


Track issues, tasks, and epics

10/01/2019 • 7 minutos para ler • Colaboradores 

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Azure Boards

This article walks you through creating issues and tasks using a Kanban board for the Basic process.

Importante

Select the version that meets your location and process: We are experimenting with a new acquisition model which is currently available for users located in the United States and that sign up through azure.com/boards. This model supports a new Basic process.

For International users and others who sign up through another method, the Agile process is used. Select your version of this article based on your location and process used.

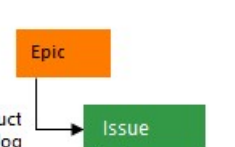
- [Basic process](#)
- [Agile process](#)

Your first project uses the Basic process which provides three work item types—epics, issues, and tasks—to plan and track work. We recommend you start by adding issues to track your user stories, bugs, or feature items. If you need to group them into a hierarchy, you can define epics. If you want to track additional details of work, you can add tasks to an issue.

Work item types

Backlog hierarchy

Work item types



```

graph TD
    PB[Portfolio backlog] --> P[Product backlog]
    P --> E[Epic]
    E --> I[Issue]
    I --> T[Task]
  
```

Backlog hierarchy

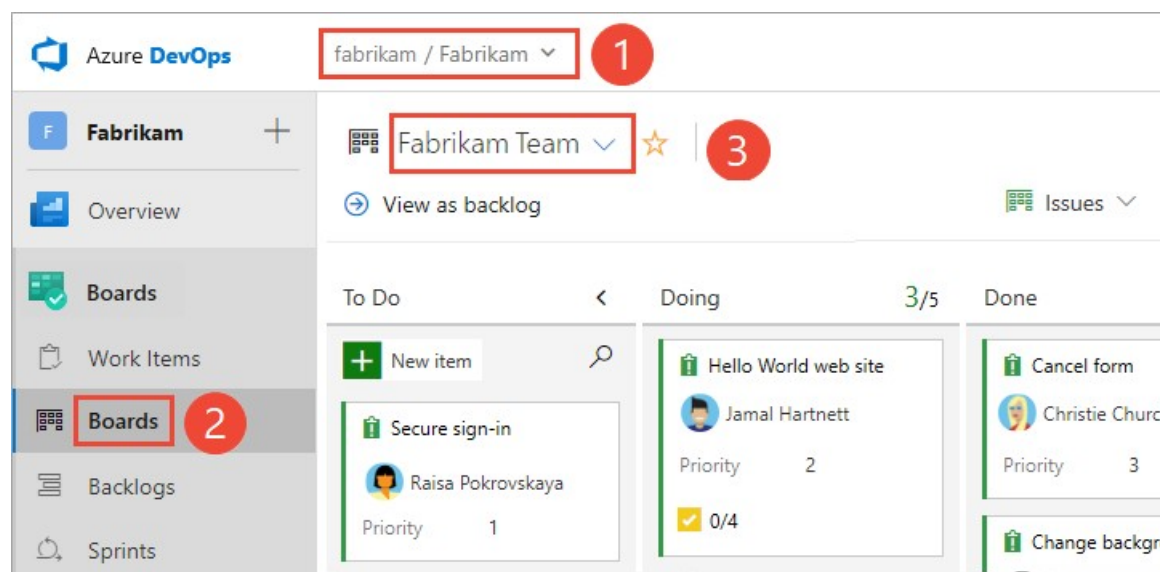
Order	ID	State	Title
+	60	To Do	Web site updates
	63	Doing	Secure sign-in
	67	Doing	Hello World web site
	69	To Do	Design welcome screen
	71	To Do	Standardize form factors
	70	To Do	Change background color
	72	To Do	About screen
	62	To Do	Welcome back page
	59	To Do	Change initial view
	73	To Do	Service status
	66	Doing	Resolve service status issues
	64	Doing	Check performance
	73	To Do	Change new item

Within each work item form, you can describe the work to be done, assign work to project contributors, track status, and collaborate with others through the Discussion section.

