

Job user references import

***Ensure rows 1,2 & 3 are deleted before entering data into the sample template**

Column	Field name	Notes
A	Job number	Numeric job number, must exist in Protean
B	User ref 1	Text field, enter the desired reference or <DO NOT IMPORT> or leave blank for no Changes <CLEAR FIELD> - Value updates to Null
C	User ref 2	Text field, enter the desired reference or <DO NOT IMPORT> or leave blank for no Changes <CLEAR FIELD> - Value updates to Null
D	User ref 3	Text field, enter the desired reference or <DO NOT IMPORT> or leave blank for no Changes <CLEAR FIELD> - Value updates to Null
E	User ref 4	Text field, enter the desired reference or <DO NOT IMPORT> or leave blank for no Changes <CLEAR FIELD> - Value updates to Null

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 user references' 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