



E-Read Texas Boundless Training Session 2: Basic Admin

Karen McElfresh
Texas State Library and Archives Commission

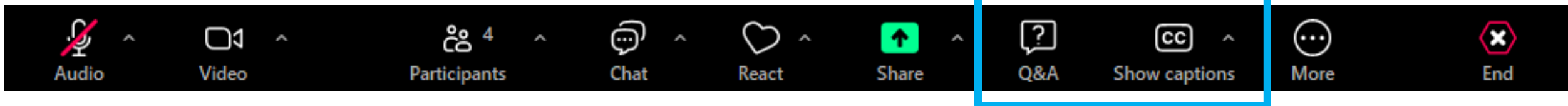
Jesse Wilson
Baker & Taylor

September 2024



Using Zoom

- Click 'Show Captions' to view the automated captions
- Submit questions using the Q&A panel



Download Slides

- Download a copy of the slides at <https://www.tsl.texas.gov/ldn/ebooks/training>
- Look for Session 2: Basic Admin
 - Click on 'Download Slides' link

Required Session 2: Basic Admin Training

A recording of the webinar will be posted for those that cannot attend live.

Session 2: Basic Admin Training (REQUIRED)

[Download Slides](#)

Topics will include:

- Creating admin user accounts
- Managing settings
- Accessing basic circulation statistics

Session Overview

- Basic Admin Training
 - Onboarding email
 - Will be sent to you between Sept. 11-16
 - Settings
 - Reports
 - Inventory
 - Users
 - Circulation
 - Legacy Reports
- Questions



Boundless Admin Site Review


Getting Started – Onboarding Email

Email will come from:

onboardingservices@baker-taylor.com

Areas of Interest

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

**SAMPLE**

Greetings Sue Smith,

Great news! We have completed your Boundless account and site setup. You will soon be able to place your first order and launch your new eBook platform.

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, and will provide assistance with placing your first order via Title Source 360.

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

Your Boundless ordering account number is 123456U7890012000000. This ordering account has been added to your Title Source 360 profile.

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

<https://abc123.boundless.baker-taylor.com>

Access to the library's **Boundless administration site** can be accessed via this URL:

<https://abc123.boundless.baker-taylor.com/admin>

Login to your Admin Site with these credentials:

Username: abc123ladmin

Password: #####

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

Digital Sales Manager

Account Assistance

For questions about orders and billing, please email us at 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 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/>

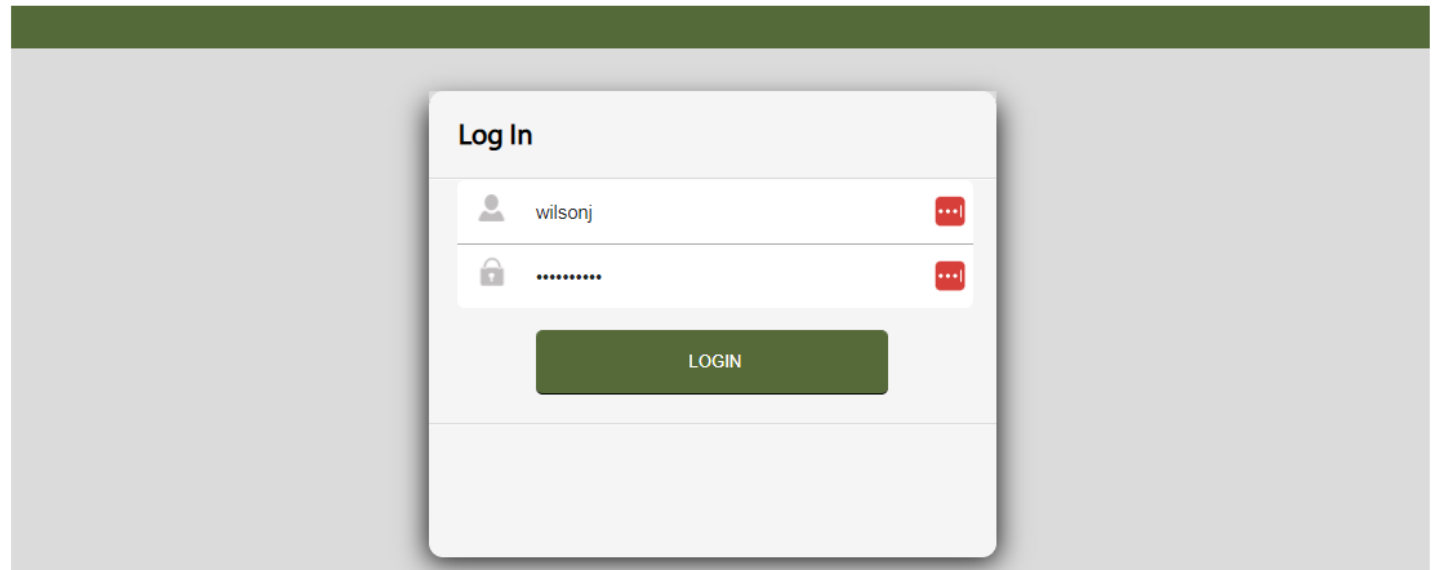
We hope that your Boundless experience is rewarding!

