Introducing our **Customer Analytics Platform (CAP)**

cap.ulibrary.app



ulibrary

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1.0

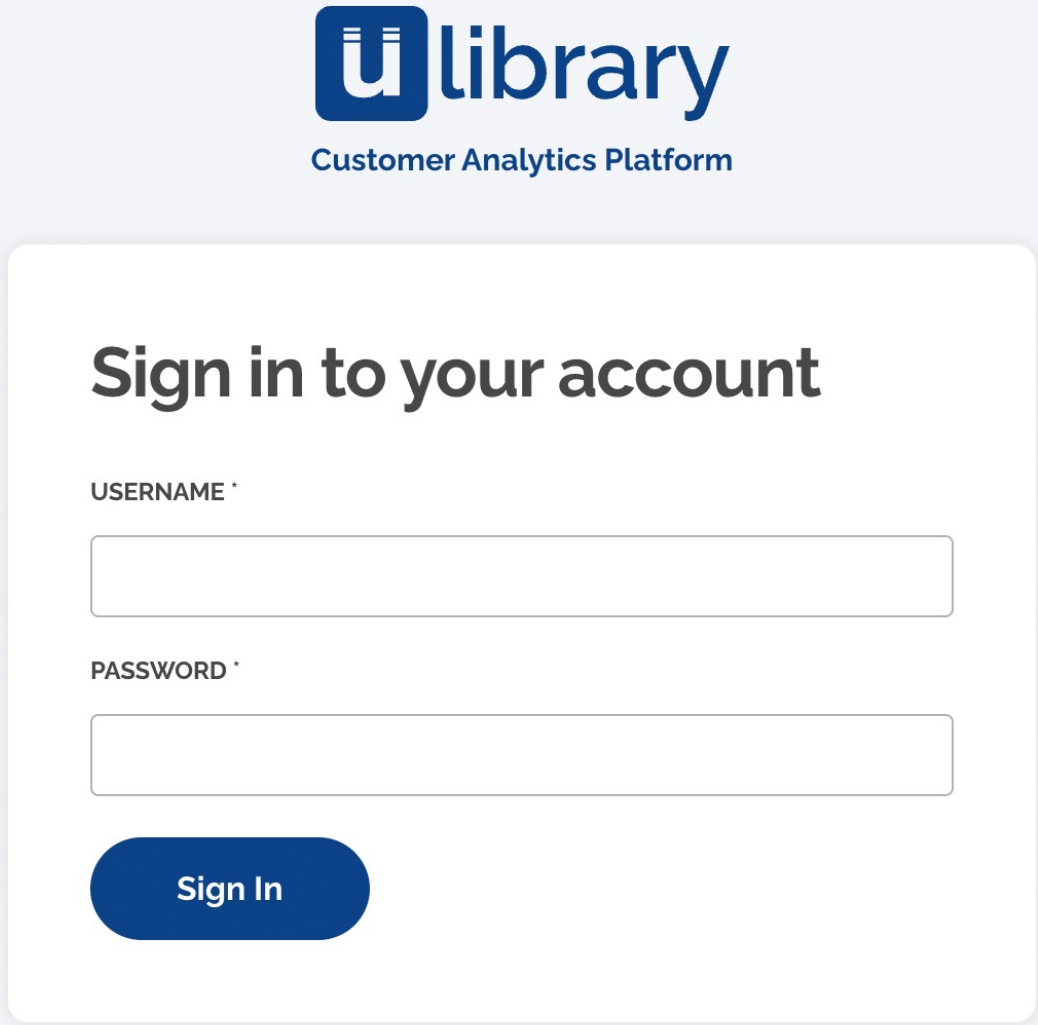
Getting Started

Logging in to the platform

Visit cap.ulibrary.app in a web browser in order to login.

Simply add your **Username** (which is your email address) and **Password** and click **Sign In**.

*Please note our **Technical Support** team will send your login credentials directly via email. If you have not received these or are having trouble logging in, please contact our **Technical Support** team via **digital@ulverscroft.co.uk**.*



