



## Data Lists: Organizing Information Effectively

Maintaining up-to-date data and making sure it reaches its intended audience is a key component to a company's success. From remembering employee anniversaries to providing customers with a clean menu board, data lists are a great way to communicate crucial information quickly.

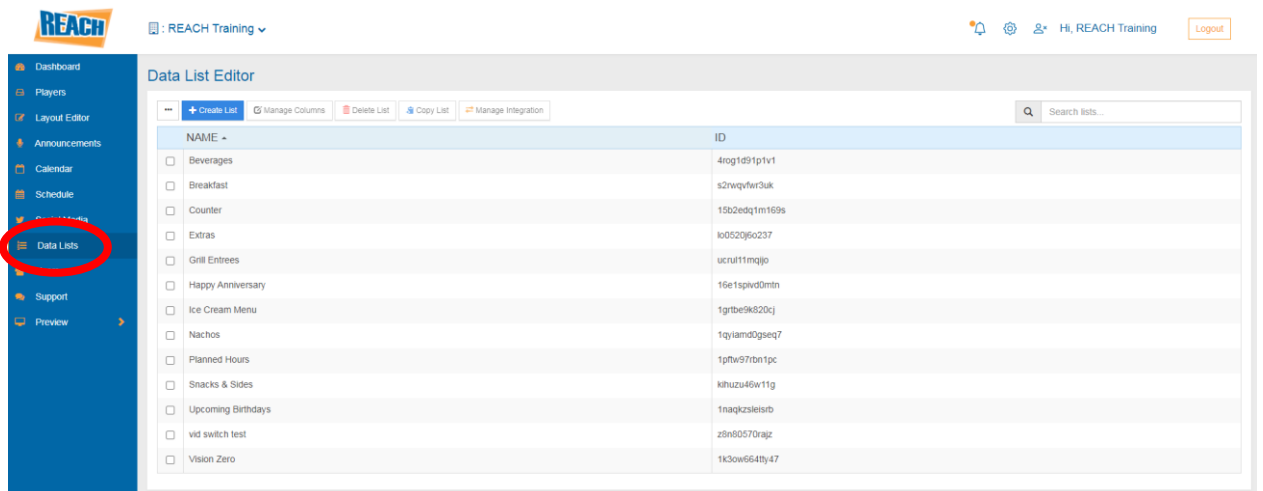
Our Data List tool gives you the ability to create efficient ways to convey material quickly, while also giving you plenty of room for customization.



Within this document, we will go over how to create your own data lists as well as integrate Excel and Google Sheets into our CMS.

## Data List Overview

First, there are some basics to understanding the Data List function. You can find it along the left side of our CMS. If you do not see the data list tool along the left-hand side, please contact your Account Manager and we can easily get the data list tool enabled for your facility.

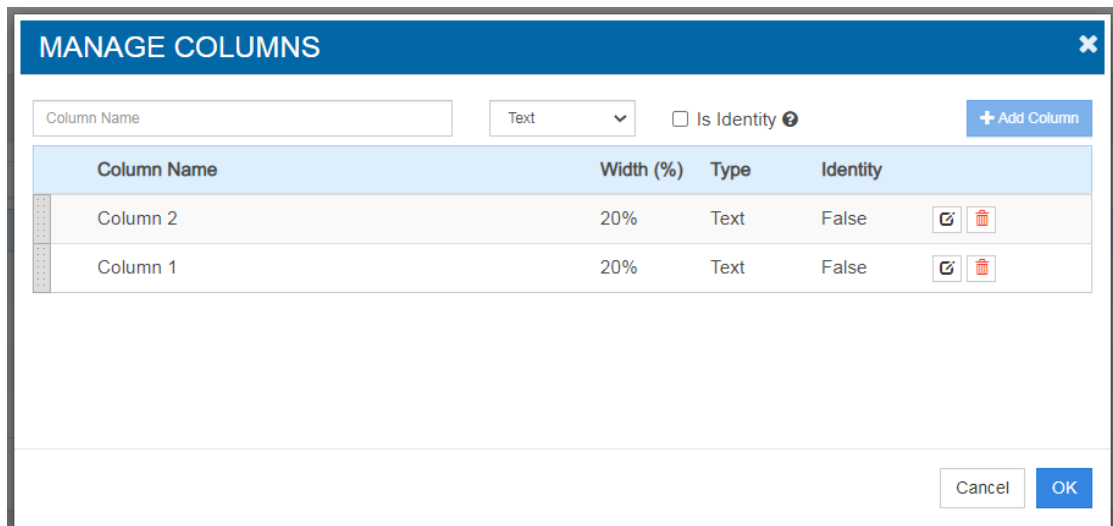


From here you can see all the data lists you have created. At the top of the page, you will notice 6 buttons, each of which will help you manage all your content.



