


E-Read Texas Boundless Training Session 1: App Overview


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August 2024

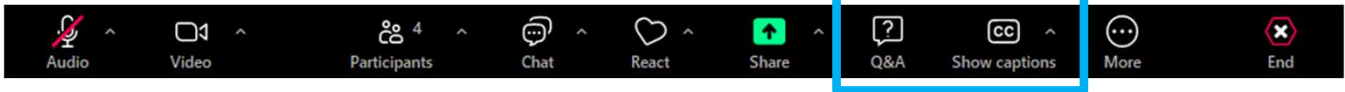


1



Using Zoom

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



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Migration Timeline

- May 2024 – contract award and announcement to libraries
- June - July 2024 – collecting implementation information from participating libraries
- August 2024 – library staff training #1
- September 2024 – library staff training #2 and #3, site testing
- October 2024 – rollout to patrons on October 1!

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

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Session Overview

- Boundless App Overview
 - Downloading app and signing in
 - Setting up your account and profiles
 - Searching for books
 - Downloading and accessing books
 - Joining a program
 - Submitting problems and feedback
- Questions

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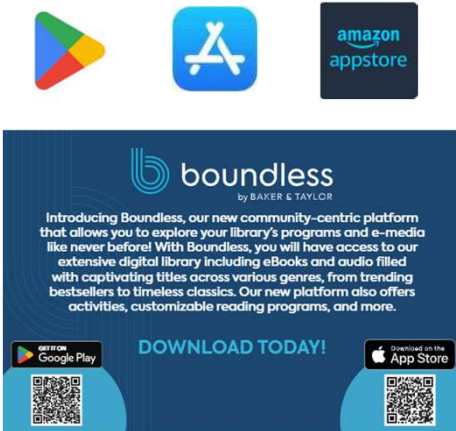
Boundless App Overview



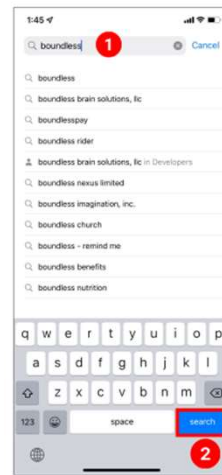
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Download Boundless on your Mobile App

To download the Boundless app, open the Google Play Store, Apple App Store, or Amazon App Store from your device.



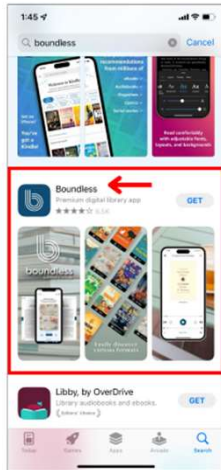
Find the app by **typing in Boundless (1)** and tapping **Search (2)**.



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Download Boundless on your Mobile App Continued

Tap on the app to open up the app details page.



Click on the **Get** or **Install** button to download the app to your mobile device.

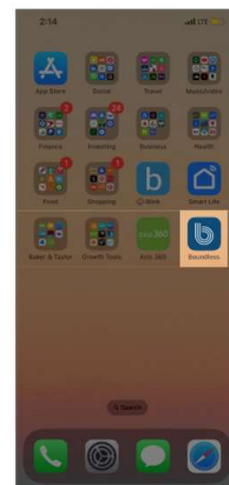


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Download Boundless on your Mobile App Continued

The app will then download, and the Boundless icon will display on your device's home screen.

Note: Make sure you have auto update activated on your phone or you will have to manually check for updates.

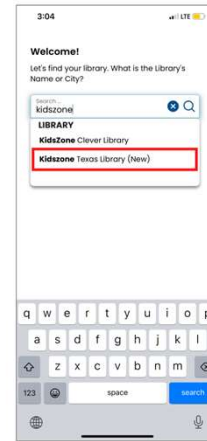
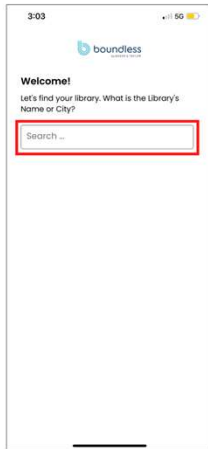


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Find your library on the Mobile App

Download and open the Boundless app, then **Search** for your library using the main library's name or city.

Select your library from the provided drop down list.



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Finding your Library and Logging In

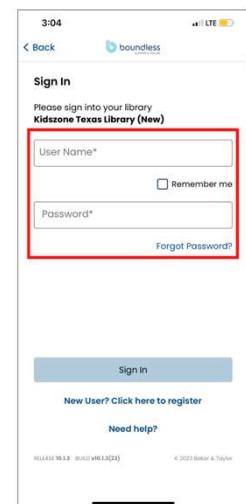
Click on your library.



Enter your **login info** then tap **Sign In**. You can select the "remember me" checkbox to avoid logging in each time you access the app. It is suggested that you do not select this option if you share your device with another user.