1.2

Resetting your password

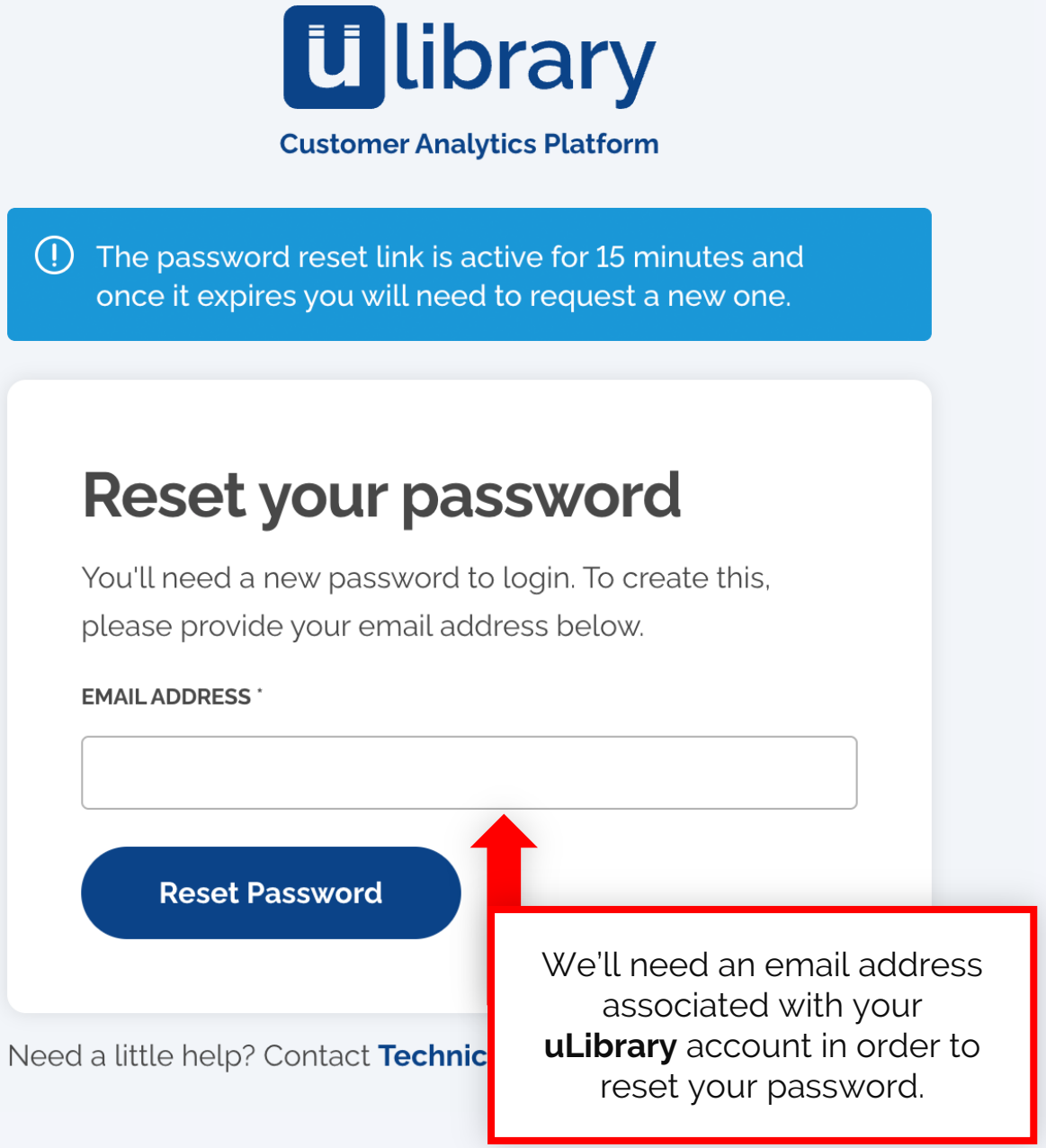
If you've forgotten your password, you can reset it by visiting cap.ulibrary.app/passwordresetrequest.

Here, simply enter an email address associated with your account and click the '**Reset Password**' button.

You should then receive an email with a link to a secure page which will allow you to **reset your password**.

Please note, it's possible this email may appear in your junk folder. Furthermore, the password reset link is active for 15 minutes and once it expires you will need to request a new one.

If you don't receive this email, please contact our **Technical Support** team via digital@ulverscroft.co.uk.



1.3

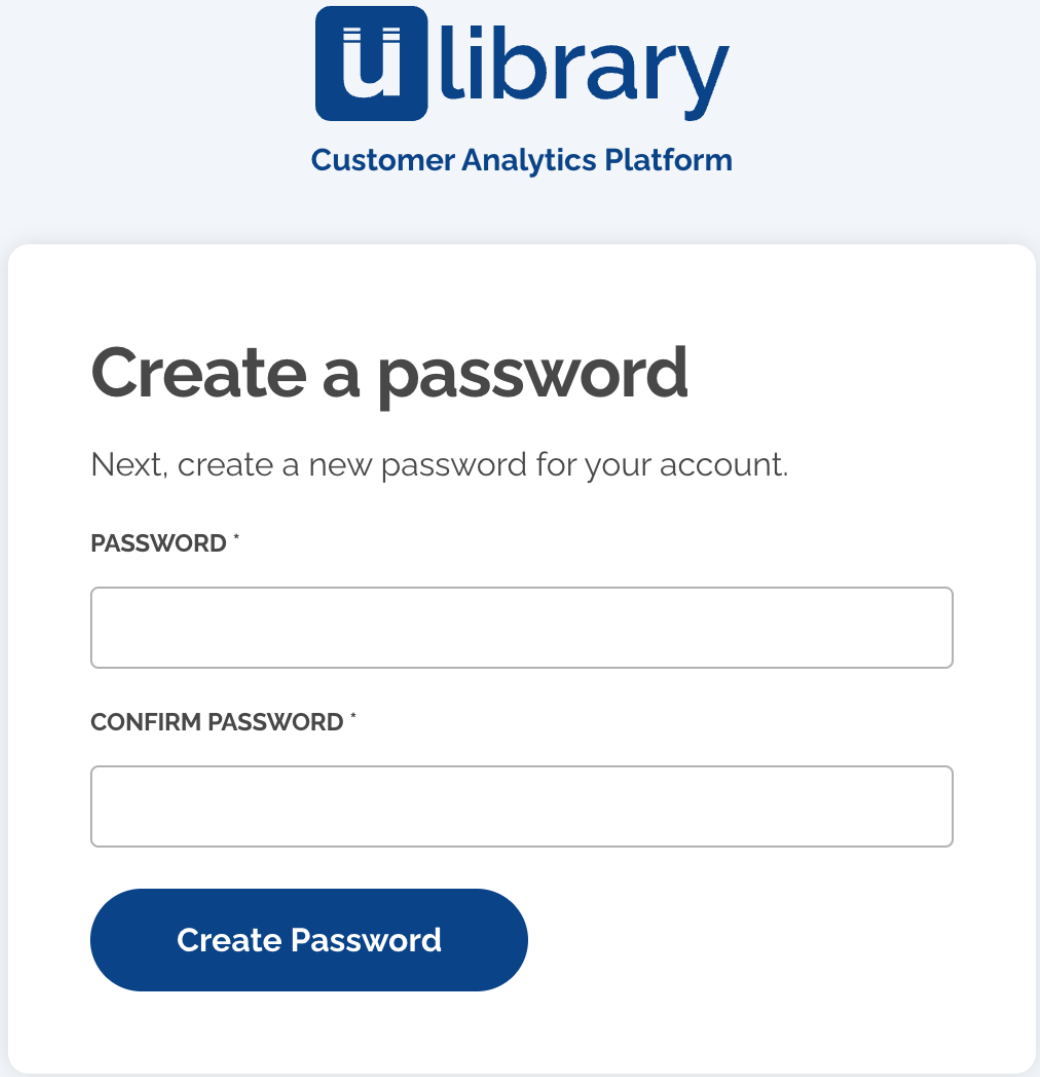
Create a password

Once you've clicked the link in the email, you'll be directed to a secure page where you can create a new password.

