

Trusted Proxy Configuration Guide

Trusted Proxy Configuration Guide

Literatum 14.2

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Note: Some of the features described herein are “optional,” meaning they must be enabled by Atypon before they appear in the Admin Tool or on your website. In some cases, there is an additional charge to enable optional features. For more information about specific optional features, please contact your Account Manager.

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Preface

This document describes how to set up, test, and maintain a Literatum trusted proxy.

Intended Audience

This document is intended for publisher administrators.

Prerequisite Knowledge

This document assumes familiarity with the Literatum Admin Tool.

Chapter 1. Introduction

This section gives an introduction to the Literatum trusted proxy, describing the benefits of using the trusted proxy and how it works.

The trusted proxy provides a way for your customers to authenticate their users without sharing users' username/password information with you. For example, the trusted proxy can be used by a professional society to provide content to its members, or by a university to provide faculty with remote access to online content from home. The subscribing institution's members receive access to content without having to register or remember an additional password; the trusted proxy interaction is transparent.

This guide uses the following terminology:

- **Publisher:** The entity providing online content through a Literatum platform.
- **Subscribing Institution:** A customer of the publisher, with individual members. For example, a professional society whose members log into a members-only area of the society's website, or a university whose faculty log into a faculty-only area of the university's website.
- **User:** A member of the subscribing institution with the ability to authenticate (log into) the subscribing institution. For example, a professional society's member, or a professor at a university.

1.1. Benefits of Using the Trusted Proxy

There are a number of benefits of using the trusted proxy to authenticate users:

- Users can access a publisher's content without having to go through an additional registration or login.
- Although initial installation of a trusted proxy script is required by the subscribing institution, there is virtually no ongoing technical maintenance needed.
- Publisher platforms can be configured to show the name of the subscribing institution as a web page banner when users are authenticated by the trusted proxy.
- After an initial authentication exchange through the trusted proxy on the subscribing institution's website, the user accesses content directly from the Literatum website. This results in better performance and offloads network traffic at the subscribing institution website.

1.2. How the Trusted Proxy Works

The trusted proxy enables the publisher to delegate authentication of the user to the subscribing institution. The publisher in turn authenticates the subscribing institution through its IP address. The subscribing institution specifies the URL to which the user is directed on the Literatum website if the trusted proxy authentication is successful; for example, the user is directed to a list of issues for a journal.



Note

The user must go to the link on the subscribing institution's website and use the subscribing institution's access link. The user cannot directly access the content from the Literatum website.

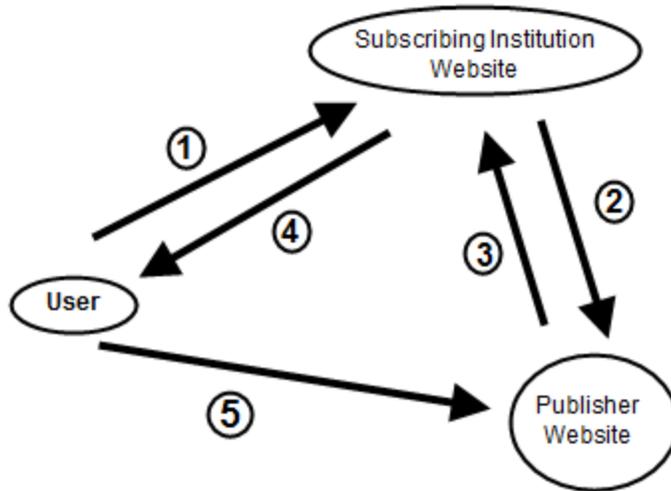


Figure 1.1. How the trusted proxy works

1. The user signs into the subscribing institution's website and clicks a link to access the publisher's content.
2. The trusted proxy script on the subscribing institution's website sends a ticket request to the publisher that will allow this user access to the requested content.
3. The Literatum website returns an authorization ticket, which includes a redirect URL to the accessible content.
4. The subscribing institution redirects the user to the Literatum website.
5. The Literatum website verifies the user's authorization and allows the user access to the content.

After the initial authentication through the proxy, the user accesses the Literatum website directly.

The authorization ticket from the publisher trusted proxy includes the redirect URL (for example, www.example.com/loi/fiwc). [Table 1.1](#) describes the components of the trusted proxy authorization ticket.

