

Training to Solve Tech Problems:

A Hands-on Approach

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Do Library Staff Want Tech Training?





What we did at FVRL:

2012: Launched eBook Collection

2012: Procedural checklists shared after launch

2014: Classroom training with a mix of problem solving and procedures

2016: Self directed challenges using staff devices

2018: Hands-on workshop focused on problem solving



What is different about this approach?

Frame technology questions as customer service

Uses special questions, like readers' advisory

Provide a toolbox for these types of questions

Throw away the procedural checklist approach



Hands-on

Real devices

Fake patrons with real accounts

Real devices + real accounts + real problems to solve

Realistic practice in a safe environment



The Training Itself





Natural Problem Solvers

Normalize technology questions: more like any other customer service interaction

Connected participants to their existing problem-solving tendencies



Question or problem?

Not everything needs problem-solving

Initial account setup follows instructions

Not a problem? Treat it like any other reference question

Problem we don't help with? Treat it like any other reference question



Technology Assistance Conversation

The goal--what is the patron trying to do?

Where the patron **started**. On what device? (Catalog? Vendor website? App?)

What **steps** did the patron take after that?

Where did the patron get **stuck**?

What has **already been tried** to resolve the issue?



Tuning in

Handout

Corny skits

Listen for clues



Prime Suspects

Library card account

Wifi connection

(Try to) log in as the patron on a staff computer



Look for solutions

[Website information](#) about the service

[Library FAQs](#) about the service

Vendor sites and help



Let's Do This!





Break into groups

Your group needs:

- A Chromebook
- A Device
- The Scenarios (a set of 4)

Take turns:

- One person plays the patron, using the scenario and a device
- One person plays the staff person, using the Chromebook as a staff computer



Lessons Learned





Staff time away from “work”

Classroom training takes people away from work

Sessions were 2 hours long

- One hour learning skills
- One hour practicing problem solving

All Public Services staff trained (158 branch employees)

Not a “one and done”



Staff time: Resetting scenarios

Scenarios created and tested by Reference Services staff

Library card accounts (~40) created by Systems staff

Seven professional staff provided training (two per training)

Reference Services staff reset scenarios between trainings

Staff charged devices between trainings



Staff time: resources for front-line

FAQs created and maintained to help staff as well as patrons

Website descriptions created to provide initial setup instructions and to link to vendor help



Survey Says

Desired outcome: increased comfort level with technology questions

Measured before and after the training

Average increase was 20%



The one complaint

“More time with scenarios!”

“I want to do the other scenarios!”

“Can you send the rest of the scenarios to my branch?”

“Training was great, but there needs to be more time for working on the devices. . .”

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SKIT 2: CHECKED THE BOOK OUT THREE DAYS AGO, CAN'T FIND IT.

Patron: Okay, I have to tell you, I am really frustrated with the library right now.

Staff: Uh-oh. Something obviously went wrong! What happened?

Patron: I checked an eBook out three days ago - it was American Sniper, I've been waiting weeks for it - and I started reading it, and then it disappeared. And then it came back, and disappeared again. This happens all the time.

Staff: I can see why you would be frustrated! How did you start, and where did you run into trouble?

Patron: I had the book on hold, and I got an email saying the book was checked out to me. I followed the link in the email and signed in, and the book was on my Loans page.

Staff: You started in your email, okay. I see you have the iPad with you - do you read your email on the iPad?

Patron: I was on my iPad when I read the email about the book being available.

Staff: Got it.

Patron: I like to read on my iPad, that way I can take my book with me when I go places.

Staff: Okay, so you saw the email on your iPad, you tapped the link, it took you to OverDrive, and you signed in?

Patron: Yes.

Staff: How did you sign in?

Patron: I used my card number and PIN.

Staff: No trouble signing in? No error messages?

Patron: Nope. It let me right in.

Staff: And when you signed in, what happened?

Patron: I went over to My Account and tapped on it, and clicked "Loans."

Staff: Excellent! So far, so good. I'm going to have you sign in on your iPad now, so we can take a look at your account.

Patron: Sure. I use my library card number to sign in - like this - and I go to my Loans shelf, and you can see, there's the book.

Staff: Yep, sure enough. Okay, now you want to read the book. How do you do that?

Patron: I tap "Read Now in Browser."

Staff: Ah. I think I see the problem! Read Now only works while you are on WiFi. Let's install the OverDrive app so you can download your book to read anytime until it's due.

Scenario 1

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have and get the device mentioned before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Kindle eReader

Open by saying: I can't download a book.

Where you started: On the OverDrive website

Where you got stuck: I checked out a book and tried to download it. It says in OverDrive that the book is checked out, but when I look for it on Amazon I don't see it.

What you've tried so far: I logged in on my computer, and I can see the book on my Loans shelf.

Additional info:

- You are familiar with OverDrive.
- You have checked out and downloaded Kindle books successfully before.
- You are the only one in your household who uses OverDrive.
- You have only ever had one library card.
- You have no other mobile devices, except a flip phone.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:
- Amazon account password:

NOTES:

Device you need: Kindle eReader

Scenario 1 solution: the patron chose EPUB format, rather than Kindle format.

Where to find the information to answer the question:

- <http://ask.fvrl.org/faq/210473>

Solutions:

- The patron could use OverDrive Read on their computer to finish the book (although this would not make it possible to return the book early).
- The patron could sign in to their OverDrive account to return it from the Loans page, and check it out again, in order to select Kindle format.
- (Pretend to) ask on Spark for someone to return the book for the patron.

SETUP:

- Set up email account, OverDrive account, Amazon account
- Check out and download an eBook in EPUB format to computer with ADE

RESET:

- Check out eBook (if it's expiring) and select ePub format by downloading to computer

Scenario 2

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Kindle Fire HD

Open by saying: I got a “there is something wrong with your library card” message.

App on your device: OverDrive app for Kindle

Where you started: In the OverDrive app

Where you got stuck: I tried to sign in to OverDrive with my library card number and PIN like I usually do, but it wouldn't let me.

What you've tried so far: It saves my library card number, so that's nice. I like not having to type the whole thing in every time. But just in case, I went and got my library card and hand-typed the number in to be sure it was right. Then I tried a couple more times to log in and got the same message.

Additional Info:

- You have only ever had one library card.
- No one else uses your Kindle.
- You are the only person in your household who uses OverDrive.
- You recently got a new phone number.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- Birthdate:

NOTES:

Device you need: Kindle Fire HD

Scenario 2 Solution: The patron is using an incorrect PIN to sign in.

