Creating issues using the CSV importer

There are two steps to using the CSV importer, and an optional third step:

Step 1.Preparing your CSV file;

Step 2.Running the CSV import wizard;

Step 3.Saving your configuration for future use;

## Step1. Preparing your CSV file

## CSV file requirements

In addition to being 'well-formed', CSV files have the following requirements.

1.Each CSV file must possess a heading row with a Summary column;

2.Commas (as column/field separators) cannot be omitted;

For example, this is valid:

Summary, Assignee, Reporter, Issue Type, Description, Priority

"Test issue", admin, admin, 1, ,

### Encapsulating JIRA data structure in your CSV file

### 1.capturing data that spans multiple lines;

For example, this is valid:

Summary, Description, Status

"Login fails", "This is on

a new line", Open

2. Treating special characters literally

To treat a double quote mark literally, you can 'escape' them with another double quote mark character. Hence, the CSV value:

"Clicking the ""Add"" button results in a page not found error"  
once imported, will be stored in JIRA as:

Clicking the "Add" button results in a page not found error

3.Aggregating multiple values into single JIRA fields(Will not allow to import multiple which only support a single value)

IssueType, Summary, FixVersion, FixVersion, FixVersion, Component, Component

bug, "First issue", v1, , , Component1,

bug, "Second issue", v2, , , Component1, Component2

bug, "Third issue", v1, v2, v3, Component1,

#### 4. Importing attachments

Assignee, Summary, Description, Attachment, Comment

Admin, "Issue demonstrating the CSV attachment import", "Please check the attached image below.", "https://jira-server:8080/secure/attachment/image-name.png", "01/01/2012 10:10;Admin; This comment works"

Admin, "CSV attachment import with timestamp,author and filename", "Please check the attached image below.", "01/01/2012 13:10;Admin;image.png;file://image-name.png", "01/01/2012 10:10;Admin; This comment works"

#### 5. Importing issues into multiple JIRA projects

Your CSV file requires two additional columns whose headings should be named similarly to **Project Name** and **Project Key**. The project name and key data is the minimum JIRA project data required for importing issues from a CSV file into specific JIRA projects.

IssueType, Summary, Project Name, Project Key

bug, "First issue", Sample, SAMP

bug, "Second issue", Sample, SAMP

task, "Third issue", Example, EXAM

6.Importing worklog entries

Your CSV file can contain worklog entries. For example:

Summary,Worklog

Only time spent (one hour),3600

With a date and an author,2012-02-10 12:30:10;wseliga;120

With an additional comment,Testing took me 3 days;2012-02-10 12:30:10;wseliga;259200

7.Importing to multi select custom fields

Your CSV file can contain multiple entries for the one Multi Select Custom Field. For example:

Summary,Multi Select,Multi Select,Multi Select

Sample issue,Value 1,Value 2,Value 3

8.Import cascading choice custom fields

You can import values to a cascading choice custom field using the following syntax:

Summary, My Cascading Custom Field

Example Summary, Parent Value -> Child Value

The '->' separator allows you to import the hierarchy.

## Step2. Running the CSV file import wizard

**Before you begin:** If your JIRA installation has existing data — [Back up](https://confluence.atlassian.com/jira064/backing-up-data-720412043.html) your existing JIRA data.

1. Select **Issues > Import Issues from CSV**to open the **Bulk Create Setup** page. (If you do not have the option **Import issues from CSV**, your JIRA Admin must update the JIRA Importers plugin to version 6.2.3 or above.)
2. On the **Setup** page, select your **CSV Source File**.  
   Leave the **Use an existing configuration file** check box cleared if you do not have a configuration file or if you want to create a new configuration file. Configuration files specify a mapping between column names in your CSV file's header row and fields in your JIRA installation.

2.1.If you select this option, you will be asked to specify an **Existing Configuration File**.

2.2.If you do not select this option, then at the end of the CSV file import wizard, JIRA will ask you if you want create a configuration file which you can use for subsequent CSV imports.

3. Click the **Next** button to proceed to the **Settings** step of the CSV file import wizard. Complete the required fields.

