

# Connecting OneDesk to “Team Services - Visual Studio Online”

## Pre-requirements

- [TeamServices](#) - Visual Studio Online account
- [Zapier](#) account
- [OneDesk](#) account with a dedicated user for integrations with administrative rights

## Description

When fully configured the Team Services integration will push work items / epics from OneDesk to Visual Studio Online, and then will keep synchronized comments and item updates bidirectionally.

## Optional configuration

You can use existing (pre-configured) item types and life cycle status to trigger the initial push from OneDesk to TFS. The recommended way is to create a separate item type and/or a separate lifecycle status.

The steps to configure a new item type (epic) and a new lifecycle status (SYNC TO TFS) are:

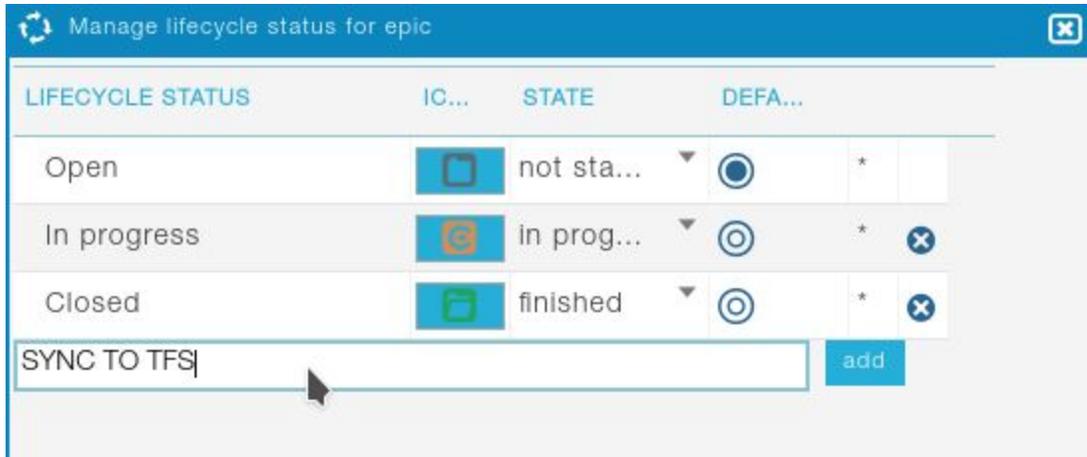
1. In your OneDesk account go to Administration -> Configuration -> types -> feedback item types:

container types	feedback items types	product items types	pmo items types	user/customer types	
VISIBLE	ICON	TYPE	LIFECYCLE STATUS	DEFAULT LIFECYCLE STATUS	CUSTOMER PORTAL OPTIONS
<input checked="" type="checkbox"/>		ticket	manage lifecycle status	<input type="checkbox"/> Open	<input checked="" type="checkbox"/>
<input type="checkbox"/>		question	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		problem	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		compliment	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb5	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb6	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb7	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		epic	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb9	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb10	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>

2. [To configure an item type, otherwise skip to step 3] Choose any of the types that don't have the visible check-box checked, check the box to make it visible, enter "epic" for the type name

<input type="checkbox"/>		compliment	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb5	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb6	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb7	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		epic	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb9	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb10	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>

3. [To configure a new lifecycle status, otherwise skip to step 4] Select the type of items that you want to use to initiate a push (in our case "epic") and click on the "manage lifecycle status" button. Enter "SYNC TO TFS" and click the "add" button.



For the new Lifecycle status choose the state “in progress”:



- Remember the item type name and the lifecycle status that you chose or created. You will need to type them in a case-sensitive way (Epic is different from ePIC) in Zapier.

