

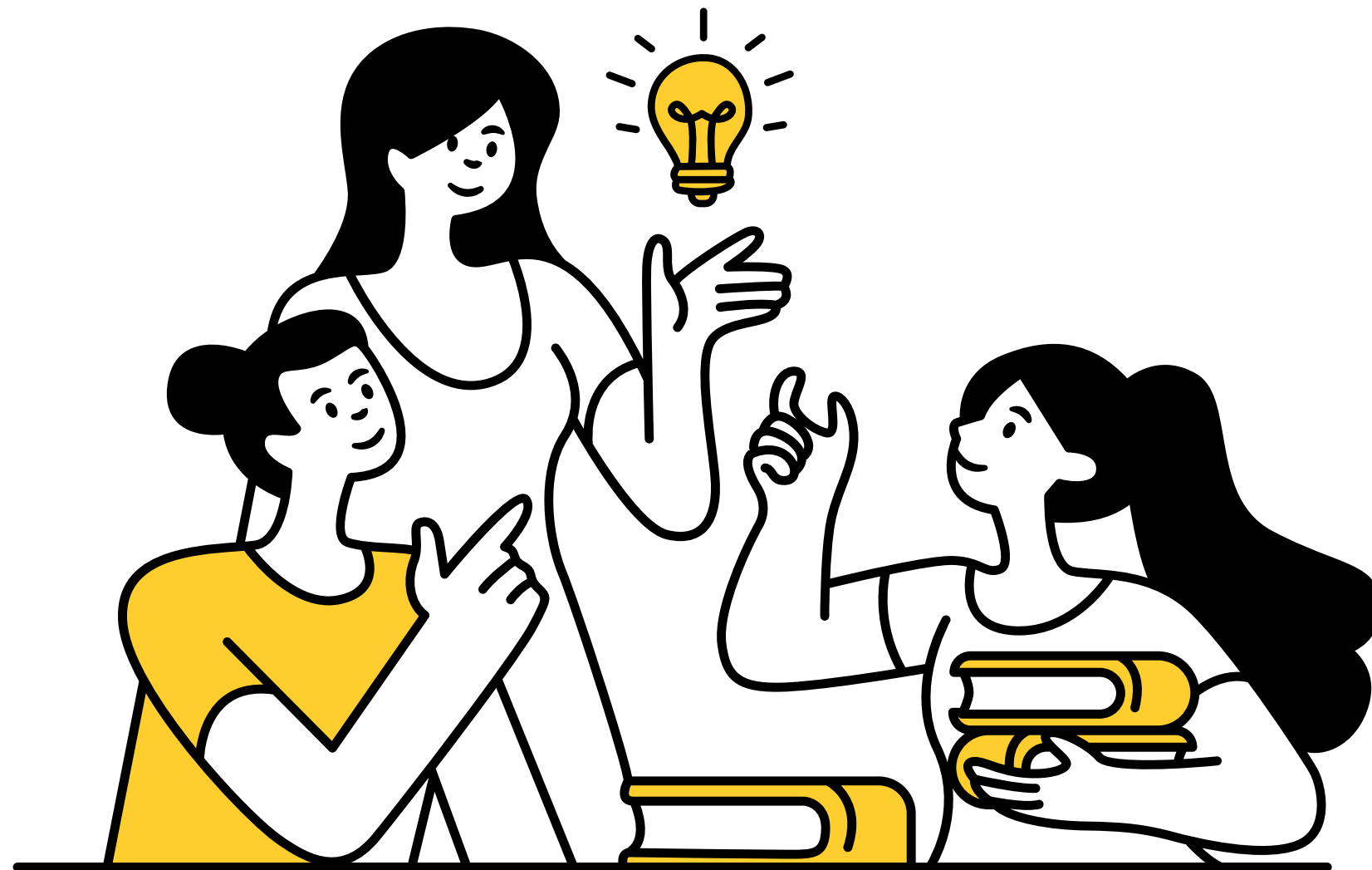


Library IPA Implementation



Program discovery

Gathering Information



- To get started, we need to gather some information regarding the library.
- This information is crucial for setting up your library profile and preferences.

Instructions

- **Click on Download template**

- To ensure you always have the latest version of the template for creating a new library, make sure to go back to the portal and download the template each time you make a request. This practice guarantees that you're using the most updated version.

Download Template

- **Mandatory Fields:** When you open the document, you will see fields highlighted in red. As you enter information into these fields, they will turn green.

Username:

Username:

CGS

- **Fields in Red:** *Do not send us the Excel document until all rows highlighted in **RED** have turned **GREEN**.* Also, please make sure to get all the branch names and abbreviations in the second tab.

