Volusia County Clerk of Court IT Development Team Triage Handbook

Performing Triage on VCCoC Dev Team Tickets

Author:
Dalton Hooper, CBAP®, CSM
dhooper@clerk.org

last saved 6/21/2021 11:22 AM

Table of Contents

Table of Figures

Introduction

Glossary of terms

The following is a glossary of terms that may be used in this document.

Term	Meaning
Agile	Relating to or denoting a method of project management, used especially for software development, that is characterized by the division of tasks into short phases of work and frequent reassessment and adaptation of plans
Backlog	A list of features or technical tasks which the team maintains and which, at a given moment, are known to be necessary and sufficient to complete a project or a release.
BAU	**Business As Usual**. A Classification category contained as an attribute of a ticket. A ticket is classified as a BAU describes a task that a user needs performed which requires the unique skills or tools of the IT department. It is a task which the user is not equipped to handle themself.
Break-Fix	A Classification category contained as an attribute of a ticket. A ticket is classified as a Break-fix if the reported issue is describing a system or app behaving in a way not expected.
CSM	**Certified Scrum Master**
Daily Stand-up	A daily status meeting of the Dev Team. The meetings are usually time-boxed to between 5 and 15 minutes, and take place with participants *standing up* to remind people to keep the meeting short and to-the-point.

Volusia County Clerk of Court

Term	Meaning
Description	Each Spiceworks ticket Description area contains verbiage entered by the creator of the ticket. Typically, the Description area contains a synopsis of the issue needing attention as well as the specific action being requested.
Dev Team / IT Dev Team	The Development Team within the VCCoC IT department. In general, the Dev Team deals with those facets of IT related to the development and maintenance of software.
Enhancement	A Classification category contained as an attribute of a ticket. A ticket is classified as an Enhancement if the reported issue is requesting a new software feature or functionality.
Internal Note	A special type of Comment in Spiceworks wherein any information entered is only distributed to the writer's team. ( )
Kanban	Kanban is an Agile method for managing the creation of products with an emphasis on continual delivery while not overburdening the development team.
OPs	The **Operations** Team within the VCCoC IT department. In general, OPs deals with those facets of IT not related to software development or maintenance.

Term	Meaning
Portfolio Board	A committee (comprised of the Clerk of Court, VCCoC Directors, and selected managers et al) was formed in mid-2017 for the purpose of approving and prioritizing requests for enhancements (as opposed to BAU or Break-fix requests). The Portfolio Board meets once a month to review and discuss each new request and to (re)prioritize the order in which the VCCoC IT department will begin work on the enhancement. Enhancement requests that are approved by the Portfolio Board during a monthly meeting become tickets ASAP following the meeting – but not beforehand.
QA	**Quality Assurance**
Scrum	Scrum is one of the Agile development processes. In *Scrum*, a product is built by a self-forming team in a series of fixed-length iterations called sprints.
Scrum Master	A scrum master is the facilitator for an agile development team utilizing Scrum. The scrum master manages the process for how information is exchanged.
Spiceworks	The tool used by the VCCoC organization to document and track all IT issues, including BAUs, Break-fixes, and Enhancements
Sticky / "Stickie"	A Post-*it*® note attached to a whiteboard in the Daily Stand-up area. The *Post-it*® note contains minimal, but essential, information about a ticket. Generally, the color of a particular sticky is meaningless, with the exception of a red sticky, which is used to call attention to a ticket that has been classified as High priority.
Ticket	A trackable unit within Spiceworks representing a single BAU, Break-fix, or Enhancement issue.

Term	Meaning
Tier I support	The first level of IT support given to resolving BAU or Break-Fix tickets. This level primarily - but not exclusively - involves determining whether the issue described in the ticket needs to be resolved by IT Operations or Dev, and assigned accordingly.
Tier II support	The next higher level of IT support given to resolving BAU or Break-Fix tickets. This involves investigating the stated issue for any additional clarity or insight and documenting those findings, as well as defining the precise action being requested by the ticket.
Time-bound / Time-boxed	A work effort having a pre-defined or expected duration.
Triage	In the context of this handbook, triage refers to the work effort that takes place to ensure that the "resolver" (Programmer, BA, etc.) of a ticket, in order to achieve resolution, has sufficient information to adequately understand the nature of the ticket and the request being made.
Triage Specialist	The role on the Dev Team responsible for performing triage on all tickets assigned (by OPs) to *Scrum Master*. (Note: This is a role and, not necessarily, a title.)
UAT	**User Acceptance Testing.** The final level of testing; it is typically performed by the potential user(s) of the feature/function being tested.
VCCoC	**Volusia County Clerk of Court**

Intended Audience

This *VCCoC Dev Team Triage Handbook* is intended as an informational and training guide for **anyone in the role of performing Triage** on tickets incoming from OPs assigned to the Spiceworks username *Scrum Master*.

