



# Alma Glossary

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# Alma Glossary

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This section contains a glossary of terms used in Alma.

<b>Access rights</b>	The area in Fulfillment configuration where permissions are granted to patrons that allow them to access digital and electronic resources.
<b>Access rights checker</b>	A plug-in component that determines access rights and restrictions for a user regarding a particular resource.
<b>Activation</b>	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 the public has access.
<b>Administrative/consortial structure</b>	The hierarchical structure of management within Alma. The levels are Consortium, Institution, and Library.
<b>Aggregator package</b>	A type of electronic collection that includes all titles (as opposed to a selective package, which includes only some of the collection's titles).
<b>Alerts</b>	Messages or warnings found throughout Alma that direct users to actions that need attention, for example: "Items already exist in the repository."
<b>Alma Menu</b>	Lists all of the actions and areas that a user can work in depending on what role(s) they have been assigned.
<b>Analytics</b>	The tool used to manage data reports and the dashboard.
<b>Analysis</b>	The querying option within Analytics that allows a user to create a report.

<b>Assignments</b>	The tasks or records worked on by operators. Assignments can be the responsibility of the user who is logged in, of others, or they can be unassigned. Assignments may be changed if the appropriate permissions allow this.
<b>Attachment</b>	A file that is associated with an entity at the system level, is stored in the system, and can be accessed from the entity details.
<b>Audit Event</b>	A logged action taken in the system. The event includes the user that took the action and the time the action was taken.
<b>Auditing</b>	Reviewing the actions taken on a record or entity.
<b>Available balance</b>	The money that is available for use in an allocated fund. [Available balance] = [allocated amount] - [encumbrances] - [expenditures]
<b>Boilerplate statement</b>	The copyright statement presented to users depositing items.
<b>Brief Record</b>	A bibliographic record that is identified as brief by an equation that considers the values of various fields of the record. For details, see <b>Identifying brief records</b> in the <i>Alma Resource Management Guide</i> .
<b>Campus</b>	A collection of buildings that belongs to a given institution. Users 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.
<b>Cash balance</b>	The money that is currently in the fund/ledger. [Cash balance] = [allocated amount] - [expenditures].
<b>Catalog</b>	The catalog contains all descriptive metadata managed by a library, institution, consortium, or community. This may include private descriptive metadata for a library, institution, or consortium or may reference descriptive metadata contained in the Community Catalog.

<b>CKB</b>	Central Knowledge Base within the Community Zone.
<b>CKB package</b>	A collection of electronic portfolios (titles) made available from one provider.
<b>Cloud computing</b>	The delivery of software and storage of data at a location (a server) remote from the physical location of the library, accessed by the internet.
<b>Collaborative Network (CN)</b>	The overarching concept for all types of collaboration (for example, cataloging, acquisitions, fulfillment) between libraries and institutions. In Alma, it is used particularly when referring to a consortium model of collaboration.
<b>Collection</b>	An entity that groups any number and type of resources together as a database or package, allowing for enhanced organization of mixed-type materials based on topic-based hierarchical structures.
<b>Community Catalog (CC)</b>	<p>A catalog of bibliographic records in the Community Zone for the use of the Alma Community.</p> <p>Can be accessed by any institution that is part of Alma for cataloging purposes.</p> <p>For information on its scope, standards, policies, and merge logic, see <i>Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities</i>.</p>
<b>Community Zone (CZ)</b>	<p>The Alma Community Zone. Incorporates the Knowledge Base, a Community Bibliographic Catalog, and Global Authority Files.</p> <p>Can be accessed by any institution that is part of Alma for Acquisitions and Collection Development purposes.</p>
<b>Context object</b>	A metadata container that holds attributes pertaining to the OpenURL.
<b>Context service</b>	A container of potential services collected according to specific attributes.

<b>Controlled Vocabulary (CV)</b>	An organized set of pre-defined, authorized terms. One example is the Library of Congress subject headings.
<b>Copyright clearance</b>	The process of getting permission to use copyrighted works. A digitization process may require performing copyright clearance.
<b>Dashboard</b>	The opening page of Alma after a user signs in. Its contents vary according to a user's role. The dashboard may include reports, widgets, and a task list.
<b>Database</b>	Formerly, a collection whose resources cannot be individually managed through an interface. Currently, the term and its functions are being combined with those of "package" to allow for more flexibility in both functionalities. Eventually, "database" and "package" will be deprecated and "electronic collection" will cover both entities.
<b>Delivery</b>	The process of taking a request for a digital item and enabling the user who requested it to view or access a copy.
<b>Delivery rules</b>	Rules that determine how digital content is delivered to users and external systems. The rules are configurable by the customer.
<b>Department</b>	An area in the library where dedicated physical inventory actions take place, such as receiving acquired physical material and digitizing physical material.
<b>Deposit flow</b>	The process of making digital material part of the institution's permanent inventory.
<b>Descriptive Metadata (DMD)</b>	Descriptive Metadata. Typically, DMD appears in records in the <b>Metadata management system (MMS)</b> .

