

OverDrive Library Card Manager Overview

What is Library Card Manager?

Library Card Manager is an OverDrive-hosted portal that enables remote authentication for users. Your library can upload library card numbers (or a similar unique login, such as username or email address) by batch upload or card-by-card. Once a library card number is added via the portal, a user can check out digital titles using their card number.

Requirements

A library card (or similar) is the only required data to upload to Library Card Manager. As part of the sign in process, your library can choose to require users to enter an additional field such as PIN, last name, date of birth, password, etc. Additionally, you can include a status (e.g., expired card, fines) when adding users. Keep in mind that by not uploading a library card results in denied access.

Upload options

1. Batch upload

The most efficient way to add library cards is via the batch upload process. The portal requires that the file used is .CSV format (the Help pages within the portal detail how to convert an Excel spreadsheet to a .CSV file). The file can either be multiple columns or comma delimited. See examples below.

| | A | B | C | D |
|---|-------|----------|---|---|
| 1 | 11111 | password | | |
| 2 | 11112 | password | | |
| 3 | 11113 | password | | |
| 4 | 11114 | password | | |
| 5 | 11115 | password | | |
| 6 | 11116 | password | | |
| 7 | 11117 | password | | |
| 8 | 11118 | password | | |

| | A | B | C | D |
|---|----------------|---|---|---|
| 1 | 11111,password | | | |
| 2 | 11112,password | | | |
| 3 | 11113,password | | | |
| 4 | 11114,password | | | |
| 5 | 11115,password | | | |
| 6 | 11116,password | | | |
| 7 | 11117,password | | | |
| 8 | 11118,password | | | |

2. Individual upload

If you are not able to create a list of cards to be added via batch file, library card numbers can be added individually as well. Your library can simply login to Library Card Manager and select Library Cards > Add Card.

The screenshot shows the OverDrive Library Card Manager interface. The navigation bar includes 'Home', 'Library Systems', 'Library Accounts', 'Library Cards', 'Library Users', and 'Help'. Below the navigation bar, there are links for 'Back to List', 'Upload Cards', and 'Search'. The main heading is 'Add Library Card to Baker Free Library'. The form contains two fields: 'Card Number*' with a text input box and a note below it stating 'Card numbers must consist of numbers and/or letters, and be 5-50 characters long.'; and 'Card Status*' with a dropdown menu currently set to 'Valid'.

Maintenance

Card numbers in Library Card Manager are static. Therefore, as new cards are issued or card statuses change, your library will need to add or remove them as appropriate. The simplest way to do this is to upload a new batch file with current information and overwrite the previous data. If your library allows users to change PINs directly, it is recommended to use last name or date of birth as a PIN requirement for stability.

