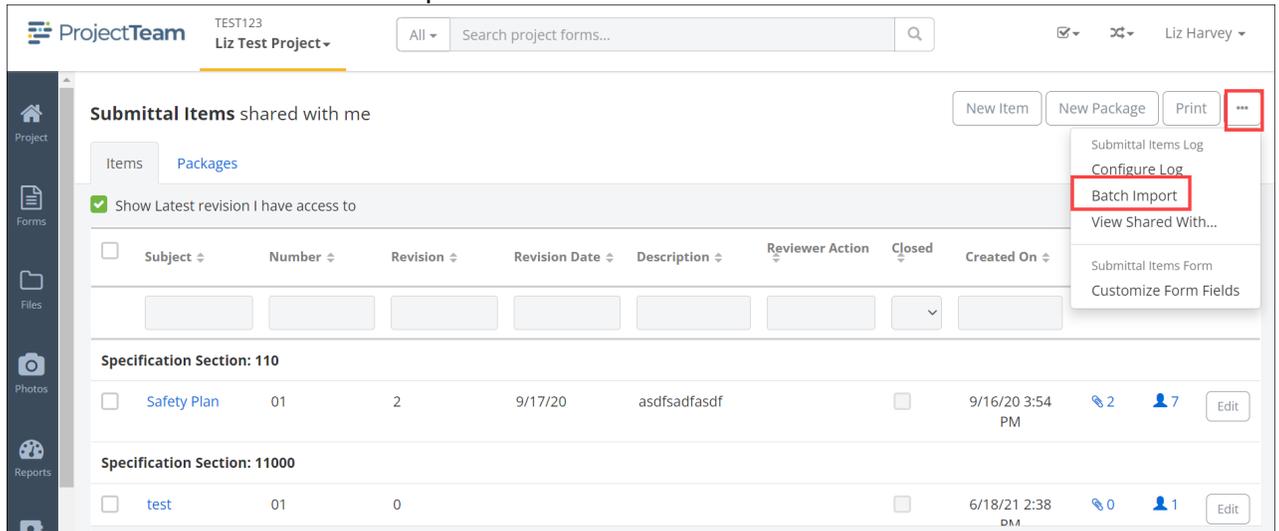


Batch Import Process

ProjectTeam.com gives you the ability to import an entire list into the system with our Batch Import feature. Most form types allow for 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 (...) located on the right corner of the view and then click Batch Import.

