

Getting Started with EZproxy

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Overview

How it works

EZproxy is a customizable middleware program that provides access to your library's licensed content for your remote library users.

It operates as an intermediary server between your users and your licensed databases. Your users connect to EZproxy, then it connects on their behalf to your licensed databases to obtain web pages and send them back to your users. Since EZproxy runs on a machine on your network, your database vendor sees the requests as coming from an IP address on your network, so it permits access.

Let's assume that `ezproxy.yourlib.org` is your EZproxy server and that you subscribe to `somedb.com`. To make this database available, you edit `config.txt` and add these lines:

```
Title Some Database
URL http://somedb.com/search/
Domain somedb.com
```

With these lines in place, you could make this database available from any web server with a URL like this:

```
<a href="http://ezproxy.yourlib.org:2048/login?url=http://somedb.com/search">Some Database</a>
```

If on-site users click on such a link, they are sent straight to the database. Off-site users are required to authenticate before proceeding. Once authenticated, the off-site user accesses the database through a "virtual web server."

When this user requests documents from this virtual web server, EZproxy makes the same request to the `somedb.com`, then sends the response back to this user. During this transaction, the request to `somedb.com` comes from your own server, so `somedb.com` views it as one of your IP addresses and allows the access.

Since EZproxy is highly customizable, there are additional configuration considerations to get it fully functioning. Once configured, however, it is fairly straightforward to add new resources.

Ability versus right

EZproxy allows you to extend your databases to remote users. However, your licensing agreements with database vendors may not authorize you to provide remote access. As an implementer of remote access, it is your responsibility to verify licensing agreements and only permit remote access as authorized.

EZproxy and OCLC

OCLC acquired EZproxy in January 2008 to help more libraries effectively serve their remote users. OCLC will continue to develop and support EZproxy by piloting new functionality and working with commercial vendors to create new connectors to authentication systems and online content resources to libraries.

Software and instructions

Software downloads and initial-setup instructions are available at www.oclc.org/support/services/ezproxy.en.html.

Initial evaluation

Use the fully functional version of EZproxy for your initial evaluation. Then start your subscription on the **Ordering** page of the EZproxy service page at www.oclc.org/support/services/ezproxy.en.html.

Supported platforms

Supported platforms are:

- Linux
- Solaris 10 (x86)
- Windows (32-bit, as well as 64-bit)

For Windows 2008, WOW64 may be required, as EZproxy is truly a 32-bit application.

Note: The only functional difference between the Linux, Solaris and Windows versions of EZproxy is internal support in the Windows version to authenticate users against a Windows domain.

Requirements

Experience

Before your library installs EZproxy you'll need to have staff available who can:

- Understand the operating system where EZproxy will be installed, as well as its file structure and permissions
- Configure your DNS and firewall
- Provide you with your site's IP address ranges
- Assist with configuring EZproxy to work with your existing authentication methods, if applicable, and has basic experience and skills to manage web servers
- Know the user authentication system your library has—or wants to implement—as well as the authentication method used by your database content providers to access to their resources for example IP address recognition.

Optionally, your staff will also benefit from having basic knowledge of an IP proxy server and an understanding of URL rewriting and strategies behind using a URL Rewriting program.

You'll want to review all technical requirements and configuration choices with your IT staff.

Hardware and operating system

EZproxy is supported under three operating systems: Linux, Solaris, and Windows.

Linux

EZproxy for Linux requires an x86 or x86_64 distribution of Linux running a 2.2 or later kernel. To verify the version of your Linux kernel, use the command:

```
uname -a
```

The minimum recommended configuration for an EZproxy for Linux server is a Pentium II 400 with 256 MB of RAM. 10 MB of disk space is required for installation. Additional disk space is required to accommodate user authentication files and server log files.

Solaris

EZproxy for Solaris (x86) requires Solaris version 10 or later running on Intel Pentium 4 and later processors or on AMD Athlon 64 and Opteron and later processors.