The 3 dots will allow you to toggle which columns of the data lists are visible.

“Create List” will allow you to create a new list right from within our CMS. After selecting the name, you will then be able to add columns here:



You can name each column, as well as determine their width and type. The width determines how much information you can view within each cell of that column. As a default width, we recommend 20% and going from there. For the type of column, you will mostly be using “Text,” as this covers everything from directories, room numbers, simple data, etc. If you are using a menu board with multiple prices, you may want to choose the “Money” option, but the rest are commonly used for custom touch screen implementation.

The “Identity” is what is used as the differentiating factor that can uniquely identify each object in your data list. For instance, if you were making a data list for employee anniversaries, and you had two John Smiths, you would not want to set the “Employee Name” column as the Identity, so you would leave that as “False.” However, if you use employee IDs or have access to their phone numbers, the odds of those being the same are much lower, so that would be a great identity.

Lastly, the two buttons to the left allow you to edit or delete a column with ease. Once everything is set the way you want it, click the “OK” button and your data list will be created.

Once you have your data list created, you can quickly go back and edit your columns by selecting it at the Data List homepage and clicking the “Manage Columns” button at the top. You can also do this by double-clicking your desired data list and then selecting “Manage Columns.”

**Data List Editor**

Buttons: + Create List, Manage Columns, Delete List, Copy List, Manage Integration

NAME	ID
<input type="checkbox"/> Breakfast	s2rwqfvwr3uk
<input type="checkbox"/> Counter	15b2edq1m169s
<input checked="" type="checkbox"/> Drinks	4rog1d91p1v1
<input type="checkbox"/> Extras for Nachos	lo0520j6o237
<input type="checkbox"/> Grill Entrees	ucnu11mqjjo
<input type="checkbox"/> Happy Anniversary	16e1spivd0mtn
<input type="checkbox"/> Ice Cream Menu	1grtbe9k820cj
<input type="checkbox"/> Nachos	1qyiamd0gseq7
<input type="checkbox"/> Planned Hours	1pftw97rbn1pc
<input type="checkbox"/> Snacks & Sides	khuzu46w11g
<input type="checkbox"/> Upcoming Birthdays	1naqkzslsrb
<input type="checkbox"/> vid switch test	z8n80570rajz
<input type="checkbox"/> Vision Zero	1k3ow664ty47

**Drinks**

All Lists / Drinks

Buttons: Manage Columns, Add Row, Copy Row, Delete Row, Manage Integration

Rows: 5

NAME	PRICE
<input checked="" type="checkbox"/> Coffee (Decaf or Regular)	\$2.00
<input checked="" type="checkbox"/> Bottled Soda (Pepsi Products)	\$3.00
<input checked="" type="checkbox"/> Bottled Water	\$3.00
<input checked="" type="checkbox"/> Gatorade	\$3.00
<input checked="" type="checkbox"/> Cup of Ice	\$0.50

Selecting a list and clicking “Delete List” will delete the entirety of that list. Before choosing this option, make sure that data is no longer needed or is safely stored in another location for future use.