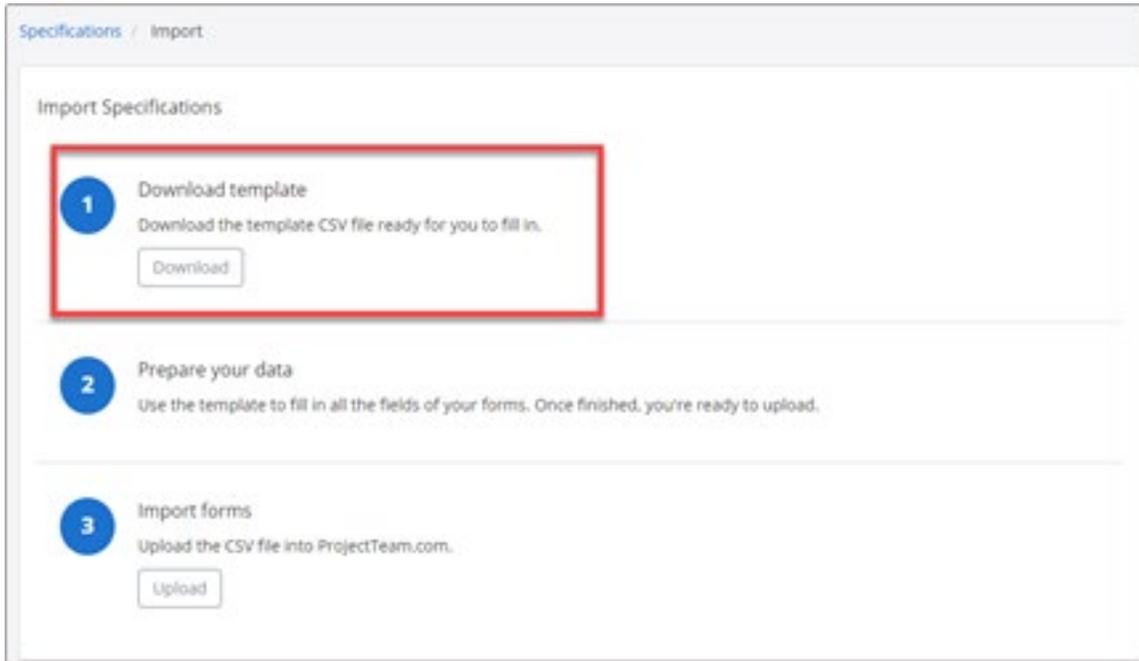


The screenshot shows the ProjectTeam interface for a project named 'Liz Test Project'. The main content area displays 'Submittal Items shared with me' with a table of items. A dropdown menu is open on the right side of the table, showing options like 'Submittal Items Log', 'Configure Log', 'Batch Import', 'View Shared With...', 'Submittal Items Form', and 'Customize Form Fields'. The 'Batch Import' option is highlighted with a red box.

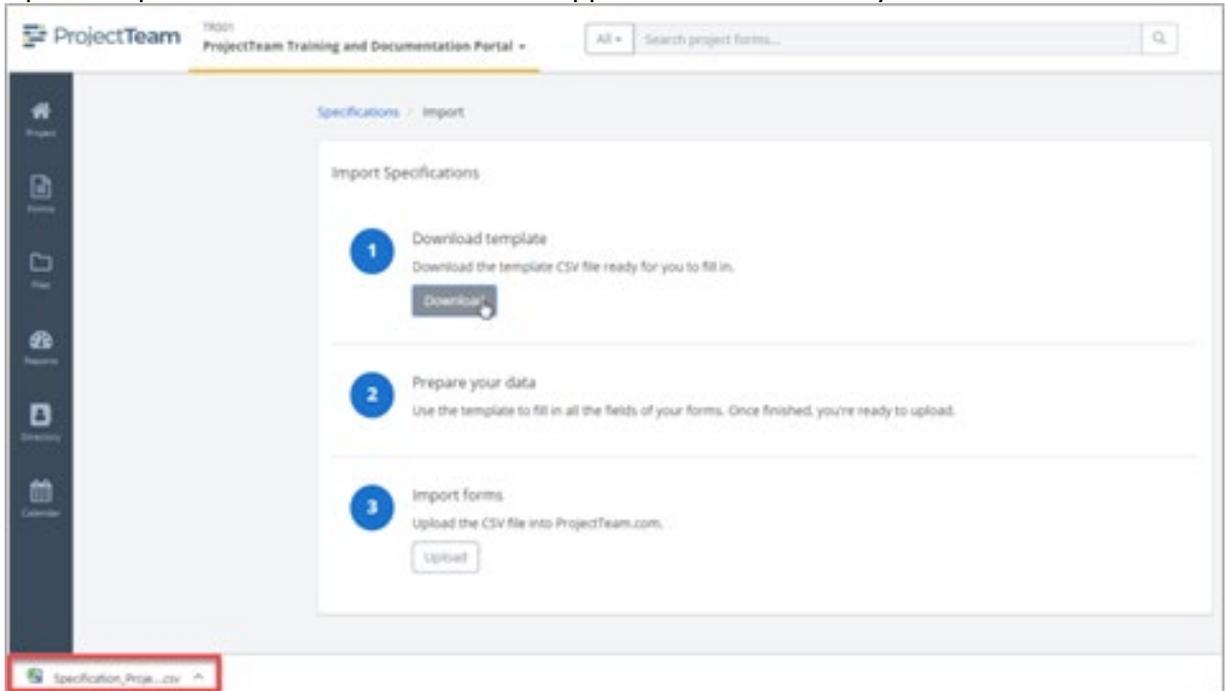
<input type="checkbox"/>	Subject	Number	Revision	Revision Date	Description	Reviewer Action	Closed	Created On	
Specification Section: 110									
<input type="checkbox"/>	Safety Plan	01	2	9/17/20	asdfsadfasdf		<input type="checkbox"/>	9/16/20 3:54 PM	2 7 Edit
Specification Section: 11000									
<input type="checkbox"/>	test	01	0				<input type="checkbox"/>	6/18/21 2:38 PM	0 1 Edit

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

Batch Import



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.

