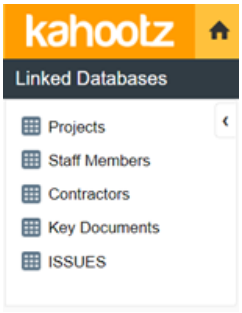
How-To use Linked Databases

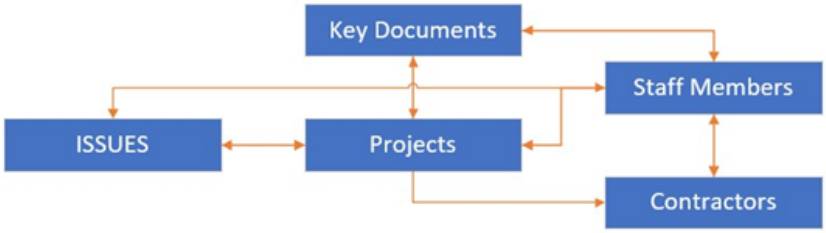
Chris Holt - 2022-03-31 - How-To

This KB article will provide step-by-step guidance regarding our newly released “Linked Databases” along with some useful tips & how-to create/add these columns to your current/new databases within your own Kahootz site.

Linked Database Columns allow you to link entries stored in one Kahootz database with other entries stored in the same and completely separate Kahootz databases, allowing you to view the data with a single click of a button.

> **Kahootz Tip:** Both databases must be in the same workspace.





Please review our Linking Databases Together KB article for full details.

How to Create/Setup and Manage Linked Database Columns

You can only add a “linked database column” to an existing database; therefore, please refer to this KB article on how to create a database.
If you’ve already done that, please continue with the below steps.

Once you have your database/s built with added row entries, lets now add some linking between them.

In this example, I will use a “**Projects”** database and a “**Contractors”** database to demonstrate the linking.

Projects

Contractors

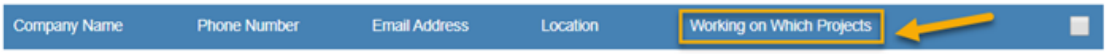
Open the database that you wish to apply a linked database column too, in this case – Projects.

1. Click "**Manage database"** at the bottom of the page underneath Actions.
2. Click **Add a New Column**
3. Select "**Linked Database"** from the column type drop-down list.
4. Provide it with a name, i.e. Main Contractor
5. Now select the database to link to using the "**Database to link to"** button, i.e. Contractors.
   Tip: You cannot change the database link later; you would have to re-create the whole column.
6. Choose to **Create a Reciprocal Column in the Linked-To Database** (see notes below for full details)
   If you've selected to create the reciprocal column, provide it with a name, i.e. Working on Which Projects
7. Choose to **Allow Multiple Values to be Selected** (see notes below for full details)
8. Choose to **Allow Users to click on a Linked Item to see more Details** (see notes below for full details)
9. Enable "**Value Required"** if needed.
10. Click **Save**.

The column has now added to the "**Projects"** database along with the reciprocal column on the "**Contractors"** Database.

Projects

Contractors

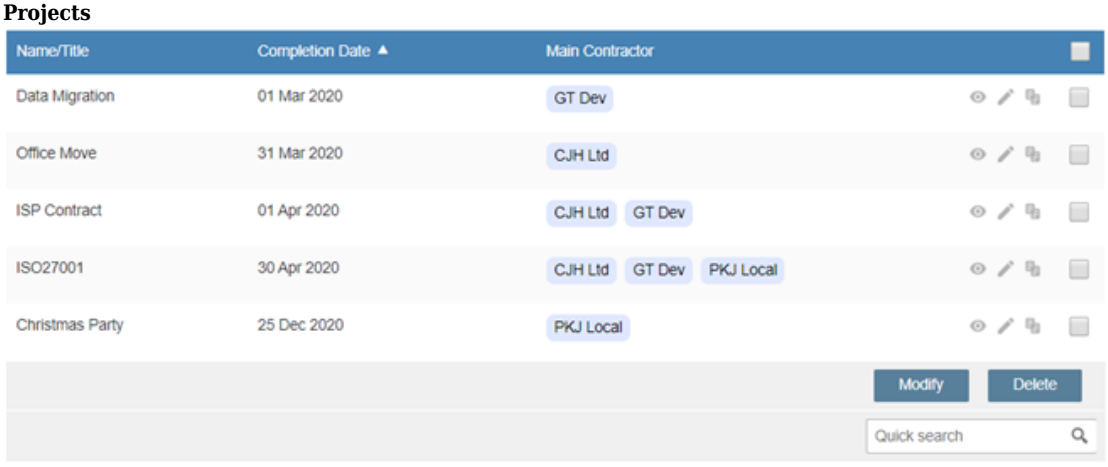


> **Kahootz Tip:** You can add as many linked columns to a database as you wish.

