

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

Alma Consortia Management and Administration

Erez Shabo
Alma Product Team

Agenda



Types of Collaborative Networks



Consortia Central Office Benefits



New Features



Central Office Enhancement Plan



Central Configuration Prototype

The background features a circular arrangement of interlocking puzzle pieces. The pieces are light blue and white, set against a gradient background that transitions from a deep blue on the left to a light green on the right. The puzzle pieces are arranged in a circular pattern, with some pieces missing or slightly offset, creating a sense of incompleteness or a process in progress.

**How do we make the whole
greater than the sum of its parts?**

Types of Collaborative Networks



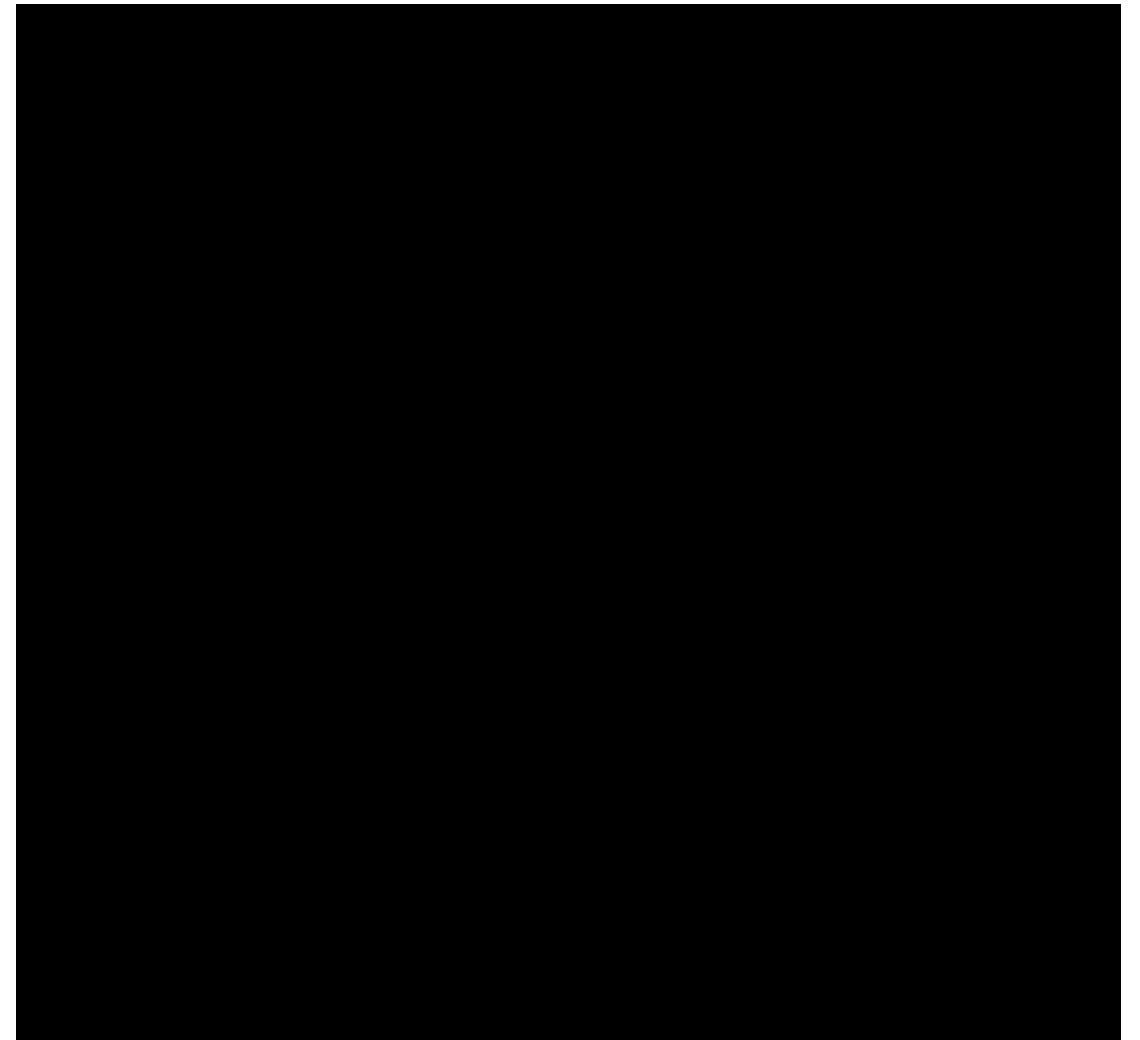
Collaboration for Patron Services

- Shared Discovery (Primo VE)
- Resource Sharing
- Fulfillment



Collaboration for Technical Services

- Shared Catalog
- Joint Acquisitions
- Analytics
- Administration



Collaboration for Patron Services

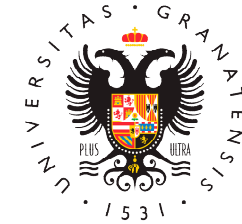


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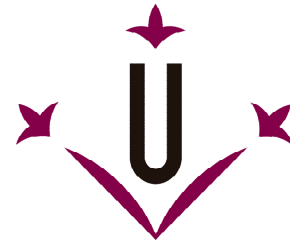


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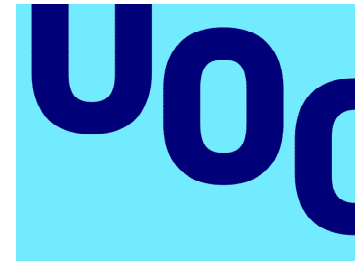


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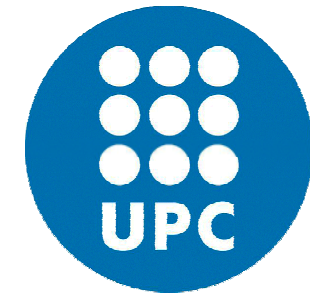
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de Girona



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Oberta
de Catalunya



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upf. Universitat
Pompeu Fabra
Barcelona



University
of Seville

Collaboration for Technical Services

Network Zone



CATALOGING

Shared
Catalog



ACQUISITIONS

Joint Acquisitions
and Negotiations



ANALYTICS

Shared Reporting
and Analysis



ADMINISTRATION

Central
Administration,
Configuration



How is the Network Zone Managed? What is a Central Office?

