

**Kortex** Est 2013

Librarian's guide

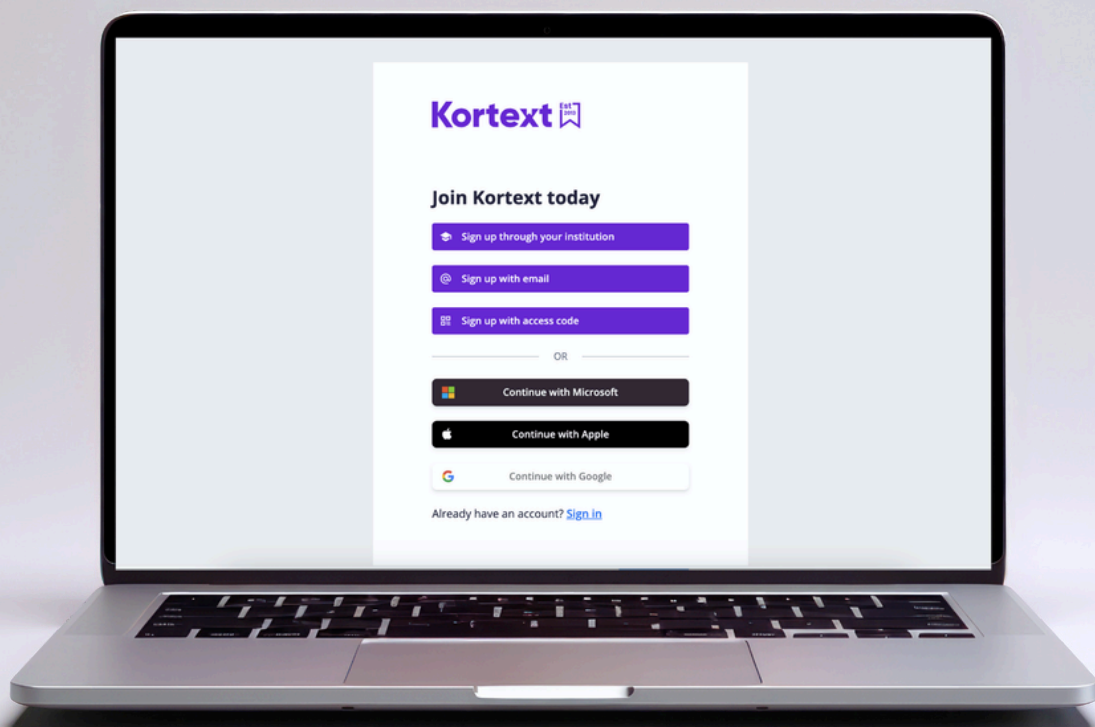
# Table of contents

How to sign in	3
<hr/>	
The bookshelf	4
<hr/>	
The eReader	5
<hr/>	
Analytics	6
<hr/>	
DDA Manager	9
<hr/>	
Reports	11
<hr/>	
Acquisitions	12
<hr/>	

## How to sign in to Kortext

Before you can use the Kortext **study** platform, you'll need to log in via one of the following methods:

- Web
- OpenAthens
- Shibboleth



You should have received your login details from Kortext during onboarding. If you have not received them, please contact your Account Manager and they will be happy to help you.

## The bookshelf

Easy to navigate and fully searchable for seamless content discovery, the bookshelf is what your students will see when they log in.

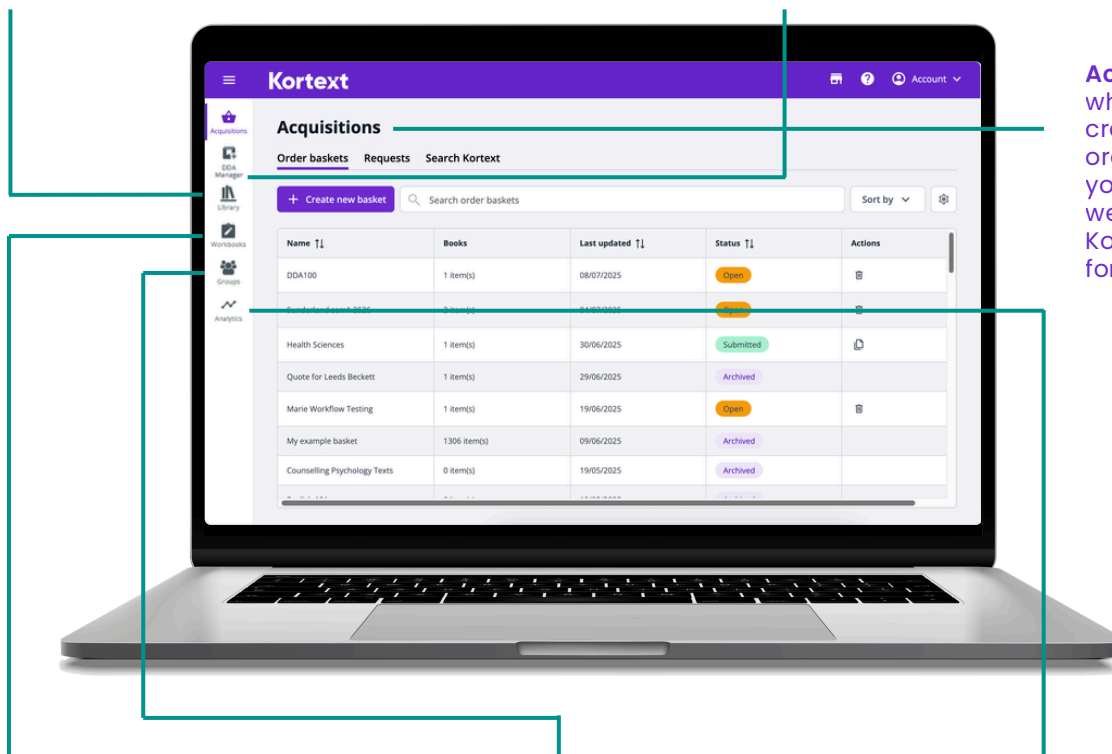
As a librarian, it's likely that you will receive queries from users. This guide to the bookshelf will provide you with all the information you need.

