

TFS 2010 Work Items Basic User Guide

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1. Introduction

Team System is very powerful when it comes to **manage development and QA**, in order to manage development and QA you will need to have Requirements, Tasks, Bugs etc. and the links between them.

In Team System there is a **generic object** that covers all that is needed, it is called **Work Item**.

What is a Work Item?

A work item is a **generic object that has types**, for example: Requirement, Task, Bug, etc.

The **Work Item types that are available "out of the box"** in Team system **are not the only types available**, you can create new types as needed in your QA and development process.

Using these **Work Items** you can **control your development and QA processes**, for example using bugs will help you manage the quality of your product.

All Work Item types are configurable, it is required in order to have the System, Support the methodologies and process you are using and not the other way.

How to create new types and how to make configurations to the Work Item types, are subjects that will be covered in a different guide.

In the following 4 chapters that will be related to this user guide I will focus on the day to day tasks with Work Items using the Team Explorer 2010.

2. Create New Work Items

On this chapter I will show different ways to create new work items from the Team Explorer 2010.

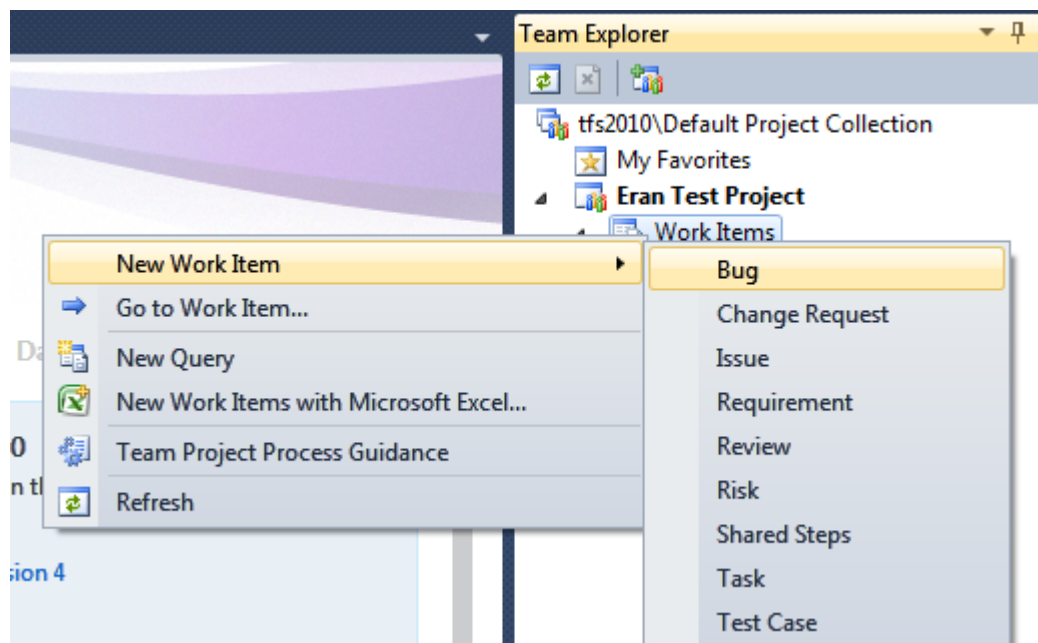
In order to show the Team Explorer in Visual Studio click on its icon.

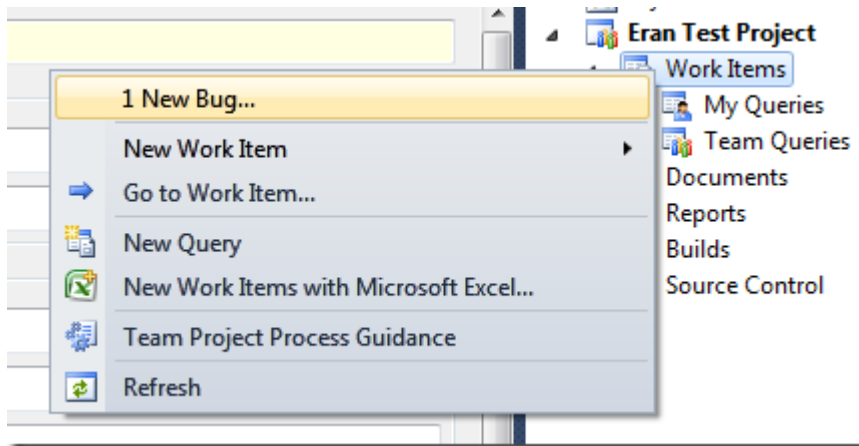


There are two main methods to create Work Items, from the Team Explorer --> Work Items menu or from the Team tab.

In order to create a new work item from the Team Explorer --> Work Items menu do the following:

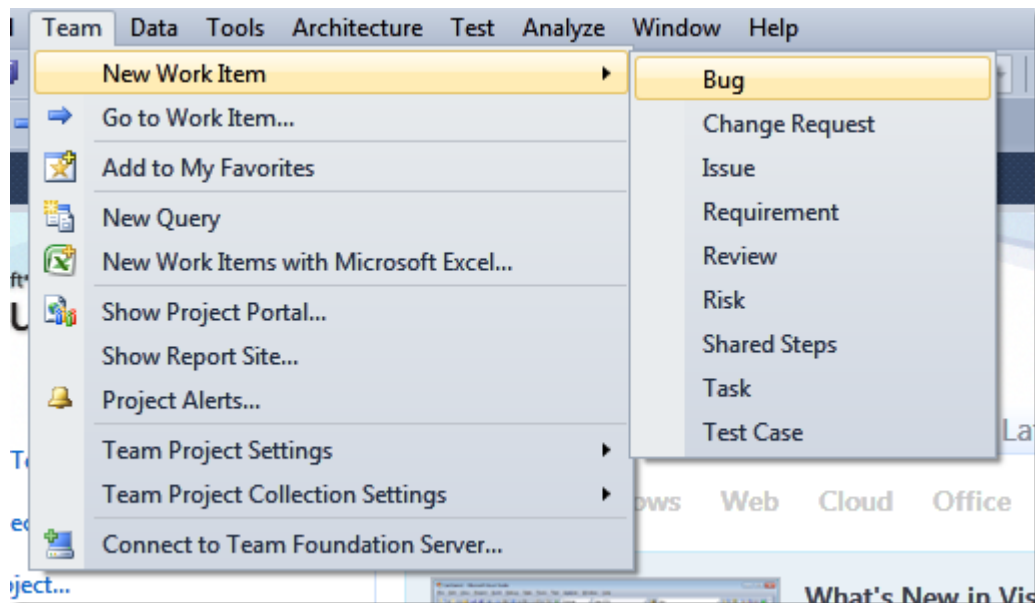
Right click the Work Items menu item **choose** the "Add Work Item" and **choose** the Work Item type you like to create from the list of Work Item types.





