


Bulk add or modify work items with Excel

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Azure Boards | Azure DevOps Server 2019 | TFS 2018 | TFS 2017 | TFS 2015 | TFS 2013

When you have a lot of work items to add or modify, using Microsoft Excel can save you time. [Use a flat list](#) to bulk add or modify several types of work items at once, such as backlog items, tasks, bugs, or issues. [Use a tree list](#) to bulk add or modify work items and their parent-child links.

You can also bulk add and modify work items using [Microsoft Project](#).

In this article you'll learn:

- ✓ Connect to a project from Excel
- ✓ Add or edit work items and publish your changes to Azure Boards or TFS
- ✓ Refresh your Excel worksheet with the latest changes made to the work tracking data store
- ✓ Select user accounts
- ✓ Add hierarchically linked backlog items and tasks
- ✓ Work with different list types

Prerequisites

- Microsoft Excel 2010 or later version, including Microsoft Office Excel 365
- Visual Studio 2013 or later version or [Team Foundation Server Standalone Office Integration \(free\)](#)
- [Permissions to connect to the project](#) in Azure Boards or TFS.

To learn more about compatibility requirements, see [Compatibility with Azure DevOps](#).

Add work items

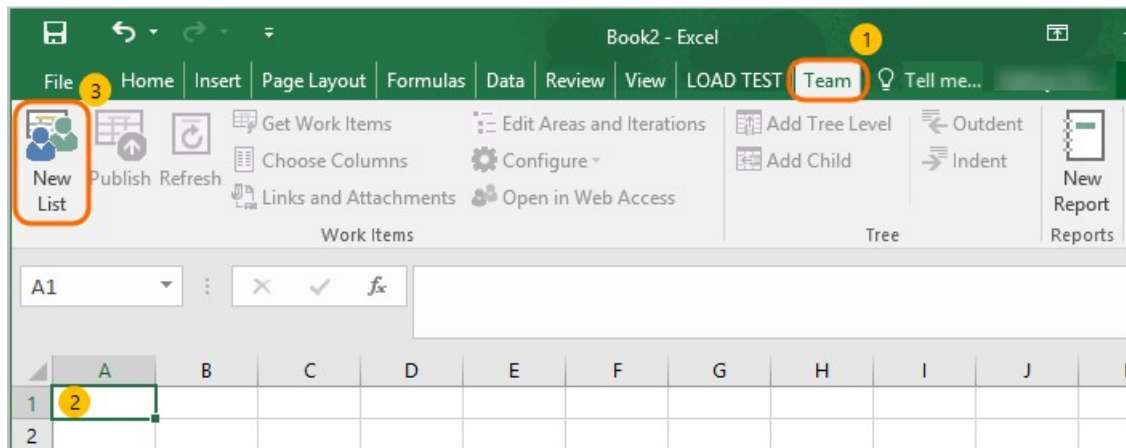
1. If you don't have Microsoft Excel 2007 or a more recent version, [install it](#). For Azure Boards and TFS 2017 and later versions, you'll need Excel 2010 or a later version.
2. If you haven't installed a version of [Visual Studio \(2010 or later\)](#) or the [Team Foundation Server Standalone Office Integration \(free\)](#), you'll need to install one of these versions to connect to an Azure DevOps or TFS project.

 **Observação**

The only way to get the Team Foundation plug-in is by installing one of the latest editions of Visual Studio or the TFS Standalone Office Integration installer. The TFS Office Integration supports connection to Azure Boards and TFS from Excel, Project, and the PowerPoint-based storyboarding tool.

3. In Excel, start with a blank worksheet. If you don't see the **Team** ribbon (or the **Team** menu if you use Excel 2007), see step 2 or [TFS-Office integration issues](#).

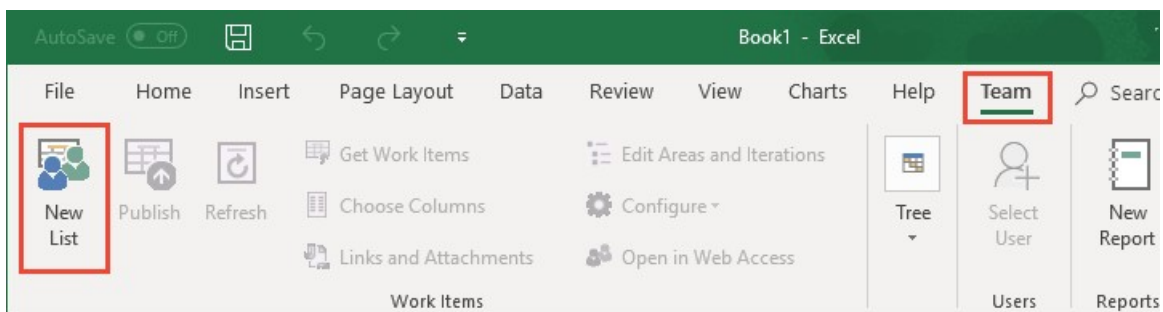
(1) Choose Team tab, (2) place your cursor in Cell A1, and then (3) choose **New List**.