We help our partner institutions take teaching and learning to the next level through Kortext's personalised digital bookshelf.

**Library** shows users the books that have been provisioned to them. This is also where you can access institutionally provided content in the **Kortext Library** and **Collections**.

You can also access **My files** from the Library tab, where you can upload your own documents to Kortext to use our smart study features in your own files.

**Demand-Driven Acquisition (DDA) Manager** allows you to track in-demand titles while making content available to students without requiring an upfront purchase. Instead of buying in advance, items are only acquired when there is real usage or when predefined approval criteria are met, ensuring that investment aligns with actual student need.



**Acquisitions** is where you can create and submit order baskets for your students, as well as search the Kortext inventory for title availability.

**Workbooks** allows you to collate your notes and highlights into convenient personalised areas, making your learning more organised and efficient.

**Groups** enables students and staff to create study groups for easy collaboration and note sharing.

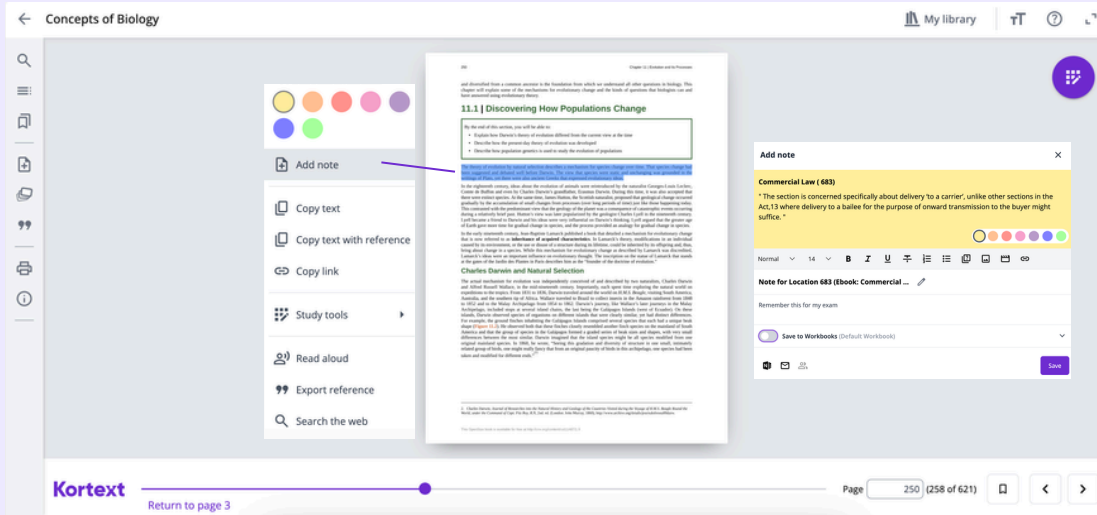
**Analytics** is where you get access to detailed data and reports about platform usage by your cohort.

Our intelligent search engine within the **Library** makes it even easier to find relevant content from provisioned books. This functionality includes:

- **Predictive search** – when a user begins to type, the search will predict the word(s).
- **Predictive results** – a list of recommended results appears under the search results which can be filtered alphabetically, by publication year and by publisher.

## The eReader

With the Kortext eReader, students can study in a way that suits them, utilising smart study tools and accessibility features that remove barriers to learning.



Students can use our **Create note** feature to format their notes in a more visual way and link to web pages, images and videos – all using our rich-text editor.

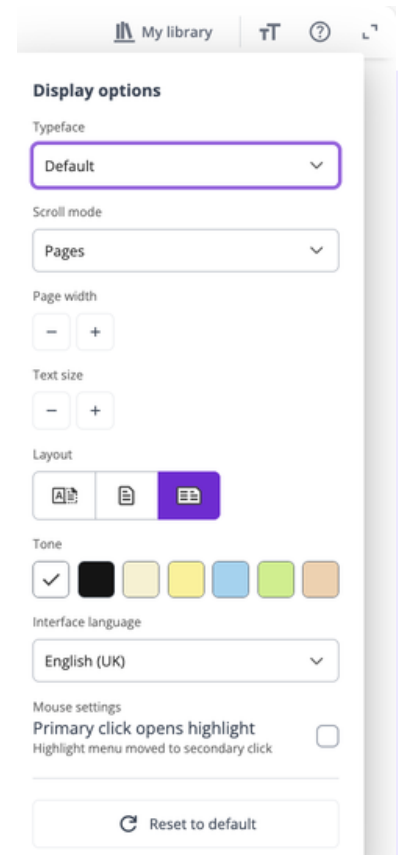
## Accessibility

We're committed to providing the best experience for everyone, regardless of disability or impairment, to meet the needs of all users and challenge barriers to learning.

Our features include:

- Convert text to speech with our **read aloud** tool
- Select your preferred **background** colour
- Change **font** style (including OpenDyslexic) and size
- Adjust **line spacing, margins** and **justification**
- **Enlarge** text using magnification tools or reflow
- Read **offline** for more inclusive learning
- Skip the mouse and trackpad using **keyboard-only navigation**.

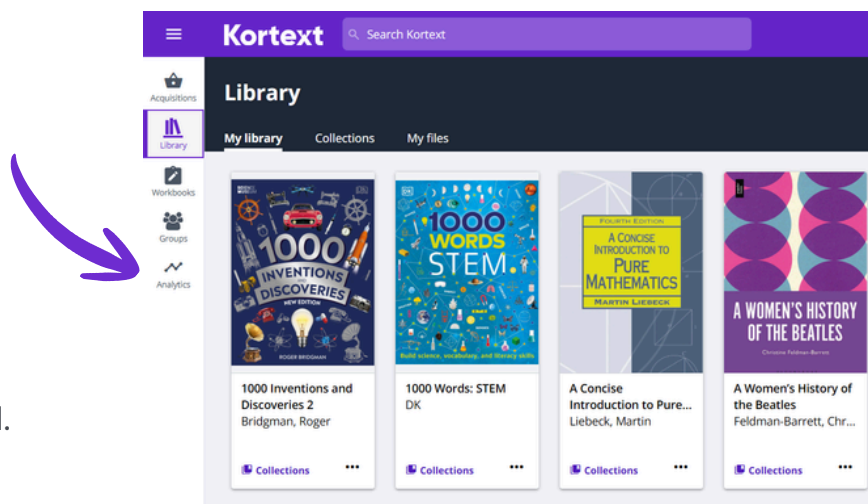
We're fully compliant with the [European Accessibility Act](#), meeting Level AA of the [Web Content Accessibility Guidelines \(WCAG\) 2.2](#).



