

OverDrive Configuration

This document outlines the steps for integrating OverDrive with your Oliver v5 system.

Initial Setup

- 1. Ensure you have the SIP2 module and that your SIP2 registration has been updated in Oliver
- Check with your IT staff and make sure that port 6001 (used for SIP2 authentication) is open for inbound access to your Oliver application server. The details of what IP addresses that this needs to be opened to are available in the "Softlink LMS Settings" form sent to you by OverDrive.
- 3. Create a new user in Oliver (under Circulation | Borrowers) with a username/password of SIP2/SIP2. This user should have a user role that has access to SIP2.

SIP2 Parameters

There are two parameters (Management | Parameters) that should be set in your Oliver site which will allow additional functionality for OverDrive.

- a. The OverDrive Branch Code field (Parameter 7013) allows you to get statistics by branch.
- b. The OverDrive Patron Type field (Parameter 7014) is used to limit access on resources for certain borrowers. This is best set to Scholastic Year. (e.g. if you wish to allow borrowers in particular years not to have access to particular items)

7013	OverDrive Branch Code field	Branch
7014	OverDrive Patron Type field	Scholastic Year

OverDrive Details

OverDrive requires the details of your Oliver system for authentication setup. On the "**Softlink LMS Settings"** form, you will need to enter the following information in relation to your Oliver system:

SIP2 Server Details:

Server Address: (External IP Address of your Oliver server) Port: 6001

Server Authentication (This should include details of the user configured in the Initial setup) Alias: SIP2 Password: SIP2 Location/School Code: (This will be in your Oliver installation email. The default value is default_corp)

Library Card/User Alias Format: If your borrower aliases follow a particular format enter this here otherwise leave blank

User PIN/Password:

Specify if you want your users to use their Oliver password to access overdrive or just their alias/username?

Sample Cards: Enter some sample Oliver aliases here.

Support Email Address: Enter the email address of the library.

Main Library Site URL:

Enter the URL to your Oliver site (if it is available outside your school network).

OverDrive CSV Import

When you purchase new records from OverDrive, you will be provided with an excel file. In order to import this into Oliver, you will need to save this as a CSV file before importing.

1. Save the file provided from OverDrive and open using Excel:



2. In Excel, choose Save as and select the type as CSV (Comma Delimted).

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- 3. Give the file the name specified in the Oliver import (e.g. NewRecords.csv)
- 4. Open Oliver and navigate to Management | Import
- 5. Choose CSV and click Go
- 6. From the CSV template option choose Overdrive
- 7. Set tags as required and leave the processing as default
- 8. For Overwrite Matching select "Match on Title, Edition, GMD, Author and Publisher"
- 9. Click Import to start the import process.

Import a CSV file									
Recurrence:	Run once Select whether this import will run once or will recur periodically.								
Filename:	Choose File Overdrive_PSample.csv Enter or browse the full path and name of the CSV file you wish to import.								
File encoding:	UTF-8 The encoding used for the CSV file. If unsure use UTF-8.								
CSV template:	OverDrive - Catalogue Default Tags Select the CSV template which defines the order in which the fields will appear.								
Processing:	New:	Ignore							
		Add							
		Assume all new							
		Tag:	OverDrive 15/03/2013						
	Existing:	◎ Ignore							
		Replace existing							
		Inhance existing							
		Tag:	OverDrive updated 15/03/2013						
	Select the manner in which records which	already exist in the system should be handled. Enter a tag for new and / or mod							
Notification:	Create an email or SMS for notifying when the import has completed.								
Overwrite Matching:	Match on Title, Edition, GMD, Author and Publisher								
	Select the type of matching to be performed to determine how duplicate records should be selected for overwriting.								

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