Alma Administration – General  
Letters Configuration

Alma sends a wide variety of letters to contacts such as patrons, vendors, and staff. You can fully configure the appearance of letters using letter templates. In this session, we'll learn how to: manage letters, edit the text labels of a letter, edit a letter template, and preview letters with example user data.

To configure the appearance of letters in Alma, go to Alma Configuration > General > Letters: Letters Configuration. Here you can see a list of all the types of letters sent by Alma.

You can enable and disable letters.

Alma keeps a copy of each letter sent to a user, which you can view in that user's Attachments tab. You can optionally add a retention period in days, after which Alma will purge the sent items of this letter type.

Letters can be sent via email, SMS, or webhook.

Some of these letters use Alma's default configuration, and some have been customized by your institution.

To configure the appearance and content of a letter, click on the letter name; for example, Borrowing Activity Letter.

In the configuration page for our Letter, we have three tabs, in which we can: edit the text Labels used in the letter, edit the XSL Template which determines the structure of the letter, and select to preview Letter Examples populated with data.

At any point during the configuration, we can see what the letter looks like by clicking Preview Letter. The preview shows us the structure of the email, as determined in the Template tab. Note that my preview is populated with example data. If your preview is empty, we will show you later how to pull up an example letter with data for your preview. You can preview the letter in any of the available languages for your institution, and you can send this example letter to a specified email.

The content of a letter is drawn from three sources: text labels, which make up the generic text of the letter; XSL components, which are shared graphic elements used across letters; and a letter XML generated by Alma with personalized user data.

We can edit these various elements. Suppose we want to change the word "Sincerely" here to "Cheers!". We'll close our preview, go to the Labels tab, find our "Sincerely" label, click row actions > Customize, and enter the new value. Now if we preview the letter, we can see the new value of our text label. Later in this session, we will show how to embed text labels in the letter template.

If you want to make changes to the structure of your letter, you can do so in the Template tab. Here is the XSL template for our letter. We are currently using Alma's default template.

Under Shared XSLs, we have the option to copy an XSL template created by other members in the Alma community. We're now using a shared XSL. In the same spirit, you can also contribute your own XSL template to the community. You can edit the XSL in the main panel, and if you made edits you don't want to keep, you can always Restore the template to the Alma Default.

The XSL template itself does not normally contain any text values, but rather includes values from the three sources mentioned previously.

The first source, text labels, is denoted by double ampersands, for example here is our "Sincerely" label.

The second source, XSL Components, is denoted by an include tag. For example, this line includes the header component. In the preview, we can see this header consists of our institution logo. You can edit the header and other XSL components under Alma Configuration > General > Letters: Components Configuration. We won't show this now, but you can learn about it in the documentation. Take care when editing these shared components, since editing one component can affect many letters.

The third source from which our XSL displays data is an XML with the specific user data generated for each letter. The XML contains things like the name of the patron and the titles and due dates of the loaned items. For example, these lines in our template extract data from the letter XML, according to the specified path.

To preview such letter XML examples with data, go to the Letter Examples tab. Here you can find a default letter example XML with no data. And you can add your own example letters.

The simplest way to add an example letter is to click Add from system letters, and select one of the letters previously sent by Alma. Once your letter has been added, you can Preview it. The user data has been taken from the XML.

You can select to make this letter example the Default Preview. Now this letter will show when you click Preview Letter.

If you wish, you can edit an XML to change around the example data.

Besides adding from system letters, you can also upload your own XML files.

When you're done configuring your letter, don't forget to click Save.

Back in the Letters Configuration page, we can see the Borrowing Activity Letter now appears as Customized.

Thanks for joining!