

Use templates to add and update work items

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Neste artigo

[Prerequisites](#)

[Capture a work item as a template](#)

[Add a work item using a template](#)

[Apply a template to existing work item\(s\)](#)

[Manage work item templates](#)

[Add or remove tags from templates](#)

[Define an ad hoc work item template using a hyperlink](#)

[Q & A](#)

[Related articles](#)

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

With work item templates you can quickly create work items which have pre-populated values for your team's commonly used fields. For example, you can create a task template that will set the area path, iteration path, and discipline or activity whenever you use it to create a task.

⚠ Observação

Work item templates are distinct from process templates. For information on process templates, see [Choose a process template](#) or these specific topics for the default process templates: [Basic](#), [Agile](#), [Scrum](#), or [CMMI](#).

For example usage of work item templates, see [Sample work item templates](#)

Prerequisites

- To add, capture, edit, or delete work item templates through the web portal, you must be a team administrator.
- To apply a team template, you must be a Contributor of the project and a member of the team under which the work item template is defined.

Capture a work item as a template

The steps to capture a work item differ based on the platform, version, and client you use.

Browser

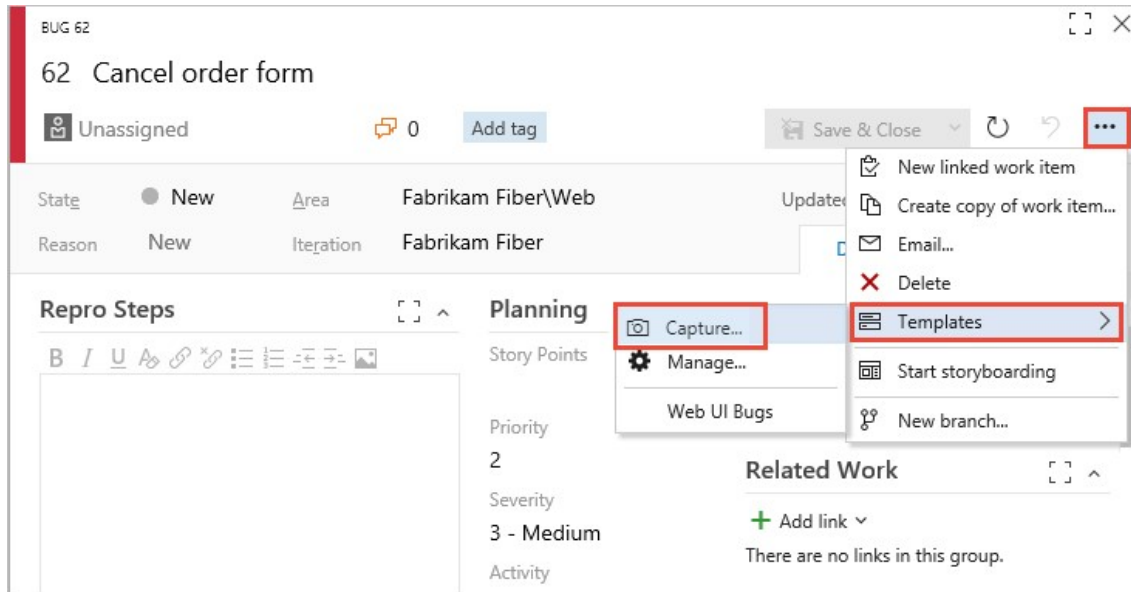
Visual Studio

1. From the web portal, open a work item which you'll use as the basis for a template.

Within the web portal, work item templates are associated with a team. Only those templates defined for a team are accessible when working in a team context, either through a work item form

or bulk update context menu.

2. Choose the **...** actions icon to open the menu. Choose **Templates** and then **Capture**.



Name the template and optionally define or clear fields. Save the template when finished. The template is saved under the team you selected in the first step.

