

The New CARLI Selection System: Library Instructions

Why a New System?

- ❖ CARLI has been using a locally built relational database to track pricing and subscriptions since 2004. The underlying software is no longer available and we have only one developer that is able to work with it.
- ❖ The CARLI e-resources brokering program has continued to grow (in 2015 we offered 514 different databases and managed 2,878 subscriptions worth more than \$13 million) but the staff supporting it has not (5 FTE).
- ❖ The current process of submitting, reviewing and offering products is very labor-intensive for both vendors and CARLI staff.
- ❖ The process of doing new licenses is increasingly complicated and we wanted a way to maximize the licenses we currently offer, meaning offering more products.

Basics to know when you are working in the new system

- The system should function as described and shown here. If you see anything else or have questions please send an email message to support@carli.illinois.edu or call one of the CARLI staff listed in slide #.
- This presentation will focus on the features of the new system that are available now. There are additional features which will be usable when the system goes live. We will list these at the end of the presentation.
- At the end of these slides you will find the URL for a brief survey for you to complete once you have made your selections. Your feedback is very important to us and will help shape the final product we make available to all of our members. Please take the time to complete the survey.

Getting into the new system

Here is the URL for the new system:

<http://select-library.carli.illinois.edu>

Here is what you will see:



The screenshot shows the login interface for the CARLI E-Resource Brokering system. At the top, there is a purple header with the CARLI logo and the text "E-RESOURCE BROKERING". Below the header, there are two input fields: "Email" and "Password". Below the "Password" field, there is a link that says "I don't know my password". To the right of the input fields, there is a "LOGIN" button.

Your login and password were sent to you in an email message. As with the current system, CARLI provides access credentials to the library staff member designated as the E-Resources Contact in the CARLI members database. Because access to the selection system gives staff the power to make significant financial commitment for the institution, access for additional staff should be determined by the Library Director, rather than CARLI staff.

The new system will track who made selections and when, so it is important that any staff that will be working in the system have their own individual access credentials. If additional credentials are needed please send an email message to support@carli.illinois.edu to request them. Please provide the additional staff member's email address as that will be used for their credentials.

Once logged in you will be on your 'My Products' page

Important things to note on this page:

- 1) Like your current CARLI member page, the system will show selections made during the last two selection cycles and one-time purchases made through CARLI.
- 2) You can also use the "Jump to" links to move to information about a specific cycle.
- 3) When a cycle is available to you the tab for "Add Subscriptions" will have the purple bubble with "Open".
- 4) If you need to know the price for a product you were offered but did not select, you can view upgrades and unselected products from previous cycles from this screen.

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

University of Illinois at Urbana-Champaign'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:
[Link to Fiscal Year 2015](#)
[Link to Calendar Year 2015](#)
[Link to One Time Purchases](#)

