Configuring Alma Letters

Note
If you want to configure display labels for Primo VE, see Configuring Display Labels.

To configure letters, you must have one of the following roles:

- General System Administrator
- Letter Administrator

Alma provides a letter system to send highly customizable messages to patrons, librarians, and vendors. Messages include warnings, confirmations, notifications, summary information, orders, fulfillment requests, and so forth. Messages can be sent by email, SMS, ISO protocol, or other means, or they can be printed out via printer or an external system to be sent by mail. Every letter that can be sent to a printer/email can be printed out using Quick Printing.

Alma includes a list of letter types, where a single letter type can be used to send multiple letters that use the same structure. Alma constructs a letter by combining dynamic XML fields generated by Alma (data), labels (static text), and a template (formatting). The static labels and template (XSL style sheets) are included with Alma but may be configured by the user. For institutions whose users prefer languages other than English, label sets are provided in multiple languages.

Most letters are sent automatically by Alma at the appropriate stage in a workflow. For example, Alma sends a letter to a patron after an item borrowed by the patron is marked as overdue. Some letters can be sent by a user at any time, such as a query to a vendor or a patron.

- Watch the Configuring Letters in Alma video (5:38 minutes).
- For specific examples on customizing letters, see here.
- For an in-depth PowerPoint presentation providing a step by description of how letters are customized, see Letter Configuration in Alma.

Note
Alma does not use the letter subsystem for certain types of protocol-specific communication with supporting entities, such as ERPs or other ILSs. For example, Alma can use electronic data interchange (EDI) in place of email to communicate with supporting vendors.

All Alma letters appear on the Letters Configuration page (Configuration Menu > General > Letters > Letters Configuration). Available actions include enabling/disabling letters, setting retention periods, and editing letters to configure templates and labels (static content), and view/save letter examples. The Description text is hard-coded and cannot be configured. For more information about mapping tables, see Mapping Tables.
To configure and customize Alma letters:

1. Add the Letter Administrator role to users who will customize or maintain the email letters. For more information on assigning roles, see Adding Roles to Users.
2. If you are working in a sandbox environment or a pre-“Go Live” production environment, add the letter administrators’ email addresses to the allowed email list (see Configuring Allowed Emails).
3. Confirm that the appropriate letters are enabled (see Enabling/Disabling Letters).
4. Determine which XML data fields are used for a specific type of letter (see Testing Letter Output and Viewing the Source XML).
5. Customize the text elements (labels) of the letter (see Configuring Letter Labels).
6. Customize the look-and-feel (XSL) and content of the letter (see Customizing Letter Templates).
7. Test the output of the XML file and confirm that the letter appears correctly (see Testing Letter Output and Viewing the Source XML).

You can centrally manage letters in a Network Zone; see Centrally Managing Letters in a Network Zone.

To restore activation:

- Select "Restore Activation" in the row actions to restore the "Enabled" button to its Out of The Box state. If the button is already in its OTB state, this button does nothing.

Enabling/Disabling Letters

Alma does not send disabled letters. Attempting to send a disabled letter may result in an error notification when the letter is triggered.

Some letters can be activated for different types of notifications, for example SMS and email; the notification type of a letter is listed in the Channel column. If the email version of a letter type is disabled, for example, then email communication is disabled for the relevant scenario, even if email is enabled for this scenario.

Note

Some notifications may be disabled for specific users or for bulk sets of users. For more information, please see
Setting Letter Retention

To indicate that the configured letters are deleted after a certain number of days, add a retention period, in number of days, in the **Retention Period** field of email letters. If no retention period was defined, then letters sent by Alma are retained indefinitely and available on the **Attachments** tab of the User Details (see [Managing User Attachments](#)).

A weekly job, **Letters Purge with Retention**, deletes all enabled letters, if they were created more than the configured number of days ago.

Configuring Letter Labels

You can configure the labels associated with letters. Using the labels to change text of a letter is an easy way to edit letters without needing to edit the actual XSL template of a letter. For example, if you want the letter to state "Item Description" instead of just "Description", then you can change it in the labels:

Note also that you can edit the template (XSL style sheet) that is used to format the letter and determine which fields and text appear in the letter. Configure the template to customize what and how labels and data appear in the letters. For details, see [Customizing Letter Templates](#).

Two kinds of data are substituted into, and configured by, the letter XSL before the letter is sent (to the patron, or the printer, or wherever): labels and XML data. Alma generates dynamic XML data. Labels are strings of text that you create and translate. Some letters can include the string %reqId% in the description column of the Subject label. This will be replaced with the request’s ID when the letter is generated. The letters that include this option are:

- Borrower Overdue Email Letter
- Externally Obtained Letter
- Ful Cancel Email Letter
- Ful Outgoing Email Letter
- Ful Renew Email Letter
- Lending Recall Email Letter
- Query To Patron Letter

[Configuring Library Notices Opt-In](#)
To configure letter labels:

Edit each row as required:

1. Select **Edit** on the row action list of the letter. The **Labels** tab is displayed by default.

2. The following options are available on the row actions menu:
   - **Edit** - Opens the label line to edit the **Enabled** switch and the **Description** field.
   - **Language change** - If another language is configured, the **Translation** field opens for editing.
   - **Restore** - If the line was modified, the **Enabled** and **Description** fields are restored to their default.
   - **Restore Translation** - If another language is configured and the **Translation** label was modified, the field is restored to the default.

3. Select **Customize** in the row actions list to change the label or its translation. Select **Customize All** to edit all rows.
   - To edit translations, first select a language in the filter.
   - Select **Restore** in the row actions list to restore the label to its default text.
   - Select **Restore Translation** in the row actions list to restore the translation to its default text. Select **Restore Default Translations** to restore all translations.

4. When done, select **Save**.

5. To disable a label, see the knowledge base article [How can I disable a line in an Alma email letter?](#).

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**Note**

- The **addressFrom** label is the **From:** field in the email's header, which is separate from the SMTP envelope **EnvelopeFrom** address. Replies to emails go to the email header **From:** field. The **EnvelopeFrom** address is configured separately; see [Configuring Outgoing Email](#). You can also specify an alias for the **addressFrom** parameter in the following format `alias <actual_email_ID@university.edu>`.
- You can customize the email addresses (or URL) to which the Contact Us and My Account links are directed by configuring the **email_my_account** and **email_contact_us** parameters; see [Configuring Other Settings](#).
- Using HTML tags in the label "Description" field is not supported.

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**Customizing Letter Templates**

**Note**

If you have reached this section of the online help while attempting to configure a copyright declaration, see [Configuring Copyright Declarations](#). For information on configuring a resource sharing copyright declaration, see [Configuring a Resource Sharing Copyright Declaration](#).
You can also edit the template (XSL style sheet) that determines which fields and text appear in the letter and is used to format the letter. Configure the template to customize which labels and how labels and data appear in the letter. In addition, you can use XSL conditional statements to make decisions about what appears in a letter, and even whether the letter is sent. For an example, see How to use the if condition to configure a letter to not be sent under certain circumstances.docx.

Ex Libris Support is available to assist with issues related to customized XSL stylesheets. However, their troubleshooting effort is within practical limits. If a style sheet is heavily customized, it may require time-consuming analysis to identify a specific error. Such validation cannot be provided by Support for all customized style sheets. The best practice in these situations is for you to eliminate one condition/test/section at a time to determine what causes the problem.