A screenshot of the 'Capture Template' dialog box. It has a title bar with a close button. The 'Name' field is 'Web team bug template' and the 'Description' field is 'Priority 2 bugs to capture'. Below these fields is a section for defining fields. It has a table with 'Field' and 'Value' columns. The fields are: 'Area Path' (Fabrikam Fiber\Web), 'Iteration Path' (Fabrikam Fiber), 'Priority' (2), 'State' (New), and 'Value Area' (Business). Each field has a '+' and a '-' icon. Below the table is a section for 'Add a comment' with a rich text editor. The comment is 'Initial template design.' At the bottom, there is a 'Copy Link' button and 'Save' and 'Close' buttons.

3. Once you've saved the template, choose **Copy link** to capture the URL for the template that you can use to add work items using the template.
4. Use the URL whenever you want to add a work item of the type you've defined with its predefined values.

You can save the URL as a text file or add the URL to a [dashboard](#) or web page as a hyperlink.

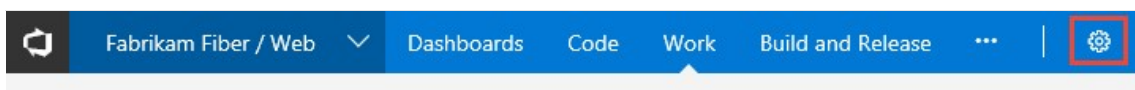
Add a work item using a template

The main method for adding a work item using a template is to open the template link within a browser window. You can then share these links through email, a network share, team portal, or a team dashboard or Welcome page.

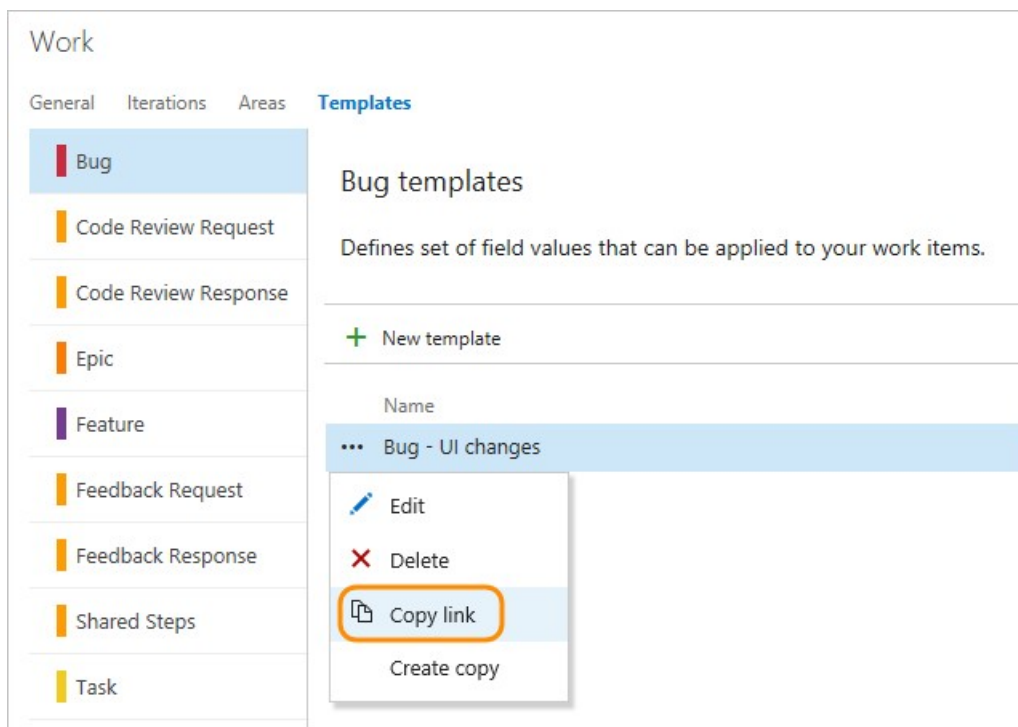
Copy the link to a template

Browser Visual Studio

1. Choose the ⚙ gear icon to open the settings for a team.



2. Choose the **Work>Templates** tab. Then, choose the ... actions icon for the template you want to copy and select **Copy link**.