Here, add a **Password** of your choice and then confirm the password in the corresponding **Confirm Password** field.

Please note, in order to create a strong password, we would recommend your password is:

- At least 12 characters long but 14 or more is better.
- A combination of uppercase letters, lowercase letters, numbers, and symbols.
- Significantly different from any previous passwords.
- Easy for you to remember but difficult for others to guess.
- The UK's National Cyber Security Centre (NCSC) recommends that the best passwords are made up of three random words.



2.0

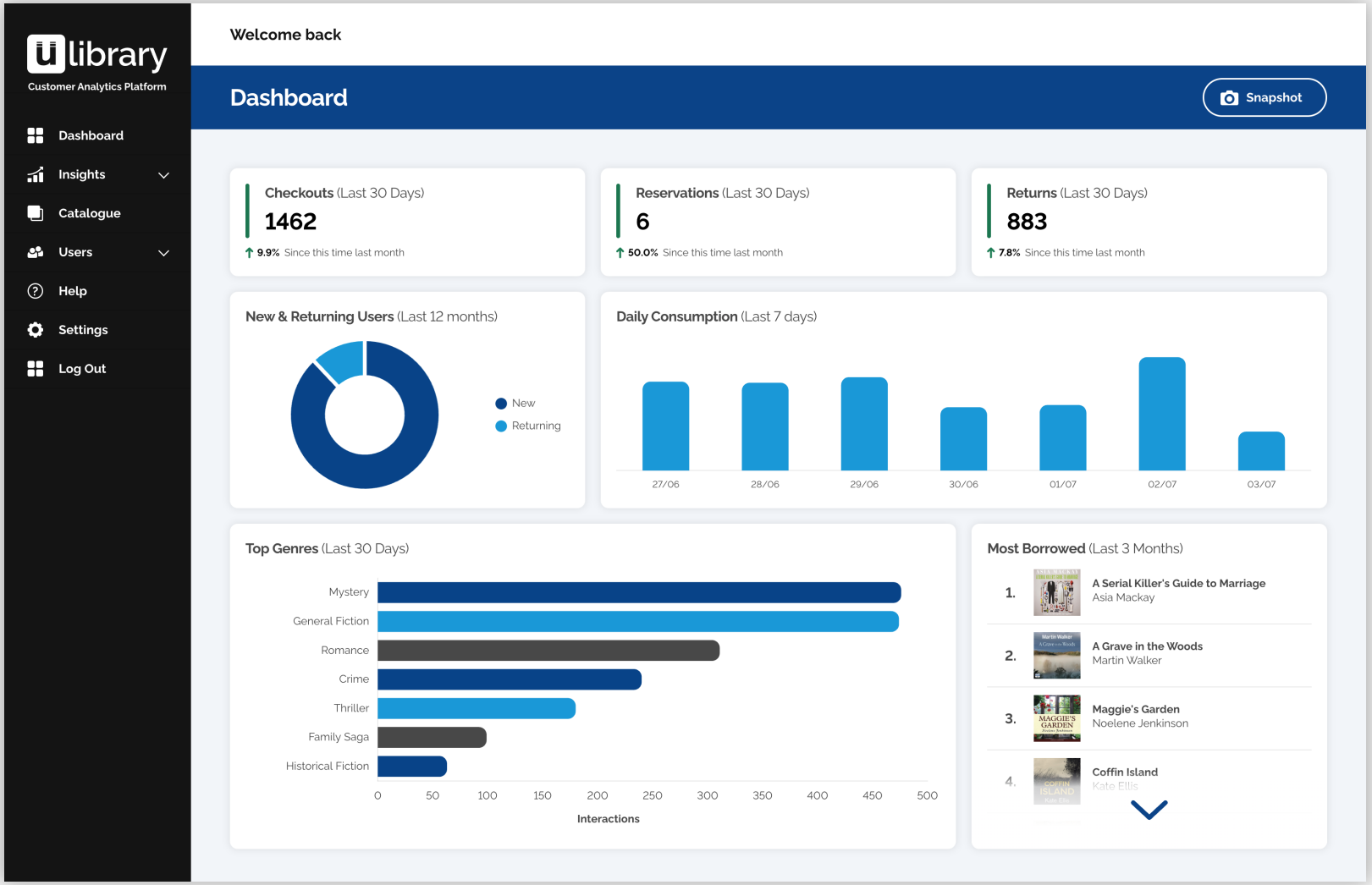
Dashboard Overview

Key metrics explained

Our new dashboard interface shows key metrics at a glance.

This includes **Checkouts**, **Reservations** and **Returns** (in the last 30 days) but you'll also notice there are new interactive charts showing **New & Returning Users** (in the last 12 months).

