Get Started Guide

Version 5.1

Welcome

This guide is a general manual for setting up and maintaining your Syndetics Unbound subscription. We will walk you through the initial account set-up, including: uploading your holdings data, configuring the enrichments, and installing Syndetics Unbound in your OPAC.

Getting Help

At any time in the Syndetics Unbound Admin, you can click the blue "Help" icon on the upper right-hand side of the screen, for step-by-step explanations unique to the page you're on and tailored to your ILS or OPAC, when applicable.

Do you have a question that can't be answered by this guide or through the Help sections in the Syndetics Unbound Admin? Contact our technical support team by emailing PQ-techsupport1@clarivate.com.

LibGuide

Syndetics Unbound has a LibGuide that offers:

- Training and support to set up and maintain the product
- Promotional materials
- Curated Book Display Widgets which you can easily copy and use yourself

Visit it here: https://proquest.libguides.com/syndetics/

Email User Group

The Syndetics Unbound email user group, hosted by Google groups, includes:

- Announcements of new content and features
- Opportunities to ask questions and influence the direction of the product
- System updates and technical announcements

Join here: https://groups.google.com/forum/#!forum/syndetics-unbound/join

Getting Started

Overview

Setting up Syndetics Unbound is easy.

You'll need the **login information** to your Syndetics Unbound admin account, which can be found in the **welcome email** you received.

The basic steps are highlighted in the **Install Checklist** you'll see on the main page of your Syndetics Unbound Admin:

1. OPAC Settings: Configure a few settings, like how to link between items.
2. Cover Settings: Use your client code to enable covers in your ILS.
3. Holdings: Upload your library's holdings to us, so we know which titles we can link to and recommend.
4. Get Code: Copy and paste a snippet of code into your catalog template.

Click any of the tasks to jump to that page in the Syndetics Unbound Admin.

That's it!

Quick Start

In addition to this Get Started Guide, we also have a short Quick Start to walk you through the four above steps, available here:

http://proquest.syndetics.com/pdf/Syndetics_Unbound_QuickStart.pdf

Use the rest of this manual to walk through each step in-depth.

Account Info and Users

When your Syndetics Unbound account was created, we filled in as much information as possible. Click **Account Settings** and then **Account Info** to modify and add information such as your primary contact person, mailing address, and more.

Users

Each library account has one user login created by default.

You can create additional user logins for your library's account, if, for example, you have different staff that will be responsible for uploading holdings, or moderating patron reviews.

Navigate to **Account Settings** > **Account Users**. Click "Add User" to enter a new user. You'll be prompted to fill in a username, email, real name, and to choose a set of permissions.

Permission types include:

- Lead Administrator (can do anything)
- Administrator (can do anything except add, edit or remove user accounts)
- Uploader (can upload holdings, moderate content, and make Book Display Widgets)
- Moderator (can moderate content and make Book Display Widgets)
- Read-only (can view all settings, but not make any changes)

OPAC Settings

In the Syndetics Unbound Admin, navigate to **OPAC Settings**. Under **OPAC Basics** set your ILS vendor and system type and provide links to your homepage and catalog.

In order to link between items in your catalog, Syndetics Unbound requires an ISBN-based URL. Set this under **Links and URLs**. You can find a URL structure for your system type by clicking the blue Help icon on this page. Fill in as many as you can, to ensure we are able to link between items in your catalog. The ISBN URL is required, others are optional. Every URL type may not be available on your system.

As a general rule, use UNBOUNDREPLACE as a placeholder in the URL for the text being searched for.

For example, an ISBN URL might look like this:

```
https://yourcatalog.com/client/search/results?type=ISBN&term=UNBOUNDREPLACE
```

Advanced – CSS

Under **Advanced Options**, you'll see a section to enter Global CSS.

Syndetics Unbound is set to inherit as much styling as possible from the page it's on. If you'd like to further customize, you can do so here. Elements you may choose to modify include:

Main area and headings

`.unbound_mega` – The main "simple div" of Syndetics Unbound. By default it inherits the font size from the page, but occasionally needs to be set it to something specific because the page is setting it in a non-standard way (like for individual sections instead of the whole page). This is the place to do that.

`.unbound_mega_header` – Used for the "More about this title from Syndetics Unbound" text at the top of simple div.

`.unbound_header` – Used for all of the section names.

`.unbound_splitdiv .unbound_footer a, .unbound_mega .unbound_footer a` – The buttons at the bottom of each section. Change the colors, for instance.

Tags

`.unbound_tagblocktable td` – Tag block base color, font weight.

`.unbound_tagblocktable .level2 .level1` – Tag block secondary colors, font weight.

Mobile-ready

Syndetics Unbound has content-size breakpoint classes on the `.unbound_mega` element that change based on the width of the SU container. Here's a set of classes as example:

`.gt420 .gt480 .gt560 .gt693 .gt700 .lt768 .lt960 .lt1200`

So this .unbound_mega's container is "greater than 420px wide" and "less than 768 pixels wide." We occasionally will add new breakpoints but we won't get rid of previously defined breakpoints. If the screen is resized the classes will reflect this and `.gt700` will become `.lt700` if needed.

These can be used for content-aware sizing or styling, like making fonts smaller when there is less space available:

`.lt700.unbound_mega { font-size: 10px; }`

Uploading Holdings

Why

Syndetics Unbound needs to know your holdings so we can link to and recommend items we know you have in your catalog. There are a few options for uploading your holdings: Easy Holdings, API Holdings Retrieval, Upload via Web, and Upload via FTP.