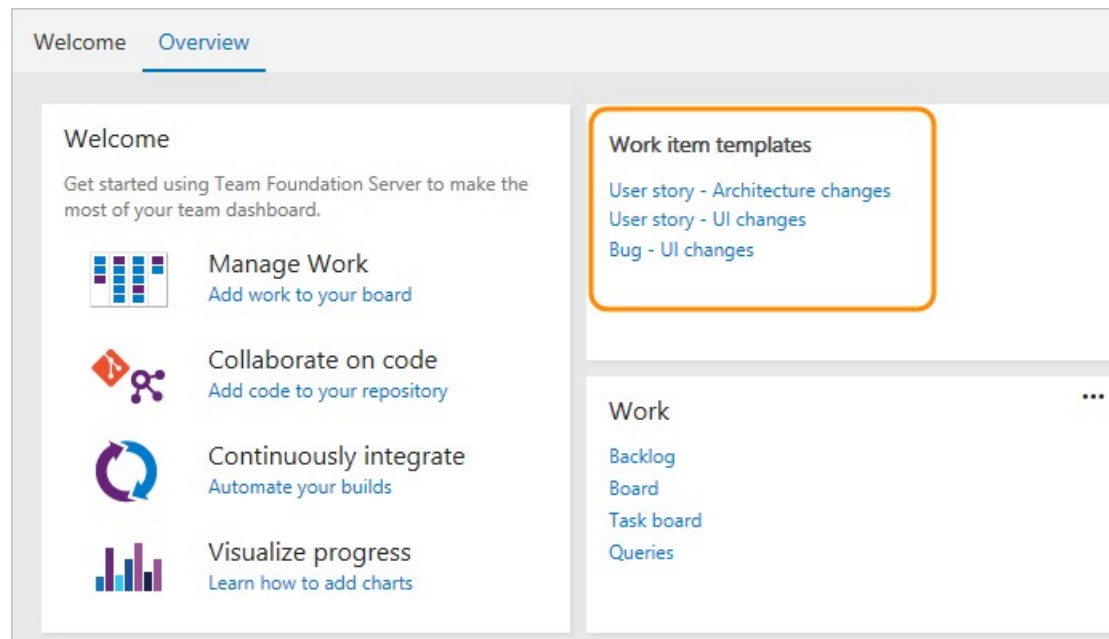
3. Copy the link to a shared network or send to your team via email. Also, consider [adding a link the team dashboard](#).
4. Use the URL whenever you want to add a work item of the type you've defined with its predefined values.

You can save the URL as a text file or add the URL to a web page as a hyperlink.

Add a template link to the dashboard

You can add links to a markdown widget that appear on your team dashboard in the web portal. These links open a work item with the template defined fields predefined.

For example, the following widget contains links to three templates.



To learn more about the markdown widget see [Add Markdown to a dashboard, Markdown widgets](#).

Apply a template to existing work item(s)

You can apply a template to a single work item or perform a bulk update of several work items.

Browser

Visual Studio

Apply a template within a work item form

1. Open the work item that you want to update using the fields defined within a template, choose the **...** actions icon to open the menu, select **Templates** and then select the name of a pre-defined template.

USER STORY 9

9 Welcome page

Unassigned 0 Add tag

Save & Close

...

State New Area Fabrikam Fiber\Web Updates

Reason New Iteration Fabrikam Fiber

Repro Steps

Planning

Story Points

Priority 2

Risk

Capture...

Manage...

Architecture changes

UI user stories

+ Add link

There are no links in this group.

New linked work item

Create copy of work item...

Email...

Delete

Templates

Start storyboarding

New branch...

