

Letter Configuration in Esploro



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 - Labels
 - Template
 - Letter examples
- Components Configuration
- WYSIWYG (What You See Is What You Get)

Introduction

This presentation is designed to accompany a one hour live interactive demonstration of the new letter configuration capabilities.

It can, however, also serve as a "standalone" document to learn about the new functionality.

.

Introduction

As of the August 2019 release of Alma a new methodology and set of options exist in Alma for letter configuration.

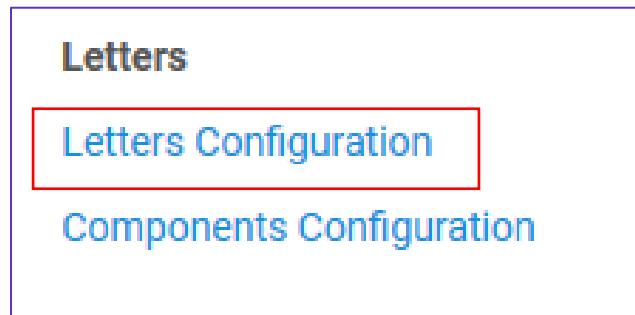
As we will see this new functionality provides a more intuitive and easy-to-use method, the most prevalent of which is the WYSIWYG (What You See is What You Get) feature when configuring the XSL templates.

A large-scale photograph of a wind farm. In the foreground, a single white wind turbine is prominently featured, its three blades extending towards the top right. Behind it, a series of other similar turbines recede into the distance, creating a sense of depth. The background consists of rolling hills or mountains under a sky filled with soft, white clouds. The overall color palette is muted, with greys, whites, and soft blues.

The “Letters Configuration” page



The "Letters Configuration" page

- All Esploro letters can be accessed for configuration via the Letters Configuration page.
- This page is accessed via **Configuration > General > Letters > Letters Configuration**.



The “Letters Configuration” page

1 - 15 of 15 Name

[Restore letters' retention table](#)  

Enabled : All Patron Facing : All Channel : All Customized : All

	Enabled	Letter	Description	Channel	Retention Period	Managed in Network	Customized	
1	<input checked="" type="checkbox"/>	Author Matching Report Letter	Author Matching Report Letter	EMAIL	<input type="text"/>	-	✓	...
2	<input checked="" type="checkbox"/>	New Research Outputs Added To Profile Letter	Research New Assets Added to Profile Notification	EMAIL	<input type="text"/>	-	✓	...
3	<input checked="" type="checkbox"/>	Reply To Researcher Letter	Reply to Researcher Letter	EMAIL	<input type="text"/>	-	✓	...
4	<input checked="" type="checkbox"/>	Research Asset Citations Send Email Letter	Research Asset Citations Send Email Letter	EMAIL	<input type="text"/>	-	✓	...
5	<input checked="" type="checkbox"/>	Research Assign To Letter	Research Assign To Letter	EMAIL	<input type="text"/>	-	✓	...
6	<input checked="" type="checkbox"/>	Research Deposit Action Letter	Research Deposit Action Letter	EMAIL	<input type="text"/>	-	✓	...
7	<input checked="" type="checkbox"/>	Researcher APC Request Send Email Letter	Researcher APC Request Send Email Letter	EMAIL	<input type="text"/>	-		...

Annotations:

- Set letter retention:** Points to the Retention Period column header.
- Enable / Disable a letter:** Points to the toggle switch in the first row.
- Access the Labels, Template and Letter Examples for the specific letter:** Points to the menu icon (three dots) in the last row.

The “Letters Configuration” page (enabling a letter)

If a letter is enabled then it will print, and if it is disabled then it will not print.

Enabled		Letter	Description
1	<input checked="" type="checkbox"/>	Author Matching Report Letter	Author Matching Report Letter
2	<input checked="" type="checkbox"/>	New Research Outputs Added To Profile Letter	Research New Assets Added to Profile Notification
3	<input type="checkbox"/>	Reply To Researcher Letter	Reply to Researcher Letter
4	<input type="checkbox"/>	Research Asset Citations Send Email Letter	Research Asset Citations Send Email Letter
5	<input checked="" type="checkbox"/>	Research Assign To Letter	Research Assign To Letter

The "Letters Configuration" page (retention period)

The retention period determines how long the letter will remain in the attachments tab of the user/researcher.

⬆ Description	Channel	Retention Period
Author Matching Report Letter	EMAIL	<input type="text"/>
Research New Assets Added to Profile Notification	EMAIL	<input type="text" value="200"/>
Reply to Researcher Letter	EMAIL	<input type="text"/>


- If there is no retention period, then the letters will remain in the attachments tab indefinitely.

