ADO (Azure Dev Ops)

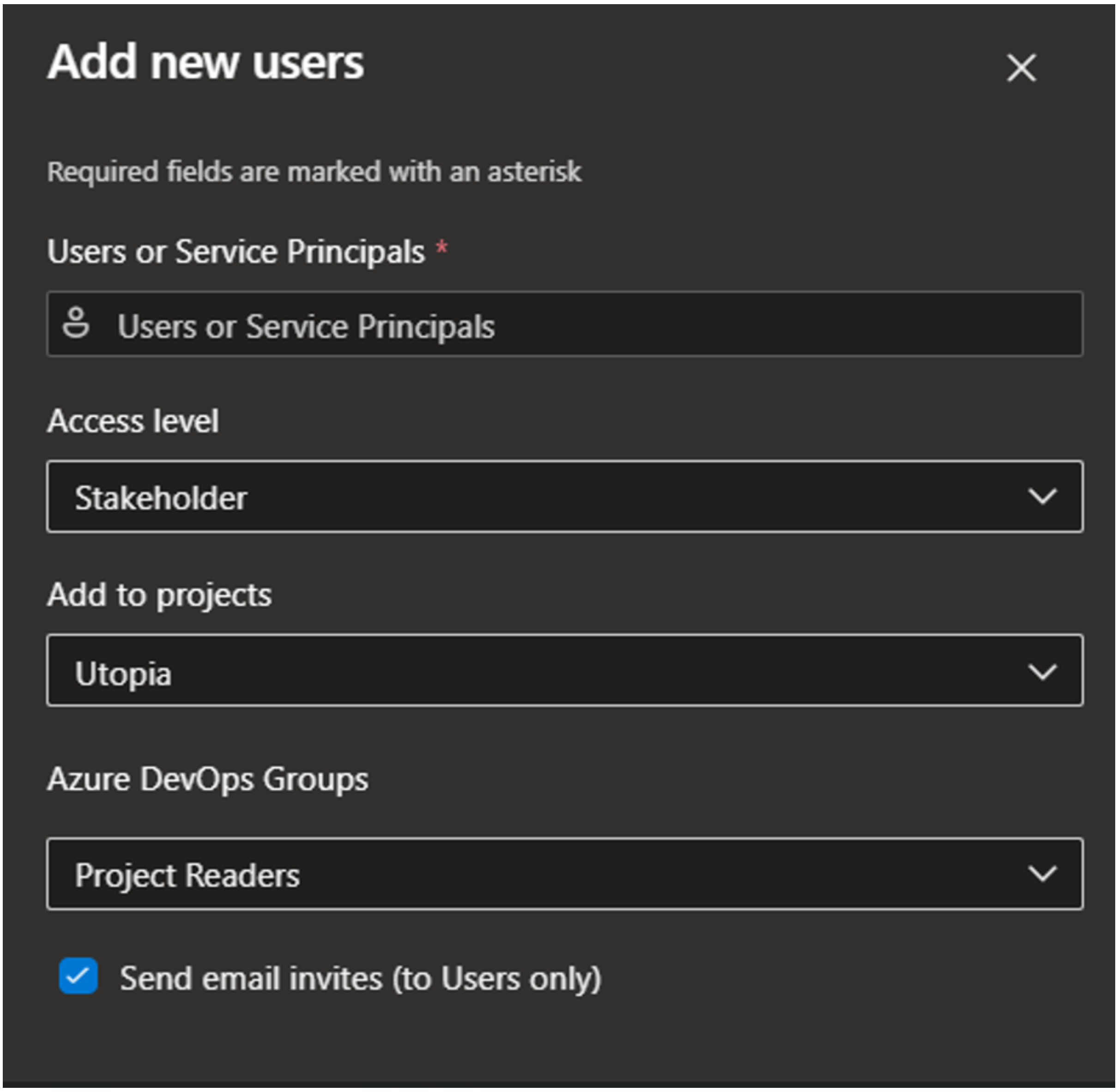
- Provisioning Stakeholders
- Finance Bucket Property

Provisioning Stakeholders

We provision stakeholders for users that just need to be able to view and track work items in ADO. We have unlimited stakeholder licenses and they are free.

Steps

1. Go to https://dev.azure.com/eFileCabinet
2. Click on ***Organnization Settings*** in the bottom left corner
3. In the nav menu on the left side of the screen, select ***Users***
4. Click the ***Add User*** button in the top right corner of the table with all the users
5. Fill out the all the fields as shown in the screen shot below, as well as the email of the user to add



Finance Bucket Property

> Dashboard can be found here

We have a field on our bugs and stories called ***Finance Bucket***. We use it to quickly find how many work items were completed each month in particular categories that we use in some of the reports we send to finance at the end of each month.