To customize a letter’s template (XSL style sheets):

1. To open the template, find the desired letter on the Letters Configuration page, select Edit on the row action list of the letter, then select the Template tab.
   The XSL and header information appear in a configuration pane.

2. Customize the XSL of the letter as required. The available fields on this page are in the labels associated with the letter and the XML fields that are generated by Alma.

The following examples show what you can do with XSL to customize the output of your letters:

- Use the substring and string-length functions to output the last four digits of a code:

  ```xml
  <b>@@requested_for@@ :*****
  <xsl:value-of select="substring(notification_data/user_for_printing/
  identifiers/code_value/value,string-length(notification_data/user_for_printing/
  identifiers/code_value/value) - 3)"/></b>
  ```

- Add notes from the vendor (from the PO line) and the rush indicator to the Order List Mail letter:

  ```xml
  <tr>
  <td><b>Notes To Vendor: </b><xsl:value-of select="/notification_data/po/
  po_line_list/po_line/vendor_note"/>&#160;</td>
  </tr>
  <tr>
  <td><b>Is Rush? </b><xsl:value-of select="/notification_data/po/po_line_list/
  po_line/rush"/>&#160;</td>
  </tr>
  ```

- Ensure that the Notes that may affect loan line appears in the On Hold Shelf letter only if there is a block on the patron:
If the following snippet follows the address line in the SenderReceiver.xsl file, you can ensure that the user's phone number is included in all the letters that use this template.

Have the name of the template appear as hidden text in the output by adding the following after the <html> tag:

The output will include something like:

To remove an element from a letter, find the element to be removed. Add comment indicators on either side of the line, such as, <!--@description@-->

The output table displays without the description column.

Suppress a letter being sent to users in a specific user group. Add a terminate clause condition in these two places.

- After the initial include lines at the top of the letter, as follows:

- And below this line:
In the above example, the letter is not generated for users in the Graduate Student user group. For a more detailed explanation, see How to use the if condition to configure a letter to not be sent under certain circumstances.docx.

- Select Yes to save your customizations.
- You can select Preview Letter to view the letter setup with generic data.

**Note**

If you use a tag to refer to an outside location such as a template or URL (for example, `<xsl:include href="http://{$PathToWeb}/html/xsl/head.xsl"/>`) and the outside source changes, refresh the XSL (by resaving it) for the new information to be included in the letter.

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**Working with Names in System Notifications and Letters**

Some system notifications and letters that incorporate name information can be updated to use a user's preferred name. For system notifications and letters that incorporate name information such as the Mail Reason Letter XSL, the preferred names can be specified using preferred_first_name, preferred_middle_name, and preferred_last_name. See the following example:

```
<xsl:value-of select="receivers/receiver/user/preferred_last_name"/>
```

For more information on preferred names, see Managing Users.

For more information on the mailReason.xsl letter, see Configuring Components.

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**Example Letter Customization: Query to Patron Letter**

You can configure types of letters to be sent to patrons using the enhanced XSL Query to Patron letter. You can define up to 30 types of letters, for example a welcome letter, a response to a request, and so forth (see Configuring Patron Query Types).

After configuring the query types, a user with the Letter Administrator role can modify the labels and the style sheet of the Query to Patron letter.

**To modify the Query to Patron letter:**

1. Confirm that the Query to Patron letter is enabled (see Enabling/Disabling Letters).
2. Download a copy of the Query to Patron XML fields:
   1. Configure Alma to send you a copy of the XML fields when a Query to Patron letter is sent (see Viewing a Letter's Source XML).
   2. Add a borrowing request for an inventory item (make yourself the Requester; see Adding a Resource Sharing Borrowing Task From a Search).
   3. On the Resource Sharing Borrowing Requests page, select Send Query to Patron beneath the new request (see Managing Resource Sharing Borrowing Requests). If you have configured multiple query types, select the letter to send. Otherwise, a message is sent automatically.
You receive two emails: one is the selected letter and the other is the XML fields that were used to create the letter.

4. Save the XML letter to a file, such as letter.xml.

3. Modify the labels:
   1. On the Letters Configuration page, locate the Query to Patron Letter and edit it.
   2. For each label corresponding to the relevant codes that appear in the XSL, select Customize on the row actions menu and enter the new value in the Description column.

   The entries in the Code column (Type_1, Type_2, Type_3, and so forth) correspond to the query types you select in the Patron Query Types Code Table page (see Configuring Patron Query Types). For example, if you defined Type_1_query_name as enabled, you can configure the Type_1_xxxx entries in this table to configure the text lines to be part of this type of query.

3. Select Save.

4. Modify the XSL:
   1. Select the Template tab.
   2. In the Xsl field, modify the relevant XSL to change the format of your letter. The same XSL file is used to format all of the query types. You can add fields from the XML or labels, use the values of these fields to make conditions, and so forth.

   For example, a conditional clause looks something like:

   ```xml
   <xsl:when test="notification_data/query_type = 'Type_1_query_name'">
     ... special configurations for type 1 queries ....
   </when>
   ```

3. Select Save.

5. To test your changes, upload the XML (letter.xml) as described in Testing Letter Output and Viewing the Source XML.

Example Letter Customization: Borrowing Activity Letter

This example shows how to make the following customizations to the Borrowing Activity Letter email:

1. Change the name of the letter.
2. Add a library-specific message.
3. Display the material type in the list of loans.

Select here for an example of how to print a barcode to be a scannable barcode as opposed to numbers in the Borrowing Activity Letter.

To customize the Borrowing Activity letter:

1. Change the name of the letter to Patron Activity Letter:
2. Select **English** from the **Filter** drop-down list. Note that, in addition to changing the names of labels, you can also translate the labels for other languages.

3. Select **Customize** in the row actions list containing the **letterName** code.

4. In the **Description** field, change the text to **Patron Activity Letter**.

5. Select the **Save** page action to store the modified values.

2. Configure the XML output and view the sample:
   1. On the Template tab (see **Testing Letter Output and Viewing the Source XML**), view and edit the XML.
   2. To view the formatted sample letter, select **Preview Letter**.
   3. To send a sample letter, enter the email address in the **Send Example by Email** field on the **Letter Preview** window and select **Send**.
   4. Select **Save**.

3. Loan an item to a patron:
   1. On the Patron Identification page (see **Managing Patron Services**), enter a patron’s name in the **Scan patron’s ID or search for patron** field and select **Go**. The Patron Services page appears.
   2. In the **Scan item barcode** field, enter the item’s barcode and select **OK**. The item is listed in the **Loans** tab.

3. **Send Activity Report in Patron Services**

3. Select **Send Activity** to send the XML output in an email.

4. Copy and paste the XML output from the email to an XML file (such as **BorrowingActivityLetter.xml**).

4. Modify the XSL file to print a message for the **Main Library** only:
   1. On the Letters Configuration page, find and edit the **Borrowing Activity Letter**. Select the **Template** tab.
2. Use the XML file that you created earlier to determine the full path name of the field that contains the library name.

```
notification_data/overdue_loans_by_library/library_loans_for_display/item_loans/overdue_and_lost_loan_notification_display/item_loan/library_name
```

3. Search for the `@@loans@@` placeholder in the XSL file and add the `xsl:if` clause, shown in bold text shown below:

```
<xsl:if test="notification_data/item_loans/item_loan">
  <xsl:if test="notification_data/item_loans/item_loan/library_name='Main Library'">
    <center>
      <span style="font-family:Arial; font-weight:bold">
        <FONT COLOR="#FF0000">
          Please check due dates by logging in to your library.
        </FONT>
      </span>
    </center>
  </xsl:if>
  <tr>
    <td>
      @@loans@@
    </td>
  </tr>
</xsl:if>
```

Alma replaces the placeholders with the labels/translations that are defined in the associated Letters code tables.

5. While you are still editing the XSL file, add the `Type` column to the list of loans:

1. Below the `@@loans@@` placeholder in the XSL file, add the bold text as shown in the following figure.

```
...<xsl:if test="notification_data/item_loans/item_loan">
  <xsl:if test="notification_data/item_loans/item_loan/library_name='Main Library'">
    <center>
      <span style="font-family:Arial; font-weight:bold">
        <FONT COLOR="#FF0000">
          Please check due dates by logging in to your library.
        </FONT>
      </span>
    </center>
  </xsl:if>
  <tr>
    <td>
      @loans@</td>
  </tr>
</xsl:if>
```
The XML field for the material type was determined by examining the XML file.

Note
A placeholder could not be used for the new column heading because the material_type code is not configurable in the code table.

2. Select Save.

6. Test your changes to the XSL file by uploading the XML file that you created in step 2.
   2. Select Upload letter example and navigate to the XML file you want to upload. Select Open, then Upload.
   3. Select Preview in the row actions menu of the XML file you uploaded.
   4. Enter the email address in the Send Example by Email box and select Send.
   5. Alma sends the letter email to the specified email address.

7. Repeat step 3 to see the full customization as shown below:
Testing Letter Output and Viewing the Source XML

A template (XSL stylesheet) does not look much like the letter it is used to create, but it contains variable elements in a particular order. The template contains text and XML, as well as XSL commands and variables. Language-dependent text is kept out of the template.

The letter data comes from internally generated XML fields and from the labels. Label values and XML fields are substituted into the variables in the templates. For example, if the page POLineClaimLetter contains the label *greeting*, the value you enter into this label is substituted into `<xsl:variable name=greeting>` in the POLineClaimLetter template.

If you store the XML output in a file that has an .xml suffix, you can use it to test changes to the letter.

On the Letter Examples tab, you can make use of the available XML examples:

- You can use letters that were generated already in your institution, by selecting the "Add from system letters" option. This option only shows up to 10 most recent XMLs from the last 7 days.
- You can use DefaultLetter.xml - this file contains a default letter XML and can be used instead of the XML of a letter that was actually sent. When you click Download in the letter preview, this downloaded file appears here.
- You can use XML samples that were already uploaded. To upload samples, use the "Upload letter example (XML)" option.

You can edit or download the letter XML, as well as upload new XML samples. The row marked as Default Preview is the one that will be used when selecting the Preview row action. You can browse the latest server-side examples and download/add to your examples list. These examples are subject to the retention policy of the institution. The XML files saved in the system will be retained for 7 days and will be removed by the weekly cleanup job. The XML examples added
to the XML list from the system are persistent and will not be cleaned by the weekly job. Any identifying information should be removed from these examples.

Available row actions are:

- **Edit** - view and edit the letter XML. You can also select the Download XML option to download the file. Select Save when done.

- **Preview** - open an HTML presentation of the letter. Type an email address in Send Example by Email to send a sample of the letter with the template attached. Select a language from the language drop-down list to preview the letter in one of the languages configured for your system.

- **Delete** - delete a previously uploaded letter example from the table. The DefaultLetter cannot be deleted.

When done, select Save.

---

**Letter Examples Tab**

As an example, here is part of the XML output used to generate a Query to Patron letter.

```xml
<notification_data>
<general_data>
<address_c>None</address_c>
<address_c>None</address_c>
<address_from>nosuchmail@no.such.mail.com</address_from>
<current_date>01/08/2017</current_date>
<letter_channel_info></letter_channel_info>
<letter_name>Regarding your request</letter_name>
<letter_type>QueryToPatronLetter</letter_type>
<subject>Regarding your request</subject>
</general_data>
<languages>
<string>en</string>
</languages>
<letter_params>
<address_from>nosuchmail@no.such.mail.com</address_from>
<letter_name></letter_name>
<subject>Regarding your request</subject>
</letter_params>
<letter_texts></letter_texts>
<library>
<address>
<city>chicago</city>
<country>USA</country>
<country_display>United States</country_display>
<create_date>06/20/2014</create_date>
```
Contributing Letter Customizations to Community Zone

You can contribute XSL templates to the Community Zone and you can copy shared XSL templates from the CZ to your institution for local use, as well as preview how a template will work and look like before copying it over. This makes it much easier to share XSL templates between institutions.

To learn more, watch Contributing Letter Configurations to the Community Zone and Copying to Your Institution (5:30 mins)

In addition, download the presentation: How to contribute letter configurations to the Community Zone and copy them to the institution.

To contribute XSL templates to the Community Zone:

1. Access the letter you want to contribute to the CZ from the Letter Configuration page (Configuration > General > Letters > Letter Configuration).
2. Edit the letter as required, and then open the Templates tab.
3. Select Contribute.
4. Add a description that will help other users in the Community Zone understand your edits to the configuration, and provide the contact information by which other users can contact you in case they have questions.

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**Note**

By default, your email address appears in the Contact person. You can change this information, for example, to another user's email address or a phone number.
5. Select **Confirm**. The XSL template is contributed to the Community Zone.

6. If you or others from your institution attempt to contribute this same XSL configuration again, you are prompted: "**This letter was already contributed for this institution. Are you sure you want to overwrite?**", since the new contribution overwrites the previous contribution. Confirm to re-contribute.

7. If at some point your institution decides to stop sharing this letter, select **Shared XSL** on the Template tab, find your letter version in the list of versions contributed by all the contributing institutions, and select **Delete** in the row actions.

**To copy the customized XSL template to your institution:**


2. Select **Shared XSL**. This displays all of the XSL versions contributed by multiple institutions.

3. Select the desired version of the letter to copy to your institution. The selected version is copied over to your institution.

4. Select **Preview Letter** to see the changes. Select **Done** to close the preview.

5. Select **Save** to save the letter locally at your institution.

---

**Configuring Outgoing Email**

Alma sends emails to patrons, library staff, and vendors.

Every email has two “from” addresses:

- **From**: Appears in the user’s mail reader and determines the reply to address (if no other reply to address is specified).
- **EnvelopeFrom**: Used internally by mail relay servers to determine the origin of the message. This field appears as From (without the colon :) at the very top of the email packet when you look at the packet source, but does not normally appear in the user’s mail reader..

You can configure each outgoing email’s From: address by configuring the letter’s addressFrom label. (The exception to this is the General Message that you can send to any user when managing the user (see Editing Users). The default From: address for this message is set using the from_address parameter (see Configuring Other Settings).) If not configured, Ex Libris uses the default email address alma@exlibrisgroup.com. For some letters, such as several resource sharing letters, the From: address contains the library’s email preferred address, if this address is configured. If the address is not configured, the letters use ILL@exlibrisgroup.com as the From address. The list of letters with this behavior is:
You can configure the outgoing email EnvelopeFrom using the mail handling integration profile. For more information about integration profiles, see Configuring Integration Profiles. By default, the EnvelopeFrom is also alma@exlibrisgroup.com.