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

Admin Log-in Screen

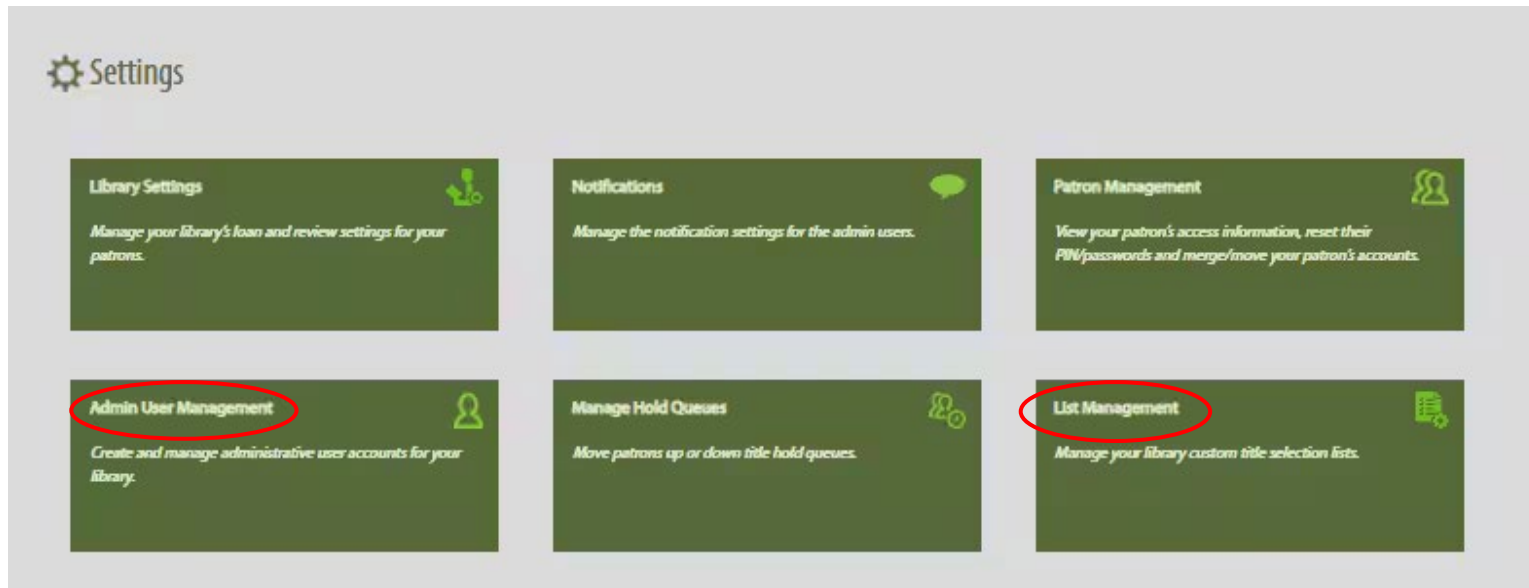
Tips & Tricks

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



The image shows a screenshot of the admin log-in screen. At the top left is the Boundless logo. At the top right is a 'Login' button with a power icon. The main content area features a white 'Log In' modal box with a dark green header. Inside the modal, there are two input fields: the first contains the username 'wilsonj' and the second contains masked characters '.....'. Both fields have a red 'show/hide' icon to their right. Below the fields is a dark green 'LOGIN' button.

Settings

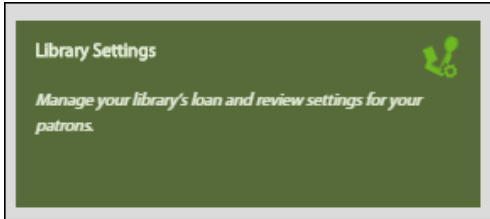


Use the Settings section to access and adjust your main library settings, including the following:

- **Library Settings** – Manage **Lending Settings** here.
- **Notifications**– Manage the notification settings for your admin users.
- **Patron Management** – Manage your patron accounts.*
- **Admin User Management** – Create and manage your admin accounts.
- **Manage Hold Queues** – Move patrons up or down the hold queue.*
- **List Management** - Create and manage custom reading lists for your patrons.

***Note:** Depending on your set up, you may have additional options that are not indicated in the screenshot below.

Settings – Lending Settings



Use the **Lending Settings** area to set lending limits for your patrons.

*Please note that for consortia member libraries, lending settings are set by your consortia administrator.

- Checkout Limit
- Hold Limit
- Hold Period
- Minimum Lending Period
- Maximum Lending Period
- Default Lending Period
- Renewal Notification Period
- Renewal Period

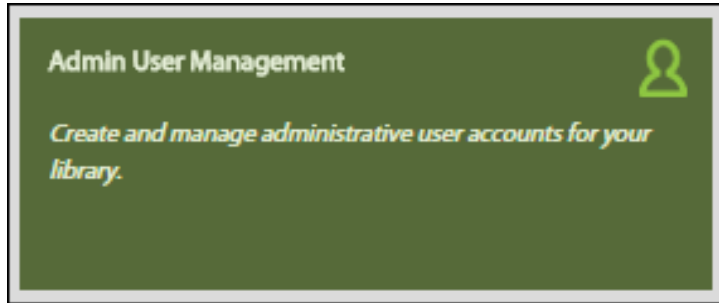
Lending Settings


Library Lending parameters are set by the Consortia. Please contact your Consortia Admin to request any changes to these parameters

Checkout Limit ? 20	Hold Limit ? Limited ▾ 10	Hold Period ? 3
Minimum Lending Period ? 21	Maximum Lending Period ? 21	Default Lending Period ? 21
Renewal Limit ? No Renewals ▾		

SAMPLE

Settings - Admin User Management



- Admin User Management lets you add, update, or activate/inactivate admin users.
- **Passwords** must be a minimum of 8 characters in length, with at least 1 uppercase letter, 1 lowercase letter, and 1 number.
- Permissions
- Editing Users
 - Click Pen Icon  on main page to update user information.