The "Letters Configuration" page (retention period)

Researcher ProfileContact InformationIdentifiersAttachmentsResearcher ProxiesResearcher HistoryUser History

1 - 20 of 194File NameAdd Attachment

	File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status	
1	ResearchDepositA...	NOTIFICATION_EMAIL	4.6kb	EsploroManag...	02/28/2023 11:25:12 IST	-	-	Uploaded	...
2	ResearchDepositA...	NOTIFICATION_EMAIL	4.7kb	EsploroManag...	02/28/2023 10:53:46 IST	-	-	Uploaded	...
3	ResearchDepositA...	NOTIFICATION_EMAIL	4.7kb	EsploroManag...	02/28/2023 10:46:58 IST	-	-	Uploaded	...
4	ResearchDepositA...	NOTIFICATION_EMAIL	4.7kb	EsploroManag...	02/28/2023 10:40:02 IST	-	-	Uploaded	...
5	ResearcherAssets...	NOTIFICATION_EMAIL	5.2kb	System	02/27/2023 11:27:52 IST	-	-	Uploaded	...



Example, Researcher

Title-

Researcher typeAffiliated Researcher

Account TypeInternal

Preferred languageEnglish

Expiration date-

If these letters have a retention period, then then they will be removed from this list when older (in days) than the retention period.

The "Letters Configuration" page (retention period)

The letters are purged (removed) when the weekly scheduled **Letters purge with retention** job runs.

1 - 4 of 4

Name Letters purge with retention

Refresh


Job Category : All Status : All Submit Date Range 01/01/2023 - 31/01/2023

	Name	Process ID	Records processed	Records with exceptions	Job Category	Operator	Submit Date	Start Date	End Date	Status	
1	Letters purge with retention	2944102...	0	0	Users	System	28/01/2023 06:45:03 AM IST	28/01/2023 06:45:04 AM IST	28/01/2023 06:50:04 AM IST	Completed Successfully	...
2	Letters purge with retention	2932352...	0	0	Users	System	21/01/2023 06:45:04 AM IST	21/01/2023 06:45:04 AM IST	21/01/2023 06:50:05 AM IST	Completed Successfully	...
3	Letters purge with retention	2919715...	0	0	Users	System	14/01/2023 06:45:04 AM IST	14/01/2023 06:45:04 AM IST	14/01/2023 06:50:10 AM IST	Completed Successfully	...
4	Letters purge with retention	2910572...	0	0	Users	System	07/01/2023 06:45:10 AM IST	07/01/2023 06:45:10 AM IST	07/01/2023 06:50:10 AM IST	Completed Successfully	...

The "Letters Configuration" page (retention period)

In the report we can see how many of each letter type was deleted.

[<](#) Job Report [Back](#)

**Completed Successfully**

Letters purge with retention

[i](#) [v](#)

Process ID2235464596170001421**Started on**05/31/2019 22:45:10 CDT

Finished on05/31/2019 23:27:16 CDT**Total run time**42 Minutes 6 Seconds

StatusCompleted Successfully**Status date**05/31/2019 23:27:16 CDT

Records processed8172**Records with exceptions**0

Letter Purge Report


[v](#)

	Letter Type	Retention Period	Deleted	Failed to Delete
1	FulItemChangeDueDateLetter	180	1083	0
2	FulLostLoanLetter	180	5	0
3	FulShortLoanLetter	180	1793	0
4	FulReturnReceiptLetter	180	3138	0
5	FulLoanReceiptLetter	180	1801	0
6	FulCancelRequestLetter	180	9	0
7	FulPlaceOnHoldShelfLetter	180	111	0
8	FulUserOverdueNoticeLetter	180	232	0

[v](#)

The "Letters Configuration" page (retention period)

Here we can see letters as far back as 2012, because no retention period was defined.



Elia Zafrani

ID

EliaZ613

Account Type

Internal

Record type

Staff

User group

Yoel's Special ...

Manage fulfillment activities

General Information

Contact Information

Identifiers

Notes

Blocks

Fines/Fees

Statistics

Attachments

Proxy For

History

1 - 20 of 8,754

File Name

Q

+ Add Attachment

	File name	Type	Size	Attached By	Attached On	URL	Notes	Upload Status	
1	SystemJobLet...	NOTIFICATION_EMAIL	4.9kb	System	06/18/2012 09:42:54 AM		-	Uploaded	...
2	SystemJobLet...	NOTIFICATION_EMAIL	2.7kb	System	06/19/2012 03:18:51 PM		-	Uploaded	...

Labels, Template and Letter Example

Labels, Template and Letter Example

When a staff user selects **Edit** from the "Letters Configuration" page they will reach the ...

	Enabled	Letter	Description	Channel	Retention Period	Managed in Network	Customized	
1	<input checked="" type="checkbox"/>	Author Matching Report Letter	Author Matching Report Letter	EMAIL	<input type="text"/>	-	✓	...
2	<input checked="" type="checkbox"/>	New Research Outputs Added To Profile Letter	Research New Assets Added to Profile Notification	EMAIL	<input type="text"/>	-		...
3	<input checked="" type="checkbox"/>	Reply To Researcher Letter	Reply to Researcher Letter	EMAIL	<input type="text"/>	-		...
4	<input checked="" type="checkbox"/>	Research Asset Citations Send Email Letter	Research Asset Citations Send Email Letter	EMAIL	<input type="text"/>	-	✓	...
5	<input checked="" type="checkbox"/>	Research Assign To Letter	Research Assign To Letter	EMAIL	<input type="text"/>	-	✓	...

Edit

Restore Activation

View hidden

Labels, Template and Letter Example

...page of labels, templates and examples for the specific letter.

<

New Research Outputs Added To Profile Letter

Preview Letter

Cancel

Save

Labels

Template

Letter Examples

Customize All

Restore All

Restore Default Translations

Filter : English

	Enabled	Code	Description	Translation	Managed in Network	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	access_profile_for_more_medi	.	.		-	-	...
2	<input checked="" type="checkbox"/>	access_profile_for_more_suffi	.	.		-	-	...
3	<input checked="" type="checkbox"/>	inform_mediated_deposits_sul	. If these are not your research	. If these are not your research outputs or you see any issues please contact		-	-	...

Labels

Labels

- The labels on this page ...

[New Research Outputs Added To Profile Letter](#)

Labels

Template

Letter Examples

[Customize All](#)

Filter : English

	Enabled	Code	Description	Translation
1	<input checked="" type="checkbox"/>	access_profile_for_more_medi	.	.
2	<input checked="" type="checkbox"/>	access_profile_for_more_suffi	.	.
3	<input checked="" type="checkbox"/>	inform_mediated_deposits_suf	. If these are not your research	. If these are not your research outputs or you see any issues please contact
4	<input checked="" type="checkbox"/>	inform_self_deposits_suffix	:	:
5	<input checked="" type="checkbox"/>	dear	Dear	Dear

Labels

...correspond to all places in the XSL template where there are two @@ characters that open and close a textual value.

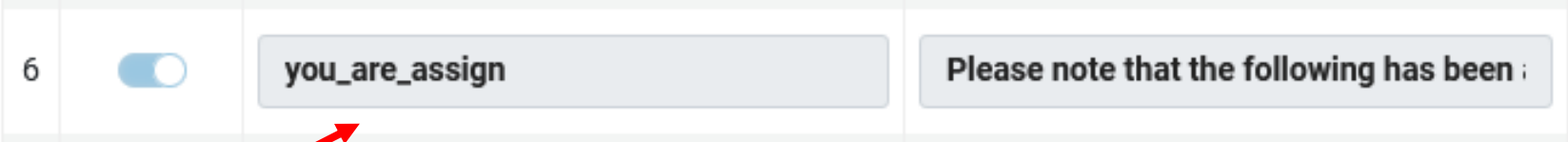
```
<xsl:call-template name="head" /> <!-- header.xsl -->
<xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xsl -->

<br />

<table cellpadding="5" cellspacing="0" border="0">
  <tr>
    <td>
      @@you_are_assign@@ <xsl:value-of select="/notification_data/assigned_object"/>&#160;<xsl:value-of select="/notification_data/assigned_object_name"/><br />
    </td>
  </tr>
</table>
<xsl:if test="notification_data/note">
```

Labels

For example, where it states **@@you_are_assign@@** in the XSL it states “Please note that the following...” in the label.



In the labels

```
<table cellpadding="5" cellspacing="0" border="0">
  <tr>
    <td>
      @@you_are_assign@@ <xsl:value-of select="/notification_data/assigned_object"/>&
    </td>
  </tr>
</table>
```

In the XSL

Labels

- Here it is in the letter to the user.

Assign To

25020928736 DepositsAssignApproveSelected

Address 111

Work City

Please note that the following has been assigned to you: Demographic cost and mechanisms of adaptation to environmental stress in resurrected Daphnia25020928736 (991002841330806991)

Note: DepositsAssignApproveSelected

Sincerely

Mr./Mrs. Exploro Manager

Labels

- Using the labels to change text of a letter is an easy way to edit letters without needing to edit the actual XSL in the template.
- Instead of editing XSL, a user can just change the text in the label.
- For example, if you want the letter to state, "*Please note there is a new asset assigned to you:*" instead of just "*Please note that the following has been assigned to you:*" then you can change it here in the label:

4	<input type="checkbox"/>	note	Note
5	<input checked="" type="checkbox"/>	you_are_assign	ere is a new asset assigned to you:
6	<input type="checkbox"/>	sincerely	Sincerely

Labels

- Now the text of the letter has changed.

Assign To

Esploro Manager

Please note there is a new asset assigned to you: Actores de 'This Is Us' y 'Hamilton' encabezan el Desfile de Acción de Gracias en Chicago (991002842258206991)

Note:

Sincerely

Mr./Mrs. Staff Ex Libris



04 Template

Template

From the template tab it is possible to view and edit the template (XSL style sheet) of the specific letter.

[Research Assign To Letter](#)

[Labels](#) [Template](#) [Letter Examples](#)

[Restore](#) [Contribute](#) [Shared XSLs](#)

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="esploroHeader.xml" />
  <xsl:include href="esploroSenderReceiver.xml" />
  <xsl:include href="esploroFooter.xml" />
  <xsl:include href="esploroStyle.xml" />
  <xsl:template match="/">
    <html>
      <head>
        <xsl:call-template name="generalStyle" />
      </head>

      <body>
        <xsl:attribute name="style">
          <xsl:call-template name="bodyStyleCss" /> <!-- style.xml -->
        </xsl:attribute>

