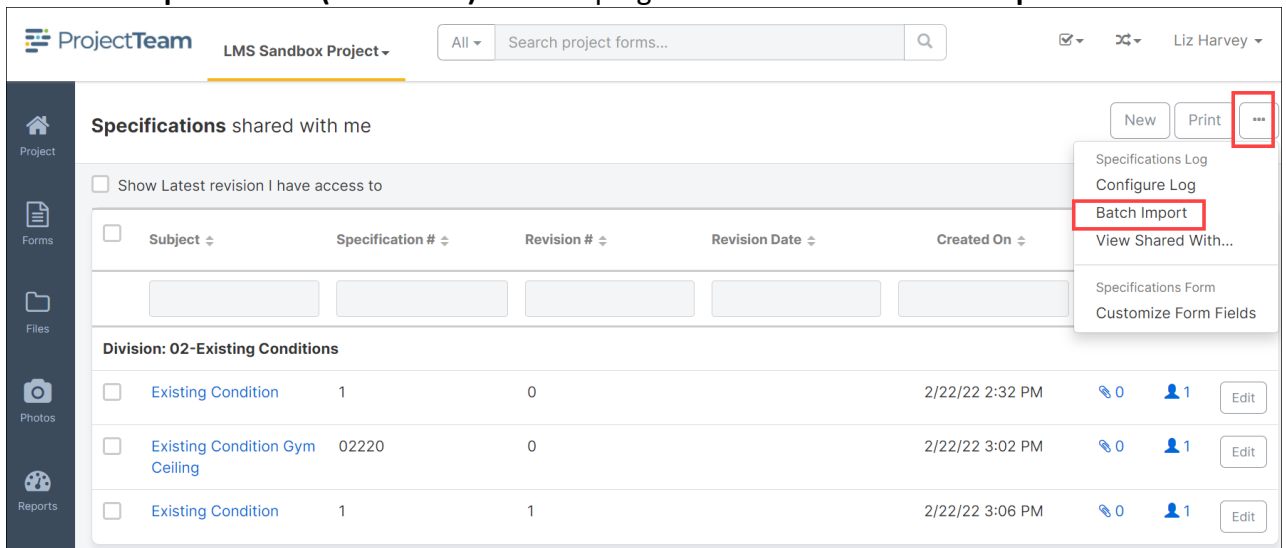


Specifications Overview

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

Uploading Your Specifications

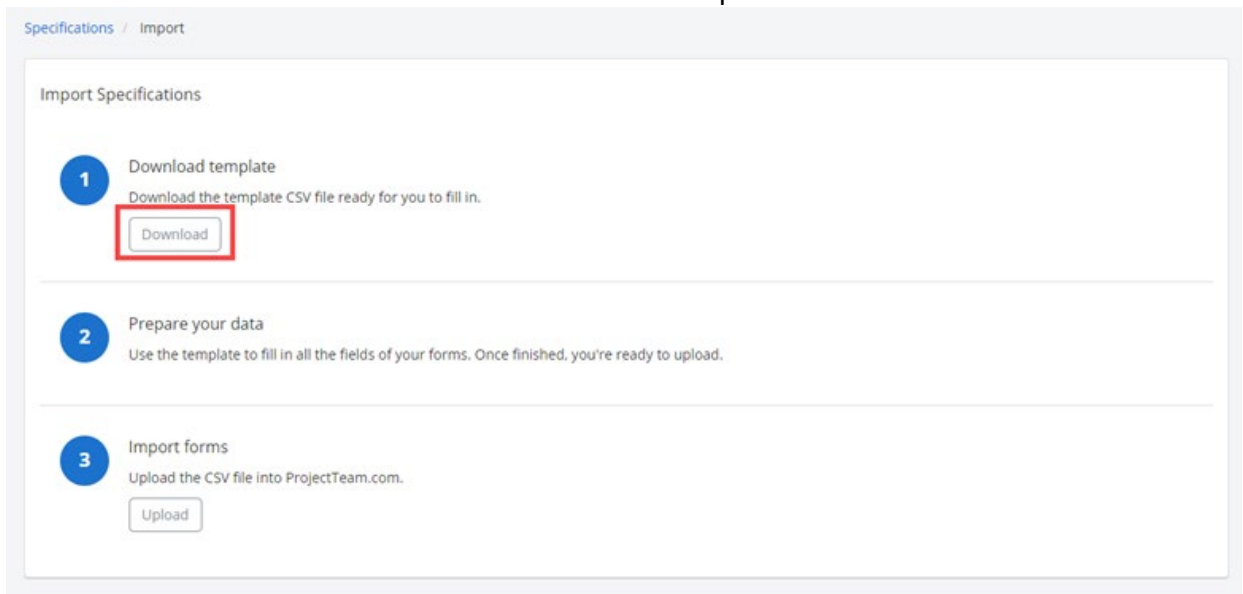
1. Navigate to the Specification log within a project.
2. Click the **ellipsis button (three dots)** in the top right corner and click **Batch import**.



