<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Alma base URL&gt;</td>
<td>The base URL to connect to Alma, not including the path of any specific page. This URL is provided to your Alma administrator by Ex Libris. See <a href="#">Your Alma Domain Names</a>.</td>
</tr>
<tr>
<td>Access provider</td>
<td>The party that provides access to electronic goods or services; may or may not be the vendor that sells the access.</td>
</tr>
<tr>
<td>Access rights</td>
<td>The area in Fulfillment configuration where permissions are granted to patrons that allow them to access digital and electronic resources. See <a href="#">Configuring Inventory Management Groups</a>.</td>
</tr>
<tr>
<td>Acquisitions Libraries</td>
<td>There are no 'Order Units' in Alma, only 'Libraries'. Aleph Order Units have been condensed and mapped into a list of Acquisitions 'Libraries' in Alma.</td>
</tr>
<tr>
<td>Activation</td>
<td>The process of enabling access to e-resources for patrons. Includes confirming that the library has access to the resource and setting up technical information so that patrons have access. See <a href="#">Activating Electronic Resources</a>.</td>
</tr>
<tr>
<td>Aggregator package</td>
<td>A type of electronic collection that includes all titles (as opposed to a selective package, which includes only some of the collection's titles). See <a href="#">Adding a Local Electronic Collection</a>.</td>
</tr>
<tr>
<td>All titles (search)</td>
<td>When searching &quot;All titles,&quot; that really means &quot;All records,&quot; i.e. you're searching all indexed fields in all records, so you can enter an ISBN or other metadata in that basic search box.</td>
</tr>
<tr>
<td>Allocated balance</td>
<td>The total amount of money initially available for the fund. This amount doesn't change when expenditures are made or encumbrances assigned to the fund; the available balance changes. You can increase a fund's allocated balance by adding money to the fund. See <a href="#">Fund Transaction Terminology</a>.</td>
</tr>
<tr>
<td>Allocated fund</td>
<td>A representation of an actual budget used for purchasing. See <a href="#">fund</a>, and also see <a href="#">Fund Transaction Terminology</a>.</td>
</tr>
<tr>
<td>Alma Link Resolver</td>
<td>Alma component that responds to external requests with a menu of physical, electronic, and digital services. For physical resources, requests are offered; for electronic resources, context-sensitive links are provided; for digital resources, direct links to the digital object are provided. The Alma Link Resolver responds to OpenURL requests as well as requests from systems such as Primo. For more information, see the training video <a href="#">Alma Link Resolver</a>.</td>
</tr>
<tr>
<td>Alma Viewer</td>
<td>An Alma tool for viewing digital representation files. See <a href="#">The Alma Viewer</a>.</td>
</tr>
<tr>
<td>Alma-P</td>
<td>Delivery categories for Primo for physical, electronic, digital, and digital collection resources. See <a href="#">Delivery Settings for Local Primo Records Harvested from Alma</a>.</td>
</tr>
<tr>
<td>Alma-E</td>
<td></td>
</tr>
<tr>
<td>Alma-D</td>
<td></td>
</tr>
<tr>
<td>Alma-C</td>
<td></td>
</tr>
<tr>
<td>Analysis</td>
<td>The querying option within Analytics that allows a user to create a report.</td>
</tr>
<tr>
<td>Analytics</td>
<td>Alma component used to manage data reports and the dashboard. See <a href="#">Introduction to Analytics and Terminology</a>.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
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</tr>
<tr>
<td>Available balance</td>
<td>The money that is available for use in an allocated fund. [Available balance] = [allocated balance] - [(encumbrances - disencumbrances)] - [expenditures]. See <a href="#">Fund Transaction Terminology</a>.</td>
</tr>
<tr>
<td>Borrowing request</td>
<td>A resource sharing request placed by local patron and fulfilled by another institution’s resource. Otherwise known as a resource sharing outgoing request. See <a href="#">Requests in Alma</a>.</td>
</tr>
<tr>
<td>Brief level</td>
<td>A record's brief level (1 to 10) reflects the amount and quality of bibliographic information. A brief record is one that Alma considers to have a less than ideal amount of information. Level 10, intuitively enough, indicates the most complete records – the LEAST brief. See also: <a href="#">Brief record</a>.</td>
</tr>
<tr>
<td>Brief record</td>
<td>Users can define rules that set the brief level of a record based on how much information is present in certain fields of the record. A lower number is more brief; a brief level of 10 is a full record. In addition, an administrator can set the brief level threshold from 0 to 9; any record whose brief level is below the threshold is considered to be brief. See also: <a href="#">Brief level</a>.</td>
</tr>
<tr>
<td>Bursar Transaction ID</td>
<td>A unique ID sent to the bursar system together with fines and fees, in order to enable the bursar system to let Alma know when a fine or fee is paid. See <a href="#">Configuring Transaction IDs</a>.</td>
</tr>
<tr>
<td>Campus</td>
<td>A collection of buildings that belongs to a given institution. Patrons may be affiliated with a specific campus where they can request library services. Libraries may be affiliated with a specific campus, which is where their physical inventory is expected to circulate. See <a href="#">Configuring Inventory Management Groups</a> and <a href="#">Defining Display Logic Rules at the Campus Level</a>.</td>
</tr>
<tr>
<td>Cash balance</td>
<td>The money that is currently in the fund/ledger. [Cash balance] = [allocated balance] - [expenditures]. Does not count encumbrances or disencumbrances. See <a href="#">Fund Transaction Terminology</a>.</td>
</tr>
<tr>
<td>Catalog</td>
