

I-SHARE ALMA PRIMO VE OFFICE HOURS WILL START SHORTLY



Welcome!

Office Hours will start at 2pm and run until 3pm

Please mute your microphone

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources





CARLI

UPDATE: LETTERS IN ALMA

Office Hours 3/26/2020

Agenda

- Letters- a refresher
- Update on consortially-managed Alma letters
- Overdue and Lost settings
- Basic letter customizations by CARLI Office
- Resources for letter customization
- AFN testing workflows



ALMA LETTERS



Alma Letters Overview

- Letters, what are they?
 - If it's printed or emailed, it's likely a Letter.
- The letters available in Alma:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/050Configuring_General_Alma_Functions/070Configuring_Alma_Letters#Letter_List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/070Configuring_Alma_Letters#Letter_List)



Alma Letters Overview

Slips that print:

- Due Date Slips
- Discharge Slips
- Hold Slip
- Fine/Fee Payment Receipt Slip
- And more!

Reports that occur:

- Fine/Fees Statement
- Patron Charged Items
- Patron Requests
- And more!

For a full list of the letters available in Alma:

<https://go.uillinois.edu/AlmaLetterList>

ALMA LETTERS UPDATE

Alma Configuration

University of Illinc

Filter List

Look-up or select

	Libraries	External Systems	General Configuration	Widgets
Acquisitions	Add a Library or Edit Library	Integration Profiles	Other Settings	Customized Widgets
Resources	Information	S/FTP definitions	Institution Languages	Primo Widget Search Fields
Discovery	Relationships	Allowed Emails	Country Names	Primo Widget Search
Fulfillment	Define Campuses	Allowed S/FTP connections	Home page Notifications	Precision
User Management	Locations	User Interface Settings	CRM Contacts	Network Groups
General	Remote Storage	Alma Logo and Color	Staff Login Report	Fulfillment Member
Analytics	Work Orders and Departments	Scheme	Institution Notifications	Institutions Relations
	Work Order Types	Social Login Labels	Validate ILS Migration Form	Security
	Work Order Departments	Identity Service Labels	Data Sharing Profile	IP Group Configuration
		Alma Viewer and Deposit	DARA Recommendations	Login Restriction
		Customization	Letters	Configuration
			Letters Configuration	Redirection Whitelist
			Components Configuration	

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ALMA LETTERS UPDATE

[Back to Alma](#) Alma Configuration

[Back to Alma](#) Alma Configuration

[Loan Status Notice](#)

Labels
Template
Letter Examples

[Customize All](#)
[Restore All](#)

Enabled	Code	Description
<input checked="" type="checkbox"/>	author	Author
<input checked="" type="checkbox"/>	department	Circulation Department
<input checked="" type="checkbox"/>	description	Description
<input checked="" type="checkbox"/>	letterName	Due Date Change
<input checked="" type="checkbox"/>	subject	Due Date Change for
<input checked="" type="checkbox"/>	library	Library
<input checked="" type="checkbox"/>	loans	Loans
<input checked="" type="checkbox"/>	new_due_date	Revised Due Date
<input checked="" type="checkbox"/>	Cc	None
<input checked="" type="checkbox"/>	Bcc	None
<input checked="" type="checkbox"/>	old_due_date	Old Due Date

Letter Preview

Send Example by Email

ExLibris

Due Date Change

03/25/2020

Dear Sir/Madam Woodruff

The recall that has been placed on your borrowed item has been cancelled. There is no change in its due date

Loans

Title	Description	Author	Old Due Date	Revised Due Date	Library
Essays on Bertrand Russell / edited by E.D. Klemke.		Klemke, E. D.	07/02/2020 22:00:00 CDT		Main Stacks

ALMA LETTERS UPDATE

< Back to Alma



Alma Configuration



< Loan Status Notice

Preview Letter

Cancel

Save

Labels

Template

Letter Examples

Restore

Managed in
Network:

No

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="header.xsl" />
<xsl:include href="senderReceiver.xsl" />
<xsl:include href="mailReason.xsl" />
<xsl:include href="footer.xsl" />
<xsl:include href="style.xsl" />

<xsl:template match="/">
  <html>
    <head>
      <xsl:call-template name="generalStyle" />
    </head>

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

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

      <br />
    </body>
  </html>
</xsl:template>
</xsl:stylesheet>
```

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Alma Letters Overview

Confirm

Are you sure you want to save and distribute all Network managed data to all members?

Distribution mode: Do not override member institution customization

Note: the Distribution mode for the template (XSL file) is non overwrite.

Cancel Confirm

1	<input type="checkbox"/>							
2	<input type="checkbox"/>							
3	<input checked="" type="checkbox"/>	call_number	Call Number					...
4	<input checked="" type="checkbox"/>	chron_i	Chronology I					...
5	<input checked="" type="checkbox"/>	chron_j	Chronology J					...
6	<input checked="" type="checkbox"/>	chron_k	Chronology K					...
7	<input checked="" type="checkbox"/>	chron_l	Chronology L					...
8	<input checked="" type="checkbox"/>	chron_m	Chronology M					...



Consortially Managed Letters

- Letters that will be managed consortially:
 - Letter 51 - Ful Resource Request Slip Letter
 - Letter 52 - Ful Transit Slip Letter
 - Letter 78 - On Hold Shelf Letter



Consortially Managed Letters

- Ful Resource Request Slip Letter
(currently letter #51 in configuration settings)
- Pick from Shelf List

THIS IS AN ALMA TEST

Process it in Alma, NOT in Voyager.
Questions? Contact support@carli.illinois.edu

Location: - Stacks

Call Number: T174.7 .N3731 2011

Item Barcode:

Nanotechnology and advances in medicine /
By: El Sayed Zaki, Maysaa.

Material Type: Book

Requested For: IShare

Destination: Benedictine University - Benedictine University Library

Request Type: Patron physical item request

Request ID: 5300000080000009

Patron ID at Item's Institution:

5300000060000009



Letter 51

THIS IS AN ALMA TEST

Process it in Alma, NOT in Voyager.

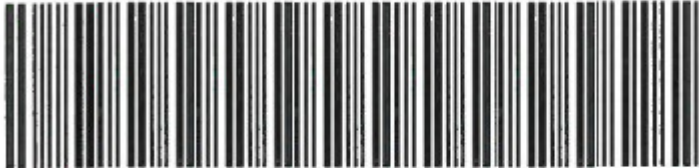
Consortially Managed Letters

- Ful Transit Slip Letter (currently letter #52)
- Transit Letter

THIS IS AN ALMA TEST
Process it in Alma, NOT in Voyager.
Questions? Contact support@carli.illinois.edu

To: **Benedictine University - Benedictine University Library**


Item Barcode:



3 0 0 0 0 0 0 0 0 0 0 0 4 0

Nanotechnology and advances in medicine /
By: El Sayed Zaki, Maysaa.

Owning Library: University of Illinois at Urbana-Champaign - Main Stacks



Letter 52

THIS IS AN ALMA TEST
Process it in Alma, NOT in Voyager.





Consortially Managed Letters

On Hold Shelf Letter

01/24/2020

Test, AFN NCC

College of DuPage Library
ILDS:COD
425 Fawell Blvd
Glen Ellyn
60137
United States

- Letter 78 - On Hold Shelf Letter
- “Item Available” letter sent directly to patrons

Dear Sir/Madam Test

The following item, which you requested on 11/21/2019, can be picked up at [North Central College (NCC) —Naperville, IL] - Oesterle Library - Information Services Desk Circulation Desk.

The item will be held for you until 02/07/2020.

Dog /
By: McHugh, Susan

Notes that may affect loan:

Sincerely
Circulation Department



Letters with Consortial Components

- Ful Overdue And Lost Loan Notification Letter
(currently letter #45)



Overdue and Lost Loans- in Voyager

- Recorded in Matrix entry for each patron group and item type combination.
- Options:
 - First Overdue Interval
 - Other Overdue Notice Interval
 - Other Overdue Notice Count
 - Lost Interval

Circulation Policy Matrix Record Settings

Patron Group: Item Type:

Settings

Intervals

Courtesy Notice Interval: daysMinimum Loan for Courtesy: daysFirst Overdue Interval: daysLost Interval: daysOther (Overdue) Notice Interval: daysOther (Overdue) Notice Count: Overdue Recall Notice Interval: daysOverdue Recall Notice Count: Hold Shelf Life:

Overdue and Lost Loan Rules- in Alma

- Rules determine:
 - When a patron receives overdue notice(s), and which version of the notice.