The screenshot shows the ProjectTeam interface for the 'LMS Sandbox Project'. The 'Specifications shared with me' section is active. In the top right corner, there are buttons for 'New', 'Print', and an ellipsis button (three dots). The ellipsis button is highlighted with a red box, and its dropdown menu is open, showing options: 'Specifications Log', 'Configure Log', 'Batch Import' (highlighted with a red box), 'View Shared With...', 'Specifications Form', and 'Customize Form Fields'.

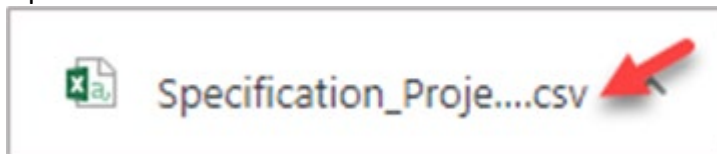
<input type="checkbox"/>	Subject	Specification #	Revision #	Revision Date	Created On	
Division: 02-Existing Conditions						
<input type="checkbox"/>	Existing Condition	1	0		2/22/22 2:32 PM	0 1 Edit
<input type="checkbox"/>	Existing Condition Gym Ceiling	02220	0		2/22/22 3:02 PM	0 1 Edit
<input type="checkbox"/>	Existing Condition	1	1		2/22/22 3:06 PM	0 1 Edit

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



The screenshot shows the 'Import Specifications' page. The first step, 'Download template', is highlighted with a blue circle and a red box around the 'Download' button. The text below the button says 'Download the template CSV file ready for you to fill in.' The second step, 'Prepare your data', and the third step, 'Import forms', are also visible.

4. Open the **downloaded Excel**



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

Subject	Division	Specification #	Revision #	Revision Date	Discipline	Design Business	Design Contact	General Notes
Price & Payment Procedures	01000 - General Data	01200						
Project Financial Information	01000 - General Data	01292						
Administrative Requirements	01000 - General Data	01300						
Professional Consulting Firms	01000 - General Data	01315						
Systems Consulting Firms	01000 - General Data	01316						
Associations & Professional Organizations	01000 - General Data	01317						
Reference Books & Publications	01000 - General Data	01319						
Quality Requirements	01000 - General Data	01400						
Regulatory Requirements	01000 - General Data	01410						
Office Standards	01000 - General Data	01422						
Metriation Standards	01000 - General Data	01424						
Reference Standards	01000 - General Data	01426						
Testing Laboratory Services	01000 - General Data	01452						
Testing Equipment	01000 - General Data	01454						
Inspection Services	01000 - General Data	01456						
Mock-up Requirements	01000 - General Data	01458						
Construction Facilities & Temporary Controls	01000 - General Data	01500						
Temporary Utilities	01000 - General Data	01510						
Construction Facilities	01000 - General Data	01520						
Field Offices & Sheds	01000 - General Data	01522						
Construction Cranes, Elevators & Hoists	01000 - General Data	01542						
Construction Scaffolding & Platforms	01000 - General Data	01544						
Construction Debris Chutes	01000 - General Data	01546						

6. In ProjectTeam, navigate to the Specification log within a project.
7. Click the **ellipsis button (three dots)** in the top right corner and click **Batch import**.

ProjectTeam LMS Sandbox Project

Search project forms...