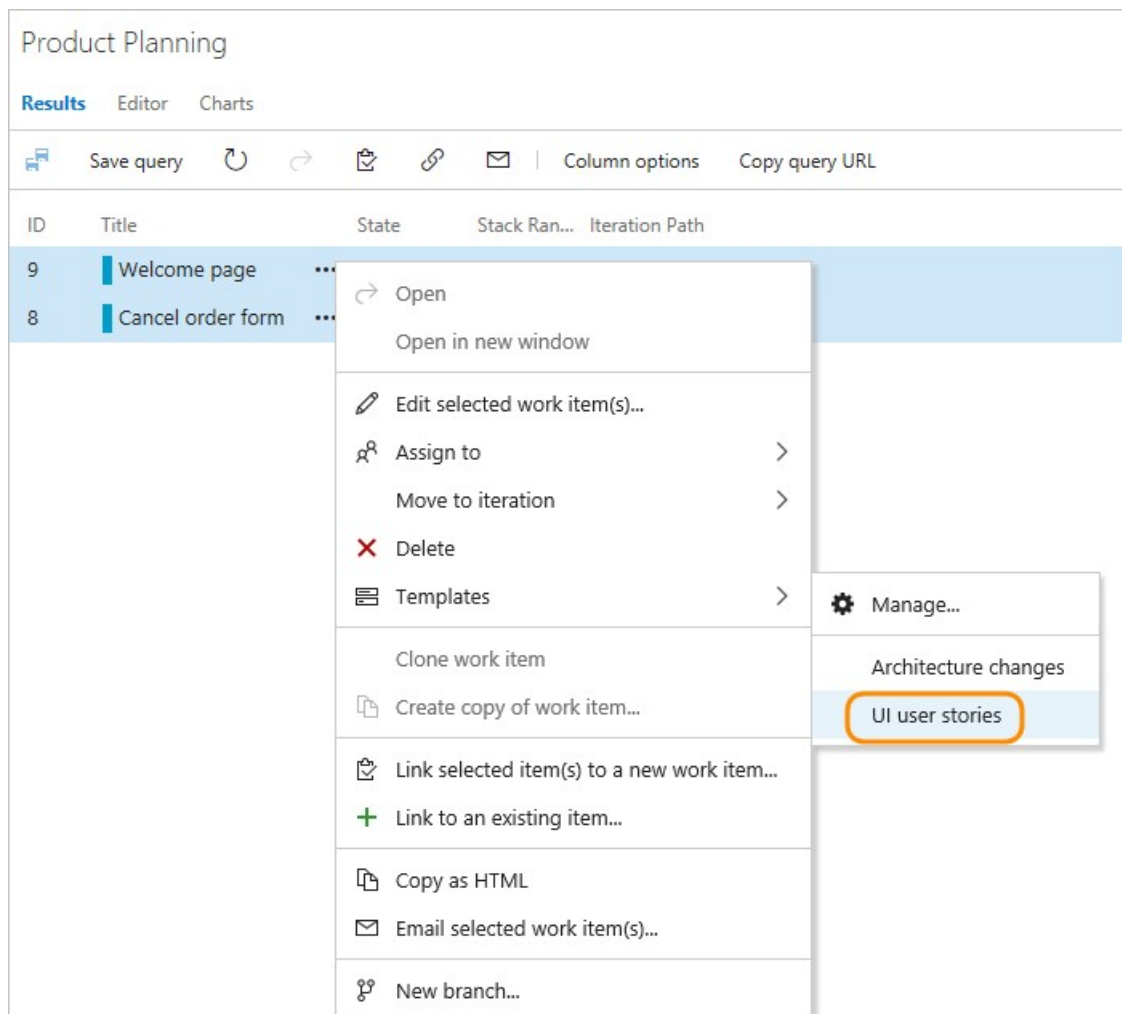
Dica

Refresh your browser to discover the latest templates that have been added. If you don't see any templates, it may be that there are none defined for the work item type.