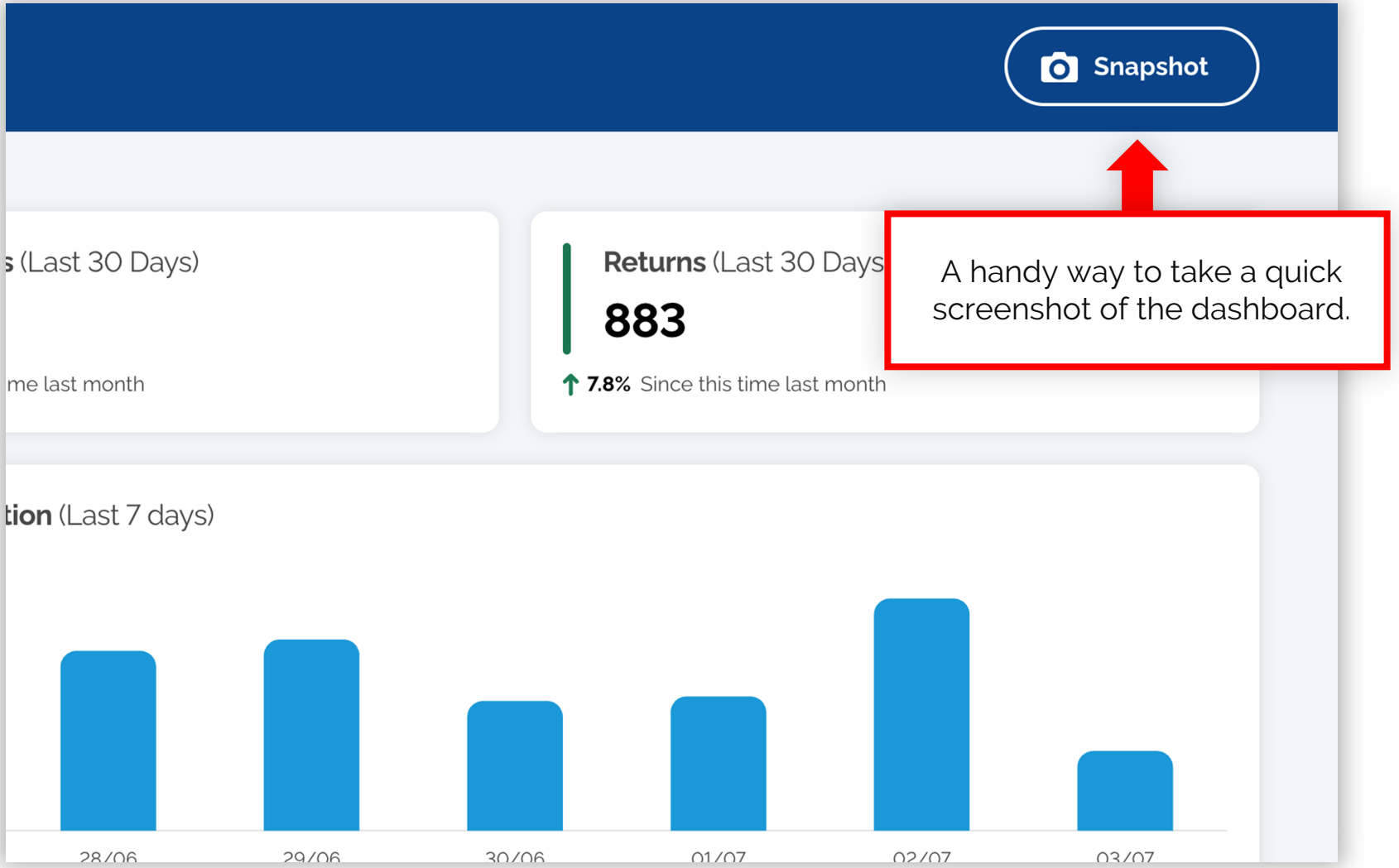
In a future development, we are looking at ways to toggle the Most Borrowed data so you can easily compare your own data with regional and global trends.



Taking a snapshot

You'll notice in the top right-hand corner of the new dashboard, there is a new **Snapshot** button.

This new feature allows you to quickly download a screenshot of the dashboard as a PNG image file.