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If the **Team** ribbon no longer appears, you might need to [re-enable it](#).

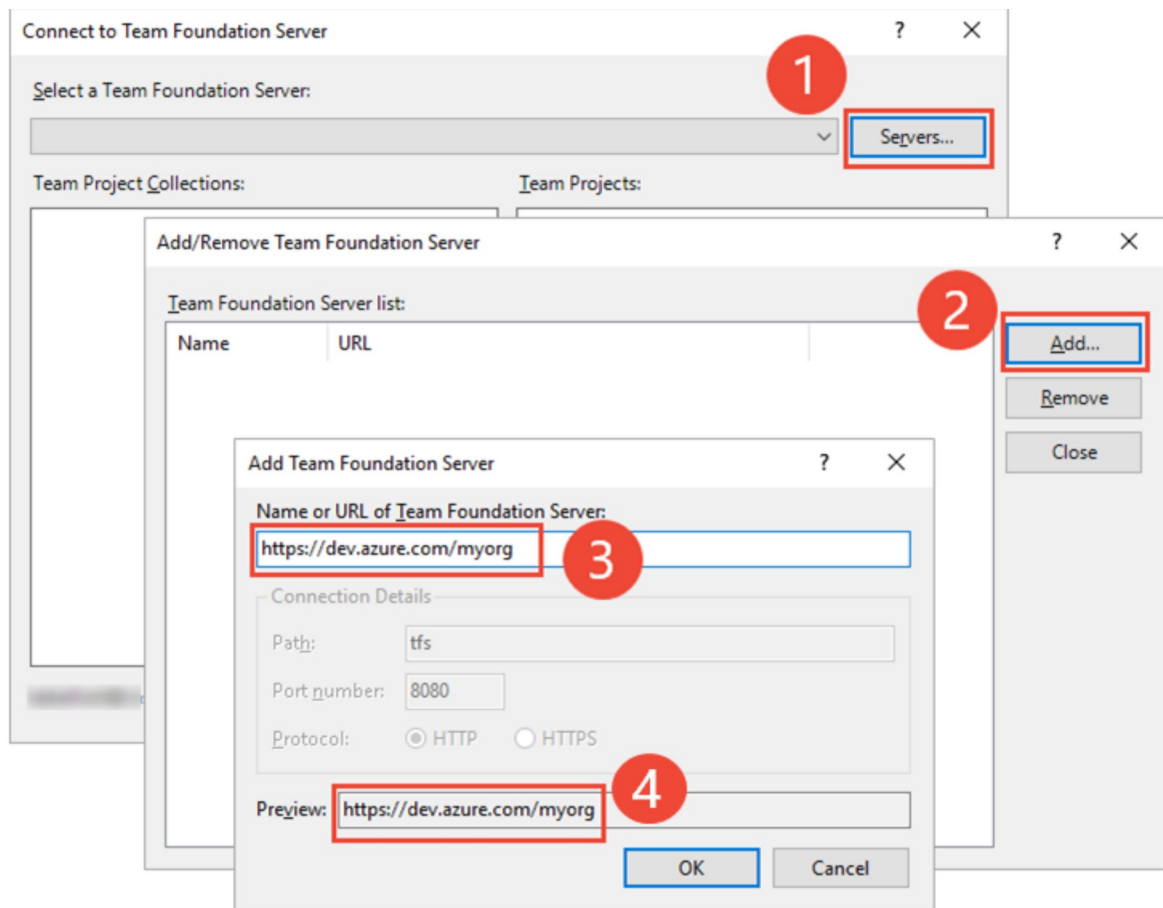
4. Connect to your project where you want to add work items. If you can't connect, [get added as a team member](#).



If it is your first time connecting from Excel, you might have to add the URL to the list of recognized servers.

