Product integrations – List Product Integration

|  |  |
| --- | --- |
| Script | Direction |
| The campusM List Product Integration can be used for a wide range of applications, such as showing key dates, providing a searchable form bank for students, or offering a to-do list for students registering at the university.  This example shows a student's checklist for orientation. The list is divided into categories. You can expand an individual item to view its description, and check items to mark them as complete, with indication in the progress bar. Items can be starred to be added to the Favorites tab. You can also search for items in the list.  In this session, we will demonstrate how to create and configure a List integration, and how to deploy it to the user's homescreen via a Menu Option. |  |
| Let's create a student orientation checklist.  To create a new integration, go to Product Integrations. Click Add Product Integration Instance.  For the Product Integration Type, select List. | As described |
| In the List configuration page, check Enable Product Integration.  Give the integration a name; in our case: Orientation Checklist.  Now for some general configurations of our list.  You can add a Preliminary Filters Page to prefilter the list before viewing it. We won't do this now.  We will enable the option to star list items as Favorites.  Let's Enable Checklist so that check boxes will appear on the items.  We can enable a progress bar on the entire list, or have an individual progress bar for each category. We won't enable due dates for tasks, and we will make the list searchable. | As described |
| Next, we need to define the Data Source for the list.  The list items can be derived dynamically through the RESTful API, more on this in the documentation.  In this example, we will manually set up our list categories and items. So, for Vendor Name we select Configuration. | Highlight [CKC article](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/Managing_Product_Integrations/List) |
| We can now see the Categories and Items section. Categories allow you to create blocks of list items, to help navigation. Let's add our first category and give it a title.  If you'd like the items in this category to have actions associated with them, such as expanding to show a description, or opening a URL, you can configure that here. Select None for simple list items that don't do anything when clicked.  Now within our category, we can add our list items.  You can add more items and categories as needed. | Cat Name: Get Ready for Class!  Item Name: Meet with your counselor.  Item Name: Review the reading list.  Maybe complete the first category and item here |
| Here you can enable the List Integration to appear as a Live Tile, which displays the categories on the tile.  Fill in other settings relating to look and feel, text labels, etc. Further details on these settings can be found in the Ex Libris Knowledge Center.  You can Import or Export the entire list configuration using a JSON file. This can help you quickly populate your list based on a previously exported list, instead of adding all the items and categories manually.  Once happy with your configuration of the List integration, click Save.  Our new Product Integration Instance has been added. | Use this file to create the complete list. Import the config into the instance you created for instant list fun! |
| Next, let's deploy our List integration to the end-user via a Menu Option. |  |
| Go to App Builder. In the Menu Options section, click Add. For the Menu Option type, select Product Integrations Tile. For the integration instance, select your newly created List integration. Give the tile a name, and click Create. Our new tile has been created. Note that the preview only displays the tile name, but the actual Live Tile on the app will display custom information, such as the categories.  We can stylize this tile, as we would any other tile. This is where you can use Roles to define that only first-years will see this list. When done customizing the tile, click Save & Publish. The tile will now appear on the user's homescreen. | Name: Orientation Checklist |
| You should now be able to quickly create and deploy the List integration. Thanks for joining! |  |