World Book Web Access FAQ
Version: 01-26-10

Page 1, Overview

<u>Overview</u>

Thank you for your subscription to the World Book Web!

This document is designed to help you connect to your subscribed products. Please share this information with anyone that is involved with getting your patrons connected to World Book, including the technical department at your institution.

The following subjects are covered in this document.
Please review the sections in the pages that follow for more information.

- **Common Issues**
  - System Status
  - Subscription Status
  - Account Authentication Settings
  - Browser Privacy and Security Settings
  - Browser Javascript Settings
  - Minimum Requirements
  - Public IP Addresses

- **Testing Your Access**
  - Welcome Message
  - Internet Access
  - World Book Test
  - My Access

- **Advanced Configurations**
  - Security
  - Trace Route
  - EZproxy
  - Federated Search API

- **Home Access**
  - Web Graphics
  - Desktop Icons

- **Customer Identifiers**
  - Identifiers – CID, IP, Referring URL and Username - Password
  - Localization and Usage

Questions? Contact World Book Web Support: USA: 1-800-338-8382
                                               Canada: 1-800-837-5365
                                               Email: wbwtech@worldbook.com

World Book Web Access FAQ
Version: 01-26-10

The World Book Web suite of online products is hosted by one of the largest Internet service providers in North America. The network continually strives to maintain over 400% availability above peak bandwidth, to ensure customer access even under the heaviest online traffic.

However the availability of the World Book Web is dependant on more than the hosting environment provided by World Book's systems. There are several other factors that can affect availability including:

- The customer's subscription to the World Book Web should be in good standing, with active subscriptions on the customer account for the user to access.

- The account should be pre-configured for user access, including the choice of authentication type and access information supplied by the customer, including ID Password, IP number, Referring URL and/or Library Card number. If no access information has been provided for the account, please contact Customer Service.

- The user's computer must meet the minimum requirements of the supported browsers listed in the Help file in each World Book Web product. Please consult the browser's home web site for a list of these minimum requirements.

- The browser being used to access the World Book Web must have the required settings which will allow access. These include setting the browser to use JavaScript as well as setting the Security and Privacy settings sufficiently so that they will not block access to the site.

- All of the network connections between the user and World Book's systems must be functioning properly, including connections provided by the customer's ISP and third party network providers.

- The local network provided at the user's location must be able to support the user requests without congestion by supplying sufficient bandwidth for the number of simultaneous requests at that location.

- Access at the user's location may be secured by a firewall on the local network or by security software on the local computer. The network firewall and security software must allow user access to all of the URLs required for normal functions within the World Book Web. See below for a list of these URLs.

World Book Web Access FAQ
Version: 01-26-10

Common Issues

The following list of common issues may affect your user's access to the World Book Web. Please use this list to verify user access.

1. **System Status** - Consult the World Book Status page to check for system availability messages. The Status page is maintained regularly and will display the current system status. If there are issues within the World Book hosting environment, these will be posted on the Status page:

   http://www.worldbookonline.com/status.jsp

2. **Subscription Status** – The customer's account should be in good standing with current subscriptions to the World Book Web products to allow user access. The Account Administrator can check the account's standing by accessing their account information online:

   http://www.worldbookonline.com/myaccount

   After logging in, the Administrator can verify the account's standing by referring to the Manage Account page and checking the dates for the subscribed products. If the subscriptions have expired, please contact your World Book Sales Representative.

3. **Account Authentication Settings** - The customer's account authentication must be pre-configured for their users to access the World Book Web. The account Administrator can check the authentication settings by accessing the World Book My Account site.

   http://www.worldbookonline.com/myaccount

   After logging in to My Account, click on Authentication and then select the authentication type that has been pre-configured. These include: IP Address, ID Password, Referring URL and Library Card number.

   If the Administrator has not provided access information to Customer Service or if the authentication types displayed in My Account are incorrect, Customer Service should be consulted so that these may be configured.

Page 4, Common Issues continued

4. **Browser Privacy and Security Settings** – For the user to connect, the browser settings must allow sufficient rights to reach the World Book Web domain. Check the browser's Security and Privacy settings to ensure they are not set too high for normal web access. Consult your browser's Help file for more information regarding Security and Privacy settings.

