

## 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
2. 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 <input type="text"/>
7014	OverDrive Patron Type field	Scholastic Year <input type="text"/>

### 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?



Import a CSV file														
Recurrence:	<input type="text" value="Run once"/> Select whether this import will run once or will recur periodically.													
Filename:	<input type="button" value="Choose File"/> Overdrive_P...Sample.csv Enter or browse the full path and name of the CSV file you wish to import.													
File encoding:	<input type="text" value="UTF-8"/> The encoding used for the CSV file. If unsure use UTF-8.													
CSV template:	<input type="text" value="OverDrive - Catalogue"/> <b>Default Tags</b> Select the CSV template which defines the order in which the fields will appear.													
Processing:	<table border="1"> <tr> <td rowspan="2">New:</td> <td><input type="radio"/> Ignore</td> </tr> <tr> <td><input checked="" type="radio"/> Add</td> </tr> <tr> <td></td> <td><input type="radio"/> Assume all new</td> </tr> <tr> <td></td> <td>Tag: <input type="text" value="OverDrive 15/03/2013"/></td> </tr> <tr> <td rowspan="3">Existing:</td> <td><input type="radio"/> Ignore</td> </tr> <tr> <td><input type="radio"/> Replace existing</td> </tr> <tr> <td><input checked="" type="radio"/> Enhance existing</td> </tr> <tr> <td></td> <td>Tag: <input type="text" value="OverDrive updated 15/03/2013"/></td> </tr> </table> Select the manner in which records which already exist in the system should be handled. Enter a tag for new and / or mod	New:	<input type="radio"/> Ignore	<input checked="" type="radio"/> Add		<input type="radio"/> Assume all new		Tag: <input type="text" value="OverDrive 15/03/2013"/>	Existing:	<input type="radio"/> Ignore	<input type="radio"/> Replace existing	<input checked="" type="radio"/> Enhance existing		Tag: <input type="text" value="OverDrive updated 15/03/2013"/>
New:	<input type="radio"/> Ignore													
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Existing:	<input type="radio"/> Ignore													
	<input type="radio"/> Replace existing													
	<input checked="" type="radio"/> Enhance existing													
	Tag: <input type="text" value="OverDrive updated 15/03/2013"/>													
Notification:	<input checked="" type="checkbox"/> Create an email or SMS for notifying when the import has completed.													
Overwrite Matching:	<input type="text" value="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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