

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 get more information:

- Watch [What is hosted proxy?](#) webinar (30 minutes)

To get started:

- Watch [Hosted proxy implementation](#) webinar (26 minutes)
- Send an email to the NC LIVE Help Desk (help@nclive.org) with your library system name and, if known, the date you would like to have the implementation complete
 - NC LIVE will contact you within 2 business days to confirm receipt of the email and schedule a 30 minute meeting to answer questions and discuss next steps

Recommended steps:

- 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 at the vendor for this resource? i.e. If the resource were to go down, whom would you contact?
- Contact your IT department and find out what local authentication methods they would like to use.
 - The list of methods that work with EZproxy are here:
<https://www.oclc.org/support/services/ezproxy/documentation/usr.en.html>
 - Remember this applies only to users that will have **remote or off-campus** access. On-campus users will not be required to login in most cases.

Required steps:

- Attend the 30 minute meeting with NC LIVE
- Have your IT team fill out the [local authentication survey](#)
 - The local authentication survey will provide details on how your patrons will sign in (ex. username/password or library card number/PIN)
 - NC LIVE will provide the IP addresses to whitelist to your IT contact
 - NC LIVE will work with your IT team to gather any additional information required and start testing your local authentication.
- NC LIVE will provide you with [ProxyAdmin](#) credentials

- If you want to use the [login page template](#)¹, provide the logo file, colors, and links you would like to use
 - NC LIVE will have a new login page for you to approve within 5 business days after you provide the information
 - Shibboleth, CAS, Blackboard, and Bibliocommons do not require a new login page. These services all redirect patrons to the service's existing login page.
- If you want to use a login page other than the template, provide the html, css, and logo files for the login page you want to use
- 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

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.

¹ This login page template was created by Christine Vasica (James Sprunt Community College)

If you have chosen **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, and you do not have a proxy server, your URL will change from this:

<http://www.worldbookonline.com>

to this:

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

If your library has an existing proxy server, your URL will change from this:

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

to this:

<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 at 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)