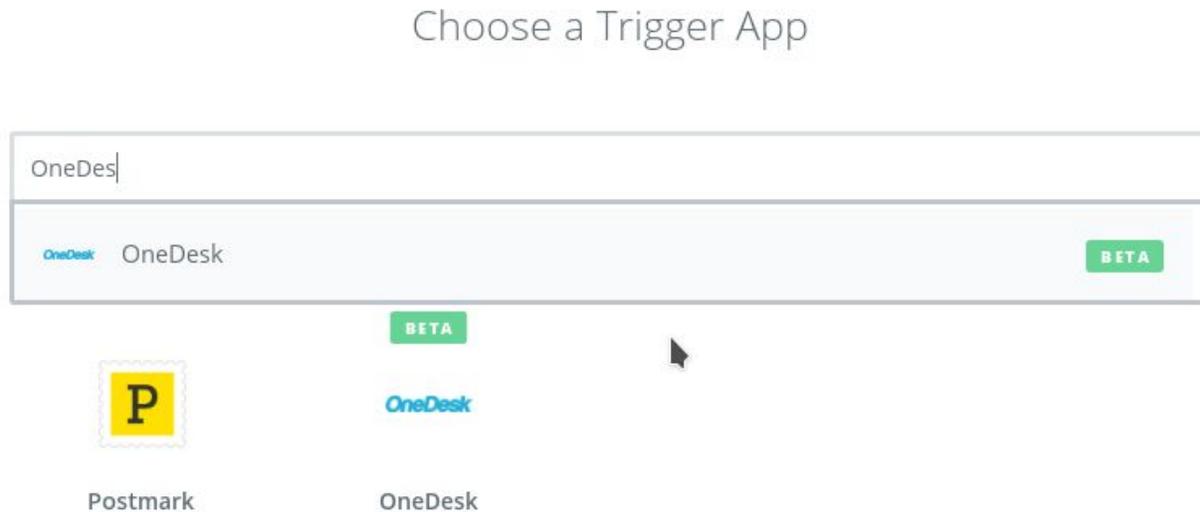
## 1. ZAP1 - Initial push from OneDesk to TFS

The purpose of this ZAP is to push to TFS only the items of a specific type(s) and only when they reach a certain lifecycle status(es). This enables you to do all your planning / approval flow in OneDesk and push the storied (epics) only when you are ready to be developed.

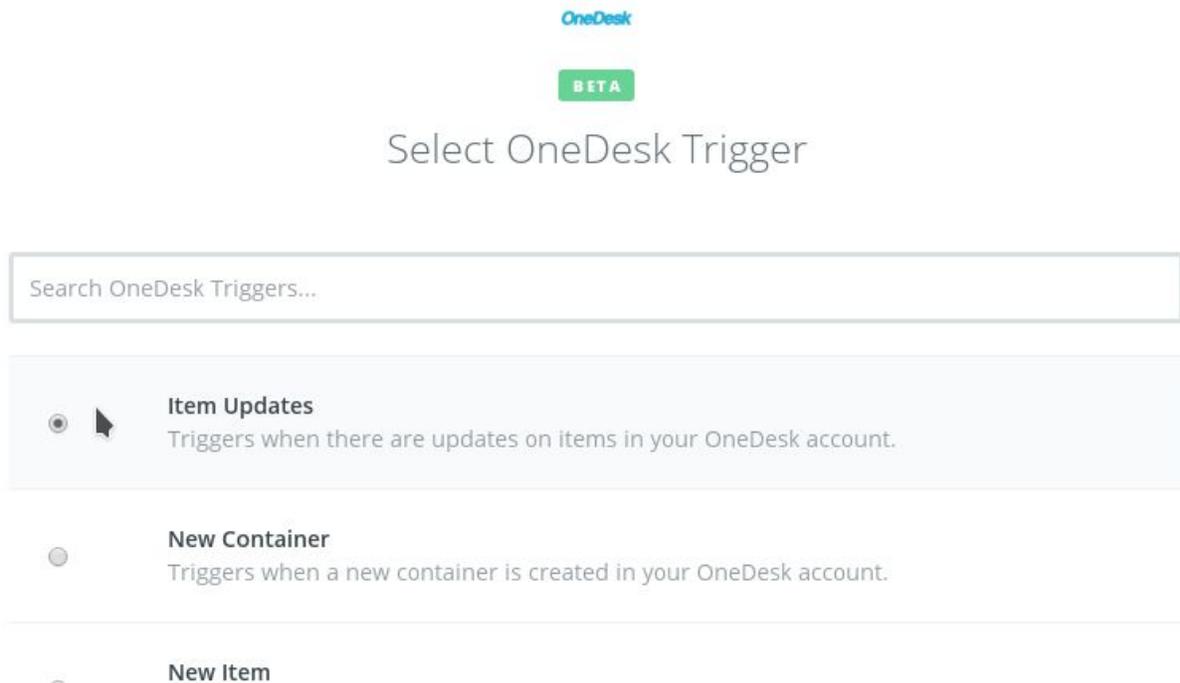
Once an item is pushed to TFS all further updates (either in OneDesk or in TFS) on selected properties will be synchronized to the other system.

