http://www.goalexandria.com/v7Docs/index.php/Explore_Builder

Explore Builder

Customize your search interfaces with Explore Builder.

Overview

From Tools, open Explore Builder. On the left is the list of Explore panes, and the right shows the currently-selected pane. A pane is a set of buttons. Each button can have an image and text and perform a certain action.

A button can display a message, or navigate to specific items in your catalog, to predefined searches, to saved lists, to external websites, to other panes in Search, to panes in Explore, to Bulletin Boards, and more— possibilities are endless.

The name of the pane is at the top, and below that is the pane link. You can use this to link to this Explore Pane from Bulletins or from your website or wherever.

Global & Local Panes

There are two classifications of Explore panes. Note in the list on the left how some panes have a bullet point and some don't.
The bulleted panes are what are called Global Panes, while the other ones are site specific and can only be viewed and edited by people at your site.

If you are on a Central Union, you may not see the bulleted panes right away; come down to the gear menu at the bottom and select Show Global Panes. You can always Hide them again.

COMPanion provides a number of Global Panes for you to use or customize, and we can update them. However, once you make changes to a default pane, we will no longer update it. You can duplicate one of these panes to customize it, then the original will be maintained and updated.

When you duplicate a pane, it becomes a local pane for the site you are logged in to. If you log in to the Union site, it will remain a global pane.

Researcher Pane

As you probably know, you can directly access various modules of Alexandria by modifying the website URL, for example dash /reports takes you to the Reports module. The 'landing page' if you will is what is called Researcher.

In Explore Builder, the Researcher pane is bolded, and you can modify it like any other pane.

You can also create a completely new pane.
For example: Duplicate the Researcher pane, give it a new name, add a button for your *School's Website*, and Save the pane.

Now select the pane and go to the gear menu at the bottom, and choose Set as Researcher Pane. Your new pane is now bolded, and the 'landing page' for your site is now the pane you created.

Edit Panes

Now on to the fun part—editing panes.

Explore Builder lets you customize the starting or Researcher pane (like we just did), the panes in the Search interface, and the panes in Explore.

In your Researcher Preferences, on the left, click on Search. You can choose to show the Top and Bottom Explore Panes, and you can select which pane it will use.
Click on Explore. Here, you can Select the Starting Pane for Explore.

Back in Explore Builder, edit any pane by clicking on it and making changes on the right. Drop in an image to create a button, or click on the square and enter the label.

Choose an Action for the button, such as Open URL where you would then fill in the URL, and you can choose to Open the URL in a new tab or browser window.

If you create a button to Perform a Search, you will enter the search term in the box. This supports search strings, and Boolean operators for example ((smart::*germany*) && (smart::*japan*))
Learn more about search strings here: http://www.goalexandria.com/v7Docs/index.php/Search_Strings

To remove a button, click on it and use the gear to Clear the Button or to Clear the Icon Only.

Another way you can add buttons to a pane is by using Copy From Pane. When you click this button, it opens a drawer that will show any pane selected from the left.

When you find what you are looking for, simply click and drag the button onto the pane you are modifying. Notice it does not remove it from the other pane.

You can choose to copy the Action and the Icon, or just the Icon. That way you can use any of these beautiful default icons for any kind of button you want.
Copy from any or all of the panes, and when you are finished, Save the pane, and Close the drawer.

Create Your Own Pane

Let's take a quick look at what you might do to create your own pane.

Click on the plus icon at the bottom left, and fill in the name of the new pane.
Drop images into the spaces to create buttons.

Click on a button to give it a Label, and choose an action such as Open URL. Type or paste any website URL, including linking to a Bulletin Board, a particular item in the catalog, or a saved list.

When you are finished, Save your changes.

Now to get this pane to show in Search or Explore, you can locate one of those Explore panes, and add a button.

For Action, choose Go To Pane, click on Select Pane, and locate the pane you created. If you created it while logged in to the Union site, you'll need to check Show Global Panes to see your pane. Ok. Save the pane.

To add the button to another pane, select that pane and Copy From Pane to simply copy the button you just created for the other pane. Save.

Now in Researcher, Search, or Explore, you can select that button, and access all the features of the pane. These link to various saved lists; you can go back and modify your pane at any time, for example to add a link to the Bulletin Board. There it is.

Share Your Pane

Now that you've created this lovely pane, you can share it. Use the URL to link to this pane from anywhere. Note that the link is not site specific, so if a librarian at a different site linked to this pane, any searches performed by buttons in the pane would be performed at *her* site, not yours.

You can also Export the pane, or all of the panes (including the Defaults). This is especially useful if you are configuring the interfaces for a Central or Distributed Union, as you can set everything up in one location then share the panes with the other locations.

Now you are an expert Explore Builder! The world is yours!

But if you need help, COMPanion Tech Support is always here to help you out.
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