Library logins will vary depending on which method of authentication your library has chosen for logging into the app.

NOTE: If you have not logged in for 45 days Boundless will ask you to reauthenticate.



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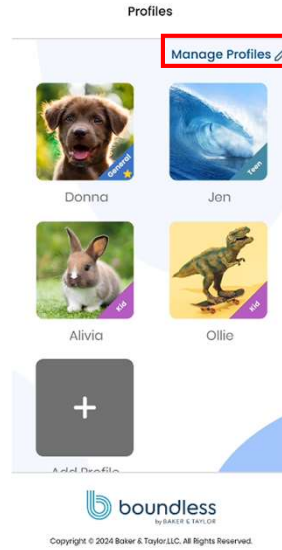
Creating a Profile

Once you have logged in, you will land on the Profiles page.

Each library card holder may choose to create up to 5 different profiles within their account.

This allows for the barcode owner to share their account with other individuals such as children or family members.

Checkout and Hold limits will apply to all profiles in aggregate



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Creating a Profile Continued

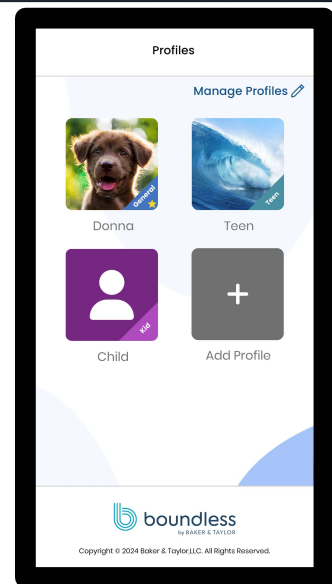
You can now create user profiles within your digital library account! This feature is perfect for guardians sharing their account or those wanting to change their library experience.

Each profile can be customized based on age range.

Profiles provide a separate experience for each user, but all profiles will be linked to your single library barcode account.

This means that profiles share one account, and library controls (such as checkout limits, hold limits, etc.) will be shared across profiles.

For example, if a library has a checkout limit of 12 items, then this would allow for 12 checkouts in total across all your profiles.



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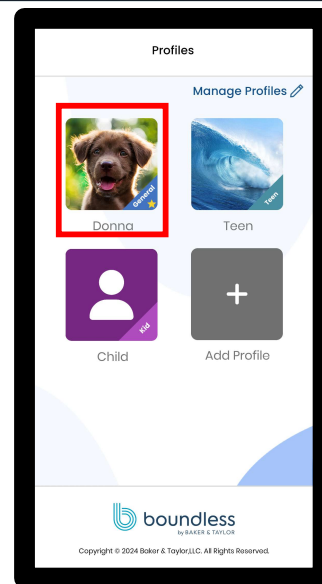
Creating a Profile Continued

The **Primary profile** is the profile that controls the entire digital library account. There will only ever be ONE Primary profile per library cardholder account. The Primary profile has access to account settings that no other profiles will have.

These settings include account controls such as Auto-Checkout Available Holds and Enabling PINs for all Profiles.

By default, the Primary profile will have access to ALL content available from your library; however, this profile can still be customized to the users preferences as previously mentioned.

With Boundless, users have the ability to create 3 different types of profiles.



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Creating a Profile Continued

With Boundless, users have the ability to create 3 different types of profiles.

1. Kid Profiles

Kid profiles are suggested for anyone between the ages of 0-11. These profiles display digital content with Kid audience levels.

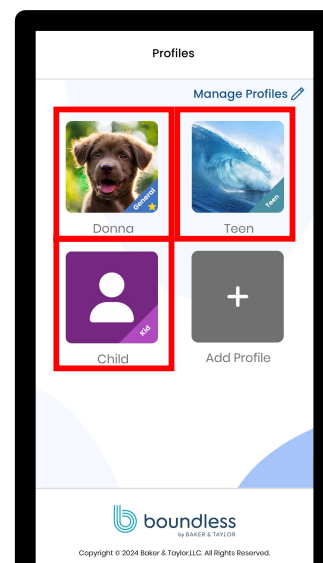
2. Teen Profiles

Teen profiles are suggested for anyone between the ages of 12-18. These profiles display digital content with Teen and Kid audience levels.

3. General Adult Profiles

General Adult profiles are suggested for anyone of the age 18+. These profiles display digital content with Kid, Teen, and General Adult audience levels.

