Sora Student Training- Demonstration Checklist Outline

This checklist provides an overview of how to use the Sora app and OverDrive's suggested order of delivery. Feel free to adapt this document and create your own outline for the training you deliver.

1. Prepare your device.
    a. Install or open the Sora app on your Android, iOS, or Windows (10+) device or use the browser option at soraapp.com.
    b. Recommended: Assign a title or titles to display on the Home tab.
        i. Optional: Watch the Assigning Titles to Students training on how to assign student titles.

2. Find your school.
    a. Search for school by name, city, or zip.
    b. Tap "I have a setup code", enter setup code, then tap Get Started.
    c. Sign in to school library using student credentials.
    d. If preferred, students may have the option to sign-in with their Facebook or OD account (only if this has been enabled by your school).
3. Begin on the **Home** tab (house icon), and review assigned title. *Note: if a student has loans, assignments, defined words, or notes/highlights, Sora will default to the Home tab. If not, it will default to the Explore tab.*

4. Tap the **Explore** tab (binoculars icon).
    a. Scroll the page to highlight collections and subjects.
    b. Scroll to the top, then tap **Collections** to see a complete list.
    c. Return to the Explore tab.
    d. Tap **Preferences** and set the following filters: Availability = Available books, Language = English. *Optional: Review additional preferences.*
        i. Tap **Apply** to set preferences and mention that these will apply to all lists throughout the app. *Optional: Note the addition of numbers next to Preferences to indicate how many have been applied.*
    e. Tap the magnifying glass to review **quick search** and **Advanced Search** options. *Optional: Note how some criteria have been determined by preferences.*
    f. Tap **Advanced Search**.
        i. Select the following search criteria: Format = Books, Subject = Fantasy.
        ii. Tap **Search** to display results.
        iii. *Optional: Make note of or demo the filtering options at the top of the page and/or the* **Refinement** *feature.*
    g. Review the title features. *Note: Keep high level.*
        i. Borrow
        ii. Read a sample
        iii. Tag
        iv. Title and author

5. **Borrow** a title (eBook or audiobook).
    a. Review reading or listening features.
        i. Define a word (eBook only).
        ii. Highlight a word or paragraph (eBook only) or a section of audio (audiobook only) and add a note.

iii. Customize reading or listening settings.

iv. Tap title to display *Time spent reading. Optional: Tap **Reveal Estimates** for additional information.*

v. Navigate to **Bookmarks** to review notes and highlights.

b. Close book to return to the search results page.

c. *Optional: Review achievement pop-up. Tap OK! to close.*

6. Navigate to the **Home** tab.
   a. View the **Loans** field located under the assigned title.
   b. Review **recently defined words** and **recent notes and highlights**.
   c. Select *See all notes and highlights* and review export options.
   d. Tap quickly on the book orb to demo how to jump back into the latest title.
   e. Close title.

7. Tap the **Shelf** tab (books icon).
   a. Note how both assigned and student selected titles display.
   b. Tap **Options** for student-borrowed title.
   c. Show ability to **Return** early, **Mark as done**, and view **Notes and highlights**.
   d. Tap the **Tag** icon and explain thumbs down/up icons.
      i. Tap the **+** sign to create a custom tag.
      ii. Type name of tag, e.g., Wishlist, then tap **Save** to add to this title.
   e. Navigate back to the Shelf and view any **Tags** and **Activity** for this title.

8. Tap the **Me** tab (smiley face icon).
   a. Choose an avatar.
   b. Note reading stats and achievements.

9. Tap the app menu (in upper right corner) to open.
   a. Tap +Add a public library and search for a local public library. *Note: Choose a library to which you already own a library card.*
      i. Note the pop-up regarding audience level content.
   b. Tap **Search for a book…** and check the *Search all of my libraries box.*
      i. Search for *The Giver*, and scroll to review how school's titles appear first.
      ii. *Note: All other functionality, e.g., preferences and refinement options, apply.*
   c. Navigate back to the Explore tab
      i. Tap the drop-down arrow at the top of the page to toggle the **Explore** tab between school and public library collection(s).
      ii. Remind audience that students will need a valid library card to borrow books from the public library, separate from their Sora login credentials.

10. Navigate back to the app menu.
    a. Review **Hold** and **Device** settings and **Download settings** if using the mobile app.
    b. Select **Help**, then review one help option.

11. Return to presentation.