

Configure Overdrive Access

Purpose

This document is to help you connect your library's Overdrive collection to your Library Simplified Circulation Manager service. Overdrive provides a [glossar](#) that explains most of the terminology.

Types of Overdrive Collections

Some libraries only have access to one Overdrive collection, the one they've acquired using local resources. For purposes of this configuration document we will refer to this as a simple Overdrive collection. However, some libraries also participate in a consortium that gives them access to a larger collection, with their individual library collection being an *Overdrive Advantage* collection of separate titles. We'll refer to this set of collections as a *tiered Overdrive* collection, with a parent collection and a child collection. In this case, your library's Advantage Collection is a *child* of the consortium collection (the parent). In order to configure tiered Overdrive collections, you (or your SimplyE hosting provider) will need account credentials for **both** the consortium's Overdrive collection and your library's Overdrive Advantage collection. You may need to contact the consortium's support staff to obtain their credentials.

If your library has only a simple Overdrive collection, you need to complete **only** the steps for "Configuring the Parent Overdrive Collection," using the Overdrive access credentials you obtain for your library as shown below.

For a tiered collection, you should complete the *Parent* section for the primary Overdrive account, the consortium account, with the credentials supplied by consortium staff. Afterwards, you should complete the "Configuring the Child Overdrive Collection," your Advantage collection, using your library's access credentials.

Obtaining Access Credentials

The following steps will help you complete the application to obtain Overdrive API credentials for your library collection. As a precaution, you may wish to whitelist the email addresses associated with the application process so the response emails don't get caught by your spam protection software. At the least, you should whitelist the following two specific addresses:

apisupport@overdrive.com
support@overdrive.com

1. To start connecting your library's Overdrive account to your Library Simplified circulation manager, go to the [Member Center](#) and apply for API access. You will need to create an Overdrive developer account to obtain credentials required in connecting the Circulation Manager to your Overdrive account.

Apply for Access Early!



It can take a week or more to get approved for API access, so don't put this off!

HOME DOCS APIS SUPPORT MEMBER CENTER APPLY NOW

OverDrive
DEVELOPERS

Sign In

Home

Member Center

As a registered OverDrive developer partner, you will be granted access to the OverDrive APIs relevant to your project. Registered developers can use the member center to find library account IDs or access retail account IDs, which function as the starting point for all OverDrive APIs.

- [Apply for API access or request new APIs for your client](#)
- [Change Password](#)
- [Reset Client Secret](#)
- [Find Library Accounts](#)

In the future, you will be able to manage multiple developer accounts for separate projects and sign up for new APIs as they become available. Check back soon!

2. Click the **Apply** link to start the application.
3. Complete the *Developer Application* form as shown below

a. For the "Are you requesting a new API client" dropdown, select the **Existing Client** option.

OverDrive DEVELOPERS

Developer Home > Application

Developer Application

Apply to become an OverDrive developer by completing the form below. Be sure to describe your organization and the scope of your development project in full detail.

We will review applications on a weekly basis. Approval will be based on the applicant having an existing customer relationship with OverDrive, or applying as a third-party developer agent for an OverDrive customer. For a third party to be approved, the application must disclose the nature of the project and identify the specific OverDrive accounts for which it will utilize the OverDrive APIs. All projects will be reviewed to confirm that they are within the scope and permitted use for OverDrive APIs. Prior to gaining access to OverDrive APIs, all applicants will be required to accept the [Terms and Conditions](#).

Be sure you receive emails from OverDrive during the application process by whitelisting our domain. [Learn how](#).

Are you requesting a new API client, or new access for an existing API client? *

Existing Client
-- Please Select --
New Client
Existing Client

b. Enter your name and your email address into the **Contact Name** and **Contact Email Address** fields.

c. If you know your library's Overdrive identifier, you can enter it in the **API Client Key** field. If you don't, you can enter your library's city and state. The API Client Key should be provided to you in your response from Overdrive for developer access.

d. Be sure to select **both** the **Discovery** and the **Circulation** options in the **API Access Requested** field.