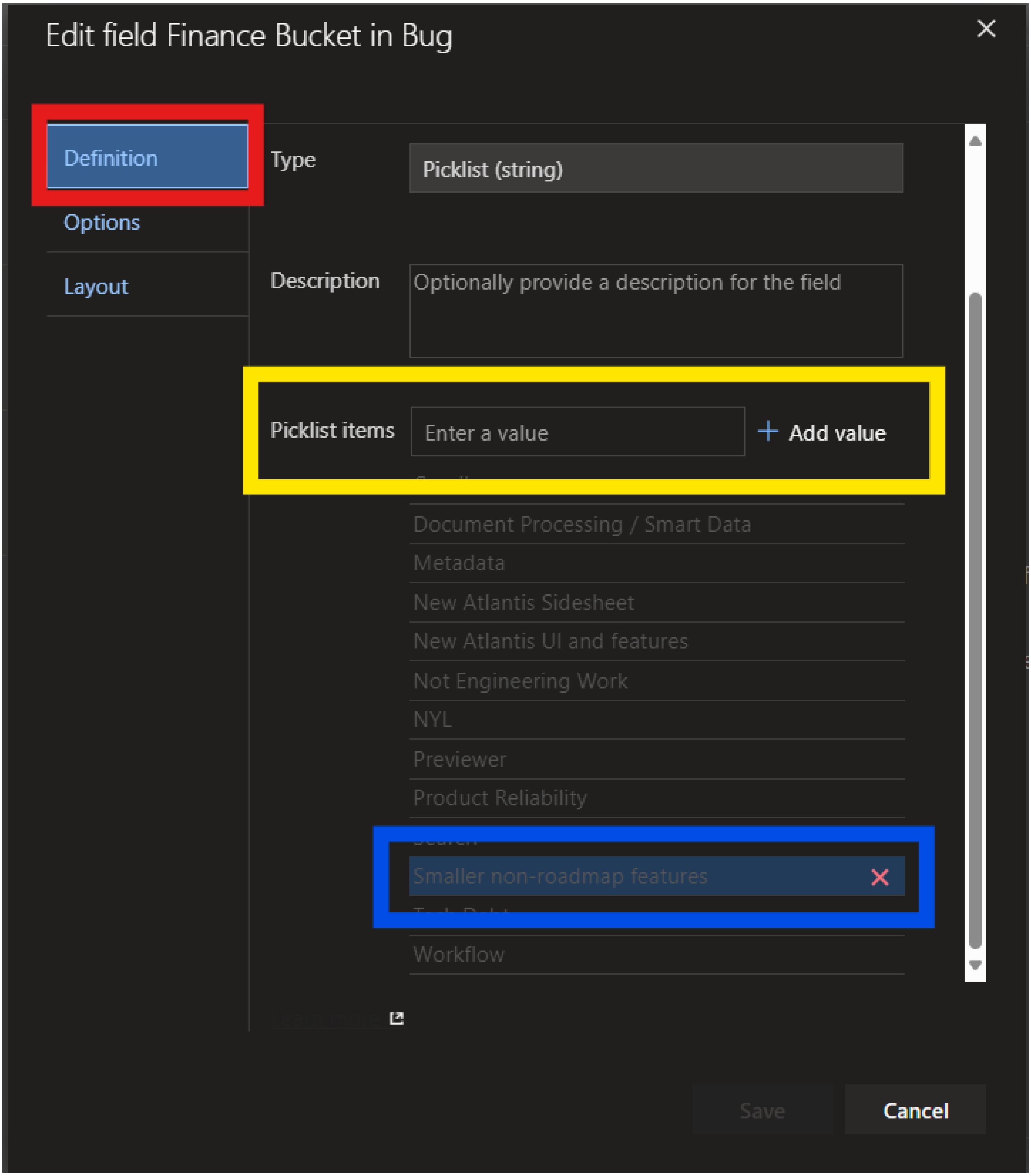
We have a dashboard in ADO as well, where you can see the numbers from the previous month.

Adding a New Option

Update ADO Field

To change the selectable options in this field, use the following steps

1. You may need certain admin permission in order to do this
2. Go to https://dev.azure.com/eFileCabinet
3. Click on ***Organization Settings*** in the bottom, left hand corner
4. Click on ***Process*** in the navigation bar along the left side of the screen
5. Make sure you have the ***Processes*** tab selected, and click on ***Custom Agile*** (which may be hidden under the ***Agile (default)*** dropdown.
6. Click on the **Story** item
7. Click on the three dots when hovering the ***Finance Bucket*** field, and select the ***Edit*** option in the dropdown that appears
8. In the modal that pops up, select the ***Definition*** tab (outlined in ***RED)***
9. You can add options by entering text in the text input next to ***Picklist Items*** and clicking the **'+'** icon next to it (highlighted in ***YELLOW***)
10. You can remove items by hovering an item, and clicking the red **'*X*'** icon that appears (outlined in ***BLUE***).
11. Make sure you hit the ***Save*** button near the bottom right corner when you are finished.
12. This will update the options on both bugs and stories. You don't need to repeat these steps for the Bug work item definition.



Updating the Dashboard

The dashboard can be found [here] and you will need permission to edit the dashboard. At the time of this writing Quinn, Royce, David, and Kelsee should all have permission to do this. All the queries that power this dashboard are in the Monthly Finance Report folder.

1. Add a shared query to query the items closed last month that have the finance bucket option set to the newly created option.

   - The easiest way to do this is to select the editor tab after selecting an existing query, and change the `'and Finance Bucket ='` clause to the newly created option, then select ***Save As*** from the ***3 dot menu*** in top right corner of the screen, and give the newly created query the same name as the added option.
2. Add a tile to the dashboard for the newly created option
   1. Navigate to the [dashboard]
   2. Click the ***Edit*** button in the top right corner
   3. In the right panel that appears, type ***Query Tile*** in the search bar, select the ***Query Tile*** option, then click the ***Add*** button in the bottom right-hand corner of the screen.
   4. The new tile should appear next to all the other tiles
      1. click the ***Configure*** button in the new tile
      2. select the newly created shared query from in the ***Query*** dropdown
      3. change the color to grey to match the other tiles
      4. click the save button in the bottom right-hand corner
      5. feel free to drag the tile to the location of you choosing
   5. There should now be a ***Done Editing*** button at the top of the screen to save the change you just made.