

# BATCH IMPORT

ProjectTeam.com gives you the ability to import an entire list into the system with our Batch Import feature.

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

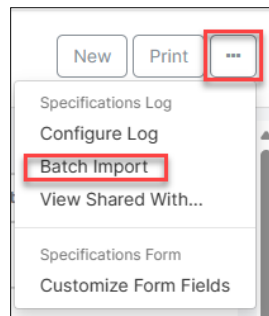
[Batch Import Records](#)

[Related Resources](#)

## BATCH IMPORT RECORDS (USING SPECIFICAITONS FOR AN EXAMPLE)

The Batch Import feature allows you to upload the entire list at one time.

- 1) **Open** the Log View of the form type.
- 2) From the Log View screen, click on the **ellipses** in the upper right, and select **Batch Import**.



- 3) **Download Template:** Click **download** to download the csv template file.

**1** Download template  
Download the template CSV file ready for you to fill in.

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**2** Prepare your data  
Use the template to fill in all the fields of your forms. There is a maximum of 1,000 rows for each import. [Make sure you remove all duplicates before the import.](#) ProjectTeam.com will not automatically remove duplicates. Once you finish, you're ready to upload.

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**3** Import forms  
Upload the CSV file into ProjectTeam.com.

- 4) **Prepare Your Data:** Open the csv file in Microsoft Excel and enter the data to be imported. Do not change the headers in the template. Data must match the format in the form.
  - a. **Subject** is a required text field. Therefore, a value must be present in each row for a successful import.
  - b. **Division** is a picklist, but optional. The value **must** match exactly to the list from the dropdown in the form field.
  - c. **Specification #** and **Revision #** are both numeric fields so can only contain numeric values.
  - d. Date fields like **Revision Date** can be in any supported excel date format.
  - e. Fields that are not required can be left blank.
  - f. **Save** the CSV file to your local drive.

	A	B	C	D	E	F	G	H	I
1	Subject	Division	Specification #	Revision #	Revision Date	Discipline	Design Business	Design Contact	General Notes
2	DSI Technical Specifications		11003	0					
3	Compaction Specification		55418	0					
4									
5									

- 5) **Import Forms:** From the Batch Import window shown in step 3, click **Upload** and select the CSV file.
- 6) After import, click the **View Specifications log** button to review your imported data.

Import Specifications



**Import successful**

Perfect! We found no errors during the import process. You successfully imported **3** Specifications.

## RELATED RESOURCES

### Help Pages

[Batch Import Records](#)

[Specifications](#)