To now link entries, again for this example – I'll open the Projects database and assign the main contractor for each project.

1. Click "**Add a new entry"** or "**Edit"** if you wish to modify an existing row.
   If you've added a new entry, you'll need to fill in any other fields on the **Add Entry** page.
2. Click "**Link to an entry"** which will allow you to select entries from a list (see notes below for full details)
3. Press **Save**.
4. Repeat the steps until you've finished updating all the rows within your database.

Projects



As shown above, you can now see the "**Main Contractor"** linked database column within the Projects database, therefore, now open the database linked to it, and you'll see the reciprocal column called "Working on Which Projects" has been added automatically.

Database.

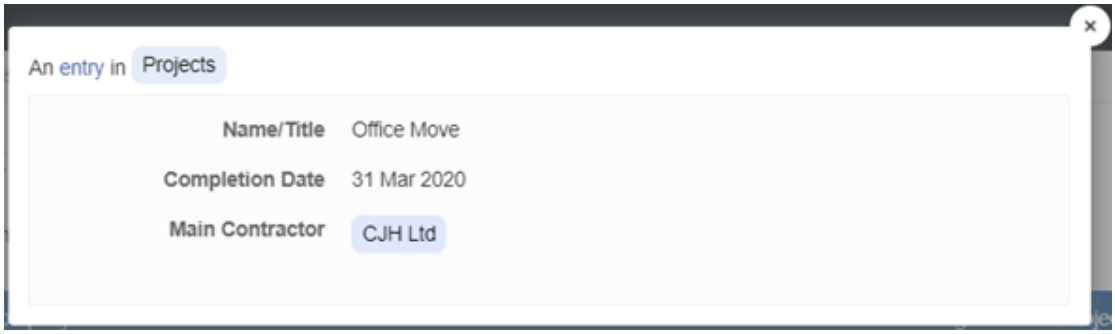
Contractors

Company Name	Phone Number	Email Address	Location	Working on Which Projects
CJH Ltd	01256 777 777	CJH@K.com	Basingstoke	ISO27001 ISP Contract Office Move
GT Dev	01420 987789	GT@A.com	Andover	Data Migration ISO27001 ISP Contract
PKJ Local	01488 123456	PKJ@I.com	Newbury	Christmas Party ISO27001

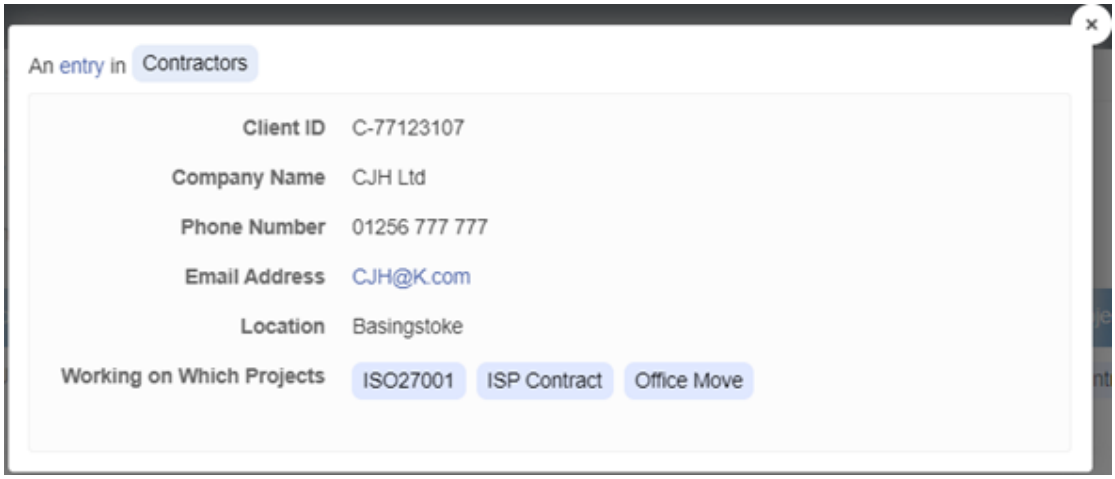
Modify Delete

Quick search

It's now as easy as clicking on the link "**Office Move"** to review the information.

