

Cost Codes Quick Reference Guide

This topic provides a reference for the Project Center **Cost Codes** activity center.

Purpose

The **Cost Codes** activity center is a reference list of the project cost structure. Cost codes are required when entering a **Schedule of Values** for a contract.

Audience

Internal Newforma Project Center users with Financial Manager permissions.

Key Features

- Create and track cost code records to provide cost code-level detail for contract commitments.

Tasks covered

- Create cost codes
- Import cost codes

To create cost codes

Cost codes can be created one at a time or imported from a spreadsheet. Because cost codes are required to track specific line item costs on contracts, change orders and potential change orders, they should be entered as part of the initial project setup.

1. To add a cost code manually, go to the **Cost Codes** activity center and select **Define Cost Code** from the **Tasks** panel.



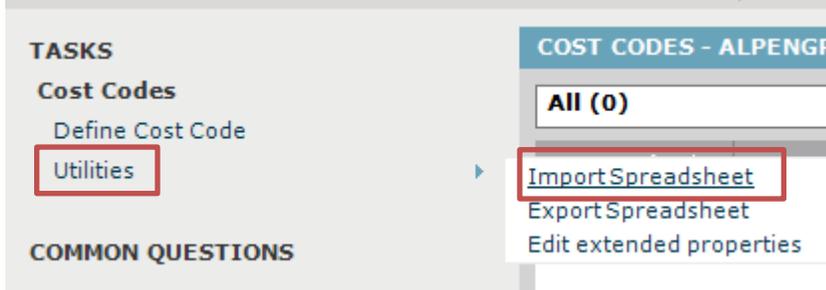
2. Fill out the **Cost Code** and **Name** (description) in the **Define a Cost Code dialog box**. Select **OK** to save.

To import cost codes

1. To import cost codes, use the import spreadsheet located on your server in \\Program Files\Newforma\Twelfth Edition\Project Center\Templates. The spreadsheet is called **Import_CostCodes_Template.xlsx**. Complete instructions are in the template on how to prepare it for import.

*Depending on your system, you may need to go to the **Program Files (x86)** folder instead of **Program Files**.*

2. Once the spreadsheet is completed, go to the **Cost Codes** activity center and select **Utilities > Import Spreadsheet** from the **Tasks** panel. Browse to locate the spreadsheet and select **Open**.



3. To change existing cost codes, select the code and click **Modify** from the **Tasks** panel to open and edit.