* If your CSV file uses a different separator character other than a comma, specify that character in the **CSV Delimiter** field. If the separator is a 'Tab', this can be entered using the format '**/t**'.
* 4. Click the **Next** button to proceed to the **Map fields** step of the CSV file import wizard. Here, you can map the column headers of your CSV file to the fields in your selected JIRA project. If you want to select specific JIRA field values to map specific CSV values to, tick the check-box for **Map field value**.
* **Note:**You must map a CSV field to the JIRA summary field. This ensures the issues created have a summary.
* **5.** Click the **Next** button to proceed to the **Map values** step of the CSV file import wizard. On this step of the import wizard you can select which specific CSV field values you want to map to which specific JIRA field value. For example, your issue types you may have a CSV field value of "Feature Request", which you may want to map to the JIRA issue type field value "New Feature".

5.1.Any fields whose **Map field value** check boxes were selected in the previous step of the CSV file import wizard will be presented on this page;

5.2. Leave a field cleared or clear any content within it if you wish to import the value 'as is';

5.3.Automatically map imported usernames from the CSV file to(lowercase) JIRA usernames when do not select the **Map field value** check box;

6. Click the **Validate** button and JIRA will validate your import and inform you of any expected errors or warnings.

7. Click the **Begin Import** button when you are ready to begin importing your CSV data into JIRA. The importer will display updates as the import progresses, then a success message when the import is complete.

* 7.1.If you experience problems with the import (or you are curious), click the **download a detailed log** link to reveal detailed information about the CSV file import process;
* 7.2. If you need to import another CSV file with the same (or similar) settings to what you used through this procedure, click the **save the configuration** link to download a CSV configuration file, which you can use at the first step of the CSV file import wizard;

**Congratulations, you have successfully imported your CSV data into JIRA!**

## Tips for importing CSV data into JIRA fields

Below are some helpful tips when importing data from your CSV file into specific JIRA fields:

|  |  |
| --- | --- |
| **JIRA Field** | **Import Notes** |
| Project | CSV data is imported on a per-project basis. You can either specify an existing JIRA project(s) as the target, or the importer will automatically create a new project(s) for you at time of import. |
| Summary | This is the only required field. |
| Component(s) | You can import issues with multiple components by entering each component in a separate column. |
| Affects Version(s) | You can import issues with multiple 'Affects Versions' by entering each version in a separate column. |
| Fix Version(s) | You can import issues with multiple 'Fix Versions' by entering each version in a separate column. |
| Comment Body | You can import issues with multiple comments by entering each comment in a separate column. |
| Due Date | Please use the date format specified on the second step of the CSV import wizard. |
| Issue Type | If not specified in your CSV file, imported issues will be given the default (i.e. first) Issue Type as specified in your JIRA system [Defining 'Issue Type' Field Values](https://confluence.atlassian.com/jira064/defining-issue-type-field-values-720412113.html). You can also create new JIRA values on-the-fly during the import process. |
| Labels | You can import issues with multiple labels by entering each label in a separate column. |
| Priority | If not specified in your CSV file, imported issues will be given the default (i.e. first) Priority as specified in your JIRA system [Defining 'Priority' Field Values](https://confluence.atlassian.com/jira064/defining-priority-field-values-720412109.html). You can also create new JIRA values on-the-fly during the import process. |
| Original Estimate | The value of this field needs to be specified as number of seconds. |
| Remaining Estimate | The value of this field needs to be specified as number of seconds. |
| Time Spent | The value of this field needs to be specified as number of seconds. |
| Users | You can choose to have the importer automatically create JIRA users for any values of the Assignee or Reporter field.   * Users will be created as active accounts in JIRA. Users will need to get their passwords emailed to them the first time they log into JIRA. * Users with no real name will get the portion of their email address (login name) before the "@" character as their Full Name in JIRA. * If you are using [External User Management](https://confluence.atlassian.com/jira064/configuring-jira-options-720411998.html#ConfiguringJIRAOptions-options), the import process will not be able to create JIRA users; instead, the importer will give you a list of any new users that need to be created. You will need to create the users in your external user repository before commencing the import. * If you have a user-limited license (e.g. personal license), and the number of required users is larger than the limit, then the import will be stopped. A page will be displayed showing a list of users that can't be created. * If Assignee and Reporter are not mapped, then no usernames are created |
| Other fields | If you wish to import any other fields, you can choose to map them to specific [JIRA custom field(s)](https://confluence.atlassian.com/jira064/adding-a-custom-field-720412132.html). If your custom fields don't yet exist in JIRA, the importer can automatically create them for you. If your custom field is a date field, please use the date format specified on the second step of the CSV import wizard. |