In order to create a new work item from the Team tab do the following:

Click the Team tab **choose** the "Add Work Item" and **choose** the Work Item type you like to create from the list of Work Item types.



The result of both methods is the same, a new form of the chosen Work Item type.

3. Work Item Link Types

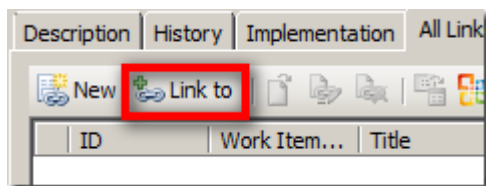
On this Chapter I will talk about one of the big changes in TFS 2010, the Link types between Work Items!

In any development process you will have many Work Items, Work Items in the development process are related to one another in many cases, in Team System 2005/2008 the relations between the work items are represented as the Work Item Links and the type of the link is “Related”.

The problem with one type of link between work items doesn’t show the real relation between the work items.

In TFS 2010 there is an extension to this solution that makes a revolution, **there are many new link types between work items that shows the real relation** between the linked work items.

In order to get to the Links of a Work Item **go to the Links tab and click on the “Link to” button.**



In my example there are two Work Items of type “Task” number 61 and 62, I will use all the link types to link between Work Item 62 as the initiator to Work Item 61.

Parent/Child – These two links are the most significant links, **there can be only one parent to each child** and each **parent have no limit for the number of children** he can have.

These types are significant when using the MSProject and Excel. (Different Post)

Add Link to Task 62: task 2

Select the link type and details.

Link type: **Parent**

Link details

Work item IDs:

Description:

Comment:

Link Preview Visualization:

Task 61: test 1

Task 62: task 2

Add Link to Task 62: task 2

Select the link type and details.

Link type: **Parent**

Link details

Work item IDs:

Description:

Comment:

Link Preview Visualization:

Task 61: test 1

Task 62: task 2

Predecessor/Successor – Use **Predecessor** when you need an **item to be done before the current Work Item**, for example a task that must be finished before the current task can start.

use **Successor** when you need the **current item to be finished before the linked item can be started**.

These types are the **same** as the **MSProject Predecessor and Successor**.

The screenshot shows a dialog box titled "Add Link to Task 62: task 2". The "Link type" dropdown is set to "Predecessor". In the "Link details" section, "Work item IDs" is 61, "Description" is "Task 61: test 1", and "Comment" is empty. The "Link Preview Visualization" shows a green box labeled "Task 61: test 1" with an arrow pointing to a blue box labeled "Task 62: task 2".

The screenshot shows the same dialog box, but the "Link type" dropdown is now set to "Successor". The "Link details" section remains the same. The "Link Preview Visualization" now shows a blue box labeled "Task 62: task 2" with an arrow pointing to a green box labeled "Task 61: test 1".

Tests/Tested By – These **link types** are very strong when **used with the Test Case Work Items, Tests** when **used from a Test Case** means that the **Test Case covers the linked Work Item**, it can be a bug, an issue or a requirement. **Tested By** is the opposite direction of “Tests” link, you **use it from bugs, issues, requirements etc.** the linked Work Item will be Test Case.

Add Link to Task 62: task 2 [?] [X]

Select the link type and details.

Link type: Tests

Link details

Work item IDs: 61 [Browse...]

Description: Task 61: test 1

Comment:

Link Preview Visualization:

Task 61: test 1 → Task 62: task 2

OK Cancel

Add Link to Task 62: task 2 [?] [X]

Select the link type and details.

Link type: Tested By

Link details

Work item IDs: 61 [Browse...]

Description: Task 61: test 1

Comment:

Link Preview Visualization:

Task 62: task 2 → Task 61: test 1

OK Cancel

Related – Not This is the regular related link type that we had in Team System 2005/2008, this link say that there is a relation between two work items it doesn't say what is the relation's nature.

The screenshot shows a dialog box titled "Add Link to Task 62: task 2". The "Link type" dropdown is set to "Related". In the "Link details" section, "Work item IDs" is 61, "Description" is "Task 61: test 1", and "Comment" is empty. The "Link Preview Visualization" shows a blue box labeled "Task 62: task 2" with a vertical line connecting it to a green box labeled "Task 61: test 1". "OK" and "Cancel" buttons are at the bottom right.

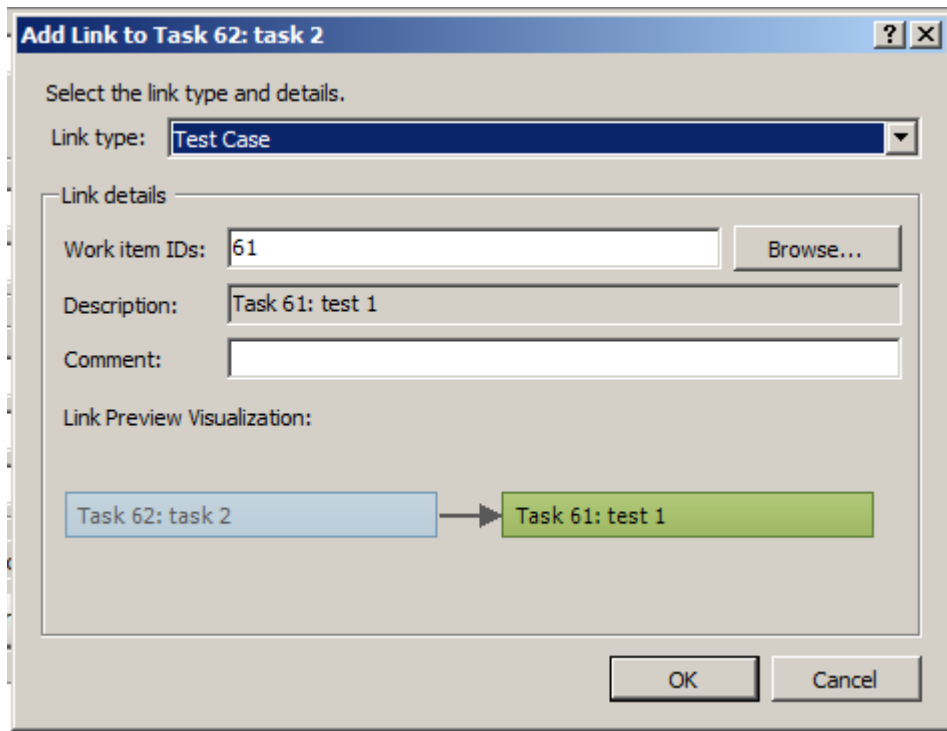
Affects/Affected By – Not much to say about these link types, they are self explanatory.