<b>Digital resource</b>	A file or group of files with metadata that exists on a local network, a server, or cloud. It may include, among other possible formats, streaming media, e-books, or .jpg images. Digital resource files can be stored and managed externally, but the metadata is always managed by Alma. The resource generally requires a viewer on the user's machine.
<b>Digitization approval</b>	The process of approving a digitization request. The process may include receiving copyright clearance from the proper agencies
<b>DLF Electronic Resource Management Initiative (DLF ERMI)</b>	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.
<b>Domain-normalized XML (DNX)</b>	A normalized version of inventory-related metadata that is not bibliographic (for example, material type for the Title/Resource level or the policy, location, or barcode for the item level).
<b>DNX representation</b>	The complete record of the inventory in the DNX XML including the attributes contained in ORACLE tables.
<b>Document delivery</b>	The supply of journal articles, chapters, and other digital items to individuals who make requests.
<b>Drools</b>	A business rules management system based on the JBOSS Rules engine. Drools are used for automated, rule-based updates to metadata.
<b>Electronic collection</b>	<p>A collection of electronic resources that can contain portfolios, bibliographic records, linked URLs, or any combination thereof.</p> <p>Combines the former separate entities, "packages" and "databases," which are being phased out.</p>

<b>Electronic Data Exchange (EDX)</b>	A file delivery method for the transfer of data by standard File Transfer Protocol (FTP) whereby OCLC provides an Electronic Data Exchange account into which OCLC posts bibliographic records and reports.
<b>Electronic resource</b>	A digital object that is stored and managed externally from the local library or Institution Zone.
<b>Embedded order data (EOD) record</b>	Vendor-supplied fields that describe the library's order for a resource. (Referred to 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.
<b>EOD import profile</b>	A software component that takes fields from a source record and maps them to a normalized PO line structure. Each profile may have an EOD import syntax check associated with it.
<b>Enhancement</b>	A tool within the metadata editor that allows normalization rules to be applied and thus improves the quality of the record.
<b>Event</b>	An action that involves at least one entity or agent in the system. Used for audit trail purposes.
<b>External system</b>	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).
<b>External user management</b>	A model whereby an external system is treated as the authoritative source for user information. External user data is considered owned by the external system and is read-only in Alma.
<b>Facets</b>	Facets are used in search results lists to allow sorting and reduction of the results. For example, order lines may be filtered by fund, location, or digital format.
<b>Form editor</b>	A page that is accessible from the metadata editor and allows one to edit or add fixed fields.



<b>Fulfillment plan</b>	A series of automated steps that facilitate making a requested resource available at the time and location that has been requested. See also <a href="#">Smart request</a> .
<b>Fulfillment unit (FU)</b>	A number of shelving locations with similar fulfillment policies and blocks.
<b>Headings file</b>	A file containing the collection of all the headings in all the bibliographic or authority records, with references to the records where they are used. Headings from bibliographic and authority records are managed separately, in different headings files.
<b>ILL incoming (lending) request</b>	See <a href="#">Resource sharing incoming (lending) request</a> on page 16.
<b>ILL outgoing (borrowing) request</b>	See <a href="#">Resource sharing outgoing (borrowing) request</a> on page 16.
<b>Interface</b>	In Alma, interfaces refer to vendor interfaces—that is, sites maintained by the vendor—only.
<b>Institution Zone (IZ)</b>	The area of the Metadata Management System comprising local institutional data such as locally managed bibliographic records, locally activated electronic portfolios, local physical holdings. Paired with the Community Zone, which contains globally shared data.
<b>Institutions</b>	A group of libraries managed together. For example, a university may be an Institution consisting of a main library, a science library, a business library, and several specialized libraries.
<b>Integration profile</b>	A mechanism for integrating the import and export processes between Alma and an external system.
<b>Intellectual entity (IE)</b>	A resource that is being managed and described in the Alma system. An IE may have one or more holdings or digital representations.