2. Save the work item for the changes to be applied. The fields changed are noted in the History field.

Apply a template to several work items (bulk update)

1. To bulk update several work items, first select them from the backlog or a query results list, and then open the actions menu for one of them. All work items you select must be of the same work item type. For example, all user stories or all bugs.
2. Choose the template to apply.



3. Field changes are automatically applied and work items saved. To learn more about bulk updates, see [Bulk modify work items](#).

Manage work item templates

Browser

Visual Studio

You can view the list of templates defined for each work item type, and also add, edit, copy, delete, and

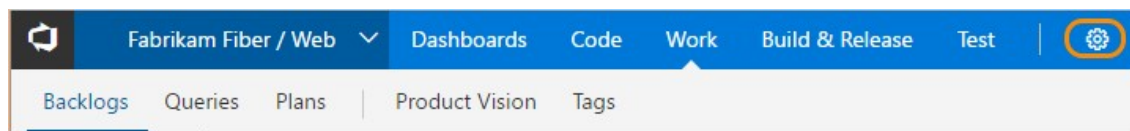
copy the link of a template. All templates are defined and managed for a team.

You manage templates from team settings. All templates are defined for a team. If you're not a team administrator, [get added as one](#). Only team or project administrators can change work item templates.

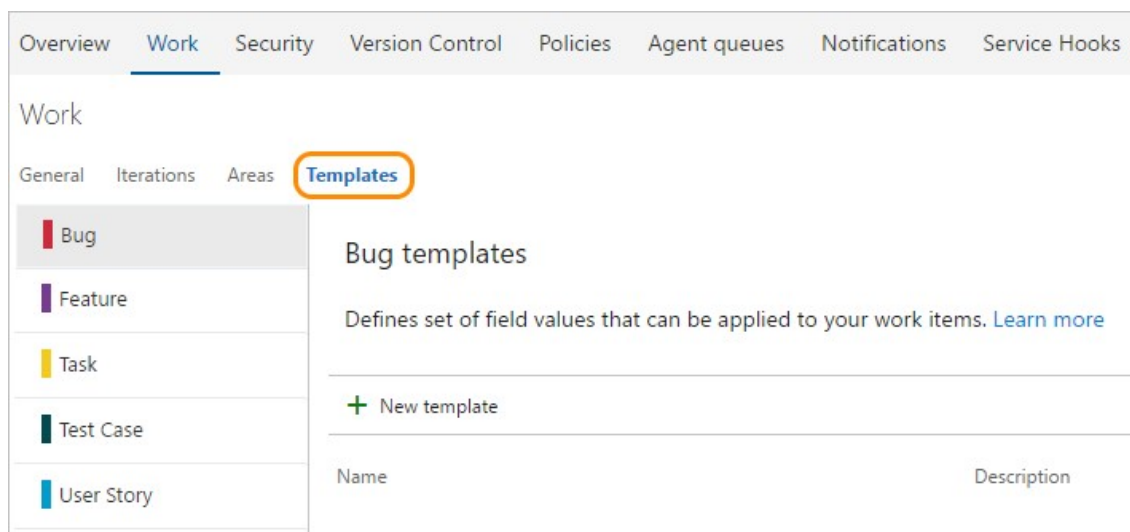
1. From the web portal, open settings for a team.

Choose the ⚙ gear icon to open the settings for a team.

Here we open the admin page for the Web team.



