Explore Builder

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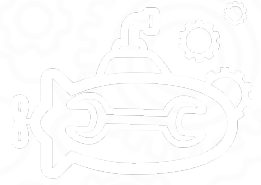Myra
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ⓘ This information has been moved to https://support.goalexandria.com/builder/explore-builder/

Researcher's Explore interface is fun and attractive—patrons simply click icons to *explore* their library resources. You can customize these icons, and sets of icons (called "panes") in **Explore Builder**. Include whatever resources your patrons need—that means Researcher modules like Search or Scout; links; popup messages; instant searches; and more. Explore Builder lets you set up endless possibilities for your patrons, by linking to other panes. You can even choose the pictures and the text that will best engage *your* audience.

ⓘ Download all of our icon sets here!

Navigation

To access the Explore interface, add **/explorebuilder** to the end of your Alexandria URL.

The Explore Builder window consists of two distinct areas:

- The **Panes List** on the left is essentially a list of the default, global, and local panes used to customize the Researcher's Explore interface. Select a pane from this list to display the contents of that pane (e.g. the buttons, icons, and actions) in the Explore pane to the right.

- The **Explore** pane on the right consists of the Explore Pane Buttons/Actions/Icons section where the contents of the selected pane are displayed—in full—allowing you to modify or remove them completely.

Explore Builder

Last Up

⚠️ **A Note for Centralized Catalog Users**

If you are Centralized Catalog, each time you access the Explore Builder, it will default to whichever site you are logged into, depending on the sites that you, as an operator, have permission to access (review Site Access for more information). Therefore, you may have access to multiple sites, but not all the sites defined in Sites Management. To create **Global** panes, log in to the union site, where you can create a default Explore interface, which can also be shared with individual sites.

Panes List
Panes List

The left-hand side of the module contains the Panes List, where all the Explore panes matching your Find criteria will be displayed. This section also contains shortcuts where you can Add or Remove Explore panes.

The default contents of the Panes List will be your local (i.e. user-created) panes in alphabetical order. If there are no panes in the Panes List when Explore Builder is accessed, COMPanion can provide you with the global Explore panes to use as reference or examples; if they appear hidden, select Show Global Panes from the Actions menu.

Select a pane from the Panes List to display the contents of that pane (e.g. the buttons, icons, and actions) in the Current Pane section (i.e. the right-hand portion of the Explore Builder)

Controls

The control strip situated below the Panes List contains tools that useful for adding, duplicating, importing, exporting, or removing Explore panes.

Add. Create a new Explore Pane by clicking the **Add** button. Provide a name for your new pane (required). The name can be changed later.

Remove. This selection completely removes the selected pane from the Panes List. This can not be undone, so think twice before making this selection. If you're not sure, you may want to Export the pane first for archive and backup purposes. The default Researcher pane can not be deleted or edited; however you can make a duplicate for which you can.

Actions. The Actions gear/cog menu contains specific actions and functions unique to the currently selected pane.

- **Duplicate Pane.** This duplicates the currently selected Explore pane, including all buttons, icons, and actions; duplicated panes are given the same name as the original unless otherwise changed.

- **Import Pane.** Browse your computer to locate and import the .txt file of a previously exported pane. A pane can also be imported by dragging and dropping the file onto the Panes field.

- **Export Pane.** This selection instantly queues the currently selected pane to export from Operation Management. Exported panes can later be imported back into Alexandria using the Import Pane selection (above).

- **Export All Panes.** This selection instantly queues your entire panes database (including Alexandria's global defaults) to export from Operation Management. Exported panes can later be imported back into Alexandria using the Import Pane selection. This is especially useful when configuring the Alexandria Explore interface in a Central or Distributed Catalog; you can create and configure your Explore interface in one location and then share it with others who will adopt your interface via Operation Management.

Explore Pane
Explore Pane

The Explore Pane comes loaded with clipart-quality icons contained in ready-made sample panes that you can adapt to create your own iconic interfaces; everything you need to customize and configure individualized Explore panes, buttons, icons, and actions. Selecting a pane from the Panes List will populate the Explore Pane section.

What is a pane?

Each Explore pane is a collection of buttons. Each pane can hold a fixed number of buttons in a 8 x 2 grid pattern. Blank or empty buttons act as placeholders for each unused position in the grid. Depending on the Researcher interface you're using (i.e. Search or Explore), you can display up to two Explore panes simultaneously.

What is a button?

Each button in a pane consists of an icon, descriptive label (located below each icon), and associated action that is performed when the button is clicked.

Click a button to select it; once selected, you may change the placement of the button in the pane. Simply click, hold, and drag a button from one location to another. If there's already a button at the destination location, the two buttons will trade places.

When you duplicate or move a button, its attributes are moved along with it.

What is an icon?

