WorkshopPLUS - Azure DevOps Services: Essentials

Lab Guides

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Module 7: Azure Boards - Plan and Track Projects

Lab 1: Azure Boards - Plan and Track Projects

Introduction

In this lab, you will learn how Azure DevOps Services 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 an iteration.

Exercise 1: Managing Sprints and Capacity

Exercise 2: Kanban Boards

Exercise 3: Defining Dashboards

Exercise 4: Managing Delivery Plans

Objectives

After completing this lab, you will be able to:

- Plan and manage team capacity
- Use the task board
- Use the Kanban board
- Define dashboards

Prerequisites

- Lab 2: PartsUnlimited Lab Setup

Estimated Time to Complete This Lab

45 minutes

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 1: Managing Sprints and Capacity

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Exercise 1: Managing Sprints and Capacity

Objectives

In this exercise, you will learn how to:

- Manage capacity planning
- Customize taskboard

Prerequisites

None

Scenario

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.

Tasks

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 1: Managing Sprints and Capacity

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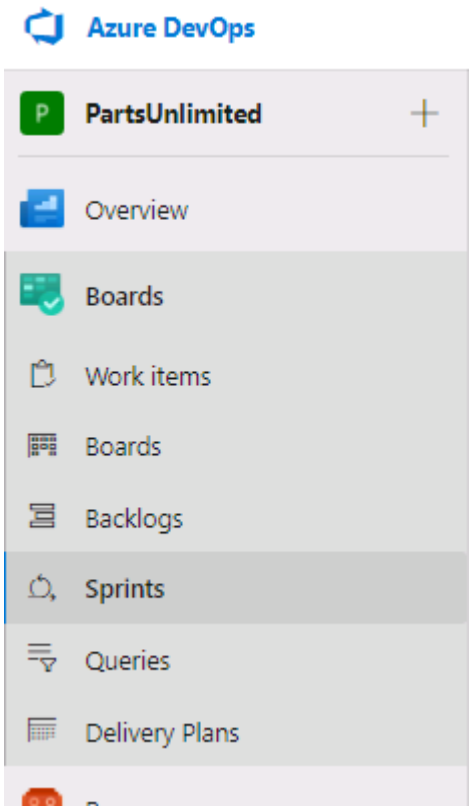
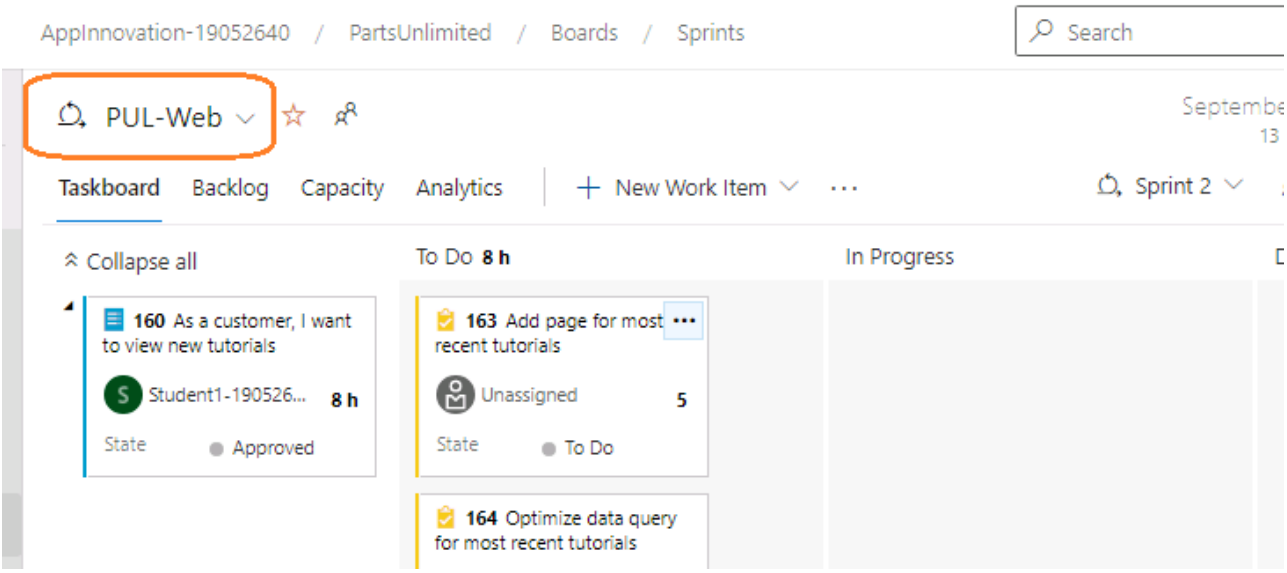
Task 1: Capacity Planning

1. Navigate to the web browser to the **PartsUnlimited** project in Azure DevOps Services.
2. Navigate to the **Boards | Sprints**.

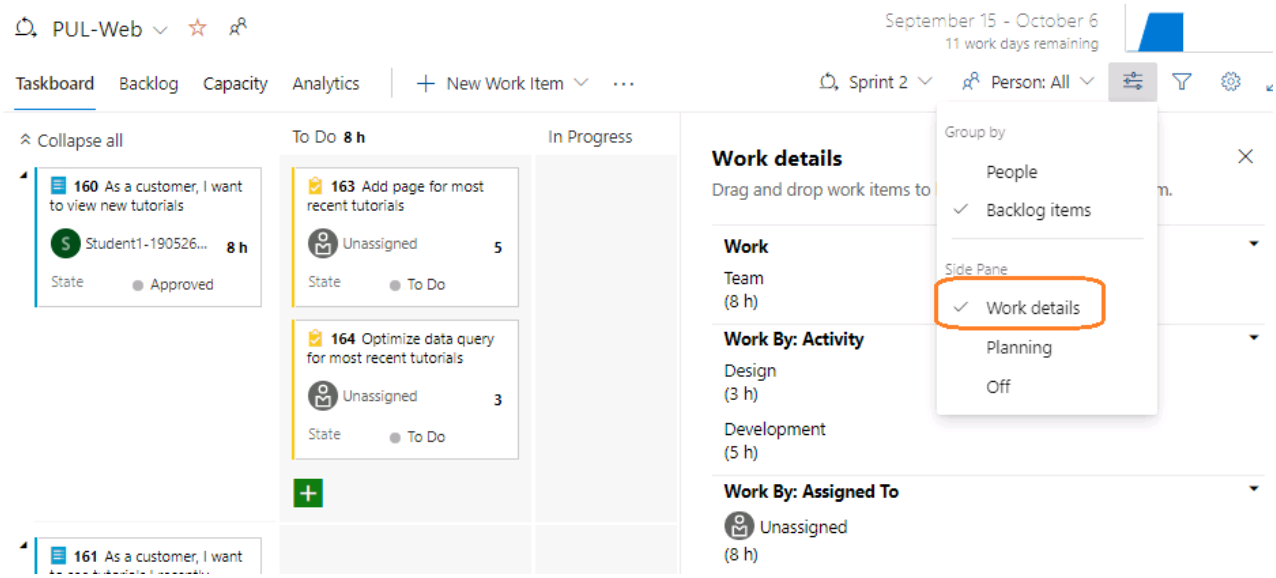
> Your sprint backlog should contain all the information your team needs to successfully plan and complete work within the time allotted without having to rush at the end. Before you start planning your sprint, you'll want to have created, prioritized, and estimated your backlog and defined your sprints.



3. Be sure you have selected **PUL-Web** team's sprints.

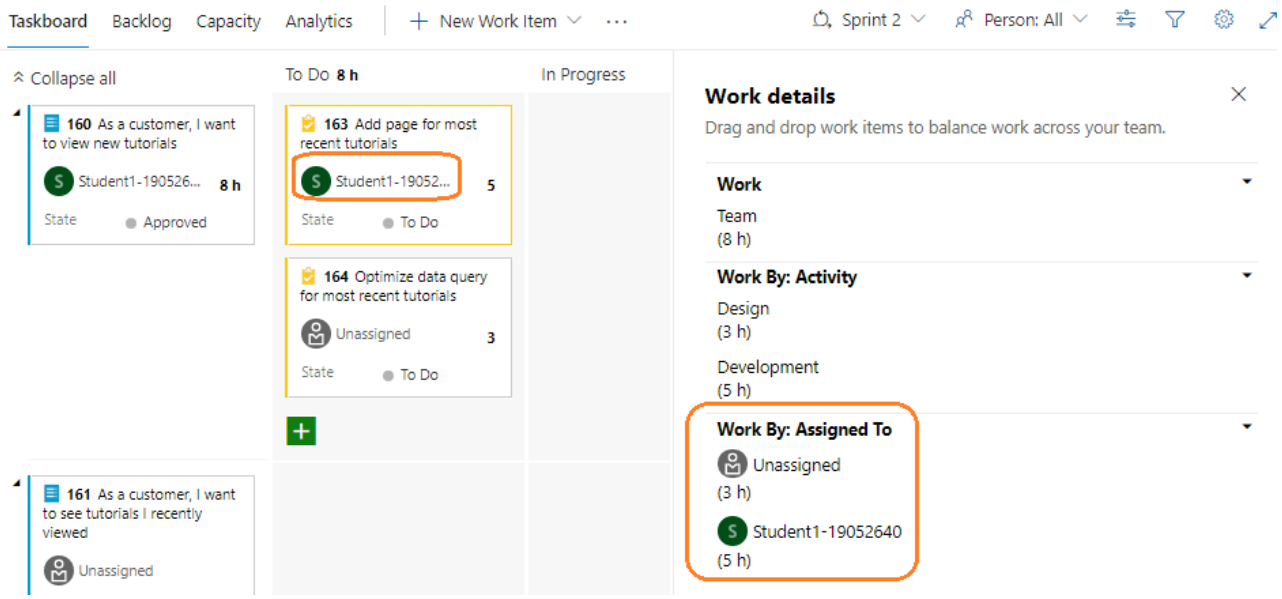


4. From the **View options**, select the **Work details** Side Pane option.

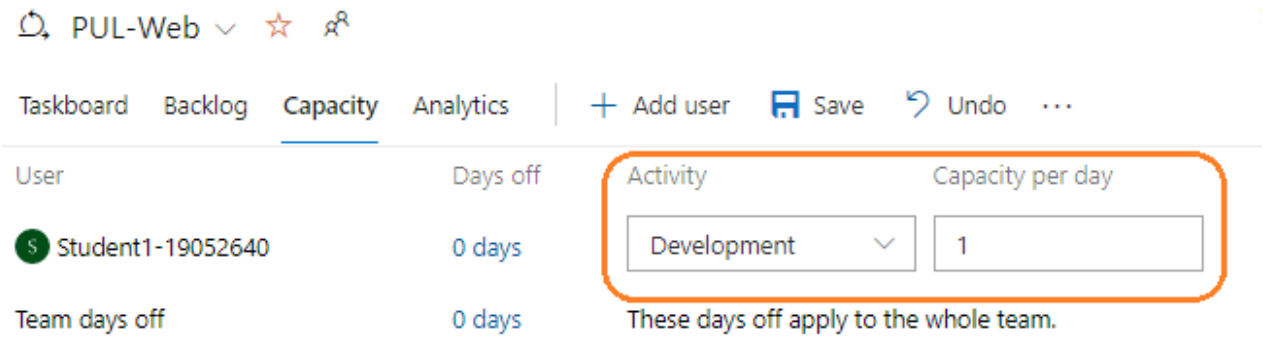


5. The current sprint has a pretty limited scope. There are two tasks in the *To Do* stage that combine for 8 hours of estimated work. At this point, neither task has been assigned.

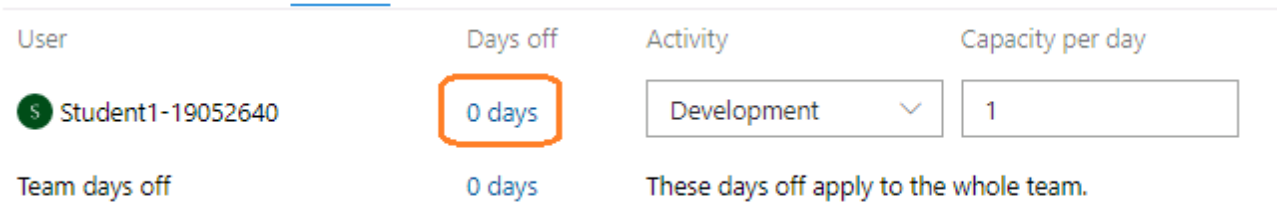
6. **Assign** the **Add page for most recent tutorials** task to youself. Note that this updates the **Work details | Work By: Assigned To** view.



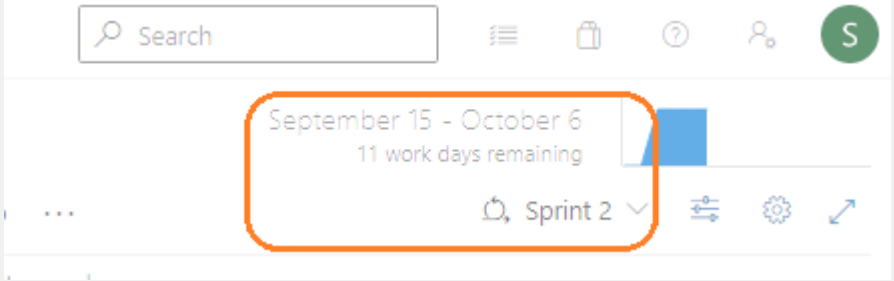
7. Select the **Capacity** tab. This view enables you to define what activities a user can take on and at what level of capacity. In this case, set your capacity to allow **1** hour of **Development** Activity per day. Note that you can add additional activities per user in the case they do more than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



8. However, let's assume that you are going to take some vacation. Click **0 days** under Days off for your name.



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

> You can check the duration of the current sprint at the top-right corner on the **Sprints** page.
>
> 
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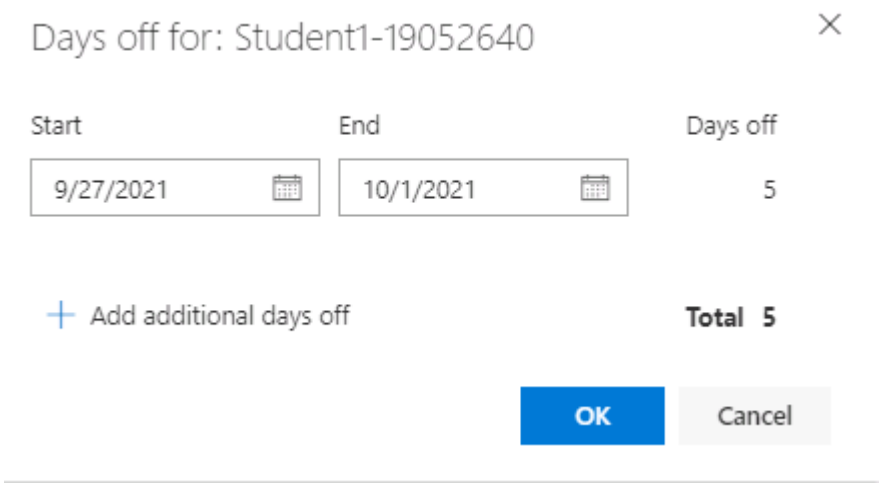
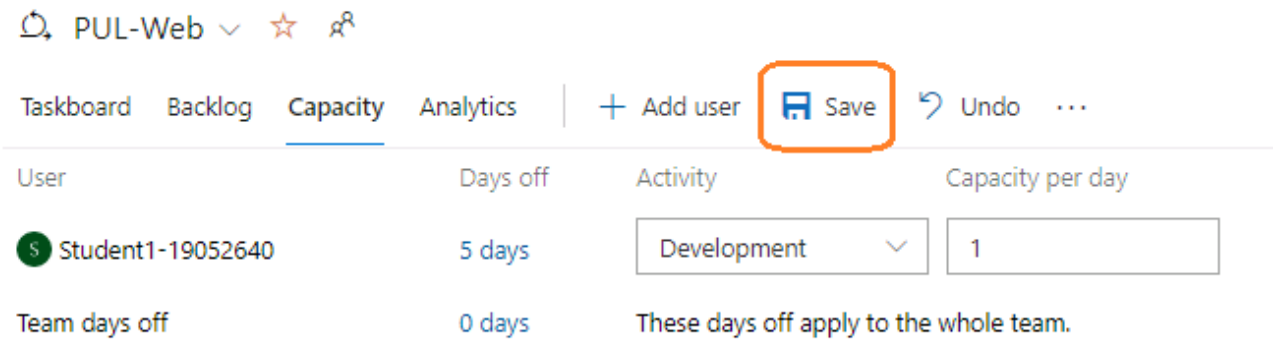
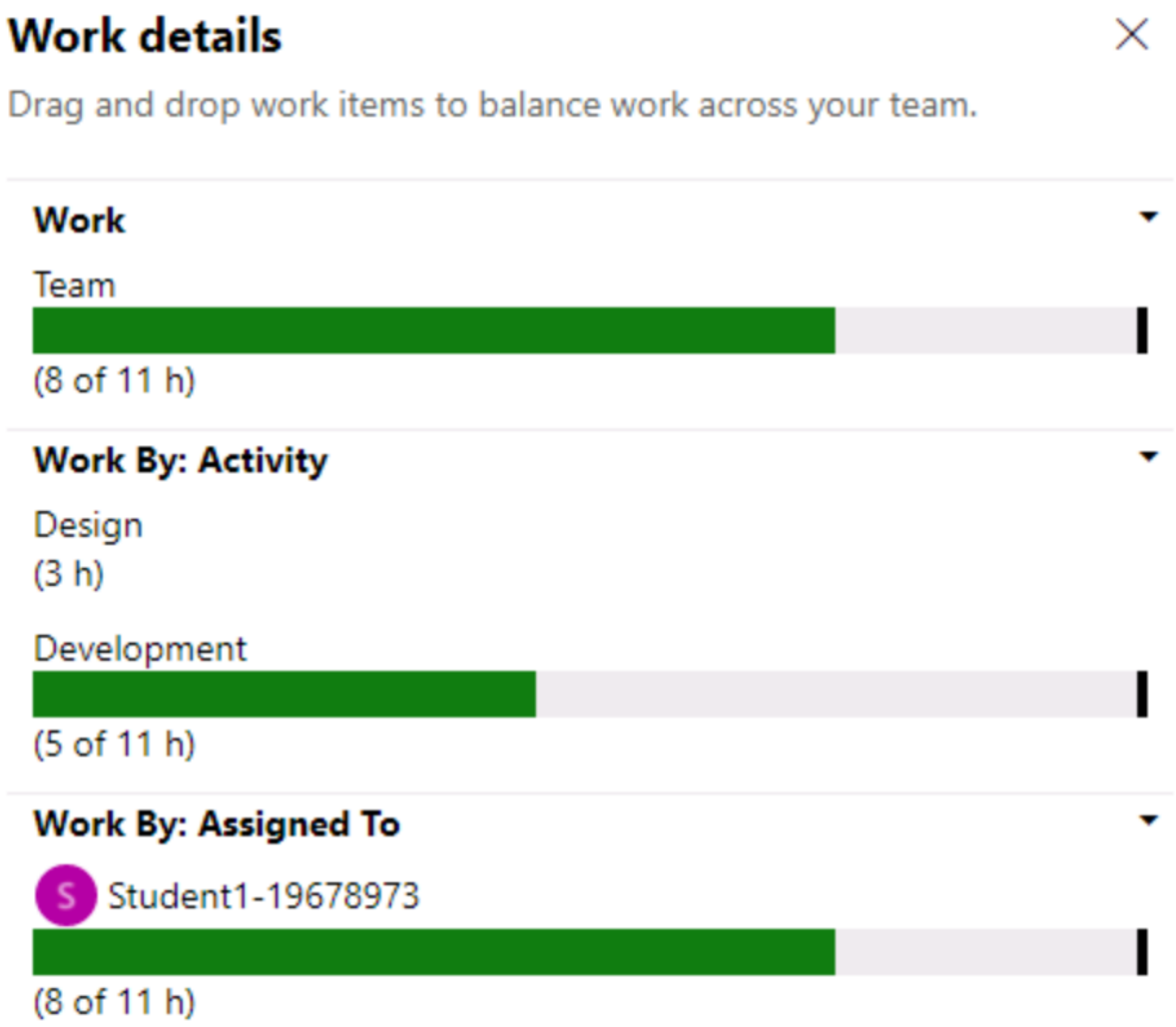


10. Click **Save**.

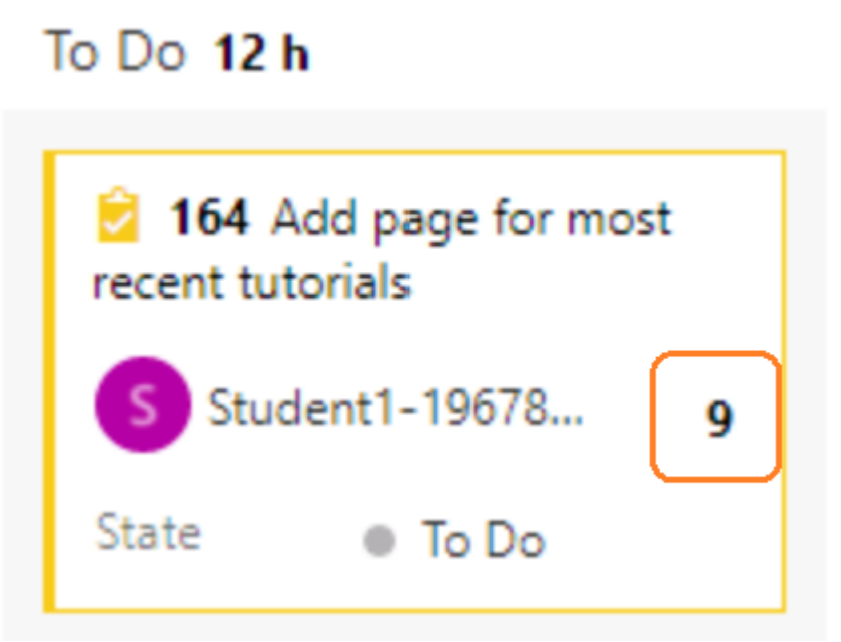


11. Return to the **Taskboard** tab for the current sprint of the **PUL-Web** team.

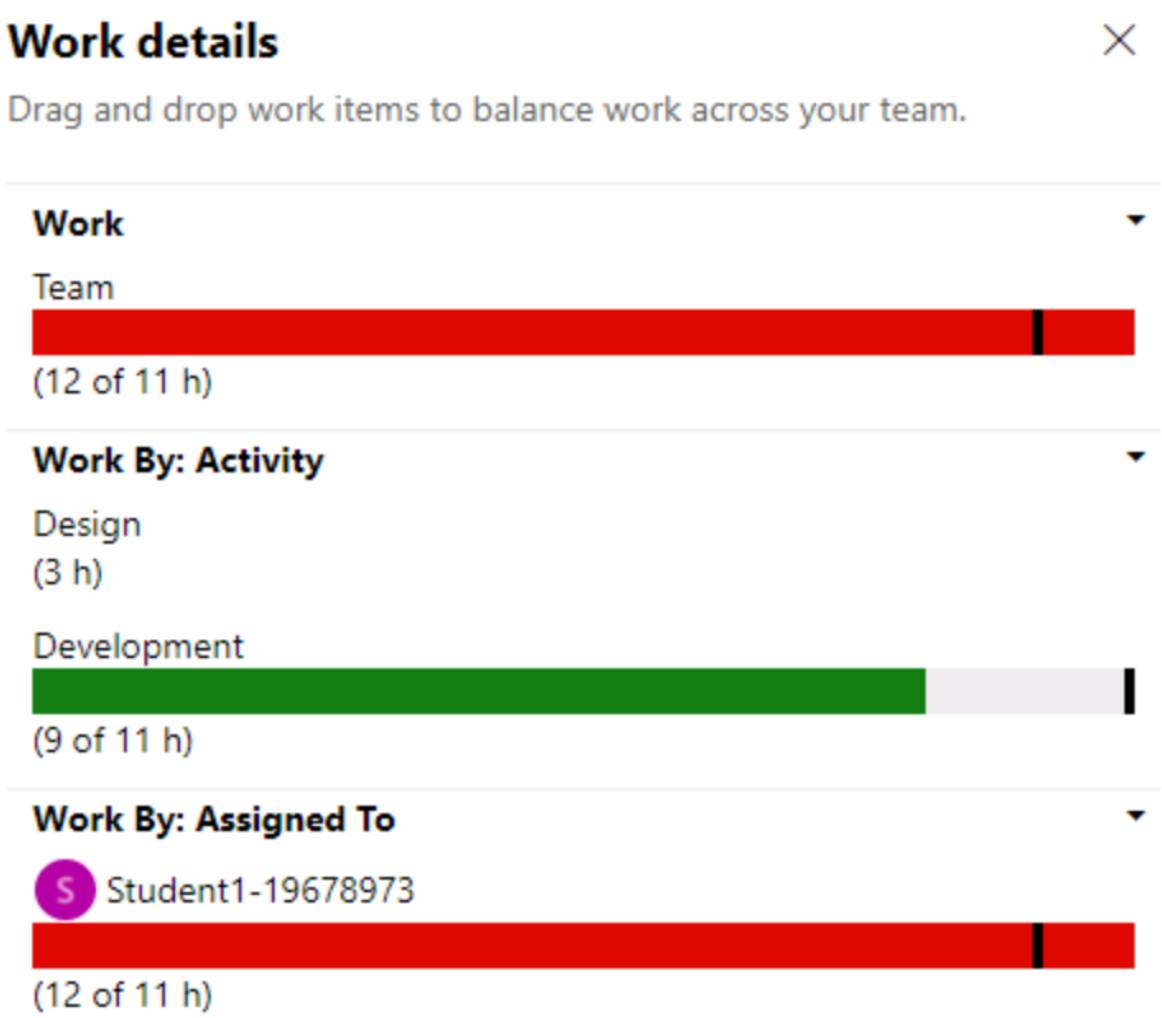
12. Note that the capacity view has been updated to reflect your available bandwidth. This exact number may vary, but for the screenshots here, that sprint capacity is 11 hours (1 hour per day over 11 working days).



13. 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 for most recent tutorials** task and found that it will actually take longer than originally expected. Set the **Remaining Work** for this task to **9**.



> Note how this modifies Work Details. In this particular example, while **Development** capacity is still green, **Team's** capacity as well as your capacity is already exceeded.



14. 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.

At a glance, you can see that the current iteration runs from October 21 to November 11, with 16 work days remaining.

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 1: Managing Sprints and Capacity

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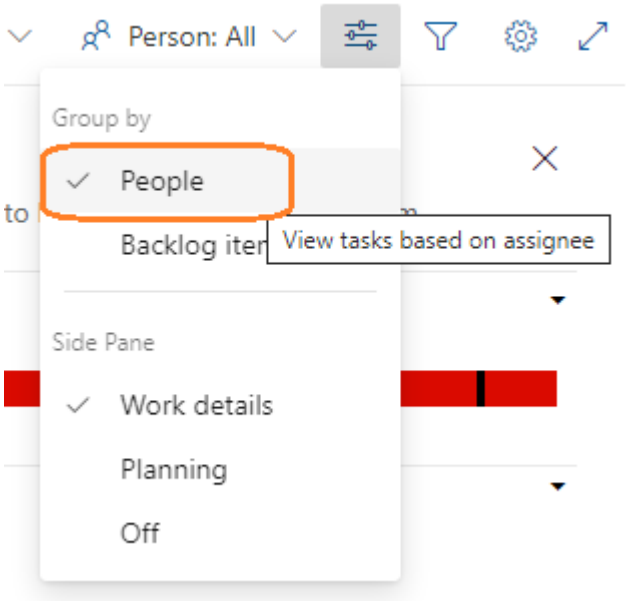
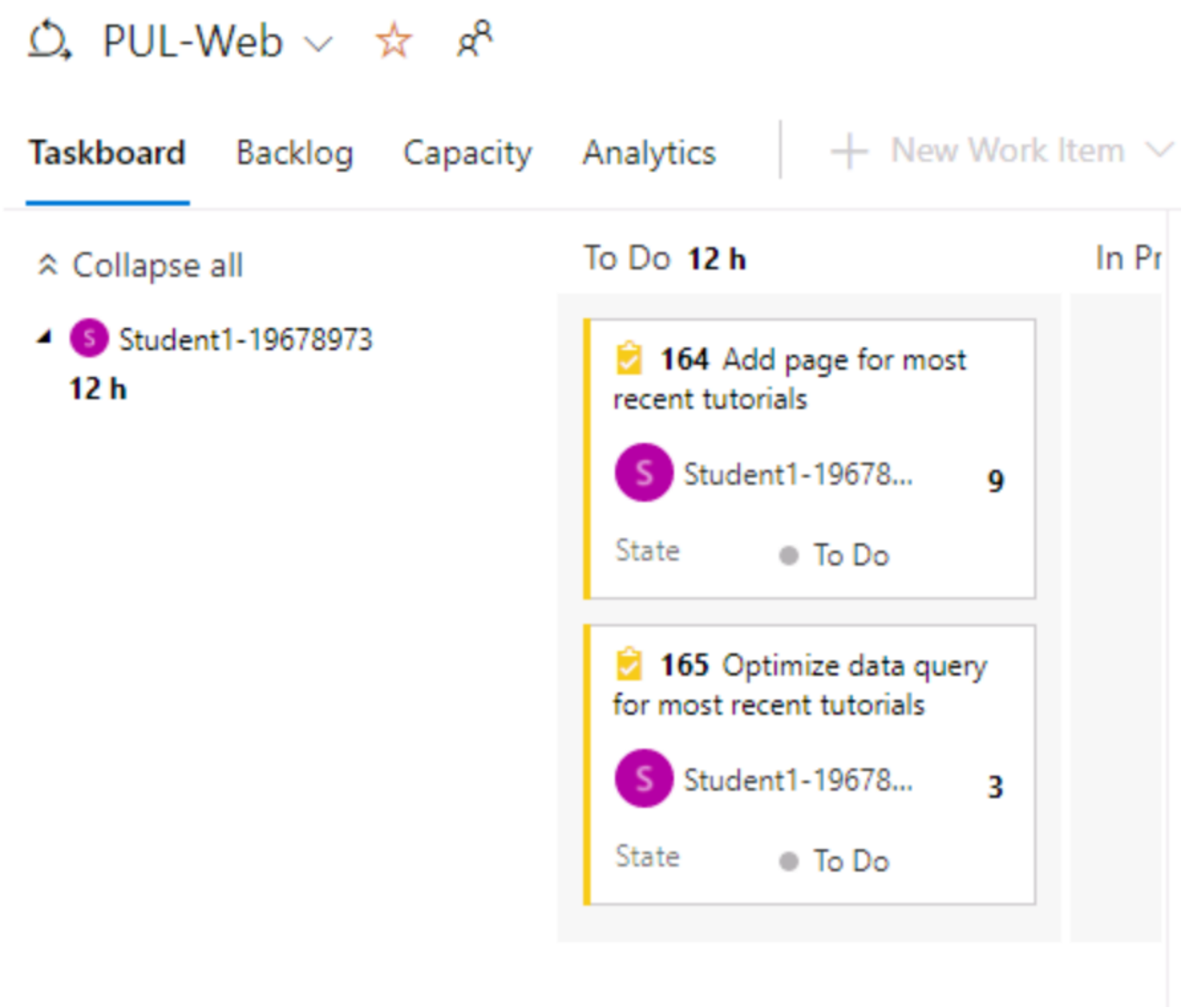
Task 2: Taskboard Settings

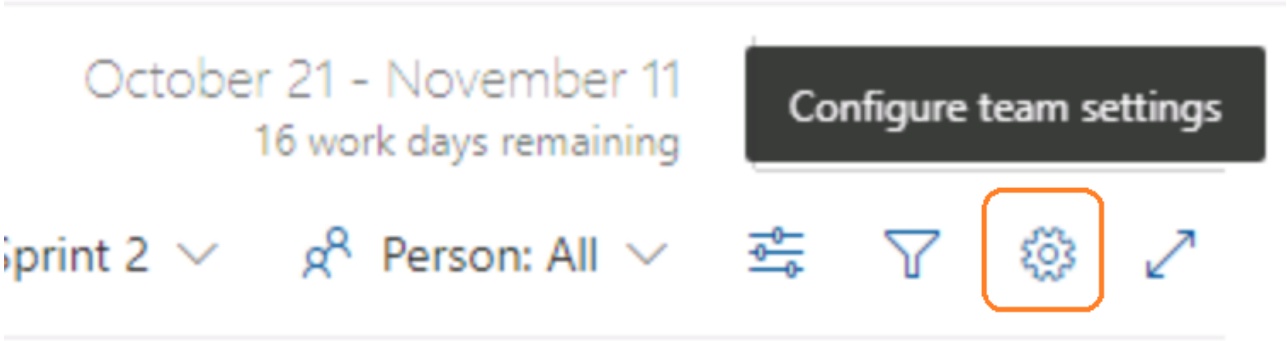
1. Return to the Taskboard view.
2. Select **People** from the **View options** dropdown.



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



4. There is also a lot of customization available. Click the **Configure team settings** button from the top-right corner.

