<https://backoffice-qac-iowa-inst.esploro.exlibrisgroup.com/>

Link to Yoel’s powerpoint?

https://knowledge.exlibrisgroup.com/Esploro/Product\_Documentation/Esploro\_Online\_Help\_(English)/Ongoing\_Maintenance\_and\_Administration/Configuring\_Esploro\_Letters

Esploro How To Configure Letters

Esploro sends email messages to researchers, students, and administrators as part of some workflows, such as to notify a student when their deposit was approved. In this video, we will demonstrate how to customize these letters.

To configure letters, you need the Letter Administrator role.

In the Hub, open Configuration > General > Letters Configuration.

Here you can see a list of all the types of letters sent by Esploro.

You can enable and disable letters with this toggle switch. Disabled letters will not be sent.

Esploro 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 Esploro will purge the sent items of this letter type.

Each of these letters has a default configuration. To customize a letter, click row action > Edit.

This screen displays three panels. On the right is a preview of the letter. The structure is generated from the XSL file, shown in the upper-left panel. The XSL is the template that pulls together different elements to create the letter. The sample data is taken from the XML file, shown in the lower-left panel. The XML contains things like the name of the researcher and the asset ID, which will of course be different for every letter.

For example, this message ends with the email address of the contact person in case there are questions. In the XSL this appears as “notification\_data/assignee\_preferred\_email,” which calls that data from the XML where the “assignee\_preferred\_email” is defined. This is the email that we see in the preview.

As you edit the XSL or XML, the changes are immediately reflected in the Preview.

Let’s make a change to the XSL. We’ll make the email address bold. Add a “strong” tag before and after the part that calls the email. Here we can see in the Preview that the email address is now bold.

If we make a mistake in the code, such as forgetting to close the tag, we will get an error message with the line number, so it is clear what we need to fix.

Similarly, we can make changes in the XML and see how different data looks in the letter.

If you want to switch to a different XML file, click Letter Examples. Here we can see a default XML that came out-of-the-box. We can take example data from actual letters that have been previously sent. We can also upload an XML file from another source. We recommend downloading the XML files that are available in Esploro Online Help, and using those for your example data. Select the XML file that you would like to use for your Preview, and click Save.

The XSL template calls elements from two other sources: Labels and Components.

Labels are identified by double “at” signs before and after them. For example, here is a label called “Sincerely.” If we click Labels, we open a pane where we can change the labels. Now, the Sincerely label is defined as “From” but we can change it to “Cheers!” Click Save, and we can see that the Preview has been changed.

Components are XSL files that are used in multiple letters, such as a header or footer. These are denoted by an include tag. For example, this line includes the header component. These can be changed in the General Configuration menu > Letters Configuration > Components Configuration. Changes to components will be applied to all letters that use those components.

If you are satisfied with your letter, click Save, and this template will be applied to all future letters of this type. If you would like to save your work without applying the changes, you can do that as well. Click Save Draft. This watermark appears on the preview to indicate that this is a draft. You can then leave the page without saving. When you later return to the Letters Configuration page you can see that this letter has an XSL Draft. The row actions now include Edit Draft and Remove Draft. Alternatively, you can send this example to an email of your choice. They will receive this version of the letter, as it appears in this preview, even if you haven’t saved it as a draft. They will also receive the XSL file as an attachment.

Now you know how to configure letters in Esploro, so you can customize the emails sent to Researchers, students, and administrators.