Specifications shared with me

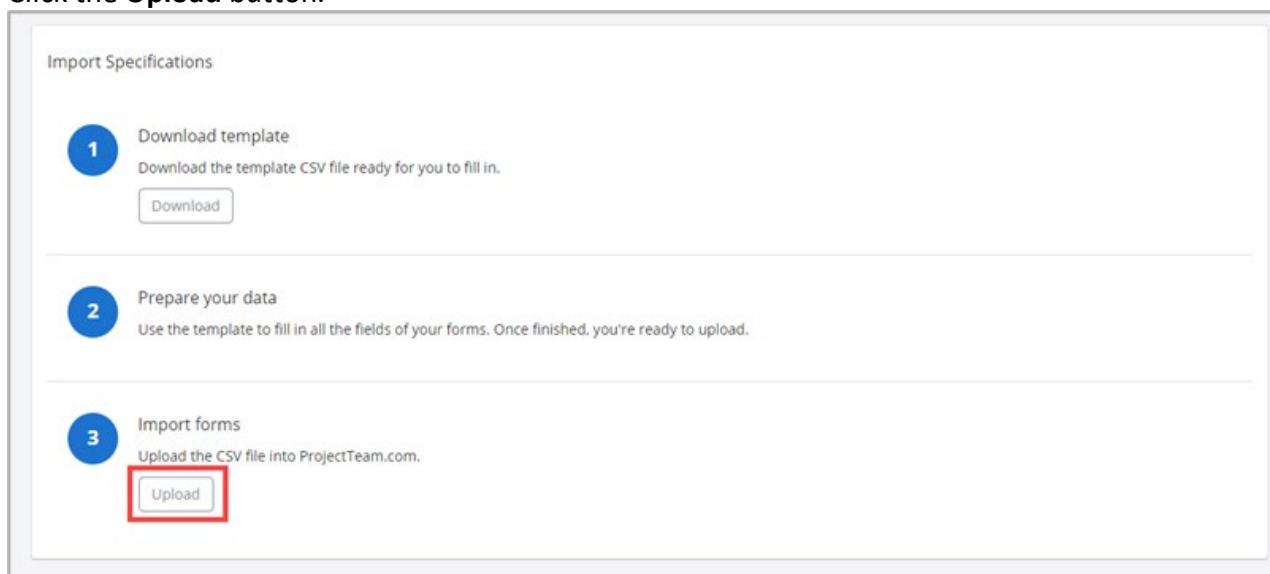
☐ Show Latest revision I have access to

<input type="checkbox"/>	Subject	Specification #	Revision #	Revision Date	Created On	
<input type="checkbox"/>	Existing Condition	1	0	2/22/22 2:32 PM	0 1	Edit
<input type="checkbox"/>	Existing Condition Gym Ceiling	02220	0	2/22/22 3:02 PM	0 1	Edit
<input type="checkbox"/>	Existing Condition	1	1	2/22/22 3:06 PM	0 1	Edit