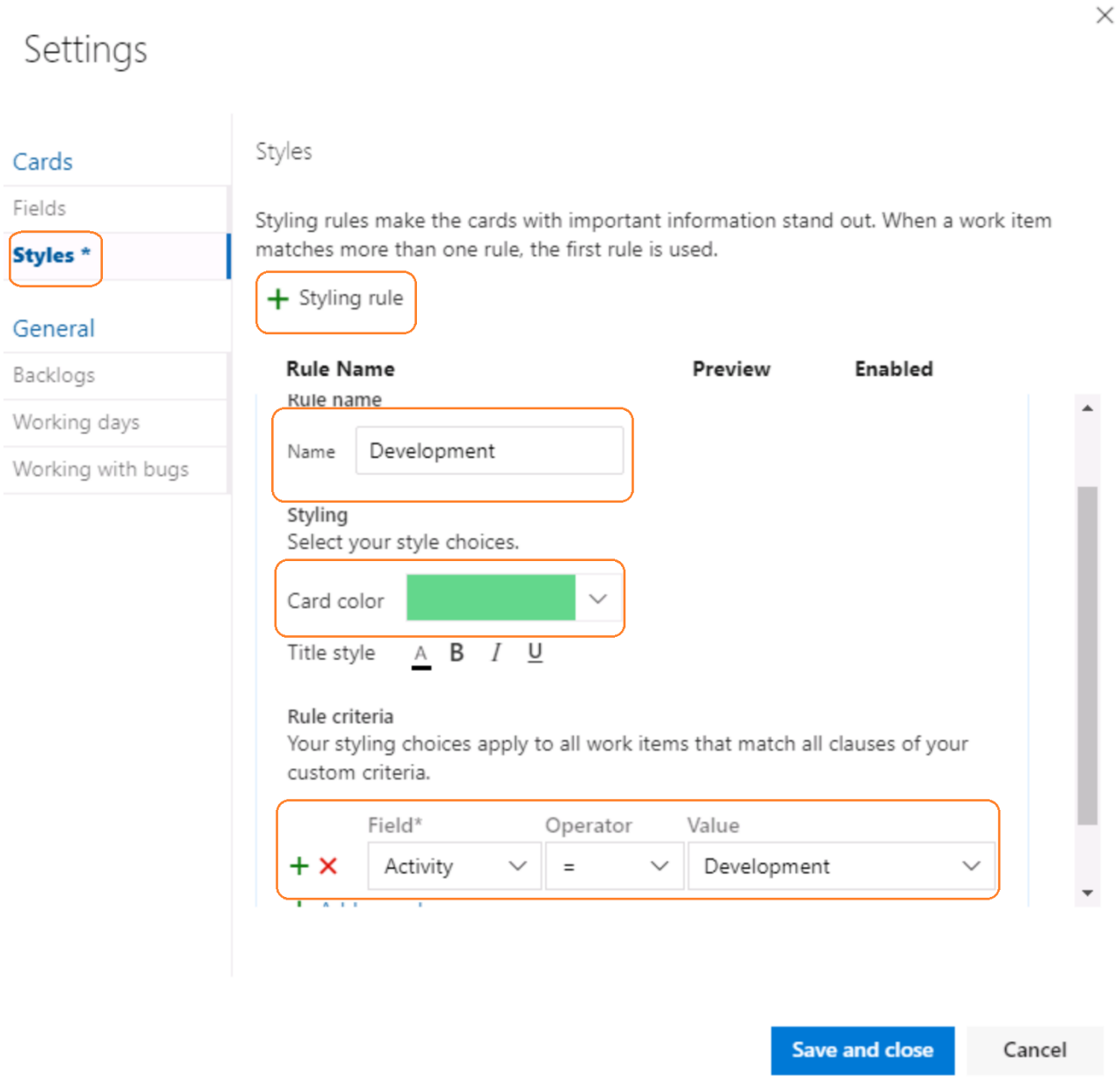


5. On the **Styles** tab, click **+ Styling rule** to add a styling rule as follows:

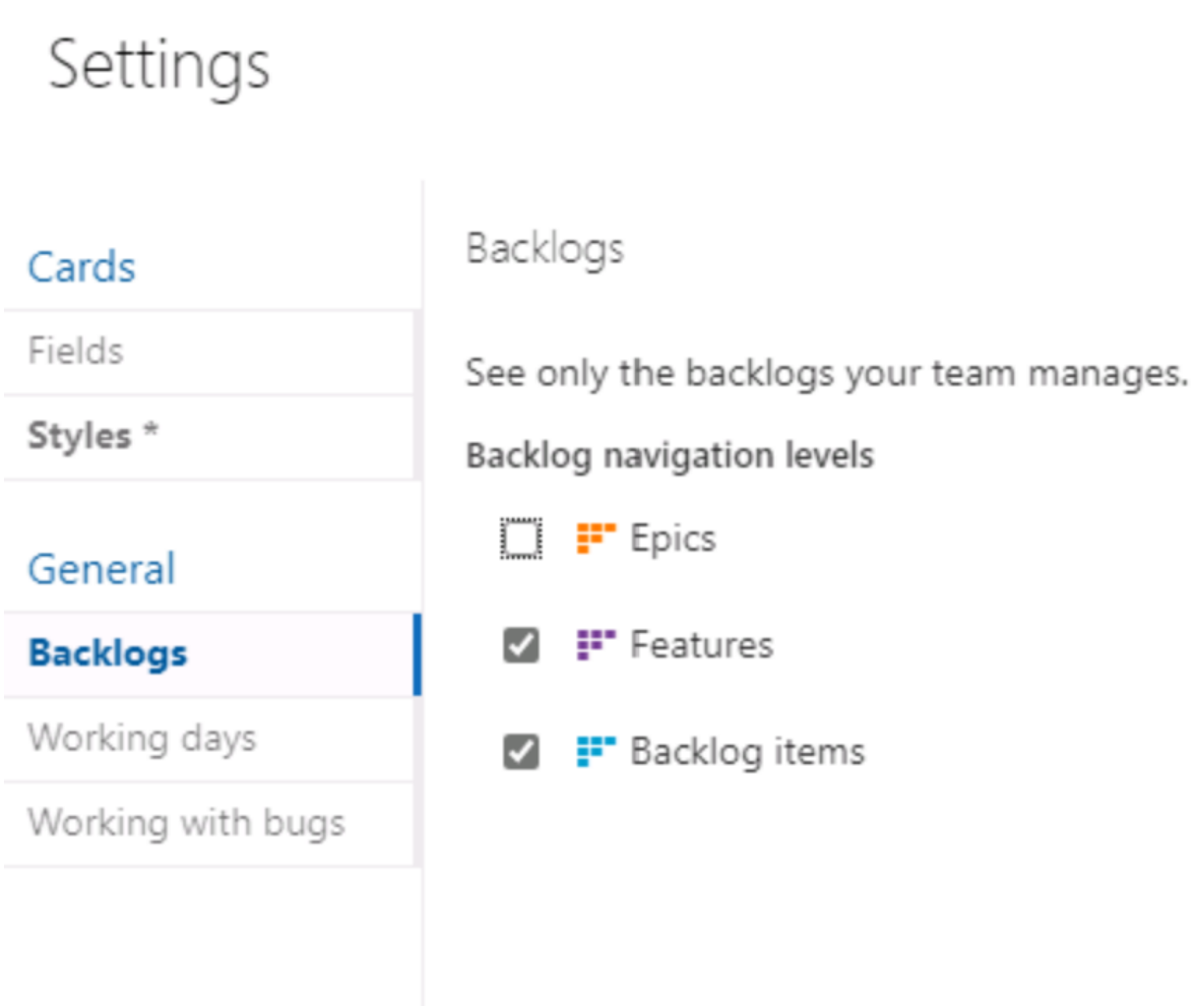
    - Set the **Name** to **Development**
    - Choose the **Card color** as green. This will color all cards green if they meet the rule criteria set below.
    - Under **Rule criteria**,
        - Set the Field to **Activity**
        - Operator as **=**
        - Value as **Development**.

DO NOT click *Save and Close* just yet.

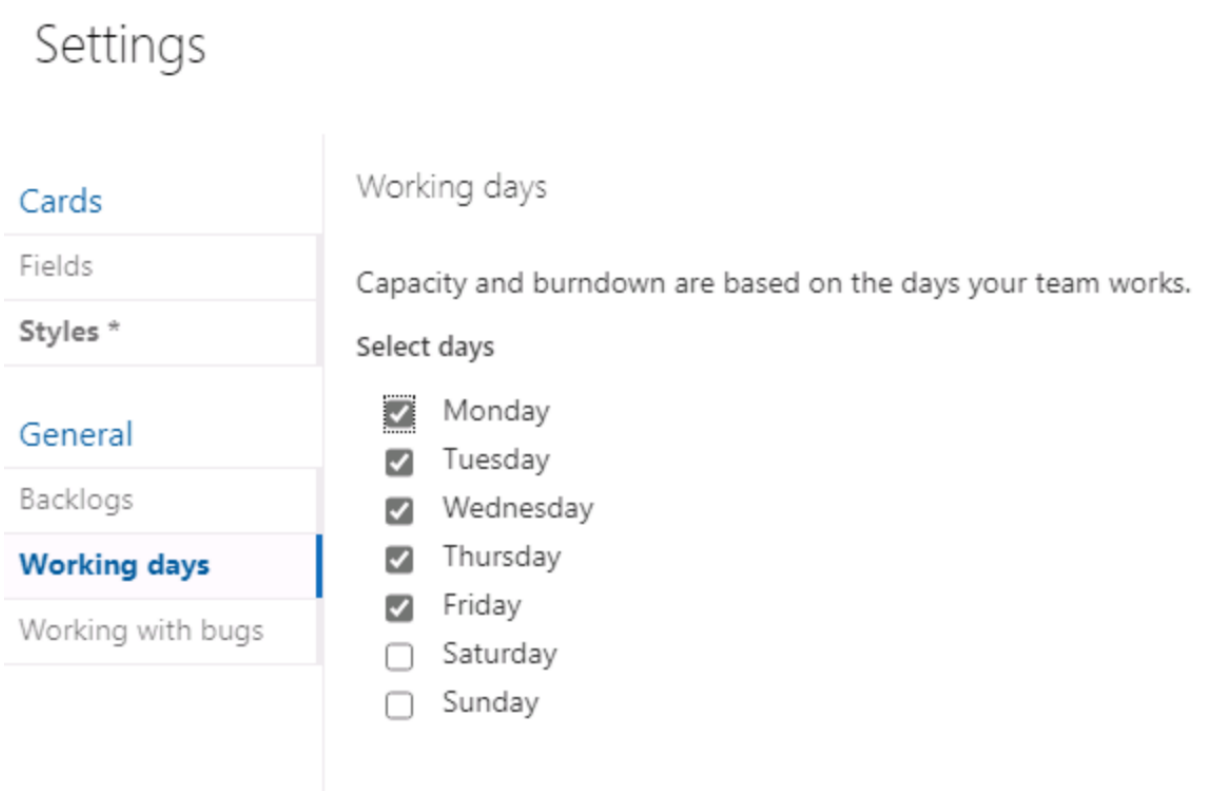
> This will set all cards assigned to Development activities green



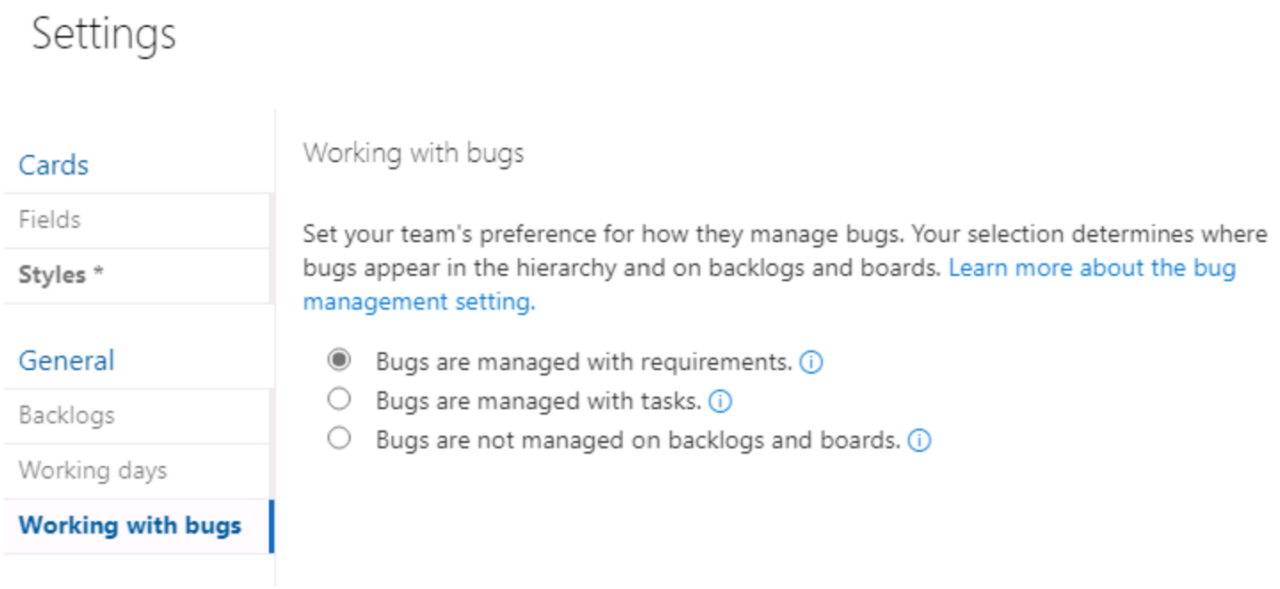
6. The **Backlogs** tab allows you to set the levels available for navigation. Epics are not included by default, but you could change that here.



7. In the **Working Days** tab, you can also specify the Working days the team follows. This applies to capacity and burndown calculations.

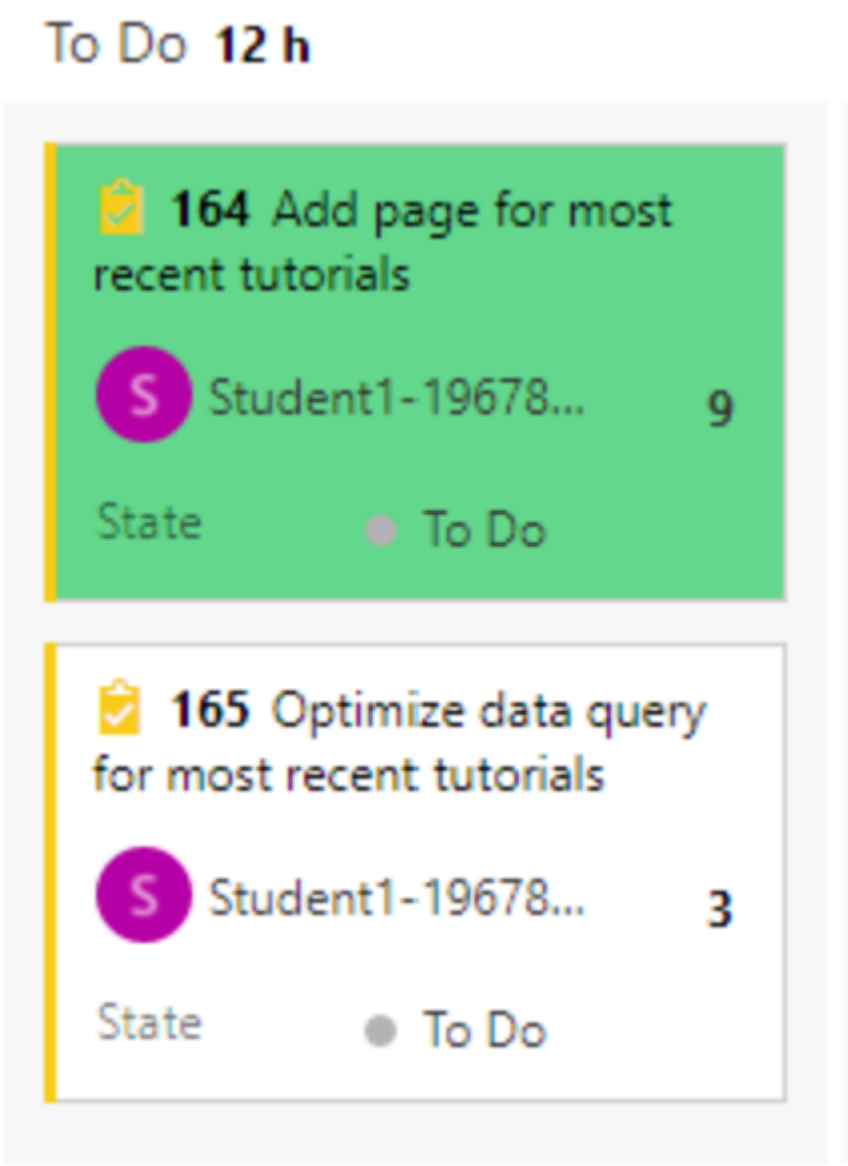


8. The **Working with bugs** tab allows you to specify how bugs are presented on the board.



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

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


To Do 12 h
164 Add page for most recent tutorials
S Student1-19678... 9
State To Do
165 Optimize data query for most recent tutorials
S Student1-19678... 3
State To Do

Exercise 2: Kanban Boards

Objectives

In this exercise, you will learn how to:

- Customize Kanban board.
- Move work items between states.

Prerequisites

None

Scenario

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.

Tasks

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 2: Kanban Boards

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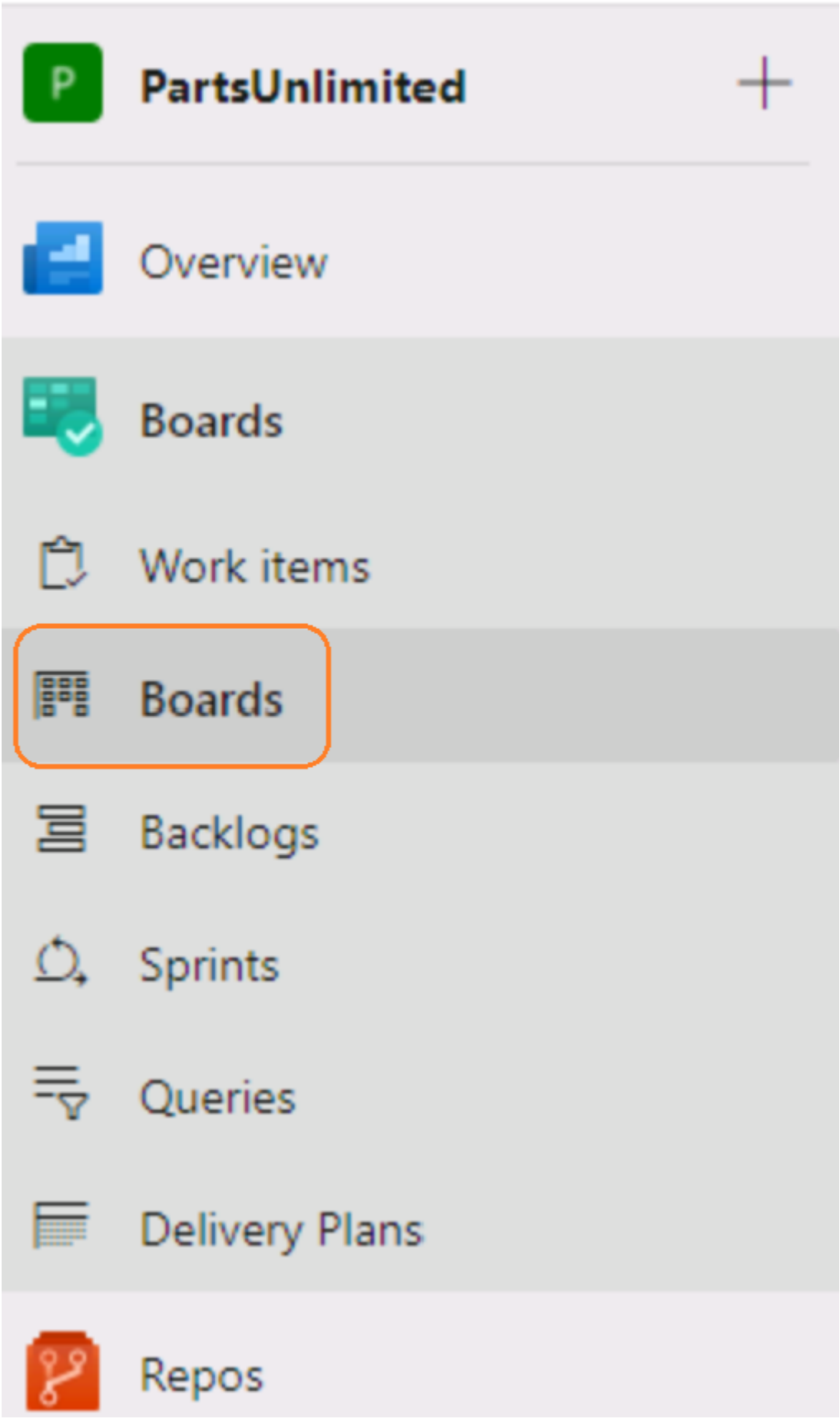
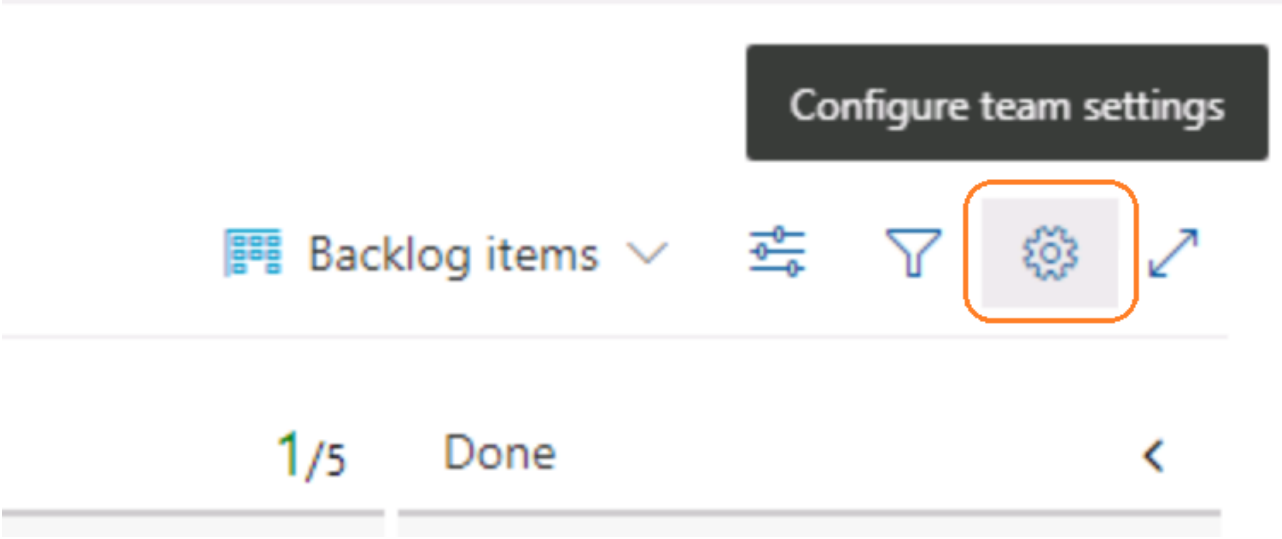
Task 1: Customizing Kanban Boards

1. In Azure DevOps Services in the browser, navigate to **Azure Boards | Boards** for PartsUnlimited project.

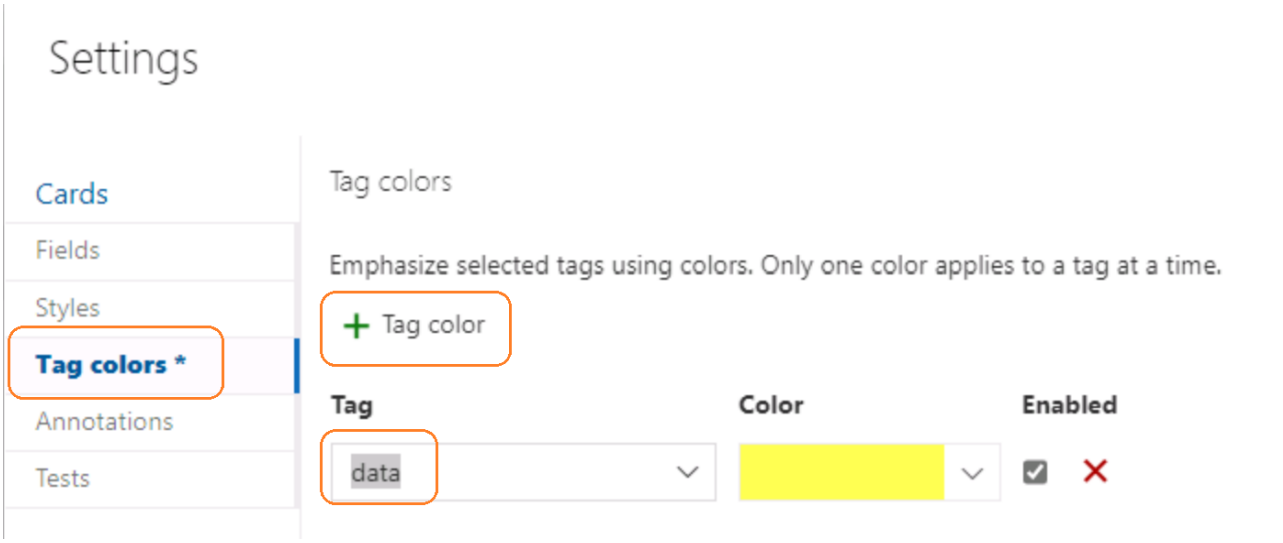


2. Click the **Configure team settings** button.

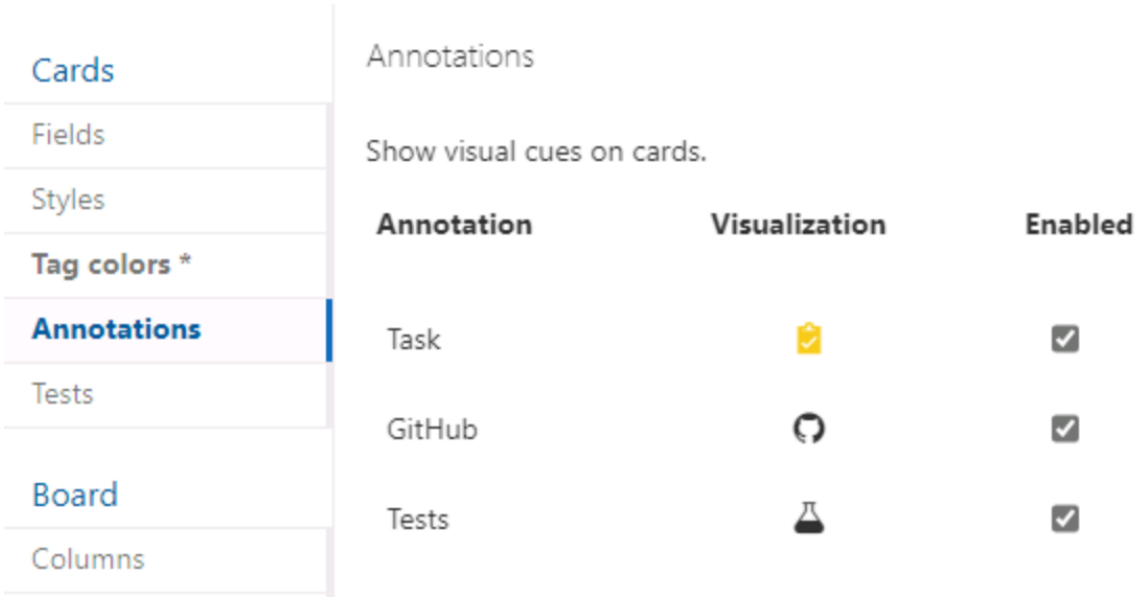


> Let's assume that the team is emphasizing work done with data and special attention is paid to any task associated with accessing or storing data. You want to highlight such tasks.

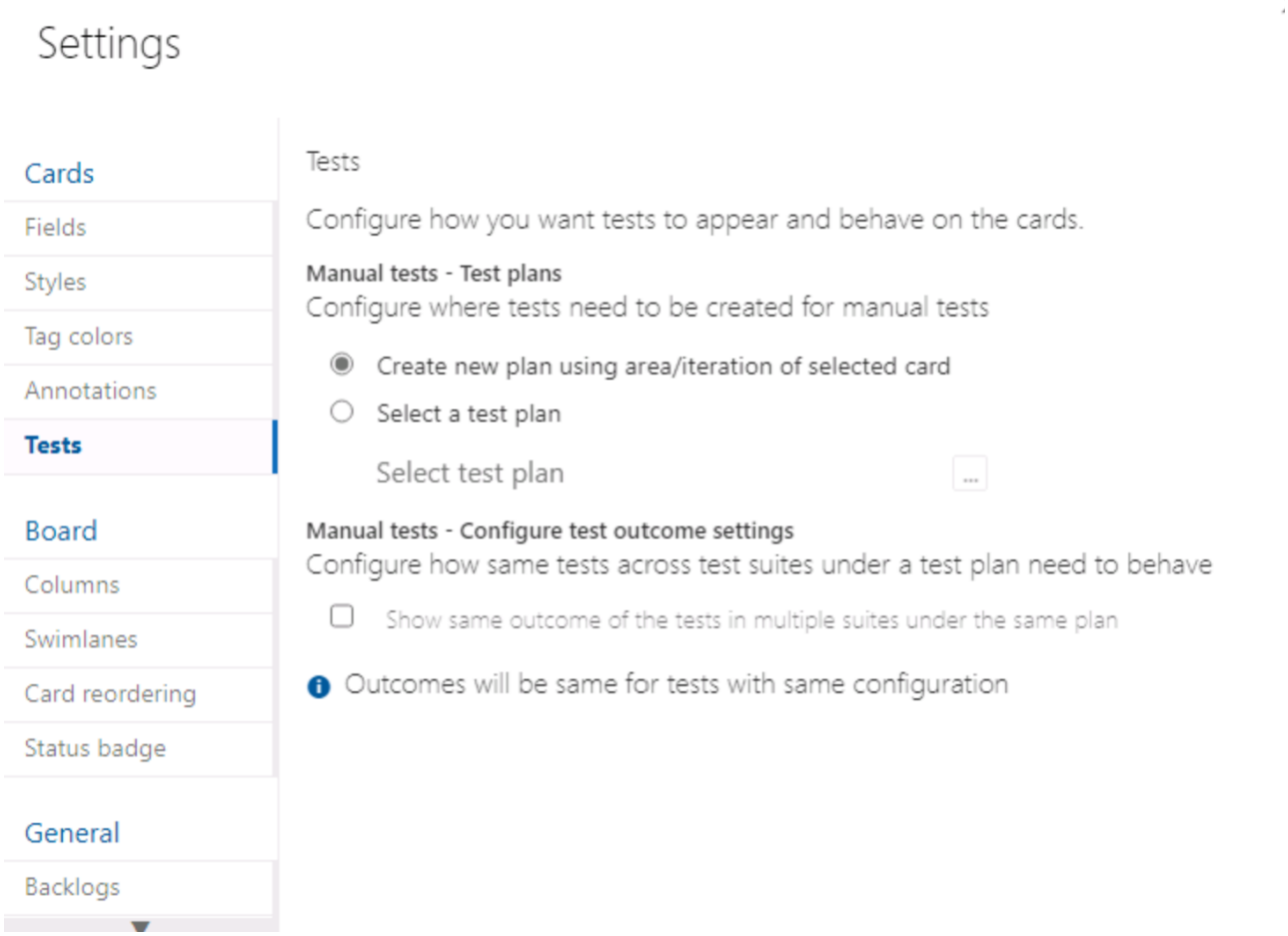
3. Select the **Tag colors** tab. Click **+ Tag color** and enter a **Tag** of **data**. Whenever a backlog item or bug is tagged with data, that tag will be highlighted.



4. In the **Annotations** tab, you can 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.

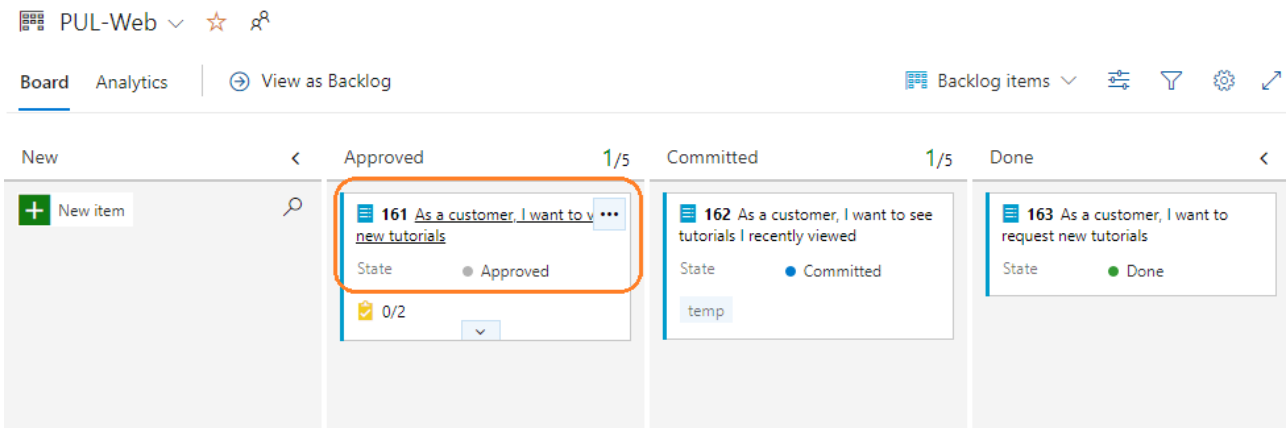


5. The **Tests** tab enables you to configure how tests appear and behave on the cards.

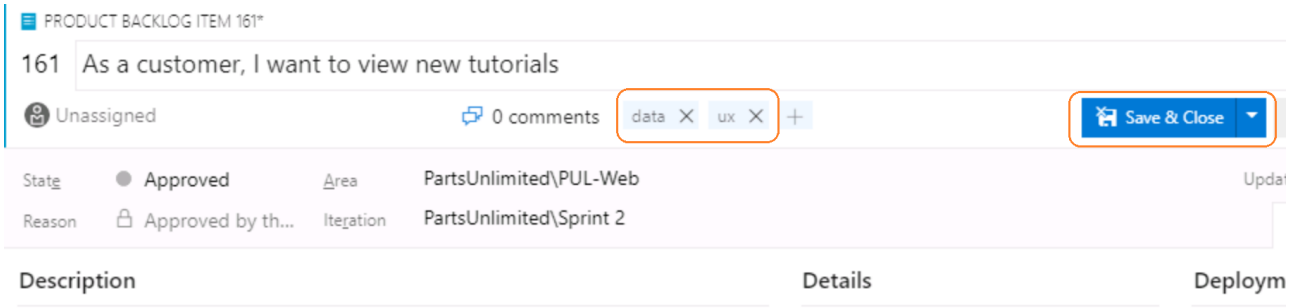


6. Click **Save and close**.

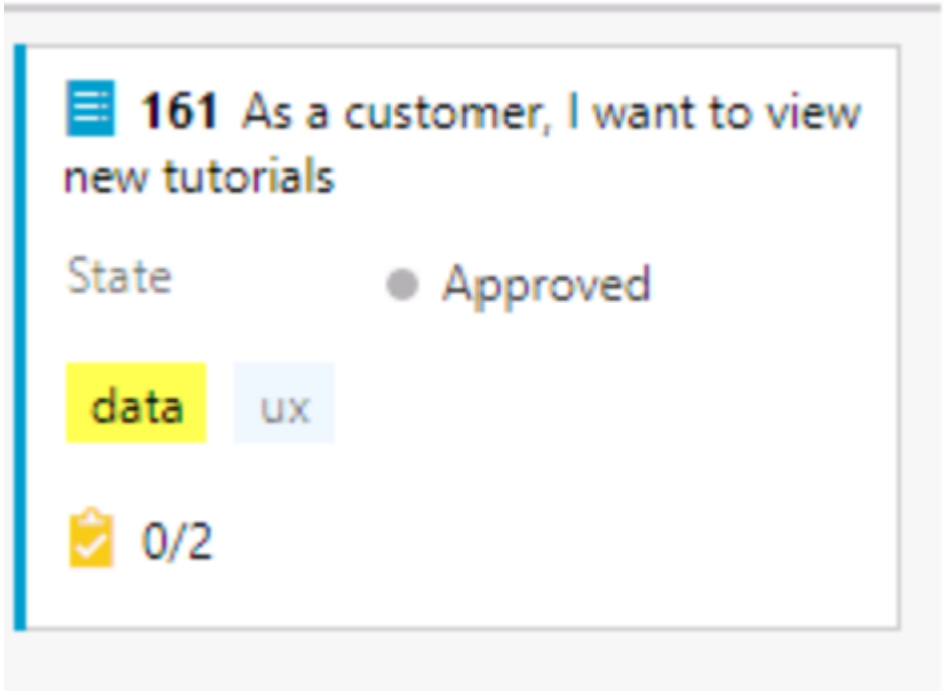
7. Open **As a customer, I want to view new tutorials** backlog item.



