

Getting Started with Libby – Demonstration Checklist Outline

This checklist provides a detailed, end-to-end overview of how to use the Libby app and our suggested order of delivery. Feel free to adapt this document and create your own outline for the training you deliver.

1. Prepare your device.

- a. Use an Android, iOS, or Windows (10+) device to demo the Libby app.
- b. Install the app on your device – or – select the Libby menu, then **Set Up Libby** to **Reset Application**.
- c. *Note: You can also demo Libby from your web browser at libbyapp.com.*

2. Find your library.

- a. Open Libby on the device.
- b. Answer Libby's interview questions to customize the app to meet your needs.
 - i. Do you have a library card? **Yes**
 - ii. Tap **I'll Search For A Library** to find the library branch without using location services.
 - iii. Type the library name, then tap the digital collection once it appears.
 - iv. Tap **Enter Library Account Details** and enter the library login information.
 - v. Tap **Next** to visit the digital collection.*Note: The library card is automatically saved, and you won't have to go through the interview process again unless you're setting up another device.*

3. Highlight Libby's ease of use.

- a. **Search For a Book** by title, author, or subject by tapping the magnifying glass at the top of the screen.
Tip: Tap More Options to do an advanced search for Read-Along Books.
- b. Find an available book, audiobook, or magazine, tap **Borrow** from the search results screen, then tap **Borrow** again to confirm checkout.
- c. Select whether to read books with Libby or a Kindle ereader or reading app.
- d. *Optional: Tap the **Remember for all books** button, then select Kindle or Libby to only be prompted once. If not, you'll see this screen every time you borrow a title. Please note that if you choose Kindle, you'll be taken to Amazon to complete the borrowing process and the title will be delivered to a Kindle ereader or the reading app.*
- e. Tap the center of the screen to hide the reader menu, then tap the right side of the screen to page forward in the book or press the play button to start audio.
- f. Tap the center again to display the reader menu, then tap **Shelf** to view **Loans**.
- g. Tap the **Title Circle** at the bottom of the screen to return to the previously opened book.
- h. Tap **Library** to revisit the library collection.
 - i. Tap the **Library** button repeatedly to return to the Home screen.

4. Highlight the different ways to find books.

- a. *Note: The Quick and/or Advanced Search have already been reviewed.*
- b. Tap the Libby menu to show how users can add another library card.
- c. Scroll down to browse collections on the Library screen.
 - i. Tap the **Library** button to return to the top of the screen.
- d. Tap the **Explore** button just beneath the library's logo.

5. Use guides to explore the collection.

- a. *Note: Users can use guides, subjects, recent searches, and more to explore the collection.*
- b. Tap an audience (e.g., Kids) or language-based (e.g., Spanish) guide.
- c. Tap **Apply Filter Everywhere** to filter Libby everywhere based on the audience or language selected.

- d. Tap **Preferences** to review additional browsing preferences.
 - i. **Format** - Books or audiobooks
 - ii. **Language** – filter books by language written or spoken.
 - iii. **Audience** – filter to Juvenile, Young Adult, General Content, or Mature Content.
 - iv. **Compatibility** – opt for Kindle (*U.S. libraries only*) or Adobe-compatible books only.
 - v. **Availability** – show all titles or Available Titles only.
 - vi. **Sort By** – sort by Popularity, Date Added, Release Date, and more.
- e. Select **Everything** and change the availability preference to **Available Titles** (*this can be overridden later*).
- f. Tap **Apply Preferences**.
- g. Scroll down to browse collections and note updates based on the **Available Titles** preference.
- h. Note the title covers; audiobooks will display with headphones.
- i. Tap the ellipsis (...) to show how books can be borrowed, sampled, or tagged from guides.

