

Configuring Rapido Letters

Note

If you want to configure display labels, see [Configuring Display Labels](#).

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

- General System Administrator
- Letter Administrator

Rapido 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 using a 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.

Rapido includes a list of letter types, where a single letter type can be used to send multiple letters that use the same structure. Rapido constructs a letter by combining dynamic XML fields generated by Rapido (data), labels (static text), and a template (formatting). The static labels and template (XSL style sheets) are included with Rapido 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 Rapido at the appropriate stage in a workflow. For example, Rapido 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.

For a video showing the entire letter configuration process in Rapido see [Letter Configuration](#).

For an overview of configuring Rapido letters watch the [Configuring Letters](#) video (5:38 minutes).

Accessing and Configuring Rapido Letters

All Rapido letters appear on the Letters Configuration page ([Configuration > General > Letters > Letters Configuration](#)).

Enabled	Letter	Description	Channel	Retention Period	Customized	Patron Facing	Updated By	Last Updated
<input checked="" type="checkbox"/>	Analytics Letter	Analytics Letter	EMAIL		✓		BRIA...	20/06/2016
<input checked="" type="checkbox"/>	Borrowed By Letter	Due Items	EMAIL		✓	✓	BRIA...	28/10/2015
<input checked="" type="checkbox"/>	Borrower Claim Email Letter	Borrower Claim Email Letter	EMAIL		✓	✓	COL...	21/07/2022
<input checked="" type="checkbox"/>	Borrower Overdue Email Letter (XSL Draft)	Borrower Overdue Email Letter	EMAIL		✓	✓	exLJ...	28/06/2023
<input checked="" type="checkbox"/>	Borrower Receive Email Letter	Borrower Receive Email Letter	EMAIL		✓	✓	exLJ...	15/06/2023

Letter Emails

You can view specific groups of letters by using the filters above the list of letters.

The screenshot shows the 'Letters Configuration' interface. At the top, there is a search bar with '1 - 2 of 2' items and a 'Restore letters' retention table button. Below the search bar, there are filters for 'Enabled' (set to 'Enable'), 'Patron Facing' (set to 'Yes'), 'Channel' (set to 'SMS'), and 'Customized' (set to 'No'). A table below lists two letter configurations:

Enabled	Letter	Description	Channel	Retention Period	Customized	Patron Facing	Updated By	Last Updated
<input checked="" type="checkbox"/>	Courtesy Letter	Sms Courtesy Notice	SMS	-	-	<input checked="" type="checkbox"/>	-	-
<input checked="" type="checkbox"/>	Delivery Registration Status Letter	SMS Delivery Registration Status Letter	SMS	-	-	<input checked="" type="checkbox"/>	-	-

The **Description** text is hard-coded and cannot be configured.

In addition, you can perform the following actions:

- [Enabling/disabling letters](#)
- [Setting retention periods](#)
- [Updating templates](#) to set the content and formatting for letters
- [Updating labels](#) (fields/strings of text that are used in the letter and can be translated)
- [Updating and Previewing Example Letters](#) for Testing
- [Contributing Letter Customizations to the Community Zone](#)

Note

You must assign the Letter Administrator role to users who can customize or maintain the email letters. For more information on assigning roles, see [Adding Roles to Users](#).

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](#)).

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 Rapido 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.

In the Letters list, you can restore the default retention period for all letters by selecting the **Restore letters’ retention table**.

Letter Retention.

Restore letters’ retention table

Using Labels to Update the Fields in the Letter

What are Letter Labels

Two kinds of data are used by the letter before it is sent to the patron, printer, etc: labels and XML data. Labels are static strings of text that you can update and translate. XML data is generated automatically by Rapido, and can be updated by configuring the XSL template (see [Customizing Letter Templates](#)).

You can use the labels to easily edit a letter without needing to edit the actual XSL template. For example, if you want the letter to state "Item Description" instead of just "Description", then you can change it in the labels:

Enabled	Code	Description	Translation
<input checked="" type="checkbox"/>	sincerely	Sincerely	Sincerely
<input checked="" type="checkbox"/>	title	Title	Title
<input checked="" type="checkbox"/>	message	We would like to remind you	We would like to remind you that the following items at your disposal are due shortly:

Preview

Dear Patron Smith

We would like to remind you that the following items at your disposal are due shortly:

Loans

Title	Description	Author	Due Date	Library
-------	-------------	--------	----------	---------

Label in letter

How to Configure Letter Labels

You can configure the labels for a specific letter as described below.

To configure letter labels:

1. Select **Edit** on the row action list of the letter.

Enabled	Letter	Description	Channel	Retention Period	Customized	Patron Facing	Updated by	Last Updated
<input checked="" type="checkbox"/>	Analytics Letter	Analytics Letter	EMAIL		✓		BRIA-	20/06/2016
<input checked="" type="checkbox"/>	Borrowed By Letter	Due Items	EMAIL		✓	✓	BRIA-	28/10/2015
<input checked="" type="checkbox"/>	Borrower Claim Email Letter	Borrower Claim Email Letter	EMAIL		✓	✓	COL-	2
<input checked="" type="checkbox"/>	Borrower Overdue Email Letter	Borrower Overdue Email Letter	EMAIL		✓	✓	COL-	2

