



E-Read Texas Boundless Training Session 3: Advanced Admin

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Texas State Library and Archives Commission

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Session Overview

- Advanced Admin Training
 - Creating featured lists
 - Library admin options
 - Creating programs
 - Site scoping
- Questions



Boundless Admin Site Review

Getting Started – Onboarding Email



SAMPLE

Greetings [REDACTED]

Great news! We have completed your Boundless site setup. You now have access to the E-Read Texas shared digital collection.

Our Customer Success Management team members will be working with you as you prepare for your library's Boundless launch. They will be able to help answer any questions you may have concerning the Boundless features and functions.

Jesse Wilson will be your Customer Success Manager and will be your main contact throughout your Boundless experience once you are fully trained.

While Jesse is preparing the next steps for you, please find the below information to get familiar with Boundless.

The library's **Boundless Digital Media Library** can be accessed via this URL:

[https://\[REDACTED\].boundless.baker-taylor.com](https://[REDACTED].boundless.baker-taylor.com)

The library's **Boundless administration site** can be accessed via this URL:

[https://\[REDACTED\].boundless.baker-taylor.com/admin](https://[REDACTED].boundless.baker-taylor.com/admin)

Areas of Interest

- TS360 Account Number
- Site URL
- Admin URL & Log-in
- Main contacts
- Support

Login to your Admin Site with these credentials:

Username: [REDACTED]

Password: [REDACTED]

Once signed into the admin site, please see the admin user guide under "help" in the upper right-hand corner for any assistance. If you have any questions you may get in touch with us via the contacts below:

Customer Success Manager

Jesse Wilson / jesse.wilson@baker-taylor.com

Account Assistance

For questions about orders and billing, please email us at [\[REDACTED\]boundlesservice@baker-taylor.com](mailto:[REDACTED]boundlesservice@baker-taylor.com)

Digital Support

If ever you need help accessing your Boundless website or econtent products, our Digital Support staff can be reached, toll-free, at 1-800-775-3700, option 2 or by e-mail at [\[REDACTED\]boundlessupport@baker-taylor.com](mailto:[REDACTED]boundlessupport@baker-taylor.com).

Below is a very helpful link to add to your website for help/training for staff and patrons:

Resources

Help and Training: <https://baker-taylor.my.site.com/boundless/s/>

We hope that your Boundless experience is rewarding!

Onboarding Services
Baker & Taylor
onboardingservices@baker-taylor.com

Admin Log-in Screen

Tips & Tricks

- Main site URL plus/admin will get you to the site.
- Onboarding email has credentials
- Make sure no spaces are before or after information



Login

A screenshot of the admin login interface. It features a central white login box with a dark green header bar at the top. The box is titled 'Log In' and contains two input fields: one for the username 'wilsonj' and one for the password, which is masked with dots. Each field has a red 'show/hide' icon to its right. Below the fields is a dark green 'LOGIN' button. The background is a light gray gradient.

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[Privacy Policy](#) Website Powered by Boundless

Customization Options

The screenshot displays the Jasper Public Library dashboard. At the top left is the "E-Read TEXAS" logo. The top right navigation bar includes links for Account, Contact Details, Support Form, Marketing Tools, Help, and Log Off. Below this is a secondary navigation bar with icons for Home, Settings, Reviews, Reports, Programs, and Library Admin. The "Programs" and "Library Admin" icons are circled in red. The main content area is titled "Jasper Public Library" and features a "Home" link. A grid of nine customization options is shown, each with a title, description, and icon. The "List Management", "Programs", "Library Announcements", and "Library Administration" options are circled in red.

E-Read TEXAS

Account Contact Details Support Form Marketing Tools Help Log Off

Home Settings Reviews Reports Programs Library Admin

Jasper Public Library

Home

- Settings**
Manage your library's loan and review settings for your patrons.
- Interactive Dashboard Reports**
View, filter and drilldown into Inventory, Circulation and User Data
- Reports**
Access reporting to view inventory and usage statistics for your library.
- Reviews**
Approve and manage the reviews for your Library.
- List Management**
Manage your library custom title selection lists.
- Programs**
Create and manage library reading programs (i.e., Book of the Month Club, Summer Reading, etc.).
- Library Announcements**
Upload videos and images, and add text to your news story.
- Library Administration**
Manage the content on the Library page. You can show/hide modules, and edit some of them too.

List Management - What are Lists?

The screenshot displays a digital library interface. At the top, there is a navigation bar with a menu icon, the 'e-Read TEXAS' logo, a search bar containing 'Search for content', an 'Advanced Search' link, and a 'Sign in' button. Below the navigation bar, two main sections are visible: 'Fiction' and 'Non-Fiction'. Each section features a horizontal row of book covers with their respective page counts and formats (eBook or physical book). A 'See All >' link is positioned to the right of each row. A right-pointing arrow is located to the right of the book covers in both sections.

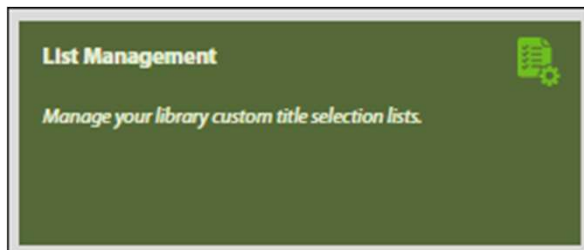
Fiction See All >

- Once Flynn: Capture or Kill (464 Pages)
- The Fallen Fruit (448 Pages)
- Waiting for Christmas (288 Pages)
- Bright I Burn (272 Pages)
- Woman (eBook)
- Guide Me Home (eBook)
- Haunt Sweet Home (192 Pages)
- P. D. Robb: Passions in Death (368 Pages)
- Coco Mellors: Blue Sisters (352 Pages)
- Haunting of the Moscow House (384 Pages)

