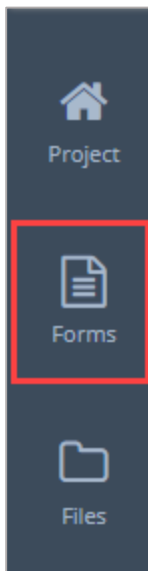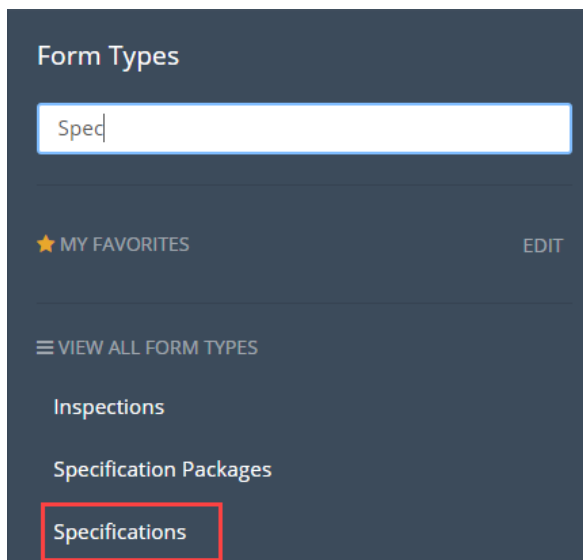# Specifications

A **specification** often refers to a set of documented requirements to be satisfied by a material, design, product, or service.

Uploading Specifications

1. Click the **Forms** icon on the left navigation pane.

2. Enter "**Spec**" in the search field and click the **Specifications** form to open the log.
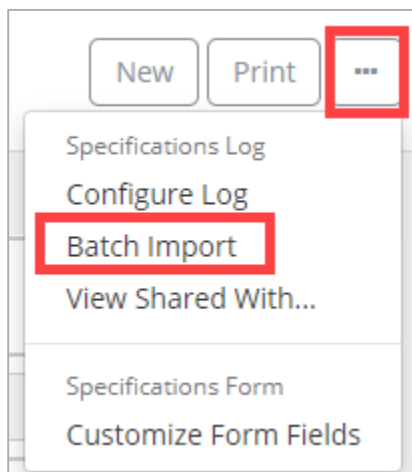
3. The Specifications log will open.

Specifications shared with me						New Print ...
☐ Show Latest Revisions Only						
☐ Subject ⇕	Specification # ⇕	Revision # ⇕	Revision Date ⇕	Created On ⇕	Shared	
No Division defined						
☐ Electrical #1	000-0000	0		2/21/20 6:56 PM	👤1	Edit
☐ Electrical #2	000-0000	0		2/21/20 6:56 PM	👤1	Edit
☐ Electrical #3	000-0000	0		2/21/20 6:56 PM	👤1	Edit

4. Click **the ellipsis button (three dots)** in the top right corner and click **Batch import**.

New   Print   ...

Specifications Log
Configure Log
Batch Import
View Shared With...
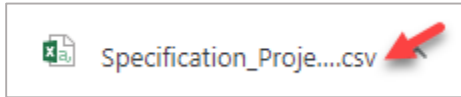
Specifications Form
Customize Form Fields

5. Click the **Download** button to download the batch template.

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
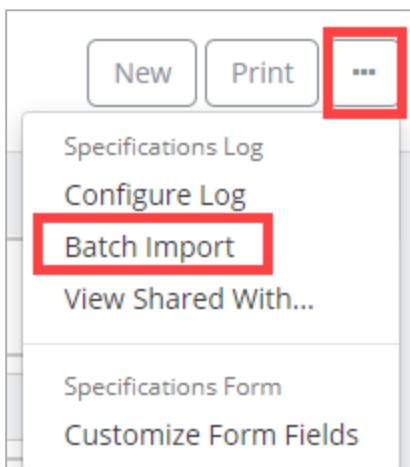Upload the CSV file into ProjectTeam.com.
Upload

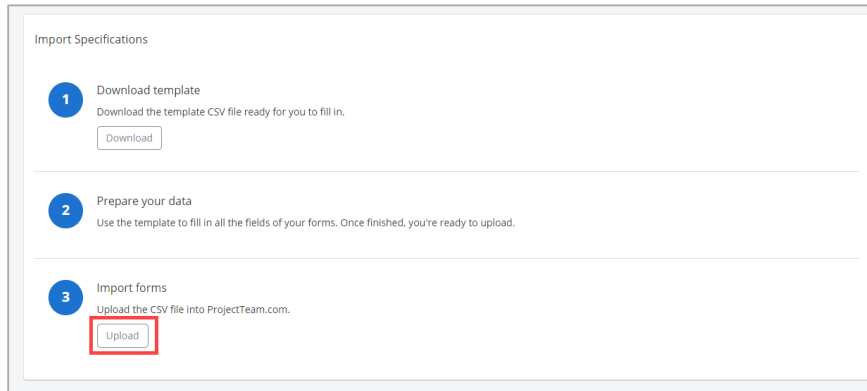6. Open the **downloaded Excel** document.