Background

Prior to November, 2017, the IT Dev Team was implementing a "Kanban" type of Agile process wherein a Daily Stand-up took place every morning, with the entire Dev team participating. Each assigned ticket was represented on a whiteboard by a "sticky" (i.e., Post-*it*® note) with the ticket number, name of the ticket, type of ticket (BAU, B/F, or Enhancement), and the name of the person assigned. Each Dev team member would take turns giving status regarding the tickets assigned to them.

Beginning in November, 2017, the IT Dev Team moved from a "Kanban" Agile process to a "Scrum" Agile process. Dalton Hooper, being a CSM, took on the role of Scrum Master at that time. The primary difference in the process was that the work would be performed in two or three-week iterations called sprints. At the beginning of each sprint, the team assembled and determined which tickets could be developed and deployed within the next sprint. Assignments were made at that time. Any unassigned tickets were placed in a sprint "backlog". The Daily Stand-ups continued to be held each morning, but transitioned from being a "status" meeting to a brief synopsis from each person, limited to "What I completed yesterday, What I plan to complete today, and I have *n* blockers."

The Scrum method quickly proved to be untenable in our environment as we have many unscheduled types of tickets (BAUs and Break-fixes) that come into existence at random times during a sprint (a.k.a., "fly-ins"), which must be dealt with ASAP, rendering the employment of time-bound iterations futile.

In January, 2018, The IT Director, ███████████, created a new position of Dev Manager and ███████████ was promoted into it. At this point, ████ and the Scrum Master developed a unique process which incorporated aspects of an Agile process with attributes customized for our distinctive environment. The new process eliminated the "time-bound" aspect of the Scrum sprints, as well as the sprints themselves. Rather, there would be a "virtual" username created in Spiceworks to which all tickets not currently assigned to a "real" person would be assigned. This virtual username is called *Dev Distribution Group*.

As a programmer completes the ticket to which they are currently assigned and needs new work, they run a Spiceworks report (*!!_Tickets in Dev Distribution Group Available for Reassignment*) which shows all the tickets currently assigned to username *Dev Distribution Group*. The programmer selects the ticket on which they wish to work next and reassigns the ticket from the username *Dev Distribution Group* to themself. The programmer then creates a sticky representing the ticket and places it on the whiteboard for discussion at the next Daily Stand-up.

Under this new process, the Daily Stand-up – still facilitated by the Scrum Master – returned to being more of a combined status meeting, group discussion, and knowledge transfer. Each Daily Stand-up is not intended to run more than ten minutes, if possible. Discussions not pertaining to the whole group are taken off-line. Incumbent in this unique process is the new role of Triage Specialist. The purpose of this handbook is to provide information and training for that role.

The Ticket Lifecycle Process

In brief, the process is as follows:

1. A user having an issue e-Mails/calls the OPs support desk with details about a BAU or Break-fix issue.

2. The OPs support person makes an initial decision as to whether the ticket should be handled by the Dev Team or OPs.

3. If it is to be handled by the Dev Team, the support person assigns the ticket to Spiceworks username *Scrum Master*.

4. The person on the Dev Team performing the role of triage (i.e., Triage Specialist) receives the ticket and performs the necessary triage.

5. The ticket is then reassigned to Spiceworks username *Dev Distribution Group*.

6. The next available Dev Team member (usually a Programmer) selects a ticket from those assigned to *Dev Distribution Group* (by running the report called *!!_Tickets in Dev Distribution Group Available for Reassignment*) and reassigns it to themself.

7. The Programmer resolves the BAU or Break-fix issue and reassigns the ticket to the Spiceworks username *QA Distribution Group*.