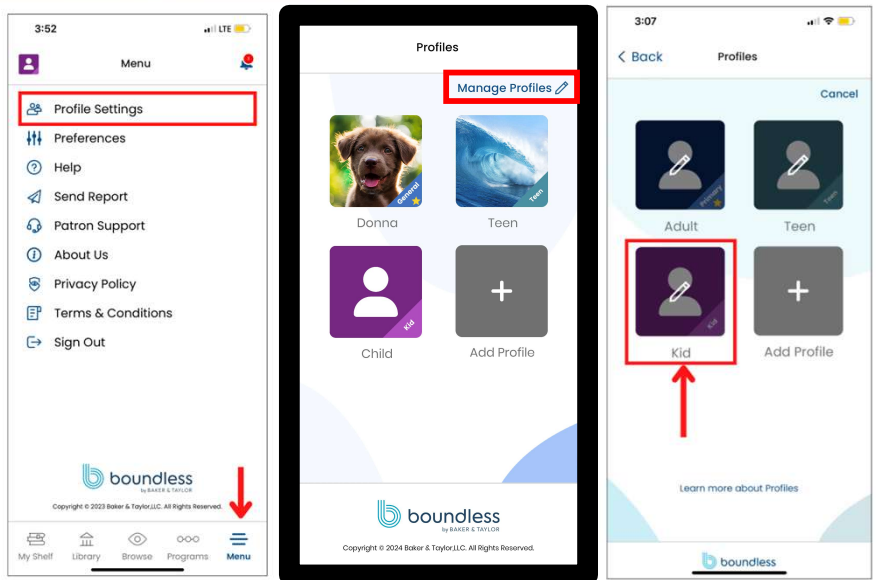
4. Click Add Profile to add more profiles. You can have up to 5.



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Managing a Profile

Navigate to your Profile Settings page from either within the profile or from the Profile management screen



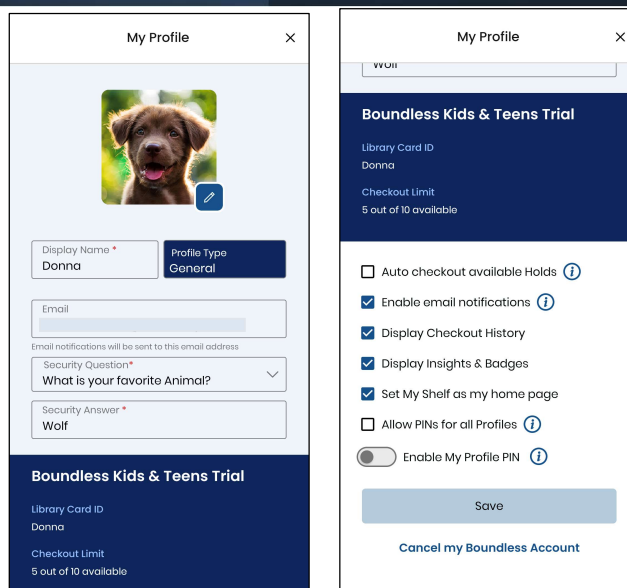
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Managing a Profile

Within your settings page, you can change your profile image, edit your name and email, enable profile features, and view your library borrowing limits.

Make any desired changes to your profile, then click **Save**.

Please note that the profile controls and settings may vary by profile.

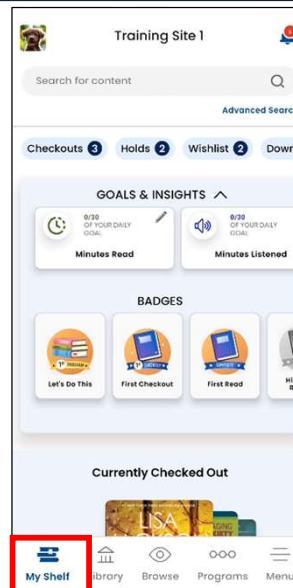


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My Shelf

My Shelf is where all of your personal content and recommendations will be displayed. Here, you can easily access any Programs that you have joined, as well as your *My Stuff* which contains all of your Checkouts, Holds, Wishlist, and more! You will also see customized carousels on your My Shelf page created from your reading activity, interests, and history.

If you would like to set your My Shelf page as your home page, you can do this from within your [Profile Settings](#).

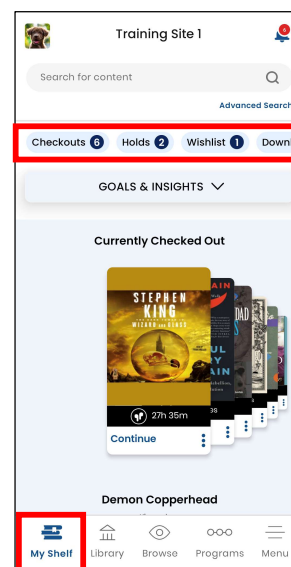


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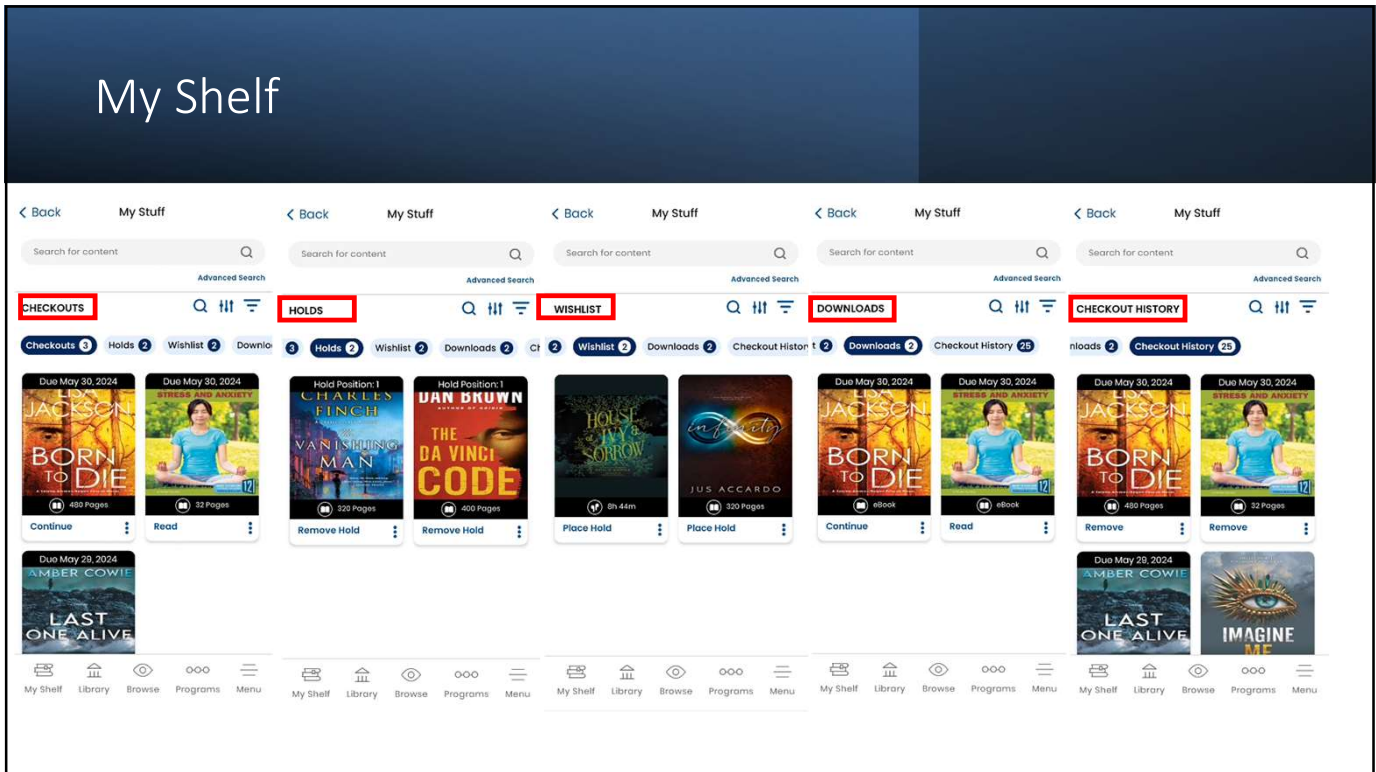
My Shelf

Select the **My Shelf** tab from the Footer Menu.

