



# Alma's New Letter Editing Features

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# Agenda

- Discuss changes to letter editing in August and November Alma releases
- Live demo of letter editing and testing
- Presentation assumes some previous knowledge of letter editing
- Please save questions about specific letters until end of session!

# Changes to Letter Editing in Alma

- **Letter Configuration** and **Letter Components** functions introduced in August 2019
- Mainly consolidated older functions, but some new functionality was introduced
- Older functions were initially left in place but were removed in the November 2019 release

# Letter Functions No Longer Available

- Letter Emails
- Letter Activity
- Letter Retention
- Notification Template
- XML to Letter Admin
- Customize Letters

# Letter Functions No Longer Available

- functionality replicated in **Letter Configuration** and **Letter Components** functions
- new functions more intuitive
- easier to obtain sample XML
- easier to send test emails
- no improvements to template editing (still must use XSL)

# How Letters Work

- Alma creates an XML file with all relevant data whenever an event that triggers a letter occurs
- Alma then uses an XSL template to convert the data from the XML file into an email
- XSL templates can call other XSL templates (components)

# Where to Find New Letter Editing Functions

- Configuration | General | Letters
- Roles Needed:
  - General System Administrator
  - Letter Administrator

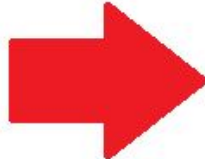
Configuring

SUNY Polytechnic Institute

Filter List

Look-up or select

Libraries	User Interface Settings	Letters
<a href="#">Add a Library or Edit Library Information</a>	<a href="#">Alma Logo and Color Scheme</a>	<a href="#">Letters Configuration</a>
<a href="#">Relationships</a>	<a href="#">Social Login Labels</a>	<a href="#">Components Configuration</a>
<a href="#">Define Campuses</a>	<a href="#">Identity Service Labels</a>	



# Activating and Deactivating Letters

- done through **Letter Configuration** function
- letters are still toggled on and off

	Enabled	▲ Letter	↕ Description
1	<input type="checkbox"/>	Analytics Letter	Analytics Letter
2	<input checked="" type="checkbox"/>	Borrowed By Letter	Due Items
3	<input checked="" type="checkbox"/>	Borrower Overdue Email Letter	Borrower Overdue Email Letter
4	<input type="checkbox"/>	Borrower Receive Email Letter	Borrower Receive Email Letter



# Editing Letter Labels

- done through **Letter Configuration** function
- labels still function the way they always have

	Enabled	Code	Description
1	<input type="checkbox"/>	letterName	Analytics Automatic Email
2	<input type="checkbox"/>	letterText	Attached please find the following Analytics report to
3	<input checked="" type="checkbox"/>	addressFrom	library@sunypoly.edu

# Letter Letter Templates

- done through **Letter Configuration** function
- templates still function the way they always have

```
Restore Managed in Network: No
XSL: <?xml version="1.0" encoding="utf-8"?>
      <xsl:stylesheet version="1.0"
        xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
        <xsl:include href="header.xsl" />
        <xsl:include href="senderReceiver.xsl" />
        <xsl:include href="mailReason.xsl" />
        <xsl:include href="footer.xsl" />
        <xsl:include href="style.xsl" />
        <xsl:include href="recordTitle.xsl" />
        <xsl:template match="/">
```

# Editing Letter Components

- headers & footers no longer mixed in with other letter templates
- configured through **Letter Components** function
- process for configuration unchanged

# Testing Letters

- major improvements
- done through the Letter Examples tab of the **Letter Configuration** function
- much easier to obtain example XML
- example XML can be stored for future use
- much easier to send test emails

# Testing Letters

< Resource Sharing Shipping Slip Letter

Preview Letter

Cancel

Save

Labels

Template

Letter Examples

**i** Here you can upload and edit letter examples.

[Click here to view letter examples.](#)

**+** Add from system letters

Upload letter example (XML) ▾



Letter Example	Last Updated	Default Preview	
1. DefaultLetter.xml	11/19/2019	<input type="radio"/>	...
2. ResourceSharingShippingSlipLetter - 11/14/2019 11:41:57 EST	11/19/2019	<input checked="" type="radio"/>	...

# Testing Letters



## Letter Preview

Send Example by Email

**SUNY POLYTECHNIC INSTITUTE**

### Resource Sharing Shipping Slip Letter

11/14/2019

**Supplied To:** SUNY Purchase  
**Borrower Reference:** 01SUNYPUR0000643  
**External ID:** group\_qualifier  
**Title:** Africa : a biography of the continent /  
**Author:** Reader, John.  
**Item Barcode:** Barcode1

**SUNY Polytechnic Institute**



Return To:	Polytechnic Institute, SUNY Peter J. Cayan Library 100 Seymour Road Utica, NY , 13502 YTM - Hub: SYR
Ship To:	<b>Purchase, SUNY Library</b> 705 Anderson Hill Road






# Setting Retention Periods for Letters

- Letters sent to users are stored in the Attachments tab of their user record
- Letters remain there indefinitely unless letter retention periods are set
- letter retention periods set through the **Letter Configuration** function
- Letters deleted by **Letters Purge With Retention** job
- **Submit case to Ex Libris to activate this job!**

# Setting Retention Periods for Letters

Letters Configuration Cancel Save

1 - 50 of 113 Restore letters' retention table  

	Enabled	Letter	Description	Channel	Retention Period	Managed in Network	Customized	
1	<input type="checkbox"/>	Analytics Letter	Analytics Letter	EMAIL	<input type="text"/>	-	✓	
2	<input checked="" type="checkbox"/>	Borrowed By Letter	Due Items	EMAIL	<input type="text"/>	-	✓	
3	<input checked="" type="checkbox"/>	Borrower Overdue Email Letter	Borrower Overdue Email Letter	EMAIL	<input type="text"/>	-	✓	
4	<input type="checkbox"/>	Borrower Receive Email Letter	Borrower Receive Email Letter	EMAIL	<input type="text"/>	-	✓	
5	<input type="checkbox"/>	Borrower Return Email Letter	Borrower Return Email Letter	EMAIL	<input type="text"/>	-	✓	



# Demo and Questions

## **FAQ:**

<https://slcny.libanswers.com/faq/277717>

## **Evaluation:**

<https://slcny.libwizard.com/f/training-evaluation>