Getting Started with Libby

This outline provides the suggested order of delivery for a 45 - 60 minute Getting Started with Libby training. Review the materials, then adapt the training with details specific to your library.

**Materials Needed**

* PowerPoint presentation
* An iOS device, Android device, or web browser (libbyapp.com)
* Video conferencing software (Zoom, WebEx, etc.)
* Projector if delivering in-person
* Demo library card

**Prepping your device and the Libby app**

* Download the Libby app if you haven’t already.
* Choose two unique titles in Libby.
  1. *Title A*

A screenshot of a book

Description automatically generated

A title from your collection that is offered as both an ebook and audiobook. The ebook format needs to be available to borrow, but there should be a wait list for the audiobook. This will be the title used to demonstrate searching, placing a hold, borrowing, and reviewing key reading features in an ebook. \**If the audiobook does not have a hold on it, borrow it on your personal device so there is a hold for the demo.*

* 1. *Title B*

Graphical user interface, application

Description automatically generated

An audiobook, borrowed and downloaded to your Shelf prior to the training. This will be the title used for reviewing key reading features in an audiobook.

* \*\*\*US libraries only\*\*\* Prompt Libby to ask where you would like to read your books by [resetting your reading preference](https://help.libbyapp.com/en-us/6013.htm?Highlight=reading%20books%20with) to the default (I Have No Preference).
* [**Download Rules** should be set to **Everything**](https://help.libbyapp.com/en-us/6005.htm?Highlight=download%20rules) to showcase that Libby automatically downloads titles for offline use when connected to Wi-Fi.
* Double tap  (**Tags**), shelf (**Shelf**), and Library (**Library**) within the navigation bar to make sure Libby is displaying the top of the main page of each page.
* Reset Libby – To reset the app, go to  > Your Information > Reset Everything \**Tags and timeline activity cannot be recovered when Libby is reset.*
* Refresh app store – Clear search and return to app store home page.
* If using a mobile device, set it to “do not disturb” so that you don’t receive phone calls or texts during the presentation.

Demonstration

**(iOS) Downloading & signing into the Libby app**

1. Open  (Apple App store).
2. Tap search within the app store.
3. Type **‘Libby’** into search bar, and select **Libby, By OverDrive**.
4. Instruct patrons to tap **Get** to begin installing.
5. Leave app store.
6. Navigate to and open the Libby app.
7. Tap **Yes** when Libby asks if you have a library card.
8. Tap **I’ll search for a Library** to type in your library name, city, or zip code.
9. Select your digital collection.
10. Tap **Enter Library Account Details** to enter your library card number and PIN.

**(Android) Downloading & signing into the Libby app**

1. Open  (Google Play).
2. Search for ‘**Libby’** and select **Libby, by OverDrive**.
3. Instruct patrons to tap **Install**.
4. Leave Google play.
5. Navigate to and open the Libby app.
6. Tap **Yes** when Libby asks if you have a library card.
7. Tap **I’ll search for a Library** to type in your library name, city, or zip code.
8. Select your digital collection.
9. Tap **Enter Library Account Details** to enter your library card number and PIN.

**Libby Basics**

You will cover each icon throughout the presentation but start the presentation with the library icon and then reorient attendees in the navigation bar throughout.

1. Tap Library(**Library**) to browse the library’s entire digital collection. Provide brief overview of:
   1. *Filters* – newest, popular, available now, etc.
   2. *Catalog* *guides* **–** If your library has a magazine guide, you can mention magazines here.
   3. *Curated collections* – Similar to displays or endcaps at the physical library.
   4. *Extras* – Extra learning or entertainment resources that are accessible through Libby.
2. Tap search (**Search**) to search for something specific.
3. Tap into the search bar.
4. Type *Title A* into the search bar.
5. Tap search or enter within the device’s keyboard to see all results.
6. Explain how you can visually tell the difference between the ebook and audiobook format (if applicable).

**Place a hold and borrow a title**

1. Explain the difference between **Borrow** and **Place Hold** using the search results from *Title A*.
   1. Tap **Place Hold** next to *Title A* in the audiobook format, then confirm.
      1. Tap **Keep Browsing** to return to the most recent search results.
   2. Tap on the jacket cover of *Title A* in the ebook format to view its title details.
      1. Tap **Borrow**.
      2. Tap the **maroon lending period**, located above the borrow button, to change. [\*\*1]
      3. Tap **Borrow** again to confirm.