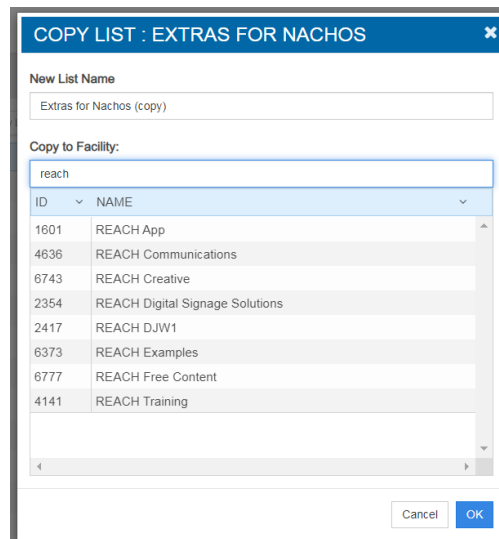
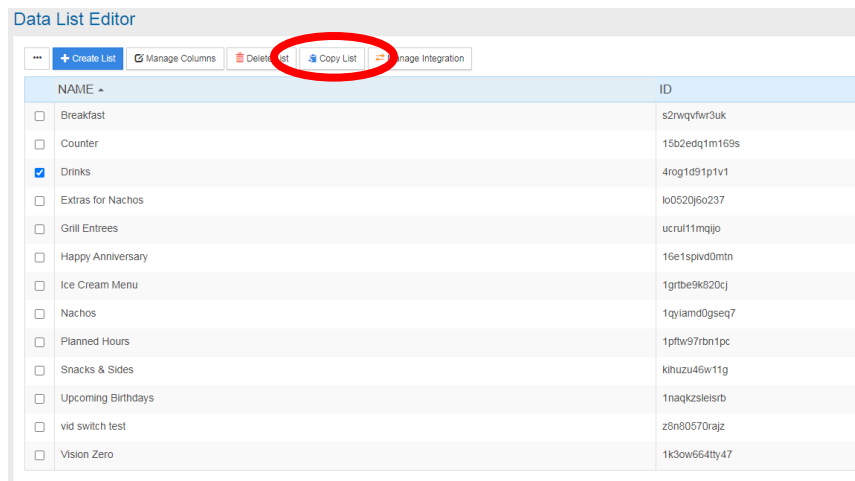
**Data List Editor**

Buttons: + Create List, Manage Columns, Delete List, Copy List, Manage Integration

NAME	ID
<input type="checkbox"/> Breakfast	s2rwqfvwr3uk
<input type="checkbox"/> Counter	15b2edq1m169s
<input checked="" type="checkbox"/> Drinks	4rog1d91p1v1
<input type="checkbox"/> Extras for Nachos	lo0520j6o237
<input type="checkbox"/> Grill Entrees	ucnu11mqjjo
<input type="checkbox"/> Happy Anniversary	16e1spivd0mtn
<input type="checkbox"/> Ice Cream Menu	1grtbe9k820cj
<input type="checkbox"/> Nachos	1qyiamd0gseq7
<input type="checkbox"/> Planned Hours	1pftw97rbn1pc
<input type="checkbox"/> Snacks & Sides	khuzu46w11g
<input type="checkbox"/> Upcoming Birthdays	1naqkzslsrb
<input type="checkbox"/> vid switch test	z8n80570rajz
<input type="checkbox"/> Vision Zero	1k3ow664ty47

The “Copy List” button will allow you to copy the contents of a list and transfer them to another facility. Once you select it, a pop-up will appear that will allow you to either select or type in the facility you wish to transfer it to. Press “OK” and the list will be transferred to that location’s Data List tab. This is a great tool for sharing data across multiple locations.

**IMPORTANT NOTE:** Making a change on a copied data list will also affect the original data list as well. To ensure your messaging remains consistent, be sure to edit who has access to your data lists under the “Users” tab.

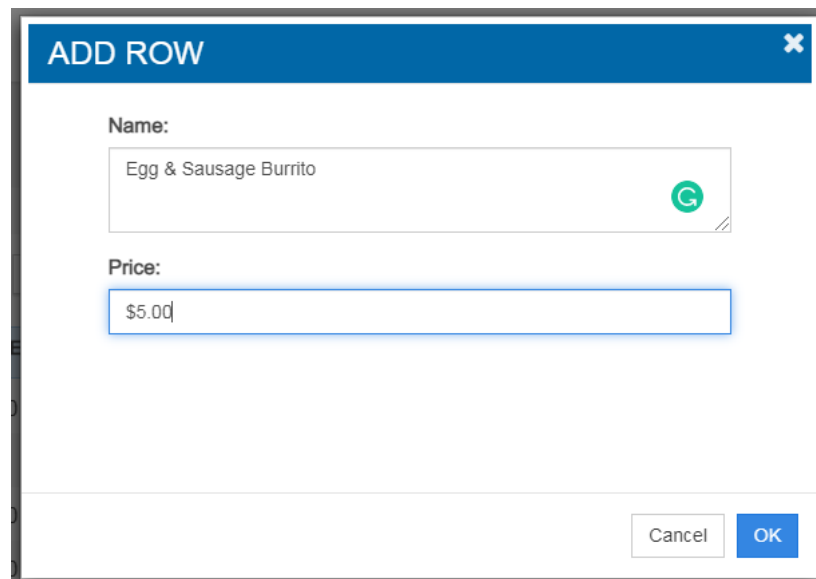


The “Manage Integrations” button allows you to integrate data already created in Excel spreadsheets into our CMS, which we will go over later.