Easy Holdings

Libraries that have subscribed to Syndetics cover images in the past can take advantage of our "easy holdings" solution. ProQuest keeps a 4-month record of the covers your library has needed; by extracting the ISBNs from this, we can build up a highly accurate list of your library's holdings, without any effort on your part. Contact our technical support team by emailing PQ-techsupport1@clarivate.com to see if your library is a candidate for this.

Note that if you choose to use Easy Holdings, the Browse Shelf enrichment will not appear, as it relies on call number information that is not available with Easy Holdings.

API Holdings Retrieval

Syndetics Unbound supports API Holdings Retrieval for some systems. This is an automated way to keep your library's holdings up-to-date in Syndetics Unbound, in place of FTP or web upload of holdings.

API Holdings Retrieval runs on a weekly basis, and fetches both additions and deletions. We strongly recommend seeding your holdings with an initial full file sent via web interface or FTP to begin, and then enabling API retrieval to manage updates.

Log into the Syndetics Unbound Admin and navigate to **Holdings > Upload via API**. Choose your API Type from the dropdown menu. Enter API access information, which may include: ID/Secret, Key, URL, Domain, and Staff login details. The fields here vary between systems, but all fields presented must be filled out.

For Sierra libraries, we suggest making a new API Key with the role of "Bibs Read" for this usage.

Format and Call Numbers

You can send your holdings either as full MARC or as a tab-delimited file (TSV).

We ask that you also include call numbers, which power the Browse Shelf enhancement. We can index bib-level or item-level call numbers.

Before your file is indexed, configure your Browse Shelf Settings. Navigate to **Holdings > Holdings Settings**. Set your call number type and the field in which they can be found in your MARC record. If you chose nothing, we will index bib level call numbers from your MARC records (082/092/050/090).

If you choose to send a MARC file, the most important fields to include are the leader, 008, 020, 100, and the 245, along with your call numbers (see above).

If you choose to send a tab-delimited file, format the file like this:

```
ISBN<tab>Title<tab>Author<tab>Location<tab>Call number<tab>Collection
```

If you're unable to export call number location, you may choose to send a tab-delimited file that only contains ISBN<tab>Title<tab>Author. If this is the case, though, the Browse Shelf enrichment will not appear, as it relies on call number information.

How to Upload

Log into the Syndetics Unbound Admin and navigate to **Holdings**. This is where you upload your library's holdings, either as a tab-delimited file or a raw MARC file.

You can either upload your holdings using our web interface, or via FTP. If you choose FTP, you'll have the ability to load and send holdings files to Syndetics Unbound using your FTP client, automatizing the process and making it even easier.

You can also enter an email address on **Holdings Settings** to receive notification when indexing is complete.

Upload Holdings via Web

To upload using the web interface, navigate to **Upload Holdings via Web**. Set the file type, action, character encoding, and call number type.

If you want to add new records, choose "Add additional items." This will not affect any current records. If you want to delete all your current records and upload new ones, choose "Replace all items."

Upload Holdings via FTP

If you would rather FTP your holdings file to us, you'll need to first set your FTP rules under **Upload Holdings via FTP** so we know what type of file to expect. Once you've configured these settings, you'll be given the server and login information necessary to upload your files via FTP.

You can also overwrite the "Action" you've previously set in your FTP settings by designating the action to be taken in your file name. Simply include one of these words anywhere in the file name to force that action: **update**, **reindex**, or **delete**.

Updating

We require a full export to begin. After that, most libraries send incremental update files to add new records on a regular basis, at whatever frequency works for them—weekly, monthly, etc. We also recommend sending a periodic "full replace" of your records to ensure we've also removed items that have been deaccessioned. For some libraries that's done quarterly, others monthly. See also "Updating Holdings" in **Maintaining Syndetics Unbound** later in this document.

Catalog Enrichment

Configuring Enrichments on Detail and Search Pages

In the Syndetics Unbound Admin, navigate to **Catalog Enrichments**.

Detail Page controls the enrichments that Syndetics Unbound will include on your bib detail pages. Here, you can:

- Toggle individual enrichments on and off.
- Reorder the display order (click "Change Order" and then drag and drop to rearrange).
- Customize header text.
- Turn all Syndetics Unbound enrichments off (toggle the master switch to "off").

A few enrichments have additional configuration options. Click the edit pencil by the enrichment to view these.

Search Page allows certain Syndetics Unbound enrichments to appear in an abbreviated form on search result pages. Here you can control each element's settings on the search page. You can choose to toggle different elements on/off or reorder the display order independently of your detail page settings.

The Search Page feature is not yet available for all systems. If you're interested in this feature and it is not enabled in your Syndetics Unbound Admin, please contact PQ-techsupport1@clarivate.com.

About Each Enrichment

Premium Cover Service

Syndetics Unbound offers the most comprehensive cover database in existence for libraries — over 50 million full-color cover images for books, videos, DVDs, and CDs, with thousands of new covers added every week. If a cover is missing for an item, Syndetics Unbound automatically generates a cover using the title, author, and media type.

Summary

Over 43 million summaries and annotations covering fiction, non-fiction, and both trade and scholarly titles. Thousands of summaries are added each week.

About the Author

This section includes the author biography and a shelf of other items by the author. The section is also adorned by a small author photo — a first in the catalog, although familiar elsewhere on the web.

Look Inside

Includes first chapters, book excerpts, and table of contents for millions of titles, enabling patrons to take a peek inside a book.