Are you requesting a new API client, or new access for an existing API client? *

Existing Client

Contact Name: *

Contact Email Address: *

API Client Key: *

API Access Requested: *

- Discovery
 Circulation

Planned API Usage: *

Include list of associated school or library accounts

I confirm that I have the legal authority to accept and bind my organization to the API Terms and Conditions, and on behalf of the organization accept and agree to the [OverDrive API Terms and Conditions](#).

Overdrive API Types



Overdrive distinguishes between *Discovery* and *Circulation* APIs. Library Simplified needs access to both, to keep track of the items in your collection as well as to conduct circulation transactions on behalf of your patrons.

From the glossary:

Discovery APIs:
Discovery APIs are designed to allow your users to browse and explore OverDrive digital collections. You can search for titles, check availability, and get details on specific titles.

Circulation APIs:
These APIs are designed to allow you to circulate content from an OverDrive digital collection. You can borrow and place holds on titles, see what a specific user has borrowed or placed on hold, and get download links for content that a user has borrowed.

e. Copy the following block of information in the **Planned API Usage** field. It is important to request all three authentication types (see the *NOTES* section below). Be sure to edit your library's name; the remainder of the items should remain as is:

Library: Your Library Name
Project: Integration with SimplyE, in partnership with NYPL
Environment: Production (not testing)
Authentication Types Required:
- Client authentication
- Patron authentication
- Granted authentication

f. Click the **Confirm Conditions** checkbox.

g. Click the "*I am not a robot*" checkbox.

h. Once you've reviewed the form, click the **Submit** button to complete the registration

I confirm that I have the legal authority to accept and bind my organization to the [API Terms and Conditions](#), and on behalf of the organization accept and agree to the [OverDrive API Terms and Conditions](#). *

Validate your response here:

 I'm not a robot 
reCAPTCHA
Privacy - Terms

Submit

4. Wait for Overdrive to send you an email with production IDs needed to configure your Circulation Manager Overdrive Collection. You will receive an email response (to the address you provided above) almost immediately upon submitting your application, which is just a confirmation Overdrive received your request. In about 24 hours so (perhaps longer depending on circumstances) you should receive an email with your library's API credentials. The credentials will include the following data points:

Library ID
Website ID
Client Secret
Library ILS name
OverDrive digital collection URL

If you did not know your exact **API Client Key** to enter into the application form above, and you don't see it in the response, reply to the support address and request the API Client Key as well.

Sandbox vs Production IDs



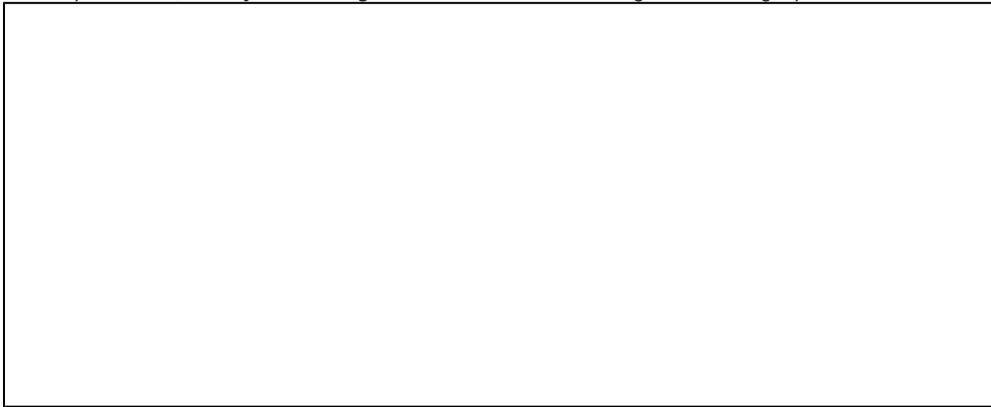
When Overdrive sends your API credentials email, you may accidentally receive a website ID of 100300 and a library ID of 4425. Those are the IDs for the Overdrive test library. If this happens to you, reply to the email and tell them that you need the production IDs to integrate your library into the SimplyE system.

Configuring the Parent/Main Overdrive Collection

Once you have obtained either the API credentials for your library's Overdrive collection (a single Overdrive collection), or the consortium's API credentials for the main consortium collection (in a tiered Overdrive configuration), you can proceed to configure the Overdrive collection in the SimplyE Circulation Manager.

1. Open a web browser and enter the URL to your Circulation Manager's Admin interface: for example, <https://simplye.libraryname-state.org/admin>

- In the top menu bar, click **System Configuration** to enter into the Configuration Manager portion of the Admin interface.



- Click the **Collections** item from the left menu.
 - Click **Create a new collection**
-
- Select the **Overdrive** item from the **Protocol** drop down field.
-
- Fill in the configuration form:
 - Under **Name**, enter a descriptive phrase for the collection: for example, *XYZ Consortium Overdrive*
 - Skip the **Parent** field if it is displayed
Note: If this is the first Overdrive collection you have created in the Circulation Manager, the Parent field is not present.
 - Under **Library ID**, enter the corresponding ID from your credentials email provided by Overdrive
Note: If Overdrive's library ID starts with a zero, you'll probably have better results if you omit the zero.
 - Under **Website ID**, enter the corresponding ID from your credentials email provided by Overdrive
 - Under **Client Key**, enter the key provided by Overdrive
 - Under **Client Secret**, enter string provided by Overdrive

Collection configuration

Create a new collection

Name

Protocol

Integrate an Overdrive collection. For an Overdrive Advantage collection, select the consortium's Overdrive collection as the parent.

Parent

Library ID

Website ID

Client Key

Client Secret

Libraries

Add Library

- Select the appropriate library record from the **Add Library** drop down list
- In the library sub-form which displays, in the **ILS Name** field, enter the Library ILS name string provided by Overdrive

- i. Also in the library sub-form, in the **Default Loan Period** field, enter the length of the library's ebook loans

Add Library

ABC Demo Library ▼

ILS Name

When multiple libraries share an Overdrive account, Overdrive uses a setting called 'ILS Name' to determine which ILS to check when validating a given patron.

Default Loan Period (in Days) (optional)

Until it hears otherwise from the distributor, this server will assume that any given loan for this library from this collection will last this number of days. This number is usually a negotiated value between the library and the distributor. This only affects estimates—it cannot affect the actual length of loans.

Add Library

Submit

- j. When you have finished the library sub-form, click the **Add Library** button to enable titles from this collection to be displayed in the library's SimplyE browse feeds
- k. When you have reviewed the form and are ready, click the **Submit** button to create the Overdrive collection. If the Circulation Manager management scripts are all running, an ingest process for existing title metadata from Overdrive will begin within the hour.

If your Overdrive collection is a single, standalone collection, this completes your Overdrive configuration. If you were configuring the consortium collection which serves as a base for a library's subsidiary Overdrive Advantage collection, begin configuring that Advantage collection in the next section.

Configuring a Child/Advantage Overdrive Collection

When your library is part of a consortium that has a primary, overarching collection, but your library has a separate Overdrive Advantage collection, you need to configure the Advantage collection and associate it with the primary collection.

The script `bin/informational/overdrive-advantage-list` will query Overdrive to learn about all Overdrive Advantage collections associated with a primary Overdrive collection. In particular, it will list the names and library IDs of all libraries with an Overdrive Advantage collection associated with a primary collection. This is a useful script to run when setting up Overdrive Advantage accounts, because it can save some back-and-forth emailing with Overdrive.

To configure the Advantage collection:

1. Login to the Circulation Manager Admin interface
2. Click the **System Configuration** top menu item
3. Click the **Collections** item on the left sidebar
4. Click the **Create a new collection** item
5. Select **Overdrive** from the **Protocol** dropdown list
6. In this case, we need to link the new collection to a parent collection; select the appropriate parent collection from the Parent dropdown list

Collection configuration

Create a new collection

Name

Protocol

Overdrive ▼

Integrate an Overdrive collection. For an Overdrive Advantage collection, select the consortium's Overdrive collection as the parent.

Parent

Test Consortium One ▼

Library ID

Libraries

Add Library

Select a library ▼

Submit

Notice that selecting the parent collection removes several of the configuration options. This child collection will use the corresponding values from the parent collection.