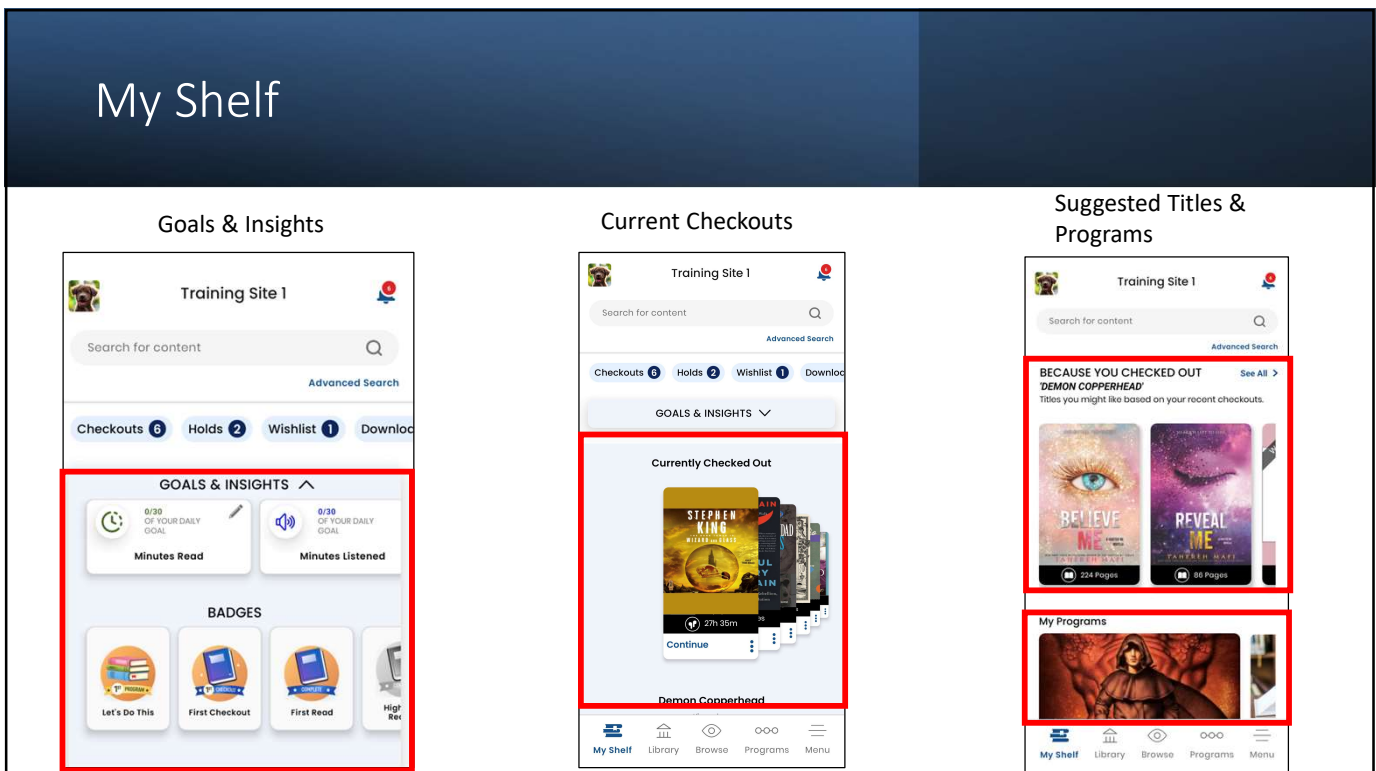
At the top of the page, you will see pill shaped buttons for all of your **My stuff** content, including Checkouts, Holds, Wishlist, Recommendations, and History.



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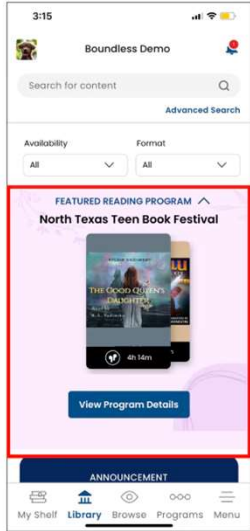
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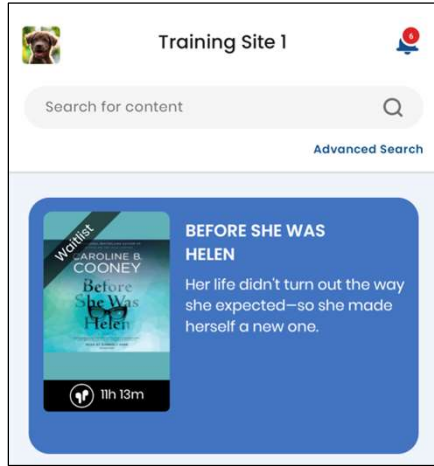
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Library

Featured Program



Book of the Month

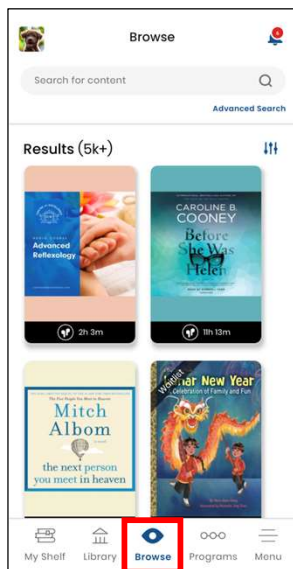


Announcements

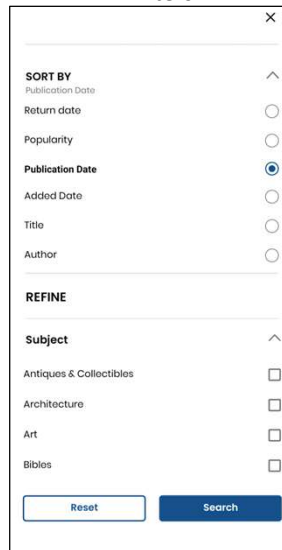


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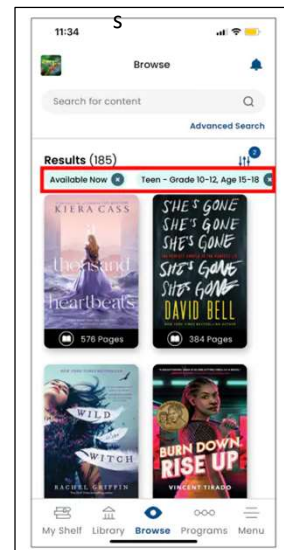
Browse