Fiscal Year 2015

Product	Vendor	License Agreement	Comments	S.U.	Cost
TOTAL					\$0.00

EXPORT **VIEW UPGRADES AND UNSELECTED FISCAL YEAR 2015 SUBSCRIPTION PRODUCTS** **ASK CARLI ?**

Calendar Year 2015

Product	Vendor	License Agreement	Comments	S.U.	Cost
TOTAL					\$0.00

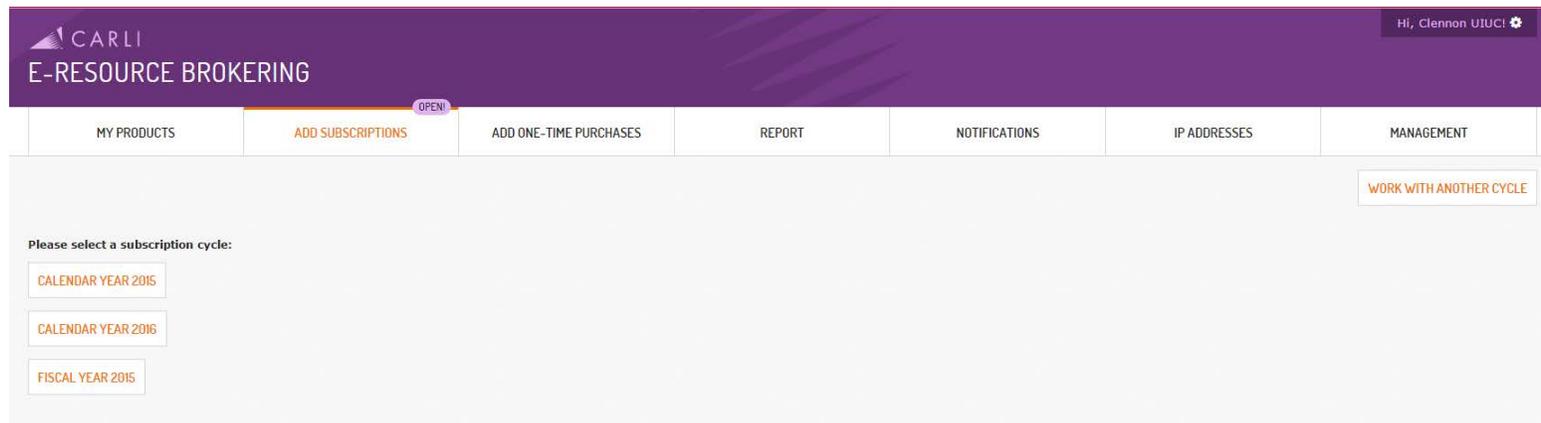
EXPORT **VIEW UPGRADES AND UNSELECTED CALENDAR YEAR 2015 SUBSCRIPTION PRODUCTS** **ASK CARLI ?**

One Time Purchases

Product	Vendor	License Agreement	Comments	S.U.	Cost
Asian Film Online	Alexander Street Press	Alexander Street Press Streaming Video		Site License	\$0.01
Asian Film Online: Volume II	Alexander Street Press	Alexander Street Press Streaming Video		Site License	\$0.01

Let's Look at the 'Add Subscriptions' tab

- By clicking on 'Add Subscription' you will be taken to this screen that allows you to select the subscription cycle. You will select the upcoming cycle. In the case of this first use, it will be FY17.

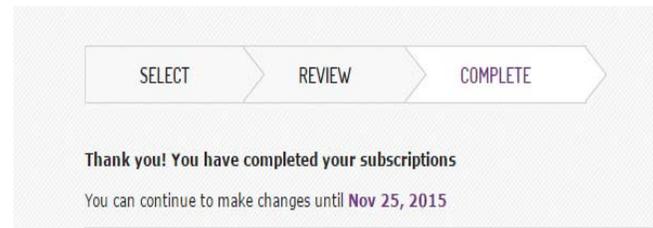


- If you try to select a cycle that is not currently open you will see the message "Subscription selections are currently closed for this cycle."

Making Selections

Once a cycle is selected you are taken to the list of available products. This list can be sorted by product or vendor name.

There is a progress bar at the top of the page to help you remember where you are in the selection process.

