

## OCLC-Hosted EZproxy Implementation Process

Please allow five (5) to eight (8) weeks from when we receive your completed [order form](#) for the first version of your server to be available for your testing. You will then have three (3) weeks to complete testing before billing is processed and you are transitioned to ongoing customer support. During implementation, please send any questions or comments to the Hosted EZproxy implementation team at [implementation@oclc.org](mailto:implementation@oclc.org). Please be sure to include your library/institution name. For questions about ordering or billing, please contact Order Services at [orders@oclc.org](mailto:orders@oclc.org). The table below outlines the implementation process for OCLC-hosted EZproxy:

Step	Task	Owner	Notes / Other Information
1	Welcome letter sent from Order Services	Order Services	This is a basic introduction and welcome to confirm your subscription to the OCLC-hosted EZproxy service. It also includes a link to this <a href="#">implementation process document</a> and a link that <a href="#">explains what EZproxy is and what it does</a> .
2	Introductory email sent from a member of the Hosted EZproxy Implementation Team ( <a href="mailto:implementation@oclc.org">implementation@oclc.org</a> )	HEZP Imp.	This email will come from your implementation manager and it will include the domain name and the IP address of your hosted EZproxy server, as well as a recommended go-live date. Please note: it may be earlier or later than this date, depending on the complexity of your setup.
3	Optional phone call to discuss goals and reasons for moving to hosted EZproxy	HEZP Imp. / Institution	Within the first two weeks of implementation, your implementation manager will offer to hold a brief (30 minutes or less) call with you to discuss your goals and reasons for choosing the OCLC-hosted version of EZproxy. This helps us determine any special circumstances or configuration settings unique to your institution.
4	Provide your hosted EZproxy server's IP address to all content providers	Institution	The IP address of your hosted EZproxy server is outside of the range of IP addresses that you have already provided to your content providers for access, so you will need to ensure all of your content providers have registered this IP address. This should NOT replace any existing IP addresses you have on file with your providers. If you do not have this completed by the time we are ready for you to conduct testing, you may not be able to access your subscribed/purchased resources through EZproxy. Please ensure your content providers register this IP address <i>exactly as is</i> and to not enter a range but rather the exact IP address as it is listed. You may also want to inform them the IP address is for the sole use of your institution for the OCLC-hosted EZproxy service.

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5	Install and setup server	HEZP Imp.	The EZproxy server is built, and initial configurations are made.
6	Authenticate users	HEZP Imp. / Institution	Meeting the delivery date for going live with Hosted EZproxy assumes that IT resources at your institution are available on a timely basis. If your implementation manager does not receive a response back from your institution after sending repeated requests for information or action for two weeks, we will configure your server to work with <a href="#">Text File authentication</a> and move you into testing. Please note: by default, we will only configure one <a href="#">authentication method</a> for your OCLC-hosted EZproxy server.
7	Configure resources	HEZP Imp.	This includes configuring all of the resources you included in your questionnaire as <a href="#">database stanzas</a> that will be accessed through EZproxy. If you have additional resources to add during implementation, please be sure to provide the titles and URLs of those resources to your implementation manager by sending an email to <a href="mailto:implementation@oclc.org">implementation@oclc.org</a> .
8	Testing & Billing	Institution / OCLC Order Services	<p>You will have three (3) weeks to complete testing. During this time you will also want to change all links to e-resources on your institution's webpages to <a href="#">starting point URLs</a>. These pages could include but are not limited to A-to-Z lists, LibGuides, 856 links, course management systems, etc.</p> <p>PLEASE NOTE: the testing period is <i>optional</i>; if you are ready to make the service live to your users at the point where the server is ready for testing, no further action is required by OCLC, and you may proceed with making your proxy-prefixed links "live" on your web pages and other systems. Your implementation manager will check-in with you during this testing period to ensure you have all of your resources configured and things are working as expected.</p> <p>The server will be monitored 24x7x365 by Operations staff. Once the three-week testing period has ended, future requests for changes to your server should be sent to OCLC Customer Support at <a href="mailto:support@oclc.org">support@oclc.org</a>. Your institution will be billed for OCLC Hosted EZproxy once testing ends.</p>

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9	Managing EZproxy	HEZP Imp. /Institution	This includes but is not limited to: login page customizations, log files, and usage reports. More information on log files and usage reports will be sent to you during your testing period.
10	Ongoing Support	Institution / OCLC Customer Support	By default, libraries using hosted EZproxy do not have access to make changes themselves. All change requests will be made on your behalf by contacting OCLC Customer Support at <a href="mailto:support@oclc.org">support@oclc.org</a> . They will process the change within two business days of submitting your request.