        <xsl:call-template name="head" /> <!-- header.xml -->
        <xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xml -->
      </body>
    </html>
  </xsl:template>
</xsl:stylesheet>
```

Template

- For example, perhaps we want to change the format and or text of this letter where it states “Please note that the following has been assigned to you”.

Assign To

25020928736 DepositsAssignApproveSelected

Address 111

Work City

Please note that the following has been assigned to you: Demographic cost and mechanisms of adaptation to environmental stress in resurrected Daphnia25020928736 (991002841330806991)

Note: DepositsAssignApproveSelected

Sincerely

Mr./Mrs. Exploro Manager

Template

If that is the case, then we can change this part of the XSL:

XSL:

```
<xsl:attribute name="style">
  <xsl:call-template name="bodyStyleCss" /> <!-- style.xml -->
</xsl:attribute>

<xsl:call-template name="head" /> <!-- header.xml -->
<xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xml -->

<br />

<table cellspacing="0" cellpadding="5" border="0">
  <tr>
    <td>
      @@you_are_assign@@ <xsl:value-of select="/notification_data/assigned_object"/>&#160;<xsl:value-of select="/notification_data/assigned_object_name"/><br />
    </td>
  </tr>
</table>
<xsl:if test="notification_data/note">
```

Template

Instead of this...

```
<tr>
  <td>
    @@you_are_assign@@
    <xsl:value-of
      select="/notification_data/assigned_object"/>&#160;<xsl:value-of
      select="/notification_data/assigned_object_name"/><br />
    </td>
  </tr>
```

Template

...we can put this:

```
<tr>
  <td>
    <font color = "red"><u> <b>Please note the following was assigned
to you: </b> </u> </font>
    <xsl:value-of select="/notification_data/assigned_object"/>&#160;
<xsl:value-of
  select="/notification_data/assigned_object_name"/> <br />
  </td>
</tr>
```

Template

Here is it in the XSL...

[Research Assign To Letter](#)

Preview

Labels

Template

Letter Examples

Restore

Contribute

Shared XSLs

XSL:

```
<xsl:attribute name="style">
  <xsl:call-template name="bodyStyleCss" /> <!-- style.xml -->
</xsl:attribute>

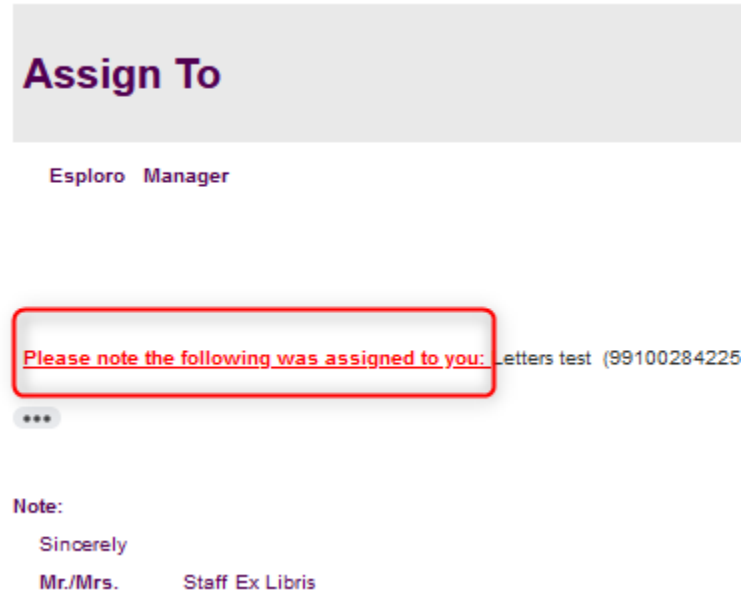
  <xsl:call-template name="head" /> <!-- header.xml -->
  <xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xml -->

  <br />

  <table cellspacing="0" cellpadding="5" border="0">
    <tr>
      <td>
        <font color = "red"><u> <b>Please note the following was assigned to you: </b> </u> </font>
        <xsl:value-of select="/notification_data/assigned_object"/>&#160;<xsl:value-of select="/notification_data/assigned_object_name"/> <br />
      </td>
    </tr>
  </table>
  <xsl:if test="notification_data/note">
```

Template

...and here it is in the letter:



Note: Later we will see how the **Preview Letter** option can be used to test the edited changes of the XSL without really sending the letter.

Letter examples

We will return to the **Letter Examples** tab later.
It will be more relevant after we review the "WYSIWYG" section.

<

Research Assign To Letter

Preview Letter

Cancel

Save

Labels

Template

Letter Examples

+ Add from system letters

Upload letter example (XML) ▾

📄

⚙️

Letter Example	Last Updated	Default Preview	
1 DefaultLetter.xml	03/02/2023	<div></div>	<div>...</div>

Components Configuration

Section divider styles

- A section break slide can be used to define a new chapter, as listed in the agenda.



Components Configuration

Many letters in Esploro consist of "calls" to other letters.
For example, here is the beginning of the **Research Assign to** letter.