Note that if a recipient's email server (for patrons and staff, this is generally a server run by your institution) has set up a spam filter, the filter checks whether received emails are actually sent by the domain of the address in EnvelopeFrom. When there is a mismatch, emails may be filtered as spam. To prevent this from happening, EnvelopeFrom should remain <something>@exlibrisgroup.com (unless your institution's anti-spam filters and SPF records are configured properly so that this is not an issue). If you are not worried about emails being filtered as spam, you may want to configure EnvelopeFrom in order to catch bounced emails. Emails caught in an email server's spam filter do not generally result in bounced emails.

Note

• Replies to emails go to the email header From: field, unless the email has a Reply-To: field.
• Purchase order and claim notifications ignore the configured addressFrom field in the letter when an email address is defined in the institution for order response or claim response, respectively. See Configuring Institution/Library Contact Information and Communicating with Vendors.

Instead of configuring EnvelopeFrom, you can instead use the mail handling integration profile to have Alma send all email through the institution’s mail relay server. In this case, the mail relay server sets EnvelopeFrom on the outgoing email.

Note that email messages sent from Ex Libris hosted servers might be marked as Spam. To prevent this from happening, see Mail device configuration on Ex Libris servers and/or applications.

To configure the mail handling integration profile:
1. On the Integration Profile List page (Configuration Menu > General > External Systems > Integration Profiles), select **Add Integration Profile**. Alma allows you to define only one mail handling integration profile. If there is already a mail handling integration profile, select **Edit** in the row actions list to edit the profile.

![Integration Profile List Page](image)

2. Enter a unique code and name for the profile.

3. In the **Integration Type** field, select **Mail Handling**.

4. Select **Next**. The second page of the wizard appears. **Active** is selected by default.

![Integration Profile Page 2](image)

5. To continue to use Alma's mail server:
   1. Select **Send directly from Ex Libris** (selected by default).
   2. Enter a valid email address for **EnvelopeFrom**.

6. To use your institution's mail relay server:
   1. Select **Send using institution mail relay**. Several additional fields appear.
   2. Enter the institution domain name. After you do this, the domain name appears after the SMTP EnvelopeFrom address field as `<domain name>`. The domain name can contain up to 63 lower case alphanumeric characters, dashes - , and periods followed by a period and a two to six character lower case alphabetic top-level domain.
   3. Enter the institution SMTP mail relay host name. The host name can contain lower case alphanumeric characters as well as any of the characters - ! # $ % & ' * + / = ? ^ _ `{ | } or ~ and a period.
   4. **Custom SMTP EnvelopeFrom address** is selected by default. Enter a username of the address in the unlabeled field below this option. This sets EnvelopeFrom to `<username>@<domain name>`. The username can contain the same characters as the SMTP mail relay host name.
   5. If you want, instead, that the EnvelopeFrom of each email outgoing from the institution mail relay be the same as the From: address of that email message, select **Use the 'From address' header**.
   6. If the mail relay requires a username and password to accept email from Ex Libris, enter the username and password. These can be any ASCII characters.
6. If the mail relay requires encryption, select **Use encryption**. Encryption port is set to **587** for you.

7. Select **Save**.

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**Letter List**

The following table lists the letters available in Alma.

Notes regarding the following columns in the Alma Letters table below:

- The **Translation Eligible** column corresponds to the **Patron Facing** column in the Alma Letters Configuration page. In both cases, a yes, or check mark, in this column means that the letter is eligible for translation for environments using languages other than English.

<table>
<thead>
<tr>
<th>Letter Name</th>
<th>Letter Description</th>
<th>Category</th>
<th>Channel</th>
<th>Translation Eligible (<em>Patron Facing</em> flag in Alma)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytics Letter</td>
<td>Contains an analytics report that is sent to report subscribers. For more information see <a href="#">Subscribing to Scheduled Reports</a>.</td>
<td>Analytics</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Borrowed By Letter</td>
<td>Sent to patrons indicating that a proxy user has borrowed an item on their behalf. For details on working with proxy users, see <a href="#">Managing Proxy Users</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Borrower Claim Email Letter</td>
<td>For peer-to-peer partners, the letter is sent when the <strong>Automatic Claim</strong> field is enabled on the borrowing request and the value of the <strong>Time to Claim</strong> (days) is reached. See <a href="#">Resource Sharing Partners</a>.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Borrower Overdue Email Letter</td>
<td>Sent by the lending institution to the borrowing partner when a resource is overdue. When sent using ISO protocol, the request on the borrowing side is automatically marked as overdue.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Borrower Receive Email Letter</td>
<td>Sent to the lending institution when the loaned item has been received at the borrowing institution.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Borrower Return Email Letter</td>
<td>Sent to the lending institution when the borrowing institution has returned the loaned item.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Borrowing Activity Letter</td>
<td>Sent to patrons with activity; contains a list of the patron’s loans, overdue items, and active fines. If the patron has more than 100 active loans, only the first 100 are included on the letter and a flag is added to the XML - <code>&lt;loans_over_the_limit&gt;true&lt;/loans_over_the_limit&gt;</code>. Sent either by a job (Notifications – Send Periodic Fulfillment Activity Report) or by request, for example, the <strong>Renew Selected</strong> and <strong>Renew All</strong> actions on the Loans tab of the Patron Services page. For details on configuring the Borrowing Activity Report, see <a href="#">Configuring Fulfillment Jobs</a>. This letter can be activated to trigger a webhook function. See <a href="#">Webhooks</a>.</td>
<td>Fulfillment</td>
<td>Email, SMS, Webhook</td>
<td>Email - Yes, SMS - Yes, Webhook - No</td>
</tr>
<tr>
<td>Cancel Request Letter</td>
<td>An SMS message sent to patrons indicating the reason for the request cancellation. For more information, see the <a href="#">email format for Cancel Request Letter</a>.</td>
<td>Fulfillment</td>
<td>SMS</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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Ex Libris, Part of Clarivate
<table>
<thead>
<tr>
<th>Letter Name</th>
<th>Letter Description</th>
<th>Category</th>
<th>Channel</th>
<th>Translation Eligible ('Patron Facing' flag in Alma)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Rapido Request Terms Letter</td>
<td>For future use</td>
<td>Rapido</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Cloud IdP User Created Letter</td>
<td>For future use</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Collection Contribution Letter</td>
<td>Sent to users as an initial response to a contribution to the Community Zone. For detailed information, see Contributing Local Electronic Collections to the Community Zone.</td>
<td>Resource management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Collection Contribution Update Status Letter</td>
<td>Sent to users as a follow-up to a contribution to the Community Zone.</td>
<td>Resource management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Conversation Letter</td>
<td>Used to communicate with vendors. See Communicating with Vendors. The customer parameter: conversation_send_from_logged_in_user_address enables conversation letters to be configured as being sent from the logged in user's email (as address &quot;From&quot;) or the library's. See Customer Parameters Mapping Table.</td>
<td>Acquisition</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
| Courtesy Letter | Sent to patrons in a nightly job; contains a list of the patron's loans that are due soon. Generated when the Notifications - Send Courtesy Notices and Handle Loan Renewals job runs and one of the following occurs:  
  • The conditions of an automatic loan renewal rule are not met  
  • A block exists on the patron or item, preventing item renewal (see Configuring Block Preferences)  
  
  For details on configuring courtesy notices, see Configuring Fulfillment Jobs.  
  
