

# Tipasa<sup>®</sup>: Authentication options

Method	Authentication requirements	Is a patron load required?	How will I add new patrons?
<b>LDAP</b>	<ul style="list-style-type: none"> <li>• External-facing IP/server name accessible from outside your network</li> <li>• Ability to open firewall to list of OCLC IP addresses</li> <li>• Your Root CA certificate from your LDAP server</li> <li>• Test account preferred</li> </ul>	<p>In most cases, yes. Both an initial load and ongoing loads are required. However, Provision on Demand (where accounts are created as users log in using information returned by your LDAP server) is available. With this option, no load is required.</p>	<p>With provision on demand—Patron load only OR</p> <p>With provision on demand—accounts get created as users log in with their LDAP credentials.</p> <p>This method creates patron accounts which ONLY contain name, email, and LDAP identifier (usually samAccountName).</p> <p>Also possible to include address and phone.</p>
<b>CAS</b>	<ul style="list-style-type: none"> <li>• Access from test and production OCLC URLs</li> <li>• CAS server URLs</li> <li>• Test account preferred</li> </ul>	Yes	Patron load only
<b>SAML</b> (includes Shibboleth, Azure, AD FS, Okta, Google SAML, SURFconext, etc.)	<ul style="list-style-type: none"> <li>• SAML 2.0 or above</li> <li>• Exchange of Shibboleth-related metadata between OCLC and your institution</li> <li>• Persistent Id which will be presented from Assertion/Subject/NameID from your SAML response</li> <li>• Test account preferred</li> </ul>	<p>In most cases, yes. Both an initial load and ongoing loads are required.</p> <p>However, Provision on Demand (where accounts are created as users log in using attributes returned by your IdP) is available. With this option, no load is required.</p>	<p>Without provision on demand—Patron load only OR</p> <p>With provision on demand—as patrons log in to your SAML IdP (if sufficient attributes are being released—at least name fields and email address).</p> <p>This method creates patron accounts which ONLY contain name, email, and NameID from your IdP.</p>

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<b>ILS-based authentication methods</b> (only SIP or III Patron API using EZproxy)	<ul style="list-style-type: none"> <li>You must have EZproxy (either hosted by OCLC or by your institution)</li> <li>Your EZproxy server must be using a valid SSL certificate</li> <li>Your SIP server or III Patron API must permit access from the IP of your EZproxy server</li> <li>Test account required</li> </ul>	No. You can do an initial load if you'd like, but it is not required. In most cases, libraries choosing this method do not do a patron load.	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).
<b>Basic authentication</b>	<ul style="list-style-type: none"> <li>You must require a specific, unique value from each patron (could be a username, barcode, student ID, or email address).</li> <li>You must also have the email address of your patrons (so that they will be able to receive instructions for how to set their password and also so that they can receive ILL-related notifications).</li> </ul>	Yes, recommended (although you could also choose to allow patrons to self-register, but those accounts will only consist of name, email, and an additional identifying piece of information you define).	Patron load  OR  Library staff can add users via the Staff Admin interface.