## Analytics dashboard

log in to your account at <https://app.kortext.com/login> and select Analytics from the vertical navigation bar.

This will take you to your institution's analytics dashboard.



## Dashboard elements

There are four main elements to the Analytics Dashboard. The first section provides links to the different analytics areas.

1

### Analytics

Summary User Access List Counter ▾

2

Provisioning period ⓘ 01/08/2025 - 31/07/2026 🗑️ < PREV NEXT >

3

🔖 Bookmark ▾

The second and third sections display the period of time being analysed and the Bookmarks panel.

## Provisioning period

The Provisioning period is flexible and can be adjusted to any date from the present to the past.

Prev and Next buttons will change the Provisioning Period to the immediate past or future date period that is of the same length as the current Provisioning Period set by the user.



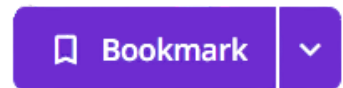
## Student activity period

This filter shows you the period when students actively accessed or used their books. Select a start and end date to narrow the data to the student usage window you want to analyse.



## Bookmarks

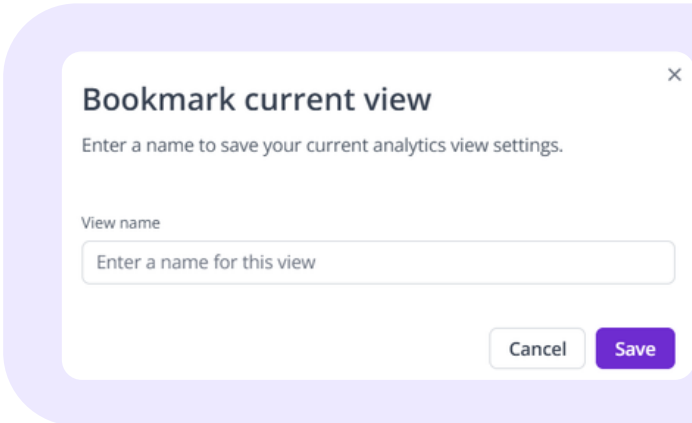
Bookmarks allow the user to capture the current configured view of an Analytics Reports, including filtering and the state of the visuals, for future reference and collaborative sharing.



Bookmarks are stored in the Bookmarks section on the right side of a report, which can be expanded and collapsed by clicking on the arrow.

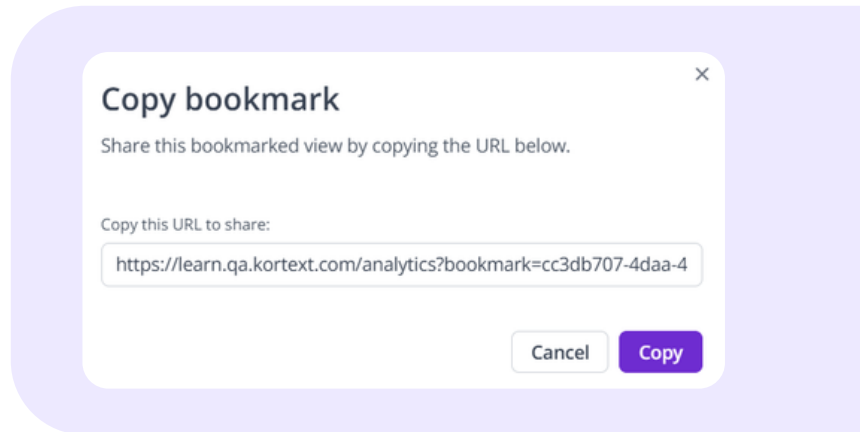
## Creating a bookmark

Create a bookmark using the Create Bookmark button, bookmarks are stored in the Bookmarks section on the right side of a report, which can be expanded and collapsed by clicking on the arrow.



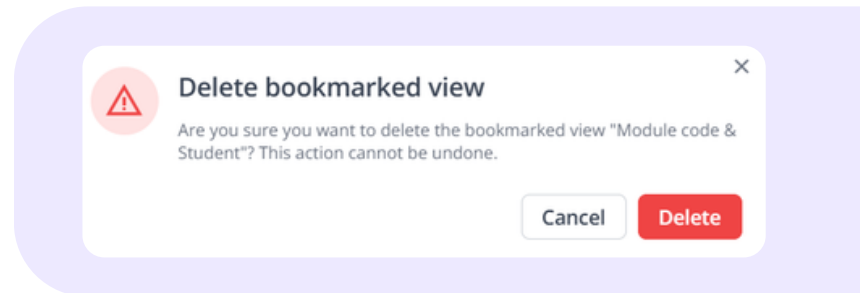
## Sharing a bookmark

Existing bookmarks can be shared by clicking the URL icon next to a bookmark. This opens the copy-bookmark modal, where you can copy the URL by selecting the Copy button. The copied link can then be shared with any user who has access to the Admin Analytics dashboards.



## Deleting a bookmark

To delete an existing bookmark, simply click on the Wastebasket icon next to an existing bookmark, and select delete to confirm.



## Filters

The **Filters** panel on the right of the page contains and manages filters for the user to segment their analytics.