  For short loans, if the short_loan_courtesy_reminder parameter is set, this letter is triggered based on the due date time, less the value of the parameter. The letter will be sent if the item was not returned, is not in Lost or Claim Return status, and the current due date time is the same as the due date time that was on the item when the reminder was triggered. The loan due date time can change due to a renewal, recall, or manual change of due date.  
  
  In addition to a short loan indicator that is available in the source XML, this letter has a configurable label in the code table. To see this label, you must be using the XSL file in the default, out-of-the-box format. If you have customized the XSL file, the short loan label is not available. | Fulfillment | Email SMS | Yes |

Note
If the date by which the request is needed has passed, this letter is no longer sent.
<table>
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<tr>
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<th>Translation Eligible (‘Patron Facing’ flag in Alma)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Registration Status Letter</td>
<td>Sent to patrons by email to notify them when they join the waitlist, when a resource becomes available, and when the grace period expires.</td>
<td>Digital</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Delivery Registration Status Letter</td>
<td>Sent to patrons by SMS to notify them when they join the waitlist, when a resource becomes available, and when the grace period expires.</td>
<td>Digital</td>
<td>SMS</td>
<td>Yes</td>
</tr>
<tr>
<td>Deposit Activity Letter</td>
<td>Indicates the status of active deposits. For detailed information, see <a href="#">Configuring the Deposit Activity Report Job</a>.</td>
<td>Digital</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Deposit Status Update Letter</td>
<td>Sent to depositors when their deposit is submitted, approved, declined, returned, or withdrawn. See <a href="#">Configuring Patron Deposit Templates</a>.</td>
<td>Digital</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Document Delivery Notification Letter</td>
<td>When a patron has requested digital material and the send method on the request is Attach Documents - Link, this notification is sent to patrons to provide links to the file. See <a href="#">Attaching Digitized Items To Be Sent To a Patron</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Download Files Job Letter</td>
<td>Sent after running the Download Files job to download the files of a digital title into a zip file (see <a href="#">Download Files</a>). This letter informs you that the job is completed.</td>
<td>Digital</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Email Records Letter</td>
<td>Sent to patrons manually for records selected in Primo VE.</td>
<td>Primo</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Export User Letter</td>
<td>A way to transfer files via FTP (the FTP receiver mechanism of the letters) used by the student information system (SIS) jobs. Does not contain any fields. For information about the jobs, see <a href="#">Student Information Systems</a>.</td>
<td>User management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Externally Obtained Email</td>
<td>Sent to patrons; contains a URL for a requested article obtained through the CCC GetItNow service.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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For information about the jobs, see [Student Information Systems](#).
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<tbody>
<tr>
<td>Letter</td>
<td>See <a href="#">Adding a Request For a CCC GetItNow Resource</a>.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fine Fee Payment Receipt Letter</td>
<td>Sent to patrons; indicates that payment has been received. See <a href="#">Viewing Fines and Fees and Receiving Payments</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Fines and Fees Report Letter</td>
<td>A report of the fine and fee transactions that have been performed over a 1- to 7-day period. For details on configuring the fines and fees report, see <a href="#">Creating Fines and Fees Reports</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Ful Borrowing Info Letter</td>
<td>Sent to patrons; indicates whether a loaned resource sharing item was successfully renewed. See <a href="#">Managing Resource Sharing Borrowing Requests</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Ful Cancel Email Letter</td>
<td>Indicates that a resource sharing request has been canceled. Sent to partners automatically when a resource sharing borrowing request is sent to a partner whose Type = Email. See <a href="#">Managing Resource Sharing Borrowing Requests</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Ful Cancel Request Letter</td>
<td>Sent to patrons; indicates that a request has been canceled and the reason for the cancellation. See <a href="#">Managing Active Hold Shelf Items</a> and <a href="#">Pickup at Shelf</a>. This letter can be activated to trigger a webhook function. See <a href="#">Webhooks</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes - Webhook - No</td>
</tr>
<tr>
<td>Ful Digitization Notification Item Letter</td>
<td>A slip that is printed out by library staff of a reading list citation so that the item can be retrieved from the shelf. For details on reading list citations, see <a href="#">Managing Citations</a>. You may include a printable barcode image on this letter.</td>
<td>Courses</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Ful Citations Slip Letter</td>
<td>A slip that is printed out by library staff of all course reading list citations so that the items can be retrieved from the shelf. For details on reading list citations, see <a href="#">Managing Citations</a>.</td>
<td>Courses</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Ful Damaged Email Letter</td>
<td>Sent to the lending partner to notify them that a resource sharing item has been damaged. See <a href="#">Managing Resource Sharing Borrowing Requests</a>.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Ful Citations Slip Letter</td>
<td></td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
</tbody>
</table>
configuring digitization departments for processing digitization requests, see [Configuring Digitization Departments](#).

If Alma automatically attempted to add the file to a citation, the email also includes the status of that attempt.

If the digitization request is for a citation in a reading list, the librarian assigned to the list is also notified. If you are implementing Leganto, the librarian configured for assign_to is also notified. See [Configuring Leganto Copyright-Related Procedures](#).

