

# MEET LIBBY – Demonstration Checklist Outline

*This checklist provides an 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**.
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 **I'll Mostly Read In Libby** to download and read books in Libby by default.

*Note: U.S. library patrons who own a Kindle can select **I'll Mostly Read On A Kindle** to send books to their Kindle faster. These patrons will need their Amazon account login information.*
    - v. Tap **Sign In With My Library Card** and enter the library login information.
    - vi. Tap **Enter The Library** to visit the digital collection.

*Note: The library card is automatically saved. You will not have to go through the interview process again unless you're setting up another device.*
3. **Highlight Libby's ease of use.**
  - a. Scroll down to a collection and tap the collection name to open.
  - b. Find an available eBook and tap **Borrow** from the collection page.
  - c. Tap **Borrow** again to download the book. A checkmark appears when the download is complete.
  - d. Tap **Open Book** to open and read using OverDrive Read technology.
  - 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.
  - 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 page.
4. **Browse the collection.**
  - a. Tap **Actions** to learn what you can do from the Home page.
    - i. **Explore Entire Catalog** – view all subjects in the digital collection.
    - ii. **See Library Cards** – view all saved library cards.
    - iii. **Add A Library Card** – add an additional library card.
    - iv. **View Branch Map** – locate a nearby library branch to apply for a library card.
    - v. **Go To Another Library** – find additional OverDrive-powered libraries.
  - b. Tap **Preferences** to apply preferences to the collections and searches.
    - i. **Availability** – show all titles or Available Titles only.
    - ii. **Sort By** – Popularity, Date Added, Release Date, and more
    - iii. **Format** – Books or audiobooks
    - iv. **Language** – for books in the digital collection
    - v. **Audience** – filter Juvenile, Young Adult, General Content, or Mature Content
    - vi. **Compatibility** – opt for Kindle compatible books only (*U.S. libraries only*)
  - c. Select **Everything** to change the availability preference to **Available Titles** (*this can be overridden later*).
  - d. Tap **Apply Preferences**.

- e. Scroll down to browse collections and note updates based on the **Available Titles** preference.
  - f. Note the title jackets: books with no icon are eBooks, audiobooks will display with headphones.
5. **Borrow another title.**
- a. Select title jacket to review the Title details page.
    - i. Note the ability to sample a title before borrowing it.
    - ii. Tap **Tag** to add a tag. (*Explain that tags organize books you Want to read, Loved, and/or Hated.*)
      - 1. Tap the plus (+) sign to create a custom tag with an emoji or up to 12 characters.
    - iii. Review the description and any available series information.
    - iv. Review title information, average user rating, subjects, and additional search results.
  - b. Borrow the title.
    - i. Tap **Borrow** at the top of the title details page.
    - ii. Tap the underlined lending period to change.
    - iii. Tap on the center of the library card to view account limits (*for loans and holds*).
    - iv. Tap **Borrow** again to confirm.
    - v. Allow the title to download, then **Open Book**.  
*Note: Tap **Keep Browsing** or **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.
6. **Manage Loans.**
- a. Tap **Shelf** and note the Libby tour guide.
  - b. Tap the downloaded book checkmark to stream the book
    - i. *Note: This will wipe the download. Press the cloud icon to download again.*
  - c. Tap **Manage Loan** to view loan options.
    - i. **Renew Loan** – typically available 72 hours before the loan expires
    - ii. **Return Loan To Library**
    - iii. **Send to Device** – manually send to a Kindle using an Amazon account (*U.S. libraries only*)
    - iv. **Tag**
    - v. View the title details page
    - vi. Library card information
    - vii. **Borrowing History**
    - viii. Title information (author, copies available, compatible formats, etc.)
  - d. Tap **Return Loan To Library**, then **Return!** to highlight how to return titles early.
  - e. Tap **Actions** to view additional options for managing loans.
  - f. Tap **Choose Download Behavior**. Review, then Hide.  
*Note: By default, books download automatically on Wi-Fi. Stream books to save space.*
  - g. Tap **Actions**, then **Select Reading Devices**.
    - i. Review options for downloading books to Libby on another device or to a Kindle device  
*Note: If you prefer to read on a Kindle, update library **Preferences** to Kindle-compatible books.*
    - ii. Tap **Hide** to close.

## 7. Place a Hold.

- a. Tap **Library** to revisit the library collection.
  - i. Tap the **Library** button repeatedly to return to the Home page.
- b. Search for books by subject category (such as historical fiction or mystery).
  - i. Tap the magnifying glass to perform a quick search, **OR**
  - ii. Tap the magnifying glass, then tap **MORE...** to perform an advanced search.
- 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**. Display unavailable titles and sort by popularity.
- d. Find a title that has a wait list.
- e. Tap on the small Libby icon to view wait list information.
- f. Tap **Place Hold**, then tap **Place Hold!**

## 8. Manage Holds.

- a. Tap **Keep Browsing** to return to the library, and note the reversed jacket cover.
- b. Tap **Shelf**, then **Holds**.
- c. Tap **Manage Hold** on a book and demonstrate how to edit a single hold.
  - i. Update email, disable automatic borrowing, or update hold state.
- d. *Optional: **Cancel the hold.***
- e. Return to the **Holds** page.
- f. Tap **Actions** to **Edit All Holds**.
  - i. Select **Synchronize Holds** to update all holds on the **Shelf**.

## 9. Review Tags.

- a. Return to the **Shelf**, then tap **Tags**.

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

## 10. Review Activity.

- a. Return to the **Shelf**, then tap **Activity**.
- b. The **Activity** timeline displays a list of books borrowed, placed on hold, and returned.
- c. Swipe left across an entry to remove it.
- d. Tap **Actions** to **Disable Activity Recording** or **Clear Entire Timeline**.

## 11. Review the Libby app menu.

- a. Tap the Libby icon in the top right corner to open the menu.
- b. Tap the Libby icon on the left side to change her appearance.
- c. Review menu options.
  - i. **Switch Library** or **Add a Library** – visit a saved library or search for another library
  - ii. **See Library Cards** – view saved library cards & account limits
  - iii. **Add A Card**
  - 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), Restart The Tour**, and more.
  - v. **Help & Support**
    1. Visit **Libby Help**.
    2. Submit a **Problem** to OverDrive Support staff.
    3. Share questions, ideas, and general feedback.

## 12. Close Libby to end.