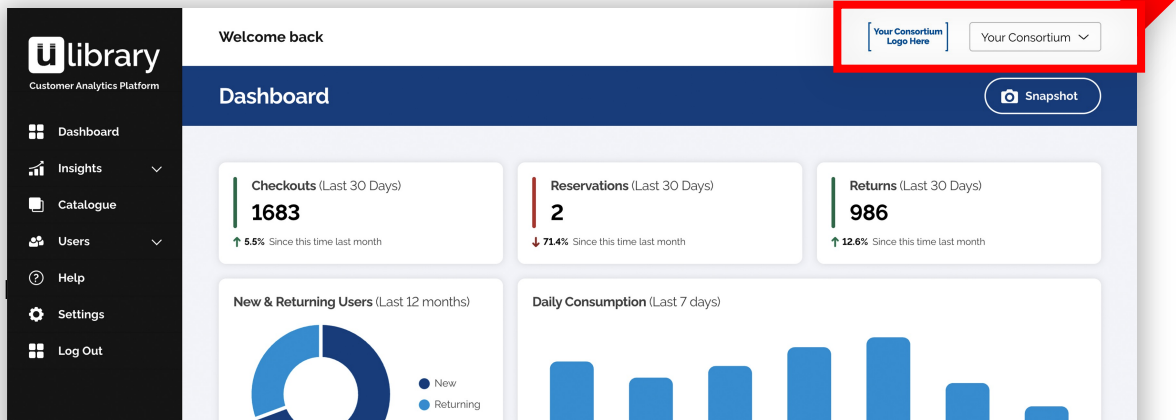
2.3

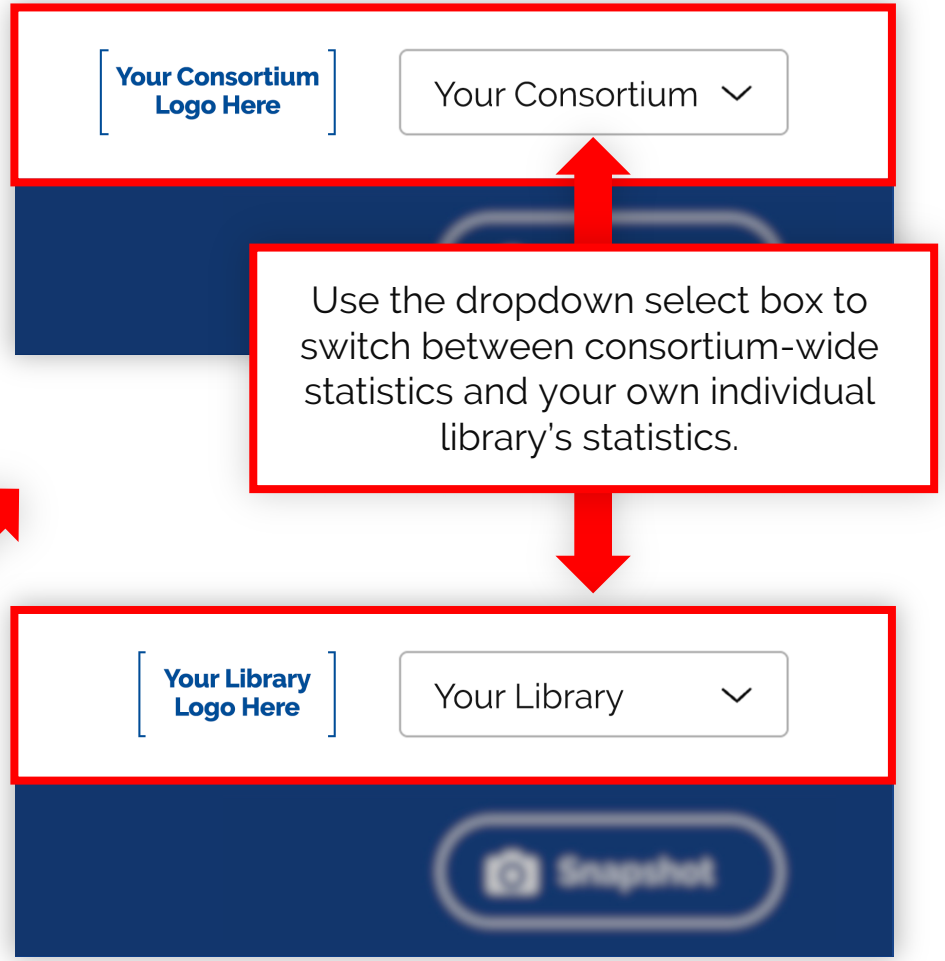
Viewing library stats vs. consortium-wide stats

If your library is part of a consortium, you will notice in the top right-hand corner of the website a dropdown select toggle is visible which allows you to switch between viewing consortium wide statistics vs. library level statistics.

This dropdown option allows you to choose which statistics are shown not only on the dashboard, but across all other pages of the platform too.

Please note, if you are not part of a consortium this toggle is not visible and you will simply see your library statistics by default. Also, this feature is currently desktop-only and will be added to mobile and tablet views in a future update.





3.0

Configuring Insights

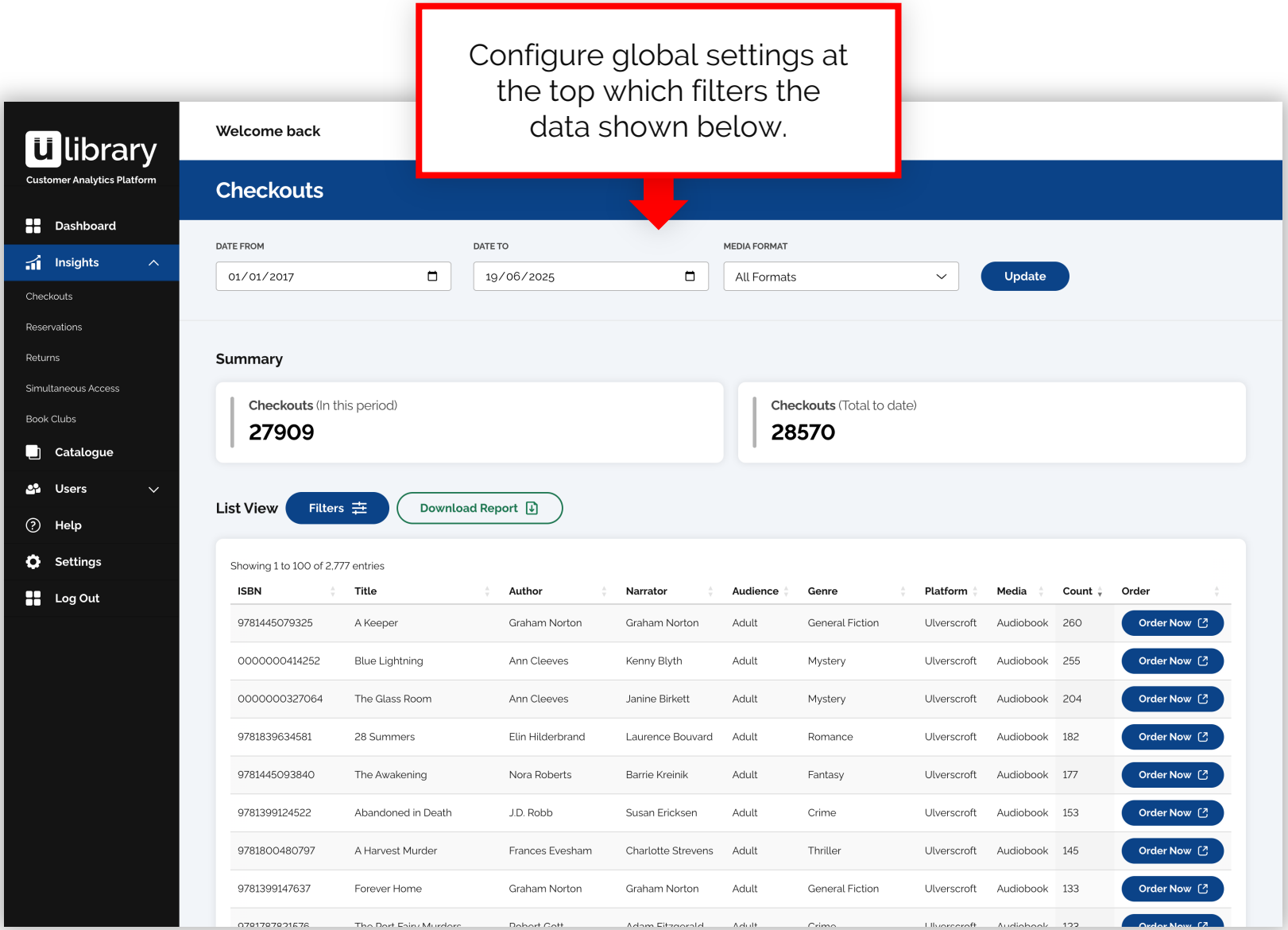
3.1

Using the global filters

In the main menu on the left-hand side, you'll notice key metrics live underneath a new top-level menu item labelled **Insights**.