Consortia Central Office Benefits

- Capacity and expertise of system librarians to take full advantage of Alma
- Unified configuration
- Centralized decision making
- Distributing unified workflow for all institutions
- Unified user experience
- Consortia-level top-down initiatives



Which New Features Enhance the Consortia Experience?

Available Consortia Features

- Joint Inventory Use

- Cataloging Level Definition at Import Phase

- Exclude Member Local Bib Records from NZ Publishing

- Item Retention

- Restrict Editing of Network Zone Metadata Fields

Joint Inventory Use

[←](#) Edit Physical Location

Physical Location Details

Code * SHARED

Name *

Type *

Fulfillment Unit

External Name


Remote Storage

Map

Physical Location Circulation Desks List

Name

[Attach New Circulation Desk](#) [Attach Existing Circulation Desk](#)


No records were found.

Holdings Configurations

Accession Placement

Call Number Type

Suppress from Discovery

Discovery Priority

Host Location Configurations

Set inventory in host location [?](#)

Cataloging Level Definition at Import Phase

Import Profile Details Save Draft Cancel Save

Profile Details | Normalization & Validation | Match Profile | **Set Management Tags** | Inventory Information

Set management tags for all the records imported using this profile

Suppress record/s from publish/delivery <input type="checkbox"/>	Condition	Only for new records
Suppress record/s from external search <input type="checkbox"/>	Condition	Only for new records
Synchronize with OCLC <input type="text" value="Don't publish"/>	Condition	Only for new records
Synchronize with Libraries Australia <input type="text" value="Don't publish"/>	Condition	Only for new records
Set record/s cataloging level <input type="checkbox"/>	Cataloging level	<input type="text" value="Look-up or select"/> [00] Default Level [20] Beginner Level [60] Intermediate Level [90] Expert Level