Series

Shows a book's series, including the reading order. If the library is missing part of the series, those covers are shown, but grayed out.

You May Also Like

Provides sharp, on-the-spot readers' advisory in your catalog, with the option to browse a larger world of suggestions, drawn from LibraryThing members and big-data algorithms. As with other enrichments, Syndetics Unbound only recommends items that

your library owns. You May Also Like suggests other books you may enjoy, as well as other series and other authors.

Professional Reviews

More than 6.4 million reviews are available from:

- Library Journal
- School Library Journal
- New York Times
- The Guardian
- The Horn Book
- BookList
- BookSeller + Publisher Magazine
- Choice
- Publishers Weekly
- Kirkus

A la carte professional review options also include:

- Voice of Youth Advocates: VOYA
- Doody's Medical Reviews
- Quill and Quire

Reader Reviews and Ratings

Includes more than 2.2 million vetted reader reviews from LibraryThing members. It also allows patrons and librarians to add their own ratings and reviews, right in their library's catalog.

Also Available As

Help patrons find other available formats and versions of a title in your collection, including paper, audio, ebook, and translations.

Tags

The Tags element updates LibraryThing's celebrated tag clouds — redesigning them toward simplicity and consistency. Based on over 185 million tags created by LibraryThing members, tags are hand-vetted by our staff librarians for quality. A new exploration interface allows patrons to combine and filter tags, to focus in on the genres, subjects, and other categories they want most.

Book Profile

A newly dynamic version of what Bowker has done for years — analyzing thousands of new works of fiction, short story collections, biographies, autobiographies, and memoirs annually. With Syndetics Unbound every term is clickable, and patrons can search and browse over one million profiles.

Reading Level

See and explore other books in the same age and grade range. Reading Level also includes Metametrics Lexile® Framework for Reading as well as Accelerated Reader.

Awards

Highlights the awards a title has won, and helps patrons find highly-awarded books in your collection. Includes well-known awards, like the National Book Award and the Booker Prize, but also smaller awards like the Bram Stoker Award and Oklahoma's Sequoyah Book Award.

Browse Shelf

Gives your patrons the context and serendipity of browsing a physical shelf, using your call numbers. Includes a mini shelf-browser that sits on your detail pages, and a full-screen version, launched from the detail page.

Video and Music

Syndetics Unbound offers a wealth of descriptive information for more than 4 million video and music titles including annotations, performers, track listings, release dates, genres, keywords, and themes.

Video Games

The video game element enriches your catalog with game covers, ESRB Rating, Star Rating, Game Information, System Requirements, Game Features, Game Description, Game Reviews, and Screenshots.

Altmetric Badges

Altmetric badges show how often journal articles and other scholarly outputs like datasets are discussed and used around the world. Every badge links through to an automatically generated Altmetric details page, which provides a collated record of all of the original mentions of the book (and individual chapters where possible).

Core Titles (available with a subscription to RCL)

Resources for College Libraries Core Titles highlights trustworthy academic books that curated by Choice/ACRL subject specialists. The RCL enrichment element provides a way to explore the RCL titles that are available within a library collection.

Putting Syndetics Unbound in Your Catalog

To enable Syndetics Unbound in your OPAC or discovery layer, you'll need to add a piece of HTML code into your bibliographic template page.

Click "**Get Code**" under **Catalog Enrichments** in the Syndetics Unbound Admin. This page provides the code you'll need to paste into your OPAC's template page.

Click the "Help" icon (at the top, right) for system specific instructions on where to include this code. Typically you'll be finding your OPAC's bibliographic template page, and pasting this code near the end of that file. Some systems, like SirsiDynix Enterprise, will provide a file to download from the Syndetics Unbound Admin and upload to the ILS. Again, click the "Help" icon for system specific instructions.

To enable Syndetics Unbound on your Search Results pages (where available, see page 12), you'll need to include this same piece of HTML code on your OPAC's search results pages.

Existing Customers

If you're already subscribed to either Syndetics or LibraryThing, it may be even easier. Please see **Upgrading from Syndetics or LibraryThing for Libraries** in this manual.

Advanced – Simple Div and Split Divs

Syndetics Unbound content typically is delivered in one section (the "**Simple Div**"). The "**Split Div**" feature allows you to place each enrichment element wherever you'd like, giving you the ultimate flexibility to tailor Syndetics Unbound to your system. This section details the various advanced placement options.

1. Default

Syndetics Unbound content appears by default in one section–the Simple Div–with all the available enrichment elements displaying together. The default placement is determined in advance for each system, and placed where we think is optimal. You don't have to do anything other than add the Javascript code (from the **Get Code** page in the Syndetics Unbound Admin) with your unique Syndetics Unbound account ID code in it.

2. Place the Simple Div on the page yourself

If you'd like to override the default auto-placement, use this div where you would like the Syndetics Unbound Simple Div to appear on your catalog detail page.

```
<div id="syndetics_unbound"></div>
```

3. Use Both the Simple Div and Split Divs

Pull one or two enrichment elements out of the Simple Div and place them on your catalog page in different places (up higher, on the sidebar, etc.) and then include the rest of the Syndetics Unbound content still in the default Simple Div. Do this by using the individual Split Div classes as listed below to place each element on your catalog page where you'd like them to appear. Any enrichments you do not call directly with the specific div will then appear in the Simple Div.