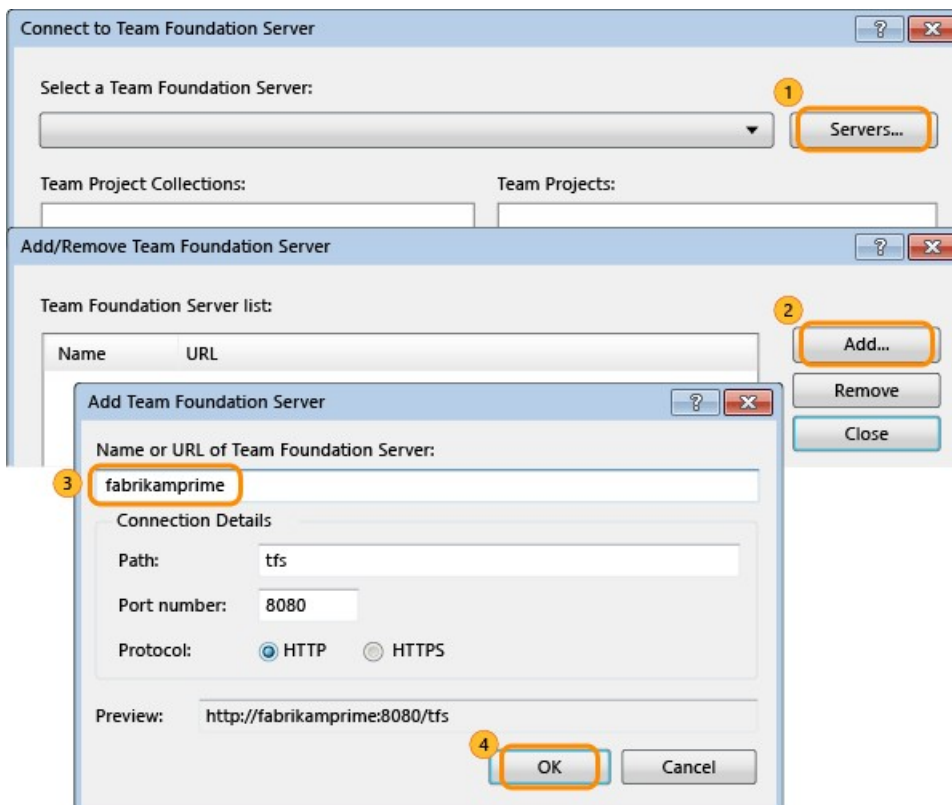
Azure Boards

(1) Choose **Servers...**, (2) choose **Add...**, (3) enter the URL of your Azure Boards organization, (4) check that the preview matches the URL that you entered, and then choose **OK**.



TFS

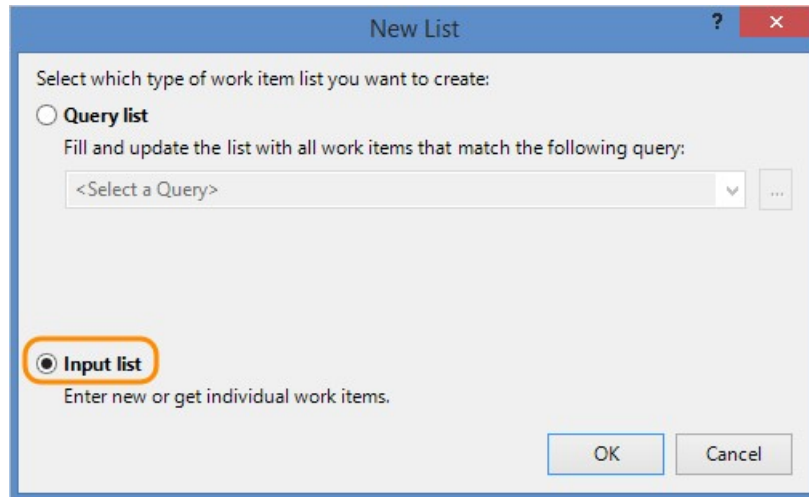
(1) Choose **Servers...**, (2) choose **Add...**, (3) enter the name of your TFS instance. As needed, change the Port number if your deployment uses a non-default port number. The Preview entry should display the correct URL for your deployment. (4) Choose **OK**.



Choose **Close** to close the Add/Remove servers dialog. From the Select a Team Foundation Server

dialog, make sure the server you added is selected, and then choose **Connect**.

- From the New List dialog, choose **Input list**.



- Your worksheet is now bound to your project as a flat list. What this means is that you can add work items to the project from the worksheet or add work items to the worksheet from the project.