   World Book recommends that Security and Privacy be set to *Medium*.

5. **Browser JavaScript** - The browser settings should allow JavaScript to run. JavaScript is required for the functioning of the World Book Web. If the browser's use of JavaScript is turned off, access to the World Book Web will be impeded. Consult your browser's Help file for more information regarding JavaScript settings.

   The Word Book Web requires JavaScript to be set to *Enabled*.

6. **Minimum Requirements** – The World Book Web supports standard browsers used by more than 99% of its patrons. Supported browsers are recommended and are listed in the World Book Help file of each online product.

   The browser's minimum requirements must be met in order for the browser to function normally, including the speed and memory of the user's computer. For a list of the Minimum Requirements, consult your browser's Help file or the browser manufacturer's web site.

7. **Public IP Addresses** – If your institution has chosen IP address as an authentication method, a public IP is required. A public IP is an address that is accessible through the public Internet via DNS.

   Private IP addresses are commonly used within an institution's internal network. Private IPs cannot be used to access World Book directly, but rather the public IP must be provided instead.

   The following are private IPs and their ranges which should <u>not</u> be supplied to Customer Service for access to World Book:

010.000.000.000	to	010.255.255.255
172.016.000.000	to	172.031.255.255
192.168.000.000	to	192.168.255.255
169.254.000.000	to	169.254.255.255

World Book Web Access FAQ
Version: 01-26-10

Testing Your Access

If a user accessing the World Book Web is experiencing slowness or other issues relating to access by subscribed users, there are several tests that can be conducted in order to help identify the source of the issue. Below are steps which can be taken in this process:

1. **Welcome Message** – The Super Home Page contains a Welcome Message in the upper right corner, indicating the name of the institution on the account that is being accessed.

    Check the Welcome Message by logging in to the World Book Web. If the Super Home Page is not displayed by default, it may be accessed by clicking the link "Switch to another World Book Site" found near the bottom of each web page.

    When accessing the World Book Web, users should utilize the custom URL for their institution's account. This URL will be in the format:

    http://www.worldbookonline.com/?subacct=XXXXX

    where XXXXX would be replaced by your institution's World Book account number.

    If the Welcome Message displayed is not that of your institution, or if there are questions regarding the use of the custom URL, contact Customer Service.

2. **Internet Access** - The user's location should provide access to the public Internet, so that the user may reach the World Book Web.

    Test the Internet connection by accessing an unauthenticated page on the World Book Web such as the World Book Training site:

    http://www.worldbookonline.com/training

    A successful page load of an unauthenticated page on the World Book Web indicates that Internet access for the user is functioning normally.

    If the user cannot reach an unauthenticated page of the World Book Web, consult your institution's technical department to have the Internet access checked.

Page 6, Testing continued

3. **World Book Test** – If you are unable to enter the World Book Web, use the following URL to test the network access:

    http://www.worldbookonline.com/test

    Copy and paste all of the information on the test results page and send this to wbwtech@worldbook.com along with a description of the issue and your contact information.

4. **My Access** – If you are able to enter the World Book Web and would like to see which account you are accessing through and authentication details, test your connection from a computer that would be used to access the World Book Web.

    Open the World Book Web as you normally would and click on the *Contact and Support* link, found in the meta navigation links at the bottom of each authenticated page (just above the Copyright).

    At the bottom of the *Contact and Support* page will be displayed your My Access details. Copy and paste all of the information regarding your access and send this to wbwtech@worldbook.com along with a description of the issue and your contact information.

World Book Web Access FAQ
Version: 01-26-10

Page 7, Advanced Configurations

Advanced Configurations

The following technical specifications are for advanced users and IT professionals. Please consult with your technical department regarding the following tests and configurations:

1. **Security** – If the local computer accessing the World Book Web is running security software or if the local network has a firewall, the settings of these should be checked. The World Book Web requires that access to the following URLs be allowed in firewalls and security software:

   http://www.worldbookonline.com
   http://worldbook.planetasaber.com
   http://www.google-analytics.com
   http://www.worldlingo.com
   http://www.edgate.com
   http://www.adobe.com

   Consult with your institution's technical department for more information regarding security software and firewall settings.