A screenshot of the "Create New User" form in the Admin User Management settings. The form includes fields for User Name, Password, Confirm Password, Email Address, Display Name, Department, and Notes. A red bracket on the right side of the form groups the Password, Confirm Password, and Email Address fields, with the text "Required Fields" next to it. Below the form is a section for Permissions with various checkboxes. At the bottom right, there are "Cancel" and "Save" buttons.

Settings - Admin User Management - Create New User

User Name

Password

Confirm Password

Email Address

Display Name

Department

Notes

Permissions

Access to Library Settings

Access to Patron/Student Management

Access Staff Picks

Admin Management

Access to Notifications

Access to Reports

Access to Customize Magic Wall

Access to Edit Logo


Access to Reviews









Access to File Upload

Access to Reservations

Access to Manage Hold Queue

Reports

 Home

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

Interactive Dashboard Reports



Account Contact Details Support Form Marketing Tools Help Log Off

Home Settings Reviews Reports Programs Library Admin

B&T Employee Site

Interactive Dashboard Reports

Inventory Reports

View, filter and drilldown into inventory data including circulations and holds

Circulation Reports

View, filter and drilldown into circulation details for titles in your inventory

User Reports

View, filter and drilldown into user and user activity details

Interactive Dashboard - Inventory Reports

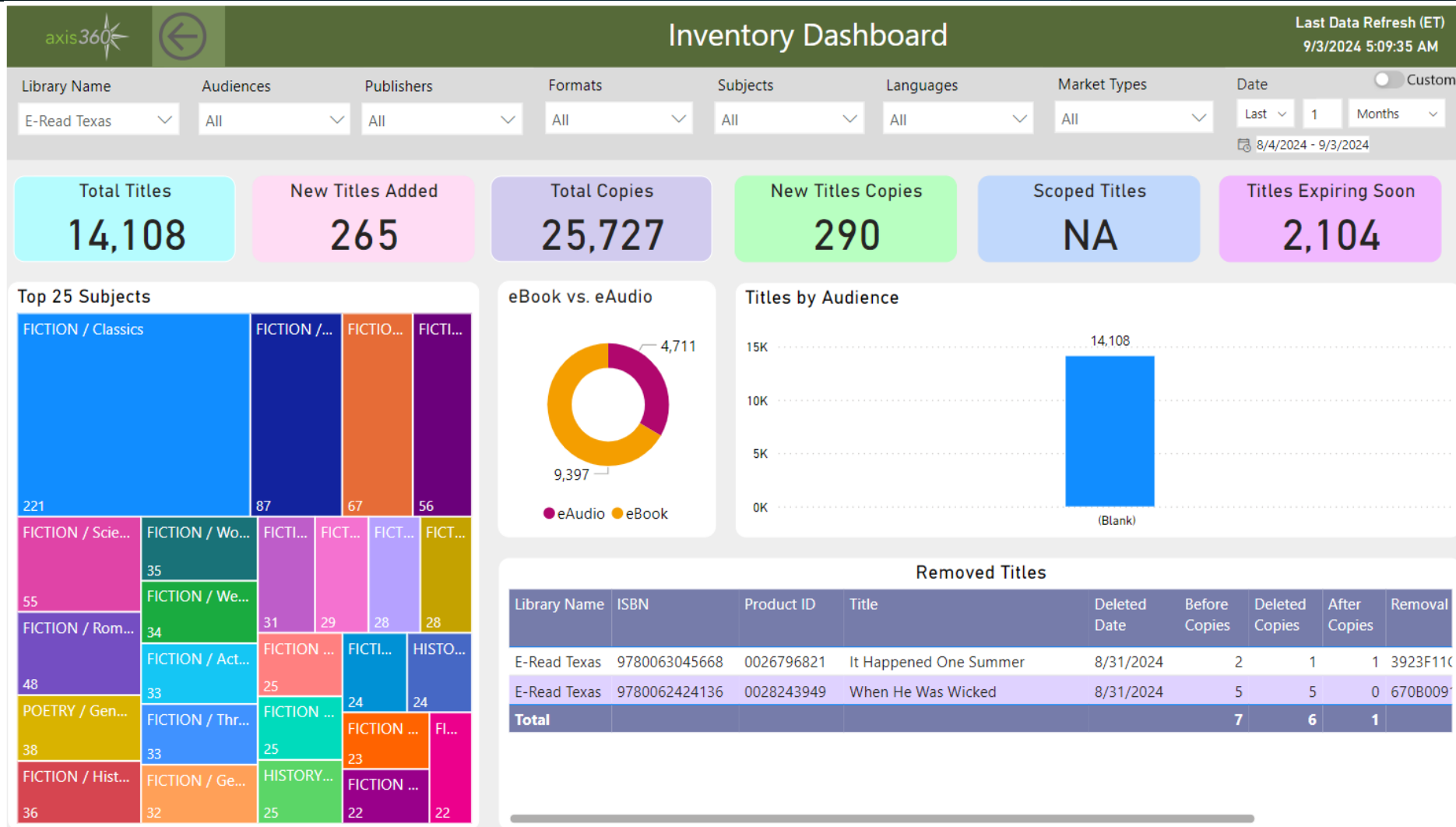
axis360

Inventory Reports

Last Data Refresh (ET)
6/25/2024 5:11:02 AM

- Inventory Dashboard
- Titles by Audiences & Subjects
- Inventory List
- Titles Transferred
- License Inventory
- Inventory List Summary
- Titles Expiring Soon
- Scoped Titles
- Removed Titles