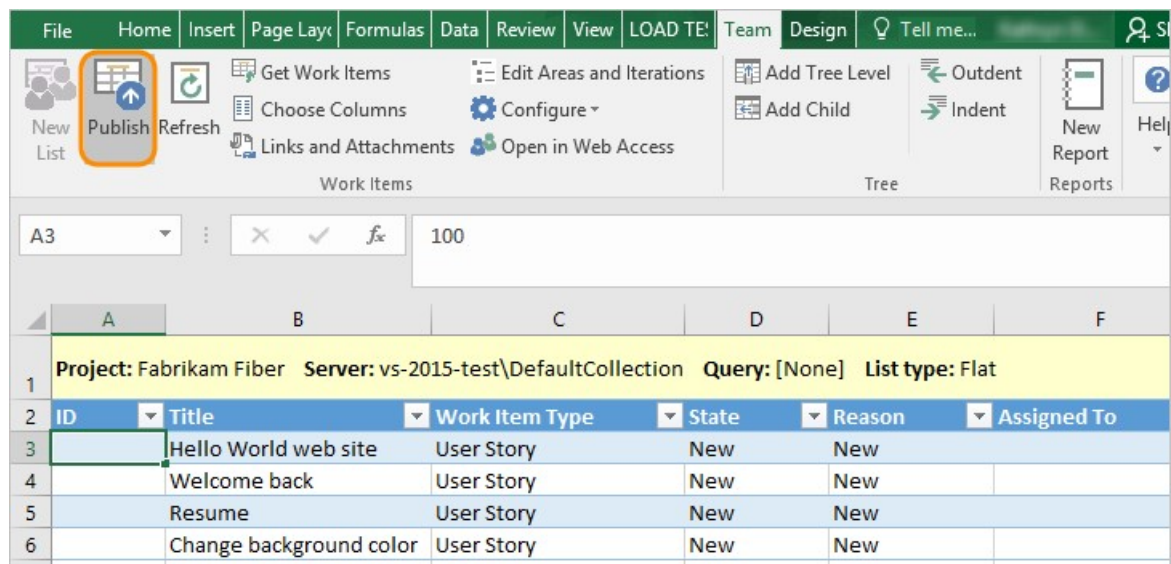
	A	B	C	D	E	F	G
1	Project: Fabrikam Fiber Server: vs-2015-test\DefaultCollection Query: [None] List type: Flat						
2	ID	Title	Work Item Type	State	Reason	Assigned To	
3							
4							

- Specify the titles of the work items you want to add and their work item type.

	A	B	C	D	E	F
1	Project: Fabrikam Fiber Server: vs-2015-test\DefaultCollection Query: [None] List type: Flat					
2	ID	Title	Work Item Type	State	Reason	Assigned To
3		Hello World web site	User Story	New	New	
4		Welcome back	User Story	New	New	
5		Resume	User Story	New	New	
6		Change background color	User Story	New	New	

Notice how the **State** and **Reason** fields automatically fill in with default values once you select the work item type.

- Publish your worksheet.