2. **Traceroute** – A test may be conducted to determine the route taken by packets across an IP network. This test is called a *traceroute*. This can be used to analyze the network route taken by the user request when accessing World Book.

   A traceroute may be conducted from the user's computer to the World Book Web by making a traceroute to www.worldbookonline.com. After conducting a traceroute to World Book, send the results to wbwtech@worldbook.com along with your contact information and a description of the issue.

   Additionally, a traceroute may be conducted by World Book to the user's network. For this test, your institution's public IP address should be supplied to Customer Service.

   World Book recommends that customers consult with their technical department when conducting traceroutes or providing their network's IP information.

   WINDOWS: Open the command line by going to Start>Run then entering CMD EXE. In the command line enter TRACERT WWW.WORLDBOOKONLINE.COM to run the traceroute.

   MACINTOSH: Open the Termimal by going to Applications>Terminal then entering TRACEROUTE WWW.WORLDBOOKONLINE.COM in the terminal window.

3. **EZ Proxy** – Customers accessing the public Internet through EZproxy should place the following entry into the ezproxy.cfg file on their EZproxy server:

   Title   World Book Web
   URL   http://www.worldbookonline.com
   Domain   worldbookonline.com

   If World Book Hispánica Saber Gran Enciclopedia Hispánica has been subscribed, an additional line is required in the ezproxy.cfg file:

   DJ   worldbook.planetasaber.com

   For more information regarding EZproxy, consult the manufacturer's web site: http://www.ezproxy.com

4. **Federated Search** – World Book offers a federated search API using the RSS 2.0 XML standard. Currently the federated search API has been integrated with popular software packages from federated search vendors including Follett, Book Systems, Inc and Serial Solutions.

   If your institution is currently using a federated search, World Book recommends that you contact your federated search vendor and request that they integrate the World Book federated search API for all of your World Book products.

World Book Web Access FAQ
Version: 01-26-10

<u>Home Access</u>

Referring URL - Home Access Made Easy

The benefits of using Referring URL for home access are that it is easy to implement and even easier for users to remotely access the World Book Online Reference Center.

Requirements:

The requirements for Referring URL authentication are:

- Place a link to World Book on a web page on your site
- Secure the web page so non-subscribers cannot access it
- The web page must have a static URL
- Send the URL to Customer Service to be included in the World Book database

Once the requirements above have been implemented, the link will begin working immediately. Users will not need to remember any passwords or web addresses for World Book. They will go to *your* site, login, and click the link. It's that easy.

Definitions:

1. <u>Link to World Book</u> - the link to the Online Reference Center should be: http://www.worldbookonline.com.

   This html code may be cut and pasted into your secure web page:

   World Book Web

2. <u>Secure Web Page</u> – the page on your site, where the link to World Book is placed, must be secure. That is, it must not be accessible to non-subscribers. Every account has a limited number of licenses. If non-subscribers are accessing World Book on your account, then they may be preventing access by your authorized users.

World Book Web Access FAQ
Version: 01-26-10

Page 10, Home Access – Referring URL Continued

3. <u>Static URL</u> – the web page on your site, where the link to World Book is placed, must have a static URL. Every visit to that page should have the same web address. If the address changes with each visit, for instance if there are session variables, the Referring URL link will not function.

   Here is an example of a static URL that will work with Referring URL:
   http://www.mywebsite.edu/reference/online-resouces.html

   A dynamic URL that changes with each visit, it might look like this:
   http://www.mywebsite.edu/reference/default.php?id=1154443575

   If the last number, or any part of the address changes with each visit to the page, or after logging out and logging back in, then the URL is Dynamic. Dynamic addresses will not work with Referring URL access. A static URL is required, where the address does not change.

4. <u>Send the URL to Customer Service</u> – once the link to World Book is placed on the secure web page of your site, send the static URL to Customer Service by email. The email address is sub.questions@worldbook.com. A login and password to your site should also be provided so that we may test the functionality and make sure the link is working properly.

World Book Web Access FAQ
Version: 01-26-10

Page 11, Home Access – Referring URL Continued

Best Practices:

Here are some tips on getting the Referring URL link up and running:

- Framed Pages – if your web site uses frames, the address in the browser's address bar may not be the actual address of the frame where the World Book link is, so you will want to double check the address of the framed page. Using your mouse, right click on the web page close to where the link to World Book has been placed. A dialog box from the web browser will display. Choose "Properties" (Internet Explorer) or "View Page Info" (Mozilla, Firefox). This will show the actual page address of the frame. This is the URL to send to World Book.