7. **Update the columns** in the Excel spreadsheet with the applicable information and **save** the template to your computer.
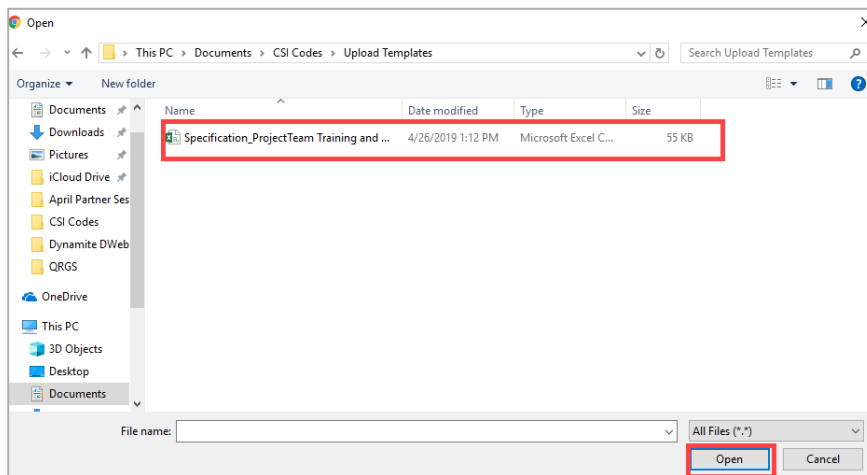

8. In ProjectTeam, navigate to the Specification log within a project.

9. Click **the ellipsis button (three dots)** in the top right corner and click **Batch import**.

10. Click the **Upload** button.

11. Locate the template saved in step 5. Click the **template title** to select and click the **Open** button.

12. If errors are reported, update the template and reupload.

Manually Creating a New Specification

1. Click the **New** button on top of the Specification log. If this is the first Specification for the project, you may click the **Create New Specification** button located in the middle of the screen.
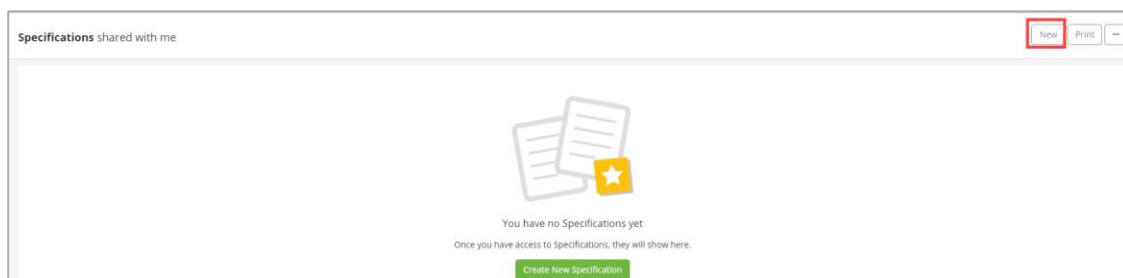
2. Enter the title of the specification in the **Subject** field. Required fields are noted with *Required. These fields will need to be filled out in order to save the document.

> Subject   * Required
>
> Type the Subject

3. Enter the **Divison**.

> Division

4. Enter the **Specification #**.

> Specification #   * Required
>
> Type the Specification #

5. Leave the **Revision #** field as 0 (zero) if this is the first revision of the Specification.

> Revision #
>
> 0

6. Click inside the **Revision Date** field to open the calendar utility and select the date. Manually entering the date is another option but be sure to enter with a 2 digit month, 2 digit year and 4 digit date).
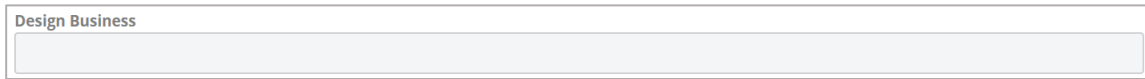
Revision Date

‹		February 2020				›
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
01	02	03	04	05	06	07

7. Click inside the **Discipline** field and select the discipline from the picklist. Manually entering the discipline will also populate with a list below the field matching the data in the field.
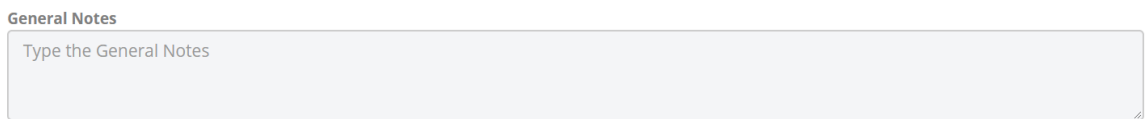
> Discipline

8. Click inside the **Design Business** field to show the picklist or begin manually typing the name of the company responsible for the design.

> Design Business
> [   ]

9. Click inside the **Design Contact** field to show the picklist or begin manually typing the name of the contact for the company responsible for the design.

> Design Contact
> [   ]

10. Enter any applicable information in the **General Notes** field.

> General Notes
> [Type the General Notes   ]

11. To complete and save the **Specification**, click the dropdown arrow beside **Save & Share** and click the **Save** button.
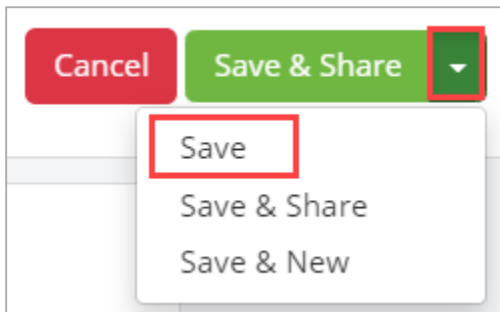
Editing a Specification

1. Navigate to the Specification in the Specification log and click the **subject** to open the document or click the edit button located on the right beside the record.

2. Click the **Edit** button in the Details section.

3. Update all fields you wish to change.

4. When all changes are complete, click the **Save** button.

Create a New Revision of a Specification

1. Navigate to the Specification in the Specification log and click the **title of the specification** to open the document.

2. Click the **Create Revision** button located in the top right corner of the specification document.

3. The Revision Number field will automatically increment to the next revision number in the sequence. Update all fields you wish to change.

4. To complete and save the **Specification**, click the dropdown arrow beside **Save & Share** and click the **Save** button.

5. In the Specfciation log, the old and new revisions of the Specification record will be listed. To see the most recent version, click the **checkbox To Show Latest Revisions** only.