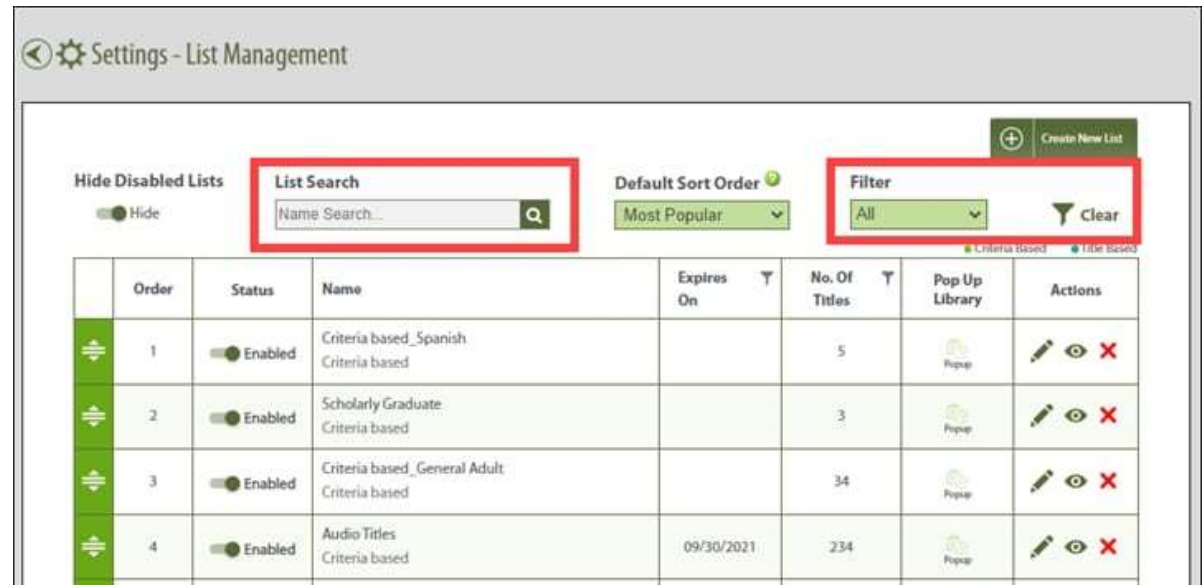
Non-Fiction See All >

- Living in the American South (512 Pages)
- The Comfort of Crows (256 Pages)
- David M. Rubenstein: The Highest Calling (496 Pages)
- Jiji Gali (272 Pages)
- Supremacy (288 Pages)
- The Rising (368 Pages)
- The Generations Long: Finding for Justice in Native Land (352 Pages)
- Rebecca Nagle: First in the Family (272 Pages)
- Yuval Noah Harari: Nexus (528 Pages)
- Walt Hickey: You Are What You Watch (eBook)

List Management



- Create Lists to display on your site.
- **Criteria-based lists** are created using broad criteria, such as entire subjects and audience levels. These lists display on the left side of the screen in green.
- **Title-based lists** are created using very limited criteria at the individual title level. These lists display on the left side of the screen in blue.



Settings - List Management

Hide Disabled Lists Hide

List Search: Name Search...

Default Sort Order: Most Popular

Filter: All

Order	Status	Name	Expires On	No. Of Titles	Pop Up Library	Actions
1	Enabled	Criteria based_Spanish Criteria based		5	PopUp	
2	Enabled	Scholarly Graduate Criteria based		3	PopUp	
3	Enabled	Criteria based_General Adult Criteria based		34	PopUp	
4	Enabled	Audio Titles Criteria based	09/30/2021	234	PopUp	

Criteria-Based List Creation

- (1) – Select **Criteria Based**.
- (2) – Select **Profile Type(s)**.
- (3) – Enter a **List Name** and **List Description** in the associated fields.
- (4) – If you want to publish this list immediately, select **Enabled** for the **Status**.
- (5) – Choose how you would like to sort your list in the **List Sort** field: **Just Added**, **Publication Date**, **Most Popular**, **Recently Returned**, **Title**, or **Author**.
- (6) – If you would like your list to be time-sensitive, select a **Start Date** and/or an **End Date** from the associated date pickers. The list will only display during the dates you select once you have enabled it.
- (7) – Select the type of titles you wish to include on your list: **eBooks** and/or **Audiobooks**. Select **Only show titles currently available for checkout** to ensure that only titles that do not have any holds on them display within your list.
- Once you are finished completing fields on the **List Details** tab, click **Next**.

The screenshot shows the 'List Management - Create List' interface. The 'List Type' is set to 'Criteria Based' (1). The 'Profile Type' is set to 'General', 'Teen', and 'Kid' (2). The 'List Name' is 'Fiction' and the 'List Description' is 'This list includes a list of popular fiction titles.' (3). The 'Status' is 'Enabled' (4). The 'List Sort' is 'Most Popular' (5). The 'Start Date' and 'End Date' are empty (6). The 'Filters' are 'eBook' and 'eAudio' (7). The 'Next' button is highlighted with a red arrow.

Criteria-Based List Creation

- (1) – Search for a specific subject or ISBN in the **Search** field to include in your list, or select from the list of subjects provided. To select a subcategory within a subject, click on the arrow next to the subject name to expand it.
- (2) – Use the arrows to move subjects in and out of the selected subject box on the right side of the screen. Any subjects you leave on the right side of the screen will be included in the associated list.



- Use this arrow to move all subjects into the selected subjects box on the right side of the screen. This can be useful when you want to include most subjects, as it allows you to simply remove the ones you do not want to use, instead of adding each subject manually.



- Use this arrow to move a single subject into the selected subjects box on the right side of the screen. You can add main subject headings or subcategories found within the main subject headings.



- Use this arrow to move a single subject out of the selected subjects box on the right side of the screen. When you remove a subject from this area, it will not be included in the associated list.



- Use this arrow to move all subjects out of the selected subjects box on the right side of the screen.

- (3) – Select the audience levels you wish to include in your list within the **Audiences** area. The audience options that display will be based on your *profile type* selection. Only titles that match those audience levels will be included in this list.
- (4) – Select the **Languages** you wish to include in your list within the associated section. Only titles that have the selected languages will be included in this list.
- When you are done making selections on this tab, click **Next**.