- Popups, Redirects, New Browsers – although using a popup, redirecting to a separate page, or opening a new browser may work when the Referring URL is clicked, this functionality is not recommended due to the increased complexity of the implementation. Many browsers have popup blockers that will interfere and redirects or opening a new browser can change the URL which the Referring URL uses. A standard link to http://www.worldbookonline.com is recommended.

- Navigation Bar Links – placing a Referring URL link in a navigation bar is generally not compatible with Referring URL. This is because the page URL will change from page to page, while Referring URL requires a single, static address. Placing the Referring URL link in the body of the page is recommended.

- Maintenance – if the address for the page changes, where the Referring URL link is placed, send us the new address as soon as possible. Changing the page address will cause the Referring URL link to stop working.

- Home Use – If a Referring URL is accessed from within an institution, it will not be logged as in-house. The referring URL link should only be used outside the institution, so that the usage is logged in the Usage Reports as Remote Use.

World Book Web Access FAQ
Version: 01-26-10

Page 12, Linking to World Book

<u>Linking to World Book</u>

Web Graphics

The Web Graphics feature provides an easy to use method to access the World Book Web. These graphics will provide a web link from your website to the World Book Web products to which you have subscribed.

The Web Graphic includes an icon for the World Book product of your choice and the link to the product all in one. Just cut and paste the embed code into your web page and the graphic and link will work automatically.

<u>To access the Web Graphics page</u>:

1. Go to World Book My Account: http://www.worldbookonline.com/myaccount
2. Log in with your Administrator ID (your email address) and password.
3. On the Dashboard page, see the Downloads section and click on **Web Graphics**.

The Web Graphics page provides graphics which link directly to each online product offered by World Book, as well as a main World Book Web graphic, which links to the Super Home Page.

<u>To place a Web Graphic on your institution's web page</u>:

1. Choose the graphic of your choice from the Web Graphics page.
2. Below the graphic is an embed code, copy the code in the box.
3. Find the place in your web site's html page where you would like the Web Graphic to appear.
4. Paste the embed code and save the html page to your web site.
5. The World Book Web Graphic will now appear automatically.

<u>Best Practices</u>:

*   Every graphic's embed tag is customized to your account, so don't share these tags with other institutions or post your Web Graphics where users of other institutions might access them. The Web Graphics provide a convenient link to the World Book Web and will let us know that the user clicking on the graphic is from your institution.

*   The Web Graphics provide a link, but do not log the user into the World Book Web. The graphics are designed to work with the authentication method that your World Book account is already using.

*   The Web Graphics may be posted on your public web page or may be posted behind your institution's own login. They will also work with intranet pages if your intranet has access to the Internet.

World Book Web Access FAQ
Version: 01-26-10

Desktop Icons

World Book provides an application that will install a complete set of icons for computers using the Windows operating system. When installed, these icons will provide direct links to your World Book products on a computer's desktop and will automatically bypass the World Book login screen.

- The Desktop Icons may be used from home or within an institution.
- The Desktop Icons are suitable for accounts using Username/Password and IP authentication.
- Each computer may be individually installed with the Desktop Icon linking to the World Book products that are suitable for the type user that may be using that workstation.

System Requirements: Windows operating system
Installation: To download and install the icon for World Book Online on a Windows computer, you will need the following:

- A standard Internet browser supported by World Book.
- Your ID and Password for World Book Online. Or
- Installation of this program on a computer that is IP authenticated by World Book.

Installation Instructions for the World Book Icon on Windows:

1. Click on the Download icon link found on the web page:
   http://www.worldbookonline.com/myaccount/downloads?id=Desktop
   This will download the World Book Web Icon Installer to your computer.
2. Double click on the World Book Web Icon Installer icon, this will launch the World Book Online Setup Wizard.
3. On the License Agreement page select I Agree.
4. Check or Uncheck the box(es) for the component(s) that you wish to install and press *OK*. (Note: if you are not subscribed to a World Book product, the icon will not provide access).
5. Choose a login method. If you have an ID and Password, select Login ID and click *NEXT*. If the computer you are installing the Icon to is authenticated by IP address, select IP Authentication and click *NEXT*.
6. If Login ID has been chosen, enter your World Book ID and password. This will be the one that you use to access either from within the school/library or from home, depending on where you are installing the icon program. Press Install.
7. The icon is now installed on your computer. Click *FINISH* to complete the process and close the World Book Setup Wizard.
8. To uninstall the icon, open the appropriate World Book menu entry in Start and click the uninstall option.

