

# Solution Note - Importing Tickets

## Converting an Excel file into Touchplan's ticket import format for upload

### Problem Statement

Users want to transfer the tickets created in a separate tool or managed in spreadsheets into Touchplan.

### Solution

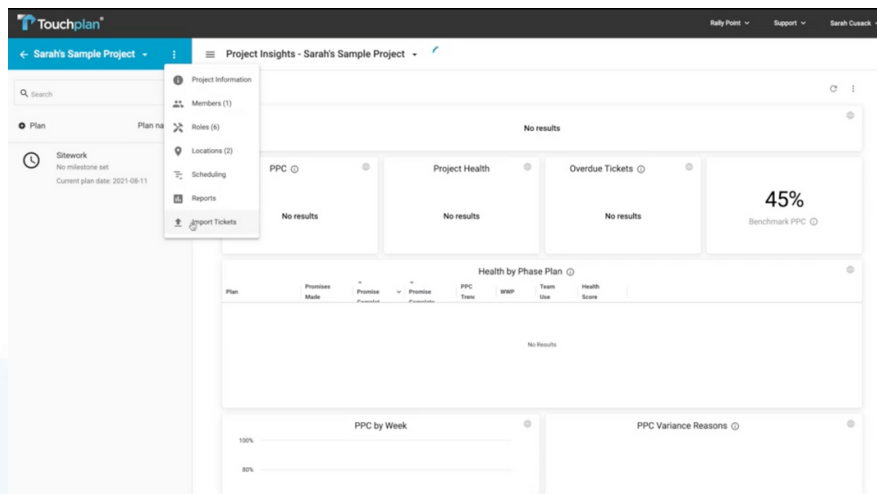
Tasks, constraints, and milestones can be created automatically using ticket import and placed on both the active- and pull-side.

### Related Materials

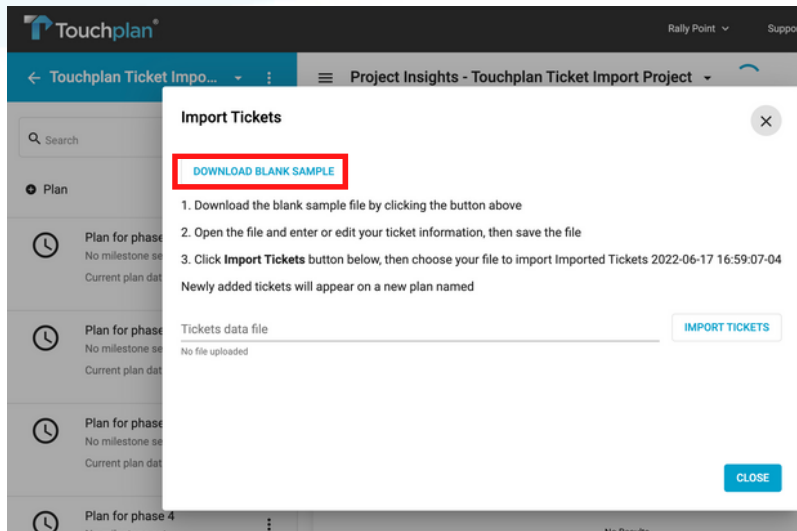
Object	Link	Description
FAQ	<a href="#">Ticket Import Video</a>	How to Use Ticket Import

### Step-by-step instructions

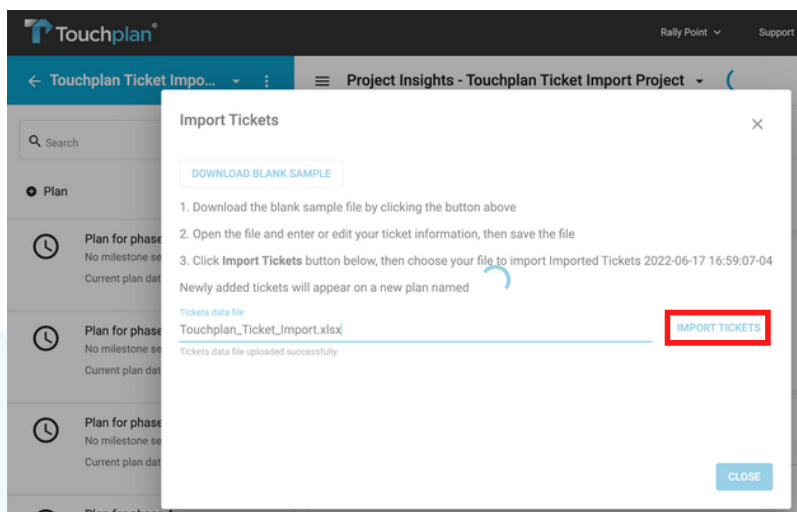
1. Open the project where the tickets will be imported