The screenshot displays the 'Criteria Selection' tab of a software interface. At the top, there are three tabs: 'List Details', 'Criteria Selection' (active), and 'Preview'. On the right side of the top bar, there are 'Next' and 'Cancel' buttons. The main content area is divided into three sections:

- Subjects:** A search bar labeled 'Search Subject or ISBN' with a red '1' next to it. Below it is a list of subject categories with expandable arrows and counts, such as 'ANTIQUE & COLLECTIBLES (45)', 'ARCHITECTURE (25)', 'ART (56)', 'BIBLES (24)', 'BIOGRAPHY & AUTOBIOGRAPHY (38)', 'BODY, MIND & SPIRIT (38)', 'BUSINESS & ECONOMICS (111)', 'COMICS & GRAPHIC NOVELS (13)', 'COMPUTERS (80)', 'CRAFTS & HOBBIES (61)', 'DESIGN (14)', 'DRAMA (17)', and 'EDUCATION (55)'. To the right of this list is a 'Selected subjects for your criteria' box with a red '2' next to it. This box contains a list of selected subjects: 'COOKING (123)', 'MEDICAL (2)', 'REFERENCE (1)', and 'TRAVEL (1)' with a sub-entry 'Food, Lodging & Transportation / Restaurants'. Between the two lists are four directional arrow buttons.
- Audiences:** A section with a red '3' next to it, containing a list of audience categories with checkboxes. The 'Children' category is selected, and its sub-options are: 'Babies, Age 0-2', 'Kindergarten, Age 5-6', 'Grade 2-3, Age 7-8', 'Grade 4-6, Age 9-11', 'Toddlers, Age 2-4', and 'Grade 1-2, Age 6-7'. Other categories include 'Teens', 'General Adult', 'Professional', 'Scholarly/Associate', 'Scholarly/Graduate', and 'Scholarly/Undergraduate'.
- Languages:** A section with a red '4' next to it, containing a list of languages with checkboxes. The 'ENGLISH' option is selected. Other languages listed include 'AFRIKAANS', 'ARABIC', 'BULGARIAN', 'CATALAN', 'CHINESE', 'CZECH', 'DUTCH', 'FRENCH', 'GERMANIC (OTHER)', and 'GERMAN'.

BISAC Breakdown

Historietas Juveniles Biografias/ Jr. Graphic Biographies Set		\$157.50 <small>Net: \$157.50</small>	
Not Available			
ISBN: 9781435885721			
Spanish			
Product Lookup: ISBN			
Publish Status:			
Publisher:	Powerkids Pr	Publish Date:	01/15/2009
Edition/Volume:		Street Date:	01/15/2009
Audience:	Children's - Grade 4-6, Age 9-11	Dewey:	900
LCCN:		L.C. Class:	D
Series Name:	Historietas Juveniles Biografias/ Jr. Graphic Biographies	OCLC Number:	ocn962549128
1st BISAC Subject: JUVENILE NONFICTION / Comics & Graphic Novels / History			
Available to Backorder			



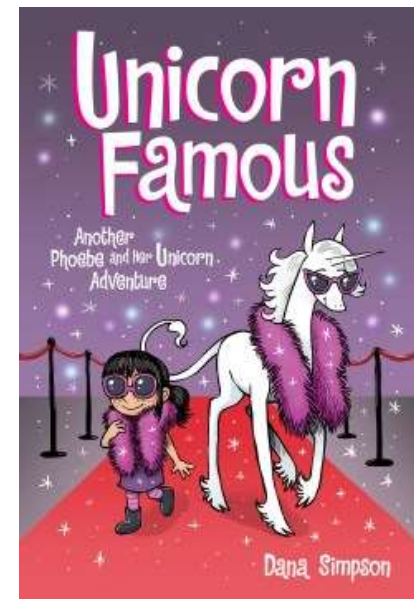
BISAC is an industry-approved list of subject descriptors. The descriptor itself consists of two, three, or four levels.



- Comics & Graphic Novels
- Romance
- Historical Fiction
- Humorous



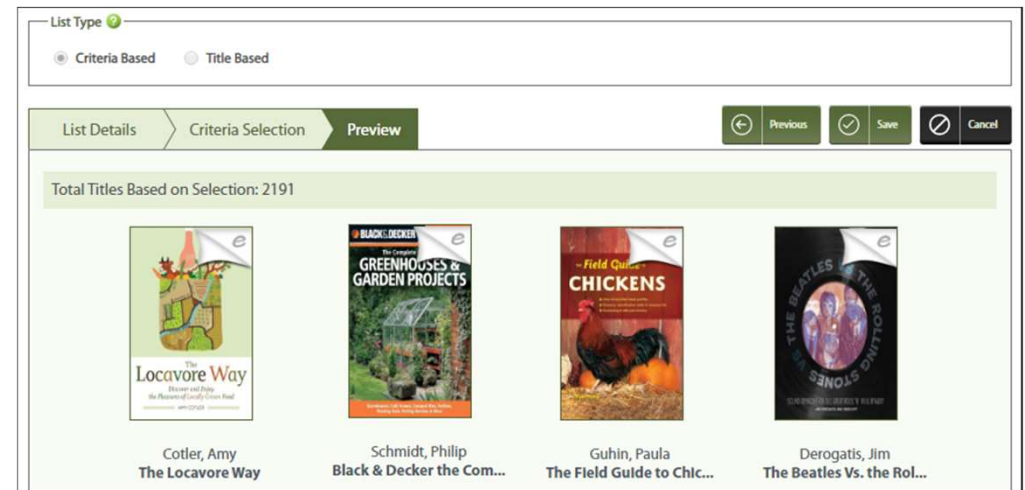
- Young Adult Fiction
- Comics & Graphic Novels
- Fantasy
- Family
- Alternative Family
- Wizards & Witches



- Juvenile Fiction
- Comics & Graphic Novels
- General
- Fairy Tales, Folklore, Legends & Mythology
- Humorous

Criteria-Based List Creation

- The **Preview** tab displays all titles that match your selected criteria. If you have limited yourself too much and either have no titles that match your criteria, or too few, click **Previous** to go back to the Criteria Selection tab to select more titles. Click **Save** to complete your list.
- If you selected **Enabled** on the List Details tab, you'll get a message stating that your newly created list will display on your Boundless site in 15 minutes. If you did not enable your list, you can come back later to complete it.