8. Add tags as **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.

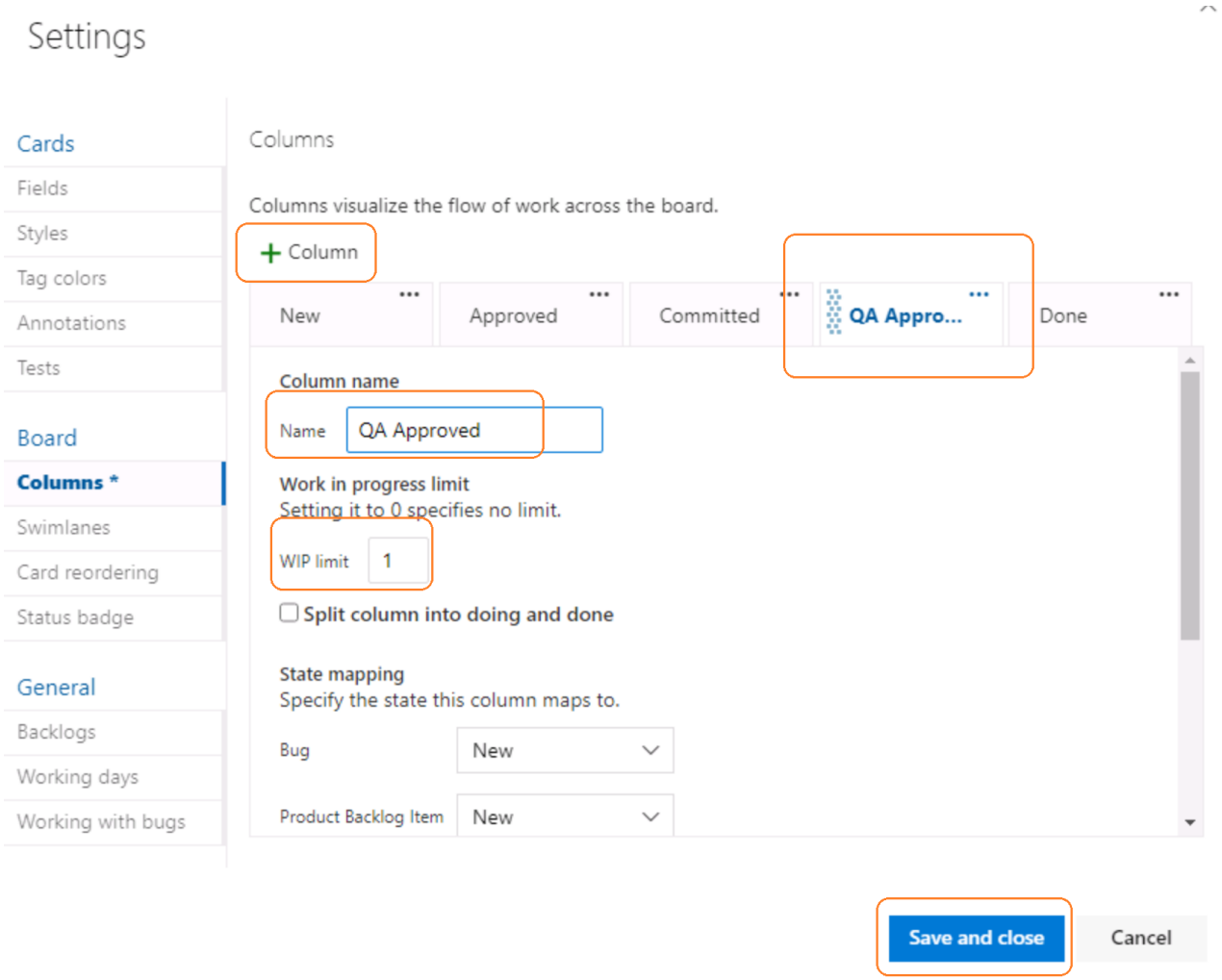


10. Click the **Configure team settings** button again.

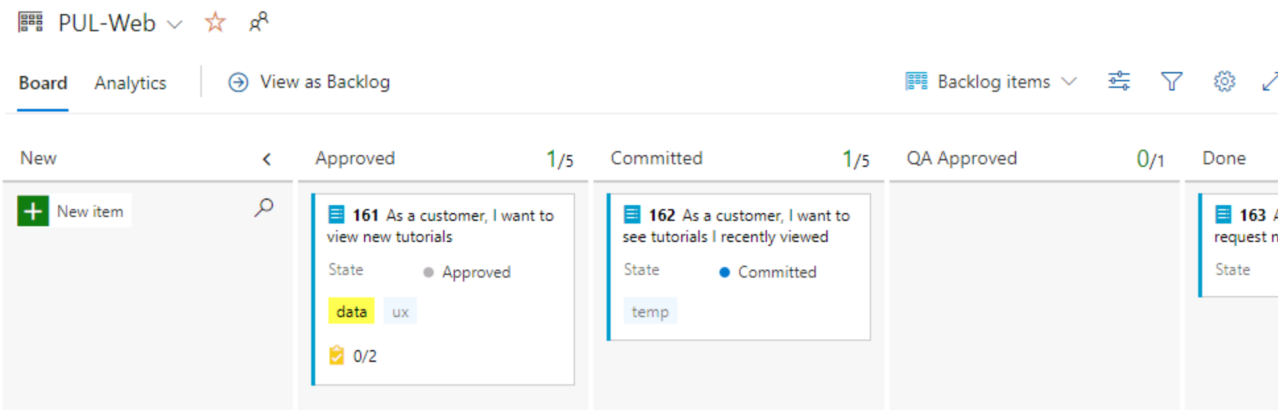
11. Select the **Columns** tab. This section allows you to add new stages to the workflow.

    - Click **+ Column** to add a new column to the Kanban board
    - Set the **Name** to **QA Approved**

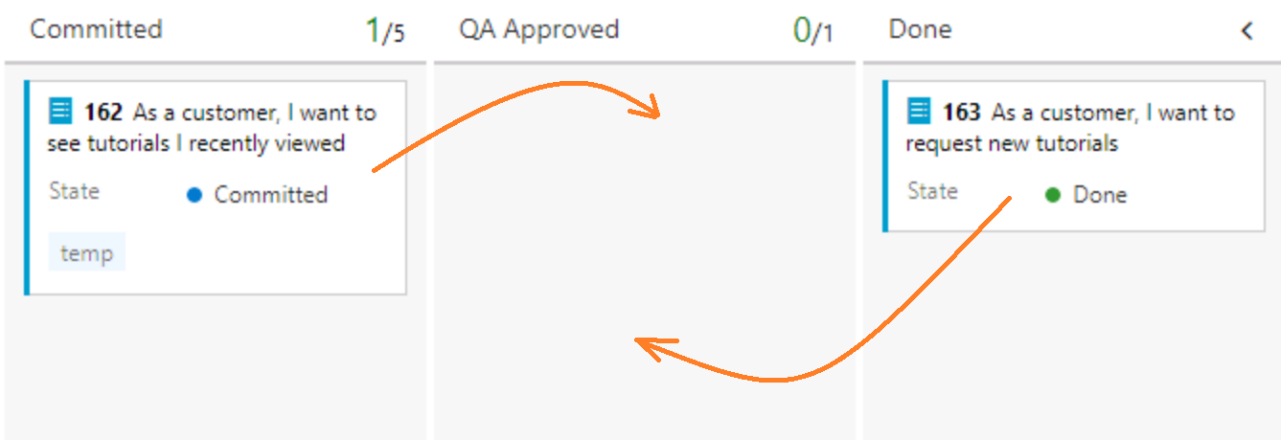
- Set the **WIP limit** to **1**, which indicates that only one work item should be in this stage at a time. (You would ordinarily set this higher, but there are only two work items to demonstrate the feature with here.)
- Move the stage to occur between Committed and Done.
- Finally click **Save and close**.



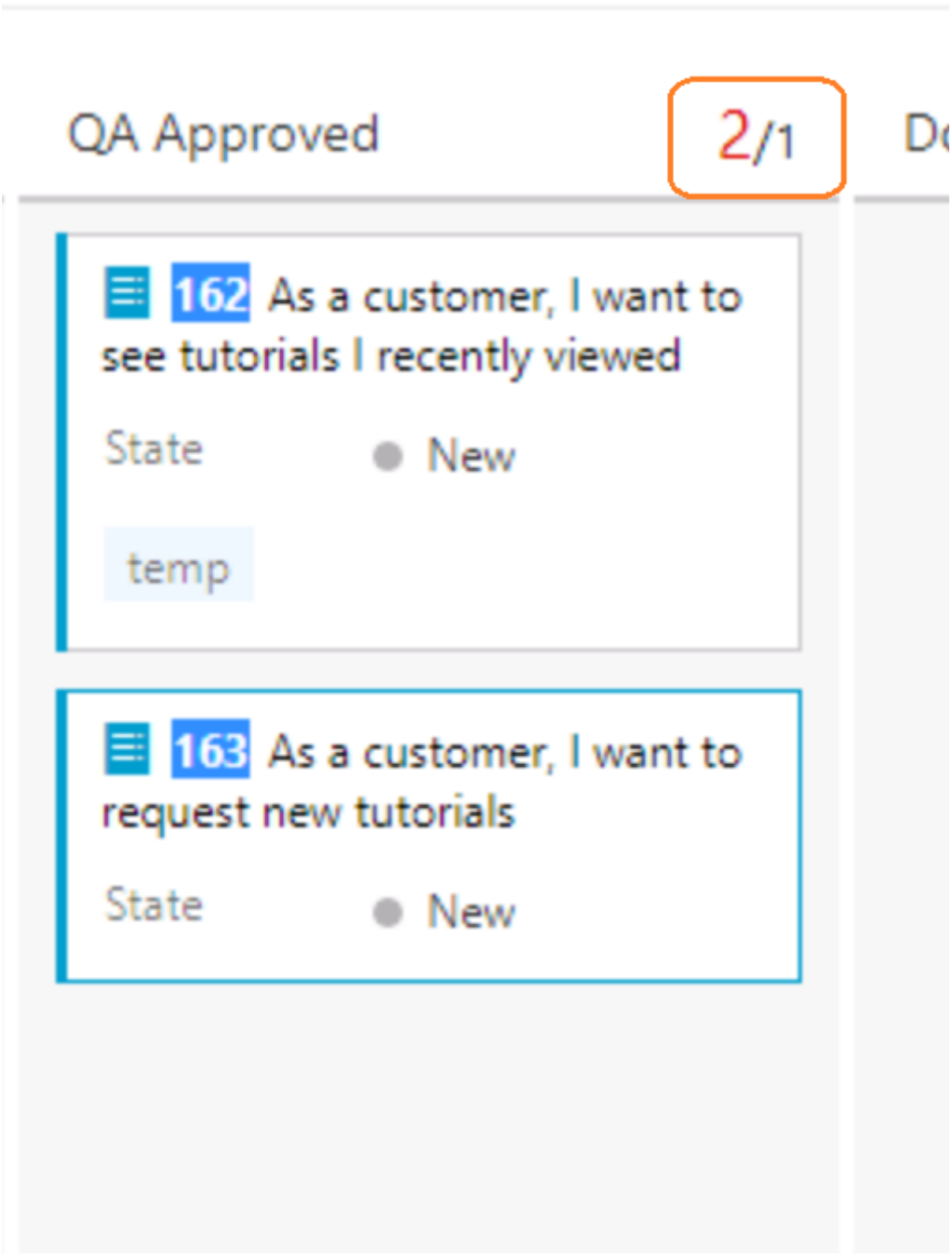
12. You will now see the new stage in the workflow.



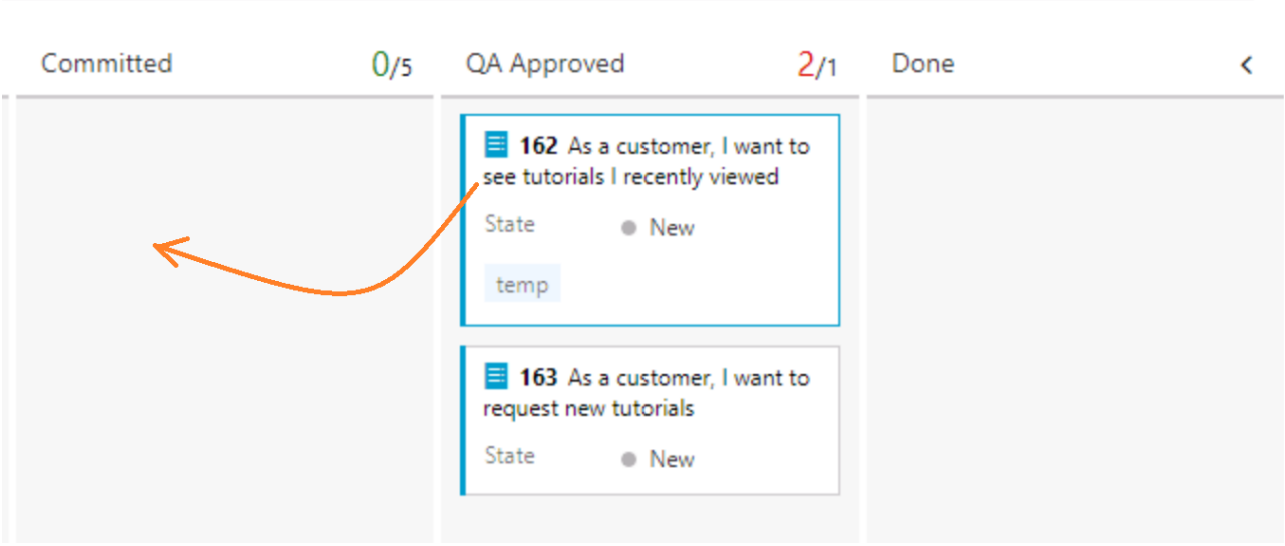
13. Move the work items from Committed and Done into QA Approved.



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



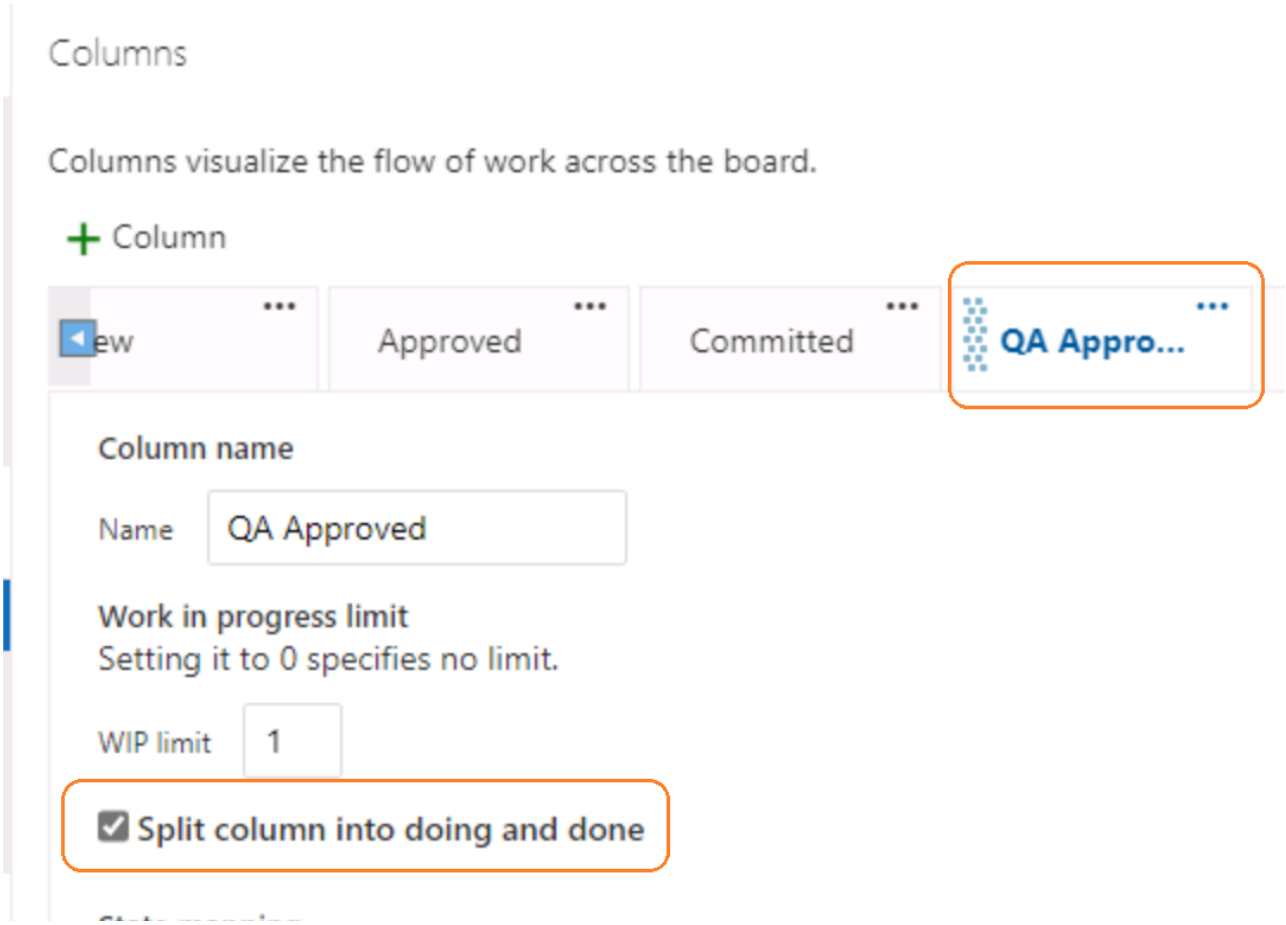
15. Move **As a customer, I want to see tutorials I recently viewed** backlog item back to **Committed**.



16. Click the **Configure team settings** button again.

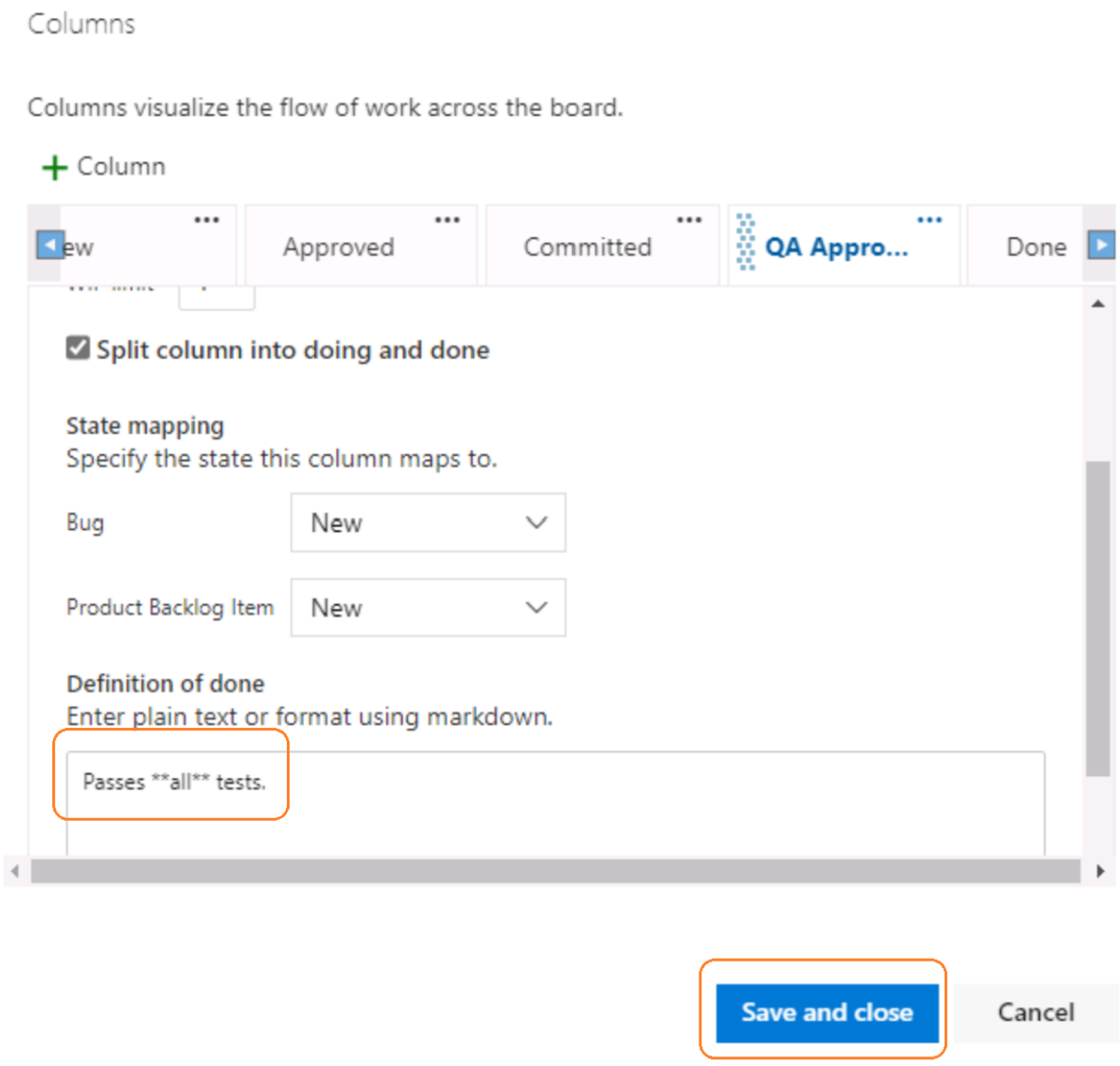
17. Return to the **Columns** tab and select **QA Approved**. Check **Split column into doing and done** to create two separate columns for this column.

> 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.

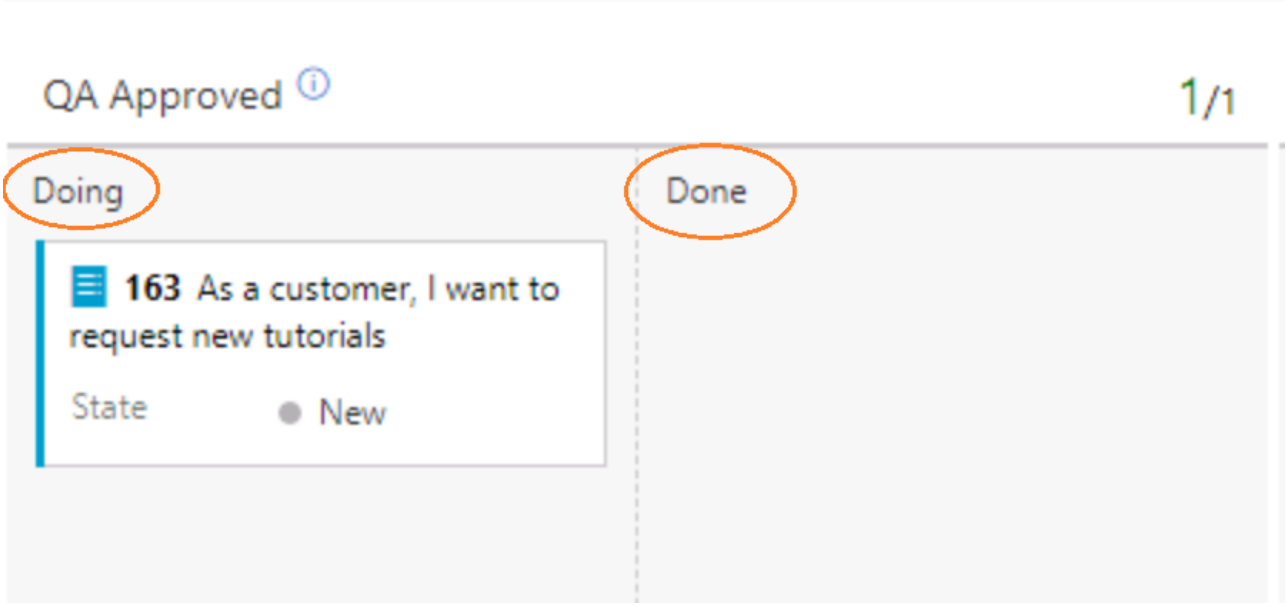


18. Scroll down in the **QA Approved** column settings and add a **Definition of done** using markdown, such as **Passes **all** tests.** Click **Save and close**.

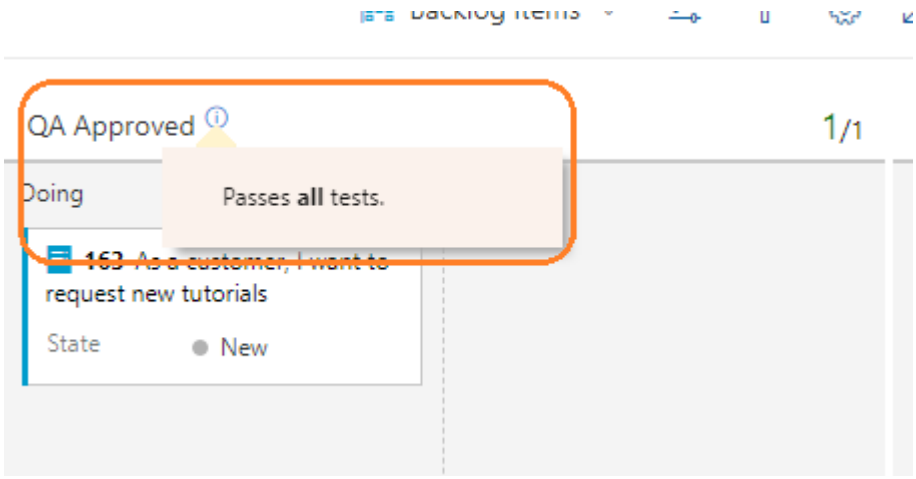
> As your team updates the status of work as it progresses from one stage to the next, it helps that they agree on what done means. By specifying the **Definition of done** criteria for each Kanban column, you help share the essential tasks to complete before moving an item into a downstream stage.



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



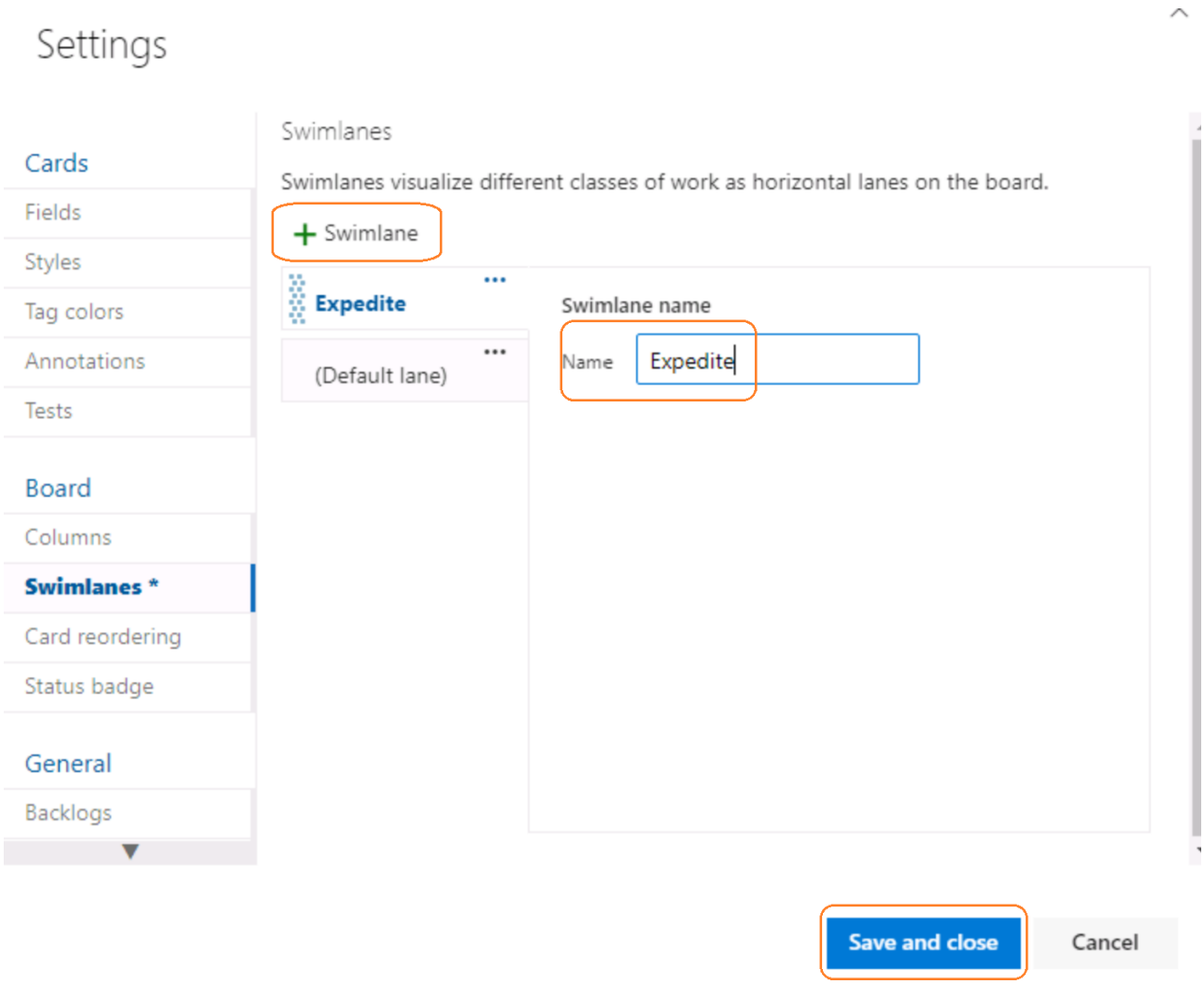
20. You can also click the icon next to the column header to read the Definition of done.



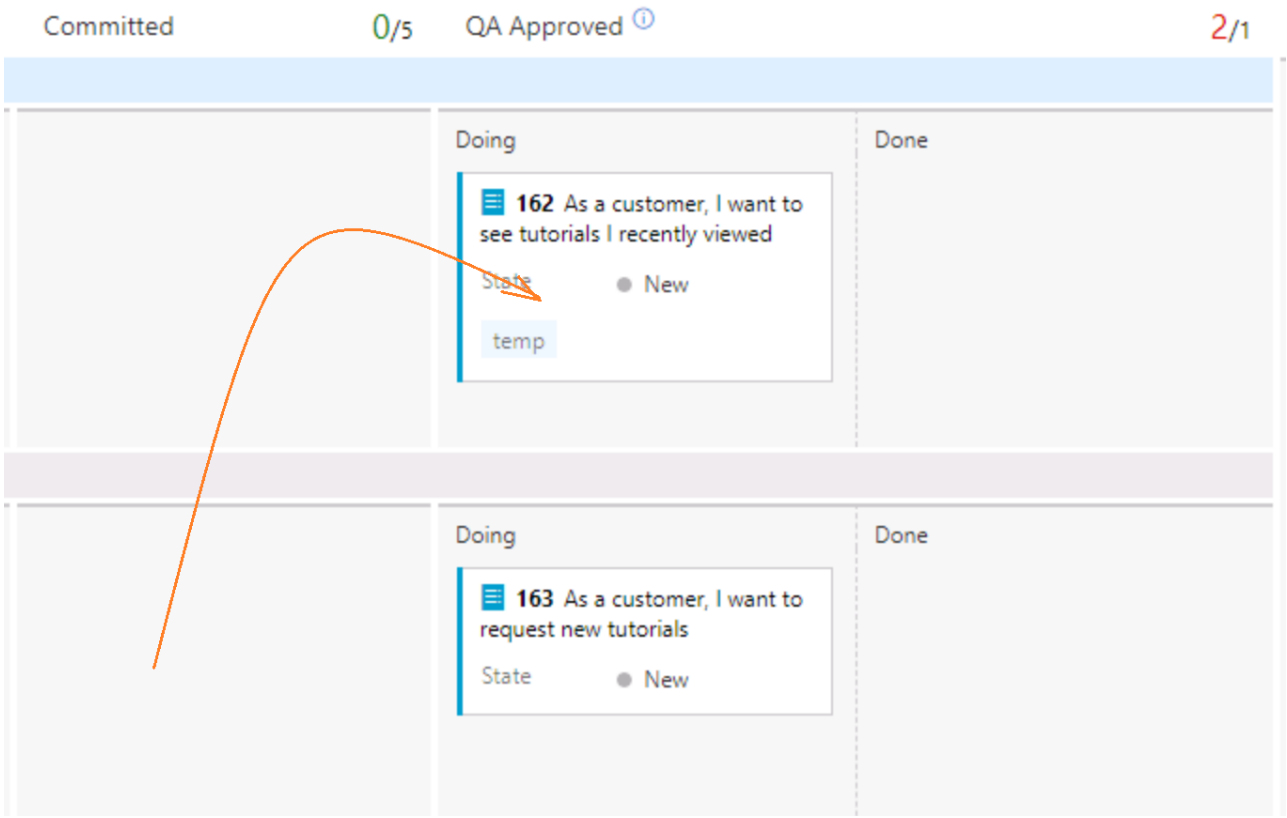
21. Click the **Configure team settings** button again.

