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| 3M – Corporate Research Lab – SEMS Lab |
| Team Onboarding |
| Enterprise Team Foundation Server |

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| Mike O'Brien  7-28-2014 |

# Foreword

As new Teams within 3M have a desire to start using the Enterprise Team Foundation Server (ETFS) service, they will go through an Onboarding process to familiarize the team with ETFS.

# Onboarding Workflow



# Initial Meeting

Presentation of capabilities of Team Foundation Server

Source Control

Requirements Management

Introduction to Enterprise TFS

# Team Interview

The Team Interview would be performed by the ETFS Solutions team, as they are responsible for new team Onboarding. Below is an outline of information needed for the onboarding process.

Collect information on Team(s):

## Team Project Collection / Team Project(s)

Follow the Team Project Creation workflow

* Team Project requires isolation from other Team Projects
* Is Active Directory sufficient isolation?
* Is Area Paths sufficient isolation?
* Will team artifacts (source code, work items links) be shared across multiple Team Projects?
* Is the security model supported by an existing Team Project Collection?

## Identify Team Roles

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| --- | --- |
| Role | Active Directory Group |
| Project Administrators | US-*TeamProjectName*-ProjectAdmin |
| Contributors | US-*TeamProjectName*-Contributors |
| [Team Name] | US-*TeamProjectName*-*TeamName* |
| Builders | US-*TeamProjectName*-Builders |
| Viewers | US-*TeamProjectName*-Viewers |
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|  |  |

## Number of members

* License – Standard vs. Full (MSDN)

|  |  |
| --- | --- |
| Access Level | Active Directory Group |
| Full | US-*TeamProjectName*-Full-Access |
| Standard | US-*TeamProjectName*-Standard-Access |
| Limited | US-*TeamProjectName*-Limited-Access |

* Active Directory Groups for teams / members

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| --- | --- |
| Role | Active Directory Group |
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| Contributors | US-*TeamProjectName*-Contributors |
| [Team Name] | US-*TeamProjectName*-*TeamName* |
| Builders | US-*TeamProjectName*-Builders |
| Viewers | US-*TeamProjectName*-Viewers |

## Source Control – if existing system

* 1. Existing TFS or Non-TFS?
  2. Can you keep current system running (archive existing work)?
  3. Migration type – migrate current project artifacts manually , or migrate with history

## Work Items / Plans

* 1. Existing System (if any)

# Training

The Training Curriculum is based on the Microsoft Visual Studio Scrum 2013 Template and Process Guidance. The following presentations would be presented to the respective team at a pace that reflects their usage of TFS, i.e., current users of TFS would have an accelerated pace vs. non-TFS users.

1. Intro
2. Source Control
3. Work Items
4. Scrum/Agile usage (Terminology)
5. SharePoint Portal
6. Reports

A key tenant is to Train in Context by demonstrating everyday uses of TFS for each of the appropriate user roles for a project.

## Hands-on Labs

Hands on Labs are modules of functionality that are adapted to user roles. An individual on a team may perform one or more roles, and thus may perform multiple Hand on Labs to explore the functionality of TFS.

1. Common Exercises
   1. Context
   2. Starting Visual Studio Environment
   3. Connecting to ETFS
   4. Connect to Team Project
2. Developer Exercises
   1. Get latest source code
   2. Check out source
   3. Check in source
   4. Update tasks
   5. Request Code Review
   6. Team Build – Create, Queue build, debug
   7. Alerts
3. BA Exercises
   1. Create Backlog Item
   2. Check in source
   3. Update tasks
   4. Save document to SharePoint portal (shared docs)
4. Tester Exercises
   1. Get latest source code
   2. Check out source
   3. Check in source
   4. Update tasks
   5. MTM – create Test Case
   6. MTM – perform Test Run
   7. MTM – create Test Plan
5. Project Manager/Scrum Master Exercises
   1. Create Product Backlog Item
   2. Update Product Backlog Item
   3. Create Task
   4. Update tasks
6. Stakeholder Exercises
   1. Create Feature
   2. View Team Status – current work in progress (Sprint)
   3. View Impediments

# Migration

1. Solutions Team performs setup/dev, test on QA, and project migration to PROD environment
   * Migration of Team / Project back log
   * Migration of latest version of source code
2. Build and Proxy machines provisioned - connected to ETFS
3. [optional] Migration of project artifacts to ETFS with highest fidelity

TFS Integration Tools – Checklist for migration

|  |  |  |
| --- | --- | --- |
| Source | Source | Target |
| System (TFS/IBM/SVN) |  |  |
| Team Project Name |  |  |
| Source Control |  |  |
| Work Items |  |  |
| Work Item Attachments |  |  |
| Process Template\* |  |  |
| Area Path |  |  |
| Iterations |  |  |
| Security - team members |  |  |
| Team Builds |  |  |
| Test Cases (Y/N) |  |  |

\* If Source and Target Process Template differ, a source -> target field mapping needs to be completed

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| Resources |
| Team Foundation Server Migration and Integration Solutions  <http://msdn.microsoft.com/en-us/vstudio/bb840033.aspx?ppud=4>  Test Case Migrator Plus  <http://tcmimport.codeplex.com/> |

# Go Live

Go Live is the transition of the team(s) to start leveraging ETFS on a scheduled date and time. Key to successful adoption is preparing the team for the transition, and obtaining buy-in from the team to leverage the capabilities.

When a team switches, a few things happen:

* The team members have appropriate permissions already setup under the existing Team Project
* Relevant work artifacts (work items and source code) have been previously migrated
* The ‘former system’ used is put into Read-Only mode
* If the ‘former system’ is TFS, the contents of the previous Project Collection may be available in a Read-Only Project Collection

# Maintenance

After a team has been successfully on boarded onto ETFS, the Relationship Manager will stay in contact. Key items to monitor on a regular basis are include

* Are needs being met? Does ETFS provide the necessary functionality?
* Projects running smoothly?
* Training helpful? Anything missing?
* Methodology working?

This is also an excellent time for the team to provide feedback on the on boarding process. The team strives for continual improvement, and feedback into the process (good or bad) helps us improve.