4. Use no Simple Div, Only Split Divs

If you'd like to not use the Simple Div at all, and only use the individual enrichments, go to **OPAC Settings** > **Advanced Options** in the Syndetics Unbound Admin, and toggle

"Use Simple Div" to "No." Then use the individual Split Div classes as listed below to place each enrichment element on your catalog page where you'd like them to appear.

Notes

- If you have toggled any enrichments off under **Catalog Enrichments** > **Detail Page Settings** in the Syndetics Unbound Admin, that setting will override anything you place on the page.
- The Syndetics Unbound Javascript with your unique ID (as found in the Syndetics Unbound Admin under **Get Code**) must also be included on the page with these divs.
- To include a header for a split div, use the same div class name as the enrichment itself, but with `_header` appended. It will only populate if the enrichment itself is shown on the page. For example, the following would show the header Series, followed by the series element:

```
<div class="unbound_series_header"></div>
<div class="unbound_series"></div>
```

Header text can be altered under **Catalog Enrichments > Customize Translate/Text** in the Syndetics Unbound Admin.

List of Enrichments and Their Split Div Classes

Summary	`<div class="unbound_summary"></div>`
Summary for Video & Music	`<div class="unbound_audiovideo"></div>`
Summary for Video Games	`<div class="unbound_game"></div>`
About The Author	`<div class="unbound_author"></div>`
Look Inside	`<div class="unbound_lookinside"></div>`
Series	`<div class="unbound_series"></div>`

You May Also Like	`<div class="unbound_similar"></div>`
Professional Reviews	`<div class="unbound_reviews"></div>`
Reader Reviews	`<div class="unbound_patronreviews"></div>`
Also Available As	`<div class="unbound_other"></div>`
Tags	`<div class="unbound_tags"></div>`
Book Profile	`<div class="unbound_bookprofile"></div>`
Reading Level	`<div class="unbound_readinglevel"></div>`
Awards	`<div class="unbound_awards"></div>`
Browse Shelf	`<div class="unbound_shelfbrowse"></div>`
Librarian Recommends: Lists	`<div class="unbound_lists"></div>`
RCL Core Titles (additional subscription required)	`<div class="unbound_rcl"></div>`
Altmetric Badges	`<div class="unbound_altmetrics"></div>`
Main Cover (to force placement of the cover image element on a detail page)	`<div class="unbound_maincover"></div>`

Enable Cover Images in Your Catalog

Navigate to **Catalog Enrichments** > **Covers** in the Syndetics Unbound Admin. This page provides the information you'll need to include into the admin of your ILS, including your unique Client Code.

URL Parameters

ISBN: The ISBN from the MARC record (or similar)

Client Code: Your Syndetics client code

Filename: The size of image

- Small Cover: sc.gif
- Medium Cover: mc.gif
- Large Cover: lc.gif

Syntax:

```
https://secure.syndetics.com/index.aspx?isbn=(ISBN)/(Filename)&client=(Client
Code)&type=unbound&upc=(UPC)&oclc=(OCLC)
```

Example:

```
https://secure.syndetics.com/index.aspx?isbn=0385508042/mc.gif&client=client_
code&type=unbound
```

Video and Music URL String Format to Include UPC and OCLC

Syntax:

```
https://secure.syndetics.com/index.aspx?isbn=(ISBN_number)/(filename)&client=
(client_code)&type=(display_code)&upc=(UPC_code)&oclc=(OCLC_number)
```

Example:

```
https://secure.syndetics.com/index.aspx?isbn=/mc.gif&client=client_code&type=
unbound&upc=733961100525&oclc=32744417
```

Using the EAN replaces the ISBN in the URL

Example:

```
https://secure.syndetics.com/index.aspx?isbn=(EAN)/mc.gif&client=client_code&
type=unbound
```

The URL string can contain any combination of **ISBN/EAN/ISSN, UPC,** or **OCLC** number. Any of the three parameters can be left blank if no values are available in the MARC record.

Automatically Generated Covers

If a cover is missing for an item, Syndetics Unbound automatically generates a cover using the title, author, and media type.

You have the option of passing in the format of the record to display on these blank cover images. The following format strings are allowed:

- Paper Book
- CD-ROM
- Ebook
- Audiobook
- Audio
- Video
- Journal

Sample URL to pass in the format:

```
https://secure.syndetics.com/index.aspx?isbn=0385508042/mc.gif&client=client_
code&type=unbound&nicaption=%1F%1FPaper Book
```

For Innovative libraries ONLY

Innovative libraries with **PathFinder Pro** subscribing to content for music and video should enable ENH_IMAGE and add these two additional strings at the end of the URL:
```
&upc=#@UPC#&oclc=#@OCLC#
```

Sample URL:

ENH_IMAGE=http://www.syndetics.com/index.aspx?isbn=%s/SC.GIF&client=clientcode&showCaptionBelow=t&upc=#@UPC#&oclc=#@OCLC#|I|http://www.syndetics.com/index.aspx?isbn=%s/index.html&client=clientcode&type=rn12&upc=#@UPC#&oclc=#@OCLC#

Innovative libraries may also choose to use the Main cover div (see list of Split Div classes in section above) to place the cover image element on a detail page.

```
<div class="unbound_maincover"></div>
```

Librarian Recommends

Library Recommends is a new tool in Syndetics Unbound that allows libraries to add, recommend, and curate content within their catalog.

Librarian Recommends includes both **Lists** and **Cover Upload**.

Create Librarian Recommends Accounts

Librarian Recommends has a secondary account system, to allow multiple staff at your institution to create lists or upload cover images under their own logins.