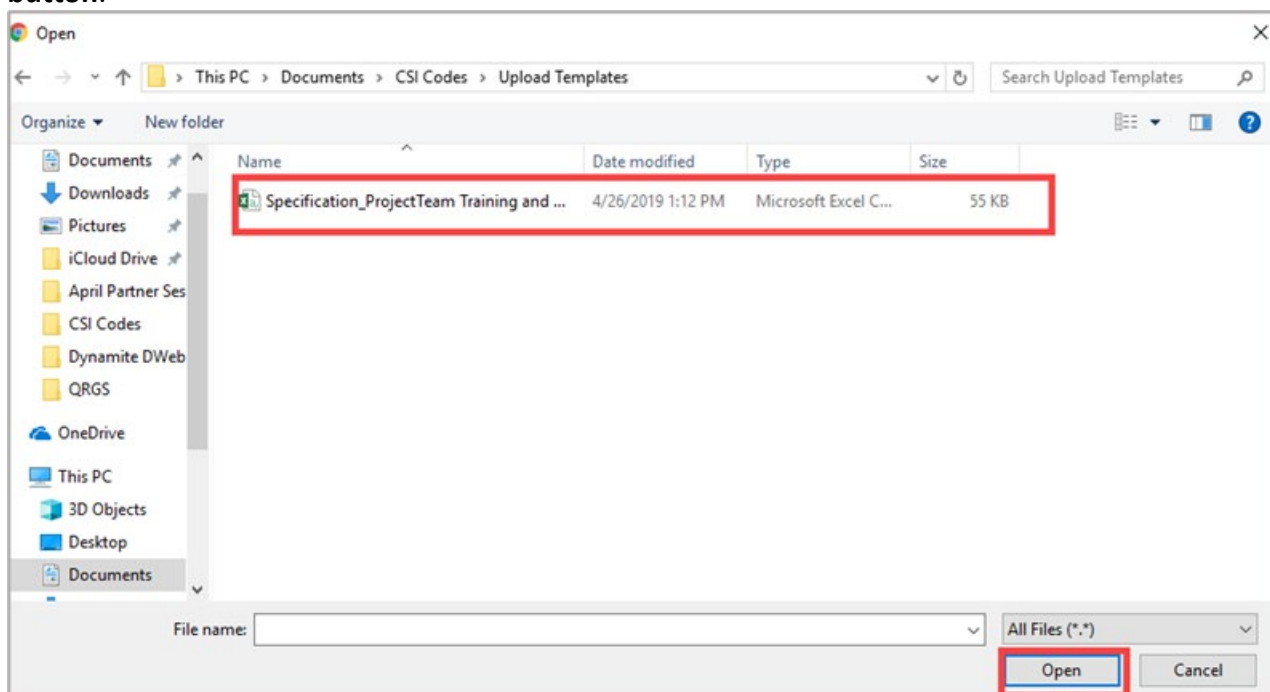
Division: 02-Existing Conditions

Batch Import

- Click the **Upload** button.



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

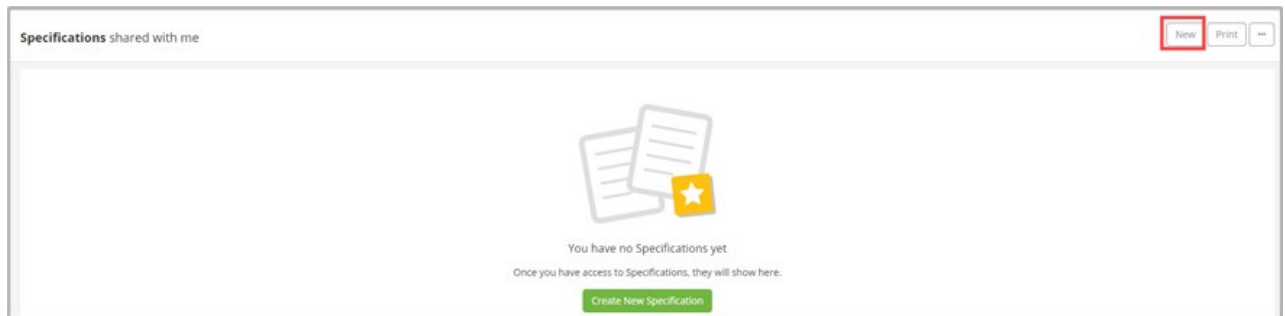


- If errors are reported, update the template and reupload.

Manually Creating a New Specification

- 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.

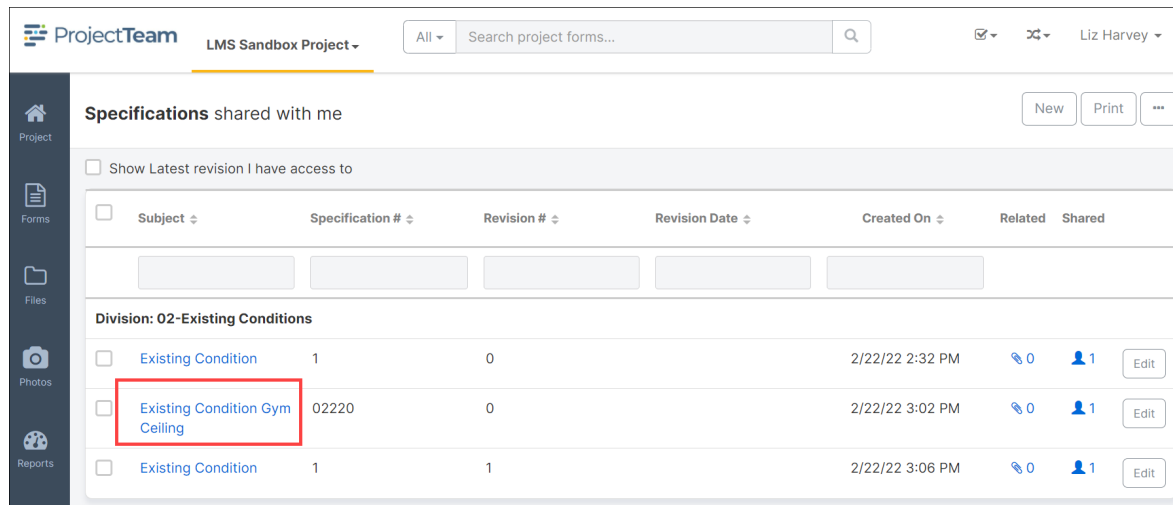


2. Fill in the fields of the Specification form. Required fields are noted with *Required. These fields will need to be filled out to save the document. If you have access to additional custom fields, you may want to fill these out as well.