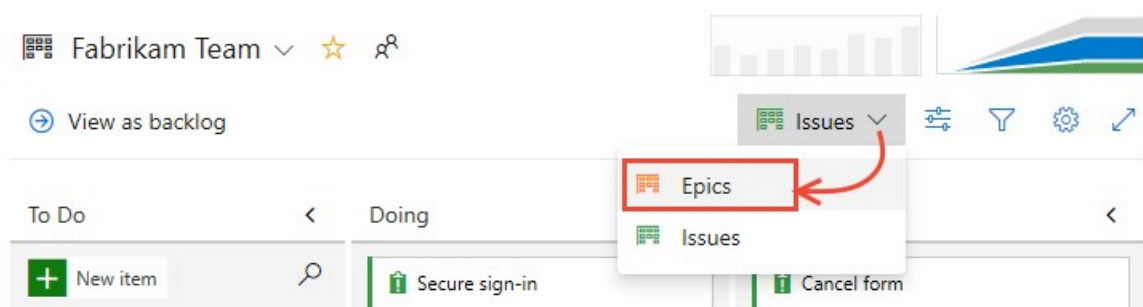
Here we show how to add issues and child tasks from the web portal and add details to those work items .

Open the Issues board

The Issues Kanban board is the best tool for quickly adding issues and child tasks. To open, choose **Boards>Boards**.

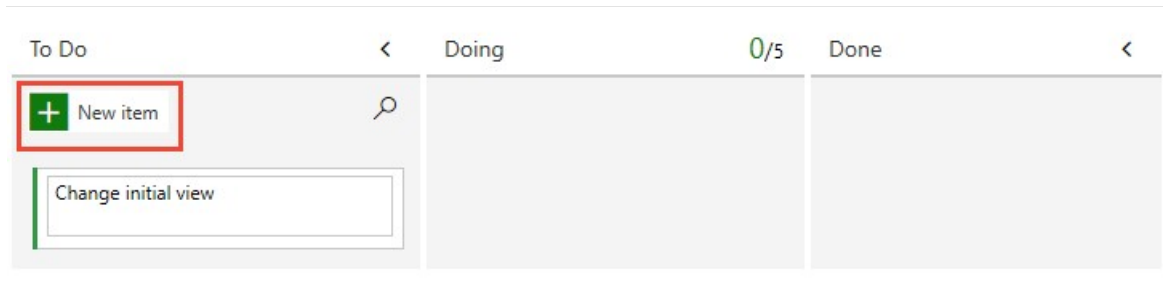


The Epics Kanban board is the best tool for quickly adding epics and issues that are children of those epics. To open the Epics board from the Issues board, choose **Epics** from the board selector.

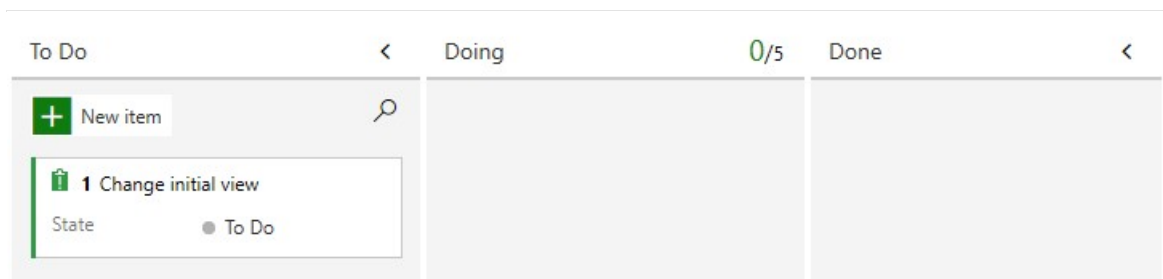


Add issues

1. From the Issues board, choose **New item** and start adding those issues you want to track.



2. Enter return and the system assigns a work item ID to the issue.



3. To track the work you want to manage, add as many issues that you need.

Add details to an issue

1. Choose the issue title to open it. Change one or more field values, add a description, or make a note in the **Discussion** section. You can also choose the **Attachments** tab and drag-and-drop a file to share the file with others.

For example, here we assign the issue to Raisa Pokrovskaya and we add a discussion note, mentioning Raisa.

ISSUE 1

1 Change initial view

Raisa Pokrovskaya 0 comments Add tag Save & Close Follow Refresh Undo More

State To Do Area Fabrikam Updated just now

Reason To Do Iteration Fabrikam\Iteration 1

Details History Links Attachments

Description

Switch initial view to the updated design.

Discussion

@Raisa Pokrovskaya - Can you make this happen in the next week?

Planning

Priority 2

Effort

Development

+ Add link

Development hasn't started on this item.

