



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



CARLI | E-Resource Brokering

Email

Password

I don't know my password

LOG IN

- 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



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

Navigate to your selections from previous cycles

Add one-time purchases and view previous purchases

Generate reports of selections from one or more cycles

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)

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

The screenshot shows the CARLI E-Resource Brokering interface. At the top, the CARLI logo and 'E-Resource Brokering' text are displayed. Below this is a navigation bar with several tabs: 'MY PRODUCTS', 'ADD SUBSCRIPTIONS', 'ADD ONE-TIME PURCHASES', 'REPORT', 'NOTIFICATIONS', 'IP ADDRESSES', and 'MANAGEMENT'. The 'ADD SUBSCRIPTIONS' tab is highlighted with a purple border and a small purple 'OPEN!' icon above it. To the right of the navigation bar is a button labeled 'WORK WITH ANOTHER CYCLE'. Below the navigation bar, the text 'Please select a subscription cycle:' is followed by three radio button options: 'CALENDAR YEAR 2021', 'CALENDAR YEAR 2020', and 'FISCAL YEAR 2020'. The 'CALENDAR YEAR 2021' option is highlighted with a purple border. A blue arrow points from the 'OPEN!' icon to the 'ADD SUBSCRIPTIONS' tab, and another blue arrow points from the 'CALENDAR YEAR 2021' option to the text below.

OPEN!

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

WORK WITH ANOTHER CYCLE

Please select a subscription cycle:

CALENDAR YEAR 2021

CALENDAR YEAR 2020

FISCAL YEAR 2020

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.

ADDING SUBSCRIPTIONS

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	<input checked="" type="checkbox"/>	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

Download:	2021	0 <i>Current</i>
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).

Selections can be added in 2 ways:

SELECT LAST YEAR'S SUBSCRIPTIONS 

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 **REMOVE SELECTION**  under the pricing options.

\$10.00	
Site License <input type="radio"/>	\$50.00
1 Simultaneous Users <input type="radio"/>	\$5.00
2 Simultaneous Users <input checked="" type="radio"/>	\$10.00
3 Simultaneous Users <input type="radio"/>	\$15.00

MAKING SELECTIONS

Product	Selected Last Year	Vendor	CARLI Funded	Price
> CARLI Product 1	<input checked="" type="checkbox"/>	CARLI Test Vendor		\$10.00
> CARLI Product 2	<input type="checkbox"/>	CARLI Test Vendor		\$75.00
<i>All changes saved automatically</i>			TOTAL	\$85.00
<input type="button" value="EXPORT"/>			<input type="button" value="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**.

[SELECT](#)[REVIEW](#)[COMPLETE](#)

Please review your purchase. You have selected the following item(s):

Product ▲	Vendor ▼	SU	Cost ▼
CARLI Product 1	CARLI Test Vendor	2	\$10.00
CARLI Product 2	CARLI Test Vendor	Site License	\$75.00
<i>This is an estimate. Prices may have minor variations based on final vendor invoices.</i>			TOTAL
			\$85.00

[CHANGE SELECTIONS](#)[EXPORT](#)[COMPLETE](#)

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

SELECT

REVIEW

COMPLETE

Thank you! You have completed your subscriptions

You can continue to make changes until

Product ▲	Vendor ⇅	SU	Cost ⇅
CARLI Product 1	CARLI Test Vendor	2	\$10.00
CARLI Product 2	CARLI Test Vendor	Site License	\$75.00
<i>This is an estimate. Prices may have minor variations based on final vendor invoices.</i>			TOTAL \$85.00

CHANGE SELECTIONS
EXPORT
ASK CARLI ?

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.

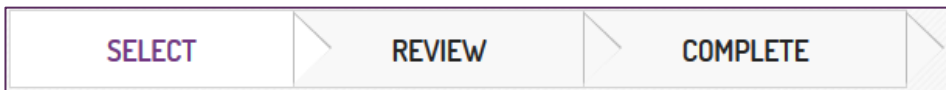
COMPLETING SELECTIONS

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
Available for Purchase Year-Round



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).

A rectangular button with a white background, a thin orange border, and a thin purple border. The text "IP ADDRESSES" is centered in orange, uppercase letters.

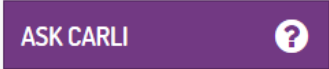
IP ADDRESSES

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)

A rectangular button with a white background, a thin orange border, and a thin purple border. The text "MANAGEMENT" is centered in orange, uppercase letters.

MANAGEMENT

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