

# EQUELLA<sup>®</sup>

## Contribution User Guide

*Version 6.4*

## Document History

Document No.	Reviewed		Finalised		Published	
1	7/05/2015		18/05/2015		18/05/2015	

May 2015 edition.

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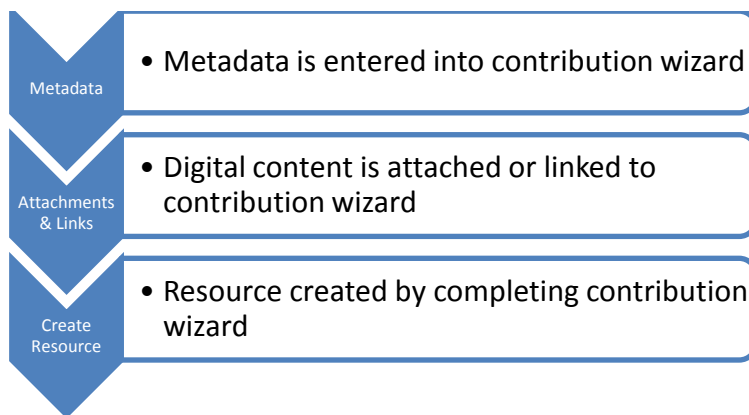
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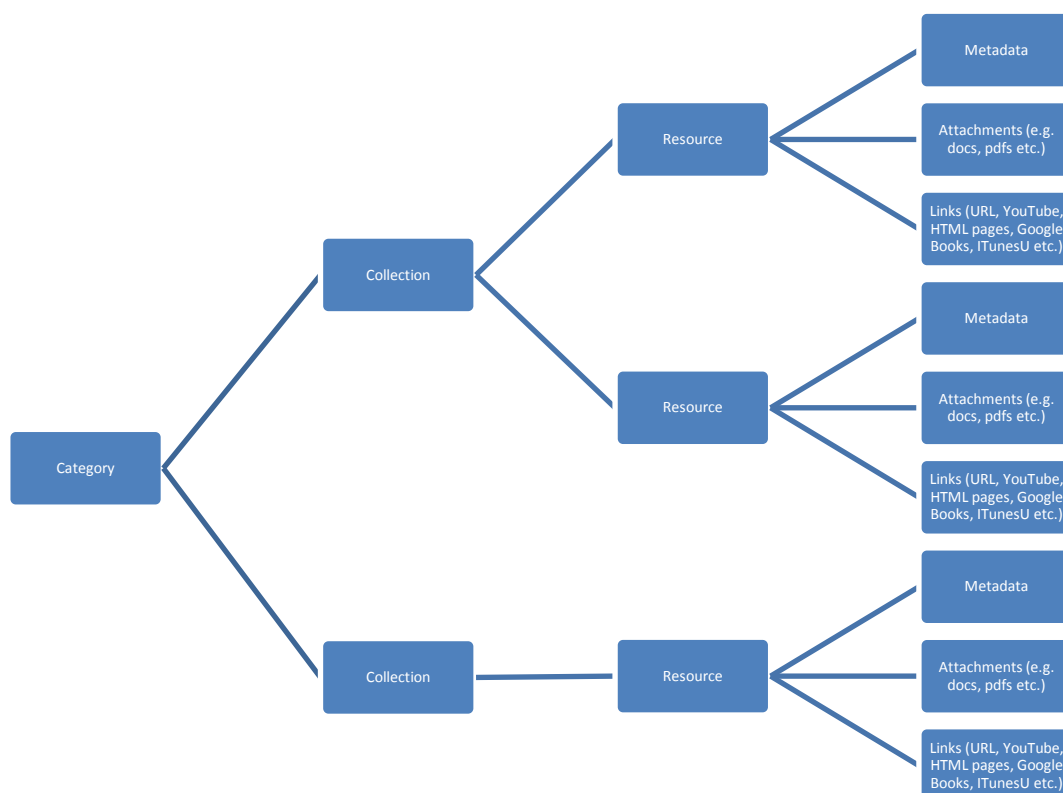
# Item contribution overview

The EQUELLA Digital Repository allows users to search, discover, create, store, manage, view and share resources. An EQUELLA resource is a grouping of metadata (information) and digital content. Resources enter the EQUELLA repository by contribution using a wizard based web form. The process is shown in the flow chart in Figure 1.



**Figure 1 Create resource process**

Resources are contributed to the repository using a customised contribution wizard. Each resource is stored in a **Collection** and each collection belongs to a **Category**. An example of the relationship between categories, collections, resources and attachments and/or links within the repository is shown in Figure 2.



**Figure 2 Relationships within the EQUELLA Digital Repository**

Contribution wizards are customised by adding different wizard controls that prompt users to input text, make selections, upload files, add links and various other actions.

The purpose of this guide is to demonstrate to users how to contribute resources to EQUELLA using a contribution wizard. Users will also gain a broad overview of the wizard control types that can be used when contributing items. For further information see *EQUELLA Collection Definitions Configuration Guide*.

Please note that this guide has been developed to best reflect the full capabilities of EQUELLA, and as such may differ in appearance to your own installation. Contact the system administrator for access to extra features or to reconfigure your installation.

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## EQUELLA Digital Repository

### To access EQUELLA

1. Open a browser and enter your EQUELLA URL (e.g. <http://equella.myinstitution.edu>).
2. Log in to EQUELLA to display the EQUELLA Dashboard page. An example is shown in Figure 3.

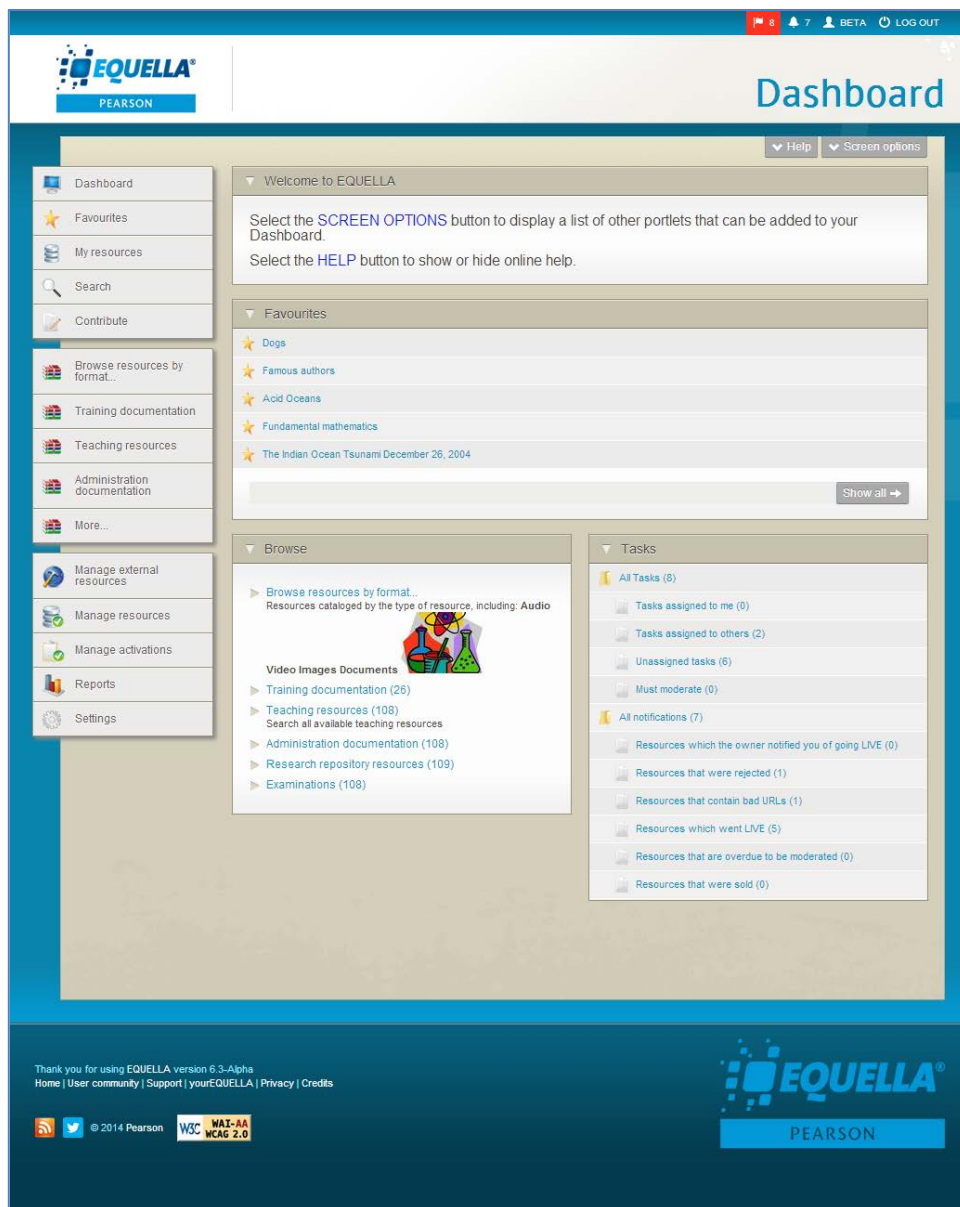
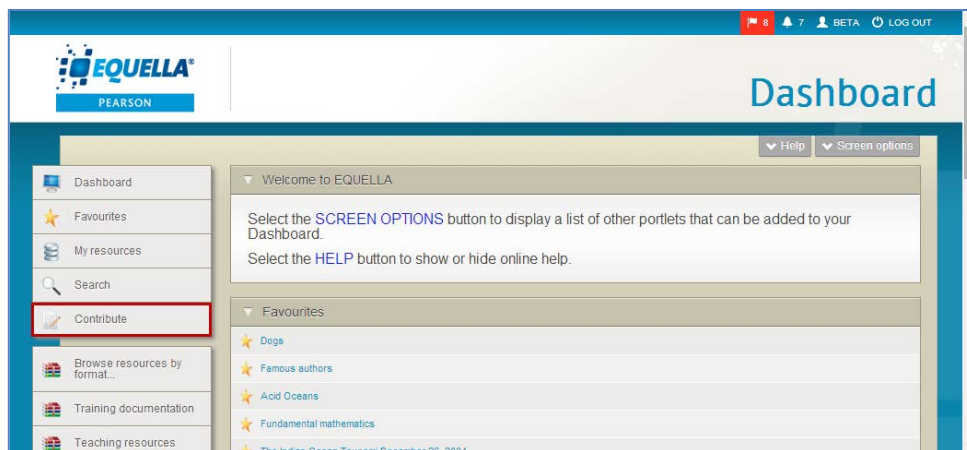


Figure 3 EQUELLA Dashboard page

## Contribute resources to collections

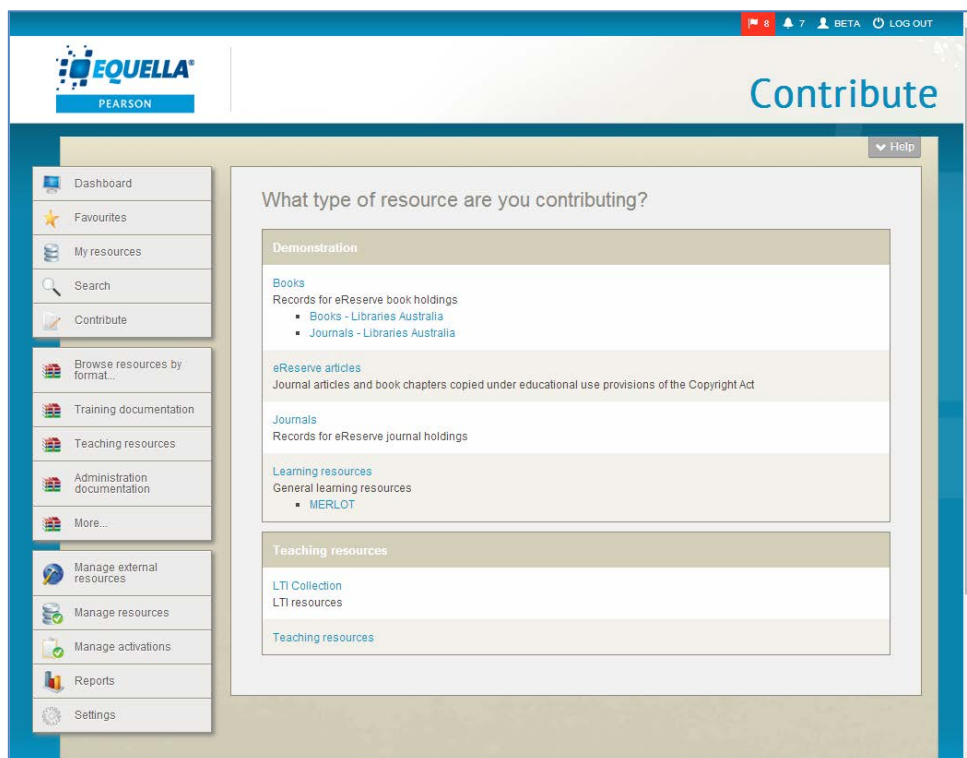
Every resource contributed to EQUELLA is saved in a collection, and each collection belongs to a category. There may be multiple collections and categories, and privileges may be set so users will see only relevant categories and collections. See *EQUELLA Security Manager Configuration Guide* for more information on security and privileges.

To access the **Contribute** page, select **Contribute** from the navigation menu, as shown in Figure 4.



**Figure 4 Contribute link**

The **Contribute** page displays, with available collections listed under their categories. In the example shown in Figure 5, there are two categories (Demonstration and Teaching Resources) with a number of collections associated with each.



**Figure 5 Collection page**

When selected, each contribution link opens the associated contribution wizard.

## *Contribution wizards*

Contribution wizards prompt contributors for details relevant to the resources being contributed to EQUELLA. The amount of information collected is set by the institution, but



the more metadata (information) collected for a resource, the more 'discoverable' it becomes in the EQUELLA repository.

The appearance and sequence of contribution wizard pages can be different for each collection, and can change according to:

- the type of user;
- moderation progress; and
- information previously entered in the contribution process.

In addition to collecting information, a contribution wizard may contain controls that allow users to:

- upload individual or multiple files, including zip files
- add YouTube™, iTunesU™, Flickr™, Kaltura and Google Book™ links
- organise uploaded items with a navigation tree
- import and export IMS, METS, QTI and SCORM packages
- add URL links
- create HTML pages
- select and add taxonomy terms.

## Contribution wizard pages


Contribution wizards can be a single page or multiple pages, depending on their configuration.

An example of a contribution wizard is shown in Figure 6.

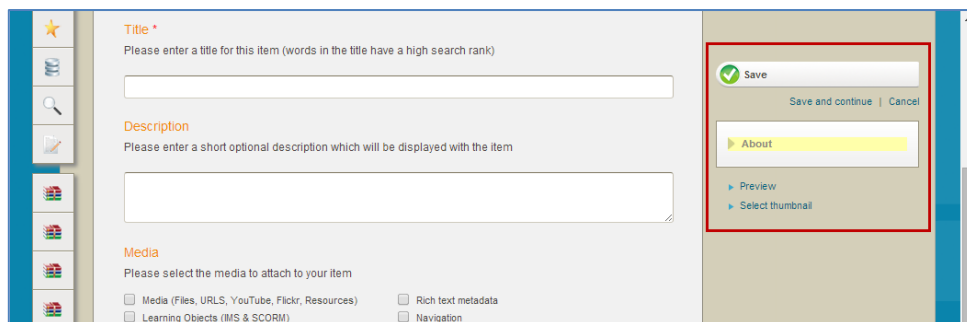
The screenshot displays the EQUELLA Learning resources contribution wizard. The interface includes a sidebar with icons for navigation and a main content area. The main content area is divided into sections: 'About' (Title, Description), 'Media' (Media, Learning Objects, Digital Rights Management), 'Resource type' (General knowledge, Required Reading, Exam Preparation, Assignment Related), and 'Class' (Select the classes for which this resource will be relevant). A 'Save' button is visible in the top right corner.

**Figure 6 Learning resources contribution wizard**

Contribution wizard pages are made up of the following elements:

- Contribution page name—this name also appears on the page links to the right-hand side.
- Wizard controls—various wizard controls may be displayed. See [Wizard controls reference](#) on page 50 for more information.
- Page control buttons—see [Page control buttons](#) on page 11 for more information.
-  **Save**—saves the resource to the selected collection.
- **Save and continue** – saves the resource as draft if it hasn't been saved before, or updates the existing record for pre-existing resources.
- **Cancel**—displays a confirmation dialog box. Click **OK** to cancel the current contribution.
- **Page label controls** – lists the names of the wizard pages as links.
- **Preview**—displays the resource as it will look if saved at this point.
- **Select thumbnail** – opens the **Select thumbnail** page (see [Select thumbnail link](#) on page 12 for further information).

*NOTE: The Save button and Save and continue, Cancel, page label, Preview and Select thumbnail links move if the page is scrolled so they will always appear in the top right-hand corner of the page. An example is shown in Figure 7.*



**Figure 7 Scrolling Save panel**

Contribution wizard controls can be dynamic, only displaying once a particular option is selected. This helps to collect meaningful data during the contribution process, while only showing the user relevant fields.

Using the example contribution wizard shown in Figure 6, once the Classification metadata checkbox is selected, an extra contribution wizard page is enabled. An example is shown in Figure 8.

The screenshot displays the EQUELLA Learning resources contribution wizard. The main content area is titled 'Contribute > Learning resources'. It contains several sections: 'About' with a mandatory 'Title' field (indicated by an asterisk), 'Description' with an optional description field, 'Media' with checkboxes for 'Media (Files, URLs, YouTube, Flickr, Resources)', 'Learning Objects (IMS & SCORM)', 'Digital Rights Management (DRM)', 'Rich text metadata', 'Navigation', and 'Classification metadata' (which is checked). 'Resource type' has checkboxes for 'General knowledge', 'Exam Preparation', 'Required Reading', and 'Assignment Related'. 'Class' has a 'Select a group' button. On the right, there is a 'Save' button, 'Save and continue', and 'Cancel' links. Below these are links for 'About' and 'Classification' (highlighted). At the bottom right, there is a 'Classification' button with a right arrow.

**Figure 8 Dynamic wizard control**

An asterisk after a field label indicates a mandatory field.

## Page control buttons

Links to the page names display on the right-hand side of the contribution wizard, and, depending on the wizard configuration, information can be added to the pages in any order.

The page control at the bottom of the contribution wizard may be labelled **Next** and **Previous** or the relevant page name, depending on how the collection definition is configured. See *EQUELLA Collection Definition Configuration Guide* for more information.

Click on either page link to display the page. An example is shown in Figure 9.

The screenshot shows the 'Learning resources' contribution wizard in the EQUELLA interface. The page has a blue header with the EQUELLA logo and 'PEARSON' text. The main content area is titled 'Contribute > Learning resources'. It contains several sections: 'Keywords' with a text input field; 'Learning Resource Type' with a dropdown menu showing 'No terms selected' and a 'Select terms' button; 'Format of files stored in this item' with a list of options (Audio, Video, Image, Document, Other) and a 'Select terms' button; and 'Aggregation level' with a dropdown menu showing 'Please select one'. On the right side, there are buttons for 'Save', 'Save and continue', 'Cancel', 'About \*', 'Preview', and 'Select thumbnail'. A red box highlights the 'About \*' button at the bottom right of the main content area.

**Figure 9 Display another contribution wizard page**

The page control button at the bottom of the screen now points back. (Note: The asterisk displaying after **About** on both page links is an indication that information has not yet been entered into a mandatory field on that page.)

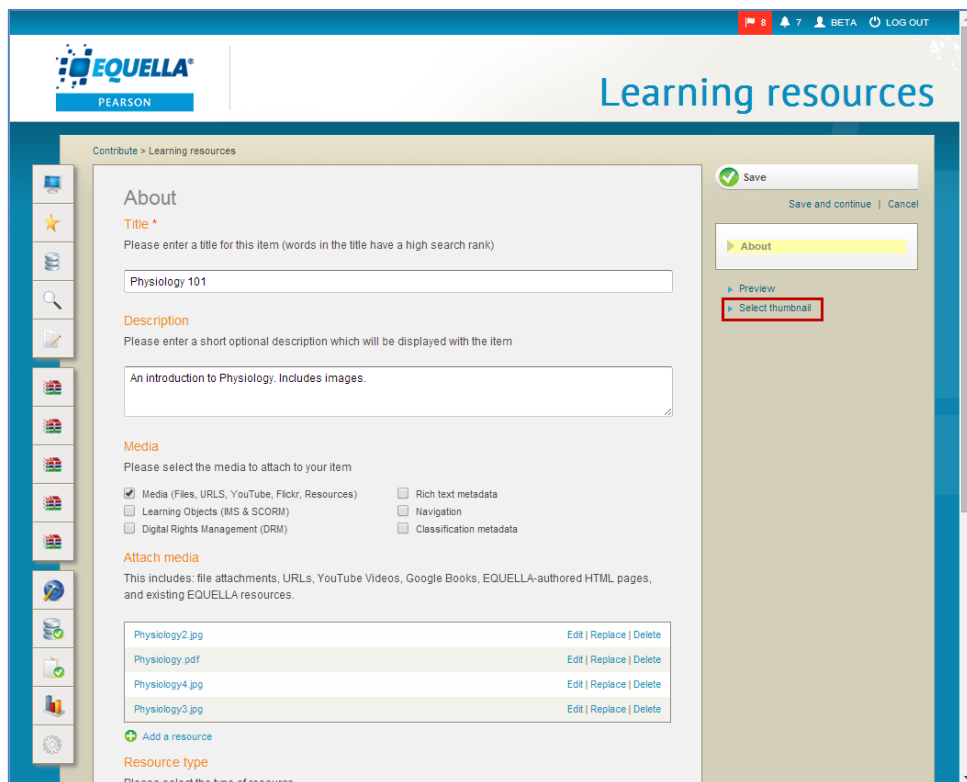
## Select thumbnail link

The **Select thumbnail** link enables users to choose which image thumbnail is displayed in the Standard and Images view search results pages.

*NOTE: The thumbnail and preview for the Videos view always defaults to the first video in the attachment list. To change which video thumbnail and preview displays on the Videos view page, the Reorder attachments function can be used to put the required video at the top of the list.*

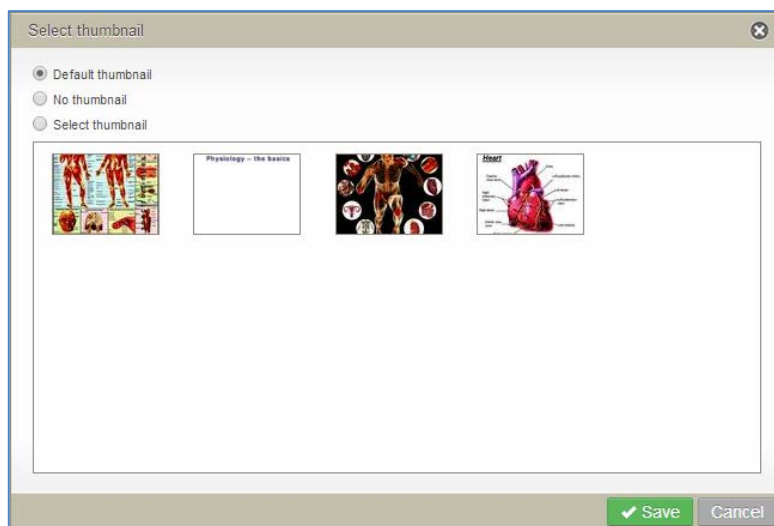
### To select a thumbnail

1. From the contribution wizard page, click the **Select thumbnail** link. An example is shown in Figure 10.



**Figure 10 Wizard page - Select thumbnail link**

2. Select the **Select thumbnail** link. This link can also be accessed during editing. The **Select thumbnail** dialog displays. An example is shown in Figure 11.



**Figure 11 Select thumbnail dialog**

All available thumbnails display.

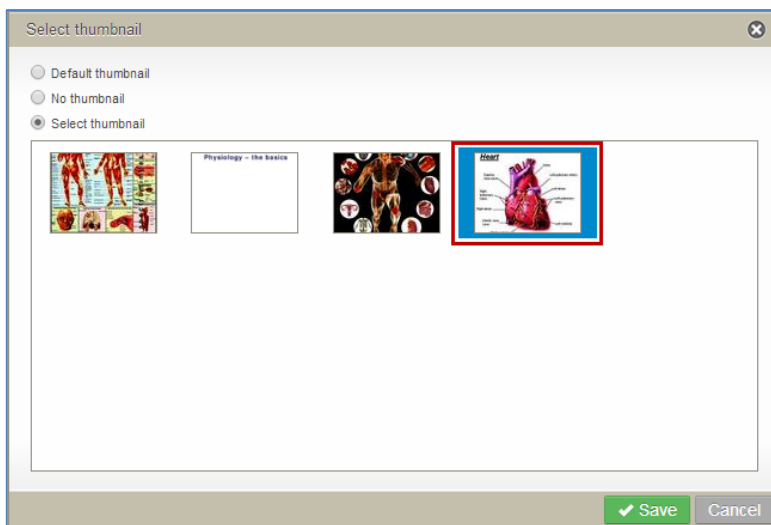
The **Select thumbnail** dialog displays the following options:

- **Default thumbnail** – this is the default value, and when selected the first *image* attachment thumbnail listed is used in the Images view. Additionally, when this option

is selected and there are multiple thumbnails available, a rotating thumbnail displays on the Standard results page.

