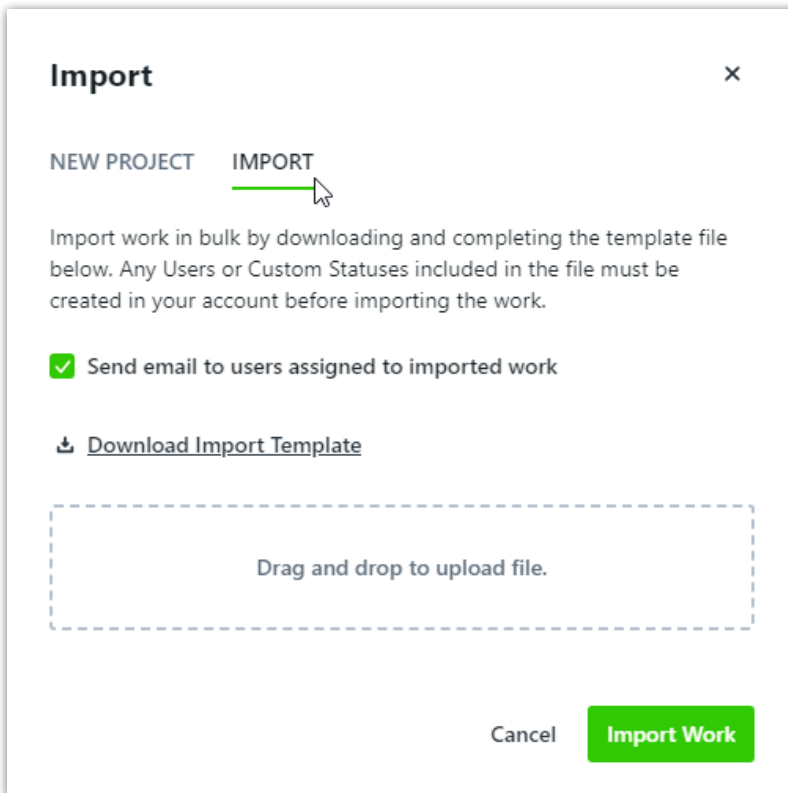# Importing Work Items

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Planning out your team's workload for next quarter? Have a lot of work that needs to be done on a regular basis? Bringing work in from another system? Importing Projects and Tasks is a great way to save time and create work items in bulk.

Getting Started

To begin the import process, navigate to the **Projects** icon from the left-navigation list. Click **Add Project** in the top right. From the "**Create Projects**" modal, select the **IMPORT** tab.

Click **Download Project Import Template** to get a CSV copy of the template to fill out. The template will include the following fields, as well as a formatting guideline for each:

Field Name	Sample Formatting
Work Item Name*	*Spring Sale*
Work Item Type*	*Project*
Work Item Description	*Annual Spring Sale*
Project Owner	*janedoe@company.com,johndoe@company.com*
Project ID	*12345*
Assigned Users	*janedoe@company.com,johndoe@company.com*
Work Item Status	*Completed*
Started	*9/12/2018 3:04:00 PM*
Due	*10/12/2018 10:00:00 PM*

Completed	*10/13/2018 9:00:00 PM*
Tags	*Tag 1,Tag 2*
LOE	*1*
Archived Status	*Not Archived*
Custom Field (Field Name Here)	*Web*
Use Project Template	*Y*
Project Template Name	*True Soap Project Template*
Priority	*Rush*

> ℹ️
> - *Work Item Name and Work Item Type are the only required fields.
> - For fields with multiple values (Assigned Users, Tags), values must be comma-separated.
> - Use Project IDs to associate Tasks to a Project with a matching Project ID. You can create your own Project IDs using any unique identifier. The Project ID itself will not be visible in Workflow once the work is created.
> - The import limit is 500,000 rows of data.