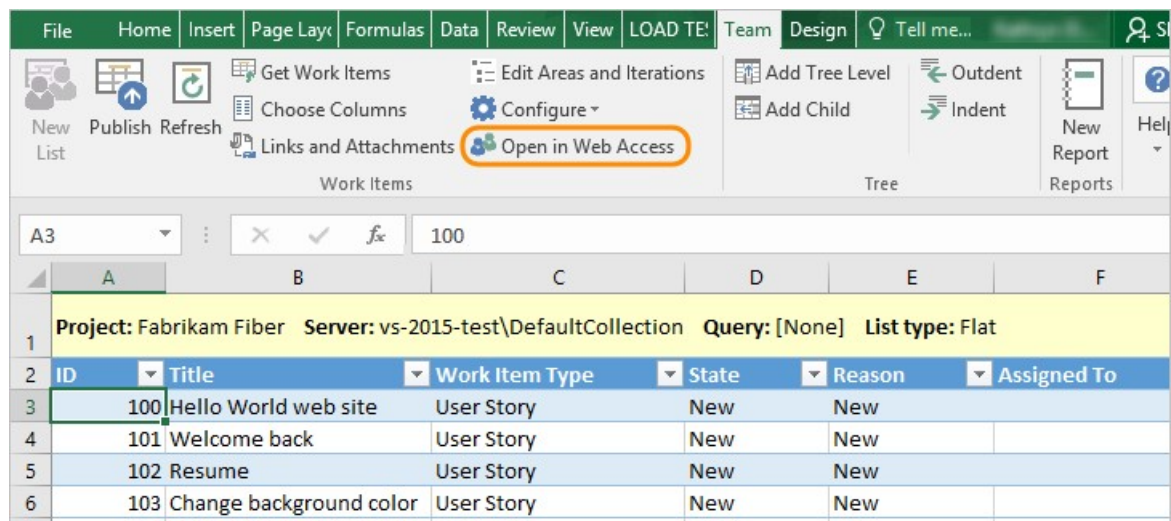


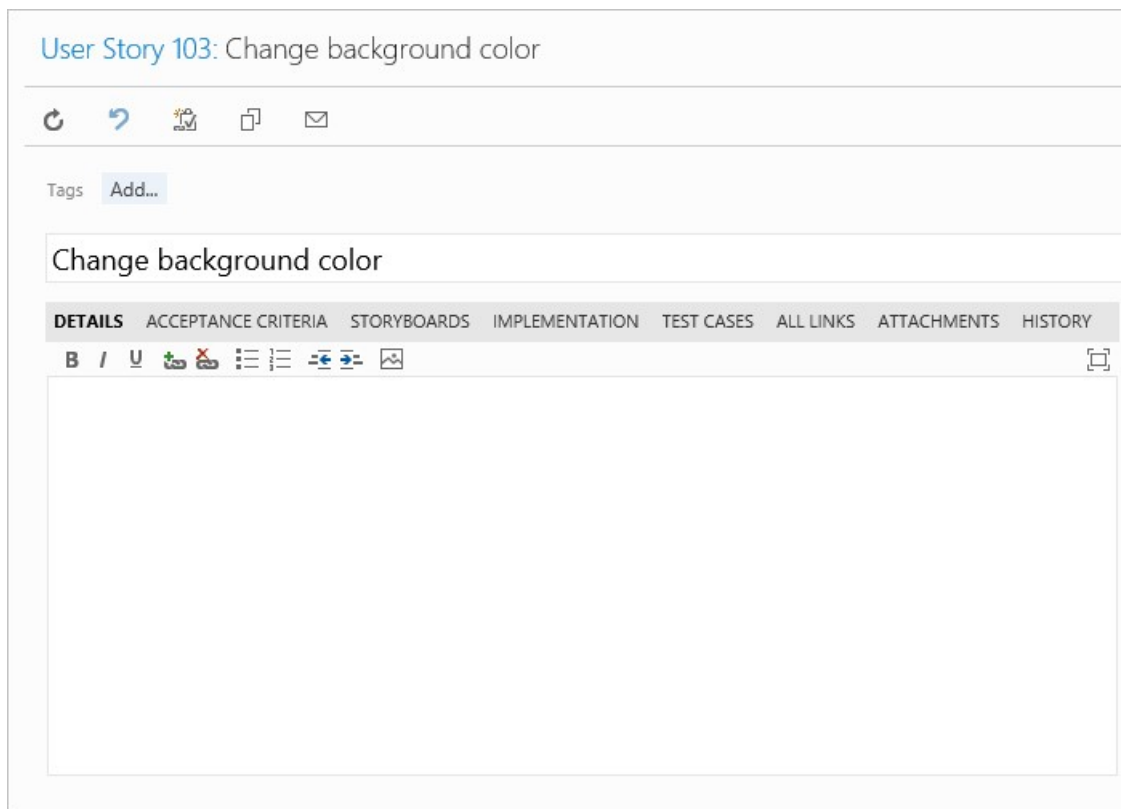
Make sure your cursor is in a cell that contains data. Otherwise, the **Publish** button might appear disabled.

Notice how IDs are now assigned to your work items.

	A	B	C	D	E	F
1	Project: Fabrikam Fiber Server: vs-2015-test\DefaultCollection Query: [None] List type: Flat					
2	ID	Title	Work Item Type	State	Reason	Assigned To
3	100	Hello World web site	User Story	New	New	
4	101	Welcome back	User Story	New	New	
5	102	Resume	User Story	New	New	
6	103	Change background color	User Story	New	New	

9. Also, note how you can open a work item in the web portal to add more information.







You can make changes to work items in Excel, Project, the web portal, or Visual Studio, or Team Explorer Everywhere.

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Follow these tips to keep your work in sync:

- When you first open a saved worksheet, use  (**Refresh**) to download the latest data from the data store.
- Enter data for additional fields by adding columns to the worksheet using  **Choose Columns**.
- To avoid data conflicts, publish your additions and modifications often.
- To prevent loss of data before you publish or refresh, save your workbook periodically.

Select user accounts

Observação

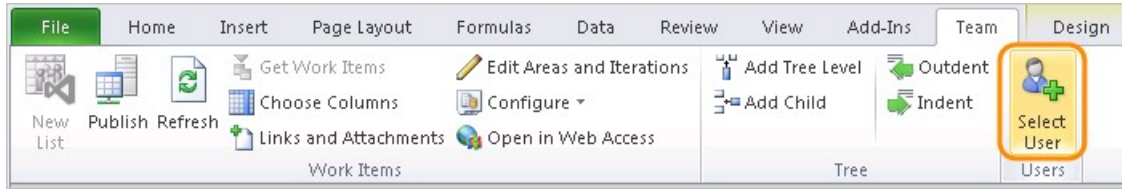
To access the [Select User](#) feature, you need to install [Visual Studio \(at least VS 2015.1 or later version\)](#) or [Team Foundation Server Office Integration 2015 Update 2 or later version](#). You can download the free version of Visual Studio Community. Get this feature to avoid data validation errors by misspelling user names and when you must assign user names from a large group of user accounts.

You can use the Select User feature to find user accounts and assign values to person named fields. Also, this feature provides access to the most recently used (MRU) values. If your team contains several hundreds or thousands of user accounts, you'll want to use this feature.