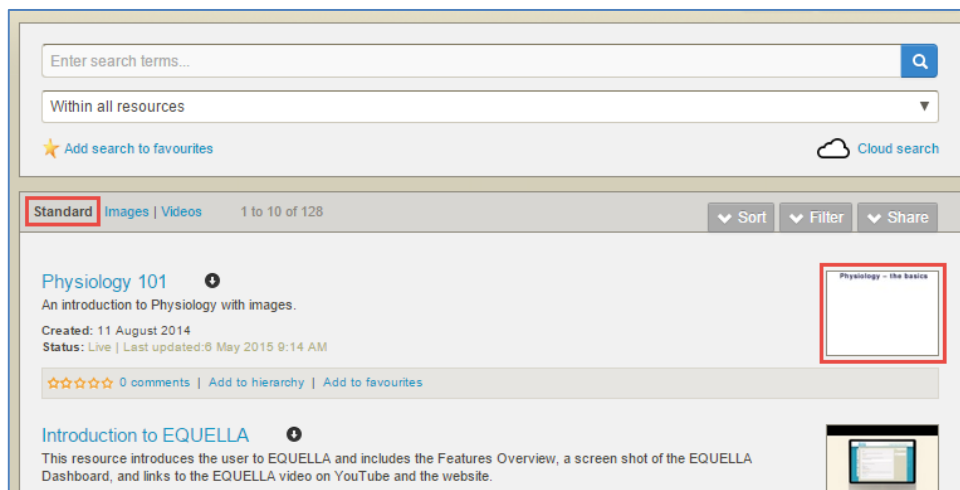
*NOTE: If images are reordered using the Reorder attachment function (see [Reorder attachments](#) on page 95), the image thumbnail that is moved into first place will be the thumbnail used for the Images view when this option is selected.*

- **No thumbnail** – when selected, no thumbnail is displayed on the Images page for this resource. That is, this resource is not represented on the Images view. Additionally, no thumbnail/s display for this resource on the Standard results page.
- **Select thumbnail** – when selected, the user can select the thumbnail they wish to use for both the Images view and on the Standard results page (image thumbnails will not rotate). An example is shown in Figure 12.



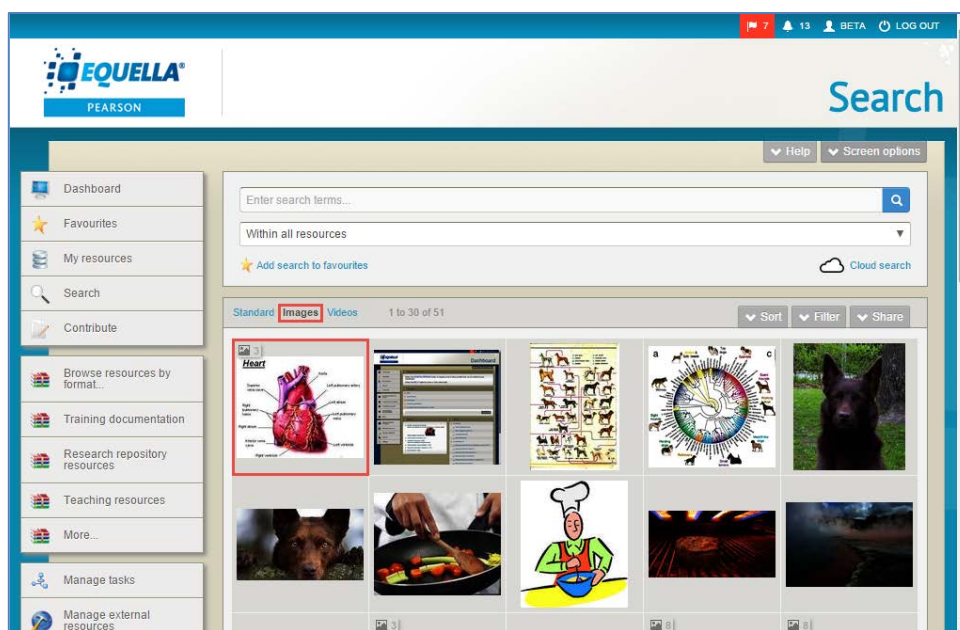
**Figure 12 Select thumbnail dialog - Select thumbnail option**

*NOTE: Thumbnails for file types other than images are also generated, and display as selectable options in the Select thumbnail dialog. If a thumbnail is selected for a file type other than an image, the resource will not be represented on the Images view page, as this view is restricted to image file thumbnails. However, the selected thumbnail will display beside the resource title on the Standard view page. For example, if a pdf thumbnail is selected, the resource won't be represented on the Images view page, but is listed on the Standard results page with the selected pdf thumbnail. An example of this is shown in Figure 13.*



**Figure 13 Standard view with selected pdf thumbnail**

Once saved, the selected image thumbnail displays in the Images view and on the Standard results pages. Examples are shown in Figure 14 and Figure 15.



**Figure 14 Images view - selected thumbnail**

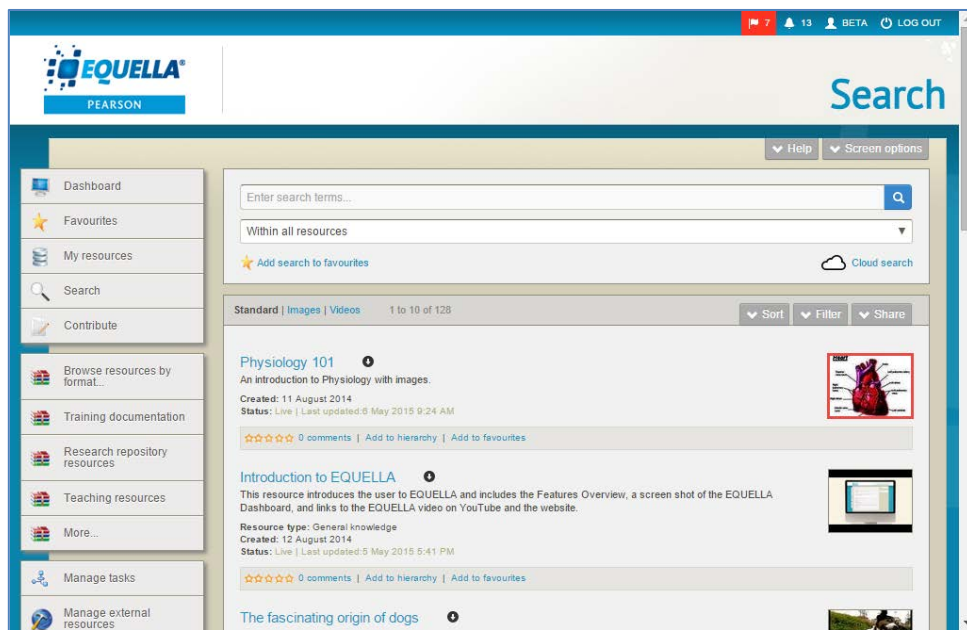


Figure 15 Standard view - selected thumbnail

## Contribute an example resource

To best illustrate the functionality of a contribution wizard, the process of contributing a resource is outlined below. Keep in mind that contribution wizards are highly configurable and will be tailored to meet the needs of different institutions so may look different from the example.

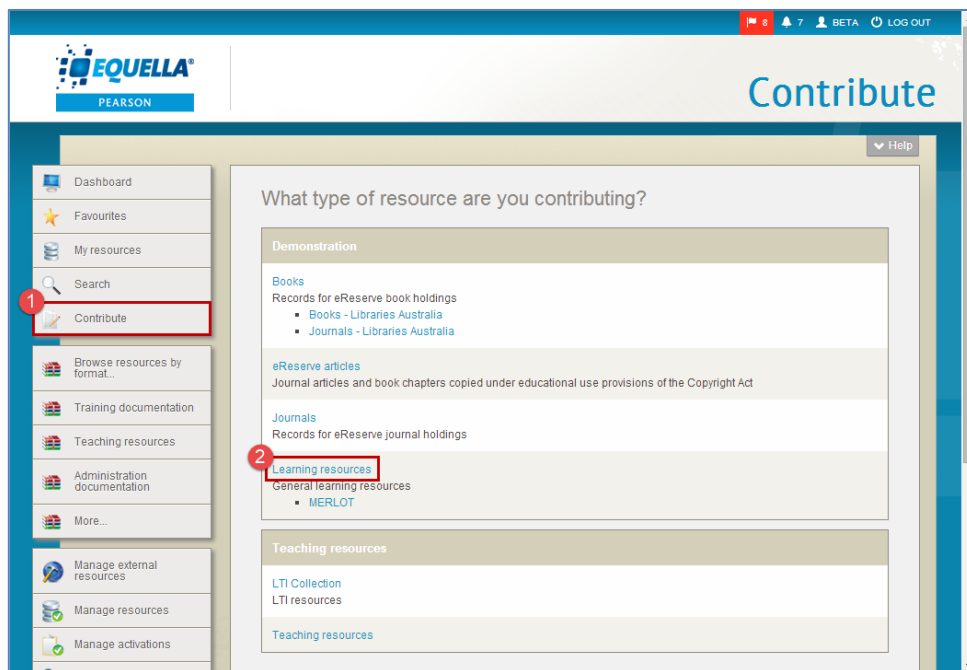
### Example

Contribute a resource to the **Learning Resources** collection titled **Introduction to EQUELLA**, add a description, a pdf document, an image file, a URL and a YouTube link, then save the resource.

### To contribute the example resource to a collection

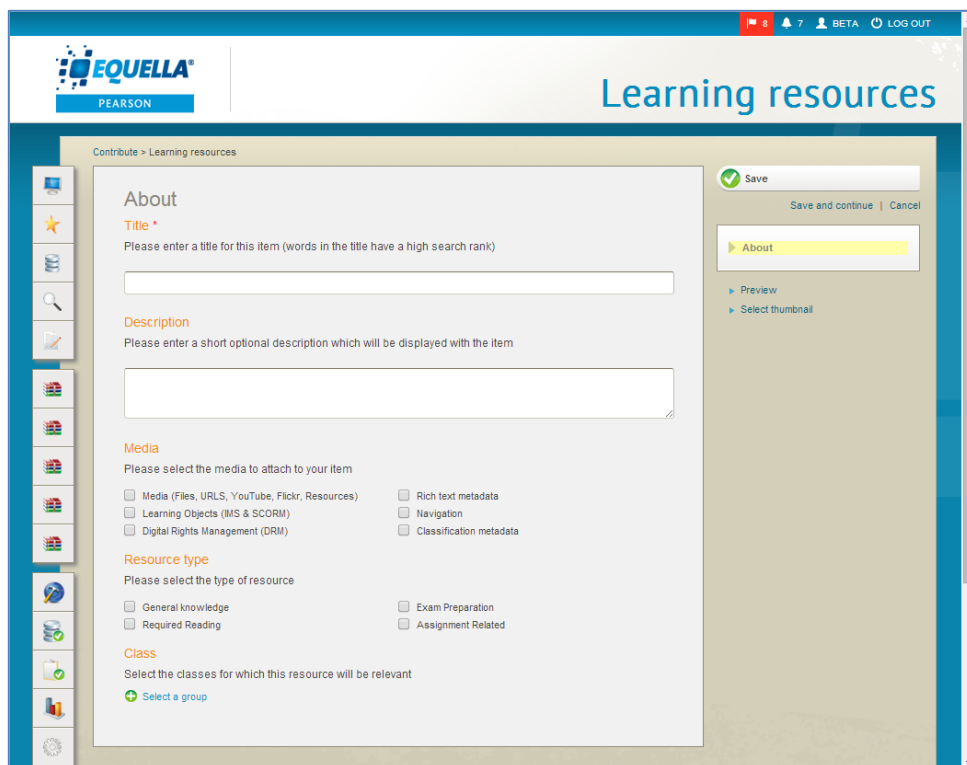
1. Select the **Contribute** link from the navigation menu.
2. Select the **Learning resources** link from the Demonstration category. An example is shown in Figure 16.





**Figure 16 Select Learning resources collection**

The Learning resources contribution wizard displays, as shown in Figure 17.



**Figure 17 Learning resources wizard**

The first page of a contribution wizard is typically an information collecting page, and can be labelled in a variety of ways, for example *Details*, *About*, *Basic Information*, etc. The first page in this example includes the following controls:

## Title and description wizard controls

The resource's title and description are typically **Edit Box** wizard controls that allow the entry of basic text. In the example shown in Figure 18, the **Title** field has been flagged with a red asterisk, denoting that the control is mandatory.

1. Enter the resource name in the **Title** field (e.g. *Introduction to EQUELLA*).
2. Enter a brief overview of what the resource is about in the **Description** text box. An outline of the attachments or links could be entered here, to give the 'discoverer' an idea of what the resource covers. This description displays on the search results page under the title and is used in searches to find matching results for terms entered in the Search box.
3. Select the **Media** checkbox. The **Attach media** section displays, as shown in Figure 18.

The screenshot shows the 'Learning resources' contribution wizard in the EQUELLA system. The 'About' section is active, showing fields for 'Title' (marked with a red asterisk) and 'Description'. The 'Media' section is highlighted with a red box and a red circle with the number 1. It contains a checkbox for 'Media (Files, URLs, YouTube, Flickr, Resources)' which is checked. Below this, there are checkboxes for 'Learning Objects (IMS & SCORM)', 'Digital Rights Management (DRM)', 'Rich text metadata', 'Navigation', and 'Classification metadata'. The 'Attach media' section is also highlighted with a red box and a red circle with the number 2. It contains a text area for 'No attached resources' and a link to 'Add a resource'. The 'Resource type' section is visible below, with checkboxes for 'General knowledge', 'Exam Preparation', 'Required Reading', and 'Assignment Related'. The 'Class' section is partially visible at the bottom.

**Figure 18 Attach media section**

4. Select the **Add a resource** link. The **Pick resource type** page displays, as shown in Figure 19.

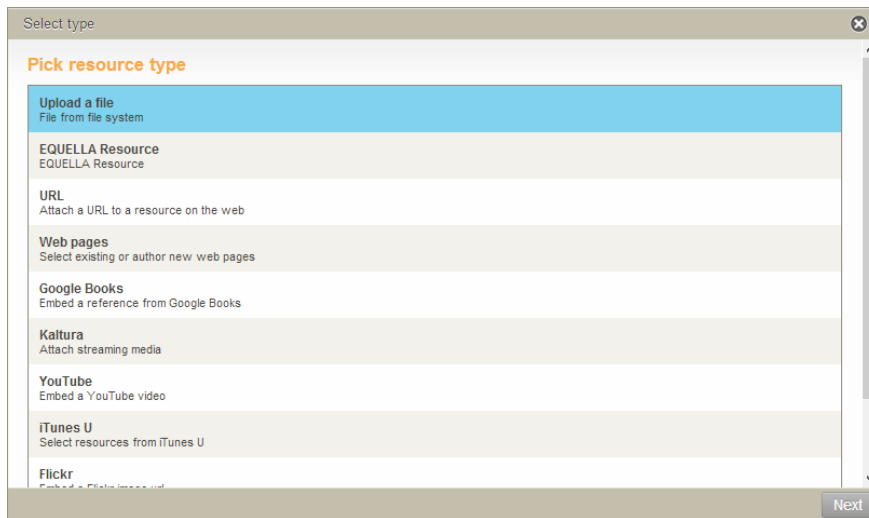


Figure 19 Pick resource type page

5. Select **Upload a file** then click **Next**. The **Upload files from your computer** page displays, as shown in Figure 20.

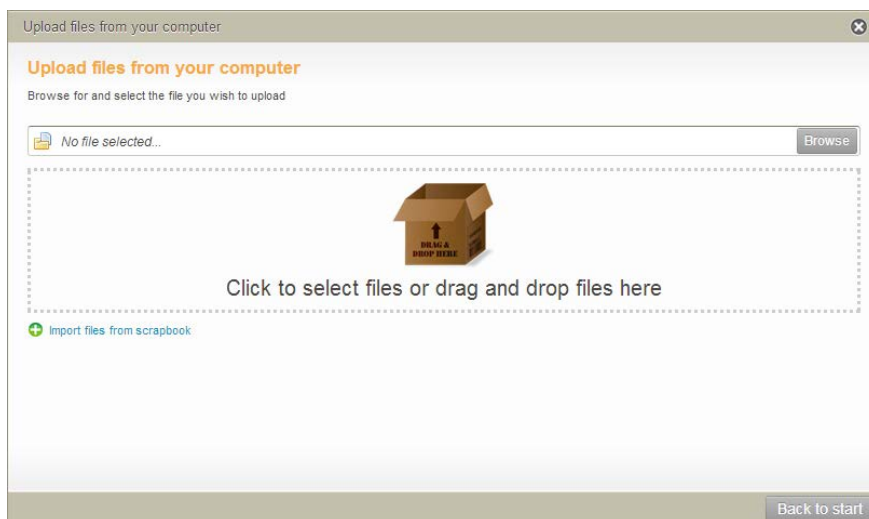
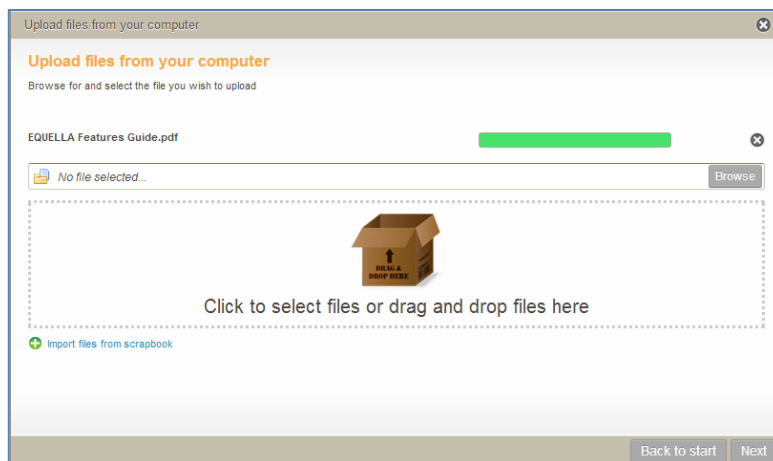


Figure 20 Upload files from your computer page

6. Either:
  - Click **Browse** to open the **Choose File to Upload** page, navigate to the required file (in this example *EQUELLA Features Guide.pdf*) then click **Open**. The **Upload files from your computer** page displays with the selected file listed, as shown in Figure 21.

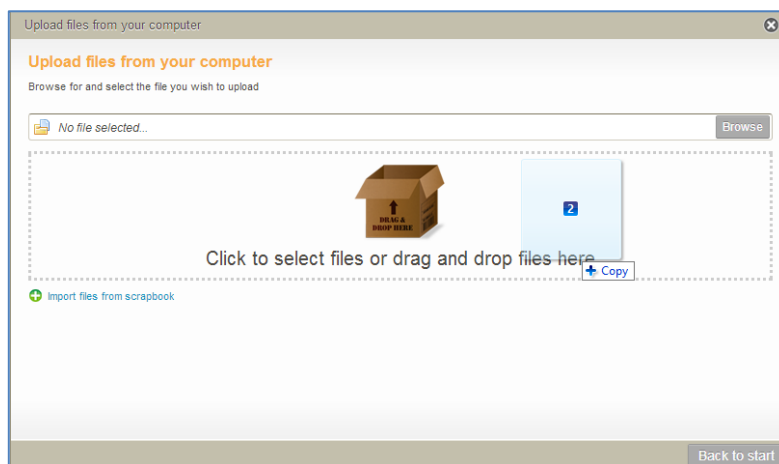


**Figure 21 File uploaded using Browse button**

**NOTE:** This method allows only single files to be uploaded with each browse session. Click **Browse** again to add another file.

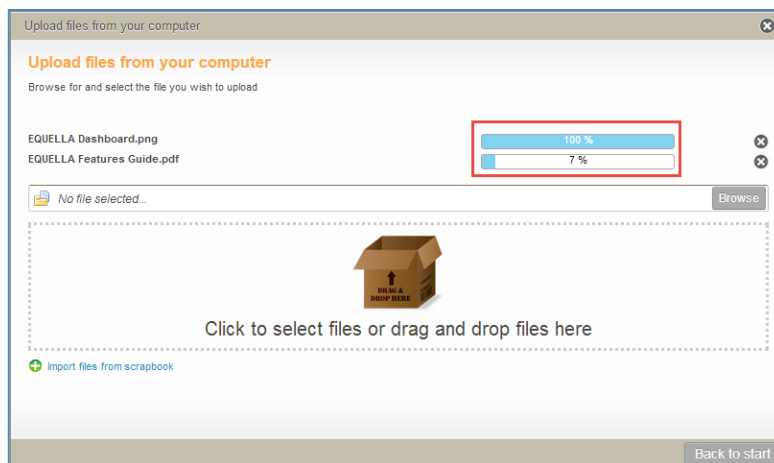
or

- Select one or more files then drag them into the dotted area to upload (in this example, *EQUELLA Features Guide.pdf* and *EQUELLA Dashboard.png*). There is no limit to the number of files that can be dropped into the area. An example is shown in Figure 22.



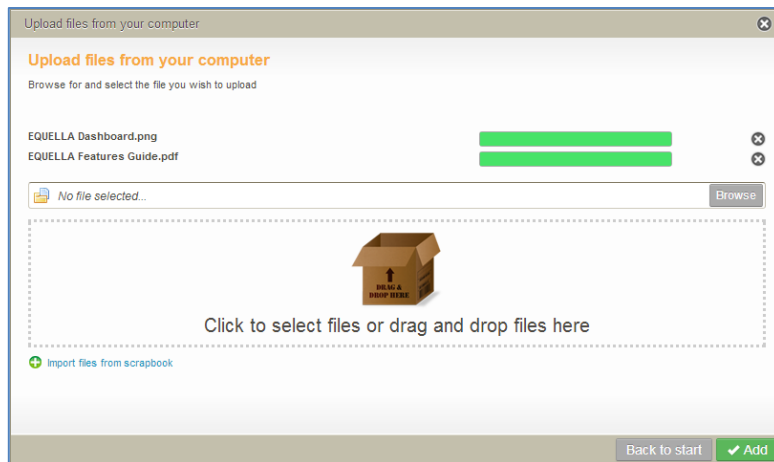
**Figure 22 Two files selected and dragged into drop area**

The files are uploaded and a progress bar displays for each. An example is shown in Figure 23.



**Figure 23 Progress bars display for each file being uploaded**

Once the upload is complete the progress bar displays green. And example is shown in Figure 24.




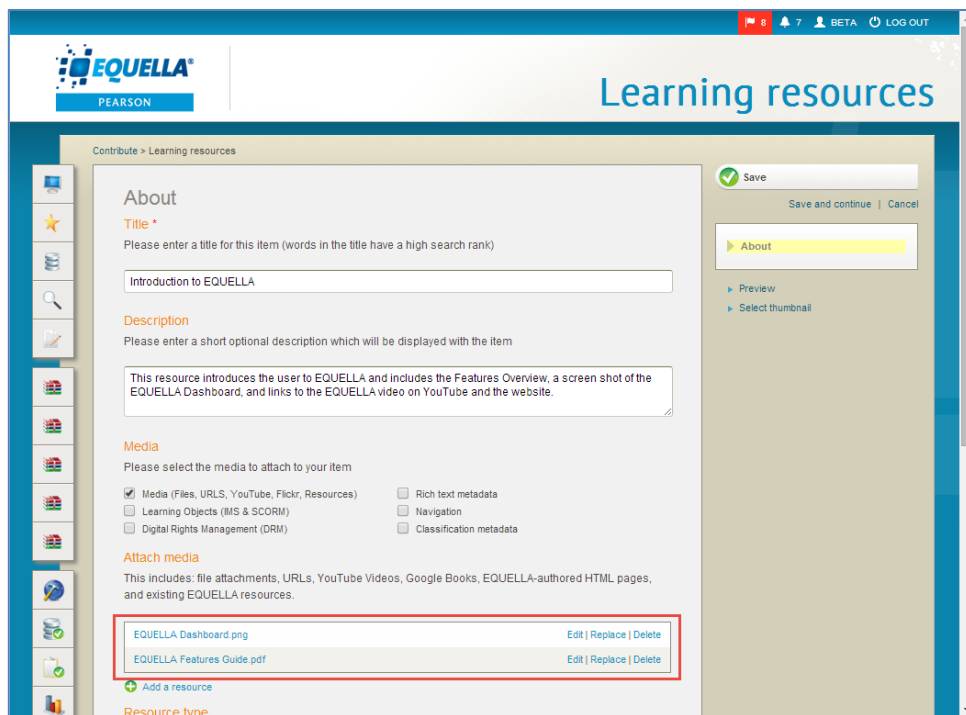
**Figure 24 Completed uploads**

A file can be removed by clicking .

Select the **Import files from scrapbook** link to add scrapbook files to the resource. See *EQUELLA My Resources User Guide* for more information.