You can invite members of your staff to create accounts in the Syndetics Unbound Admin, under **Lists > Lists Home > Invite Librarians to Make Lists**. There are two methods to invite staff to make accounts–one by one, or en masse.

Send email allows you to enter an email address to send an individual invite code.

Share invitation code provides you with a message that includes an invite code and a URL, which you can copy/paste and share with your staff. You might include this in an email or bulletin to all library staff.

Librarian Recommends: Lists

Library Recommends: Lists is a feature that allows librarians to curate their own lists that display within the catalog, showcasing topics, genres, staff picks, and whatever else you can dream up. Library Recommends: Lists display on bib detail pages in the catalog, with the other Syndetics Unbound elements.

Lists includes lists made by librarians on the Syndetics Unbound team (noted as "by Unbound Librarians), as well as by other librarians using Syndetics Unbound (noted with their library's name).

You can also use our Lists Widget to showcase the lists you've made on your homepage, or elsewhere on your library website.

Configuration in the Syndetics Unbound Admin

Turn Lists on/off. To turn the display of the Lists enrichment on or off in your catalog, navigate to **Catalog Enrichments > Detail Page** in the Syndetics Unbound Admin.

Under **Lists > Lists Settings**, you can decide whether you'd like your librarians to have the ability to create lists. If you choose "No" here, you can still display the Lists element in your catalog, populated with lists from other libraries and Syndetics Unbound staff. You can also decide if you'd like the lists your librarians create to be shared with other Syndetics Unbound libraries. Note that at any time, an individual list can be marked unsharable, despite this setting.

Show which lists. Under **Lists > Lists Display Settings**, you can determine which lists from outside your library are shown in your catalog–those from other libraries using Syndetics Unbound, as well as lists made by the Syndetics Unbound staff. Syndetics Unbound staff lists include both automated "new and trending" by genre as well as hand-curated by our team of librarians. Lists are also classified by library type, so you can choose to limit the lists shown by to those intended for and from Public, Academic, or School Libraries.

Librarian Recommends Admin

Log in

Navigate to the Librarian Recommends login. You can find this in a few ways:

- In the Syndetics Unbound Admin, under **Lists > Lists Home > Create Lists**
- Click the blue Syndetics Unbound icon at the bottom of the Syndetics Unbound enrichments in your catalog. It looks like this:

 Catalog enrichment powered by Syndetics Unbound

You can log in with your Syndetics Unbound Admin credentials, or a new account created just for Lists creation (see Create Librarian Recommends Accounts, above).

Account Settings

Personas let you create different identities within your library. Each account, by default, has a single persona attached to it, the library itself. You might use personas if you want to post as the Teen Librarian, or the Local History Room.

Create and Publish Lists

Click **Create List**. First, choose a list type (General Recommendations, Staff Picks, Genre or Topic Guides). These categories are used for sorting when patrons view All Lists. Name your list, provide a description if you'd like, and choose a sort order.

Choose a persona to post as. Each account, by default, has a single persona attached to it, the library itself. You can create additional personas in the Librarian Recommends Admin, under Account Settings.

Under **Advanced Options** you can choose "Do not share with other libraries" which allows you to keep a given list within only your library. If you choose nothing here, the sharing settings are taken from the overall List Settings in the Syndetics Unbound Admin.

Click **Create New List**.

Now, you'll add books to your list. Click "**+ Add to List**", and then search for the title you'd like to include. You can add both items in your catalog as well as websites. This can be useful if you'd like to include an outside resource in your list. You need to include at least 4 items in your list to be able to publish it.

Add a Comment lets you annotate any item on your list.

Reorder lets you drag and drop to change the order of the items on your list.

Publish to make your list live in your catalog. You can leave lists in draft form as unpublished and find them again to edit under Manage Lists > Your Library.

Manage Lists

Under Manage Lists, you can see all the lists created by both your library, and by other libraries.

Hide Lists. If you'd like to exclude a list from appearing in your catalog, you can hide it. Navigate to Manage Lists > Other Libraries. You'll see a Show in Your Library column, with buttons to Hide.

Display Lists on Your Library Homepage

List Widgets

You can showcase the lists you've created outside of the catalog as well! In the Syndetics Unbound Admin, navigate to **Display Widgets > List Widgets.**

Click "Create new list widget." There are then five steps to making your widget:

1. **Select which Lists to show.** You can choose from any of the Lists categories, or choose "custom" to select specific Lists.

2. **Style.** In style, you can name your List Widget, and choose how many rows to display.
3. **Preview.** Preview provides an idea of what data you've pulled back, and how it will look.
4. **Save.** You'll have to name your widget, then click "Save Settings."
5. **Embed**
    a. After you make and save a widget, you'll see two text boxes populate in the Embed section with code for you to embed the widget on your website or blog: HTML and JavaScript.
    b. The **HTML box** is a <div> containing the widget. Place this where the widget should display on the page.
    c. The **JavaScript box** contains our snippet of JavaScript code that lets us send data to your website or blog.

Lists in Book Display Widgets

The Lists you've created can also be used as Data Sources in Book Display Widgets (see page 30 for more on Book Display Widgets). Simply select "Lists" as the Data Source choice, and then choose which list you'd like.

Librarian Recommends: Cover Upload

Use Cover Upload to upload images to the Syndetics Unbound image repository. Utilizing an easy drag and drop upload tool, Syndetics Unbound helps to streamline the process for updating images in your catalog, enhancing discoverability.

You can use Cover Upload to either add an image where one is missing or to replace an incorrect or low-quality image.