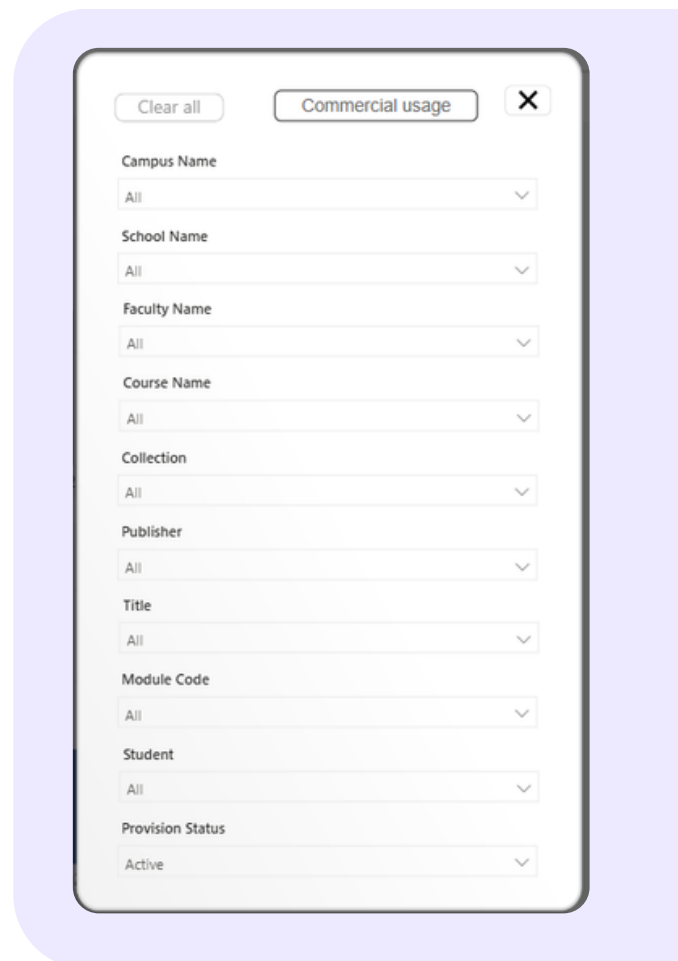
There are 10 separate filters contained in a collapsible panel which can be applied to all pages in a report.

Options dynamically adjust based on your selections, showing only relevant and available data.

Select one or any number of filters to segment a report. These can be individually, expanded and collapsed.

A single selection can be made per filter section. The Filters icon shows the number of active filters.

Clear a selection within a section by clicking Clear selections, and clicking Clear all will remove all filters and reset the Analytics view.



## Demand Driven Acquisition (DDA) Manager

Demand Driven Acquisition (DDA) Manager allows you to create curated lists of titles that form DDA Collections. These collections are discoverable by students, and titles are only purchased when predefined usage criteria are met

### Overview

DDA Manager has two main areas:

- > **Collection builder:** DDA Manager has two main areas.
- > **Collections:** Manage and review your saved collections

### Collection builder

The collection builder helps you find and curate titles for your DDA collections using a range of filters.

### Search and filter

You can refine your search using the following filters:

#### General filters

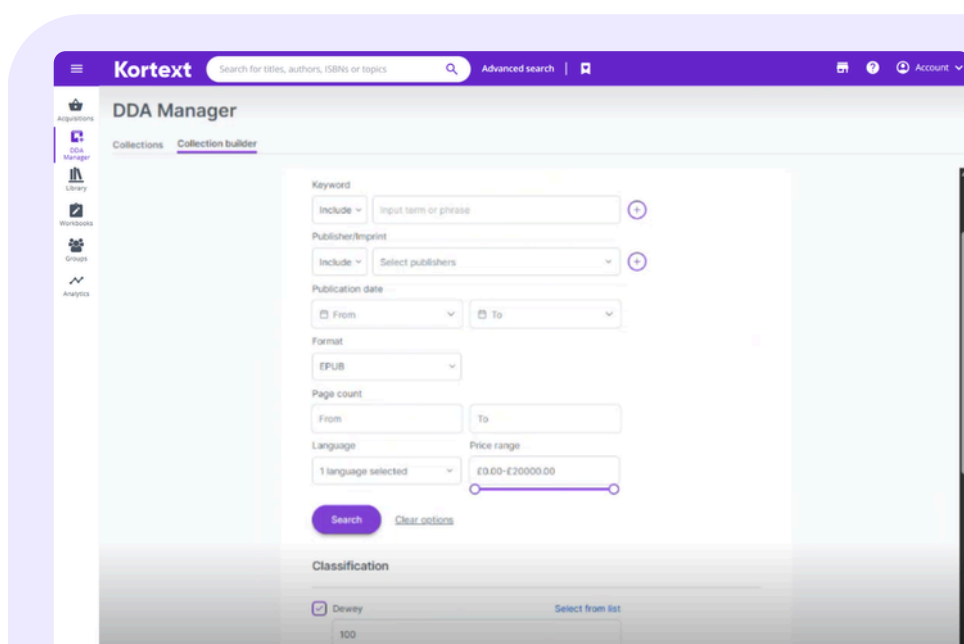
- > **Keyword** – Search for terms or phrases. You can add multiple keywords and choose to include or exclude them.
- > **Publisher / Imprint** – Select one or more publishers or imprints to include or exclude.
- > **Publication date** – Filter by a date range.
- > **Format** – Choose formats such as PDF or EPUB.
- > **Page count** – Set a minimum and/or maximum page range.
- > **Language** – Filter by the language of the title.
- > **Price range** – Define a minimum and/or maximum price.

#### Classification

- > **Dewey** – Filter by Dewey classification.
- > **Library of Congress (LC)** – Filter by LC classification.

#### Subject headings

- > **Library of Congress Subject Headings (LCSH):** Search by subject headings.
- > **Thema:** Filter using Thema classifications.
- > **BISAC:** Filter using BISAC categories.



## Upload titles

Upload a pre-selected list of titles using an Excel or CSV file.

## Working with results

After running your search, you will see a list of matching titles.

- Not all titles are eligible for DDA.
- Currently, only Library 1U Perpetual licence titles can be included.
- Eligible titles become visible once added to a collection.
- Additional licence types will be supported in future updates.