Title-Based List Creation

- (1) – Select **Title-Based**.
- (2) – Select **Profile Type(s)**.
- (3) – Enter a **List Name** and **List Description** in the associated fields.
- (4) – If you want to publish this list immediately, select **Enabled** for the **Status**. (5) – Choose how you would like to sort your list in the **List Sort** field: **Just Added, Publication Date, Most Popular, Recently Returned, Title, or Author**.
- (6) – If you would like your list to be time-sensitive, select a **Start Date** and/or an **End Date** from the associated date pickers. The list will only display during the dates you select once you have enabled it.
- (7) – Select the type of titles you wish to include on your list: **eBooks** and/or **Audiobooks**. Select **Only show titles currently available for checkout** to ensure that only titles that do not have any holds on them display within your list.
- Once you are finished completing fields on the **List Details** tab, click **Next**.

The screenshot shows the 'List Management - Create List' interface. At the top, there are two tabs: 'List Details' and 'Title Selection'. The 'List Details' tab is active. The interface is divided into several sections:

- List Type:** Radio buttons for 'Criteria Based' and 'Title Based' (1).
- Profile Type:** Checkboxes for 'General', 'Teen', and 'Kid' (2).
- List Name:** A text input field containing 'Staff Picks'.
- List Description:** A text area containing 'This is a list curated based on library staff picks.' (3).
- Status:** A toggle switch set to 'Enabled' (4).
- List Sort:** A dropdown menu set to 'Most Popular' (5).
- Start Date and End Date:** Two date pickers (6).
- Filters:** Checkboxes for 'ebook' and 'eAudio' (7).
- Only show titles currently available for check out:** An unchecked checkbox.

At the bottom right, there are three buttons: 'Next' (with a right arrow), 'Cancel', and 'Cancel' (with a left arrow). A red arrow points to the 'Next' button.

Title-Based List Creation

- (1) – Search for your title in the **Search** field. You can search by **Keyword**, **Title**, or **Author**.
- (2) – To narrow down your search results, select a filter from under the search term you just entered.
- (3) – Any titles that match your search criteria display on the right side of the screen. Hover over a title to reveal several selection options. To learn more about a title, click on the **View Title Details** icon. To add the title to your list, click on the **Add Title** icon.
- (4) – If you want to add all titles on the current page to your list, click **Add Page**. To add all titles found in your search, click **Add All**.
- (5) - To upload up to 500 ISBNs, click **Add ISBN**. Enter or paste your ISBNs on the left side of the pop-up, and then click **Add to List**. Your ISBNs will be uploaded automatically to your list.

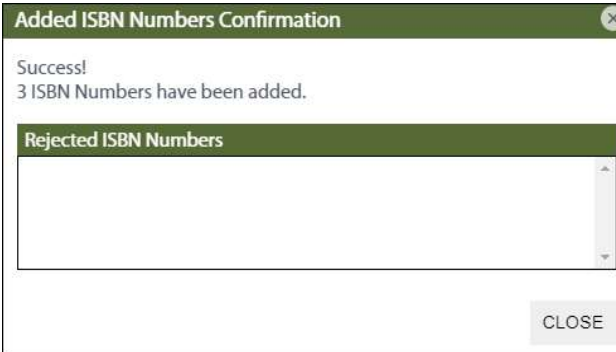
The screenshot displays the 'Title-Based List Creation' interface. At the top, the 'List Type' is set to 'Title Based'. Below this, there are tabs for 'List Details', 'Title Selection', and 'Preview'. A search bar contains the word 'mystery', and a dropdown menu is open showing various filters. The main area shows a grid of book covers with the text '132 titles found'. A sidebar on the left lists filters: Publication Date, Date Added, Availability, Subject, Format, and Format Type. The book covers include 'Mixed Blood' by Roger Smith, 'Honey Blonde Blues!' by Larry Kent, 'The Ring on the Hand of...' by Otto Penzler, 'A Grave', and 'Killed on the Altar of...'. A 'Lightning Source' pop-up is visible on the right, showing 'A Sinner's Prayer' by Wright, M. P. with a publication date of 07/15/2019. Red circles with numbers 1 through 5 highlight key UI elements: 1. Search field, 2. Filter dropdown, 3. View Title Details icon, 4. Add Page button, and 5. Add ISBN button.

Title-Based List Creation

- To upload up to 500 ISBNs, click **Add ISBN**. Enter or paste your ISBNs on the left side of the pop-up, and then click **Add to List**. Your ISBNs will be uploaded automatically to your list.
- You'll receive a success message. If any of the ISBNs are rejected, a list of the rejected ISBNs will display under the **Rejected ISBN** column.

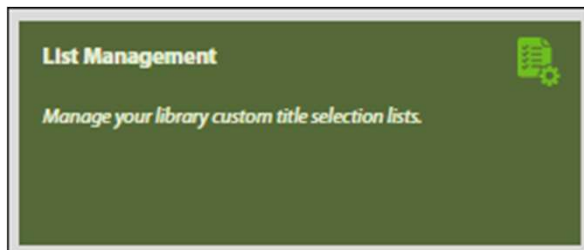


The screenshot shows a pop-up window titled "Add ISBN Numbers" with a close button (X) in the top right corner. The main text reads "Type or Paste your ISBN Numbers (500 number max)". On the left, there is a text input field with a green header "ISBN Numbers" containing the text "9781094244389", "9780463153710", and "9781543975413". Below the input field, it says "3 of 500". On the right, there is a text area with a green header "Format Examples:" containing "9781603423851" and "9781603423853". At the bottom right, there are two buttons: "CANCEL" and "ADD TO LIST".

