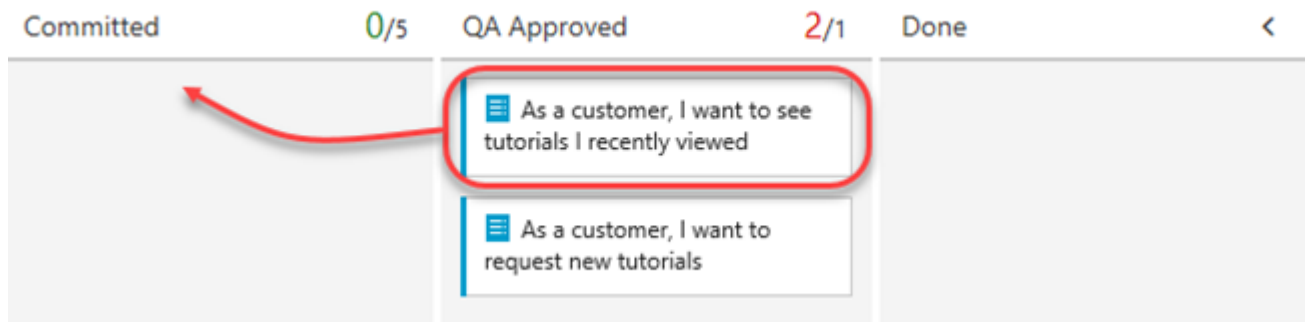
14. Move the work items from **Committed** and **Done** into **QA Approved**.



15. The stage now exceeds its **WIP** limit and is colored red as a warning.



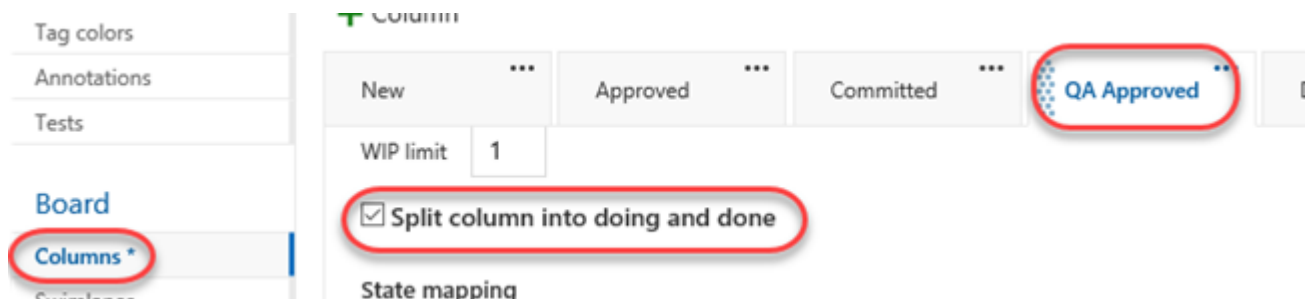
16. Move the **recently viewed** backlog item back to **Committed**.



17. Click the **Configure team settings** button.



18. Return to the **Columns** tab and select **QA Approved**. A lag often exists between when work gets moved into a column and when work starts. To counter that lag and reveal the actual state of work in progress, you can turn on split columns. When split, each column contains two sub-columns: **Doing** and **Done**. Split columns let your team implement a pull model. Without split columns, teams push work forward, to signal that they've completed their stage of work. However, pushing it to the next stage doesn't necessarily mean that a team member immediately starts work on that item. Check **Split column into doing and done** to create two separate columns for this.



19. As your team updates the status of work as it progresses from one stage to the next, it helps that they agree on what **done** means. By specifying the **Definition of done** criteria for each Kanban column, you help share the essential tasks to complete before moving an item into a downstream stage. Add a **Definition of done** using markdown, such as **"Passes **all** tests."**. Click **Save and close**.

Definition of done

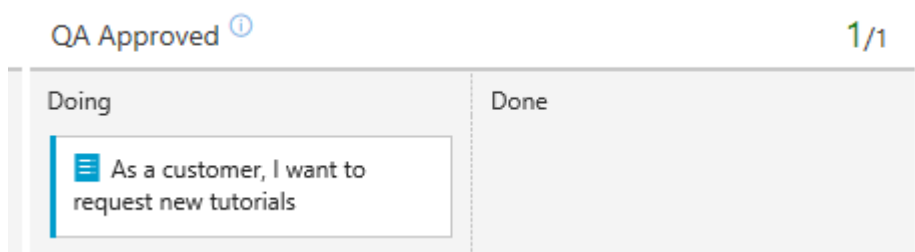
Enter plain text or format using markdown.

Passes **all** tests.