2. Choose **Work**>**Templates**.

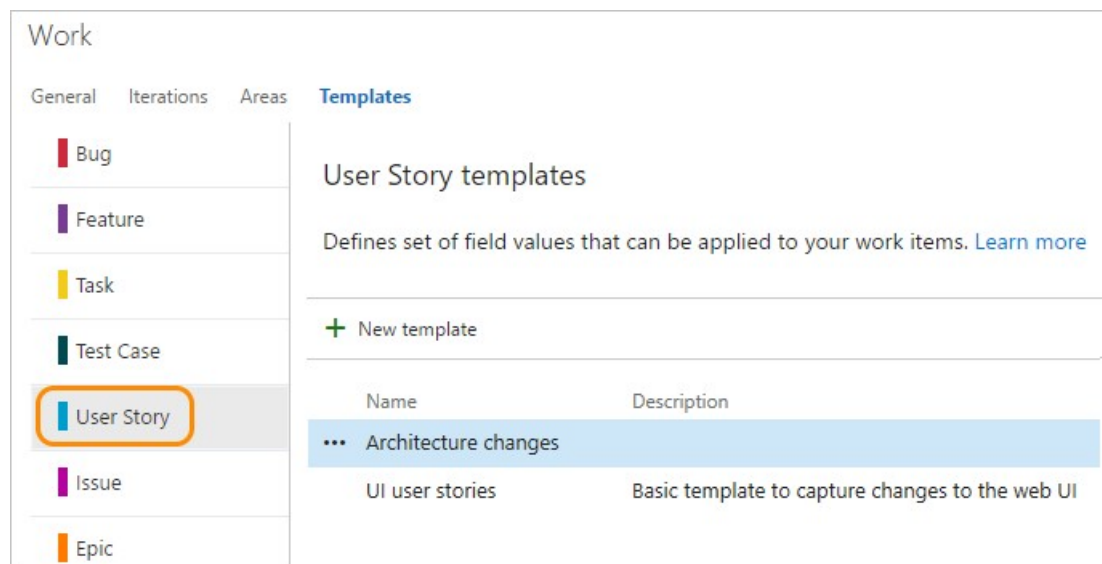


From here, you can click any work item type to view or add templates for that type.

Manage templates for a work item type

Choose the work item type to view the templates defined for each type.

For example, choose User Story to view templates defined to capture user stories.



Define a template from scratch

1. From the work item type page, choose the **+ New template** to create a template from scratch.

User Story templates

Defines set of field values that can be used to create work items.

+ New template

Name

Description

+ Add new field

Field	Value
+ X [dropdown]	[text box]

Add a comment

B I U [link icon] [unlink icon] [list icon] [ul icon] [indent icon] [outdent icon]

[Copy link icon] Copy link

Save the template in order to enable Copy link.

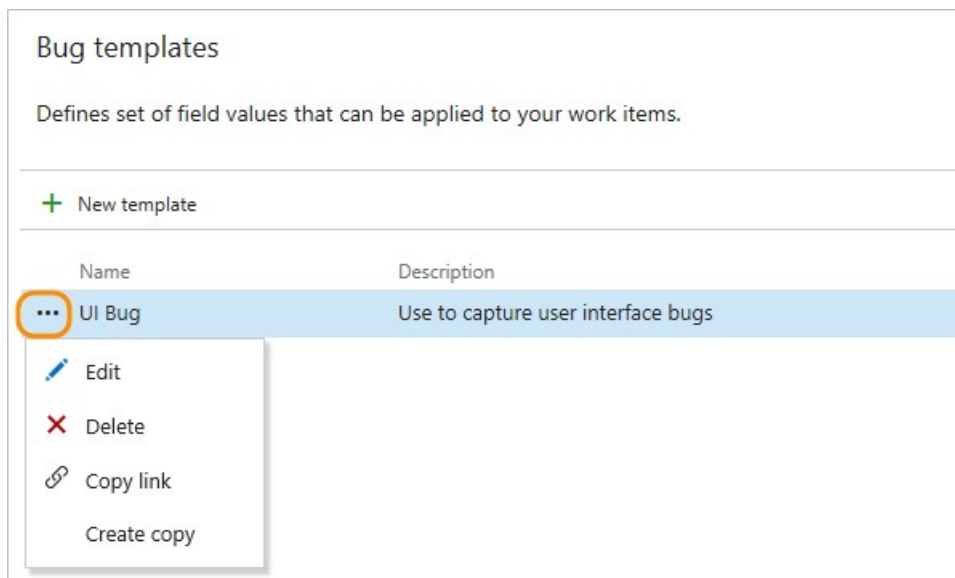
Save Close

2. Name the template and optionally add and remove fields. Save the template when finished.

Once you've saved the template, click Copy link to capture the URL for the template that you can use to add work items using the template.