```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:include href="esploroHeader.xsl" />
  <xsl:include href="esploroSenderReceiver.xsl" />
  <xsl:include href="esploroFooter.xsl" />
  <xsl:include href="esploroStyle.xsl" />
<xsl:template match="/">
  <html>
    <head>
```

Components Configuration

- These calls to common letters save the need to do repeated "coding" in each letter.
- For example (almost) all letters start with the following (example on next slide)
 - An icon
 - Name of letter
 - Date
- By having the reference to these "common values" all in one referenced letter, the design and configuration of the letter mechanism is efficient and easy to maintain.

Components Configuration

This is an example whereby (almost) all letters start with an icon, name of letter and date:



Assign To

02/03/2023

implementer Esploro

Components Configuration

- The reference to the logo, letter name and date is all in the one header.
- It does not need to be in each separate xsl template. Only a call to the header is needed.
- This is `exploroHeader.xsl`

```
<!-- LOGO INSERT -->
<tr>
  <xsl:attribute name="style">
    <xsl:call-template name="headerLogoStyleCss" /> <!-- style.xsl -->
  </xsl:attribute>
  <td colspan="2">
    <div id="mailHeader">
      <div id="logoContainer" class="alignLeft">
        
      </div>
    </div>
  </td>
</tr>
<!-- END OF LOGO INSERT -->
<tr>
  <xsl:for-each select="notification_data/general_data">
    <td>
      <h1><xsl:value-of select="letter_name"/></h1>
    </td>
    <td align="right">
      <xsl:value-of select="current_date"/>
    </td>
  </xsl:for-each>
</tr>
```

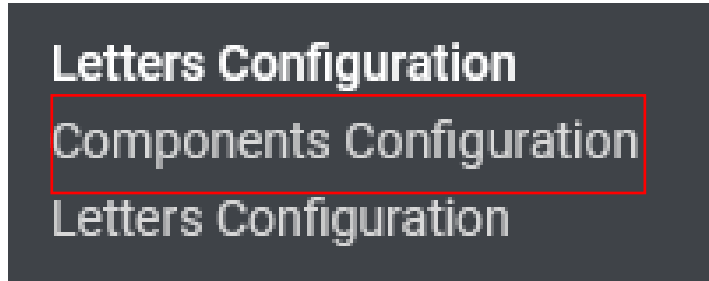
Logo

Letter name

Date

Component Configuration

- The common XSL files are accessed via the "Components Configuration".



Components Configuration

- For example, here the header can be changed, and it will immediately affect all letters that use the header.

	▲ Filename	Description	Customized	Updated By	Last Updated	
1	checksum_calc.xsl	Check sum Barcod xsl		-	-	...
2	esploroFooter.xsl	Footer Letter XSL for Esploro	✓	00095153	10/09/2021	...
3	esploroHeader.xsl	Header Letter XSL for Esploro		-	-	...
4	esploroSenderReceiver.xsl	SenderReciver Letter XSL for Esploro	✓	00095153	09/09/2021	...

Components Configuration

- Now we can change for example this...

```
<!-- LOGO INSERT -->
    <tr>
      <xsl:attribute name="style">
        <xsl:call-template name="headerLogoStyleCss" /> <!-- esploroStyle.xsl -->
      </xsl:attribute>
      <td colspan="2">
        <div id="mailHeader">
          <div id="logoContainer" >
            
          </div>
        </div>
      </td>
    </tr>
  <!-- END OF LOGO INSERT -->
```


Components Configuration

- ...to this:

```
<!-- LOGO INSERT -->
    <tr>
        <xsl:attribute name="style">
            <xsl:call-template name="headerLogoStyleCss" /> <!-- esploroStyle.xsl -->
        </xsl:attribute>
        <td colspan="2">
            <div id="mailHeader">
<div id="logoContainer" >
    