Upload Cover Images

Navigate to the Librarian Recommends login. You can find this by clicking on the blue Syndetics Unbound icon at the bottom of the Syndetics Unbound enrichments in your catalog. It looks like this:

 Catalog enrichment powered by Syndetics Unbound

Log in with your Syndetics Unbound Admin credentials, or with a Librarian Recommends Account (also used for Librarian Recommends: Lists).

Click **Cover Upload**. If available, this screen will show you the ISBN, title, author, and original cover image (if it exists) that you'll be uploading a cover for. If the original cover appears, your cover image will replace this image.

If the wrong information is appearing, or if you wish to upload an image for a different item, click "Clear Form."

Enter the identifier and type (we currently accept ISBN, UPC, and ISSN).

Click in the yellow box to choose an image from your computer, or simply drag and drop the image file into the box. Cover upload accepts files up to 10MB, in the following file types: .png, .jpg, .jpeg, and .gif.

Cover Upload History

Under Cover Upload History, you can see all of the covers you've submitted, and sort by status (waiting for review, approved, rejected, cancelled).

Uploaded images will be reviewed by Syndetics Unbound Librarians before being included in the image repository. If you would like to cancel a submission, you can only do so before it's reviewed. You will see a "Cancel Submission button" in this case.

Book Display Widgets

Book Display Widgets supplement the catalog enrichment of Syndetics Unbound. These widgets allow you to create virtual book displays, with covers linking to that item's record in your catalog, driving traffic and discoverability. Create as many widgets as you would like, and configure each individually. Widgets can be placed on any website, and shared on social media.

Creating and Modifying Widgets

The widget creation process is separated into six different sections: Select Items, Results, Style, Preview, Save, and Embed.

Select Items is where you choose which items go into your widget, and **Results** is where you refine and annotate those items. In **Style**, you select a display type and can modify from the default settings. You can mix and match data sources and display types. **Preview** is where you can see what your widget will look like, and **Save** is where you name and save a widget. The **Embed** section gives you the code required for embedding a dynamic live widget on your website, or a static image to use on social media.

Select Items

Choose which type of data source you would like to use. Examples of data sources are a webpage, a list of ISBNs, a genre, or an award. More information about each data source is located by clicking the "Help" icon on the widget creation page.

Results

Shows at-a-glance information about items in the widget. Also shows any items excluded for lack of cover, and number of annotated items. To check over individual results or write annotations, click on the "See Details" button.

Style

Choose what you want your widget to look like. The four options are: 3-D carousel, dynamic grid, carousel, and scrolling. Every display type can customized or you can stick to the default settings. More options are available under the "Advanced Options" button.

Preview

We show what your widget will look like when embedded on a webpage. Don't like how something looks on your widget? Change it in the Style section above and see your widget change in this section.

Save

Remember to save your widget! You can always modify existing widgets by opening them from your list of widgets.

Embed: Adding Widgets to your Webpage

After you make and save a widget, you'll see two text boxes populate in the **Embed** section with code for you to embed the widget on your website or blog: HTML and JavaScript.

The **HTML box** is a `<div>` containing the widget. Place this where the widget should actually go on the page. In many cases, this will be a section that accepts outside code in your CMS. This must go where you want the widget to be on the page.

The **JavaScript box** contains our snippet of JavaScript code that lets us send data to your website or blog. You can place this anywhere on the webpage, but most libraries put it next to the HTML code so it's all in the same place.

The **Share Images** section contains three ways for you to use a static snapshot of a widget for places where widgets aren't allowed, like social media posts and email newsletters. Choose your social media platform and either link to or download a

snapshot of the widget formatted for that platform. Add a picture to the HTML of your emails easily with the code generated in the Newsletter section.

Multi-Widgets and Facebook Integration

You can create multi-widgets that allow for multiple widgets to be in the same place, switchable in either tabs or a dropdown menu. Make a multi-widget by first creating the individual widgets you want in the multi widget. Then go to the multi-widget section, create a new multi-widget, and select the widgets you want in it. You can then name the multi-widget, choose a theme, and add your own custom CSS. Adding a multi-widget to your web page or blog is done the same way as adding a regular widget.

Add widgets to a Page Tab in Facebook by first making all the widgets you want to put onto Facebook. Next, navigate to the **Facebook Widgets** section. Configure the widgets you want on Facebook and then connect while logged into a Facebook account that has administrator privileges for your library's Facebook page. Configuring your Facebook widgets consists of selecting widgets to add to the Facebook tab and ordering them via drag and drop, then customizing the appearance of your Facebook Page Tab with CSS. The main classes and ids have been provided.

Advanced Options

Book Display Widgets have a set of default styles that are engineered to look great out of the box on most websites. However, if you would like to customize each widget, click on "Advanced Options" in the **Style** section to change additional aspects of the widget's appearance.

You have the option to use outside custom content in your widgets: integrating with other cover services and directing a particular widget to a different catalog or search type than the general one for the account.

Custom Covers

Book Display Widgets use covers from Syndetics, but you can augment this cover service with your own. To incorporate your library's cover images, copy the URL of any cover in your service and replace the ISBN with `UNBOUNDREPLACE`, e.g. `http://www.coverservicehere.com/isbn/UNBOUNDREPLACE`. Then place this URL into the Custom Cover URL field in "Advanced Options" under **Style**.