Inventory Dashboard



Interactive Dashboard – User Reports



Users Reports

Last Data Refresh (ET)
6/25/2024 6:02:24 AM

User Dashboard

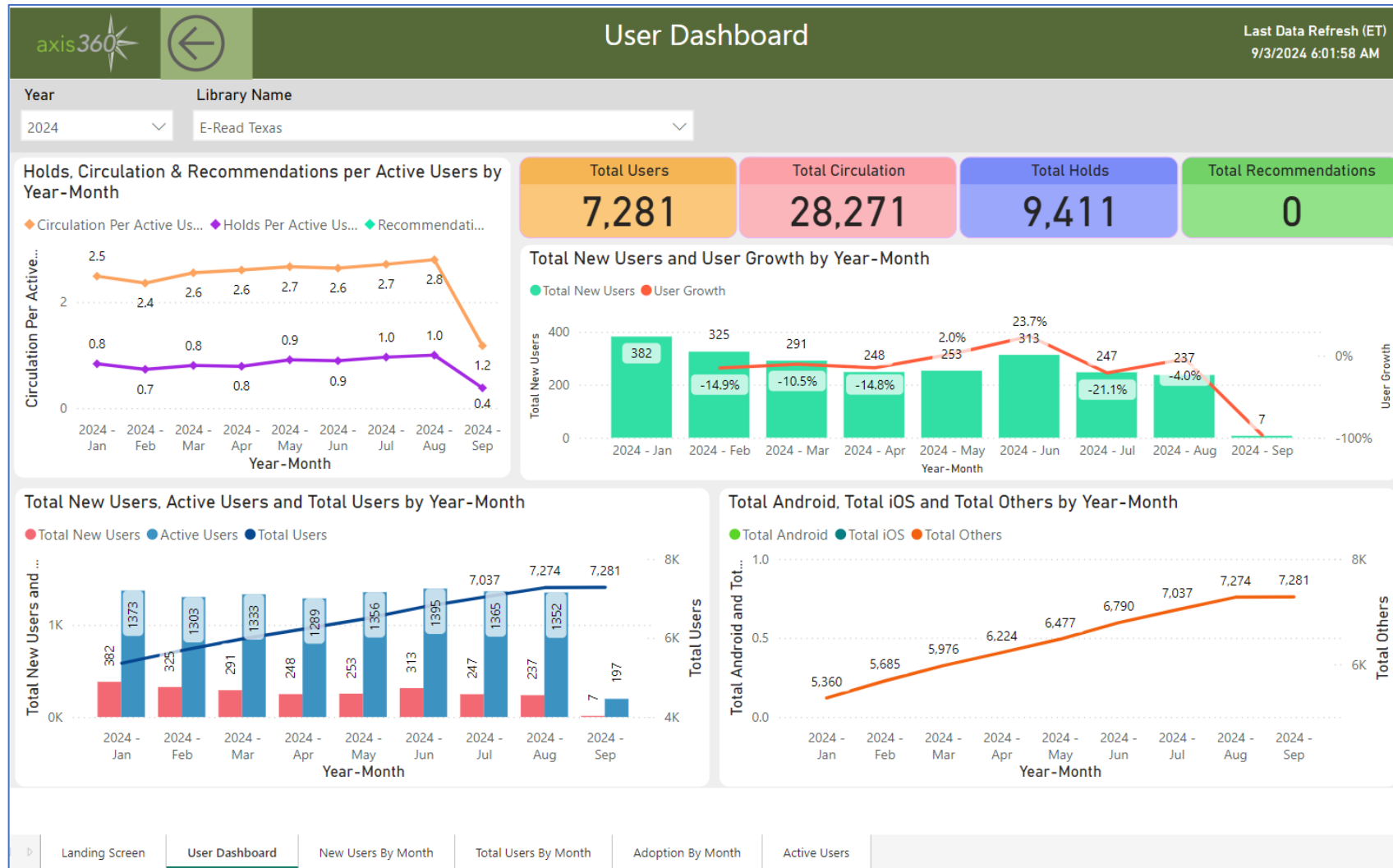
New Users By Month

Total Users By Month

Adoption by Month

Active Users

User Dashboard



Please note that Boundless does not provide individual IDs for these reports. It only shows number of users.

