

OCLC EZproxy—Hosted or Stand-Alone Questionnaire

Please download and complete the following short questionnaire to help us better understand your current situation and needs as they relate to EZproxy. The answers to most of these questions do not place you as either stand-alone or hosted. Instead, they provide a baseline for understanding how one of these options may better meet your needs than the other. Your answers will allow us to suggest either hosted or stand-alone EZproxy and serve as a basis for a follow-up consultation about which one would be best for your institution and patrons. After you have completed all answers click the submit button to return the questionnaire.

Institution Information

Contact: _____ **Institution Name:** _____
Email: _____ **OCLC Symbol:** _____ **Phone:** _____
Address: _____ **Country:** _____

Questions by Category		YES	NO	UNSURE
Current Subscriber	1. Do you currently have a stand-alone instance of EZproxy that you are interested in moving to hosted?			
	2. Do you have a highly customized config.txt file that you wish to maintain? (For example, do you have notes about your resources, specialized log configurations, or complex groups)			
	3. Do you currently have multiple servers running EZproxy in a high availability configuration?			
Staffing	4. Does your institution have IT staff dedicated to maintaining your institutional network that is able to install and maintain EZproxy?			
	5. Does your institution have library staff familiar with EZproxy or willing to learn how it works who can make necessary configuration changes for database resources and users?			
Hardware Software	6. Does your institution have, or are you able to acquire, the hardware and software components necessary to run EZproxy yourself? (A list of the minimum requirements can be found here .)			
Security/ Network	7. Are you able to open your authentication server's firewall to OCLC?			
	8. Are you able to use SFTP (Secure File Transfer Protocol) clients, such as FileZilla, WinSCP, or others?			
Authentication	9. a. Do you have an authentication method in place that you will be using with EZproxy? (See a list of authentication methods at EZproxy Authentication) b. If yes, is this the only authentication method you will be using with EZproxy?			
Configuration	10. Do your electronic resource subscriptions change often?			
	11. a. Do you want to be able to make these changes and make them available immediately? b. If yes, would you be willing to wait up to 48 hours for your changes to be available?			
	12. a. Do you want to restrict users' ability to access to resources based on patron type? (For example, should students be able to access a different set of resources than faculty?) b. If yes, do you have any individual resources from a single database provider (such as individual journals in the Gale database) that you want to make available to some groups but not others? (For more details about groups and limitations, please see Groups .)			
Support	13. Will your institution provide test credentials to outside parties? (If you are a Hosted site, it can be helpful for members of the Hosted EZproxy team to use test credentials to troubleshoot any issue you may have.)			

Please rank, in order of importance, 1 being most important, the top three considerations that will impact whether you subscribe to hosted or stand-alone EZproxy? Please choose up to 3.

- | | |
|---|--|
| <input type="checkbox"/> University is mandating a switch to Hosted | <input type="checkbox"/> Lack of technical support at my institution |
| <input type="checkbox"/> Time it takes to make/see database changes | <input type="checkbox"/> Lack of librarian/staff expertise |
| <input type="checkbox"/> Customization of Logs | <input type="checkbox"/> No time to learn EZproxy |
| <input type="checkbox"/> Customization of Security Configuration | <input type="checkbox"/> Unable to set up infrastructure-hardware/software |

If the submit button does not work, please send this form to orders@oclc.org.

Submit