7. Under **Library ID**, enter the corresponding ID from your credentials email provided by Overdrive (or obtained through the `bin/informational/overdrive-advantage-list` script)
8. Select the desired library record from the **Add Library** drop down list
9. In the library sub-form which displays, in the **ILS Name** field, enter the Library ILS name string provided by Overdrive

10. Also in the library sub-form, in the **Default Loan Period** field, enter the length of the library's ebook loans

Add Library

ABC Demo Library

ILS Name

When multiple libraries share an Overdrive account, Overdrive uses a setting called 'ILS Name' to determine which ILS to check when validating a given patron.

Default Loan Period (in Days) (optional)

21

Until it hears otherwise from the distributor, this server will assume that any given loan for this library from this collection will last this number of days. This number is usually a negotiated value between the library and the distributor. This only affects estimates—it cannot affect the actual length of loans.

Add Library

Submit

11. When you have finished the library sub-form, click the **Add Library** button to enable titles from this collection to be displayed in the library's SimplyE browse feeds

12. When you have reviewed the form and are ready, click the **Submit** button to create the Overdrive collection. If the Circulation Manager management scripts are all running, an ingest process for existing title metadata from Overdrive will begin within the hour.

NOTES

The Three Types of Overdrive Authentication

When the Library Simplified Circulation Manager makes a call to the Overdrive API, Overdrive needs to verify that the Circulation Manager is authorized to act on behalf of your library. If the Circulation Manager is acting on behalf of a specific patron (e.g. creating a loan), Overdrive also needs to know that the Circulation Manager is authorized to act on behalf of that patron.

Overdrive offers three types of authentication:

1. **Client authentication** verifies that the Circulation Manager is authorized to act on behalf of the library. It's used by scripts that run in the background to maintain an accurate picture of your library's Overdrive collection.
2. **Patron authentication** and
3. **Granted authentication**

Each authentication type provides the Circulation Manager with an access token. In all cases, the token is only good for an hour, after which a new token will be requested.

Client Authentication

Client authentication is pretty simple. Overdrive issues you a set of credentials: a client key and a client secret. At any time, you can show those credentials to Overdrive to get an access token. Although this is the simplest way to get an access token, the token is not authorized to act on behalf of a specific patron. You can look at the collection but you can't borrow books.

Patron Authentication

Patron authentication is the simplest way of getting an access token to act on behalf of a patron. It can only be used when your library does authentication by username and password (or equivalent pieces of information, such as barcode and PIN).

To get an access token with patron authentication, you provide your client key and client secret (as with client authentication), but you also provide the patron's username and password.

Overdrive checks the patron's username and password with your ILS. If the ILS says the username and password are valid, you get an access token.

This access token can act on behalf of the patron whose username it was associated with. You can borrow books, place holds, etc.

Granted Authentication

Granted authentication is a more complex way of getting an access token to act on behalf of a patron.

When you set up granted authentication with Overdrive, you'll be asked to set up a "redirect URI". (You can change your redirect URI [here](#).) Your redirect URI should point to the `oauth_callback` controller of your circulation manager, e.g.:

```
https://my-circulation-manager.com/oauth_callback?provider=Overdrive
```

When a patron tries to check out a book through Overdrive, Library Simplified circulation manager will tell them to visit a URL based on this template:

```
https://oauth.overdrive.com/auth?client_id={ID}&redirect_uri={URLredirectedTo}&scope=accountId:{ID}
&response_type=code&state={optionalStateParameter}
```

Overdrive will redirect the patron to... some URL somewhere. It's unclear yet if it's a URL on your ILS or one managed by Overdrive. Either way, the patron will be asked to log in. Once they log in they will be asked to authorize Library Simplified to act on their behalf. Once they allow this, Overdrive will send them to your redirect URI:

```
https://my-circulation-manager.com/oauth_callback?provider=Overdrive&state={optionalStateParameter}&code=
{authorizationCode}
```

The circulation manager can then use the {authorizationCode} to get an access token to act on behalf of the patron.

Related articles

- [Configure Biblioboard Access](#)
- [Configuring a Biblionix SIP2 Patron Authentication Integration](#)
- [Adding a new custom dimension to a Google Analytics integration](#)
- [Configure a Google Analytics Integration](#)
- [Upgrading the Elasticsearch Search Engine](#)