

## Alma Glossary

Term	Definition
<Alma base URL>	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> .
Access provider	The party that provides access to electronic goods or services; may or may not be the vendor that sells the access.
Access rights	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> .
Accrued fines	Fines that are calculated for overdue loans, and represent what will be the fine that will be charged if the patron returns the overdue item now. The fine is a calculated one - it is not charged yet on the patron account and therefore does not trigger any cash related blocks.
Acquisitions Libraries	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.
Action menu	In the persistence menu, there are actions available according to the user role. For example, Tasks, Recent Entities and RFID. See <a href="#">The Alma User Interface - Ex Libris Knowledge Center (exlibrisgroup.com)</a>
Activate	See <a href="#">Localize</a> .
Activation	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> .
Active	See <a href="#">Available</a> .
AFN	See <a href="#">Fulfillment network</a> .
Aggregator package	An electronic collection for which the library typically will activate the entire collection (and not only specific portfolios). Note that a "Selective" package and an "Aggregator" package behave the same when the flag "Automatically activate new portfolios" is checked in the electronic collection activation wizard. See <a href="#">Adding a Local Electronic Collection</a> .
All titles (search)	When searching "All titles," that really means "All records," 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.
Allocated balance	The total amount of money initially available for the fund. This amount does not change when expenditures are made or encumbrances are 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> .
Allocated fund	A representation of an actual budget used for purchasing. See <i>Fund</i> , and also see <a href="#">Fund Transaction Terminology</a> .
Alma Link Resolver	<p>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.</p> <p>For more information, see the training video <a href="#">Alma Link Resolver</a>.</p>

Term	Definition
Digital Viewer	An Alma tool for viewing digital files. See <a href="#">The Digital Viewer</a> .
Alma-P Alma-E Alma-D Alma-C	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> .
Analysis	The querying option within Analytics that allows a user to create a report.
Analytics	Alma component used to manage data reports and dashboards. See <a href="#">Introduction to Analytics and Terminology</a> .
Article Request	Request for an article or pages of an article.
Available	Electronic or Physical resource that can be accessed via Alma Link Resolver or physical resource that is not in any current process.
Available balance	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> .
Bibliographic Material Type	One of seven predefined formats for a bibliographic record as defined by Library of Congress and referred to at <a href="http://www.loc.gov/marc/bibliographic/bd008.html">www.loc.gov/marc/bibliographic/bd008.html</a> : Books (BK), Computer Files (CF), Maps (MP), Music (MU), Continuing Resources (CR), Visual Materials (VM), and Mixed Materials (MX). For additional information, see table "Scope of Bibliographic Format" at <a href="#">Material Types in Search Results</a> . This field is significantly more general than the more specific Bibliographic Resource Type.
Bibliographic record	A bibliographic record is an entry in the <a href="#">library catalog</a> , which represents and describes a specific resource.
Bibliographic Resource Type	One of several descriptions of the bibliographic record as defined by a combination of fields, predominantly being the LDR and 008. This field is significantly more specific than the Bibliographic Material type, thereby allowing the Alma staff user to search or facet in a more precise manner. For additional information, see <a href="#">The Resource Type Field</a> .
Book	A physical book which is referred to as monographic (any nonserial publication) represents a bibliographic unit that is physically attached to or contained in another unit such that the retrieval of the component part is dependent on the identification and location of the host item or container. Book can also be provided as an electronic book which can be referred to as eBook.
Borrower	See <a href="#">Requesting Library</a> .
Borrowing request	A resource sharing request placed by a local patron and fulfilled by another institution's resource, otherwise known as a resource sharing outgoing request. See <a href="#">Requests in Alma</a> .
Brief level	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: <b>Brief record</b> .
Brief record	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: <b>Brief level</b> .
Bursar Transaction ID	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> .