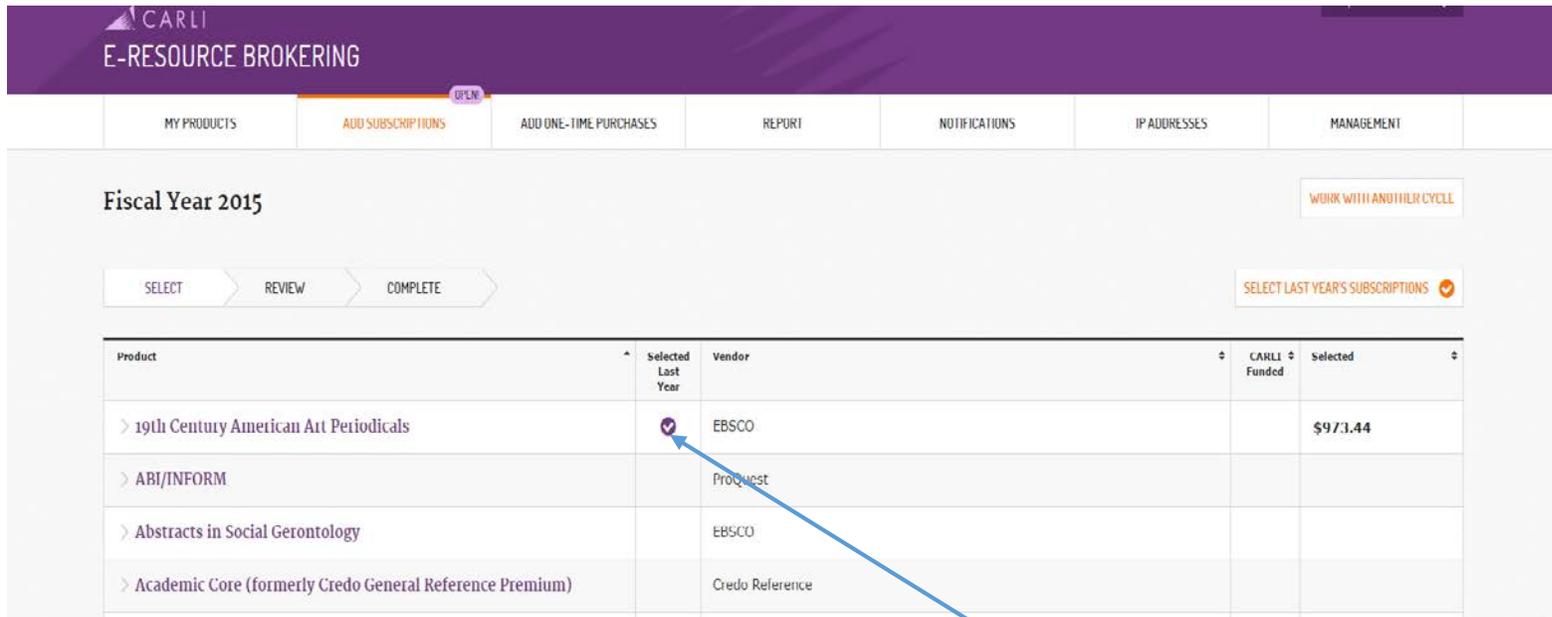


You can add or delete selections at any time and as many times as needed while the cycle is open. As shown here, you will be able to see the closing date.

If the select arrow is not white, scroll to the bottom of the product offerings and click on 'Change Selections'. This will allow you to make changes or additions.

Product and Offering Information

A system of blinds is used to provide access to the product information. Here is an example of closed blinds:



The screenshot shows the CARLI E-Resource Brokering interface. At the top, there is a purple header with the CARLI logo and the text 'E-RESOURCE BROKERING'. Below the header is a navigation bar with several tabs: 'MY PRODUCTS', 'ADD SUBSCRIPTIONS' (highlighted in orange), 'ADD ONE-TIME PURCHASES', 'REPORT', 'NOTIFICATIONS', 'IP ADDRESSES', and 'MANAGEMENT'. The main content area is titled 'Fiscal Year 2015' and includes a 'WORK WITH ANOTHER CYCLE' button. Below this, there are three steps: 'SELECT', 'REVIEW', and 'COMPLETE'. A 'SELECT LAST YEAR'S SUBSCRIPTIONS' button with a checkmark icon is also present. The main table has the following columns: Product, Selected Last Year, Vendor, CARLI Funded, and Selected. The table contains four rows of product information. A blue arrow points to the checkmark in the 'Selected Last Year' column for the first row.

Product	Selected Last Year	Vendor	CARLI Funded	Selected
> 19th Century American Art Periodicals	<input checked="" type="checkbox"/>	EBSCO		\$973.44
> ABI/INFORM	<input type="checkbox"/>	ProQuest		
> Abstracts in Social Gerontology	<input type="checkbox"/>	EBSCO		
> Academic Core (formerly Credo General Reference Premium)	<input type="checkbox"/>	Credo Reference		