Related Work

+ Add link

There are no links in this group.

📌 Observação

You can only assign work to a user who has been added to the project.

2. Choose **Save & Close** when done.

Field descriptions

Field	Definition
Title	Enter a description of 255 characters or less. You can always modify the title later.
Assigned To	Assign the work item to the team member responsible for performing the work. Depending on the context you are working in, the drop-down menu will list only team members or contributors to the project.
State	When the work item is created, the State defaults to the first state in the workflow. As work progresses, update it to reflect the current state.
Reason	Use the default first. Update it when you change state as need. Each State is associated with a default reason.
Area	Choose the area path associated with the product or team, or leave blank until assigned during a planning meeting. To change the dropdown list of areas, see Define area paths and assign to a team .
Iteration	Choose the sprint or iteration in which the work is to be completed, or leave it blank and assign it later during a planning meeting. To change the drop-down list of iterations, see Define iteration paths (aka sprints) and configure team iterations .
Description	Provide enough detail to create shared understanding of scope and support estimation efforts. Focus on the user, what they want to accomplish, and why. Don't describe how to develop the

product. Do provide sufficient details so that your team can write tasks and test cases to implement the item.

Priority

A subjective rating of the issue or task it relates to the business. You can specify the following values:

- 1: Product cannot ship without the successful resolution of the work item, and it should be addressed as soon as possible.
- 2: Product cannot ship without the successful resolution of the work item, but it does not need to be addressed immediately.
- 3: Resolution of the work item is optional based on resources, time, and risk.
- 4: Resolution of the work item is not required.

Effort

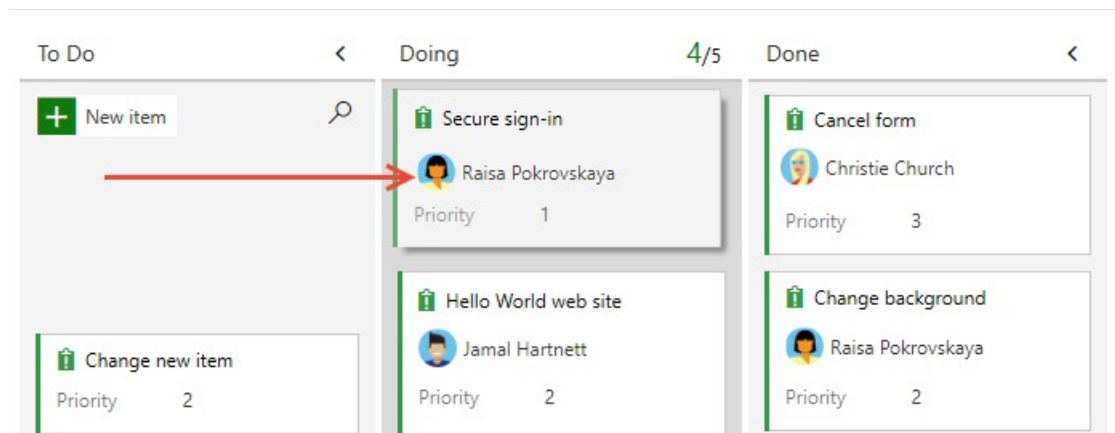
Provide a relative estimate of the amount of work required to complete an issue.

Most Agile methods recommend that you set estimates for backlog items based on relative size of work. Such methods include powers of 2 (1, 2, 4, 8) and the Fibonacci sequence (1, 2, 3, 5, 8, etc.). Use any numeric unit of measurement your team prefers.

The estimates you set for **Effort** are used to calculate [velocity](#) and [forecast sprints](#).

Update issue status

As work starts, drag the issue from the **To Do** column to the **Doing** column. Once completed, move to the **Done** column.