Where to find information to solve the problem:

- FAQs - "[OverDrive says there is something wrong with my library card.](#)"
- OverDrive Help - "[What to do if you're having trouble signing into your library's OverDrive website.](#)"

Solutions to solve the problem:

- Double-check the patron's information in Workflows and provide the correct PIN.
- Follow the instructions on the FAQ to change the patron's PIN number.

SETUP:

- Kindle Fire HD with OD app installed & set up
- Change PIN in WF to [...]

RESET:

1. From the OverDrive app, return anything checked out (whether or not it's been downloaded)
2. Log out of the patron's account *within* the app (but not the app itself)
3. Check WorkFlows to make sure the PIN is still [...]

Scenario 3

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Google Nexus

Open by saying: It won't let me sign in.

App on your device: OverDrive app.

Where you started: The OverDrive app.

Where you got stuck: I went on the OverDrive website, and picked out a book and tried to check it out. But it told me there was a problem with my library card.

What you've tried so far: I looked the book up again and tried again to check it out, but I got the same message. This just started happening, right after I got back from vacation. It's never happened to me before. I didn't know what else to try, so I came to the library.

Additional Info:

- You are familiar with OverDrive.
- You saw when you got back from vacation that the app hadn't saved your library card number, even though you checked the "remember my number" box the last time you typed it in.
- You are the only one in your household who uses OverDrive.
- You have only ever had one library card.

Patron details:

- Name:
- Card #:
- PIN:
- Address:
- Phone #:
- Email address:
- OverDrive account password:

NOTES:

Device you need: Google Nexus

Scenario 3 solution: the patron is typing the card number incorrectly.

Where to find the information to solve the problem:

- Workflows (card # is actually ...)

Solutions:

- Double-check card number in Workflows, verify patron's identity and provide the correct card number. Watch the patron sign in, to be sure the issue is resolved.

SETUP:

- Card in OK status
- OverDrive app installed on Nexus & logged in with OverDrive account
- No login information stored within the app (Add a title > [your library] OverDrive website login)

RESET:

1. Open the OverDrive app & tap Add a Title, then tap on the icon of the 3 standing books.
If you're prompted to sign in, skip to step #3.
2. Delete app cookies in the Settings menu of the app to clear the saved login (to the OD website within the app)
3. Reverse any changes made to the library card/PIN

Scenario 4

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: iPad mini

Open by saying: I borrowed a movie yesterday afternoon to watch on my iPad last night, but when I went to My Hoopla in the app, it told me I hadn't borrowed anything yet.

App on your device: Hoopla app

Where you started: I used my work computer to check out, but I started by opening the Hoopla app on my iPad when I wanted to watch.

Where you got stuck: I couldn't find the movie. I just kept seeing kids' stuff. *Darby O'Gill and the Little People* isn't really my kind of show.

What you've tried so far: I tried exiting Hoopla and going back in, and nothing changed. I eventually gave up on my card, created another account with my husband's card and used that. It worked with his card! Oh, well. At least I got to watch the movie.

Additional Info:

- Your daughter usually watches videos on your iPad as a treat.
- The movie you wanted to watch is PG-13 or R--you can't remember which.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- Hoopla password:

Please DO NOT check anything new out to [patron name] in Hoopla, as [your library name here] pays per checkout, and there is a limit of [#] per month.

NOTES: Reset only 1 or 2 days before next session due to short checkout window.

Device you need: iPad Mini

Scenario 4 solution: The account is set to Kids Mode.

Where to find the information to solve the problem:

- Settings has a toggle switch for Kids Mode
- Hoopla help, under Kids Mode: <https://www.hoopladigital.com/help>

Solutions:

- Tap My Hoopla in the app, then tap the gear icon to go to Settings, and turn off Kids Mode, OR
- Sign out of the app & sign back in. Kids Mode doesn't "stick."

SETUP REQUIREMENTS:

- Create Hoopla account with Card 4 and PIN
- Install Hoopla app on iPad & sign in
- Check out a PG-13 or R movie
- Set the account to Kids Mode

RESET:

- If the adult checkout will expire before the next training session, check out a new title
- Switch the app back to Kids Mode

Scenario 5

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Google Nexus

Open by saying: I'm missing the last third of my audiobook. I probably just need to download it again to fix that. But Libby downloads automatically, and I can't tell it to download again.

App on your device: Libby

Where you started: Libby app.

Where you got stuck: The book was playing just fine on my Nexus, and then all of a sudden, the book stopped. It didn't say "the end" or anything. It just stopped.

What you've tried so far: I thought maybe there was something wrong with the book, so I tried listening to some of it on my computer. The whole book is there if you do OverDrive Listen; I could move the little dot all the way to the end of the book. So I'm pretty sure downloading it again will fix it, I just can't see how.

Additional Info:

- The book is still checked out to you, and won't be due for a while

Patron details:

- Name:
- Card #:
- PIN:

NOTES:

Device you need: Nexus

Scenario 5 solution: tapping “Downloaded” and choosing “Remove Download” deletes the downloaded copy; tapping “Download” again re-downloads the book.

Where to find the information to solve the problem:

- Libby Help - [“Downloading or deleting titles”](#)

Solution:

Delete the downloaded copy, then re-download.

1. Connect the device to wifi
2. Open the Libby app, tap “Shelf,” find the problem book, then tap the circle to the right of the book.
3. Tap “Remove Download.”
4. Confirm “Yes, Wipe Download”
5. When the circle with a checkmark changes to a dotted circle, tap “Download”
6. Confirm “Download for Offline Use”

SETUP REQUIREMENTS:

- Libby app installed and set up with Scenario 5 card & PIN
- Check out audiobook with Scenario 5 card
- Download to Libby app (we’ll just pretend it’s only partially downloaded)

RESET:

- Check out new audiobook if previous one will expire before next training session
- Download to Libby app

Scenario 6

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: iPad Mini

Open by saying: It says in my account that an audiobook is checked out to me, but I went to OverDrive and it isn't there.

Where you started: I signed in to my account.

Where you got stuck: It says the book is checked out to me. I should be able to see it in OverDrive, but it isn't on my Loans shelf.

What you've tried so far: I double-checked my account, and then I signed out of OverDrive and back in. The book just isn't there.

Additional Info:

- You have only ever had one library card.
- No one else in your household uses OverDrive.
- You read the information in your account correctly; the book is checked out to you.
- You use more than one of the library's digital media collections.
- You usually check out & place holds through the library catalog.
- You've had this book on hold for a long time.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:
- Title is

NOTES:

Device you need: iPad Mini

Scenario 6 solution: The book is an RBdigital title, not an OverDrive title.