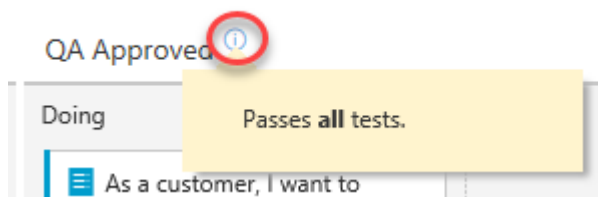
Save and close

Cancel

20. Note that the **QA Approved** stage now has **Doing** and **Done** columns.



21. You can also click the icon next to the column header to read the **Definition of done**.



22. Click the **Configure team settings** button.



23. Your Kanban board supports your ability to visualize the flow of work as it moves from new to done. When you add **swimlanes**, you can also visualize the status of work that supports different service-level classes. You can create a swimlane to represent any other dimension that supports your tracking needs. From the **Swimlanes** tab, click **Add Swimlane** and set the **Name** to **“Expedite”**. Click **Save and close**.

Cards

Fields

Styles

Tag colors

Annotations

Tests

Board

Columns

Swimlanes *

Card reordering

Status badge

Swimlanes

Swimlanes visualize different classes of work as horizontal lanes on the board.

+ Swimlane

Expedite

Swimlane name

Name Expedite

Save and close

Cancel

24. Drag and drop the **Committed** work item onto **QA Approved | Doing** so that it gets recognized as having priority when QA bandwidth becomes available.

Approved 1/5

Committed 0/5

QA Approved ⓘ

Expedite

Doing

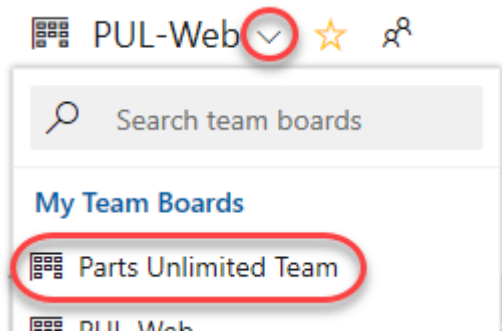
As a customer, I want to see tutorials I recently viewed

Doing

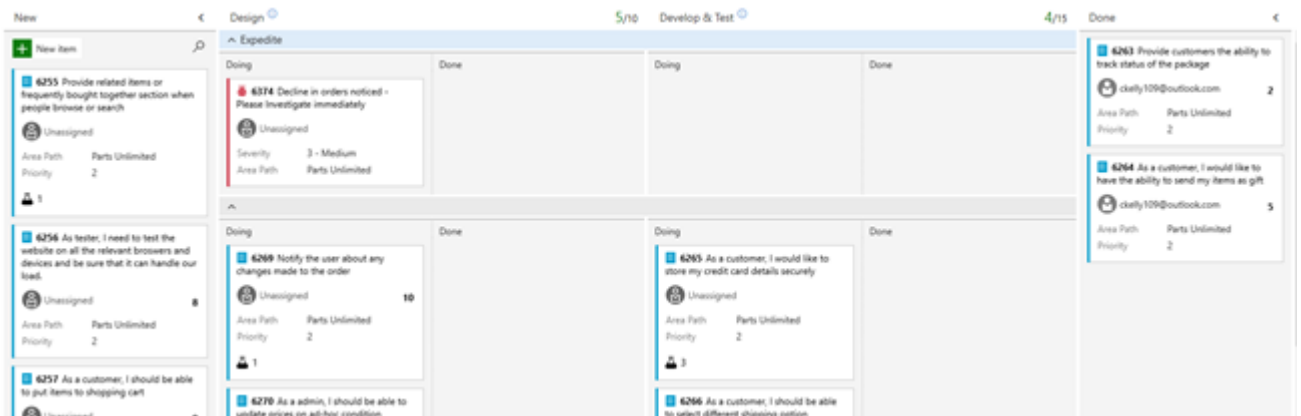
As a customer, I want to see tutorials I recently viewed

As a customer, I want to request new tutorials

25. If you would like to review a more sophisticated board with many more work items, select the **Parts Unlimited Team** from the team dropdown.