Term	Definition
Campus	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> .
Cancel	See <a href="#">Reject</a> .
Cash balance	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> .
Catalog	<p>The record repository of information in Alma. The catalog contains all descriptive metadata managed by a library, institution, consortium, or community.</p> <p>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.</p> <p>See <a href="#">Searching in Alma</a> and <a href="#">Introduction to Alma Inventory</a>.</p>
Cataloging	See <a href="#">Metadata Management</a> .
Central Knowledge Base (CKB)	The part of the Community Zone that contains linking information to electronic resources around the world. See <a href="#">Introduction to Alma Inventory</a>
Central Discovery Index (CDI)	CDI is a central discovery index – leveraging existing assets - that supports both Summon and Primo and delivers enhanced discovery, streamlines library management, and provides operational efficiencies.
Charges	See <a href="#">Shipping Costs</a> .
Check in Item	Return a physical item to the library.
Circulation Desk	The location in the library that handles patron fulfillment. See <a href="#">Circulation Desk Operations</a> .
Citation	<p>An item that a student should read or watch in a course. Otherwise known as "reading list citation".</p> <p>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>.</p>
Cloud computing	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.
Code Table	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> .
Collaborative Network	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.
Collection	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 <a href="#">Managing Collections</a> .

Term	Definition
Community Catalog	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 <a href="#">Introduction to Alma Inventory</a> .
Community Zone	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 <a href="#">Introduction to Alma Inventory</a> .
Consortia	See <a href="#">Network Zone</a> .
Continuous order	Includes both standing orders and serial orders. See <a href="#">Subscription</a> .
Contract lead	The institution that manages its own sandbox, or its own sandbox and the sandboxes of other institutions. See <a href="#">Alma Sandbox Environments</a> .
Controlled Vocabulary (CV)	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 <a href="#">Configuring Controlled Vocabulary Registry</a> .
Copy Request	See <a href="#">Digital Request</a> .
Copyright clearance	The process of getting permission to use copyrighted works. A digitization process may require performing copyright clearance. See <a href="#">Approving/Rejecting a Request for Digitization</a> .
COUNTER	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 <a href="#">Managing COUNTER-Compliant Usage Data</a> .
Dashboard	A personal collection of Analytics reports. See <a href="#">Creating a Dashboard</a> .
Database	A type of electronic collection whose resources cannot be individually managed through an interface. See <a href="#">Working with Database Type Electronic Collections</a> .
Delivery	Enabling the patron who requested access to a digital resource to view or access a copy of that resource. See <a href="#">Configuring Digital Fulfillment</a> .
Delivery rules	Rules that determine how content is delivered to users and external systems. The rules are configurable by the customer. See <a href="#">Configuring Electronic Document Delivery Rules</a> .
Department	An area in the library where dedicated physical inventory actions take place, such as receiving acquired physical material and digitizing physical material. See <a href="#">Configuring Departments</a> .
Deposit	The Deposit feature allows patrons to submit digital content to Alma to be added to the repository. For more information, see <a href="#">Deposit</a> .
Descriptive Metadata	Descriptive Metadata, which appears in records in the Metadata management system (MMS).
Digital Request	Request to receive an item in digital format, typically as a scanned digital file, a.k.a 'document delivery'.
Digital resource	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 <a href="#">Managing Digital Resources</a> .

Term	Definition
Digitization approval	The process of approving a digitization request. The process may include receiving copyright clearance from the proper agencies. See <a href="#">Digitization Processing</a> .
Discovery	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.
Disencumbrance	The removal of an encumbrance. See <a href="#">Fund Transaction Terminology</a> .
Distributed Electronic Resources	The ability of Alma institution to manage electronic resources separately for a group of library/campuses.
DLF Electronic Resource Management Initiative (DLF ERM)	An industry-wide, standardized solution developed by the Digital Library Federation. DLF ERM 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> .
Document Delivery	Request to receive an item in digital format, typically as a scanned digital file, a.k.a 'digital request'.
DOI	Digital object identifier. For more information, see <a href="http://www.doi.org">www.doi.org</a> .
Drools	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> .
Dublin Core	As standard to describe web and physical resources. See <a href="http://dublincore.org/">http://dublincore.org/</a> .
Electronic	Licensed material to which the institution subscribes and gets activated/de-activated.
Electronic collection	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. Also see <a href="#">Package</a> .
Electronic resource	A digital object that is stored and managed externally from the local library or Institution Zone. See <a href="#">Managing Electronic Resources</a> .
Embedded order data (EOD) record	A record with vendor-supplied fields that describe the library's purchase order for a resource (known as an "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> .
Encumbrance	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> .
Entity	See <a href="#">Record</a> .
EOD	MARC files from vendors with embedded order information. In Alma, they are used to create bibliographic records, holdings records, item records, and PO lines
Evaluation	The workflow to decide whether to purchase an electronic resource. One evaluation instance is a <i>trial</i> . See <a href="#">Evaluations</a>

