Find information about how to use a third party system for patron authentication in Relais D2D. When an institution wants to use their organization's single sign on system to authenticate patrons, the institution must configure and implement the following:

- Display a login page to allow patrons to enter their locally assigned credentials.
- Perform a lookup against the third party system and generate a URL or call the Relais Authentication service to generate an aid.

### Generate a URL

The URL can include any of the following tags:

Note: The values for the PI, PS, UL and RK tags can be encrypted. See [Security options for sending patron credentials](https://help.oclc.org/Resource_Sharing/Relais_D2D/Authentication/Patron_authentication_using_a_third_party_sy...) for additional details.

<table>
<thead>
<tr>
<th>TAG</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>Patron ID</td>
</tr>
<tr>
<td>PS</td>
<td>Patron surname</td>
</tr>
</tbody>
</table>
| User Login | User Login  
  • As defined in the patron record in Relais. |
| User Password | User Password  
  • As defined in the patron record in Relais. |
| RK  | Record key  
  • The patron's internal record key in your library system. |
| PL  | Preferred Language |
The tags you **are required to** include in the URL depend on which option Relais is using to retrieve patron information.

1. **Option 1. Using NCIP Lookup User to your local library system.**
   - If using NCIP, the credentials provided in the URL must be able to be used in the [Lookup User message](https://help.oclc.org/Resource_Sharing/Relais_D2D/Authentication/Patron_authentication_using_a_third_party_sy...) to be sent to the local library system.
   - The value in the PI tag **must** be the same patron ID as it is in your library system.

2. **Option 2. Using a Relais patron record that was pre-loaded**

### Using the URL to retrieve patron information

Depending on which option is used, Relais will retrieve patron information in the following way.

**Option 1: Using NCIP**

- Uses the values from the xxx tags to generate an NCIP Lookup User message and sends it to the local library system to retrieve current patron information.
- Once the Lookup User response is received then the values are used to determine whether a patron exists for this library.
  - If **yes**, the values in the skeletal patron record in Relais are updated if appropriate.
  - If **no**, a Relais patron record is created using the values as described in [NCIP generated patron records](https://help.oclc.org/Resource_Sharing/Relais_D2D/Authentication/Patron_authentication_using_a_third_party_sy...).

**Option 2: Using a Relais patron record**

- Validates that the LS tag (Library Symbol) value is registered in Relais. If this look up fails an error message is returned.
- Uses the value for the RK tag to determine whether a patron record exists for this library symbol.
  - If **yes**, the value from the PI tag is compared with the value for the alternate patron ID in the record.
    - If the values are different, the patron record is updated.
  - If **no**, a Relais patron record is created with the following values:

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**TAG** | **DESCRIPTION**
--- | ---
LS | Library symbol
  - As defined for your library in Relais.
  Caution: Library symbol must be included.
<table>
<thead>
<tr>
<th>RELAIS FIELD</th>
<th>RELAIS DATABASE FIELD</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron ID</td>
<td>PATRON_ID</td>
<td>RK tag value</td>
</tr>
<tr>
<td>Library Symbol</td>
<td>LIBRARY_ID</td>
<td>Library ID associated with the LS tag</td>
</tr>
<tr>
<td>Alternate Patron ID</td>
<td>ALT_PATRON_ID</td>
<td>PI tag value</td>
</tr>
<tr>
<td>Patron Active flag</td>
<td>PATRON_ACTIVE</td>
<td>&quot;Y&quot;</td>
</tr>
<tr>
<td>Date record entered</td>
<td>DATE_ENTERED</td>
<td>Current system Date and Time</td>
</tr>
<tr>
<td>Patron Surname</td>
<td>PATRON_SURNAME</td>
<td>PS tag value</td>
</tr>
<tr>
<td>Preferred delivery method</td>
<td>DELIV_METHOD</td>
<td>&quot;M&quot;</td>
</tr>
<tr>
<td>Preferred messaging method</td>
<td>MSG_METHOD</td>
<td>&quot;M&quot;</td>
</tr>
</tbody>
</table>

Note: For this option, the **PS** (Patron Surname) tag is required. If the PS tag has been omitted then the **PI** tag value is used.