2. Select the **Labels** button at the top of the page.

Borrowed By Letter

Labels Letter Examples Cancel Save

XSL Save Draft Remove Draft Restore ... X

Visual HTML Open in new tab

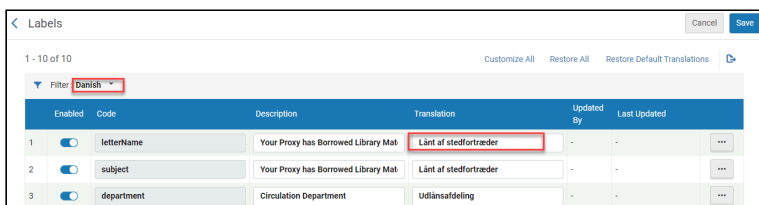
Language: English Width: 805px

3. Select **Customize** from the row actions menu. You can update the following:
 - **Enabled** — Use this toggle to activate/deactivate the label for usage in the letter.
 - **Description** — Update the label description that appears on the letter.

Note

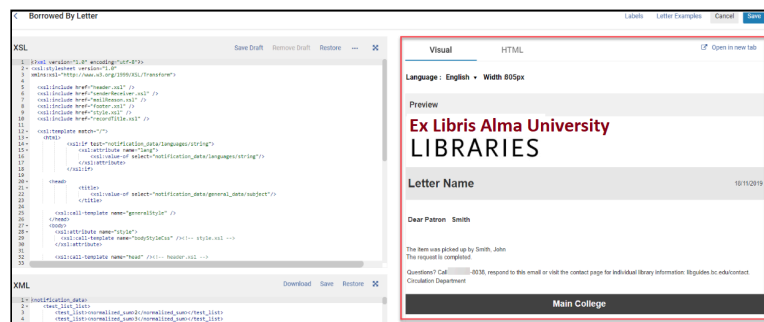
Note that using HTML tags in the Description field is not supported.

- **Translation** — If another language is enabled in Rapido and it is selected in the Filter drop down, you can edit the translation.



- **Restore** — If the line was modified, the **Enabled** and **Description** fields are restored to their default.
- **Restore Translation** — If another language is enabled in Rapido and its **Translation** label was modified, the field is restored to the default.

4. Select **Customize All** to edit all rows.
5. Select **Restore All** to restore all rows to their default.
6. Select **Restore Default Translations** to restore all translations.
7. When done, select **Save**.
8. You can view the changes in the letter preview pane.



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

Including Request ID in the Subject Label

Some letters can include the string `%reqId%` in the description column of the Subject label. This is 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

Customizing Email Addresses

- 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>`.
- The **addressFrom** label must be a valid email address.
- 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.

Using Templates to Update Letter Formatting and Content

Note

For information on configuring a resource sharing copyright declaration, see [Configuring a Resource Sharing Copyright Declaration](#).

In addition to editing labels (see [Configuring Letter Labels](#)) you can edit the template (XSL style sheet). The XSL template determines which fields and text appear in the letter and is used to format the letter. 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](#).

How to Customize Letter Templates

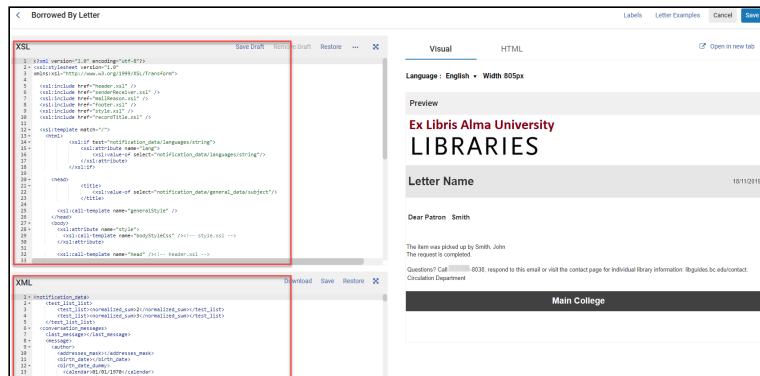
Ex Libris Support is available to assist with issues related to customized XSL stylesheets. However, their troubleshooting effort is within practical limits. If a style sheet is heavily customized, it may require time-consuming analysis to identify a specific error. Such validation cannot be provided 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. Select **Edit** on the row action list of the letter.

<input type="radio"/>	Borrowed By Letter	Due Items	EMAIL		✓	✓	BRIA...	28/10/2015	...
<input type="radio"/>	Borrower Claim Email Letter	Borrower Claim Email Letter	EMAIL		✓	✓	COL...	2	Edit Restore Activation
<input type="radio"/>	Borrower Overdue Email Letter	Borrower Overdue Email Letter	EMAIL		✓	✓	COL...	2	

The XSL and XML information appear to the left of the letter.

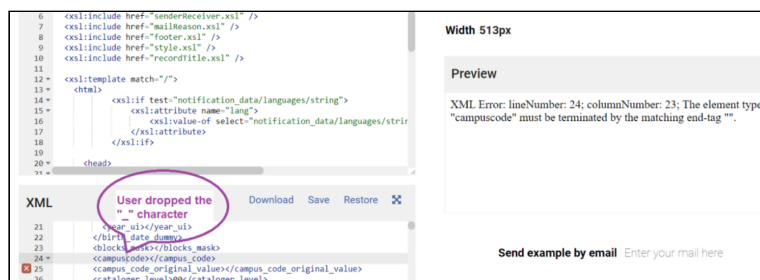


- To the right of the XML/XSL panes is a preview pane of the actual letter output.