## Creating and updating collections

You can:

- Add titles to an existing collection
- Create a new collection using Create new DDA search collection

## Batch actions

- Select and add multiple titles at once
- Current limit: up to 49 titles per batch (this will increase in future releases)

When your collection is ready, click Submit collection.

## Availability

DDA Manager currently displays prices in GBP (£) only. Additional currencies will be supported soon.

## Collections

The collections tab is your central workspace for managing DDA collections. Here you can:

- Review collections
- Prepare collections for ordering
- Track collection status

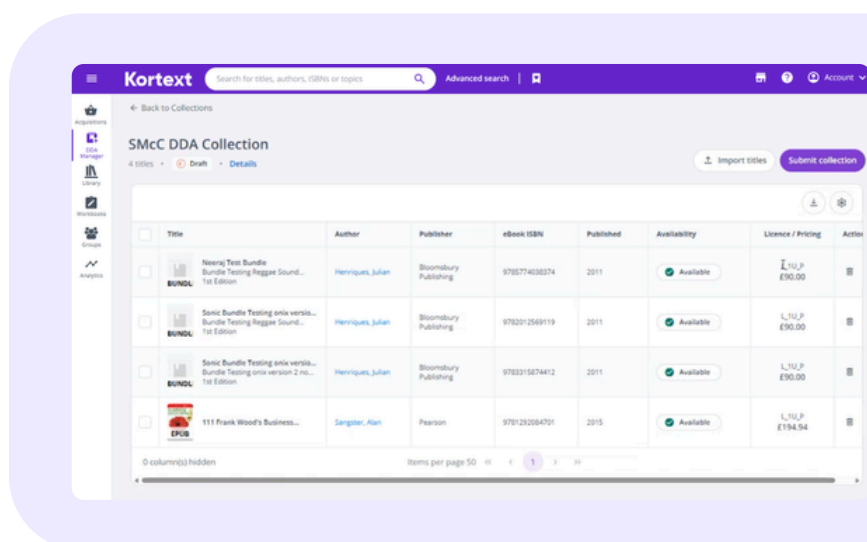
## Managing collections

You can delete a collection using the bin icon on the right-hand side. Only Draft collections can be deleted.

## Collection statuses

Each collection has one of the following statuses:

- **Draft:** The collection is editable and has not been submitted.
- **Processing:** The collection has been submitted to Kortext. No further changes can be made.
- **Active:** Processing is complete. Titles are now available in your institution's library.
- **Inactive:** An error occurred. Titles have not been provisioned.



## Analytics reports

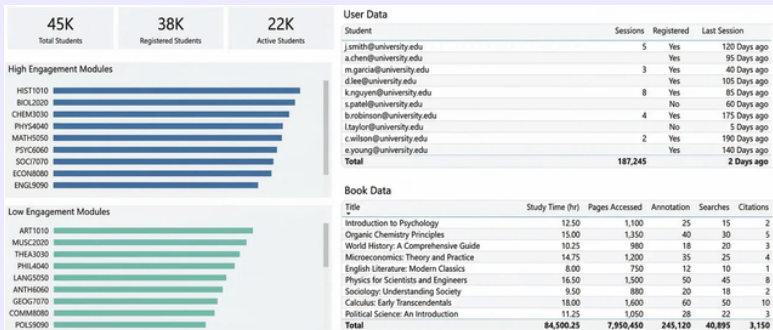
Access a variety of reports based on your needs, using the capabilities of our analytics software. Find our preconfigured reports outlined below.

### Summary report

The **summary report** is a high-level overview of student engagement on the platform. The report contains a summary of student enrolment and how students have engaged with their books via Kortext.



### User report

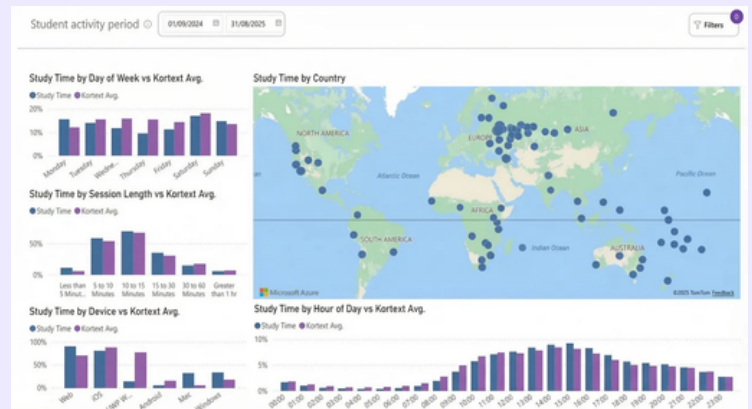


The **user report** has a detailed breakdown of the user summary. Included in the report are lists that highlight both low and high engagement modules.

### Access report

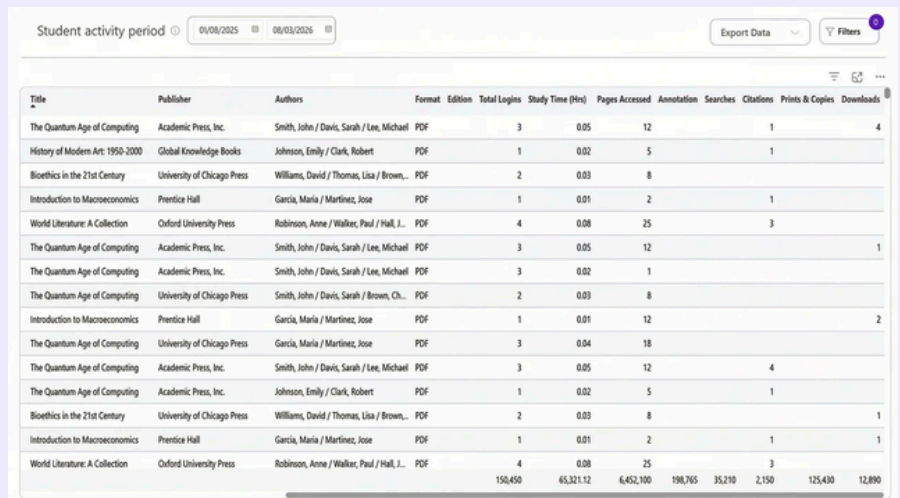
The access report provides detailed insight into how, where and when users are accessing their content.