- 1.1. In your Zapier account click on “Make A ZAP” button.

- 1.2. Type “OneDesk” in the search fields to locate the OneDesk application, or select the OneDesk application from the list of applications below the search box:



- 1.3. Select “Item Updates” Trigger from the list of triggers and click Save + Continue:



- 1.4. Click on the Connect a New Account and fill-in the credentials for your OneDesk integration user. You need to have a dedicated integration user with administrative privileges. This user SHOULD ONLY be used for integrations,

otherwise it will not detect all the changes in your OneDesk account.



## Allow Zapier access to your OneDesk account?

Email (required)

Password (required)

Yes, continue

- 1.5. On the set up OneDesk item update select “LifeCycle Status” and click continue.

OneDesk  
BETA

### Set up OneDesk item update

Updates on (required)  
Triggers on updates on any of the following fields.

LifeCycle Status	▼	-
Q search...		
+		
Integration Custom Field		
Name		
Priority		
Agile Points		
Description		
Container		
Requester		
LifeCycle Status		
Item Type		
Percent Complete		
Use a Custom Value		
Clear Current Choice		

Continue

- 1.6. Go to your OneDesk account and update the LifeCycle Status of a work item. Come back to Zapier and click “Fetch & Continue”. If the test is successful you can click “Continue”. Otherwise please double-check that the account that performed the LifeCycle Status change in OneDesk is DIFFERENT from the user configured in Zapier.
- 1.7. Click on the plus sign and add a new action, pick OneDesk from the list of “your apps”, select “Find WorkItem” from the list of actions and select the same account you have configured for the updates trigger
- 1.8. Fill-Up the configuration form for the search for OneDesk WorkItem likes this:
- 1.8.1. Search By -> “Item Id”
  - 1.8.2. Search Operation -> “Is”



1.8.3. Search Criteria -> click on the “Item Id” and select “Item Updates” -> Item Id

## Search for OneDesk Workitem

**\* Search By (required)**

Search items by author, container or custom field

Item Id

**\* Search Operation (required)**

Search operation (is / is not / is not empty).

Is

**\* Search Criteria (optional)**

Search criteria(s) joined by OR.

