Learn about the requirements and patron load process for your authentication method. The process for adding new patron data can depend on your library's authentication method. Find your authentication method below to learn more about authentication requirements and patron load process.

Note: If your library uses Tipasa there are additional considerations noted in the table below.

<table>
<thead>
<tr>
<th>AUTHENTICATION METHOD</th>
<th>AUTHENTICATION REQUIREMENTS</th>
<th>IS A PATRON LOAD REQUIRED?</th>
<th>HOW WILL I ADD NEW PATRONS?</th>
</tr>
</thead>
</table>
| LDAP                  | • External-facing IP/server name accessible from outside your network  
                      • Needs to be secure LDAP (LDAPS or LDAP with StartTLS)  
                      • Ability to open firewall to a list of OCLC IP addresses  
                      • Your LDAP server must be running on port 636.  
                      • Your Root CA certificate from your LDAP server (if your cert is self-signed or not issued by a major certificate authority). Implementation team will alert you if a certificate is required.  
                      • Test account required | In most cases, yes. Both an initial load and ongoing loads are required. | Without provision on demand - Patron load only  
                      OR  
                      Tipasa only: With provision on demand - accounts get created as users log in with their LDAP credentials. This method creates patron accounts which only contain name, email, and LDAP identifier (usually samAccountName). It is possible to include address and phone. |

| CAS                   | • Access from test and production OCLC URLs  
                      • CAS server URLs | Yes | Patron load only |
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<td>SAML (includes Shibboleth, AD FS, Azure, Google SAML, Okta, etc.)</td>
<td>• SAML 2.0 or above&lt;br&gt;• Azure requires Azure AD Premium 1 or E3 plan&lt;br&gt;• Exchange of Shibboleth-related metadata between OCLC and your institution&lt;br&gt;• Persistent ID which will be presented from your Assertion/Subject/NameID from your SAML response&lt;br&gt;• If you cannot send a persistent ID in the Subject/NameID, you can provide us with the name of an attribute that can be sent as a unique, persistent value.&lt;br&gt;• Test account required</td>
<td>In most cases, yes. Both an initial load and ongoing loads are required&lt;br&gt;Tipasa only: Provision on demand (where accounts are created as users log in using information returned via attributes you release in your SAML response) is available. With this option no load is required.</td>
<td>Without provision on demand - Patron load only&lt;br&gt;OR&lt;br&gt;Tipasa only: With provision on demand - as patrons log in to your SAML IdP (if sufficient attributes are being released - at least name fields and email addresses). This method creates patron accounts which ONLY contain name, email and NameID from your IdP.</td>
</tr>
<tr>
<td>Basic WorldShare authentication</td>
<td>• You must require a specific unique value from each patron (could be a username, barcode, student ID, or email address)&lt;br&gt;• You must also have the email address of your patrons (so that they will be able to receive instructions</td>
<td>Initial load is required. Ongoing loads are strongly encouraged to add and update users.&lt;br&gt;Tipasa only: You can also allow patrons to self-register for accounts in Tipasa, but those accounts will only include name, email, and an</td>
<td>Patron load&lt;br&gt;OR&lt;br&gt;Library staff can add users via the Staff Admin interface.&lt;br&gt;OR&lt;br&gt;Tipasa only: Users can self-register for their own</td>
</tr>
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<td></td>
<td>for setting up their password and so that they can receive notifications from circulation and/or Interlibrary Loan)</td>
<td>additional identifying piece of information you define (which will be used as the username).</td>
<td>accounts, which are instantly active.</td>
</tr>
</tbody>
</table>

**Tipasa only:** ILS-based authentication methods *(only SIP or III Patron API using EZproxy in the middle to act as a translator).*

If you want to use CAS or SAML or LDAP, you do not need to use EZproxy at all for authentication to Tipasa.

- You must have EZproxy (either hosted by OCLC or by your institution)
- Your EZproxy server must be using a valid SSL certificate
- Your SIP server or III Patron API must permit access from the IP of your EZproxy server
- Your EZproxy server must be running on either port 443, 8443, or 8447
- Test account required

**Patron load**

**OR**

**Provision on demand** (using their existing ILS-based credentials).

Provision on demand creates accounts with just name, email, and a username (which could be a barcode).

No. You can do an initial load, but it is not required.

In most cases, libraries that select this method do not do a patron load.