Term	Definition
	<a href="#">and Trials</a> .
Event	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 <a href="#">System Events</a> subject area in Analytics.
Expenditure	A notation in a fund balance that an invoice was paid. See <a href="#">Fund Transaction Terminology</a> .
External system	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> .
Extract, Transform, and Load (ETL)	A process that extracts data from the operational database and builds the Analytics data warehouse. See <a href="#">Data Privacy FAQs</a> .
Facets	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 <a href="#">Facets, Filters, and Secondary Search</a> .
FN	See <a href="#">Fulfillment network</a> .
FRBR	Functional Requirements for Bibliographic Records (see <a href="#">Library of Congress</a> [PDF])
Fulfillment	The process by which patrons borrow and return physical resources, or access electronic or digital resources. See <a href="#">Introduction to Fulfillment</a> .
Fulfillment network	A group of institutions that allow directly requesting hold and digitization requests from one another. Patrons of any institution can directly place requests of any type on items of any other institution in the network.
Fulfillment policy	Stipulations of a Terms of Use contract. See <a href="#">Physical Fulfillment</a> .
Fulfillment unit	A number of shelving locations with similar lending/return policies and blocks. See <a href="#">Physical Fulfillment</a> .
Full text service	A service that provides the user with access to the full text of the e-resource. See <a href="#">Discovery Interface Display Logic</a> .
Fund	Budgets for funding acquisitions. Funds are aggregated in a ledger. An <i>allocated fund</i> represents an actual budget. A <i>summary fund</i> is a collection of related or similar funds. See <a href="#">Fund Transaction Terminology</a> .
Fund Code	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.
General Publishing	The General Publishing process provides the ability of Publishing bibliographic, authority and holdings records to third-party systems.  See <a href="#">Publishing and Inventory Enrichment (General Publishing) - Ex Libris Knowledge Center (exlibrisgroup.com)</a>
Import Profile	An Alma feature defining how records from a file are imported, normalized, and mapped to Alma records. See <a href="#">Record Import</a> .
In Reading Room	An item that is shelved and intended to be used at the reading room only, a.k.a 'non circulating' item.
In review	Orders (PO Lines and POs) and invoices that Alma flags as containing errors. They must be manually reviewed.

Term	Definition
Incoming Request	See <a href="#">Lending Request</a> .
Institution	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 <a href="#">Configuring the Institution and Its Libraries</a> .
Institution Catalog	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.
Institution Zone	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 <a href="#">Introduction to Alma Inventory</a> .
Integration profile	A mechanism for integrating the import and export processes between Alma and an external system. See <a href="#">External Systems</a> .
Interlibrary loan (ILL)	See <a href="#">Resource Sharing</a> .
Intellectual entity (IE)	A resource that is being managed and described in the Alma system. An IE may have one or more holdings or digital representations. See <a href="#">Introduction to Alma Inventory</a> .
Interested user	A user who will be notified about changes to a PO line. See <a href="#">Manually Creating a PO Line</a> .
Inventory	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 <a href="#">Introduction to Alma Inventory</a> .
Item	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> .
Item in place	The item is in place on its shelf.
Item not in place	The item is not on its shelf. It is recorded as being somewhere else (for example, on loan, in transit, or in process of acquisition) and is not placed on the shelf yet.
Item Policy	Stipulations of a Terms of Use contract. See <a href="#">Physical Fulfillment</a> .
Itemized set	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> .
Job	A scheduled, invoked, or on-request process that runs in the background. See <a href="#">Overview of Jobs</a> .
Journal	A journal is a publication that comes out on a regular basis and contains articles. See <a href="#">Periodical</a> and <a href="#">Serial</a> .
KnowledgeBase	See Central Knowledge Base.
LCCN	Library of Congress Control Number for an item. See <a href="#">Creating a Borrowing Request</a> .