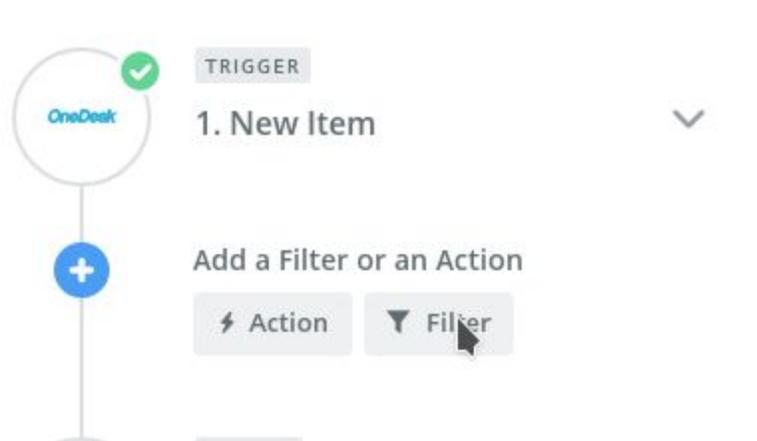
\* Step 1 Item Id



 Refresh Fields

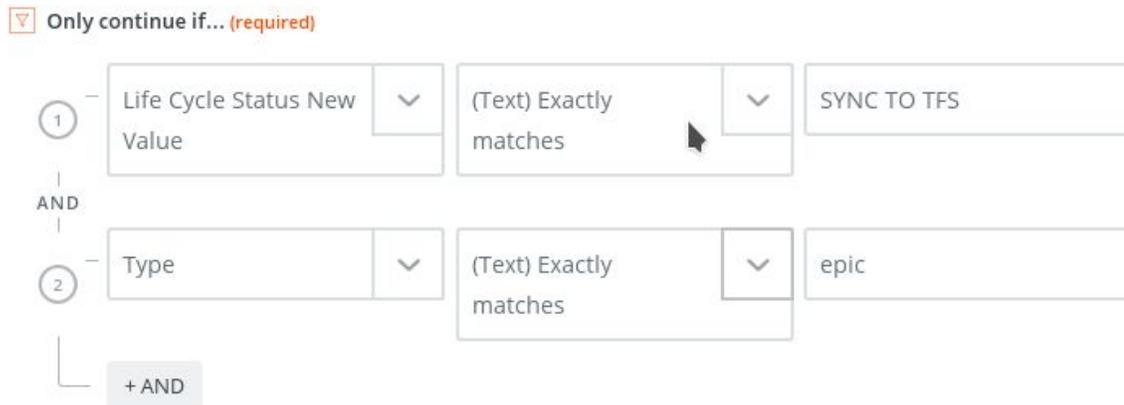
Conti

1.9. Click on the (+) between “Trigger” and “Action” on the left side to add a Filter.



1.10. Select “Only continue if...” and add the following conditions:

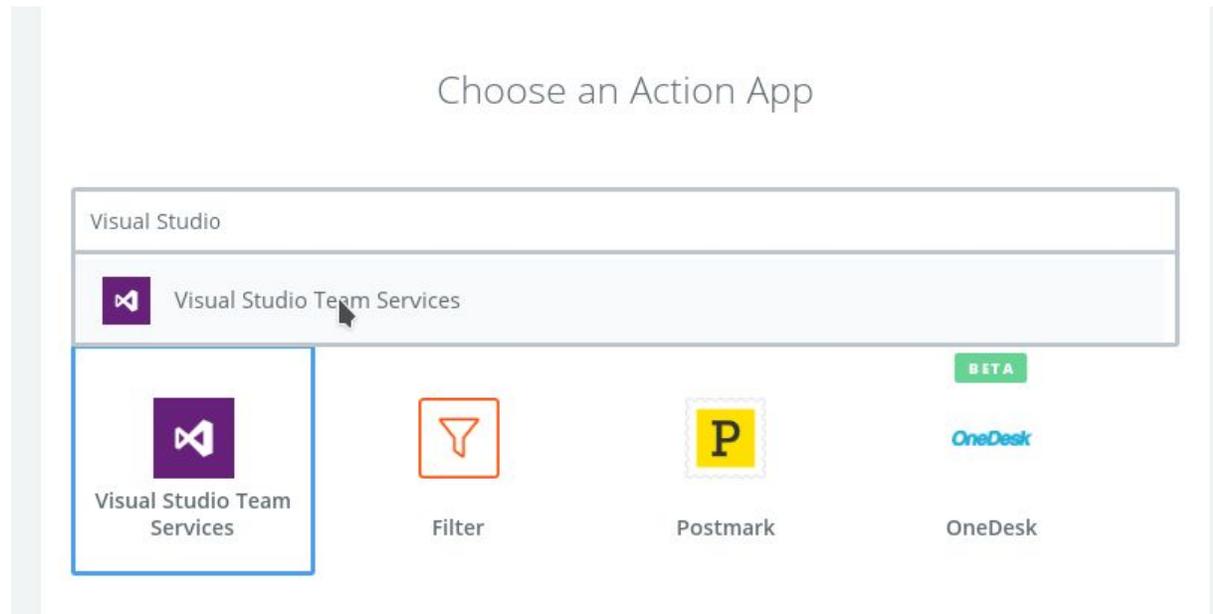
- 1.10.1. **Type of the item (TEXT) Exactly matches “epic”** (or other type that you chose during the Optional Configuration step in your OneDesk account)
- 1.10.2. **LifeCycle Status New Value (Text) Exactly matches “SYNC TO TFS”** (or any other type that you chose during the Optional Configuration step in your OneDesk account)



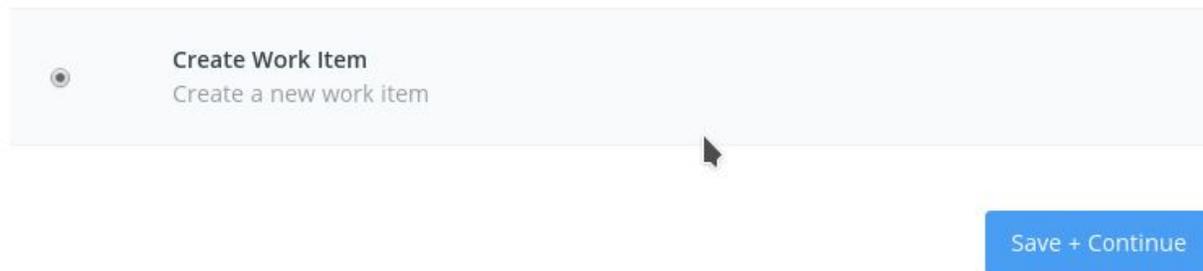
1.11. Click on Continue, then test the filter. If it fails please double check that the item Type and the LifeCycle Status values are correctly entered.