Where to find the information to solve the problem:

- The library catalog (sign in and check the “digital checkouts” tab)
- The OverDrive and RBdigital websites
- The OverDrive and RBdigital apps

Solutions:

- Sign in to the library catalog and look at the vendor listed under “digital checkouts” - RBdigital displays as .WMA MP3 (Windows Media Audio, MP3 format audiobook.)
- Sign in to OverDrive and RBdigital - either on the websites, or in the apps - and check the Loans/Checkouts shelves.

SETUP REQUIREMENTS:

- RBdigital username:
- RBdigital account password:
- Set up RBdig & OverDrive apps
- RBdigital book checked out via catalog

RESET:

- Return the RBdigital title (if it has downloaded to the app)
- Check out a new one via catalog (so it won't be already downloaded to the app)
- Make sure there are no other titles checked out to this card (i.e. in OD)

Scenario 7

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Kindle Fire HD

Open by saying: I'm trying to put the Libby app on my Kindle, but it won't let me install it.

App on your device: OverDrive app for Kindle Fire.

Where you started: Somebody told me last time I was at the library that I should try the Libby app, so I tried looking for it in the App Store.

Where you got stuck: There isn't anything called "Libby" in the Store. That I could find, anyway.

What you've tried so far: I looked on the library website, but I can't see any way to get it there, either. So I came to the library.

Additional Info:

- By "App Store," you mean the Amazon App Store.
- By "the library website," you mean the eBooks & eAudio page on the [your library] website.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: Kindle Fire HD

Scenario 7 solution: there is no Libby app for Kindle

Where to find the information to solve the problem:

- Libby Help - "[What devices are compatible with Libby?](#)"
- FAQ - "[How do I use Libby?](#)"

Solutions:

- Use the OverDrive app

SETUP REQUIREMENTS:

- Set the OverDrive app up with Scenario 7 login info

RESET:

None needed

Scenario 8

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Google Nexus

Open by saying: I checked out an ebook, but I don't know where it went.

App on your device: n/a

Where you started: I was on the library website looking at books, and I found one I wanted to check out.

Where you got stuck: I clicked "Borrow" and the box came up and asked for my card number and PIN. I put those in, and then the box changed and I clicked a circle, and then the book opened, so I started reading. But today it's gone.

What you've tried so far: I tried checking the book out again, but it said I already had it checked out. And I looked at my account, and that said I had it checked out. So I checked the book out, but I don't know where it is.

Additional Info:

- You clicked the circle next to HTML.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:

NOTES:

Device you need: Nexus

Scenario 8 solution: patron used the library catalog to check the book out, and chose HTML format. HTML basically means “read in browser,” and does not initiate download.

Where to find the information to solve the problem:

- FAQ - [“How do I use OverDrive?”](#)
- OverDrive Help - [“Learn about OverDrive Read and OverDrive Listen”](#)
- Still says “Download” in Digital Checkouts

Solutions:

- Download the OverDrive app or Libby and set it up.
- Download the book to the app.

SETUP REQUIREMENTS:

- Check book out to Scenario 8 card via the catalog, but do not download
- Uninstall OverDrive & Libby apps

RESET:

- Return checked-out book IF a format has been chosen OR it'll expire before the next training session
- Uninstall OverDrive &/or Libby
- Check another book out to Scenario 8 card via the catalog (if necessary)

Scenario 9

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: ipad2

Open by saying: Where's my book?

App on your device: Libby app

Where you started: I tapped on Libby and went to my shelf, but my hold wasn't there.

Where you got stuck: I got the email saying my hold was available and checked out to me, but it doesn't show up on my Shelf like it should. I see it under Holds, and it still says I'm on the Wait List. The only thing on my Shelf is a book I already read.

What you've tried so far: I don't know what to try. I checked a book out when I was at the library last week, and that worked just fine.

Additional Info:

- You did receive an email from OverDrive saying your hold was available.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: ipad

Scenario 9 solution: WiFi off/the patron needs to accept the library Internet use policy.

Where to find the information to solve the problem:

- FAQ - "[How do I connect to the library's free wifi?](#)"
- Website: [Library Internet Use Policy](#)

Solutions:

1. Open the device browser and navigate to the [your library name here] website to trigger the Internet policy message *or* -
2. Turn off the device's wifi capability, then turn it back on, forcing the device to search for a signal, rather than use cached data to complete tasks.

Note: If you get a "synchronization failed" message in the Actions menu even after fully connecting to wifi, close the app and reopen it.

SETUP REQUIREMENTS:

- Set up Libby app with scenario 9 card & PIN
- Check out & download a book
- Check out a different book with a different card (one that has only 1 copy!) on a different device
- Use the scenario 9 card to place a hold on that book
- Get IT to make the Nexus forget the staff wifi, then turn wifi off
- To trigger the hold, return the book that's checked out to a different card

RESET:

- Connect to library's public wi-fi (if needed)
- From the Libby app, return all but one book that might be checked out with the Scenario 9 card
- Check out a different book (one that has only 1 copy!) with a different card on a computer--Use ...
- Use the scenario 9 card to place a hold on that book from within the Libby app
- Turn wifi back off
- To trigger the hold, return the book that's checked out to a different card (on a computer)

Scenario 10

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: none--you left your iPad at home

Open by saying: I tried downloading an ebook to my iPad and it didn't work. It worked on my phone, but not my iPad.

App on your device: OverDrive app

Where you started: I downloaded an ebook to my iPhone. That worked fine; I've done it before.

Where you got stuck: When I tried to download the ebook to my iPad, too, I got a weird error message: 'license fulfilled by another user.'" They're both Apple, you would think it would work, even though the iPad is old and my phone is brand-new.

What you've tried so far: Well, I thought maybe I needed to update the app on my iPad, because I haven't used it in a while. So I did the app update thing in my App Store. That didn't help - I still got the same message. So everything is up to date. I don't know what else to try.

Additional Info:

- You always use your library card and PIN to sign in.
- Your library card is [your library]-resident, and there are no account issues.
- You are the only person who uses the phone and iPad.
- You are the only person in your household who uses OverDrive.
- Your phone battery is so low, you can't turn the phone on until you charge it.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: none

Scenario 10 solution: Patron needs to uninstall & reinstall the app on the iPad, logging in with the same method used on the iPhone--ideally an OverDrive account, but it'll work with any login method as long as they match.

