# Library Access manual

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What is Library Access?
Library Access is a browser extension that enables end-users to easily access e-resources through a proxy server (EZproxy, HAN) or through OpenAthens. When the end-user browses to a domain that is in the Library Access configuration, the browser extension redirects the end-user to the proxied URL, or offers a pop up with a link to the proxied URL.

The configuration of Library Access happens in the online dashboard of Lean Library, accessible at:

http://app.leanlibrary.com/

Library Access is configured in two or three areas, depending on whether you utilize a URL Rewriting Proxy or OpenAthens:

1. Proxy settings
2. E-Resource Domains
3. OpenAthens Settings

Eligible domains
The Library Access extension needs to know which domains to be active on. There are two requirements for eligible domains:

1. The domain needs to be proxy-able, that means that the proxy server is configured to be able to proxy that specific domain
2. The library needs to have a license on one or more e-resources on that domain. If the library doesn’t have a license on any e-resource on that domain, the proxying of the end user would be useless as it wouldn’t give the user access to the e-resource.

Because both requirements need to be fulfilled, only domains that are in area B in the figure below need to be added to the Library Access extension configuration.
Area A – Unlicensed content

In our experience we come across a lot of proxy configurations that include domains with unlicensed content (Area A). Most of the time these are domains that used to be in license, but no longer are. We call these “polluted” configurations. The issue with a “polluted” configuration is that the extension will trigger on domains with no licensed content. This gives the user the impression that the library provides access (licenses) to the content, while this is not the case.

We recommend to “clean up” the proxy configuration, before using it as a data source for the Library Access.

Area B – Licensed content & Accessible through proxy

The domains in Area B are the domains that you want to have in the Library Access configuration. They include licensed content AND they are proxy-able. The extension will trigger on these domains and provide seamless access for the end-user to the licensed content on that domain.

Area C – Licensed content, but not accessible through proxy

Area C consists of domains with licensed content, but that are not in the proxy configuration. In our experience this area is relatively small most of the time. The reason for a domain being in Area C can be:

1. The domain doesn’t support proxy
2. The domain supports proxy, but is not added to the proxy configuration by accident

While category 2 can be fixed by the library, category 1 (The domain of the publisher doesn’t support proxy) is out of the sphere of influence of the library. For domains that fall into category 1, we recommend setting up Library Assist messages.

With Library Assist you can set messages for users to help them get access. For example, you can set a message for users that are off campus and are on www.beck-online.de, a domain that does not support proxy:
Proxy Settings

The proxy configuration can be done on here:

https://app.leanlibrary.com/dashboard/account/proxy-settings/

The minimal settings that need to be configured are

1. Proxy type (currently either EZproxy or HANproxy)
2. URL of the proxy login (sometimes known as Proxy-Prefix)
3. Domain of the proxy server

Proxy Domains configuration

After the proxy configuration is done, it’s time to add proxy-able domains to the configuration. The browser extension triggers when the end-user browses to a domain that is in Proxy Domains configuration. There are two ways to configure the proxy domains: manual or automatic.
Manual configuration

The manual configuration of Library Access is quite straightforward, there are only 5 fields per entry:

1. Title (optional)
2. Domain (required)
3. Access Type (Proxy or OpenAthens)
4. Comments (internal use)
5. Access only on subdomain?
   *If this is checked, the extension will only trigger on the subdomain that is in the entry.*

For example, if this entry is in the configuration:

The extension will trigger on all subdomains of jstor.org, so on www.jstor.org but also on journalx.jstor.org. If you would like the extension to only trigger on a specific subdomain, just check the box “Access only on subdomain”.

Do disable an entry click on the “Yes” shown in the Enabled column, in the E-Resource Domain table.
Automatic Configuration with EZ-proxy

It’s also possible to automate the configuration of the Library Access extension. We’ll explain the automation of the configuration below.

Setting up the automatic import

Once the config file of your proxy is “clean” and there are no domains in the configuration that are unlicensed, it’s possible to automate the configuration of Library Access. You can automate the configuration by making the configuration file available to Lean Library through an URL, FTP, SFTP or the Proxy Status Page.

Please note that all domains that are imported from the config.txt are set to “subdomain only”

At the moment we support several different import methods.

1. Importing the config.txt from
   a. URL
   b. FTP
   c. SFTP
2. Parsing the EZ Proxy Status Page

1. URL

Library Access can download the config file from a URL, you specify in the dashboard, once every 24 hours.
2. **FTP**

Lean Library can download the configuration file from an FTP server, once 24 hours. In the dashboard you can configure this through the following fields:

- Hostname
- Filepath
- Username
- Password

3. **SFTP**

For SFTP you can either provide a username and password, as in the FTP example above, or you select to share your private key. In this case you would paste your private key into the provided form field.
4. EZ Proxy Status page integration

We “scrape” the EZproxy status page where all the domains that are proxy-able are listed. To achieve this, we will need your log in credentials (read only will suffice). This information can be found at your EZproxy service desk (https://www.oclc.org/support/contact-support.en.html), or from your own admin if you are self-hosting EZProxy.

After the log in credentials are filled in, the proxy domains will be automatically uploaded every night.
5. Manual Upload

You are also able to upload the configuration file yourself. To do so, select Manual from the import settings and then click on Select config file to select and upload the configuration file. Please note that you will need to repeat this at an interval of your choice, to keep up to date, or enable automatic updates at a later time.

Additionally, you are able to download and upload your E-Resource Domains from the E-Resources Tab in our admin dashboard. An Excel template is provided online for your convenience.