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<tbody>
<tr>
<td>Ful Fines/Fees Notification Letter</td>
<td>Sent to patrons by a job to inform them of fines or fees they owe. See <a href="#">Configuring Fines/Fees Notifications</a>.</td>
<td>Fulfillment</td>
<td>Email - Yes</td>
</tr>
<tr>
<td>Ful Hold Shelf Request Slip Letter</td>
<td>When enabled, the letter is printed to the circulation desk printer when the item is placed on the hold shelf, regardless of whether a pick slip was already printed. If printing fails, the item is still placed on the hold shelf but the user receives a warning message that printing failed. This way, it is possible to configure a slip for use for on hold shelf items, that is different than the slip that is used to pick the item from the shelf. By default, the letter has the same attributes as the Pickup Print Slip Report Letter, but it can be configured as needed. The letter is invoked when scanning in an item and placing it on the hold shelf and when selecting the Activate next function on the expired hold shelf page.</td>
<td>Fulfillment</td>
<td>No</td>
</tr>
<tr>
<td>Ful Incoming Slip Letter</td>
<td>A slip that is printed out by library staff from the Resource Sharing Lending Requests Task List when they need to retrieve an item from the shelf to be shipped to a borrower (see the print slip description in <a href="#">Receiving Physical Material</a>). You may include a printable barcode</td>
<td>Resource sharing</td>
<td>No</td>
</tr>
<tr>
<td>Letter Name</td>
<td>Letter Description</td>
<td>Category</td>
<td>Channel</td>
</tr>
<tr>
<td>-----------------------------------</td>
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</tr>
<tr>
<td>Ful Lost Email Letter</td>
<td>Sent to the lending partner to notify them that a resource sharing item has been lost. See Managing Resource Sharing Borrowing Requests.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Lost Loan Letter</td>
<td>An invoice letter (for the replacement fee) sent to the borrowing patron when a loan is overdue and the item is declared lost, according to the criteria described in Adding an Overdue and Lost Loan Profile. Each letter generated is for a single item. The letter is sent when manually changing the loan to lost. Additionally, if the switch_to_overdue_and_lost_loan_new_job parameter is set to false (see Configuring Other Settings), the Loans - Overdue and Lost Item job will also generate this letter. However, if the switch_to_overdue_and_lost_loan_new_job parameter is set to true, the job sends the Ful Overdue and Lost letter instead (see below).</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Lost Loan Notification Letter</td>
<td>A warning sent to patrons when a loan is overdue, before the item is declared lost, according to the criteria described in Adding an Overdue and Lost Loan Notification. Sent by the Loans - Overdue and Lost Item job when the switch_to_overdue_and_lost_loan_new_job parameter is set to false (see Configuring Other Settings).</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Lost Refund Fee Loan Letter</td>
<td>Sent to patrons when a loan that was declared lost is found. Includes refund if applicable.</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Outgoing Email Letter</td>
<td>The borrowing request sent to a partner with profile type Email.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Overdue And Lost Loan Letter</td>
<td>An invoice letter (for the replacement fee) sent to the borrowing patron listing all overdue loans that have been declared lost, according to the criteria described in Adding an Overdue and Lost Loan Profile. It is sent to patrons by the Loans - Overdue and Lost Item job when the switch_to_overdue_and_lost_loan_new_job parameter is set to true (see Configuring Other Settings). For short loans, the short_loan_overdue_reminder parameter is set, this letter is triggered based on the due date time plus the value of the parameter for multiple items. The letter will be sent if the items were not returned, are not in Lost or Claim Return status, and the current due date time for each item is the same as the due date time that was on each item when the reminder was triggered. The loan due date time can change due to a renewal, recall, or manual change of due date.</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Overdue And Lost Loan Notification Letter</td>
<td>A warning sent to patrons listing all overdue loans before the items are declared lost, according to the criteria described in Adding an Overdue and Lost Loan Notification. Sent by the Loans - Overdue and Lost Item job when the switch_to_overdue_and_lost_loan_new_job parameter is set to true (see Configuring Other Settings). For short loans, the short_loan_overdue_reminder parameter is set, this letter is triggered based on the due date time plus the value of the parameter for multiple items. The letter will be sent if the items were not returned, are not in Lost or Claim Return status, and the current due date time for each item is the same as the due date time that was on each item when the reminder was triggered. The loan due date time can change due to a renewal, recall, or manual change of due date.</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Personal Delivery Letter</td>
<td>Sent to a patron when an item is scanned in for personal delivery from a circulation desk that supports personal delivery.</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Pickup Print Slip Report Letter</td>
<td>Sent to users. Contains a detailed list of resources to be picked up.</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Letter Name</td>
<td>Letter Description</td>
<td>Category</td>
<td>Channel</td>
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<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Ful Renew Email Letter</td>
<td>Indicates that a resource sharing request has been renewed. Sent to partners automatically when a resource sharing borrowing request is sent to a partner whose Type = Email.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Requests Report Letter</td>
<td>A patron report listing all request items, broken down by Not Active, In Process, and On Hold Shelf. For details on running the report for a single patron, see Managing Patron Services. For details on running the report on a schedule, see Configuring Fulfillment Jobs.</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Resource Request Slip Letter</td>
<td>A slip that is printed out by library staff from the Pick Up Requested Resources page when they need to retrieve an item from the shelf. For details on pickup up items from the shelf, see Pickup at Shelf. You may include a printable barcode image on this letter. This letter is also printed when an item that had a hold request is returned.</td>
<td>Fulfillment</td>
<td>Email</td>
</tr>
<tr>
<td>Ful Transit Slip Letter</td>
<td>Sent by the Create Physical Item Move Requests job when Print Transit Letter is set to Yes. You may include a printable barcode image on this letter. This letter is also printed out by library staff and is added to an item when it is sent from one place to another.</td>
<td>Inventory</td>
<td>Email</td>
</tr>
<tr>
<td>General Assign To Letter</td>
<td>This is used when a staff user assigns a record to another staff user and selects the Send as email option. Possible examples of this are: • when a staff user assigns a cataloging record to another user • when a staff user assigns an electronic resource activation task.</td>
<td>User management</td>
<td>Email</td>
</tr>
<tr>
<td>General Message Email Letter</td>
<td>An email sent to the resource sharing partner to alert them of a new general message that has been entered on the request.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>ILL Email to User</td>
<td>Manually sent from the User Details page.</td>
<td>User management</td>
<td>Email</td>
</tr>
<tr>
<td>ILL Email to User</td>
<td>Note</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>This letter cannot be customized.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interested In Letter</td>
<td>Informs someone who is registered as “interested in” about a change in a PO line status. For details on interested users, see the description in Find PO Lines for Receiving Fields in Receiving Physical Material.</td>
<td>Acquisition</td>
<td>Email</td>
</tr>
<tr>
<td>Interested Users In Letter</td>
<td>Lists the interested users when Print Interested Users List is selected on the Receiving New Material page. For more information, see Receiving Material.</td>
<td>Acquisition</td>
<td>Email</td>
</tr>
<tr>
<td>Invoice Payment Letter</td>
<td>The finance export job requires you to activate the Invoice Payment Letter.</td>
<td>Acquisition</td>
<td>Submission</td>
</tr>
<tr>
<td>Item Change Due Date Letter</td>
<td>An SMS message sent to patrons indicating changes to the due date. For details on managing patron activities, see Managing Patron Services. For more information on the letter, see the email format for Fulfillment</td>
<td>Fulfillment</td>
<td>SMS</td>
</tr>
<tr>
<td>Letter Name</td>
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</tr>
<tr>
<td>Item Change Due Date Letter</td>
<td>For the email version of this letter, see Loan Status Notice.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal Deposit Annual Receipts Letter</td>
<td>Sent to vendors with an annual report about serial legal deposits.</td>
<td>Acquisition</td>
<td>Email</td>
</tr>
<tr>
<td>Legal Deposit Claim Letter</td>
<td>Sent to vendors to remind them of a previous request a copy of an item as required by law.</td>
<td>Acquisition</td>
<td>Email</td>
</tr>
<tr>
<td>Legal Deposit Order Letter</td>
<td>Sent to vendors to request a copy of an item as required by law.</td>
<td>Acquisition</td>
<td>Email</td>
</tr>
<tr>
<td>Legal Deposit Receipt Letter</td>
<td>Sent to vendors to confirm the receipt of a copy of an item requested as required by law.</td>
<td>Acquisition</td>
<td>Email</td>
</tr>
<tr>