Borrowed By Letter Preview.

Changes in the XSL/XML are immediately reflected in the preview pane.

Errors that are detected while editing the XSL/XML are marked with a red **X** on the relevant line.



Note

Note that Due to technical limitations, there might be a gap between the error line number reported on the XSL/XML and the line number reported on the Preview pane.

The editor also marks the XSL segments in color and implements auto-completion. Ctrl+f can be used to find items within the editor.

- You can use **Ctrl+Shift+f** to implement Prettyprint (convert and present the XSL source code with line breaks and indentations to make the code easier to read).
- You can maximize the XML/XSL windows using the full-screen icon.



- Update the labels associated with the letter (see [Using Labels](#)). Changes to the labels display in the preview pane.
- Select **Open in new tab** to open the preview in a separate browser tab and edit the HTML using accessibility plugins.
- Select **Visual** or **HTML** to toggle between a visual and HTML view.
- Select another language in the **Language** drop down to view the letter in a different language. The languages that

appear depend on the settings configured in Rapido.

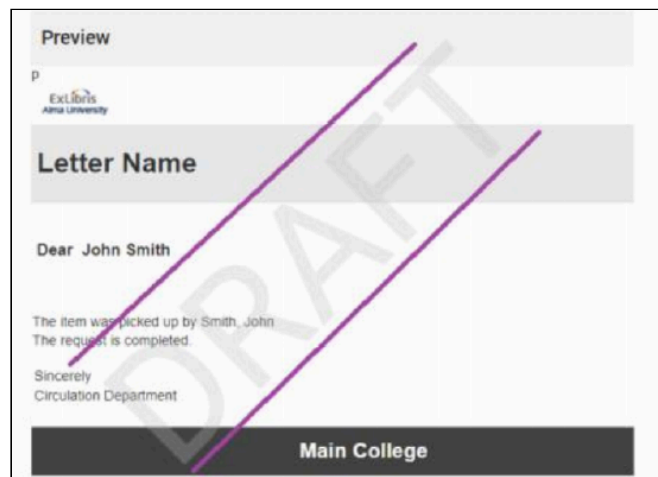
- Update the **Width** to visualize the output as it will be displayed in narrow screens or printers. Use px to configure the width in pixels, for example 500px.
- Reusable components display in the preview pane (see [Reusing Components Across Letters](#)).
- Select **Save Draft** to save your customizations as a draft. Changes done in the draft is not applied to the real letter. Select **Remove Draft** to erase the draft and display the last saved XSL. Select **Restore** to restore the XSL to its original state.

Draft options.

Note that while a draft is active, the **Edit Draft** and **Remove Draft** options are available in the row actions menu for the letter.

2.	<input checked="" type="checkbox"/> Borrowed By Letter (XSL Draft)	Due Items	EMAIL	<input type="text"/>	✓	✓	exl...	21/06/20...	⋮
3.	<input checked="" type="checkbox"/> Borrower Claim Email Letter	Borrower Claim Email Letter	EMAIL	<input type="text"/>	✓	✓	CO		Edit Draft
4.	<input checked="" type="checkbox"/> Borrower Overdue Email Letter	Borrower Overdue Email Letter	EMAIL	<input type="text"/>	✓	✓	CO		Remove Draft

The draft watermark displays in the preview pane.



- Select **Save** to apply the changes to the real letter. This removes the draft (if one exists for this letter). Note that after saving, the letter remains in the preview window. To return to the full list of letters, select **Cancel**.
- To send an example by email, add an address to the **Send example by email** field and select **Send**.
- You can view examples of letters by selecting **Letter Examples**. In the Letter Examples page you can add examples of letters that were sent by Esploro and upload new examples. See [Updating and Previewing Example Letters for Testing](#).

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 re-saving it) for the new information to be included in the letter.

General Examples of XSL Customizations

The following examples show what you can do with XSL to customize the output of your letters. For examples of specific letters see [Example of Query to Patron Letter Customization](#) and [Example of Borrowing Activity Letter Customization](#).

Output Last Four Digits of a Code

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

```
<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 Condition for Notes that Can Affect Loan

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:

```
<xsl:if test="notification_data/request/system_notes !=''">  
<tr>  
<td><b>@@notes_affect_loan@@:</b></td>  
</tr>  
<tr>  
<td><xsl:value-of select="notification_data/request/system_notes"/></td>  
</tr>
```

Include Phone Number in All Letters Using this Template

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.

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

Include Template Name as Hidden Text

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

```
<html> <xsl:attribute name="data-filename"> <xsl:value-of select="/notification_data/  
general_data/letter_type"/> </xsl:attribute>
```

The output will include something like:

```
<html data-filename="FulLoanReceiptLetter"> ...
```

Remove an Element from a Letter

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

```
<th>@@title@@</th>
<!--<th>@@description@@</th>-->
<th>@@author@@</th>
<th>@@due_date@@</th>
<th>@@fine@@</th>
<th>@@library@@</th>
```

The output table displays without the description column.

Suppress Letters to Users in Specific Group

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:

```
<table cellpadding="5" cellspacing="0" border="0">
<tr><td><xsl:for-each select="notification_data">
<xsl:if test="user_for_printing/user_group='STUDENT_GRADUATE'">
<xsl:message terminate="yes">user group is STUDENT_GRADUATE
</xsl:message></xsl:if></xsl:for-each></td></tr>
</table>
```

- And below this line:

```
<xsl:template match="/">
```

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](#).

Example of Query to Patron Letter Customization

You can use the enhanced XSL Query to Patron letter to configure alternative versions of query letters that can be sent to patrons when library staff have questions about a particular resource-sharing borrowing request. For general examples of what you can do with XSL to customize the output of your letters, see [General Examples of XSL Customizations](#).

You can define up to 30 versions of the letter, for example, one for a question about the requested item and another for a query about how to handle a problem that has arisen with regard to a request (see [Configuring Patron Query Types](#)).

Once the patron query types are configured, 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, as follows:
 1. Add a borrowing request for an inventory item (make yourself the **Requester**; see [Adding a Resource Sharing Borrowing Task From a Search](#)).
 2. On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), in the row actions of the new request, select **Send query to patron** (see [Managing Resource Sharing Borrowing Requests](#)).
 3. Under **Email template**, select the letter to send, and then select **Send Email** to send it.
 4. Edit the Query to Patron letter (Edit from the row actions menu).
 5. Select the **Letter Examples** button.
 6. Select the **Add from System Letters** button.
 7. Select the letter that was sent.
 8. In the Letter Examples page make this letter the **Default Preview**.
 9. In the XML preview pane, you now see the new letter.
 10. Select **Download** to save the XML letter to a file, such as `letter.xml`.
3. Modify the labels:
 1. On the Letters Configuration page (**Configuration > General > Letters > Letters Configuration**), locate the Query to Patron letter and open it for editing.
 2. Select the **Labels** button.

Enabled	Code	Description	Translation	Updated By	Last Updated	
<input checked="" type="checkbox"/>	additional_person_name	Additional Person Name	Additional Person Name	-	-	...
<input checked="" type="checkbox"/>	article_or_chapter_title	Article\Chapter Title	Article\Chapter Title	-	-	...
<input checked="" type="checkbox"/>	author	Author	Author	-	-	...
<input checked="" type="checkbox"/>	author_initials	Author Initials	Author Initials	-	-	...
<input checked="" type="checkbox"/>	call_number	Call Number	Call Number	-	-	...
<input checked="" type="checkbox"/>	chapter	Chapter	Chapter	-	-	...

Entries whose **Codes** begin with **Type_xx** (**Type_1**, **Type_2**, **Type_3**, and so forth) are only included in the versions of the Query to Patron letter whose patron query types correspond with those numbers (see [Configuring Patron Query Types](#)). For example, the **Codes** of the entries that are only included in the **Type_1_query_name** version of the query letter begin with **Type_1** (e.g., **Type_1_header**, **Type_1_subject**).

3. For each of the entries that are specific to the enabled patron query types, in the row actions, select **Customize**, and then enter the appropriate text in the **Description** column.

Enabled	Code	Description	Translation	Updated By	Last Updated	
<input type="checkbox"/>	Type_22_query_line_1	[Please enter your query here]	[Please enter your query here]	-	-	...
<input type="checkbox"/>	Type_22_query_line_2	[Please enter your query here]	[Please enter your query here]	-	-	...
<input checked="" type="checkbox"/>	Type_22_query_line_3	Please provide publication inform	[Please enter your query here]	-	-	...
<input type="checkbox"/>	Type_23_query_line_1	[Please enter your query here]	[Please enter your query here]	-	-	...
<input type="checkbox"/>	Type_23_query_line_2	[Please enter your query here]	[Please enter your query here]	-	-	...

4. Select **Save**.

4. Modify the XSL:

1. In the **Xsl** pane, modify the relevant XSL to change the format of your letter. The same XSL file is used to format all of the versions of the Query to Patron letter. You can add labels or fields from the XML, use the values of these fields to define conditions, and so forth.
2. For example, a conditional clause looks something like:

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

Note

The default template only includes rules for patron query types 1 and 2. If your system has more than two types defined, you must add rules for the additional types to the template before you can configure them. You can do this by copying one of the existing rules and modifying the copy as required for each additional rule.

3. Select **Save** (or **Save Draft** as described in [How to Customize Letter Templates](#)).
5. To test your changes, upload the XML (`letter.xml`) as described in [Updating and Previewing Example Letters for Testing](#).

Working with User Preferred 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"/>
```

Reusing Components Across Letters

You can reuse components such as headers and footers across letters.