An icon is an image or picture used as a visual representation for each button. You can add icons by dragging-and-dropping images directly onto blank (or occupied) buttons—either directly from your operating system desktop or from the Copy From Pane dialog. The Explore Pane accepts most standard image files (e.g. SVG—preferably, GIF, BMP, PNG, JPG). If you're not using scalable vector graphics (i.e. SVG), make sure that your icons have dimensions no larger than 90 pixels wide by 90 pixels high for optimal quality.

What is an *action*?

An *action* is the functionality that is performed when a button in the **Explore** interface is clicked by one of your patrons. These actions can include display messages, opening outside URLs, performing **Researcher** searches, or linking to other, existing **Explore** panes.

Settings

The Explore Pane contains the following options:

- **Pane Name.** Provide the Explore pane's name (required). This name is essential when selecting the default Search and Explore starting panes in your Researcher Preferences or when assigning buttons the Go To Pane action. They also appear above the pane in the Explore interface when the pane is displayed. The site that this pane belong appears to the right of the pane name field (e.g. COMPanion Demonstration Library).

- **URL.** Displayed directly beneath the pane name field, this non-editable URL provides a direct link to the Explore pane in a new browser tab. Use this to preview how panes will look and behave in the Explore interface.
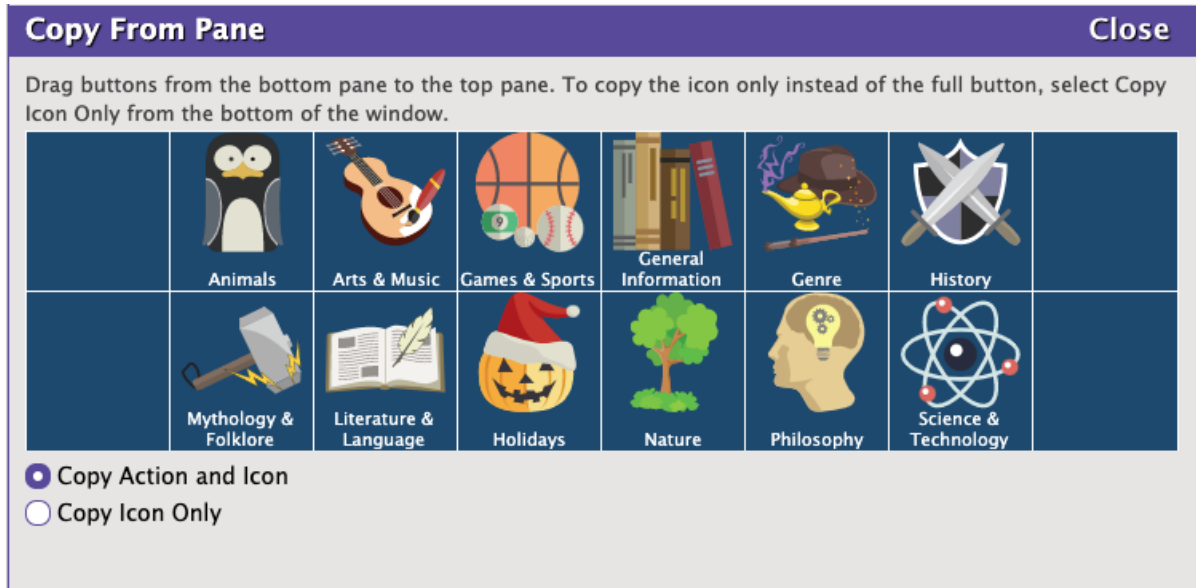
Copy From Pane
Copy From Pane

The bottom of the Explore Pane includes the Copy From Pane option. When clicked, the Copy From Pane slides up, allowing a "secondary" pane to be selected from the Panes List while retaining your "primary" pane up top. When the Copy From Pane drawer is open, it obscures the Actions options (described above).

However, this allows you to copy (via drag-and-drop) hand-picked buttons (including their actions and/or icons) from the bottom Copy From Pane onto blank (or occupied) buttons on the top Explore Pane. Whenever a button is dragged from the Copy From Pane onto an existing button in the "primary" Explore Pane, it is replaced in its entirety.

When you have finished copying buttons from one pane to the next, click Close to collapse the Copy From Pane. Then, you'll be able to individually modify the icons, actions, and the placement of the buttons in the selected Explore Pane. Alexandria will remember and restore the last pane you had selected the next time you use Copy From Pane.

Settings

Among other things, the Copy From Pane settings allow you to determine whether you'd like to copy the button icon only, or all associated button actions.

- **Show Global Panes.** When the Copy From Pane is active, the Show Global Panes option becomes available at the bottom of the Panes List. Checking this box shows the default global Explore panes, loaded with clip art-quality icons in ready-made sample panes that are easy to adapt into your own iconic interfaces.

- **Copy Action and Icon**. If you would like to copy both the icon and all associated button actions, select the Copy Action and Icon radio button at the bottom of the pane before you drag-and-drop.

- **Copy Icon Only.** If you would like to copy only the icon instead of the full button, select the Copy Icon Only radio button at the bottom of the pane before you drag-and-drop.