## Editing Data Lists

Once you select a data list you want to edit, there are a variety of options that will help you easily add/remove/change items tied to each one. We have already gone over the “Manage Columns” button, so now we will focus on the other tools at your disposal.

Next to “Manage Columns” is the “Add Row” button. This lets you add content that will fall under each column. For instance, below we have a breakfast menu. By using this feature, we can quickly add exciting new menu items, such as a delicious egg & sausage burrito! Once you enter all the information for each column, just press “OK” and it will be added to the list.



ADD ROW

Name:  
Egg & Sausage Burrito

Price:  
\$5.00

Cancel OK

By default, new items will be added to the bottom of the list. If you want to change the order of your items, click the item you want to move and drag it to the spot you want it to occupy.

All Lists / Breakfast

Manage Columns Add Row Copy Row Delete Row Manage Integration Rows: 6

	NAME	PRICE
<input type="checkbox"/>	Bagel	\$2.00
<input checked="" type="checkbox"/>	Egg & Sausage Burrito	\$5.00
<input checked="" type="checkbox"/>	With Cream Cheese/Butter	
<input checked="" type="checkbox"/>	Sausage, Egg & Cheese Sandwich	\$4.00
<input checked="" type="checkbox"/>	Muffin	\$2.00
<input checked="" type="checkbox"/>	Granola Bar	\$1.50
<input checked="" type="checkbox"/>	Egg & Sausage Burrito	\$5.00

All Lists / Breakfast

Manage Columns Add Row Copy Row Delete Row Manage Integration Rows: 6

	NAME	PRICE
<input checked="" type="checkbox"/>	Bagel	\$2.00
<input checked="" type="checkbox"/>	Egg & Sausage Burrito	\$5.00
<input checked="" type="checkbox"/>	With Cream Cheese/Butter	
<input checked="" type="checkbox"/>	Sausage, Egg & Cheese Sandwich	\$4.00
<input checked="" type="checkbox"/>	Muffin	\$2.00
<input checked="" type="checkbox"/>	Granola Bar	\$1.50

Next is the “Copy Row” button. This creates a copy of the row you have selected. Remember, when a row is copied, it will always appear at the bottom of the list, but you can rearrange this as you please. Additionally, copied items can also be edited. So, if you have two different items of the same price, you can copy the first item and then simply edit the name.

The screenshot shows a data management interface for a list titled "Breakfast". At the top, there are navigation links "All Lists / Breakfast" and a toolbar with buttons: "Manage Columns", "+ Add Row", "+ Copy Row" (circled in red), "Delete Row", and "Manage Integration". A "Rows: 7" indicator is on the right. Below the toolbar is a table with columns "NAME" and "PRICE". The table contains seven rows of breakfast items, with the second and seventh rows highlighted in orange.

	NAME	PRICE
<input type="checkbox"/>	Bagel	\$2.00
<input type="checkbox"/>	Egg & Sausage Burrito	\$\$5.00
<input type="checkbox"/>	With Cream Cheese/Butter	
<input type="checkbox"/>	Sausage, Egg & Cheese Sandwich	\$4.00
<input type="checkbox"/>	Muffin	\$2.00
<input type="checkbox"/>	Granola Bar	\$1.50
<input type="checkbox"/>	Egg & Sausage Burrito	\$\$\$5.00

Then you have the “Delete Row” button, which will delete all the rows you have selected.

## Managing Integrations

In addition to creating Data Lists from scratch, you can also integrate them from a Microsoft Excel spreadsheet you have already created. As an example, we will use the mini directory shown below.