22. From the **Swimlanes** tab, click **+ Swimlane** to add a swimlane and set the **Name** as **Expedite**. Click **Save and close**.

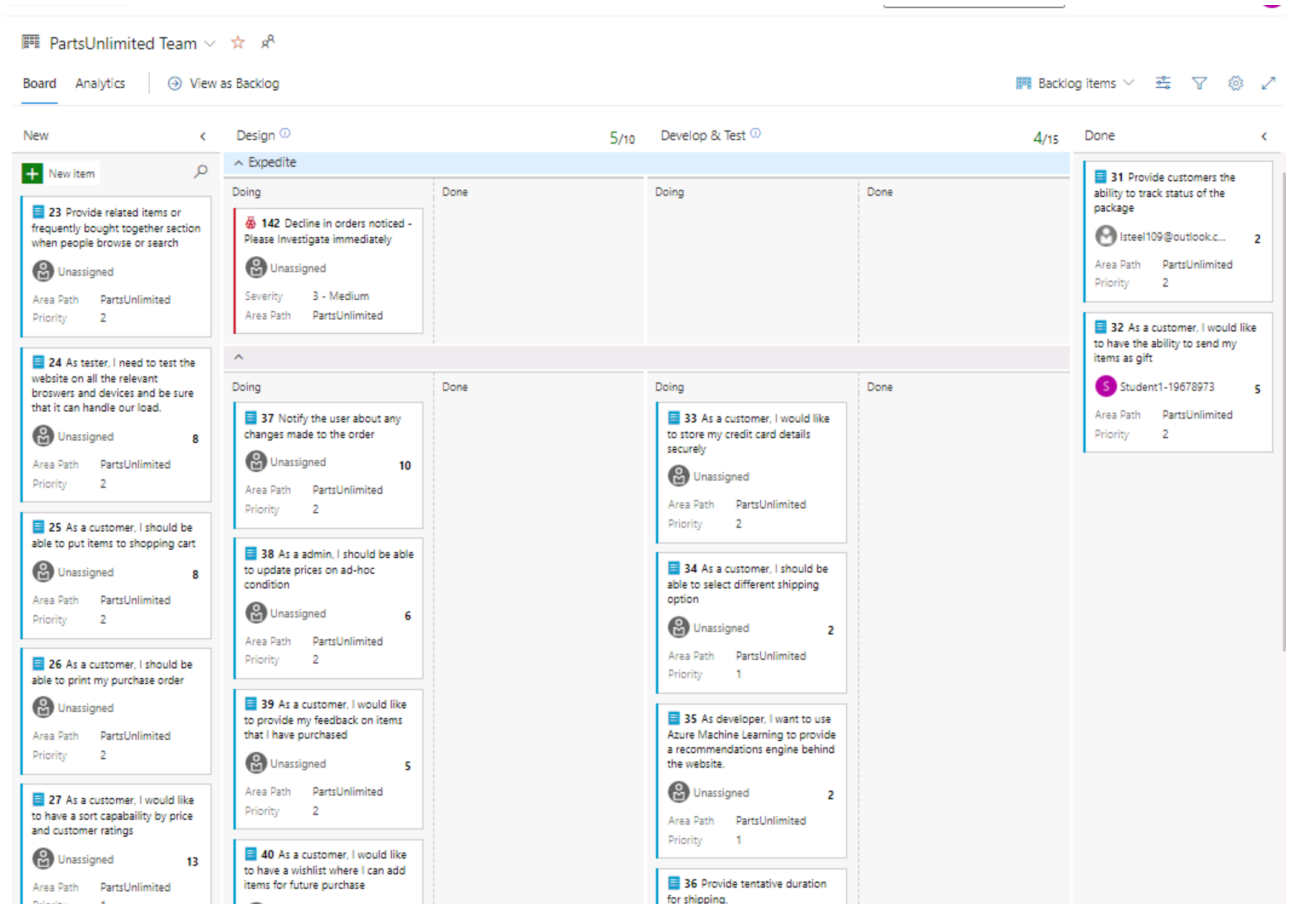
> Your Kanban board supports your ability to visualize the flow of work as it moves from new to done. When you add swimlanes, you can also visualize the status of work that supports different service-level classes. You can create a swimlane to represent any other dimension that supports your tracking needs.



23. Drag and drop the **Committed work item** into the **Expedite** swimlane under **QA Approved | Doing** column so that it gets recognized as having priority when QA bandwidth becomes available.



> To review a more sophisticated board with many more work items, select the **PartsUnlimited Team** from the team dropdown. This board provides a playground for you to experiment with and review the results. Take some time to analyze this Kanban board.



Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 2: Kanban Boards

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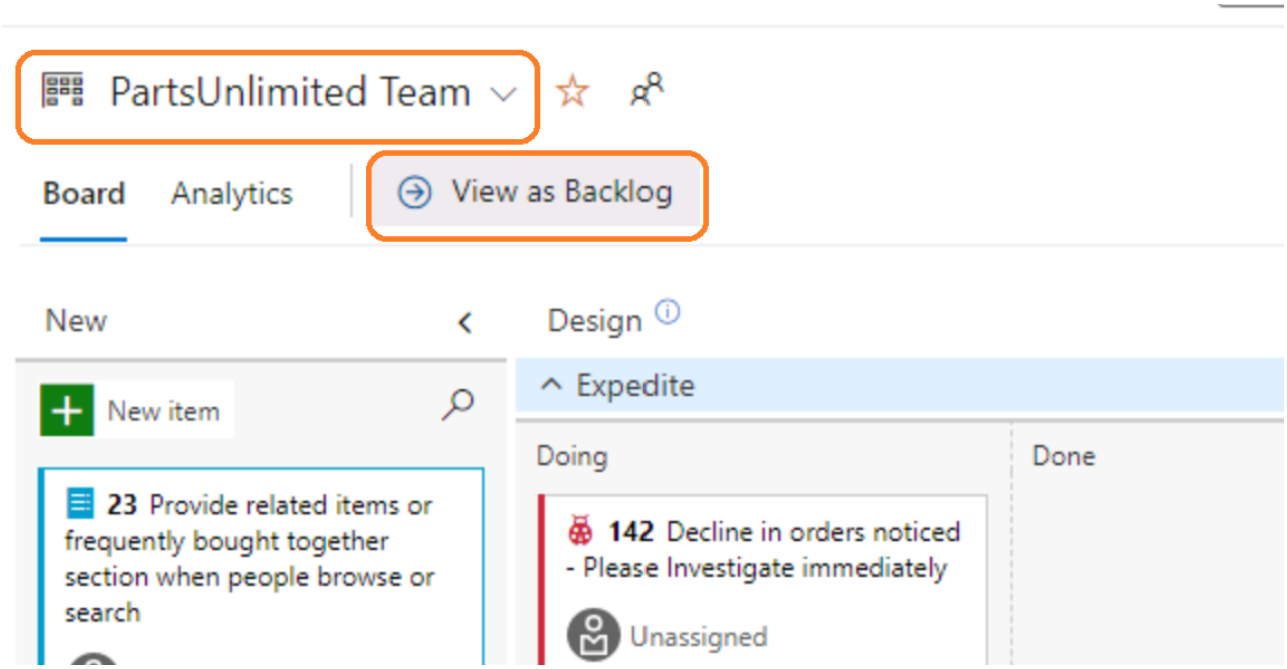
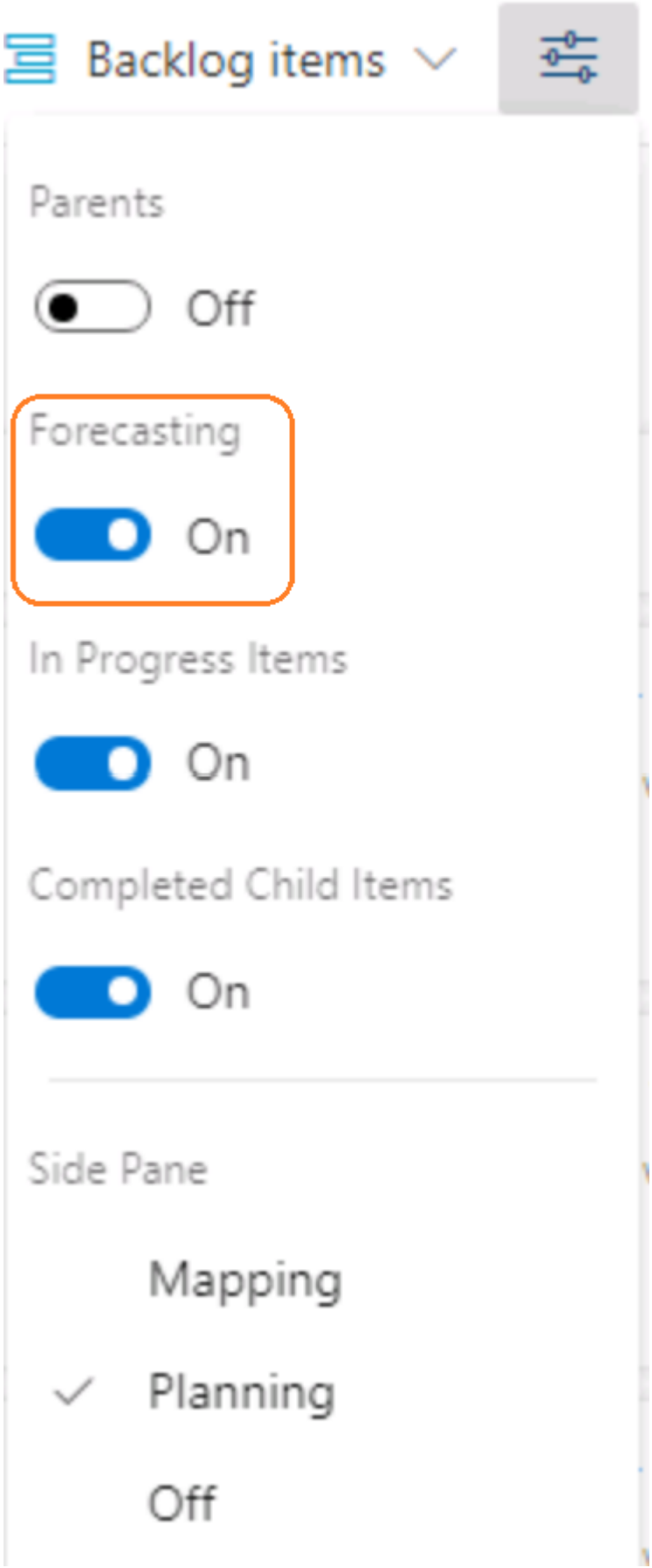
Task 2: Forecasting

1. Switch to **PartsUnlimited** team from the team dropdown and click **View as Backlog**.

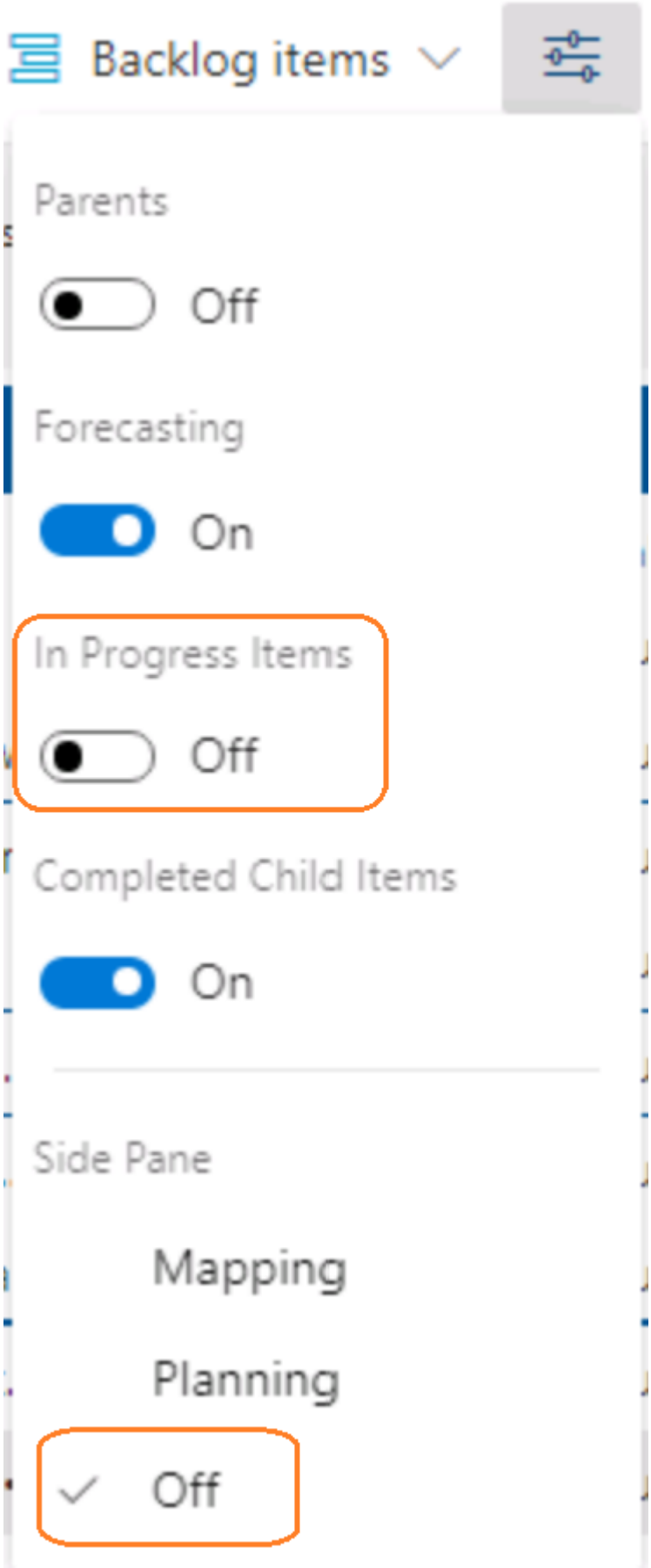


2. Choose the **view options** icon and slide **Forecasting** to **On**.

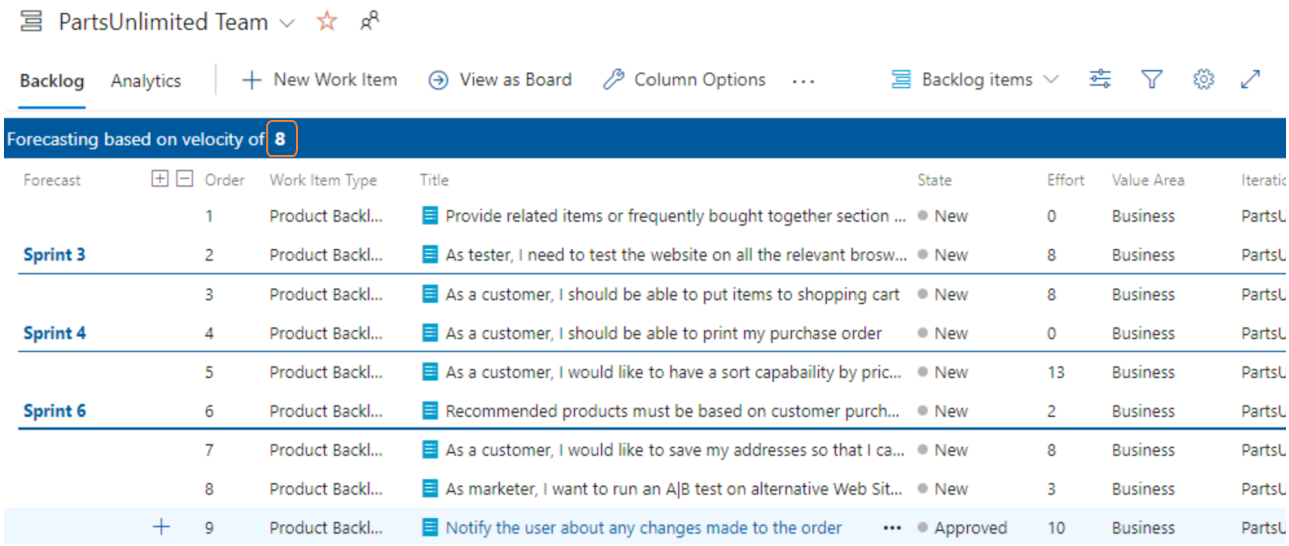


3. To keep things simple, turn the **Mapping** and **Planning** panes **Off**. Set **In Progress Items** to **Off** to hide those items that won't be counted in the forecast.

> The forecast tool ignores Scrum items set to Committed or Done and Agile and CMMI items set to Active, Resolved, or Completed.

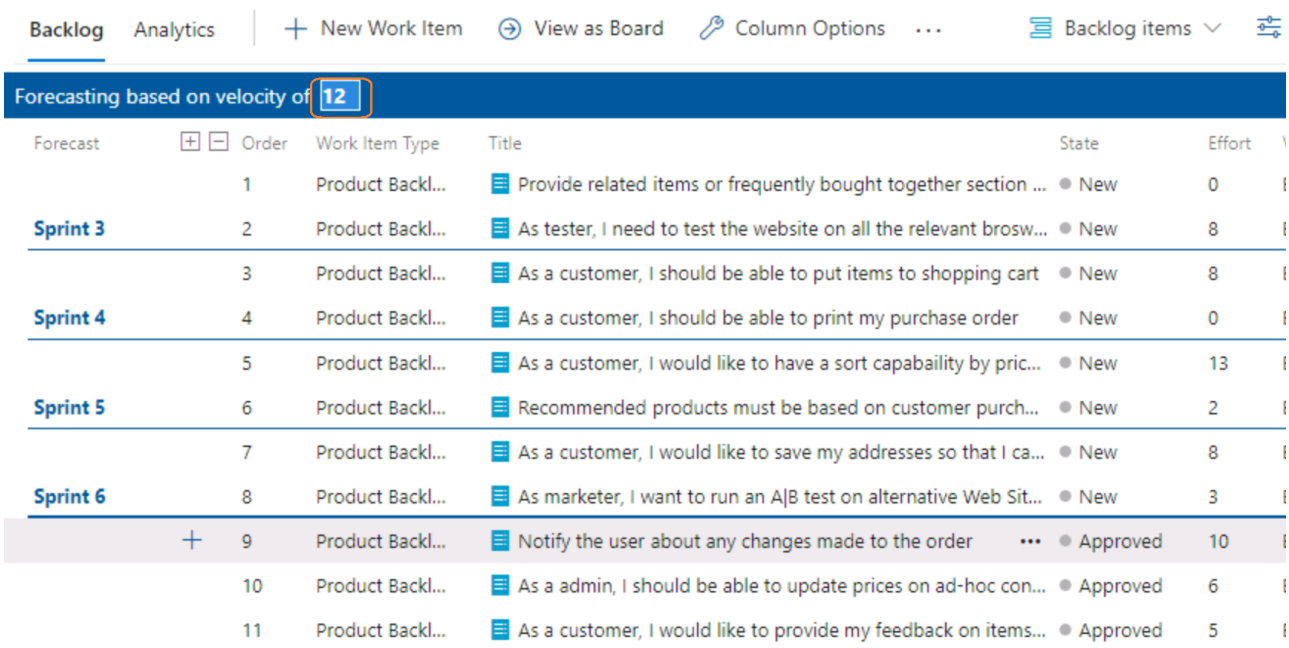


4. Enter **8** as your team's predicted velocity.



> The tool draws lines for each future sprint selected by the team. The Forecast lines show how much work your team should be able to complete in future sprints.

5. Update the velocity to **12** and visualize the changes in the forecasting.



Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 3: Defining Dashboards

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Exercise 3: Defining Dashboards

Objectives

In this exercise, you will:

- Create a new dashboard
- Add widgets to a dashboard
- Add work item charts to dashboard

Prerequisites

- Exercise 1

Scenario

Customizable, highly-configurable dashboards provide you and your teams with the flexibility to share information, monitor progress and trends, and improve your workflow processes.

Tasks

- Task 1: Add Widgets
- Task 2: Create Work Item charts

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 3: Defining Dashboards

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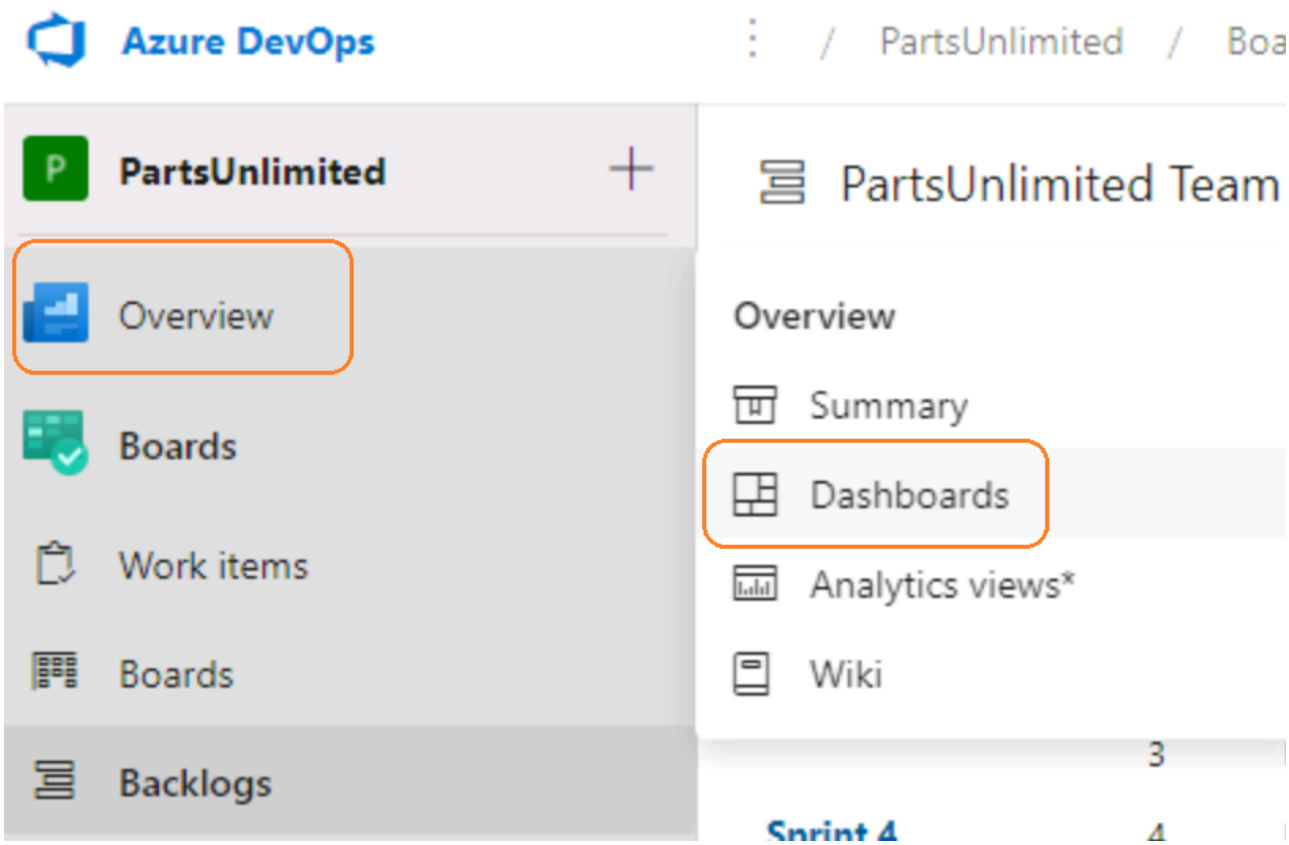
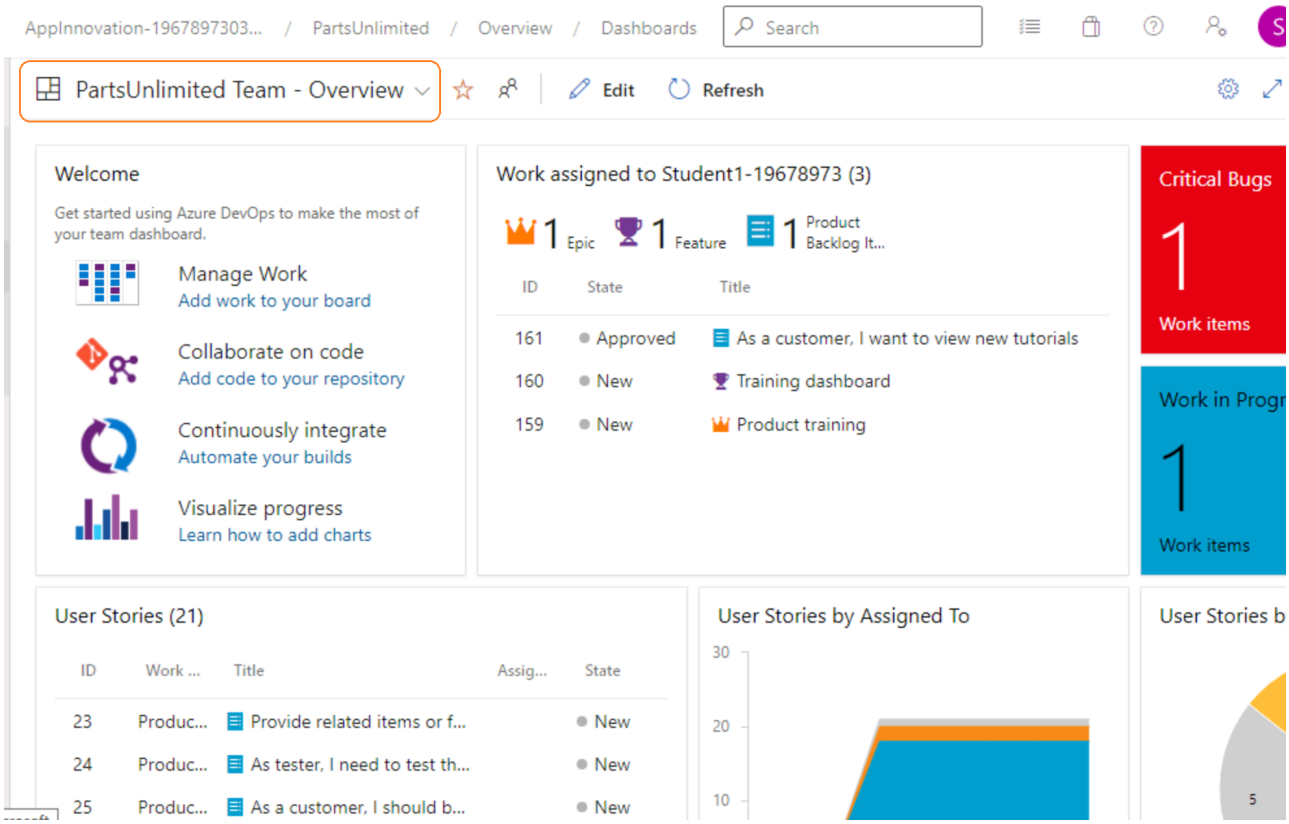
Task 1: Add widgets

1. In the browser that has **PartsUnlimited** project open in Azure DevOps Services, select **Overview | Dashboards**.

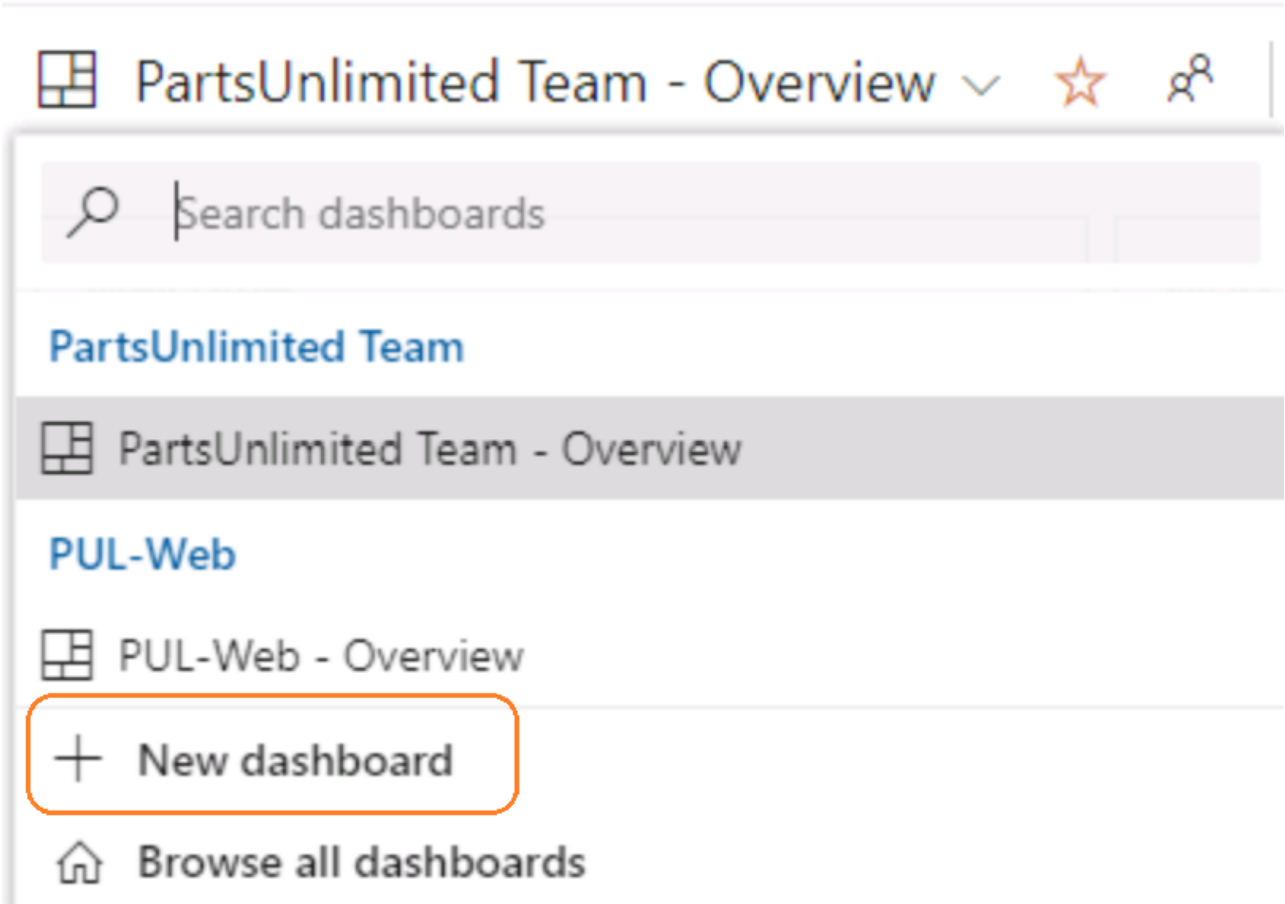


2. In the Dashboards page, select **PartsUnlimited Team - Overview**.

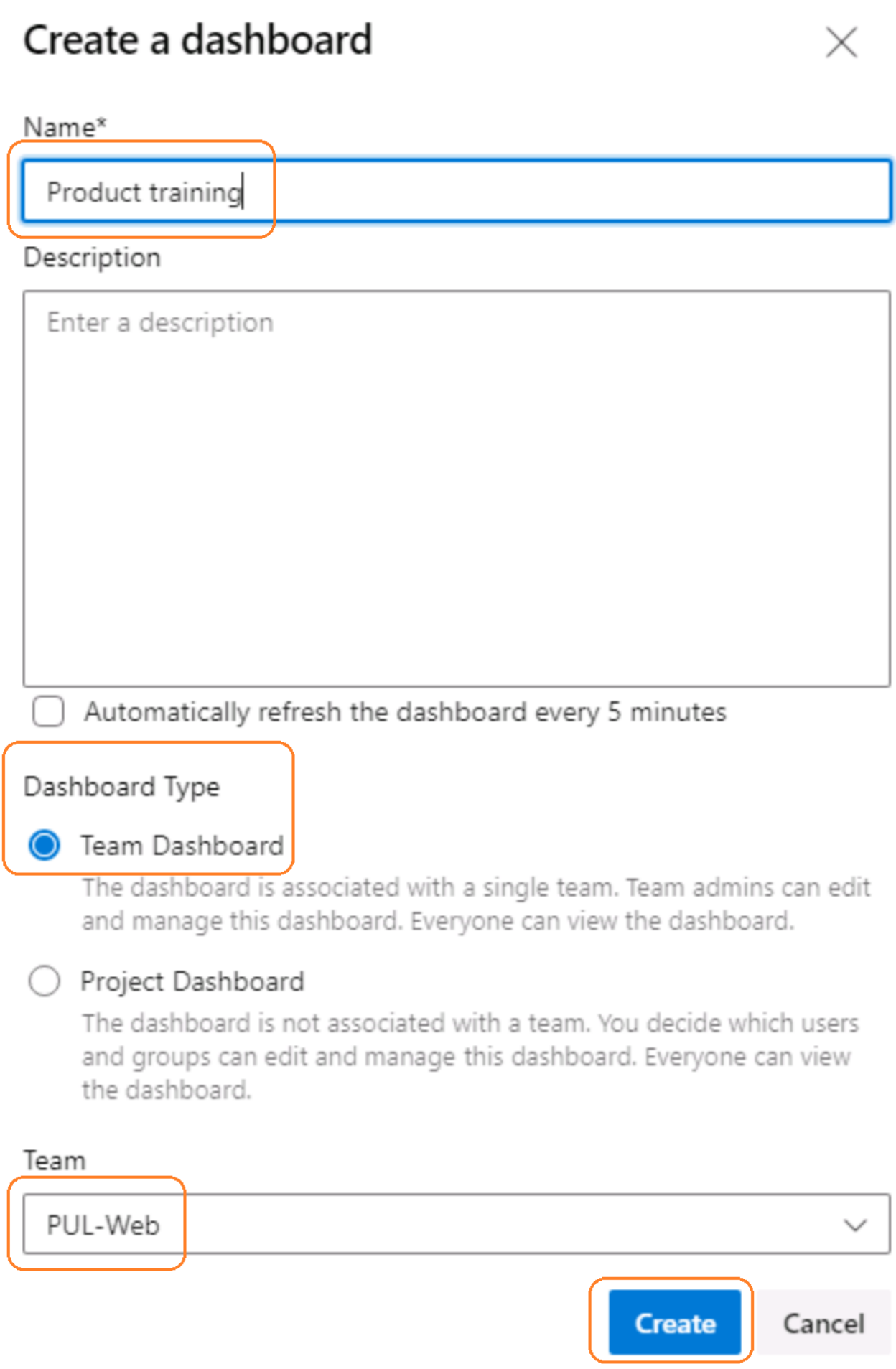
> Dashboards allow teams to visualize status and monitor progress across the project. At a glance, you can make informed decisions without having to drill down into other parts of your team project site. The Overview page provides access to a default team dashboard which you can customize by adding,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



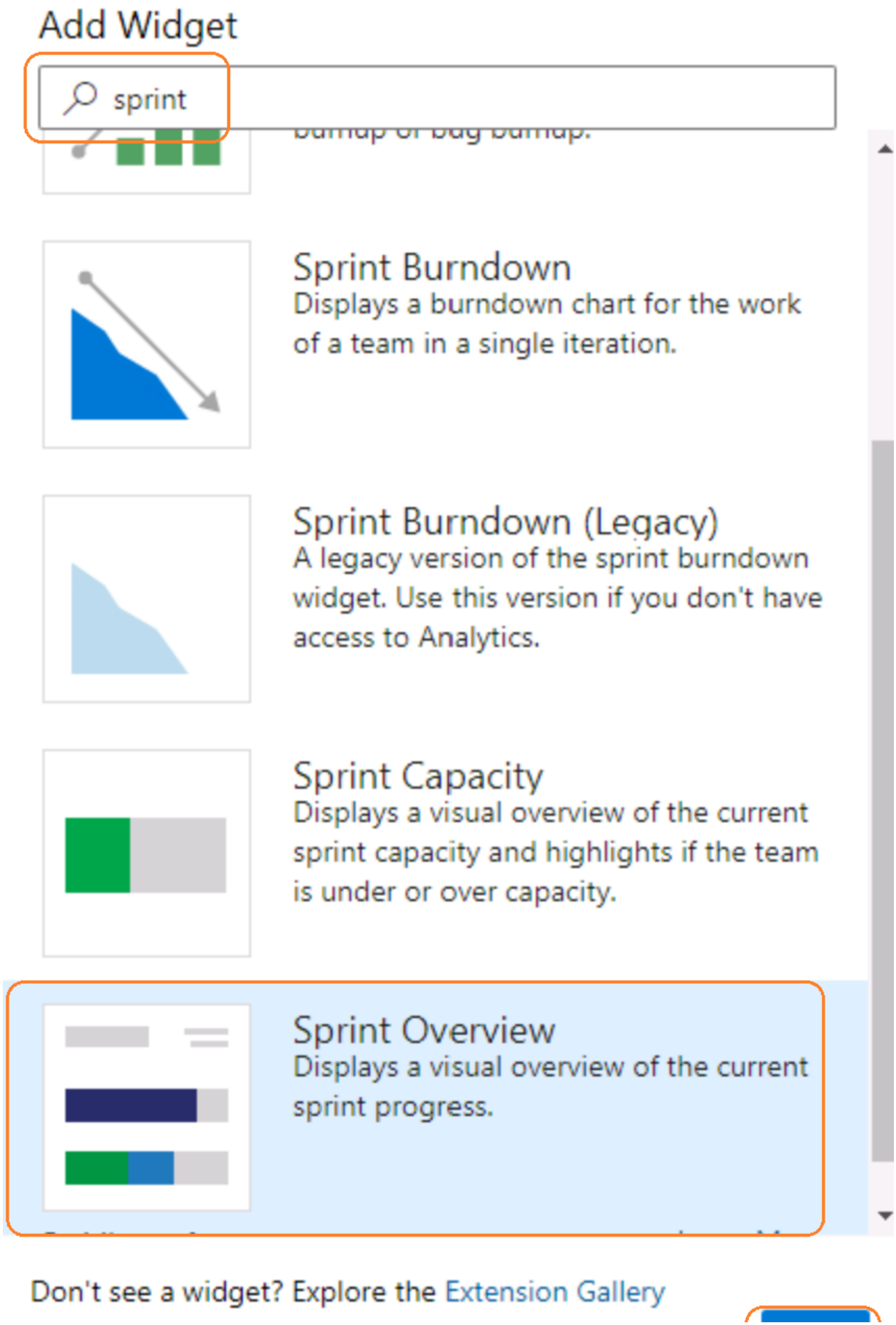
3. From the dashboard dropdown, select **+ New dashboard**.



