

Protean Software

Job Parts Import

Job Parts Import



Contents

Protean Versions	3
Description	3
Fields on the Import - expected number of columns = 9:	4
How to import	5
Best Practice	5
Other Info	6
Further Assistance	6

Job Parts Import



Protean Versions

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

Description

This import template is used to **add parts** to open jobs in Protean.

Job Parts Import

Fields on the Import - expected number of columns = 7:

Column	Field Name	Mandatory	Requirements	Notes
A	Job Number	Always	Required Field Numeric Field – Must Exist in Protean	
B	Part Number	Always	Text Field – 50 Characters max Must Exist in Protean	
C	Stock State	Always	Stock State must be supplied as an Abbreviation (N, R or U) which represent 'New', 'Refurbished' and 'Used' respectively.	
D	Quantity	Always	Numeric	Must not be negative
E	Price	No	Numeric	Must not be negative
F	Discount	No	Numeric - , if supplied, must be in the valid range of 0 to 100 and not as the decimal representation. (i.e. 7.5% would be supplied as 7.5 not 0.075)	
G	Equip No	No	Must match equipment number already on job. Only necessary to assign parts on multiple equipment jobs.	If no data is in this field, follow best practice to ensure correct formatting of CSV file, otherwise import will fail.

Job Parts Import

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

Job Parts Import



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

Job Parts Import

Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Matt Hayden	16/03/2020	MH