Volusia County Clerk of Court

8. A Tester performs QA testing and facilitates UAT.

9. The Tester reassigns the ticket back to the Programmer for deployment.

10. The Programmer reassigns the ticket to Spiceworks username *Deploy Distribution Group*.

11. The ticket is subsequently approved (or not) for deployment by both the Dev Manager and the OPs Manager.

12. If approved by both the Dev and OPs Manager, the ticket is deployed (often by an OPs person).

13. The Programmer verifies that the ticket was deployed.

14. The Programmer (re)assigns the ticket to themself.

15. The Programmer closes the ticket.

Triage

Role of the Triage Specialist

The Triage Specialist is a Tier II support role and is a member of the IT Dev team. This involves investigating the stated issue for any additional clarity or insight and documenting those findings, as well as defining the precise action being requested by the ticket.

The Triage Process

Perform preliminary analysis

Upon determining that a ticket has been issued and OPs IT Support has assigned it to *Scrum Master*, the Triage Specialist should perform the following tasks:

Receive the ticket

The person performing the Triage Specialist role monitors Spiceworks for any new tickets assigned by OPs to *Scrum Master*. This monitoring can be performed by running the Spiceworks report titled *!!_New Tickets for Scrum Master from OPs*.

> NOTE: It is recommended that the Triage Specialist keep a window open with this report in it and refresh the window frequently. If a new ticket has come in for the Dev Team, it will appear on this report upon refresh.

Reassign the ticket to yourself

In order to make it known that you are aware of the ticket and are currently performing analysis on it, reassign the ticket from *Scrum Master* to your personal Spiceworks username (e.g., *Dalton Hooper*). This should prevent duplication of effort by anyone else attempting to also perform analysis on this ticket, unaware that it is already in progress.

Attempt to understand the issue

Perhaps most importantly, the Triage Specialist needs to – as much as possible – understand the issue represented in the ticket. The understanding does not necessarily have to be at a deep technical level, but at a minimum, the Triage Specialist should at least understand what the creator of the ticket is requesting and why they are requesting it. In order to gain this level of

understanding, the Triage Specialist should feel free to leverage the following techniques, if needed:

- A phone conversation with the user

- A visit to the user's workstation (If they are located at the DeLand courthouse) to view the issue firsthand

- Launch a test copy of the application related to the issue (e.g., CCMS, Case Management, Official Records, Document Review, etc.) and attempt to replicate the issue (if B/F) or understand what is being requested (B/F or BAU)

- Search for and review any past tickets with a similar or identical issue

- Talk to an IT member (Dev or OPs) who has expertise in the knowledge area desired

Determine the ticket Priority

The Triage Specialist can set a ticket's priority to one of the following:

- High

> Note: Whenever the Triage Specialist determines that a ticket should be set at a High priority, a red sticky should be created by the Triage Specialist and immediately placed on the white board in the "High Priority" area. See Figure 1 to learn what information should be placed on the sticky.
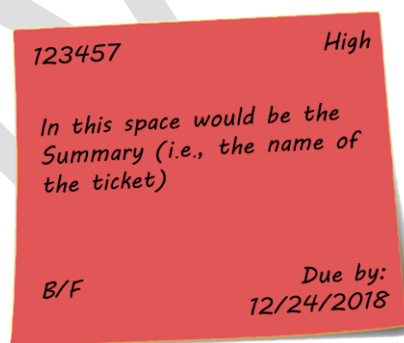
Figure 1 Sticky for High Priority ticket

The criteria for setting a ticket to High priority are limited to one of the following reasons:

- The ticket is adversely affecting one or more **Appeals** cases

- The ticket is adversely affecting the ability of a **Judge** to perform their duties

- The ticket is adversely affecting the **financial** interests of the Clerk's office

- The ticket is adversely affecting an **entire team**

- The ticket is adversely affecting a **statutory** requirement

Note: Setting a ticket to High priority which does not meet one of the above criteria requires the Dev Manager's concurrence.

- Medium

  This is the default priority and is used on most tickets

- Low

  A ticket is typically set to Low priority when there are no perceivable adverse consequences of resolving the ticket ahead of all High and Medium tickets. A common example of a Low priority ticket would be a BAU classification that involves data cleanup or minor aesthetics.

