

NC LIVE's Hosted Proxy Implementation Checklist

This document serves as a basic checklist for implementing NC LIVE's hosted proxy server. Any questions regarding this process can be directed to the NC LIVE Help Desk at help@nclive.org.

To start the process:

- Complete the Hosted Proxy Implementation Interest survey:
<https://www.surveymonkey.com/r/SLPL7RX>
 - NC LIVE will contact you within 5 business days to confirm receipt of the survey and assign you to a cohort based on your timeline.

Recommended steps prior to the start of your cohort:

- Create a list of non-NC LIVE resources the library subscribes to. For each resource on your list, answer the following questions:
 - Does my library want to remotely access this resource through the NC LIVE proxy server?
 - If yes, how do users currently remotely access this resource?
 - Who is the technical contact for the resource? i.e. How would I tell the vendor that the resource is down?
- Contact the IT department and find out what local authentication methods they would be willing to use.
 - The list of methods that work with EZproxy are here:
<https://www.oclc.org/support/services/ezproxy/documentation/usr.en.html>
 - Think about all variety of users – ex. If students have usernames, but community users have library card numbers.

Required steps:

- Attend the “What is Hosted Proxy?” webinar with your assigned cohort.
 - NC LIVE will provide you with a link to the local authentication survey within 2 business days after this webinar.
- Fill out the local authentication survey ([with your IT department's help if necessary](#))
 - This local authentication survey will provide details on how your patrons will sign in (ex. username/password or library card number/PIN).
 - NC LIVE staff will provide the IP addresses to you and your IT contact within 5 business days after filling out the survey.
 - NC LIVE will contact you or your IT contact within 5 business days to gather more information and start testing your local authentication.
- Provide logo, colors, and links for new login page if applicable.
 - NC LIVE will have a new login page for you to tweak and approve within 10 business days after filling out the local authentication survey.

- Attend the “Implement Hosted Proxy” webinar with your assigned cohort.
 - NC LIVE staff will provide your ProxyAdmin tool credentials within 5 business days after this webinar.
- Add locally licensed resources to the ProxyAdmin tool.
 - You may begin this step as soon as you receive ProxyAdmin credentials. Instructions for testing will be included with your credentials.
- Select an implementation date.
 - NC LIVE staff will provide a link to a poll to select an implementation date within 10 business days of the “Implement Hosted Proxy” webinar.

Recommended step:

- Attend the “Any Questions?” webinar scheduled for the end of your cohort to ask any lingering questions.

Testing Access to Resources

Instructions for testing remote access to resources will be included with your ProxyAdmin credentials.

NC LIVE resources can be tested immediately.

Non-NC LIVE resources can be tested once the vendor has your IP address and their information has been added to the ProxyAdmin tool.

Once hosted proxy is implemented, users within the library will be IP-authenticated and should **not** be prompted for credentials. However, to allow you to test as if you are off-campus, the library’s IP authentication will be disabled until implementation day. If you want it enabled early, let us know.

Implementation Day Steps

On implementation day, NC LIVE will “flip the switch” and turn on Hosted Proxy for your library. This means that NC LIVE will update your library’s login page on nclive.org to route users to the new proxy login.

Instead of entering an NC LIVE password or library card number that is matched against a pattern, your patrons will now enter credentials that will be checked against the local authentication method you selected.

If you choose not to use NC LIVE's proxy server for any locally licensed resources, you will not have to take any additional steps on implementation day. As long as the current links to your NC LIVE resources are similar to this URL: <http://www.nclive.org/cgi-bin/nclsm?rsrc=229>, your patrons will be routed correctly.

If you choose to use NC LIVE's proxy server for locally licensed resources, the steps required will depend on the current setup of your individual library. In general:

- If your library currently has a proxy server, you will need to replace the proxy prefix anywhere you have URLs.
- If your library does not currently have a proxy server, you will need to add the proxy prefix anywhere you have URLs.

For example, if your library has a subscription to World Book Online, your users may currently access it through one of these URLs:

No proxy server: <http://www.worldbookonline.com>

Existing proxy server: <http://library.proxy.com/login?url=http://www.worldbookonline.com>

The URLs would be changed to something like:

No proxy server: <http://proxy000.nclive.org/login?url=www.worldbookonline.com>

Existing proxy server: <http://proxy000.nclive.org/login?url=www.worldbookonline.com>

The amount of time it takes to completely switch over to hosted proxy will vary depending on your library's current setup and your preferred timeline. Most of these changes can be completed on or any time after implementation day. Places you may need to change the URLs include:

- Library website
- LibGuides
- 856 fields of MARC records
- With vendors (Proquest, Gale, Ebsco, Films on Demand, etc)