Custom URL for the widget

In most cases, widgets will use the account-wide ISBN URL to link into the catalog. However, in some particular cases, you might want to link to a different catalog or use a different search parameter. (For example, linking specifically to a classic catalog, or using a search for UPCs or ISSNs.) To do this, simply create another ISBN (or ISSN or UPC) search URL for your catalog as you did for the whole account upon setup and put that into the "Use a custom URL for this widget" box located in "Advanced Options" under **Style**.

Get This Widget

We've curated a selection of Book Display Widgets on the Syndetics Unbound LibGuide, that can easily be copied into your own account for use. Just click "Get This Widget" to clone a widget into your own Syndetics Unbound Account. See the selection here:

https://proquest.libguides.com/syndetics/bdw

Maintaining Syndetics Unbound

Update holdings

Syndetics Unbound relies on knowing your holdings so it can link between items, and only suggest items held in your catalog. Keeping that data as up to date as possible is important.

To update your holdings, navigate to **Holdings > Upload Holdings** in the Syndetics Unbound Admin.

At present you can update your data in three ways:

- **Replace all records** to upload a whole new file. This will add new titles and remove books you have discarded.
- **Add additional records** to upload incremental additions. This option will go faster, but it will leave in your account old books that don't exist in your system any longer.
- **Delete records** to remove just these records from your indexed holdings.

If you have chosen to FTP your holdings, you can overwrite the "Action" you've previously set in your FTP settings by designating the action to be taken in your file name. Simply include either the word "update" "replace" or "delete" anywhere in the file name to force that action.

Moderate patron reviews

When patrons write reviews, they must be moderated before they appear publicly in your catalog. Reviews coming from LibraryThing members and other libraries are already vetted.

In the Syndetics Unbound Admin, navigate to **Content Moderation**. Click "Unmoderated" to see all reviews that need to be checked over. Click "Approve" or

"Reject." If you reject a review, it will still appear to the patron who wrote it, but not to anyone else using your catalog.

To receive an email when there are reviews awaiting moderation in your account, navigate to the appropriate User (**Account Settings > Account Users > Edit**) and click "Receive daily review moderation emails."

Statistics

The Statistics Dashboard presents coverage and usage statistics for Syndetics Unbound in your catalog. Click the **Statistics** button on your Syndetics Unbound Admin home page to access the dashboard.

Instance Level Statistics. If your Syndetics Unbound account has more than one instance, you'll see the option to view instance level stats, or on a global account level.

Export. This exports all stats into a spreadsheet. Any instance level stats will be split into separate sheets. It also takes into account the time period selected and will breakdown into either a monthly or daily level.

- All time—export reports on level of month
- Year to date—export reports on level of month
- Last month—export reports on level of day
- Last 6 months—export reports on level of day

Blue Boxes

Pages Enriched. This shows how often enrichments are displaying as a percentage of all catalog pages loaded.

Covers Loaded. This shows the number of cover images loaded.

Most Seen. The enrichment most loaded.

Most Used. The enrichment with the most patron interactions.

Coverage

Pages with Identifiers

This shows the number of times Syndetics Unbound showed any enrichment on a catalog page, and as a percentage of all catalog pages loaded. This chart only looks at pages with identifiers (ISBN, UPC, ISSN, EAN).

Pages with No Identifiers

This counts the number of times Syndetics Unbound showed any enrichment on a catalog page without an ISBN or other identifier (typically this means the match was made on title/author data instead).

Enrichment Coverage

This shows how often enrichments are displaying as a percentage of all pages. If Summary is 90%, that means that 90% of the time that an item page is loaded, it will include a summary.

Syndetics Cover Images

This counts the number of cover images shown. Syndetics image counts include both detail and search pages.

Search Page Loads

For systems that support Syndetics Unbound integration on the catalog search pages, this shows a count of loads.

Interactions

All Interactions

Interactions include: hovering on covers to read summaries, clicking "read more" to expand text, opening lightboxes, clicking within lightboxes, and clicking on "Check Availability" to navigate to a new bib page.

How Patrons Interact

Enrichments with Most Interactions. This chart shows the top enrichments that have been interacted with.

Kinds of Interactions

- **Summary Rollover** is the hovering on a cover image to read summary information.
- **Clicks** include all types of click interactions: clicking "read more" to expand text, opening lightboxes, clicking within lightboxes (browsing, filtering, etc.), and clicking on "Check Availability" to navigate to a new bib page.

Display Widgets

Views shows the number of times your Book Display Widgets have loaded and been viewed.

Interactions include both click throughs and summary rollovers.

Other Topics

Instances

Instances let you create and save a set of settings. Every account gets one "Primary instance." Most libraries will never need another.

Why use more instances?

- **Testing**. Create a test instance to try out new settings or styling without affecting your live catalog.
- **Multiple catalogs**. If you have several catalogs, such as a classic catalog and a discovery layer, instances can allow them to have different styling and link URLs.
- **Consortia**. Consortia may choose to have separate instances for each member library, to allow different settings and per-library statistics.

How instances work

If you have only one instance, you will only see reference to it under **OPAC Settings > Instances**.

If you have multiple instances, each settings page shows you which instance you're editing at the top, and allows you to change it.

One instance is always marked primary. This is the instance that will be used on your catalog, unless you use the instance-specific JavaScript.

Instances can be based on other instances. This allows them to inherit settings from another instance.

Translation and local language settings

Interface language

Set your interface language on **OPAC Settings > Advanced Options**. This will translate the interface text of Syndetics Unbound into your selected language. It will not translate the content (for example, the text of Summary, Professional Reviews, etc.).

