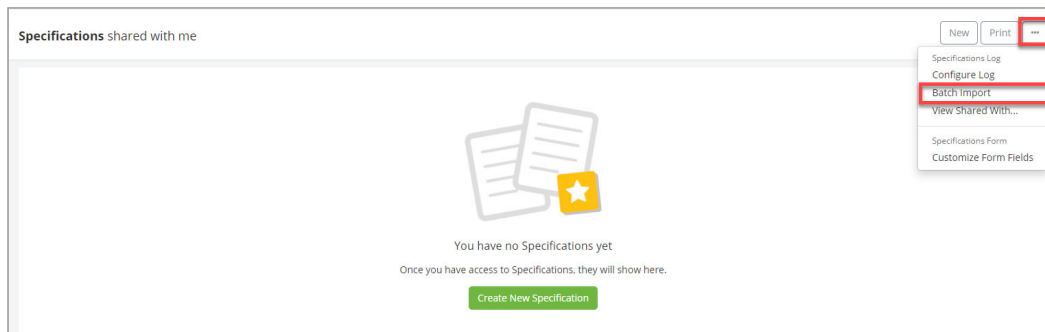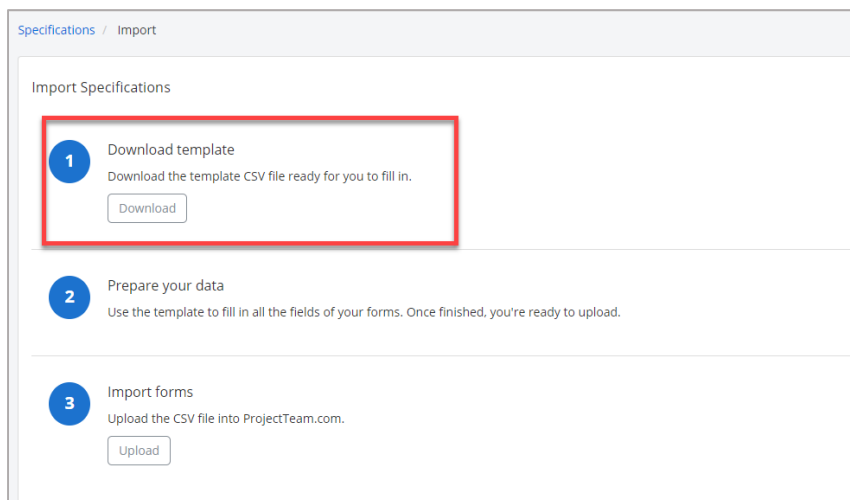# Batch Import

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.

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

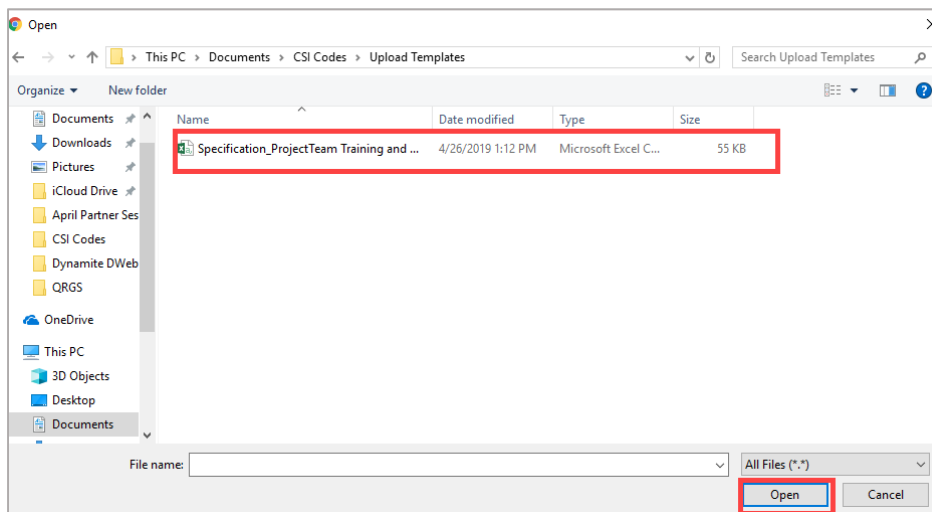5. Return to the form in ProjectTeam and open the batch import page outlined in steps 1 and 2. Click the **Upload** button to import the data contained in the file.

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

	Subject ⇕	Account Code ⇕	Original Budget Amount	Total Approved Budget Amendments	Revised Budget ⇕	Approved ⇕	Approved Date ⇕	Created On ▾	Shared	
☐	Project Executive Monthly Auto Allowance	01-01000-M - Project Executive Auto Allowance	$50,000.00	$0.00	$50,000.00	☐		4/18/19 11:59 AM	👤1	Edit
☐	Project Executive	01-01000-L - Project Executive	$45,000.00	$0.00	$45,000.00	☑	1/10/19	1/10/19 3:35 PM	👤1	View
☐	Project Manager	01-01001-L - Project Manager	$60,000.00	$0.00	$60,000.00	☑	1/10/19	1/10/19 3:35 PM	👤1	View
☐	Field Engineer	01-01002-L - Field Engineer	$30,000.00	$0.00	$30,000.00	☑	1/10/19	1/10/19 3:35 PM	👤1	View
☐	Superintendent	01-01003-L - Superintendent	$75,000.00	$0.00	$75,000.00	☑	1/10/19	1/10/19 3:35 PM	👤1	View
☐	Sitework	02-02000-S - Sitework	$50,000.00	$15,000.00	$65,000.00	☑	1/10/19	1/10/19 3:35 PM	👤1	View