

Onboarding Team Members Project Template

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Lytho Workflow is unique in that it can help facilitate the adoption of both Workflow and the Digital Asset Manager. Use the Project import template below as a starting point for your own onboarding creation.

1. Download the relevant Project template here:

[Onboarding New Workflow Team Members Project Template.csv](#)

(<https://dyzz9obi78pm5.cloudfront.net/app/image/id/6246253007c6f811667b274d/n/onboarding-new-team-members-project-template.csv>)

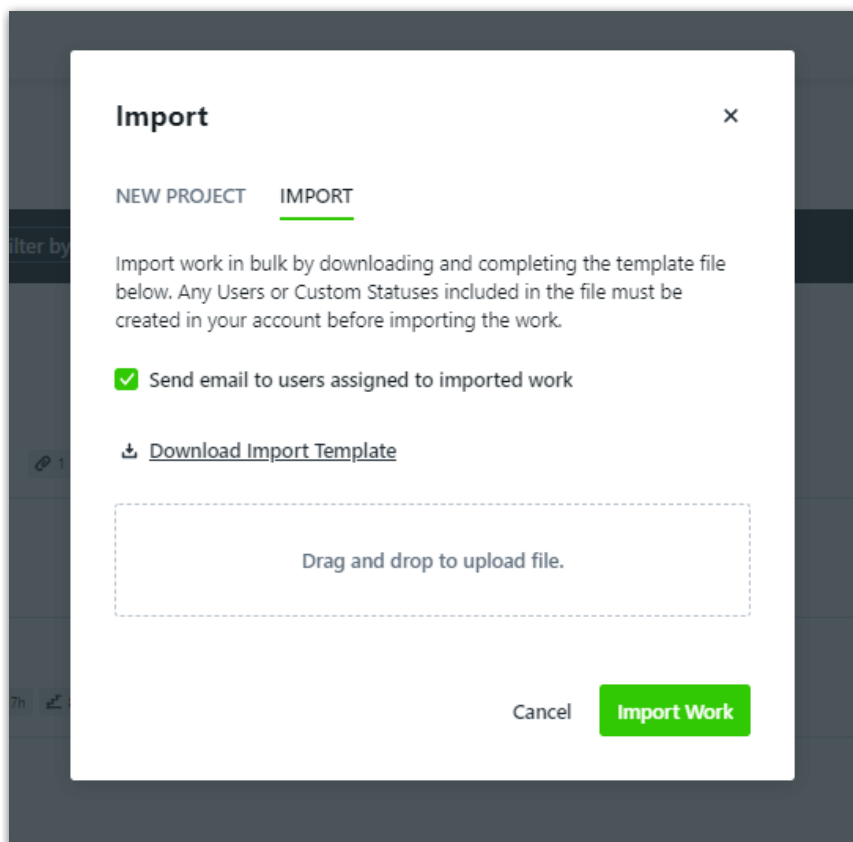
[Onboarding New DAM Team Members Project Template.csv](#)

(<https://dyzz9obi78pm5.cloudfront.net/app/image/id/659c48741ee2d3140e485284/n/dam-onboarding-campaign-import-rev-11-7-2023-2.csv>)



The above Workflow template uses the [work item status](https://guide.lytho.com/help/custom-work-statuses) "To Do" in the Work Item Status column. If you have deleted the To Do status from your Workflow account, please update the template with an [existing status](https://guide.lytho.com/help/custom-work-statuses).

2. Create a new Project and select the **IMPORT** Option. Place the downloaded spreadsheet into the specified file block and click **Import Work**.



Import ×

NEW PROJECT **IMPORT**

Import work in bulk by downloading and completing the template file below. Any Users or Custom Statuses included in the file must be created in your account before importing the work.

☒ Send email to users assigned to imported work

[Download Import Template](#)

Drag and drop to upload file.

Cancel **Import Work**

3. Now that your Project has been imported, you may want to move your Tasks into [work groups](https://guide-ignite.inmotionnow.com/help/work-groups) (<https://guide-ignite.inmotionnow.com/help/work-groups>) for easier digestion and instruction. We recommend the following:

Get to Know Lytho Workflow Using Common Steps

✓ Set a Due Date for this Project

15:26 WEBINAR

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15

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✓ Update the Project Status to In Progress

15:26 WEBINAR

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✓ Set a Start and Due Date for this Task

15:26 WEBINAR

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✓ Add Yourself as a Member of this Task

15:26 WEBINAR

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✓ Send this Proof to Yourself for Review

15:26 WEBINAR

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✓ Enter LOE for this Task

15:26 WEBINAR

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✓ Add a Tag to Indicate This is a "Digital" Task

15:26 WEBINAR

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✓ Add a Comment to this Task

15:26 WEBINAR

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✓ Attach a File to the Project

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✓ Update Task Statuses to Completed

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✓ Update this Project's Status to Completed

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Extra Credit!

✓ Create a Work Group

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✓ Create a Task Two Different Ways

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✓ Check the Activity to See the Project History

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✓ Drag & Drop to Rearrange Tasks

15:26 WEBINAR

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✓ Convert this Task to a Proof and Send for Review

15:26 WEBINAR

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Add a task...



Convert any Tasks (<https://guide.lytho.com/help/converting-a-task-to-a-proof>) that need to be a Proof! With the example above, the Task **Send this Proof to yourself for review** will need to be converted.

4. Convert your Project into a [Project Template](https://guide-ignite.inmotionnow.com/help/project-templates) (<https://guide-ignite.inmotionnow.com/help/project-templates>) so that you can easily access whenever a new Team Member joins your team.

Webinar: Start Learning Lytho Workflow

OVERVIEW

CALENDAR

Add Task

Add Proof

Add Group

Edit Blockers

Get to Know Lytho Workflow Using Common Steps

✓

Set a Due Date for this Project

To Do

WEBINAR

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✓

Update the Project Status to In Progress

To Do

WEBINAR

...

✓

Set a Start and Due Date for this Task

To Do

WEBINAR

...

✓

Add Yourself as a Member of this Task

To Do

WEBINAR

...

✓

Send this Proof to Yourself for Review

To Do

WEBINAR

...

✓

Enter LOE for this Task

To Do

WEBINAR

...

✓

Add a Tag to Indicate This is a "Digital" Task

To Do

WEBINAR

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DETAILS

FILES

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Project Number

33

Description

Add description...

Members

+

Priority

Add Priority

Start Date

Add Start Date

Due Date

Add Due Date

Tags

WEBINAR

Add tag...

Tracked Time

0h

To Do

Move to Campaign

Duplicate

Add Thumbnail

Publish as Template

Archive

Publish as Template

Delete

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