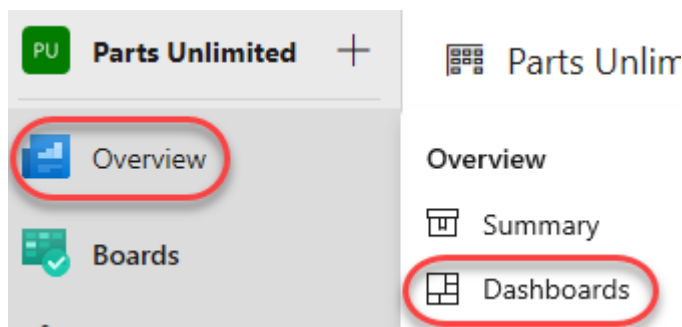


26. This board provides a playground for you to experiment with and review the results.



Task 5: Defining dashboards

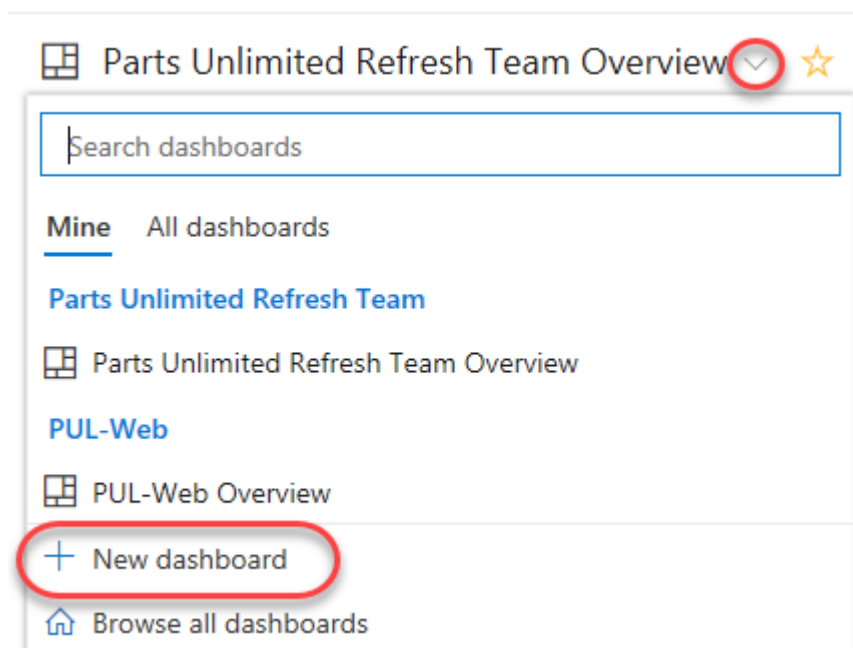
1. Select **Overview | Dashboards**.



2. From the dashboard dropdown, select **Parts Unlimited Team Overview**. Dashboards allow teams to visualize status and monitor progress across the project. At a glance, you can make informed decisions without having to drill down into other parts of your team project site. The Overview page provides access to a default team dashboard which you can customize by adding, removing, or rearranging the tiles. Each tile corresponds to a widget that provides access to one or more features or functions.



- From the dashboard dropdown, select **New dashboard**.



- Set the **Name** to **"Product training"** and select the **PUL-Web** team. Click **Create**.

