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Lots of Links

Creating Interactive Analytics Dashboards

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Overview

- ▶ Linking methods require completely different approaches, depending on your target!

Linking Type	Works in	Does Not Work in
Action Links	Dashboards, Analyses	Exported output
Excel HYPERLINKs	Excel	Analytics views
Full Links	PDF	Analytics views

- ▶ Haven't reviewed visualizations

Links

Why Link from Analyses?

- ▶ From Alma to
 - Primo full record view, such as a new resources list
 - AlmaD collection
- ▶ From Esploro to portal view
- ▶ To any to external website using analysis fields, such as
 - From Esploro to publisher landing page, using DOI
 - From Esploro to Google Scholar, using DOI
 - From Esploro to Scopus author search, using author name

How to Create Any Links

- ▶ Know your *base URL*
- ▶ Know your *parameters* and/or URL format after base URL
- ▶ Ensure any *fields* used in URL are in analysis
- ▶ Know how to deconstruct and reconstruct your URLs
 - https://drexel.primo.exlibrisgroup.com/discovery/search?vid=01DRXU_I NST:01DRXU
 - <https://scholar.google.com/scholar?q=10.1002/elps.200600808>

You're In Control! (Usually)

- ▶ Say you have a link like: [https://\[your-domain\]/discovery/search?query=any,contains,organic&tab=Everything&search_scope=MyInst_andCI_ResearchOnlyInventory&vid=01DRXU_INST:01DRXU&offset=0&pcAvailability=true](https://[your-domain]/discovery/search?query=any,contains,organic&tab=Everything&search_scope=MyInst_andCI_ResearchOnlyInventory&vid=01DRXU_INST:01DRXU&offset=0&pcAvailability=true)
- ▶ **Not ALL pieces are required**
- ▶ **The order of the sections can be changed**
- ▶ This link has same result: [https://\[your-domain\]/discovery/search?tab=Everything&search_scope=MyInst_andCI_ResearchOnlyInventory&vid=01DRXU_INST:01DRXU&pcAvailability=true&query=any,contains,organic](https://[your-domain]/discovery/search?tab=Everything&search_scope=MyInst_andCI_ResearchOnlyInventory&vid=01DRXU_INST:01DRXU&pcAvailability=true&query=any,contains,organic)

Sampling Common URLs

(in Primo, must know your view vid)

- ▶ Primo – Alma Record

https://drexel.primo.exlibrisgroup.com/discovery/fulldisplay?vid=01DRXU_INST:01DRXU&docid=alma991004741779704721

- ▶ Primo – Collection

https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId=81340139860004721

- ▶ Esploro – Asset

<https://ResearchDiscovery.drexel.edu/esploro/outputs/991014877956104721>

Linking Methods in Analytics

How to Create Excel Links

▶ In Analytics:

- '=HYPERLINK("https://drexel.primo.exlibrisgroup.com/discovery/collecti
onDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collect
ionId='
- || "Bibliographic Details"."Collection Id"
- || '"', "'
- || "Bibliographic Details"."Collection Name"
- || "')'

▶ In Excel

- =HYPERLINK("https://drexel.primo.exlibrisgroup.com/discovery/collectio
nDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collecti
onId=81340139680004721", "American Womens Hospitals Service")

Excel Hyperlink Tips

- ▶ Recommended: export to Data > CSV > right-click on exported file > select Open in Excel (opens links correctly, but long number like ID opens in scientific notation format)

Formula Bar: =HYPERLINK("https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId=81340100010004721", "Drexel family home albums")

B	C	D	E	F	G	H	I	J	K
FY Items	Parent	Collection Name	Collection ID						
0	Drexel H	Drexel family home albums	8.13401E+16						
11	Drexel H	Drexel family collection	8.13401F+16						

- ▶ Does NOT translate smoothly to any other format (Excel, PDF, ...)