Table 1.1. Trusted proxy ticket

Return indicator	Information contained
<code>http://www.example.com/TP/authenticate</code>	Indicates that this is the authentication response.
<code>&ru=\$(ru)</code>	The redirect URL (location of content to be accessed).
<code>&ip=</code>	The IP of the subscribing institution's trusted proxy.
<code>&expireTime=</code>	The ticket expiration time.
<code>&signature=</code>	The security signature.

Chapter 2. Setting Up a Trusted Proxy

This section describes how to set up a trusted proxy. The trusted proxy functionality on the website is a part of Literatum and does not require installation of additional software. However, you (or your customer's administrator) need to create and install a trusted proxy script on the subscribing institution's server.

2.1. Getting Started

Before creating the trusted proxy script, follow these steps if they have not already been completed:

1. Create an identity for the subscribing institution that will be authenticating users.

For example, if you are a publisher that publishes the journal *Lavoisier's Head*, and the Radium Society will be providing access to that journal through their members-only web page, create an identity for the Radium Society using the Admin Tool.

2. Create an administrator for the subscribing institution.

In this example, click into the *Administrators* panel of the Radium Society identity and create an administrator identity, such as RS-Admin.

3. Gather the following information, which you need in order to set up the trusted proxy.

Table 2.1. Information required from the subscribing institution

Item	Description
Referring server IP address	The IP address of the subscribing institution's server that refers the user.
Namespace	If more than one website will be referring users from the same IP address, use a unique namespace to distinguish the referring server site from other sites using the same IP address. If not, leave the namespace blank.
Banner text	The banner for the web page (usually a greeting with the name of the subscribing institution). By default, the website displays "Welcome {subscribing_institution_name} member."
Content URL	The URL to which users will be redirected on the Literatum website.
Error URL	The URL of the error page on the subscribing institution's website to which users are directed if the authentication fails.
Test username and password	Request a test username and password on the members-only area of the subscribing institution's website. Use this to test the trusted proxy when it is set up, and to diagnose any reported problems.

2.2. Creating the Trusted Proxy Credential with the Wizard

You can create the trusted proxy credential using the trusted proxy wizard available through the subscribing institution's organization administrator's profile:

1. Log into the Literatum website as the subscribing institution administrator (e.g., RS-Admin).

2. Locate the institutional administration interface for your platform (many are found in the user profile interface).
3. Click into the *TPS Setup* panel, shown in [Figure 2.1](#)

Trusted Proxy Server (TPS) setup wizard

You are managing New Server.

Please fill in the form below and click the button below to set up your Trusted Proxy Server.

Description	Value
1. IP address (or IP range) of your institution's server: (this is the IP address from where the user will access the publisher site through TPS)	<input style="width: 100%;" type="text"/> thru <input style="width: 100%;" type="text"/> <small>(leave the second field blank if there is only one IP address)</small>
2. Domain [optional] (If the above IP address is shared with multiple web-sites, then an extra parameter 'domain' is needed to distinguish this site from the rest.)	<input style="width: 100%;" type="text"/>
3. The banner text you would like to display at the top of every page who gets access through this TPS. (Normally this is a welcome message with the name of your institution)	<input style="width: 100%;" type="text"/>
4. Full URL of the journal that you wish to grant access to (This is normally the full URL of the List of Issues page of the journal)	<input style="width: 100%;" type="text"/>
5. Full URL of an error page that users will be directed, when they fail to authenticate. (This URL is normally hosted on your web-site with an explanation of what can be done to address this problem)	<input style="width: 100%;" type="text"/>
6. Choose the programming language in which you would like us to generate the TPS code.	Java/JSP

When you press the button below, we will configure the system to setup your TPS access. The following page will generate the TPS code in the language of your choice. Then:

1. Copy this code and put it on your server as a file name. Find out the URL of this file.
2. Direct your users to the above URL to access the online content.

Set up my Trusted Proxy Server and generate code

Figure 2.1. TPS Setup panel

4. Enter the information from [Table 2.1](#).
5. Select the type of programming language/script you want to use for the script.
6. Click **Set up my Trusted Proxy and generate code**. The trusted proxy credential and script are created based on the information you have provided.
7. Copy and save the script as a file, making sure that the file name extension is correct for the type of script you have requested.
8. Provide the file containing the trusted proxy script to the person at the subscribing institution who is responsible for creating links on the website (usually the webmaster). The webmaster saves the file in a secure area, and uses the file name for the link to the accessible content.

