Find information about WorldCat Discovery accounts for patrons of non-WMS libraries and learn about the My Account feature for patrons of WMS libraries.

For non-WorldShare Management Service libraries

Allow users to manage personal lists and save searches by enabling end-user sign in.

Enable end-user sign in

All WorldCat Discovery libraries can provide sign-in capability for their users. This enables users to save searches and personal lists. See Share records and create citations for more information.

To enable non-WMS logon options, register your library for end user logon capability. The OCLC implementation team will respond to the request and assist with configuration.

Institutions can select from the following implementation options:

- Create new accounts with an OCLC method that supports self-creation of authenticated accounts
- Use existing accounts with an OCLC link to your institution's existing authentication service, if it is compatible.

Authentication requirements

<table>
<thead>
<tr>
<th>METHOD</th>
<th>AUTHENTICATION REQUIREMENTS</th>
<th>ADDITIONAL INFORMATION</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 list of OCLC IP addresses  
|        | • LDAP server must be running on port 636  
|        | • Root CA certificate from your LDAP server (if your certificate is self-signed or not issued by a major certificate authority). Implementation team will alert  
|        | • Accounts are created automatically when patrons log in to Discovery for the first time  
|        | • Library staff can see patron accounts in WorldShare Admin (names and email addresses)  
<p>|        | • Patrons are greeted with their first name in Discovery upon login |</p>
<table>
<thead>
<tr>
<th>METHOD</th>
<th>AUTHENTICATION REQUIREMENTS</th>
<th>ADDITIONAL INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAS</td>
<td>• Permit access from test and production OCLC URLs</td>
<td>• Accounts are created automatically when patrons log in to Discovery for the first time</td>
</tr>
<tr>
<td></td>
<td>• Supply CAS server URLs</td>
<td>• Accounts will work to authenticate patrons only. No patron name or email address will be visible with the account.</td>
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<td></td>
<td>• GET requests are not currently supported</td>
<td>• Library staff will not be able to see patrons' names or email addresses in WorldShare Admin. All accounts will display as &quot;Not Supplied&quot; as the name.</td>
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<tr>
<td></td>
<td>• Test account required</td>
<td>• Patrons will not see their first names in Discovery upon login</td>
</tr>
<tr>
<td>SAML</td>
<td>• SAML 2.0 or above</td>
<td>• Accounts are created automatically when patrons log in to Discovery for the first time</td>
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<tr>
<td></td>
<td>• Exchange or Shibboleth-related metadata between OCLC and your institution</td>
<td>• Library staff can see patron accounts in WorldShare Admin (names and email addresses)</td>
</tr>
<tr>
<td></td>
<td>• Persistent ID which will be presented from Assertion/Subject/NameID from your SAML response</td>
<td>• Patrons are greeted with their first name in Discovery upon login</td>
</tr>
<tr>
<td></td>
<td>OR</td>
<td>For Azure only:</td>
</tr>
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<td></td>
<td>• If you cannot send a persistent ID in the Subject/NameID, provide the name of an attribute that can be set as a unique, persistent value</td>
<td>• Accounts will work to authenticate patrons only. No patron name or email address will be visible with the account.</td>
</tr>
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<td>• Test account required</td>
<td>• Library staff will not be able to see the patrons' names or email addresses in WorldShare Admin. All accounts will display as &quot;Not Supplied&quot; as the name.</td>
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<td>• Patrons will not see their first names in Discovery upon login</td>
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<tr>
<td>User self-registration (without a connection to an authentication system)</td>
<td>• You must require a specific, unique value from each patron (could be an institutional username, barcode, student ID, or email address); this value will be used by patrons when logging in.</td>
<td>• Library staff can see patron accounts in WorldShare Admin (names, usernames, and email addresses) • Patrons are greeted with their first name in Discovery upon login • Not recommended for libraries considering a move to WorldShare Management Services (WMS)</td>
</tr>
</tbody>
</table>

Note: These logon options are not available to Group Catalogs using WorldCat Discovery.

**For WorldShare Management Service libraries**

WorldCat Discovery allows patrons of WMS libraries to access their library account and take action on their items. For information about creating accounts, please see [User Management](#).

**Patron accounts in WorldCat Discovery**

1. From WorldCat Discovery, click **your first name** in the upper right corner of the screen.
2. Select **My Account** from the drop-down menu. The My Library Account screen appears.

A direct link to your library patrons’ My Library Account will have the following format: https://yourlibrary.on.worldcat.org/myaccount. Replace **yourlibrary** with your library’s identifier.
1. Checkouts

On the My Library Account screen, the Checkouts tab is displayed by default. From this tab, you can:

- View the status of all items you currently have checked out. Use the Sort by drop-down list to sort your checked out items by:
  - Due Date (default)
  - Title
  - Author
  - Format
  - Published Date
- Click the Renew button to renew an item.

2. Holds

Click the Holds tab to view a list of all items you have on hold, including those that are ready for pick-up. Use the Sort by drop-down list to sort your holds by:

- Queue Position (default)
- End Date
- Title
- Author
- Published Date

You can also edit or remove hold requests from the Holds screen.

To edit a hold request:

1. Click the Edit button. The Edit a hold for this item screen appears.
2.  Change the selected pick up location or hold dates.
3.  Click Submit. The request is updated.

To remove a hold request:

1.  Click the Remove button. A confirmation message appears.
2.  Click Yes, remove my hold. The request is removed from your account.

3. Charges

Note: Fees and fines cannot be paid from WorldCat Discovery.

Click the Charges tab to view all outstanding and accruing charges on your account.