</div>
            </div>
        </td>
    </tr>
<!-- END OF LOGO INSERT -->
```

Components Configuration

- Also, now instead of this...

	
Letter Name	18/11/2019
Smith, John	
22 Main St.	
LA	

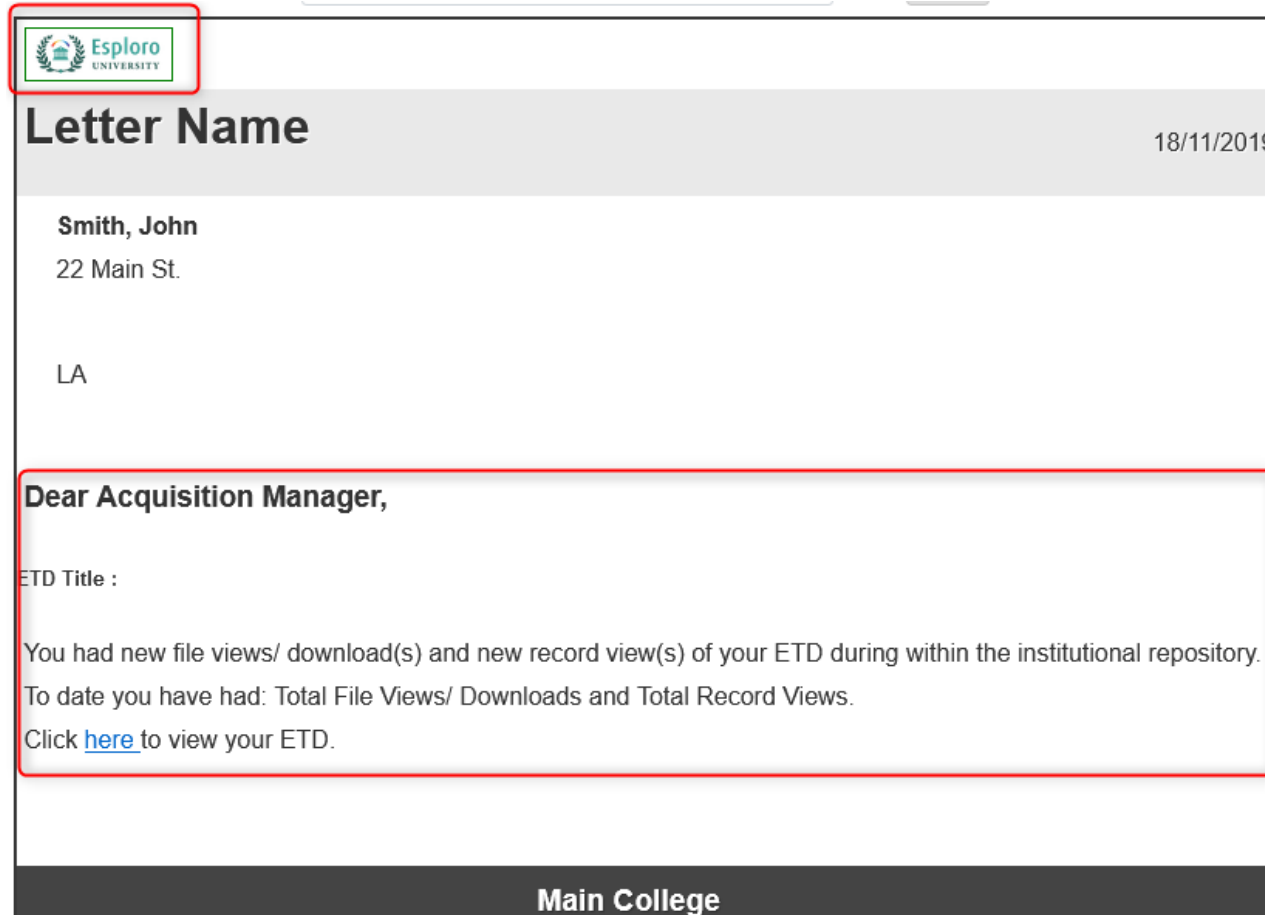
Components Configuration


- ...we have this – a green border around the logo.

	
Letter Name	18/11/2019
Smith, John	
22 Main St.	
LA	

Components Configuration

- The change is also in effect for all other letters that "call" esploroHeader.xsl



 Esploro UNIVERSITY

Letter Name 18/11/2019

Smith, John
22 Main St.

LA

Dear Acquisition Manager,

ETD Title :

You had new file views/ download(s) and new record view(s) of your ETD during within the institutional repository.
To date you have had: Total File Views/ Downloads and Total Record Views.
Click [here](#) to view your ETD.

Main College

WYSIWYG

WYSIWYG

Letters Configuration

Components Configuration

Letters Configuration

WYSIWYG

It is possible to test the configuration changes to XSL:

1. Without even saving the XSL (just editing edit)
2. Based on real actual raw XML of letters which have been sent in the past

In other words: What you see is what you get.

What you have configured in the XSL is what you see on the screen when clicking **Preview**. No need to send a letter and no need to save the XSL – just start configuring and click **Preview**. When the configuration is as desired select "Save".

Let's see now how it works.

WYSIWYG

Assign a deposit to someone else in the system.

Assign to

Assign to

implementer, Esploro

Note

Send E-mail

☒

Cancel

Assign

WYSIWYG

- Now we will go to **Configuration > General > Letters > Letters Configuration**.
- We will then select **Edit** on the Actions menu for the “Researcher Assign To Letter”, and switch to the **Letter Examples** tab.

WYSIWYG

We see the default letter and choose "Add from system letters".

Research Assign To Letter

Preview Letter

Cancel

Save

Labels

Template

Letter Examples

+ Add from system letters

Upload letter example (XML) ▾

Letter Example	Last Updated	Default Preview
1 DefaultLetter.xml	02/03/2023	<div></div>

This is the default letter xml and can be used instead of adding the xml of a letter which was actually sent.

WYSIWYG

Now we see the letters we have already sent, and can choose for which ones we want to view the raw XML. These were **automatically** added to the system.

Sent Letters

	Name	Date
1	ResearchAssignToLetter - 02/03/2023 12:22:43 PM IST	02/03/2023 12:22:43 PM IST
2	ResearchAssignToLetter - 02/03/2023 12:20:19 PM IST	02/03/2023 12:20:19 PM IST
3	ResearchAssignToLetter - 02/03/2023 12:17:20 PM IST	02/03/2023 12:17:20 PM IST

WYSIWYG

For each of the raw XML versions chosen we can edit, preview or delete.

Research Assign To Letter

Preview Letter

Cancel

Save

Labels

Template

Letter Examples

+ Add from system letters

Upload letter example (XML) ▾

Letter Example	Last Updated	Default Preview	
1 DefaultLetter.xml	15/02/2023	<input type="radio"/>	<div></div>
2 ResearchAssignToLetter - 06/18/2021 11:36:47 AM CDT	15/02/2023	<input checked="" type="radio"/>	<div><div>Edit</div><div>Preview</div><div>Delete</div></div>

WYSIWYG

When choosing edit we can view, edit and download the XML

Edit XML