Parsing the config.txt

After our server has successfully downloaded the config.txt, we’ll parse the data contained in the file. We currently parse the following from the config.txt:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Example</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>JSTOR</td>
<td></td>
</tr>
<tr>
<td>URL</td>
<td><a href="http://www.jstor.org">www.jstor.org</a></td>
<td>If there are 2 URL lines under 1 Title, we’ll import both</td>
</tr>
<tr>
<td>HJ</td>
<td>www2.scopus.com</td>
<td></td>
</tr>
<tr>
<td>NeverProxy</td>
<td>See Elsevier</td>
<td>We parse this one and set the status to not-active in our extension, so the extension will not trigger on this URL.</td>
</tr>
<tr>
<td>DJ</td>
<td>See Elsevier</td>
<td></td>
</tr>
<tr>
<td>HOST</td>
<td>Link.worldcat.org</td>
<td></td>
</tr>
</tbody>
</table>
Recommended: Automatic – Manual Configuration

To optimize your configuration, we recommend to use an Automatic – Manual combination. What we mean by this is that you can use the config.txt as a foundation but improve upon it manually to ensure the best user experience for your patrons.

Imagine, you wanted to keep www.google.com in your config.txt.

This means that it will be added to the extension configuration and that the extension triggers when a patron goes to www.google.com. This is unwanted behavior from the extension, so we need to disable this. You can do that by going to the E-Resource Domains tab and disabling the domain www.google.com.

If you manually disable a domain, it will not be overwritten by the import. So after manually disabling www.google.com, the extension will no longer trigger on that domain, but it can remain in your config.txt.

Important: Automatic – Manual interaction

The Automatic - Manual Configuration will follow these rules:

- The config.txt is uploaded every 24 hours
- When there’s a new domain in the config.txt, it will be added to the Proxy Domains (“subdomain only” setting)
- When there’s a domain in the config.txt that is already in the Proxy Domains configuration it will not change the configuration of that domain, that gives you full control over your configuration, i.e.:
  o If you disable a domain, the extension will not trigger on it
  o If you un-check the “subdomain only” setting, the extension will trigger on all subdomains of that domain

If there’s a domain in the Proxy Domain that is no longer in the config.txt, the domain will be deleted from the Proxy Domains. This ensures that the extension does not triggers on domains that are not supported by the proxy server any longer.
Proxy Settings - Additional Settings

Do not show "Access pop-ups" when the user is ON campus

Typically, you will not want to show Access Pop-Up messages to your users, when they are ON Campus. To achieve this, check the **Do not show “Access pop-ups” when the user is ON Campus** and then ensure to select the **Method ON Campus Check**

Do not show "Access pop-ups" when the user is ON campus

- On Campus check
- Method ON Campus check

Method ON Campus check

We offer two ways to check, whether a user is ON or OFF Campus.

**Validation on IP-restricted e-resource**

When you select this option, you will be asked to provide the URL of an IP Restricted E-Resource and the text, we should expect to see on the page to indicate that the user is a recognized user. While it is possible to utilize a subscription resource, such as jstor.org, we recommend that you work with your IT department to setup a local page for this purpose.

The URL of the e-resource for ON Campus validation

https://www.jstor.org/

The response text for ON Campus validation

Access provided by

**Validation on IP-ranges (recommended)**

This is the recommended method for the ON Campus check. You will be required to type in your external IP Addresses as ranges. Imagine you wanted to setup 14.15.*.* in this case you would enter 14.15.0.0 as **Lower bound** and 14.15.255.255 as **Upper bound**

Do not try to enter ranges with asterisks, e.g. 14.15.*.* will not work
Do not try to enter ranges with hyphens, e.g. 14.15.0-255.0-255 will not work
Set standard value for auto-redirect in the extension

In this section you will determine, whether or not a user will be automatically redirected upon accessing an enabled E-Resource Domain, or whether s/he will be shown an Access Possible Pop-Up.

By setting the “Set auto-redirect value” to on, this will set the default behavior for your users. During installation and at any time thereafter, the user will be able to make their own choice form the extension settings.

If you “Disable the auto-redirect choice for end-users” the choice you’ve made above, cannot be changed by the end user.

We recommend setting the auto-redirect value to on and allow end-users to change from the Extension settings.
OpenAthens Settings

OpenAthens is a SAML based single sign on service, provided by Eduserv. We provide two support approaches.

1. Hybrid Proxy / OpenAthens
2. Fully Automated

Hybrid Proxy / OpenAthens

In this mode you will utilize the E-Resource Domains and follow all instructions in this guide, including setting up a supported Proxy Server. If you have an E-Resource Domain, for which you would like to utilize the OpenAthens Redirector, instead of your Proxy Server, edit the E-Resource Domain and select OpenAthens from Access Type, as shown below.

Do not tick the OpenAthens automatic login option in OpenAthens Settings, but make sure that both your Entity ID and OpenAthens Scope are provided. If you are uncertain about these values, you can look them up at [https://login.openathens.net/org-list](https://login.openathens.net/org-list)
Fully Automated

Please contact support@leanlibrary.com to set this up, as it requires some additional setup at Eduserv

By selecting OpenAthens automatic login and providing your Entity ID and OpenAthens Scope (see https://login.openathens.net/org-list) you will set Library Access to OpenAthens Only or OpenAthens Fully Automated mode.

In this mode the user must login via OpenAthens upon installing the extension for us to obtain a token, which will be exchanged for the user’s E-Resource Domains. The list of E-Resource Domains is tailored the user’s entitlements.

Please note that additional setup steps are required, which cannot be performed by Lean Library and therefore are not part of our dashboard. Please contact support@leanlibrary.com or your Implementation Manager to ensure we take care of these steps on your behalf and ensure the best possible OpenAthens experience.