THE CARLI SELECTION SYSTEM: LIBRARY INSTRUCTIONS
Basics to Know About the CARLI Selection System

CARLI brokered resources are available on three different cycles:

- **Fiscal Year** - this is for agreements that run from July through June. The system is generally open to select products on this cycle between mid-April and the end of May.
- **Calendar Year** – this is for agreements that run from January to December. The system is generally open to select products on this cycle between mid-October and late November.
- **One-Time Purchases** – this section of the selection system is always open to you to add purchased selections.

The selection system is the central repository for all CARLI-brokering information dating back to FY10. Information from prior cycles can be requested at support@carli.illinois.edu.

The selection system was created using Chrome and we highly recommend all users utilize Chrome when making selections. Other browsers that will work are Firefox and Safari, but Safari users may encounter some display issues. The system will not work in IE.

Throughout the system you will see ‘Ask Carli’ buttons. Use this to ask any questions you have about the selection system or products. CARLI staff will respond shortly thereafter. If you have questions about CARLI brokered resources at any other time you can always send a note to support@carli.illinois.edu for assistance.
Getting into the CARLI Selection System

Here is the URL for the new system:

http://select-library.carli.Illinois.edu

Here is what you will see:

CARLI provides access credentials to the library staff member designated as the E-Resources Contact in the CARLI member 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.

Returning users should already have access credentials. If you cannot remember your password, click on “I don’t know my password” and you will receive an email message to reset your password. If there is any question about whether you are an authorized user please send a note to support@carli.illinois.edu and we will verify your status in the system.

Before new users can log into the selection system CARLI staff will need to add them to the system as an authorized user. Please send a note to support@carli.illinois.edu to request this.

Please note that your email address and password are both case-sensitive so please enter this information carefully.

The selection system tracks 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
This page displays selections made during the last 4 selection cycles (both FY and CY) and one-time purchases made through CARLI.

Important things to note on this page:

• You can also use the “Jump to” links to move to information about a specific cycle.

• When a cycle is available to you the tab for “Add Subscriptions” will have the purple bubble with “Open”.

• 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.
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.

- 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 default setting is alphabetical by product. But you can change this to allow sorting by Vendor, CARLI funded or Selected as well.

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

Here is an example of an open blind:
‘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.

Vendor may change product names so please review this list carefully.
More on Product Name Changes

CARLI and our vendors work hard before each cycle to update and normalize the product names shown in our system. Many of the name changes look like this:

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 selection 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. When the product blind is open they appear below the site license price.
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 selections.

You will be presented with the list of selected products. When you have completed your review, please

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 years 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.
Let’s Take a Look at the Notifications Tab

The Notifications tab provides a record of all communications sent to your library through the selection system.

Most often this will be estimates and invoices.

You can view and copy these by clicking on “View attachment content”.
Let’s Take a Look at the IP Addresses Tab

This tab provides you with a way to notify CARLI of changes in the IP ranges for your institution.

When you have updated this information click on ‘Save’ and the system will send an email message notifying CARLI staff that a change has been made.
The final tab is Management

This tab provides several types of information:

- **Membership Information** – this section displays your current CARLI membership status, your current membership fee, your status as an I-Share member and the I-Share membership fee (if applicable). This information is being pulled from the CARLI members database and cannot be modified by the library.

- **User Information** – this section displays the staff in your library that are authorized users and the email address used to set up their access. There is also a button labelled “Invite A Colleague” to allow others in your library to have read-only access to the selection system.
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
Jenny Taylor at 217-265-8437
Katrina Little at 217-244-7753