

Protean Software

Jobs Import

Jobs Import



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Protean Versions

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

Description

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

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Fields on the Import - expected number of columns = 21:

Column	Field Name	Mandatory	Requirements	Notes
A	Customer Alpha	Always ¹	Required Field Text Field – 17 Characters Max Also see notes on next page ¹	Mandatory field, required, needs to be either the customer alpha code or the site alpha code
B	Site Alpha	Always ¹	Required Field Text Field – 17 Characters Max Also see notes on next page ¹	Mandatory field, if site alpha used in customer, use again, if not use site alpha
C	Job Type	No	Job type label, must exist in Protean. Text Field – 50 Characters Max	Not mandatory but will use default job type if left blank
D	Service Type	No	Must exist in Protean Text Field – 50 Characters Max	Adds the service type to the job if the job type is part of the service category against the job type
E	Equipment Number	No	Must exist in Protean Text Field – 50 Characters Max	Enter the equipment number the job is for. ** Please note, ONLY 1 piece of equipment can be imported via the job import, multi equipment jobs cannot be imported.
F	Authority	No	Text Field – 50 Characters Max	Populates the authority field in a job
G	Reference	No	Text Field – 255 Characters Max	This populates the Order Number Field in Protean (Customer Order Number)
H	Logged Date	No	Required Field Date / Time Field	If left blank will default to current date and time
I	Due Date	No	Required Field Date / Time Field	If left blank will default to blank unless category of call out then will set based on either system settings or contract settings for response times if a specific equipment has been added.

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J	Contact Name	No	Text Field – 50 Characters Max	Does not need to exist in system, **Please note if the contact does exist, the import does not link to that contact but adds what is here just to this job.
K	Contact Telephone	No	Text Field – 50 Characters Max	Enter Phone Number of Job Contact. Can add text such as extension etc.
L	Contact Email	No	Text Field – 255 Characters Max	Enter the email address of the job contact (Does not link to customer contacts)
M	To Do	No	Text Field – approx. 500,000,000 Characters	This is the to do section of the job, can contain a lot of text and is very sizeable (Over 500 million characters approx.)
N	Notes	No	Text Field – approx. 500,000,000 Characters	This is the internal notes section of the job, can contain a lot of text and is very sizeable (Over 500 million characters approx.)
O	User Ref 1	No	Text Field – 50 Characters Max Must exist in Protean	Reference 1 field, value must exist in the dropdown of the ref1 field in Protean.
P	User Ref 2	No	Text Field – 50 Characters Max	Text field that will populate the reference 2 field (Even if renamed) of the job
Q	External Customer Ref	No ¹	Text Field – 50 Characters Max See notes on next page ¹	External customer reference linked to the customer record, must exist in Protean against the customer
R	External Site Ref	No ¹	Text Field – 50 Characters Max See notes on next page ¹	External site reference linked to the site record, must exist in Protean against the site

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S	External Equipment Number	No	Text Field – 50 Characters Max	Customer equipment number, must exist against the piece of equipment the job is linked to. If External Equip No is specified then this will be used rather than Equip No
T	Place Job	Yes	Y/N Field	Enter Y to Place and N to leave at entry status
U	Internal Job ID	Yes	Numeric Field Used for updating order numbers on existing jobs.	This is the Protean Job No, this field is used to establish a link between the Job being imported and an existing Job in Protean. The only update that will happen for records with this value specified is that the value supplied in the Reference field will be passed to the existing Job.

NOTES:

¹A combination of both a Customer and Site Account must exist but they may be specified as either an internal Protean Alpha or External Reference.

A duplicate Job is identified by the combination of Customer, Reference and Logged Date

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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