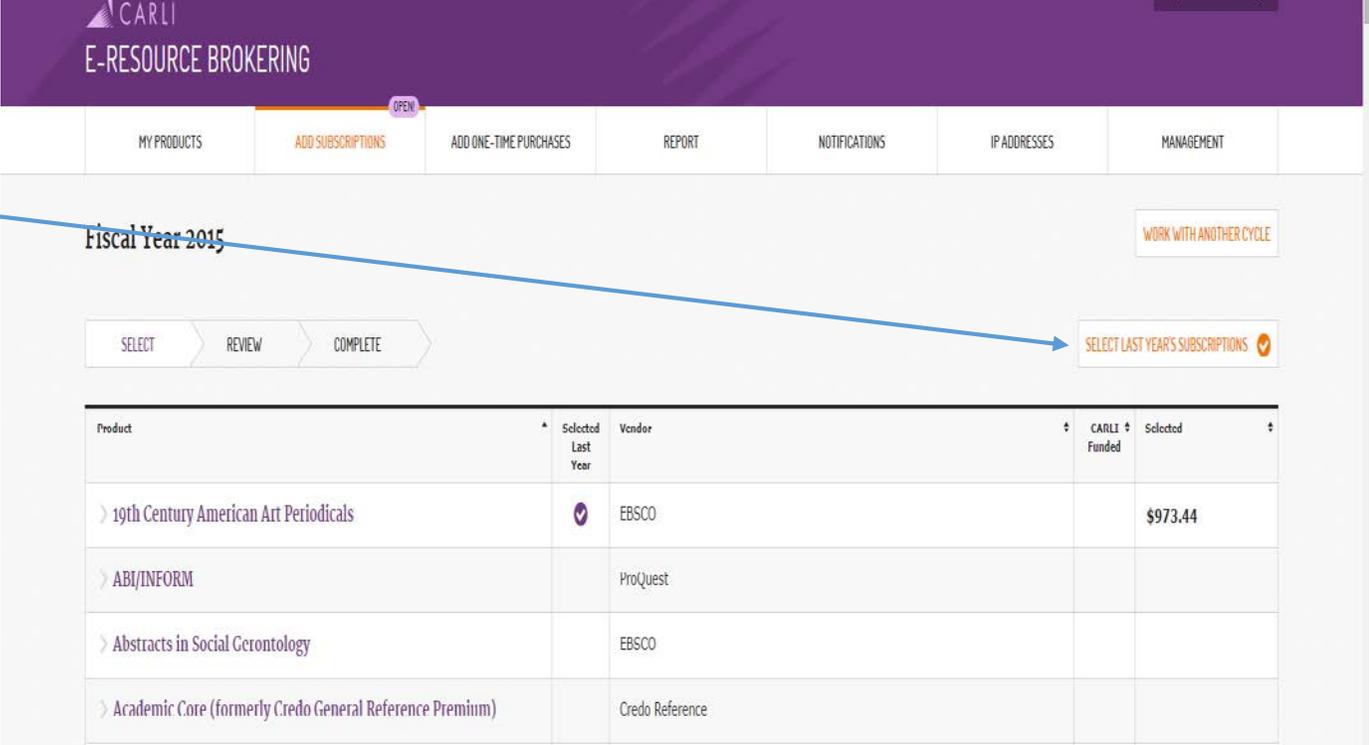
The default setting is alphabetical by product. But you can change this to allow sorting by vendor as well.

Here you can readily see your current subscriptions in the “Selected Last Year” column.

'One Click' Renewals

There is a button on the screen for 'Select Last Years Subscriptions'. Clicking on this will, as the name implies, renew all of the products you had last year. This is a good place to start and you can add to or delete from that list.

We are not yet sure how the new system will manage products with name changes, so for this initial use please review this list carefully.



The screenshot shows the CARLI E-Resource Brokering interface. The top navigation bar includes 'MY PRODUCTS', 'ADD SUBSCRIPTIONS' (with an 'OPEN' tooltip), 'ADD ONE-TIME PURCHASES', 'REPORT', 'NOTIFICATIONS', 'IP ADDRESSES', and 'MANAGEMENT'. Below the navigation bar, the 'Fiscal Year 2015' is displayed, along with a 'WORK WITH ANOTHER CYCLE' button. A progress bar shows 'SELECT' (active), 'REVIEW', and 'COMPLETE'. A blue arrow points from the text on the left to the 'SELECT LAST YEAR'S SUBSCRIPTIONS' button. Below the progress bar is a table of products.

Product	Selected Last Year	Vendor	CARLI Funded	Selected
> 19th Century American Art Periodicals	<input checked="" type="checkbox"/>	EBSCO		\$973.44
> ABI/INFORM	<input type="checkbox"/>	ProQuest		
> Abstracts in Social Gerontology	<input type="checkbox"/>	EBSCO		
> Academic Core (formerly Credo General Reference Premium)	<input type="checkbox"/>	Credo Reference		

Product and Offering Information (cont.)