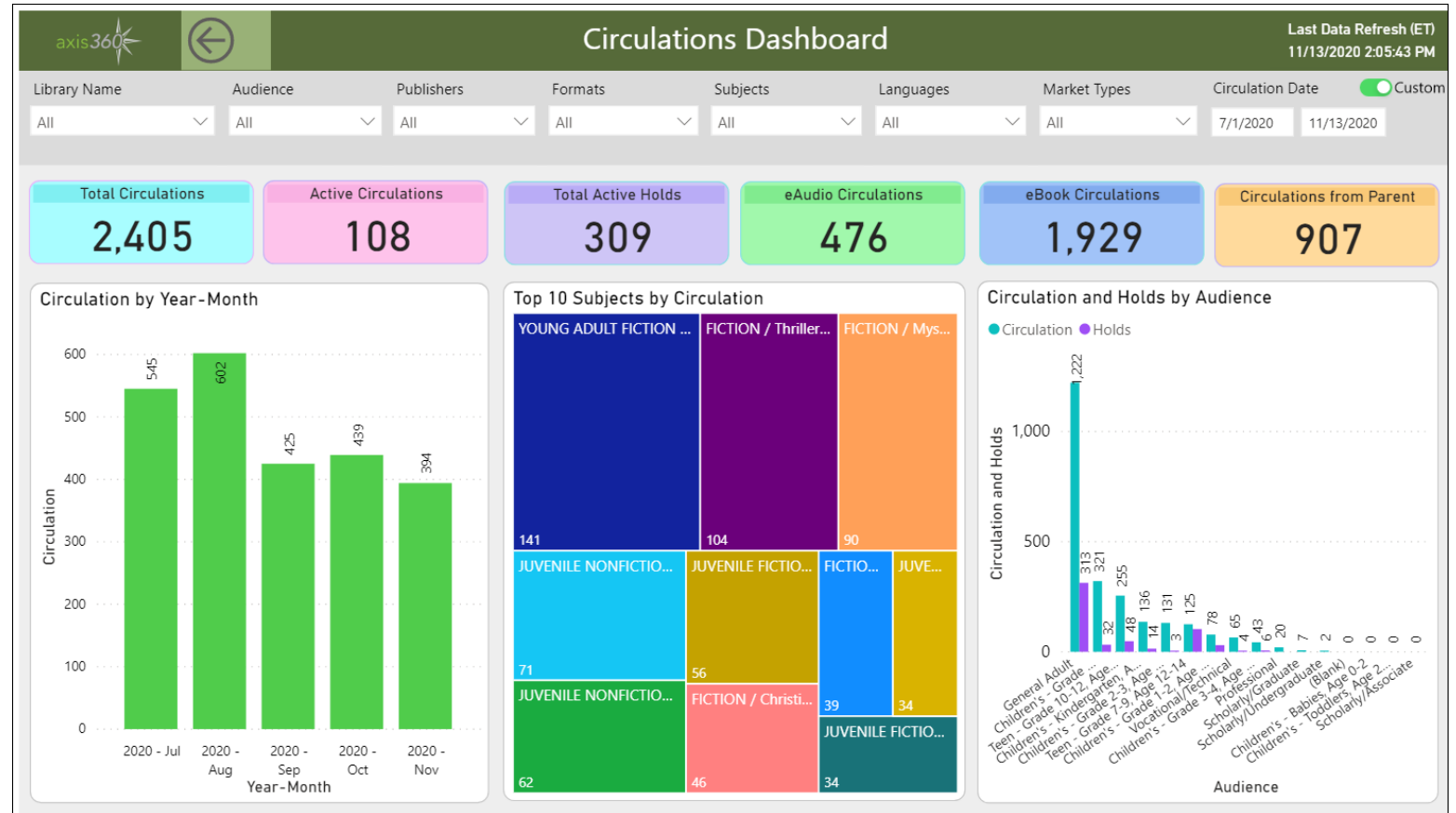
Interactive Dashboard - Circulation Reports

The screenshot displays a dashboard titled "Circulation Reports" with the "axis360" logo in the top left corner. The top right corner shows the text "Last Data Refresh (ET) 6/25/2024 4:09:40 AM". The dashboard is organized into a 3x3 grid of green buttons. The top-left button, labeled "Circulations Dashboard", is circled in red. The other buttons are: "Circulations Summary Statistics", "Circulations List", "Circulations by Library", "Title Circulations", "Circulations by Market", "Active Circulations", "Hold List", and "User Review".

Row	Column 1	Column 2	Column 3
1	Circulations Dashboard	Circulations Summary Statistics	Circulations List
2	Circulations by Library	Title Circulations	Circulations by Market
3	Active Circulations	Hold List	User Review

Circulation Dashboard

- This displays a high-level overview of all circulations for your library, based on the time frame and filters selected at the top of the page.
- Updated once a day.



Hold List

axis360
Hold List Last Data Refresh (ET)
9/3/2024 4:07:12 AM

Library Name:
Audience:
Publishers:
Formats:
Subjects:
Languages:

Add All To Cart
Add To Cart
 0

Hold List

In Cart	HoldRatio	Total Active Holds	Product ID	ISBN	Title	Patron Library Name	Transaction Library Name	Subj
	7.00	7	0029911285	9781639730087	A Court of Thorns and Roses	E-Read Texas	E-Read Texas	FICT Rom Actic
	6.67	20	0017890037	9781501110375	It Ends With Us	E-Read Texas	E-Read Texas	FICT FICT In
	5.50	11	0030814035	9781250899569	The Wedding People	E-Read Texas	E-Read Texas	FICT FICT Divo
	5.00	10	0030819150	9781250349705	The Wedding People	E-Read Texas	E-Read Texas	FICT Divo Hum
	5.00	5	0022005672	9781427287540	The Great Alone	E-Read Texas	E-Read Texas	FICT / Gei
	5.00	5	0031253108	9781797181288	We Used to Live Here	E-Read Texas	E-Read Texas	FICT Thrill Horr

Legacy Reports

Reports

Inventory List Report

Gives the details of your current inventory & current number of holds/checkouts on the titles.