1. If you haven't installed or updated to the latest version of [Visual Studio \(at least VS 2015.1 or later](#)

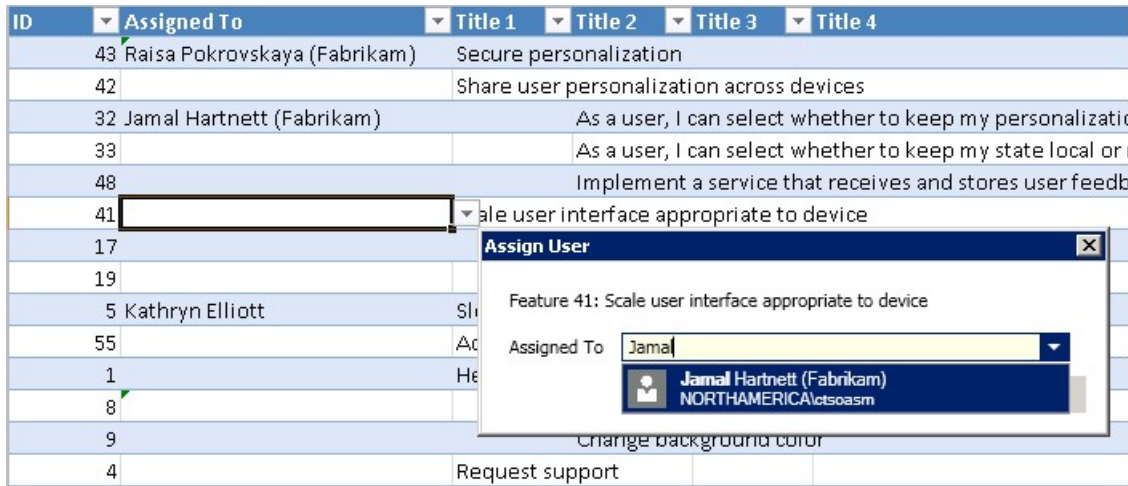
[version](#), do that now. You need the latest update in order to access the Select User feature.

- Click a person-named field to activate the Select User feature in the team ribbon.



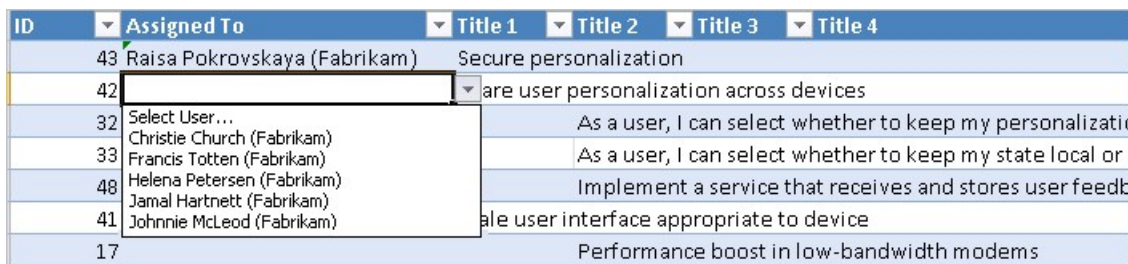
A person-named field is any field whose `syncnamechanges` attribute has been set to [synchronize with Active Directory, Azure Active Directory, or a Workgroup](#).

- Begin typing the name of the user account and the Assign User dialog will automatically filter the results until you can select the account of interest.



Enter a letter to tab to the start of names beginning with that letter. Enter only user names as account aliases aren't recognized.

You'll notice that as you select user names, Excel remembers your recent selections and you can select those user accounts directly from the field.



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Without the Select User feature active, you must enter user names exactly as they are in the database, or you'll receive data validation errors upon trying to publish.

Add linked backlog items and tasks

You can bulk add a nested list of work items, such as a work break down structure or a hierarchical set of user stories and customer experiences. For example, you can add a nested list of tasks, subtasks, and bugs, as

shown in the following illustration, or linked tasks to product backlog items, as described in the following steps.

Here's how a three-level nested tree of items appears in Excel:

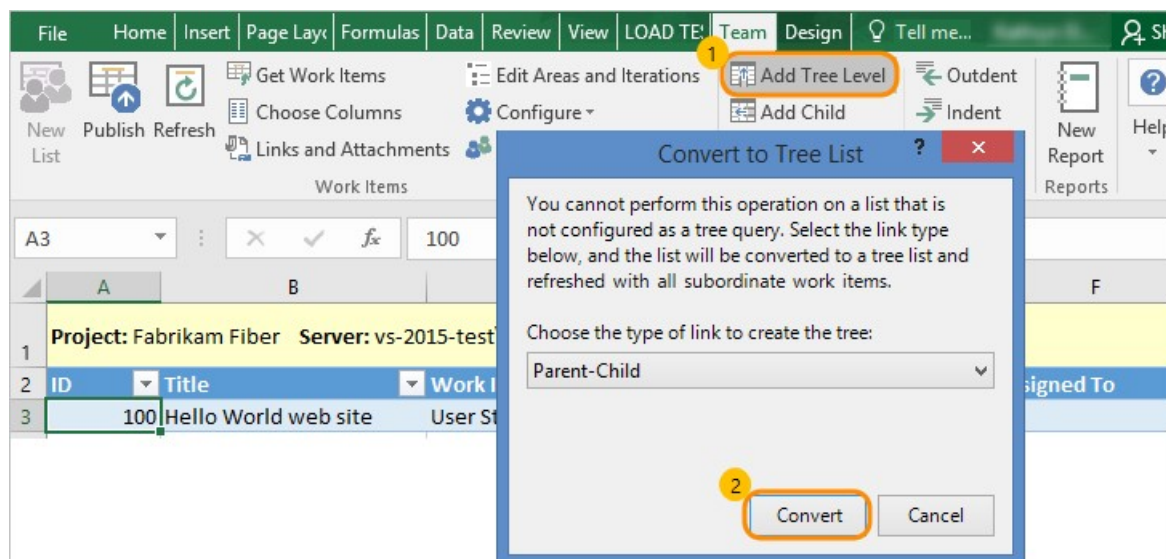
Additional Title columns define the subordinate work items.

A	B	C	D	E
Project: Team0625	Server: ServerName.8080	Query: WorkBreakdown	List type: Tree	
ID	Title 1	Title 2	Title 3	Links & Attachments
622	Task 1			No
623	Task 2			Yes
626		Sub-task A		Yes
627		Sub-task B		Yes
631			Bug 1	Yes
633			Bug 2	Yes
634			Bug 3	Yes
624	Task 3			Yes
632		Sub-task C		Yes
635		Sub-task D		Yes

Sub-tasks A and B are child work items of Task 2.

Bugs 1, 2, and 3 are child work items of Sub-task B.

1. Follow steps 1 through 6 from the previous procedure.
2. Convert your flat list to a tree list by adding a tree level.



Notice how the list type is now labeled **Tree**, and an additional **Title 2** column has been inserted.

A	B	C	D	E	F
Project: Fabrikam Fiber	Server: vs-2015-test	Query: [None]	List type: Tree		
ID	Title 1	Title 2	Work Item Type	State	Reason
100	Hello World	web site	User Story	New	New
101	Welcome back		User Story	New	New
102	Resume		User Story	New	New
103	Change background color		User Story	New	New

3. Enter titles for backlog items under **Title 1** and for tasks, under **Title 2**. Also, select the corresponding work item type for each. Here we specify Task.



	A	B	C	D	E	F
1	Project: Fabrikam Fiber Server: vs-2015-test\DefaultCollection Query: [None] List type: Tree					
2	ID	Title 1	Title 2	Work Item Type	State	Reason
3	100	Hello World	web site	User Story	New	New
4			Change background color	Task	New	New
5			Change page layout	Task	New	New
6			Develop about page	Task	New	New
7	101	Welcome back		User Story	New	New
8			Add welcome back text	Task	New	New
9			Display user's name in header	Task	New	New

4. Just as before, publish your worksheet and notice how IDs are assigned to the new work items.

	A	B	C	D	E	F
1	Project: Fabrikam Fiber Server: vs-2015-test\DefaultCollection Query: [None] List type: Tree					
2	ID	Title 1	Title 2	Work Item Type	State	Reason
3	100	Hello World	web site	User Story	New	New
4	104		Change background color	Task	New	New
5	105		Change page layout	Task	New	New
6	106		Develop about page	Task	New	New
7	101	Welcome back		User Story	New	New
8	107		Add welcome back text	Task	New	New
9	108		Display user's name in header	Task	New	New
10	102	Resume		User Story	New	New

In the background, parent-child links are created for each task listed under a user story.

Useful tips when working with a tree list

- The plug-in interprets the data in the **Title** columns to determine the pattern of links between work items. When you publish changes, any of the following conditions can result in an error, an invalid link, or a tree link to be created between incorrect work items:
 - A row between parent and child work items is blank.
 - The Title of a work item is in the wrong column. Make sure you enter a title for each child work item.
 - Within a row, multiple **Title** columns contain data. Enter text in only one of the title columns within each row.
 - The list was sorted. Don't sort a tree list. Sorting a tree list can change the hierarchical link relationships. If you do sort a tree list, you can recover from this operation by immediately refreshing.
- To resolve an error, see [Resolve invalid links in an Excel tree list](#).
- You can use the  Indent or  Outdent indent/outdent icons to demote or promote a work item within the tree hierarchy. Verify that the column to the left or right of the parent work item's title is a **Title** column. The header at the top of the column should read **Title <number>**, if it does not, add a tree level.
- A parent-child linked work item can only have one parent. You can't add the same work item task to two backlog items. Instead, you need to define distinct work item tasks.
- If you receive error TF208104, changes you made to the fields are published, but all changes you made to the link hierarchy are not published. At least one of the link relationships defined for the work item is locked by another process, such as Project Server integration. For more information, see [Addressing Error TF208104: Hierarchical Link Relationship Is Locked](#).
- When you move a work item, make sure that you select the entire table row.

