### Handout #1: Order Collection from Community Zone

1. Search Community Zone for an Electronic Collection: [anything that isn’t currently in your IZ]
2. Row-action: Order
3. Purchase Type: “Recommended: Electronic Collection - Subscription”
4. PO Line Owner [pick one]
5. Top-row action: Create PO Line
6. License: [pick one]
7. Material Supplier: [pick one]
8. Access Provider: [pick one]
9. List Price: [anything except $0]
10. Fund: [pick one]
11. Acquisition Method: “Purchase at Vendor System”
12. Reporting code: [pick one]
13. Renewal – Subscription Dates [as desired]
14. Renewal Date: [as desired]
15. Renewal Reminder Period: [as desired]
16. Top-Action: “Order Now”
17. Search Institution Zone for Electronic Collection: [name of collection you ordered]

### Handout #2: Order Portfolio from Community Zone

1. Search Community Zone for an Electronic Portfolio: [anything that isn’t currently in your IZ]
2. Row-action: Order
3. Purchase Type: “Recommended: Electronic Journal - Subscription”
4. PO Line Owner “Main Library”
5. Top-row action: Create PO Line
6. Material Supplier: [pick one]
7. Access Provider: [pick one]
8. List Price: [anything except $0]
9. Fund: [pick one]
10. Acquisition Method: “Purchase at Vendor System”
11. Reporting code: [pick one]
12. Renewal – Subscription Dates [as desired]
13. Renewal Date: [as desired]
14. Renewal Reminder Period: [as desired]
15. Top-Action: “Order Now”
16. Search Institution Zone for Electronic Portfolio: [name of portfolio you ordered]

### Handout #3: Create Local Standalone Portfolio

1. Resources Menu: Add Local Portfolio
2. Creation Type: Use existing title
3. Choose Title: [select something from CZ]
4. Portfolio Type: Standalone
5. Top-row action: Save and Done
6. Repository Search: Electronic Portfolio > Keywords> [name of portfolio you selected]

### Handout #4: Activate Community Zone Collection

1. Select: Tasks > Electronic Resources – Activation – Unassigned
2. In any collection – row-action: Activate
3. Activation Wizard starts (as long as this is a CZ resource)
4. Mark Bib: Suppressed
5. Electronic Collection Proxy Enabled: No
6. Activate this electronic service: Yes
7. Make service available: No
8. Automatically activate new portfolios: Yes
9. Active from date: [as desired]
10. Active until date: [as desired]
11. Top-row action: Next
12. Proxy enabled: No
13. Top-row action: Next
14. Portfolios – Activation Type: Activate all
15. Top-row action: Next
16. Activation Summary – top-row action: Activate
17. Select: Admin Menu > Monitor Jobs - Wait for job to complete (Refresh as needed)
18. Select: Tasks > Electronic Resources – Activation – Assigned to Me
19. Find: [the collection you’re working on]
20. Row-action: Edit Resource
21. Switch tab: Additional
22. Services – Full Text – row-action: Edit
23. Service Activation Status: Available
24. Top-row action: Save
25. Top-row action: Save (again)

**TEST ACCESS**

1. Select Tasks > Electronic Resources – Activation – Assigned to Me
2. Find: [the collection you’re working on]
3. Row-action: Test Access
   1. If that action is not available: Create E-Activation Task
4. Choose one of the portfolios: Row-action: Test Access
5. Online Services page: Display in new window
6. Click the link to full text
   1. Link may not work unless you’re authenticated.

**FINALIZE ACTIVATION**

1. Select Tasks > Electronic Resources – Activation – Assigned to Me
2. Find: [the collection you’re working on]
3. Row-action: Edit Resource
4. Mark Bib: Unsuppressed
5. Additional tab: Services – Full text: Row-action: Activate
6. Back to task list: Row-action: Done