Under **Insights** you'll find data relating to **Checkouts**, **Reservations**, **Returns**, **Simultaneous Access** and **Book Clubs**,

On each of these pages, you can **configure global filters** at the top of the page which allows you to view data in a **specified date range** as well as **data related to specific media formats**.



3.2

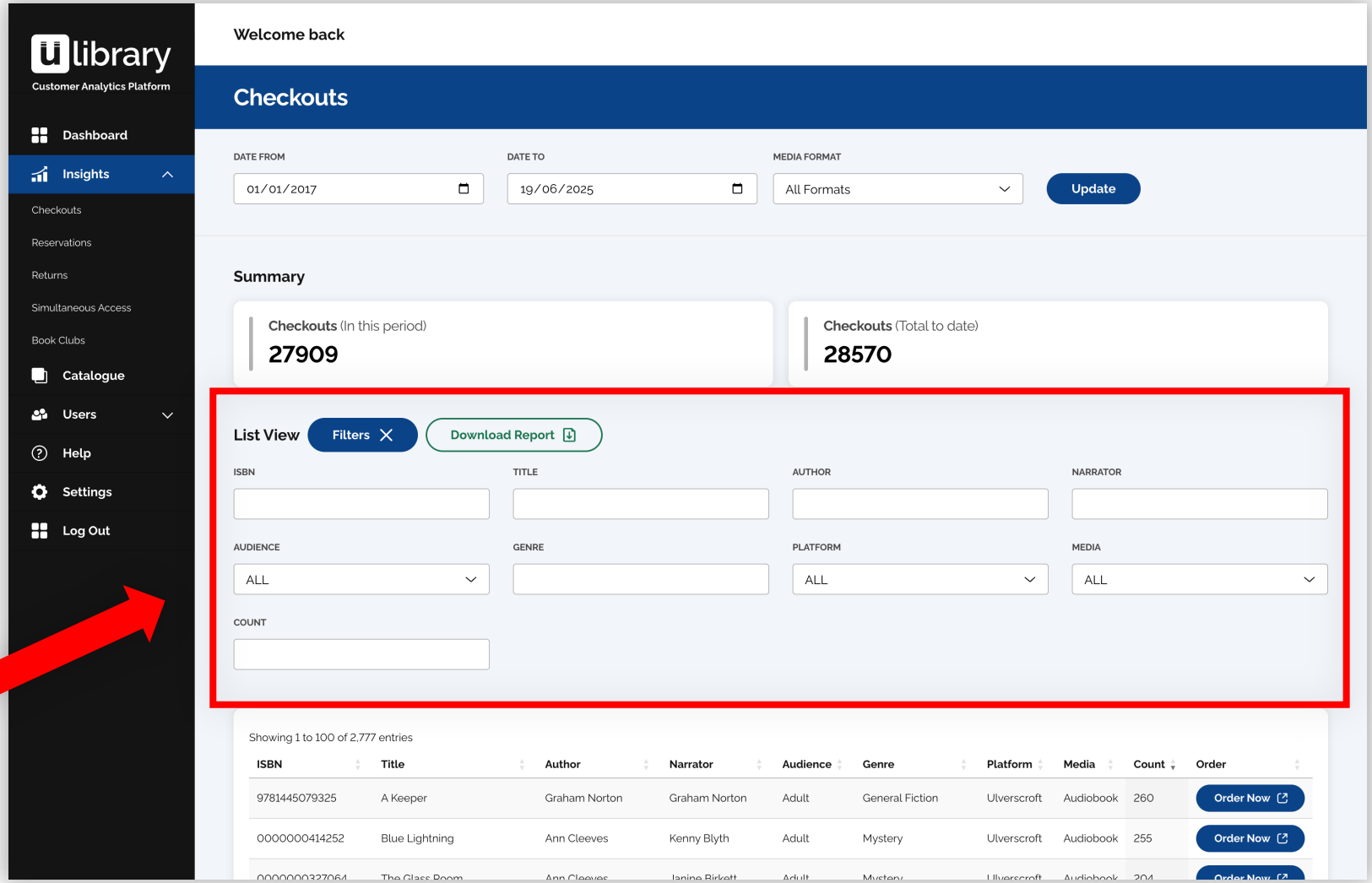
Filtering the list view

Further down these pages, you'll see a **List View** of the chosen data.

Here, you can click the **Filters** button which will open a dropdown containing a number of text field and select dropdown inputs, which correspond to the data shown in the listing.

In each of these inputs, you can enter specific terms (for example a specific ISBN or author name). The listing will update as you enter your search terms.

