• **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 works best in the Chrome browser and will also work in Firefox. It will not work in IE.
• 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

• E-mail logins are case sensitive
• 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
# Library Dashboard

- **Navigate to your selections from previous cycles**
- **Add one-time purchases and view previous purchases**
- **Generate reports of selections from one or more cycles**
- **Alert CARLI staff to IP changes, request accounts for administrative users, and add read-only accounts**
- **View a record of communications sent via the selection system. These are usually estimates and invoices and are only available to the library billing contact(s)**

## 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
The 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.
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.

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).
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 descriptions and selecting the appropriate option.

After a product has been selected, it can be removed by clicking under the pricing options.
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.
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.
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.
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.
These tools are available year-round, even when no selection cycle is open.

**MY PRODUCTS**
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**
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**
The Notifications tab is 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 (to billing contacts only).
Here you can see the IP addresses that CARLI has on file for your institution and make changes. Any saved changes will create a ticket to CARLI support. (Note that IP updates can also be sent directly to support at support@carli.illinois.edu)

Here you can 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 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