

iPad Set-up Guidelines for Libraries

To ensure that your iPads work correctly for your library, it is very important that the initial set-up of the devices is done properly. We have prepared this document as a quick reference to setting up your iPads. However, if you have limited experience using or setting up an iPad, we strongly encourage you to consult the more detailed instructions and videos that we have linked to in this document.

Introduction to the iPad

For those of you who are new to an iPad or would like a quick refresher, we recommend watching the following short videos for an overview of how to get started and operate an iPad:

- [Getting Started with the iPad](#)
- [Getting to Know iOS](#)

Creating an Apple ID

- **Video Tutorial** - For an overview of how to set up your Apple ID, we recommend watching this [video](#) and then consulting the following guidelines for more detailed instructions.
- You will need to have an Apple ID in order to set up and manage your iPads, and we recommend creating an Apple ID as your first step (if you don't already have one). You will be able to manage multiple iPads using a single Apple ID.
- For information about creating and using an Apple ID, please consult the following:
 - [Apple ID FAQs](#) – Overview of Apple ID and its uses.
 - [Create Your Apple ID](#) – Form for creating an Apple ID from a Mac or PC.
- *Note: Please be very deliberate when creating an Apple ID and keep a careful record of your Apple ID information (i.e., passwords, security questions, etc.). We recommend that your Apple ID be connected to an organization email account, rather than a particular individual, in order to ensure continuity of access to the account even if there is turnover in staff. Additionally, it is possible to create an Apple ID without entering credit card information by selecting "None" when asked to enter your credit card information.
- After completing the Apple ID registration, check your email for a verification email from Apple and follow the steps to verify your email address. After you verify your email address, you can use your Apple ID to begin setting up your iPad. You will also be able to use the Apple ID to access the App Store.

Device Set-Up

- **Video Tutorial** - For an overview of how to set up your iPad, we recommend watching this [video](#) and then consulting the following guidelines for more detailed instructions.
- To make setup as smooth as possible, be sure to have an Internet connection through a Wi-Fi network available. You should also have an active Apple ID created (see above), as you will need that when setting up the iPads. You can use a single Apple ID to set up multiple iPads, and management of the devices will probably be easier if you set them all up using the same Apple ID.
- Apple Instructions – We recommend consulting the [iPad User Guide](#) when setting up your iPad for the first time. The User Guide should address every aspect of iPad set-up and use, but it is very detailed and may contain information that is unnecessary for your library. The following sections of the User Guide address initial set-up of the device:
 - [Turn on and set up iPad](#) – Basic steps for getting started.
 - [Connect iPad to the Internet](#) – Instructions for connecting to a Wi-Fi network. (Please note: these iPads are not configured to connect directly to a cellular network.)
 - [Manage Apple ID and iCloud Settings](#) – Instructions for managing Apple IDs and iCloud settings.
 - [Wake and Unlock iPad](#) – Explains different methods for unlocking the iPad, such as using a passcode.
 - *Note: Your library may want to consider setting up your iPads so that they do not lock and do not require a passcode or other method to unlock. This will make it easier for patrons to access the device. If you do set a passcode on the iPad, we recommend setting a very simple passcode that will be easy for staff and patrons to remember, such as “12345”.

iPad Management

Answers to most of your iPad questions can be found in the [iPad User Guide](#), which provides detailed instructions on many aspects of using your iPad. At a minimum, we recommend that libraries consult the following sections of the User Guide for important guidance on how to manage and operate the devices in a library setting:

- [Settings](#) – This section of the User Guide will get you started in Settings. Scroll through the following sections of the guide to learn how to do things like adjust screen brightness, change the name of your iPad, set the date and time, etc.
- [Backing Up Your iPad](#) – Follow these instructions to back up your iPad using iCloud, a Mac, or a PC. We strongly recommend frequently backing up your iPad to prevent loss of apps, data, and settings.
- [Restoring Content from a Backup](#) – Follow these instructions to restore iPad content from a backup.

- [Accessibility](#) – This section of the User Guide provides a starting point for using the iPad’s accessibility features. Scrolling through the following sections of the guide provides more detailed instructions on accessibility.
- [Setting Restrictions](#) – This link will take you to instructions for setting various restrictions on your iPads. The page is geared towards setting parental controls, but libraries will probably find it useful for preventing unauthorized iTunes and App Store purchases, preventing explicit content, and so forth.

Apple Business Manager (ABM)

Apple Business Manager can be used by your library to register ownership of the iPads you have received. After enrolling, you can register iPads (and other Apple products) in ABM by entering the device serial numbers. You will then be able to log in to ABM and view a list of all Apple products owned by your organization. Apple Business Manager can also be used in conjunction with Mobile Device Management software to manage your iPads remotely and maintain a greater degree of control over them. Please consult the following resources for an overview of Apple Business Manager and instructions on how to enroll:

- [Overview of Apple Business Manager](#)
- Enrollment Prerequisites (You will need to have the Reseller ID for our iPad vendor, CDW-G. The ID is: **1C71B60**):
 - [Program Requirements](#)
 - [Device Eligibility](#)
- [Enroll in Apple Business Manager](#) – Explains the steps for enrolling your library in Apple Business Manager.

Mobile Device Management (MDM)

Apple Business Manager on its own does not allow for supervised management of iPads or other Apple products. If your library would like to have the ability to manage your iPads remotely, we suggest a Mobile Device Management solution for your iPads. An MDM will allow you to do things like make changes to all devices simultaneously, run updates, distribute apps to all devices, and lock a lost or overdue device. An MDM will also allow you to place higher levels of restrictions on your devices.

A quick internet search can find several Apple MDM options that are available at relatively low cost or even no cost depending on the number of devices you intend to manage. Your router might also have software that can manage mobile devices. Check with your local IT support person to see if this is an option for you.

Some Apps to Get You Started with iPad

Productivity apps

- iWork - includes Pages, Numbers, and Keynote - Apple's version of Office

- Google Docs, Sheets, Slides, Drive - Google's cloud office apps. Can be useful for people used to using Chromebooks or Google products. Users must use their own Google accounts, and their account info must be cleared after use.

Meeting apps

- Zoom
- Google Duo
- WebEx
- GoToMeeting

Library apps

- Libby - allows users to read and listen to library e-books and audiobooks.
- Include any others for which library has subscription, e.g., Freeding, RBDigital, Mango, etc.

Entertainment

- YouTube
- TED
- You can decide whether or not to include popular streaming services like Hulu, Netflix, etc.

News

- If your library subscribes to any online newspapers, include those apps. You can also customize the Apple News app with Channels and Topics you know are of interest to members of your community.

With iPadOS 14, which just came out this month, you have widgets. We suggest setting up widgets for weather and news and a calendar of upcoming library/local events.

There are so many possibilities for apps. Keep in mind that the storage on these devices is limited, so you might want to limit the apps to just the most popular and useful. TechRadar just came out with an extensive list: "Best free iPad apps 2020: the top titles we've tried: The best free apps for the iPad, iPad Air and the iPad mini," by Craig Grannell (<https://www.techradar.com/news/best-free-ipad-apps>).

And don't be afraid to ask for recommendations from patrons and other librarians.

Technical Support and Troubleshooting

For assistance with set-up, operation, or troubleshooting, we encourage you to contact Apple Support's Business and Education line at **866-752-7753** and **select Option 3 twice**.

For additional support, you may also contact Suzanne Reymer at the Montana State Library:

- Suzanne Reymer, sreymer2@mt.gov, 406-698-0503
- John Kilgour, jkilgour@mt.gov, 406-444-4128