The screenshot shows the same dialog box, but the "Link type" dropdown is now set to "Affects". The "Link details" section remains the same. The "Link Preview Visualization" now shows a blue box labeled "Task 62: task 2" with a horizontal arrow pointing to a green box labeled "Task 61: test 1". "OK" and "Cancel" buttons are at the bottom right.

The screenshot shows a dialog box titled "Add Link to Task 62: task 2". The "Link type" dropdown is set to "Affected By". In the "Link details" section, "Work item IDs" is 61, "Description" is "Task 61: test 1", and "Comment" is empty. The "Link Preview Visualization" shows a green box labeled "Task 61: test 1" with an arrow pointing to a blue box labeled "Task 62: task 2".

Shared Step/Test Case – These link types are used only in two case, from Shared Steps Work Items you use the Test Case link to a Test Case Work Item, that means that the Shared Steps Work Item is used in the linked Test Case Work Item. From a Test Case Work Item you use the Shared Step link to a Shared Steps Work Item, that means that the Teat Case Work Item is using the linked Shared Steps Work Item.

The screenshot shows the same dialog box "Add Link to Task 62: task 2", but the "Link type" dropdown is now set to "Shared Steps". The "Link details" section remains the same: "Work item IDs" is 61, "Description" is "Task 61: test 1", and "Comment" is empty. The "Link Preview Visualization" still shows a green box labeled "Task 61: test 1" with an arrow pointing to a blue box labeled "Task 62: task 2".



So we can see there is a great verity of link types in TFS 2010 that helps us manage the development process in greater efficiency.

4. Create and Use Queries

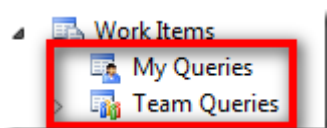
On this chapter I will talk about Queries.

In order to see the Work Items you have entered to the Team System you will need to create a "Search", **the way you search the Team System is by Queries.**

Queries contains filters, you can put filters on each of the Work Item fields.

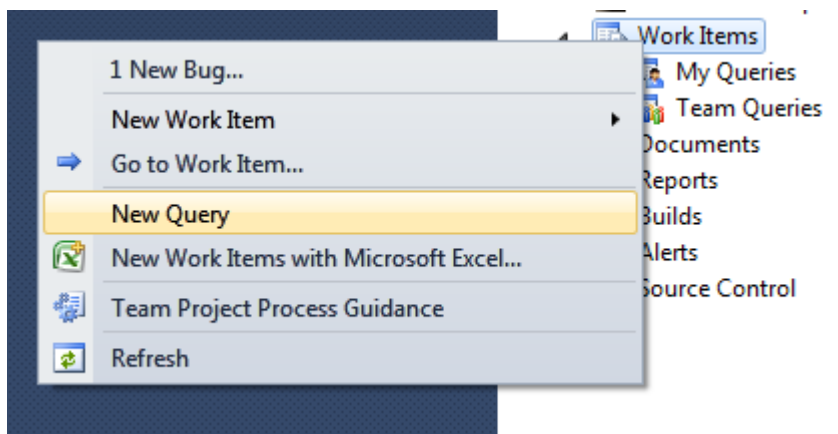
There are two groups of queries:

- **Team Queries** – These queries are available to the entire group and are created and modified by the Project Administrator.
- **My Queries** – These are personal queries that will be available to me only and are created and modified by the user.



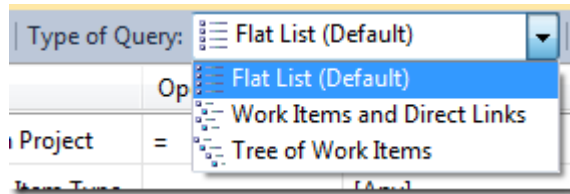
In order to create a query, do the following:

Step 1: Right Click the "Work Item" folder in the Team Explorer and choose "New Query"



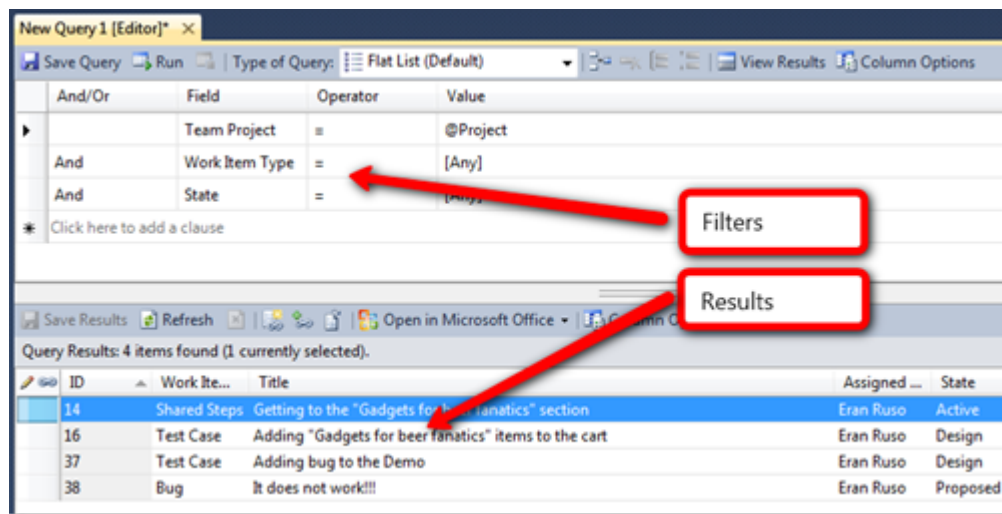
There are 3 types of queries:

1. **Flat List (Default)** – A query that is based on Work Items only without any filter on the linked Work Items. (First Level Only)
2. **Work Items and Direct Links** – A query that is based on all the filters of the Flat List, Filters on the Linked Work Item Type and Filters on the Link Types.
3. **Tree of Work Items** – A query that is based on all the filters of the Flat List and on the Linked Work Item Type where the link type are Parent/Chilled.