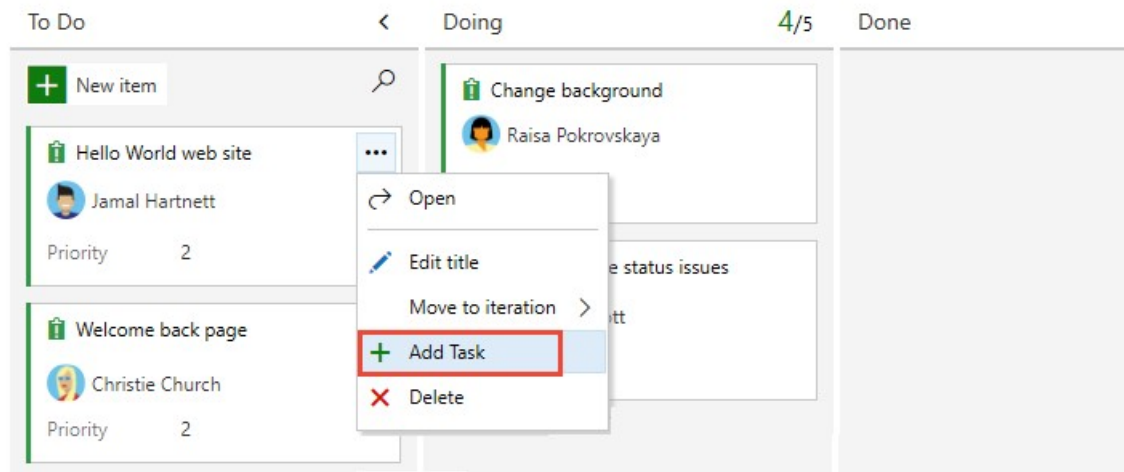


You can add or rename columns as needed, see [Customize your board](#).

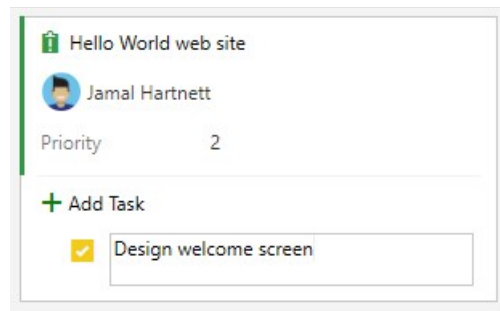
Add tasks to an issue

Task checklists provide a quick and easy way to track elements of work which are important to support completing an issue.

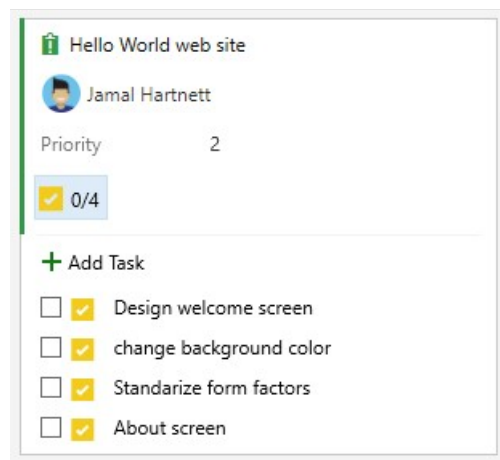
1. To start adding tasks, choose the **...** actions icon for the issue and select the **+ Add Task** option.



Enter a title for the task and type Enter when done.



2. If you have a number of tasks to add, simply keep typing your task titles and type Enter.



3. You can mark a task as done, expand or collapse the task checklist, or reorder and reparent tasks.

Mark a task as done

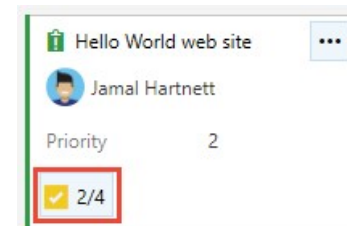
To mark a task as complete, check the task checkbox. The task State changes to **Done**.

Reorder and reparent tasks

To reorder a task, drag it within the checklist. To reparent a the task, dra g it to another issue on the board.

Expand or collapse the checklist

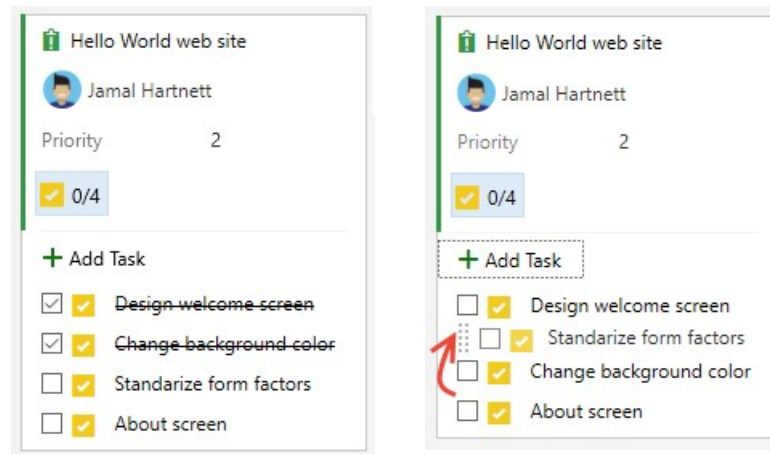
To expand or collapse a task checklist, simply choose the task annotation.