Create a dashboard



Name

Product Training

Description

Enter a description

☐ Automatically refresh the dashboard every 5 minutes

Dashboard Type

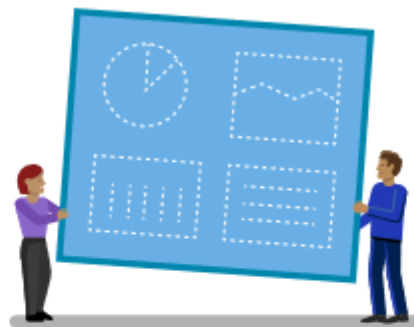
☒ Team Dashboard

The dashboard is associated with a single team. Team admins can

Create

Cancel

5. Click **Add a widget**.

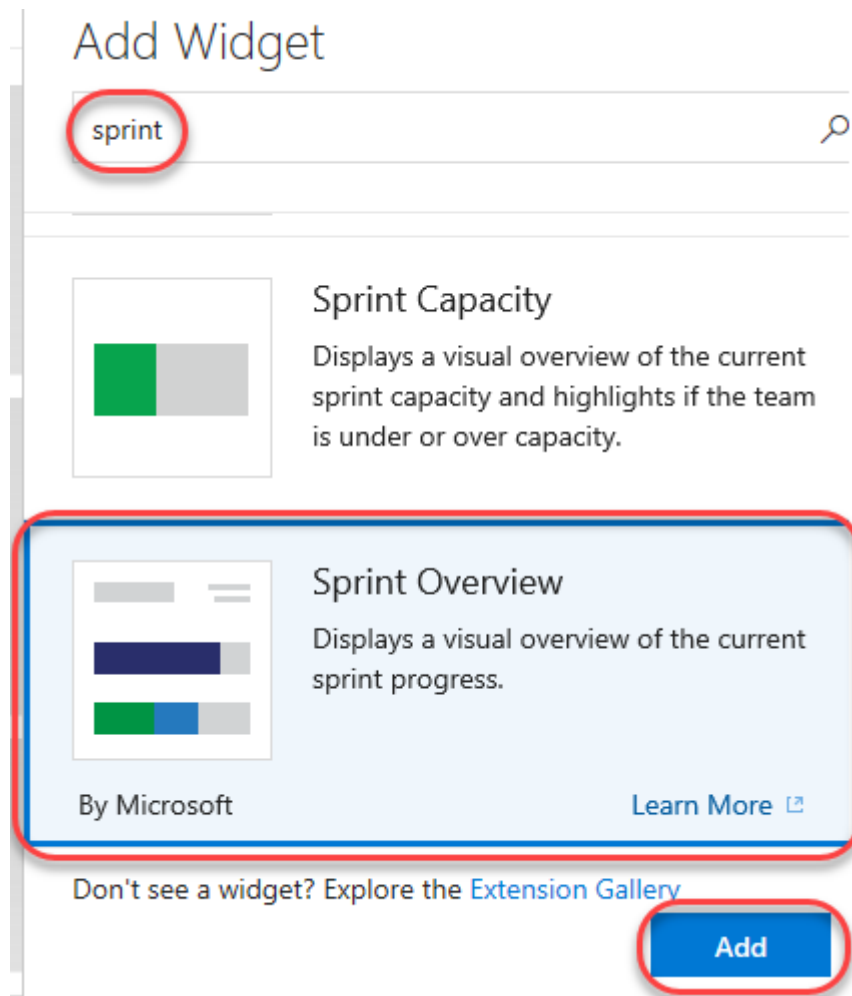


This dashboard doesn't have widgets just yet!

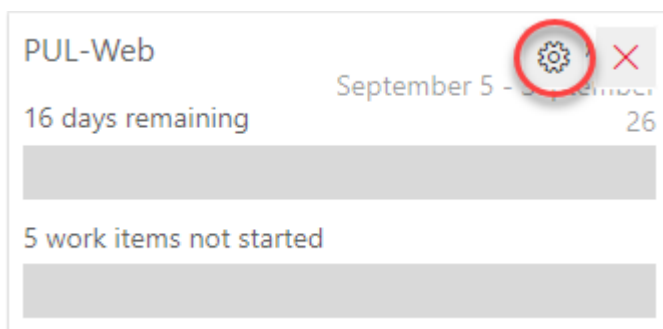
Add one or more widgets to gain visibility into your team's progress.

Add a widget

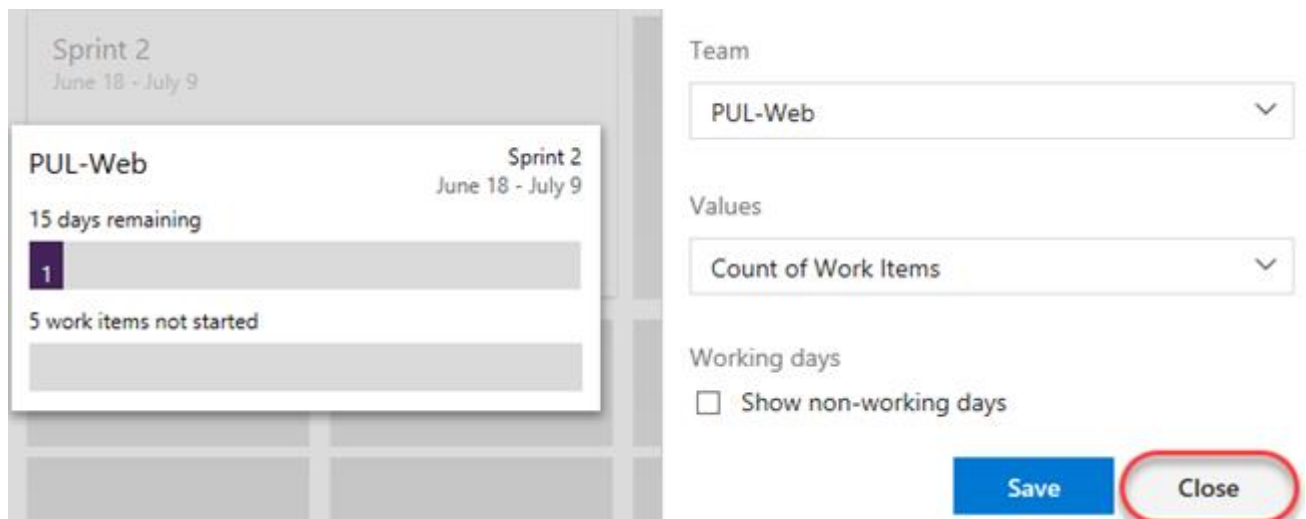
6. In the **Add Widget** panel, search for “**sprint**” to find existing widgets that focus on sprints. Select **Sprint Overview** and click **Add**.



