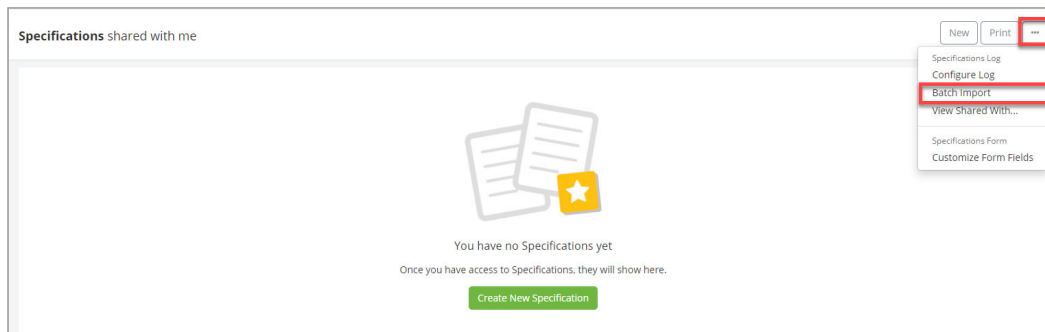


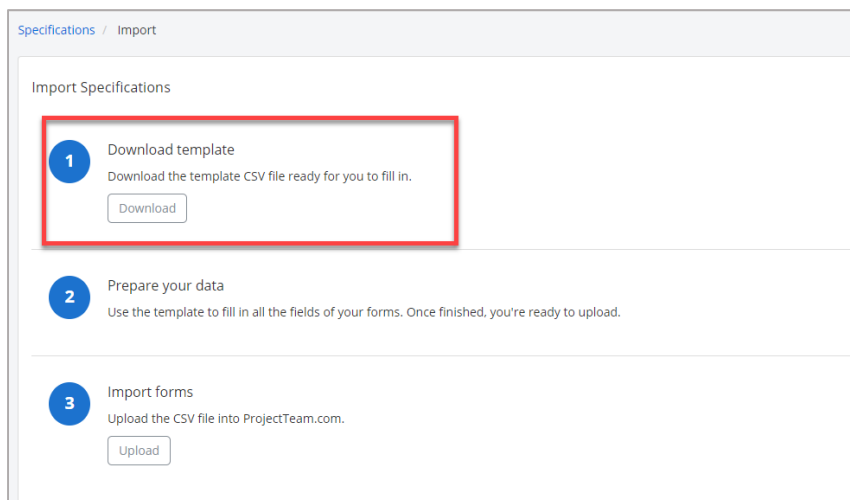
Batch Import

To quickly upload records into ProjectTeam each form type has a Batch Import feature.

1. From the log view on any form type click the **ellipsis** (three dots...) located on the right corner of the view and then click **Batch Import**.



2. The **Batch Import** pane opens to a 3 Step Wizard. Click the **Download** button to download the template CSV file.



3. Upon completion of download the file will appear at the bottom of your screen.

ProjectTeam TR001 ProjectTeam Training and Documentation Portal

Specifications / Import

Import Specifications

- 1** Download template
Download the template CSV file ready for you to fill in.
[Download](#)
- 2** Prepare your data
Use the template to fill in all the fields of your forms. Once finished, you're ready to upload.
- 3** Import forms
Upload the CSV file into ProjectTeam.com.
[Upload](#)

Specification_Proje...csv

4. **Open** the file and enter the applicable information to be imported. **Save** the file as a CSV format file.

