

Stream Alert List Management Formatting and Importing Lists

Cleo's Stream Alert® provides a comprehensive list management tool via the web launch interface. To format an existing list and import it into Stream Alert, simply follow the steps below.

Formatting

Lists must be formatted as a .csv file with the following fields. Microsoft Excel is the easiest program to use when formatting lists. The fields must be entered in the following order, with the following column headers: FirstName, LastName, Phone1, Phone2, Phone3, Phone4, Cell1, Cell2, Fax1, Fax2, Email1, Email2, SMS1, SMS2, Pager1, Pager2. The list template is also available via the 'Help' section within the Stream Alert web interface.

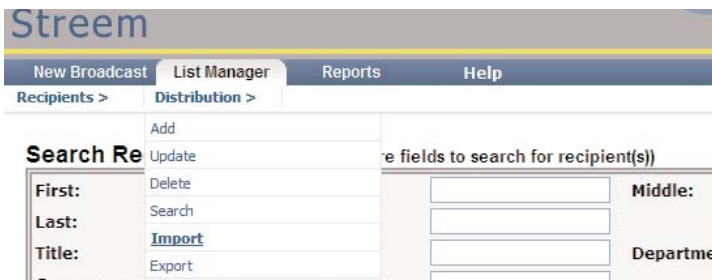
	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Last Name	Phone1	Phone2	Phone3	Phone4	Cell1	Cell2	Fax1	Fax2	Email1
2	Mary	Smith	8152825555				8152825557		8152825559		msmith@abc.com
3											

Copy & paste the headers into a new Excel file and add the recipient information. Once the database is complete, save the Excel file as a .csv in the drop down. All columns do not need to be filled in. For example, if only sending phone alerts, only the name and phone numbers are needed.

Importing

After logging into the Stream Alert web interface, users can use the following steps to import a list.

Step 1 - Under List Manager, select 'Distribution' and 'Import'.



Note: Lists imported into List Manager will be saved on the Stream Alert Server. Lists may also be saved via the local network and imported 'on the fly' during the broadcast launch steps. In this case, lists will not be stored on the Stream Alert server.

Step 2 - Browse the files to find the .csv file to import.

Import Distribution

The 'Import Distribution' form includes fields for 'File' (with a 'Browse...' button), 'List Name', 'Type' (set to 'Static'), and 'Shared' (set to 'Share with my company').

Step 3 - Name the list.

Import Distribution

The 'List Name' field is filled with 'Stream Training Reminder'. A red arrow points to the 'Name' field.

Step 4 - Determine how the list will be shared.

The 'Shared' dropdown menu is open, showing options: 'Share with my company', 'Share with everyone', 'Share with my company', 'Share with my department', and 'Not Shared'. A red arrow points to the 'Share with my company' option. A tooltip 'Select How and If You Want Your List Shared.' is visible.

Step 5 - Select 'Import' to import the file.

The 'Import' button is highlighted with a red arrow. A tooltip 'Select 'Import' to Complete' is visible.

The file has been imported when the 'File Import Complete' message appears.

Import Verification

Step 1 - To verify that the list has imported correctly, go back to the 'List Manager' menu and select 'the 'Distribution' sub-menu. Select 'Search' to search for the newly created list.



Step 2 - All lists appear in the search window. Select 'Details' to view the information in the list and 'Update' to revise the information on the list. The list can be removed by checking the adjacent box and selecting "Remove".

Search Distribution Select list(s) to update/delete

<input type="checkbox"/>	List ID	Name	Type	Share Level	Details	Update?
<input type="checkbox"/>	201	1-EIP-1	Static	Share with my company	Details	Update
<input type="checkbox"/>	202	EIP-2	Static	Share with my company	Details	Update
<input type="checkbox"/>	234	John	Static	Share with my company	Details	Update
<input type="checkbox"/>	237	Stream Training Reminder	Static	Share with my company	Details	Update

[REMOVE](#)

Step 3 - When selecting 'Details', the list detail window appears.

Distribution List

List Name:	Stream Training Reminder
List ID:	238
List Type:	Static
Share Level:	Share with my company

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Recipients (displaying 1-2 of 2)

Name	Title	Department	Company	Details	Update?
Tom Johnson				Details	Update
Mary Smith				Details	Update

Stream Alert offers a 'Help' feature within the web interface, which provides a quick reference for the basic features of the list management tool.

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