There is a wealth of product information which has been brought together in one location:

- the vendor product URL
- a product description
- any pricing comments which apply to all libraries
- If your library has subscribed in the last 5 years there will be an orange circle with a check mark by the appropriate year.
- the costs for the various pricing options (if applicable)
- a link to the redacted license agreement

Here is an example of an open blind

ABI/INFORM ProQuest

Vendor Website

Product Description

Vendor Pricing Comments

Comments:

Specific Terms

Specific Terms	Your History	Subscribers
Download: Yes	2015	7 Current
File: Single copy	2014	8
Course Packs: a reasonable portion	2013	8
Print: Yes	2012	7
Limited Sharing for Scholarly Purposes: No	2011	8
Use by Walk-ins: Yes		
E Reserves: a reasonable portion		

Site License \$9,485.00

Redacted License Agreement(s)

ProQuest%20Contract%20REP%201JXS1602%20(June%2030%202025).pdf

ASK CARLI ?

More on Product Name Changes

CARLI and our vendors have worked hard to update and normalize the product names shown in our system. Many of the name changes look like this:

ABI/INFORM Global (formerly ABI/INFORM)	ProQuest
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with the former name being listed parenthetically. This work has also been done to ensure that when you click on the product URL shown in the system that it will take you to the vendor product page for a product with the same name.

Making Your Selections

Here is an example of a product with SU pricing options. They appear below the site license price.

Art Index Retrospective EBSCO

Vendor Website Comments:

Product Description

Vendor Pricing Comments

Specific Terms	Your History	Subscribers
Download: Yes	2015	1 <i>Current</i>
ILL: Single copy	2014	-
Course Packs: No	2013	0
Print: Limited number	2012	0
Limited Sharing for Scholarly Purposes: No	2011	-
Use by Walk-ins: Yes		
E-Reserves: Yes		

Redacted License Agreement(s)

EBSCO Sole Source Databases (06 30 2017).pdf

8 Simultaneous Users \$2,346.00

4 Simultaneous Users \$2,011.00

1 Simultaneous Users \$1,337.00

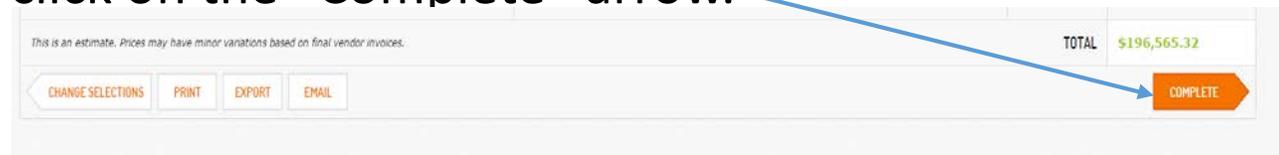
ASK CARLI ?

Completing Your Selections

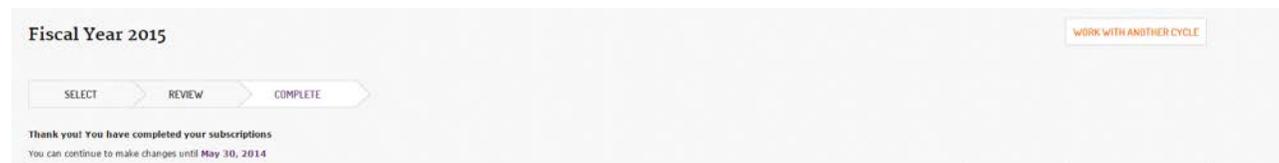
Once you have made all of your selections please click on the “Review” arrow at the bottom of the page for a summary of your FY17 selections.



You will be presented with the list of selected products. When you have completed your review, please click on the “Complete” arrow.