The screenshot shows a Microsoft Excel spreadsheet with a mini directory. The spreadsheet has four columns: "Name", "Department", "E-Mail", and "Phone number". The data is as follows:

Name	Department	E-Mail	Phone number
Michelle White	Marketing	<a href="mailto:mwhite@reachmedianetwork.com">mwhite@reachmedianetwork.com</a>	952-123-4567
Tristan Helleen	Marketing	<a href="mailto:thelleen@reachmedianetwork.com">thelleen@reachmedianetwork.com</a>	952-789-0123
Ella Glaser	Account Manager	<a href="mailto:eglaser@reachmedianetwork.com">eglaser@reachmedianetwork.com</a>	952-456-6709
Brian Rose	Support	<a href="mailto:brose@reachmedianetwork.com">brose@reachmedianetwork.com</a>	952-223-5678

Notice the titles of each column. To integrate this spreadsheet into the REACH CMS, it is important to understand that the way the titles are spelled in your spreadsheet must be IDENTICAL to how you spell them in the CMS. Having a letter capitalized in the spreadsheet but not the CMS, or vice versa, will break the integration. Additionally, you must refrain from using special characters such as hyphens and semicolons, as those would also break the integration.

Once you have your Excel spreadsheet the way you want it, open the REACH CMS and create a new data list. For the type, set every column to "Text." Even if you are integrating a menu board with prices from Excel or a phone directory, it will still read it as simple text rather than a numerical value. Again, make sure the spelling of each column matches that from your spreadsheet. Once they are entered in, click the "Create List" button.

**CREATE DATA LIST**

List Name:  Copy Columns from:

Add Columns

Column Name:

Width:  % Type:

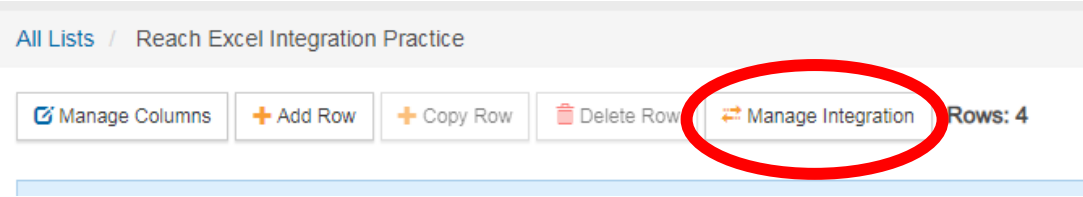
[+ Add Column](#) [- Reset Columns](#)

**Datalist Columns**

Title	Type	Width
Name	TEXT	20%
Department	TEXT	*
Email	TEXT	*
Phone number	TEXT	*

Set which column will be your "Identity." Remember, this should be something that will always have unique properties and will not repeat, such as phone numbers or employee emails.

Once the Data List is created, select the “Manage Integrations” button along the top row.



A pop-up will appear that will list any current integrations you have set up. Select the “Add Integration” button from the top-left. You will then be redirected to the below page. Enter the name of the data you are transporting, choose the file type and select your transport method. We have found that uploading an excel file is the most popular method, so that is what we will do for this example. However, if you would like any additional information on the other data types and transport methods, feel free to reach out to us!

The 'MANAGE INTEGRATIONS' window has a blue header with a close button (X). Below the header is a 'Properties' tab and a 'Show Advanced Tabs' link. The form contains the following fields:

- Name:** Excel
- Data Type:** Excel File
- Transport:** Upload

Below the form is a table with the following data:

Field Name	Field Type	Unique
Name	TEXT	false
Department	TEXT	false
EEmail	TEXT	true
Phone number	TEXT	false

At the bottom right of the window are two buttons: 'Create' (blue) and 'Cancel' (orange).



After double-checking all the information is correct and clicking “Create,” all that is left is uploading the file. Choose the file from your computer and press “Submit.” Clicking the “Job History” tab will allow you to see when the integration was created, started and last modified, as well as the status of its submission. After it is successfully submitted, click “Save & Close” and you should see it fully integrated into your Data List tab!

◀NAME▶	◀DEPARTMENT▶	◀EMAIL▶	◀PHONE NUMBER▶
Michelle White	Marketing	mwhite@reachmedianetwork.com	952-123-4567
Tristan Helleen	Marketing	thelleen@reachmedianetwork.com	952-789-0123
Ella Glaser	Account Manager	eglaser@reachmedianetwork.com	952-456-6709
Brian Rose	Support	brose@reachmedianetwork.com	952-223-5678

**IMPORTANT NOTE:** If changes are made to the original Excel spreadsheet, our system will not be able to automatically detect that. If you would like to add changes made to an excel spreadsheet, upload the updated file and it will reintegrate into our system.