Updating and Previewing Example Letters for Testing

Overview of Letter Templates

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 (see [How to download letters as XML files](#)). As an example, here is part of the XML output used to generate a Query to Patron letter.

```
<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>
      <entity_action></entity_action>
      <library_id>12900830000541</library_id>
      <library_unit_id></library_unit_id>
      <line1>library 2</line1>
      <line2></line2>
      <line3></line3>
      <line4></line4>
      <line5></line5>
    </note></note>
    <originating_id></originating_id>
    <postal_code>36500</postal_code>
    <preferred>true</preferred>
    <segment_types_display>
      <string>Billing</string>
      <string>Patron Communications</string>
      <string>Primary</string>
      <string>Shipping</string>
    </segment_types_display>
```

```

<state_province>IL</state_province>
<user_address_types_display></user_address_types_display>
</address>
<automatic_creation>>false</automatic_creation>
<automatically_activate_locate_profile>>false</automatically_activate_locate_profile>
<automatically_locate_resource>>true</automatically_locate_resource>
<bibliographic_titles></bibliographic_titles>
<cancel_request_on_locate_failure>>true</cancel_request_on_locate_failure>
<code>RES_SHARE</code>
<code_rfid></code_rfid>
<create_date></create_date>
<default_acq_loctaion_id></default_acq_loctaion_id>
<default_item_loctaion_id>12900870000541</default_item_loctaion_id>
<default_move_loctaion_id>12900850000541</default_move_loctaion_id>
<default_pickup_loctaion_id>12900830000541</default_pickup_loctaion_id>
<default_printer></default_printer>
<description>Temporarily manages inventory that is sent to or received from resource
sharing partners</description>
<digital_objects></digital_objects>
<digital_storage_size></digital_storage_size>
<disable_call_number_calculation>>false</disable_call_number_calculation>
<edi_code></edi_code>
<edi_type></edi_type>
<email>
<create_date>03/31/2013</create_date>
<description></description>
<email>nosuchmail@no.such.mail.com</email>
<entity_action></entity_action>
<external_id></external_id>
<library_id>12900830000541</library_id>
<library_unit_id></library_unit_id>
<originating_id></originating_id>
<preferred>>true</preferred>
</email>
<entity_action></entity_action>
<ignore_electronic>>false</ignore_electronic>
<itemless_library></itemless_library>
<leader_institution_id></leader_institution_id>
<library_id>12900830000541</library_id>
...

```

Using Example Letters for Testing

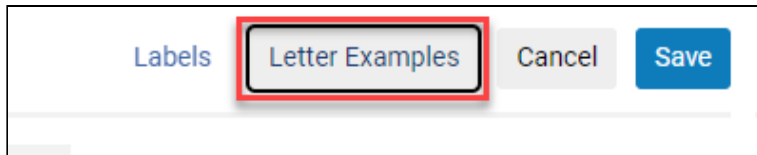
On the **Letter Examples** tab, you can use the available XML examples to preview letters and test changes.

Note

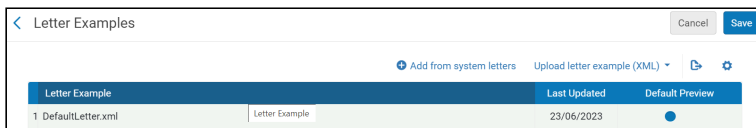
Any identifying information should be removed from these examples.

How to Access the Letter Examples:

1. Navigate to **Configuration > General > Letters Configuration**.
2. Select **Edit** in the row actions menu for the relevant letter.
3. Select the **Letter Examples** button.



4. There is always one default letter that appears, but you can add more examples as described below.



Note

The letter that is selected in the **Default Preview** column is the one that appears in the preview pane when editing a letter.

How to add existing letters that were generated in your institution:

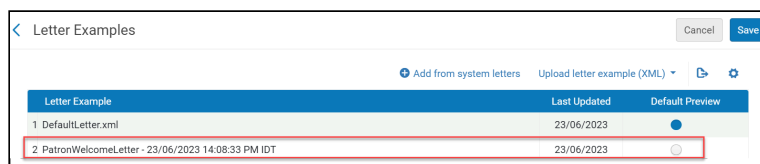
1. In the Letter Examples page, select the **Add from system letters** button.



2. The Sent Letters page appears, showing up to 10 of the most recent XMLs from the last seven days.
3. Select the letter to add.

Sent_letters.

4. The selected letter appears in the Letter Examples page.

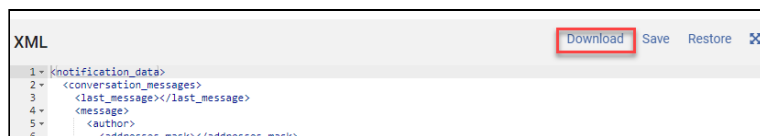


Note

The added letter is not marked for default preview unless you select it in the **Default Preview** column.

How to download letters as XML files:

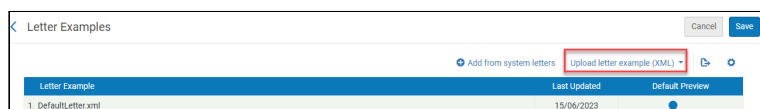
1. In the Letters Configuration page, for the relevant letter select **Edit** in the row actions menu.
2. In the XML pane, select the **Download** button.



3. Edit the file in an XML editor to make any relevant changes.

How to add letters that were downloaded as XML files:

1. In the Letter Examples page select the **Upload letter example (XML)** button.



2. Browse to and select the XML file and select **Upload**.
3. The added letter is not marked for default preview unless you select it in the **Default Preview** column.

Note

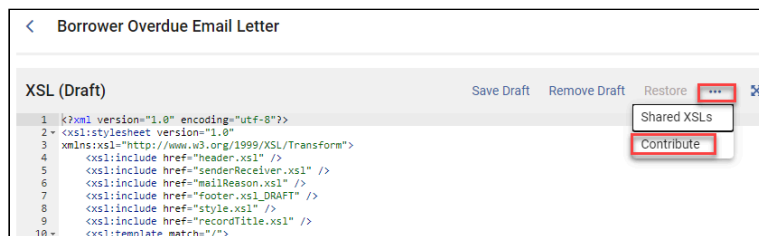
These examples are subject to the retention policy of the institution. The XML files saved in the system are retained for seven days and are removed by the weekly cleanup job. The XML examples added to the XML list from the system are persistent and are not cleaned by the weekly job. Any identifying information must be removed from these examples.