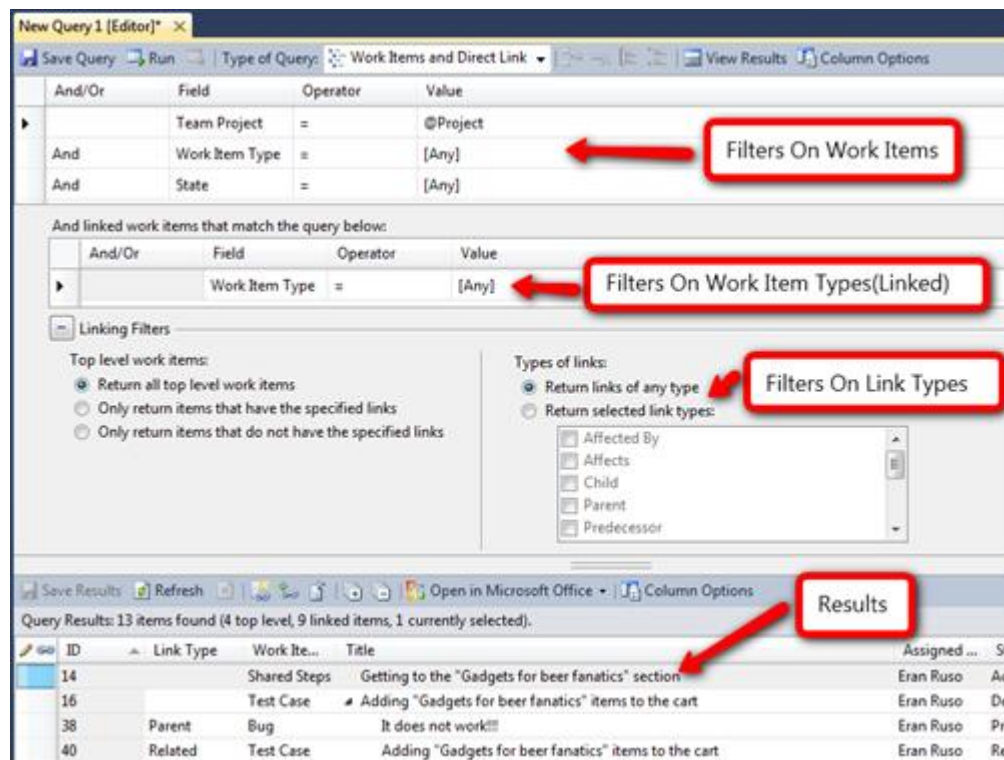
For the “Flat List” there are two sections in the Query editor window:

1. **Filters Section** – Where you can add filters to your query, filters can be added to every field exist in you work item type.
2. **Results Section** – Where you will see the results of the query you build.



For the “Work Items and Direct Link” there are four sections in the Query editor window:

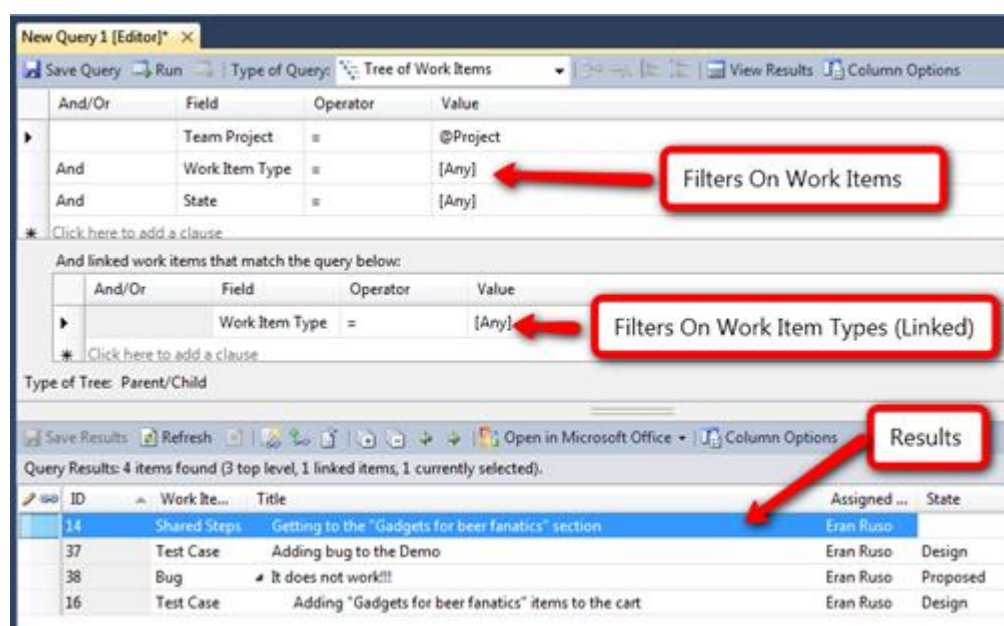
1. **Filters On Work Items Section** – Where you can add filters to your query, filters can be added to every field exist in you work item type.
2. **Filters On Work Item Types (Linked)** – Where you can add filters on the linked work items by their Work Item Type.
3. **Filters On Link Types** – Where you can add filters by the link type.
4. **Results Section** – Where you will see the results of the query you build.



For the "Tree of Work Items" there are three sections in the Query editor window:

1. **Filters On Work Items Section** – Where you can add filters to your query, filters can be added to every field exist in you work item type.
2. **Filters On Work Item Types (Linked)** – Where you can add filters on the linked work items by their Work Item Type.
3. **Results Section** – Where you will see the results of the query you build.

Note: The link type that will be shown is of type Parent/Child

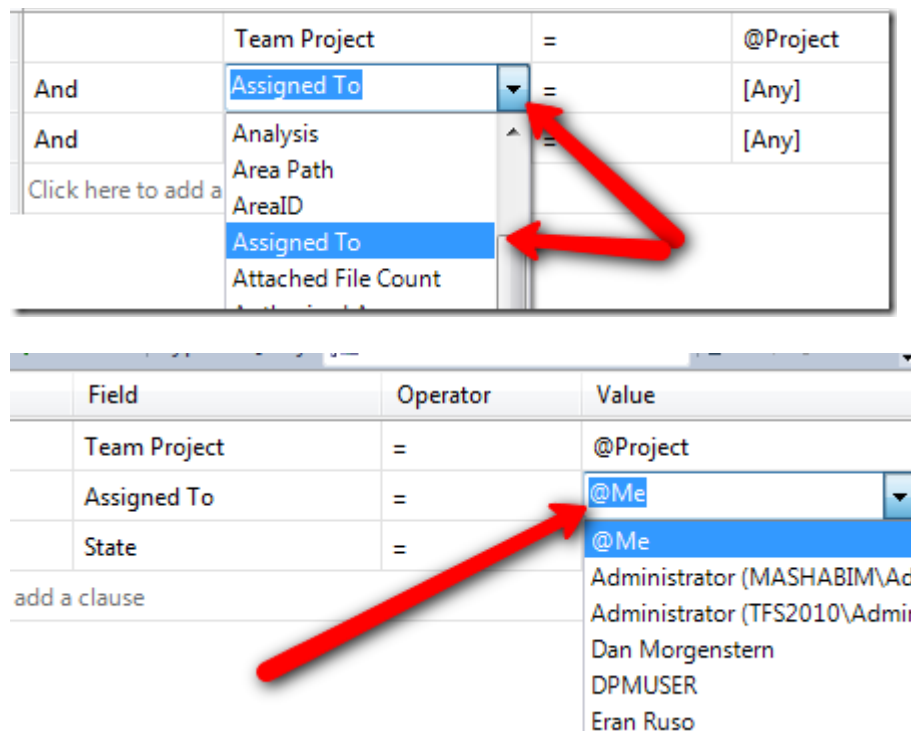


Step 2: Choose the Query type you like to build.