As you prepare to import your Projects or Tasks, these are the three most important points to keep in mind to ensure your import runs smoothly:

- All users must already exist in your account
- All custom fields, dropdown custom field values, work statuses, and priorities must already exist in your account
- Start dates must be before Due or Completed dates

Once you've got everything ready to go, you can upload your CSV to the import modal and click **Import Work**. By default, the "**Send email to users assigned to import work**" option will be checked, but if you do **not** want those users to receive email notifications for these Projects or Tasks, uncheck the box before clicking **Import Work**.

Troubleshooting Your Import

If there are any errors preventing your import from successfully running, you'll be notified and prompted to download a new file explaining the errors. You'll see the same import template with a new column called "Import Errors" outlining which rows have errors.

> ⓘ Multiple errors in one cell are separated by a line break; adjust the cell height or enable text-wrapping to see the full error message.

Here are some common errors and how to fix them:

Error Message	Error Cause and Solution
Project Owner/Assigned User [Email Address] is not in the account	The email address in either the Project Owner or Assigned User field does not match an existing user in the Workflow account; invite that user (https://guide.lytho.com/help/managing-users#adding-new-users) to the account, replace them with an existing user, or remove them from the import template.

Error Message		Error Cause and Solution
Project Owner/Assigned User [Email Address] cannot be assigned to Projects/Tasks.		The email address in either the Project Owner or Assigned User field belongs to a Stakeholder and cannot be assigned to Projects/Tasks; update the user to a Admin/Team Member, replace them with an existing user, or remove them from the Project/Task.
The account is missing the following Custom Field: [Custom Field Name]		The entered custom field does not exist in the Workflow account; add it to the account (https://guide.lytho.com/help/managing-custom-fields#creating-custom-fields) or remove the column from the import template.
[Custom Field Name] value of [Custom Field Value] is not valid for this Task		Custom fields cannot be applied to Tasks; remove the custom field value from the Task.
[Custom Field Name] must be a valid number		The custom field type is Number but the entered value was not a number; enter a numerical value or remove the value from the Project.
[Custom Field Name] must be a date in the form of MM/DD/YYYY		The custom field type is Date but the entered value was not in a compatible format; enter the date as MM/DD/YYYY.
[Date Value] is not a valid date		Either the Started, Due, or Completed date is formatted incorrectly; enter the date as MM/DD/YYYY.
Start cannot be after Due/Completed		The Started date and time must be before the Due and Completed dates and times.
Work Item Status: [Work Item Status Value] is not in the account		The entered work item status does not exist in the Workflow account; add that status (https://guide.lytho.com/help/custom-work-statuses#adding-a-new-custom-status) in the account, or change the value to an existing Workflow status.

Error Message	Error Cause and Solution
Work Item Status: [Work Item Status Value] is not valid for Project/Tasks.	The entered Project/Task exists in the account, but has not been made applicable for the given Work Item Type. Change the status applicable settings (https://guide.lytho.com/help/custom-work-statuses#editing-an-existing-custom-status) on the value or change the value to an applicable Workflow status.
Priority [Priority Name] is not in the account.	The entered priority does not exist in the Workflow account; add it to the account (https://guide.lytho.com/help/resource-management-priorities) or remove the value from the import template.
Project Template [Project Template Name] does not exist in the account.	The entered Project Template does not exist in the Workflow account; add it to the account (https://guide.lytho.com/help/project-templates) or remove the value from the import template.
Project ID [Project ID Value] appears multiple times in the file.	A unique Project ID can only appear on one item given the "Project" value in the Work Item Type field. It can exist on many "Task" value items. Find the additional Projects with the duplicate Project ID and change the value to something unique.
[Field Name] must be less than [Number Count] characters	The value of the noted field exceeds the field's maximum character limit (https://guide.lytho.com/help/what-character-limits-do-different-fields-have). Reduce the character count below the given value.

If you need assistance troubleshooting your import file, reach out to our Support Team (https://support.lytho.com/support/tickets/new)!

Have a friend who could benefit from Lytho? Refer them and get a $200 gift card!
(https://www.lytho.com/share-the-lytho-love/)