Determine the ticket Due Date (if any)

Note: Whenever the Triage Specialist determines that a non-High priority ticket should contain a due date, a yellow sticky should be created by the Triage Specialist and immediately placed on the white board in the "Due Date" area. See Figure 2 to learn what information should be placed on the sticky.
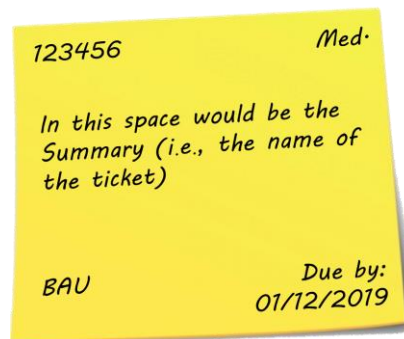
Figure 2 Sticky for ticket with due date

Most tickets do not have due dates. In some instances, however, a ticket needs to be complete either *by* a specific date or *on* a specific date. To set a due date on a ticket, click on the Due Date dropdown list (Figure 3) after retrieving the ticket in Spiceworks. Pick the desired due date from the choices presented. (Figure 3)

> *Note: At times the Triage Specialist may have a ticket which represents a critical issue, but does not meet the criteria for High priority. The Triage Specialist can often satisfy the need by assigning a due date (e.g., today?) to the ticket, but leaving it as Medium priority.*

Figure 3 Example of Due Date dropdown

Determine the ticket Classification

Click on the *Details* view of the ticket (Figure 4)

Figure 4 Location of Details link

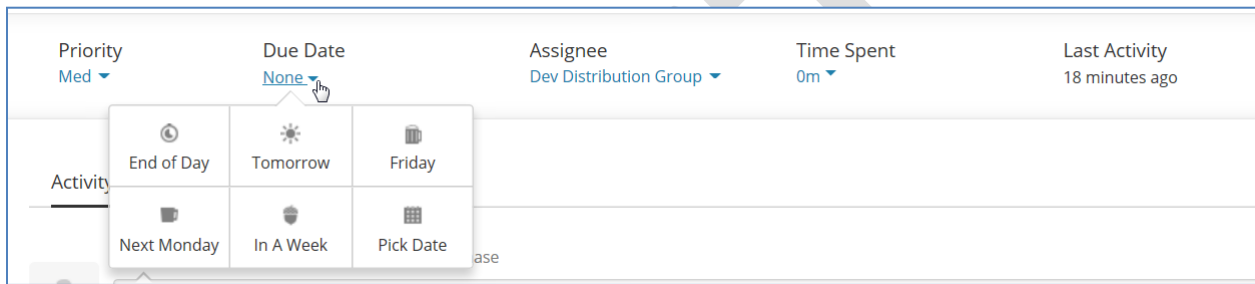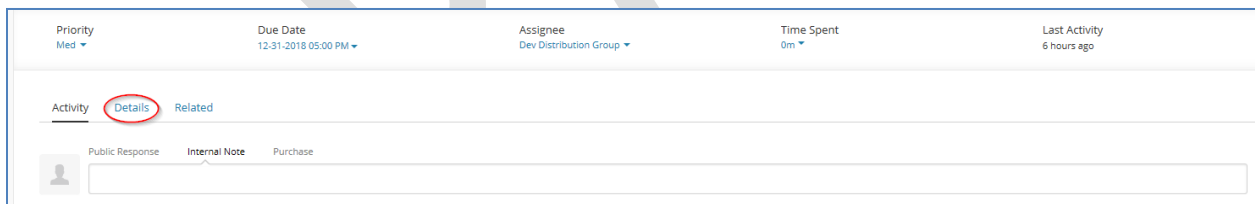Within the *Details* section of the ticket, there is a subheading entitled *Classification* (Figure 5). The Triage Specialist is responsible for determining the type (i.e., *Classification*) of request being made by the ticket. Typically, such a determination can be made by reading the text contained in the *Description* area of the ticket to get a sense of whether the issue is a BAU, Break-Fix, or Enhancement. Infrequently, the *Classification* is not obvious from reading the *Description* and deeper triage is needed.