2.3. Creating the Trusted Proxy Credential Manually

If you prefer not to use the trusted proxy wizard, you can create the trusted proxy credential manually.

Set up the trusted proxy using the Admin Tool as follows:

1. Log into the Admin Tool and click the **Identity** sidebar button.
2. Click into the *Institution* panel.
3. Find the subscribing Institution identity (e.g., the Radium Society).
4. Enter the banner from [Table 2.1](#) into the **Banner Text** field.
5. Click into the *Members* panel and click **Add**.
6. Click into the *Trusted Proxy* panel. Enter a descriptive name for the Trusted Proxy identity and enter the IP address and namespace, if any (see [Table 2.1](#)). For a single IP address, enter it into both the **Min** and **Max IP** fields.

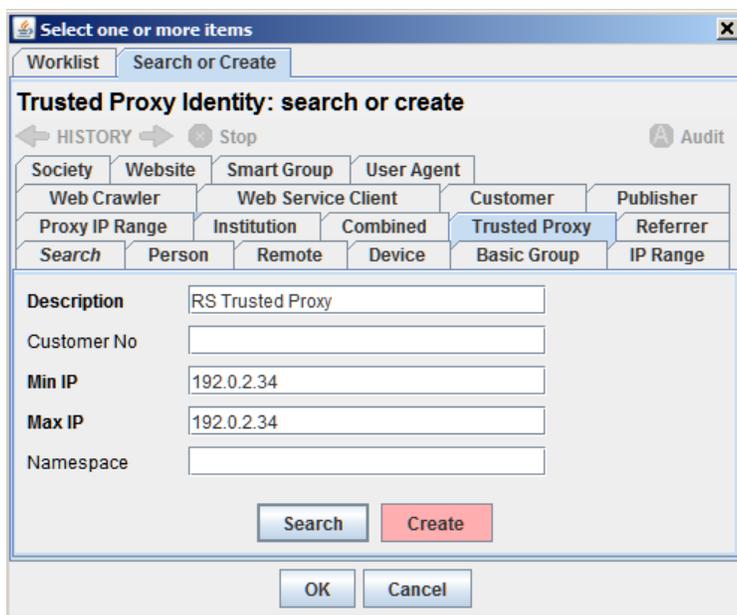


Figure 2.2. Create the Trusted Proxy identity manually

7. Click **Create**. The Trusted Proxy identity is created and added to the *Members* panel of the subscribing institution.

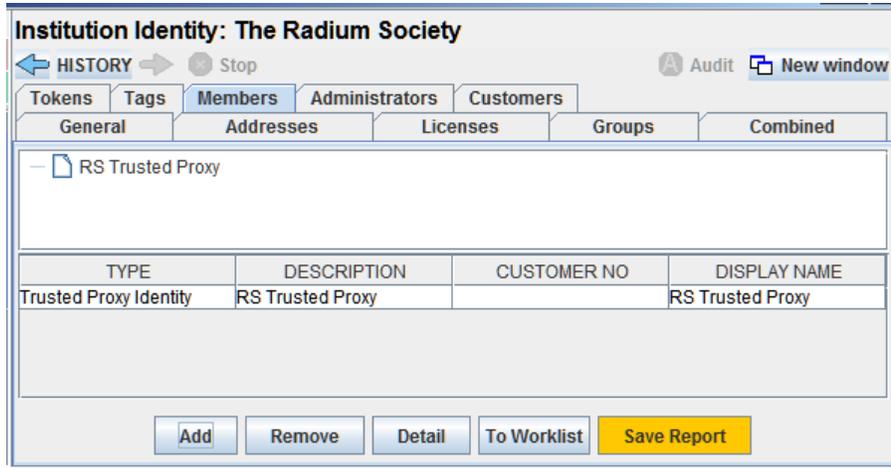


Figure 2.3. The Trusted Proxy identity member of a subscribing institution

8. Select the Trusted Proxy identity on the *Members* panel and click **Detail**. The Trusted Proxy identity record opens.