Work with different list types

Select your list structure based on these guidelines.

Task	List structure	List refresh
Create and publish many unrelated work items	Flat list	Input list
Perform bulk edits on many unrelated work items	Flat list	Query list or input list
Perform bulk edits on many work items and their dependent or related work items	Tree list	Query list
Perform top down planning and publish parent-child linked work items	Tree list	Input list
View and modify the hierarchy and parent-child link relationships of many work items	Tree list	Query list
Review reports based on a filtered set of work items that change over time	Flat or tree list	Query list

Enable the Tree commands

If the Tree group commands are not available, your worksheet is configured as a flat list. You can convert the flat list to a tree list as described in step 2 in [Add backlog items and tasks and their parent-child links using a tree list](#).

Convert a tree to a flat list

First, publish whatever changes you have made. Then, on the **Team** ribbon, choose **Configure, List**, and then choose **Refresh work items only**. This will flatten the tree structure and change the query list to an input list.

Remove a tree level

Remove any content entered under the tree-level **Title number** column you want to remove—the highest numbered column—and, then **Refresh** your worksheet.


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Always publish changes that you have made to work items before you remove a tree level. Removing a tree level requires a refresh, which overwrites data in the work item list. You will lose any data you have not published.

Convert from an input list to a query

On the **Team** ribbon, choose **Configure, List**, and then select the query you want to use. The worksheet will refresh with only those work items returned by the query. Also, if you select a tree query, then the list becomes a tree list.

Add existing work items to a list

If you're working with a non-query input list, you can add work items by choosing  from the **Team** ribbon. If you're working from a query, then you need to [modify your query](#) to contain the work items you want. Then refresh your list.

Bulk edit test cases

You can't use Excel to export and import test case steps or other test artifacts. Instead, use the [grid view to bulk edit test cases supported via the web portal](#).

Related articles

While the examples shown here represent connecting to an on-premises TFS, you can connect to Azure Boards and bulk add and modify work items. Once you've connected to the cloud server, you use the same procedures to work in Excel.

- [Bulk modify work items \(web portal\)](#)
- [Basic Excel tasks](#)

To bulk edit links, you can use these clients:

- Use Excel to edit parent-child or hierarchical links.
- Use [Project](#) to edit parent-child and predecessor-successor link relationships.
- Use the web portal, to [map backlog items to portfolio backlog items](#) which creates parent-child links.
- Use either the web portal or Team Explorer, to modify parent-child links by [dragging items within a hierarchical backlog page](#) or within a tree query.

To resolve publishing errors, see one of these topics:

- [Data conflicts](#)
- [Data validation errors](#)
- [Invalid links](#)

Delete work items

You can't delete work items from Excel. The only way to delete work items is from the web portal or the `witadmin` command line tool. For details, see [Move, change, or delete work items](#).

Direct link query converts to flat list

When you open a direct links query in Excel, the Team Foundation add-in converts the list to a flat list. While you can modify values for the fields and add work items, you can't view nor modify link relationships.

Multiple worksheets


Each worksheet in Excel can contain a different input list or query. However, all worksheets within the workbook must connect to the same project within a project collection.

To bulk add or modify work items in a different project, open a new Excel workbook.

Use Excel cut and paste functions

You can use many Excel features, such as cut, paste, automatic fill, format, sort (flat list only), filter, and add formulas. You can cut and paste rows to re-sequence items within a list and change link relationships among work items.

To drag a work item, select the work item or contiguous set of work items that you want to move, open the

context menu and choose **Select, Table Row**, point to the border of the selection, and—when the pointer becomes a move pointer —drag the row to another location.

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When you refresh the work item list, not all formats may be retained. For example, date formats are set by the server data store. Any changes you make to a date format field will be overwritten with the date format used by the server.

Web portal and Excel access

To open Excel from a web portal query, install the [VSTS Open in Excel](#) marketplace extension.

To use Excel, you must get the Team Foundation add-in, which installs when you install Visual Studio or Team Explorer. If you don't have one of these versions installed, [install it now](#). You can install Visual Studio Community for free.

Once you've installed Visual Studio, open Excel and look for the Team ribbon.

Disable the Team Foundation Add-in

If you want to disable the add-in, see [Add or remove an add-in](#).

Enable the Developer tab

See [Show the Developer Tab on the Ribbon](#).

Excel for Mac

macOS is not supported. You need to use Excel on the same computer where you have installed Visual Studio or Team Explorer in order to get the Team Foundation add-in. These applications require Windows.