3. When you are ready to save the Specification, click the **Save & Share**. This will allow you to save the document and send it to other members of your project.

Editing a Specification

1. Navigate to the Specification in the Specification log and click the **subject** to open the document.



ProjectTeam LMS Sandbox Project

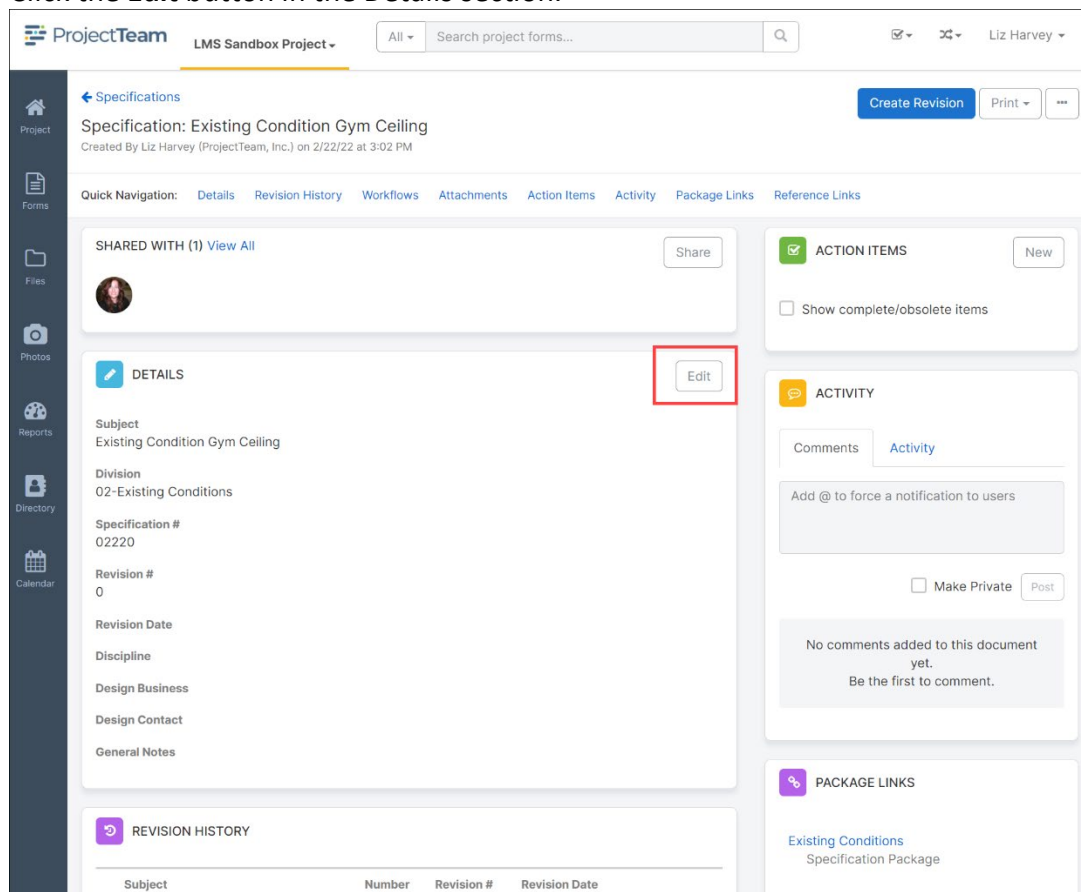
Search project forms...

Specifications shared with me

☐ Show Latest revision I have access to

<input type="checkbox"/>	Subject	Specification #	Revision #	Revision Date	Created On	Related	Shared	
Division: 02-Existing Conditions								
<input type="checkbox"/>	Existing Condition	1	0		2/22/22 2:32 PM	0	1	Edit
<input type="checkbox"/>	Existing Condition Gym Ceiling	02220	0		2/22/22 3:02 PM	0	1	Edit
<input type="checkbox"/>	Existing Condition	1	1		2/22/22 3:06 PM	0	1	Edit

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



ProjectTeam LMS Sandbox Project

Search project forms...