<td>The record repository of information in Alma. The catalog contains all descriptive metadata managed by a library, institution, consortium, or community. The Institution Catalog contains the institution’s local records. The Community Catalog contains records provided to all institutions, by Ex Libris or community-contributed. The Network Catalog contains records centrally-managed in a Network Zone. See <a href="#">Searching in Alma</a> and <a href="#">Introduction to Alma Inventory</a>.</td>
</tr>
<tr>
<td>Central Knowledge Base (CKB)</td>
<td>The part of the Community Zone that contains linking information to electronic resources around the world. See <a href="#">Introduction to Alma Inventory</a>.</td>
</tr>
<tr>
<td>Circulation Desk</td>
<td>The location in the library that handles patron fulfillment. See <a href="#">Circulation Desk Operations</a>.</td>
</tr>
<tr>
<td>Citation</td>
<td>An item that a student should read or watch in a course. Otherwise known as &quot;reading list citation&quot;. A citation is an element of a reading list. A citation can be a library resource, such as an item in the repository, a URL, an uploaded PDF, or nearly anything else. See <a href="#">Managing Citations</a>.</td>
</tr>
<tr>
<td>Cloud computing</td>
<td>The delivery of software and storage of data at a location (a server) remote from the physical location of the library, accessed using the internet. Alma is a cloud computing based service.</td>
</tr>
<tr>
<td>Code Table</td>
<td>An Alma feature for configuring a list of items, typically so that they can appear in a drop-down list elsewhere in Alma. See <a href="#">Code Tables</a>.</td>
</tr>
<tr>
<td>Collaborative Network</td>
<td>The overarching concept for all types of collaboration (for example, cataloging, acquisitions, fulfillment) between multiple institutions. In Alma, collaboration may include resource sharing, a fulfillment network, and/or the implementation of a Network Zone.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Collection</td>
<td>An Alma catalog entity (top level collection or sub-collection) that groups any number and type of resources together, allowing for enhanced organization of mixed-type materials based on topic-based hierarchical structures. See Managing Collections.</td>
</tr>
<tr>
<td>Community Catalog</td>
<td>Metadata records stored in the Community Zone, which are updated as required by Ex Libris or by contributions from the community. Inventory records can link to these records; alternatively, the current versions of these records can be copied to the institution and maintained locally. See Introduction to Alma Inventory</td>
</tr>
<tr>
<td>Community Zone</td>
<td>Ex Libris maintained resources available to all Alma institutions. Incorporates the Knowledge Base, the Community Catalog, and Global Authority Files. Can be accessed by any institution that is part of Alma for cataloging purposes. See Introduction to Alma Inventory</td>
</tr>
<tr>
<td>Continuous order</td>
<td>Includes both standing orders and serial orders.</td>
</tr>
<tr>
<td>Contract lead</td>
<td>The institution that manages its own sandbox, or its own sandbox and the sandboxes of other institutions. See Alma Sandbox Environments.</td>
</tr>
<tr>
<td>Controlled Vocabulary (CV)</td>
<td>A list of acceptable values for a subfield in the Metadata Editor. For example, a controlled vocabulary offers options when selecting Library of Congress subject headings. See Configuring Controlled Vocabulary Registry.</td>
</tr>
<tr>
<td>Copyright clearance</td>
<td>The process of getting permission to use copyrighted works. A digitization process may require performing copyright clearance. See Approving/Rejecting a Request for Digitization.</td>
</tr>
<tr>
<td>COUNTER</td>
<td>Counting Online Usage of NeTworked Electronic Resources compliant usage statistics is explained here: <a href="https://www.projectcounter.org/">https://www.projectcounter.org/</a>. See Managing COUNTER-Compliant Usage Data.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>A personal collection of Analytics reports. See Creating a Dashboard.</td>
</tr>
<tr>
<td>Database</td>
<td>A type of electronic collection whose resources cannot be individually managed through an interface. See Working with Database Type Electronic Collections.</td>
</tr>
<tr>
<td>Delivery</td>
<td>Enabling the patron who requested access to a digital resource to view or access a copy of that resource. See Configuring Digital Fulfillment.</td>
</tr>
<tr>
<td>Delivery rules</td>
<td>Rules that determine how content is delivered to users and external systems. The rules are configurable by the customer. See Configuring Electronic Document Delivery Rules.</td>
</tr>
<tr>
<td>Department</td>
<td>An area in the library where dedicated physical inventory actions take place, such as receiving acquired physical material and digitizing physical material. See Configuring Departments.</td>
</tr>
<tr>
<td>Deposit</td>
<td>The Deposit feature allows patrons to submit digital content to Alma to be added to the repository. For more information, see Deposit.</td>
</tr>
<tr>
<td>Descriptive Metadata</td>
<td>Descriptive Metadata, which appears in records in the Metadata management system (MMS).</td>
</tr>
<tr>
<td>Digital resource</td>
<td>A file or group of files with metadata that exists on a local network, a server, or in the cloud. It may include, among other possible formats, streaming media, e-books, video, or images. Digital resource files can be stored and managed externally, but the metadata is managed by Alma. The resource generally requires a viewer on the user’s machine. See Managing Digital Resources.</td>
</tr>
<tr>
<td>Digitization approval</td>
<td>The process of approving a digitization request. The process may include receiving copyright clearance from the proper agencies. See Digitization Processing.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Discovery</td>