1.12. Click Continue -> Click on the plus button to add an new action step

- 1.13. On the action step Type “Visual Studio Team Services”, or select it directly from the list of “your apps”.



- 1.14. Select “Create Work Item” and click “Save + Continue”



- 1.15. Select an account and click “Save + Continue”. If you don’t have an account already added to Zapier please click “Connect a New Account” button.
- 1.16. Set up the Visual Studio Team Services Work Item
- 1.16.1. Pick the project where you’d like the item to be created
  - 1.16.2. Decide on the type of Work Item that you want to be created (eg: Epic)
  - 1.16.3. For the Title click on the Insert Fields button and choose Find Work Item -> Item Name. Prepend the Item Name with the id of the item in OneDesk.
  - 1.16.4. For the Description click on the Insert Fields button and choose Find Work Item -> Description. Here you can also put more useful information

(ex: the author of the change that triggered the creation, etc etc)

**Type (required)**

Work item type

**Title (required)**

Work item title

**Area (optional)**

The area of the product with which this work item is associated

**Iteration (optional)**

The iteration within which this work item will be associated

**Assigned To (optional)**

The person currently owning the work item

**Description (optional)**

Work item description

- 1.17. Click "Create & Continue" and then click "Add Step" -> Select "OneDesk" from "Your Apps", click on "show less common options" -> pick "Update Item" -> click

“Save + Continue”, select the same account that you selected for the trigger -> “Save + Continue”

1.18. Set up OneDesk Item Update:

- 1.18.1. For “Item Id” click “Use a Custom Value” and for the “Custom Value for Item Id ID” click on the Insert Fields button and select “Item Updates - Item Id”
- 1.18.2. In the custom fields put “INTEGRATION\_CUSTOM\_FIELD” and add SYNCed TO TFS” or any other status that would help you identify that the item has been pushed to TFS

\* **Item Id (required)**

The ID of the item to be updated.

Use a Custom Value

**Custom Value for Item Id ID (required)**

Provide the Item Id ID, not the Fancy Name here.

\* Step 1 **Item Id**

\* **Custom Field(s) (optional)**

The custom fields to be updated.

INTEGRATION\_CUSTOM\_F

SYNCed TO TFS



1.19. Click Continue -> Finish -> and name your ZAP and turn it on.

## 2. ZAP2 - New Comments in TFS sync back to OneDesk

The purpose of this ZAP is to retrieve new comments on items in TFS that are linked with items in OneDesk and add the comment to the OneDesk Item.

1. In your Zapier account click on “Make A ZAP” button -> Select “Visual Studio Team Services” -> pick “New Work Item Comment” -> Select your account .
2. On the setup options screen choose:
  - 2.1. The Project that this ZAP monitors

- 2.2. The String that the comment needs to contain in order for the comment to be synced back to OneDesk (ex: “[To OD]” or just a simple space if you want all the comments to be synced back)
- 2.3. Press Continue -> Connect & Continue
3. Login into your Visual Studio Online and add a new comment on an item that was synced from OD -> Once the step succeeds click “Continue”
4. On the Action setup select “Formatter By Zapier” -> Text :
  - 4.1. Select the “Extract Number” for the Transform
  - 4.2. Select Step1 -> Resource Fields System. Title for the Input

The screenshot shows the configuration for a Zapier Transform step. At the top, there is a section titled "Transform (required)" with a red icon. Below this is a text input field containing the text "Extract Number". Underneath the input field is a grey box with the instruction "Find and copy a number in text." and a mouse cursor pointing at it. Below this is another section titled "Input (optional)" with a red icon. Underneath is the text "Text you would like to find and copy a number from." and a dropdown menu. The dropdown menu is open, showing "Step 1 Resource Fields System.Title" as the selected option.