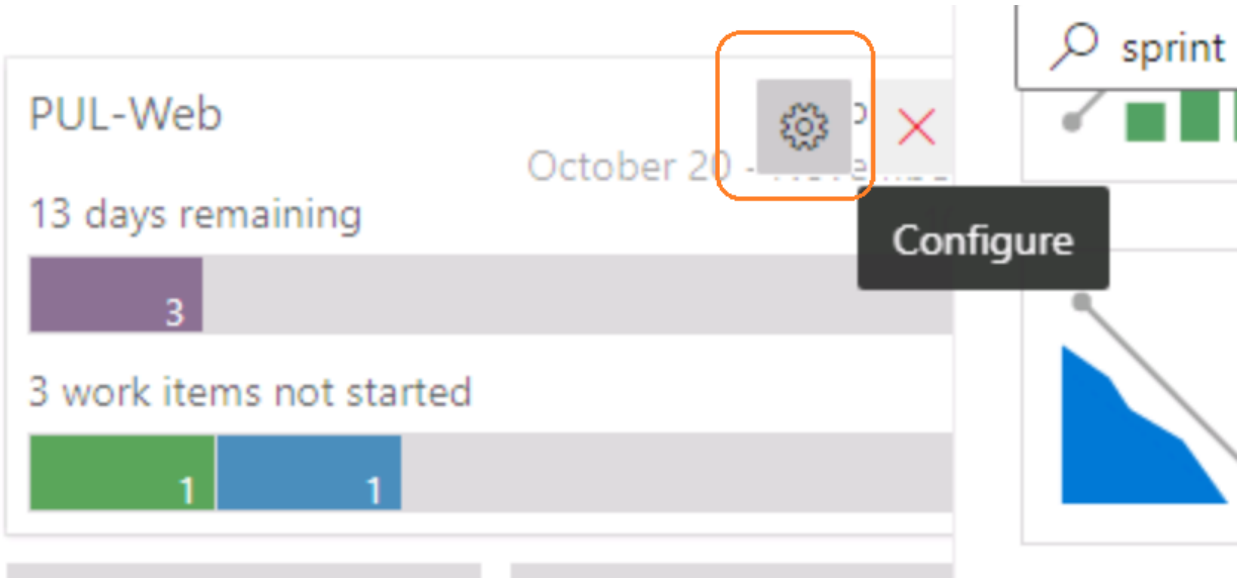
4. Set the **Name** to **Product training**, select the **Dashboard Type** as **Team Dashboard** and select the **Team** as **PUL-Web** team. Click **Create**.


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 edit and manage this dashboard. Everyone can view the dashboard.
Project Dashboard
The dashboard is not associated with a team. You decide which users and groups can edit and manage this dashboard. Everyone can view the dashboard.
Team
PUL-Web
Create
Cancel

5. Click on **Add a widget**. In the **Add Widget** panel, search for **sprint** to find existing widgets that focus on sprints. Select **Sprint Overview** and click **Add**.

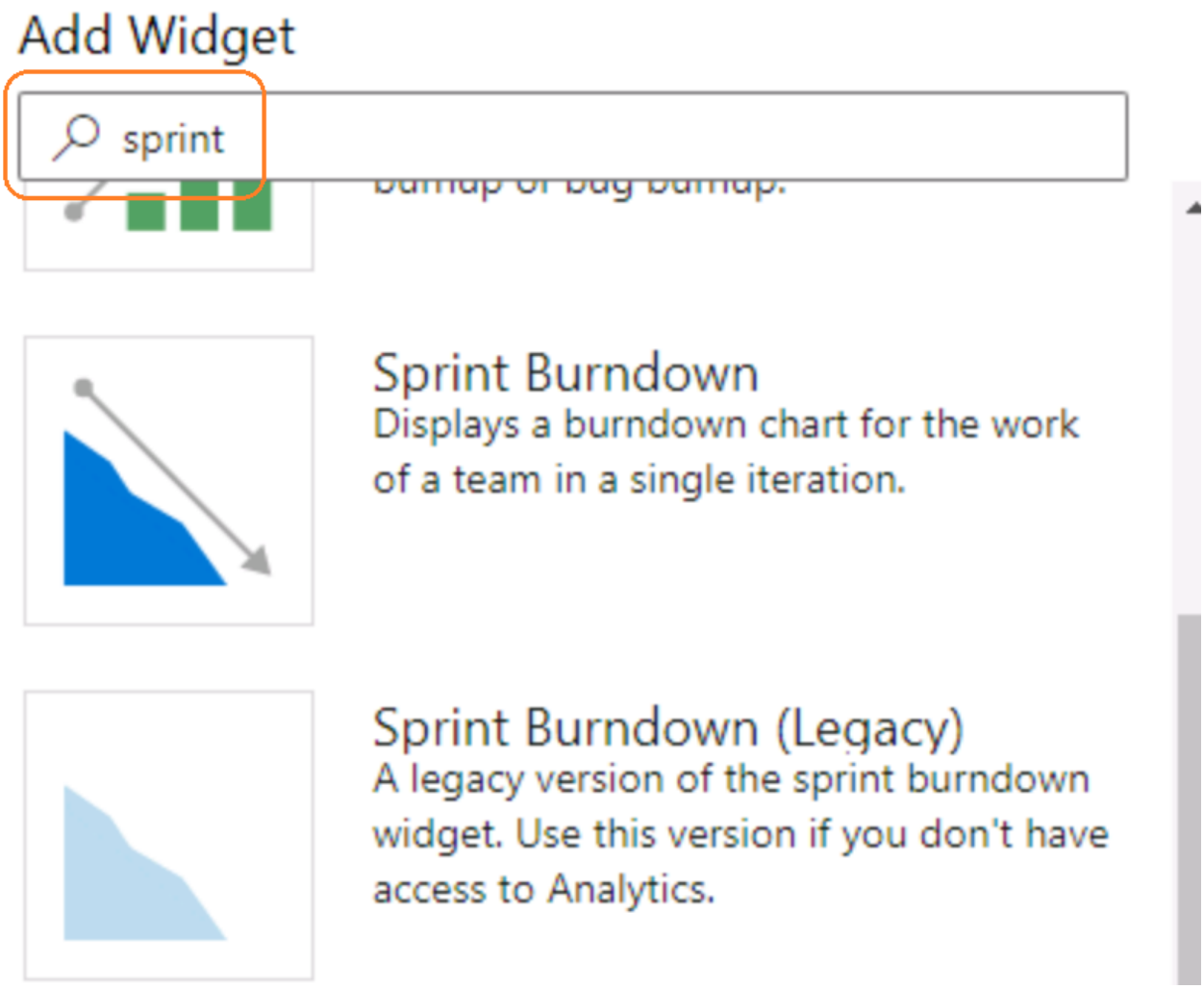


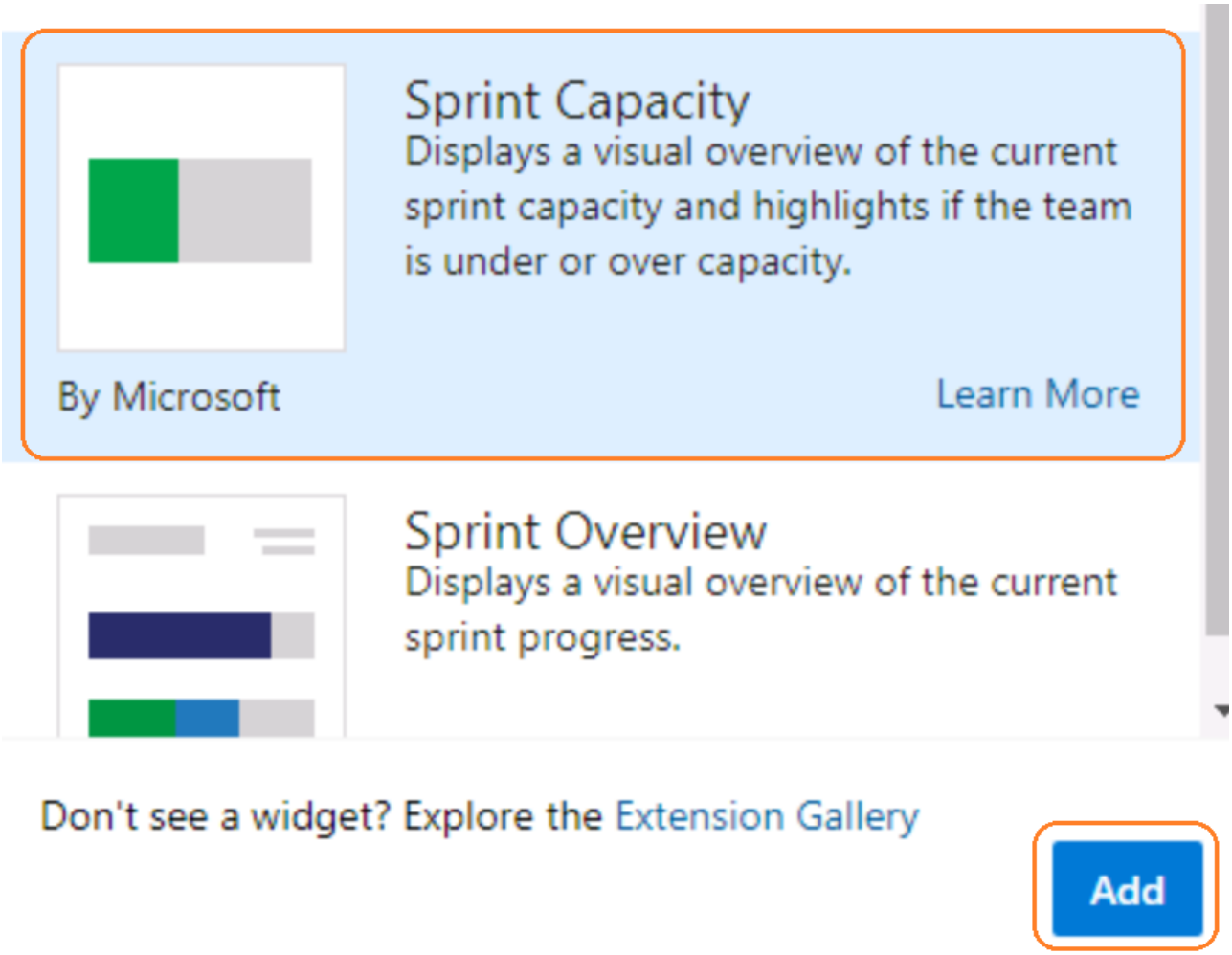
6. Many widgets have options you can configure. Click the **Configure** button.



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

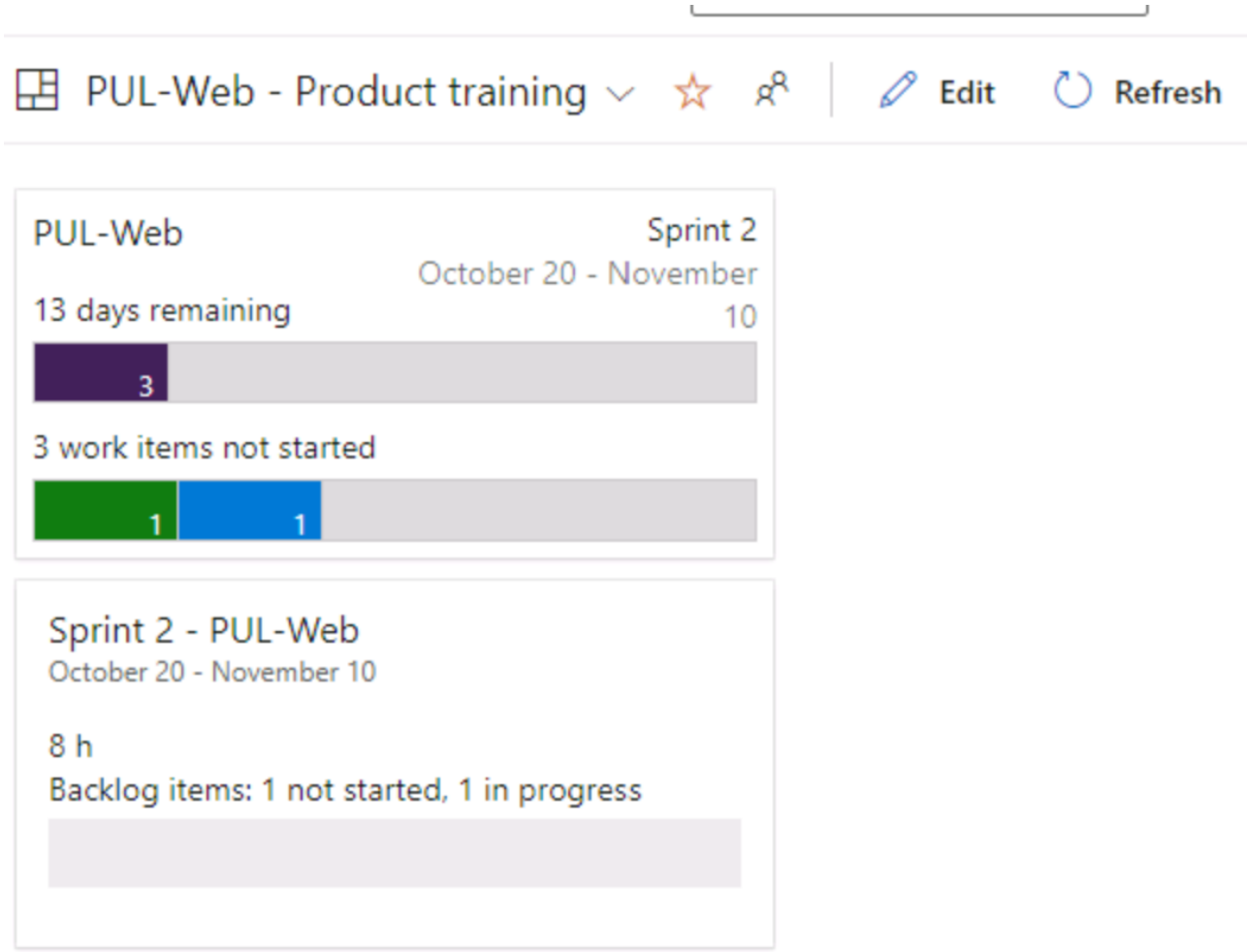
8. Search the widgets again for **sprint** and add the **Sprint Capacity** widget.





9. Click **Done Editing**.

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


PUL-Web - Product training
Edit
Refresh
PUL-Web
Sprint 2
October 20 - November 10
13 days remaining
3
3 work items not started
1
1
Sprint 2 - PUL-Web
October 20 - November 10
8 h
Backlog items: 1 not started, 1 in progress

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 3: Defining Dashboards

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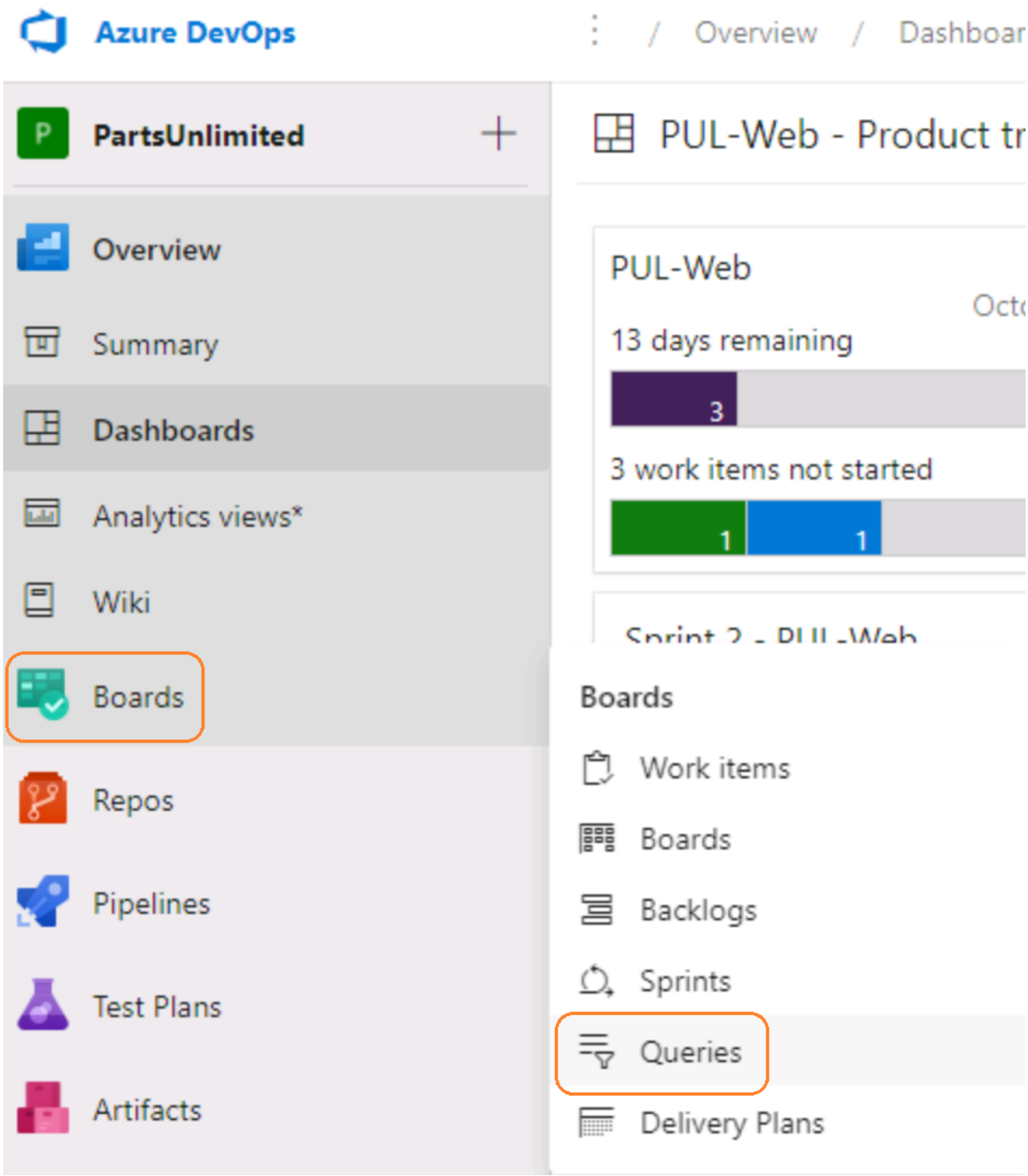
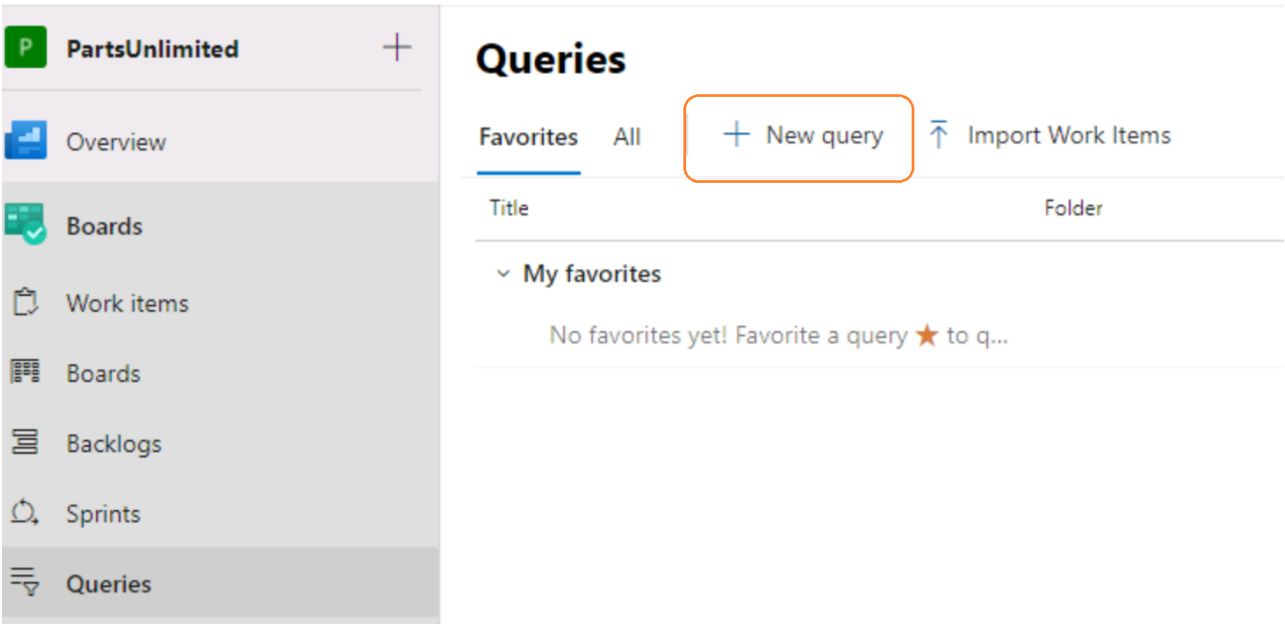
Task 2: Create work item charts

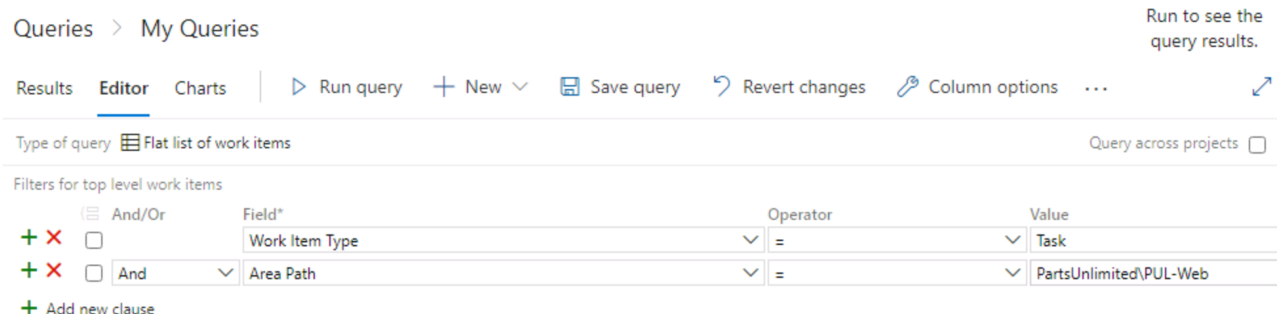
1. Another way of customizing dashboards is to generate charts based on work item queries, which you can share to a dashboard. Select **Boards | Queries**.



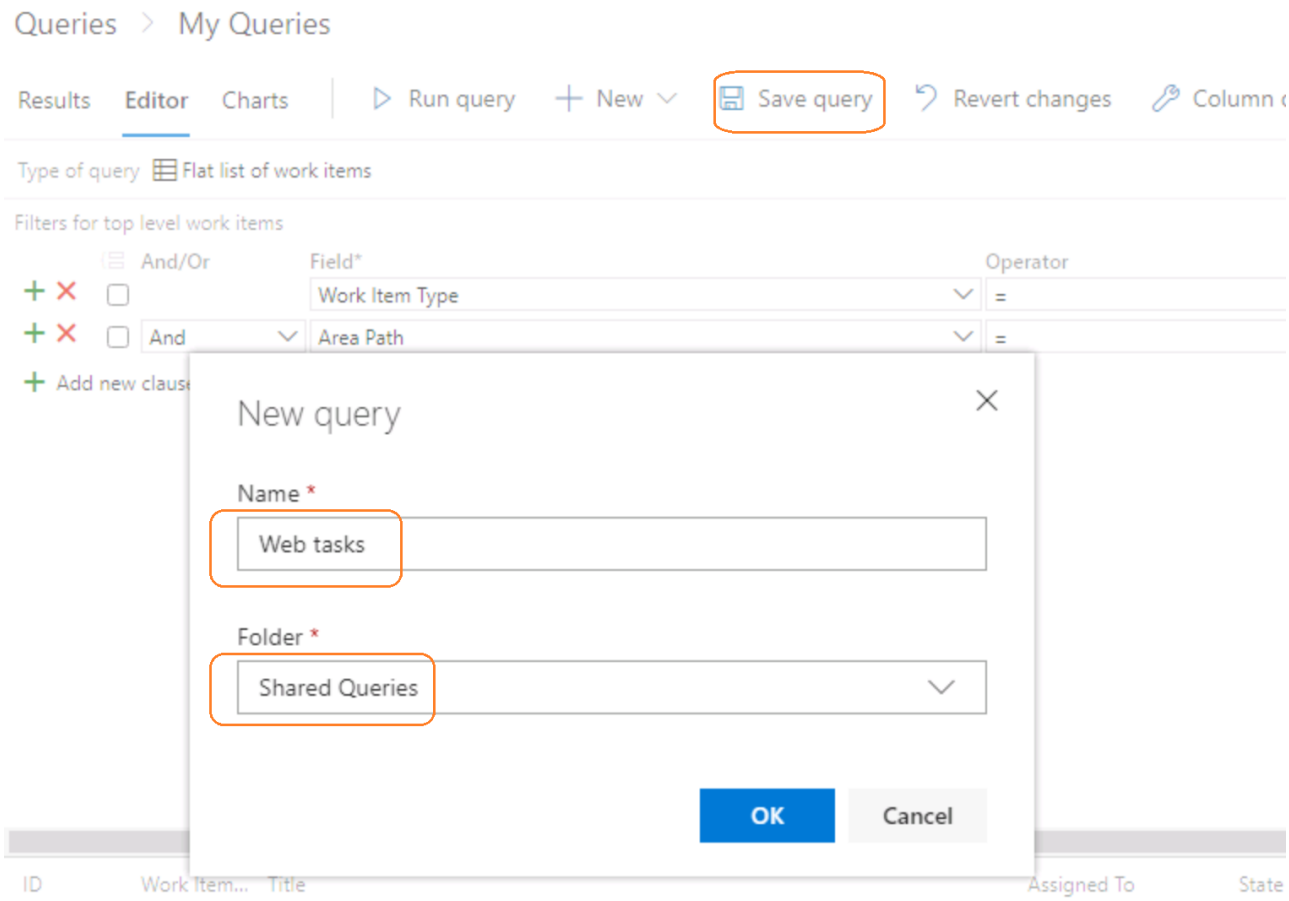
2. Click **+ New query**.



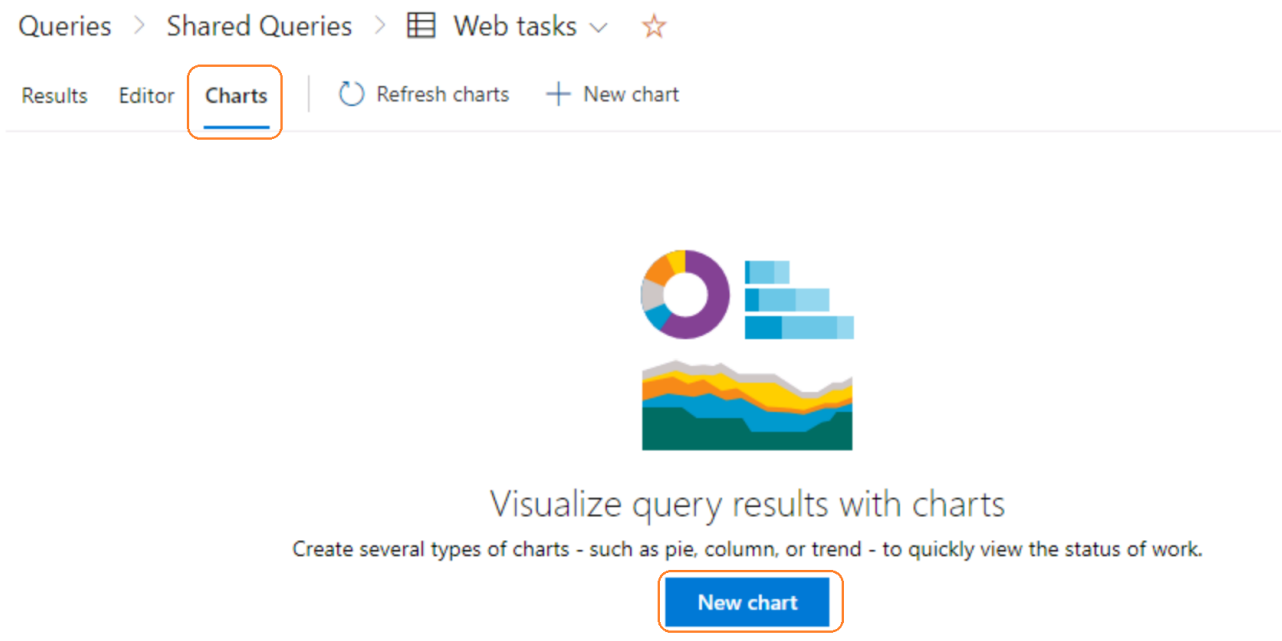
3. Set the first clause as **Work Item Type = Task** and the second clause to **Area Path = PartsUnlimited\PUL-Web**.