Filters

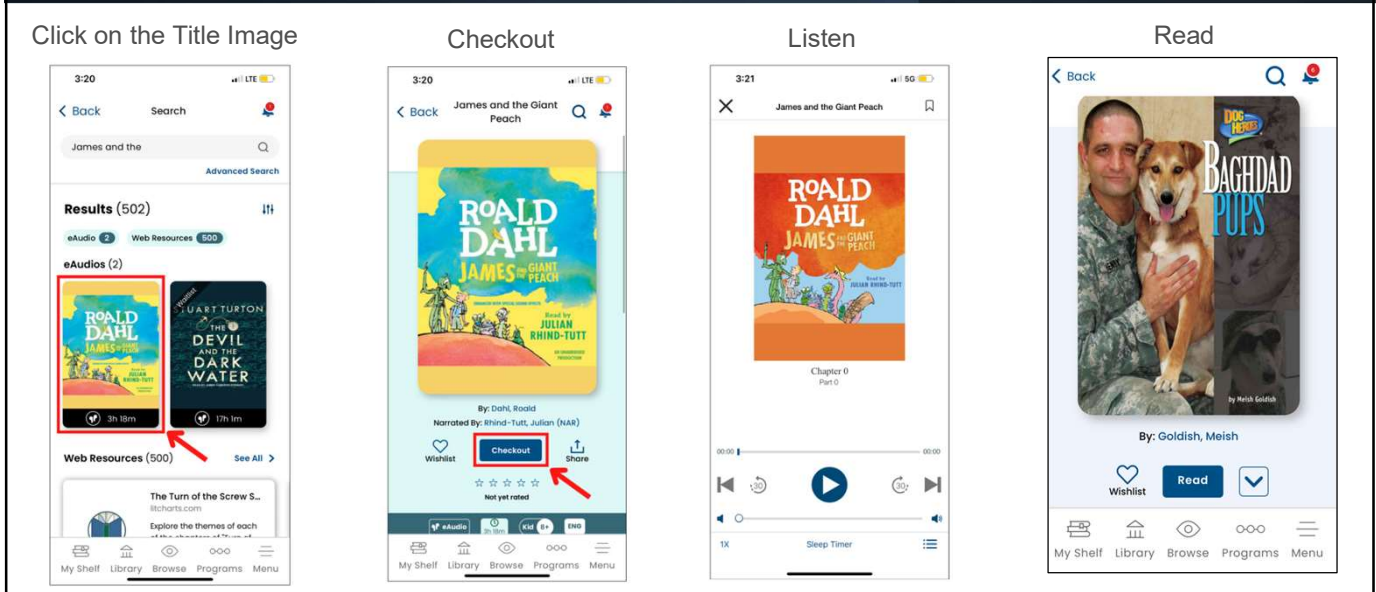


Result



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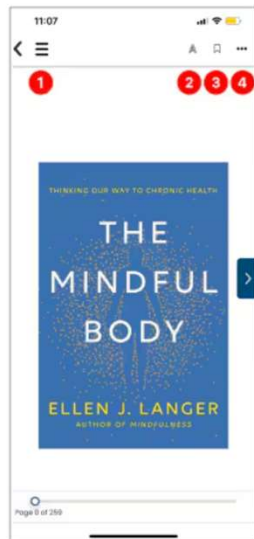
Check out a title, listen or read



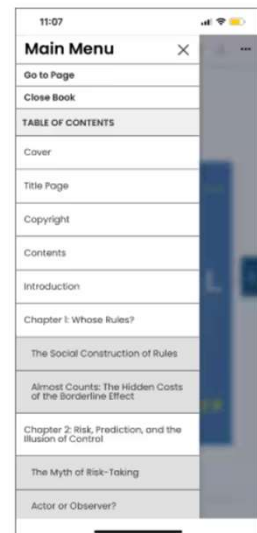
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Reader experience

You can customize your experience through the options provided by tapping the top of your screen.

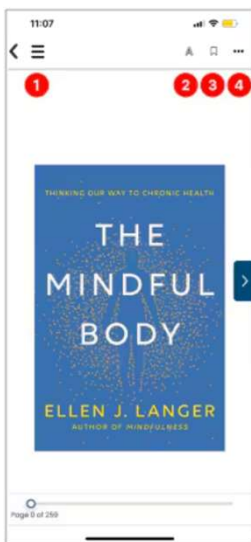


1. Navigate through the book using the table of contents



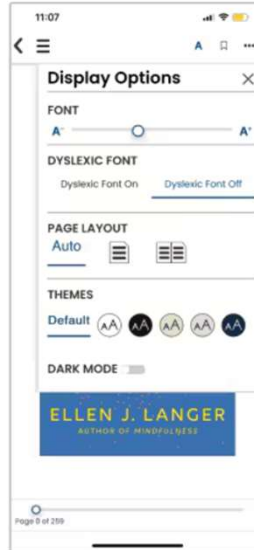
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Reader experience



2. The functionalities offered in the display options will vary depending on whether you have a picture book or not.

For non-picture books, you will have options for font, page layout, theme colors, and dark mode.