Batch Import

	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			

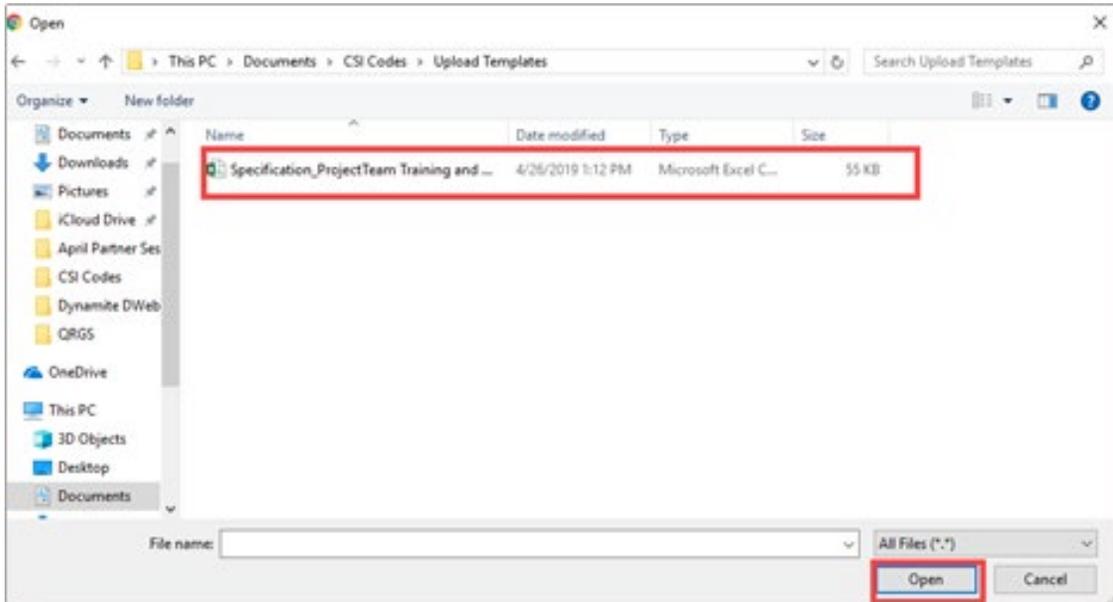
- Return to the form in ProjectTeam.com and open the batch import page outlined in steps 1 and 2. Click the **Upload** button to import the data contained in the file.

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.

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

Batch Import



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.

Special Rules for Importing

When importing account code fields, only use the account code, do not include the description. For example, if your account code is 01000 - General Conditions, you would just need to add 01000 to your CSV import file.

Note: If you're using MS Excel, when you put a number in a cell it will drop the leading zero. This will make your code not match the code you have in ProjectTeam. To fix this, you need to format the cell to be Text format instead of Number of General.

Checkboxes

There are many ways to import checkbox values. When filling in your checkbox field cells, you can use binary options (0 or 1), yes/no, or true/false values. See the chart below to see how ProjectTeam will map your values to the system's "Checked" or "Unchecked" options.

Checked	Unchecked
1	0
Yes	No
True	False

Batch Import

Collections/ Reference Collections

You are not able to import collections or reference collections in the form log batch import process. However, you can import regular collection data on the individual form record level.

Cascading Picklists

You are not able to import cascading picklists in the batch import process at this time.

Option Field Types (Cost Periods/ Picklists)

You can import any picklist that you have on your form. You just need to make sure you exactly match the available options of the picklist to ensure successful import.

Dates

There are many ways to import date values. In ProjectTeam, by default all field values will show simply as dd/mm/yyyy. When filling in your date field cells, you can use the following formats:

Result: 1/1/2020
1/1/2020
January 1, 2020
Wednesday, January 1, 2020

Validated Field Types (Emails/ URL)

Email and URL fields have special field format validation, so you need to make sure the values you import match the requirements. For emails, you need @ and a domain extension. For URL you need to add the full website address including http:// or https://.

Auto-Numbers

You are not able to import auto-numbers in the batch import process currently.

Note: System auto-suggested fields such as Number and Revision on Submittals are able to be imported. Custom auto-number fields are not (the fields with the "Get Next" button on them).

Number Field Types (Numbers/ Currency)

Number fields can only include number characters. Therefore, letters and special characters will cause errors. If your values are numbers only, there should be no problem.

Text Field Types (Phone Number/ Project Directory Fields/Text Fields)

Text fields allow for any combination of letters, numbers, and special characters. If your cell data does not validate any character requirements, you should have no issues importing text data.