Upon determination of the appropriate *Classification*, select it from the dropdown (Figure 5).
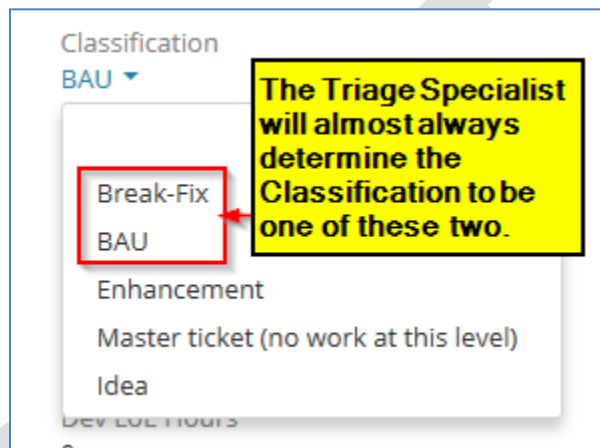
Figure 5 Classification selections

Note: if the preliminary analysis determines that the request is an enhancement, special rules apply and triage is not applicable (see the \\▮▮.dotx

NOTE: For an example of a completed CCMS app triage document using this template, see \\▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮.docx

OR triage document template

\\▮▮.dotx

NOTE: For an example of a completed CCMS app triage document using this template, see \\▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮.docx

Web triage document template

\\███

███████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> *\\███████████████████████████████████████*
> *███████████████████████.docx*

Document Review triage document template

\\███

█████████████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> *\\███████████████████████████████████████*
> *████████████████████████████████████.docx*

Reports triage document template

\\███

██████████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> *\\██████████████████████████████████████*
> *███████████████████████████████████.docx*

Triage *Internal Note* templates

The Triage Specialist should insert one of the following two templates into the ticket as an *Internal Note* (copy and paste the most appropriate one, replacing any verbiage found between brackets ([])):

Internal Note template 1 - Triage document created

If triage was performed and a triage document was created, copy and paste this verbiage to create an *Internal Note* in the ticket (also, attach the triage document you created):

Figure 10: *Internal Note* template 1 - Triage document attached

Internal Note template 2 - General

If template 1 is not appropriate, copy and paste the verbiage below to create an *Internal Note* in the ticket:

Figure 11: *Internal Note* template 2 - General

Frequently Asked Questions section of this handbook). Refer enhancement classifications to the IT Dev Manager or CIO for further instruction. The "Master Ticket" classification is defunct and should no longer be used. The "Idea" classification should only be selected after prior authorization from the IT Dev Manager or CIO.

Set the Progress field

Locate the Progress field and make one of the following selections according to your preliminary analysis:

- Triage not performed (default)

- Undergoing triage (this is a temporary category to be used while you are performing triage)

- Triage completed (select this if you have performed triage and added the information to the ticket)

Document the triage

All Spiceworks tickets assigned to *Scrum Master* should be triaged by a Triage Specialist and subsequently, contain some amount of triage information before being re-assigned to a member of the Dev team or a Distribution Group. It is rarely – *if ever* – permissible to allow a ticket to progress beyond the Triage Specialist without some amount of triage information contained on it. The triage information does not necessarily have to be an actual separate document attached to the ticket. Triage information, in many cases, may simply be text entered into the ticket as an *Internal Note*.

Uniformity of documentation

There will always be occasions when the "regular" Triage Specialist is not available and someone else must fill in. A developer attempting to resolve a ticket should expect to have triage information presented in a way that is familiar and uniform, regardless of who composed it. In the interest of uniformity, triage document templates have been created so as to ensure the style and format of each triage are the same.

See the *Document Review triage document* template

\\███████████████████████████████████
████████████████████████████████.dotx

> NOTE: For an example of a completed CCMS app triage document using this template, see
> \\████████████████████████████████
> ██████████████████████████████.docx

Reports triage document template

\\██
████████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> *\\██*
> *████████████████████████████.docx*

Triage *Internal Note* templates and *Triage Document templates* sections of the Appendix for details.