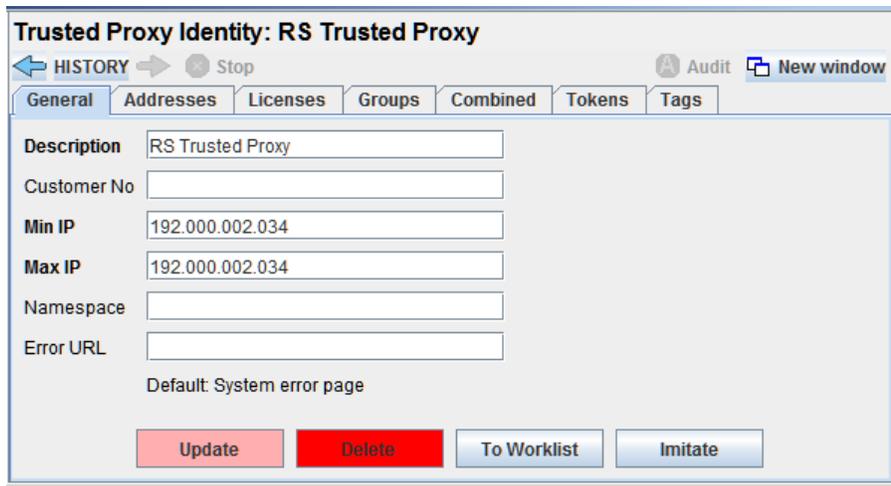


Figure 2.4. The Trusted Proxy identity record

9. Enter the URL for the error page from [Table 2.1](#) in the **Error URL** parameter and click **Update**.

In addition to configuring the trusted proxy in the Admin Tool, you must create a trusted proxy script that provides access from the subscribing institution's website, as follows:

1. Refer to the [Atypon website](#) for script templates.
2. Select a template and replace the placeholder parameters with the information from [Table 2.1](#) to create a working script.
3. Provide the trusted proxy script to the webmaster of the subscribing institution.

Chapter 3. Testing and Maintaining the Trusted Proxy

3.1. Testing the Trusted Proxy

Follow these steps to ensure the trusted proxy is working.

1. Ask the subscribing institution (in the example, the `Radium Society`) where they have installed the link to your content on their website. Ensure that the link cannot be accessed unless the user has logged into the subscribing institution's website.
2. Log into the subscribing institution's website using the test username/password they provided.
3. Try accessing content by clicking the access link.
4. Determine whether the redirect has taken you to the correct content page, and that you have access to the content.

3.2. Maintaining the Trusted Proxy

Under normal circumstances, the trusted proxy does not require any maintenance. However, if you change the location of the content being accessed through the trusted proxy, you need to generate a replacement script containing an updated redirect URL.

If you need to change the Error URL to which a user is directed when the trusted proxy authentication fails, you can edit the **Error URL** parameter in the Trusted Proxy identity using the Admin Tool.

Chapter 4. Troubleshooting the Trusted Proxy

This section contains suggestions for troubleshooting if the trusted proxy is not working as expected.

4.1. What You Can Do

- Verify that the members of the subscribing institution should have access to the content, and that the license is valid and not expired.
- Imitate the user who is having the problem, and attempt to reproduce the problem, going through the redirect link on the website to verify the behavior.

4.2. What to Ask the Subscribing Institution

There are several things you can have the subscribing institution's administrator or webmaster check that can help identify the problem:

- Ask the subscribing institution administrator to verify that the user has logged into the website successfully.
- Ask the subscribing institution administrator to verify that the user is supposed to have access to the content.
- Ask the subscribing institution administrator to verify that the link connects to the correct script.

4.3. What to Ask the User

Here are suggestions for what the subscribing institution can verify with a user:

- Ask the user whether he or she has first successfully logged into the subscribing institution's website.
- Determine whether the user is using the correct link to the trusted proxy script.
- Ask the user to access the show identities page, located at: `http://{host}/action/showIdentities` where `{host}` is the website that the user should be redirected to.
- Ask the user to read the information shown. The User Type should be set to Trusted Proxy User. The Institution User should be set to the name of the subscribing institution providing the trusted proxy. If they are not, then the user either is not going through the trusted proxy link to access the content or the script is not correctly identifying the user as coming through the link.