Click  to return to the **Pick resource type** page without saving the file selected.

- Once all required files have been selected, click . The files are now listed on the Learning resources wizard page, as shown in Figure 25.

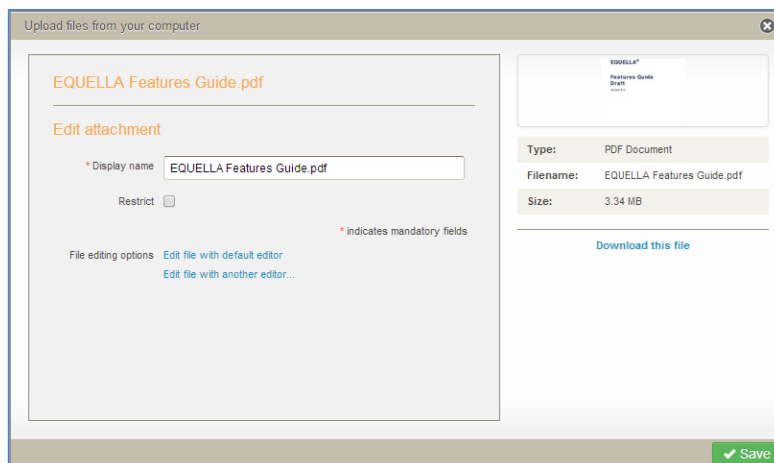


**Figure 25 Learning resources wizard page with files listed**

File options are:

- **Edit**—opens a page displaying file metadata and file editing options:
  - The **Display name** can be changed.
  - Select **Restrict** to allow the attachment to display to only users with the *VIEW\_RESTRICTED\_ATTACHMENTS* permission. Note that only users with the *RESTRICT\_ATTACHEMENT* permission will have access to the **Restrict** checkbox.
  - **Edit file with default editor**—opens the default editor for that file type (e.g. *Word*).
  - **Edit file with another editor**—lists all editors available for that file type (e.g. *Word*, *Wordpad* etc.).
  - **Download this file**—downloads the file to the local drive.

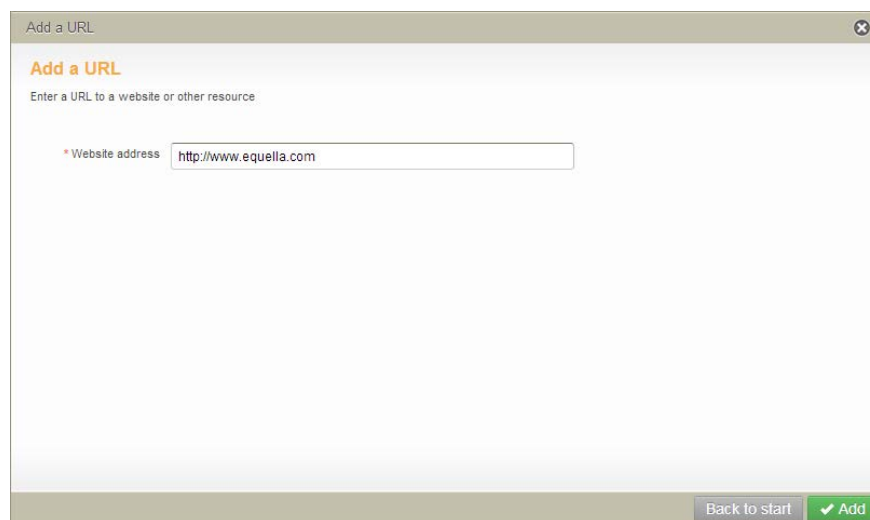
An example of the Edit attachment page is shown in Figure 26.



**Figure 26 Edit attachment page**

Once a file is edited and saved using an editor (e.g. *Word*), the [Upload changes](#) and [Ignore changes](#) buttons display. Select [Upload changes](#) to implement the changes in the attachment.

- **Replace**—opens the Pick resource type page (shown in Figure 19). Another file can be selected, and the option to Replace the current file or Add the new one is offered.
  - **Delete**—removes file after confirmation.
8. Select the **Add a resource** link again, then select **URL** then click [Next](#). The **Add a URL** page displays. An example is shown in Figure 27.






**Figure 27 Add a URL dialog**


9. Enter the URL (e.g. <http://www.equella.com>) and click [Add](#). The **Edit URL details** page displays as shown in Figure 28.

**Figure 28 Edit URL details page**

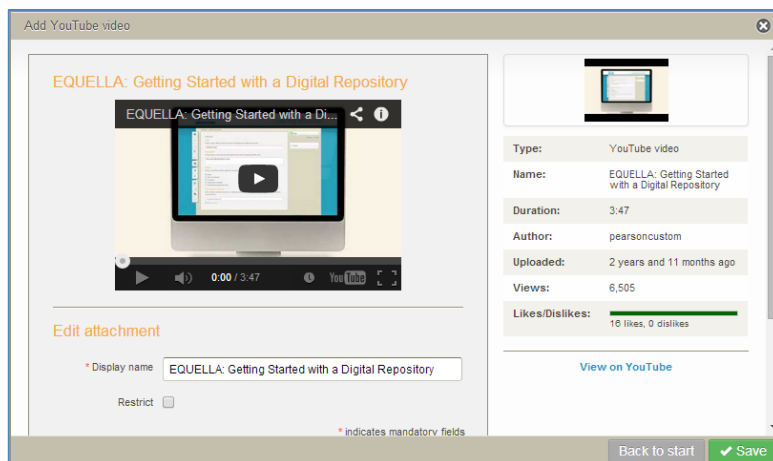
The **Display name** can be changed to something more meaningful than the actual web address if required (e.g. *EQUELLA website*), but the **Website address** must be prefixed with `http://`, not just `www`, or it won't work.

10. Click  to return to the Learning resources wizard page. The EQUELLA website link now displays in the list.
11. Select the **Add a resource** link again, and this time select **YouTube** then click . The **Add YouTube** page displays. Enter an appropriate search term (e.g. *equella*) in the **Search** text box then click . Matching search results from YouTube display, as shown in Figure 29.

**Figure 29 Add YouTube page**


12. Select the required YouTube video (e.g. *EQUELLA: Getting Started with a Digital Repository*) then click . The **Edit YouTube details** page displays, as shown in Figure 30.





**Figure 30 Edit YouTube details page**

The **Display name** can be changed if required.

13. Click  to return to the Learning resources wizard page. The *EQUELLA: Getting Started with a Digital Repository* link now displays in the list.

14. Select a type of resource in the **Resource Type** field (e.g. *General Knowledge*).

As this general information is relevant to all classes, in this example, we're not going to select a particular class. All information has now been entered. An example of the page is shown in Figure 31.

The screenshot shows the EQUELLA Learning resources wizard interface. The top navigation bar includes the EQUELLA logo, the word 'PEARSON', and the title 'Learning resources'. The breadcrumb trail indicates 'Contribute > Learning resources'. The main content area is titled 'About' and contains the following sections:

- Title \***: A text input field containing 'Introduction to EQUELLA'.
- Description**: A text area containing 'This resource introduces the user to EQUELLA and includes the Features Overview, a screen shot of the EQUELLA Dashboard, and links to the EQUELLA video on YouTube and the website.'
- Media**: A section for selecting media to attach. It includes checkboxes for 'Media (Files, URLs, YouTube, Flickr, Resources)', 'Learning Objects (IMS & SCORM)', 'Digital Rights Management (DRM)', 'Rich text metadata', 'Navigation', and 'Classification metadata'. The 'Media' checkbox is checked.
- Attach media**: A section for attaching media. It includes a list of uploaded files: 'EQUELLA Dashboard.png', 'EQUELLA Features Guide.pdf', 'EQUELLA website', and 'EQUELLA: Getting Started with a Digital Repository'. Each file has 'Edit | Replace | Delete' links.
- Resource type**: A section for selecting the type of resource. It includes checkboxes for 'General knowledge', 'Required Reading', 'Exam Preparation', and 'Assignment Related'. The 'General knowledge' checkbox is checked.
- Class**: A section for selecting the classes for which this resource will be relevant. It includes a 'Select a group' link.

On the right side of the wizard, there are buttons for 'Save', 'Save and continue', 'Cancel', 'About', 'Preview', and 'Select thumbnail'.

**Figure 31 Learning resources wizard with information entered**

If multiple images have been uploaded, click the **Select thumbnail** link to choose which image thumbnail to use on the Search results views. The default thumbnail used is always the first image file thumbnail in the list (in this example, *EQUELLA Dashboard.png*) See [Select thumbnail link](#) on page 12 for further information.

Select the **Save and continue** link to save the data you have entered so far.

Select the **Preview** link to see the resource as it will look when saved.

Select the **Cancel** link to cancel the contribution.

15. Click . The Save dialog displays, as shown in Figure 32.

The screenshot shows a 'Save' dialog box with the following content:

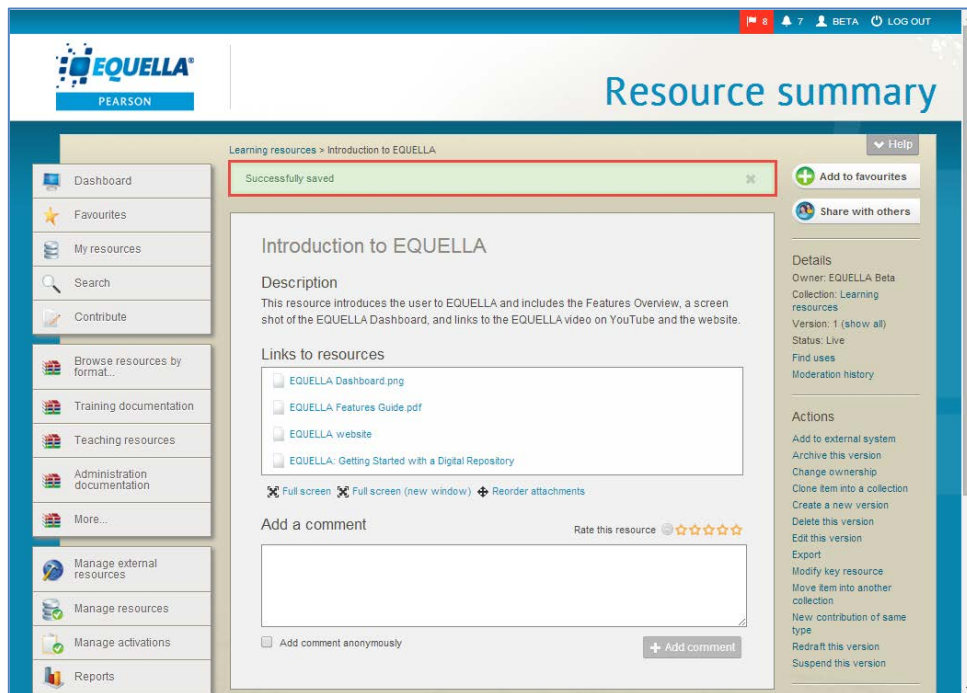
- A question: 'Do you want to submit this item for moderation now, or save as a draft?'.
- A text input field for 'Optional message for moderators:'.
- Three buttons at the bottom: 'Submit for moderation' (with a green checkmark icon), 'Save draft', and 'Cancel'.

**Figure 32 Save dialog**

Select **Save draft** to save as a draft copy to be submitted at a later date. The draft copy can be accessed from the My resources, Drafts. (See *EQUELLA My Resources Guide* for more information.)

Select **Cancel** to go back to the Learning resources wizard page.

Select **Submit for moderation** to save the resource and submit it to the associated workflow. The Resource summary page displays with a confirmation receipt at the top, as shown in Figure 33.

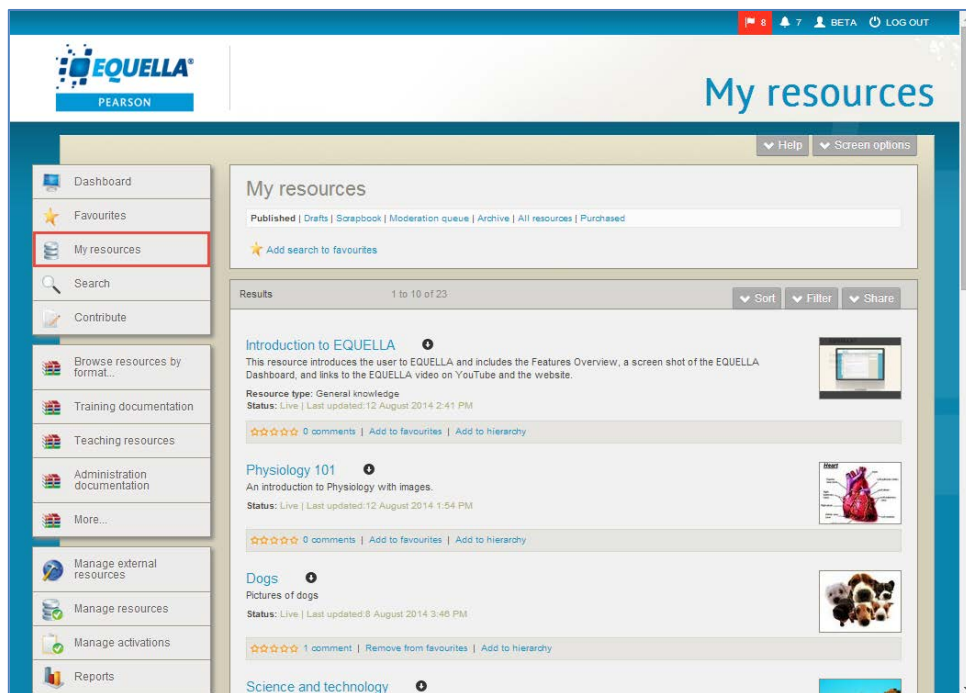


**Figure 33 Resource summary page**

Now that the resource has been contributed to the selected collection, the contributor can access the resource to track its progress, view information or perform a number of actions.

## ***Accessing contributed resources***

Contributed resources can be accessed through the **My resources** link on the navigation menu. The **My resources** page displays, as shown in Figure 34.



**Figure 34 My resources page**

All resources contributed by the logged in user can be found in **My resources**. Select an option to view resources of a specific status (e.g. *Drafts*, *Moderation queue*, *Published*, *Scrapbook*, *Archive*) or select **All resources**. See *EQUELLA My Resources User Guide* for more information.

To view the **Resource summary** page for a selected resource, click on the title link. The **Resource summary** page opens for the selected resource.

An example is shown in Figure 35.



Figure 35 Resource summary page

## Resource summary page

The resource summary page is used to view, comment on and rate resources. Resource owners and content managers can also manage resources and resource versions.

### Main panel

The main panel of the summary displays resource content, viewing options, ratings and comments, while further information and various actions can be accessed using the **Details** and **Actions** area links.

The main panel can include the following:

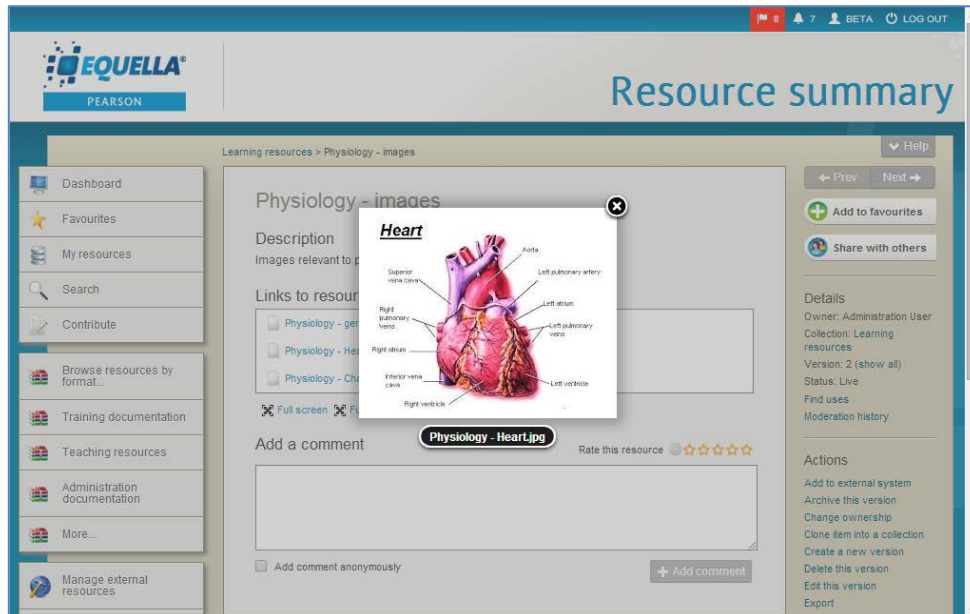
- **Title** – the name of the resource.
- **Description** – information about the resource.
- **Links to resources section** – lists the resource attachments. See [View attachments](#) on page 29 for further information.
- **Full screen/Full screen (new window) links** – opens all of the attachments in a full screen mode package viewer.
- **Reorder attachments** – opens a mode where the user can change the order the attachments appear in the list. See [Reorder attachments](#) on page 95.
- **Comments and ratings section** – see [Comments](#) on page 31.

### View attachments

The **Links to resources** section displays links to attachments, thumbnail images and viewers configured to view the resources.

## To display an attachment

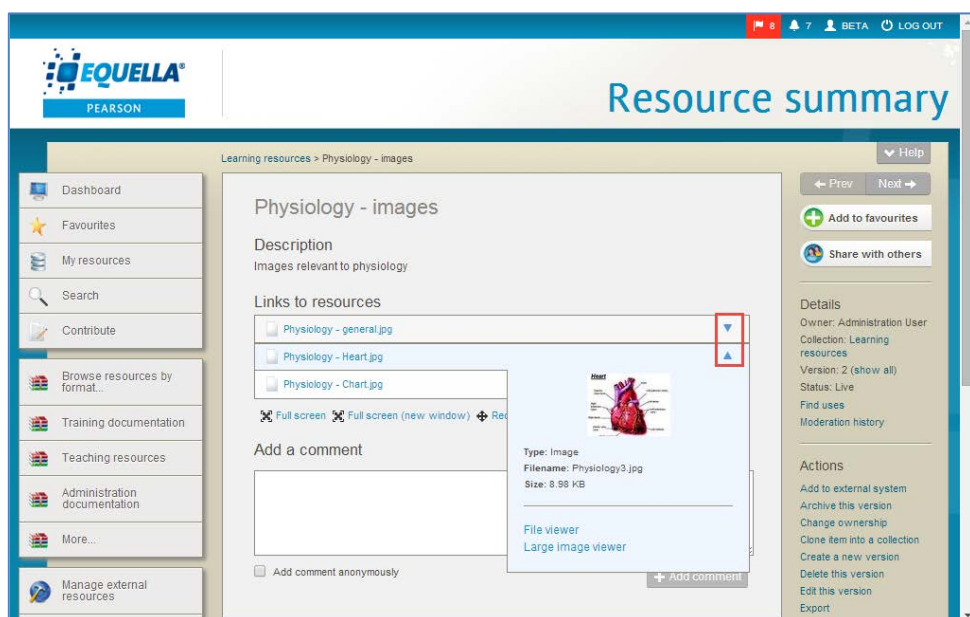
1. Select an attachment link to display the attachment in the default viewer. An example is shown in Figure 36.



**Figure 36 Attachment displayed in default viewer**

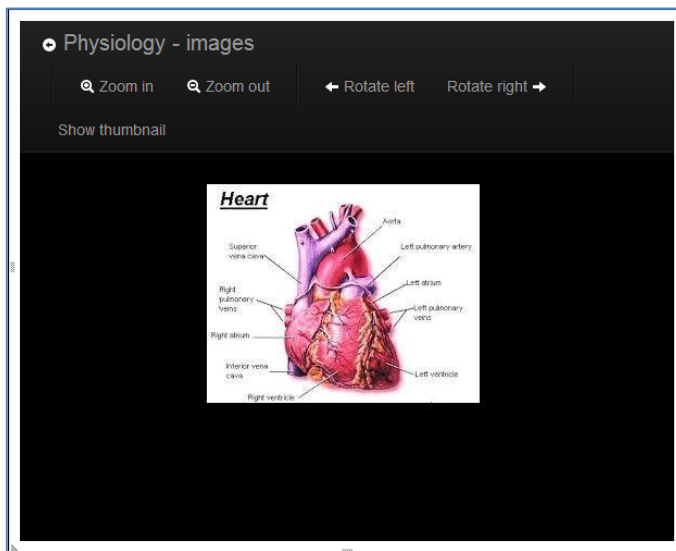
## To display attachment details and viewer options

1. Select the down arrow to the right of the attachment, or click in the space between, to display an expandable pane. This pane contains an image preview, name, type and size of attachment, and viewer options. An example is shown in Figure 37.



**Figure 37 Viewer options**

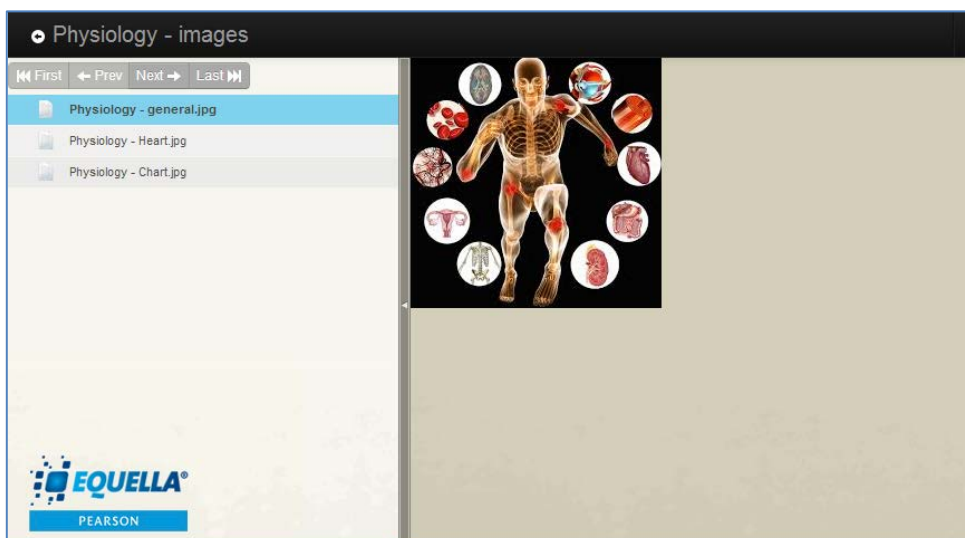
2. Select a configured viewer (e.g. **Large image viewer**) to display the attachment. An example is shown in Figure 38.



**Figure 38 Attachment displayed in large image viewer**

### To display all attachments

1. Select the **Full screen** link at the bottom of the attachments list to display all attachments in the default viewer. An example is shown in Figure 39.



**Figure 39 File viewer with packaged content**

Click the resource title or use the browser **Back** button to return to the Resource summary page.

## Comments

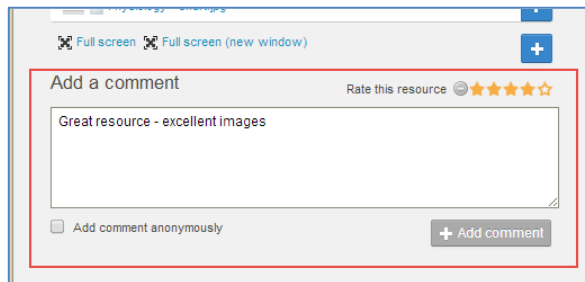
The **<x> comments** section on the resource summary page displays previously added comments and ratings. Select the **Delete comment** link to remove the comment.



The **Add a comment** section allows users with the appropriate privileges to enter comments and rate the resource. Clicking the **+ Add comment** button adds the comments and rating to the <x> comments list.

### To add a comment


1. Enter text in the **Add a comment** text box.
2. Select an optional star rating (1-5). An example is shown in Figure 40.

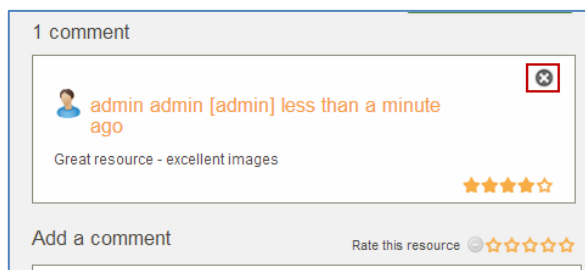


**Figure 40 Add a comment section**

3. Click **+ Add comment**.

### To delete a comment

1. Select the  icon that appears in the comment box alongside the comment, as shown in Figure 41.



**Figure 41 Delete comment**

2. Click **OK** in the confirmation dialog.

## Right-hand panel

The right-hand pane provides options for managing and viewing information about the resource.

- **Help**—click on the down arrow to display context-sensitive help and links to other help pages.
- **Prev** **Next**—use these buttons to move between the **Resource summary** pages of the current results.
- **Add to favourites**—click **Add search to favourites** to add the resource to the favourites list.
- **Share with others**—click **Share with others** to share an item link with other users, or to notify users when the resource becomes available (Live) if it is currently in moderation. An example of the **Share with others** page is shown in Figure 42.