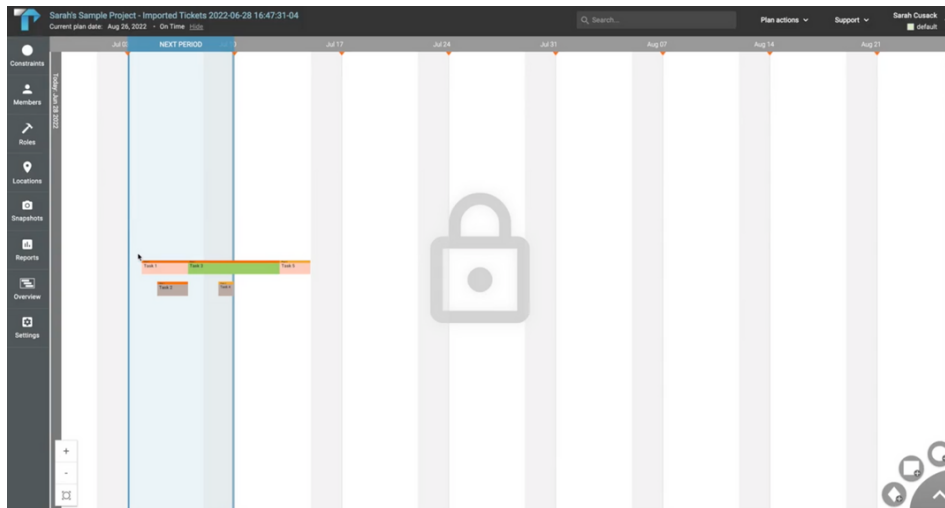
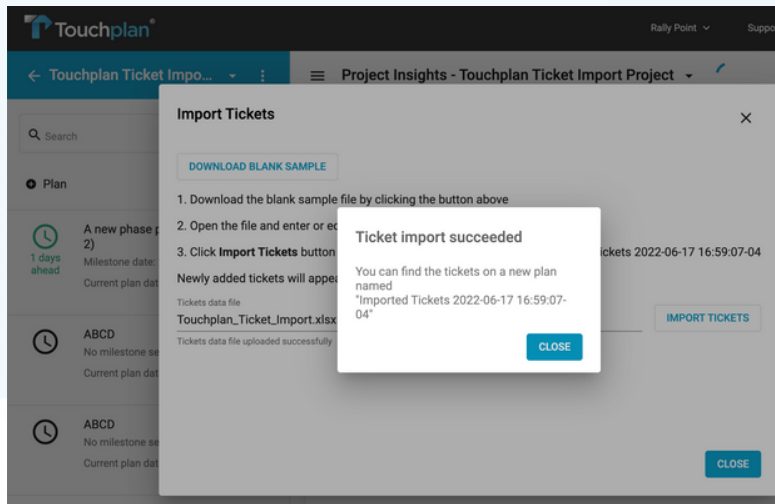
2. Select the project “overflow menu”
  - a. Select to import tickets
3. Download the blank sample file
  - a. This sample file will be where the information about your tickets will be placed
4. Copy the data into the sample file on the appropriate sheet (**tickets, constraints, milestones**)
5. The additional columns that can be filled out on the Touchplan ticket import template will provide more information to the tickets once they are imported
  - a. Ticket position is a required field that will determine if tickets are created as look-ahead-tickets (**active**) or as pull-tickets (**pull**)



6. Once the information has been entered into the Touchplan ticket import spreadsheet, return to the **Import Ticket** menu in Touchplan
7. Select the file Touchplan Ticket Import template with the P6 data copied onto it and choose to import it



8. The tickets will be created into a new plan in the project



**Note: The data in the role and location columns of the Touchplan ticket import template must match the roles and locations that are defined in the Touchplan project itself**

### **Help is available**

For help with creating ticket imports, visit the FAQ here:

[Use Ticket Import | Touchplan.io Help Center](#)

For help exporting a plan or project CSV, visit the FAQ here:

[Export Reports | Touchplan.io Help Center](#)

For live help, click on the “Support” drop down in the top right corner of your planning screen and click the “Live Chat” button. This will connect you to a CS representative who will be able to answer any questions that you may have.

### **Issues, concerns, defects in this note?**

We welcome any feedback you may have on this note to help us continually improve our materials and provide the best support that we can to our customers.

Please send any comments, suggestions, or reports of errors to the CS Live Chat