

Protean Software

Job Visits Import

Job Visits Import



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Job Visits Import



Protean Versions

This document describes the import functionality of job visit records from Protean 7.3.4033 to Current Latest Release

Description

This import template is used to **create** job visit records.

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Fields on the Import - expected number of columns = 9:

Column	Field Name	Mandatory	Requirements	Notes
A	Job Number	Always	Required Field Numeric Field – Must Exist in Protean	Mandatory field, required, needs to be the job number the visit relates to
B	Engineer name	Always	Text Field – 50 Characters max Required Field Must Exist in Protean	Mandatory field, Engineer name, must exist in Protean
C	Visit Date	Always	Date Field in format DD/MM/YYYY	Date field in the following format 01/01/2020
D	Time On	Always	Time Field – 24 Hour HH:MM	Enter time on in the following 24 hour format 00:00
E	Time Off	Always	Time Field – 24 Hour HH:MM	Enter time off in the following 24 hour format 00:00
F	User Ref 1	No	Text Field – 50 Characters Max Must Exist in Protean	Must Exist in Protean, as a dropdown from Ref1, will still work if this field has been renamed
G	User Ref 2	No	Text Field – 50 Characters Max	Enter free text (up to 50 Characters) Will still work if the field Ref 2 has been renamed
H	Work Report	No	Memo Field	Enter the notes from the engineers visit (Engineer Report)
I	Complete	Always	Mandatory Y/N Field	If Y the visit will be marked as complete, if N the visit will remain open

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How to import

1. File must be saved in CSV format.
 - a. File must not contain any header rows.
2. Navigate to file tab on Protean
3. Select Import Data
4. Use the import wizard
5. Select 'Job Visits' under the type of data dropdown
6. Find the CVS import file (as per step 1)
7. Hit Next to validate the data
 - a. If needed correct import file
8. If step (7) successful - Double check the data on screen
9. Hit next to import into Protean
 - a. If needed review any warning messages and either correct in Protean / Import file and revert to step (2) onwards
10. If successful choose to keep or delete the import file used

Best Practice

- If using Excel – do not double click to open a CSV File.
- Open Excel and use a data import from text to open any CSV
 - Select text formatting for any data including leading zeros
- Once ready, save in CSV format – including the header rows
- Review the saved CSV file in raw text format
- Remove the header row from the raw text CSV - save as another name with .csv formatting
- Run any major import in a practice environment before live
- Carry out a sample import of under 10 records before any larger import

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Other Info

Regular scheduling of this import is possible via the Protean scheduler.

Further Assistance

Example CSV template available on support website

Please review import templates webinar - <https://support.proteansoftware.co.uk/knowledge-base/webinar-import-templates/>

Contact Protean Support

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Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	24/12/2019	MH