

To Add New Patrons to Overdrive

Instructions for creating the CSV file

If you are creating a spreadsheet from scratch:

Note: Do not include any additional information in your spreadsheet beyond what's listed below.

1. The first row should include **column headers** that will be used when importing the information into Overdrive's Library Card Manager. See image below for examples of types of data that can be used in the various columns.

Sample spreadsheet of types of information that can be used in columns:

	A	B	C	D	E
1	"Library Card"	"PINs"	"Card Status"	"Branch Code"	"Patron Type"
2			0	SLS	0
3			0	BHS	0
4			0	CHHS	0
5			0	MGEL	1
				WGMS	2
				LT	1

any alpha numeric value

any alpha numeric value

2. Enter library card number in the first column (**this is the User ID**)
 - Enter one library card per line. It does NOT have to be a number.
3. Enter PINs in the second column (**this is the Password**)
 - This can be anything 4 characters or more
3. Enter card statuses in the third column
 - Use (zero) 0 = Valid Status
4. Enter branch code in the fourth column
 - This is **your** "SchoolCode" that you are used to using. (BMC, CHHS, MGEL etc.)
5. Enter patron type in the fifth column


"Library Card" is used here


"PIN" is used here

- Use the following codes: **0**=(**HS & MS & ES** /adult /), **1**=(**ES** /juvenile), or **2**=(**MS & ES** /young adult).
 - **NOTE:** If column is left blank for a user, they will be identified as adult.
6. Save your spreadsheet in a CSV format

Uploading CSV file to OverDrive

- Log in to “[Library Card Manager](#)” - Contact Andrea or Allie to see if you need an account created. If you already have one, and don’t remember your password, just click “forgot password” and you will be brought through the process.
- Choose desired school from the drop down menu.
- Select “Upload files”





User Login Manager

Language ▾ Help azeppetello@ocmboces.org  ▾

Secure your admin account with two-step verification. Turn on Remind me later


AVAILABLE ACCOUNTS

Baldwinsville Central School District ▾





FILTERS

User status ▾ Access level ▾ Branch code ▾ Clear all filters

 Search users

Showing 1 to 10 of 6,979 entries

SHOW 10 ▾ ENTRIES

↓ User ID	Branch code	Access level	User status	Last login attempt	Actions
	BHS	Adult	Valid		  

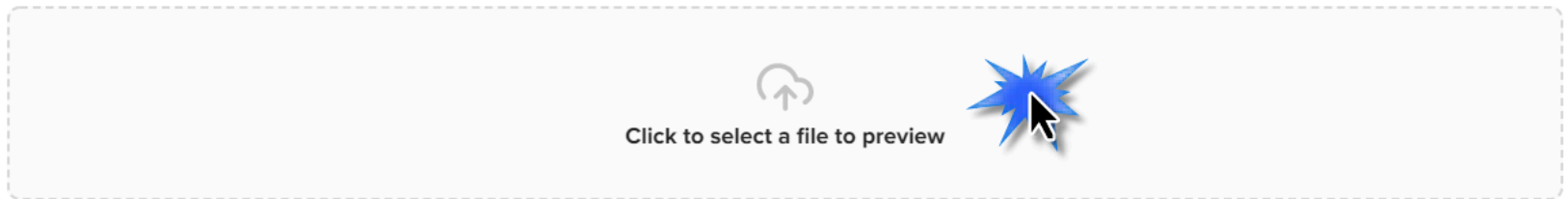
- Click inside the box to be able to select the file to upload

Upload file

STEP 1: Select your file

We recommend uploading a CSV or TXT file, but you can choose any text file type that uses commas, pipes, or tabs to separate data.

Please note that XLSX, XLS, and DOC files can't be uploaded to ULM.



FORMATTING OPTIONS

Data is separated by

Commas ▼

File uses column headers

☐

Treat quotes as normal text

☐

- Depending on where your information starts, choose “File uses column headers”

- After you have selected a file you will be able to see a preview of the data, all the way at the bottom of the preview there is a box to click to upload, DO NOT click delete all users and replace with this file. That is for a clean upload of the entire district.

T0010915

T0012049

Delete all users and replace with this file ☐

Upload

If you only need to add one or two accounts, you can do so one at a time. The procedure is very similar. Instead of choosing “upload cards” you will choose “add caMarty Vainder

Marty@chaptersgroup

(516) 541-2750rd”

Add the same information you would have put into the CSV file, and click “Manage users” then select add user from the