The screenshot shows the 'Share with others' interface. At the top, it says 'Share with others' and 'Notify users when item becomes available'. Below this, it states 'The users below will be notified when this item becomes available.' There is a 'Users' dropdown menu currently showing 'No users selected' and a link to 'Select more users to notify'. The next section is 'Share item link via email', with the instruction 'Email a colleague with a link allowing them to view this item.' It contains two mandatory fields: '\* Email' and '\* Message'. Below these is a dropdown for 'Allow access for' set to '1 Day'. A 'Send Email' button is at the bottom right, along with a note '\* indicates mandatory fields'.

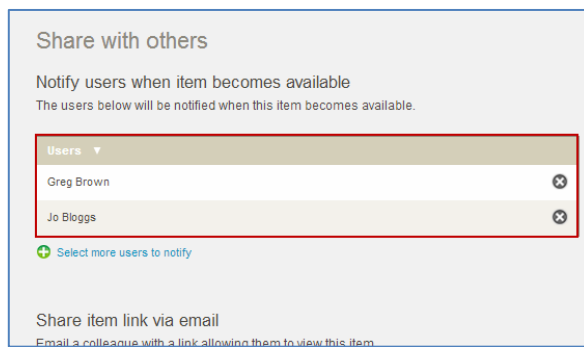
**Figure 42 Share with others page**

Select the **Select more users to notify** link to open the **Select user(s)** search page. Search for and select the required users, then click **Select these users**. An example is shown in Figure 43.

The screenshot shows the 'Select user(s)' search page. It has a title bar 'Select user(s)' and a sub-header 'Select user(s)'. Below the sub-header, it says 'The search query can contain a name (first, last or login) or a partial name with a wildcard character (name\*)'. There is a search input field with the letter 'o' and a 'Search' button. Below the search bar is a list of users with checkboxes: 'Jo Bloggs' (checked), 'equellademo equellademo' (unchecked), 'administrator administrator' (unchecked), and 'Greg Brown' (checked). At the bottom right, there is a green button labeled 'Select these users'.

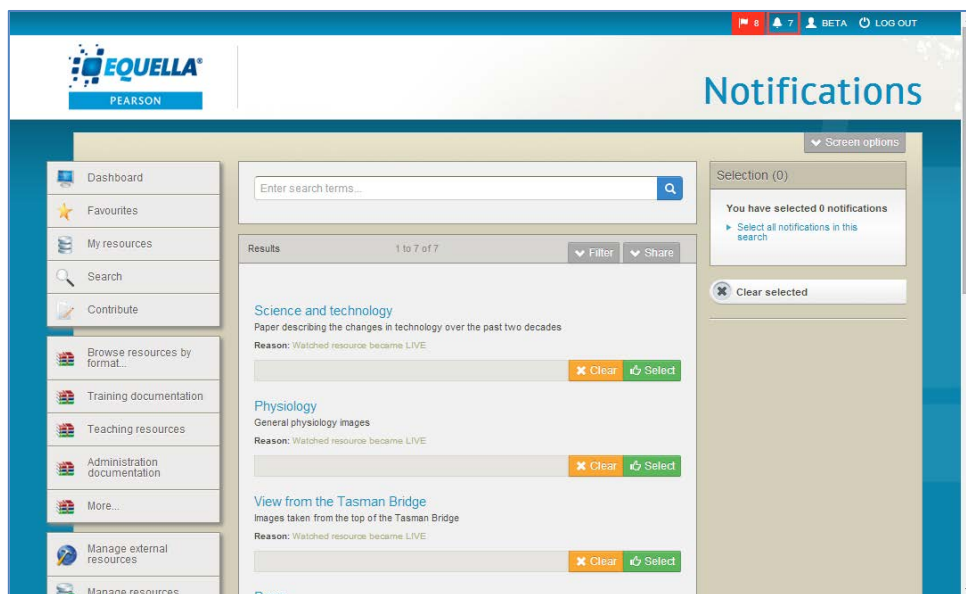
**Figure 43 Select users page**

The selected users are added to the notification list, as shown in Figure 44.



**Figure 44 Notification list**

Once the resource becomes 'Live', the resource is listed in the selected user's Notifications link. An example is shown in Figure 45.



**Figure 45 Notifications link**

Users can also send a link to the resource via email. Enter an email address in the field provided and a message. Select the access duration from the **Allow access for** drop-down. This is designed for users outside your institution.

## Details

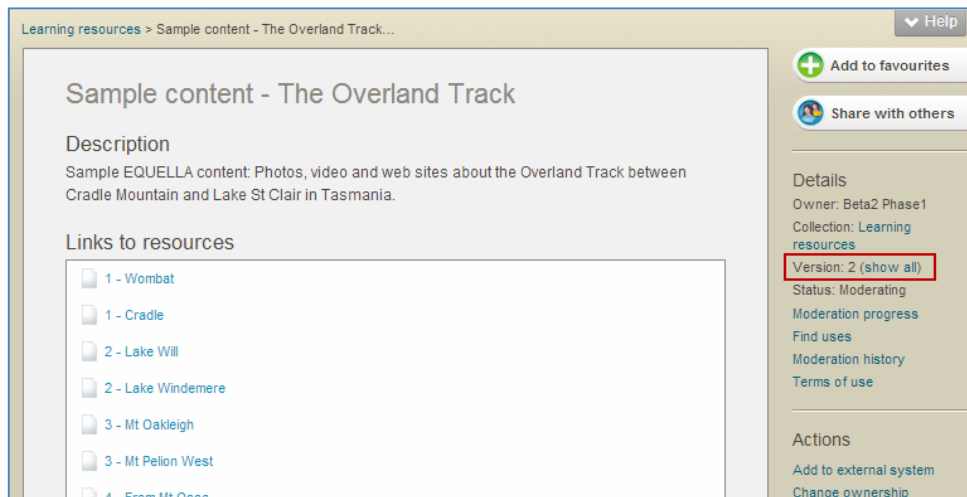
The **Details** area displays information about the resource and can include: **Owner**, **Collaborators**, **Collection**, **Version** number, and **Status**.

- **Owner**—The user that created the resource.
- **Collaborators**—lists any users that have been added as collaborators for this resource. See [Change ownership](#) on page 44 for more information.
- **Collection**—the collection to which the resource belongs. Selecting the collection link displays a search result list for that collection.

- **Version**—displays the version number of the current resource. Clicking on the **(show all)** link displays a list of all versions, including the current live version. See [To view all versions of a resource](#) on page 35
- **Status**—resource statuses can be Live, Archived, Deleted, Suspended, Review, Moderating, Rejected or Draft.
- **Find uses**—use this link to display a list of current uses for this resource. This link displays only if at least one connector is configured in the EQUELLA system. See [Find uses function](#) on page 37.
- **Moderation History**—select this link to display the **Moderation history** page. Refer to the [Moderation history page](#) section on page 40 for more information.
- **Terms of use**—select this link to display the **Terms of use** page with terms and a list of users who have accepted those terms and date of acceptance. Refer to the [Terms of use page](#) section on page 38.
- **Moderation Progress**—select this link to display the **Moderation progress** page. Refer to the [Moderation progress page](#) section on page 39 for more information.
- **Activations**—select this link to display the **Activations** page with a list of all activations for the selected resource. This link only appears if there are activations set for this resource. See [Activations page](#) on page 41.

### To view all versions of a resource

1. Select the **(show all)** link to display the **Versions of this item** page listing all resource versions and their statuses. An example is shown in Figure 46.



**Figure 46 Resource summary page - show all link**

The **Versions of this item** page displays. An example is shown in Figure 47.

Version	Title	Status
2	Sample content - The Overland Track	moderating
1	Sample content - The Overland Track	live

**Figure 47 Versions of this item page**

When a new resource has been created using the **Create a new version** action, the previous version is archived. The example in Figure 47 shows a resource with two versions, the original version appears as *1* in the **Version** column and its status displayed as *archived*. The current version is version *2*, with a status of *live*. All resources displayed in the versions list can be viewed, regardless of their status.

2. Select the *Title* of the version to display the resource summary page of the selected version.

## Find uses function

The **Find uses** function is part of the EQUELLA **Push to LMS** feature.

Select **Find uses** from the Details section to display all current uses for the selected resource within a specific connector (LMS). *NOTE: The **Find uses** link only displays if at least one external connector has been configured in the EQUELLA system.* See the *EQUELLA Push to LMS Guide* for more detail.

EQUELLA supports Moodle and Blackboard connectors (and Local Resources for the Find Uses function), and more than one may be configured. If there are multiple connectors configured, a drop down box displays, and the user selects from the list. If there is only one connector configured, the **Add to external system** screen displays immediately. *NOTE: If the connector **Local Resources** is configured and selected, the system displays all uses of the current resource and attachments within other resources in the EQUELLA repository.*

If there is only one connector configured, the **Find uses** screen is displayed immediately. An example is shown in Figure 48.

**Find uses**

Searching

Blackboard ▼

Where this resource is used

Enter text to filter table rows 🔍

Course	Location	Date added ▼
EQUELLA 5 Documentation Course	Week 3	2 months ago
EQUELLA 5 Documentation Course	Information	2 months ago
Australian Politics 101	Content	2 months ago
Anthropology 101	Content	2 months ago
Australian History 101	Information	2 months ago
Anatomy 101	Information	2 months ago
Anthropology 101	Information	2 months ago
Astrophysics 101	Content	2 months ago
Australian Politics 101	Information	2 months ago
Australian History 101	Content	2 months ago
Astrophysics 101	Information	2 months ago
NEW COURSE	Information	2 months ago
Australian Politics 101	Content	2 months ago
Australian Politics 101	Content	2 months ago

☐ Show all versions of this resource

☐ Show unavailable courses and resources

**Figure 48 Find uses page**

The Courses in which the selected resource is currently used are listed, with the **Location** and **Date added** information.

Enter course search criteria in the filter box to return only matching results.

To sort by *Course*, *Location* or *Date added*, click the column heading. Click again to reverse the order displayed.

Tick **Show all versions of this resource** to display any uses of earlier versions of the resource.

Tick **Show unavailable courses and resources** to display any hidden courses and resources in which the selected resource is used.

Select the down arrow (which displays to the right of the **Date added column** when the cursor points at a course line) to display an expandable pane showing resource details, including **Resource version**, **Date modified**, and **Name in external system**. An example is shown in Figure 49.

**Find uses**

Searching  
Blackboard ▼

Where this resource is used  
Enter text to filter table rows

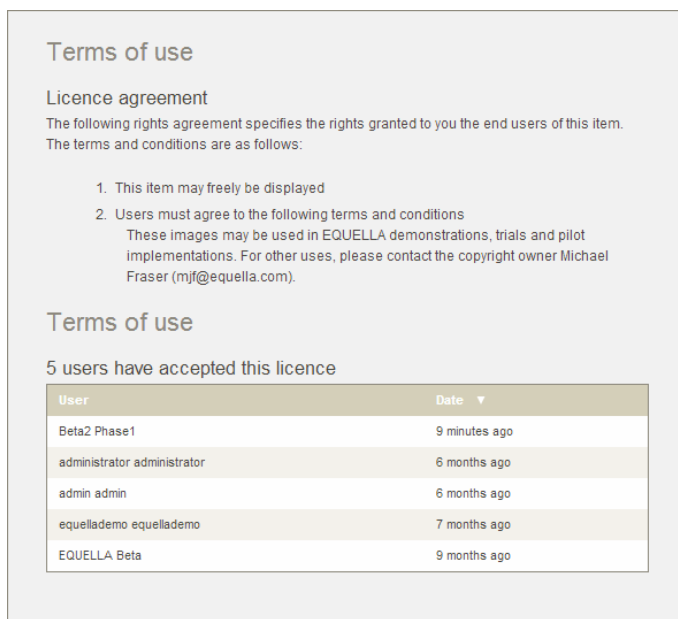
Course	Location	Date added ▼
EQUELLA 5 Documentation Course	Week 3	2 months ago
EQUELLA 5 Documentation Course		Resource version 1 Date modified: 2 months ago Name in external system: Tasmania - The Overland Adventure
Australian Politics 101		
Anthropology 101		
Australian History 101	Information	2 months ago
Anatomy 101	Information	2 months ago
Anthropology 101	Information	2 months ago
Astrophysics 101	Content	2 months ago
Australian Politics 101	Information	2 months ago
Australian History 101	Content	2 months ago
Astrophysics 101	Information	2 months ago
NEW COURSE	Information	2 months ago
Australian Politics 101	Content	2 months ago
Australian Politics 101	Content	2 months ago

☐ Show all versions of this resource  
☐ Show unavailable courses and resources

**Figure 49 Find uses resource details**

## Terms of use page

Selecting the **Terms of use** link displays the **Terms of use** page which lists the terms of use that users must accept before they can view the resource. Additionally, a list of users that have accepted those terms of use is displayed. An example is shown in Figure 50.

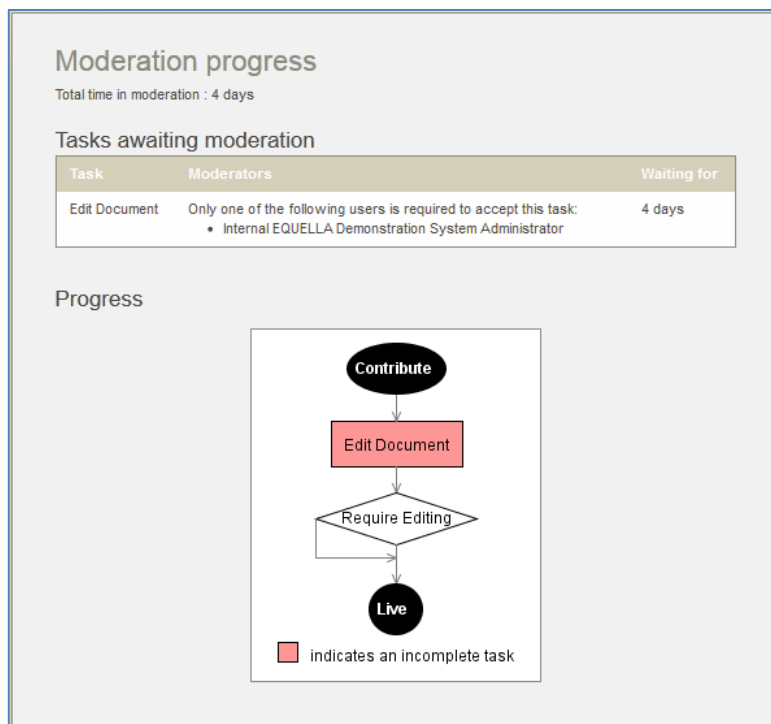


**Figure 50 Terms of use page**

## Moderation progress page

Contributed resources that are in the process of moderation will have a link to the **Moderation progress page** in the Details section of the Resource summary page. An example of the Moderation progress page is shown in Figure 51. This page provides information about where the resource currently sits in the moderation process and has the following elements:

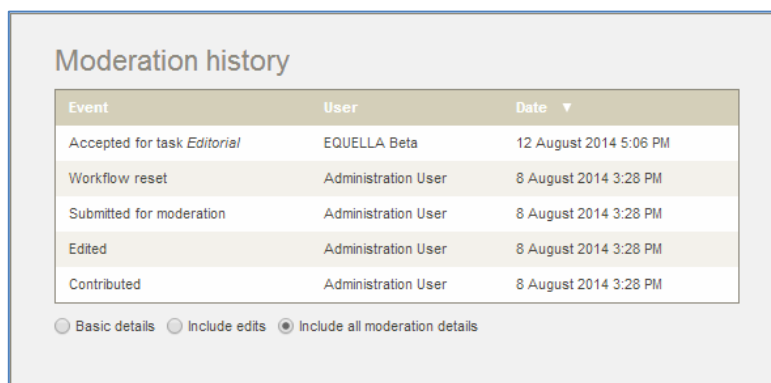
- **Task**—lists the name of the current moderation task,
- **Moderators**—lists the names of the users required to accept the task
- **Waiting for**—total time waiting for moderation since entering that task
- **Progress**—a graphical flow chart illustrating the layout of the moderation process. The current task, and any accepted tasks are highlighted.



**Figure 51 Moderation progress page**

## Moderation history page

A resource's Moderation history page provides details on any submission, status change and moderation events pertaining to this resource. An example of the Moderation history page is shown in Figure 52.



**Figure 52 Moderation History page**

It is made up of the following elements:

- **Event** (Submitted for moderation, Went live, etc)—provides a descriptive name of the event.
- **User**—lists the user involved in this event.
- **Date**—can show either the time since the event occurred or the exact date and time the event occurred, depending on the date format configuration.
- **Display options**



- **Basic details** – displays only major events.
- **Include edits radio button**—displays Edit events as well as basic details.
- **Include all moderation details**—displays all events in the history, including Edit and Workflow reset events.

## Activations page

(NOTE: The Activations page is only relevant to Australian users).

A resource will have an Activations page when it has been activated against a course. This action is restricted to resources contributed to collections with Copyright Agency Limited (CAL) configured. Once activated, users can view the resource's Activations page, similar to that in Figure 53.

This page is made up of the following elements:

- **Attachment**—the name of the resource that is activated against the course.
- **Status**—the activation status of the resource.
- **Information**
  - **Students**—number of students enrolled in the course the resource has been activated against.
  - **User**—name and username of the user that activated this resource.
  - **Course**—name and description of the course the resource has been activated against.
  - **From**—the date and time the resource was made active from.
  - **Until**—the date and time the resource was made active until.

Attachment	Status	Information	
Mathematics as a science	Active	Students: 0 User: EQUELLA Beta [beta] Course: EQUELLA 101 From: 12 August 2014 7:15:40 AM Until: 30 August 2014 2:00:00 PM	<a href="#">Edit</a>   <a href="#">Delete</a>
Mathematics as a science	Inactive	Students: 0 User: EQUELLA Beta [beta] Course: EQUELLA 101 From: 30 May 2014 3:43:58 AM Until: 30 June 2014 12:00:00 AM	<a href="#">Delete</a>
Mathematics as a science	Inactive	Students: 0 User: EQUELLA Beta [beta] Course: EQUELLA 101 From: 26 May 2014 12:00:00 AM Until: 30 June 2014 12:00:00 AM	<a href="#">Delete</a>
Mathematics as a science	Inactive	Students: 0 User: Unknown user Course: EQUELLA 101 From: 21 February 2014 12:19:06 AM Until: 28 February 2014 12:00:00 AM	<a href="#">Delete</a>

**Figure 53 Activations page**

Activations can be removed by selecting the **Delete** link.

Activations can be edited by selecting the **Edit** link. See the *EQUELLA Copyright (CAL) User Guide* for further information.

## Actions

The Actions area can display the following operations:

### Add to external system

The **Add to external system** function is part of the EQUELLA **Push to LMS** feature.

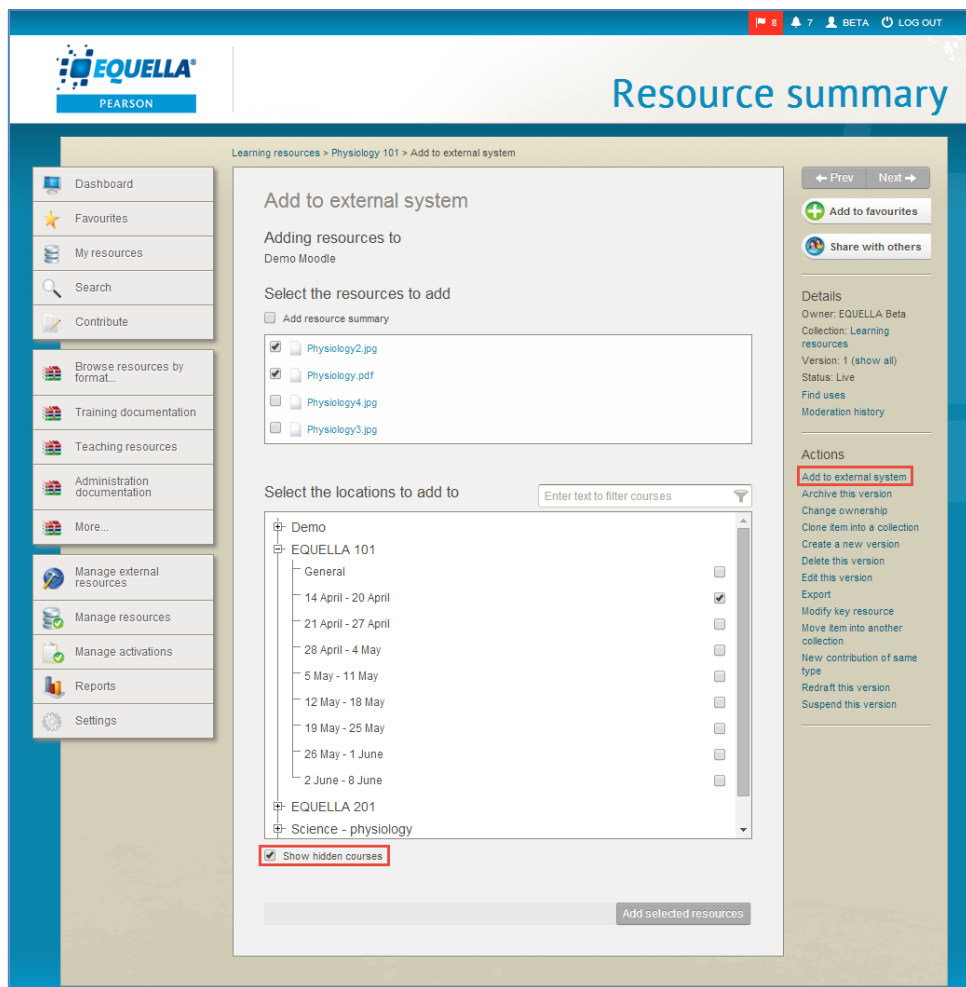
Selecting this action allows the user to add all or parts of the resource to external connectors that have been configured in the system. (*Note: The **Add to external system** link only displays if at least one external connector has been configured in the EQUELLA system.*) See the *EQUELLA Push to LMS Guide* for more information.

EQUELLA supports Moodle and Blackboard connectors, and more than one may be configured. If there are multiple connectors configured, a drop down box displays, and the user selects from the list. If there is only one connector configured, the **Add to external system** screen displays immediately.


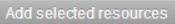
The **Add to external system** function allows the addition of a resource to multiple locations within the selected connector.

#### To add a resource to an external system

1. Select **Add to external system** from Actions.
2. Select the external system from the drop down list to which the resource is to be added. If only one external system is set up, the **Add to external system** screen displays immediately. An example is shown in Figure 54.



**Figure 54 Add to external system**

3. Select the required resources from the **Select the resources to add** section.
4. Click the **Show unavailable courses** checkbox to display any courses set as 'unavailable' in Blackboard, the **Show hidden courses** to display any courses set as 'hidden' in Moodle, use  to expand courses to show their components and/or enter text in the filter text box to show only matching courses, if required. (This filter box only displays if there are more than 10 results in the *Select the locations to add to* pane.)
5. Select the location/s to which the resource should be added, then click .
6. An action receipt confirming the successful addition of the resource is displayed at the top of the page. An example is shown in Figure 55.
7. Use the breadcrumbs to navigate back to your resource, as shown in Figure 55.

