

**App Configuration Checklist**

**Objective**

The objective of this checklist is to verify that essential configuration needed for launching the App is completed.

The configuration listed below is verified by the customer during implementation. Progress is reviewed in the project status calls.

# General Settings

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Add a welcome message**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/010App_Settings_Section#General_Settings) - appears on the Profile screen when the user logs on to the app. The message is the same across all platforms and for all users (optional) | App Manager > App Settings > App Settings section > General Settings | [ ]  | [ ]  |  |
| [**Configure email templates**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/010App_Settings_Section#General_Settings) - enables the app to send standard responses to certain actions undertaken by the end user e.g. forgotten password (optional) | App Manager > App Settings > App Settings section > Email Templates | [ ]  | [ ]  |  |
| [**Upload app icons**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/010App_Settings_Section#App_Device_Icons) - these are images that are displayed above the App Name on the home screen of the device. It is also used in the app store to represent the app | App device icons should be uploaded to:App Manager > App Settings > App Settings section > App Device Icons | [ ]  | [ ]  |  |
| [**Update authentication failure message**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/010App_Settings_Section#Profile_Registration_Authentication) – this is the message the end user receives if they fail to supply the correct credentials (for authenticated profile) | App Manager > App Settings > App Settings section > Profile Registration Authentication | [ ]  | [ ]  |  |

# Feedback

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Create the problem app categories**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/120Feedback_Section#Problem_App_Categories) - these are the available options from the Report a Problem function under Feedback for App(optional) | App Manager > App Settings > Feedback section > Problem App Categories | [ ]  | [ ]  |  |
| [**Create the problem page categories**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/120Feedback_Section#Problem_Page_Categories)- these are the available options from the Report a Problem function under Feedback for Page(optional) | App Manager > App Settings > Feedback section > Problem Page Categories | [ ]  | [ ]  |  |
| [**Update the contact email addresses**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/120Feedback_Section#Contact_Email_Addresses) - when feedback is submitted it is forwarded via email to the recipient configured for each App Profile for the three different types of feedback (optional) | App Manager > App Settings > Feedback section > Contact Email Addresses | [ ]  | [ ]  |  |

# Sharing

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Update Facebook settings**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/130Sharing_Section#Facebook_Settings) – enables the end user to share a specific page in the app or the app itself using Facebook (optional) | App Manager > App Settings > Sharing section > Facebook Settings | [ ]  | [ ]  |  |
| [**Update Twitter settings**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/130Sharing_Section#Twitter_Settings) – enables the end user to share a specific page in the app or the app itself using Twitter (optional) | App Manager > App Settings > Sharing section > Twitter Settings | [ ]  | [ ]  |  |
| [**Update email settings**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/130Sharing_Section#Email_Settings)– enables the end user to share a specific page in the app or the app itself using Email (optional) | App Manager > App Settings > Sharing section > Email Settings | [ ]  | [ ]  |  |

# Content Management

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Add Pocket Guides and other static content**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/060Content_Management_Section) - this is where you can add static content such as an introduction to the institution or library guides etc and publish the changes directly to the app (optional) | App Manager > App Settings > Content section > Content | [ ]  | [ ]  |  |
| [**Add About page**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/060Content_Management_Section)- the About information is designed specifically for the app guide information attached to the App Profile and is available from the Settings menu in the app | App Manager > App Settings > Content section > Content | [ ]  | [ ]  |  |
| [**Add Intro to App**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/060Content_Management_Section) - this information is attached to the App Profile and gives a device specific (iPad, iPhone, Android) introduction or overview of the app | App Manager > App Settings > Content section > Content | [ ]  | [ ]  |  |