**An OverDrive account is not necessary with Libby, because the user is not involved in the download process. Libby authorizes itself, links the book to the user's card number and downloads in Libby format.*

Where to find the information to solve the problem:

- OverDrive Help: [What to do if you get an error saying an ebook has been downloaded or fulfilled by another user or account](#)

Solutions:

1. The patron can uninstall & reinstall the app, signing in with the same method as the iPhone's OverDrive app. *Or...*
2. Deauthorize the OverDrive app & reauthorize with the OverDrive account
3. The patron can install the Libby app on one or both devices.

SETUP REQUIREMENTS:

- Check ebook out with Scenario 10 card in OverDrive

RESET:

- Check out a new ebook if the previous one will expire before the next training session

Scenario 11

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Kindle eReader

Open by saying: I checked this book out and I can't read it on my Kindle eReader.

App on your device: N/A

Where you started: In OverDrive on my computer.

Where you got stuck: I picked a book out and clicked on Borrow, and typed in my card and PIN and checked the book out. And usually it sends me to Amazon, but this time it didn't. And the book didn't go to my eReader.

What you've tried so far: I double-checked OverDrive, and the book is on my Loans shelf. It is checked out to me. But I can't try to download it because there isn't anything that lets me choose Kindle. And even though I didn't get asked to sign in to Amazon I did check my Amazon bookshelf, just in case. But the book isn't there. How can it be checked out to me in OverDrive but not on Amazon?

Additional Info:

- Your library card is in good standing.
- You didn't see any error messages.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: Kindle eReader

Scenario 11 solution: patron accidentally checked out an audiobook.

Where to find the information to solve the problem:

- Sign in to the patron's OverDrive account on a staff computer

Solutions:

1. Ask patron whether they want to listen to the book on a different device (such as a smartphone or the computer used to check out) and show patron instructions for how to set up phone/computer to play the book, OR
2. Return the book from the OverDrive website.
3. (Pretend to) ask, via Spark, to have the book returned for the patron.

SETUP REQUIREMENTS:

- Audiobook checked out to Scenario 11 card

RESET:

- Make sure the audiobook checkout won't expire before the next training session OR
- Check out a new audiobook

Scenario 12

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: iPad Mini

Open by saying: OverDrive won't let me check anything out.

App on your device: OverDrive app

Where you started: I got the OverDrive app and set it up with my old PIN, which was the last four numbers in my old phone number. And then I changed my phone number, and I changed my PIN to match.

Where you got stuck: Now I can't check anything out. It tells me there is a problem with my library card.

What you've tried so far: I tried turning my iPad off and on, but that didn't help. So I tried checking a book out with my computer, and that didn't work either - even though it worked fine before I changed my PIN.

Additional Info:

- You use your card # to sign in to OverDrive.
- You don't have your library card with you, but you've memorized the # & PIN.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- Phone #:
- Address:
- Birthdate:

NOTES:

Device you need: iPad Mini

Scenario 12 solution: The problem isn't the PIN. The patron is typing the card number incorrectly.

Where to find the information to solve the problem:

- Workflows

Solutions:

- Give the patron the correct card number:

SETUP REQUIREMENTS:

- OverDrive app installed & signed in w/password (but not to OD site within the app)

RESET:

- Return any checked-out titles
- Make sure the Scenario 12 card and PIN are correct in Workflows
- Delete app cookies if necessary to remove any saved login info

Scenario 13

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: iPad

Open by saying: I was listening to my audiobook in my car and all of a sudden it stopped playing. But I wasn't at the end of the book!

App on your device: RBdigital

Where you started: On my iPad.

Where you got stuck: I found a book and checked it out and downloaded it. Then I started playing it in my car. It played on my iPad fine for about half the book. Then all of a sudden, it quit playing.

What you've tried so far: I tried to back up and start again, but it still stopped in the same place. Then I tried going out of the app and back in, and then I restarted my iPad. None of that seemed to help.

Additional Info:

- You had the iPad in your hand and were walking around the house while the book downloaded.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- RBdigital username:
- RBdigital password:

NOTES:

Device you need: iPad

Scenario 13 solution: The book did not completely download.

Where to find the information to solve the problem:

- RBdigital Help site: <http://fortvancouverwa.rbdigital.com/#/help/troubleshoot>

Solutions:

- Turn wifi back on, open RBdigital app, and book should resume downloading.
- If not, tap the Download button on the book's cover

SETUP REQUIREMENTS:

- iPad with RBdigital app installed and set up with Scenario 13 username/password
- Check out RBdigital book with Scenario 13 account but *turn off wifi halfway through downloading*

RESET:

- Return any checked out books
- Check out another book but *turn off wifi halfway through downloading*

Scenario 14

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: none

Open by saying: My wife hasn't been getting notified that holds are checked out to her. They just appear in her account.

App on wife's tablet: OverDrive app

Where you started: My wife signs in to OverDrive and sees books on her Loans page that only have 2 weeks left before they expire.

Where you got stuck: Twice now this has happened. When she looks in the app and on the website, there are suddenly new books. This first happened about a week and a half ago, and it happened again yesterday.

What you've tried so far: We were waiting until I next came to the library to have someone look into it for us.

Additional Info:

- Your wife has her own library card.
- Your wife recently got a new email address.
- Your wife has an OverDrive account but usually signs in with her card number & PIN.

Patron's wife's details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: none

Scenario 14 solution: The notices are going to the old email address; the patron needs to update the email address.

Where to find the information to solve the problem:

- FAQ - "[How do I update my email address in OverDrive?](#)"
- OverDrive Help - [How to change your email address for hold notifications](#)

Solutions:

- On a computer:
 - Sign in to OverDrive.com & click on account icon/name
 - Choose "Settings" & change email listed under "personal details."
 - Verify email address by clicking link in email sent to new address
- On the OverDrive website:
 - Sign in, then click/tap on "My Account" & choose "Holds"
 - Click/tap "Edit Email" under an existing hold & type new address
 - If no existing hold, place one & then edit address
- In the OverDrive app:
 - Tap the Menu, then tap "Accounts"
 - Sign in to OverDrive account
 - Tap on account icon & change email address in Settings under "Personal details"
 - Verify email address by clicking link in email sent to new address
 - OR**
 - From the Bookshelf, tap "Add a title"
 - Tap 3-book icon & choose "Holds"
 - Click/tap "Edit Email" under an existing hold & type new address
 - If no existing hold, place one & then edit address

SETUP REQUIREMENTS:

- Create Scenario 14 OverDrive account using [old email address] & verify it
- List [new email address] as current email address on Scenario 14 pg 1
- Place a hold with the old email address--*on something checked out to a different card # so it won't become available before the training session.*
- Check out any available title so there's something on the Loans page

RESET:

- Erase the "new" email in OverDrive and input the "old" email address if necessary.
- Keep one checkout, edit any holds to be the old email address or place new hold

Scenario 15

You are acting as the patron. Your partner will be a staff person helping you troubleshoot. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: iPad Mini

Open by saying: I want to add my son's card to my Libby account, but I can't.