6. Borrow an ebook.

- a. Select an ebook to review the title details page.
 - i. Tap **Tag** to add a tag. (*Explain that tags organize books you want to read, loved, and/or disliked.*)
 - 1. Tap **Add...** to create a custom tag with an emoji or up to 12 characters.
 - ii. Review the description and any available series information.
 - iii. Review title information, average user rating, subjects, and additional search results.
- b. Borrow the title.
 - i. Tap **Borrow** from the title details page.
 - ii. *Optional: Tap the underlined lending period, located above the title, to change.*
 - iii. Note the account limits for loans and holds on the library card.
 - iv. Tap **Borrow** again to confirm.
 - v. Allow the title to download, then **Open Book**.
*Note: Tap **Keep Browsing** or **Go to Shelf** for one those options instead.*
- c. Review key reading features.
 - i. Tap the center of the screen to hide the reader menu and tap the right side of the screen to page forward in the book.
 - ii. Tap the center of the screen, then tap the reader menu in the top right corner to adjust **Reading Settings**. Make the text larger or change the font style.
 - iii. Tap **Done** to return to the text.
 - iv. Press and drag a finger across text. Select **Highlight**, then **Note** to add a note.
 - v. Swipe to another page and add a **Bookmark** by tapping the top right corner.
 - vi. Tap the center of the screen to show the reader menu. Tap the reader menu to find **Bookmarks** (*highlights, notes, and bookmarks*).
 - vii. Tap **Done** to return to the text again and view the progress bar.
 - 1. Tap on the page number label to see book progress as a percentage or the pages left in the chapter.
 - 2. *Note: You may need to click the bottom of Libby to resume counting pages.*

7. Manage Loans.

- a. Tap **Shelf** to review the **Shelf summary** page. See what you're **Reading now**, **Where you left off**, and more.
- b. Tap **Loans** to see all your currently borrowed titles.
- c. Tap the downloaded book checkmark to stream the book or send to a device.
 - i. *Note: This will wipe the download. Press the cloud icon to download again.*
- d. Tap the **Library gem** to view loan options. *Note: The Library gem is the colored square next to the title's due date.*
 - i. **Return Early**

- ii. **Renew Loan** – available 72 hours before the loan expires
 - iii. **View Book Details in Library**
- e. Tap **Back To Shelf** > **library gem** > **Return Early** > **Return!** to highlight how to return titles early.
- f. Tap **Go To Shelf**.
- g. Tap **Actions** next to **Your loans** to view additional options for managing loans.
- h. Tap **Choose Download Behavior**. Review, then **Hide**.
Note: By default, books download automatically on Wi-Fi. Stream books to save space.
- i. Tap **Actions**, then **Reset Reading choices**.
 - i. Review how to reset your reading choice, then tap outside the box to take no action.

8. Place a Hold.

- a. Tap **Library** to revisit the library collection.
 - i. *Note: You may need to tap the **Library** button repeatedly to return to the Home page.*
- b. Tap the magnifying glass to perform a quick search for a popular subject category (such as historical fiction, memoir, or mystery).
- c. When results are returned, show how to filter and sort.
 - i. Filter by selecting one of the underlined text options at the top (format or subject).
 - ii. Tap **Refine** to override preferences. Change Availability to **Everything** and Sort By **Popularity**.
- d. Find a title that has a wait list.
- e. Tap on the small calendar icon to view wait list information.
- f. Tap **Place Hold**, enter your **email address** for hold notice, then tap **Place Hold!**

9. Manage Holds.

- a. Tap **Keep Browsing** to return to the library and note the *On your Holds shelf* text that displays.
- b. Tap **Shelf**. *Note: You may need to tap Shelf again to return to the summary page*, then tap **Holds**.
- c. Tap **Manage Hold** on a title and review and/or demonstrate the options to edit a single hold: **Cancel hold**, **Suspend hold**, or **View Book Details in Library**. Tap again to close.
- d. Tap **Actions** to review or demonstrate how to edit all holds: **Manage Hold Notices** or **Suspend All Holds**.

10. Review Tags.

- a. Tap **Shelf**, then **Tags**.
Note: Tags exist only for personal use and are not shared with the library or OverDrive.
- b. Tap a tag to show the tagged books.
- c. Tap **Actions** to rename or delete a tag.

11. Review the Libby app menu.

- a. Tap the icon in the top right corner to open the Libby menu.
- b. Tap the Libby icon on the left side to change her appearance.
- c. Review menu options.
 - i. *Note: This menu can also be used to quickly switch between libraries.*
 - ii. **See Library Cards** – view saved library cards & account limits.
 - iii. **Add A Library** – search for another library.
 - iv. **Set Up Libby**
 - 1. Access options for managing loans and holds
 - 2. **Show Setup Code** to sync library cards with another device.
 - 3. **Meet Libby (Again)**, tap **Back**
 - v. **Learn Libby** - watch Libby Academy videos to see short demonstrations of key features.
 - vi. **Help & Support**
 - 1. Visit **Libby Help**.

2. Submit a **Problem, Question, or Idea** to OverDrive Support staff.
3. **Take The Survey!** Allows users to provide feedback on their app experience.

12. Close Libby to finish.