**Review key reading features in an ebook**

1. Tap **Open Book**.
2. Explain Kindle process vs. reading in Libby. [\*\*2]
   1. Tap **Libby**.
3. Mention how to view reading progress in the footer menu.
4. Tap the center of the screen to hide the progress bars/reader menu.
5. Tap the right side of the screen to page forward in the book.
6. Tap the center of the screen to make the progress bars/reader menu reappear.
   1. Tap  to make changes to the appearance. [\*\*3]
      1. Tap **above the menu** to drop it off the screen and return to the text.
7. Tap the center of the screen to view the ebook menus and then tap **Back** in the upper left corner to leave the ebook. This should place you on the **Shelf**.

**Navigation Reorientation**

While on the Shelf, it’s good to reemphasize the purpose of the icons that were covered in the first half of the session before introducing more information.

1. Dismiss the **Now Reading Bar**.
2. Hover over Library (**Library**) and review its purpose.
3. Hover over search (**Search**) and review its purpose.
4. Introduce and explain shelf (**Shelf**).
   1. Without tapping into them, briefly explain Loans, Holds, Timeline, and Notices.

**Review key audiobook features**

1. Open *Title B* from your **Shelf** by tapping **Open Audiobook**.
2. Mention how to view progress in the header menu.
3. Tap **play** to begin playing the audiobook. [\*\*4]
4. Tap **pause** to stop the audiobook.
5. (optional) Time permitting, you can show how to change playback speed and set a sleep timer.
6. Leave the audiobook by tapping **Back**.

**Review Tags**

1. Dismiss the **Now Reading bar**.
2. Tap  (**Tags**) to view the tagged lists you’ve made. [\*\*5]

**Review the Libby menu**

1. Tap  (**Menu**).
   * Review library cards.
   * Review notifications.
     1. Under Settings, tap **Notifications**.
        + 1. By default, iOS and Android devices will get push notifications. You can turn them off or enable shelf notices (in-app notifications).
          2. When a hold becomes available, you’ll receive an in-app notification and you have 3 days to act on it. Borrow, Deliver Later [\*\*6], or Cancel. If you do not act during the 3-day pickup window, the “deliver after seven days” option will be automatically applied as a one-time courtesy.
        1. Tap **Back** to return to the settings and explain how to add labels in the navigation bar.
           1. Tap **Navigation**.
           2. Toggle off/on **Labeled Icons**.
           3. Tap **Back** twice to return to the main **Libby Menu**.
   * Review **Help & Support**.
     1. Type **Return** into the How can we help? field.
     2. Tap **Returning Titles** article.
     3. Tap **ask our support team** to reach out to tech support specialists.

**Additional Resources – Great for FAQs**

[Libby Help](https://help.libbyapp.com/): Libby’s help site covers everything from navigating the app to adding library cards. We always, always have the help site open during our webinars. It’s totally okay to do that, too. It’s not cheating!

[OverDrive Resource Center](https://resources.overdrive.com/): Our awesome Training Team at OverDrive has an entire catalog of how-to videos and on-demand webinars.

**Notes**

[\*\*1] If the default loan period is set to the longest lending period already, just point out the lending period (instead of showing them how to change it) and mention that loans return automatically. We are always trying to find ways to limit the amount of information the end-user must retain!

[\*\*2] We do not walk through the Send to Kindle process in-session as it requires signing into Amazon. It also interrupts the flow of the presentation. This is a good process to include in the post-event PDF so that anyone who would like to see the Send to Kindle process can review.

[\*\*3] “Reading appearance settings are ‘sticky.’ That means you only need to customize these settings once (per device). Libby will deliver future borrowed ebooks with those customizations in place.”

[\*\*4] Audiobooks in Libby are designed to play in the background, so if you minimize the app or leave the audiobook without tapping pause, the narrator will continue to read the book.

[\*\*5] Tags aren’t a “need to know” feature. It’s okay to be brief here and point to the Tips and Tricks PDF to learn more.

[\*\*6] There is no limit on how many times a reader can choose to Deliver Later.

[\*\*7] Tapping Add Library allows you to add a library card from a different library system. Tapping Manage Cards allows you to add additional library cards from the same library. This is handy for families that like to share a device.