Show Me How >

Inventory List Summary Report

Gives the summary of your current inventory & current number of holds/checkouts on the titles.

Circulation List Report

Gives the details of current circulation of titles in your inventory.

Show Me How >

Circulation List Summary Report

Gives the summary of current circulation of titles in your inventory.

Hold Report

Gives the details of titles currently on hold.

License Circulation Report

Outline how many licenses library owns? How many used? How many available? How many circulations?

Hold Summary Report

Gives the summary of titles currently on hold.

Active Checkout Report

Gives a snapshot of active checkouts at the time the report is generated.

Inventory Circulation By Month

Gives the details of circulation of titles in the given month.

Top 10 Circulating Subjects

Graphical presentation of top 10 subjects circulated in the given time.

User Review Report

Gives a list of all titles that contain patron reviews.

New Users By Month

Gives the details of new users in the particular month.

Total Users By Month

Gives the details of total users in the particular month.

New Users By Month Graph

Graphical presentation of new users in the particular month.

Total Users By Month Graph

Graphical presentation of total users in the particular month.

Inventory Report

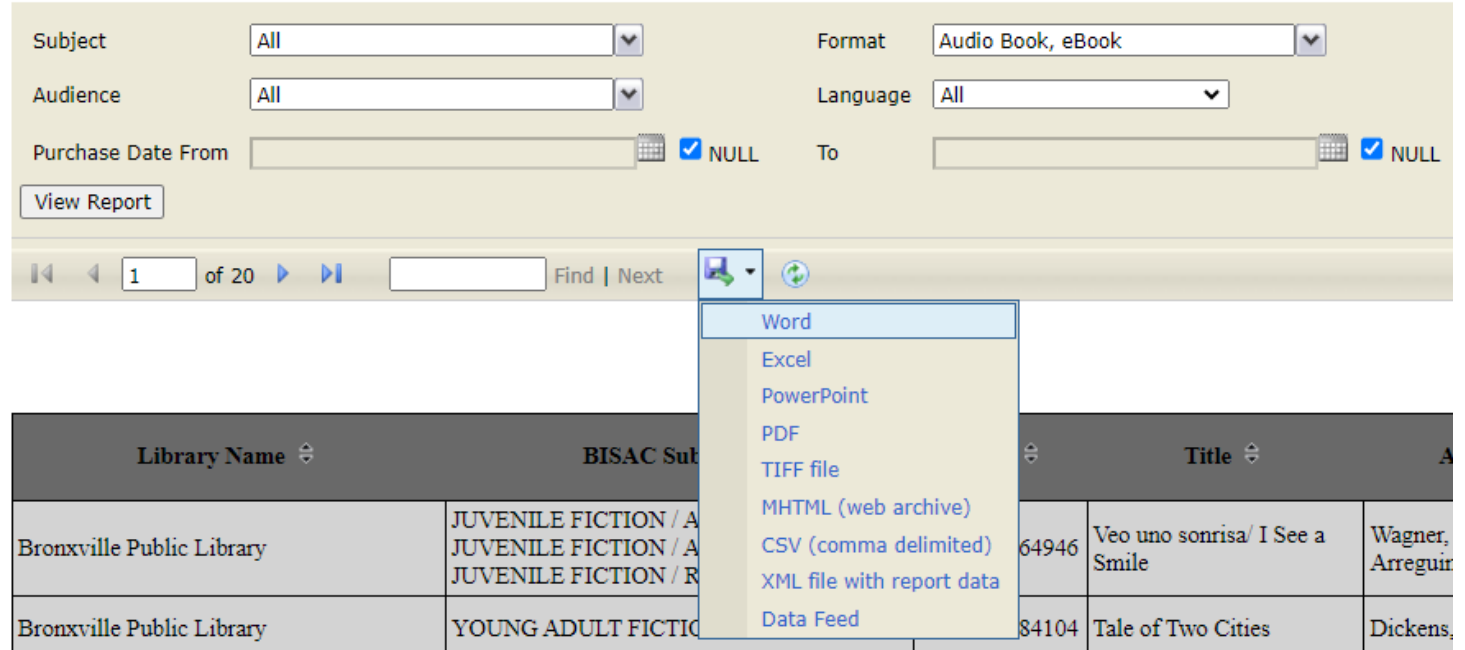
- Provides details of your current inventory
- To run this report, select your desired parameters from the fields below and then click **View Report**.
- **Subject** – Select the specific subjects to include in the report based on BISAC listings.
- **Audience** – Select the audience levels you would like to include in the report.
- **Purchase Date From** and **To** – Select a specific date range to view content purchased within that time frame.
- **Format** – Options are Audiobook and eBook.
- **Language** – When selected, only titles flagged with the corresponding language designation will display.

Inventory List Report



Gives the details of your current inventory & current number of holds/checkouts on the titles.