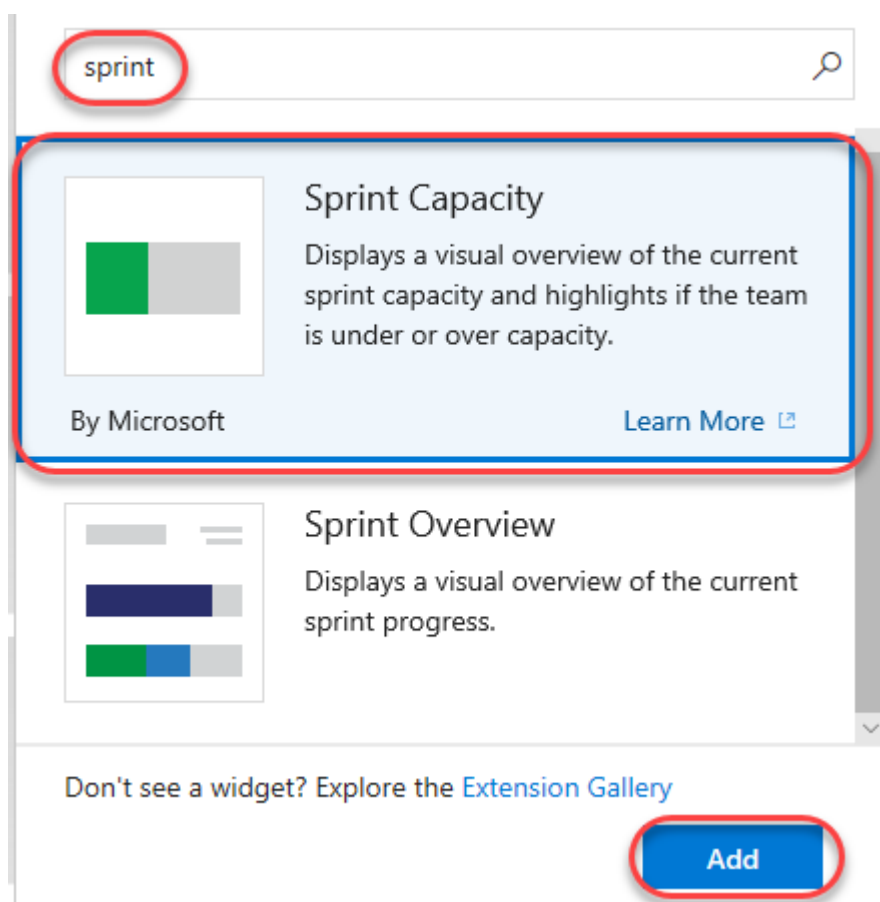
7. Many widgets have options you can configure. Click the **Settings** button.



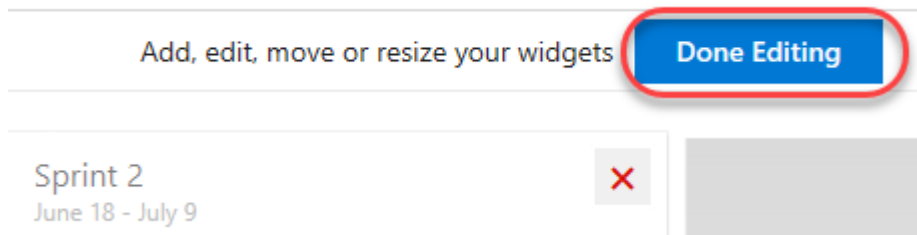
8. The quantity and depth of settings will vary by widget. Click **Close** to dismiss.