Term	Definition
Ledger	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> .
Lender	See <a href="#">Supplying Library</a> .
Lending request	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> .
Lending String	See <a href="#">Rota</a> or <a href="#">Rota Template</a> .
Library	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> .
Library Use Only	See <a href="#">In Reading Room</a> .
License	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> .
Loan Request	See <a href="#">Physical Request</a> .
Local catalog	Materials managed at your local institutions. See catalog.
Local portfolio	A portfolio that exists in the Institution Zone. See <a href="#">Portfolio</a> .
Localize	To create a linked copy of a Community Zone electronic resource in the Institution Zone.
Localizing	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> .
Locate	The automatic process of identifying potential resource sharing lenders that own the resource being requested.
Location	A physical place where items are stored (for example, a shelving location). See <a href="#">Physical Locations</a> .
Logical set	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> .
Main menu	The main menu is used to navigate in Alma. It is also referred to as the navigation bar. The main menu is comprised of main entries, categories and menu entries.
Management tag	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> .
Mapping Table	An Alma feature for configuring settings for a list of items, such as customer parameters. See <a href="#">Mapping Tables</a> .
MARC record	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> .  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).

Term	Definition
Match method	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 <a href="#">Match Methods - Explanations and Examples</a> .
Material type	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 <a href="#">Configuring Physical Item Material Type Descriptions</a> .
Member institution	An institution that is part of a collaborative network. For example, one of the institutions implementing a shared Network Zone.
Menu icons	See <a href="#">Action menu</a> .
Metadata editor	The tool for editing and creating bibliographic and holdings records in Alma. See <a href="#">Navigating the MD Editor Page</a> .
Metadata management system (MMS)	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 <a href="#">Introduction to Alma Inventory</a> .
Metadata Management System ID (MMS ID)	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 <a href="#">Record Numbers</a> and <a href="#">Exporting Metadata</a> for more information. Also see the video <a href="#">Institution MMS ID in Bibliographic Records</a> (1:49).
Metadata profile	A set of configuration parameters that define the cataloging environment you use when working in the MD Editor. See <a href="#">Configuring Cataloging</a> .
Monograph	See <a href="#">Book</a> .
Multi Campus	See <a href="#">Distributed Electronic Resources</a> .
National Union Catalogue (NUC)	Printed catalog of books from the Australia library of congress. See <a href="#">Publishing to Libraries Australia</a> .
Navigation bar	See <a href="#">Main menu</a> .
Network Zone	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 <a href="#">Managing Multiple Institutions Using a Network Zone</a> .
Non-repository citations	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 <a href="#">Adding Citations to a Reading List</a> .
Normalization rules	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 <a href="#">Working with Normalization Rules</a> .
OCLC control number / OCLC number	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> .
One-time order	An order for a one-time resource, for example, a book, a print journal, and a one-time electronic book. See <a href="#">Single order</a> .
OpenURL	A type of Uniform Resource Locator (URL) that contains the address of an OpenURL Web site combined with the item's