Specifications

Specification: Existing Condition Gym Ceiling

Created By Liz Harvey (ProjectTeam, Inc.) on 2/22/22 at 3:02 PM

Quick Navigation: Details Revision History Workflows Attachments Action Items Activity Package Links Reference Links

SHARED WITH (1) View All

Share

ACTION ITEMS

Show complete/obsolete items

DETAILS

Subject
Existing Condition Gym Ceiling

Division
02-Existing Conditions

Specification #
02220

Revision #
0

Revision Date

Discipline

Design Business

Design Contact

General Notes

REVISION HISTORY

Subject Number Revision # Revision Date

Activity

Comments

Add @ to force a notification to users

Make Private Post

No comments added to this document yet.
Be the first to comment.

PACKAGE LINKS

Existing Conditions
Specification Package

3. Update all fields you wish to change.

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

The screenshot shows the 'Edit Specification' form in ProjectTeam. The form has a sidebar on the left with icons for Project, Forms, Files, Photos, Reports, Directory, and Calendar. The main content area is titled 'Edit Specification' and contains a 'DETAILS' section with the following fields:

- Subject: Existing Condition Gym Ceiling
- Division: 02-Existing Conditions
- Specification #: 02220
- Revision #: 0
- Revision Date: (empty)
- Discipline: (empty)

At the top right of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red box.

Create a New Revision of a Specification

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

The screenshot shows the 'Specifications shared with me' log in ProjectTeam. The log displays a table of specifications with the following columns: Subject, Specification #, Revision #, Revision Date, Created On, Related, and Shared. The 'Existing Condition Gym Ceiling' entry is highlighted with a red box.

Subject	Specification #	Revision #	Revision Date	Created On	Related	Shared
Existing Condition	1	0		2/22/22 2:32 PM	0	1
Existing Condition Gym Ceiling	02220	0		2/22/22 3:02 PM	0	1
Existing Condition	1	1		2/22/22 3:06 PM	0	1

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

The screenshot shows the ProjectTeam interface for a specification document titled "Specification: Existing Condition Gym Ceiling". The document was created by Liz Harvey on 2/22/22 at 3:02 PM. In the top right corner, the "Create Revision" button is highlighted with a red box. Below the document title, there is a "Quick Navigation" bar with links to Details, Revision History, Workflows, Attachments, Action Items, Activity, Package Links, and Reference Links. The main content area is divided into several sections: "SHARED WITH (1)" with a "Share" button, "DETAILS" with an "Edit" button, "ACTION ITEMS" with a "New" button, "ACTIVITY" with a "Comments" tab and a "Post" button, and "REVISION HISTORY" with a table showing the revision number and date. The "DETAILS" section includes fields for Subject, Division, Specification #, Revision #, Revision Date, Discipline, Design Business, Design Contact, and General Notes. The "REVISION HISTORY" table has columns for Subject, Number, Revision #, and Revision Date.

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

The screenshot shows the "New Specification Revision" form. The form has a "Cancel" button and a "Save" button in the top right corner. The form is divided into several sections: "DETAILS" with fields for Subject, Division, Specification #, Revision #, Discipline, Design Business, Design Contact, and General Notes. The "Revision #" field is highlighted with a red box and contains the value "1". The "Discipline" field is set to "Civil". The "Design Business" field is set to "ProjectTeam, Inc.". The "Design Contact" field is set to "Debra Rakes (ProjectTeam, Inc.)". The "General Notes" field is empty.

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

The screenshot shows the 'Edit Specification' form in the ProjectTeam interface. The form is titled 'Edit Specification' and is located under the 'LMS Sandbox Project'. The form contains the following fields:

- Subject: Existing Condition Gym Ceiling
- Division: 02-Existing Conditions
- Specification #: 02220
- Revision #: 0
- Revision Date: (empty)
- Discipline: (empty)

The 'Save' button is highlighted with a red box.

5. In the Specification 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**.

The screenshot shows the 'Specifications shared with me' table in the ProjectTeam interface. The table has the following columns: Subject, Specification #, Revision #, Revision Date, Created On, Related, and Shared. The table lists three specifications:

Subject	Specification #	Revision #	Revision Date	Created On	Related	Shared
Existing Condition	1	0		2/22/22 2:32 PM	0	1
Existing Condition Gym Ceiling	02220	0		2/22/22 3:02 PM	0	1
Existing Condition	1	1		2/22/22 3:06 PM	0	1

A red box highlights the 'Revision #' column, and a red arrow points to the value '1' in the 'Revision #' column for the 'Existing Condition' row.