<td>The feature that allows a patron to find records and inventory from the Alma Repository. Primo is Ex Libris’ system to provide discovery. See Primo.</td>
</tr>
<tr>
<td>Disencumbrance</td>
<td>The removal of an encumbrance. See <a href="#">Fund Transaction Terminology</a>.</td>
</tr>
<tr>
<td>DLF Electronic Resource Management Initiative (DLF ERMI)</td>
<td>An industry-wide, standardized solution developed by the Digital Library Federation. DLF ERMI handles the specifications and tools needed for managing the license agreements, related administrative information, and internal processes associated with collections of licensed electronic resources. See <a href="#">Adding ONIX-PL-Formatted Licenses</a>.</td>
</tr>
<tr>
<td>DOI</td>
<td>Digital object identifier. For more information, see <a href="http://www.doi.org">www.doi.org</a>.</td>
</tr>
<tr>
<td>Drools</td>
<td>A business rules management system based on the JBOSS Rules engine. In Alma, normalization rules are formatted in a similar manner to this system. See <a href="#">Working with Normalization Rules</a>.</td>
</tr>
<tr>
<td>Dublin Core</td>
<td>As standard to describe web and physical resources. See <a href="http://dublincore.org/">http://dublincore.org/</a>.</td>
</tr>
<tr>
<td>Electronic</td>
<td>Licensed material to which the institution subscribes and gets activated/de-activated.</td>
</tr>
<tr>
<td>Electronic collection</td>
<td>A collection of electronic resources that can contain packages (which include electronic portfolios) or databases (which include URLs). See <a href="#">Managing Electronic Collections</a>. Electronic collections are bundled together in a vendor interface.</td>
</tr>
<tr>
<td>Electronic resource</td>
<td>A digital object that is stored and managed externally from the local library or Institution Zone. See <a href="#">Managing Electronic Resources</a>.</td>
</tr>
<tr>
<td>Embedded order data (EOD) record</td>
<td>A record with vendor-supplied fields that describe the library’s purchase order for a resource (known as “embedded order confirmation record” by some vendors). Alma imports the EOD record, enters the description into the MMS, and turns the embedded order information into a PO line. See <a href="#">Import Profile Types</a>.</td>
</tr>
<tr>
<td>Encumbrance</td>
<td>A notation in a fund that a certain amount of the current cash balance is allocated to an impending purchase. Typically created as a result of a PO line. Encumbrances are canceled by disencumbrances (of the same amount) and typically replaced with expenditures (of the same amount). See <a href="#">Fund Transaction Terminology</a>.</td>
</tr>
<tr>
<td>EOD</td>
<td>MARC files from vendors with embedded order information. In Alma, they be used to create bibliographic records, holdings records, item records, and PO lines</td>
</tr>
<tr>
<td>Evaluation</td>
<td>The workflow to decide whether to purchase an electronic resource. One evaluation instance is a trial. See <a href="#">Evaluations and Trials</a>.</td>
</tr>
<tr>
<td>Event</td>
<td>An action that involves at least one entity or agent in the system. Used for audit trail purposes, you can view events associated with a job on the Running and History tabs of the Monitor Jobs page, as well as in Analytics. See <a href="#">Viewing Completed Jobs</a> and the Events subject area in Analytics.</td>
</tr>
<tr>
<td>Expenditure</td>
<td>A notation in a fund balance that an invoice was paid. See <a href="#">Fund Transaction Terminology</a>.</td>
</tr>
<tr>
<td>External system</td>
<td>An institution’s existing data management system that Alma may use as a source or target for information. Examples are a student information system or an ERP (enterprise resource planning system such as PeopleSoft). See <a href="#">Integrations with External Systems</a>.</td>
</tr>
<tr>
<td>Extract</td>
<td>A process that extracts data from the operational database and builds the Analytics data warehouse. See <a href="#">Data Privacy</a>.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Transform, and Load (ETL)</td>
<td>FAQs.</td>
</tr>
<tr>
<td>Facets</td>
<td>Facets are used in search results lists to filter the results. For example, PO lines may be filtered by fund, location, or digital format. See Facets, Filters, and Secondary Search.</td>
</tr>
<tr>
<td>FRBR</td>
<td>Functional Requirements for Bibliographic Records (see Library of Congress [PDF])</td>
</tr>
<tr>
<td>Fulfillment</td>
<td>The process by which patrons borrow and return physical resources, or access electronic or digital resources. See Introduction to Fulfillment.</td>
</tr>
<tr>
<td>Fulfillment policy</td>
<td>Stipulations of a Terms of Use contract. See Physical Fulfillment.</td>
</tr>
<tr>
<td>Fulfillment unit</td>
<td>A number of shelving locations with similar lending/return policies and blocks. See Physical Fulfillment.</td>
</tr>
<tr>
<td>Full text service</td>
<td>A service that provides the user with access to the full text of the e-resource. See Discovery Interface Display Logic.</td>
</tr>
<tr>
<td>Fund</td>
<td>Budgets for funding acquisitions. Funds are aggregated in a ledger. An allocated fund represents an actual budget. A summary fund is a collection of related or similar funds. See Fund Transaction Terminology.</td>
</tr>
<tr>
<td>Fund Code</td>
<td>Three levels of funds (broad to narrow) - ledger, summary funds, and allocated funds. Allocated funds have the actual money attached and are used for ordering.</td>
</tr>
<tr>
<td>Import Profile</td>
<td>An Alma feature defining how records from a file are imported, normalized, and mapped to Alma records. See Record Import.</td>
</tr>
<tr>
<td>In review</td>
<td>Orders (PO Lines and POs) and invoices that Alma flags as containing errors. They must be manually reviewed.</td>