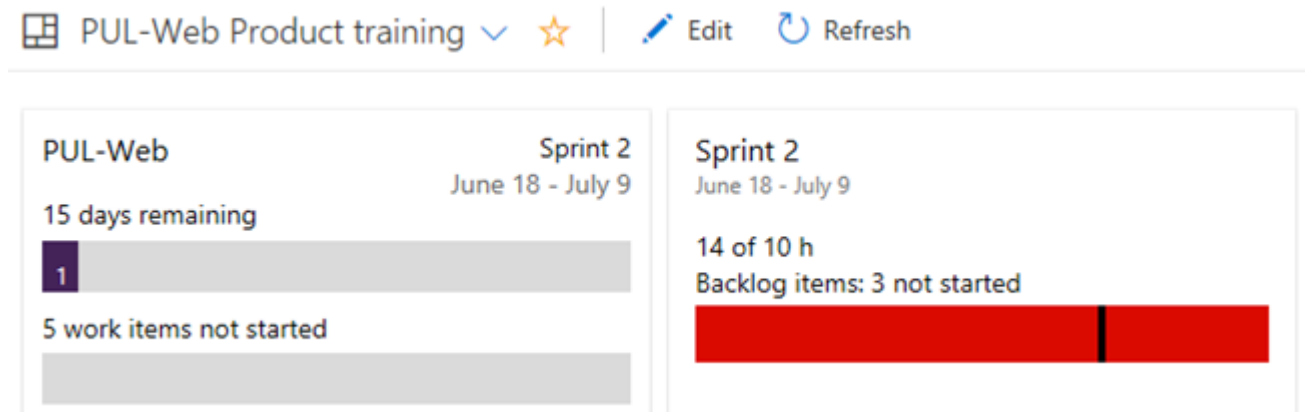
9. Search the widgets again for “**sprint**” and add the **Sprint Capacity** widget.



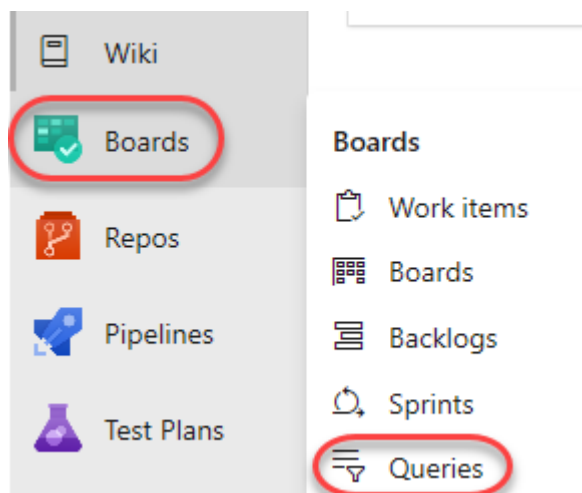
10. Click **Done Editing**.



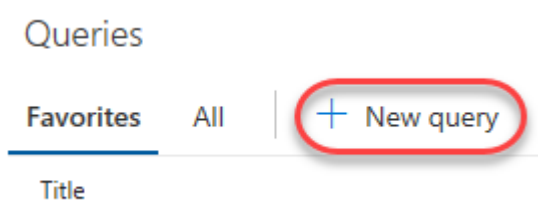
11. You can now review two important aspects of your current sprint on your custom dashboard.



12. Another way of customizing dashboards is to generate charts based on work item queries, which you can share to a dashboard. Select **Boards | Queries**.



13. Click **New query**.






14. Set the first term to **Work Item Type = Task** and the second term to **Area Path = Parts Unlimited\PUL-Web**.

Filters for top level work items

	And/Or	Field	Operator	Value
+ X	<input type="checkbox"/>	Work Item Type	=	Task
+ X	<input type="checkbox"/> And	Area Path	=	Parts Unlimited\PUL-Web
+ Add new clause				

15. Click **Save query**.

 Save query  Revert changes  Column options

16. Set the **Name** to “**Web tasks**” and the **Folder** to **Shared Queries**. Click **OK**.

New query ×

Name *

Folder *

17. Select the **Charts** tab and click **New chart**.

Results Editor **Charts** |  Refresh charts  New chart

18. Click **New chart**.



Visualize query results with charts

Create several types of charts - such as pie, column, or trend - to quickly view the status of work.

New chart

19. Set the **Name** of the chart to “**Web tasks - By assignment**” and **Group by** to **Assigned To**. Click **OK** to save.

Name

Group by

Aggregation
Count of work items

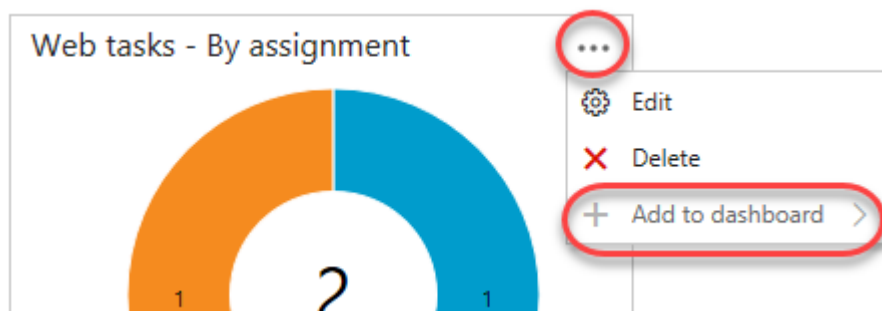
Sort
Value Descending

Series

(blank)

OK Cancel

20. You can now add this chart to a dashboard.



Task 6: Customizing team process

In Azure DevOps, you customize your work tracking experience through a process. A process defines the building blocks of the work item tracking system as well as other sub-systems you access through Azure DevOps. Whenever you create a team project, you select the process which contains the building blocks you want for your project.