App on your device: Libby and OverDrive both.

Where you started: Libby app.

Where you got stuck: I tried to add his card, and it told me there was a problem with my card, and I needed to talk to the library.

What you've tried so far: Nothing. It just kept telling me to talk to the library.

Additional Info:

- You and your son live here in the library district.
- You are a regular OverDrive user and check things out frequently.
- You share an iPad with your son.

Patron details:

- Name:
- Dad's Card #:
- Dad's PIN:
- Dad's Email address:
- OverDrive account password:
- Son's Card #:
- Son's PIN:

Scenario 15 NOTES:

Device you need: iPad mini

Scenario 15 solution: the patron's son has a blocked card.

Where to find the information to solve the problem:

- FAQ: "[OverDrive says there is something wrong with my library card.](#)"
- Workflows

Solutions:

- The patron can either pay the bill or - if applicable - return the lost item.
 - FAQ: "[Why do I have a bill on my account?](#)"
 - FAQ "[How do I pay a bill?](#)"

SETUP REQUIREMENTS:

- Set up Libby app with Dad's card
- Set up OverDrive app (just in case) with Dad's card
- Son's card is a blocked card in Workflows--DO NOT MODIFY

RESET:

- Double check Son & Dad's cards in Workflows to make sure nothing has been changed

Scenario 16

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: none

Open by saying: RBdigital doesn't want to download my book to my computer.

App on your device: Desktop version of the app

Where you started: I was on my computer and I looked at RBdigital and saw an audiobook that I wanted. I borrowed the book, and that went fine, and then I tried to download...

Where you got stuck: I couldn't open the file because I couldn't get into the app any more.

What you've tried so far: I tried a couple of times to download the book and kept getting stuck at the same point. So then I tried to download it to the app on my phone, because I know that works. And it did. But I want to be able to listen on my computer, too. I always could before.

Additional Info:

- You haven't used OneClick on your computer for close to 2 years; usually, you use it on your phone, but you just got really nice computer speakers.
- You have only ever had one username/password combination.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- RBdigital username:
- RBdigital password:

NOTES:

Device you need: none

Scenario 16 solution: The patron is using an old version of the RBdigital Media Manager (desktop app.)

Where to find the information to solve the problem:

- RBdigital Help pages - ["Support" tab](#)
- Library website eBooks & eAudio page

Solutions:

- Install the newest version of the app

SETUP REQUIREMENTS:

- Check book out in RBdigital with Scenario 16 card

RESET:

- Check out a new book if it will expire before the next training session

Scenario 17

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Nook Color

Open by saying: Someone gave me this Nook because they never used it. I want to read ebooks, but I can't put the OverDrive app on it.

App on your device: No OverDrive app.

Where you started: I tried to put the OverDrive app on it, but as soon as I got to the App Store I got an error message.

Where you got stuck: I can't find it in the App Store. I can't find anything in the App Store, actually.

What you've tried so far: I pressed the little N at the bottom, and that brought up the menu. I tapped "Apps" and it brought up the App Store. I tapped Shop Now, but it said, "Sorry, a problem has occurred. Please try again. If you continue to receive this error visit nookcolor.com for help." I checked, but I was connected to the Internet. I can't get the message to go away.

Additional Info:

- You are comfortable with technology and know how to download an app.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: Nook Color

Scenario 17 solution: Barnes & Noble stopped supporting the Nook Color in 2015 and closed the Nook App Store in 2016. There is no (low-tech) way to put a new app on the Nook Color.

Note: There is a high-tech way, and it isn't particularly difficult, if anybody wants to play around with an old NC. Lifewire has a clear how-to article: [How to turn your Nook Color Into An Android Tablet](#). This is a challenging solution.

Where to find the information to solve the problem:

- [Website eBooks & eAudio page](#) (there's no OD app for Nook Color)
- Google "Nook App Store" - there are plenty of articles like this one from The Verge: "[Barnes & Noble is shutting down the Nook App Store on March 15](#)"

Solutions:

- The device can still be used as an eReader, without an app. Teach the patron to download to Adobe Digital Editions and [transfer the book to the Nook Color](#).

SETUP REQUIREMENTS:

- Nook Color with no OverDrive app installed
- Laptop with Internet access
- Scenario 17 card & PIN

RESET:

- N/A

Scenario 18

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: none

Open by saying: How come I can't borrow anything in Hoopla?

App on your device: No app; using web browser

Where you started: The Hoopla website on my computer at home.

Where you got stuck: When I tried to check out a movie.

What you've tried so far: I signed in with my email and password like I always do, but when I tried to get a movie, a message popped up saying something is wrong and I should talk to the library.

Additional Info:

- You use Hoopla every weekend.
- You recently got a cell phone to replace your landline, with a new number.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- Hoopla password:

NOTES:

Device you need: none

Scenario 18 solution: The patron is using an incorrect PIN

Where to find the information to solve the problem:

- Hoopla account settings
- Workflows
- Hoopla help, under Error Messages: <https://www.hoopladigital.com/help>

Error message reads: Yikes! Something is wrong with your library card or PIN. Please double check your info in settings and if you still have issues contact your local library at [your # here] for support.

Solutions:

Provide patron with the correct PIN, and help her change the PIN in her hoopla account.

SETUP REQUIREMENTS:

- PIN in Hoopla:
- PIN in WF:

RESET:

- Make sure Hoopla PIN is set to [...] & WF to [...]
- Return any borrowed titles

Scenario 19

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: none

Open by saying: I can't log in to Hoopla. It says to talk to the library.

App on your device: N/A

Where you started: On Hoopla's website.

Where you got stuck: I tried to create an account, but I didn't even get that far. It didn't like my card number.

What you've tried so far: I double-checked my card number and I even placed a hold on a library book - a real one, I mean, a paper book - so I know the card and PIN are right. I don't know why I can't create an account.