Add an Internal Note to the ticket

The Triage Specialist should insert an Internal Note into every BAU or Break-fix ticket. (For a template, see *Reports triage document template*

\\███
███████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> \\██
> ████████████████████████████████████.docx

Triage *Internal Note* templates

Figure 6: *Internal Note*

The *Internal Note* should state, at a minimum:

1. A description of the issue that is driving the requested action

2. Specifically, what the ticket is requesting to be done

Here is an example of what your entry may look like (Figure 7):

Figure 7: *Internal Note* with example text

Appendix

Setting up the Triage Specialist Workstation

Apps needed

At a minimum, the Triage Specialist will need to be able to launch all of the primary apps, both production and test versions. These include:

- CCMS

- CCMS-UAT

- Case Management (with full menu)

- Citation

- New Official Records

- Document Review

- Reports

> *NOTE: If the Triage Specialist is unable to launch any of the above apps from their desktop, a Spiceworks ticket will need to be created requesting access to the desired app from their desktop. This ticket will need to be approved by the Triage Specialist's manager prior to deployment.*

Directory access needed

At a minimum, the Triage Specialist will need access to the following directories:

- "\\██"

- "\\██
  ████████████████"

> *NOTE: If the Triage Specialist is unable to access any of the above directories from their desktop, a Spiceworks ticket will need to be created requesting the access. This ticket will need to be approved by the Triage Specialist's manager prior to deployment.*

MS-Outlook e-Mail rule

There is a potential for lost communication if a Spiceworks user adds a comment or *Internal Note* to an open ticket while that ticket is assigned to *Dev Distribution Group*. This is because username *Dev Distribution Group* is a "virtual" person and any comment(s) added to a ticket to which username *Dev Distribution Group* is currently assigned will have their comment(s) CC'ed to whomever is listed on the Outlook distribution list *Dev*. It is easy for such an e-Mail to go unnoticed among the myriad of other e-Mails in a Triage Specialist's inbox. This potential problem can be mitigated by utilizing a rule in Outlook. Creating this rule will cause an alert window to pop up on your screen whenever there is activity on a ticket currently assigned to username *Dev Distribution Group*. This way, if a user adds a comment to a ticket that has already been triaged and assigned to username *Dev Distribution Group*, but not yet picked up by a Programmer, the comments won't get lost.

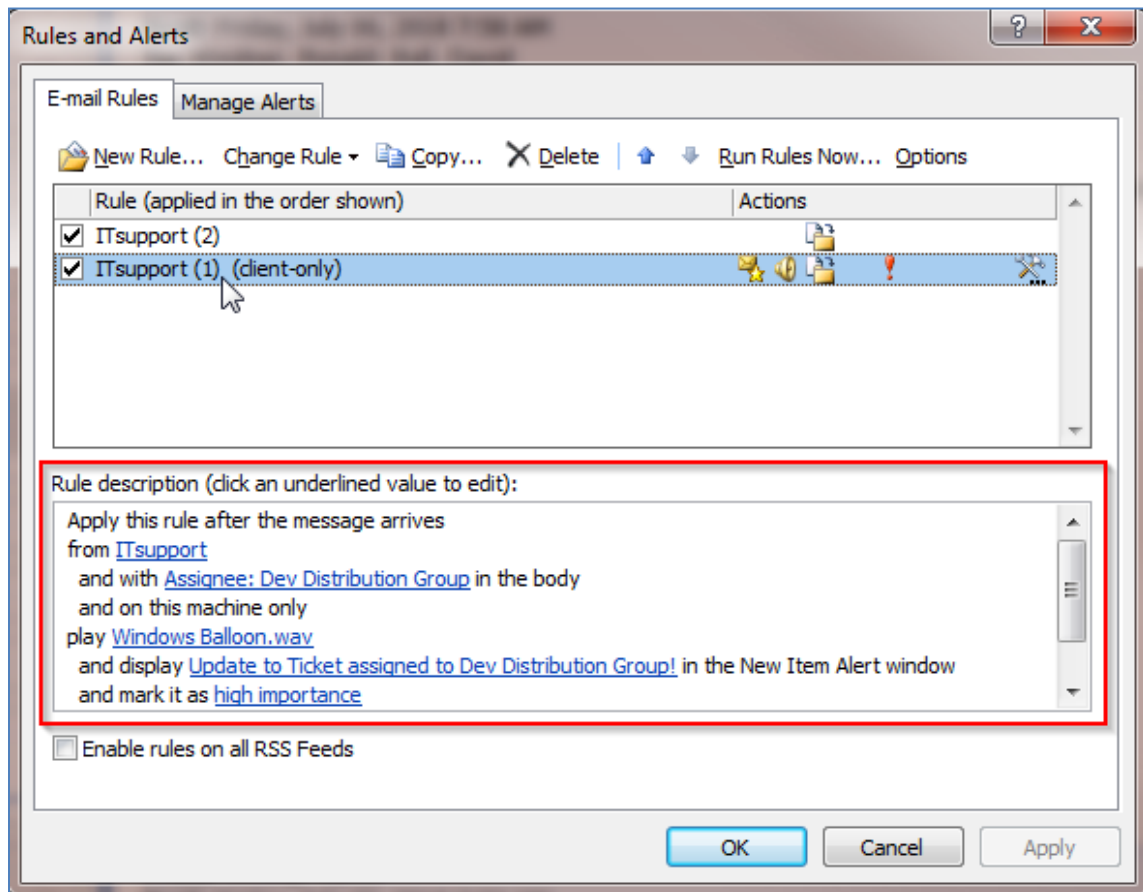Here is the rule the Triage Specialist should create in their Outlook program (Figure 8):