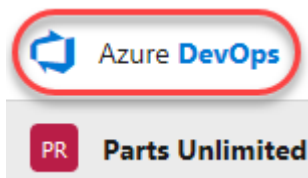
Azure DevOps supports two process types. The first, the core system processes-Scrum, Agile, and CMMI system processes-are locked. You cannot customize these processes. The second type, inherited processes, you create from a core system process. These processes you can customize.

In addition, all processes are shared. That is, one or more team projects can reference a single process. Instead of customizing a single team project, you customize a process. Changes made to the process automatically update all team projects that reference that process.

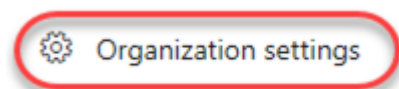
Once you've created an inherited process, you can customize it, create team projects based on it, and migrate existing team projects to reference it. The Git team project can't be customized until it's migrated to an inherited process.

In this task we'll create a new process that inherits from Scrum. The one change we'll make is to add a backlog item field designed to track to a proprietary PartsUnlimited ticket ID.

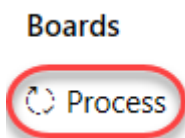
1. Click the **Azure DevOps** logo in the top left corner to navigate to the account root.



2. From the left bottom corner, click **Organization settings**.



3. Select the **Process** tab under **Boards**.



4. From the **Scrum** dropdown, select **Create inherited process**.

All processes

[Help](#)

[Filter by process name](#)

Processes Fields

Name	Description	Team projects
Agile (default)	This template is flexible and will work great for...	2
Scrum	This template is for teams who follow the Scru...	16
CMMI	jects requi...	0

...

+ New team project

Create inherited process

→ Change team projects to use Scrum

Set as default process

Disable process

Security

- Set the name of the inherited process to **Customized Scrum** and click **Create process**.

Create inherited process from Scrum

Create a new inherited process to enable customizations.

Scrum [system process]

Description

[Learn more](#)

Create process

Cancel

- Open **Customized Scrum**. You may need to refresh the browser for this to become visible.

Agile (default)	This template is flexible and will work great for...	2
Scrum	This template is for teams who follow the Scru...	16
Customized Scrum		0
CMMI	This template is for more formal projects requi...	0

- Select **Product Backlog Item**.

[Work item types](#)
[Backlog levels](#)
[Projects](#)

[Help](#)

Filter by work item type name

+ New work item type	
Name	Description
Bug	Describes a divergence between required and...
Epic	Epics help teams effectively manage and groo...
Feature	Tracks a feature that will be released with the p...
Impediment	Tracks an obstacle to progress.
Product Backlog Item	Tracks an activity the user will be able to perfor...

8. Click **New field**.

All processes > Customized Scrum > Product Backlog Item

Layout
States
Rules

New field
 New group
 New page
 Get extensions

Details

LaunchDarkly

Description
Text (multiple lines)

Details
 Priority
Integer

9. Set the **Name** of the new field to **"PUL Ticket ID"**.

Add a field to Product Backlog Item

Definition

Add a field to store custom, queryable data about your work items.

☐ Use an existing field

Field: Acceptance Criteria

☒ Create a field

Name: PUL Ticket ID

Type: Text (single line) ▼

10. On the **Layout** tab, set the **Label** to “Ticket ID”. Also **Create a new group** for “PartsUnlimited”. Click **Add field**.

Definition

Options

Layout

Choose how the field is displayed on the work item form.

Label: Ticket ID

Page: Details ▼

☐ Select existing group

Group: Details

☒ Create new group

Group: PartsUnlimited

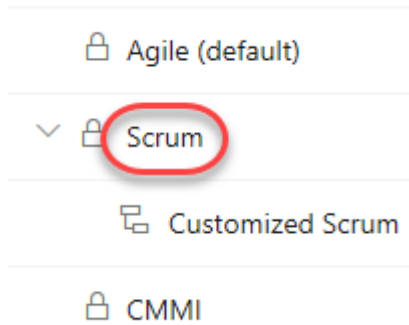
Add field Cancel

11. Now that the customized process has been configured, let's switch the Parts Unlimited project to use it. Return to the **All processes** root using the breadcrumb.