Customer Identifiers

The World Book Web provides many features which are customized to your account. These are called "Localizations". Localization features may be set manually in you're my Account administrator control panel or can be invoked automatically by accessing your subscription with a Customer Identifier. Additionally, Usage Reports can be provided specific to your institution, if your account has been previously configured for usage collection and the patrons access the World Book Web with a Customer Identifier.

Customer Identifier Definitions:

Localization: Any feature which is customized to the user's account.

        These include:

- *Account Name* – the account name can be displayed on the login page.
- *Welcome Message* - found at the top of the Super Home Page.
- *Resource Guides* - can be set to your geographical location.
- *Newspapers, Magazines* and *Newsfeeds* - can be localized to your geographical location.

Usage Reporting: Statistical monthly tabulation of the patron usage of the World Book Web. Reports are available with an administrator's login to My Account.

Reports can be generated by Account, Sub Account, Product, In-House or Remote Usage detailing Estimated Hits, Sessions, Searches and Content Views. Use of a Customer Identifier is required to accurately log usage.

Customer Identifier: Any method of identifying the user's account, location and method of access for the purpose of providing Localization and Usage Reporting.
        These include:

- URL based CID
  (customer identifier number where the account number is appended to the URL)
  Example: http://www.worldbookonline.com/?subacct=12345
- Username and Password
  (where the login is unique to an institution and is not shared with others)
- IP Address
  (where an IP is unique to an institution and is not shared with others)
- Referring URL Link
  (where the referrer is unique to an institution and is not shared with others)

World Book Web Access FAQ
Version: 01-26-10

URL Based CID

The URL based CID is the preferred method of identification. Anywhere a patron may receive instruction or linking for the World Book Web, the URL based CID should be used.

Why use the CID URL?

- Accounts whose consortium's are using proxy servers, may be obscuring your patron's identity. Use the CID URL to identify your patrons.
- Usage Reporting accuracy is dependant on correctly identifying your patrons are accessing with your account's prescription.
- Localized features and content is only possible if your patrons are identified.

The following methods are provided by World Book for URL Based CID identification:

- The Thank You message sent to the account administrator upon activating the subscription contains the URL based CID for your account. Copy and paste this URL in all communications, web links and areas where your patrons will have access to the World Book Web.

- The Web Graphics contain the CID URLs for your account. Log in to the My Account site with your administrator's login and copy and paste the web code provided on the Web Graphics page into your institution's own web site. Your patrons which click on the graphics for access to the World Book Web will use the CID URL automatically.

Username and Password

Username and password is perhaps the most commonly used method of authentication. If your login is unique to your institution, it may also be used to identify the patrons who are accessing from your institution.

- World Book encourages all administrators to contact Customer Service to set up a unique login for their institution.

- The Desktop Icon may be used in conjunction with username and password to identify your users. Please see the section above regarding Desktop Icons.

World Book Web Access FAQ
Version: 01-26-10

IP Authentication

IP authentication may be used for both authentication and identification, if your institution has IPs that are unique to your institution and are not shared with others. If your institution is part of a consortium or if there is a known proxy server in your network, please consult with your technical department.

- World Book encourages all administrators to contact Customer Service to set up a unique IP for their institution.

- The Desktop Icon may be used in conjunction with IP addresses to identify your users. Please see the section above regarding Desktop Icons.

Referring URL

Referring URL may be used for both authentication and identification, if your institution has a web page that is unique to your institution and is not shared with others.

- Referring URL is appropriate for linking users at home from your institution's web site to the World Book Web. Your web site must have its own authentication method such as username and password to prevent unauthorized users on the Intenet from accessing your subscription.

- As long as the Referring URL link is used only by users from your institution, it may be used successfully as a method of identification.

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