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	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> .
Operational Record (OPR)	An internal record, processed from MarcXML, used for different purposes, for example, for the Bibliographic Details table in Analytics. This is a normalized mapping from the different MARC formats to align them into one operational record to ease the development.
Order	See <a href="#">PO (purchase order) line</a> .
Organization unit	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 <a href="#">Library</a> .
Outgoing Request	See <a href="#">Borrowing Request</a> .
Package	A type of electronic collection whose resources can be individually managed through an interface.
Packaging	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 <a href="#">Packaging PO Lines into a PO</a> .
Patron digitization request	A request by a patron for the digitization of a resource. See <a href="#">Digitization Processing</a> .
Patron Directory Service (PDS)	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 <a href="#">Alma and Patron Directory Services</a> .
Periodical	Periodical is a broad term, meaning anything that is published periodically. It could be newspapers, magazines, newsletters or journals. See <a href="#">Journal</a> and <a href="#">Serial</a> .
Persistent menu	The top section of Alma is called the Persistent Menu. This section is always available through all Alma screens. It contains the institution logo, <a href="#">Persistence Search box</a> and <a href="#">Action menu</a> .
Persistent search box	A search box consisting of various search options. The persistent search box is always available from the top middle of any Alma page. See <a href="#">Searching in Alma</a> .
Physical	"Physical" refers to anything with a holding/item, including "Print" items (print books, print journals). Note you can have a holding without an item but not an item without a holding.
Physical Request	Request to receive an item in physical format, i.e. as a physical book.
Physical titles (search)	"Physical titles" will search all indexed fields from records with "physical" inventory
PID	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 <a href="#">Configuring Search Indexes</a> .
PMID	PubMed identifier. See more information about <a href="#">PubMed</a> .
PO (purchase	A group of PO lines sent to a single vendor. Otherwise known as an <i>order</i> . Sending a PO is known as <i>ordering</i> . For more

Term	Definition
order)	information, see <a href="#">Purchasing Workflow</a> .
PO (purchase order) line	A Purchase order line is an entity that is set to record in the system an order to acquire a resource. There are various types of Purchase Order Lines in the system for various types of materials (physical, electronic, digital and more). For more information, see <a href="#">Purchasing Workflow</a> .
PO (purchase order) line type	Also <i>purchase type</i> . Defines the type of inventory and continuity (one-time or continuous) of the PO line. For more information, see <a href="#">Explanation of Purchase Types Workflow &amp; Inventory</a> .
PO Line Owner	Unit/Library responsible for creating the order (often responsible for receiving and paying for order as well)
Policies Directory	See <a href="#">Terms of Use</a> .
Portfolio (Electronic Portfolio)	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 <a href="#">Managing Local Portfolios</a> and <a href="#">Managing Electronic Resources</a> for more information.
Primo/Primo VE	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 <a href="#">here</a> for more information on Primo. See <a href="#">here</a> for information on Primo VE.
Primo Central Index	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 and secondary publishers and aggregators, and from open-access repositories. See <a href="#">here</a> for more information.
Privileges	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 <a href="#">Managing User Roles</a> .
Process	A job run on a set of records. See <a href="#">Working with Normalization Processes</a> .
Process Type	How a resource is currently being processed (processing stage or work order type). See <a href="#">Requests in Alma</a> .
Public trial	Trial feedback may be received from a predefined trial participant group and from general users. See <a href="#">Managing Trials</a> .
Publishing	A process that extracts and formats metadata for external uses, such as for discovery in Primo. See <a href="#">Resource Management</a> .
Publishing platform	See <a href="#">General Publishing</a> .
Purchase request	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 <a href="#">Purchase Requests</a> .
Reading list	A list of citations for a specific course. See <a href="#">Managing Reading Lists</a> . Reading lists may be divided into sections.
Receiving	The process of accepting physical items shipped to the library by vendors. See <a href="#">Receiving Material</a> .
Receiving department	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

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	is listed there. In the drop-down list, make sure that the <b>Always Show Current Location</b> box is selected. In some cases, the receiving department corresponds to the PO line owner.
Receiving note	A text note intended for the receiver (receiving operator).
Record	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 included 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.
Record List	An Alma list that displays a list of Alma records. See <a href="#">Record Lists</a> .
Regular expression	A series of characters that define a search/match pattern. See MSDN's <a href="#">Regular Expression Language - Quick Reference</a> .
Reject	Lender refusal to fulfill a request.
Release and Release Update	Alma releases include new features and functionality as well as 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.
Remote storage	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 <a href="#">Requests to Remote Storage Facilities</a> .
Reporting code	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 <a href="#">Configuring Reporting Codes</a> .
Repository	<p>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).</p> <p>See <a href="#">Navigating the MD Editor Page</a> and <a href="#">Searching in Alma</a> for more information.</p>
Repository search	Alma's Repository Search gives the Alma staff user a single point of access to all forms of resources in a wide variety of business workflow contexts. searching across all types of material – print, electronic and digital. See <a href="#">Searching in Alma - Ex Libris Knowledge Center (exlibrisgroup.com)</a>
Representation	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 primary copy and another a derivative copy and can differ in format, resolution, or size. See <a href="#">Managing Digital Resources</a> .
Restrictions	Access rights policies defining who can access digital resources and to which extent.
Request	<p>A resource request (or just "request") 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.</p> <p>For more information, see <a href="#">Requests in Alma</a>.</p>