*Note: You can also **download a report** in CSV format.*



4.0

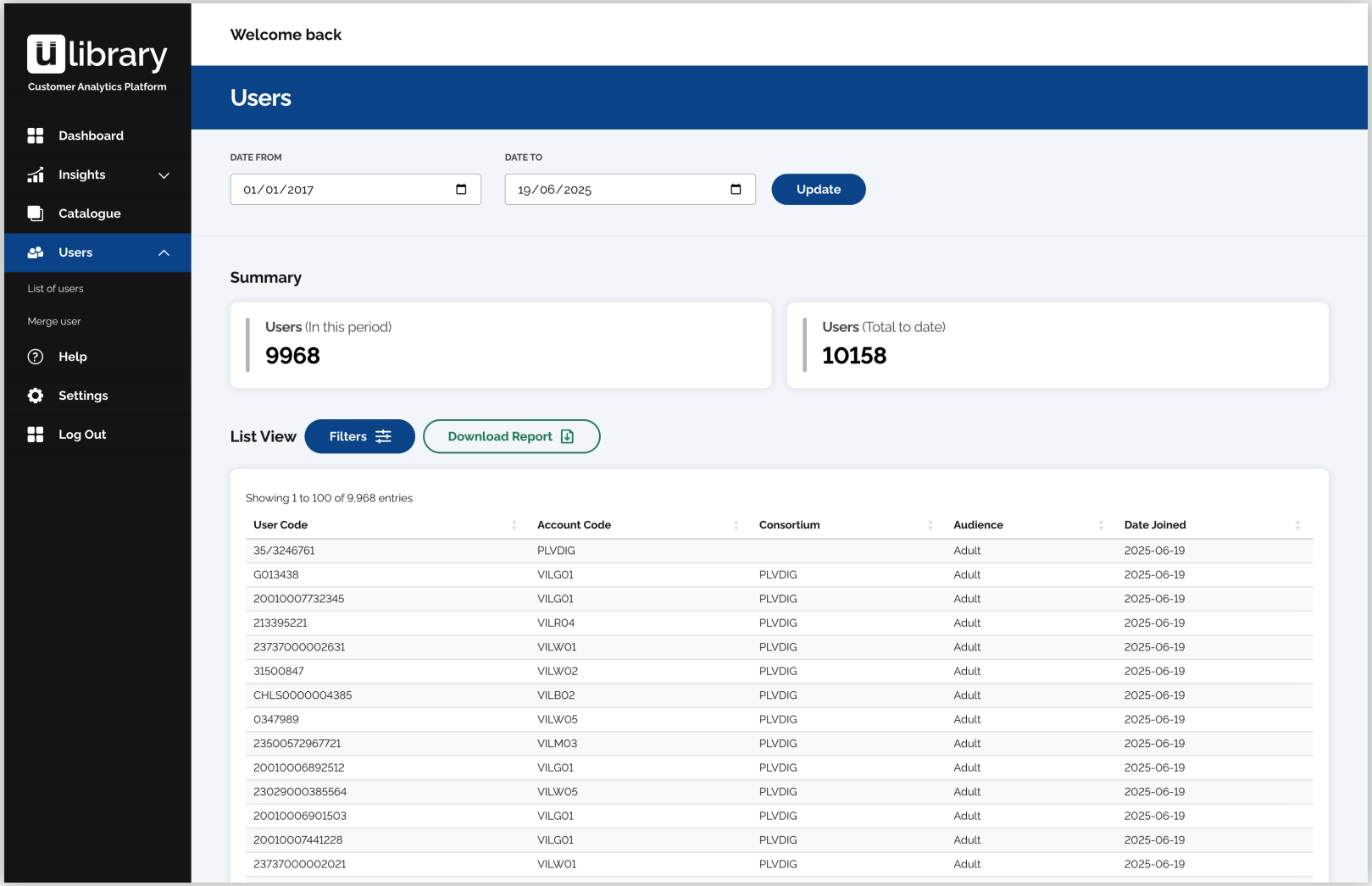
Managing Users

Users listing

Under the **Users** menu, you'll find pages for **List of users** and **Merge user**.

On the **List of users** page, you'll again be able to configure global date ranges to only view users registered in a specified date range.

In the **List View** table, the data may also be filtered by toggling the **Filters** button, while a report can be downloaded via the **Download Report** button.