- 4.3. Click “Continue” -> “Add a step”
5. Choose “OneDesk” as the Action App -> click “show less common options” -> “Create Comment” -> Save + Continue
6. Select your OneDesk account -> Save+Continue
7. Setup the OneDesk Comment:
  - 7.1. Item Id -> “Use a Custom Value”
  - 7.2. Custom Value for Item ID -> Step 2- Resource Fields System.title
  - 7.3. Post Type -> Discussion Post (or choose based on your needs)

#### 7.4. Comment -> Step 1 Message Text

 **Item ID (required)** 1 2 3

ID of the work item to post a comment on

Use a Custom Value

**Custom Value for Item ID ID (required)**

Provide the Item ID ID, not the Fancy Name here.

 Step 2 Resource Fields System.title

 **Post Type (required)**

Comment type

DISCUSSION POST

 **Comment (required)**

Comment content

 Step 1 Message Text

#### 7.5. Continue -> "Create & Continue"

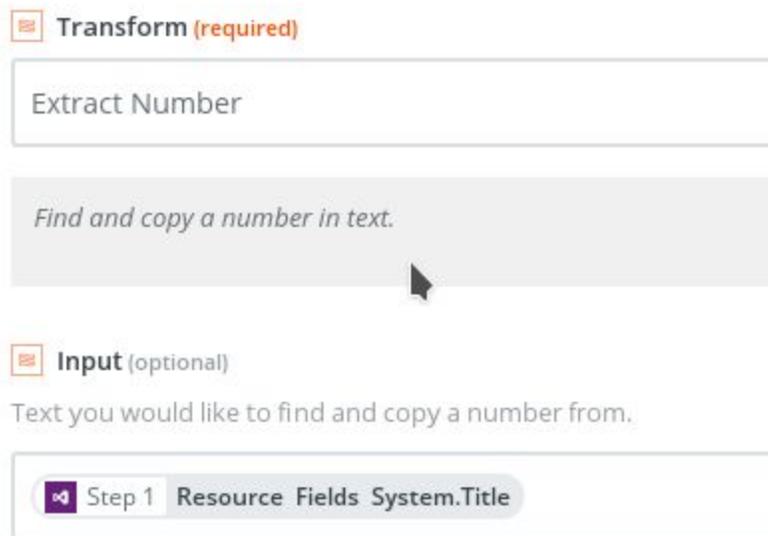
8. "Finish" -> Name your Zap so that you recognize it -> Turn your ZAP on

### 3. ZAP3 - Items Updates in TFS get synced back to OneDesk

The purpose of this ZAP is to retrieve updates on items in TFS that are linked with items in OneDesk and apply the updates to the OneDesk Item.

1. In your Zapier account click on "Make A ZAP" button -> Select "Visual Studio Team Services" -> pick "Update Work Item" -> Select your account .
2. Setup the Work Item updates:
  - 2.1. Project -> Select the project that you want to monitor for updates

- 2.2. [OPTIONAL] Work Item Type -> select an work item type that you want to filter for
- 2.3. Continue -> Connect & Continue
3. Connect to your TFS and update the Description of an Item -> Continue
4. On the Action setup select "Formatter By Zapier" -> Text :
  - 4.1. Select the "Extract Number" for the Transform
  - 4.2. Select Step1 -> Resource Fields System. Title for the Input



The screenshot shows the configuration for a Zapier Transform step. At the top, there is a section titled "Transform (required)" with a red icon. Below this is a dropdown menu with "Extract Number" selected. Underneath is a grey box containing the instruction "Find and copy a number in text." with a mouse cursor pointing to it. Below that is an "Input (optional)" section with a red icon and the text "Text you would like to find and copy a number from." Below this is a text input field containing "Step 1 Resource Fields System.Title".

- 4.3. Click "Continue" -> "Add a step"
5. Choose "OneDesk" as the Action App -> click "show less common options" -> "Update Item" -> Save + Continue
6. Select your OneDesk account -> Save+Continue
7. Setup the OneDesk Item Update:
  - 7.1. Item Id -> "Use a Custom Value"
  - 7.2. Custom Value for Item ID -> Step 2- Resource Fields System.title
  - 7.3. Description -> Step 1 Resource Fields System.Description
  - 7.4. Continue -> Create & Continue
8. "Finish" -> Name your Zap so that you recognize it -> Turn your ZAP on