Exclude Member Local Bib Records from NZ Publishing

← Publishing Profile Details 1 2 3 Cancel Back Save

Member Details Enrichment Add Members Information

Local Bibliographic Enrichment Add Member Local Fields

Members

Activate Selected Deactivate Selected  

<input type="checkbox"/>	Member Code	Member Name	Active	Exclude Local Bibliographic Records
1. <input type="checkbox"/>	TRAINING_MEMBER1_CLEAN	Training - Member 1 - Clean	<input type="checkbox"/>	<input type="checkbox"/>
2. <input type="checkbox"/>	TRAINING_MEMBER2_CLEAN	Training - Member 2 - Clean	<input type="checkbox"/>	<input type="checkbox"/>

Item Retention

← List of Items Back

1 - 3 of 3 Sort routine ▾ 0 rows selected Manage Selected ▾

▼ Status : All ▾ Library : All ▾ Location : All ▾ Year : All ▾ Volume : All ▾ Description : All ▾ Receive Date : All ▾

<input type="checkbox"/>	Barcode	Library	Location	Call Number	Committed to Retain	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type	Access Number	Receiving date	
1 <input type="checkbox"/>	39031010469112		Art Stacks	NA1053.B69 P413 1974	Yes	-	-	-	-	No	Item in place	-	-	-	
2 <input type="checkbox"/>	39031013584933		Offsite Collection (NEDL NOAC)	NA1053.B69 P413 1974	Yes	-	-	-	-	No	Item in place	-	-	-	
3 <input type="checkbox"/>	39031010467215		Offsite Collection (NEDL NOAC)	NA1053.B69 P413 1974	Yes	-	-	-	-	No	Item in place	-	-	-	

1 Étienne-Louis Boullée (1728-1799); theoretician of revolutionary architecture. [Translated from the French by James Emmons.] Edit Item Request ...

MMS ID: 0010657380001021
Committed to Retain:
 Montclos, Jean-Marie. (New York, Braziller [1974])

Barcode: 39031010469112
Library: Bapst
Creation Date: 13/09/2021 20:28:39 PM IDT
Modification Date: 05/10/2022 18:22:51 PM IDT
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Permanent Location: Art Stacks

Call Number: NA1053.B69 P413 1974
Call Number Type: Library of Congress classification
Status: Item in place
Due back: -
Material Type: Book

Item ID: 23550102300001021
Holdings ID: 22550102320001021

[Other details](#)



Restrict Editing of Network Zone Metadata Fields

The screenshot shows a library catalog record for 'Environmental history.' (993122160000191). The record is displayed in a table-like format with various metadata fields. Two red boxes highlight specific fields: one for 035 fields and another for 650 fields. Green lines connect these boxes to callout text on the right.

