# Surrey Libraries eBooks Handbook

# “You just need to try. You don’t need to be an expert to help.”

Help customers *as much as possible at the first interaction* - whether on the phone, at the desk or via email. With all transactions, there are some limitations (see [Appendix A](#_Appendix_A)). **All Info and YS desk staff should answer eBook questions (or try to) – this is how we learn.** [Known tech issues](#_Difficult_Questions) arise from time to time and blogs from us and Overdrive continue to be updated.

# Getting Patrons Started

Overdrive provides up-to-date device specific guides to getting started using eBooks. Print these guides on demand for patrons (for free) or email them the link – these guides are great 1st handouts for self-directed eBooks set up.

# Ebooks/Audiobooks

1. **Overdrive Help**

<http://help.overdrive.com/>

* Select *Getting Started* to find device-specific guides to getting started
* Searchable help database
* Up-to-date and maintained by Overdrive
* Download links and install instructions for the apps, ADE and Overdrive Media Console
1. **BC Libraries Coop Toolshed**

[librarytoolshed.ca](http://librarytoolshed.ca/guides?keys=&field_training_topic_value%5B%5D=eBooks&=Go)

* Contains training guides created by public libraries in Alberta
* Good beginner guides for digital resources in general and specific devices
* Creation and last updated dates are noted

# Zinio digital magazines

1. [**My SL Zinio Account handout**](http://intranet/Department/SurreyPublicLibrary/InformationServices/Information%20Online%20%20Databases%20ebooks%20etc/Database%20Guides/Public%20Database%20Guides%20and%20Handouts/Zinio/Zinio%20Accounts%20Flyer%20double%20sided%20November%202013JW%20edits.pdf)
	* Great quick handout to get started on setting up your Zinio accounts
2. **List of Zinio Titles under Surrey Libraries subscription**

[www.surreylibraries.ca/files/ZinioTitleList.pdf](http://www.surreylibraries.ca/files/ZinioTitleList.pdf)

1. **Zinio Help**

[www.rbdigital.com/help](http://www.rbdigital.com/help)

* Click on North America User Guide for Zinio’s [Zinio for Libraries](http://www.rbdigital.com/media/Zinio%20for%20Libraries%20Account%20Set%20Up%20and%20Checkout%20Guide.pdf)
* General FAQ
1. **Zinio User Guide – Surrey Libraries**

[www.surreylibraries.ca/files/Zinio\_User\_Guide\_March\_2013\_PDF.pdf](http://www.surreylibraries.ca/files/Zinio_User_Guide_March_2013_PDF.pdf)

* 8 page getting started guide, includes application interface overview & FAQ

# OneClick audiobooks

1. **Surrey Libraries OneClick User Guide** (3 pages)

[www.surreylibraries.ca/files/OneClickDigital\_Public\_User\_Guide\_PDF.pdf](http://www.surreylibraries.ca/files/OneClickDigital_Public_User_Guide_PDF.pdf)

1. **Intranet folder for** [**OneClick**](http://intranet/Department/SurreyPublicLibrary/InformationServices/Ebooks/Forms/AllItems.aspx?RootFolder=http%3a%2f%2fintranet%2fDepartment%2fSurreyPublicLibrary%2fInformationServices%2fEbooks%2fOneClick%20Digital%20Support%20Guides&FolderCTID=0x012000C0D245080C52E645BACF97606DBB47F8) **resources** (Info Services > eBooks > OneClick digital support)
2. **OneClick Help**

<http://surreylibrariesbc.oneclickdigital.com/Help/Help.aspx>

* + Has an FAQ and a number of tutorial videos
1. **OneClickdigital FAQ answers & help files**

<http://www.kslib.info/digitalbooks/oneclick/ocanswers.html>

* + Very thorough set of troubleshooting questions from Kansas State Library

# Basic Troubleshooting - Questions to Ask

The bulk of eBook questions center around the initial setup. If a customer tells you she cannot access eBooks there are some basic trouble shooting questions to be asked:

1. Do they have a Surrey library card?

A card linked from another system will not work with Surrey eLibrary.