Additional Info:

- You live in [outside library district] but work in [inside library district]
- You use Kanopy all the time, but the movie you want today is in Hoopla instead

Patron details:

- Name:
- Card #:
- PIN:
- Email address:

NOTES:

Device you need: none

Scenario 19 solution: the patron isn't eligible for Hoopla, because it's a reciprocal card.

Where to find the information to solve the problem:

- Workflows
- [Library website - library cards page](#)

Solutions:

- Show the patron the information about reciprocal cards, then provide information about options [other Library] offers to their patrons.

SETUP REQUIREMENTS:

- Scenario 19 card and PIN, with a RECIPROCAL account profile

RESET:

N/A

Scenario 20

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: N/A

Open by saying: How come I can't log in to Ancestry?

App on your device: N/A

Where you started: The library website.

Where you got stuck: I tried to click on Ancestry and enter my card number and PIN, but it wouldn't let me in.

What you've tried so far: I double-checked my card number and PIN, but I was typing those correctly. Ancestry just wouldn't let me in.

Additional Info:

- Usually you use Ancestry at the [Your Library], when they do the Genealogy workshops.
- You want to work on your genealogy research from home

Patron details:

- Name:
- Card #:
- PIN:

NOTES:

Device you need: none

Scenario 20 solution: the patron is trying to use Ancestry from home, but it is in-library use only.

Where to find the information to solve the problem:

- [Library website / genealogy page](#)

Solutions:

- Show the patron the website genealogy page and point out the icons indicating whether the database can be used outside the library.

SETUP REQUIREMENTS:

- none

RESET:

- N/A

Scenario 21

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: iPad

Open by saying: I'm searching for an author in OverDrive, and I KNOW we have her books because I just read one, but nothing is coming up in the search results.

App on your device: OverDrive

Where you started: OverDrive website within the app

Where you got stuck: On the results screen

What you've tried so far: I've searched multiple titles and authors in both the regular search and even the Advanced search. I signed out and back in. I closed the app and reopened it. I even uninstalled and reinstalled.

Additional Info:

- You have been reading ebooks & listening to eAudiobooks for a while now.
- Someone at the library showed you last week that there are a few settings you can customize.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: iPad

Scenario 21 solution: Patron had chosen “Mature adult” in the OverDrive account Settings

Where to find the information to solve the problem:

- Settings in OverDrive account
- OverDrive Help: [How do I use the “Audience” or “Maturity levels” setting on my library’s OverDrive website?](#)

Solutions:

- Sign in to the patron’s OverDrive account, go to Settings, and change the audience level back to “All audiences” or even “General adult” (to filter out kids books & erotica)

SETUP REQUIREMENTS:

- OverDrive app set up on iPad & logged completely in with Scenario 39 OD account
- In account Settings, choose “Mature adult”

RESET:

- Change the audience preference in Settings back to “Mature adult”
- Make sure the OD app is completely signed in and remembers the card # so that no login prompt comes up when tapping on the 3-books icon or My Account.

Scenario 22

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Google Nexus

Open by saying: I used to be able to see all the books in Libby, the stuff that I could check out right away and stuff I needed to place on hold. Now I can only see available books.

App on your device: Libby

Where you started: It's been like this for a while. I don't know when it changed, exactly. Just all of a sudden I noticed that none of the books said "place hold."

Where you got stuck: As soon as I noticed that nothing said "place hold." I checked the OverDrive website, and I could see a lot more books. There's a total number of books in Libby, but that number doesn't match the website.

What you've tried so far: I didn't really know what to try. I didn't want to uninstall the app because I was afraid I'd lose my checkout history. I've just been placing holds on the website.

Additional Info:

- N/A

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: Nexus

Scenario 22 solution: The patron used the “preferences” feature on the home screen. Any options you select in Preferences will apply to every search from then on until you open Preferences and undo (or change) your preference settings.

Where to find the information to solve the problem:

- Libby Help - [setting list preferences](#)

Solutions:

- The patron needs to tap “Preferences” and change the settings, then tap “apply preferences.”

SETUP REQUIREMENTS:

- Libby app set up on Nexus with [...] card & PIN
- Preferences set to: Availability > Available titles

RESET:

- Reset preferences to Available titles only

Scenario 23

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Samsung Galaxy Tab

Open by saying: Somebody told me I could get subtitles with Hoopla, but I can't figure out how.

App on your device: Hoopla app

Where you started: I downloaded the app. I managed to check something out and even get it to play, but I'm not very good with technology.

Where you got stuck: Sometimes they talk so fast, it's hard to follow what they're saying. But I don't know how to turn on subtitles.

What you've tried so far: I came to the library. I was hoping you guys would know.

Additional Info: You're watching an English-language movie.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- Hoopla password:

Please DO NOT check anything new out to [...] in Hoopla, as [Your library] pays per checkout, and there is a limit of [#] per month.

NOTES:

Device you need: Samsung Galaxy Tab

Scenario 23 solution: The patron is looking for “subtitles,” but Hoopla uses “closed captions” and “subtitles” somewhat interchangeably. Different devices/operating systems have different methods, such as a gear icon in the upper right-hand corner while viewing a show (Android), or an icon of a tiny screen/monitor on the right-hand end of the Play/Pause scroll bar (iOS).

Where to find the information to solve the problem:

- [Hoopla help](#) > search FAQs for “closed captions”

Solutions:

- Patron needs to start the movie playing, look in the bottom right corner for a small talk bubble, and tap it. She will get a menu, with the default setting - a checkmark next to “off.” Tap “English” to enable closed captioning (with some titles, languages other than English might also be available.)
- On the Samsung, start playing a movie, look for the square with the CC in the upper right-hand corner (touch the screen to bring up controls/menus), tap the CC, toggle “Enable Closed Captions” to ON, adjust font controls as needed.

SETUP REQUIREMENTS:

- Hoopla app installed, signed in with [...] email & password
- Movie checked out to [...] card (downloading optional)

RESET:

- Verify that there is still a movie checked out, and if not, check out a new movie.
- If there is an existing movie that won't expire until after the next session, make sure the captions are turned off.

Scenario 24

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Google Nexus

Open by saying: I know how to stream Hoopla shows, but somebody said I could also download them?

App on your device: I have the Hoopla app on my Nexus, here, but I'm asking about my computer at home.

Where you started: Signed in to Hoopla. Picked out a movie and started watching, and then while the movie was playing I started clicking on things.

Where you got stuck: Nothing said "download" anywhere, and I ran out of things to click.

What you've tried so far: I tried googling Hoopla and got their help site, but I couldn't find anything there that told me how to download the movie to my computer.

Additional Info:

- You are fairly comfortable with technology
- You are using your own card to check out and watch Hoopla content
- You haven't seen any error messages

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- Hoopla password:

NOTES:

Device you need: Google Nexus

Scenario 24 solution: you can't download to a computer, just to the Hoopla app on a device.

Where to find the information to solve the problem:

- [Hoopla help](#) - "Hoopla basics" tab

Solutions: The patron can download the title to the app on his Nexus if he would like to watch that way.

SETUP REQUIREMENTS:

- Nexus set up with Hoopla app
- Check movie out to [...] account, but do not download.

RESET:

- Delete movie from Hoopla app.
- IF movie will expire before next training, check out new movie but don't download

Scenario 25

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Nook HD

Open by saying: Somebody gave me a Nook with OverDrive on it, but the app still says it belongs to my friend. I don't know how to make the app be in my name.

App on your device: OverDrive

Where you started: The OverDrive app was on it when she gave it to me and the easiest way would just be to delete the app and download it again. Normally I would. But she was telling me about some books she read recently and they sounded really good, and the thing is, she never remembers the names of the books she's read. I don't want to lose her reading history, so I can't uninstall the app, because everything she's read will be gone.

Where you got stuck: I got to this one screen that said it was authorized with her name, but when I tapped "deauthorize" it gave me this scary message about not being able to read any eBooks on the device. So I decided to not do that.

What you've tried so far: I'm afraid to try anything else, now. I don't want to make it so I can't read books on the Nook. It sort of defeats the purpose.

Additional Info:

- You have an OverDrive account email and password
- Your Nook is using the latest available version of the OverDrive app

Patron details:

- Name:
- Card:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: Nook HD

Scenario 25 solution: The OverDrive app is authorized for download when you sign in with an OverDrive account. The patron just needs to sign her friend out of the app and sign in with her own OverDrive account. OR export the reading history, then uninstall & reinstall.

Where to find the information to solve the problem:

- OverDrive Help: [What does it mean to 'authorize' the OverDrive app for Android, iOS or Windows 8?](#) (Talks about OverDrive accounts, but doesn't actually give the solution of signing out & signing back in with a different account--I can't find any mention of the fact that this keeps the reading history of the first account. Might be a glitch OD hasn't fixed!)
- OverDrive Help: [How to export your reading history in the OverDrive app](#)

Solutions:

- Create an OverDrive account (if you don't already have one) then open the app, tap the "Account" tab, then tap "sign out." Then tap "sign in" and choose the "sign in with OverDrive" option. Use your OverDrive account email and password to sign in. This will authorize the app with your own account.
- OR from your History menu, select what you want to Share, then (depending on operating system) email or save to Google Drive.

SETUP REQUIREMENTS:

- Two dummy library cards
- OverDrive accounts for both
- Nook HD with OverDrive app installed & set up with [one patron's] OD account
- Check out a few titles to [one patron], download, then return so there is something in History

RESET:

- Return any checked out items (might not be any)
- Sign out of the [2nd patron's] account and sign in with the [1st patron's] account in the OD app

Scenario 26

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: iPad

Open by saying: I accidentally downloaded Kindle format. It won't work in the OverDrive app.

App on your device: OverDrive

Where you started: I checked out a book in my app, but I wasn't really thinking, and I tapped the Read button at the top.

Where you got stuck: The button I tapped was the Kindle button! All of a sudden it's taking me to Amazon. I don't want to go to Amazon, so I hit the Back button until I got back to the Loans page in OverDrive, but it won't let me download a different format.

What you've tried so far: I came to the library. Somebody told me I would have to turn the book in and start over, but I'd rather not do that. Unless getting the right format is really complicated.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: iPad

Scenario 26 solution: The patron can install Libby or the Kindle app for iOS, or read online via browser.

Where to find the information to solve the problem:

- FAQs: [I accidentally chose Kindle \(or EPUB\) format. Can I change it?](#)
- Amazon help: ["Support for Kindle for iPhone, iPad and iPod Touch"](#) (see "Buy, download & sync.")

Solutions:

- Install Libby through iPad's App Store
- Install the Kindle app through iPad's App Store
 - Open the OverDrive app
 - Navigate to Loans shelf, tap "read with Kindle"
 - Sign into Amazon and you will be prompted to send the book to the iPad.
 - Close the OverDrive app and tap to open the Kindle app.
 - Sync the Kindle app (if it doesn't sync automatically)
- Read online via browser window
 - Go to www.fvrl.org > Books, Music, Movies & More > OverDrive
 - Sign in
 - Go to Loans page and tap "Read now in browser"

SETUP REQUIREMENTS:

- OverDrive app on iPad, signed in with [...] OD account
- Book checked out to [...] card
- Click "Read now with Kindle" to lock in the format (through the OverDrive app)

RESET:

- Uninstall Kindle app (if necessary)
- Uninstall Libby app (if necessary)
- If book will expire before next training session, return it and check out a new book through the OverDrive app, selecting Read Now with Kindle button from Loans page.

Scenario 27

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: none--you left your Kindle Fire at home

Open by saying: Is the OverDrive app going away?

App on your device: OverDrive

Where you started: I have a really old Kindle, and if I delete the OverDrive app on it I won't be able to reinstall it. There's no version of the OverDrive app for my Kindle. It's that old.

Where you got stuck: Somebody was telling me I should get the Libby app, because eventually there won't be an OverDrive app at all.

What you've tried so far: I've been very careful not to delete the OverDrive app, because checked and there's no Libby in my Kindle's app store. There really aren't very many apps left my Kindle can do. I guess eventually I'll have to get a new one, but... I mean, this one does still work.

Patron details:

- Name:
- Card #:
- PIN:
- Email address:
- OverDrive account password:

NOTES:

Device you need: none

Scenario 27 solution: The OverDrive app isn't going away.

Where to find the information to solve the problem:

- Libby Help > [FAQ](#) > "Will Libby replace the OverDrive app?"

Solutions:

- Direct the patron to Libby Help.
- Can also read online using a browser window
- Can select Kindle format and treat the Fire as an eReader

SETUP REQUIREMENTS:

- N/A

RESET:

- N/A

Scenario 28

You are acting as the patron for your partner, who will be trying to help you solve the problem as they would as a staff person. Please silently read over all the information you have, then go to the devices table and retrieve the device mentioned in the script before approaching your partner for help. Only provide information from this sheet in response to the appropriate questions asked by your partner. Don't offer additional information or make up any details not on this sheet.

Device you need: Nexus

Open by saying: My grandson really enjoys those read-along eBooks, but we can't use them in the car, because I can't figure out how to download them.

App on your device: Tumblebooks

Where you started: We know how to find them and watch them, so we got that far.

Where you got stuck: He'll be in the middle of a book when we pull out of the driveway, and then as we drive down the street, it just stops playing.

What you've tried so far: I tried going through your website & having him read in a browser window, but the same thing happened. I don't know what to try next. I'm not really good at this technology stuff.

Additional Info:

- The Nexus is wifi only - it isn't on any kind of data plan

Patron details:

- Name:
- Card #:
- PIN:
- Email address:

NOTES:

Device you need: Nexus

Scenario 28 solution: Tumblebooks requires an internet connection

Where to find the information to solve the problem:

- “How to Tumble” tab: FAQs <https://www.tumblebooklibrary.com/fags.aspx>

Solutions:

- Tumblebooks are streaming only. Try ebooks or eAudiobooks from OverDrive or RBdigital instead for car trips.

SETUP REQUIREMENTS:

- Nexus with Tumblebook app installed and signed in with [...] card

RESET:

- n/a

TRAINERS' VERSION Technology Assistance Sleuthing

This handout is for you to keep. It will also be posted on the Reference Services site on The Source.

We are going to demonstrate a couple of patron conversations. Afterward, we're going to ask you what you heard. Listen for the following:

These are the key questions for a Tech Assistance conversation that we touched on earlier--listen for different words that ask the same things

Get more information

What is your goal? What are you hoping to do?

Where did you start?

What steps did you take? What path did you follow?

Where did you get stuck? At what point did you realize you wanted help?

These are the types of issues we see patrons having most often; listen for how the patron describes the problem to help point toward a solution

Listen for clues to the problem

Account

- Using incorrect card number, PIN, username, and/or password
- Card is blocked, expired, replacement, upgrade, reciprocal, or Camas
- Vendor account needs to be updated with new card number or email
- No vendor account was created, or account was not verified
- Checkout limit reached

Missed or Mixed-up Steps

- Started from the wrong place (or not the easiest place)
- Checked out from the catalog without first setting up the app
- Looking in the wrong app for the content
- Checked out wrong content format
- Content was not or cannot be downloaded for offline use

Device

- Wifi is off, not signed in, or weak
- App is not installed, or is not set up
- App is wrong version, or doesn't work on that device

TRAINERS' VERSION Technology Assistance Sleuthing

- Title didn't completely download to device

eResource

- eResource link is not working on multiple devices or browsers
- Content in a single title is jumbled or incomplete

These are strategies for uncovering the cause of the problem--we will talk more about these after the skits; listen for what the staff person suggests

Investigate

Check the patron's WorkFlows account

Open the patron's eResource account on a staff computer

Check for wifi connection

Check Library website info about the eResource

Search Library FAQs

Search eResource help pages

Check menus, tabs, settings

Google the error message

These are tools to call on the power of the group brain

Where to get additional help

While the patron is there, ask in the Spark Help Room

If the patron needs to leave, create a LibAnswers Tech Help ticket

Technology Assistance



Solving Mysteries

Welcome!

Why are we here?

You're a natural

**Channel your inner
detective**

Should you take the case?

Listen for clues

Investigate

Try your mad sleuth skilz

Unsolved mysteries?

Technology Assistance Sleuthing

Get more information

What is your goal? What are you hoping to do?

Where did you start? What steps did you take?

Where did you get stuck? At what point did you realize you wanted help?

What possible solutions have you already tried?

Listen for clues to the problem

Account

- Using incorrect card number, PIN, username, and/or password
- Card is blocked, expired, replacement, upgrade, reciprocal, or Camas
- Vendor account needs to be updated with new card number or email
- No vendor account was created, or account was not verified
- Checkout limit reached

Missed or Mixed-up Steps

- Started from the wrong place (or not the easiest place)
- Checked out from the catalog without first setting up the app
- Looking in the wrong app for the content
- Checked out wrong content format
- Content was not or cannot be downloaded for offline use

Device

- Wifi is off, not signed in, or weak
- App is not installed, or is not set up
- App is wrong version, or doesn't work on that device
- Title didn't completely download to device

eResource

- eResource link is not working on multiple devices or browsers
- Content in a single title is jumbled or incomplete

Investigate

Check the patron's WorkFlows account

Open the patron's eResource account on a staff computer

Check for wifi connection

Check Library website info about the eResource

Search Library FAQs

Search eResource help pages

Check menus, tabs, settings

Google the error message

Where to get additional help

While the patron is there, ask in the Spark Help Room

If the patron needs to leave, create a LibAnswers Tech Help ticket

Your Name: _____

To what extent is this statement true for you?

“I feel prepared to help patrons with their technology questions.”

(Please circle a number from 0 to 5)

0 1 2 3 4 5

0="Not at all"

5="Entirely true"

Comments (optional):

SKIT 1: THERE'S A PROBLEM WITH MY CARD

Patron: It says there's a problem with my library card.

Staff: Uh-oh! How frustrating! Let's see what we can do to fix that. Can you tell me where you're seeing that message?

Patron: On my phone. I've never had any problem with eBooks before.

Staff: Do you use an app?

Patron: Yes.

Staff: Which one do you like to use?

Patron: Libby

Staff: Okay, good to know. So are you seeing that message when you use the app?

Patron: Yes. I try to place a hold, and it tells me there's a problem with my card.

Staff: Do you have the phone with you?

Patron: Yes.

Staff: Will you show me what happens?

Patron: I open the app, search for a book--in this case High Tide in Tucson by Barbara Kingsolver--and look what happens when I tap Place Hold.

Staff: Hm. Let's look up your account. Do you have your card with you?

Patron: Yeah, just a second...here it is.

[Staff enters # into WF]

Staff: Well, the good news is, your account looks clear. Let's make sure your information is current. Is this the correct address & phone number?

Patron: Yes, I updated both last week.

Staff: Great! And did you update your PIN as well, or did you keep the old one?

Patron: I updated that to match my new phone number.

Staff: Ah! I think I might know what's going on. Did you update your PIN in the Libby app when you changed your information last week?

Patron: No. Did I need to?

Staff: Let me double-check in our FAQs, but I'm pretty sure OverDrive requires your PIN match the one in your library account. ...Yes! OK, so let's figure out how to update your PIN in Libby.

Patron: Thanks!