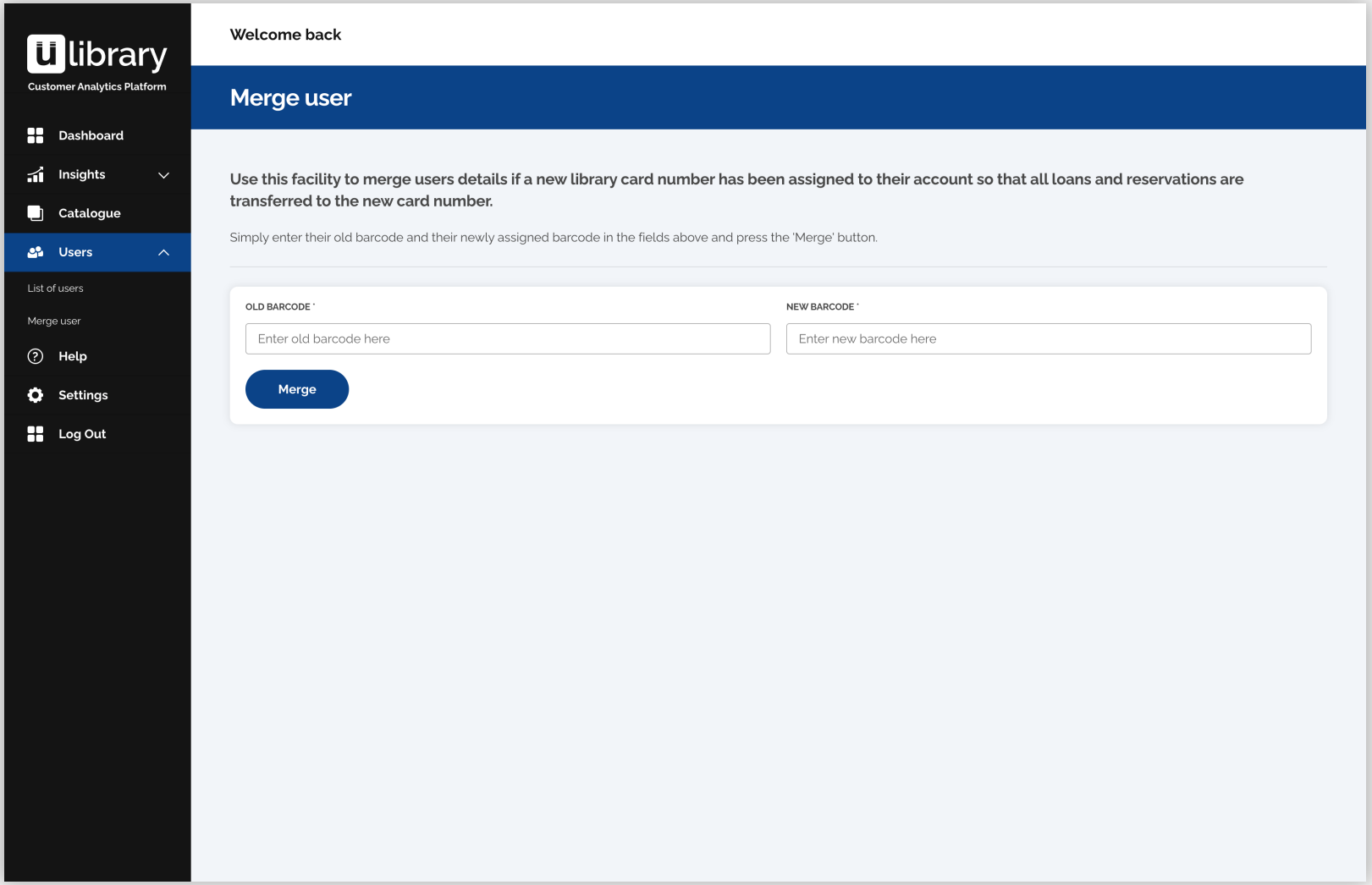


Merging users

On the **Merge user** page, you can combine an old barcode with a new one.

Where you might have a duplicate user, this can be very helpful to ensure their data is in one place.

Simply enter the **Old Barcode** and the **New Barcode** in the corresponding fields and click **Merge**.



5.0

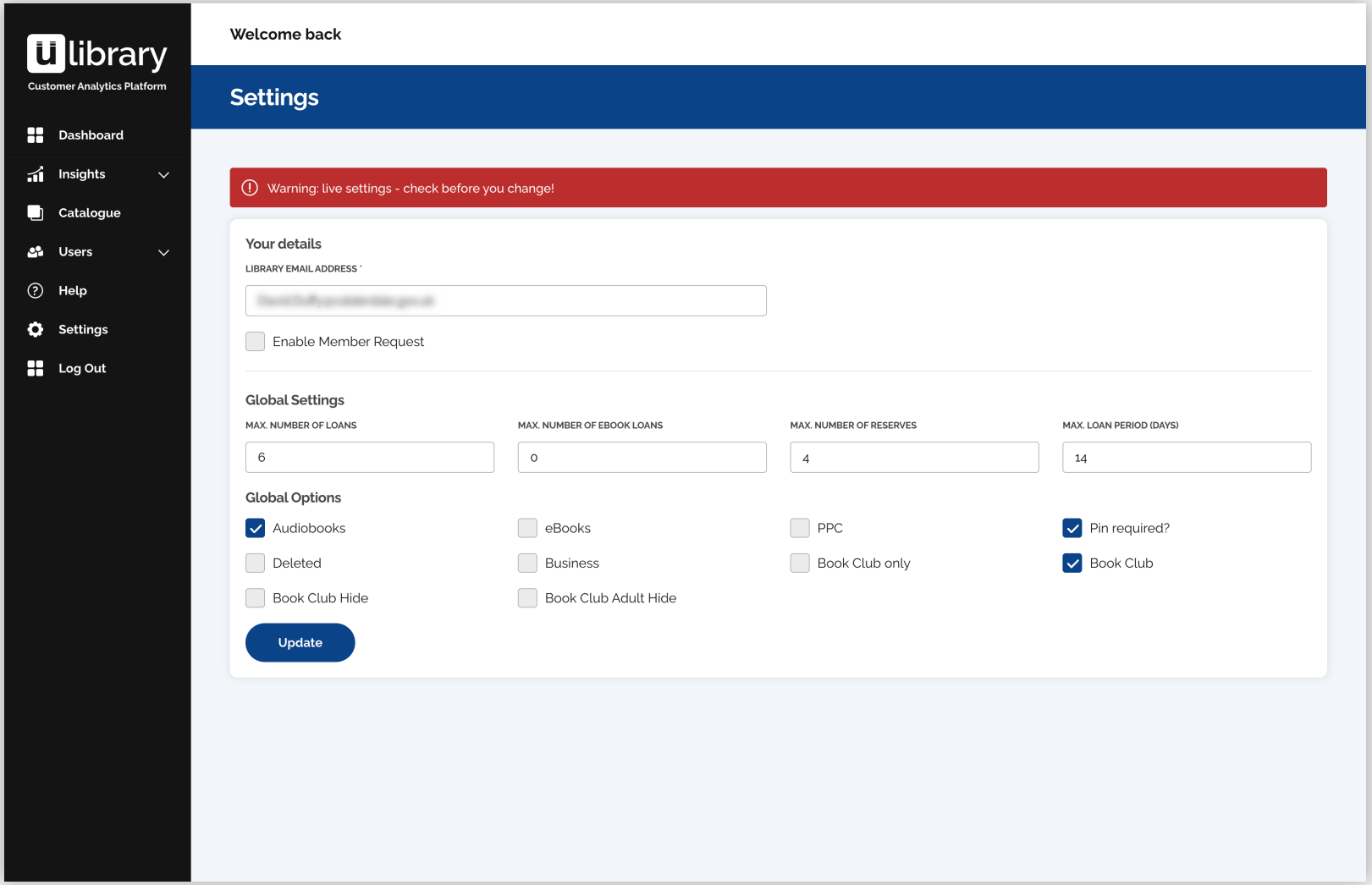
Settings

5.1

Changing settings

On the **Settings** page, you can amend a number of settings, depending on your user level.

This includes your **Library Email Address**, **Max. number of loans & reserves**, as well as the **maximum loan period.**



If you have any queries or feedback about the new platform, we'd love to hear from you! Please get in touch with your local uLibrary account manager.