**EZProxy Hosted Questionnaire**

**Please return this to your Account Manager when complete.**

1. Institution Name:
2. Contact Name:
3. Technical Contact Name:
4. Contact Phone Number:
5. Contact Email:
6. Do you prefer to be contacted by email or phone?
7. Do you currently use EZProxy? **Yes / No**
   1. If so what is the version number you are using?

Not sure? See our documentation: <http://www.oclc.org/support/services/ezproxy/documentation/version.en.html>

* 1. Please supply your configuration files (user.txt, config.txt, and any files included by these files). Do not email files containing usernames and password before contacting OCLC.

AUTHENTICATION

1. What method will you use to authenticate your users? (e,g, user.txt, LDAP, SIP, Shibboleth). Please select from the following list:

<http://www.oclc.org/support/services/ezproxy/documentation/usr.en.html>

*NB. All hosted servers are UNIX therefore Windows dependent authentication types (e.g. ODBC & Windows domain authentication) are not possible.*

Required Authentication Type:

How would you like EZProxy to deal with your on-campus users:

Would you like your on-campus users to be challenged for authentication in the same way as your off-campus users? **Yes / No**

*If yes then please ignore b) and c) and skip to question 10.*

What are the external IP address range(s) of your on-campus users?

IP addresses:

Please choose one of the following two options for your on-campus usersAutologinIP: On-campus users are not challenged to authenticate and the content is still proxied. See here for more information: <http://www.oclc.org/support/services/ezproxy/documentation/cfg/autologinip.en.html>  
  
ExcludeIP: On-campus users are not challenged to authenticate, and are redirected directly to the resource rather than being proxied. This is the preferred method for on-campus access, though you will need to ensure that your on-campus IP address range(s) are registered with your providers. See here for more information: <http://www.oclc.org/support/services/ezproxy/documentation/cfg/excludeip.en.html>

Please Note: If configuring ExcludeIP then the Start Point URLs (SPUs) will be recorded in the EZProxy log files, but not the individual page request thereafter since the user will be accessing the content directly.

Required option for on-campus users:

AUTHORISATION

1. Do you require Groups configuring within your EZProxy server? See here for more information: <http://oclc.org/support/services/ezproxy/documentation/cfg/groups.en.html>

NB. Groups operate at the web site level not at the database or journal level within a website.

Groups Required: **Yes / No**

1. Users can be denied access to content based on attributes passed during authentication – is this a requirement? **Yes / No**

CONTENT

1. Please choose an institution domain name for this server. This is for the domain address used for logging in and for proxy access. The server domain name will prefix the standard Hosted EZProxy domain in this way: *inst*.idm.oclc.org where *inst* will be replaced by your selected domain name.

NB. this *inst* domain name can only include alphanumeric characters & hyphens.

Domain Name:

1. We will give you the IP address of your new EZProxy Hosted server once it is built.

*NB. You will be required to register this IP address with all of the content providers listed under item 14 below.*

1. Please list the resources you intend to proxy including any OCLC services e.g. FirstSearch WorldCat.

Please include the following information: the title of the journal or web site and the base URL (ie. the top level URL of the resource provider e.g. http://search.ebscohost.com) you use to access this Journal or web site (NB. we do not require details of individual journals).

Resource 1 Title:

Resource 1 URL:

Resource 2 Title:

Resource 2 URL:

Resource 3 Title:

Resource 3 URL:

Resource 4 Title:

Resource 4 URL:

Resource 5 Title:

Resource 5 URL:

Resource 6 Title:

Resource 6 URL:

Resource 7 Title:

Resource 7 URL:

Resource 8 Title:

Resource 8 URL:

Resource 9 Title:

Resource 9 URL:

Resource 10 Title:

Resource 10 URL:

If you have more than 10 resources to list please provide a separate list or if you are already an EZProxy customer, you could provide us with your config file.

1. To access content via your Hosted EZProxy you will need to update all of your linking URL’s to include the server domain name (see 12) as part of the Hosted EZProxy prefix.

See here for an explanation of Starting Point URL’s & how they are constructed: <http://www.oclc.org/support/services/ezproxy/documentation/concept/starting_point_url.en.html>

For example, the URL to access Oxford Journals: <http://www.oxfordjournals.org>

Would require the following URL for it to be accessed via Hosted EZProxy:  
 **https://*inst*.idm.oclc.org/login?url=http://www.oxfordjournals.org**

*Note: For security reasons EZProxy will only allow you to proxy sites we've configured for you as per question 14, so please be sure to include a comprehensive list.*

DELIVERY

1. Following the kick-off meeting between OCLC & the institution and the institution subsequently providing us with all necessary information, we will aim to have the server ready for testing within 4 weeks.
2. Updating your configuration involves a minimal amount of downtime, changes are arranged via our support ([support-uk@oclc.org](mailto:support-uk@oclc.org)) and we will liaise with you on when to apply changes.
3. EZProxy Log Files will be provided for downloading from our SCP server on a monthly basis. An email will be sent monthly to inform you when they are ready to download.

Email address to inform:

1. We’re very pleased that you have joined the EZProxy hosted service. Would you be willing to share a few reasons about why and what appeals to you with the hosted version? (i.e. Lack of resources [IT, hardware], convenience, manageability).

Reasons: