This is the guide I created for the EZProxy implementation at the University of Northern British Columbia. Its main focus is maintaining access to our electronic resources; I do not deal with group setup, authentication, servers, or system settings. Please email mandi.schwarz@unbc.ca with questions.

Overview of our setup

Our main config file
IncludeFile config/config10-rejectip.txt
IncludeFile config/config15-publicly-accessible.txt
IncludeFile config/config20-group-default.txt
IncludeFile config/config29-ebsconet.txt
IncludeFile config/config40-group-alumni.txt
IncludeFile config/config45-sage-alumni.txt

We have a folder, config, in which we store these other files, in the proper order (as EZProxy reads from the top down). This allows us to manage many different groups and setups with minimal confusion.

About the files

The numbering system (config 10, config 20, config 25, etc) is so we can add additional files as needed, and have them placed appropriately.

The rejectip file holds a list of IP addresses that we want to block from accessing EZProxy - this primarily contains a list of IPs from France that were going through our EZProxy server to access Canadian government documents.

The publicly accessible file is there as we want to track the clickthroughs to see if our publicly accessible resources are actually being used – the file starts with E 0.0.0.0-255.255.255.255 (ie exclude everyone) so as the proxy finds the URL in that file, it kicks the users out right away and they go on to the resource unproxied. Of course, the file also ends in I 0.0.0.0-255.255.255.255 (ie include everyone) to bring everyone back in to the proxy for the next file: group default.

We use LDAP authentication which sends the user group; different groups (faculty, staff, student, alumni, and noaffiliation) have been set up in our user file to allow access to certain resources. The groups that get general access (staff, students, and faculty) are set up to belong to the default group, and they get access to everything in the default file and the alumni file. Alumni get access to resources in the two alumni files, but not group default or ebsconet. Users with the group noaffiliation do not get access to our resources; they are instead sent to an error page (other.htm) with more information.

We also allow users to authenticate with their library barcode and pin; Sierra then sends their ptype (patron type) which is then used to determine which resources they can access.

The group default file includes resources that require on-campus authentication (because they don't allow walkin users, or are restricted to allowing only one IP address) which are entered before the line that excludes our on-campus IP range. Anything else comes after this Exclude line, so on-campus users are not prompted to log in.

The ebsconet file is one we've created for our EBSCO subscriptions.

The group alumni file contains anything that allows alumni access (which have a specific ptype or user group which is assigned to the alumni group). I've heard of other institutions setting up a separate proxy server for alumni access; for us, using groups was the best solution. The Sage alumni file is similar to the ebsconet file - Sage Premier is accessible by alumni. These files are the last ones read to limit conflicts between the groups.

The stanzas in each file are arranged more-or-less alphabetically. Some stanzas are out of order (ex. LexisNexis is the first stanza in Group Default after the Exclude directive, followed by EBSCO, then the alphabet starts with ACM) as that was advised to limit conflicts with other stanzas.

How to add/edit entries in the ezproxy config file

Most useful thing I know about EZProxy stanzas

EZProxy allows users to access a URL that's specified in stanzas using the U (URL) line or the H (Host) / HJ (HostJavascript) line, and the D (Domain) / DJ (DomainJavascript) lines allow the user to navigate within those domains once they have successfully proxied into a website.

How to access the config file

1.   From the Start Menu, open Computer (or My Computer)
2.   If you have the EZProxy server mapped to a drive, open it. Otherwise, in the address bar where it says "Computer" type in the server address.
3.   Double click on the config folder, and choose the appropriate file to edit it
4.   Make changes and save when done
5.   Go to the proxy's admin page
6.   Type in the administrator username and password (found in the user.txt file) and hit enter
7.   Click "Restart EZProxy" and follow instructions to restart
8.   Test changes (this may require using Opera with the VPN enabled, or logging in to StrongVPN)
9.   Log out of the admin interface once testing is complete.

To add an entry that does <u>not</u> require forced on-campus authentication

1.   Scroll to the line <u>##Databases begin</u> and find a place to put the entry after this line (they are generally sorted alphabetically; watch out for big batches of journal entries).
2.   Keep in mind: The entry must be separated from other entries by a blank line on either side. There must be a space after each line indicator as well (ex. T Ebsco as opposed to TEbsco). The proxy reads this file from the top down, so watch out for conflicting errors elsewhere in the config file. Hosts and domains can be found by perusing the site while keeping an eye on the browser's address bar. We must ensure that all URLs associated with the resource are accounted for in the config file so users can fully use the resource. EZProxy allows users into a database based on the URL and the host, but allow browsing (after the user has entered) based on the domain. This can cause problems with journal providers that add the journal code to the URL as another host (ex Oxford used to do this: em.oxfordjournals.org, english.oxfordjournals.org, ehr.oxfordjournals.org, etc.).
        a.   Enter any comments before the main entry by typing ## and then the comments
        b.   Enter the title after a T
        c.   Enter the URL after a U

      d.   Enter any hosts after an H (hosts include subdirectories before the domain in the URL – see example; HTTPS hosts must also be specified alongside HTTP)

      e.   Enter any domains after a D (domains are the last part of the URL – see example)

          Example:

          T DSP E-Collection

          U http://dsp-psd.communication.gc.ca/Epubs/epubs-e.html

          H https://dsp-psd.communication.gc.ca

          D communication.gc.ca

3.   Save the config file.

4.   Restart the server.

5.   Test the entry.

To add an entry that <u>requires</u> on-campus proxy authentication

(ex. if no walk-in users are allowed, or if we can access the resource only from our proxy IP address):

Add the entry as described above, but in the group of databases at the top of the group-default config file before the Exclude IP section in the config file.

To add an entry that will allow alumni access

Add the entry as described above in the group-alumni config file.

To add an entry for publicly accessible resources

Add the title (T) and URL (U) to the publicly-accessible config file. These are the only two lines needed, as the user will enter through the exact URL and then be booted out of the proxy – we are doing this to collect click-through stats on our publicly accessible resources. Do not add anything that will conflict with our licensed resources (ex EBSCO, JSTOR, etc) as this will break access for off-campus users.

To edit an entry

1.   (remember that big changes must be implemented in the test server first):

2.   Ctrl+F to find the entry that requires editing.

3.   Make the changes. Do your best to make sure this will not conflict with other entries. Try Ctrl+F for the host and domain entries as well.

4.   Save, restart, and test.

Other Resources

EZProxy listserv (login required): http://listserv.oclclists.org/scripts/wa.exe?A0=EZPROXY-L
Configs from OCLC: https://help.oclc.org/Library_Management/EZproxy/Database_stanzas
Config directives: https://help.oclc.org/Library_Management/EZproxy/Configure_resources