<b>Internal user management</b>	A model whereby the user information is managed wholly within Alma.
<b>Inventory</b>	The resources that are owned or licensed by or associated with a particular library, institution, or consortium. All descriptive bibliographic metadata resides in the Metadata management system (MMS) with appropriate links from the inventory to the corresponding descriptive information.
<b>Invoiced but not paid balance</b>	Invoices that have a “ready” status but have not been paid yet (based on the invoice status).
<b>Item</b>	The inventory level of a resource for fulfillment and usage. Items may include bar codes and other identification details.
<b>Itemized set</b>	A group of objects whose set members are determined at the time the set is saved. 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 <b>Logical set</b> .
<b>Job</b>	A scheduled or on-request process.
<b>Library</b>	<p>The lowest level in the hierarchical structure of management within Alma, which is: Consortium, Institution, and Library. An institution can consist of a number of libraries—physical locations that are normally housed at a single building or in a couple of buildings in close proximity of one another, such as a Main Library, a Science Library, a Law Library, and so forth.</p> <p>A library has locations and circulation desks that are well-known to the library patrons.</p>
<b>Loan</b>	An issue of a resource to a user (patron). Formerly referred to by some institutions as <b>issue</b> .
<b>License management</b>	The management of a contract between the library and a vendor for the lease of one or more copyrighted bibliographic databases or online resources. This includes creating, updating, and deleting licenses.

<b>Limited trial</b>	<p>An e-resources trial type.</p> <p>This trial is limited to a group of defined trial participants. They are the only ones that have access to the resource during the trial.</p>
<b>Local catalog</b>	Materials managed locally within Resource Management
<b>Location</b>	A physical place where items are stored (for example, a shelving location).
<b>Logical set</b>	A group of records whose members are determined by a query. The set updates every time it is run based on the most current results of the query. See also <b>Itemized set</b> .
<b>Management tags</b>	Can be set from within the metadata editor to suppress records from the discovery layer, to export to WorldCat, or to indicate that the record is brief.
<b>MARC record</b>	A record conforming to machine readable cataloging (MARC).
<b>Match method</b>	The approach Alma uses to identify duplicate records. When a record is loaded into the Alma database, the system attempts to find a similar record based on the match method.
<b>Material type</b>	<p>The type of material, such as a book or electronic journal package, 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. An item material type manifests itself in Primo's Get It/Details tabs.</p> <p>Material types are system-defined and cannot be configured through the Alma interface.</p>
<b>MD</b>	Metadata
<b>Metadata editor</b>	The tool for editing and creating bibliographic and holdings records in Alma
<b>Metadata form</b>	A form used to fill in metadata information regarding a deposited object. May be used for a PO line description.

<b>Metadata import profile</b>	A metadata profile used for importing records. An import profile may store embedded or inventory data.
<b>Metadata management system (MMS)</b>	The interfaces, functions, and data that define institutional systems and allow them to manipulate their descriptive metadata. The MMS includes a Community Zone and a Library Zone.
<b>Metadata profile</b>	A set of configuration parameters that define the applicable fields, subfields, indicators, fixed positions and their values (if needed) for a metadata schema.
<b>Metadata registry</b>	The repository for information about all metadata schemas supported by Alma. It can include Marc 21 Bibliographic, Marc 21 Holdings, Marc 21 Authority, and Dublin Core. The registry is the basis for a variety of data services such as validation, normalization, and mapping.
<b>MMS Management Tags</b>	Tags attached to each MMS record that define attributes to be used for further management of the record, such as exporting, publishing, and enhancing.
<b>Network Zone (NZ)</b>	<p>The area where shared data (such as catalog, licenses, and e-resources) is managed and is required for certain Collaborative Network functionality.</p> <p>Can be accessed by any institution that is part of a cataloging or acquisitions network. Specific cases include shared catalog and joint acquisitions management.</p>
<b>Non-bibliographic item</b>	An item that is not classified as a bibliographic item but that needs to be managed by the system. Usually, this is a physical item (such as a computer) that is bought for the library.
<b>Non-repository citations</b>	Titles that are used for a course's reading list, with no link to the institution's inventory. These are typically faculty resources that are not part of the institution's inventory. See <a href="#">To add a non-repository citation</a> : on page 221.