```
<notification_data>
<general_data><address_c>None;None</address_c>
<address_c>None;None</address_c>
<address_from>CIRC@utdallas.edu</address_from>
<current_date>07/28/2019</current_date>
<letter_channel_info></letter_channel_info>
<letter_name>Borrowing Activity Letter</letter_name>
<letter_type>FullUserBorrowingActivityLetter</letter_type>
<subject>Patron Circulation Summary</subject>
</general_data>
<item_loans><item_loan><accession_number></accession_number>
<alternative_call_number></alternative_call_number>
<author>Fallaize, Elizabeth.</author>
<barcode>31863002368185</barcode>
<booking_request_id></booking_request_id>
<calculated_due_date></calculated_due_date>
<call_number>PQ673 .F35 1993</call_number>
<create_date>07/28/2019</create_date>
<delivery_address></delivery_address>
<description>c. 1</description>
<description_for_display>Description: c. 1. Call Number: PQ673 .F35 1993 </description_for_display>
<due_date>08/18/2019</due_date>
<due_date_shortened_reason></due_date_shortened_reason>
<due_date_start_calculation_date></due_date_start_calculation_date>
<entity_action></entity_action>
<external_item_id></external_item_id>
<fine></fine>
<fine_action></fine_action>
<from_another_inst></from_another_inst>
<from_another_inst_circ_desk></from_another_inst_circ_desk>
<from_another_inst_library></from_another_inst_library>
```

Download XML

Close Save

WYSIWYG

We can also determine in the **Letter Examples** tab, which XML example will be used as the default when we use the WYSIWYG option in the **Template** tab.

Research Assign To Letter

Preview Letter

Cancel

Save

Labels

Template

Letter Examples

+ Add from system letters


Upload letter example (XML)

Letter Example	Last Updated	Default Preview	
1 DefaultLetter.xml	15/02/2023	<input type="radio"/>	<div></div>
2 ResearchAssignToLetter - 06/18/2021 11:36:47 AM CDT	15/02/2023	<input checked="" type="radio"/>	<div></div>

WYSIWYG

We will now edit the XSL and utilize the WYSIWYG feature.

For example, we see that the phone number of the user is not included with the address in the default letter. We can check the XML to see if it is possible to add it.



Letter Name

18/11/2019

Smith, John

22 Main St.

LA

Please note that the following has been assigned to you: Purchase Order Line 15-311143

WYSIWYG

The phone number of the user is in the XML. That means it can be added to the letter.

```
<user for printing>
  <address1>22 Main St.</address1>
  <address2></address2>
  <address3></address3>
  <address4></address4>
  <address5></address5>
  <city>LA</city>
  <country></country>
  <email>john.smith@example.com</email>
  <first_name>John</first_name>
  <identifiers>
    <code_value>
      <code>Primary Identifier</code>
      <value>ATU_1574162479646</value>
    </code_value>
  </identifiers>
  <last_name>Smith</last_name>
  <middle_name></middle_name>
  <name>Smith, John</name>
  <phone>0544444444</phone>
```


WYSIWYG

In order to add it to the XSL we need the name and path of the field

There are many ways to get the path. Here we are using a Notepad ++ plugin after downloading the XML.

```
<user_for_printing>
  <address1>22 Main St.</address1>
  <address2></address2>
  <address3></address3>
  <address4></address4>
  <address5></address5>
  <city>LA</city>
  <country></country>
  <email>john.smith@example.com</email>
  <first_name>John</first_name>
  <identifiers>
    <code_value>
      <code>Primary Identifier</code>
      <value>ATU_1574162479646</value>
    </code_value>
  </identifiers>
  <last_name>Smith</last_name>
  <middle_name></middle_name>
  <name>Smith, John</name>
  <phone>0544444444</phone>
  <postal_code></postal_code>
  <preferred_first_name></preferred_first_name>
  <preferred_last_name></preferred_last_name>
  <preferred_middle_name></preferred_middle_name>
  <state></state>
  <title>GeneralAdministrator</title>
  <user_group>STAFF</user_group>
  <user_title></user_title>
</user_for_printing>
```

WYSIWYG

This is the path we need to add to the XSL.

```
/notification_data/user_for_printing/country /phone
```

WYSIWYG

We can now add the phone to the XSL by adding the following:

We will demonstrate this on a specific letter, but it can be added to the esploroSenderReceiver.xsl and will be changed to all associated letters.