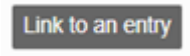


You can then click on "**CJH Ltd"** from the previous pop-out and view all the details about that particular entry as shown below.

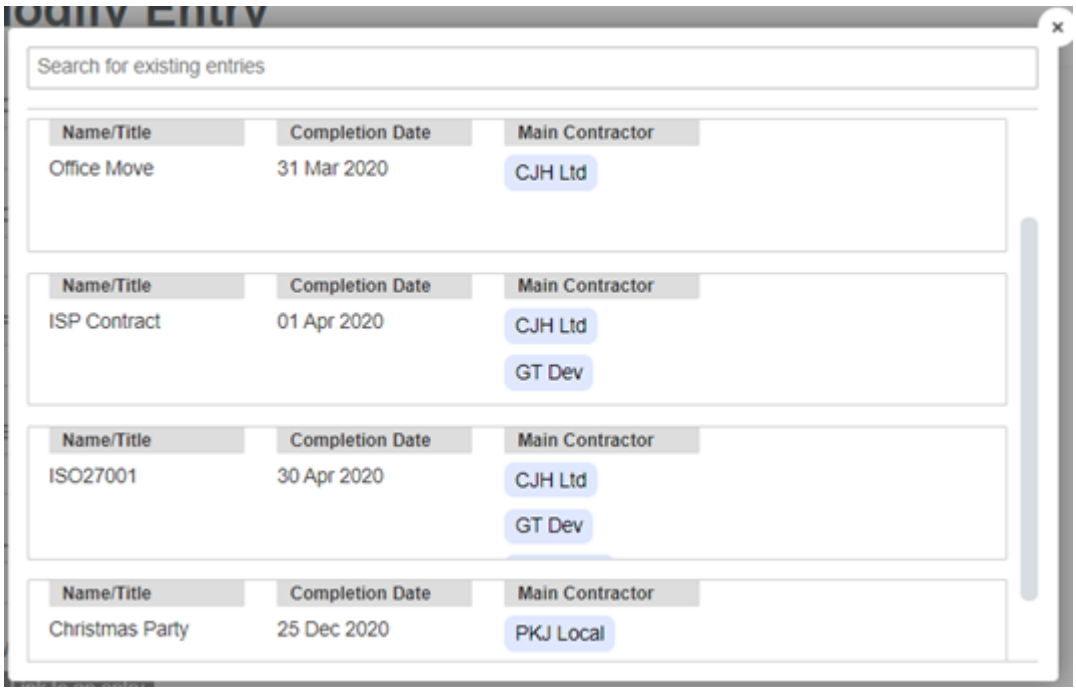


Linking & Unlinking Linked Database Columns

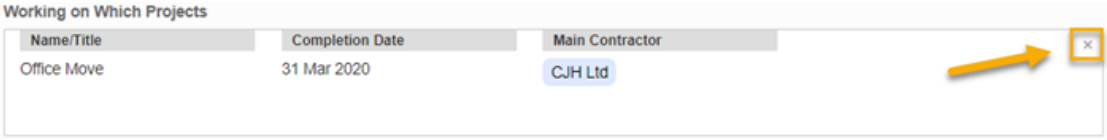
When you click "**Link to an entry"** it'll display a list of entries that you can select. You can search through the list to find the desired value more quickly; however, if you cannot find it, then I'm afraid you'll need to add the entry via the other database first. Once you've done that, come back and link the value.



To Link, an entry, click on the "**Link to an entry"** button and select from the list shown.



To unlink an entry, **edit** the row and under the Linked Database Column, click the '**X**' that you would like to unlink.



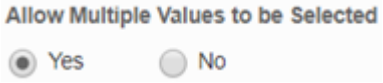
You can also point linked columns to the same database.

> **Kahootz Tip:** Once you delete the entire column it cannot be restored and all links are broken.

Create a Reciprocal Column in the Linked-To Database

If you select "yes" to this option, it'll automatically add a Reciprocal Column to the linked database of which will automatically update both database columns. Please note if you DO NOT create this at the time of creating the linked database column and later on find you want it added to the other database, it won't be automatically linked/updated.

Allow Multiple Values to be Selected



When this toggle is unchecked, if you've already added a linked entry to a row, then you won't see the "Plus + Buttons" that allows you to bring up the linked entry picker. It helps to ensure that you don't accidentally add multiple links to a column when you're trying to represent one-to-one relationships, however, if you don't allow multiple entries to be selected, then you're only allowed to choose one.