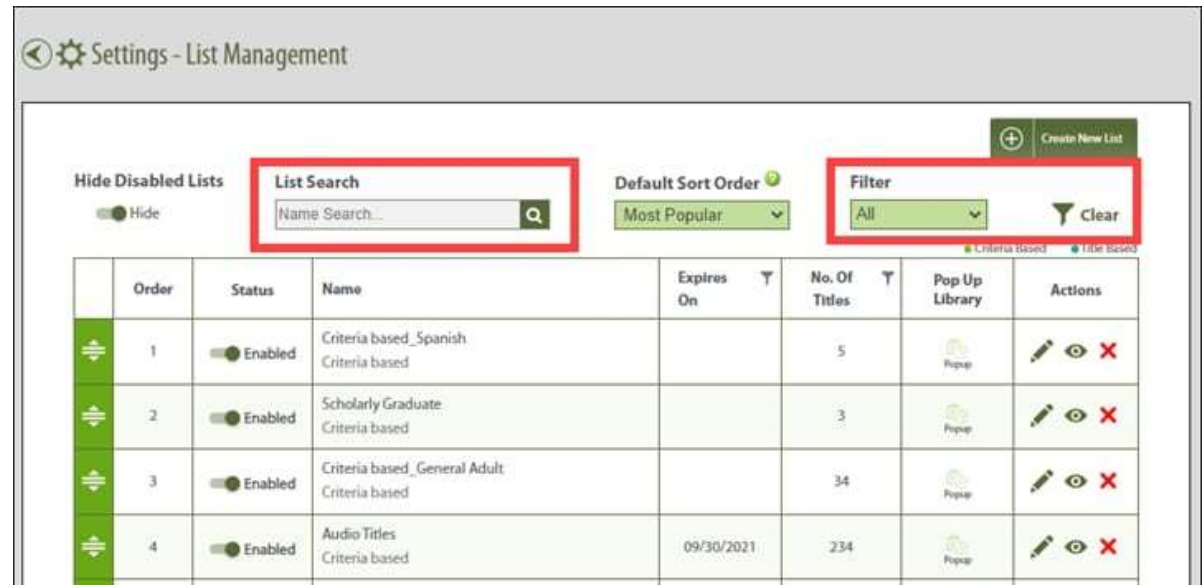


The screenshot shows a pop-up window titled "Added ISBN Numbers Confirmation" with a close button (X) in the top right corner. The main text reads "Success! 3 ISBN Numbers have been added." Below this, there is a text area with a green header "Rejected ISBN Numbers" and a scrollable list area that is currently empty. At the bottom right, there is a "CLOSE" button.

List Management



- Create Lists to display on your site.
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- **Title-based lists** are created using very limited criteria at the individual title level. These lists display on the left side of the screen in blue.



Settings - List Management

Hide Disabled Lists Hide

List Search
Name Search...

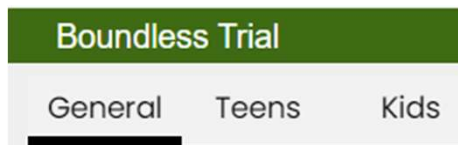
Default Sort Order

Filter
All

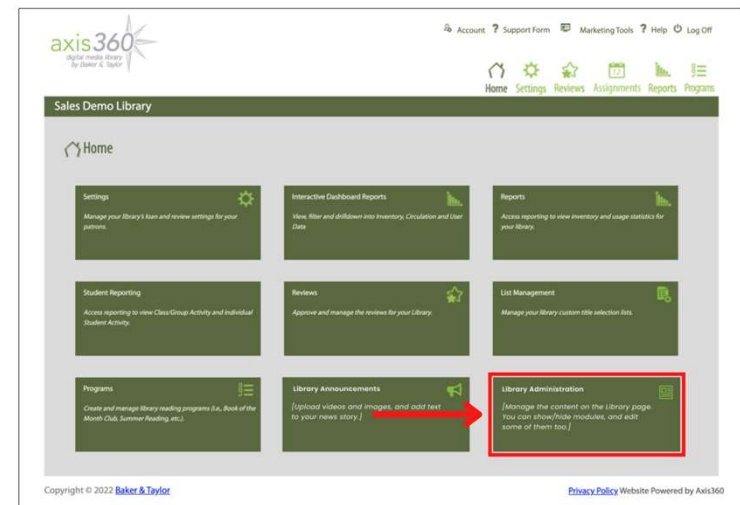
	Order	Status	Name	Expires On	No. Of Titles	Pop Up Library	Actions
<input type="checkbox"/>	1	<input checked="" type="checkbox"/> Enabled	Criteria based_Spanish Criteria based		5	<input type="checkbox"/> PopUp	<input type="button" value="Edit"/> <input type="button" value="Eye"/> <input type="button" value="X"/>
<input type="checkbox"/>	2	<input checked="" type="checkbox"/> Enabled	Scholarly Graduate Criteria based		3	<input type="checkbox"/> PopUp	<input type="button" value="Edit"/> <input type="button" value="Eye"/> <input type="button" value="X"/>
<input type="checkbox"/>	3	<input checked="" type="checkbox"/> Enabled	Criteria based_General Adult Criteria based		34	<input type="checkbox"/> PopUp	<input type="button" value="Edit"/> <input type="button" value="Eye"/> <input type="button" value="X"/>
<input type="checkbox"/>	4	<input checked="" type="checkbox"/> Enabled	Audio Titles Criteria based	09/30/2021	234	<input type="checkbox"/> PopUp	<input type="button" value="Edit"/> <input type="button" value="Eye"/> <input type="button" value="X"/>

Criteria based Title based

Library Administration



- Select the **Library Administration** Tile or Icon to customize your Boundless page.
- Can customize to profile type for most features.
- Features to Customize
 - Featured Program - Highlight special program.
 - Announcements - Use this area to advertise events at your library. *This will display across all profiles.*
 - Book of the Month - Highlight a featured title
 - Featured Lists - Highlight a special event list.
 - Customized Lists - Arrange your library customized lists.

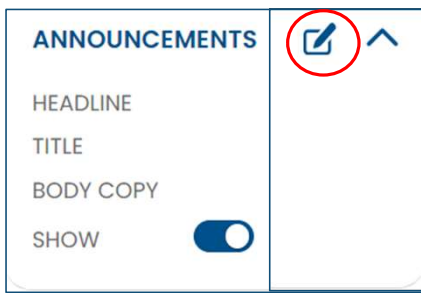


Library Admin Page

The screenshot displays the 'Library Admin' interface for 'E-Read TEXAS'. At the top left is the logo. The top right navigation bar includes links for Account, Contact Details, Support Form, Marketing Tools, Help, and Log Off. Below this is a secondary navigation bar with icons for Home, Settings, Reviews, Reports, Programs, and Library Admin. A tabbed interface shows 'General' selected, with 'Teens' and 'Kids' also visible. A 'Help Me Customize My Page' link and an 'Expand All' dropdown are on the right. The main content area contains a list of five customizable sections, each with a title, a progress indicator, and edit/delete icons:

- FEATURED READING PROGRAM
- ANNOUNCEMENTS
- BOOK OF THE MONTH
- RESOURCE HUB
- FEATURED LIST

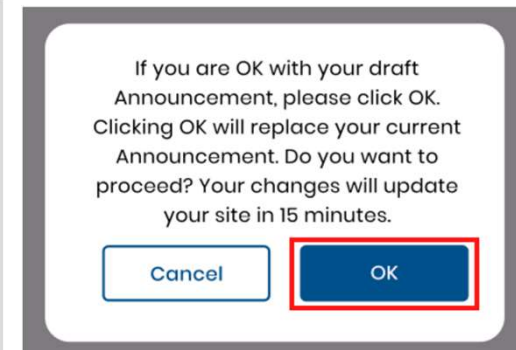
Library Administration - Announcements



Click the pencil icon to edit your Announcement.

