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:
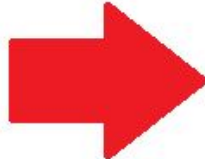 - General System Administrator
  - Letter Administrator

Activating and Deactivating Letters

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

	Enabled	▲ Letter	⇵ Description
1	(off)	Analytics Letter	Analytics Letter
2	(on)	Borrowed By Letter	Due Items
3	(on)	Borrower Overdue Email Letter	Borrower Overdue Email Letter
4	(off)	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		letterName	Analytics Automatic Email
2		letterText	Attached please find the following Analytics report to
3		addressFrom	library@sunypoly.edu

Letter Letter Templates

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

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	○	...
2.	ResourceSharingShippingSlipLetter - 11/14/2019 11:41:57 EST	11/19/2019	●	...

# Testing Letters

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 though 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	⬜	Analytics Letter	Analytics Letter	EMAIL		-	✓	⋯
2	🔵	Borrowed By Letter	Due Items	EMAIL		-	✓	⋯
3	🔵	Borrower Overdue Email Letter	Borrower Overdue Email Letter	EMAIL		-	✓	⋯
4	⬜	Borrower Receive Email Letter	Borrower Receive Email Letter	EMAIL		-	✓	⋯
5	⬜	Borrower Return Email Letter	Borrower Return Email Letter	EMAIL		-	✓	⋯

Demo and Questions

FAQ:
https://slcny.libanswers.com/faq/277717

Evaluation:
https://slcny.libwizard.com/f/training-evaluation