If patrons can select their language on your catalog, their choice will override this setting. This option is currently available for Primo, Summon, Ebook Central, Enterprise, and Polaris systems.

Customize/Translate Text

To customize any of the translation strings, or to change the text (renaming the header "Tags" to "Browse by Tag," for example), navigate to **Catalog Enrichments > Customize/Translate Text**. Choose the language set you wish to modify from the dropdown, and then add your edits.

Other language settings

Tags translation. On **Catalog Enrichments > Detail Page > Tags**. If you enable tag translation, this will translate many tags into the language of your catalog interface.

Edition-language. On **OPAC Settings > Advanced Options**. When multiple editions of a work are available at your library, we will display the most popular edition. To preference certain languages—for example, to pick a less popular German edition over a more popular English one—chose them from the drop down menus in the order you'd prefer.

Consortia Indexing of Holdings

What is consortia indexing of holdings?

Many consortia use Syndetics Unbound in their shared catalog, sharing one set of holdings data. This means that when looking at "You May Also Like" recommendations (or series, or any enrichment element that suggests other books) you will see titles held by libraries across the entire consortial group.

If your consortia would prefer each library in the group to limit the data shown in Syndetics Unbound to only their institution, then you'll need to use consortial indexing of holdings.

This setting must be applied to the entire group, as it's done on the indexing level when the account is created, and determines whether the holdings are indexed into one big "bucket" of consortial holdings or many smaller "buckets".

How to get set up

1. Let us know!

We'll need to do some special processing for your account. Email Tech Support at PQ-techsupport1@clarivate.com to get started.

2. Consortium Map

You must supply a Consortium Map, containing the following data points:

- **Library Name**
- **MARC Holdings Code**: The code that libraries have in their holdings file, representing individual consortium libraries. It can but does not always differ from the Catalog Code.
- **Catalog Code**: The code that the OPAC or discovery layer has on the page or in the URL, representing individual consortium libraries. (Note: this is the "profile code" in SirsiDynix Enterprise.)

It might look something like this:

MARC Holdings Code	Library Name	Catalog Code
alp	Alpha Public Library	AlphaPL
bpl	Beta Public Library	BetaPL

The Consortium Map may be submitted via email, in spreadsheet form.

3. Holdings

The holdings you upload must contain MARC Holdings Codes, indicating which library in the group holds each item.

- To submit holdings in MARC format, first indicate which field and subfield contain the location codes in the Syndetics Unbound Admin under **Holdings > Holdings Settings**.
- To submit holdings in TSV form, include holdings (with codes comma separated) in the space for location. For example:

9781416947455 1416947450   Shooting star   McKissack, Fredrick, Jr.   dw,rc,alp   Y Fic

4. Viewing your holdings counts

Once set up and indexing are complete, you'll be able to view the number of items indexed under each library in your Syndetics Unbound Admin under **Holdings > Consortia Support**.

Upgrading from Syndetics or LibraryThing for Libraries

If you're already subscribed to Syndetic Solutions or LibraryThing for Libraries, upgrading to Syndetics Unbound is very easy. We've highlighted a few steps in the process below, and how they might differ for existing customers. Please reach out to our technical support team by emailing PQ-techsupport1@clarivate.com if anything is unclear.

For Existing LibraryThing for Libraries Customers

Updating Code in Your Catalog

You don't have to change anything! We can run Syndetics Unbound off of the LibraryThing JavaScript you've already included in your OPAC.

Upload Your Holdings

We already have some holdings for your library, but it would make sense to update so Syndetics Unbound has access to the most current items you've acquired.

OPAC settings

Please check in **OPAC Basics** to make sure that your ISBN and other URLs are set.

For Existing Syndetics Plus customers

Updating Code in Your Catalog

You don't have to change anything! We can run Syndetics Unbound off of the Syndetics JavaScript you've already included in your OPAC.

Upload Your Holdings

Syndetics Unbound relies on knowing your holdings so it can link between items, and only suggest items held in your catalog. Please follow the instructions under Uploading Holdings.

OPAC settings

Please check in **OPAC Basics** to make sure that your ISBN and other URLs are set.

For Existing Syndetics Classic Customers

Add Code to your Catalog

You will need to add a piece of JavaScript code into your bibliographic template page. Please follow the instructions under Putting Syndetics Unbound in Your OPAC.

Upload Your Holdings

Syndetics Unbound relies on knowing your holdings so it can link between items, and only suggest items held in your catalog. Please follow the instructions under **Uploading Holdings**.

OPAC settings

Please check in **OPAC Basics** to make sure that your ISBN and other URLs are set.

APIs

Syndetics Unbound has a few API methods available.

To tell which enrichments are shown:

```
// return list of Unbound enrichments shown on the page
LibraryThingConnector.enrichmentsShown();

// did a particular enrichment show?
LibraryThingConnector.isEnrichmentShown('similar');
```

Enrichment specific callback methods you can use to detect when showing or not (with the enrichment name between `unbound_` and `_success` or `_failure`):

```
unbound_similar_success = function()  {
      console.info('similar success callback');
}

 unbound_rcl_failure = function() {
      console.info('rcl failure callback');
}
```

To get number of enrichments shown:

```
LibraryThingConnector.numberOfEnhancementsShown()
```

You can also define a top level function called `unboundLoaded`.

```
unboundLoaded = function() {
   var numEnrichments = LibraryThingConnector.numberOfEnhancementsShown();
      if( numEnrichments == 0 ) {
      // no Unbound content, do something
      }
}
```