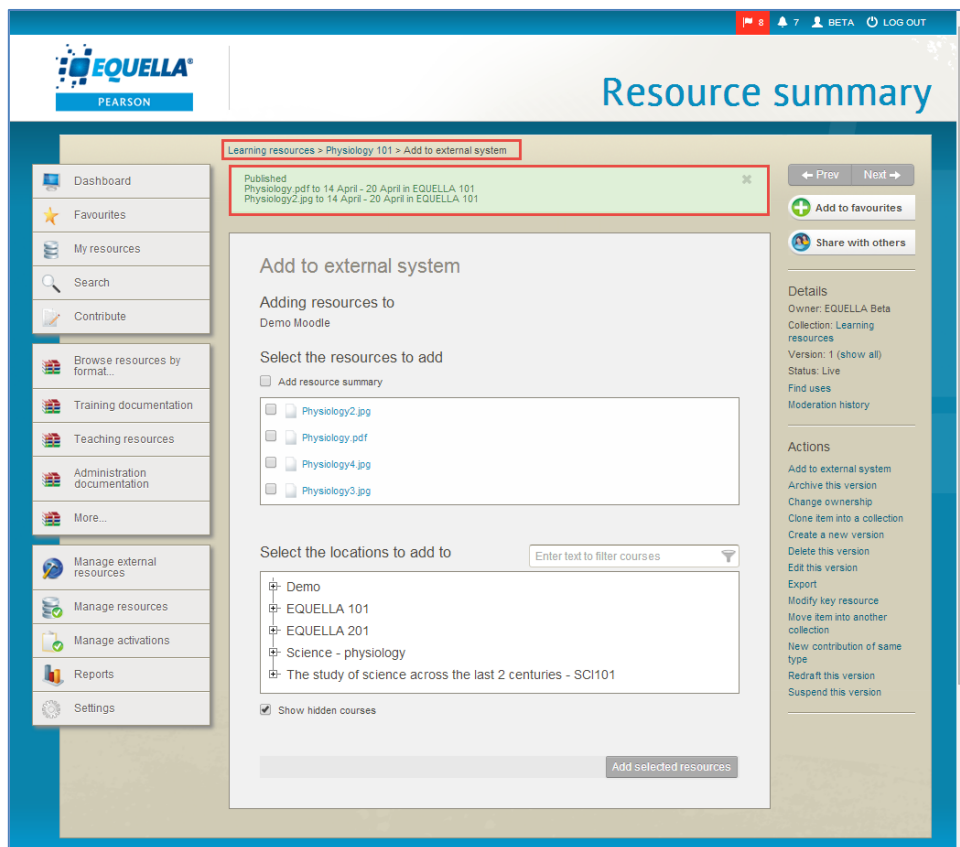


Figure 55 Successful addition of resource to Moodle location

## Archive this version

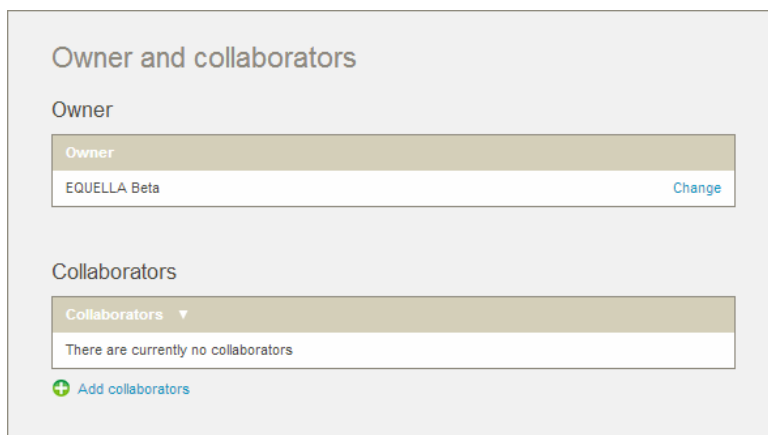
Displays for resources with a status of 'Live'. Archiving hides the resource from searches, and is intended for resources that are no longer required. This includes old versions of resources that have been archived by the **Create a new version** action. The resource cannot be discovered but remains accessible via its URL.

## Change ownership

Ownership can be reassigned and other users can be added as collaborators.

### To reassign ownership

1. Select the **Change ownership** link to display the **Owner and collaborators** page. An example is shown in Figure 56.



Owner and collaborators

Owner

Owner

EQUELLA Beta [Change](#)


Collaborators

Collaborators ▾

There are currently no collaborators

[+ Add collaborators](#)

**Figure 56 Owner and collaborators page**

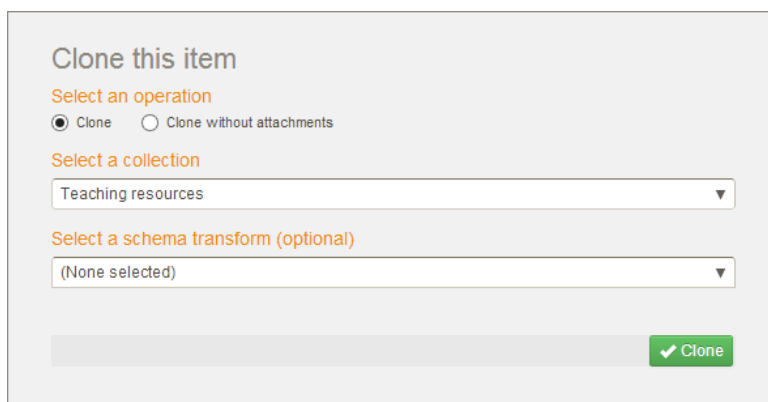
2. Select the **Change** link to display the **Select a new owner** dialog where a new owner can be selected.
3. Click the **Add collaborators** link to display the **Select collaborators** dialog. Collaborators are listed with  icon alongside.

## Clone item into a collection

Selecting this action makes a copy of the selected resource, with or without attachments, and adds it to the same or a different collection. The original version remains live, unlike the **New Version** operation where the original version is archived once the new version becomes live.

### To clone a resource

1. Select the **Clone item into a collection** link to display the **Clone this item** page. An example is shown in Figure 57.



Clone this item

Select an operation

☒ Clone ☐ Clone without attachments

Select a collection

Teaching resources ▾

Select a schema transform (optional)

(None selected) ▾

[✓ Clone](#)

**Figure 57 Clone this item page**


2. Select an option from the **Select an operation** section. There are two options:
  - **Clone**—copy the entire resource, including all attachments and metadata; or
  - **Clone without attachments**—copy metadata without attachments.

The cloned resource can be assigned to the same collection as the original resource, or to a different collection. The original collection is displayed as the default in the **Select a collection** section.

### To assign the cloned resource to a different collection

1. Click the **Select a collection** arrow to display a drop-down list of available collections.
2. Select a collection.

### To apply an optional schema transform to the cloned resource

1. Click the **Select a schema transform (optional)** arrow to display the options.
2. Select an option, or leave at the default (**None selected**).
3. Click . The contribution wizard for the resource is displayed.
4. Modify the item metadata or attachments, if required.
5. Publish, save, or cancel the resource, as required.

## Create a new version

Selecting this action displays the contribution wizard for the resource, allowing the user to modify metadata or files, and the new version can be published or submitted for moderation. When the new version reaches the 'live' status, the current version is automatically archived.

## Delete this version

This action removes the resource from the repository and marks it for purging with the next purge scheduled task.

## Edit this version

Selecting this action displays the contribution wizard for the resource, allowing the user to modify metadata or files. Any changes made are saved to the current version.

## Export

Export a resource to one of the formats listed. Resources can be exported as an IMS package or a METS record with or without attachments.

## Mark this for review

Selecting this link (which only shows for resources with a status of 'live' that are in a collection with an associated workflow) changes the status of the resource to 'review' and places it at the beginning of the associated workflow.

## Modify key resource

Resources can be added or deleted as key resources to one or more hierarchy topics.

## To add or delete a resource to/from a hierarchy topic

1. Click the **Modify key resource** link from the Actions menu. The **Modify key resource** page displays, as shown in Figure 58.

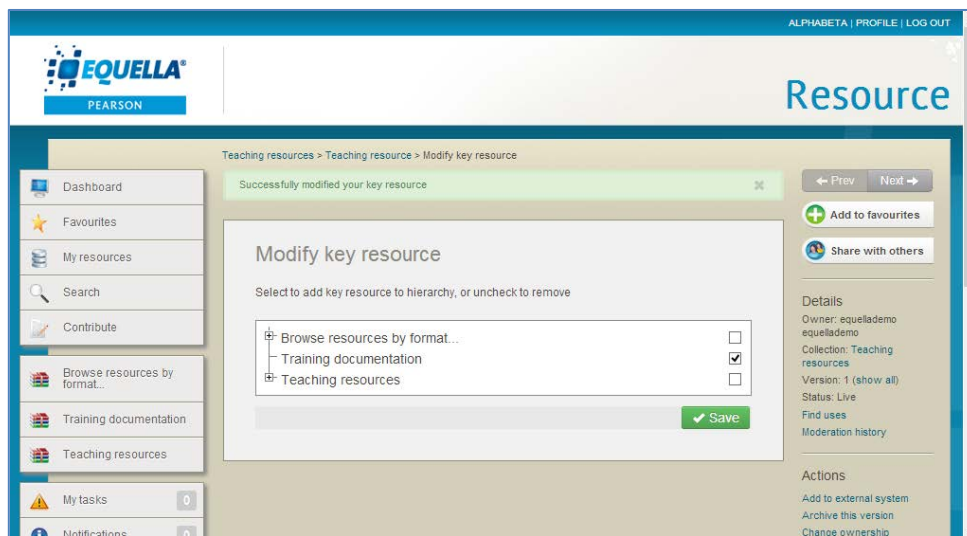
**Figure 58 Modify key resource page**

2. Click on the plus sign to expand the hierarchy tree and display any subtopics.
3. Select the checkboxes next to the hierarchy topics or subtopics (including dynamic subtopics) to which the resource is to be added as a key resource. Multiple checkboxes can be selected. An example is shown in Figure 59.

*NOTE: Hierarchy topics or subtopics where the selected resource already exists as a key resource display as checked when the **Modify key resource** page opens. Uncheck to remove the resource as a key resource.*

**Figure 59 Hierarchy topic and subtopic selection**

4. Click . A confirmation screen displays, as shown in Figure 60.



**Figure 60 Confirmation of Key resource modification**

The resources have now been added (or removed) as key resources for the selected hierarchy topics and/or subtopics.

See the *EQUELLA Hierarchy Configuration Guide* for further information.

## Move item into another collection

Selecting this action allows the selected resource to be transferred to a different collection.

### To move a resource

1. Select the **Move item into another collection** link to display the **Move this item** page. An example is shown in Figure 61.

**Figure 61 Move this item page**

2. Click the **Select a collection** arrow to display a drop-down list of available collections.
3. Select a collection.

### To apply a preferred schema transform to the moved item

1. Click the **Select a schema transform (optional)** arrow to display the options.
2. Select an option, or leave at the default (**None selected**).
3. Click **Move**. The contribution wizard for the resource is displayed.



4. Modify the metadata or attachments, if required.
5. Publish, save, or cancel the resource, as required.

## New contribution of same type

Selecting this action displays the original contribution wizard where a new resource can be contributed to the same collection.

## Redraft this version

This action is intended for resources that require redrafting prior to moderation workflow completion. Selecting this operation allows the resource to be edited and re-submitted for moderation or saved as a draft. Redraft is intended for use with resources that have not been made *live*.

## Suspend this version

Displays for resources of all statuses. This action hides the resource from searches and is intended for temporary removal of resources from the repository, for example the removal of links for sites that are temporarily unavailable. The resource cannot be discovered but remains accessible via its URL. A **Resume this version** action is available for suspended resources.

# Wizard controls reference

## DRM

The **DRM** (Digital Rights Management) control is used to gather information on the digital rights associated with contributed items. A DRM control can display two pages in a contribution wizard: a **Details** page (name **DRM – Ownership and rights** in the example) and an **Access Control** page. Examples are shown in Figure 62 and Figure 63.

The screenshot shows the 'DRM - Ownership and rights' page within the Equella 'Learning resources' wizard. The page has a sidebar on the left with icons for various actions. The main content area contains two sections: 'Who are the rights holders?' with radio buttons for 'Myself', 'Myself and others listed below', and 'Others listed below'; and 'What rights should the end user be provided?' with radio buttons for 'Allow users to only take and use', 'Allow users to take, use and modify if required', and 'Specify custom usage and reuse permissions (Advanced users only)'. At the bottom, there are 'About \*' and 'DRM - Access control' buttons. On the right, there is a 'Save' button with a green checkmark, and a 'Save and continue | Cancel' link. Below that is a list of steps: 'About \*', 'DRM - Ownership and rights' (highlighted), and 'DRM - Access control'. At the bottom right, there are 'Preview' and 'Select thumbnail' links.

Figure 62 DRM details page

The screenshot shows the 'DRM - Access control' page within the Equella 'Learning resources' wizard. The page has a sidebar on the left with icons for various actions. The main content area contains three sections: 'Only allow a limited number of licence acceptances' with a 'Specify number of acceptances: \*' field set to '100'; 'Limit use to a specific date range' with a 'Range \*' section containing 'From' and 'to' date pickers; and 'Require that users agree to the following terms of use' with a 'Use statement \*' text area. At the bottom, there is a 'DRM - Ownership and rights' button. On the right, there is a 'Save' button with a green checkmark, and a 'Save and continue | Cancel' link. Below that is a list of steps: 'About \*', 'DRM - Ownership and rights', and 'DRM - Access control' (highlighted). At the bottom right, there are 'Preview' and 'Select thumbnail' links.

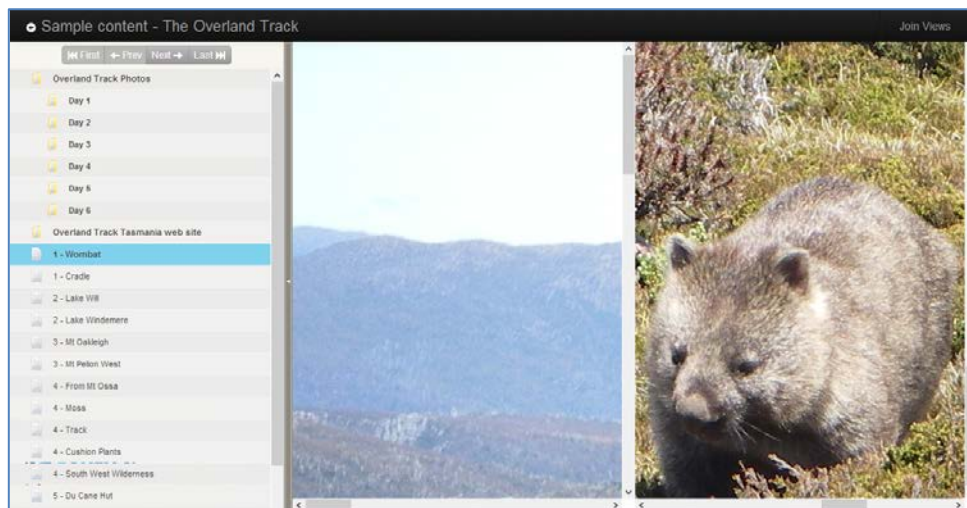
Figure 63 DRM access control page

## Navigation builder

The **Navigation builder** control adds a page to the contribution wizard that allows users to:

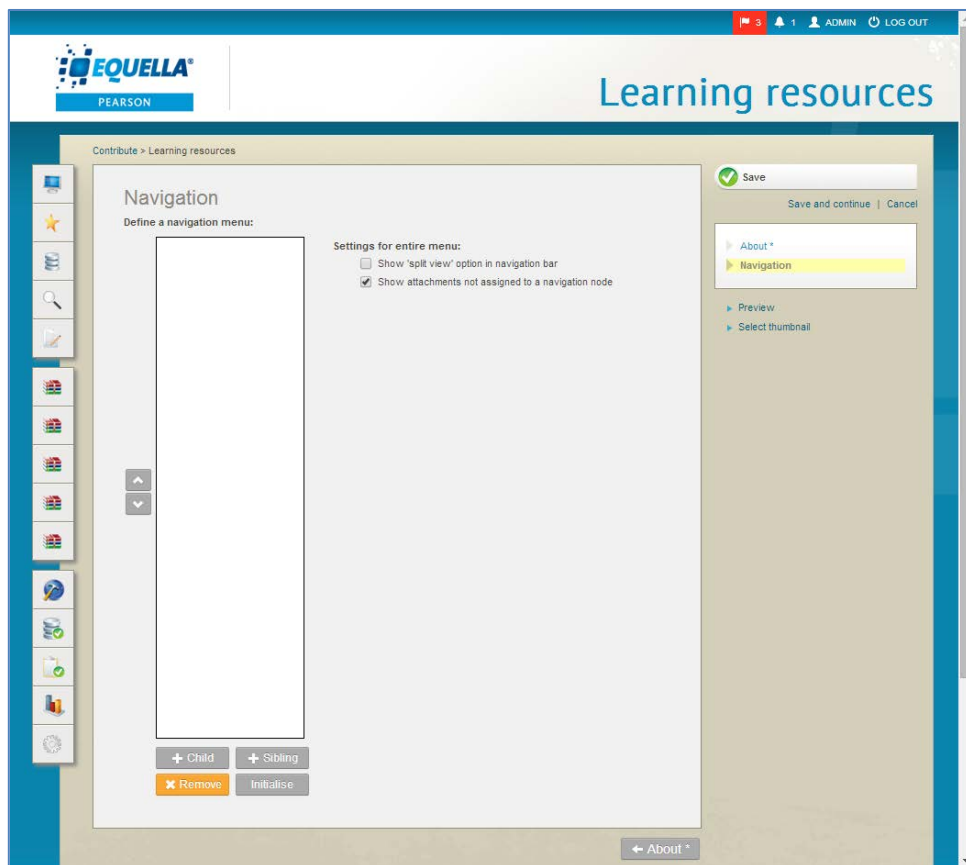
- organise resource attachments and links into a package with customised navigation;
- provide content viewers with a 'split view' option where attachments can be viewed in two independent panes;
- rename files; and
- specify the viewer type for individual attachments.

The packaged content can be arranged with a single attachment per menu node or organised with multiple tabs to group related attachments together. For example, a menu node can include images grouped with text, HTML, PDF or video attachments containing information such as transcripts and translations. An example user's view of multiple images grouped per node and displayed with a 'split view' is shown in Figure 64.



**Figure 64 User's view of packaged content displayed as a split view**

An example of the Navigation builder page as part of a contribution wizard is shown in Figure 65.



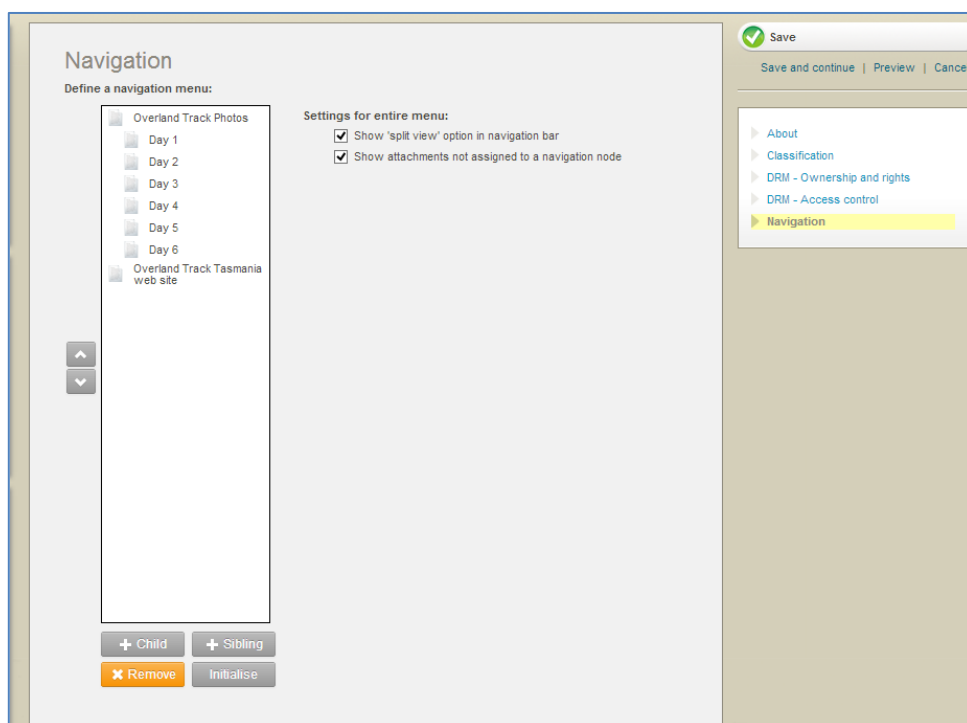
**Figure 65 Navigation builder control**

The Navigation builder configuration options include:

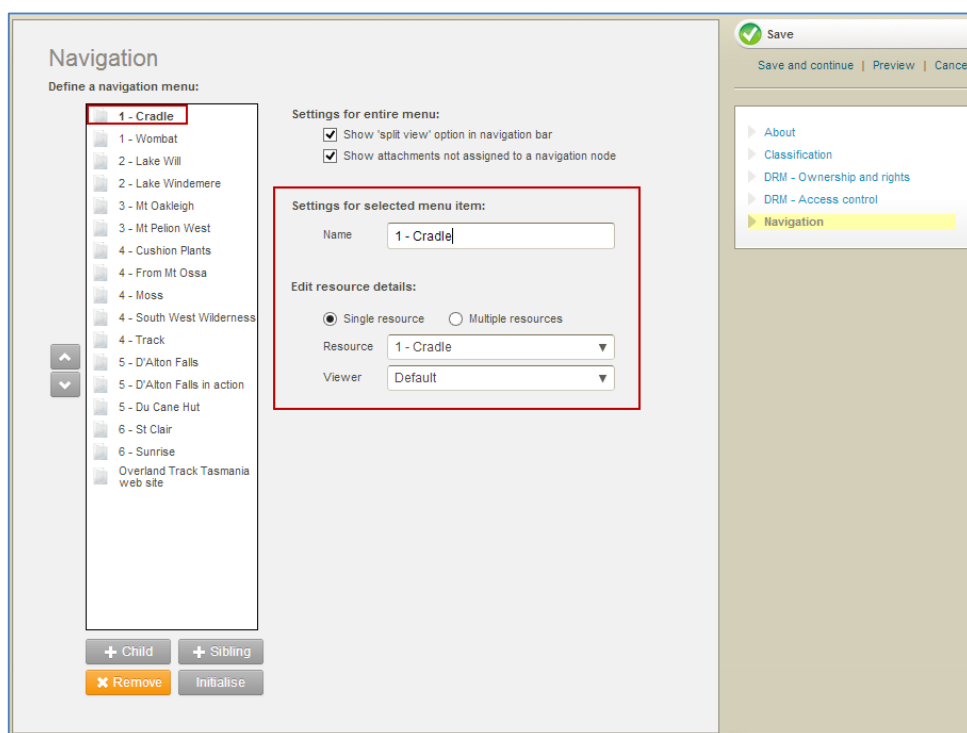
### Navigation menu pane

- **↑ and ↓**—use the up and down arrows to rearrange the sequence of nodes.
- **+ Child**—click this button to add a menu node at the level below the currently selected node.
- **+ Sibling**—click this button to add a menu node at the same level as the currently selected node.
- **x Remove**—click this button to remove the selected node.
- **Initialise**—click this button to automatically populate the menu pane with names of the resource's attachments and links. An example is shown in Figure 66.

Navigation nodes can be created one at time (an example of this method is shown in Figure 66), or the **Initialise** button can be selected to bring in all the resource's attachments and links, which can then be restructured (an example is shown in Figure 67).



**Figure 66** Navigation control showing an example navigation menu



**Figure 67** Navigation builder control showing initialised navigation menu nodes

Select a menu node (e.g. *1-Cradle*) to display the configuration options, as shown in Figure 67.

## Settings for entire menu section

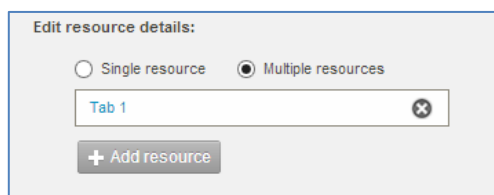
- **Show 'split view' option in menu bar**—check this option to allow users to view different tabs side by side, an example is shown in Figure 64.
- **Show attachments not assigned to a navigation node**—check this check box if any attachments linked to the resource that aren't assigned to a node are required to display as part of the package.

## Settings for selected menu item section

- **Name**—enter or edit the selected node name as required.

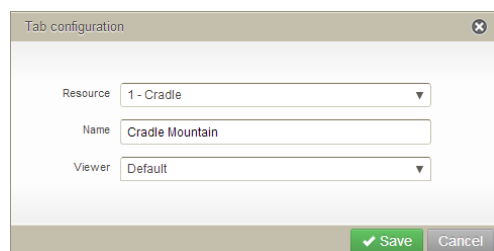
## Edit resource details section

- **Single resource**—select this option to link only one attachment per menu node:
  - Select an attachment from the **Resource** drop-down list.
  - Select the type of viewer used to display the attachment from the **Viewer** drop-down list.
- **Multiple resources**—select this option to link more than one attachment per node. The attachments are displayed as tabs within the viewers. An example of the **Edit resource details** section with the **Multiple resources** option selected is shown in Figure 68.



**Figure 68 Edit resource details—Multiple resources option selected**

Click the attachment name (e.g. *Tab 1*) to display the attachment dialog. An example is shown in Figure 69.



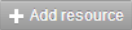
**Figure 69 Attachment dialog**


The following options are provided:

- **Resource**—select an attachment from the drop-down list (e.g. *1-Cradle*).
- **Name**—edit the tab name (e.g. *Cradle Mountain*).
- **Viewer**—select a viewer to display the attachment. Viewer options may include the following, depending upon the system MIME types configuration:

- **Default**—a preselected viewer for the file type, for example, an image file viewer, PDF reader etc.
- **File Viewer**—the native application for the attached file type. For example, image files are displayed using the basic image viewer, *.pdf* files in a PDF reader, *.doc* and *.docx* files in MS Word™ etc.
- **Large Image Viewer**—a sophisticated image viewer that is preferred for images that are larger than the standard browser window. An example is shown in Figure 71.
- **HTML Conversion**—converts and displays the file as HTML.
- **Embedded Movie Player**—displays the video file in a flash video viewer.
- **Download File**—automatically downloads the file.