```
<tr>
  <td>
    <xsl:value-of
      select="notification_data/user_for_printing/phone" />
    </td>
  </tr>
```

WYSIWYG

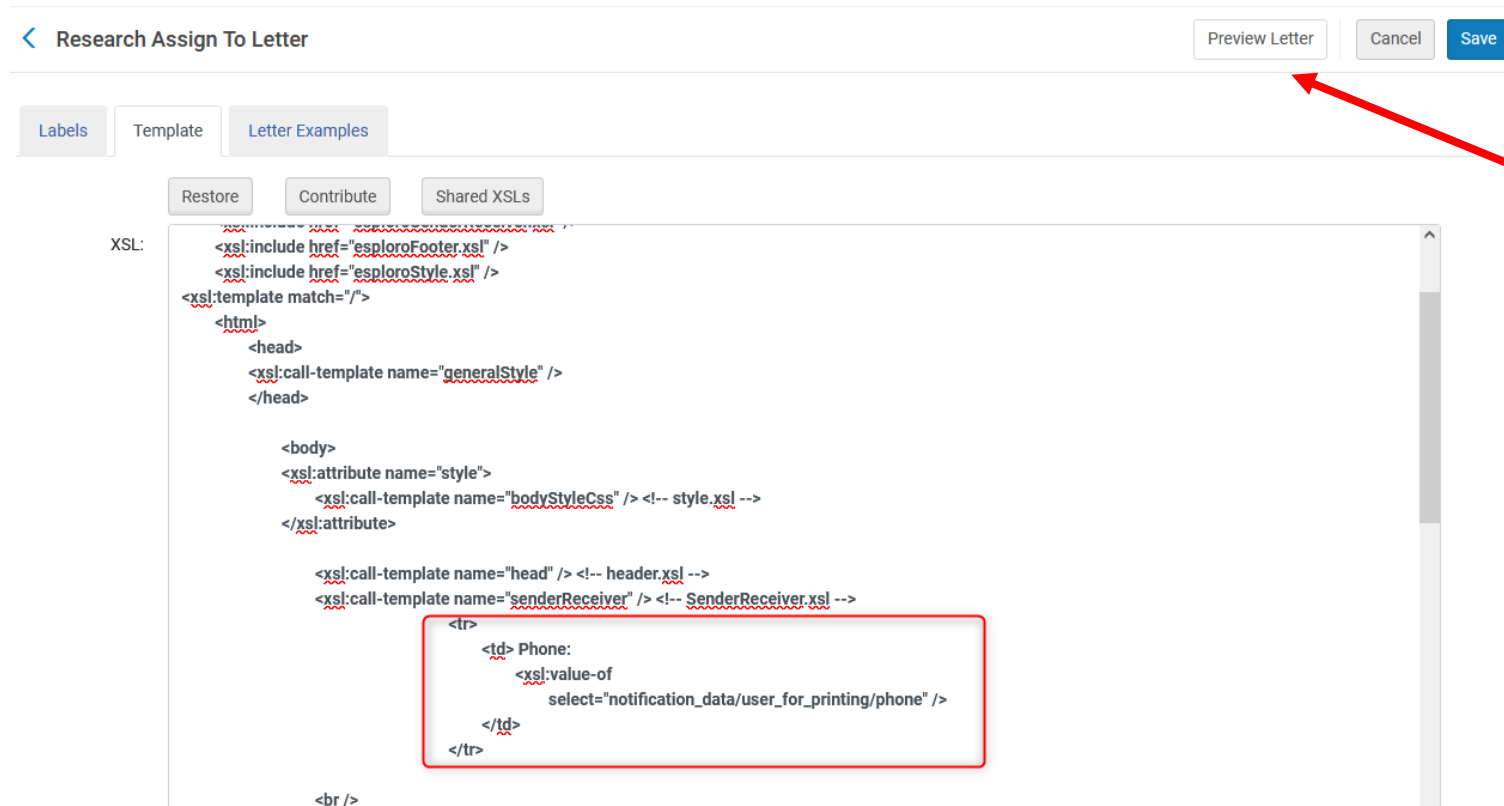
In here:

```
<xsl:call-template name="head" /> <!-- esploroHeader.xsl -->
      <xsl:call-template
name="esplroSenderReceiver" /> <!-- SenderReceiver.xsl -->
<tr>
  <td> Phone:
    <xsl:value-of
      select="notification_data/user_for_printing/phone" />
  </td>
</tr>
```

This is the path of the value (phone number) we found in the XML.

WYSIWYG


Now we have added this phone number to the XSL and can preview how it will appear, without actually sending it to a recipient and without even saving the XSL.



Clicking "Preview" we will experience WYSIWYG: However the XSL has been edited is how the letter will appear.

WYSIWYG

What we see here is what we get from the current XSL configuration: WYSIWYG



Esploro UNIVERSITY

Letter Name 18/11/2019

Smith, John
22 Main St.

LA

Phone: 0544444444

Please note that the following has been assigned to you: Purchase Order Line 15 311143

- If we like the results, we can save the XSL and move on.
- If we do not like the results, we can keep editing the XSL and test some more.

WYSIWYG

In summary:

- When we sent the **Researcher Assign To Letter** to the user, the XML versions of the letters were automatically added to the system, and we could define which one would be used as the default preview when testing the XSL. This was done in the **Letter Examples** tab.
- In the **Template** tab we could edit the XSL and keep doing **Preview** until it was just as we wanted. When it was fully configured to our satisfaction we could save it, knowing it will from now on be sent according to how it appeared in the preview.



Thank you

Ayelet Gelber

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