The minimum recommended configuration for an EZproxy for Solaris server is not defined, although EZproxy's modest processor and memory utilization makes most systems manufactured since 1999 (and many produced prior) suitable for use.

10 MB of disk space is required for installation. Additional disk space is required to accommodate user authentication files and server log files.

Windows

EZproxy runs on all versions of Windows 7, Windows 2003, Windows 2008, and Windows XP and XP Professional.

The minimum recommended configuration for an EZproxy for Windows server is a Pentium II 400 with 256 MB of RAM. 10 MB of disk space is required for installation. Additional disk space is required to accommodate user authentication files and server log files.

Initial setup process

Notes

EZproxy is a completely stand-alone application. It does not require nor use any existing web server that is already installed on your server.

If you are already running a web server on the system where EZproxy is running, do not attempt to install EZproxy within directories that are used by that web server.

Steps

See initial-setup instructions for details and troubleshooting tips. Instructions and commands vary by platform.

Step 1. Install the software: <http://www.oclc.org/ezproxy/download.en.html>.

- Create a directory for EZproxy and make it your current directory.
- Download the ezproxy program file into this directory.
- Enter the command to rename the download file to **ezproxy** and make it executable.
- Enter the command to create the default version of needed files.
- Enter the command to verify that EZproxy can automatically detect your host name correctly and to check whether firewalls may interfere with your ability to use EZproxy.
- Use a text editor to edit the config.txt file. If suggested from the previous step, manually specify your host name in this file. The file also contains suggestions for other changes. This text editor should not introduce extra formatting when the file is saved. Notepad works fine for editing these files.
- Use a text editor to edit the user.txt file. To this file, add this line:

```
someuser:somepass:admin
```

Change *someuser* to the username you want to use for testing and *somepass* to the password you want to use for testing.

- Enter the command to start the server.
- Use your web browser to connect to your server on port 2048.

For example, if your EZproxy server was named ezproxy.yourlib.org, you would use this URL:

```
http://ezproxy.yourlib.org:2048/admin
```

- Enter the username and password that you created when you edited the user.txt file. This should bring you to the main server administration page.

Note: The options presented and how effectively they work depend on your customization of config.txt. As you make additional changes to config.txt, stop and restart EZproxy to make the changes take effect.

Step 2. Start the set up process: www.oclc.org/support/services/ezproxy/documentation/setup.en.html.

When EZproxy is working, go to the User authentication page to learn how to create URLs that link to specific databases on the EZproxy server and how to set up user authentication for your environment.

Step 3. Configure resources.

Once you have EZproxy working, the next step is to configure resources. Choose two or three resources to start with.

Step 4. Authentication.

Once you have resources working, the next step is to get your authentication component working.

Step 5. HTML if desired.

After your resources and authentication is functional, then work on updating web pages if you do not want to use the default set of pages.

Tips, hints, cautions

- Make a copy of your current EZproxy folder and save it somewhere so you can roll back if an update doesn't seem to work for you.
- Use Notepad or some other editor that doesn't automatically introduce document formatting when it is saved.
- If you are having problems connecting to a specific database, carefully look through your EZproxy config file for duplicate entries for that database vendor. Often when there are problems you can find two or more entries for the same database vendor with conflicting configuration entries.
- Remember to contact your server administrators to make sure that the DNS entries are correctly added to your servers DNS.
- Check the ezproxy.msg file for entries in this file that might point to a problem you might be having connecting to a database.
- Remember to register the IP address of your EZproxy server with any Database vendor you plan on using EZproxy with.

Additional resources

Resources are available at www.oclc.org/support/services/ezproxy.en.html to help you with:

- Initial evaluation
- Initial setup
- User authentication
- EZproxy configuration
- Database setup
- Use with OCLC services
- Troubleshooting
- Frequently asked questions

Get assistance

For questions or problems about EZproxy, contact OCLC at support@oclc.org