Contributing Letter Customizations to the 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. You can also preview how a template will work and look before copying it. This makes it much easier to share XSL templates between institutions.

To contribute XSL templates to the Community Zone:

1. Access the letter you want to contribute to the Community Zone from the Letter Configuration page (**Configuration > General > Letters > Letter Configuration**).
2. Select the ... icon in the XSL pane and then select **Contribute**.



3. 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.

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 phone number.

Contribute

You are about to contribute the following to the community :

Letter Name: Borrower Overdue Email Letter

Description:

Contact: patron@exlibris.com

Ex Libris Alma University

LIBRARIES

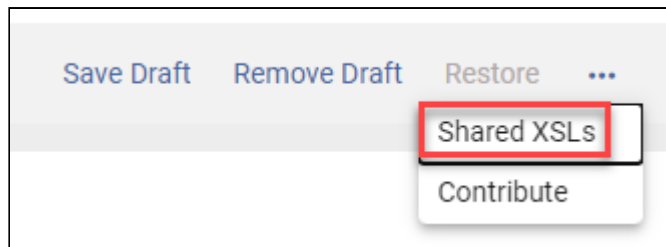
Letter Name 18/11/2019

We regret to inform you that your resource sharing request item is overdue. Original due date: .
Please return the item as soon as possible.

Request information:
Request ID:
Title:

Are you sure you want to continue?

4. Select **Confirm**. The XSL template is contributed to the Community Zone.
5. 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. Select **Confirm** to re-contribute.
6. You can view contributed letters by selecting the ... icon in the XSL pane, and then selecting the **Shared XSLs** option.



In the row actions menu for the relevant letter, select the **Preview** option to view the letter.

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

To copy a contributed XSL template to your institution:

1. Access the letter you want to copy from the **Letter Configuration** page ([Configuration > General > Letters > Letter Configuration](#)).
2. In the XSL pane select the ... icon and then **Shared XSLs**. This displays all of the XSL versions contributed by multiple institutions.
3. Select the relevant letter to copy to your institution and then use the **Select** button to add it.

Contributed XSLs		<input type="button" value="Cancel"/> <input type="button" value="Select"/>
1 - 1 of 1		
Description	Contact	
1 <input checked="" type="radio"/> New letter with updated text	patron@exlibris.com	...

The selected version now displays in the preview window.

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

Configuring Outgoing Email

Rapido 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).

Note

Library-specific patron letters/emails can have a specific 'From' address. This allows patrons to reply back to the appropriate library.

Watch the [Add a 'Reply' to Email Address for Library Specific Letters](#) video (1:45 minutes).

-
- **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 mail 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.) If not configured, Ex Libris uses the default email address rapido@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:

- Borrower Overdue Email Letter
- Externally Obtained Letter
- Ful Cancel Email Letter
- Ful Damaged Email Letter
- Ful Lost Email Letter
- Ful Outgoing Email Letter
- Ful Renew Email Letter
- Lending Recall Email Letter
- Query To Patron Letter
- Borrower Receive Email Letter
- Borrower Return Email Letter
- General mail Letter
- Lender Email Letter
- Resource Sharing Return Slip Letter
- Interested In Letter
- ARTEmail message

- OrderListLetter (if any of the library's email addresses are of type 'Order response')

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 rapido@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.

Instead of configuring **EnvelopeFrom**, you can instead use the mail handling integration profile to have Rapido 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 > General > External Systems > Integration Profiles](#)), select **Add Integration Profile**. Rapido enables 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.

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.

5. If you want to continue using Rapido'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.
If you want, instead, that the **EnvelopeFrom** of each email outgoing from the institution mail relay must be the same as the **From:** address of that email message, select **Use the 'From address' header**.

Note

Do not use this feature, as it is currently not operational. Instead, see setting the **From** address on [Configuring Institution/Library Contact Information](#).

5. 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**.

After creating the mail handling integration profile, users are able to test the email configuration. When executed, an email is sent to the preferred email of the logged-in user. Testing the configuration is accessed by: **Configuration > General > External Systems > Integration Profiles**. Locate the **Mail Handling** profile and select **Edit** from the row actions. Select the **Actions** tab, in the Mail Handling Definitions section, enter the email address, and select **Save and**

Test.

The screenshot shows the 'Integration Profile' configuration page for 'Mail Handling'. At the top right, there are three buttons: 'Save and Test' (highlighted with a red box and an arrow), 'Cancel', and 'Save'. Below this is a header section with 'Name' and 'Mail Handling'. Underneath, there are fields for 'Code' (MAIL_HANDLING) and 'Integration Type' (Mail Handling). There are two tabs: 'General Information' and 'Actions'. The 'MAIL HANDLING DEFINITIONS' section is highlighted with a red box and contains:

- 'Active' with a checked checkbox.
- Two radio buttons: 'Send directly from Ex Libris' (selected) and 'Send using institution mail relay'.
- 'SMTP EnvelopeFrom address' field with the value 'notices@alma.edu'.

Mail Handling Integration Profile

Letter List

The following table lists the letters available in Rapido.

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

- The **Translation Eligible** column corresponds to the **Patron Facing** column in the Rapido 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.

Peer to Peer Email Partner Letters

The table below lists letters that are used by Rapido to send messages to peer email partners.