<b>Normalization rules</b>	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, via bulk import and as part of the global update process
<b>OCLC holding library code</b>	Identifies a collection or campus under an OCLC symbol.
<b>OCLC symbol</b>	A unique identifier assigned by OCLC to member and participating institutions.
<b>OpenURL</b>	A type of Uniform Resource Locator (URL) that contains the address of an OpenURL Web site combined with the item's identification. The OpenURL Web site serves as a resolver and finds the physical address of the item and returns it to the user's browser.
<b>Organization unit</b>	A library which can be configured for fulfillment and which controls the fulfillment unit collections under its control.
<b>Out-of-the-box (OTB/OOTB)</b>	The features, settings, and configurations that come with the installation of a product and are available as soon as the product has been installed.
<b>Package</b>	Formerly, a collection of portfolios from a specific data provider. (Analogous to SFX KB target.) Currently, the term and its functions are being combined with those of "database" to allow for more flexibility in both functionalities. Eventually, "package" and "database" will be deprecated and "electronic collection" will cover both entities.
<b>Packaging</b>	An automated method by which PO lines are passed through normalization and validations and are brought together into a purchase order, ready for approval.
<b>Patron digitization request</b>	A request by a patron for the digitization of a resource.

<b>Patron Directory Service (PDS)</b>	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. Rather, it is configured to work with the institution's authentication server(s) and user database(s), such as an LDAP directory service.
<b>Patron services area</b>	A portion of Alma used by library staff to perform fulfillment functionality (loans/transactions, requests) on behalf of a patron.
<b>Persistent search box</b>	A drop-down search box consisting of various search options. The persistent search box is always available from the top middle of any Alma page.
<b>Plug-in</b>	A software module that adds a specific feature or service to a larger system.
<b>Plug-in manager</b>	An infrastructure component for installing and managing plug-ins.
<b>Policies</b>	Stipulations of a Terms of Use contract.
<b>Policy type</b>	Specifies the policy influence area (for example, due dates or fines).
<b>Portfolio (Inventory)</b>	The specific coverage, services, and link information relevant for a particular title within a package. May include administrative/access information. May be local or global. Analogous to SFX KB Object Portfolio.
<b>Privileges</b>	The discrete permissions that make up a user role. For example, editing rights to metadata records.
<b>Public trial</b>	<p>An e-resource trial type. In the public trial, the resources are part of the library collection and are available to all end users.</p> <p>Trial feedback may be received from a predefined trial participant group and from general users.</p>

<b>Publishing</b>	A process that extracts and formats metadata for external uses, such as for discovery in Primo.
<b>Purchase order line type</b>	Also goes by <i>PO line type</i> and <i>purchase type</i> . Defines the type of inventory and continuity (one-time or continuous) of the PO line. For more information, see the following table in the <i>Alma Acquisitions Guide: Repository Search, Recommended Purchase Types, Workflow &amp; Inventory</i> on page 16.
<b>Reading lists</b>	List of resources (physical, digital, and/or electronic) and the applied workflows associated with them that are reserved for use for a specific course.
<b>Receiving</b>	The process of accepting physical items shipped to the library by vendors.
<b>Remote storage</b>	Off-site storage. A location that is used to store physical library materials at a distance from the library. Remote storage can be shared by a number of institutions and managed by a system other than the institution's library system.
<b>Reporting code</b>	An attribute of a PO line or invoice line that codes a type of material within the ledger and fund system. For example: monograph, ejournal. This allows reporting on funds by attributes other than the funds hierarchy.
<b>Requester</b>	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.

<b>Resource request</b>	<p>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, such as:</p> <ul style="list-style-type: none"> <li>■ Moving items to reserves</li> <li>■ Sending items out to the bindery</li> <li>■ Sending items to digitization</li> </ul> <p>Resource requests vary in:</p> <ul style="list-style-type: none"> <li>■ The requester type (patron, library, department)</li> <li>■ The resource format (physical/digital)</li> <li>■ The delivery method (move physical item to a location, send link to a digital resource, and so forth)</li> </ul>
<b>Resource sharing incoming (lending) request</b>	A request placed by another institution's patron and fulfilled by a resource of the local institution.
<b>Resource sharing outgoing (borrowing) request</b>	A request placed by local patron and fulfilled by another institution's resource.
<b>Resource sharing partner</b>	An institution or a distinct external ILL system that participates in a resource sharing process, either as borrower or as lender.
<b>Role parameter</b>	A role modifier or limiter. For example, a Circulation Desk Operator who is permitted to operate only at a specific Circulation Desk.
<b>Selective package</b>	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).
<b>Service unit</b>	A unit that provides services to other organizational units. It may have staff users, a physical (billing) address, departments, a circulation desk, funds, and other objects associated with it.