A screenshot of the "CREATE ANNOUNCEMENT" form. It includes fields for "Headline" (ANNOUNCEMENTS 13 / 30), "Title" (Beach Day! 10 / 30), "URL", and "Body Copy" (Come Join the Library for a Beach themed story time. 53 / 130). There is an "Image" section with a selected image of a sunset. At the bottom, it lists supported file types (JPG, PNG) and a max file size of 1 MB. There are "Remove", "Preview", and "Publish" buttons.

Create your Announcement and Preview it. Click Publish when you are done.



The Announcement will show on your Library's Magic Wall. You can move the announcement to anywhere you want on the page.*

Library Administration - Book of the Month

BOOK OF THE MONTH

ISBN 9781728246017
HEADLINE Book of the Month!
DESCRIPTION Mysterious disappearances. An urban legend, and a group of determined friends...
SHOW



Book of the Month is a great way to highlight Book Club books, underperforming titles, and titles related to special events.

BOOK OF THE MONTH



ISBN
9781728246017

HEADLINE
Book of the Month!

18/20

DESCRIPTION
Mysterious disappearances. An urban legend, and a group of determined friends...

81/130

SHOW

Save

Library admin on Webpage

HAPPY HOLIDAYS





Holiday Traditions
- From Around the World


BOOK OF THE MONTH!



Shirley Jackson's beloved
gothic tale of a peculiar girl
named Merricat and her...

Library Administration - Featured List


FEATURED LIST  

HEADING HEADING 

NO. OF TITLES 76

DESCRIPTION

SHOW

 Featured Curated List is common for both 'My Library' & 'My Shelf'.

Save

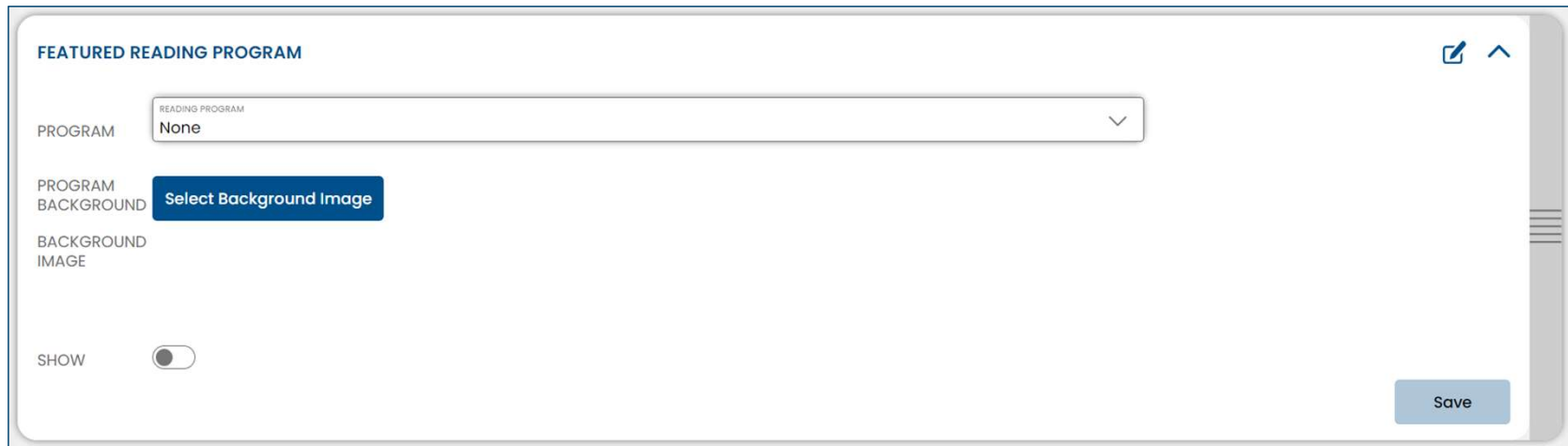
This feature highlights your created lists. Use it to feature special event titles, book club titles, and holiday themed lists.

Library Admin Page

The screenshot displays a vertical list of seven categories in a light gray sidebar. Each category is represented by a rounded rectangular button with a white background and a light gray border. The categories are: FEATURED LIST, NEWSPAPERS & MAGAZINES, FEATURED, FICTION, NON-FICTION, TEENS, and CHILDREN. To the right of each category name are two small icons: a pencil icon for editing and a downward-pointing chevron for expansion. On the far right of the sidebar, there is a vertical stack of three horizontal lines (a hamburger menu icon) and a blue circular help icon containing a white question mark.

Featured Reading Program

Reading Programs can be used to engage and challenge your patrons. You can create reading programs for anything, such as Book Clubs, current topics, Summer Reading, and more. Set the dates for the program, choose the type of program (read books in order, read x of y books, milestone), and select the profiles to display the program to. Once a patron joins a program, they can opt into display their progress by turning on their Insight & Badges setting.

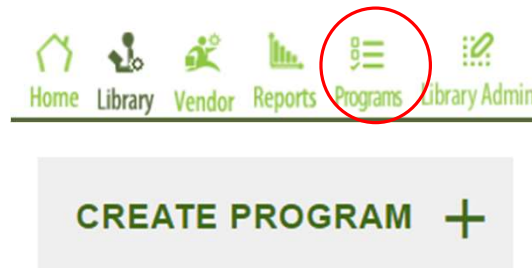


The screenshot shows a configuration interface for a 'FEATURED READING PROGRAM'. The interface includes the following elements:

- PROGRAM**: A dropdown menu labeled 'READING PROGRAM' with the current selection 'None' and a downward arrow.
- PROGRAM BACKGROUND**: A blue button labeled 'Select Background Image'.
- BACKGROUND IMAGE**: A label positioned below the 'PROGRAM BACKGROUND' button.
- SHOW**: A toggle switch currently in the 'off' position.
- Save**: A blue button located in the bottom right corner.
- Icons**: In the top right corner, there are two icons: a pencil (edit) and an upward arrow (back).

