CARLI eResources

SELECTION SYSTEM

Library Edition

- System overview

- Adding Subscriptions

    - Cycle invoicing

    - One-time purchases

- Management tools

- The selection system allows libraries to see pricing and make commitments for CARLI-brokered e-resources

- CARLI-brokered resources are offered on three different cycles:
  - Fiscal year – for agreements that run July-June; system open to libraries in the Spring, usually in April and May
  - Calendar year – for agreements that run January-December; system open to libraries in the Fall, usually October and November
  - One-Time Purchases – always open to libraries for adding purchased selections

- Tip: The selection system should work in any web browser, but if something isn't working as expected, trying a different browser may help. Send any issues to support@carli.illinois.edu

- Sign into the system: https://select-library.carli.illinois.edu/
  - CARLI provides access credentials to the library staff member designated as the E-Resources Contact in the CARLI member database
  - Any additional users should be requested by the library director or e-resources contact. Requests should be sent to support@carli.illinois.edu
  - Read-only accounts are also available
- To access the system for the first time, or if you've forgotten your password, click "I don't know my password" to (re)set it

CARLI | E-Resource Brokering

MY PRODUCTS	ADD SUBSCRIPTIONS	ADD ONE-TIME PURCHASES	REPORT	NOTIFICATIONS	IP ADDRESSES	MANAGEMENT

Abraham Lincoln Presidential Library and Museum's Products

This page lists all of the products that your library's patrons currently have access to through CARLI. If your library is not able to access any one of these items, please contact CARLI.

Jump to:
Calendar Year 2020
Fiscal Year 2020
SFX Maintenance 2020
Calendar Year 2019
Fiscal Year 2019
SFX Maintenance 2019
Calendar Year 2018
Fiscal Year 2018
Calendar Year 2017
Fiscal Year 2017
SFX Maintenance 2017
Calendar Year 2016
Fiscal Year 2016
Calendar Year 2015
Fiscal Year 2015
One Time Purchases
Past Subscriptions

Add one-time purchases and view previous purchases

Navigate to your selections from previous cycles

View a record of communications sent via the selection system, including estimates and invoices

Alert CARLI staff to IP changes, request accounts for administrative users, and add read-only accounts

Generate reports of selections from one or more cycles

The OPEN! icon indicates a cycle is open for selections.

After clicking the Add Subscriptions tab, choose the appropriate cycle.

Note the current cycle will be highlighted in purple.

Calendar Year 2021

WORK WITH ANOTHER CYCLE

Each database selected through the CARLI Database Brokering Program constitutes a financial commitment for the period through Invalid date. It is strongly encouraged that final database selections be reviewed and authorized by the appropriate individuals in the selecting library.

For selections to be saved and recorded libraries must click on "Review" before selections are complete.

SELECT | REVIEW | COMPLETE

SELECT LAST YEAR'S SUBSCRIPTIONS ✔

Product ▲	Selected Last Year	Vendor ⬍	CARLI ⬍ Funded	Price ⬍
19th Century British Pamphlets Annual Access Fee		JSTOR		
19th Century British Pamphlets Archive Capital Fee		JSTOR		
ACM Digital Library		Association for Computing Machinery		
CARLI Product 1	✔	CARLI Test Vendor		$50.00
CARLI Product 2		CARLI Test Vendor		$75.00

By default, all available products are listed alphabetically.

The list can be sorted using the arrows at the top of the column.

Products that were selected in the previous year's cycle will have a ✔ in the Selected Last Year column.

To get more info on a product, click the carrot next to the product name to expand the description.

⌄ CARLI Product 1		✓	CARLI Test Vendor		$50.00

Product Website
www.carli.illinois.edu

Product Description
A great product that your patrons are sure to love!

Vendor Pricing Comments

Users	Comment

Last Year's Pricing

Users	Price
Site License	$50.00

Comments:

Specific Terms	Year	Subscribers
Download:	2021	0 Current
ILL:	2020	1
Course Packs:	2019	-
Print:	2018	-
Limited Sharing for Scholarly Purposes:	2017	-
Use by Walk-ins:		
E-Reserves:		

Redacted License Agreement(s)

Site License $50.00	○
1 Simultaneous Users $5.00	○
2 Simultaneous Users $10.00	○
3 Simultaneous Users $15.00	○

Most products have only site license pricing, but this product also has options for simultaneous users. If pricing isn't given, click Ask CARLI to request pricing.