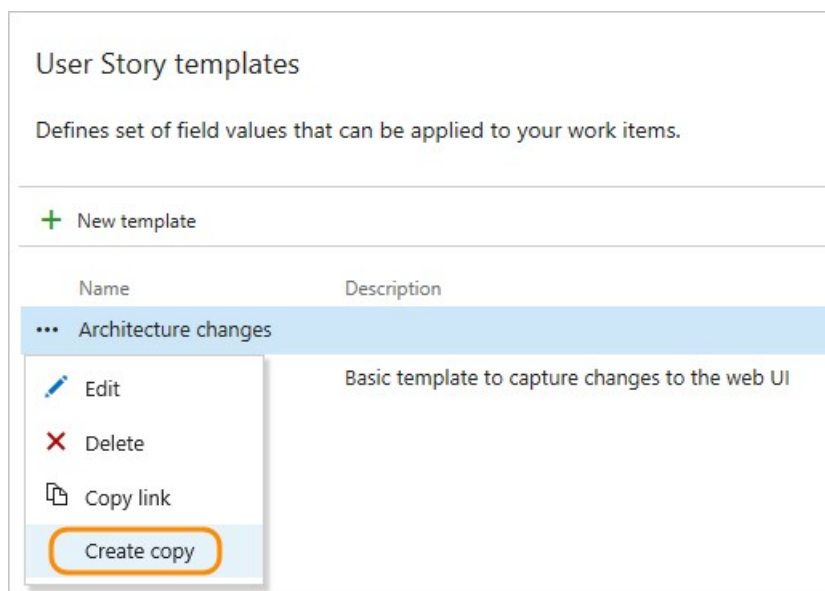
Edit, delete, or copy link to a template

From the work item type page, choose **...** the actions icon for an existing template to access the menu options to **Edit**, **Delete**, or **Copy link**.



Copy or duplicate a template

1. To duplicate an existing template, choose **...** the actions icon for an existing template and select the **Create copy** option.



2. Name the template and optionally add and remove fields. Save the template when finished.

Add or remove tags from templates

You can add tags to a template and they'll be applied to the work item when you use the template. To add two or more tags, delimit them with a comma (,).

×

Edit template

Name

Bug template

Description

+ Add new field

Field	Value
+ × Area Path	= Unknown Path
+ × Found In	= CS.Working_2017_03_04
+ × Iteration Path	= Fabrikam Fiber\Release 1\Sprint 2
+ × Priority	= 2
+ × Severity	= 1 - Critical
+ × Tags (Add)	= Mobile, Phone

Add a comment

B I U

Critical bug template

Copy link

Copy the URL to add a work item using this template.

Save

Close

If you don't specify tags to remove, then all tags present in a work item will remain defined even when you apply a work item template to an existing work item.

Define an ad hoc work item template using a hyperlink

You can specify a work item template that specifies several field values using the following syntax. Use the URL whenever you want to add a work item of the type you've defined with its predefined values.

URL	Copiar
<pre>http://{ServerName}:8080/tfs/DefaultCollection/{ProjectName}/_workItems/create/{WorkItemType}? [FieldReferenceName 1]={FieldValue 1}& [FieldReferenceName 2]={FieldValue 2}& [FieldReferenceName 3]={FieldValue 3}& . . .</pre>	

For example, the following syntax specifies a work item task with title *TaskTitle*, and specifies values for the Assigned To, Description, Tags, Activity, and Iteration Path fields.