For picture-books, you will only have page layout and theme options.



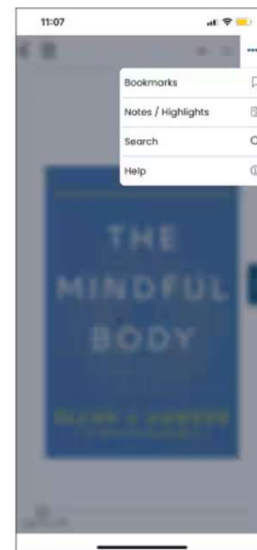
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Reader experience



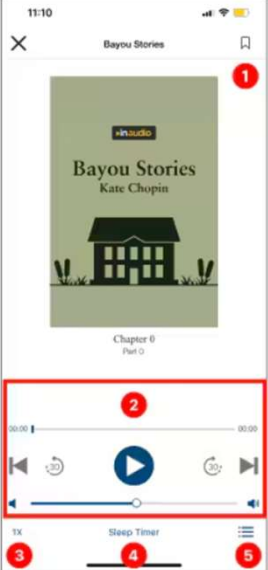
3. Add a bookmark to the current page

4. View bookmarks, Add notes & highlights, Search or access Help

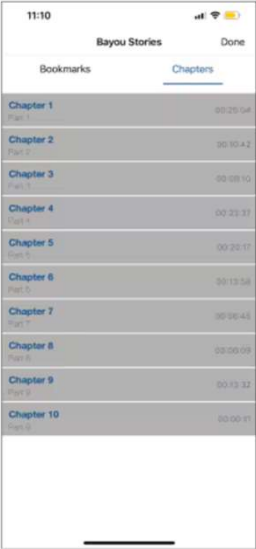


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Listener experience



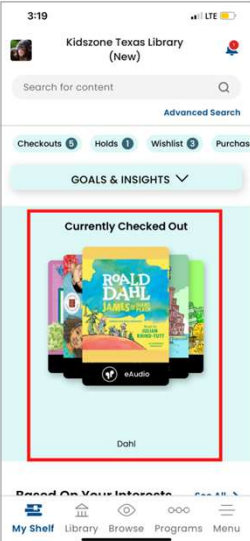
1. Add bookmark to current page
2. Player controls
 - a. Chapter progress bar
 - b. Previous chapter
 - c. Rewind 30 sec
 - d. Play/pause
 - e. Fast forward 30 sec
 - f. Next chapter
 - g. Volume adjuster
3. Adjust the playback speed
4. Set a sleep timer
5. View chapters & bookmarks

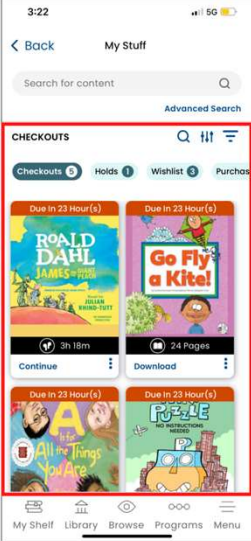


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Where to find checked-out material

All of your checkouts will display in a carousel on your **My Shelf** page as well as in your **Checkouts** tab within **My Stuff**.





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Programs

The first screenshot shows the 'My Programs' tab with a red arrow pointing to the search bar. The second screenshot shows the 'Open Programs' tab with a red arrow pointing to the search bar. The third screenshot shows the 'Reading Program' details for 'Summer Reading' with a red arrow pointing to the 'Join Program' button. The fourth screenshot shows the 'Reading Program' details for 'Best Sellers' with a red arrow pointing to the 'Leave Program' button.

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Programs

There are 3 types of programs

You must read X of Y books

This screenshot shows a 'Reading Program' titled 'Best Sellers'. It includes a progress bar and a goal of '3 of 6 Titles'. The 'Titles (6)' section displays book covers for 'MURTAGH' by Christopher Paolini and 'POWERLESS' by Lauren Roberts.

You must read the books in order

This screenshot shows a 'Reading Program' titled 'Mysteries'. It includes a goal of 'Books in Order' and a 'Titles (6)' section with two numbered book covers: '1 HARLES FINCH VANISHING MAN' and '2 AGATHA CHRISTIE HALLOWEEN PARTY HAUNTING VENICE'.