# App Builder

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Update the App Config**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/070App_Config_Section) - this sets the default settings for the app, such as the [background color](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/070App_Config_Section#Background_Color), [header background color](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/070App_Config_Section#Header_Background_Color), [tile spacing](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/070App_Config_Section#Tile_Spacing) etc | App Manager > App Builder > App Config > Config | [ ]  | [ ]  |  |
| **Update the Header Image** – this is displayed at the top of the device screen or web app. This can be set for the [app](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/070App_Config_Section#Header_Image), [profiles](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#Header_Image) and iOS devices ([iPad - landscape](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#iPad_Header_(landscape)), [iPad – portrait](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#iPad_Header_(portrait)) and [iPhone](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#iPhone_Header_Image)) | App Manager > App Builder > App Config > ConfigApp Manager > App Builder > Profile Config > Config App Manager > App Builder > Profile Config > iOS Config | [ ]  | [ ]  |  |
| **Update the iOS Config** – this defines properties specific to iOS devices such as the color for the icons on the toolbar, navigation buttons and iOS header text for the [app](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/070App_Config_Section#iOS_Config_Section) and [App Profile](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#iOS_Config_Section). | App Manager > App Builder > App Config > iOS ConfigApp Manager > App Builder > Profile Config > iOS Config | [ ]  | [ ]  |  |
| [**Update the Profile Config**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section) – this sets the default settings for the App Profile such as the [background color](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#Background_Color), [header background color](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#Header_Background_Color), [tile spacing](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#Tile_Spacing) etc | App Manager > App Builder > Profile Config > Config | [ ]  | [ ]  |  |
| **Assign the Tile roles** – ensure that the appropriate App Roles for the App Profile have been assigned to the menu tile | App Manager > App Builder > Menu Options > *Menu Option Name* > Menu Option Config > Roles | [ ]  | [ ]  |  |
| [**Update the Recent Icons**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/080Profile_Config_Section#Recents_Indicator_Image) – this appears on both iOS and Android apps and displays in the Recents menu for menu tiles that have been used most recently by the end user. | App Manager > App Builder > Menu Options > *Menu Option Name* > Menu Option Config > Recents Icon | [ ]  | [ ]  |  |
| [**Update the Tile icons**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/100Menu_Options_Section_-_Configuring_Tiles#Icon) – if you are using icons to indicate the nature of the menu tile, select the files from Asset Manager and configure the [alignment](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/100Menu_Options_Section_-_Configuring_Tiles#Icon_Align), [image fit](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/100Menu_Options_Section_-_Configuring_Tiles#Image_Fit) and [label display](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/100Menu_Options_Section_-_Configuring_Tiles#No_Label) | App Manager > App Builder > Menu Options > *Menu Option Name* > Tile Config | [ ]  | [ ]  |  |
| [**Configure the Tile height/width**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/100Menu_Options_Section_-_Configuring_Tiles#Tile_Height.2FWidth) - Use the tile height and tile width properties to select the appropriate tile size. Note: A mobile device can only support a display up to three columns wide | App Manager > App Builder > Menu Options > *Menu Option Name* > Tile Config | [ ]  | [ ]  |  |

# Maps and Locations

Bulk load of Maps and Location is done by the implementation team based on the [Maps and Locations form](https://knowledge.exlibrisgroup.com/%40api/deki/files/57671/Maps_and_Locations_Form.xlsx?revision=1). The below refers to manual updates, if needed.

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Add Campus Maps**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/090Maps//Locations_Section#Campus_Maps) – the map image must be orientated north, to scale and less than 1Mb in size. It is also recommended that the longer side is restricted to 1500px | App Manager > App Settings > Maps/Locations section > Campus Maps | [ ]  | [ ]  |  |
| [**Add Location Categories**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/090Maps//Locations_Section#Location_Categories) - are used to categorize buildings/locations and each building/location can have more than one category. A list of Location Categories appears in the mobile app with the corresponding campus map | App Manager > App Settings > Maps/Locations section > Location Categories | [ ]  | [ ]  |  |
| [**Add Positions**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/090Maps//Locations_Section#Positions) – supplies the end user with location information. In the mobile app, the end user accesses the list of Location Categories and the number of positions that match the Category is indicated in brackets | App Manager > App Settings > Map/Locations section > Positions | [ ]  | [ ]  |  |
| [**Add Position Actions**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/090Maps//Locations_Section#Position_Actions) - this invokes another action by the app associated with a specific Position e.g. linking to another tile or another Position | App Manager > App Settings > Maps/Locations section > Position Actions | [ ]  | [ ]  |  |

# RSS Feeds

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Create RSS feeds for the news tile**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/080News//Events//Comms_Section#RSS_Feeds) - Individual feeds are set up via App Settings. It is configured for the end user as a default feed or is selected from a menu option (optional) | App Manager > App Settings > News/Events/Comms section > RSS Feeds | [ ]  | [ ]  |  |
| [**Create Feeds tile**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/060App_Builder_Module/090Menu_Options_Section#Feeds_Tile) - RSS feeds are presented to the end user as a dynamic tile configured in App Builder (optional) | App Manager > App Builder | [ ]  | [ ]  |  |

# Notifications

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| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Set up Alert Group Categories**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/080Notifications_Module#Alert_Group_Categories) - are used to organize the Alert Groups (optional) | App Manager > Notifications > Alerts/Notifications section > Alert Group Categories | [ ]  | [ ]  |  |
| [**Set up Alert Groups**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/080Notifications_Module#Alert_Groups) - Notifications can be sent to groups using Alert Groups and each Alert Group is given a Description and associated with an Alert Group Category. (optional) | App Manager > Notifications > Alerts/Notifications section > Alert Groups | [ ]  | [ ]  |  |

# Other

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| --- | --- | --- | --- | --- |
| **Task** | **Settings** | **Done** | **NA** | **Comments** |
| [**Create iOS Splash Pages**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/050App_Settings_Module/050iOS_Splash_Pages_Section) - is the image that is displayed the first time the app is opened on iOS devices e.g. iPhone and iPad whilst the tiles are loading (optional) | App Manager > App Settings > iOS Splash Pages section | [ ]  | [ ]  |  |
| [**Asset Manager**](https://knowledge.exlibrisgroup.com/campusM/Product_Documentation/070Asset_Manager) - Ensure the correct files (images/CSS etc) have been uploaded | App Manager > Asset Manager | [ ]  | [ ]  |  |