Term	Definition
Request Mediation Rules	A rule that determines whether a resource sharing borrowing will be sent automatically to a lender or require staff mediation.
Request Send Rules	See Request Mediation Rules.
Requesting Library	The resource sharing library that is requesting on behalf of a patron.
Requester	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> .
Resource request	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 request.  For more information, see <a href="#">Requests in Alma</a> .
Resource Sharing	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> .
Resource sharing partner	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> .
Resource type	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> .
Return item	Return a physical item to the library.
Rota	List of potential lenders that a borrower library assigns to a borrowing request.
Rota Assignment Rule	Automatic rules that determine the list of potential lenders that will be assigned to a borrower resource sharing request.
Rota list	A list of potential lending partners that are searched to fulfill the sharing request. See <a href="#">Resource Sharing Partners and Rotas</a> .
Rota Rules	See <a href="#">Rota Rule Assignment</a> .
Rota Template	Groups of potential lenders for fulfilling a borrower resource sharing request. Rota templates are assigned automatically to borrower resource sharing requests by rota assignment rules.
Rules Table	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> .
Scan in	See <a href="#">Check in item</a> or <a href="#">Return item</a> .
Search	See <a href="#">Locate</a> .
Search field	The Search field is a field, group of fields or metadata elements that are indexed by a search index and used by the

Term	Definition
	<p>various staff search.</p> <p>See <a href="#">Searching in Alma - Ex Libris Knowledge Center (exlibrisgroup.com)</a></p>
Search index	See <a href="#">Search field</a> .
Search Type	A search type is based on an entity (see Record) which is discrete, managed and searchable in Alma staff search. 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. See <a href="#">User Roles for Search Types</a> .
Secondary search	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> .
Selective package	An electronic collection for which the library typically will activate specific portfolios (and not the entire collection). Note that "Selective" package and "Aggregator" package behave the same when the flag "Automatically activate new portfolios" is checked in the electronic collection activation wizard. See <a href="#">Adding a Local Electronic Collection</a> .
Send Item	See <a href="#">Ship</a> .
Serial	Serial is a broad term, meaning anything that is published serially, or in a series. It is most often used to mean academic journals. See <a href="#">Journal</a> and <a href="#">Periodical</a> .
Serial Request	See <a href="#">Article Request</a> .
Service	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> .
Set	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 <a href="#">Managing Search Queries and Sets</a> . A set is either logical or itemized.
Ship	The resource sharing lender action of sending a requested resource to the requesting borrower library. The resource may be a physical resource that is physically sent, or a document that is sent digitally (as a link or as a digital file).
Shipping Costs	The library expenses for fulfilling a request, either as a borrower or as a lender.
Simple search	See <a href="#">Persistent search box</a> .
Single order	A single order, also known as "One time order" is a type of Purchase Order Line which is set to record an order to acquire a single purchase from a vendor, when the material/s arrive, the order is complete.
Sip ID	A number for a transitory set of records affected by a job. See <a href="#">Configuring Search Indexes</a> .
SIP2	A protocol from 3M that provides a standard interface between a library's automated circulation system and library automation devices. See <a href="#">Configuring SIP2 Bin Configuration</a> .
Staff search	Staff search is the general ability of library staff using Alma for searching all Search Types. Another known capability is the patron search which is referring to the ability of a patron to search in other systems than Alma.
Staff user	An individual who has permission to work in Alma. Also known simply as a user. See <a href="#">Managing Users</a> .

