As with all implementations of an IT resource we need to be aware of the way our students access these resources. This FAQ outlines the way students at Scotch access paid content in the form of databases and IP authenticated subscriptions.

**WHY IS THIS IMPORTANT?**

At present, school libraries purchase subscriptions from vendors in the form of databases that help students and staff research topics from academic sources. This is a critical element of modern library services and it is important to the teaching and learning process that these sources are embedded to facilitate students’ effective study.

Once we implemented this process at Scotch our usage of the resources increased dramatically, simply because the students were not having to remember individual passwords for databases and all databases were easily accessible from home. These two factors cannot be overstated and are integral to the effective use of the digital subscriptions we have purchased.

**WHO IS THIS DOCUMENT FOR?**

This document has been created to step the IT department through the process we followed when using the OCLC EZProxy product. Basically, the following is why we selected this product:

1. EZProxy is used by almost all major universities and is a recognized international product with vendors understanding what this tool is and how it works, removing any issues with vendor support
2. EZProxy can be a local or hosted solution depending on your needs
3. EZProxy uses your own school’s methods to authenticate students and staff when accessing database subscriptions
4. Databases are set with IP address authentication which EZproxy passes to the student/staff when at home or at school - meaning they need only one username and password for 5 separate databases.

**SCOTCH COLLEGE EZPROXY IMPLEMENTATION**

1. Start by requesting an EZproxy trial key: https://www.oclc.org/content/forms/worldwide/en/ezproxy-trial.html
2. EZproxy download links and installation instructions are available from: http://www.oclc.org/support/services/ezproxy/documentation/download.en.html
3. Choose a subdomain name for EZproxy, for example Scotch has chosen db.plcscotch.wa.edu.au, db represents database but this can be anything, some schools just use ezproxy.schoolname.wa.edu.au
4. Choose whether you want to use Proxy by Port or Proxy by Hostname (http://www.oclc.org/support/services/ezproxy/documentation/portvshostname.en.html).
   We decided to use Proxy by Hostname. This allows us to run EZproxy on standard ports (80 + 443) without having to worry about restrictive firewalls (on the end user side) blocking non-standard web browsing ports. This also allows for the hostname to be consistent for each site you proxy ie http://db.plcscotch.wa.edu.au/login?url=
5. Proxy by Hostname requires you to use a Wildcard SSL certificate for your subdomain to avoid browser security warnings for users. We already had a wildcard for *.plcscotch.wa.edu.
au but as this only covers 1 level higher we had to purchase another wildcard for *.db.plcscotch.wa.edu.au. We purchase all of our certificates from GoDaddy, and with 25-35% discount coupon codes easy to find on Google, a 3 year standard wildcard SSL certificate will come to about $700AU.

When using a wildcard certificate, EZproxy will put dashes in the hostname of HTTPS sites which stops your users getting annoying certificate warnings, the West Australian archive looks like this for us:

This page explains in more detail why purchasing a dedicated wildcard certificate is recommended: http://www.oclc.org/support/services/ezproxy/documentation/cfg/ssl/certopts.en.html

6. Internal and External DNS needs to be configured - if using Proxy by Hostname and Windows DNS follow this guide: http://www.oclc.org/support/services/ezproxy/documentation/cfg/windns.en.html

Once configured correctly you should be able to resolve any subdomain of .db.plcscotch.wa.edu.au back to the EZproxy server.

7. This page explains how to generate a CSR for your provider and then import the wildcard certificate to EZproxy: http://www.oclc.org/support/services/ezproxy/documentation/cfg/ssl.en.html

I used the method of generating the CSR from IIS, if you are more comfortable doing that, follow the link here (ignoring step 1 if you have purchased a dedicated wildcard certificate): http://www.oclc.org/support/services/ezproxy/documentation/technote/6.en.html

8. EZproxy supports a variety of authentication methods, most will use Active Directory: http://www.oclc.org/support/services/ezproxy/documentation/usr/ldap_ad.en.html

We prefer to use SAML/Single Sign On when available; we use ADFS 2.0 as the identity provider. This page talks about implementation of SSO: http://www.oclc.org/support/services/ezproxy/documentation/usr/shibboleth.en.html

9. At this point EZproxy should be up and running, you can now start adding in your database subscriptions. OCLC maintains a list of stanzas that you can copy and paste into your config.txt file. https://www.oclc.org/support/services/ezproxy/documentation/db.en.html

10. The default index page can be customized by editing ezproxy\docs\menu.htm - we’ve applied our own CSS to it so that it looks a bit more presentable if users access it.

EXAMPLES OF USE


When you arrive on this page you see the first link that connects to a database. When you click this link you are thrown to EZProxy, which then authenticates your access via your school username and password. Once you enter this correctly you are passed to the database with the School IP which is the authentication method used with databases.

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