</tr>
<tr>
<td>Institution</td>
<td>A group of campuses/libraries managed together, the basic unit managed using a single Alma installation. Multiple institutions can share services and management tasks using a collaborative network. For example, a university may be an Institution consisting of a main library, a science library, a business library, and several specialized libraries. See Configuring the Institution and Its Libraries.</td>
</tr>
<tr>
<td>Institution Catalog</td>
<td>The Institution Catalog contains the institution's local records. The Community Catalog contains records provided to all institutions, by Ex Libris or community-contributed. The Network Catalog contains records centrally-managed in a Network Zone.</td>
</tr>
<tr>
<td>Institution Zone</td>
<td>The area of the Metadata Management System comprising local institutional data such as locally managed bibliographic records, locally activated electronic portfolios, and local physical holdings. See Introduction to Alma Inventory.</td>
</tr>
<tr>
<td>Integration profile</td>
<td>A mechanism for integrating the import and export processes between Alma and an external system. See External Systems.</td>
</tr>
<tr>
<td>Interlibrary loan (ILL)</td>
<td>See resource sharing.</td>
</tr>
<tr>
<td>Intellectual entity (IE)</td>
<td>A resource that is being managed and described in the Alma system. An IE may have one or more holdings or digital representations. See Introduction to Alma Inventory.</td>
</tr>
<tr>
<td>Interested user</td>
<td>A user who will be notified about changes to a PO line. See Manually Creating a PO Line.</td>
</tr>
<tr>
<td>Inventory</td>
<td>The resources that are owned or licensed by or associated with a particular library, institution, or consortium. Includes physical holdings and items, electronic portfolios, digital representations, and deposits. All descriptive bibliographic metadata resides in the repository and can be edited using the Metadata Management System (MMS). See the Introduction to Alma Inventory.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Item</td>
<td>The inventory level of a resource for fulfillment and usage. Items may include bar codes and other identification details. See <a href="#">Introduction to Alma Inventory</a>.</td>
</tr>
<tr>
<td>Item Policy</td>
<td>Stipulations of a Terms of Use contract. See <a href="#">Physical Fulfillment</a>.</td>
</tr>
<tr>
<td>Itemized set</td>
<td>A group of objects whose set members are determined at the time the set is saved. The set is created after searching for items using a search query, but there is no stored relation between the set members and the query from which they were derived. The data in this set is static. See also Logical set. See <a href="#">Managing Search Queries and Sets</a>.</td>
</tr>
<tr>
<td>Job</td>
<td>A scheduled, invoked, or on-request process that runs in the background. See <a href="#">Overview of Jobs</a>.</td>
</tr>
<tr>
<td>KnowledgeBase</td>
<td>See Central Knowledge Base.</td>
</tr>
<tr>
<td>LCCN</td>
<td>Library of Congress Control Number for an item. See <a href="#">Creating a Borrowing Request</a>.</td>
</tr>
<tr>
<td>Ledger</td>
<td>A collection of funds, either summary funds or allocated funds. Ledgers have a fiscal period (they are relevant for a certain period of time, such as a fiscal year) which is inherited by the funds. See <a href="#">Managing Funds and Ledgers</a>.</td>
</tr>
<tr>
<td>Lending request</td>
<td>A resource sharing request placed by another institution’s patron and fulfilled by a resource of the local institution. Otherwise known as a resource sharing incoming request. See <a href="#">Requests in Alma</a>.</td>
</tr>
<tr>
<td>Library</td>
<td>The basic level in the hierarchical structure of management within Alma, which is collaborative network, institution, campus, and library. A library can have departments that handled work orders, as well as locations and circulation desks that are well-known to the library patrons. See <a href="#">Configuring the Institution and Its Libraries</a>.</td>
</tr>
<tr>
<td>License</td>
<td>A contract between the library and a vendor for the lease of one or more copyrighted bibliographic databases or online resources. See <a href="#">Managing Licenses and Amendments</a>.</td>
</tr>
<tr>
<td>Local catalog</td>
<td>Materials managed at your local institutions. See catalog.</td>
</tr>
<tr>
<td>Local portfolio</td>
<td>A portfolio that exists in the Institution Zone. See <a href="#">Portfolio</a>.</td>
</tr>
<tr>
<td>Localizing</td>
<td>Creating a local copy of something, such as an electronic resource. The item is copied from the Community Zone to the Institution Zone. For electronic resources, this is typically done before or while activating the resource. See <a href="#">Activating Electronic Resources</a>.</td>
</tr>
<tr>
<td>Location</td>
<td>A physical place where items are stored (for example, a shelving location). See <a href="#">Physical Locations</a>.</td>
</tr>
<tr>
<td>Logical set</td>
<td>A saved search query. The items in the change every time the set is run based on the most current results of the query. See <a href="#">Managing Search Queries and Sets</a>.</td>
</tr>
<tr>
<td>Management tag</td>
<td>The record's brief level, as well as fields that determine whether to publish records to a discovery system or export the record. Publish and export fields can be set during record import or from within the Metadata editor. See <a href="#">Navigating the MD Editor Page</a>.</td>
</tr>
<tr>
<td>Mapping Table</td>
<td>An Alma feature for configuring settings for a list of items, such as customer parameters. See <a href="#">Mapping Tables</a>.</td>
</tr>
<tr>
<td>MARC record</td>