Field	Value
032	\$\$a 205020 \$\$b USPS
035	\$\$a (Aleph)000769207BCL01
035	\$\$a (OCoLC)ocm33092825
035 9	\$\$a AEX1839
037	\$\$b Environmental History, 701 Vickers Ave., Durham, NC 27701 \$\$c \$45.00 (institutions)
040	\$\$a NSD \$\$c NSD \$\$d HUL \$\$d DLC \$\$d WAU \$\$d DLC
042	\$\$a nsdp \$\$a lc
049	\$\$a BXMM
050 1 4	\$\$a GE1 \$\$b .E585
082 1 0	\$\$a 333 \$\$2 12
210 0	\$\$a Environ. hist.
222 0	\$\$a Environmental history
245 0 0	\$\$a Environmental history.
246 1 3	\$\$a EH
246 1 0	\$\$a E.H.
260	\$\$a Durham, N.C. : \$\$b American Society for Environmental History and Forest History Society, \$\$c 1996-
300	\$\$a v. : \$\$b maps ; \$\$c 23 cm.
310	\$\$a Quarterly
362 0	\$\$a Vol. 1, no. 1 (Jan. 1996)-
500	\$\$a Title from cover.
530	\$\$a Also available on microfilm from University Microfilms.
650 0	\$\$a Human ecology \$\$v Periodical7
650 7	\$\$a Environmental protection \$\$v Periodicals. \$\$2 NLI
650 0	\$\$a Conservation of natural resources \$\$x History \$\$v Periodicals.
710 2	\$\$a American Society for Environmental History.
710 2	\$\$a Forest History Society.
780 0 4	\$\$t Environmental history review \$\$x 1053-4180 \$\$w (DLC) 91649680 \$\$w (OCoLC)22195612
780 0 4	\$\$t Forest & conservation history \$\$x 1046-7009 \$\$w (DLC) 90642572 \$\$w (OCoLC)20496086
948	\$\$a LTI 08/08/2000

Restricted 035 fields

Restricted 6XX fields linked to NLI



What are Our Plans to Enhance the Consortia Experience?



Working Together

- Established consortia focus groups
- Focus groups provided requirement consolidated document
- Thorough analysis conducted by Ex Libris
- Focus areas were identified
- Built consortia roadmap for 2024

Consortia

◀ Analytics and Insights | Digital Resource Management ▶

[Return to Alma Roadmap Highlights Overview](#)



Consortia

Overview

Alma supports consortia by providing a platform for working together and sharing resources, while allowing members to independently and separately manage their own library needs.

Roadmap

2024 H1	2024 H2
<ul style="list-style-type: none">• Central Configuration By Central Office• Control Imports to Network Zone• Display Logic Rules for Shared Electronic Resources Managed in the Network Zone• Order of Shared Electronic Resources Managed in the Network Zone	<ul style="list-style-type: none">• Blocks Across a Network• Real-Time Update of Linked Accounts• User Groups in a Fulfillment Network

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Central Configuration Plan

- Centralized “one stop shop” dashboard
- Configuration management
- Distribution in a real time
- Selective distribution
- Central configuration mode
- Distribution of additional configurations



Prototype Demo

Press esc to exit Fullscreen mode

Welcome, Staff, Ex Libris | 03/09/2023

- Recent Pages
- Run a Job Administration
- Publishing Profiles Discovery
- Manage Import Profiles Acquisitions
- Monitor and View Impo... Acquisitions
- Monitor Jobs Administration

Organization Calendar

Select Library/Institution

Boston College

September 3 Sunday 01:00 - 23:59	September 4 Monday 01:00 - 23:59	September 5 Tuesday 01:00 - 23:59	September 6 Wednesday 01:00 - 23:59
--	--	---	---

[View Full Calendar](#)

Discovery Search

Search anything...

Sandbox(es)

This widget has been deprecated.


Consortia Member Links

Select Institution:

Scheduled Jobs Status

03/09 02/09 01/09 31/08 30/08

- Acquisition →
- Administrati... →
- Analytics →
- Data services →
- Discovery →
- Fulfillment →
- Import →
- Publishing →
- Repository →
- Users →



Scheduled Jobs Completed Successfully

[More Info >](#)

- Alma
- Market
- Acquisitions
- Resources
- Research
- Discovery
- Fulfillment
- Admin
- Analytics
- Show MDE
- Configuration

-  Alma QA
-  Acquisitions
-  Resources
-  Discovery
-  Fulfillment
-  User Management
-  General
-  Analytics
-  Network Zone



Back



Configuration dashboard

Click on any link from the configuration menu on the left to start working.