<b>Services registry</b>	A list of actions that may be performed on metadata records. Each action is a service, and services may be grouped together for bulk data updates.
<b>Set</b>	A physical group of objects created in one of two ways, through an <b>Itemized set</b> or a <b>Logical set</b> .
<b>Set management</b>	Activities performed by authorized staff users that involve creating and administering logical and itemized sets.
<b>Set member</b>	A bibliographic record or inventory item that belongs to an itemized set or the output of a logical set's query.
<b>SIP2</b>	A protocol from 3M that provides a standard interface between a library's automated circulation system and library automation devices.
<b>Smart request</b>	Patron requests for library materials that are satisfied by providing the most appropriate resources to a patron across resource types, locations, formats, and preferences. See also <b>Fulfillment plan</b> .
<b>Staff user</b>	An individual who has permissions to work within Alma.
<b>Summary funds</b>	Funds that are used for aggregate reporting on the subordinate (child) funds. They are not used for ordering or invoicing.
<b>Synchronization</b>	A process that ensures that data in Alma is updated, at relevant times, with the latest values from the owner of the data.
<b>Task</b>	An operation performed within Alma that moves the item along in its lifecycle, for example: approve a PO line.
<b>Task chain</b>	An ordered list of tasks.

<b>Task list</b>	A list of action items requiring a staff user to take some action on a resource in order to move it forward in its lifecycle. For example, a PO line may need to be manually approved before it can be automatically sent.
<b>Terms of Use (TOU)</b>	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. (TOU can be referred to as the “contract” between the library and the patrons).
<b>TOU type</b>	Terms of Use that can be assigned to a specific type of a fulfillment activity (such as Loans).
<b>Transaction</b>	A financial activity that may impact the fund’s balance.
<b>Transaction Entry</b>	A component of a transaction header that affects the balance of a single fund.
<b>Transaction Entry Type</b>	The reason for a transaction entry that is changing a fund balance. A transaction entry type could be an allocation, an encumbrance, or an expenditure.
<b>Transaction Header</b>	An action with all its entries that makes up a complete business action, affecting the balances of one or more funds.
<b>Transit Slip</b>	A printed slip attached to a physical item that is placed in transit. The slip identifies the requested material and its destination.
<b>Transit time</b>	The time it takes for a physical item to make it from one location to another.
<b>URD(2)</b>	Universal Resource Discovery (and Delivery). The Ex Libris framework for end-user services that focuses on search, delivery, and other library services. Offerings such as Primo are part of the URD2 framework.

<b>U-Resolver</b>	Alma's fulfillment engine 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 U-Resolver responds to OpenURL requests as well as requests from systems such as Primo.
<b>URL</b>	Uniform Resource Locator. A path to a file stored on the Internet or on an internal network.
<b>URM</b>	Unified resource management. The Ex Libris resource management framework that allows libraries to optimize technical support, purchasing power, collections, and staff knowledge and resources. Alma is based on a URM framework.
<b>User</b>	An individual who interacts in some way with the system. A user may be a staff member such as a Cataloger or Circulation Desk Operator or a patron interacting with resources through a discovery interface.
<b>User blocks</b>	Flags on a user's account that can prevent various fulfillment activities such as requests or loans.
<b>User management/ maintenance</b>	An area of Alma designed for managing users and contacts.
<b>User record</b>	The collected information stored in Alma about a user. This user may be a student, an Alma operator, faculty, staff member, or organization. The record consists of a core set of information plus repeatable segments for such items as multiple addresses.
<b>User registration</b>	The process of defining a person as an authorized user of the system. Registration may be performed at the Circulation Desk, online using the user management system, or through user import options.

<b>User role</b>	A grouped set of rights assigned to an Alma user that grants privileges and tasks. Roles are based on expected workflows and job responsibilities in Alma. The rights bundled within individual roles (e.g., "Licensing Manager") are not editable by individual institutions. However, a single user record may mix and match different roles to create the appropriate set of staff rights.
<b>User role templates</b>	A predefined group of roles (including scopes) that may be attached to users in one action.
<b>User segment</b>	A repeatable section of the user record with grouped information. Examples are addresses, phone numbers, e-mail addresses, notes, and blocks.
<b>User-submitted job</b>	A combination of a task chain and a set of resources that the task chain will run on, initiated by the user.
<b>Vendor account</b>	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.
<b>Versioning</b>	Sequentially numbering committed updates to a record for the purposes of retrieval and rollback. This applies to MARC records in the metadata editor.
<b>Vocabulary</b>	A specified list of terms developed by creators of catalogs and databases to ensure precise and comprehensive searching. The terms chosen may vary from database to database. In Alma, each vocabulary has its own code and name.
<b>Widget</b>	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.

<b>Work order</b>	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.
<b>Z39.50</b>	A client-server protocol for searching and retrieving information from remote computer databases.