<td>Leganto Detailed Notifications Letter</td>
<td>Sent to instructors when notifications are waiting for them in Leganto. It aggregates the pending notifications by list for a given course into a single letter. Appears only if Leganto is enabled in your institution</td>
<td>Leganto</td>
<td>Email</td>
</tr>
<tr>
<td>Leganto Notifications Letter</td>
<td>Sent to instructors when notifications are waiting for them in Leganto. For more information, see Viewing Scheduled Jobs. Appears only if Leganto is enabled in your institution</td>
<td>Leganto</td>
<td>Email</td>
</tr>
<tr>
<td>Leganto Upcoming Due Dates Notifications Email Letter</td>
<td>Sent to students nine days before an upcoming due date. Sent only if email_notifications_group value is set to ALL.</td>
<td>Leganto</td>
<td>Email</td>
</tr>
<tr>
<td>Lender Checked-In Email Letter</td>
<td>Sent to the borrowing partner when an item was checked in at the lending institution.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Lender Reject Email Letter</td>
<td>Sent to the borrowing partner when the lending partner has rejected a lending request.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Lender Renew Response Email Letter</td>
<td>Sent to the borrowing partner when the lending partner responds to a renewal request.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Lender Ship Email Letter</td>
<td>Sent to the borrowing partner to indicate that the requested item has been shipped.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Lender Will Supply Email Letter</td>
<td>Sent to the borrowing partner when the status of a resource sharing request changes to Will Supply.</td>
<td>Resource sharing</td>
<td>Email</td>
</tr>
<tr>
<td>Letter Name</td>
<td>Letter Description</td>
<td>Category</td>
<td>Channel</td>
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</tr>
</tbody>
</table>
| Lending Recall Email Letter       | Sent to the borrowing partner when an item is recalled and must be returned.  
See Adding a Work Order Type.                                                                                                                                  | Resource sharing     | Email   | Yes                                           |
| Lending Requests Report Slip Letter | A slip that is printed out by library staff for the selected requests in the lending task list that lists the availability of the items so that they can be taken off the shelf and shipped to the requester.  
For more information see Managing Resource Sharing Lending Requests.                                                                                     | Resource sharing     | Email   | Yes                                           |
| License Printout Letter           | Used when printing out a license.  
See Printing Licenses or Amendments.                                                                                                                               | Resource management  | Email   | No                                            |
| Loan Receipt Letter               | Sent to patrons after items are loaned from the circulation desk.                                                                                                                                                  | Fulfillment          | Email   | Yes                                           |
| Note                              | Any change done to a user's loan generates a Loan Receipt (in addition to any other "designated" letter that will be sent) - for example changing the due date of a loan will trigger the Loan Status Notice, clicking "Done" will then initiate a Loan Receipt for the updated loan. For details on borrowing items from the circulation desk, see LOAing Items. |
| Loan Status Notice                | Sent to patrons; indicates changes in the status of a loan or the due date, including changes such as:  
• A due date changes, regardless of whether a recall has been issued.  
• A recall is issued but the due date hasn’t changed.  
For the SMS version of this letter, see Item Change Due Date Letter.  
For details on managing patron activities, see Managing Patron Services.  
This letter can be activated to trigger a webhook function.  
See Webhooks.                                                                                                                                          | Fulfillment          | Email   | Webhook - Yes  
                                   |                                                                           |                      | Webhook  - No |                                               |
| Login Using One Time Token Letter | Email letter that is sent to a patron for a one time login to Primo.  
See Primo Login Using Email.                                                                                                                                       | Primo                | Email   | Yes                                           |
| Notify E-Activation due Letter    | Sent by the Notify E-Activation Due Task job to the assigned operator when an electronic activation task's due date has passed.  
For more information on the e-activation due date, see Manually Creating a PO Line, Managing Electronic Resource Activation, and Configuring Other Settings.          | Acquisition          | Email   | No                                            |
| Notify Upon Renewal Letter        | Sent to a user when a continuous PO line with inventory is sent for manual renewal.  
For more information, see step 10 in Editing PO Line.                                                                                                          | Acquisition          | Email   | No                                            |
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<tr>
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<tr>
<td>On Hold Shelf Letter</td>
<td>Sent to patrons; indicates that an item is ready for pickup at the hold shelf. For details on picking up items from the hold shelf, see Managing the Hold Shelf. This letter can be activated to trigger a webhook function. See Webhooks. Note For information on customizing the On Hold Shelf letter to display the Notes that may affect loan line only if there is a block on the patron, see Customizing Letter Templates.</td>
<td>Fulfillment</td>
<td>Email, SMS, Webhook</td>
<td>Email - Yes, SMS - Yes, Webhook - No</td>
</tr>
<tr>
<td>On Hold Shelf Reminder Letter</td>
<td>Sent to the patron after a set number of days. The letter is sent by the Send Hold Shelf Reminders job. It is possible to configure how many days after being placed on the hold shelf the reminder will be sent, and whether the reminder will continue to be sent at the configured interval until the Hold Shelf expiry.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Order List Letter</td>
<td>Sent to vendors; contains a list of ordered items. See Approving and Sending POs. This letter is not used if the order is done using EDI or another automatic system.</td>
<td>Acquisition</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Order Now Letter</td>
<td>Sent to the staff user who selects Order Now, which initiates an immediate order that bypasses the usual procedure. The letter indicates whether the order is successful. See Manually Creating a PO Line, Reviewing PO Lines, and Packaging PO Lines into a PO.</td>
<td>Acquisition</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Overdue Notice Letter</td>
<td>Sent to patrons; contains a list of all the patron’s loans due that day. Sent in a nightly job (Notifications – Send Due Date Reminders). See Configuring Overdue and Lost Loan Profiles. Note The item details in this letter represent the item at the time of the loan.</td>
<td>Fulfillment</td>
<td>Email, SMS</td>
<td>Email - Yes, SMS - Yes</td>
</tr>
<tr>
<td>Overlap and Collection Analysis Letter</td>
<td>Sent to a staff user who runs an overlap and collection analysis job. The letter indicates that the overlap and collection analysis job has completed. For more information regarding overlap and collection analysis, see to Working with Overlap and Collection Analysis.</td>
<td>Resource management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Owner Subscription Letter</td>
<td>Sent to an instructor when added as an owner of a reading list. For more information, see Managing Reading List Owners and Collaborators.</td>
<td>Courses</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Patron Welcome</td>
<td>This letter is sent when adding a patron role to a user, whether manually,</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
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<tr>
<td>Letter</td>
<td>through a job, or via SIS. The letter is not sent when the patron role is added through a merge or migration. If you do not wish send the letter if the patron role was added by a linked account, you can do that by adding a condition to the XSL file that will prevent sending the letter in this case. The XML for the letter includes an indicator for if the role was added by a linked account. This indication can be used to stop the letter from being sent the document. How to configure a letter to not be sent under certain circumstances, shows an example of how this can be done.</td>
<td></td>
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</tr>
<tr>
<td>PDA Threshold Letter</td>
<td>Sent to the PDA manager (PDA contact person) when the usage of PDA reaches the alert threshold. See Patron Driven Acquisitions.</td>
<td>Administration</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>PIN Number Generation Letter</td>
<td>Sent to patrons when a PIN code is set in the user management pages. For details on configuring user details, see Adding Users.</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>PO Line Cancelation Letter</td>
<td>Sent to vendors, requesting that an order be canceled. For details on canceling a PO line, see Canceling PO Lines.</td>
<td>Acquisition</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>PO Line Claim Letter</td>