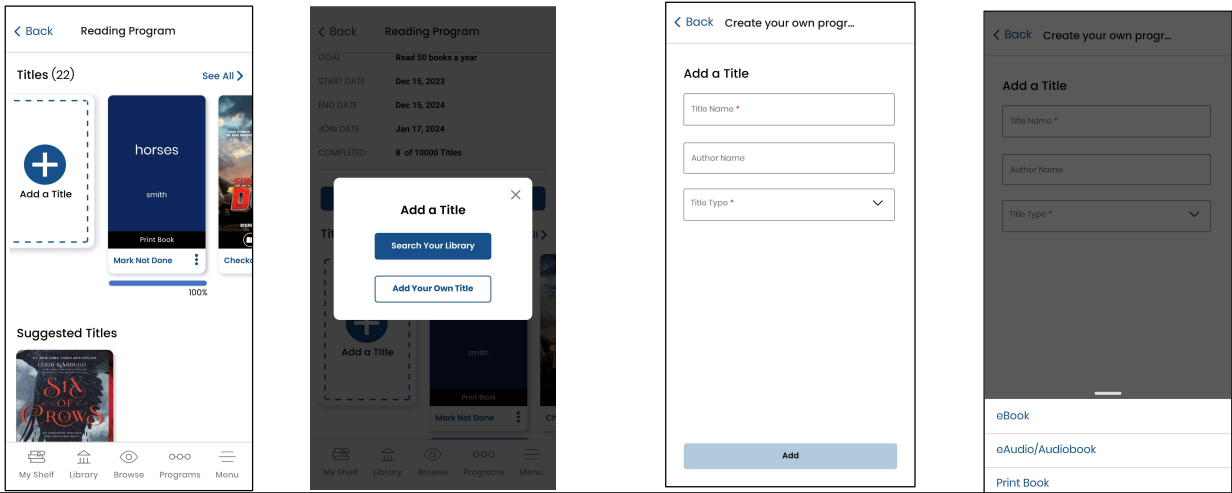
You can create your own.

This screenshot shows a 'Reading Program' titled 'Create your own program'. It includes a goal of 'Read 50 books a year' and a 'Titles (22)' section with a search bar containing the word 'horses'.

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Milestone Program

If you have joined a Milestone program, you will can add titles to your reading list. The Milestone program details page includes an 'Add Title' option and may also display a list of titles suggested by your library.



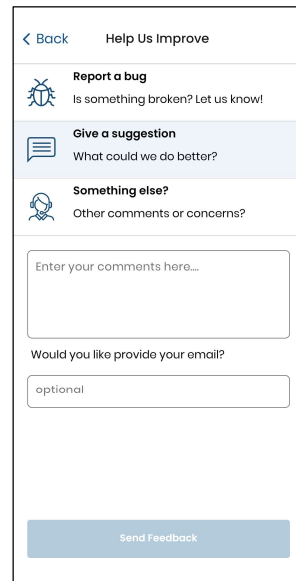
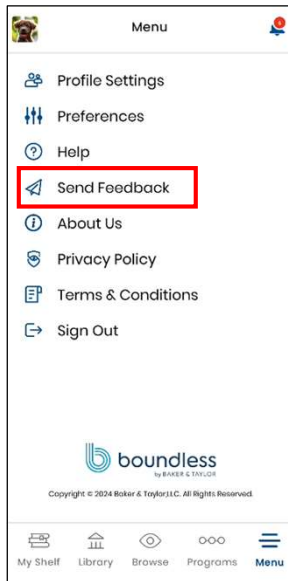
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Menu

The Menu tab is home to all things related to accounts and settings.

Manage your preferences, access help, and view other important information. This is also where you can sign out of the Boundless app.

We also welcome your feedback about the Boundless App.



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Next Steps



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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?

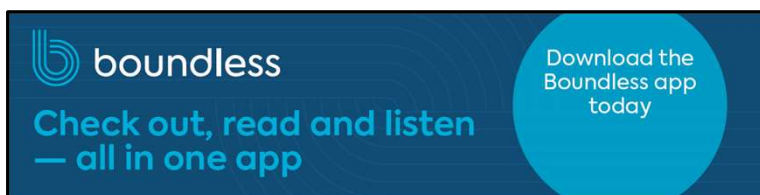
Contact the staff at your local library for assistance with the Boundless app.

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Promotion & Marketing

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



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Next Steps

- 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
- Your Boundless site details will be sent to you in early September!
 - Watch for a welcome email from Baker & Taylor
- Announcements will appear in SimplyE starting Sept. 9 to let patrons know about the upcoming change

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Training Sessions 2 & 3

- **Session 2: Basic Admin (Sept. 4, 6, or 10)**
 - **REQUIRED**
 - Director or whomever will have primary responsibility for Boundless should attend
 - Topics: Site settings, circulation reports, etc.
- **Session 3: Advanced Admin (Sept. 17, 19, or 20)**
 - Optional
 - Topics: Customization, collection curation

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

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Questions?

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Texas State Library and Archives Commission
ebooks@tsl.texas.gov

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



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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