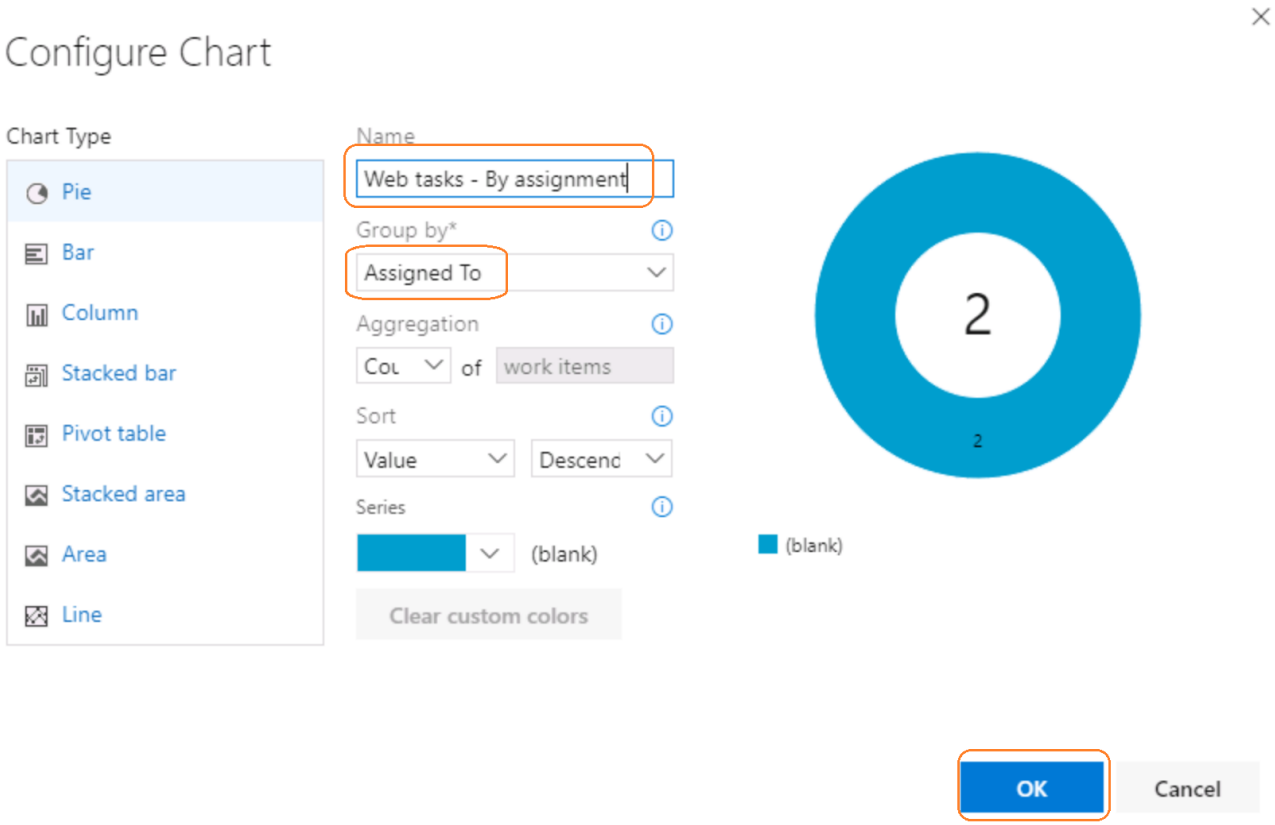
4. Click **Save query** and set the **Name** field to **Web tasks** and the **Folder** to **Shared Queries**. Click **OK**.



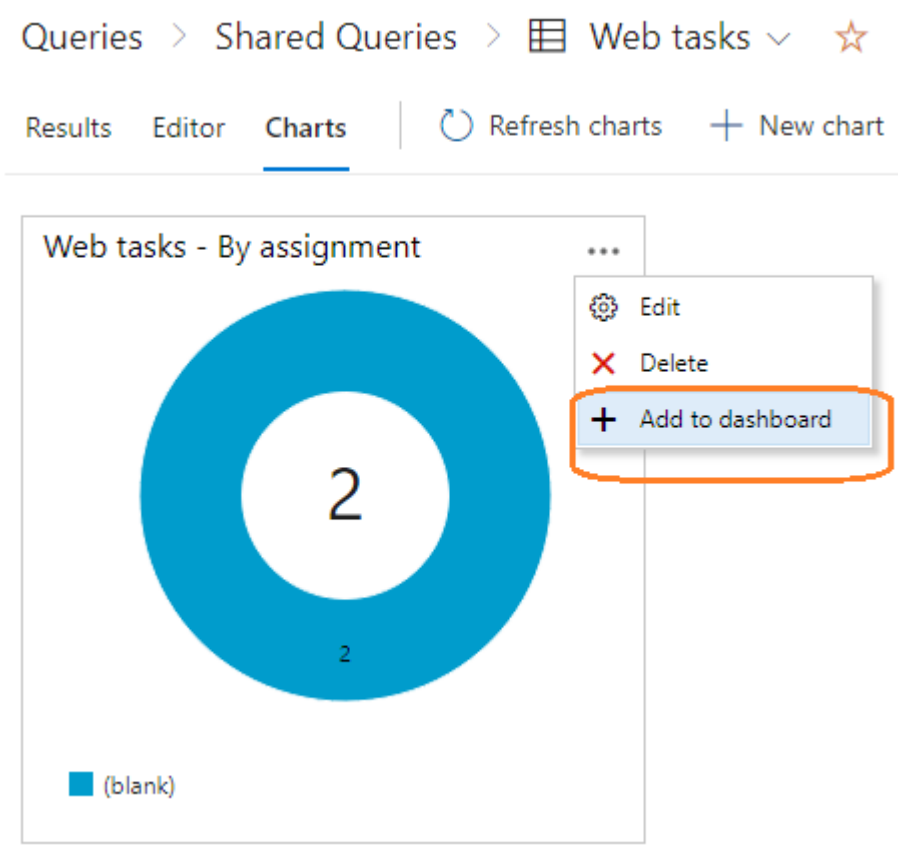
5. Select the **Charts** tab and click **New chart**.

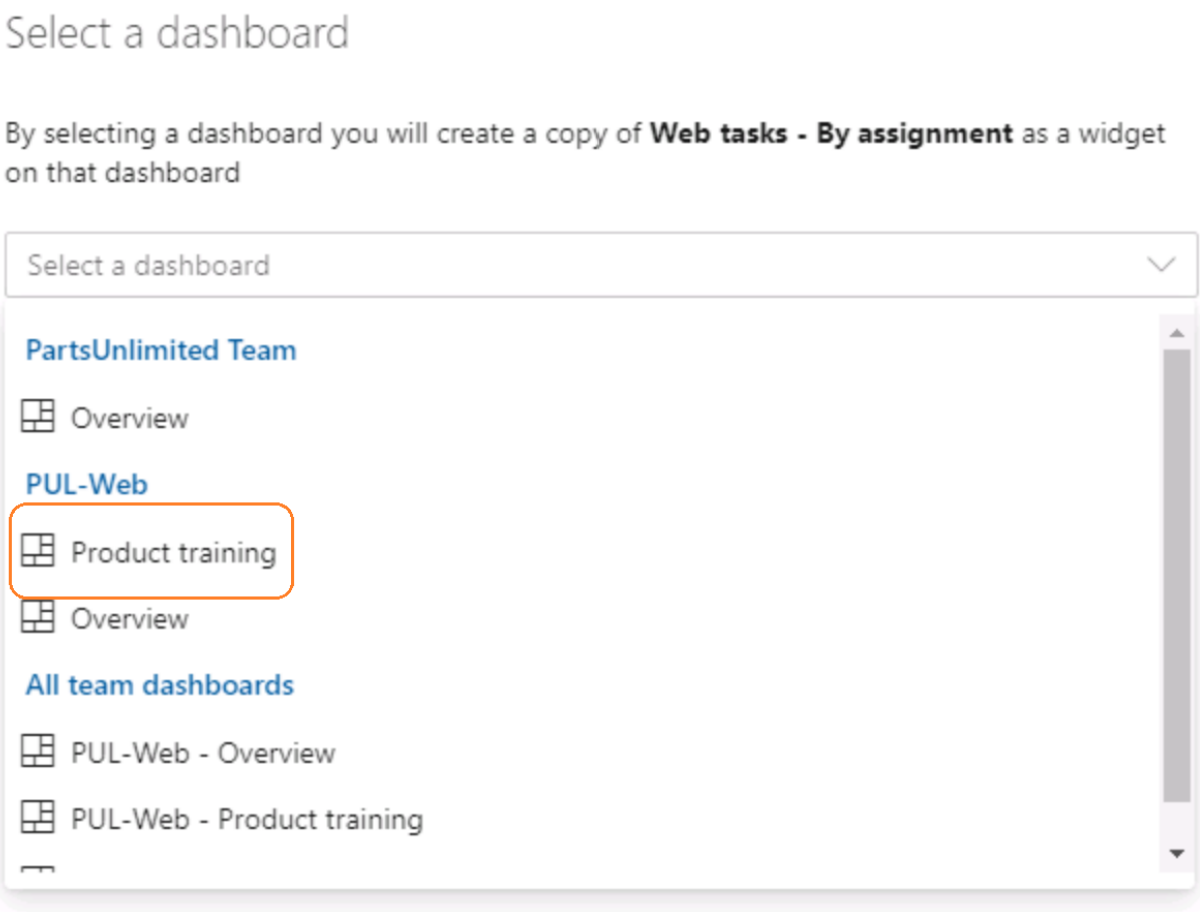


6. Set the **Name** of the chart to **Web tasks - By assignment** and **Group by** to **Assigned To**. Click **OK** to save.

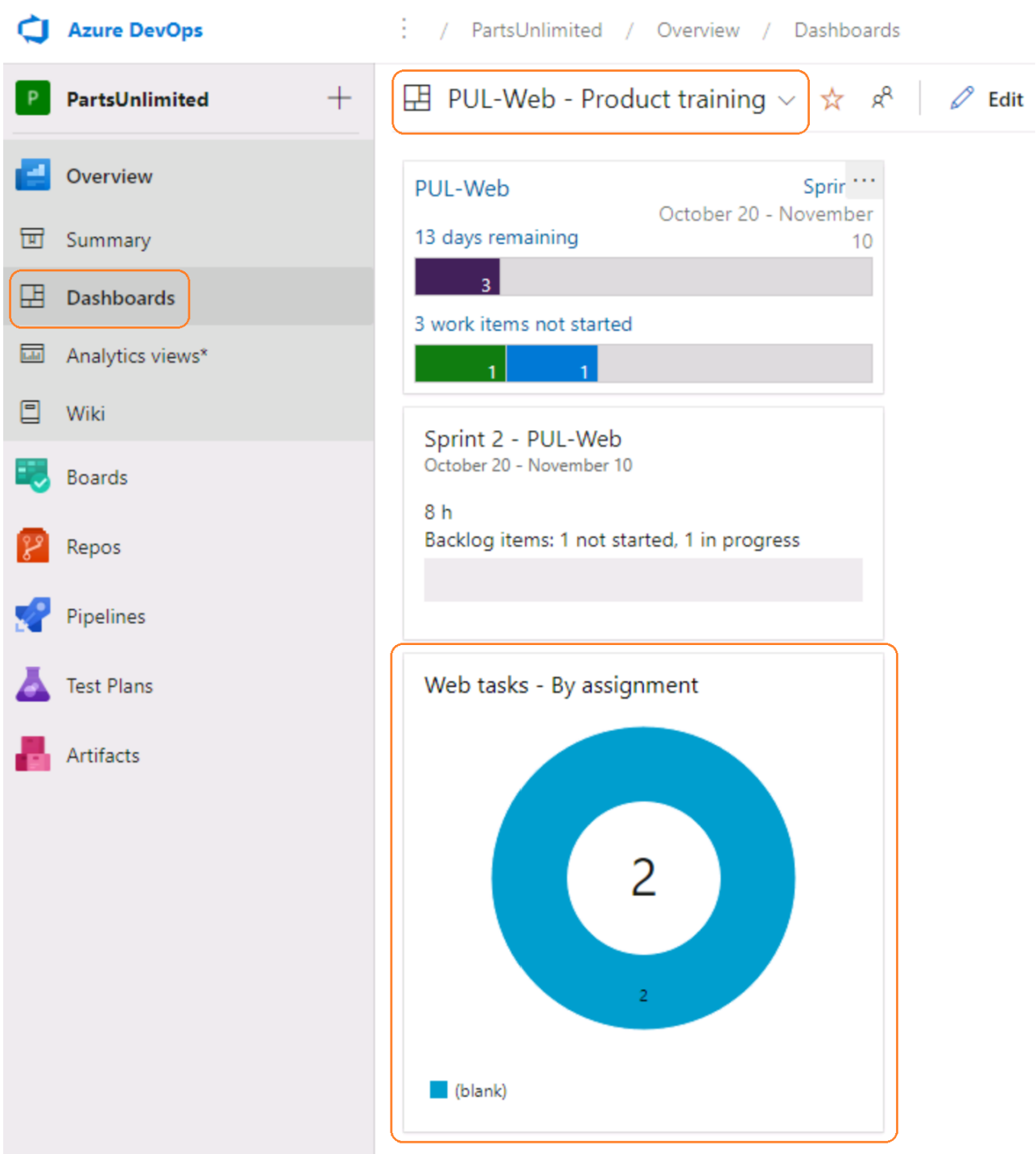


7. You can now add this chart to the **Product training** dashboard.





8. Switch to the **PUL-Web - Product training** dashboard to see the newly added chart.


Azure DevOps
PartsUnlimited / Overview / Dashboards
PartsUnlimited
Overview
Summary
Dashboards
Analytics views*
Wiki
Boards
Repos
Pipelines
Test Plans
Artifacts
PUL-Web - Product training
Edit
PUL-Web
Sprir
October 20 - November
13 days remaining
10
3
3 work items not started
1
1
Sprint 2 - PUL-Web
October 20 - November 10
8 h
Backlog items: 1 not started, 1 in progress
Web tasks - By assignment
2
2
(blank)

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 4: Managing Delivery Plans

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Exercise 4: Managing Delivery Plans

Objectives

In this exercise, you will:

- Create a Delivery Plan and make a delivery decision based on data from the plan.

Prerequisites

None

Scenario

It takes several teams to develop large software projects. Very large projects require multiple autonomous teams that can manage their own backlog and priority while contributing to a unified direction for that project. Regular reviews of the project schedule with these teams help ensure that the teams are working toward common goals. Delivery Plans provide the needed multi-team view of your project schedule.

Tasks

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 4: Managing Delivery Plans

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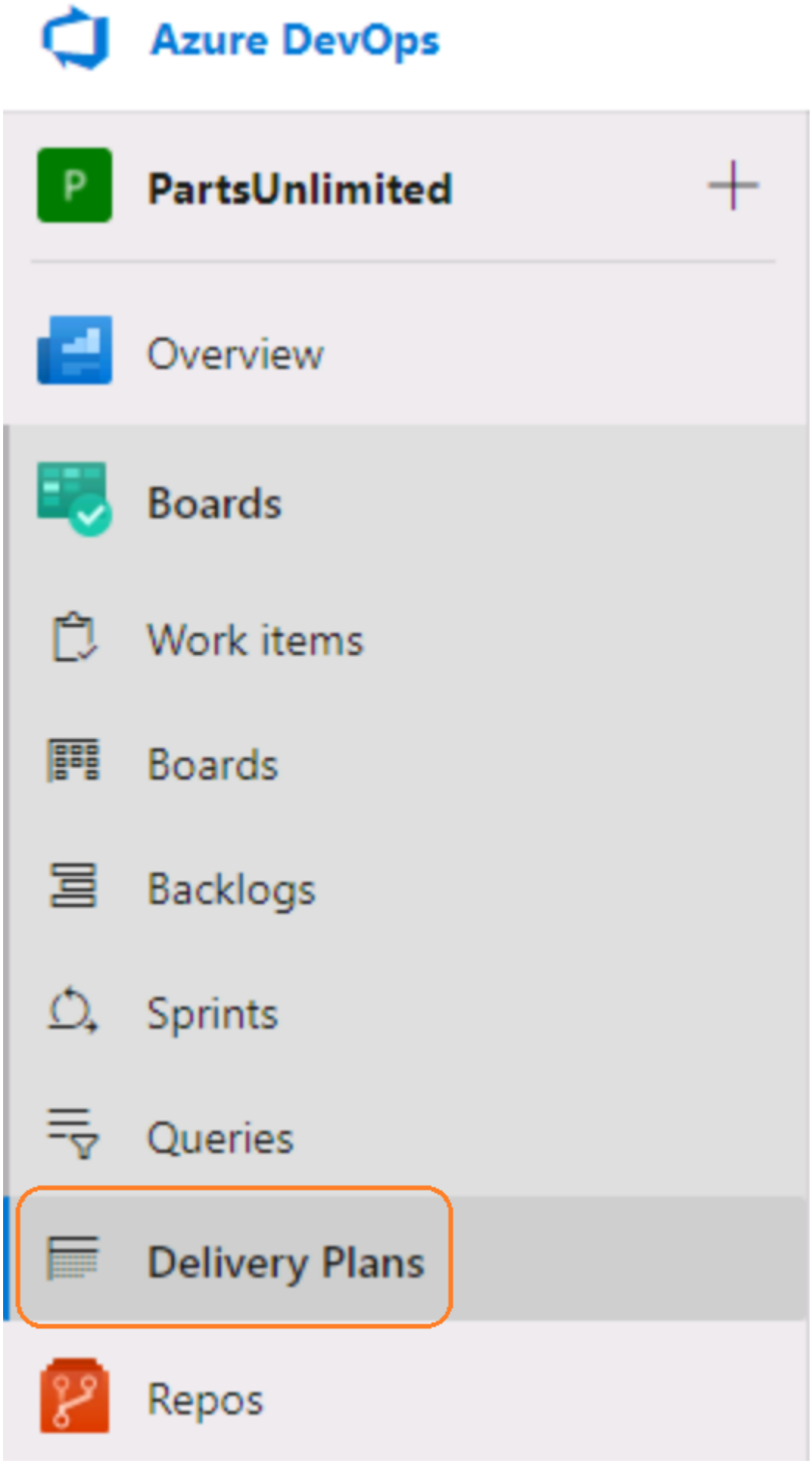
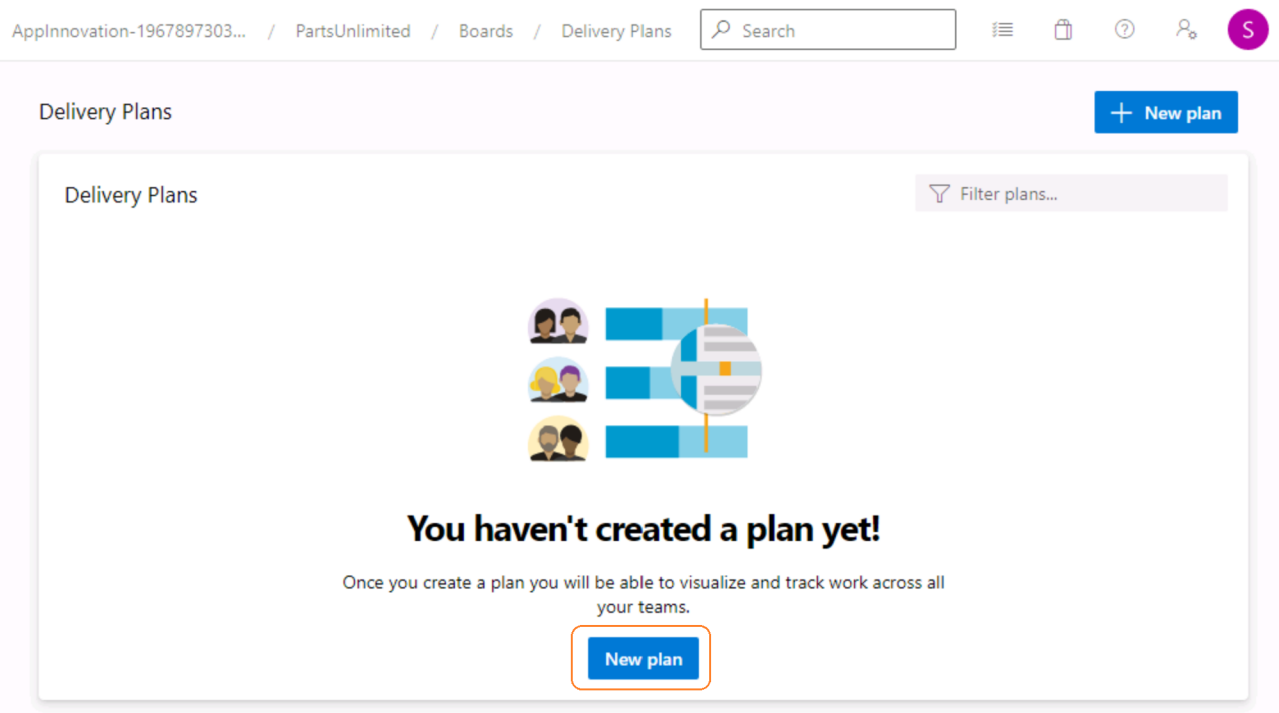
Task 1: Creating a delivery plan

1. For the **PartsUnlimited** project in Azure DevOps Services, select **Boards | Delivery Plans**.



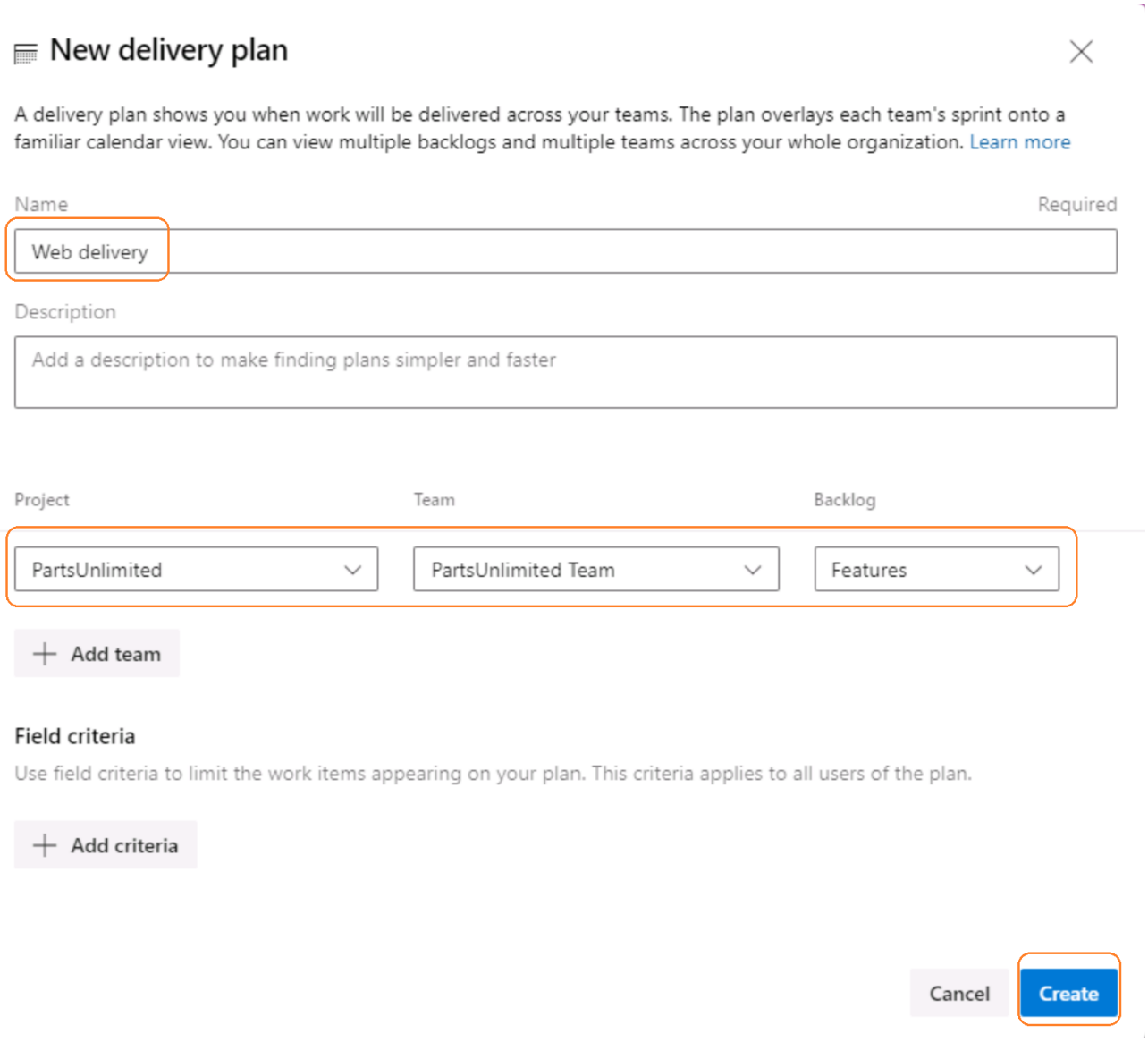
2. Click **New plan**.



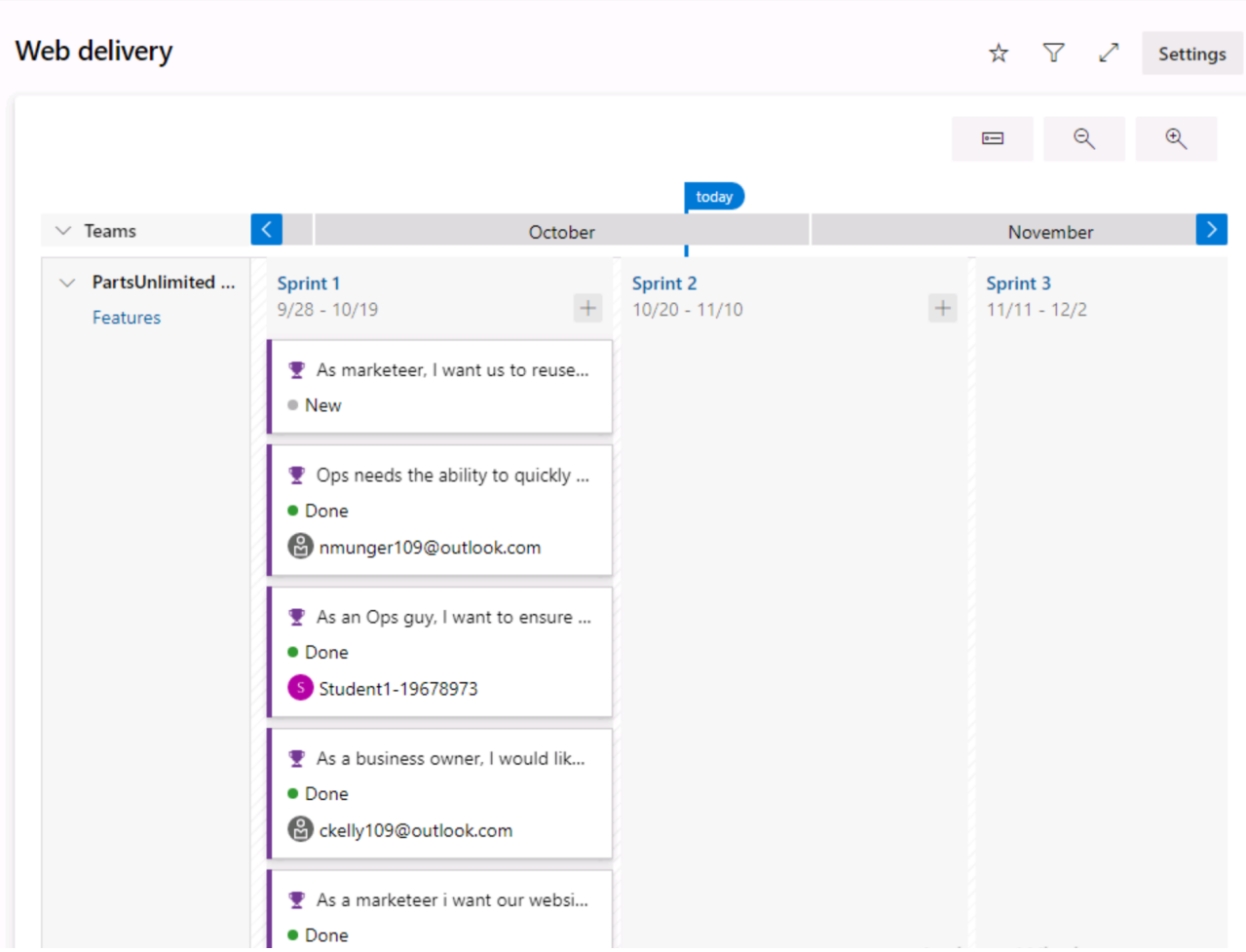
3. Enter following information for the new Delivery Plan:

    - **Name**: **Web delivery**.
    - **Project**: **PartsUnlimited**
    - **Team**: **PartsUnlimited Team**
    - **Backlog**: **Features**
    - Click **Create**.

> You could also organize your deliveries by Stories if you used that model instead. There is also the option to add additional teams and criteria to filter stories/features by, but we'll revisit those later.

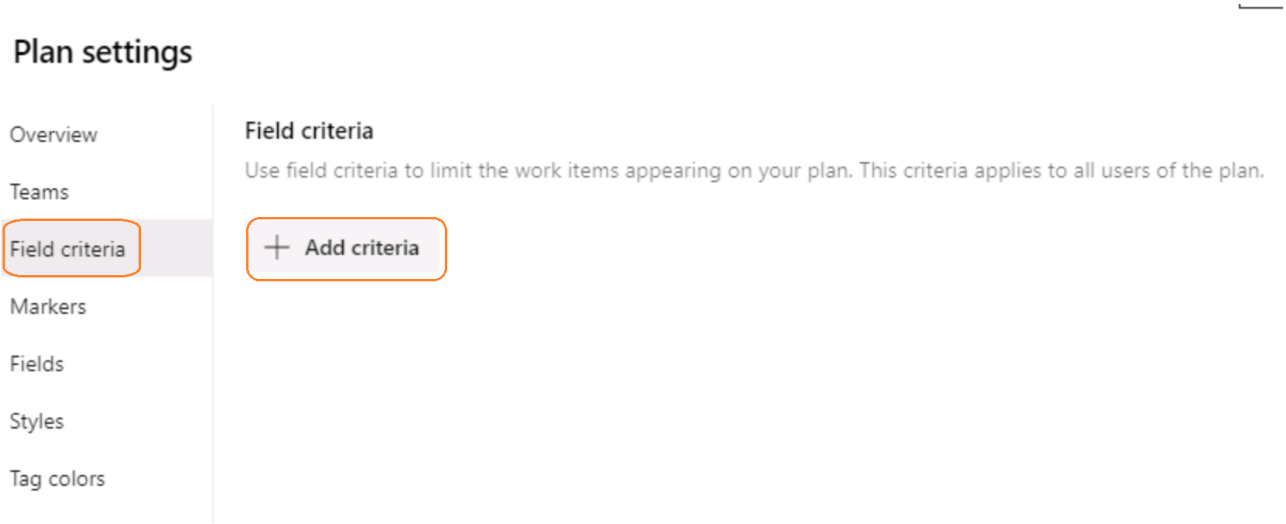


4. You can notice that "Today" marker is at the beginning of Sprint 2. You have a number of Features listed for delivery in the previous sprint. You can also see an empty Sprint 3. Note that some of the Features shown are Done. Although it's useful to see the progress of work, we'll use that as an example by which to filter items out in a moment.

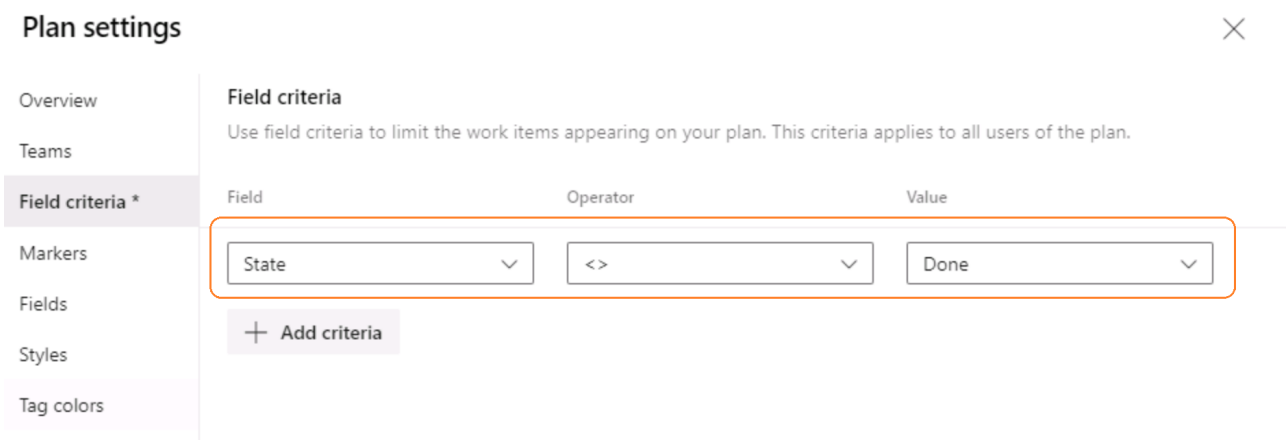


5. Click on **Settings** at the top-right corner of the "Web delivery" plan.

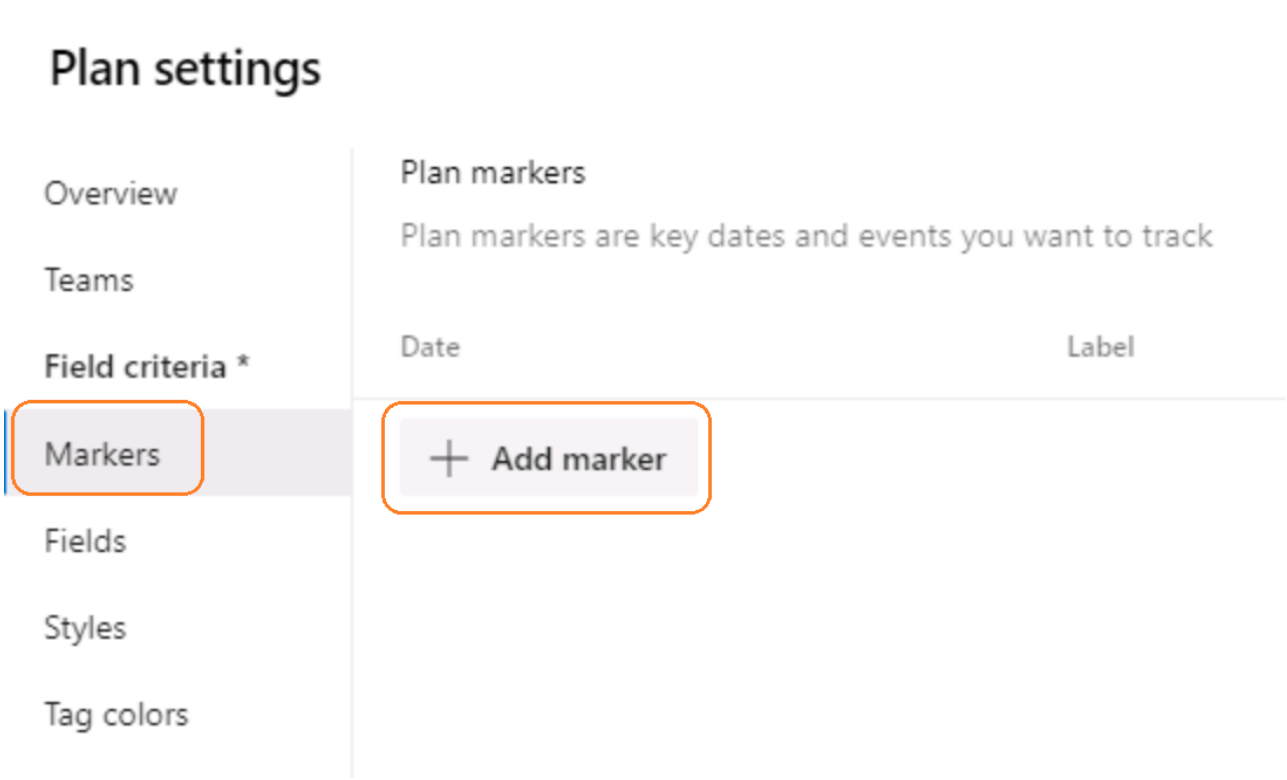
6. Select the **Field criteria** tab and click **+ Add criteria**.