Step 3A: No matter what type of query you choose to build you will need to start by adding filters to the query, in case you like to see all the Work Items that are in the system don't add any filters just run the query with the default Team Project filter.

For this example I have added the "Assigned To" filter, I have set it to be "@Me".

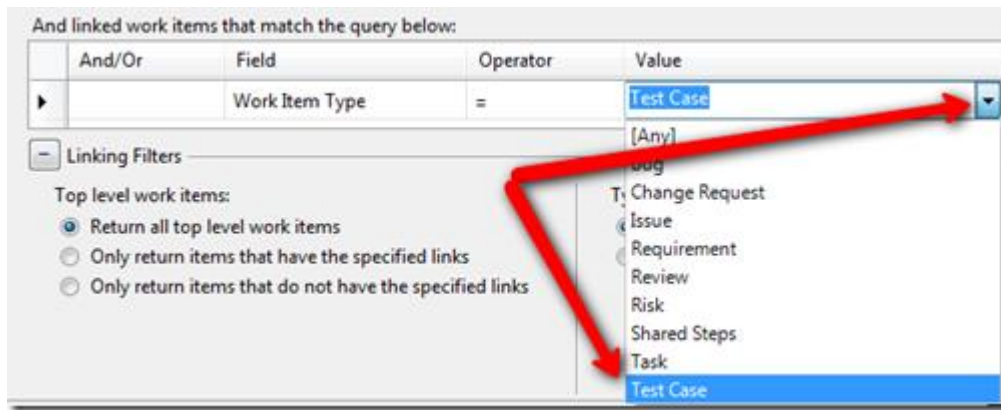
Note: The default filter just set the Team Project contexts of the query, @Project means the project I am in now and @Me for the Assigned To field means assigned to my user name.



If you use the “Flat List” go to **step 4**

Step 3B: If you use the “Work Items and Direct Link” or the “Tree of Work Items” you will now need to add filters for the **linked work item types**, just add Work Item Types to the “Filters On Work Item Types (Linked)” section.

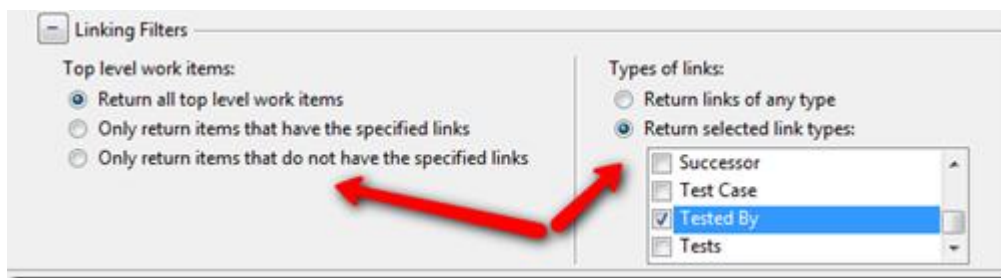
In my example I have added “Test Case” as filter, you can add as many as you need.



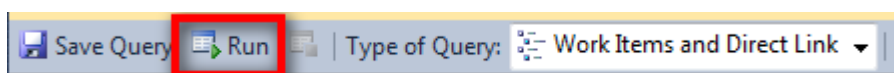
If you use the “**Tree of Work Items**” go to **step 4**

Step 3C: If you use the “**Work Items and Direct Link**” you will now need to add filters for the **link types**, to do that you will choose the “Top level work items” radio button and use the check boxes of the “Types of links:” to control the returned linked items.

In my example I have chosen “Tested By” as filter, you can choose more than 1.



Step 4: When you have finished setting the filters run the query to see if you get the results you need, click the "Run" button from the menu.



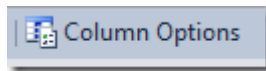
Query Results: 6 items found (4 top level, 2 linked items, 1 currently selected).

ID	Link Type	Work Item Type	Title	Assigned To	State
14		Shared Steps	Getting to the "Gadgets for beer fanatics" section	Ernan Ruso	Active
16		Test Case	Adding "Gadgets for beer fanatics" items to the cart	Ernan Ruso	Design
37		Test Case	Adding bug to the Demo	Ernan Ruso	Design
38		Bug	It does not work!!!	Ernan Ruso	Proposed
37	Tested By	Test Case	Adding bug to the Demo	Ernan Ruso	Design
41	Tested By	Test Case	Adding bug to the Demo	Ernan Ruso	Design

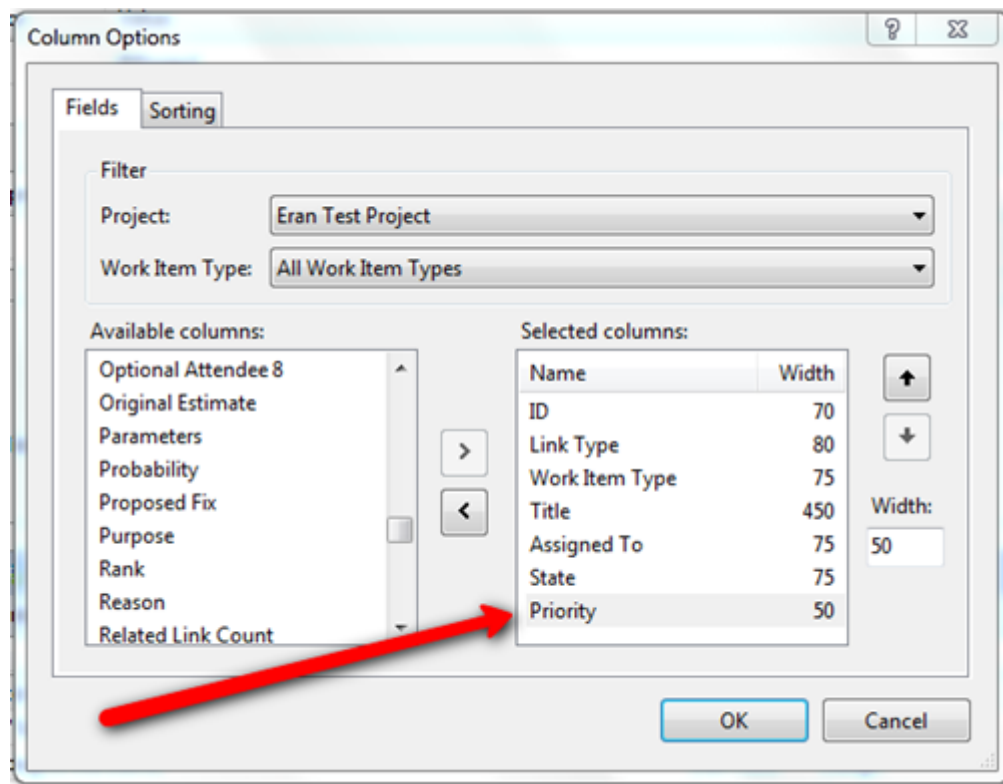
You get a list of work items that answers the filters you have just set, see that the linked work items that were returned are from type “Test Case” and the link type is “Tested By”.

