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