What are Letter Labels	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
Borrower Claim Email Letter	For peer-to-peer partners, the letter is sent when the Automatic Claim field is enabled on the borrowing request and the value of the Time to Claim (days) is reached. See Resource Sharing Partners .	Resource sharing	Email	Yes
Borrower Overdue Email Letter	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.	Resource sharing	Email	Yes
Borrower Receive Email Letter	Sent to the lending institution when the loaned item has been received at the borrowing institution.	Resource sharing	Email	Yes
Borrower Return Email Letter	Sent to the lending institution when the borrowing institution has returned the loaned item.	Resource sharing	Email	Yes
Ful Cancel	Indicates that a resource sharing request has been canceled. Sent to	Fulfillment	Email	Yes

What are Letter Labels	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
Email Letter	partners automatically when a resource sharing borrowing request is sent to a partner whose Type = Email . See Managing Resource Sharing Borrowing Requests .			
Ful Damaged Email Letter	Sent to the lending partner to notify them that a resource sharing item has been damaged. See Managing Resource Sharing Borrowing Requests .	Resource sharing	Email	No
Ful Lost Email Letter	Sent to the lending partner to notify them that a resource sharing item has been lost. See Managing Resource Sharing Borrowing Requests .	Resource sharing	Email	No
Ful Outgoing Email Letter	The borrowing request sent to a partner with profile type Email.	Resource sharing	Email	Yes
Ful Renew Email Letter	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 .	Resource sharing	Email	Yes
General Message Email Letter	An email sent to the resource sharing partner to alert them of a new general message that has been entered on the request.	Resource sharing	Email	Yes
ILL Email to User	Manually sent from the User Details page. <hr/> Note This letter cannot be customized. <hr/>	User management	Email	No
Lender Checked-In Email Letter	Sent to the borrowing partner when an item was checked in at the lending institution.	Resource sharing	Email	Yes
Lender Reject Email Letter	Sent to the borrowing partner when the lending partner has rejected a lending request.	Resource sharing	Email	Yes
Lender Renew Response Email Letter	Sent to the borrowing partner when the lending partner responds to a renewal request.	Resource sharing	Email	Yes
Lender Ship Email Letter	Sent to the borrowing partner to indicate that the requested item has been shipped.	Resource sharing	Email	Yes
Lender Will Supply Email Letter	Sent to the borrowing partner when the status of a resource sharing request changes to Will Supply .	Resource sharing	Email	Yes
Lending Recall Email Letter	Sent to the borrowing partner when an item is recalled and must be returned.	Resource sharing	Email	Yes

Patron Letters

The table below list letters that are sent by Rapido to the patrons' email addresses.

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
Borrowing Activity Letter	<p>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 in the letter, and a flag is added to the XML - <code><loans_over_the_limit>true</loans_over_the_limit></code>. Sent either by a job or by request, for example, the Renew Selected and Renew All actions on the Loans tab of the Patron Services page.</p> <p>This letter can be activated to trigger a webhook function. See Webhooks.</p>	Fulfillment	Email SMS Webhook	Email - Yes SMS - Yes Webhook - No
Cancel Request Letter	<p>An SMS message sent to patrons indicating the reason for the request cancellation. For more information, see the email format for Cancel Request Letter.</p> <hr/> <p>Note</p> <p>If the date by which the request is needed has passed, this letter is no longer sent.</p> <hr/>	Fulfillment	SMS	Yes
Change Rapido Request Terms Letter	<p>A letter that will notify the patron if the terms that were defined by the previous lender were changed when the request is moved to a new lender.</p> <p>For a full list of letters used by Rapido, see Rapido Letters.</p>	Rapido	Email	Yes
Document Delivery Notification Letter	<p>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 Attaching Digitized Items To Be Sent To a Patron.</p> <pre> <xsl:if test="notification_data/download_url_saml != ''"> <tr> <td>@@for_saml_users@@<a> <xsl:attribute name="href"> <xsl:value-of select="notification_data/download_url_ saml" /> </xsl:attribute>@@click_here@@ </td> </tr> </xsl:if> </pre>	Fulfillment	Email	Yes
Externally Obtained Email Letter	<p>Sent to patrons; contains a URL for a requested article obtained through the CCC GetItNow service.</p> <p>See Adding a Request For a CCC GetItNow Resource.</p>	Resource sharing	Email	Yes
Ful Borrowing	<p>Sent to patrons; indicates whether a loaned resource sharing item was successfully renewed.</p>	Fulfillment	Email	Yes

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
Info Letter	See Managing Resource Sharing Borrowing Requests .			
Ful Digitization Notification Item Letter	<p>Sent to a patron who asked for material to be digitized with a send method of Attach Documents - attachment. The letter informs the patron that the digitization request has been completed and informs the patron where the digital material can be viewed. For details on configuring digitization departments for processing digitization requests.</p> <p>If Rapido automatically attempted to add the file to a citation, the email also includes the status of that attempt.</p> <p>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.</p> <pre> <tr> <td>@@reading_list_name@@: <xsl:value-of select="notification_data/request/reading_list_name"/> </td> </tr> <tr> <td>@@citation_id@@: <xsl:value-of select="notification_data/request/reading_list_ citation_id"/> </td> </tr> <tr> <td>@@request_creator@@: <xsl:value-of select="notification_data/request/request_creator"/> </td> </tr> </pre>	Fulfillment	Email	Yes
On Hold Shelf Letter	<p>Sent to patrons; indicates that an item is ready for pickup at the hold shelf.</p> <p>This letter can be activated to trigger a webhook function. See Webhooks.</p>	Fulfillment	Email SMS Webhook	Email - Yes SMS - Yes Webhook - No
Patron Welcome Letter	<p>This letter is sent when adding a patron role to a user, whether manually, through a job, or via SIS. The letter is not sent when the patron role is added through a merge or migration.</p> <p>If you do not want to 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 prevents sending the letter in this case. The XML for the letter includes an indicator if the role was added by a linked account. This indication can be used to stop the</p>	User management	Email	Yes

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
	letter from sending the document, How to configure a letter to not be sent under certain circumstances , shows an example of how this can be done.			
Query to Patron Letter	<p>Sent to patrons when the user selects Send query to patron from a resource-sharing borrowing request. See Managing Resource Sharing Borrowing Requests.</p> <p>This letter is only used when the institution is using patron query types; see Configuring Patron Queries.</p> <p>To configure, see Example of Letter Customization: The Query to Patron Letter.</p>	Resource sharing	Email	Yes
Resource Sharing Request Confirmation Letter	When configured (Configuration > General > Letters > Letters Configuration > Resource Sharing Request Confirmation Letter), Rapido now sends a confirmation email when a request is placed. This letter is disabled by default.	Resource sharing		
Reset Password Letter	Sent from various workflows, and includes a link to a page that enables the recipient to change (or create) his or her password.	User management	Email	Yes
Social Login Account Attached Letter	Sent after attaching a user account to a social logic provider. For library staff, the email includes a link that can be used to quickly log in to Rapido.	User management	Email	Yes
Social Login Invite Letter	An email sent to staff users inviting them to use social network logins instead of the standard Rapido login.	User management	Email	Yes

Internal Staff Resource Sharing Letters

The table below lists letters that are printed by resource sharing staff in Rapido at different points in the resource sharing request workflow.

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
Ful Hold Shelf Request Slip Letter	<p>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.</p> <p>By default, the letter has the same attributes as the Pickup Print Slip Report Letter, but it can be configured as needed.</p>	Fulfillment	Email	No

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
	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.			
Ful Incoming Slip Letter	<p>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. You may include a printable barcode image on this letter.</p> <hr/> <p>Note</p> <p><i>Ful Incoming Slip Letter and Resource Sharing Shipping Slip Letter both use the same Print Slip button in Rapido</i></p> <hr/>	Resource sharing	Email	No
General Assign To Letter	<p>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:</p> <ul style="list-style-type: none"> • when a staff user assigns a cataloging record to another user • when a staff user assigns an electronic resource activation task. 	User management	Email	No
Lending Requests Report Slip Letter	<p>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.</p> <p>For more information see Managing Resource Sharing Lending Requests.</p>	Resource sharing	Email	Yes
Resource Sharing Receive Slip Letter	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.	Resource sharing	Email	Yes
Resource Sharing Return Slip Letter	<p>Printable when returning a borrowing item to the lender. You may include a printable barcode image on this letter. Printing the letter occurs if:</p> <ul style="list-style-type: none"> • Scanning in an item triggers a return (including Return Items menu option) • Using the Return option in the task list (see Workflow Actions). <p>The letter is not relevant for NCIP transactions.</p>	Resource sharing	Email	Yes
Resource Sharing Shipping Slip Letter	<p>Sent to a user when the user selects the Ship Item 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.</p> <p>See Shipping Items.</p> <hr/> <p>Note</p> <ul style="list-style-type: none"> • For this letter, a shipping address must be defined in the contact <hr/>	Resource sharing	Email	No

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
	<p>information of the Resource Sharing Partner (Fulfillment > Resource Sharing > Partners > [Edit] > Contact Information > Addresses). See Resource Sharing Partners.</p> <ul style="list-style-type: none"> • <i>Ful Incoming Slip Letter</i> and <i>Resource Sharing Shipping Slip Letter</i> both use the same Print Slip button in Rapido and Rapido. 			

Internal Staff Administrative Letters

The table below lists administrative letters that are sent out as part of configuration or other administrative actions.

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
Analytics Letter	Contains an analytics report that is sent to report subscribers.	Analytics	Email	No
Rapido Request New Resource Sharing Partnership Letter	This letter is used to contact an identified partner within the directory from the Find Partner workflow, using the Send Rapido Request action, to begin the process of adding the potential partner as a new partner.	Resource sharing	Email	Yes
SAML Certificate Expiration Notification Letter	<p>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.</p> <p>Sent approximately 60 days and 30 days before expiration.</p>	Administration	Email	No
Send Rapido Request Letter	Rapido sends a request to a potential lender for a new resource sharing partnership. For more information about Rapido letter, see Send Rapido Request Letter	Administration	Email	No
Social Login Account Attached Letter	Sent after attaching a user account to a social logic provider. For library staff, the email includes a link that can be used to quickly log in to Rapido.	User management	Email	Yes
System Job Letter	Sent when jobs initiated in Rapido start and complete (letter is sent to the user who initiated the job). For details on configuring Rapido jobs (processes), see Managing Jobs .	Administration	Email	No

Letter Name	Letter Description	Category	Channel	Translation Eligible ('Patron Facing' flag in Rapido)
User Notifications Letter	Sent to users using the Update/Notify Users job . For more information, see Configuring User Notification Types .	User management	Email	Yes
User Registration Letter	Not in use	User management	Email	No