URL	Copiar
<pre>http://{ServerName}:8080/tfs/DefaultCollection/{ProjectName}/_workItems/create/Task? [System.AssignedTo]=Jamal+Hartnett& [System.Description]=<p>Always+include+Remaining+Work+and+links+to+any+related+bugs+or+user+sto- ries.</p>& [System.Tags]=Web;+Phone;+Service& [Microsoft.VSTS.Common.Activity]=Development&</pre>	

```
[System.IterationPath]=Fabrikam+Fiber%5CIteration+1
```

💡 Dica

There is a 2000 character limit recognized by browsers.

You can save the URL as a text file or add the URL to a [dashboard](#) or web page as a hyperlink.

Q & A

Q: How do I set a default template for a team?

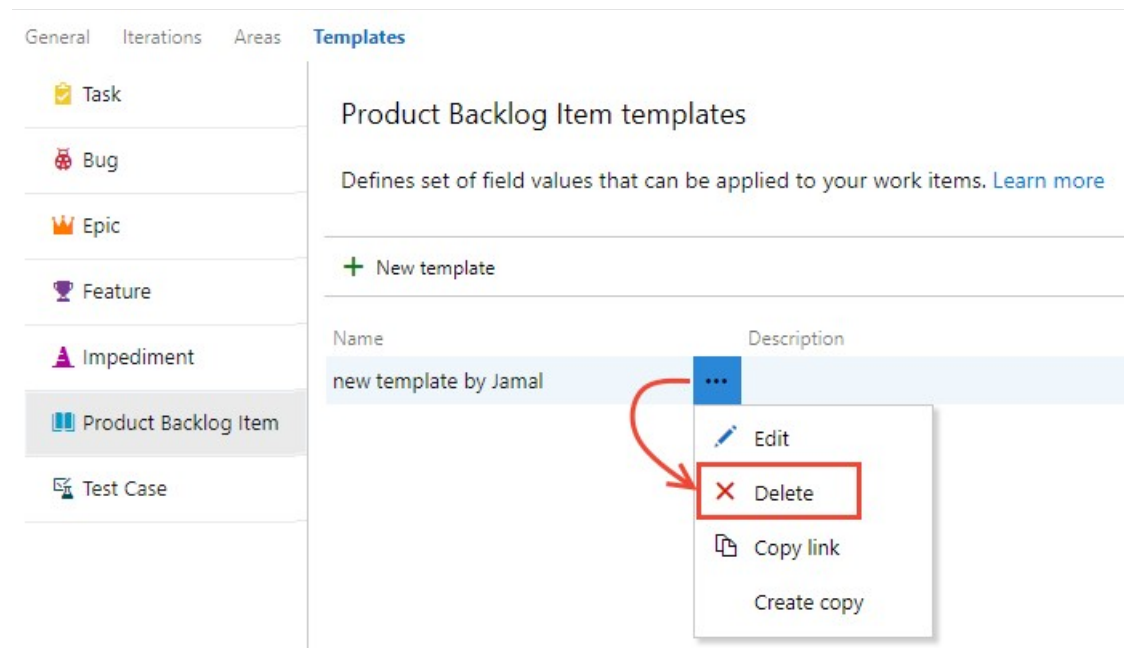
A: The feature to set a default template for a team isn't supported at this time.

Q: Can I copy a work item template to another team or project?

A: No. This feature isn't supported at this time.

Q: How do I delete a work item template?

A: From the work item type page, choose **...** the actions icon for an existing template and select the **Delete** option.



How do I create a template with links to other work items?

You can't create templates that contain default links to work items. However, you can quickly copy tasks, bugs, and other items using [Excel](#) to apply parent-child links in a tree list.

Or, you can use a Kanban board to add child tasks, backlog items, or features. To learn more, see:

- [Add task checklists](#)
- [Add, run, and update inline tests](#)
- [Add features and epics](#)

Related articles

- [Sample work item templates](#)