<td>A MAchine Readable Cataloging record, a standard record format for library cataloging information, including bibliographic, authority, and holding records. See <a href="https://www.loc.gov/marc/umb/um01to06.html">https://www.loc.gov/marc/umb/um01to06.html</a>.</td>
</tr>
<tr>
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<td>Definition</td>
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<td>-----------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Alma supports MARC21 records (a North</td>
<td>Alma supports MARC21 records (a North American standard), and can also support alternate MARC formats such as CNMARC (a Chinese standard), UNIMARC (a European standard), and KORMARC (A Korean standard).</td>
</tr>
<tr>
<td>American standard), and can also support</td>
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<tr>
<td>alternate MARC formats such as CNMARC</td>
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<td></td>
</tr>
<tr>
<td>Korean standard).</td>
<td></td>
</tr>
<tr>
<td>Match method</td>
<td>Defined methods Alma uses to identify duplicate records during a record import. When a record is loaded, Alma attempts to find a similar record based on the enabled match method. See Match Methods - Explanations and Examples.</td>
</tr>
<tr>
<td>Material type</td>
<td>The type of material, such as a book or electronic journal collection, from which an item takes its form. Note that the material type does not control the PO line workflow and can be modified when creating/editing a PO line. Unless hidden, an item's material type appears in Primo's Get It/Details tabs. Material types are system-defined, but they can be enabled or disabled and their labels can be configured. See Configuring Physical Item Material Type Descriptions.</td>
</tr>
<tr>
<td>Member institution</td>
<td>An institution that is part of a collaborative network. For example, one of the institutions implementing a shared Network Zone.</td>
</tr>
<tr>
<td>Metadata editor</td>
<td>The tool for editing and creating bibliographic and holdings records in Alma. See Navigating the MD Editor Page.</td>
</tr>
<tr>
<td>Metadata management system (MMS)</td>
<td>The interfaces, functions, and data that define institutional systems and allow them to manipulate their descriptive metadata. The MMS includes a Community Zone and an Institution Zone. See Introduction to Alma Inventory.</td>
</tr>
<tr>
<td>Metadata Management System ID (MMS ID)</td>
<td>The record ID number. The MMS ID can be 8 to 19 digits long (with the first two digits referring to the record type and the last four digits referring to a unique identifier for the institution). See Record Numbers and Exporting Metadata for more information. Also see the video Institution MMS ID in Bibliographic Records (1:49).</td>
</tr>
<tr>
<td>Metadata profile</td>
<td>A set of configuration parameters that define the cataloging environment you use when working in the MD Editor. See Configuring Cataloging.</td>
</tr>
<tr>
<td>National Union Catalogue (NUC)</td>
<td>Printed catalog of books from the Australia library of congress. See Publishing to Libraries Australia.</td>
</tr>
<tr>
<td>Network Zone</td>
<td>A management tool used by a collaborative network to centrally manage certain features, such as configuration tables, licenses, and records. A virtual institution (also called the Network Zone) is used as the management interface and central repository and catalog. See Managing Multiple Institutions Using a Network Zone.</td>
</tr>
<tr>
<td>Non-repository citations</td>
<td>Titles that are used for a course’s reading list, with no link to an Alma repository item. These are typically faculty resources that are not part of the institution's inventory, such as an article at an external website. See Adding Citations to a Reading List.</td>
</tr>
<tr>
<td>Normalization rules</td>
<td>A set of rules that can be built and applied to bibliographic records in order to enhance the record. These rules may add fields, remove fields, or make changes to fields. The rules can be applied to an individual record during bulk import and as part of the global update process. See Working with Normalization Rules.</td>
</tr>
<tr>
<td>OCLC control number / OCLC number</td>
<td>WorldCat Online Computer Library Center control number. See <a href="https://www.oclc.org/batchload/controlnumber.en.html">https://www.oclc.org/batchload/controlnumber.en.html</a>.</td>
</tr>
<tr>
<td>One-time order</td>
<td>An order for a one-time resource, for example, a book, a print journal, and a one-time electronic book.</td>
</tr>
<tr>
<td>OpenURL</td>
<td>A type of Uniform Resource Locator (URL) that contains the address of an OpenURL Web site combined with the item's identification. The Alma Link Resolver responds to OpenURL requests and directs the patron to the resource. For more information, see <a href="http://www.exlibrisgroup.com/category/sfxopenurl">http://www.exlibrisgroup.com/category/sfxopenurl</a>.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Organization unit</td>
<td>An institution or library. Also, a library which can be configured for fulfillment and which controls the fulfillment unit collections under its control. An organizational unit may have staff users, a physical (billing) address, departments, a circulation desk, funds, and other objects associated with it. See Library.</td>
</tr>
<tr>
<td>Package</td>
<td>A type of electronic collection whose resources can be individually managed through an interface.</td>
</tr>
<tr>
<td>Packaging</td>
<td>An automated method by which PO lines are passed through normalization and validations and are brought together into a purchase order, ready for approval. See Packaging PO Lines into a PO.</td>
</tr>
<tr>
<td>Patron digitization request</td>
<td>A request by a patron for the digitization of a resource. See Digitization Processing.</td>
</tr>
<tr>
<td>Patron Directory Service (PDS)</td>