Step 5: By default you get the “Link Type”, “Work Item Type”, “Title”, “Assigned To” and “State” columns in the results window, in order to change that just click

“Columns Options” button and choose the columns that you like to see and there order.



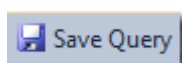
Step 5: From the left hand side choose each of the fields you like to see in the results window and pass them to the right hand side of the window, you can also choose their locations by using the arrow buttons located next to the left hand side of the window and you can also control their default width by changing the value in the text box under the arrow buttons.



I have chosen to see the “Priority” in this example the result is the "Priority" column.

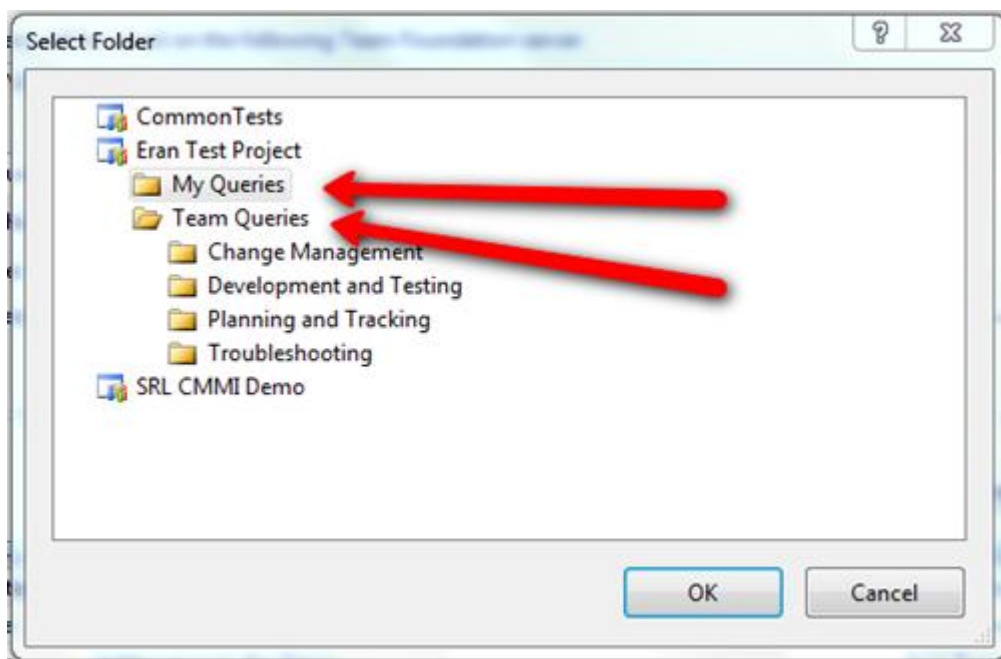
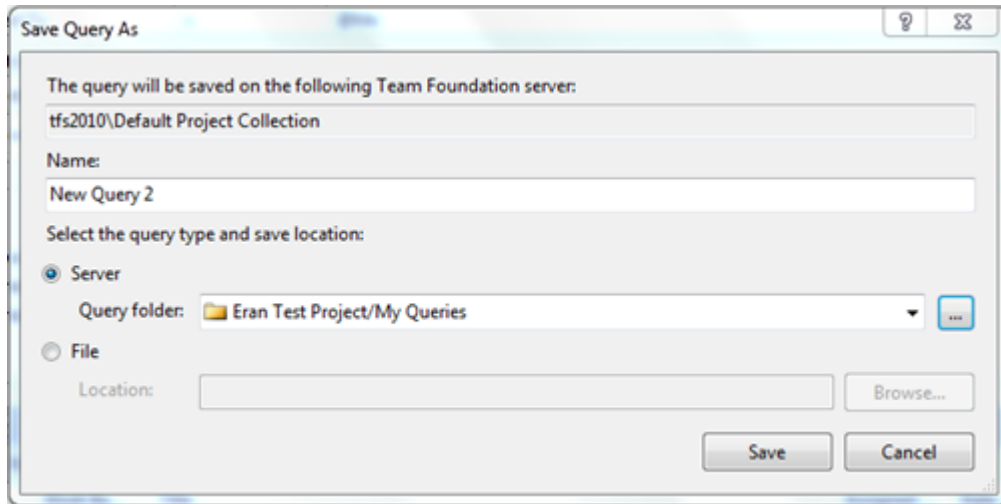
ID	Link Type	Work Item...	Title	Assigned ...	State	Priority
14		Shared Steps	Getting to the "Gadgets for beer fanatics" section	Eran Ruso	Active	2
16		Test Case	Adding "Gadgets for beer fanatics" items to the cart	Eran Ruso	Design	2
37		Test Case	Adding bug to the Demo	Eran Ruso	Design	2
38		Bug	It does not work!!!	Eran Ruso	Proposed	2
37	Tested By	Test Case	Adding bug to the Demo	Eran Ruso	Design	2
41	Tested By	Test Case	Adding bug to the Demo	Eran Ruso	Design	2

Step 6: When ready save the query by clicking the "Save Query" button.



The save window gives 2 save options:

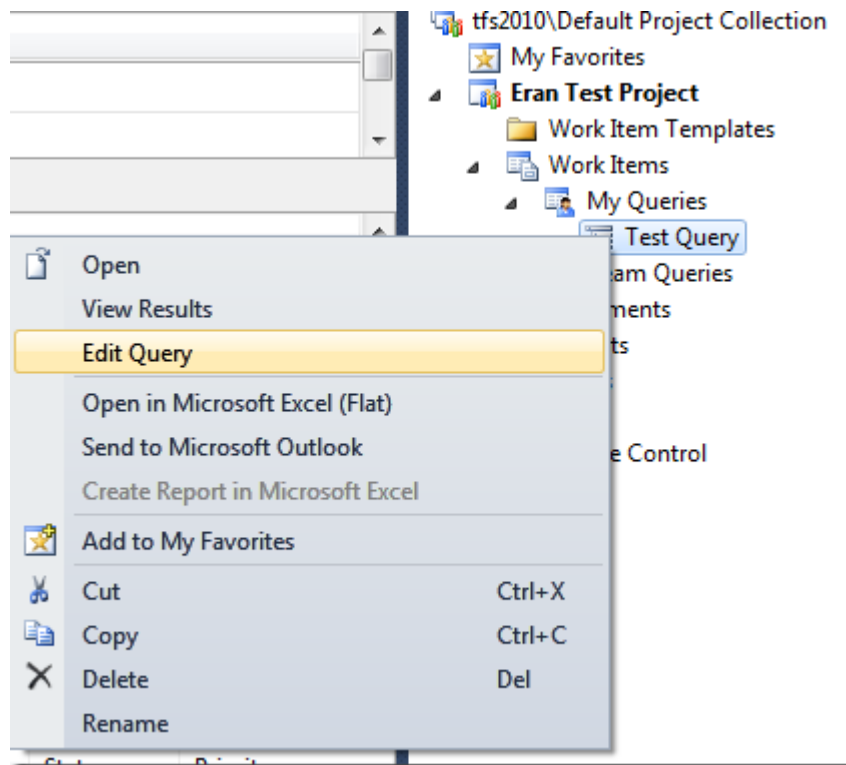
1. **Server** – You can save to the “Team Queries” or to the “My Queries” you choose that by clicking the 3 dots and choose the folder from the window that pops up.
2. **File** – When you will like to pass a query to other team members you can use this option to export a query.