 - When item is converted to lost and the patron is fined.

< Overdue and Lost Loan Profile List Back View Overdue and Lost Loan Jobs

1 - 4 of 4 + Add Overdue and Lost Loan Profile ⌵ ⚙

Enabl	Name	Profile Type	Cre Over Loar Fine	Cre Overdu Notific Fee	Description	
1 <input checked="" type="checkbox"/>	I-Share 21 Day Overdue	Over... notifi... type 2	<input type="checkbox"/>		At 21 days past due date, the second overdue notice is generated. It states that the patron has been blocked and the problem item will go to lost status and will be billed to the patron's account in 14 additional days (lost applied on day 35).	⋮
2 <input checked="" type="checkbox"/>	I-Share 35 Day Lost	Chan... to lost	<input type="checkbox"/>		At 35 days past due date, the item is converted to lost. The patron is billed for item replacement. Patron block remains applied.	⋮
3 <input checked="" type="checkbox"/>	I-Share 7 Day Overdue	Over... notifi... type 1	<input type="checkbox"/>		At 7 days past due, the first overdue notice is generated. It states that the item is now 7 days overdue and the patron will be blocked in 14 days if the item not returned (block applied on day 21).	⋮

Letters with Consortial Components

- Letter 45 - Ful Overdue And Lost Loan Notification Letter
- IF statements
 - IF patron = I-Share AND Status = overdue THEN use overdue status Type 1
- Expect future updates as we refine the process



CARLI Customizations for Locally-Managed Letters

- Specific Letters
 - Letter 34 - Ful Hold Shelf Request Slip Letter
- Customizations to all Letters
 - Greeting
 - Date format
 - Letter reference



Library-Managed Letters & Local Edits

Alma Configuration

mailReason.xsl

Labels | **Template**

Customize All

Enabled	Code	Description	Managed in Network	Updated By	Last Updated	
<input checked="" type="checkbox"/>	dear	Dear Sir/Madam		-	-	...

Library-Managed Letters & Local Edits

[← Back to Alma](#)
⚙️ Alma Configuration
? ↻

← Ful Resource Request Slip Letter
Save and Distribute
Preview Letter
Cancel
Save

Enabled	Code	Description	Managed in Network	Updated By	Last Updated	
<input type="checkbox"/>	request_type	Request Type		-	-	⋮
<input checked="" type="checkbox"/>	requested_for	Requested For	✓	carli_bsw	02/14/2020	⋮
<input type="checkbox"/>	subject	Resource Request Slip		-	-	⋮
<input type="checkbox"/>	letterName	Resource Request Slip Letter		-	-	⋮
<input type="checkbox"/>	shelving_location_for_item	Shelving Location		-	-	⋮
<input type="checkbox"/>	system_notes	System Notes		-	-	⋮
<input type="checkbox"/>	tel	Tel	✓	carli_bsw	02/14/2020	⋮
<input type="checkbox"/>	manual_description_note	The following manual description I		-	-	⋮
<input type="checkbox"/>	shelving_locations_for_holding	The resource can be found at any c		-	-	⋮
<input type="checkbox"/>	addressFrom	Your.Department@organization.co		-	-	⋮
<input type="checkbox"/>	parsedIssueLevelDescription	parsed Issue Level Description		-	-	⋮

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Resources for Updating Letters in Alma

- Configuring Alma Letters
 - [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/050Configuring_General_Alma_Functions/070Configuring_Alma_Letters](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/070Configuring_Alma_Letters)
- Carli Web Page on Letter Configurations
 - Coming Soon



AFN TESTING WORKFLOW



Updates: AFN Testing Workflows

- How To: Testing the Automated Fulfillment Network (AFN)
https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_AFN
- Optional AFN testing sessions:
 - [Monday, April 6, 2020](#) - 3:30pm to 5:00pm
 - [Tuesday, April 7, 2020](#) - 8:00am to 9:30am
 - [Wednesday, April 8, 2020](#) - 10:00am to 11:30am
 - [Thursday, April 9, 2020](#) - 9:00am to 10:30am
 - [Friday, April 10, 2020](#) - 12:00pm to 1:30pm



Questions?



Thank you!

Join us next Thursday
at 2pm for another
Office Hour



You can always contact CARLI at support@carli.Illinois.edu