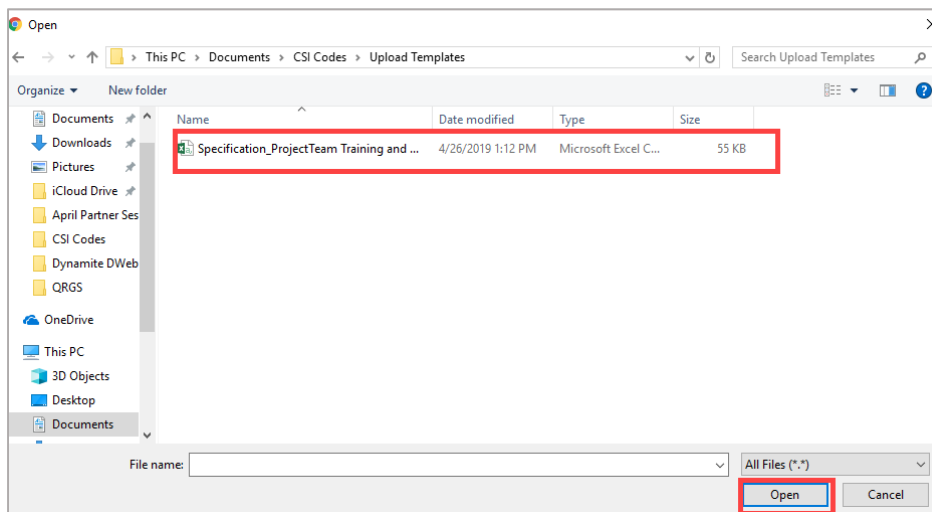
	A	B	C	D	E	F
1	Subject	Account Code	Original Budget Amount			
2	Project Executive	01-01000-L	45000			
3	Project Manager	01-01001-L	60000			
4	Field Engineer	01-01002-L	30000			
5	Superintendent	01-01003-L	75000			
6	Sitework	02-02000-S	50000			
7	Sidewalks	02-02001-S	15000			
8	Concrete	03-03000-S	150000			
9	Masonry	04-04000-S	250000			
10	Structural Steel	05-05000-S	125000			
11	Rough Carpentry	06-06000-S	35000			
12	Roofing	07-07000-S	225000			
13	Doors	08-08000-S	110000			
14	Windows	08-08001-S	95000			
15	Drywall	09-09000-S	100000			
16	Wallcoverings	09-09001-S	25000			
17	Carpeting	09-09002-S	150000			
18	Ceramic Tile Floors	09-09003-S	250000			
19	Elevator	14-14000-S	400000			
20	Plumbing	15-15000-S	175000			
21	HVAC	15-15001-S	275000			
22	Electrical	16-16000-S	300000			

5. Return to the form in ProjectTeam and open the batch import page outlined in steps 1 and 2. Click the **Upload** button to import the data contained in the file.


Import Specifications


- 1** Download template
Download the template CSV file ready for you to fill in.
- 2** Prepare your data
Use the template to fill in all the fields of your forms. Once finished, you're ready to upload.
- 3** Import forms
Upload the CSV file into ProjectTeam.com.


















6. Locate the template saved in step 4. Click the **template title** to select and click the **Open** button.



7. The data will import into your project. If any errors occur during the import you will be notified. The error report shows which rows in the spreadsheet have incorrect or missing information.
Note: If any errors occur the entire import is aborted and no records will import until all errors are corrected.
8. Upon successful import you can view the imported records in the log view.

Budget Items shared with me 

New Print 

<input type="checkbox"/>	Subject 	Account Code 	Original Budget Amount	Total Approved Budget Amendments	Revised Budget 	Approved 	Approved Date 	Created On 	Shared
<input type="checkbox"/>	Project Executive Monthly Auto Allowance	01-01000-M - Project Executive Auto Allowance	\$50,000.00	\$0.00	\$50,000.00	<input type="checkbox"/>		4/18/19 11:59 AM	 1 
<input type="checkbox"/>	Project Executive	01-01000-L - Project Executive	\$45,000.00	\$0.00	\$45,000.00	<input checked="" type="checkbox"/>	1/10/19	1/10/19 3:35 PM	 1 
<input type="checkbox"/>	Project Manager	01-01001-L - Project Manager	\$60,000.00	\$0.00	\$60,000.00	<input checked="" type="checkbox"/>	1/10/19	1/10/19 3:35 PM	 1 
<input type="checkbox"/>	Field Engineer	01-01002-L - Field Engineer	\$30,000.00	\$0.00	\$30,000.00	<input checked="" type="checkbox"/>	1/10/19	1/10/19 3:35 PM	 1 
<input type="checkbox"/>	Superintendent	01-01003-L - Superintendent	\$75,000.00	\$0.00	\$75,000.00	<input checked="" type="checkbox"/>	1/10/19	1/10/19 3:35 PM	 1 
<input type="checkbox"/>	Sitework	02-02000-S - Sitework	\$50,000.00	\$15,000.00	\$65,000.00	<input checked="" type="checkbox"/>	1/10/19	1/10/19 3:35 PM	 1 