- Alma QA
- Acquisitions
- Resources
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- User Management
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Consortia Configuration Management

- Acquisitions**
- Administration
- Fulfillment
- Resource Sharing
- User Management
- Discovery
- Services

Configuration Area

You are now configuring : Training - Network Zone - Clean

Acquisitions ▾

[Terms of Use](#)

[Fulfillment Units](#)

[General Electronic Services](#)

[Policies](#)

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Administration ▾

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Fulfillment ▾

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Resource Sharing ▾

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Consortia Co

Network Zone

Institution 1

Institution 2

Management

- Acquisitions**
- Administration
- Fulfillment
- Resource Sharing
- User Management
- Discovery
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Configuration Area

You are now configuring : Training - Network Zone - Clean

Acquisitions ▾

Terms of Use	Fulfillment Units	General Electronic Services
Policies	Fulfillment Unit Rules	General Electronic Services Rules
Display Logic Rules		

Administration ▾

Terms of Use	Fulfillment Units	General Electronic Services
Policies	Fulfillment Unit Rules	General Electronic Services Rules
Display Logic Rules		

Fulfillment ▾

Terms of Use	Fulfillment Units	General Electronic Services
Policies	Fulfillment Unit Rules	General Electronic Services Rules
Display Logic Rules		

Resource Sharing ▾

Terms of Use	Fulfillment Units	General Electronic Services
------------------------------	-----------------------------------	---

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Consortia Configuration Management

- Institution 1
- Main Library
- Law Library
- Medical Library

- Acquisitions
- Administration
- Fulfillment
- Resource Sharing
- User Management
- Discovery
- Services

Configuring: Institution 1

You are now configuring : Institution 1

Acquisitions

Terms of Use	Fulfillment Units	General Electronic Services
Policies	Fulfillment Unit Rules	General Electronic Services Rules
Display Logic Rules		

Administration

Terms of Use	Fulfillment Units	General Electronic Services
Policies	Fulfillment Unit Rules	General Electronic Services Rules
Display Logic Rules		

Fulfillment

Terms of Use	Fulfillment Units	General Electronic Services
Policies	Fulfillment Unit Rules	General Electronic Services Rules
Display Logic Rules		

Resource Sharing

Terms of Use	Fulfillment Units	General Electronic Services
--------------	-------------------	-----------------------------

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- ### Consortia Configuration Management
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 - Administration
 - Fulfillment
 - Resource Sharing
 - User Management
 - Discovery
 - Services
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- Configuration Management
 - You are now configuring: Institution 1
 - Acquisitions
 - Terms of Use Management
 - Policies
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 - Policies
 - Display Logic
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 - Terms of Use Management
 - Policies
 - Display Logic
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Terms of Use Management

Cancel Save

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[+ Add a Term of Use](#)

Terms Of Use Type : All ▾

	Name	Type	TOU Owner	Description	
1	1 Days Faculty Limited	Loan	Institution	1 Days Faculty Limited	...
2	1 Days Faculty Limited	Request	Institution	1 Days Faculty Limited	...
3	1 Hours Students Limited	Loan	Institution	1 Hours Students Limited	...
4	1 Hours Students Limited	Request	Institution	1 Hours Students Limited	...
5	1 Hours Visitors Limited	Loan	Institution	1 Hours Visitors Limited	...
6	1 Hours Visitors Limited	Request	Institution	1 Hours Visitors Limited	...
7	1 Month Students General	Loan	Institution	1 Month Students General	...
8	1 Month Students General	Request	Institution	1 Month Students General	...
9	1 Month Visitors Closed Stack	Loan	Institution	1 Month Visitors Closed Stack	...
10	1 Month Visitors Closed Stack	Request	Institution	1 Month Visitors Closed Stack	...
11	2 Hours Staff Limited	Loan	Institution	2 Hours Staff Limited	...
12	2 Hours Staff Limited	Request	Institution	2 Hours Staff Limited	...
13	2 Hours Visitors Short Loan/Reserve	Loan	Institution	2 Hours Visitors Short Loan/Reserve	...
14	2 Hours Visitors Short Loan/Reserve	Request	Institution	2 Hours Visitors Short Loan/Reserve	...
15	2 Week Visitors General	Loan	Institution	2 Week Visitors General	...

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- Acquisitions
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- Display Logic
- Administrative
- Terms of Use
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- Display Logic
- Fulfillment
- Terms of Use
- Policies
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- Resource Sharing
- Terms of Use

Terms of Use Management

Cancel Save

1 - 20 of 48 | Name | Search

+ Distribute Selected | + Add a Term of Use | Settings

Terms Of Use Type : All

<input type="checkbox"/>	Name	Type	TOU Owner	Description	Distributed for	
<input checked="" type="checkbox"/>	1 1	Loan	Institution	1		...
<input checked="" type="checkbox"/>	2 1	Request	Institution	1		...
<input type="checkbox"/>	3 1 Days Faculty Limited	Loan	Institution	1 Days Faculty Limited		...
<input type="checkbox"/>	4 1 Days Faculty Limited	Request	Institution	1 Days Faculty Limited		...
<input type="checkbox"/>	5 1 Hours Students Limited	Loan	Institution	1 Hours Students Limited		...
<input type="checkbox"/>	6 1 Hours Students Limited	Request	Institution	1 Hours Students Limited		...
<input type="checkbox"/>	7 1 Hours Visitors Limited	Loan	Institution	1 Hours Visitors Limited		...
<input type="checkbox"/>	8 1 Hours Visitors Limited	Request	Institution	1 Hours Visitors Limited		...
<input type="checkbox"/>	9 1 Month Students General	Loan	Institution	1 Month Students General		...
<input type="checkbox"/>	1... 1 Month Students General	Request	Institution	1 Month Students General		...
<input type="checkbox"/>	1... 1 Month Visitors Closed Stack	Loan	Institution	1 Month Visitors Closed Stack		...
<input type="checkbox"/>	1... 1 Month Visitors Closed Stack	Request	Institution	1 Month Visitors Closed Stack		...
<input type="checkbox"/>	1... 2 Hours Staff Limited	Loan	Institution	2 Hours Staff Limited		...
<input type="checkbox"/>	1... 2 Hours Staff Limited	Request	Institution	2 Hours Staff Limited		...
<input type="checkbox"/>	1... 2 Hours Visitors Short Loan/Reserve	Loan	Institution	2 Hours Visitors Short Loan/Reserve		...

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Consortia Configuration Management

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Terms of Use Management

Cancel Save

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Distribute Selected ▾ Add a Term of Use

Terms Of Use Type : All ▾

Distribute Selected

Institution 1 ✕

Institution 2 ✕

	Description	Distributed for	
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>	... Faculty Limited		...
<input type="checkbox"/>	... Faculty Limited		...
<input type="checkbox"/>	... Students Limited		...
<input type="checkbox"/>	... Students Limited		...
<input type="checkbox"/>	... Visitors Limited		...
<input type="checkbox"/>	... Visitors Limited		...
<input type="checkbox"/>	8 1 Hours Visitors Limited	Request Institution	1 Hours Visitors Limited
<input type="checkbox"/>	9 1 Month Students General	Loan Institution	1 Month Students General
<input type="checkbox"/>	1... 1 Month Students General	Request Institution	1 Month Students General
<input type="checkbox"/>	1... 1 Month Visitors Closed Stack	Loan Institution	1 Month Visitors Closed Stack
<input type="checkbox"/>	1... 1 Month Visitors Closed Stack	Request Institution	1 Month Visitors Closed Stack
<input type="checkbox"/>	1... 2 Hours Staff Limited	Loan Institution	2 Hours Staff Limited
<input type="checkbox"/>	1... 2 Hours Staff Limited	Request Institution	2 Hours Staff Limited
<input type="checkbox"/>	1... 2 Hours Visitors Short Loan/Reserve	Loan Institution	2 Hours Visitors Short Loan/Reserve

