

Webinar Agenda



- · Webinar Objectives
- · Managing Menus in 360RM
- The 6 Customizable Menus and Where They Live in 360RM
- · Quick Live Demo
- . 20-30 minutes

Webinar Objectives



- Provide ongoing education using targeted learning concepts that are delivered in digestible "bites"
- Refresh/reinforce key product functionality without getting too granular
- Raise awareness regarding product functionality, recent upgrades and/or enhancements
- Prompt libraries to take action, drive implementation & adoption and continuously improve

Managing Menus in 360RM





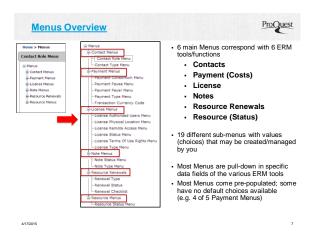
- · Menu customization is part of 360RM functionality
- Menus are kept and managed using a centralized tool, available from the Client Center as part of your 360 Resource Manager subscription
- Customize Menus using local terms a "controlled vocabulary" that match your library's needs & workflows
- $\boldsymbol{\cdot}$ "Values-based decision" of your ERM implementation team
- Consider the output (Management Report) when creating custom Menus

Menu Permissions





 Menus are governed by a specific 360 Resource Manager Permission, associated with your library Accounts





4/17/2015

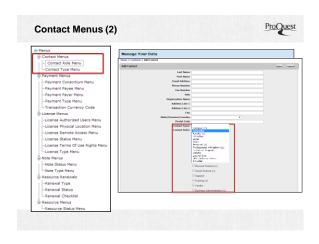
Clicking on Red "X" will delete a custom Menu item.

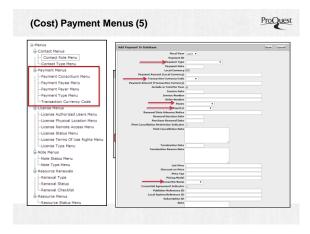
Set Menu Order

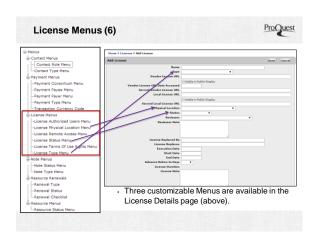
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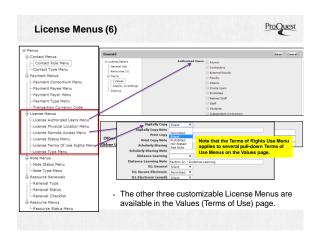
 Menu values appear in the same order in the Contacts tool, Contact Role checkbox menu.

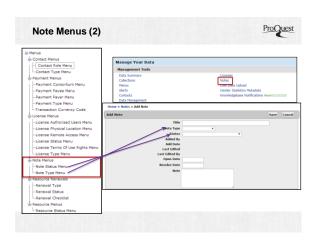
3

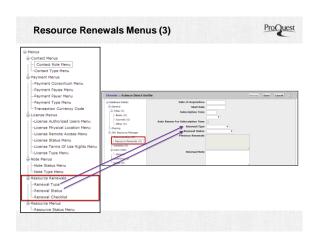


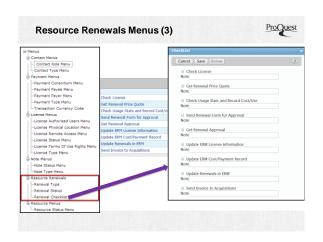


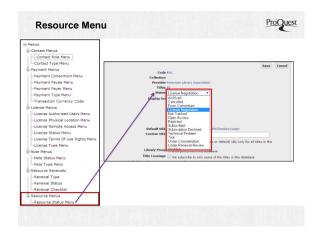












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Archived	Colleague [c]	Acquisition	ERT Review List	Institution (c)	Awaiting vendor generic license
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Do Not Use: Use (c)	Internal Sales	Open			Electronic version created
Deactivate EJ - Final Check Legal [c]	Legal (c)	General			Redacted version created

Support Documentation Articles	
360 Resource Manager User Guide	
- Menu Tool	
THANK YOU!	
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