Reading Programs

1. Click on the **Create Program** button on the programs home page.
2. The following program options will display on the right side of the screen:
 - **Enter Program Name** - The name you enter here will display to your patrons.
 - **Description (optional)** - If you'd like to add a brief description of the reading program that will display to your patrons, enter it here.
 - **Set Program Type** - Select between the different types of programs
 - **Books in Order** - read program titles in order from start to finish.
 - **X of Y Books** - read _ number of titles out of total (for example, patrons must read any 3 of 5 books). If you select this option, you'll need to specify the Number of Books that must be read in the next field.
 - **Milestone** - read _ number of titles. Goal-based program where library admin sets the # of titles to read, and patrons add their own titles. If you select this option, you'll need to specify the Number of Books that must be read in the next field.
 - **Set Start Date** - This program will become active on the day you set here.
 - **Set End Date** - This program will become inactive on the day you set here.
 - **Set Reminders** - To remind patrons who are enrolled in the program that they have titles to read, select the frequency of the reminders you wish to send: **None**, **Daily**, **Weekly**, or **Monthly**.
 - **Profile Type** - Select the profile types you would like to display the program to.



Create Reading Program

Enter Program Name *

0 / 64 Characters

Description (Optional)

0 / 1300 Characters

PROGRAM DETAILS

Public

Set Program Type *

Set Start Date



Set End Date



Set Reminders

PROFILE TYPES

All

Adult

Teen

Kid

Programs on Website

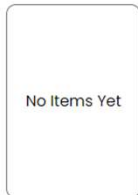
Library > Programs

My Programs Open Programs

Here are the Open Programs that you can join. When you join a Program, it will be moved to your My Programs tab.

Ongoing & Upcoming Programs

training milestone



START	Aug 30, 2023
GOAL	Read 100 books this ...

A-List Authors Book Club



START	Oct 05, 2023
END	Sep 30, 2024
PARTICIPANTS	2

How many bestsellers can you read this summer? Join us and enjoy these new releases from favorite authors.

My Programs Open Programs

My Active Programs

Started

A-List Authors Book Club

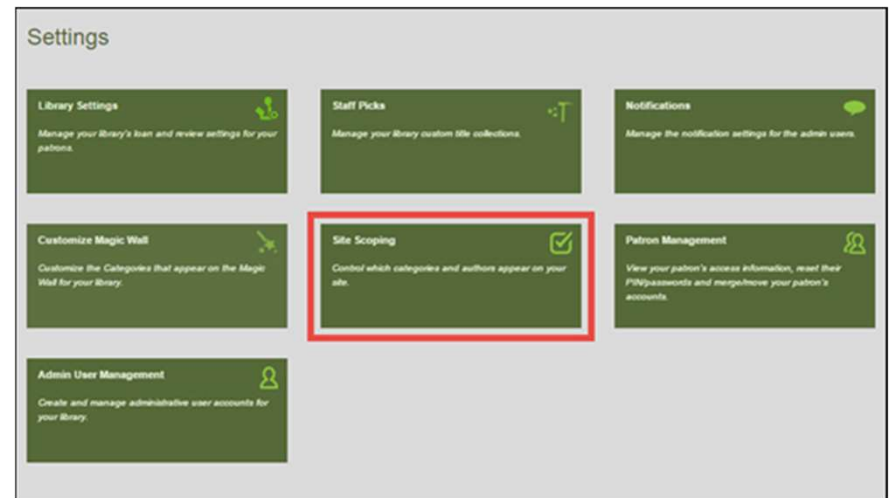


START	Oct 05, 2023
END	Sep 30, 2024
PARTICIPANTS	3

How many bestsellers can you read this summer? Join us and enjoy these new releases from favorite authors.

0%

Scoping





Scoping

- To start the scoping process, click **Edit**. If you've previously excluded any titles from your search results, they will display on this tab.
- **Note: It is not necessary to start with subjects and then move through each setting in order. If you want to exclude only titles, or exclude titles first (for example), you can navigate there directly.**

Scoping - Properties

- To exclude certain audiences, languages, formats, or purchase options from search results, click on the **Properties** tab and then select the elements you want to exclude. For example, if your library focuses solely on children, you may want to exclude any adult or scholarly titles.

Settings - Site Scoping

Library > Subjects > Properties > Authors > Publishers > Titles > Confirm

Check to exclude title based on Audience, Language, Format and/or Purchase Model

Audiences

- Children's
 - Babies, Age 0-2
 - Toddlers, Age 2-4
 - Kindergarten, Age 5-6
 - Grade 1-2, Age 6-7
- Teens
 - Grade 7-9, Age 12-14
 - Grade 10-12, Age 15-18
- General Adult
- Professional
- Scholarly/Associate
- Scholarly/Graduate
- Scholarly/Undergraduate
- Vocational/Technical

Languages

- Select All
- ENGLISH
- ARABIC
- CATALAN
- CZECH
- FRENCH
- GREEK
- HUNGARIAN
- ITALIAN
- KOREAN
- NEPALI
- POLISH
- PUNJABI
- AFRIKAANS
- BULGARIAN
- CHINESE
- DUTCH
- GALICIAN
- GERMAN (OTHER)
- HEBREW
- INDONESIAN
- JAPANESE
- MANDARIN
- OTHER
- PORTUGUESE
- ROMANIAN

