These workflows are for a library that does not set e-book holdings, handles each title manually, and mixes CZ and OCLC bibs. The guiding force behind these workflows is less getting the best bibliographic data and more a perpetual lack of time.

**Ordered from Gobi**

Bib record

* After receiving the activation email from Gobi, search for the book in the IZ
* Check the bib
	+ If the bib is a full/acceptable OCLC bib already
		- Do nothing
	+ If the bib has an OCLC number but looks like a brief bib, EITHER
		- Elect to use the CZ bib if available
			* Prefer to use the CZ bib if it has: title, author, publication info, 1 subject heading, abstract
			* If it’s truly awful, check Connexion
		- Check the OCLC number in Connexion
			* If the bib looks full, export the bib to Alma
			* If it looks brief, prefer to use the CZ bib if available
				+ If no CZ bib is available, search for a better OCLC bib or update the current OCLC bib
* If you use the CZ bib, remember to change the bib reference of the POL after replacing the bib so that the order shows in the title-level repository search

CZ Portfolio

* Once a bib has been decided on, go to the portfolio in your IZ
* Select the Link to Community button
* Select the portfolio listed for the correct e-collection if available
	+ Click next
	+ If there is no portfolio, skip to Local Portfolio section below
* Select to use CZ bib (“descriptive metadata from the community”) or current OCLC bib (“keep local descriptive metadata”)
	+ Click next
	+ Click Link to community
* Edit portfolio
	+ Make available
	+ Add any desired notes
* Find title in E-resource activation list
	+ Mark Done

Local portfolio

* If no CZ portfolio is available, edit the portfolio created by Gobi
* Use the URL in the activation email to either add a static URL OR fill in the appropriate parser parameters
	+ Prefer to use parser parameters where possible
* Activate the portfolio
* Add any notes
* Link the local portfolio to an existing e-collection (use a local/misc. collection if no vendor collection applies)
* Find title in E-resource activation list
	+ Mark Done

**Ordered outside Gobi**

Bib record

* After receiving the activation information, search for the book in the IZ
* Check the bib
	+ If the bib is a full/acceptable OCLC bib already
		- Do nothing
	+ If the bib is a local brief order bib without an OCLC number
		- Elect to use the CZ bib
			* Prefer to use the CZ bib if it has: title, author, publication info, 1 subject heading, abstract
		- If there isn’t a CZ bib, check Connexion
			* If the bib looks full, export the bib to Alma
				+ Move the portfolio to the new bib
			* If it looks brief, prefer to use the CZ bib if available
		- Delete the empty brief order bib
* If you change the bib, remember to change the bib reference of the POL after replacing the bib so that the order shows in the title-level repository search

CZ Portfolio

* Once a bib has been decided on, go to the portfolio in your IZ
* Select the Link to Community button
* Select the portfolio listed for the correct e-collection if available
	+ Click next
	+ If there is no portfolio, skip to Local Portfolio section below
* Select to use CZ bib (“descriptive metadata from the community”) or current OCLC bib (“keep local descriptive metadata”)
	+ Click next
	+ Click Link to community
* Edit portfolio
	+ Make available
	+ Add any desired notes
* Find title in E-resource activation list
	+ Mark Done

Local portfolio

* If no CZ portfolio is available, edit the portfolio created by Gobi
* Use the URL in the activation email to either add a static URL OR fill in the appropriate parser parameters
	+ Prefer to use parser parameters where possible
* Activate the portfolio
* Add any notes
* Link the local portfolio to an existing e-collection (use the Local E-Journals collection if no vendor collection applies)
* Find title in E-resource activation list
	+ Mark Done