ASK CARLI ?

The product description page also includes vendor contact information, specific terms from license agreements, and a link to the PDF of the redacted license agreement(s) when available.

Selections can be added in 2 ways:

Clicking Select Last Year's Subscriptions will select all products that were selected in the previous year. If you select this option, you can still add and remove individual products after clicking this button. If you have made individual selections before clicking, doing so will reset your selections.

Products can also be added individually by expanding the product description and selecting the appropriate price option.

MAKING SELECTIONS

Product	Selected Last Year	Vendor	CARLI Funded	Price
❯ CARLI Product 1	✓	CARLI Test Vendor		$10.00
❯ CARLI Product 2		CARLI Test Vendor		$75.00

All changes saved automatically		TOTAL	$85.00
EXPORT			REVIEW ▶

Selected products will have their price listed in green.

At the bottom of the product list the total price will change as selections are added and removed.

Note that changes on this screen are saved automatically; if you leave the system and come back, your selections will remain. Selections are considered final even if you do not move through the next steps to review and finalize.

When your selections are complete, click Review.

Selections can be removed individually or collectively:

REMOVE SELECTION ✖

Individual products can be removed from selections by clicking the Remove Selection button under the product pricing options.

CLEAR SELECTIONS ✖

To clear all current selections, click the Clear Selections button at the top of the product list.

REMOVING SELECTIONS

On the Review page you can easily review all selected products and export a list.

Changes can be made by clicking Change Selections to return to the selections page.

Note that pricing given is an estimate, and final prices may have minor variations.

After verifying selections, click Complete.

REVIEWING SELECTIONS

Upon completion, the view for CARLI staff will display as "Selections Complete." This helps to track who is still working on selections.

Changes can still be made by clicking Change Selections anytime before the cycle closes.

Before the cycle is closed, CARLI staff will send estimates of your selections. Please review these estimates to verify selections and make any needed changes before the cycle closes.

COMPLETING SELECTIONS

Once CARLI staff close a fiscal or calendar year cycle:

- CARLI staff will generate estimates from your selections

  - Estimates are sent to the library billing contact(s)

- Please review this estimate; it is your last chance to make changes before subscriptions are sent to vendors

- CARLI staff send lists of subscriptions to vendors

- Final invoices are sent to libraries after the beginning of the fiscal year (July 1) or calendar year (January 1), depending on the cycle

- All estimates and invoices sent to billing contacts are also available via the Notifications tab in the selection system.

One-Time Purchases

One-time purchases are available year-round, even when the other cycles are closed.

The process for selecting one-time purchases is the same as for subscriptions.

Select the appropriate products and move through the steps to Review and Complete selections.

Please email CARLI support at support@carli.illinois.edu to alert CARLI staff to your selection

These tools are available year-round, even when no selection cycle is open.

MY PRODUCTS

My Products tab - lists selections and price totals by cycle. You can export your selection lists and see the pricing for products that were offered, but not selected.

REPORT

Report tab - allows for exports of selections by cycle. You can choose to export data from one or more cycles. Select multiple cycles by holding down the Ctrl key.

NOTIFICATIONS

Notifications tab - a one-stop shop for getting estimates and invoices sent by CARLI staff. These communications are e-mailed to the billing contact(s) for each institution and are also available here.
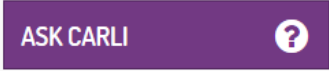
IP ADDRESSES

IP addresses - see and edit IP addresses that CARLI has for your institution. Any saved changes will create a ticket to CARLI support. IP updates can also be sent directly to support at support@carli.illinois.edu

MANAGEMENT

Management tab - see your CARLI membership information and your institution's Selection System accounts. Request additional administrative accounts via the Contact CARLI link. The "invite colleagues" option will create view-only accounts for the entered e-mail addresses.

If you have any questions or problems using the Selection System, just click **ASK CARLI** ❓ in the system, e-mail us at support@carli.illinois.edu, or call us:

Jenny Taylor – 217-265-8437

Nicole Ream-Sotomayor – 217-300-4316

Katrina Little – 217-244-7753