All processes > Customized Scrum > Product Backlog Item

Layout States Rules

12. Our project currently uses **Scrum**, so select that process.

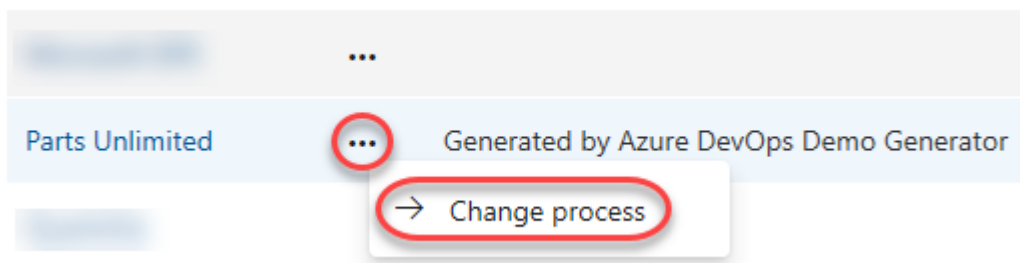


13. Switch to the **Projects** tab.

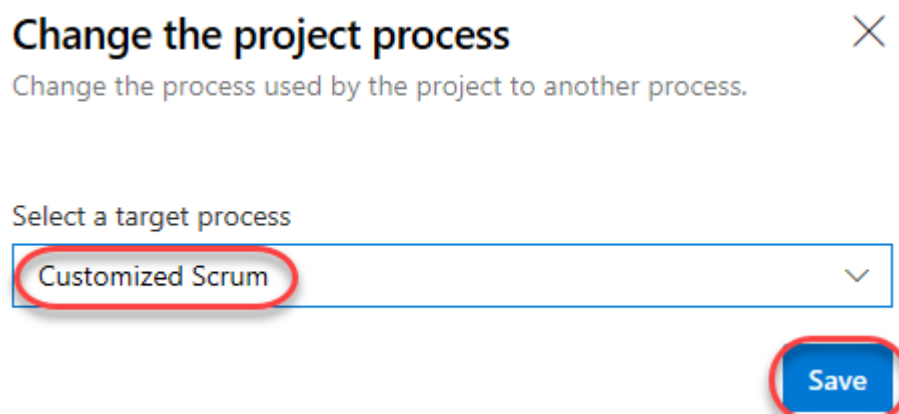
All processes > Scrum

Work item types Backlog levels Projects

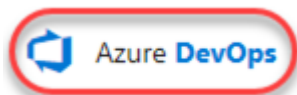
14. From the context menu for **Parts Unlimited**, select **Change process**.



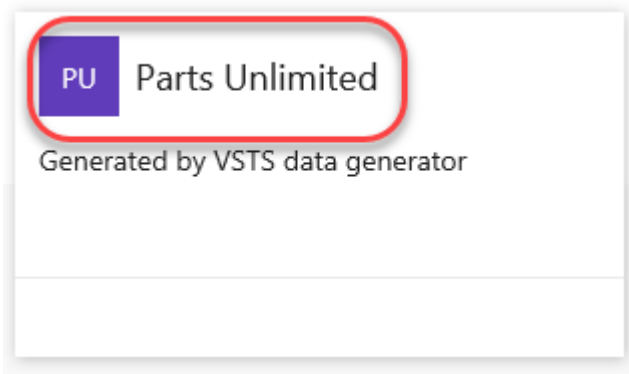
15. Select the **Customized Scrum** process and click **Save**.



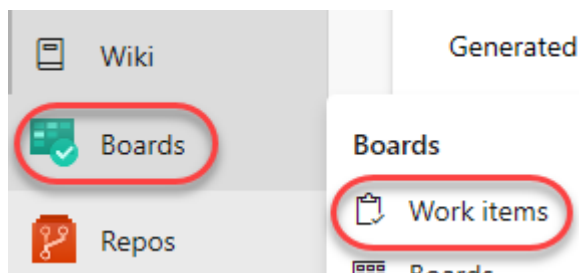
16. Return to the account dashboard using the logo link.



17. Open the **Parts Unlimited** portal.



18. Select **Boards | Work Items**.



19. Open the first backlog item.

ID	Title
✓ 6407	As a customer, I want to see tutorials I recently viewed
6408	As a customer, I want to request new tutorials

20. You will now see the **Ticket ID** field under the **PartsUnlimited** group defined during the process customization. You can treat this like any other text field.

Acceptance Criteria

Click to add Acceptance Criteria

PartsUnlimited

Ticket ID

PUL-1234

Discussion

21. Once the work item is saved, Azure DevOps will also save the new custom information so that it will be available for queries and through the rest of Azure DevOps.