Figure 8: Outlook email rule

Also, the Triage Specialist should have their name added to the Outlook distribution list called *Dev* (Figure 9).
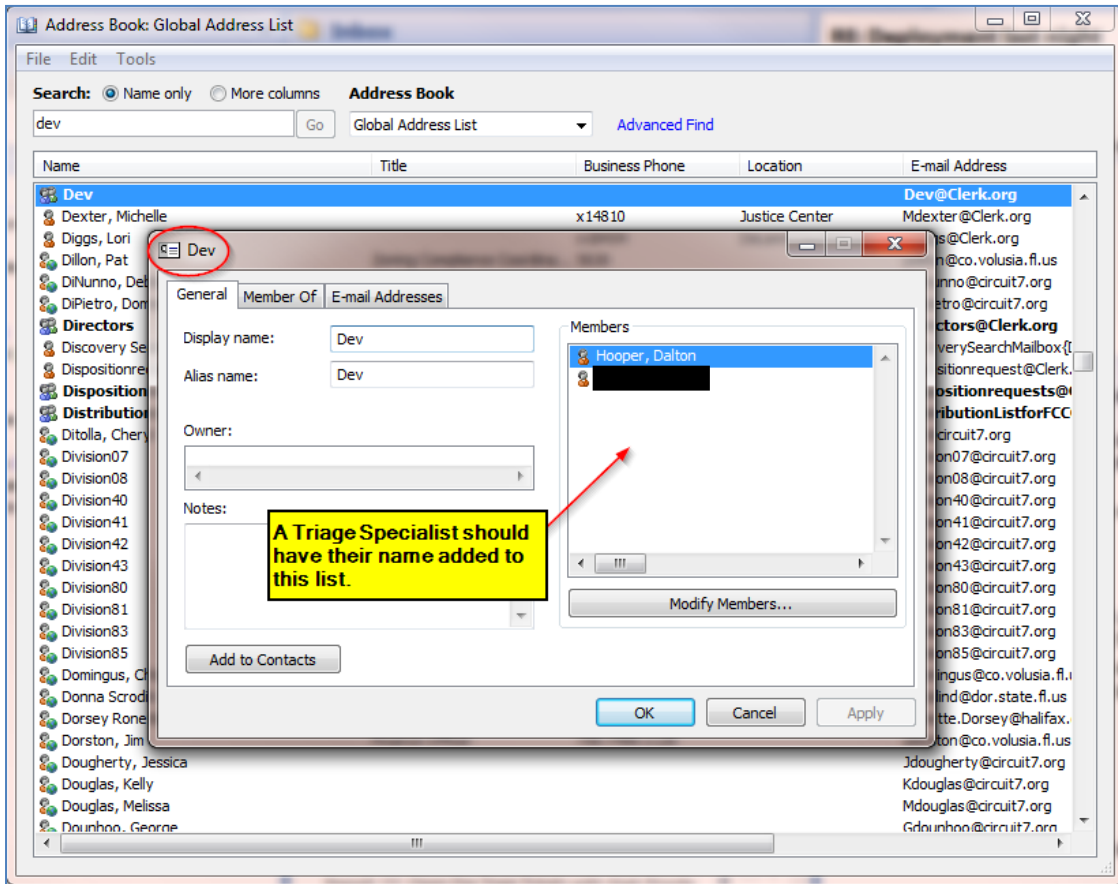
Triage Document templates