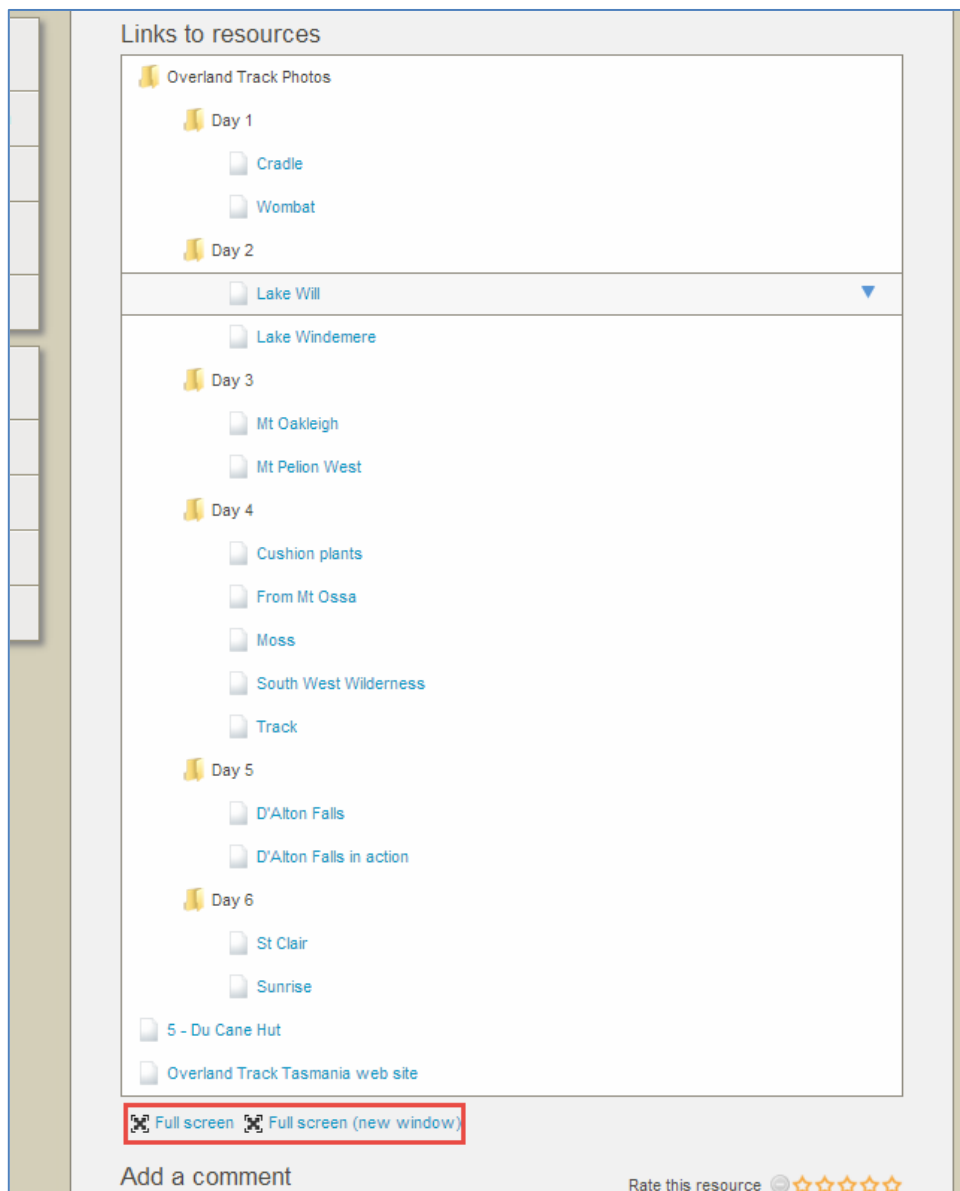
Click the **Save** button to save changes.

Added attachments are displayed by tab name in the **Edit resource details** list. An example is shown in Figure 68. To add further attachments, click  to display the attachment dialog.

Click  to remove an attachment from the list.

## *View content package*

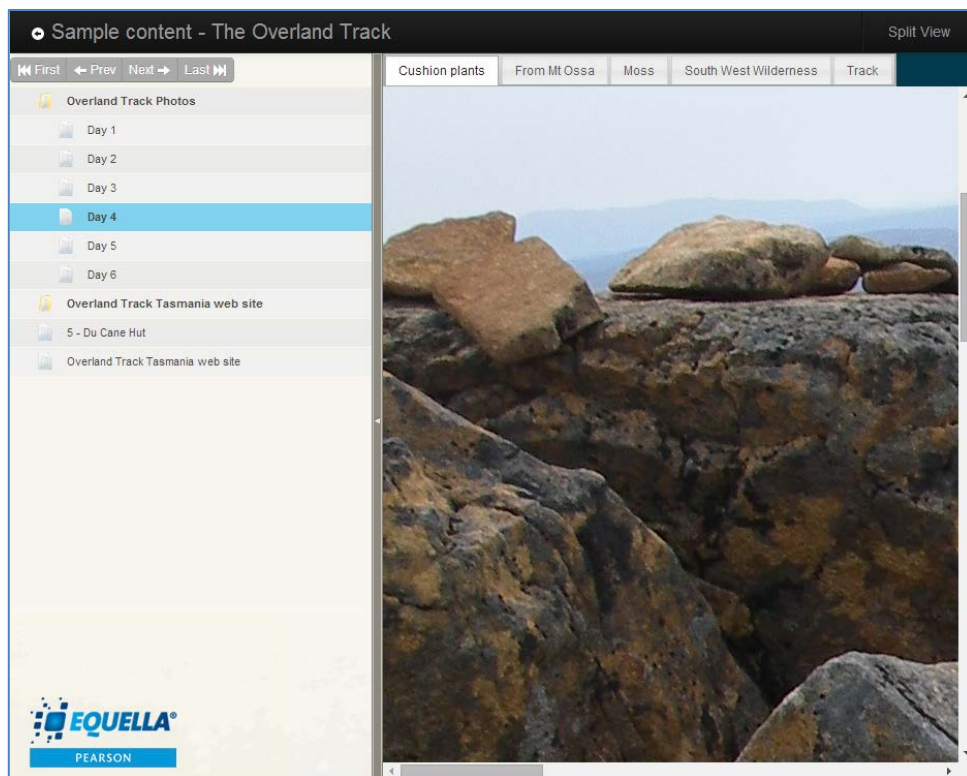
To view the resource package, click the **Full screen** or **Full screen (new window)** link under the Links to resources panel. An example is shown in Figure 70.



**Figure 70 Resource Summary—Full screen link**

The packaged content displays. An example displaying in the *Large Image Viewer* is shown in Figure 71.





**Figure 71 Package content—viewed with the Large Image Viewer**

The Large Image Viewer is used when an image is too large or detailed to be viewed in a single screen. Additional controls available in this viewer allow the user to zoom and rotate the image, or to show a thumbnail of the image.

## Attachments

Depending on the configuration settings of the attachment control, addition of attachments may include the following types:

- Files (e.g. doc, docx, pdf, xls, zip, ppt etc.)
- EQUELLA Resources—attachments and links associated with existing EQUELLA resources
- URL Links
- Web pages
- Google Books
- Kaltura
- YouTube Videos
- iTunesU Tracks
- Flickr photos
- External tool provider (LTI)

An example of an attachment control is shown in Figure 72.

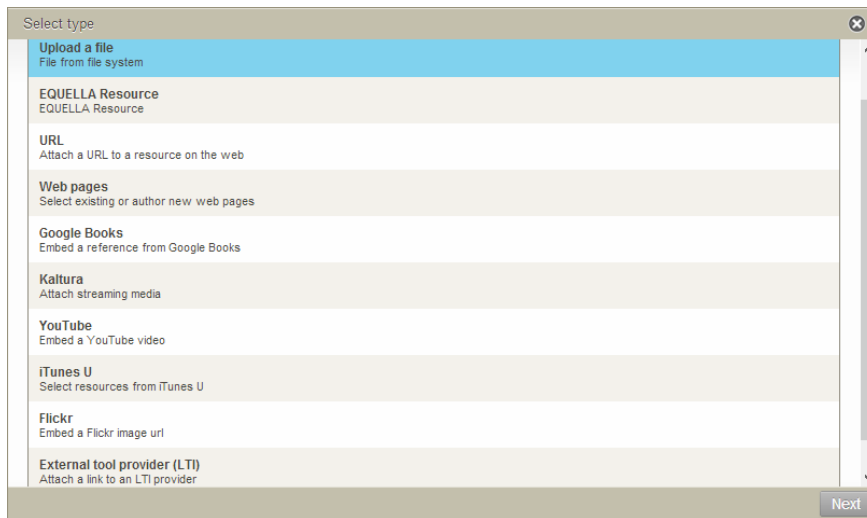


Figure 72 Attachment control

## Upload a file

To upload a file

1. Select **Upload a file** then click **Next**. The **Upload files from your computer** page displays, as shown in Figure 73.

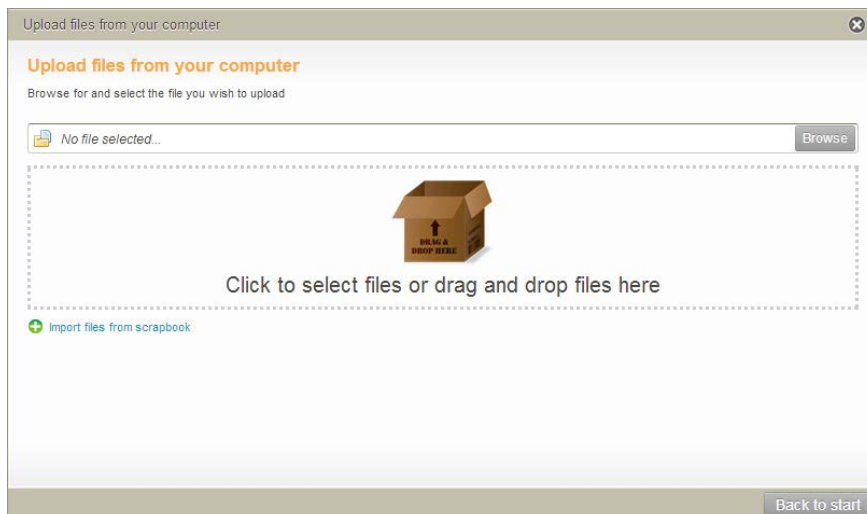
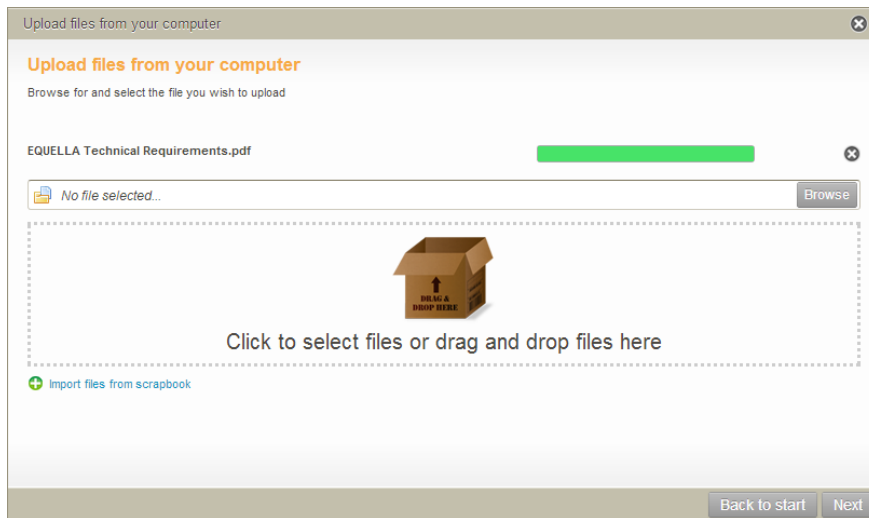


Figure 73 Upload files from your computer page

2. Use one of the following methods to select files:
  - Click **Browse** to open the **Choose File to Upload** page, navigate to the required file (in this example *EQUELLA Technical Requirements.pdf*) then click **Open**. The **Upload files from your computer** page displays with the selected file listed, as shown in Figure 74.

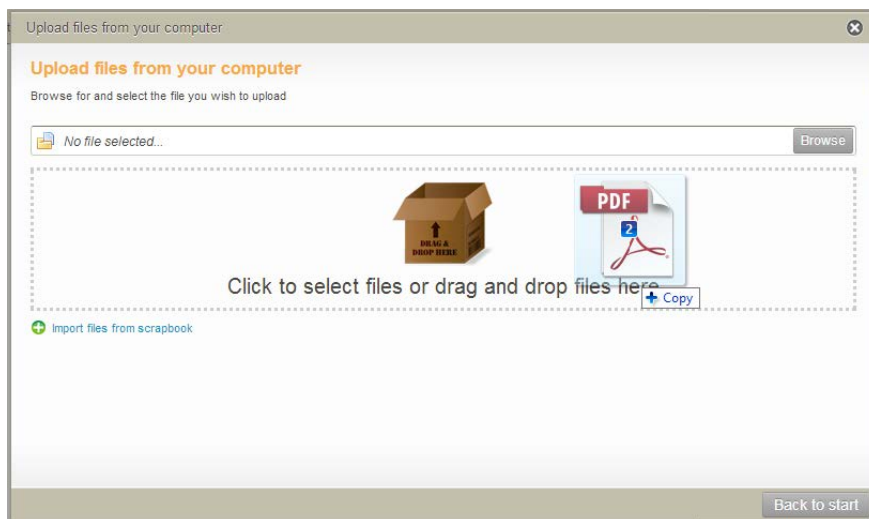


**Figure 74 File uploaded using Browse button**

*NOTE: This method allows only single files to be uploaded with each browse session. Click **Browse** again to add another file.*

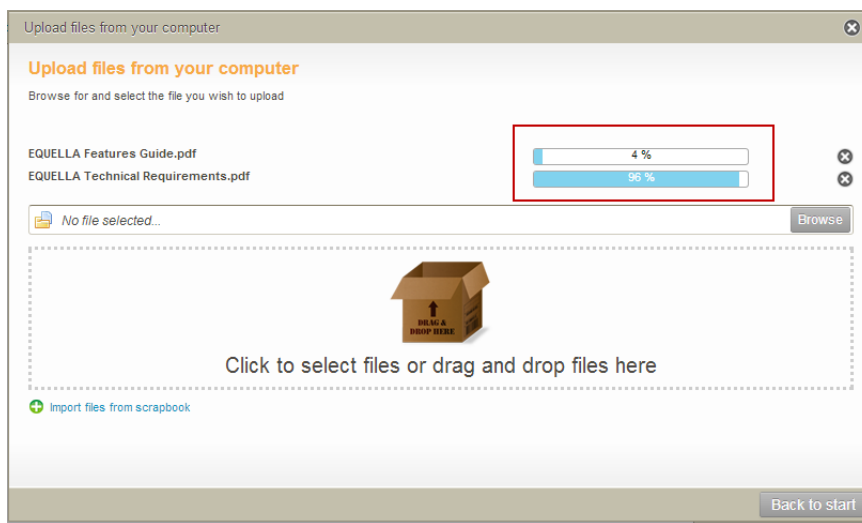
or

- Select one or more files then drag them into the dotted area to upload. There is no limit to the number of files that can be dropped into the area. An example is shown in Figure 75.



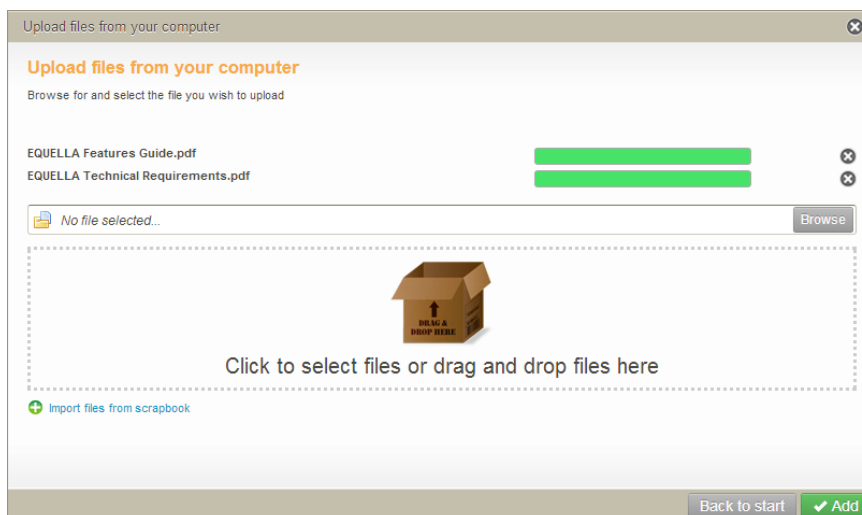
**Figure 75 Two pdfs selected and dragged into drop area**

The files are uploaded and a progress bar displays for each. An example is shown in Figure 76.



**Figure 76 Progress bars display for each file being uploaded**

Once the upload is complete the progress bar displays green. An example is shown in Figure 77.



**Figure 77 Completed uploads**

- The selected file can be removed by clicking
  - Select the **Import files from scrapbook** link to add scrapbook files to the resource. See *EQUELLA My Resources User Guide* for more information.
  - Click to return to the **Pick resource type** page without saving the file selected.
3. Once all required files have been selected, click . The files are now listed on the wizard page, as shown in Figure 78.

**Figure 78 Learning resources wizard page with files listed**

File options are:

- **Edit**—opens a page displaying file metadata and file editing options:
  - **Edit file with default editor**—opens the default editor for that file type (e.g. *Word*).
  - **Edit file with another editor**—lists all editors available for that file type (e.g. *Word*, *Wordpad* etc.).

An example of the Edit attachment page is shown in Figure 79.

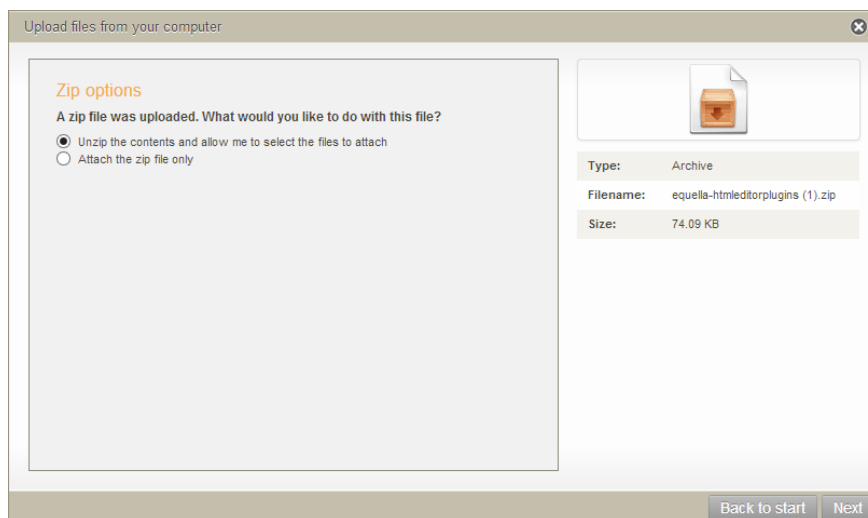
**Figure 79 Edit attachment page**

Once a file is edited and saved using an editor (e.g. *Word*), the **Upload changes** and **Ignore changes** buttons display. Select **Upload changes** to implement the changes in the attachment.

- **Replace**—opens the Pick resource type page (shown in Figure 72). Another file can be selected, and the option to Replace the current file or Add the new one is offered.
- **Delete**—removes file after confirmation.

## Upload zip files

When one or more zip files are uploaded to EQUELLA, depending on how the system is configured to treat zip files by default, a **Zip options** dialog may display. An example is shown in Figure 80.



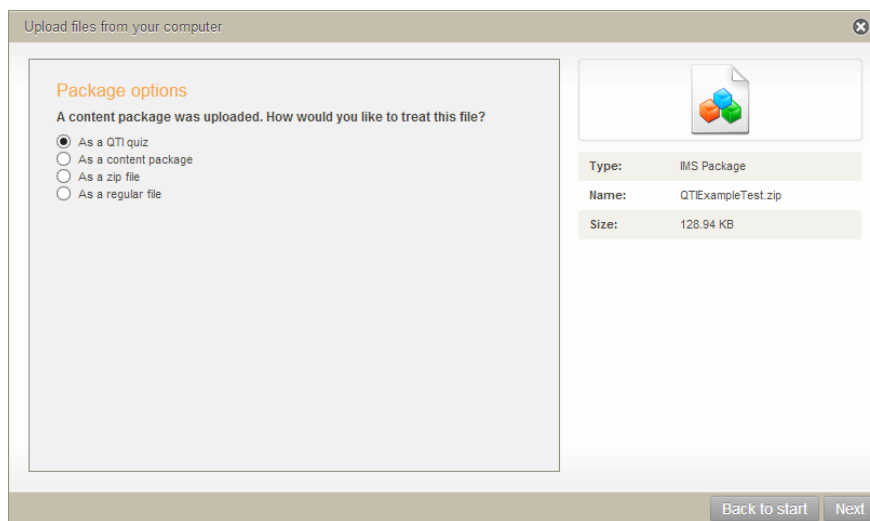
**Figure 80 Zip file options**

Select the required option:

- **Unzip the contents and allow me to select the files to attach** – selecting this option allows single files from the zip file to be attached to the resource.
- **Attach the zip file only** – attaches the zip file itself to the resource.

## Upload QTI packages

When a QTI package (a package conforming to the IMS QTI 2.1 standard) is uploaded during contribution, depending on how the system is configured to treat zip and package files by default, a **Package options** dialog may display. An example is shown in Figure 81.



**Figure 81 Package options**

Select the required option for '*How would you like to treat this file?*':

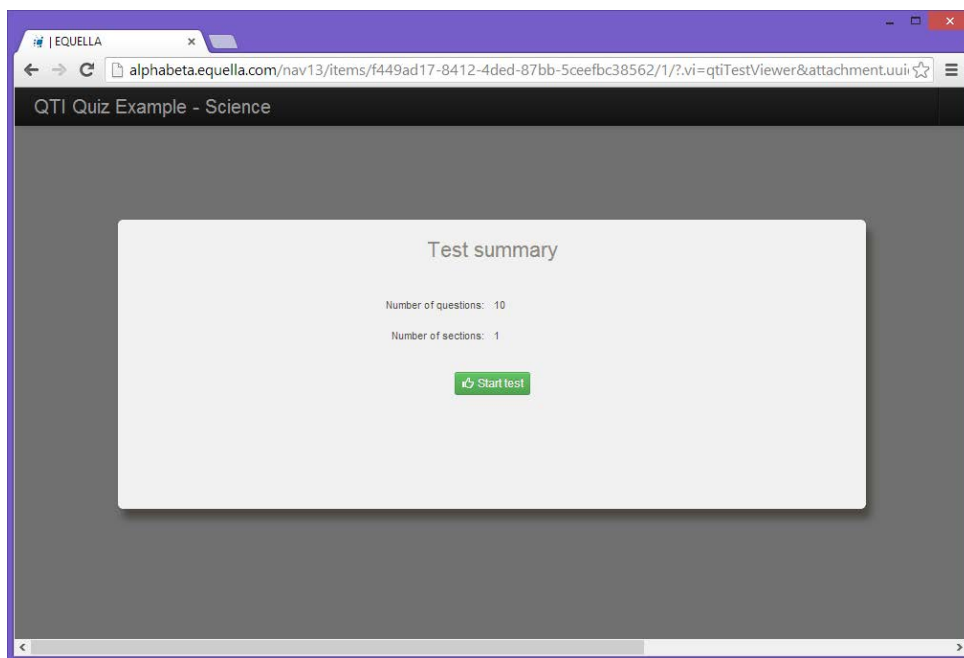
- **As a QTI package** – stores the package as a QTI package, allowing the quiz to be played using the default EQUELLA quiz player.
- **As a content package** – stores the package as an IMS package, ignoring any QTI functionality.
- **As a zip file** – selecting this option brings up the **Zip options** (see [Upload zip files](#) on page 62).
- **As a regular file** – stores as a file (without zip or package options).

## Playing QTI packages


Once a QTI package has been uploaded to an EQUELLA resource, and the resource has been saved, the package can be played. As long as it has been stored as a **QTI package**, the default QTI quiz player will be used. When QTI packages are played in EQUELLA, a score accumulates, but is not stored. Each time a user logs in, the quiz will restart.

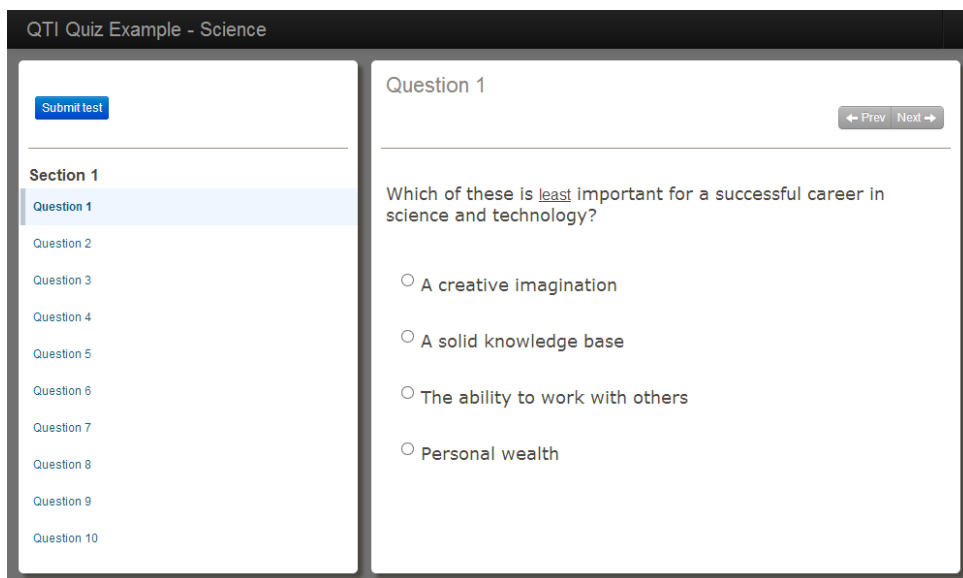
### To play a QTI quiz

1. From the results or Resource summary page, click on the required QTI package. The quiz start page displays. An example is shown in Figure 82.



**Figure 82 Example QTI quiz**

- Click the  button to begin the quiz. The question titles display down the left hand side of the page, and a single question's details show in the right-hand pane. An example is shown in Figure 83.



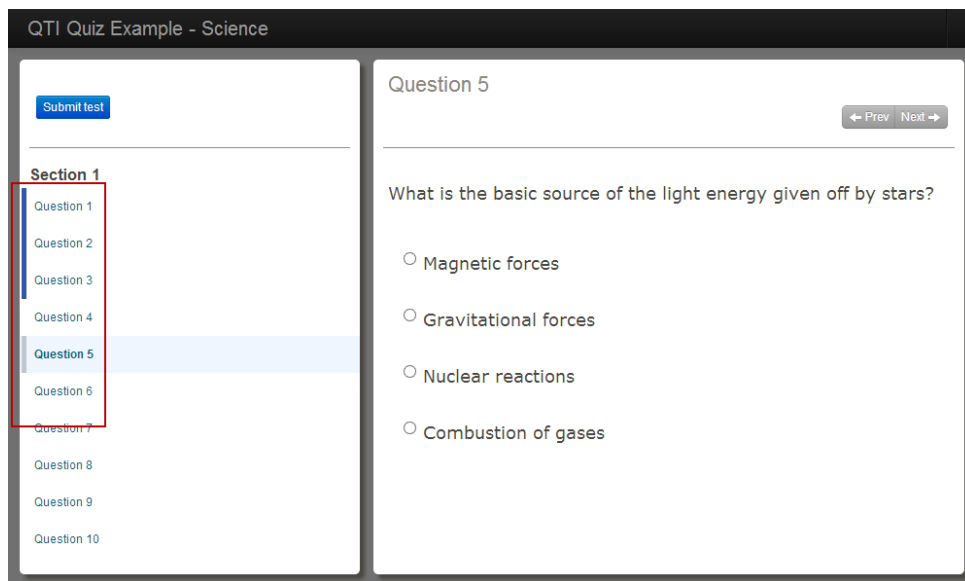
**Figure 83 Example quiz**

Note the following points:

- Once a question has been answered, a blue bar displays to the left of the question name in the left-hand question list.
- Unanswered questions have no bar.
- The question currently being viewed displays a grey bar to the left of the question name, until it is either answered or the user moves to another question.



An example is shown in Figure 84.

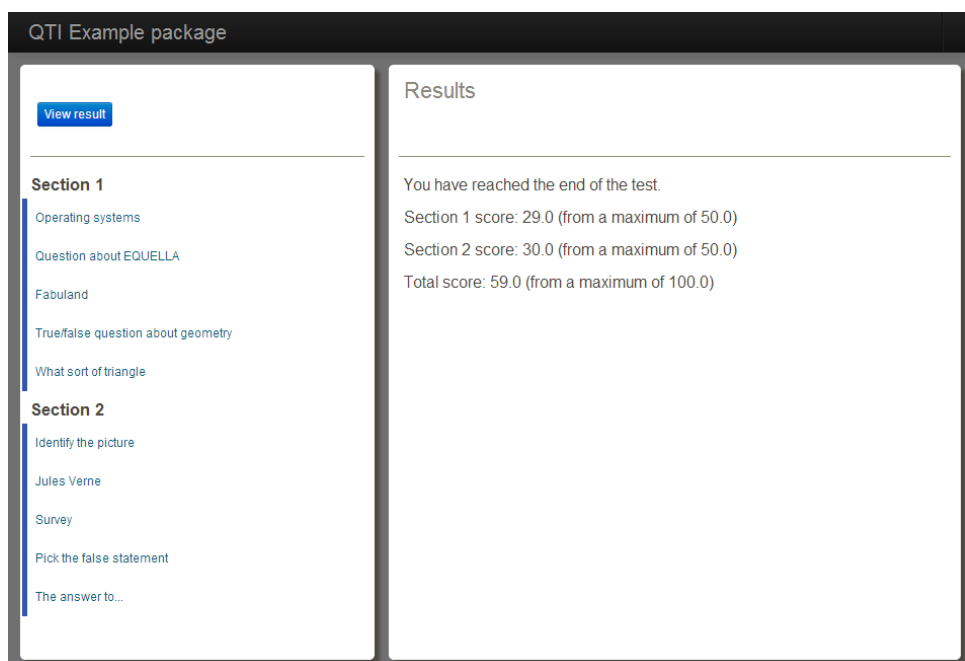


**Figure 84 Question status bars**

- Questions can be answered in any order.
- Once all questions have been answered, click the **Submit test** button (confirmation dialog displays) to view the score acquired (which doesn't get stored) and any feedback available for that QTI quiz.

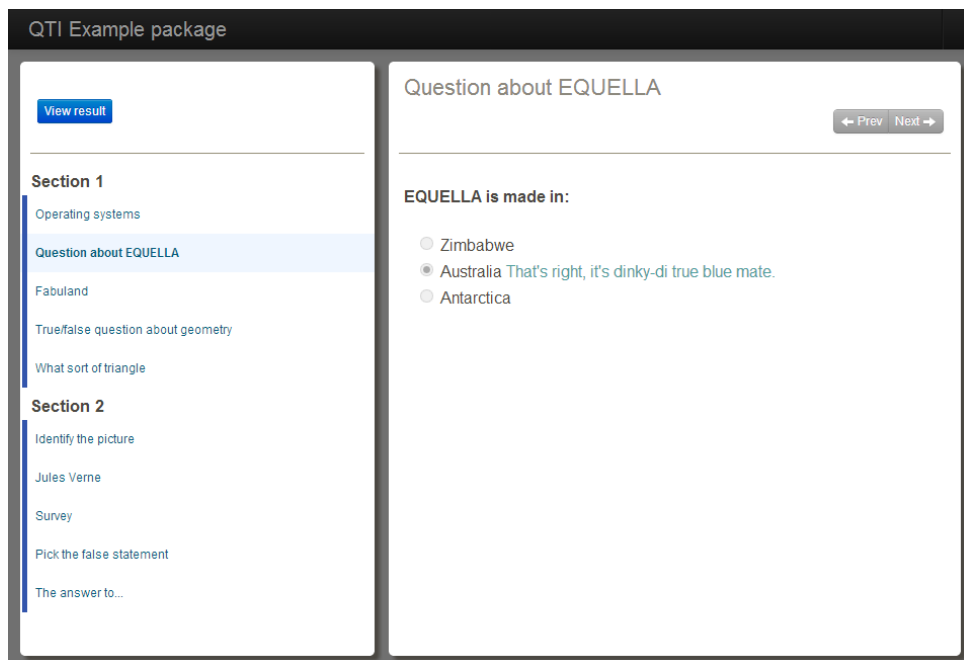
*NOTE: Not all QTI quizzes are configured to display results or feedback once they are submitted.*

An example is shown in Figure 85.



**Figure 85 Quiz results page**

Each question can be selected to view question level feedback, if included as part of the package. An example is shown in Figure 86.

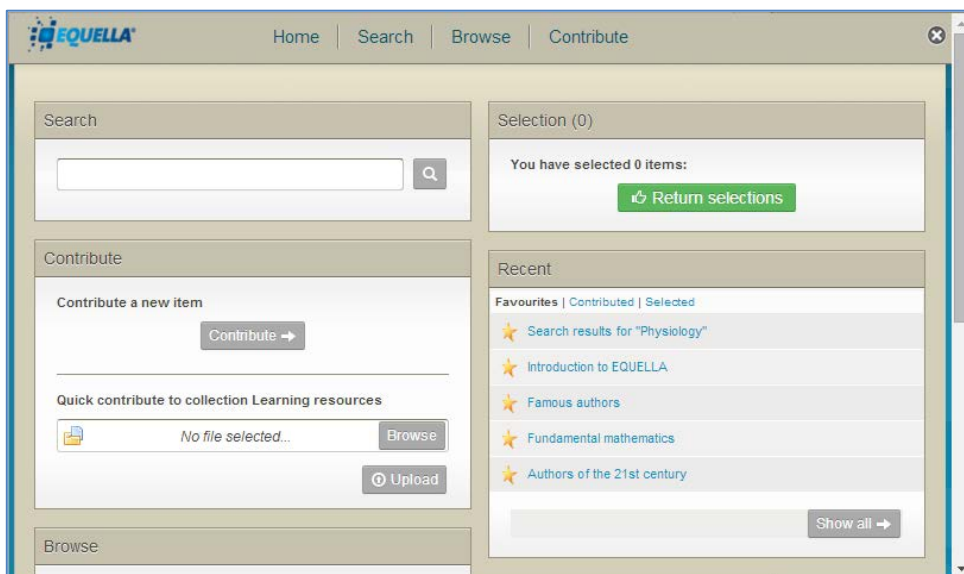


**Figure 86 Question level feedback**

To return to the results page, click [View result](#).

## EQUELLA Resource

Select **EQUELLA Resource** then click [Next](#) to add an attachment associated to an existing EQUELLA resource. The **Select** page displays, as shown in Figure 87.



**Figure 87 Select screen – Home page**

The **Select** screen has the following links at the top of the page:



**Home** – click to return to the home page, as seen in Figure 87.

**Search** – click to open the standard EQUELLA Search page.

**Browse** – click to browse results from hierarchy topics and sub-topics.

**Contribute** – click to contribute a new resource to EQUELLA.

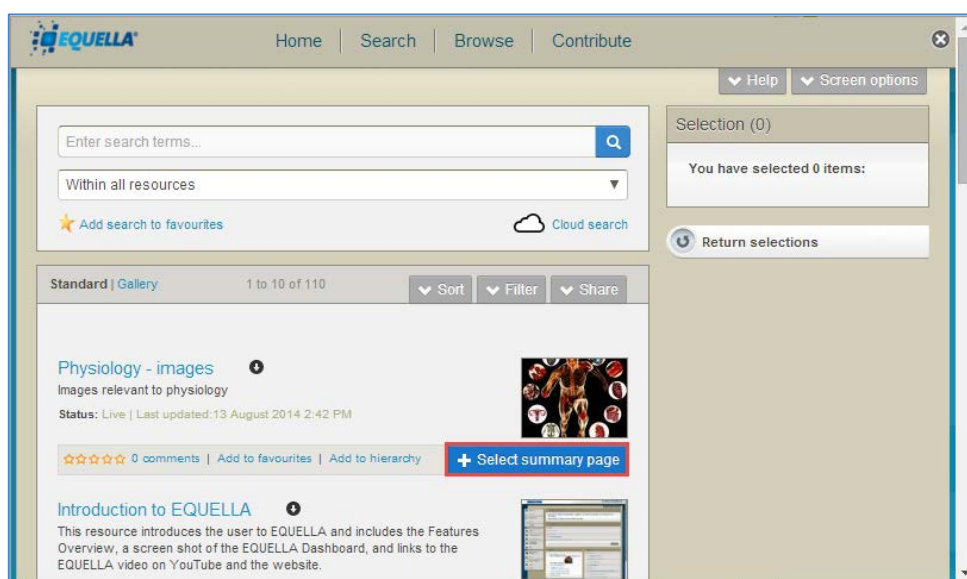
## Select buttons

All the Select buttons on the results and summary pages initially look the same (  ), but there are differences between the functions of some of them. Hovering the mouse over the buttons expand their labels. The exceptions are the Select buttons beside each attachment, which always show as .


To view the Select button labels, hover over a button to view the button label. Buttons that have labels are:

### Select summary page

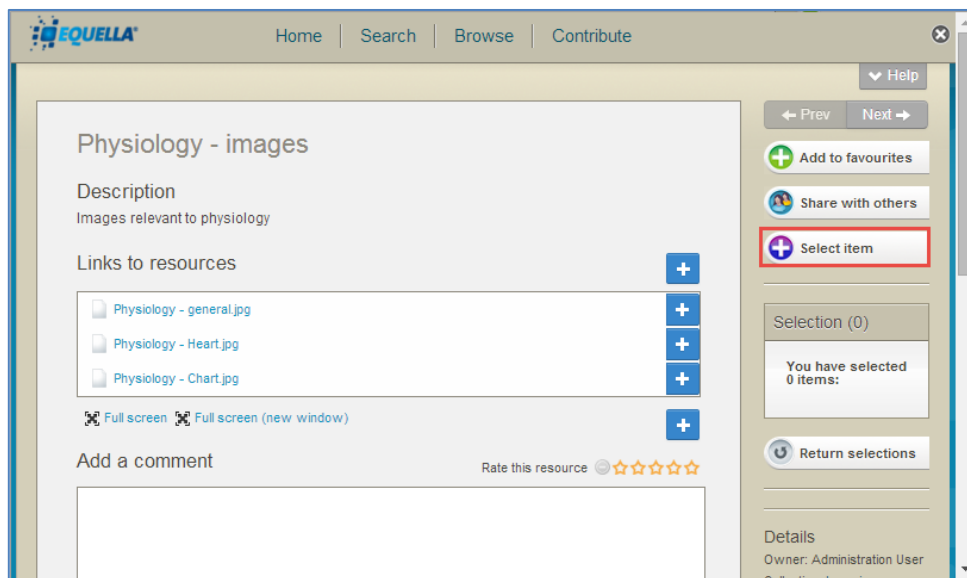
The **Select summary page** button can display on the results and summary pages, depending on institution configuration. An example on the results page is shown in Figure 88.



**Figure 88 Select summary page button on result page**

To select the summary page from the Resource summary page, click the  Select item button.

An example on the Resource summary page is shown in Figure 89.

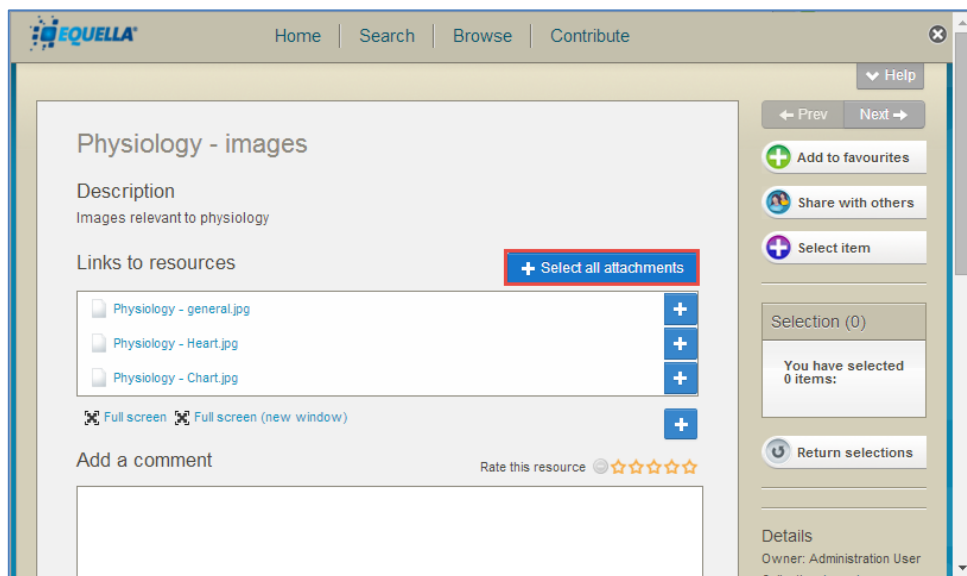


**Figure 89 Select summary page button on Resource summary page**

When this button is selected, a link to the **Resource summary page** for this resource is added to the attachments list on the contribution wizard page.

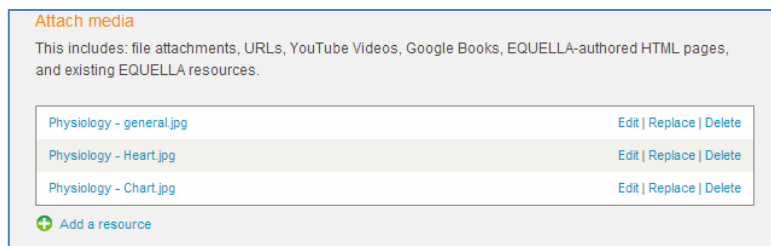
### Select all attachments

The **Select all attachments** button displays on the summary page. An example is shown in Figure 90.



**Figure 90 Resource summary page - Select all attachments button**

When this button is selected, a single link for each attachment is added to the attachment list on the contribution wizard page. An example is shown in Figure 91.

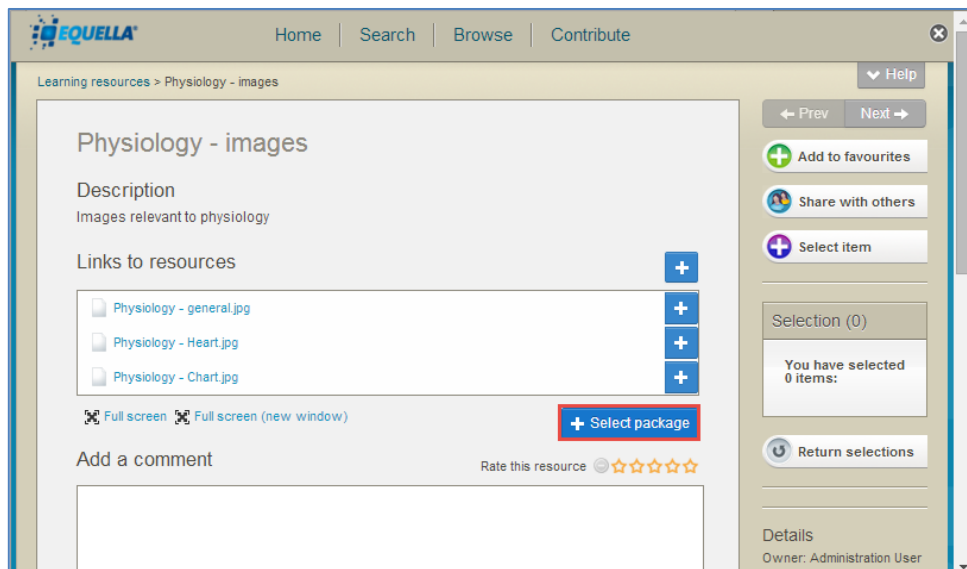


**Figure 91 Contribution wizard page with single links for each attachment**

Clicking on a link opens the single attachment in its default viewer.

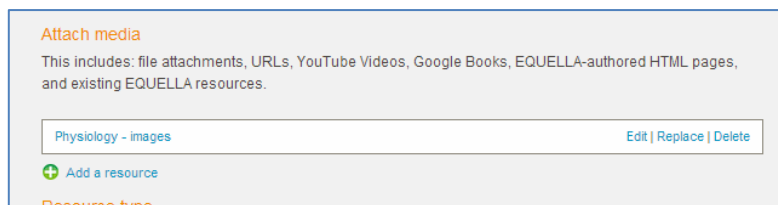
## Select package

The **Select package** button displays on the Resource summary page. An example is shown in Figure 92.



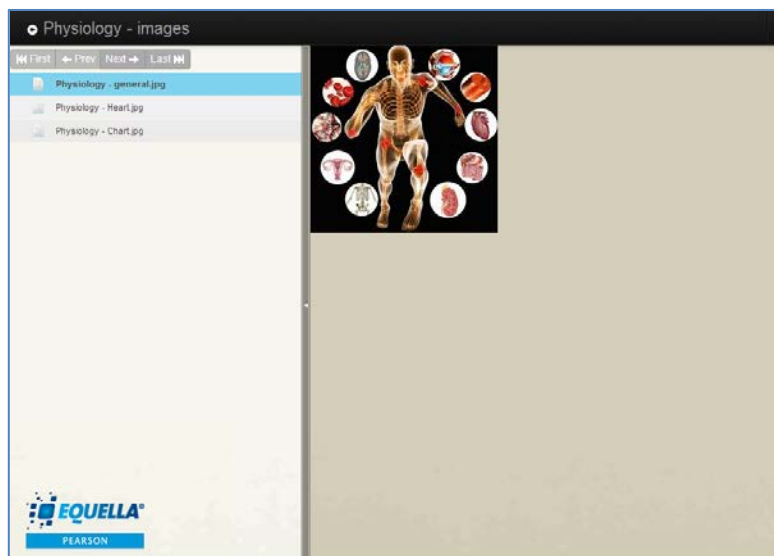
**Figure 92 Resource summary page - Select package button**

When this button is selected, a single link for all the attachments is added to the attachment list on the contribution wizard page. An example is shown in Figure 93.



**Figure 93 Contribution wizard page with single link for all attachments**




Clicking on the link opens the attachments in the package viewer. An example is shown in Figure 94.

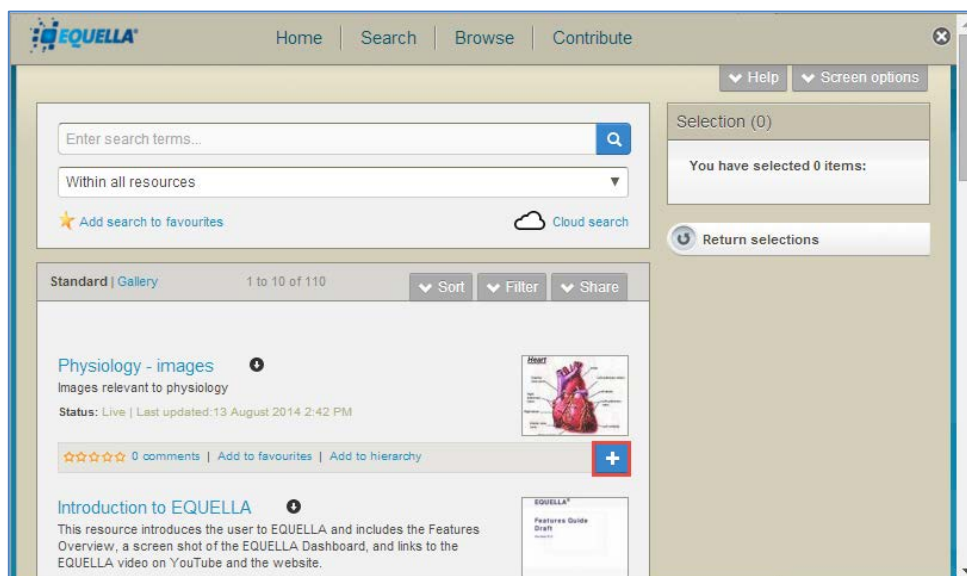


**Figure 94 Package link - opens the package viewer where all attachments can be viewed**

## Selecting items

To select attachments, summary pages and packages using the Select buttons

1. Click  beside the required attachment/s, summary page/s or package/s to add them as a selection.
- Resource summary pages can be selected from the results page by clicking the  button in the footer of each result or by opening the Resource summary page and clicking the  Select item button (see [Select summary page](#) on page 67 for further information). An example from the results page is shown in Figure 95.



**Figure 95 Selecting summary page from search results page**

- **Attachments** can be selected from the results page by clicking the ⓘ icon to open the attachment display or by opening the summary page, then clicking the + button/s beside the relevant attachments. An example from the results page is shown in Figure 96.

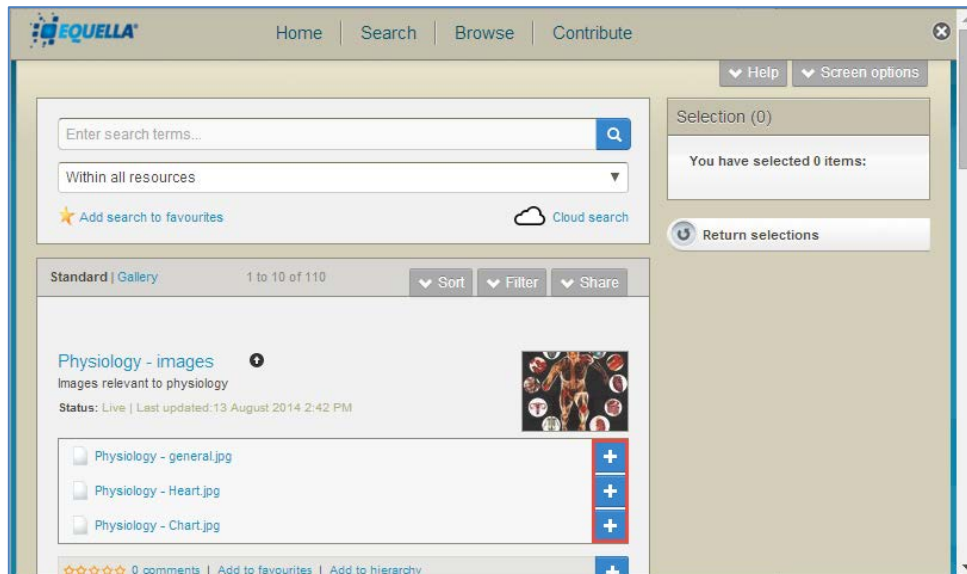


Figure 96 Selecting attachments from search results page

- **All attachments** (each showing as a single link) can be selected by opening the summary page, then clicking the + button beside the **Links to resources** heading (see [Select all attachments](#) on page 68 for further information). An example is shown in Figure 97.