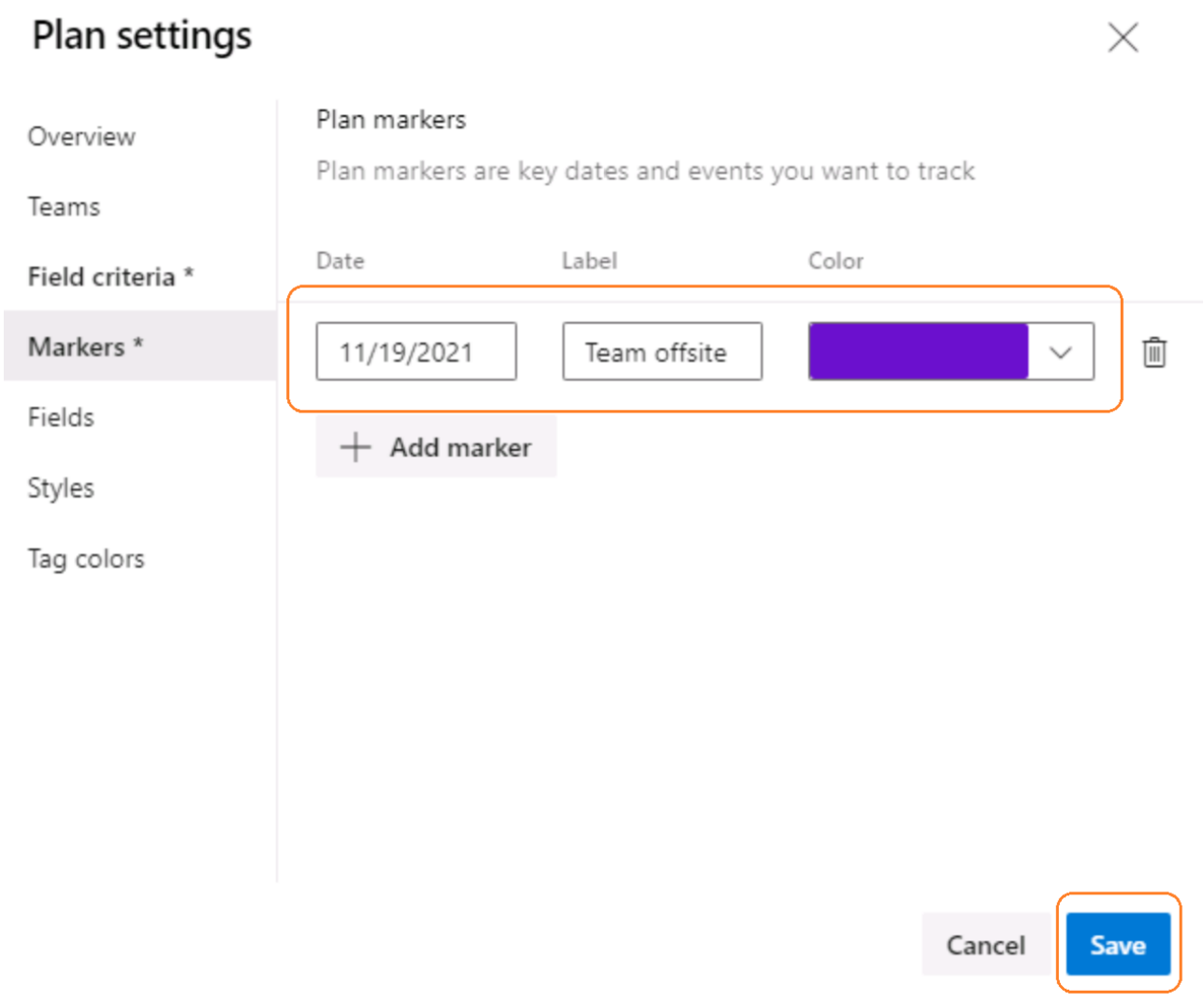
7. Set the new criteria to filter down to items where **State** is **not equal (<>)** to **Done**.



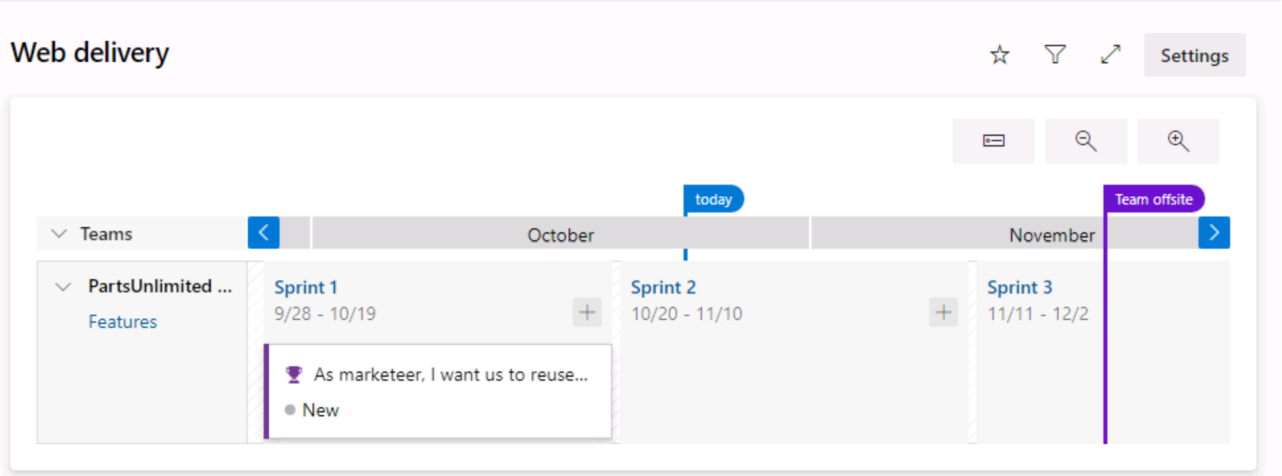
8. Click on **Markers**. You can add a custom marker to keep track of significant dates. Click **+ Add marker**.



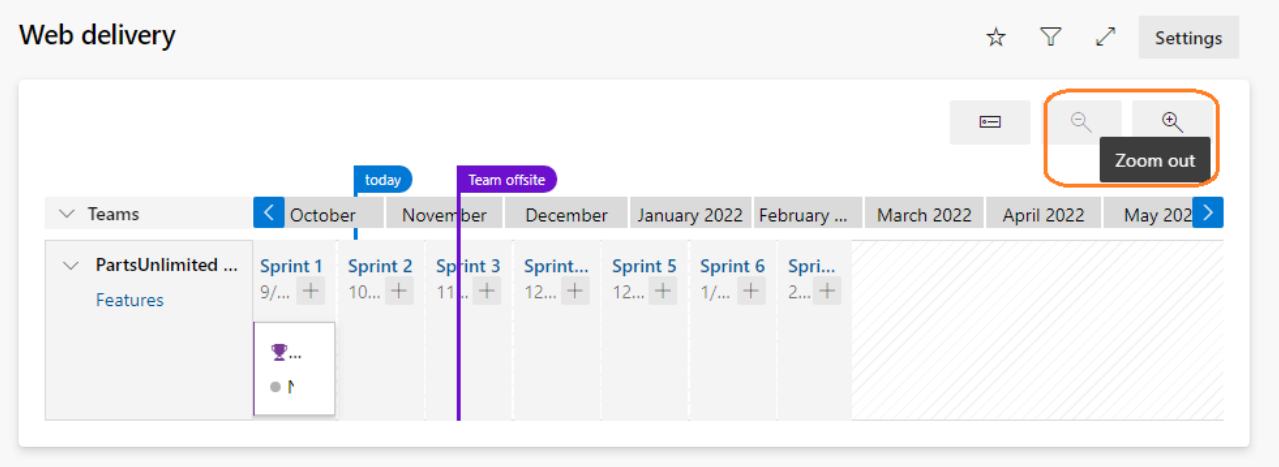
9. Select the **fourth Friday from today** (it will be the Friday in the middle of Sprint 3) and set the **Label** to **Team offsite**. Leave the defauly color and click **Save**.



10. The first thing to notice is that the "Done" Features are no longer visible on the delivery plan due to the criteria set in the configuration. In addition, there is now a "Team offsite" marker in the middle of Iteration 3.



11. Another neat feature of the delivery plan extension is the ability to easily scale the calendar. Click **Zoom out** all the way through to view multiple months at once.



12. Similarly, you can clik on **Zoom in** to view a much more precise view.

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 4: Managing Delivery Plans

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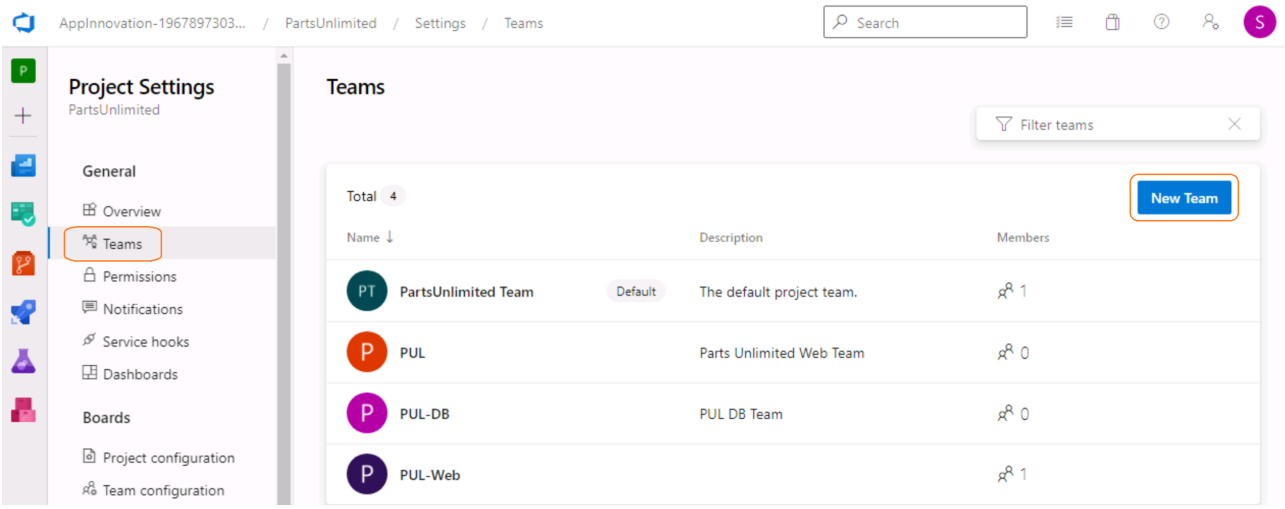
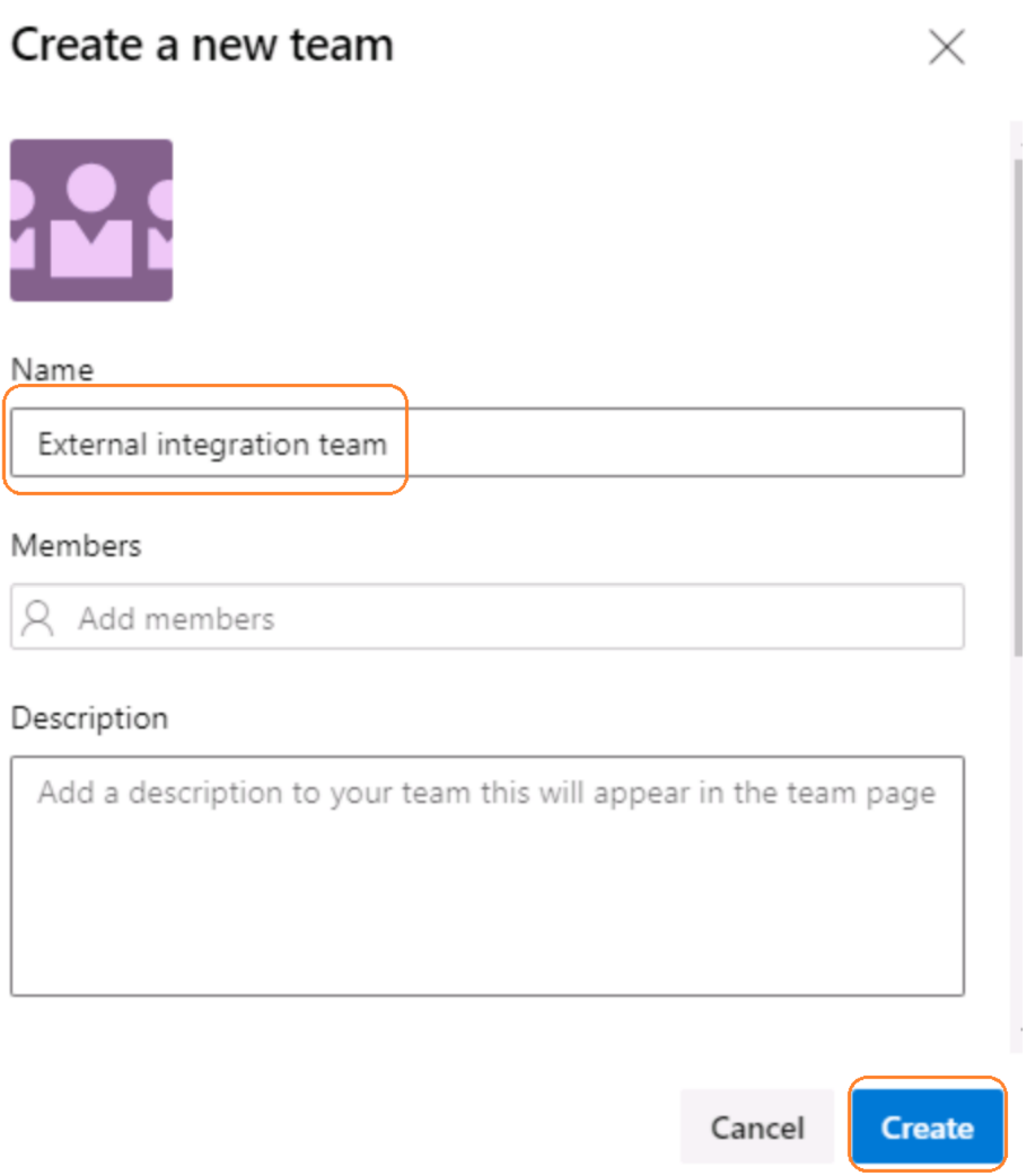
Task 2: Adding an external team to the project

1. Your Delivery Plan has been pretty simple so far because you only have the one team. However, the real power of delivery planning comes into play when orchestrating multiple autonomous teams across their efforts. Click **Project settings** for the **PartsUnlimited** project in Azure DevOps Services.

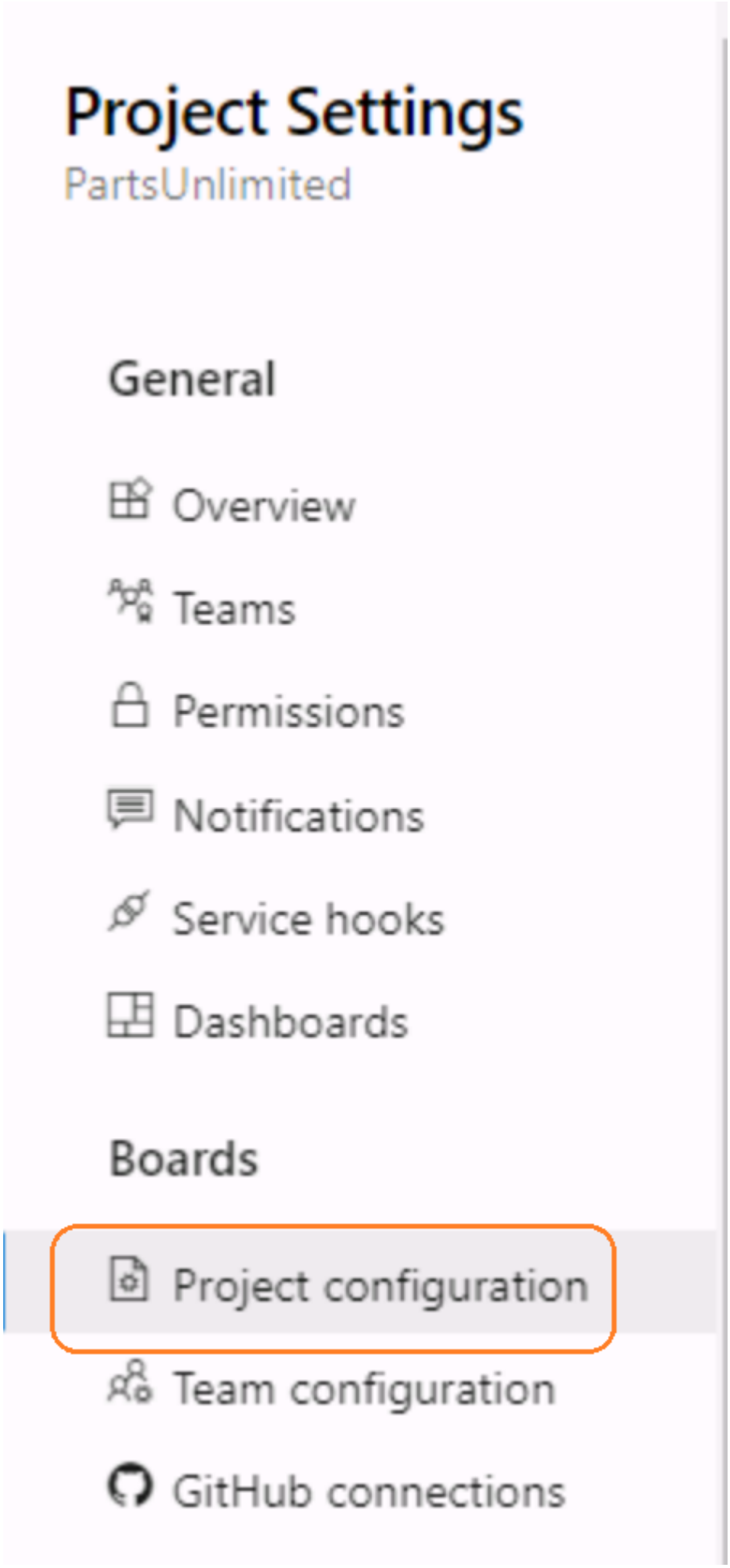
2. From the **Teams** tab, Click **New team**.



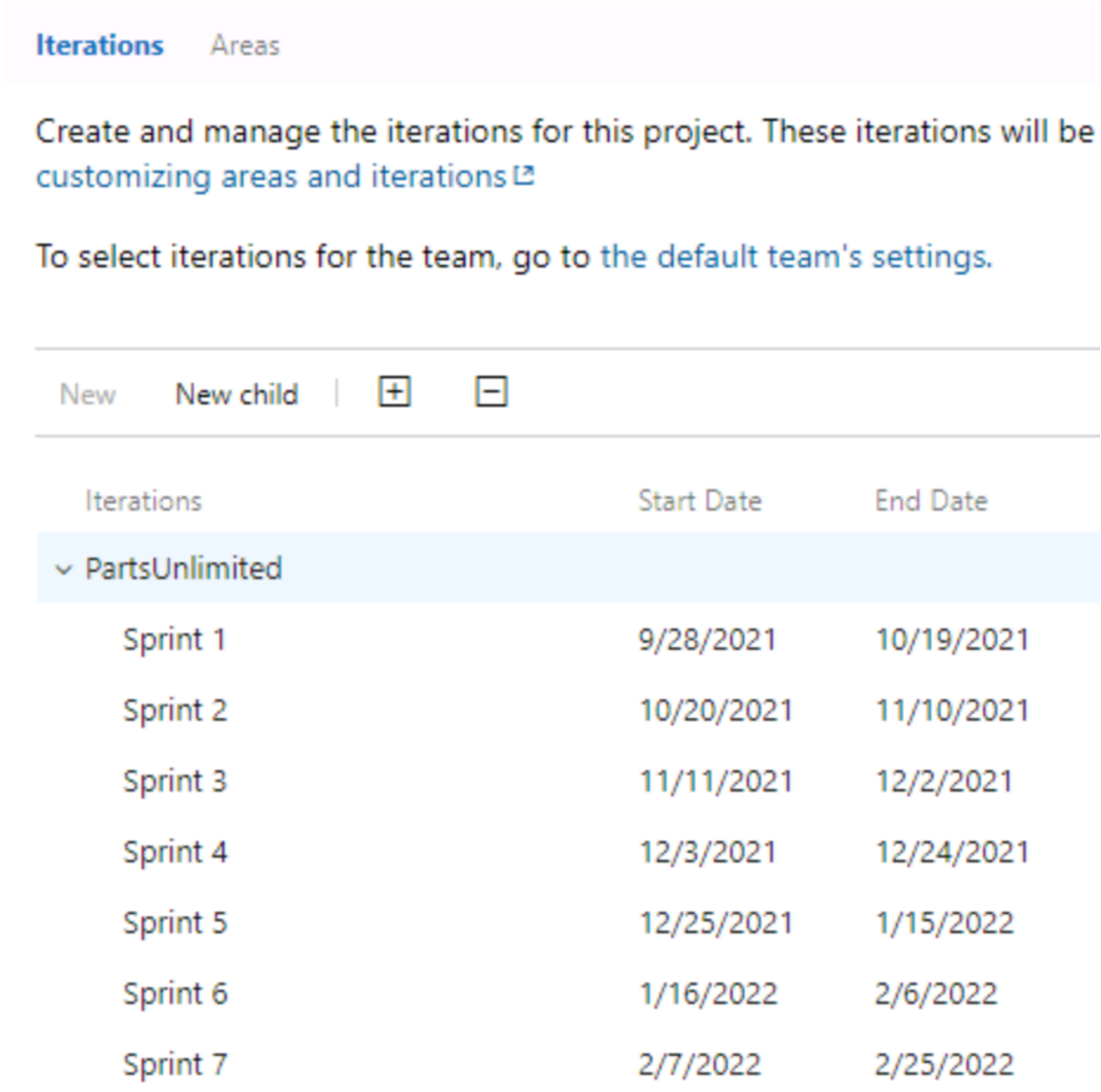
3. This new team will be responsible for the efforts that involve integrating with external services, such as 3rd party services for things like weather forecasts and payment processing. Set the **Name** to **External integration team** and click **Create**.



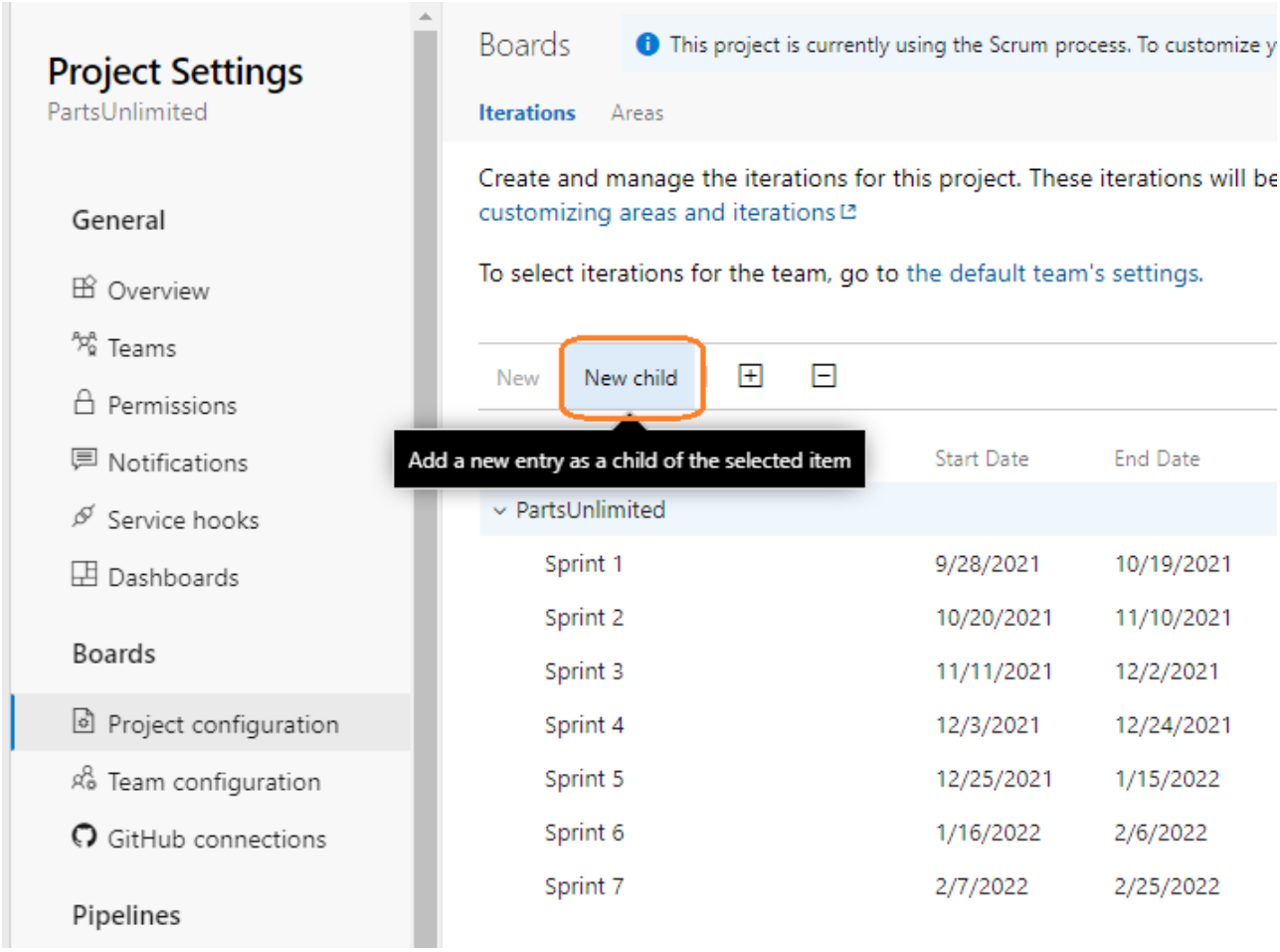
4. Select the **Project configuration** tab under **Boards** of **Project settings**


Project Settings
PartsUnlimited
General
Overview
Teams
Permissions
Notifications
Service hooks
Dashboards
Boards
Project configuration
Team configuration
GitHub connections

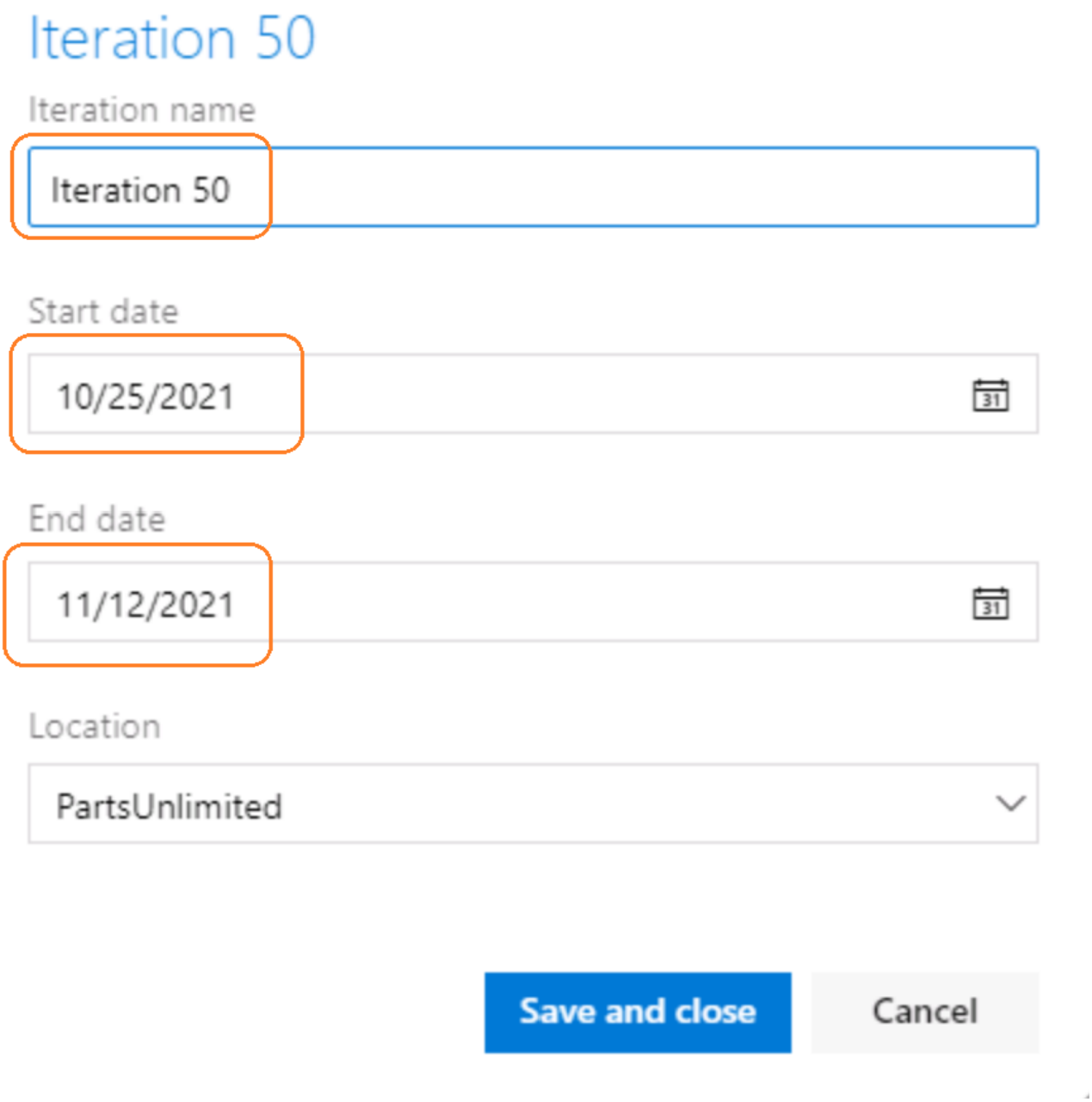
5. Note the dates Sprint 2 and Sprint 3, which will vary for your account based on when you generated the project data.



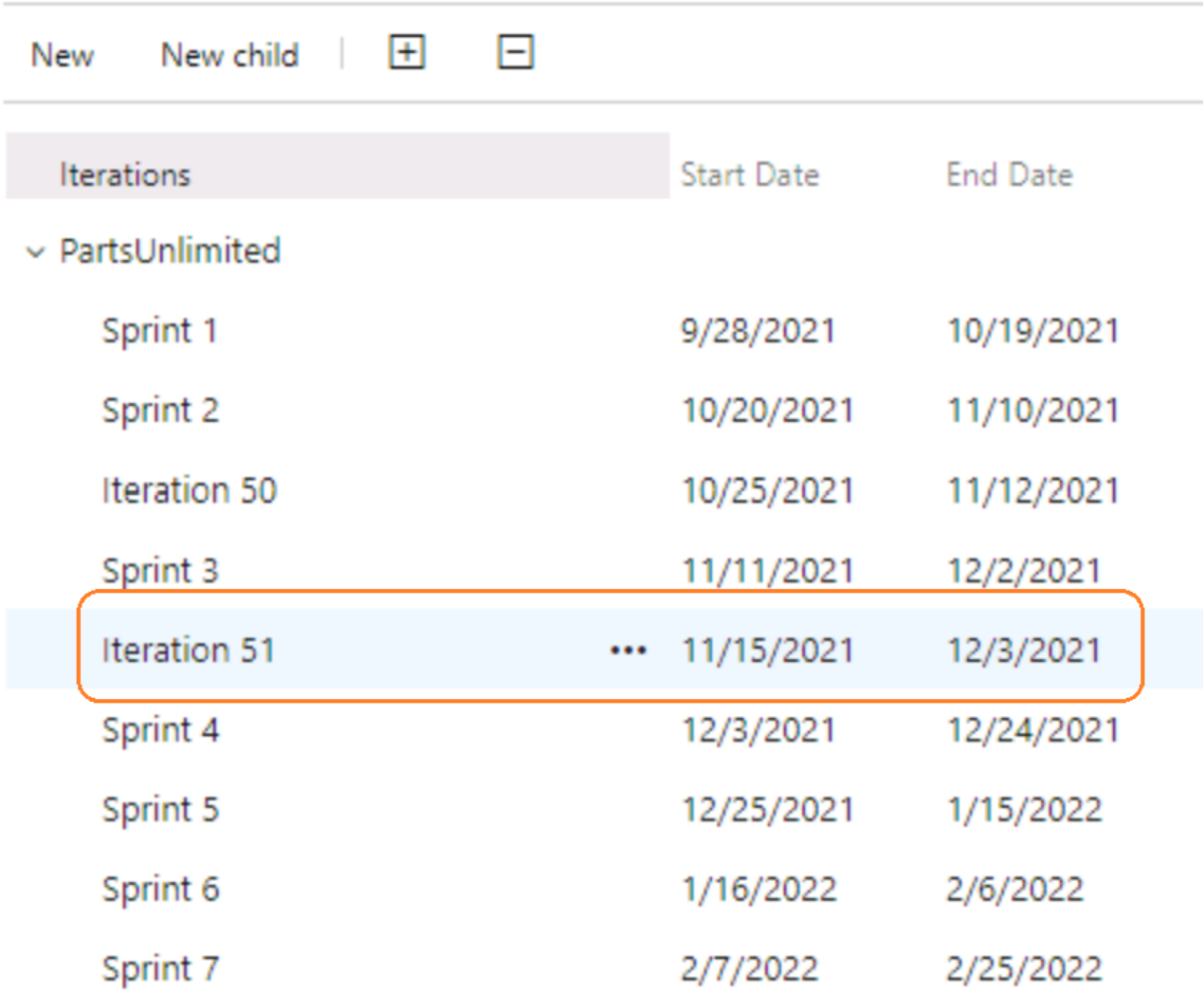
6. We're going to add two new iterations for the external services team that do not align exactly with the main team's schedule. With the root PartsUnlimited node selected, click **New child**.