Now that you have a saved query you can do three things:

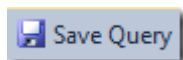
1. **Run the query** – Double click the query.
2. **Delete the query** – Right click the query and choose "Delete".
3. **Edit the query** – Follow these steps:

Step 1: Right click the query and choose "Edit Query".



Step 2: Make changes

Step 3: Save changes



As you can see, managing queries is very simple and intuitive.

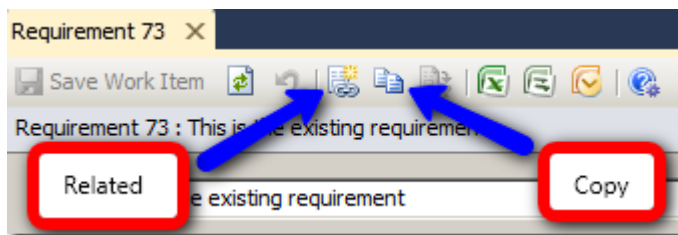
Now that you know how to create and manage queries you can get to the information stored in the TFS in an easy and comfortable way.

5. Create New Work Items Out Of an Existing Work Items

On this chapter I will talk about creating Work Items out of existing work items.

Creating Work Items out of existing Work Items can be done in two ways:

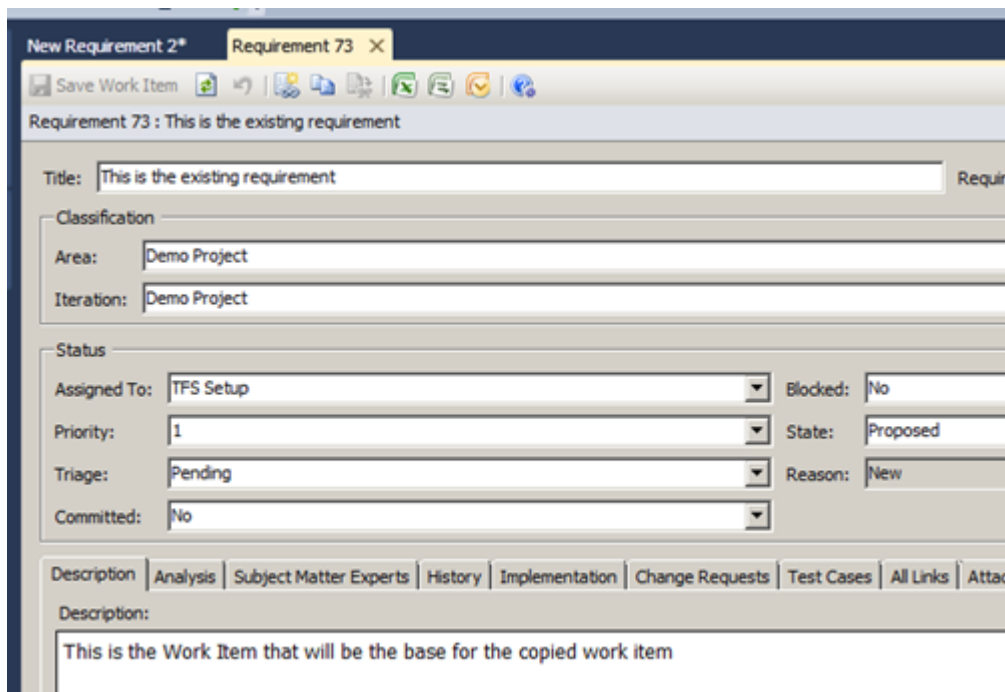
1. Create a copy of the existing Work Item
2. Create a related Work Item to the Existing Work Item



To create a copy do the following:

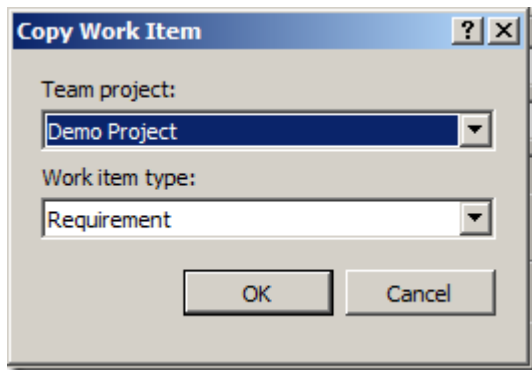
Step 1: Open the existing Work Item and Click on the “Copy Work Item” button.

In the screenshot you can see the existing Work Item.



Step 2: Choose the target Team Project and the Work Item Type.

