



<u>Budget Import Utility</u> Quick Guide

• Click "Enable Editing" to disable Macros

 To access, go to the R: Drive. Click on the <u>CMiC</u> <u>folder</u>, and click on "Budget Import Utility"

 Use the scope sheet from preconstuction to complete the cost code, description, category, and budget cost

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Com	pany Code	LKCO	Create PCI (Field)	Create PCI (En	terprise)	Elimir Ouar	nate Duplicate C	lutput		slidate Only, Do Not Tr	anslate		
jecť	s Job Code		Import File	Import F	ile	Cubi	unes	. fort and		t All Insuit MR 4 to first			
	PCI Code	ORIG001	Create Bid Item	Invest 100		✓ blan	k Output WM fo	r the Cost	°	ank input WM for the	Cost		
	PCI Name	Imported Budget	Import File	Import JCE	: File	Code			_ 0	ode-Category			
	PCI Date	45134	Create Non-commitment	Manually Refre	esh CMiC	Auto	matically truncal rictions that are	te too loop (50		etrict to Valid Data			
	PCI June	OPIG	Cost Import File	Translated V	/alues	char)	in import file.	too long (so		Select to Yord Dota			
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od	· ·	Cost Code IT	Description	*	Subcontra		Category	-	Cost	Budget Revenue	, Code	✓ CMRC Cost Code	~ C
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 Click on "Translation Tables" to find the CMiC Cost Code and the Description

• Press "Control F" at the same time to search the translation table



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Click Close	
	- -
Click "Validate Imported D	ata"
"NOTE: There will be erro	ors
CHANGE ORDER IMPORT	
Change Order Import	
Import File	
Validate Imported Data	
Build Change Orders	Import File
Press button to select the action	File 06841.00 ORIG002 PCI import.csv Update
	Import
Imported records: 49 Errors: 2	
8	
0	
Click "Edit Imported Data"	
\circ I his will bring you to a	new screen
CHANGE ORDER IMPORT	
Change Order Import	
Import File	
Edit Imported Data	
Build Change Orders	
Delete Imported Data	
Press button to select the action.	
Imported records: 49 Errors: 2	

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- Check "Validate All Records"
- Check "Create Phase/ Category"
- Click "Re-Validate"

Valid	Warn	Record	Comp	Job	Change Order	Change Order Description	Reference Date	Туре	Status	Owner Cl
1		1	LEEKE	00841.00	ORIGUUZ	Imported Budget	Dec 13, 2022 00	URIG	ACO	
		8	LEEKE	06841.00	ORIG002	Imported Budget	Dec 13, 2022	ORIG	ACO	
		9	LEEKE	06841.00	ORIG002	Imported Budget	Dec 13, 2022	ORIG	ACO	
		10	LEEKE	06841.00	ORIG002	Imported Budget	Dec 13, 2022	ORIG	ACO	
		11	LEEKE	06841.00	ORIG002	Imported Budget	Dec 13, 2022	ORIG	ACO	
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		14	LEEKE	06841.00	ORIG002	Imported Budget	Dec 13, 2022	ORIG	ACO	
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		16	LEEKE	06841.00	ORIG002	Imported Budget	Dec 13, 2022	ORIG	ACO	
-		47	LEEVE	00044.00	0010000	form where Development	D 42 2022 (**	0010	100	

Validate All Records Create Phase/Category Re-Validate More Errors

Close

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• Ma alr	ake sure eady in	that the P the Projec	Cl Code is corre t	ect	and not	
۱ I	Company Code	LEEKENC2	Create PCI (Field)	Creat	e DCI (Enternrise)	
	ject's Job Code	02171.00	Import File	Cicau	Import File	
	PCI Code	ORIG001				-[
	PCI Name	Imported Budget	Create Bid Item Import File	Ir	nport JCE File	
	PCI Date	2/2/2023				-
	PCI Status	ACO	Create Non-commitment	Manu	ally Refresh CMiC	
	PCI Type	ORIG	Cost Import File	1172	ansiated values	
	Override Job Code	Cost Code	Description	*	Subcontracto r	Са
		015085.00	Final Cleaning			L
		015015.00	Progress Cleaning / Laborer - St Time	traight		L
		02 41 00	Demolition		Diversified	S
		06 10 00	Rough Carpentry		LKCO	0
		06 40 00	Millwork		Mass Cabinets	S
		08 10 00	Doors and Frames		O'Connor	S
		08 80 00	Glass & Glazing		A&A Windows	S
		09 29 00	Drywall		Unity Construction	S
		09 90 00	Painting		Brian T Malone	S
		11 00 00	Appliances		Advantage Applia	5

14 - Add Attachments	
 Click on "Attachmer 	nt" tab
 Click on upload multiplication 	tiples
PCI Datail BEO Devices/Approval Noter Datated Objects Attractments Victory	🖉 Edit Details 🔶 Back Tr. fog 土 Upload Multiple 🗖 ES yn Documents
ORIG002 - Imported Budget	
DOCUMENTS	
Sort By: Newest V	
Attachment Type Number Name Rev. Number Rev. Date	Description Notes User Status ESignings ESign Status Action
No Records Found	
Upload Original Bud PCI DESM RFQ REVENANCES NOTES RESIDENCES	get Import File (.xlms file)
ORIG002 - Imported Budget Viplead Multiple Documents - Google Chrome enterprise.cmicdoudr12.com/cmicprod/PMDocument/Show1	- C X MultipleUpload.do?docObjectType = PMCHGM8udocObjectOraseq = 13908368928upload_version = 2
Attachments UPLOAD MULTIPLE DOCUMENTS	
Sort By: Newest V	No file chosen
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Number of Fi	HE 1
	Type Has Mandatory Fields Action
 Click "Proceed" 	Attachment V
*NOTE: When upl	oading the attachment, the
.xlms file cannot	he saved on OneDrive
	De Saveu un UneDrive