<td>A back-end Web component that facilitates user authentication and signing in to the system. PDS is part of the standard calling application package, but it is a distinct and separate component. It does not have a user database of its own. It works with the institution's authentication server(s) and user database(s), such as an LDAP directory service. See Alma and Patron Directory Services.</td>
</tr>
<tr>
<td>Persistent search box</td>
<td>A search box consisting of various search options. The persistent search box is always available from the top middle of any Alma page. See Searching in Alma.</td>
</tr>
<tr>
<td>Physical</td>
<td>&quot;Physical&quot; refers to anything with a holding/item, including &quot;Print&quot; items (print books, print journals). Note you can have a holding without an item but not an item without a holding.</td>
</tr>
<tr>
<td>Physical titles (search)</td>
<td>&quot;Physical titles&quot; will search all indexed fields from records with &quot;physical&quot; inventory</td>
</tr>
<tr>
<td>PID</td>
<td>Alma system number for an inventory entity. It can be used, for example, by the Portfolio Loader for matching purposes. The PID can be 8 to 19 digits long. See Configuring Search Indexes.</td>
</tr>
<tr>
<td>PMID</td>
<td>PubMed identifier. See more information about PubMed.</td>
</tr>
<tr>
<td>PO (purchase order)</td>
<td>A group of PO lines sent to a single vendor. Otherwise known as an order. Sending a PO is known as ordering. For more information, see Purchasing Workflow.</td>
</tr>
<tr>
<td>PO (purchase order) line</td>
<td>One or more copies of a bibliographic item purchased by a library. Purchases can be physical, electronic, or digital, and they may be one-time, continuous (for example, subscriptions), or standing orders. For more information, see Purchasing Workflow.</td>
</tr>
<tr>
<td>PO (purchase order) line type</td>
<td>Also purchase type. Defines the type of inventory and continuity (one-time or continuous) of the PO line. For more information, see Explanation of Purchase Types Workflow &amp; Inventory.</td>
</tr>
<tr>
<td>PO Line Owner</td>
<td>Unit/Library responsible for creating the order (often responsible for receiving and paying for order as well)</td>
</tr>
<tr>
<td>Portfolio (Electronic Portfolio)</td>
<td>Electronic resource (inventory) that maintains the specific coverage (local or global), services, and link information relevant for a particular electronic title that may also be part of an electronic collection. It may include administrative/access information. See Managing Local Portfolios and Managing Electronic Resources for more information.</td>
</tr>
<tr>
<td>Primo/Primo VE</td>
<td>Ex Libris' discovery system for patrons. A single search interface that provides a gateway to a wealth of scholarly content, including print, electronic and digital collections. See here for more information on Primo. See here for information on Primo VE.</td>
</tr>
<tr>
<td>Primo Central Index</td>
<td>Primo's central database. A mega-aggregation of hundreds of millions of scholarly e-resources of global and regional importance. These include journal articles, e-books, reviews, legal documents and more that are harvested from primary</td>
</tr>
<tr>
<td>Term</td>
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</tr>
<tr>
<td>and secondary...</td>
<td>See here for more information.</td>
</tr>
<tr>
<td>Privileges</td>
<td>Permissions to perform certain actions in Alma, or to access specific pages, fields, or options in Alma. A user role is defined by the privileges that it grants the user. See Managing User Roles.</td>
</tr>
<tr>
<td>Process</td>
<td>A job run on a set of records. See Working with Normalization Processes.</td>
</tr>
<tr>
<td>Process Type</td>
<td>How a resource is currently being processed (processing stage or work order type). See Requests in Alma.</td>
</tr>
<tr>
<td>Public trial</td>
<td>Trial feedback may be received from a predefined trial participant group and from general users. See Managing Trials.</td>
</tr>
<tr>
<td>Publishing</td>
<td>A process that extracts and formats metadata for external uses, such as for discovery in Primo. See Resource Management.</td>
</tr>
<tr>
<td>Purchase request</td>
<td>An item requested to be purchased by an instructor or patron (or on behalf of an instructor or patron). Also known as a Patron Purchase Request (PPR). See Purchase Requests.</td>
</tr>
<tr>
<td>Reading list</td>
<td>A list of citations for a specific course. See Managing Reading Lists. Reading lists may be divided into sections.</td>
</tr>
<tr>
<td>Receiving</td>
<td>The process of accepting physical items shipped to the library by vendors. See Receiving Material.</td>
</tr>
<tr>
<td>Receiving department</td>
<td>In Alma, receiving physical material is organized within receiving departments. A user must be at a certain Receiving department to be able to receive the orders associated with that department. Select the receiving department with the location icon or drop-down list (one or the other based on your setting) on the persistent menu bar. The current location is listed there. In the drop-down list, make sure that the Always Show Current Location box is selected. In some cases, the receiving department corresponds to the PO line owner.</td>
</tr>
<tr>
<td>Receiving note</td>
<td>A text note intended for the receiver (receiving operator).</td>
</tr>
<tr>
<td>Record</td>
<td>A discrete, manageable entity in Alma. Examples include repository records (bibliographic records, authority records), inventory (physical items, electronic portfolios, digital representations, deposits), PO lines, users, reading lists, vendors, and so forth. Does not include stored configuration information, such as your configured code and mapping table information, your institution's logo and IP information, and other institution-specific information stored in the Alma database.</td>