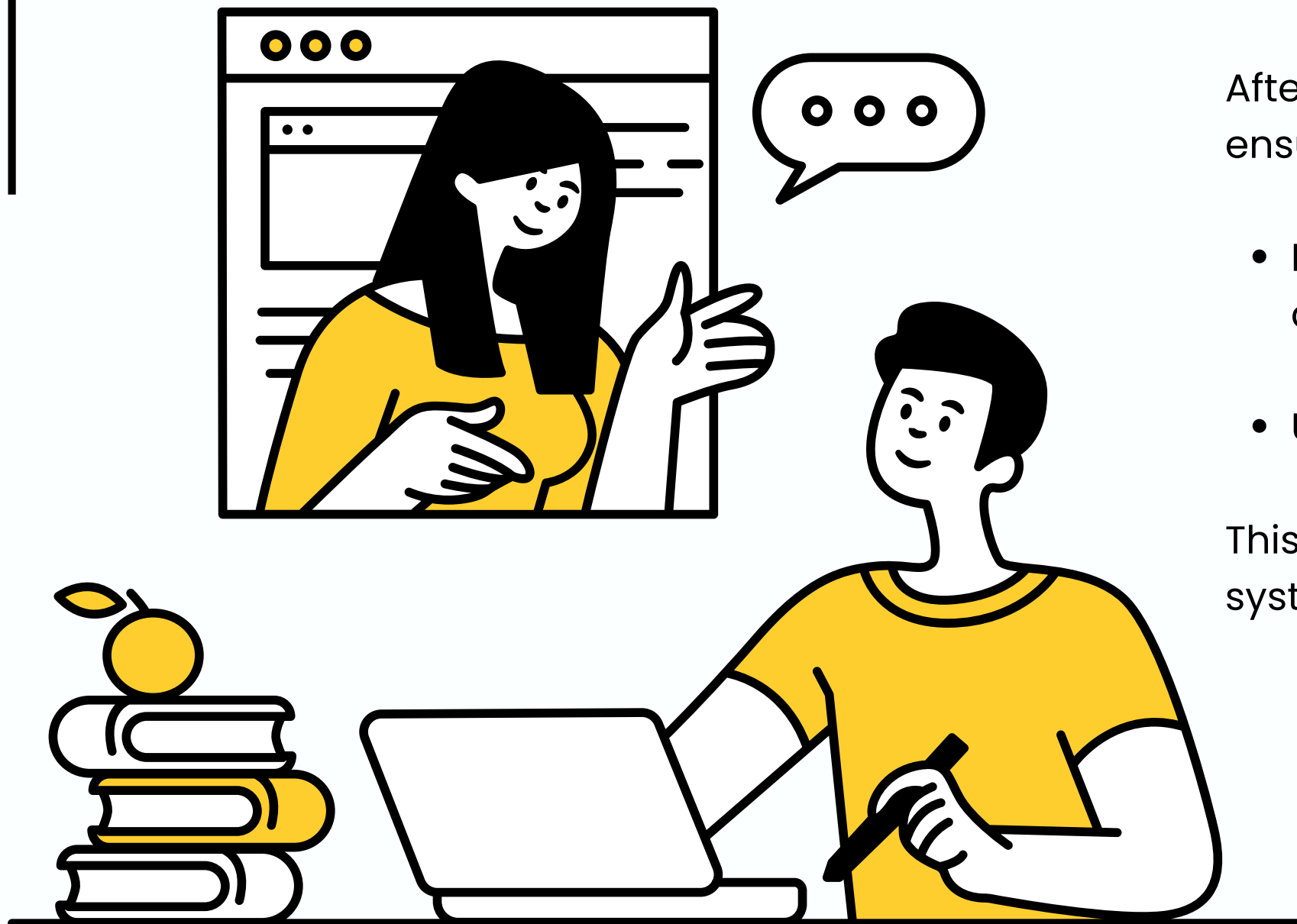


Upload:

After completing the Excel document that you have downloaded and ensuring all mandatory fields have turned green, please do the following:

- Enter the new library name, your name, your email, and any notes or comments you would like us to address.
- Upload the verified Excel document.

This allows us to start working on the configuration file for your library system.



Notification Change Request

- Copy all messages from your original Excel document.
- Enter the new message in the correct field. Highlight the new message in yellow to distinguish it from the original.
- Rename the document with the appropriate version number (e.g., v1, v2). This helps us track changes and ensures the correct message version is implemented.
- After completing the form, please open a ticket at <https://support.cgsis.com>.
- Provide detailed information to ensure we apply changes correctly.



Guidelines

Supported Actions:

- Hold: Placing a hold on an item.
- Hold Cancel: Canceling a previously placed hold.
- Overdue: Notifications for overdue items.

Unsupported Actions:

- Fee-related actions are not supported. Avoid including them in your production.

Avoid Duplicates:

- Do not reuse titles, even in separate instances, to prevent message generation issues.

Message Content:

- Avoid Book Titles: Refrain from using %%title%% for books.
- Clarity and Precision: Messages should be clear and concise. Use the provided template and request changes as needed.

Note:

- The Polaris CI interface processes notification requests from the ILS and generates messages accordingly.



Support

For assistance, please open a ticket at <https://support.cgsis.com>

Please allow 3 business days for us to create the configuration of your library and get back to you with any questions or to notify you when we are ready.

For any further requests not already noted, please open a ticket.