Term	Definition
Submit	The action of depositing digital material to Alma, either by staff, automated jobs or end users.
Subscription	A subscription, also known as "Continuous order" is a type of Purchase Order Line that is set to record an order to acquire multiple items over a defined period of time (journals for example), when the material/s arrive, the order will "wait" for the next resource in the sequence to arrive. The order will be complete once the subscription date defined on the order will arrive.
Summary funds	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 <a href="#">Managing Funds and Ledgers</a> .
Supplying Library	The lending library that fulfills the request, either in physical form or in digital form.
Suppress	Mark a record to prevent it from discovery. See <a href="#">Suppress from Discovery</a> for more information.
Target	An electronic collection in Alma terminology. See <a href="#">Electronic collection</a> above. For more information, see the documents under <a href="#">Alma and SFX</a> .
Task	An operation waiting for manual user intervention. See <a href="#">Tasks in the Task List</a> . Alternatively, a single step in a process, such as a normalization process. See <a href="#">Working with Normalization Processes</a> .
Task list	A list of user tasks appearing in the persistent menu. See <a href="#">Tasks in the Task List</a> .
TAX	Tax, also known as VAT, is a compulsory financial charge associated to invoices. Invoices can have the tax associated to it in 3 main ways: <ul style="list-style-type: none"> <li>• Inclusive: The invoice total amount includes VAT.</li> <li>• Exclusive: VAT is added above the invoice total amount.</li> <li>• Line Exclusive: The invoice's total amount includes VAT (similar to Inclusive), but the VAT amount is calculated outside of the invoice lines' total value and is not factored into the individual invoice lines.</li> </ul> For more information, see <a href="#">Creating Invoices</a> .
Terms of Use	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 <a href="#">Configuring Terms of Use</a> .
Title	See <a href="#">Bibliographic record</a> .
Title Search	See <a href="#">Repository search</a> .
Transaction	A financial activity that may impact the fund's balance. See <a href="#">Performing Fund Transactions</a> .
Transit Slip	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 <a href="#">Managing the Hold Shelf</a> .
Transit time	The time it takes for a physical item to make it from one location to another. See <a href="#">Configuring Transit Time Rules</a> .
Trial	An instance of an evaluation of a resource before purchasing it. See <a href="#">Managing Trials</a> .
UI	See <a href="#">UX</a> .
Unfill	See <a href="#">Reject</a> .

Term	Definition
Unified resource management (URM)	The Ex Libris resource management framework that allows libraries to optimize technical support, purchasing power, collections, and staff knowledge and resources. See <a href="#">The URM Vision</a> .
Update Inventory	The process of loading enhanced-cataloging records
User	A person with an Alma user account: a staff user, an instructor, or a patron. See <a href="#">User Management</a> .
User blocks	Flags on a user's account that can prevent various fulfillment activities such as requests or loans. See <a href="#">Blocking and Unblocking Users</a> .
User role profiles	A predefined group of roles (including scopes) that may be attached to users in one action. See <a href="#">Configuring Role Profiles</a> .
User roles	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 <a href="#">Managing User Roles</a> .
UX	In general, people use user interface (UI) design and user experience (UX) design interchangeably. However UI is part of the broader term of UX. UX include the following criteria a UI should address: Useful, Usable, Desirable, Findable, Accessible, Credible, Valuable. See <a href="#">User Experience Design (semanticstudios.com)</a>
VAT	See <a href="#">TAX</a> .
Vendor	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 <a href="#">Managing Vendors</a> .
Vendor account	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 <a href="#">Managing Vendors</a> .
Vendor Code	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.
Vendor interface	A collection of electronic collections offered by a vendor. A vendor interface is also known as a platform. See <a href="#">Managing Vendors</a> .
Vendor invoice number	A number assigned to all PO lines uploaded from the same invoice file from an EOD. See <a href="#">Embedded Order Data (EOD) Field Mapping</a> .
Viewer	A service delivering digital content to end users, displaying digital files, metadata, copyright statement and more.
Vocabulary	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 <a href="#">Configuring Controlled Vocabulary Registry</a> .
Widget	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 <a href="#">Managing Widgets</a> .
Work order	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 <a href="#">Managing Requests and Work Orders</a> .
Z39.50	A client-server protocol for searching and retrieving information from remote computer databases. See <a href="#">Z39.50 Search</a> .