Inventory Report - Results



The screenshot shows a web-based interface for generating an inventory report. At the top, there are several filter options: Subject (All), Audience (All), Format (Audio Book, eBook), and Language (All). Below these are date range filters for Purchase Date From and To, both set to NULL. A 'View Report' button is located below the filters. The main area displays a table with columns for Library Name, BISAC Subject, Title, and Author. A dropdown menu is open over the table, listing various export formats: Word, Excel, PowerPoint, PDF, TIFF file, MHTML (web archive), CSV (comma delimited), XML file with report data, and Data Feed. The table shows two rows of data for 'Bronxville Public Library'.

Library Name	BISAC Subject	ISBN	Title	Author
Bronxville Public Library	JUVENILE FICTION / A JUVENILE FICTION / A JUVENILE FICTION / R	64946	Veo uno sonrisa/ I See a Smile	Wagner, Arreguir
Bronxville Public Library	YOUNG ADULT FICTIO	84104	Tale of Two Cities	Dickens,

- Library Name, BISAC Subject, ISBN, Title, Author, Publication Date, Publisher, Date Added, Format, Total Quantity, On Order Quantity, Total Checkouts, Turns, Holds, Hold Ratio
- Can export into a spreadsheet or other file types seen above.
- Real-time information.

Inventory Report

Library Name	BISAC Subject	ISBN	Title	Author	Publication Date	Publisher	Audience	Date Added	Format	Total Quantity	On Order Quantity	Member Quantity	Parent Quantity	Total Checkouts	Turns	Holds	Hold Ratio
E-Read Texas	BIOGRAPHY & AUTOBIOGRAPHY / Memoirs; SOCIAL SCIENCE / Emigration & Immigration; BIOGRAPHY & AUTOBIOGRAPHY / Social Scientists & Psychologists	9780062941978	Book of Rosy/ El Libro De Rosy	Cruz, Rosayra Pablo ; Collazo, Julie Schwietert	6/2/2020	HarperCollins	General Adult	7/11/2022	eBook	1	0	1	0	1	1.00	0	0.00
E-Read Texas	HEALTH & FITNESS / Alternative Therapies; HEALTH & FITNESS / Herbal Medications; HEALTH & FITNESS / Healthy Living & Personal Hygiene	9781454934646	Cbd	Brown, Blair Lauren ; Leyland, Chelsea (FRW)	1/18/2022	Sterling Pub Co Inc	General Adult	9/14/2022	eBook	1	0	1	0	0	0.00	0	0.00
E-Read Texas	TRAVEL / Asia / East / China; TRAVEL / Food, Lodging & Transportation / General	9781640971301	Fodor's Essential China	Fodor's Travel Publications, Inc. (COR)	4/16/2019	Lightning Source Inc	General Adult	7/11/2022	eBook	10	0	10	0	0	0.00	0	0.00
E-Read Texas	FICTION / Mystery & Detective / General; FICTION / Thrillers / Crime; FICTION / Thrillers / Suspense	9788413140582	Muerte en el seminario/ Death in the Seminary	James, P. D. ; Ciocchini, Mª Eugenia (TRN)	5/16/2019	Penguin Random House Grupo Ed	General Adult	9/14/2022	eBook	1	0	1	0	0	0.00	0	0.00
E-Read Texas	FICTION / Classics; FICTION / Literary	9781982672898	Actual	Bellow, Saul	7/16/2019	Blackstone Pub	General Adult	8/4/2022	Audio Book	3	0	3	0	0	0.00	0	0.00
E-Read Texas	FICTION / Thrillers / Espionage; FICTION / Thrillers / Suspense; FICTION / Mystery & Detective / International Crime & Mystery	9780593151938	Agent Running in the Field	Le Carre, John	10/22/2019	Random House Digital	General Adult	9/14/2022	Audio Book	1	0	1	0	1	1.00	0	0.00

Legacy Reports – Breakdown

Most used

- **Inventory List Report** - provides details of your current inventory
- **Circulation List Report** - provides details regarding the current circulation of titles in your inventory
- **Hold Report** - provides details for all titles that are currently on hold by your patrons
- **Active Checkout Report** - a list of all active check outs at the time the report is generated
- **Top 10 Circulating Subjects Report** - at-a-glance look at the top ten subjects that have circulated within a given time frame
- **New Users By Month Report** - details of new users for the desired month
- **Total Users By Month Report** - details of all patron activity within a given month

Other Reports

- **Inventory List Summary Report** - abbreviated snapshot of your current inventory
- **Circulation List Summary Report** - abbreviated snapshot of your current circulations
- **Hold Summary Report** - abbreviated snapshot of your current circulations
- **Inventory Circulation by Month Report** - detailed information regarding circulating titles, broken down by month
- **User Review Report** - list of titles that your patrons have reviewed
- **New Users By Month Graph Report**
- **Total Users By Month Graph Report**
- **Adoption By Month Report** - details how many of your patrons are using the Boundless app, as well as which operating system they are using
- **Adoption by Month Graph Report**
- **Active Users Report**
- **Total Active Users Graph Report**