> **Kahootz Tip:** If you toggle off "Allow multiple values to be selected" in a column where multiple entries have already been linked, none of the entries will be removed when you save but you won't be able to add more.

Also, if a linked column is limited to only one entry, it can potentially end up with more entries than that because the column could have values added to it from the other linked "reciprocal column" database.

i.e. when you manage the "**Contractors"** database, you can only link (Office Move) to one project, however when you modify the "**Projects"** database (CJH Ltd) can end up managing various projects (**Office Move & ISP Contract**). Therefore, when you go back to the "**Contactors"** database, you'll now see (**CJH Ltd**) has been assigned to two projects, even know you could only add one from the "Contractors" database.

Allow users to click on a Linked Entry to see More Details.

If you select "yes", the linked data is shown as a pop-out window that you can easily click on to review the details directly from the linked database instead of having to change databases, a convenient and helpful feature.

If you select "no" then the linked data is shown as plain text, this can also be useful if you wish to use one database as a lookup list for another; however, this means you have to view the linked data from the other database manually.

Changing the "Main Column" that is Linked-To the Database

As shown in this example, the "**Main Contractors"** linked column shows the [Names] CJH Ltd GT Dev

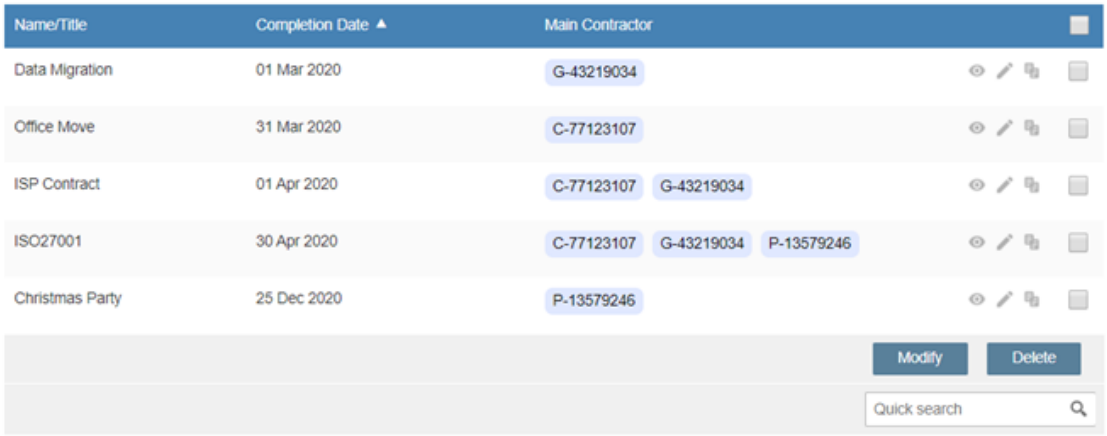
Whereas instead, you may need to use their Customer Number, PO, Client Ref or Unique ID.
Whatever it maybe you can easily change the **Main Column**.

Go to the database and click "**Manage database"** followed by "**Modify permissions and column display"** which you'll see a section called (**Column Display and Access Controls**) where you can change the "**Main Column"** value.

> **Kahootz Tip:** At the moment, only "text, long text, numeric, email or row number" can be classed as main columns which we'll look to extend in future releases along with the main column cannot be a locked column.

As shown, I've changed the "**Main Column"** radio button from [**Company Name to Client ID**] which now updates the database linked column to use the Client ID instead of their name of which you can see in the below screenshot.

Projects



> **Kahootz Tip:** If there is no "Main Column" then the Row ID is displayed by default, however, as soon as a new column is added to that database, it'll be marked as the main column if it is a valid main column type.

Access Control

When you view a database, you'll see the value for the "Main Column" on linked databases even if you don't have the permissions to view the linked contents or even the linked database. However, you will not be able to click through to see the actual "pop-up" details when clicking on the linked entry.

When you edit an entry, you can only link to entries in a linked database that you have visibility rights to see.

Searching

When you search a linked column, the search is a text search instead of a select drop-down.

Useful Information / Notes

• Editing of linked columns is not available on the "edit multiple entries" page at present (May 2020)

• Linked Database columns cannot be calculated columns.

• If you delete any linked data like the main or reciprocal columns, you cannot link them back together, you would have to delete them and recreate.

• The reporting functionality doesn't work for linked databases at present (May 2020)

• The Import/Export functionality isn't working at present (May 2020)

Related Content

- Evaluated Columns in a Database
- Calculated Columns in a database