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Terms of Use Management

Cancel Save

1 - 20 of 48 Name

Distribute Selected Add a Term of Use

Terms Of Use Type: All

<input type="checkbox"/>	Name	Type	TOU Owner	Description	Distributed for	
<input type="checkbox"/>	1 1	Loan	Institution	1	Institution 1, Institution 2	...
<input type="checkbox"/>	2 1	Request	Institution	1	Institution 1, Institution 2	...
<input type="checkbox"/>	3 1 Days Faculty Limited	Loan	Institution	1 Days Faculty Limited		...
<input type="checkbox"/>	4 1 Days Faculty Limited	Request	Institution	1 Days Faculty Limited		...
<input type="checkbox"/>	5 1 Hours Students Limited	Loan	Institution	1 Hours Students Limited		...
<input type="checkbox"/>	6 1 Hours Students Limited	Request	Institution	1 Hours Students Limited		...
<input type="checkbox"/>	7 1 Hours Visitors Limited	Loan	Institution	1 Hours Visitors Limited		...
<input type="checkbox"/>	8 1 Hours Visitors Limited	Request	Institution	1 Hours Visitors Limited		...
<input type="checkbox"/>	9 1 Month Students General	Loan	Institution	1 Month Students General		...
<input type="checkbox"/>	1... 1 Month Students General	Request	Institution	1 Month Students General		...
<input type="checkbox"/>	1... 1 Month Visitors Closed Stack	Loan	Institution	1 Month Visitors Closed Stack		...
<input type="checkbox"/>	1... 1 Month Visitors Closed Stack	Request	Institution	1 Month Visitors Closed Stack		...
<input type="checkbox"/>	1... 2 Hours Staff Limited	Loan	Institution	2 Hours Staff Limited		...
<input type="checkbox"/>	1... 2 Hours Staff Limited	Request	Institution	2 Hours Staff Limited		...
<input type="checkbox"/>	1... 2 Hours Visitors Short Loan/Reserve	Loan	Institution	2 Hours Visitors Short Loan/Reserve		...

Alma QA

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Cancel Save

1 - 20 of 48 Name [input] [search]

+ Add a Term of Use [share] [settings]

Terms Of Use Type : All

Name	Type	TOU Owner	Description
1 1	Loan	Network	1
2 1	Request	Network	1
3 1 Days Faculty Limited	Loan	Institution	1 Days Faculty Limited
4 1 Days Faculty Limited	Request	Institution	1 Days Faculty Limited
5 1 Hours Students Limited	Loan	Institution	1 Hours Students Limited
6 1 Hours Students Limited	Request	Institution	1 Hours Students Limited
7 1 Hours Visitors Limited	Loan	Institution	1 Hours Visitors Limited
8 1 Hours Visitors Limited	Request	Institution	1 Hours Visitors Limited
9 1 Month Students General	Loan	Institution	1 Month Students General
1... 1 Month Students General	Request	Institution	1 Month Students General
1... 1 Month Visitors Closed Stack	Loan	Institution	1 Month Visitors Closed Stack
1... 1 Month Visitors Closed Stack	Request	Institution	1 Month Visitors Closed Stack
1... 2 Hours Staff Limited	Loan	Institution	2 Hours Staff Limited
1... 2 Hours Staff Limited	Request	Institution	2 Hours Staff Limited
1... 2 Hours Visitors Short Loan/Reserve	Loan	Institution	2 Hours Visitors Short Loan/Reserve

Consortia

◀ Analytics and Insights | Digital Resource Management ▶



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Consortia

Overview

Alma supports consortia by providing a platform for working together and sharing resources, while allowing members to independently and separately manage their own library needs.

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 - 1.4.3. User Groups in a Fulfillment Network

Roadmap

2024 H1	2024 H2
<ul style="list-style-type: none">• Central Configuration By Central Office• Control Imports to Network Zone• Display Logic Rules for Shared Electronic Resources Managed in the Network Zone• Order of Shared Electronic Resources Managed in the Network Zone	<ul style="list-style-type: none">• Blocks Across a Network• Real-Time Update of Linked Accounts• User Groups in a Fulfillment Network



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Thank You!

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