CCMS triage document template

The template for triage documentation for a ticket involving the CCMS app can be found here:
\\███
███████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> \\█████████████████████████████████
> ███████████████████████████.docx*

Case Management triage document template

\\███
███████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> \\███████████████████████████████
> █████████.docx*

OR triage document template

██
██████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> \\███████████████████████████████
> ████████████████████████████.docx*

Web triage document template

\\██
███████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> \\████████████████████████████████
> ██████████████████████.docx*

Document Review triage document template

\\ ██
████████████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> \\ ██
> ████████████████████████████████.docx*

Reports triage document template

\\ ██
████████████████████████████████.dotx

> *NOTE: For an example of a completed CCMS app triage document using this template, see*
> \\ ██
> ████████████████████████████████.docx*

Triage *Internal Note* templates

The Triage Specialist should insert one of the following two templates into the ticket as an *Internal Note* (copy and paste the most appropriate one, replacing any verbiage found between brackets ([])):

Internal Note template 1 - Triage document created

If triage was performed and a triage document was created, copy and paste this verbiage to create an *Internal Note* in the ticket (also, attach the triage document you created):

[mm/dd]/2018: Triage by [Triage Specialist's name here]:

Description of the issue:

(See the attached triage Word document for screenshots and navigation.) [Describe the issue being reported in this ticket].

Specifically, what is this ticket calling for?:

[Briefly state what action this ticket is calling for]

Note to programmer:

If deeper triage is needed or there are questions about the current triage, please contact [Triage Specialist's name here] ([yourusername]@clerk.org) x[phone extension].

Figure 10: *Internal Note* template 1 - Triage document attached

Volusia County Clerk of Court

Internal Note template 2 - General

If template 1 is not appropriate, copy and paste the verbiage below to create an *Internal Note* in the ticket:

[*mm/dd*]/2018: Triage by [*Triage Specialist's name here*]:

Description of the issue:

[*Describe the issue being reported in this ticket*].

Specifically, what is this ticket calling for?:

[*Briefly state what action this ticket is calling for*]

Note to programmer:

If deeper triage is needed, please contact [*Triage Specialist's name here*] ([*yourusername*]@clerk.org) x[*phone extension*].

Figure 11: *Internal Note* **template 2 - General**

Frequently Asked Questions

What if I determine the ticket actually should have been assigned to OPs rather than Dev?

From time to time, during the course of triage by the Triage Specialist, a ticket that initially appeared to the IT Support Analyst (who routed the ticket) as requiring the Dev Team to satisfy, will be found to actually require the Operations Team instead (e.g., a ticket that appeared to require a software solution is determined to require a hardware solution instead).

In these cases, the Triage Specialist should contact the IT Support person who originally routed the ticket and advise them you will be reassigning the ticket back to them and why.

What if I believe the ticket creator provided enough information and further triage is not necessary?

Although this theoretically could happen, it is very unlikely that a ticket would initially be created containing so much triage information that the Triage Specialist could find nothing to add. If this is truly the case, then, at a minimum, re-word the information already contained in the ticket to address the following two areas:

1. Summarize the issue that is driving the requested action

2. State what the ticket is specifically requesting to be done

> *NOTE: If, ultimately, you are convinced the ticket initially contains all the necessary triage information and you can add no value to it, then confirm that fact with the IT Dev Manager **before** re-assigning the ticket to a developer or Dev Distribution Group.*

What if I determine the request being made on the ticket is actually an enhancement and not a BAU or Break-Fix?

Requests by users for enhancements are subject to a separate process. As of mid-2017, **all** requests for enhancements are required to be approved by the Portfolio Board **prior** to a ticket being created. Ideally, a Triage Specialist should never receive a ticket that is requesting an enhancement, as its creation and subsequent routing should have been handled by the Portfolio Board Chairperson and the Business Analyst(s).

If the Triage Specialist determines that a ticket was inadvertently created which actually represents an enhancement request rather than a BAU or B/F, then this should be brought to the attention of the IT Dev Manager for concurrence and rerouting to the Portfolio Board Chairperson.