Dear Patron Moynihan,

Customizing Letters and Notices in Alma

Sincerely, Lori Hilterbrand
Why letters happen…

• An item has been requested, received, purchased, loaned, returned, recalled, or the due date has changed.
• An item is going to be due soon, is due today, is overdue, or has been billed.
• Your account or your password is expiring.
• You have run a job.
• Alma hates you.
...and how to prevent them.

Disable unwanted notices in the Letter Activity table

OR...
Un-schedule them in the Fulfillment Jobs Configuration chart

OR…
Configure the Library Notices Opt In table to your liking.

Patrons or staff can adjust these settings individually in the patron record once the defaults are set!
Time to Customize!

Back we go to the General Configuration menu, and our letter customization tools.

For the next steps, we’ll be using the Letter emails link and the Customize Letters link.
The Borrowing Activity Letter

AKA: ../xsl/letters/FulUserBorrowingActivityLetter.xsl
AKA: Send Activity Report
AKA: The source of nearly a thousand angry emails and phone calls
AKA: The prompter of a 3-fold increase in materials returns over the winter holiday

We needed to edit this letter!
What’s the Problem?

Borrowing Activity Letter
12/08/2014

Hilterbrand, Lori
Library- Access Services
Access Services/Circulation
The Valley Library
Corvallis OR 97331

Dear Patron Hilterbrand

The following items are overdue. Please return or renew them today:

Here’s what you have checked out:

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Fine</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nexus Tablet 10</td>
<td>12/08/2014</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Best regards
OSU Libraries Circulation

Oregon State University
We started by looking at the presets using the “Letters email” link and choosing the letter from the list.

Here’s what we found. Phrases like “We would like to remind you that you have a debt.” were not going to be game winners.

After some word-smithing, we came up with what we think is an improvement.
But we still had this problem:

In the “Customize Letters” link we found the file for Borrowing Activity Letter and opened it up. Here’s what we found:

So next we got to have a lesson in XLS and XML. It’s easier than it sounds so don’t be afraid.
The “reminder_message” and the “overdue_loans” fields from the presets come first. We want the loans that AREN’T overdue to come first. And, the “reminder_message” will show whether or not there are overdue loans because it comes before the “if test” for overdues.
Best Practice Alert...

- Before you change ANYTHING – make a backup. XSL and XML both save nicely in Notepad, or many other text editors. Save the last known working script before you change it. That way you can revert back quickly if you have broken something.

- Don’t make untested changes before leaving for the weekend or your staff and patrons will hate you.

*Don’t Laugh* people actually do this.
We moved the “loans” and its details to the top, and made it so the “reminder_message” doesn’t trigger first.
### Overdue Loans

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Author</th>
<th>Due Date</th>
<th>Fine</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weber and the transformation of nature / Julian Johnson.</td>
<td></td>
<td>Johnson, Julian.</td>
<td>07/05/2016</td>
<td></td>
<td>Valley Library</td>
</tr>
<tr>
<td>Anton Weber, an introduction to his works / by Walter Kolneder ; translated by Humphrey Searle.</td>
<td></td>
<td>Kolneder, Walter,</td>
<td>07/05/2016</td>
<td></td>
<td>Valley Library</td>
</tr>
<tr>
<td>Weber and the transformation of nature / Julian Johnson.</td>
<td></td>
<td>Bailey, Kathryn,</td>
<td>07/05/2016</td>
<td></td>
<td>Valley Library</td>
</tr>
</tbody>
</table>

If you have **outstanding fines or credits**, they are displayed below:

Valley Library: -146.25 USD  
Total: -146.25 USD

Please contact us for help or for more information. (541) 737-2538 or valley.circ@oregonstate.edu

Best regards,  
OSU Libraries Circulation (541) 737-2538 or valley.circ@oregonstate.edu
Dear Lori Hilterbrand,

Here's what you have checked out:

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>American idle : a journey through our sedentary culture / Mary Collins</td>
<td>11/05/2016</td>
</tr>
</tbody>
</table>

Best regards,

OSU Libraries Circulation (541) 737-2538 or valley.circ@oregonstate.edu
## Results!

Here's what you have checked out:

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Fine</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coloring locals : racial formation in Kate Chopin's Youth's companion stories / Bonnie James Shaker.</td>
<td>09/18/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The last years of Walker Evans : a first-hand account / by Jerry L. Thompson.</td>
<td>09/18/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feminist rhetorical practices : new horizons for rhetoric, composition, and literacy studies / Jacqueline Jones Royster and Cesa E. Kirsch ; with a Foreword by Patricia Bizzell.</td>
<td>01/09/2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Overdue Loans

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Author</th>
<th>Due Date</th>
<th>Fine</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transforming ethnomohistories : narrative, meaning, and community / edited by Sebastian Felix Braun ; afterword by Raymond J. DeMalle.</td>
<td>Default Author</td>
<td></td>
<td>11/21/2015</td>
<td></td>
<td>Valley Library</td>
</tr>
</tbody>
</table>
Additions are Easy

You can add any information that is available in the XML (the fields contained in the information the letter is created from).

To find out what’s available, hop into the “XML to Letter Admin” link. Here you can choose the letter your working on editing and have the XML contents emailed to you the next time it is triggered.

IMPORTANT: Use this option with caution. It is possible that this will suddenly send several thousand emails and impact system processing performance.
XML in all its GLORY

Try to trigger the letter to yourself as soon as possible and then turn the letter off in XML to Letter Admin.
No first name? No problem.

Save the XML dump to notepad, or if you have an XML editor like Oxygen you’re doing well!

Search for what you’re looking for – in this case I searched for “First” since I want the patron’s first name if it’s present.

```
<external_id>515</external_id>
<failed_authentication>0</failed_authentication>
<first_name>Hilary Dawn</first_name>
<force_password_change>false</force_password_change>
<force_update_external>false</force_update_external>
<force_update_external_original_fields>false</force_update_external_original_fields>
<from_register_new_user>false</from_register_new_user>
<gender></gender>
```
Find the path and put it in:

```xml
<xsl:for-each select="notification_data">
    <xsl:if test="receivers/receiver/user/first_name">
      <h3>Dear <xsl:value-of select="receivers/receiver/user/first_name"/>
           <xsl:value-of select="receivers/receiver/user/last_name"/>
      ,</h3>
    </xsl:if>
    <xsl:if test="not(receivers/receiver/user/first_name)">
      <h3>Dear Library Supporter,</h3>
    </xsl:if>
</xsl:for-each>

Hint: The last name will have the same path!
Remember, it’s more about attention to detail than innovation!
```
And Patron Moynihan can Disappear

Dear David Moynihan,

You have checked out the following item(s) at the Valley Library:

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<b>@@Questions@@</b>
Helpful Links From Smart People

• [https://bitbucket.org/ditlul/xsl-for-library-communications](https://bitbucket.org/ditlul/xsl-for-library-communications) (John Krug of Lancaster University)

• [https://docs.google.com/document/d/118i2kDlxMmjKU52B_teUN04CXW_xfRAoZyq1VQACio/edit?pref=2&pli=1](https://docs.google.com/document/d/118i2kDlxMmjKU52B_teUN04CXW_xfRAoZyq1VQACio/edit?pref=2&pli=1) (Nathan Mealy of PSU)

• [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Administration/050Configuring_General_Alama_Functions/070Configuring_Alama_Letters#Viewing_a_Letter.E2.80.99s_Source/XML](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Administration/050Configuring_General_Alama_Functions/070Configuring_Alama_Letters#Viewing_a_Letter.E2.80.99s_Source/XML) (Ex Libris Help Documents)