1. Do they live in Surrey and does their Horizon record reflect this?
2. Does the stat class in their Horizon record list show Surrey?


3. When did they get their library card?

New cards are uploaded nightly so patrons need to wait a day before using some of our digital resources.

1. Have they signed up for an Adobe Digital ID?

They need this to authorize their applications. Create an Adobe ID at *adobe.com*.

1. Do they have all of the required software or applications installed?
	1. Common issues are patrons going through the website instead of the Overdrive App on their tablet or smartphone
	2. not having Adobe Digital Editions installed
	3. not having their Adobe ID authorized
2. What kind of device are they using?
	1. Some devices won’t open some file types (ie. WMA audio files on some Apple devices) and some are not compatible with our services (ie. Kindles except for the new [Kindle Fire](http://help.overdrive.com/article/2060/Getting-started-with-Kindle-Fire-devices)).
	2. Check for [device compatibility](http://www.overdrive.com/drc/) if the patron is having a hard time opening one book and not others.

# Online Resources

## General Help

1. **OverDrive Help**

<http://help.overdrive.com/>

* Best starting point for general help or if you would like to print/email something device specific for a patron
* Browse or use the search function to quickly find an appropriate help article or set of instructions to print/email
1. **Google and YouTube**
2. [**Intranet Ebooks help**](http://intranet/Department/SurreyPublicLibrary/InformationServices/Ebooks/Forms/AllItems.aspx?View=%7bDD16479E-358B-4050-8637-510F0EEB36C3%7d)
3. **Fellow info staff desk staff**. Don’t be afraid to ask your colleagues. The best way to learn is from each other!

## Device Compatibility/Purchase Suggestions

1. **Overdrive Help – Device profiles**
	* <http://help.overdrive.com/#devices>
	* Good first place to check for device compatibility and which file formats devices can handle
2. **VPL’s Choosing an Ereader Guide**

<http://guides.vpl.ca/content.php?pid=216772&sid=2326807>

* + Good overview of pros and cons between e-readers and tablets
1. **Consumer Reports**

 [www.surreylibraries.ca/research/4747.aspx](file://file-server20/userdata/Library/eBooks%20training%20materials/www.surreylibraries.ca/research/4747.aspx)

* + High quality reviews of different digital devices
1. **CNET Reviews**

<http://reviews.cnet.com/>

* + Quality reviews of different digital devices

## Difficult Questions

1. **Overdrive Digital Library Blog**

<http://overdriveblogs.com/library/>

* + Actively updated, often contains latest solutions for new bugs or issues
1. **Surrey Libraries eBooks Blog**

<http://surreyebooks.wordpress.com/>

* + Actively updated, contains tips on dealing with problematic issues and bugs
1. **Google**

<https://www.google.ca/>

* + Try googling the issue in plain language or copy and paste the error message

# eBook Experts

Issues arise from time to time that cannot be answered right away. Consult eBook experts only when you have exhausted the above.

## Before using your expert or email group

1. Verify customer is a Surrey resident with active Surrey library card.

Have a quick go through the [Basic Troubleshooting](#_Basic_Troubleshooting_-) steps on page 2.

1. Consult websites listed above under [Resources.](#_Online_Resources) If your branch “expert” will not be available within the day or is away, please email the “eBook experts” group (eBookExperts@surrey.ca)

## What to include in your email

1. Patron name, barcode and contact information
2. Your branch
3. Description of the problem
4. What you’ve already tried
5. Device make and model (i.e. Apple iPad 2, Samsung Galaxy Tab 10.1, Kobo Glo, etc.)
6. Error message if one is received
7. Title and format of the problem download (if applicable)
8. Operating System (if applicable)
9. Browser (if applicable)
10. Software application (if applicable) (Overdrive media console, etc.)