Mark a task as done

Reorder and reparent tasks

Expand or collapse the checklist



Add details to a task

1. If you have details you want to add about a task, choose the title, to open it. Change one or more field values, add a description, or make a note in the **Discussion** section.

Here we assign the task to Jamal.

9 Design welcome screen

Jamal Hartnett 0 comments Add tag Save & Close Follow Refresh Undo More

State **To Do** Area **Fabrikam** Updated 9 minutes ago

Reason Added to bac... Iteration **Fabrikam\Sprint 1**

Description

Click to add Description

Discussion

Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.

Planning

Priority 2

Activity

Remaining Work

Development

+ Add link

Development hasn't started on this item.

Related Work

+ Add link

Parent

7 Hello World web site Updated 29 minutes ago, To Do

Field descriptions

In addition to the fields you can define for an issue, you can specify the following fields for a task to support capacity and time tracking.


Field	Definition
Activity	<p>The type of activity that is required to perform a task. To learn more about how this field is used, see Capacity planning. Allowed values are:</p> <ul style="list-style-type: none"> • Deployment • Design • Development • Documentation • Requirements • Testing
Remaining Work	<p>The amount of work that remains to finish a task. You can specify work in hours or in days. There are no inherent time units associated with this field even though the taskboard always shows "h" for hours in relationship to Remaining Work.</p> <p>Remaining Work is also used to calculate burn down.</p>

2. Choose **Save & Close** when done.


Capture comments in the Discussion section

Use the **Discussion** section within a form to add and review comments about the work under development.


Discussion




Add a comment. Use # to link a work item, ! to link a pull request, or @ to mention a person.




Jamal Hartnett commented just now
@Christie Church - Assigning this to you



Christie Church commented less than a minute ago
 I've updated the storyboard per our discussions yesterday.



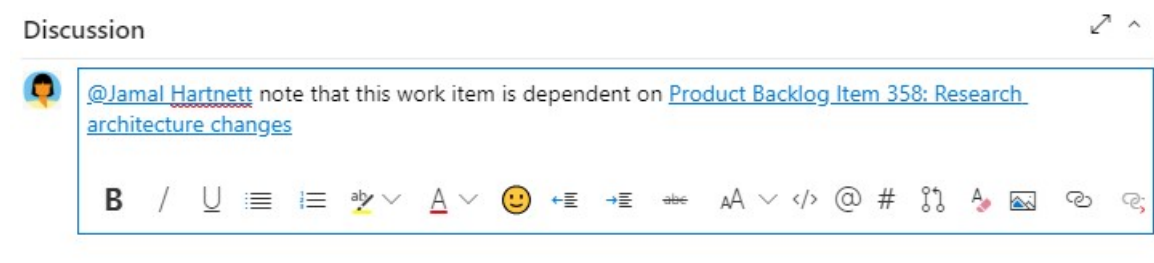
Helena Petersen commented 9 minutes ago
@Christie Church, @Jamal Hartnett - Let's do an A/B test on the colors used in the form.




Jamal Hartnett commented 21 hours ago
 Make sure the standards guidelines are written in a similar manner to those done for account setup.

Use the **@mention** control to notify another team member about the discussion. Simply type @ and their name. Or, bring a group into the discussion by typing @ and the group name, such as a team or security group. To reference another issue, task, or work item, use the **#ID** control. Type # and a list of work items that you've recently referenced will appear from which you can select.

The rich text editor tool bar displays below the text entry area when you click your cursor within the each text box that can be formatted.



Use the icons—@ at-mention, # #-work-item-ID, and  pull-request ID—to facilitate bringing others into the discussion or linking to work items or pull requests. Choose one of these icons and a menu displays with the most recent options that you've previously selected.

Try this next

Customize your board

Related articles

- [Index to field descriptions](#)
- [Add tags to issues or tasks](#)
- [Use @mentions in work items](#)
- [Use #ID to link to work items](#)