</tr>
<tr>
<td>Record List</td>
<td>An Alma list that displays a list of Alma records. See Record Lists.</td>
</tr>
<tr>
<td>Regular expression</td>
<td>A series of characters that define a search/match pattern. See MSDN's Regular Expression Language - Quick Reference.</td>
</tr>
<tr>
<td>Release and...</td>
<td>Alma releases include new features and functionality, and also fixes and improvements (performance improvements, etc.). Release Updates include only fixes and improvements in the software, but do not include any new features. Release updates are provided one week after the main release.</td>
</tr>
<tr>
<td>Remote storage</td>
<td>An off-site storage facility. A location that is used to store physical library materials at a distance from the library. Remote storage facilities can be shared by a number of institutions and managed by a system other than the institution's library system. See Requests to Remote Storage Facilities.</td>
</tr>
<tr>
<td>Reporting code</td>
<td>An attribute of a PO line or invoice line that codes a type of material within the ledger and fund system. For example: monograph, e-journal. This allows reporting on funds by attributes other than the funds hierarchy. See Configuring Reporting Codes.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Repository</td>
<td>All information that Alma has about library material, including inventory, such as physical titles and items, electronic titles, electronic collections and electronic portfolios, digital titles and representations, deposits, management collections, and authorities. The repository title record (located via an All titles, Physical titles, Electronic titles, or Digital titles search) is the bibliographic record for the title (that can be edited in the MD Editor using one of the cataloging standards such as MARC 21). The repository includes titles for which your institution may not have any inventory, as well as your institution's normalization, merge, and indication rules. All descriptive metadata can be edited using the Metadata Management System (MMS). See <a href="#">Navigating the MD Editor Page</a> and <a href="#">Searching in Alma</a> for more information.</td>
</tr>
<tr>
<td>Representation</td>
<td>The digital record level under the bibliographic record level. This level acts as a container for the digital files. Multiple representations can be attached to the bibliographic record. One representation can be the master copy and another a derivative copy and can differ in format, resolution, or size. See <a href="#">Managing Digital Resources</a>.</td>
</tr>
<tr>
<td>Request</td>
<td>A resource request (or just &quot;request&quot;) is for the acquisition, manipulation, movement, or processing of inventory. An external request, such as an OpenURL request, is a request to locate a resource originating external to Alma, such as a request from Primo. For more information, see <a href="#">Requests in Alma</a>.</td>
</tr>
<tr>
<td>Requester</td>
<td>The user for whom a request is made. The request form can be filled out by the requesting user or by a staff user on behalf of the requester. See <a href="#">Creating a Request from the Institution</a>.</td>
</tr>
<tr>
<td>Resource request</td>
<td>A request to make a library resource available at a specific location for a specific purpose. The resource request may be triggered by a patron-initiated request or by an internal library work order requests. For more information, see <a href="#">Requests in Alma</a>.</td>
</tr>
<tr>
<td>Resource Sharing</td>
<td>Resource sharing enables a request by a patron in one institution fulfilled by another institution. The fulfillment of the request is invisible to the patron: the patron requests and returns the item to the patron's local institution. See <a href="#">Resource Sharing Workflow</a>.</td>
</tr>
<tr>
<td>Resource sharing partner</td>
<td>An institution or a distinct external ILL system that participates in a resource sharing process, either as borrower or as lender. See <a href="#">Resource Sharing Partners</a>.</td>
</tr>
<tr>
<td>Resource type</td>
<td>The type of item in the repository (based on existing bibliographic fields, such as the LDR and 008) or being ordered. A resource is physical, electronic, or digital, but may have a more specific type (not including its physical material type). See <a href="#">The Resource Type Field</a> and <a href="#">Creating/Editing an Import Profile: Inventory Information</a>.</td>
</tr>
<tr>
<td>Rota list</td>
<td>A list of potential lending partners that are searched to fulfill the sharing request. See <a href="#">Resource Sharing Partners and Rotas</a>.</td>
</tr>
<tr>
<td>Rules Table</td>
<td>An Alma feature for configuring a list of rules that are processed in order in order to control some functional flow. See <a href="#">Rules Tables</a>.</td>
</tr>
<tr>
<td>Secondary search</td>
<td>A search field that appears above some tables and lists. Use this search to search within the table or list. See <a href="#">Facets, Filters, and Secondary Search</a>.</td>
</tr>
<tr>
<td>Selective package</td>
<td>A type of electronic collection that includes only some of the collection’s titles (as opposed to an aggregator package, which includes all of the e-collection's titles). See <a href="#">Adding a Local Electronic Collection</a>.</td>
</tr>
<tr>
<td>Service</td>
<td>A resource that can be purchased by a library, with or without inventory. For example, a library might purchase access to a particular website as a service. See <a href="#">Manually Creating a PO Line</a>.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Set</td>
<td>A group of items or a saved search query. A set is created so that multiple items can be worked on by a job. See Managing Search Queries and Sets. A set is either logical or itemized.</td>