Explore what devices are being used and how much time students are spending in their average study sessions using a range of filters to refine your results.



## List report

The list report allows admin users to easily filter dashboard data. Alongside standard filtering options, it includes a ranking feature that highlights the highest- and lowest-performing items at a glance, supporting faster insight generation, clearer comparisons, and more confident decision-making.



The screenshot shows a 'Student activity period' filter set to 01/01/2025 to 08/31/2025. Below the filter is a table with columns: Title, Publisher, Authors, Format, Edition, Total Logins, Study Time (Hrs), Pages Accessed, Annotation, Searches, Citations, Prints & Copies, and Downloads. The table lists various titles such as 'The Quantum Age of Computing', 'History of Modern Art: 1950-2000', and 'Bioethics in the 21st Century' with their respective usage statistics.

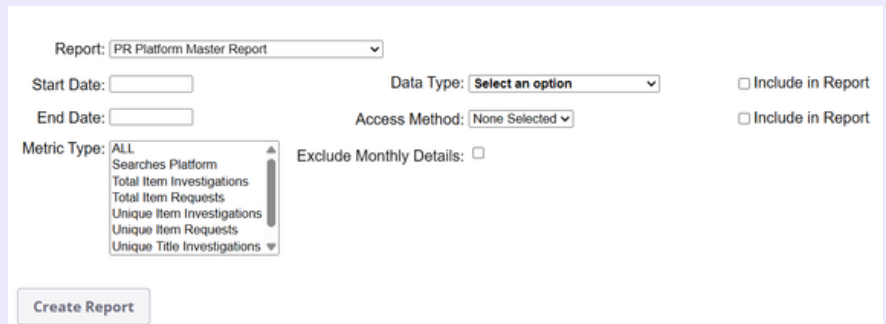
Title	Publisher	Authors	Format	Edition	Total Logins	Study Time (Hrs)	Pages Accessed	Annotation	Searches	Citations	Prints & Copies	Downloads
The Quantum Age of Computing	Academic Press, Inc.	Smith, John / Davis, Sarah / Lee, Michael	PDF		3	0.05	12			1		4
History of Modern Art: 1950-2000	Global Knowledge Books	Johnson, Emily / Clark, Robert	PDF		1	0.02	5			1		
Bioethics in the 21st Century	University of Chicago Press	Williams, David / Thomas, Lisa / Brown...	PDF		2	0.03	8					
Introduction to Macroeconomics	Prentice Hall	Garcia, Maria / Martinez, Jose	PDF		1	0.01	2			1		
World Literature A Collection	Oxford University Press	Robinson, Anne / Walker, Paul / Hall, J.	PDF		4	0.08	25			3		
The Quantum Age of Computing	Academic Press, Inc.	Smith, John / Davis, Sarah / Lee, Michael	PDF		3	0.05	12					1
The Quantum Age of Computing	Academic Press, Inc.	Smith, John / Davis, Sarah / Lee, Michael	PDF		3	0.02	1					
The Quantum Age of Computing	University of Chicago Press	Smith, John / Davis, Sarah / Brown, Ch.	PDF		2	0.03	8					
Introduction to Macroeconomics	Prentice Hall	Garcia, Maria / Martinez, Jose	PDF		1	0.01	12					2
The Quantum Age of Computing	University of Chicago Press	Garcia, Maria / Martinez, Jose	PDF		3	0.04	18					
The Quantum Age of Computing	Academic Press, Inc.	Smith, John / Davis, Sarah / Lee, Michael	PDF		3	0.05	12			4		
The Quantum Age of Computing	Academic Press, Inc.	Johnson, Emily / Clark, Robert	PDF		1	0.02	5			1		
Bioethics in the 21st Century	University of Chicago Press	Williams, David / Thomas, Lisa / Brown...	PDF		2	0.03	8					1
Introduction to Macroeconomics	Prentice Hall	Garcia, Maria / Martinez, Jose	PDF		1	0.01	2			1		1
World Literature A Collection	Oxford University Press	Robinson, Anne / Walker, Paul / Hall, J.	PDF		4	0.08	25			3		
					150,450	45,321.12	6,452,100	198,765	35,210	2,150	125,430	12,890

For example, analytics can be listed and ranked by publisher, module, usage level, or any other available criteria, with the ability to extract this data for use in other systems.

## Counter reports

The Counter section relates to the platform's reporting capabilities. Two types of Counter reports are available: Counter 5 and Counter 5.1, with 5.1 aligned to the latest reporting standards.

To open a report, click Counter and select either Counter 5 or Counter 5.1.



The screenshot shows a report generation interface. It includes a 'Report:' dropdown menu set to 'PR Platform Master Report'. There are input fields for 'Start Date:' and 'End Date:'. A 'Data Type:' dropdown is set to 'Select an option'. There are checkboxes for 'Include in Report' and 'Exclude Monthly Details:'. A 'Metric Type:' dropdown is open, showing options like 'ALL', 'Searches Platform', 'Total Item Investigations', 'Total Item Requests', 'Unique Item Investigations', 'Unique Item Requests', and 'Unique Title Investigations'. A 'Create Report' button is at the bottom.

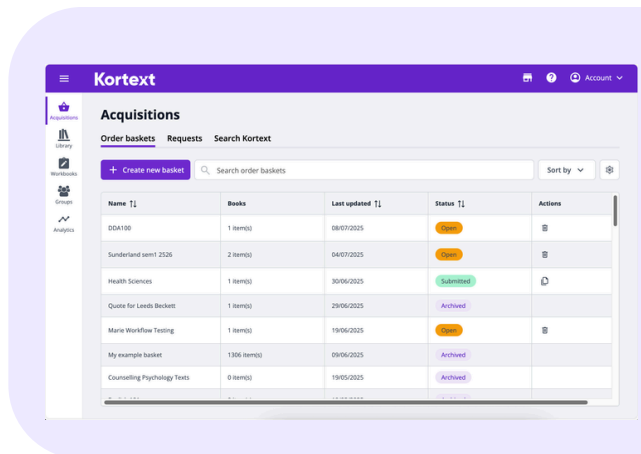
## Acquisitions portal

If the **acquisitions portal** is enabled at your institution, you will see the **Acquisitions** icon in the left-hand panel when you log in. This will take you to the portal.