<td>Sent to vendors when an order does not arrive by the expected date (see Processing Claims). The fields for the Subject are available in the new_subject field. The field is set by entering your text within &lt;&gt; + field name. The format is as follows: &lt;My Title Text: &gt; title &lt;My Ref Num Text: &gt; poline_reference_number &lt;My Item Desc Text: &gt; item_description Following are the fields that can be used within the subject field: • title • poline_reference_number • item_description - only for Physical Continuous type • identifier_type and item_identifier</td>
<td></td>
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</tr>
<tr>
<td>PO Line Renewal Letter</td>
<td>Sent to vendors, requesting that a subscription be renewed. For details on renewing PO lines, see Renewals. For details on configuring automatic renewal of a PO line, see Configuring Fulfillment Jobs.</td>
<td>Acquisition</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Process Bib Export Finished Letter</td>
<td>Sent to a staff user, indicating that a bibliographic export has finished. For details on exporting bibliographic records, see Export bibliographic records in Running Manual Jobs on Defined Sets.</td>
<td>Resource management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Process Creation</td>
<td>Sent upon successfully scheduling some user-submitted jobs — for example, jobs run on the Run a Job page (see Running Manual Jobs on</td>
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Ex Libris, Part of Clarivate
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<td>Purchase Request Status Letter</td>
<td>Sent to requester of a purchase request when the request is received, approved, or rejected. For more information, see Purchase Requests.</td>
<td>Acquisition</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Pz System Job Letter</td>
<td>A report sent to the email specified in the API request, which summarizes information from the portfolio loader and MD import jobs that had been triggered via the Provider Zone Job.</td>
<td>Resource management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Query to Patron Letter</td>
<td>Sent to patrons when the user selects Send Query to Patrons from a resource sharing request. See Peer-to-Peer Resource Sharing. This letter is only used when the institution is using patron query types; see Configuring Patron Queries. To configure, see Example Letter Customization: Query to Patron Letter.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Query to Requester Letter</td>
<td>Sent to requester of a purchase request when the librarian queries him or her for more information. For more information, see Purchase Requests.</td>
<td>Acquisition</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Receiving Slip Letter</td>
<td>A slip that is printed out by library staff with item information that is put in a new item when it arrives at the library. You may include a printable barcode image on this letter. For details on receiving material, see Receiving Physical Material.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Resend Notification Letter</td>
<td>Sent manually to a patron if the patron did not receive an attachment. For more information, see User Attachments.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Reset Password Letter</td>
<td>Sent from various workflows, and includes a link to a page which allows the recipient to change (or create) his or her password.</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Resource Sharing Receive Slip Letter</td>
<td>A slip that prints automatically when the Automatic Print Slip option is selected on Receiving Items. You may include a printable barcode image on this letter.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Resource Sharing Request Confirmation Letter</td>
<td>When configured (Configuration &gt; General &gt; Letters &gt; Letters Configuration &gt; Resource Sharing Request Confirmation Letter), Alma now sends a confirmation email when a request is placed. This letter is disabled by default.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Resource Sharing Return Slip Letter</td>
<td>Printable when returning a borrowing item to the lender. You may include a printable barcode image on this letter. Printing the letter will take place if: • Scanning in an item triggers a return (including Managing Patron)</td>
<td>Resource sharing</td>
<td>Email</td>
<td>Yes</td>
</tr>
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<tr>
<td>Resource Sharing Shipping Slip Letter</td>
<td>Sent to a user when the user selects the <strong>Ship Item</strong> link for a lending request and then selects ** Automatically Print Slip = Yes** on the Shipping Items page. You may include a printable barcode image on this letter. See <a href="#">Shipping Items</a>.</td>
<td>Resource sharing</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Restricted Login IP Letter</td>
<td>Sent to managers when a login attempt is made from a restricted IP address. For more information, see <a href="#">Security</a>.</td>
<td>Administration</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Return Receipt Letter</td>
<td>Sent to patrons after items are returned to the circulation desk. For details on returning items to the circulation desk, see <a href="#">Returning Items</a>.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>SAML Certificate Expiration Notification Letter</td>
<td>Sent to users with the General Systems Admin role to remind them their SAML certificate is nearing expiry date and recommend that they consult with their IT department regarding the potential need to replace it. Sent approximately 60 days and 30 days before expiration. See <a href="#">Replacing a Signed Certificate</a>.</td>
<td>Administration</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Saved Searches Letter</td>
<td>This letter is a weekly letter triggered by the Saved Searches Alerts scheduled job, which sends new results of saved Primo VE search queries to the patron.</td>
<td>Primo</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Short Loan Letter</td>
<td>Sent to a patron when loaning an item for a short period (a number of hours), informing the patron of the due date and the fine policy. For details on loaning items, see <a href="#">Loaning Items</a>. This letter may have to be enabled for some customers.</td>
<td>Fulfillment</td>
<td>Email</td>
<td>Yes</td>
</tr>
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</table>
| Shortened Due Date Letter | Sent to patrons to notify them that the due date of their loan has been shortened. This happens at the time of loan or renewal. However, at renewal time, the letter is only triggered if the renewal is done by staff from the Manage Patron Services page. If the renewal is done by the patron in Primo, the shortened due date is displayed to the patron immediately. The letter data contains the loan object and the message, The possible messages are:
- Please notice that the due date was shortened since the item is recalled
- Please notice that the due date was shortened since the patron card is expired before the due date
- Please notice that the due date was shortened since the loan conflicts with a booking request
For setting the parameter, **shortened_due_date_notifications**, see | Fulfillment | Email | Email - Yes |
<p>| | | | SMS | SMS - Yes |</p>
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</tr>
<tr>
<td>Social Login Account Attached Letter</td>
<td>Sent after attaching a user account to a social logic provider. For library staff, the email includes a link which can be used to quickly log in to Alma.</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Social Login Invite Letter</td>
<td>An email sent to staff users inviting them to use social network logins instead of the standard Alma login. For more information, see Social and Email Login.</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>System Job Letter</td>
<td>Sent when jobs initiated in Alma start and complete (letter is sent to the user who initiated the job). For details on configuring Alma jobs (processes), see Managing Jobs.</td>
<td>Administration</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Trial Letter</td>
<td>Contains a request to evaluate an electronic resource. For details on evaluating resources, see Evaluation Workflow.</td>
<td>Acquisition</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>Update Collection Contribution Letter</td>
<td>Sent to users after they update a collection and re-contribute it to the Community Zone. For more information, see Contributing Local Electronic Collections to the Community Zone.</td>
<td>Resource management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>User Deletion Letter</td>
<td>Sent to a patron before the patron is deleted, containing details of the patron’s active fines and fees. See Deleting Users.</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>User Notifications Letter (New Gen)</td>
<td>Sent to users who elected to receive email notifications via the Notifications interface (that is currently available only in Rialto, see User Notifications in Rialto).</td>
<td>Rialto</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>User Notifications Letter</td>
<td>Sent to users using the Update/Notify Users job. For more information, see Configuring User Notification Types.</td>
<td>User management</td>
<td>Email</td>
<td>Yes</td>
</tr>
<tr>
<td>User Registration Letter</td>
<td>Not in use</td>
<td>User management</td>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>Webhook Failure Letter</td>
<td>Sent to all email contacts defined on a webhook integration profile if a webhook message is not successfully sent after 4 attempts (across 10 hours) when a 5XX HTTP response is received. For more information on the retry mechanism, see the Developer Network.</td>
<td>Administration</td>
<td>Email</td>
<td>No</td>
</tr>
</tbody>
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