# Appendix A: Guidelines and limitations for tech questions on information desk

**We want customers to ask us for support.**

**All information desk staff should try their best to answer eBooks and eResource questions.**

* + Offer to help with extended tech questions but caution customers that it may not be possible to work through all the issues in one transaction;
	+ Get the customers started with printed/online instructions;
	+ Give further assistance, when necessary and possible;
	+ Refer customers to Technology Help drop-ins, eBooks classes, etc.;
	+ Contact and follow up on question at later time/next day, if necessary.

**We are not experts on all devices or tech problems and that’s OK.** It is good if we point this out while showing customers we want to help.

* 1. “I’m no expert at this, but I want to try to help…”
	2. “We don’t know everything, but we know how to help.”
	3. “We may not get this figured out right away, but we can follow up with you later/another time, and/or, you may attend a class or drop-in.”

**Some general guidelines**

1. **We help customers download and use our services and eResources and are knowledgeable in these resources.** The library will show people how to find/use our apps, download Library materials, and use/access our eResources.
2. **When assisting an in-depth technical question, let customers get started on their own by providing print outs of instructions to customers.** After helping on customer while desk,we may ask customers to work on the problem on their own with information we’ve provided. Customers may always come back to desk if they need further assistance.
3. **If is a question is very technical and not about basic computer/device knowledge or library products, we may refer customers (and help them find the contact information or websites) to vendors or manuals**.
4. **The library offers assistance with software necessary to use our resources, but has limits on help with commercial sites.** Setting up Adobe IDs, email addresses is something we help with on desk and in classes. The [intranet](http://intranet/Department/SurreyPublicLibrary/ecr/LearnOur%20Library%20Class%20Scripts%20and%20PowerPoint%20Pres/Forms/AllItems.aspx) has many help sheets as does the internet for these resources. For any commercial site problems/help (e.g. Amazon.ca), we will find helpful sites, phone numbers, emails and vendor/service contact information.
5. **We encourage customers to attempt their first time device set up at home.** If customers are already in the library, we can assist them with print outs of information, etc. Printingcharges may apply.
6. **We cannot accept responsibility for device technical problems.**
7. **Sometimes we cannot help phone customers with tech questions for more than a few minutes while on desk and should gather call back information at beginning of call. (see** [**phone script**](#_Appendix_B:_Phone)**)**. If someone is unable to come to the library, an info staff member can phone them back at a better time off desk.
8. **We have varying levels of technical knowledge, but we have all been trained to use our eResources**. All staff has had tablet training and be familiar with downloading/using Zinio, Overdrive and other eResources. More training on eResources may be arranged via branch managers and Jennifer W.
9. **Keep customer name, numbers, and email in a safe & confidential place for follow up.**
10. **For the security of our customers, the library does not uninstall or** **install commercial software or help enter detailed payment (credit card #s etc.) information.** Again, we can help find help contact information for vendors of these products.

# Appendix B: Phone Script

**Thank you for calling us with your call @ eReader/Tablet/eBook.**

Refer

to Technical Problems Help Sheet. Ask for email and email instructions from library information mailbox.

We are sorry, but because there are people waiting, we can’t help you on the phone at this time; we can help you at another time. Please:

1. Leave us your name and number and we will call you back when it is quieter.
2. Come to a Technology Help drop in/ book a librarian/ or eBooks class. If possible, bring your laptop or device in, especially if transferring books to an eReader.

Device Set up?

* Suggest using manual;
* give vendor a try;
* come by when set up to find out about our free eBooks, Music, Magazines and More.
* Try a class or drop-in.

Come by the library after trying to set up device at home.

**Device Technical Problem?**

**Not Busy?**

I want to *try to* help you on the phone now. Please give me your contact information before we get started in case I need to call you back.

I may have to assist people at the desk, but we will follow up with you again a bit later if I need to go (usually 5 minutes). Will that be alright?

Check library card – surrey and surrey resident.

Refer to intranet, website, or help sites of eResource.

**eResources Problem?**

**Busy?**