The portal offers a quick and easy purchase order system. Our acquisitions engine makes searching, selecting and comparing material easy, and you can order content from 9,000 publishers worldwide.

Features of our **acquisitions portal** include:

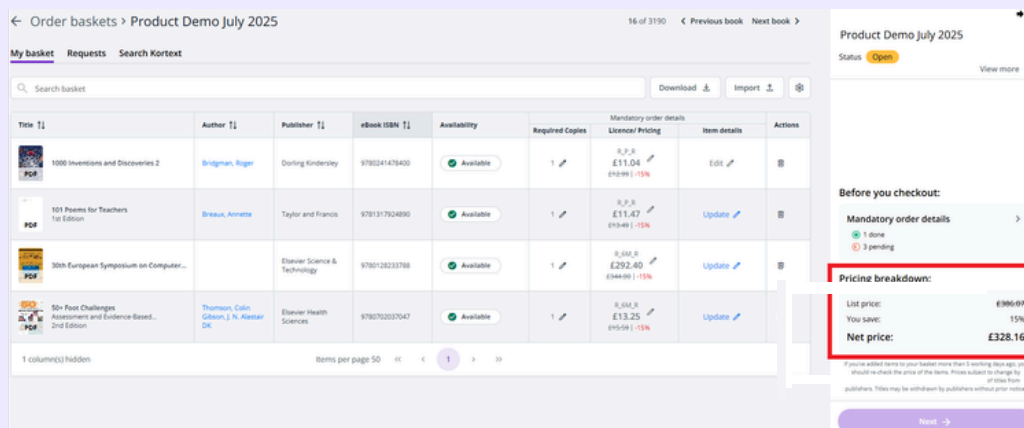
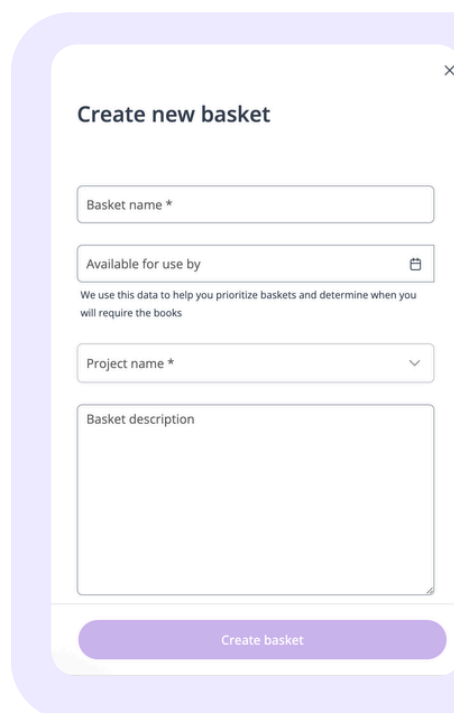
- **Order baskets** – easily review, manage and order books.
- **Upfront pricing** – see pricing, discounts, and licence types as you browse.
- **Manual searching** – search books by ISBN, book title or author.
- **Import reading lists** – save time by uploading your reading lists into your order basket.
- **Availability** – see instantly if a book is available.
- **Basket rollover and export** – duplicate baskets and export a list of titles to share with others.



## Order baskets

On the **order baskets** page, you can either select one of your open order baskets or you can create a new one as follows:

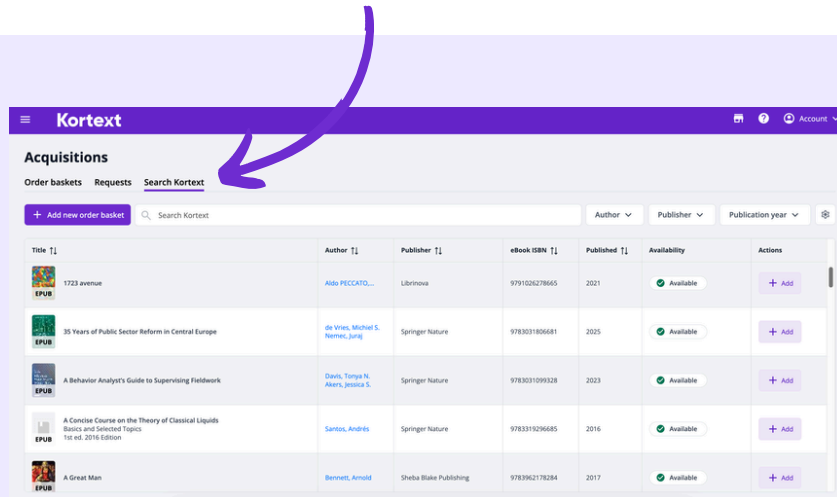
1. Click on the **Add new order basket** button on the left-hand side of the main screen.
2. Name your order basket and select your project name from the drop-down list.
3. Click the **Create basket** button to finish the process. Once you have done this, you'll be taken straight into the basket.



4. Simply click **Add titles** to begin searching for books. You can also use the **Import** button to add a list of titles you have already prepared.

## Manual searching

In your open basket, select **Search Kortext** from the toolbar which will enable you to conduct a manual search of Kortext's entire inventory.