Format Types

- Penn Foster
- eAudio
- eBook
- DOL
- VideoBook

Purchase Options

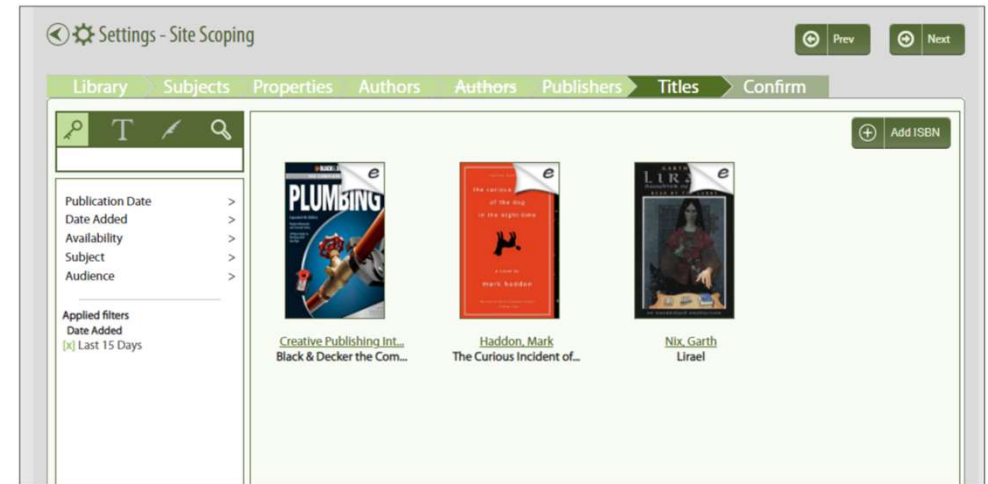
- Single User - 2 Years or 52 Circulation Limit
- Single User - 30 Circulation Limit
- Single User - 35 Circulation Limit
- Single User - ARPA Prorated
- Single User - One Year Limit

Scoping - Subjects

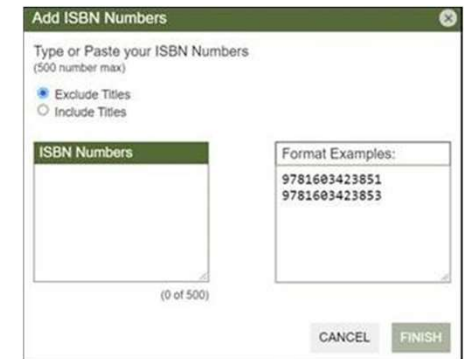
- Click on the **Subjects** tab to begin scoping by Subject. To narrow down the list of subjects to those your patrons can see, select **Only show subjects currently in library**. To search for a subject or ISBN, enter your search terms in the field provided, and then click the **Magnifying Glass icon**, or press **Enter**. To clear your search results, click the **red X icon**.
- A list of all subjects currently in your library displays. To expand a subject, click the **arrow** next to the subject you wish to expand
- To select multiple subjects, place a **check mark** next to each item you wish to exclude from your search results **(1)**. You can exclude entire subjects or subsets of those subjects. Once you've selected your subjects for exclusion, click on the **Click to Exclude Subjects** button **(2)**. The subjects will be moved to the **Excluded Subjects** portion of the screen **(3)**.
- BISAC Breakdowns
- Once you've selected all subjects that you want to be excluded, click **Next**.

The screenshot shows the 'Settings - Site Scoping' interface. At the top, there are navigation tabs: Library, Subjects, Properties, Authors, Publishers, Titles, and Confirm. The 'Subjects' tab is active. Below the tabs, there is a search bar with the text 'Search subject or ISBN...' and a magnifying glass icon. A checkbox labeled 'Only show subjects currently in library.' is checked. A list of subjects is displayed, including 'ANTIQUE & COLLECTIBLES', 'ARCHITECTURE', 'ART', 'American / African American & Black', 'American / Asian American', 'American / Hispanic & Latino', 'Annuals', 'Art & Politics', 'Asian', 'Australian & Oceanian', 'Body Art & Tattooing', 'Business Aspects', 'Caribbean & Latin American', 'Ceramics', 'Collections, Catalogs, Exhibitions', 'Color Theory', 'Conceptual', 'Conservation & Preservation', 'Criticism & Theory', 'Digital', and 'Environmental & Land Art'. A red callout '1' points to the 'ART' subject, which has a checkmark and a minus sign icon. A red callout '2' points to a red button with a right-pointing arrow, labeled 'Click to Exclude Subjects'. A red callout '3' points to the 'Excluded Subjects' list, which contains 'ARCHITECTURE', 'ART', 'Annuals', and 'Art & Politics'. Below the 'Click to Exclude Subjects' button is a green button with a left-pointing arrow, labeled 'Click to Include Subjects'. At the top right, there are 'Prev' and 'Next' buttons.

Scoping - Titles

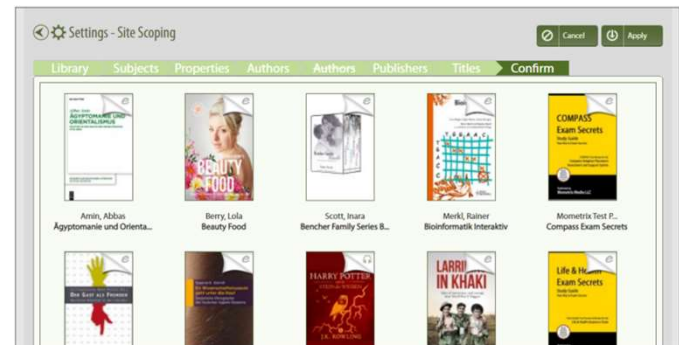


OR



Scoping – Confirm Selections

- The **Confirm** tab displays all titles that are excluded from your patrons.
- Hover over a book jacket to view details about the associated title, or to see how you excluded the title. Titles will be denoted by a specific icon depending on how they are being excluded. In the example below, the title has been excluded on the **Title** tab.
- Exclusion icons that you may see include:
 - PM - Purchase options
 - F - Format
 - L - Languages
 - P - Publishers
 - T - Title
 - Person icon - Audience
 - Quill pen icon - Author
- Click Apply to save changes



Next Steps

- Practice!
 - Consider creating featured lists for October and November
 - Think about programs you might want to create
- Keep watching for announcements on the E-Read Texas listserv
 - Email ebooks@tsl.texas.gov if you want to be added or to check your subscription
- More webinars coming in October 2024

Questions?

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E-Read Texas website:

<https://www.tsl.texas.gov/ldn/ebooks>



If you are watching the recording...

- Complete the Training Acknowledgement Forms to let us know your library completed the required training
 - https://bit.ly/ERT_2024Training
- The final screen of the form has links to download a fillable CE certificate
- Form can be completed more than once, so you can submit the form as you complete the training, or submit once after all trainings are complete