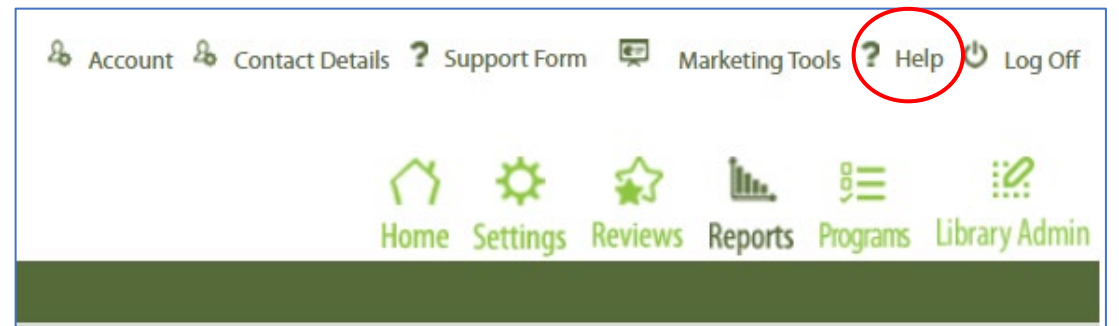
Support for Admin Interface

TSLAC Direct Support

- Link to a support request form will be added to <https://www.tsl.texas.gov/ldn/ebooks> by Oct. 1

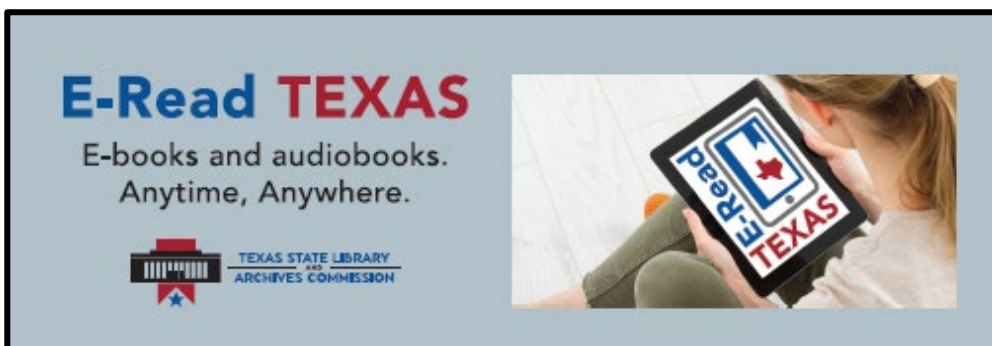
Boundless Support

- Admin Help Links
 - <https://baker-taylor.my.site.com/boundlessadmin>
- Digital CSM
 - Jesse.wilson@baker-taylor.com



Promotion & Marketing

- New promotional materials from TSLAC!
 - <https://www.tsl.texas.gov/ldn/ebooks/promotion>
 - Updated bookmarks and half-sheet flyer
 - Order materials here: <https://bit.ly/ERTSupplies>
 - Will not ship until September
- [Printable flyer with FAQ about transition](#)



Introducing Boundless!

The E-Read Texas program is moving from the SimplyE app to Boundless on October 1, 2024. The Boundless app offers the same features as SimplyE, alongside new and improved features such as wish lists, notifications and reminders, and the ability to pause holds. You'll also be able to set reading goals and track your progress!

Why are we moving to the Boundless app?

The E-Read Texas program is administered by the Texas State Library and Archives Commission (TSLAC). TSLAC recently reviewed the contracts associated with the E-Read Texas program and determined that the Boundless platform offers more value to Texas libraries.

Can I still find my library's Overdrive or CloudLibrary content in the new app?

No. If your library purchases e-books/audiobooks from Overdrive (Libby) or CloudLibrary, they will NOT appear in Boundless. If you would like to access e-books/audiobooks from Overdrive and/or CloudLibrary, you will need to use the mobile app associated with that provider.

What do I need to do?

Continue using SimplyE through September 30. If you can, finish reading/listening to any books you have checked out by September 30. On October 1, follow the steps on the reverse side of this handout to download the Boundless app and log in. Then begin checking out and accessing your items in Boundless!

What if I'm in the middle of a book on SimplyE when we transition to Boundless?

Checkouts WILL NOT transfer from SimplyE to Boundless. We recommend that you try to finish your book by September 30, if possible.

If you can't finish your book, check to make sure the book has been downloaded to your device before September 30. Your downloaded books will not disappear until your original checkout period ends, so you will be able to finish reading/listening to your book. For example, if you check out a title on September 23, you will have access to that title in SimplyE for 21 days, or until October 14.

After October 1, you will not be able to checkout any new items in or download any previously checked out items. SimplyE will be taken completely offline on October 31.

I have books on hold. Will my holds be transferred to Boundless?

Holds should transfer to Boundless, but you may want to make note of what titles you have on hold prior to September 30, just in case something doesn't transfer.

How do I get help with Boundless?

Contact the staff at your local library for assistance with the Boundless app.

Promotion & Marketing

- Resources from Baker & Taylor:
 - <https://www.baker-taylor.com/public/boundless-resources>
 - Customizable versions



**Check out, read and listen
— all in one app**

Download the
Boundless app
today

Next Steps

- Watch for welcome email from Baker & Taylor
 - Will be sent between Sept. 11-16
 - Contains your Boundless site URL and admin login credentials
- 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
- Pop-up announcements will appear in SimplyE starting Sept. 9 to let patrons know about the upcoming change

Training Sessions 3

- **Session 3: Advanced Admin (Sept. 17, 19, or 20)**
 - Optional
 - Topics: Customization, collection curation, program setup

Recordings and Registration links:

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

Questions?

Karen McElfresh

Resource Sharing Projects Coordinator
Texas State Library and Archives Commission
ebooks@tsl.texas.gov

<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