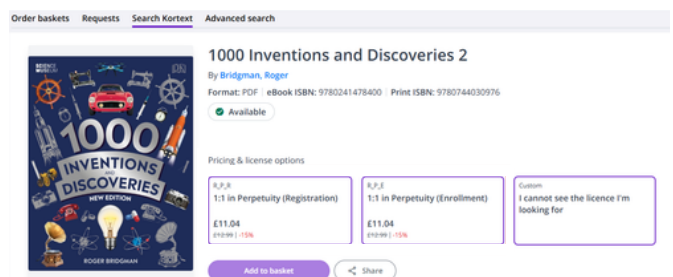
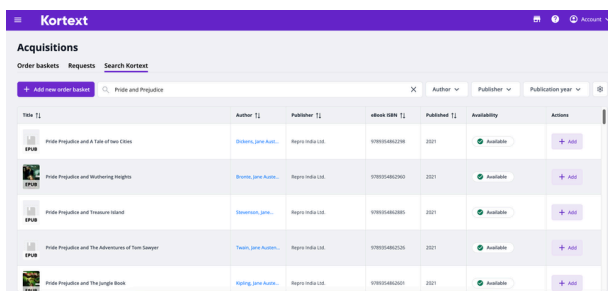


To conduct a search, enter a book title, author, ISBN or publisher in the search bar and click return.

You can even search for multiple ISBNs at once by separating the ISBNs by commas and a single space.

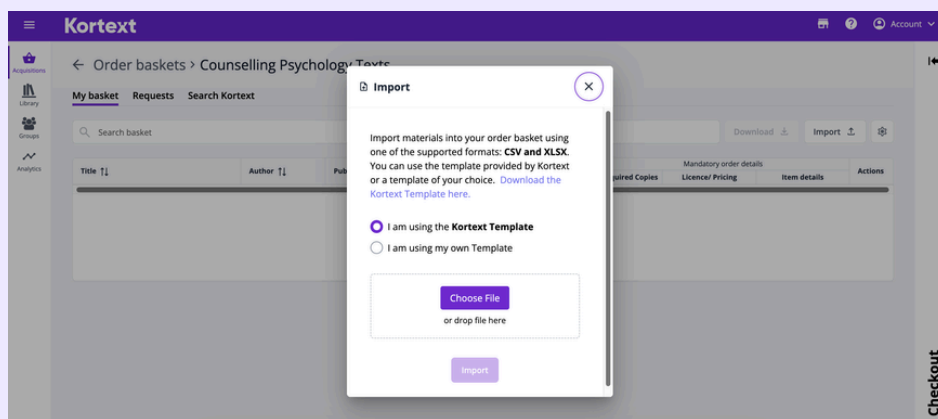
The results will appear below, and can be filtered by author, publisher and the year of publication.

To add a book to your basket, click **+Add** on the right of the screen or select the book's title on the left-hand side. Either selection will take you to the book information page where you can review bibliographic information and select pricing before adding the title to a basket.



## Importing a title or reading list

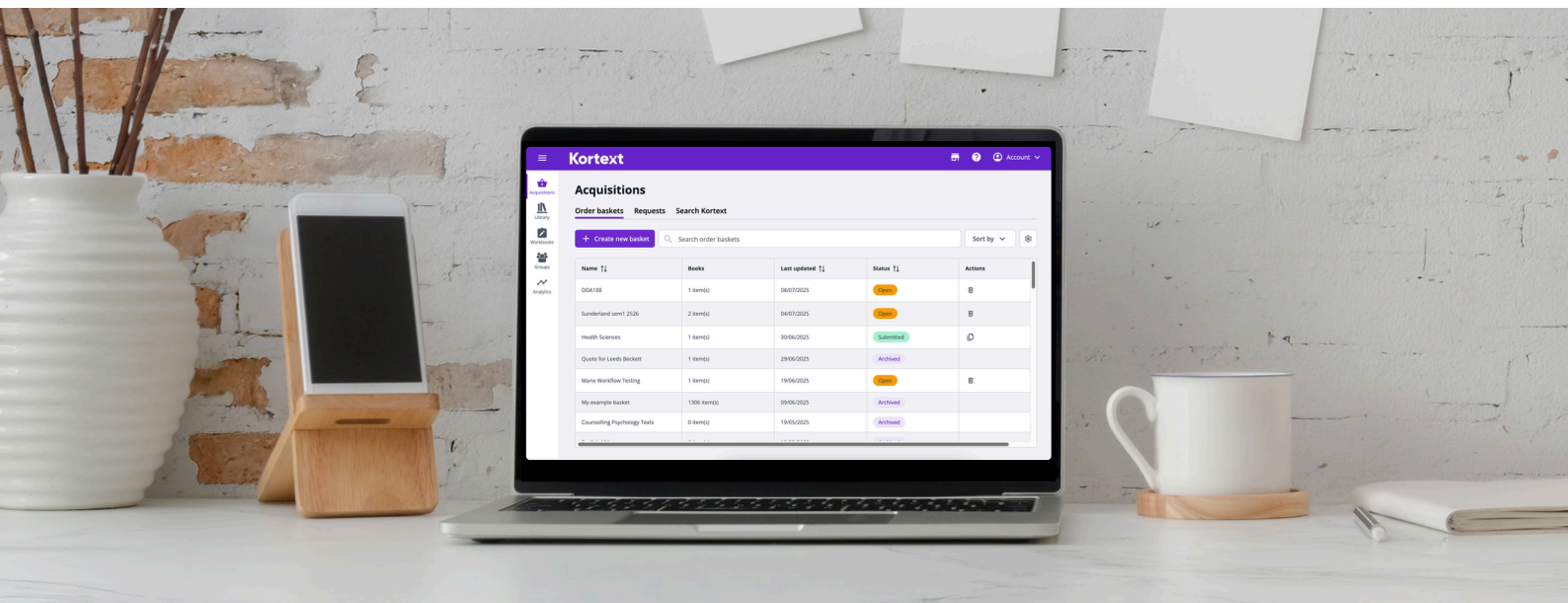
To conduct an automated search using an uploaded spreadsheet, click on **My basket**. On the right of the screen you will have the option to import. Click on **Import** to upload an Excel file or a .csv file containing your book list.



Once you've imported your book list, the results will appear on screen.

If a title is flagged as available, this means that it is already available on the Kortex **study** platform.

If you see any other status, then you will need to take appropriate action such as checking the ISBN or title is correct. You can remove these titles from your basket if you would like to submit the basket without delay.



**Kortext** Est 2013

© Kortext 2026