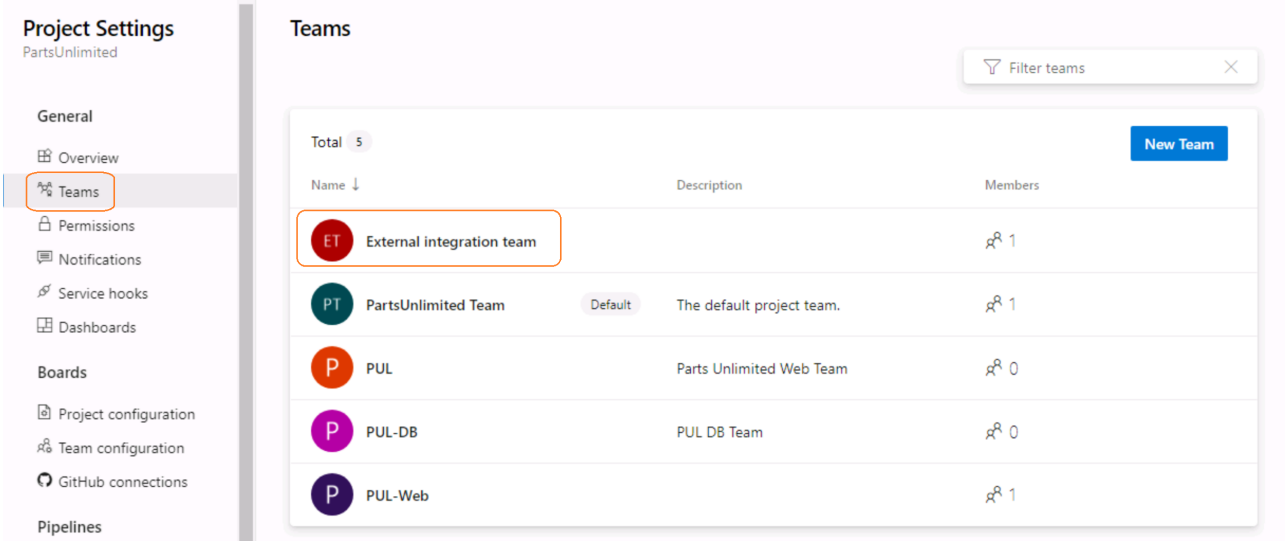
7. Set the **Iteration name** to **Iteration 50**. Use **Monday of the current week** as the **Start date** and set the **End date** to **three Fridays from today**. This will also happen to be the day of the team offsite. Click **Save and close**.



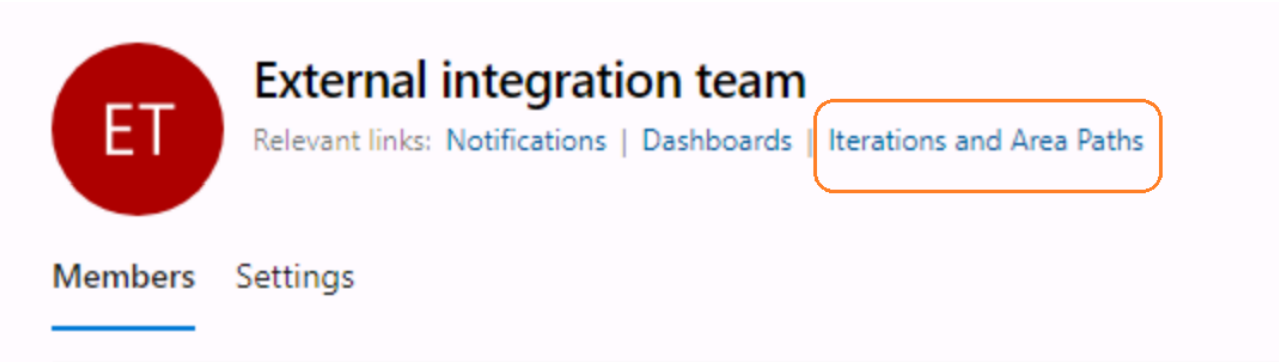
8. Use the same process to add **Iteration 51** that starts the **Monday after Iteration 50 ends** and has an end date **three Fridays later**.



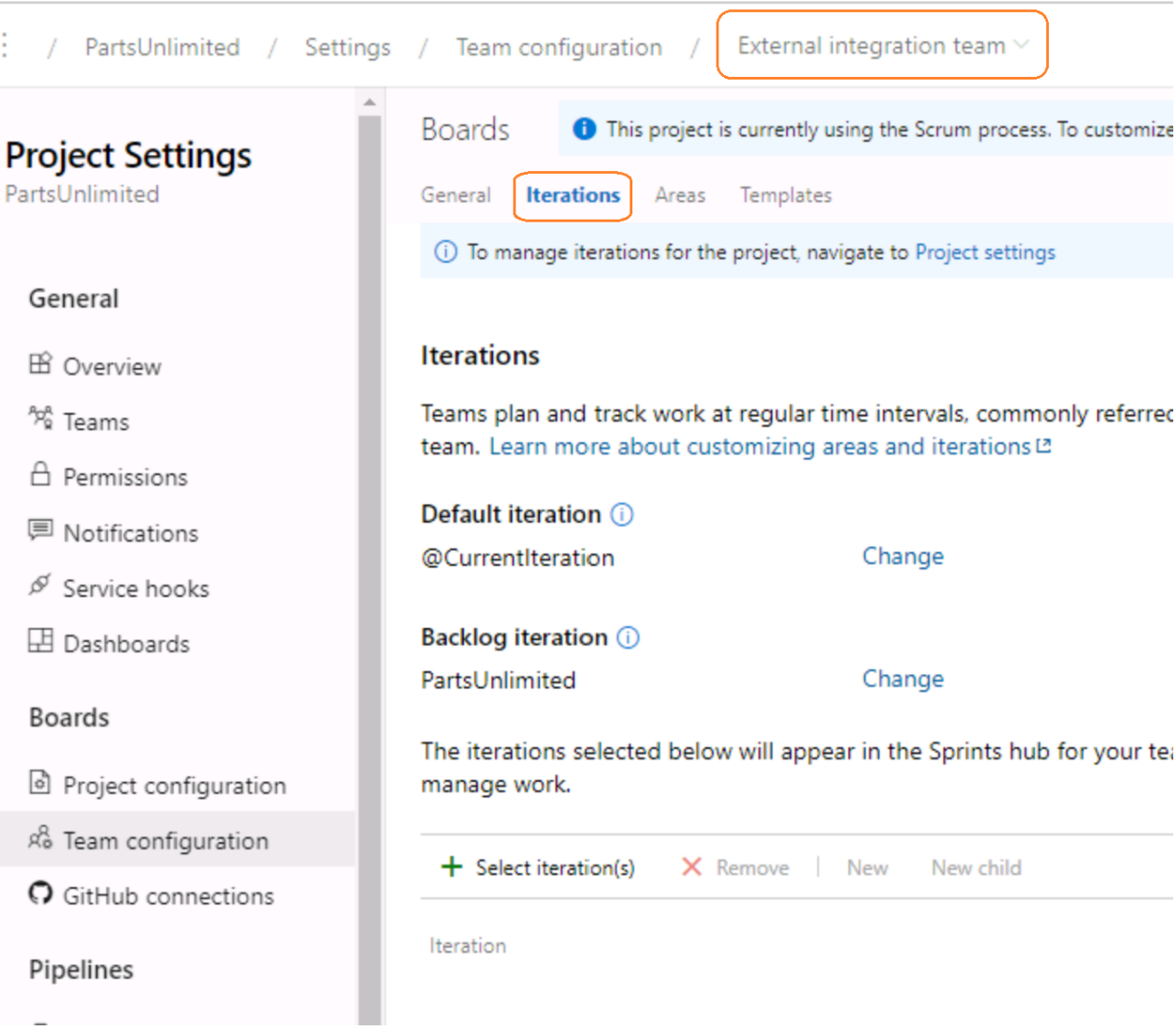
9. Now we need to configure the new team to use those new project sprints as its iterations. Select the **Teams** tab and click **External integration team**.



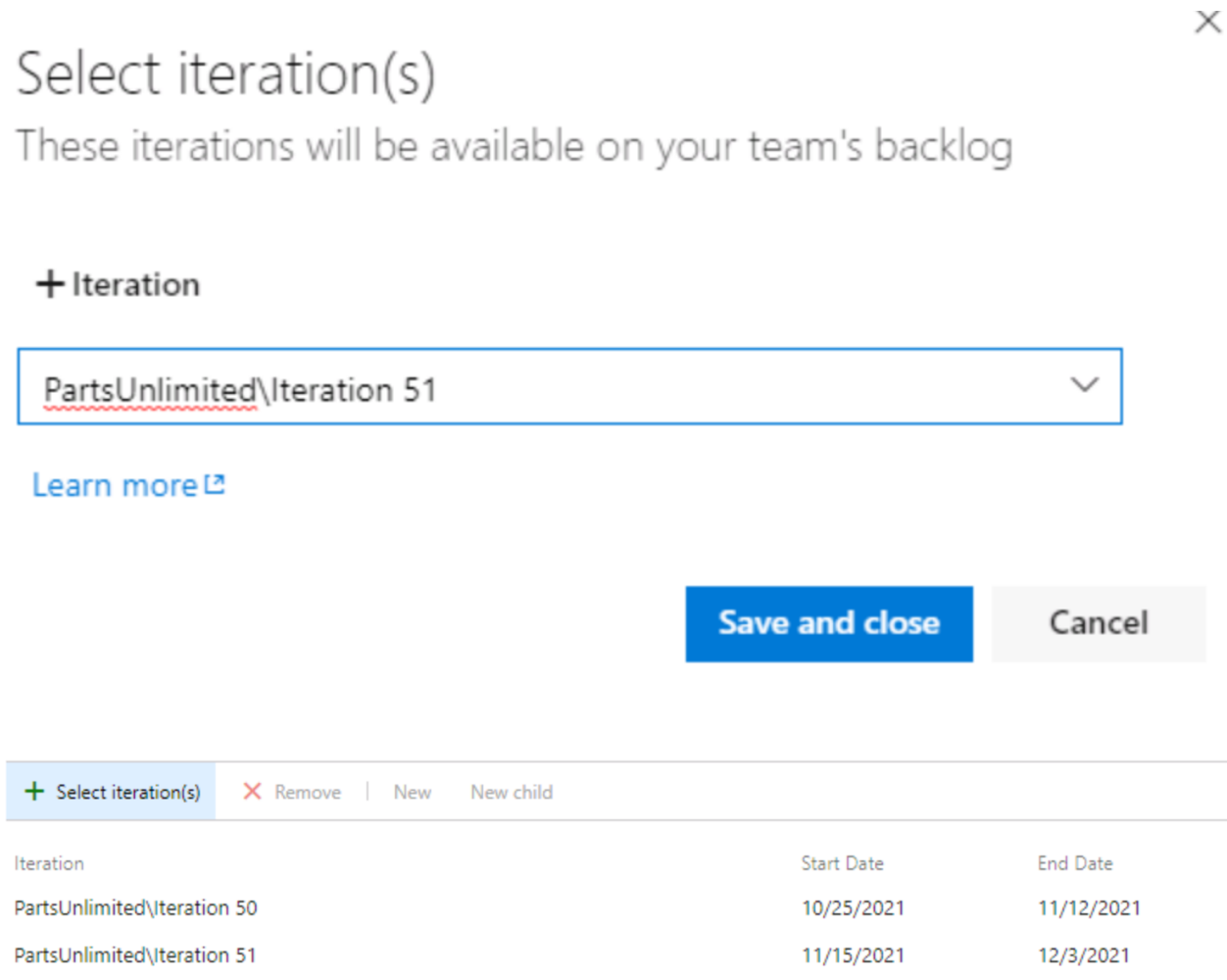
10. Click **Iterations and Area Paths**.



11. Select the **Iterations** tab.



12. Click **+ Select iteration(s)** and use the dropdown button to select **Iteration 50** and **Iteration 51**. Click **Save and close**.


Select iteration(s)
These iterations will be available on your team's backlog
+ Iteration
PartsUnlimited\Iteration 51
Learn more
Save and close
Cancel

+ Select iteration(s)
Remove
New
New child
Iteration
Start Date
End Date
PartsUnlimited\Iteration 50
10/25/2021
11/12/2021
PartsUnlimited\Iteration 51
11/15/2021
12/3/2021

Module 7: **Azure Boards - Plan & Track Projects**, **Lab 1: Plan & Track Projects**, Exercise 4: Managing Delivery Plans

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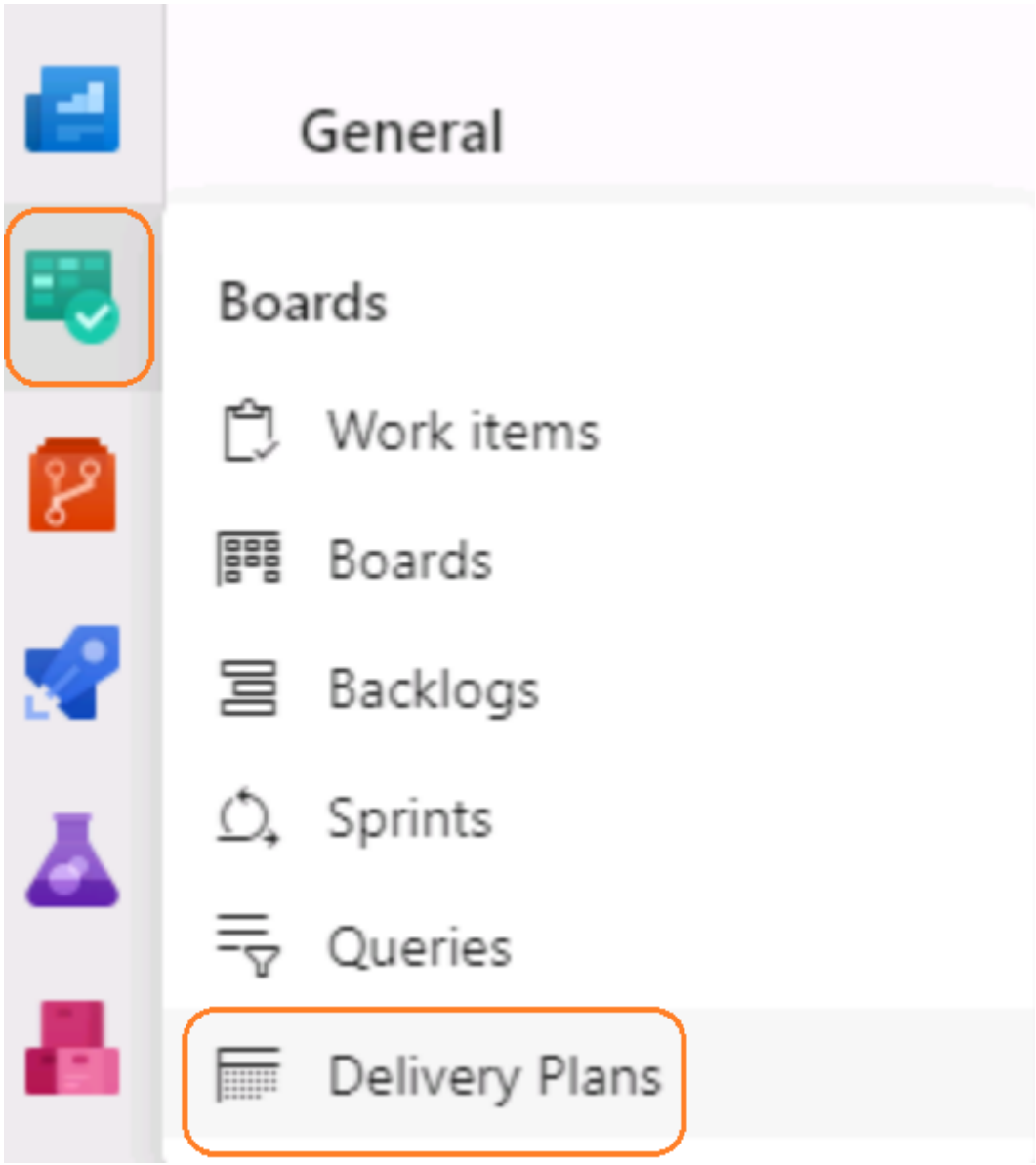
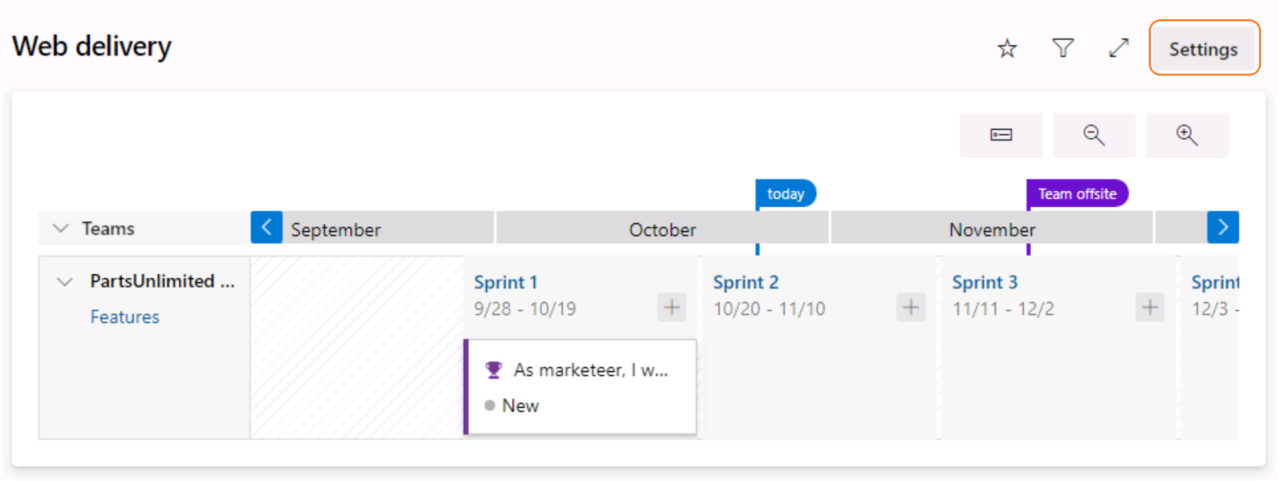
Task 3: Making delivery decisions

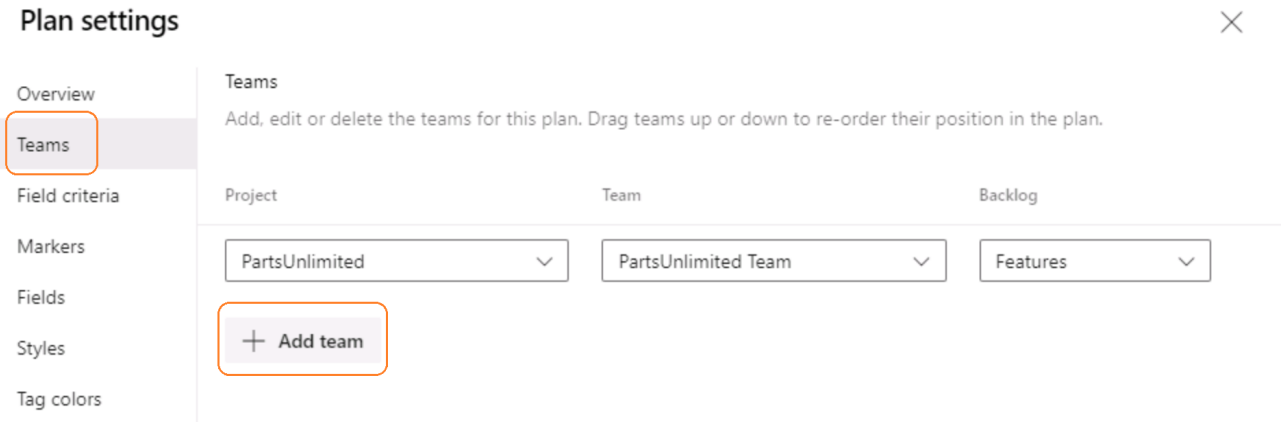
1. Move back to **Boards | Delivery Plans**.



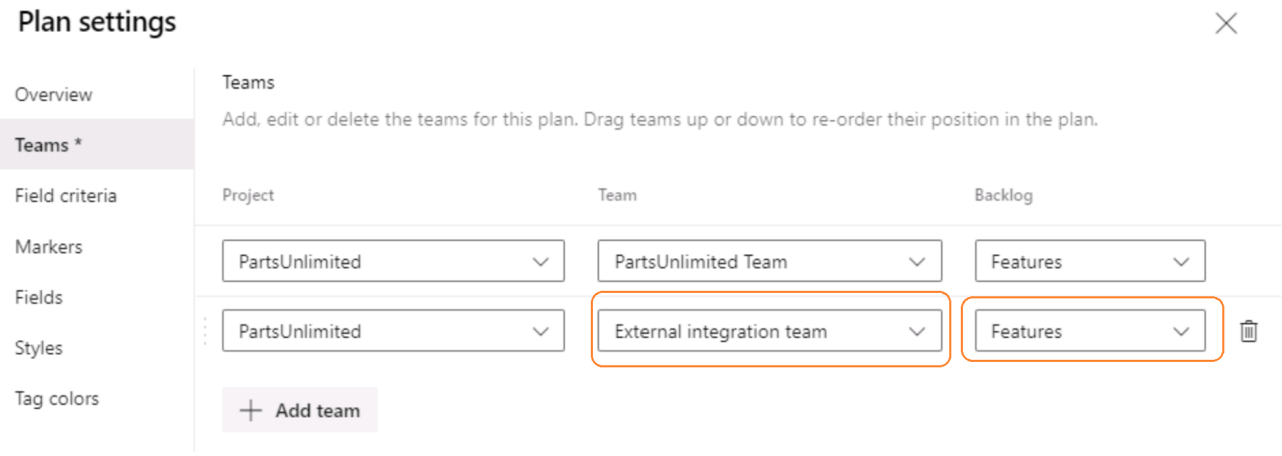
2. Select **Web delivery** plan and click **Settings** button.



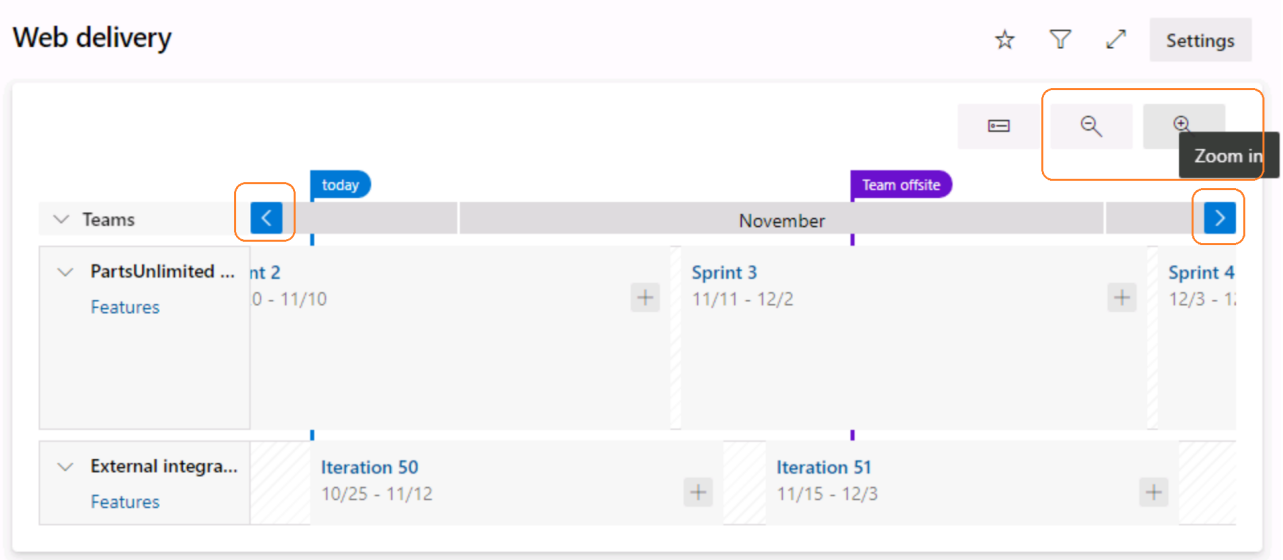
3. Select the **Teams** tab and click **Add team**.



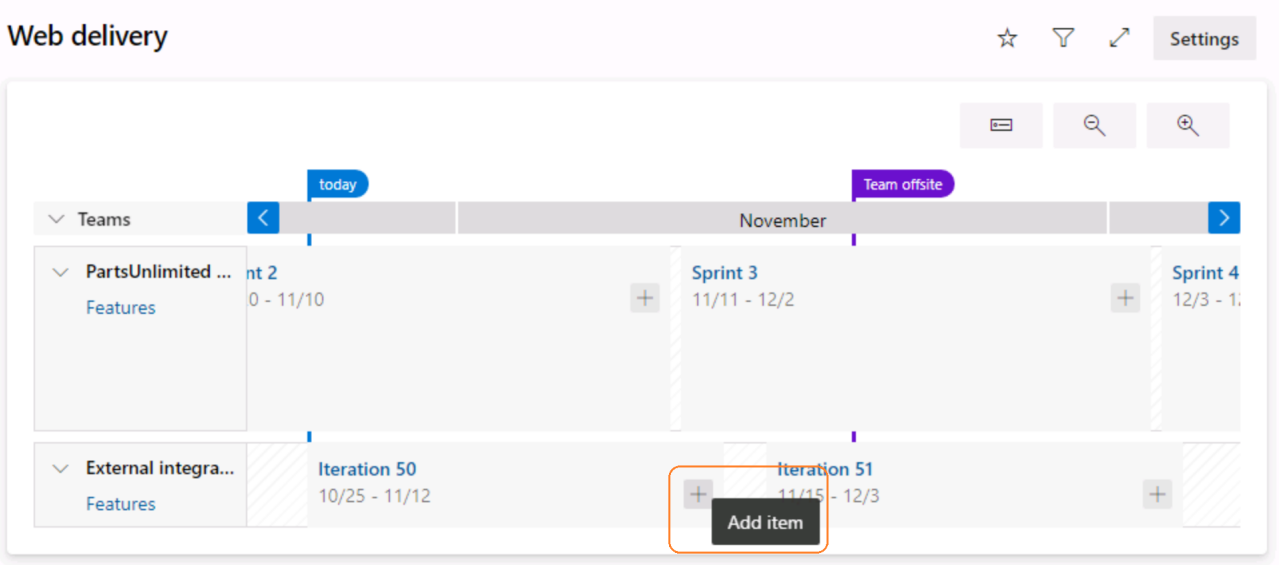
4. Select the **External integration team** as the **team** and **Features** as **Backlog**. Click **Save**.



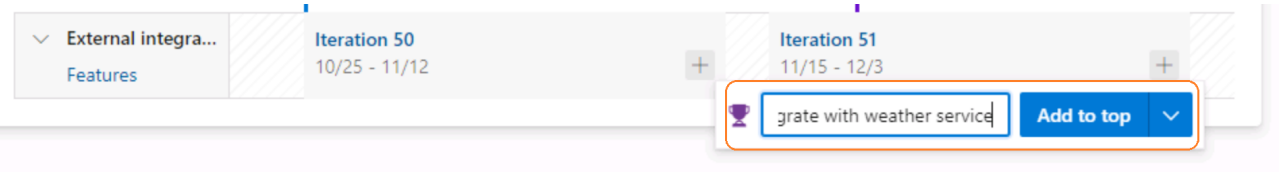
5. Use the **Zoom in/out** settings and the **calendar slider** to fit the width of Iteration 50 and Iteration 51.



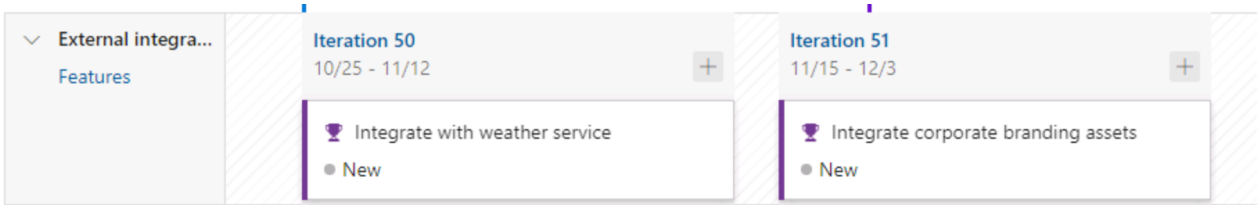
6. The new team doesn't have any Features added yet. Fortunately, you can add them directly to their team and iteration using the inline functionality of the Delivery Plan. Select the **Iteration 50** iteration. Click the **New item** button that appears.



7. Enter **Integrate with weather service** and press **Enter**. This item is now in the backlog with its area and iteration configured.

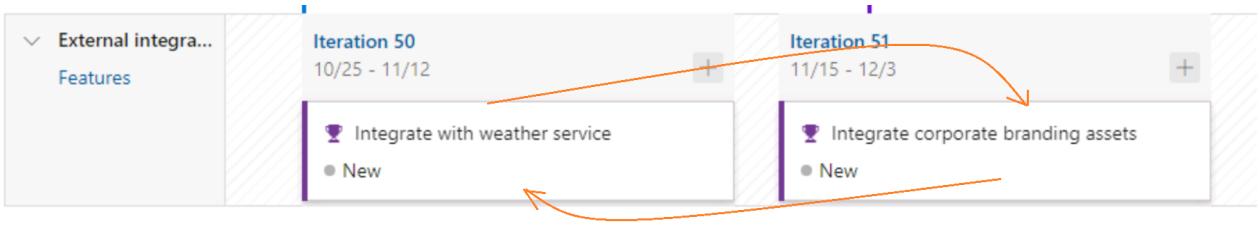


8. Follow the same process to add an item **Integrate corporate branding assets** to Iteration 51.

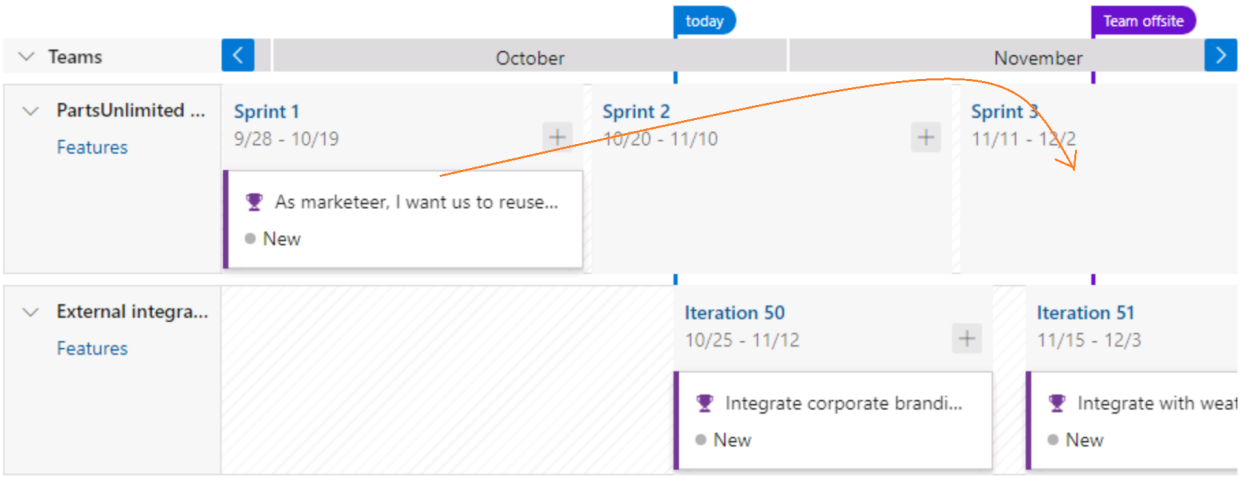


> Now you can step back to see how these two teams are working toward our common goals. Upon closer examination, it appears that the main team is planning to reuse some corporate branding assets during the current sprint that will not be available until well after it's over. It's a good thing you have this view to catch these sorts of potential problems early on.

9. The first thing you should do is to move the branding integration work to an earlier iteration. **Drag and drop** the **Corporate branding assets** Feature onto **Iteration 50**. In order to free up the bandwidth, **drag** the **Weather service** Feature onto **Iteration 51**.



10. Next, **drag** the **branding** Feature from **Sprint 1** to **Sprint 3** so that there's a chance the dependencies will be available in time for this team to be unblocked.



11. Now we can review the delivery plan again. It should be more feasible now.