FY Items	Parent	Collection Name	Collection ID
0	Drexel History Collection	=HYPERLINK("https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId=81340100010004721", "Drexel family home albums")	81340100010004721
11	Drexel History	=HYPERLINK("https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId=81340100020004721", "Drexel family home albums")	81340100020004721

How to Create **Hardcoded Links**

▶ In Analytics:

- 'https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId='
- || "Bibliographic Details"."Collection Id"

▶ In Excel or a PDF

- https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId=81340100010004721

FY Items	Parent	Collection Name
0	Drexel History Collection	https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&
11	Drexel History Collection	https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId=81340100010004721
19	Drexel History	https://drexel.primo.exlibrisgroup.com/discovery/collectionDiscovery?vid=01DRXU_INST:01DRXU&inst=01DRXU_INST&collectionId=81340100010004721

How to Create **Action Links** (1)

- ▶ Click **Column Properties** > select **Interaction** tab > in **Value** section, select **Primary Interaction = Action Links** > in **Action Links** section, click **+** to add link
- ▶ Select “**Do not display in a popup if only one action link is available at runtime**” to limit clicks during run

Column Properties

Style Column Format Data Format Conditional Format **Interaction**

Column Heading

Primary Interaction Default (Drill) ▼

Value

Primary Interaction **Action Links** ▼

Action Links + x

	Link Text	Action	Show Link
	Add Menu Action Links		

Do not display in a popup if only one action link is available at runtime

Enable on Totals

How to Create Action Links (2)

- ▶ Click **Create New Action** button (little running person) > select **Navigate to a Web Page**
- ▶ In **URL**, paste your URL Template > click **Define Parameters**
- ▶ Below URL box, at left, *No Parameters* + > click +

Link Text | Action | Show Link

New Action Link ...

Link Text: [Display Text or URL]

Action: [Dropdown]

Show Link: Always Conditionally

Navigate to BI Content

Navigate to a Web Page

Invoke a Web Service

Invoke a .Java Method

Navigate to a Web Page

Enter the URL you want this action to display.

URL: [] **Define Parameters**

Define Parameters

To embed a parameter value anywhere within the URL, use the token @{Name} where 'Name' is the value specified in the Name column below. There is no limit to the number of parameters that can be embedded.

No Parameters +

Options... OK Cancel

How to Create Action Links (3)

- ▶ For all defined rows, check **Fixed** and **Hidden** (**Optional** unchecked)

Navigate to a Web Page

Enter the URL you want this action to display.

URL

Define Parameters

Define Parameters

To embed a parameter value anywhere within the URL, use the token @{Name} where 'Name' is the value specified in the Name column below. There is no limit to the number of parameters that can be embedded.

	Name	Prompt	Value	Fixed	Hidden	Optional
	1	<input type="text" value="Enter Prompt Here..."/>	<input type="text" value="Value"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- ▶ To add analysis field as query field, click down arrow in **Value** column (next to little yellow folder icon)

How to Create Action Links (4)

- ▶ Select **Column Value** > click down arrow on right side of box > choose required field ("Asset.Identifiers"."DOI", here)
- ▶ Add appropriate prompt to **Prompt** column (q, here)
- ▶ At window bottom, click **Options** button

The screenshot shows the 'Edit Action' dialog box with the following details:

- Value:** A dropdown menu is open, showing options: Value, Session Variable, Repository Variable, and **Column Value** (highlighted with a red box).
- URL:** `https://scholar.google.co.il/scholar?q=@{1}`
- Define Parameters:** A table with the following data:

Name	Prompt	Value	Fixed	Hidden	Optional
1	q	"Asset Identifiers"."DOI"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Options...:** A button at the bottom left of the dialog box, highlighted with a red box.

How to Create Action Links (5)

- ▶ Select **Open In New Window** at bottom > click **OK** 4 times, ending at analysis Criteria tab
- ▶ **SAVE!**

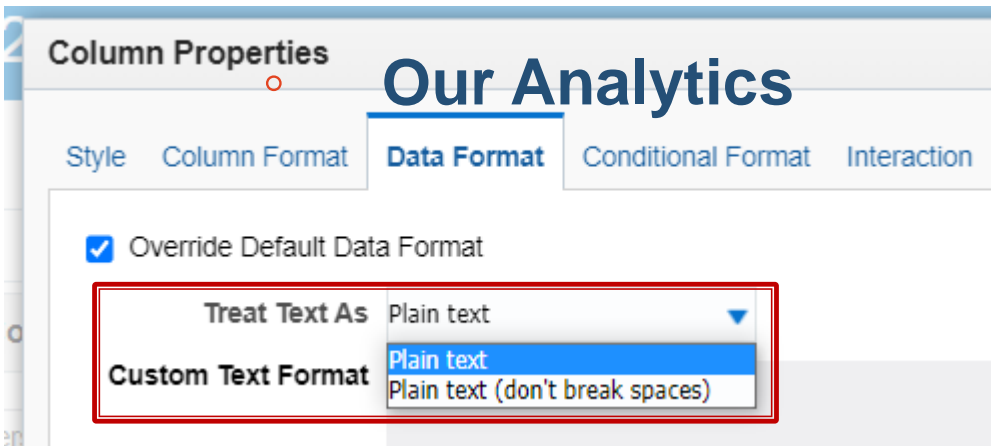
The screenshot shows a dialog box titled "Action Options" with a tab labeled "Invoke Action". The dialog contains the following options:

- Run Confirmation: Are you sure you want to invoke this action?
- Dialog Title: [Empty text box]
- Action Help Text: Enter the values for action parameters and execute
- Link URL: [Empty text box] **Label** [Empty text box]
- Execute Button Text: Run
- Open In New Window

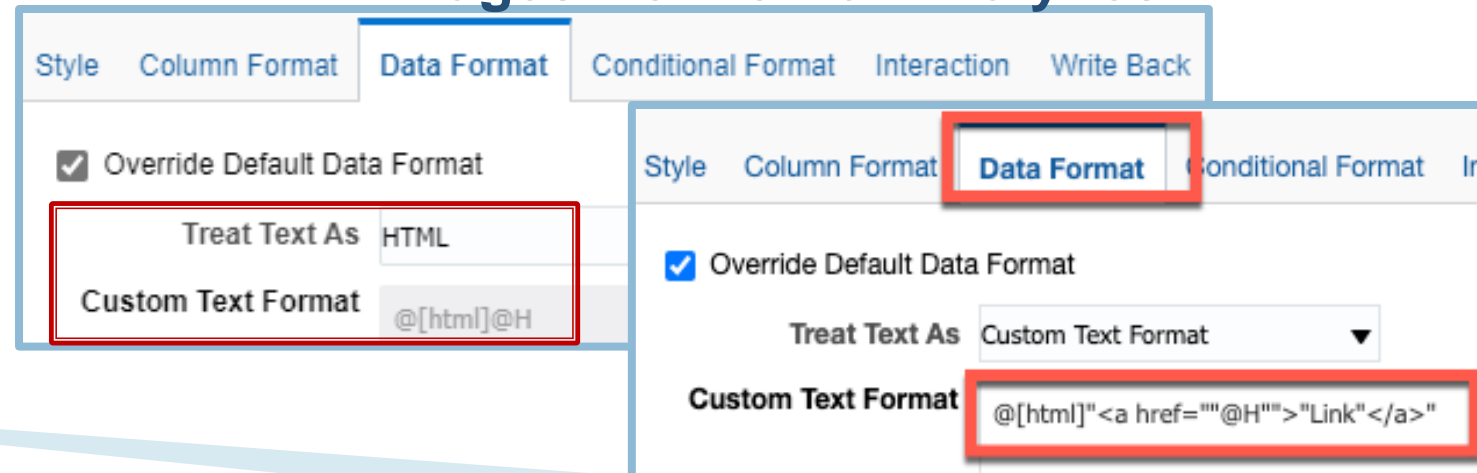
At the bottom right of the dialog are "OK" and "Cancel" buttons. The "Open In New Window" checkbox is highlighted with a red rectangular border.

Action Link Caveats

- ▶ Remember! These don't export – not to Excel, not to PDF
- ▶ Action links REQUIRE name-value pairs (aka Parameters)
 - Won't work in URLs *without* name-value pair parameters, like <https://doi.org/10.1002/elps.200600808>
 - In theory, OAS does provide a method, but it is not available in **our** version



Images from other Analytics



Resources

Existing Documentation

- ▶ Linking from Analytics Reports
 - How to create a link to rerun a prompted Alma Analytics report
 - How to make a direct link to an Alma Digital file via an Alma Analytics report
 - These may look the same, but ARE different:
 - How to create a link to Primo in an Alma Analytics report – creating links that works in Excel
 - How to create links from an Alma Analytics report to Primo – covers all 3 types ** *most similar to this presentation* **
- ▶ If you know any good how-tos, from any source, please share them – there's always more to learn

Thank you

Questions?

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