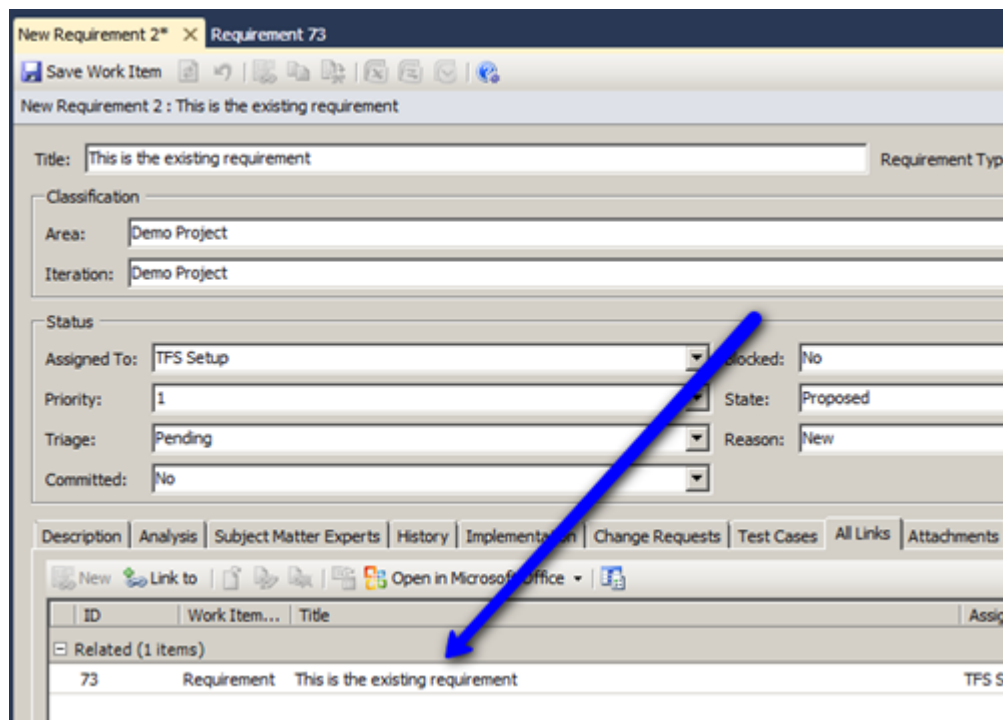
You can choose any Work Item Type you like; I have chosen the same type “Requirement”.



What you will now have is a **copy of the source Work Item**, in case you will **choose to create a different Work Item Type** from the source Work Item Type **only the sheared fields will be filled**.

In the **Links** tab of the new Work Item you will see a **link to the source Work Item**.

When saving your new Work Item you will get cross links, there will be a link from the source Work Item to the new Work Item and vice versa.

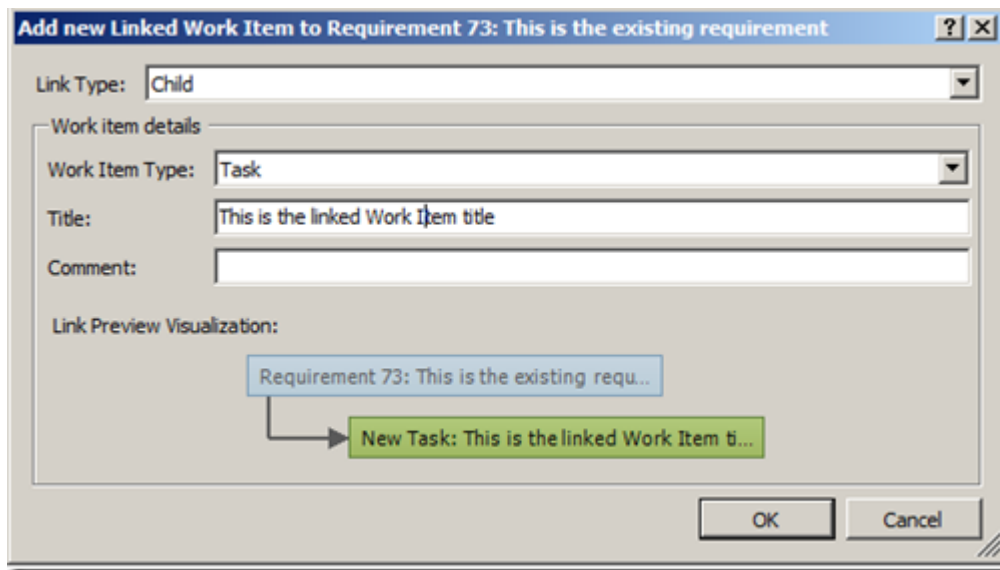


Many times you will need to create Work Items that are similar, using the copy Work Item option saves a lot of Copy/Pastes and time.

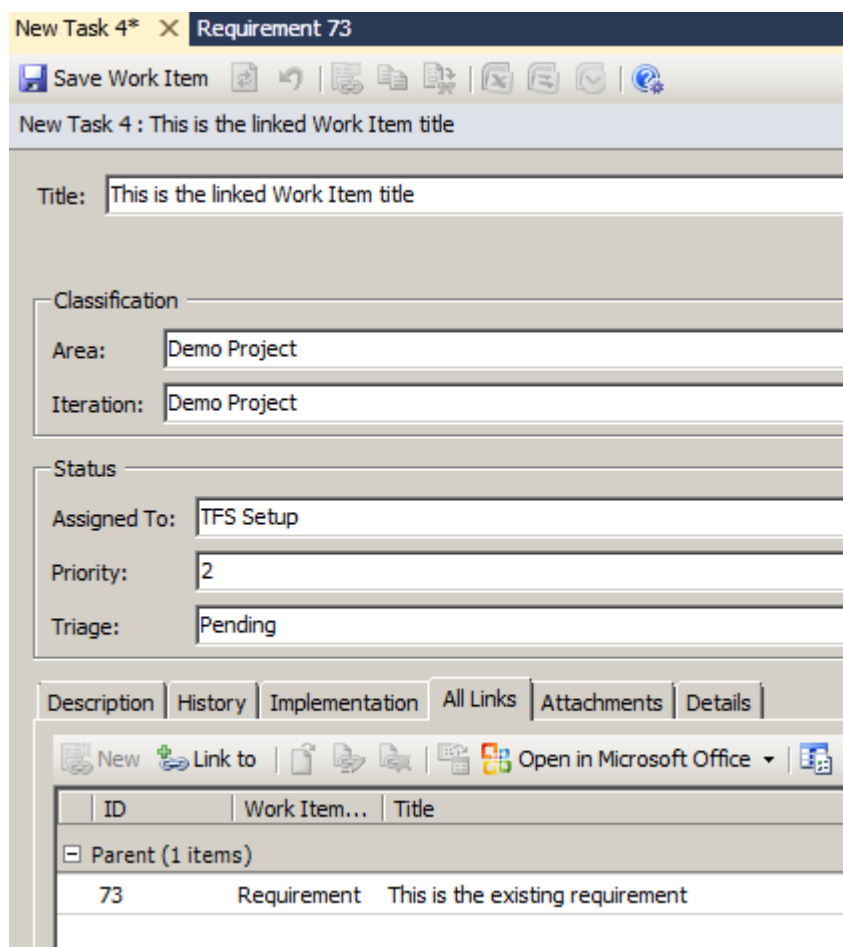
To create a related Work Item do the following:

Step 1: Open the existing Work Item and **Click on the “New Linked Work Item...”** button.

Step 2: Choose the type of the link the **Work Item Type** type the Work Item title and click the OK button.



A new work item is now created that will be linked to the Existing Work Item, the link type is the one you have chosen in step 2.



All you got left to do is "Save" the new Work Item.

6. Summary

In this guide we have seen how to work with Work Items.

I hope you liked this guide and learned how to have get more out of your TFS.

This guide was written based on a series of posts that I have published in the [My Blog](#) with small modifications.

Have Fun!!!