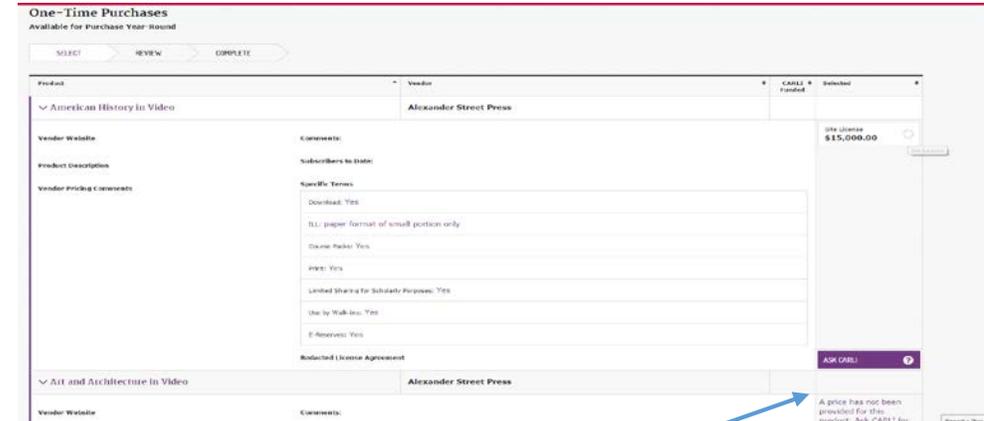
Once you have done this the progress arrows at the top of the page will look like this:



Steps for Adding One-Time Purchases

You will follow the same steps to add a one-time purchase. Because these offers are available all of the time (unless a comment indicates otherwise) this part of the system will always be available to you.

- 1) Go to the 'Add one-Time Purchases' tab
- 2) Select the Product and open the blind.
- 3) Click on the circle next to the price to add it. If you see that pricing for a product has not been provided for your library, you can click on the 'Ask CARLI' button to request pricing.
- 4) Review your selections.
- 5) Click on 'Complete' to indicate that you are finished adding products.



Other Features: Options for Generating Reports

The new system allows you to access reports in 2 ways:

- 1) From your 'My Products' page there are export buttons after each year's subscription list. This CSV report will reflect the selections you have made for that period.
- 2) From the Reports tab, you can generate reports of your selected products for single or multiple years.

Calendar Year 2016

Product	Vendor	License Agreement	Comments	CU	Cost
ACS Academic Cote +	American Chemical Society	American Chemical Society eJournals		Site License	\$23,705.00
Arts & Sciences II Annual Access Fee	JSTOR	JSTOR Collections		Site License	\$1,000.00
Arts & Sciences III Annual Access Fee	JSTOR	JSTOR Collections		Site License	\$1,300.00
Arts & Sciences V Annual Access Fee	JSTOR	JSTOR Collections		Site License	\$1,200.00
Arts & Sciences VII Annual Access Fee	JSTOR	JSTOR Collections	This AAF has been adjusted to reflect participation in 4 additional Arts & Sciences collections. Should that number decrease this AAF may increase.	Site License	\$500.00
Arts & Sciences VIII Annual Access Fee	JSTOR	JSTOR Collections		Site License	\$1,000.00
Biological Sciences Annual Access Fee	JSTOR	JSTOR Collections		Site License	\$1,200.00
Project Muse Arts & Humanities	Johns Hopkins University Press	Johns Hopkins University Press		Site License	\$3,816.00
TOTAL					\$33,821.00

EXPORT VIEW UPDATES AND UNSELECTED CALENDAR YEAR 2016 SUBSCRIPTION PRODUCTS

ASK CARLI ?

CARLI E-RESOURCE BROKERING

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

Report

Choose a cycle and year to generate a report

Note that Fiscal and Calendar Year only reflect CARLI Subscriptions Cycles, not all purchases from a given Fiscal or Calendar year.

Select Cycle(s)

- One Time Purchases
- Fiscal Year 2016
- Fiscal Year 2015
- Fiscal Year 2014

DOWNLOAD CSV Please choose a cycle

Additional Features which will be available in the months ahead

- “Ask CARLI” buttons throughout the system to link you directly to the CARLI ticketing system.
- Notifications – to allow you to customize how and when you receive information from CARLI.
- Managing IP ranges – to give you a place to update CARLI on changes to your IP range.
- Management – to allow you to generate access credentials for staff in your library and facilitate “read only” access for staff that need the information but are not involved in making commitments for your library.

Need More Help?

If you have any questions or problems using the system please send a note to support@carli.illinois.edu or call us:

Cindy Clennon at 217-333-4895

Mary Burkee at 217-244-5026

Katrina Little at 217-244-7753

Let Us Know What You Think

Please take a few minutes to complete a short survey about your experiences with the new system. You can find the survey at:

<https://www.surveymonkey.com/r/V23MK2V>

Thank you!