</tr>
<tr>
<td>Slip ID</td>
<td>A number for a transitory set of records affected by a job. See Configuring Search Indexes.</td>
</tr>
<tr>
<td>SIP2</td>
<td>A protocol from 3M that provides a standard interface between a library’s automated circulation system and library automation devices. See Configuring SIP2 Bin Configuration.</td>
</tr>
<tr>
<td>Staff user</td>
<td>An individual who has permissions to work in Alma. Also known simply as a user. See Managing Users.</td>
</tr>
<tr>
<td>Summary funds</td>
<td>Funds that are used for aggregate reporting on the subordinate (child) funds. Summary funds can contain other summary funds or allocated funds. Summary funds are not used for ordering or invoicing. See Managing Funds and Ledgers.</td>
</tr>
<tr>
<td>Suppress</td>
<td>Mark a record to prevent it from discovery. See Suppress from Discovery for more information.</td>
</tr>
<tr>
<td>Target</td>
<td>An electronic collection in Alma terminology. See Electronic collection above. For more information, see the SFX Target and Alma E-Collection Configuration Guide.</td>
</tr>
<tr>
<td>Task</td>
<td>An operation waiting for manual user intervention. See Tasks in the Task List. Alternatively, a single step in a process, such as a normalization process. See Working with Normalization Processes.</td>
</tr>
<tr>
<td>Task list</td>
<td>A list of user tasks appearing in the persistent menu. See Tasks in the Task List.</td>
</tr>
<tr>
<td>Terms of Use</td>
<td>A list of predefined fulfillment policies that defines the institution/library commitment to the patron and under which the service will be provided or disconnected. See Configuring Terms of Use.</td>
</tr>
<tr>
<td>Transaction</td>
<td>A financial activity that may impact the fund’s balance. See Performing Fund Transactions.</td>
</tr>
<tr>
<td>Transit Slip</td>
<td>A printed slip attached to a physical item that is placed in transit. The slip identifies the requested material and its destination. For example, see Managing the Hold Shelf.</td>
</tr>
<tr>
<td>Transit time</td>
<td>The time it takes for a physical item to make it from one location to another. See Configuring Transit Time Rules.</td>
</tr>
<tr>
<td>Trial</td>
<td>An instance of an evaluation of a resource before purchasing it. See Managing Trials.</td>
</tr>
<tr>
<td>Unified resource management (URM)</td>
<td>The Ex Libris resource management framework that allows libraries to optimize technical support, purchasing power, collections, and staff knowledge and resources. See The URM Vision.</td>
</tr>
<tr>
<td>Update Inventory</td>
<td>The process of loading enhanced-cataloging records.</td>
</tr>
<tr>
<td>User</td>
<td>A person with an Alma user account: a staff user, an instructor, or a patron. See User Management.</td>
</tr>
<tr>
<td>User blocks</td>
<td>Flags on a user’s account that can prevent various fulfillment activities such as requests or loans. See Blocking and Unblocking Users.</td>
</tr>
<tr>
<td>User role profiles</td>
<td>A predefined group of roles (including scopes) that may be attached to users in one action. See Configuring Role Profiles.</td>
</tr>
<tr>
<td>User roles</td>
<td>The privileges that a user has to work on Alma. A user's roles (actually, the roles' privileges) determine a user's access to certain pages, fields, options and areas on certain pages, as well as the ability to run certain jobs and processes. A user role may have a specific scope, related to a specific library. See Managing User Roles.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>Vendor</td>
<td>The supplier of physical or electronic goods or services. For physical goods, the vendor is a material supplier. For electronic goods or services, the vendor is the access provider, or there may be a third-party access provider. See Managing Vendors.</td>
</tr>
<tr>
<td>Vendor account</td>
<td>A subset of the vendor; may contain business rules for specific types of data. For example, a rush account may contain contacts and instructions on how to handle this material. See Managing Vendors.</td>
</tr>
<tr>
<td>Vendor Code</td>
<td>The supplier of physical or electronic goods or services. For physical goods, the vendor is a material supplier. For electronic goods or services, the vendor is the access provider or a third-party access provider.</td>
</tr>
<tr>
<td>Vendor interface</td>
<td>A collection of electronic collections offered by a vendor. A vendor interface is also known as a platform. See Managing Vendors.</td>
</tr>
<tr>
<td>Vendor invoice number</td>
<td>A number assigned to all PO lines uploaded from the same invoice file from an EOD. See Embedded Order Data (EOD) Field Mapping.</td>
</tr>
<tr>
<td>Vocabulary</td>
<td>A specified list of terms developed by creators of catalogs and databases to ensure precise and comprehensive searching. The terms may vary from database to database. See Configuring Controlled Vocabulary Registry.</td>
</tr>
<tr>
<td>Widget</td>
<td>A small visual link found on the dashboard, which can be controlled by the operator. Examples include reports for graphs suitable for your area of interest, or access to a calendar, local weather, or a link to notifications. See Managing Widgets.</td>
</tr>
<tr>
<td>Work order</td>
<td>An internal library request to route physical materials for internal processing. A work order sends an item to a work order department (marking it as not available on the shelf), where it can be managed according to internal statuses. Both departments and statuses are configurable and can be used to manage tasks according to a library’s local needs. See Managing Requests and Work Orders.</td>
</tr>
<tr>
<td>Z39.50</td>
<td>A client–server protocol for searching and retrieving information from remote computer databases. See Z39.50 Search.</td>
</tr>
</tbody>
</table>