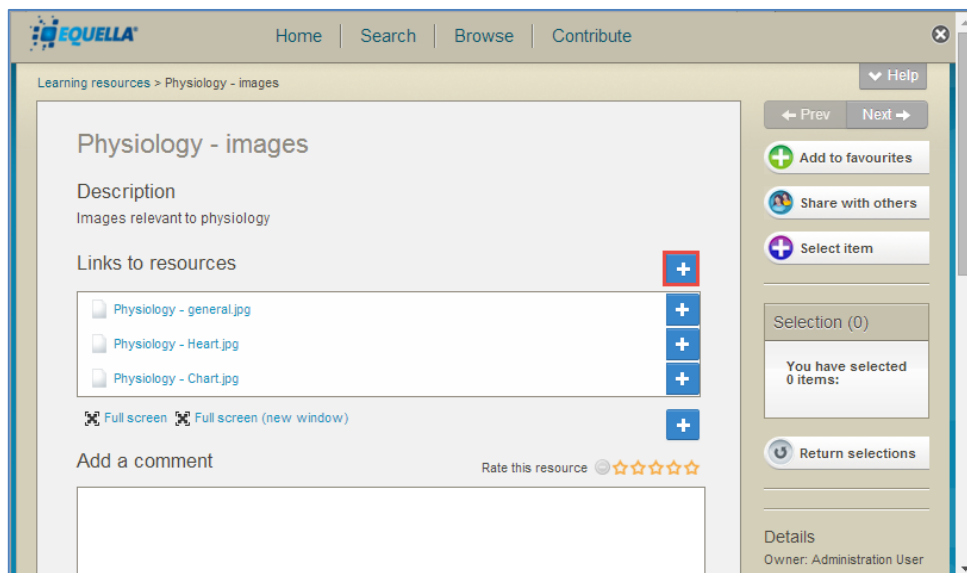
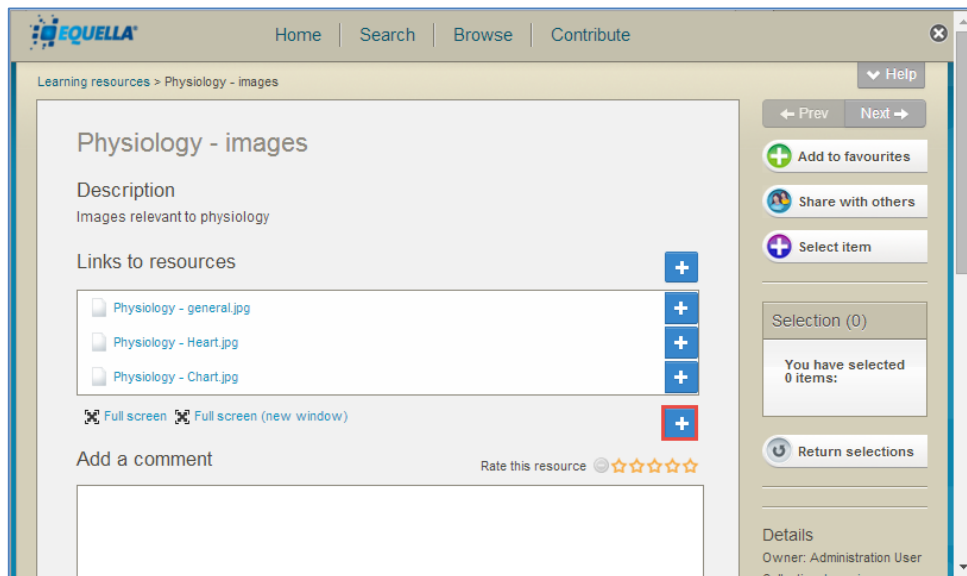


Figure 97 Selecting 'All attachments' button from the summary page

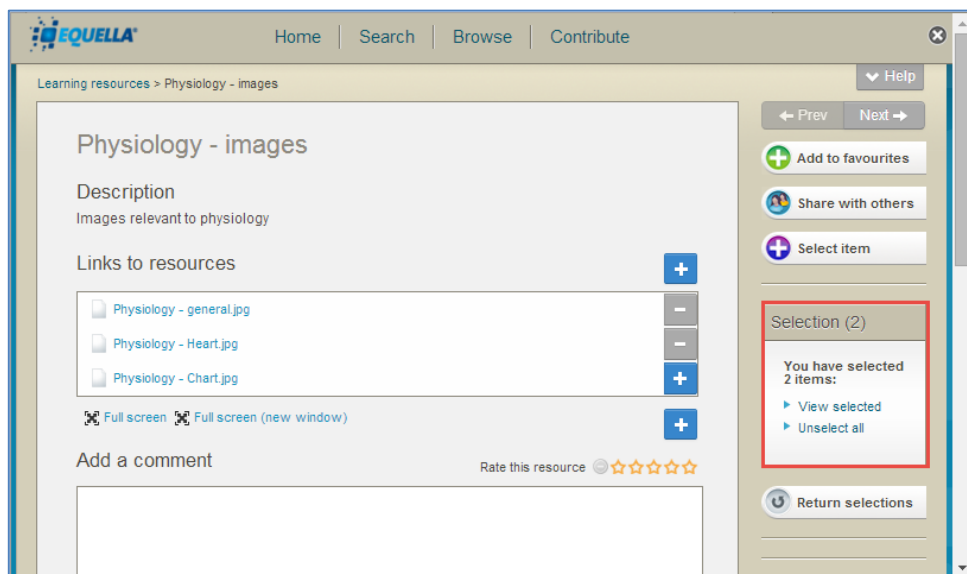
- **Select package** (showing as a single link that displays as a package in the course) can be selected by opening the summary page, then clicking the + button

underneath the attachment list (see [Select package](#) on page 69 for further information). An example is shown in Figure 98.



**Figure 98 Selecting package from summary page**

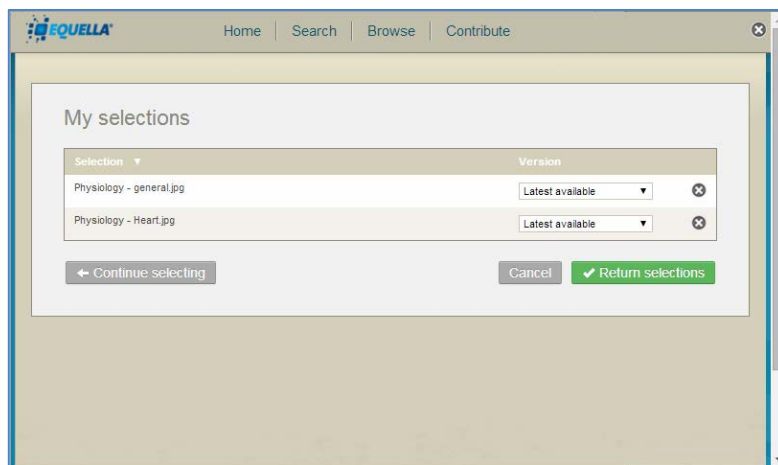
The **Selection panel** displays the number of items selected, and enables the user to **View selected** or **Unselect all**. An example is shown in Figure 99.



**Figure 99 Selection panel**

- Once all required items are selected, click . The **My selections** dialog displays. An example is shown in Figure 100.

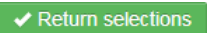




**Figure 100 My selections dialog**


Select the required version option (if applicable).

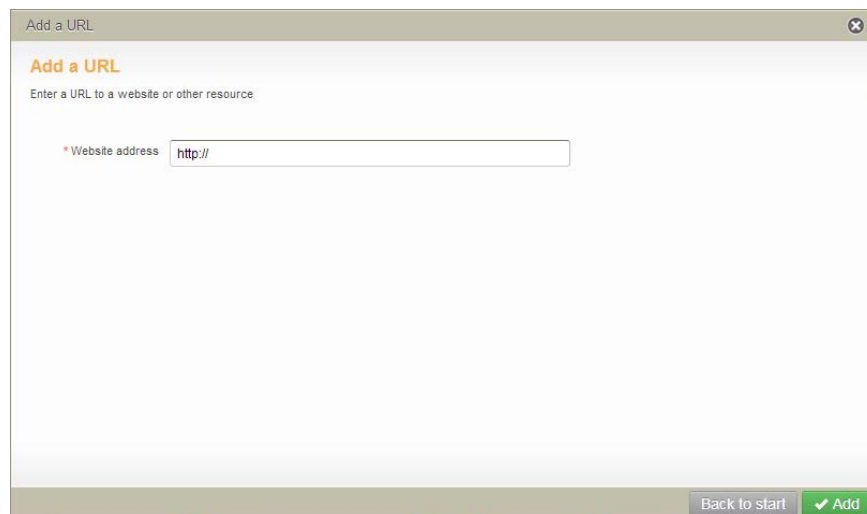
Click  to remove a selection.

- Click . The selections display in the attachments list on the contribution wizard page.

## URL

To add a URL link

- Select **URL** then click  to add a URL. The **Add a URL** page displays, as shown in Figure 101.



**Figure 101 Add a URL page**

- Enter the URL (e.g. <http://www.equella.com>) and click . The **Edit URL details** page displays as shown in Figure 102.

http://www.equilla.com

**Edit attachment**

\* Display name

\* Website address

\* indicates mandatory fields

Type: URL Link

URL: http://www.equilla.com

[Open URL in new window](#)

[Back to start](#) [Save](#)

**Figure 102 Edit URL details page**

The **Display name** can be changed to something more meaningful than the actual web address if required (e.g. *EQUELLA website*), but the **Website address** must be prefixed with `http://`, not just `www`, or it won't work.

3. Click the **Open URL in new window** to go to the URL website. This is a good way to test that the web address entered is correct.
4. Click [Save](#) to return to the contribution wizard page. The EQUELLA website link now displays as an attachment.

## Web pages

### To add a web page link

1. Select **Web pages** then click [Next](#) to add a web page. The **Create web pages** page displays, as shown in Figure 103.

Create web pages

**Pages**

You currently have no pages to edit. Click the Add Page link below to begin editing pages.

[Add Page](#) [Import pages from scrapbook](#)

[Back to start](#)

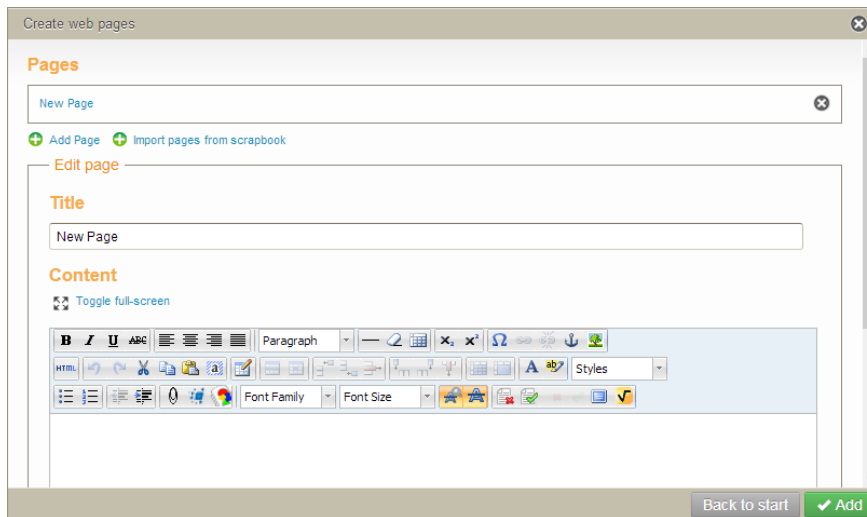
**Figure 103 Create web pages**

The **Add Page** link allows the user to open the EQUELLA HTML Editor and create web pages. The **Import pages from scrapbook** allows the user to select existing web pages from their Scrapbook.

## Add Page link

### To add a page link

1. Click the **Add Page** link to open the **Edit Page** section, as shown in Figure 104.



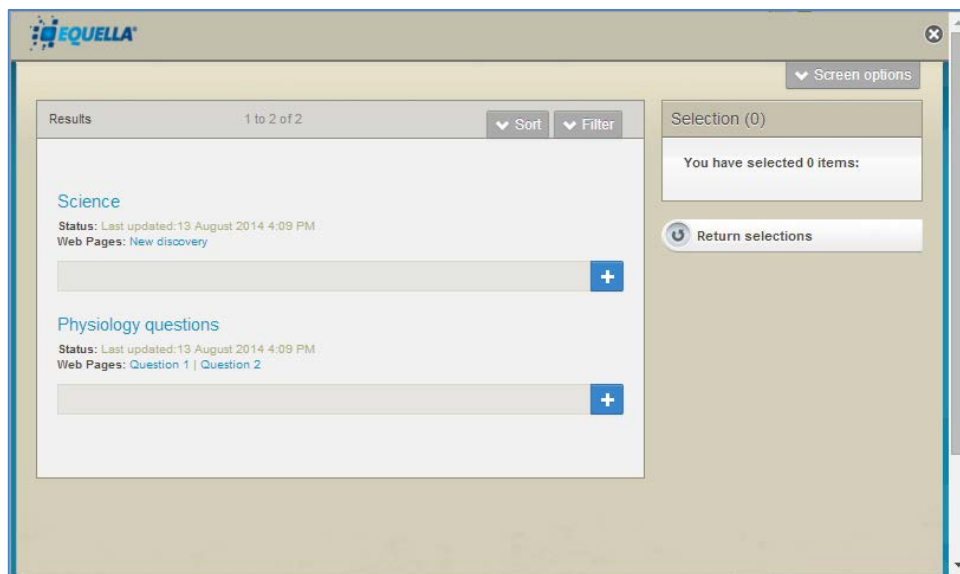
**Figure 104** Create web pages—Edit page

2. Click the **Toggle full-screen** link to open the Edit page in a full screen.
3. Enter a **Title** and use the editor to enter the content in the **Content** section. See *EQUELLA HTML Editor Guide* for more information.
4. Click **✓ Add** to return to the contribution wizard page. The web page link now displays as an attachment.

## Import pages from the scrapbook link

### To import pages from the scrapbook link

1. Click the **Import pages from scrapbook** link to open the **Select from scrapbook** page. An example is shown in Figure 105.



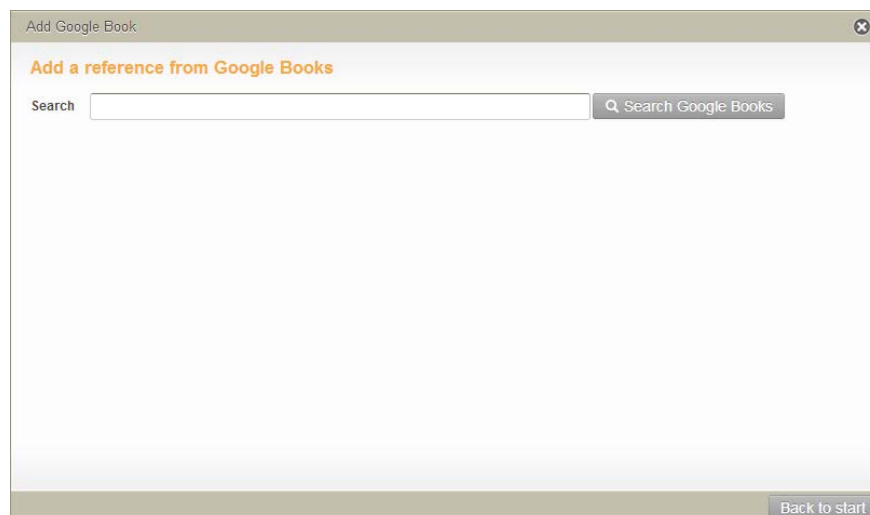
**Figure 105 Select from scrapbook page**

- Click the **+** button next to the required web pages, then click **Return selections**. The **My selections** page displays with the selections listed. Click **Return selections**, then **Save**. The selected web pages are now displayed on the contribution wizard page as attachments.

## Google Books

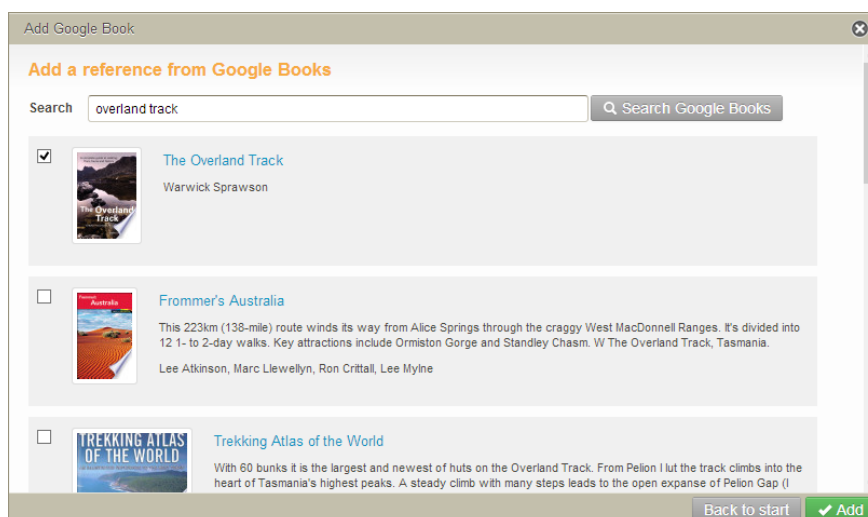
### To add a Google Books link

- Select **Google Books** then click **Next** to add a Google Books link. The **Add Google Book** page displays, as shown in Figure 106.




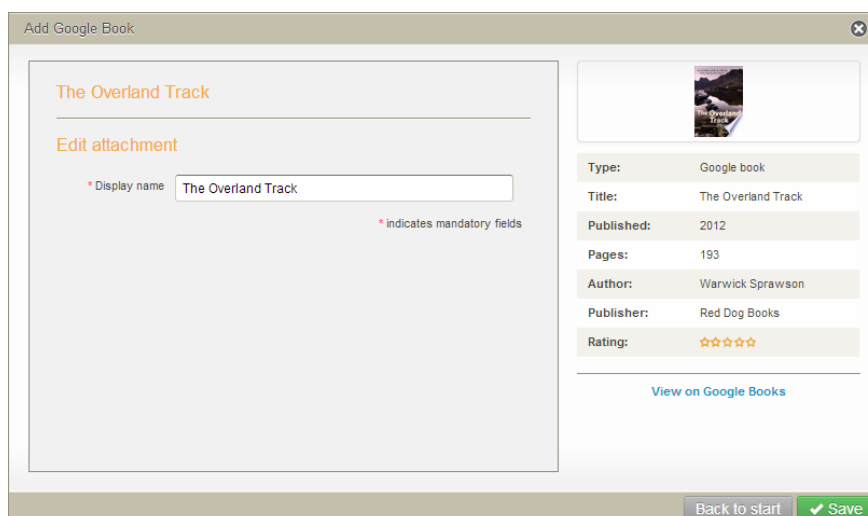
**Figure 106 Add Google Book page**

- Enter search criteria (e.g. overland track) then click **Search Google Books**. The search results display. An example is shown in Figure 107.




**Figure 107 Google Book search results**


3. Select the required references then click . If multiple selections are made, the contribution wizard page displays with the selected attachments listed. They can be edited or deleted from the list. See [Edit attachments](#) on page 94 for more information. If only one Google Book link has been selected, the **Edit Google Book details** page displays. An example is shown in Figure 108.

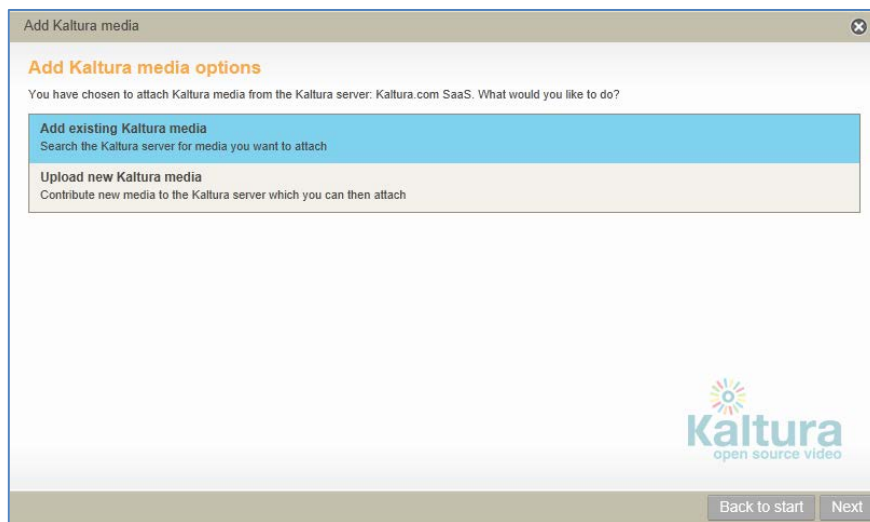


**Figure 108 Edit Google Book details page**

4. Click the **View on Google Books** link to open Google Books and view the resource.
5. Edit the **Display name** if required, then click . The contribution wizard page displays with the Google Book link listed.

## Kaltura

Select **Kaltura** then click  to display the **Add Kaltura media** page, as shown in Figure 109.



**Figure 109 Add Kaltura media page**

Click **Back to start** to go back to the Pick resource type page.

The *Add Kaltura media* page provides the user with two options, **Add existing Kaltura media** and **Upload new Kaltura media**.

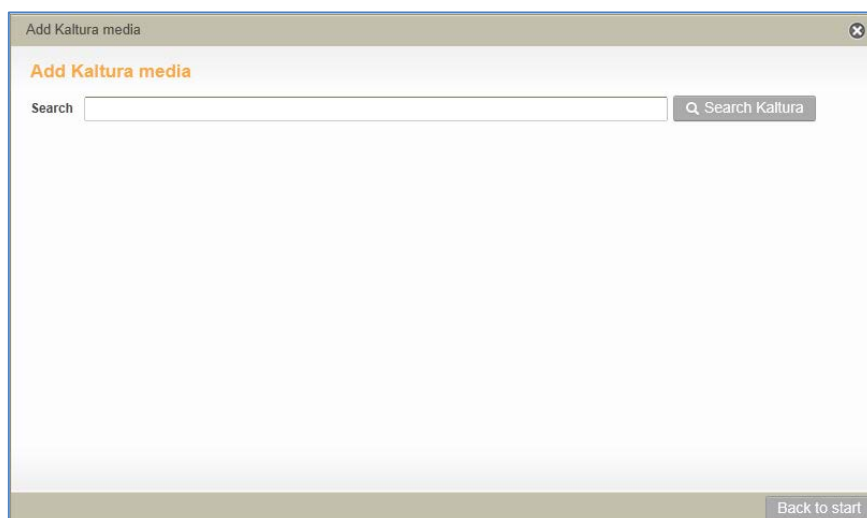
*NOTE: Some institutions may be restricted to one of these options, in which case this step will not display.*

## Add existing Kaltura media

Selecting the **Add existing Kaltura media** option allows the user to search the Kaltura server for a relevant streaming media item then attach the link to the resource being contributed.


### To add existing Kaltura media

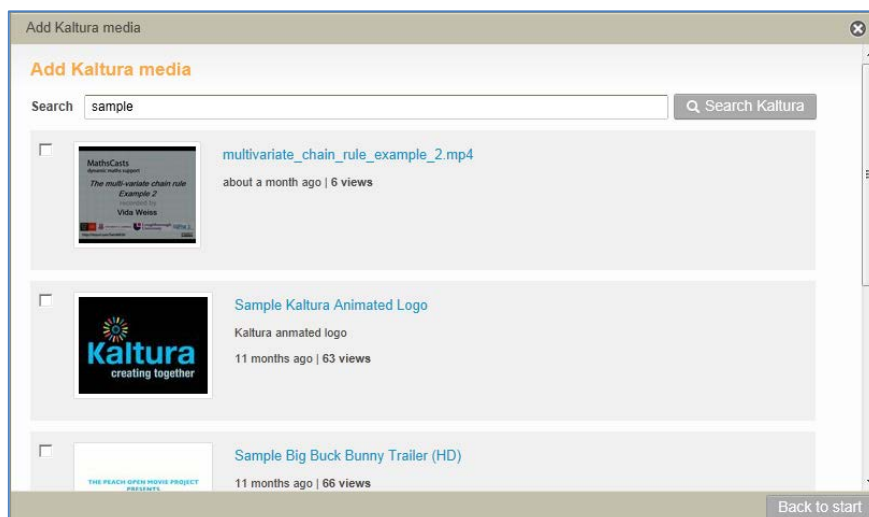
1. Click **Next** to display the **Add Kaltura media** search page, as shown in Figure 110.




**Figure 110 Add Kaltura media search page**

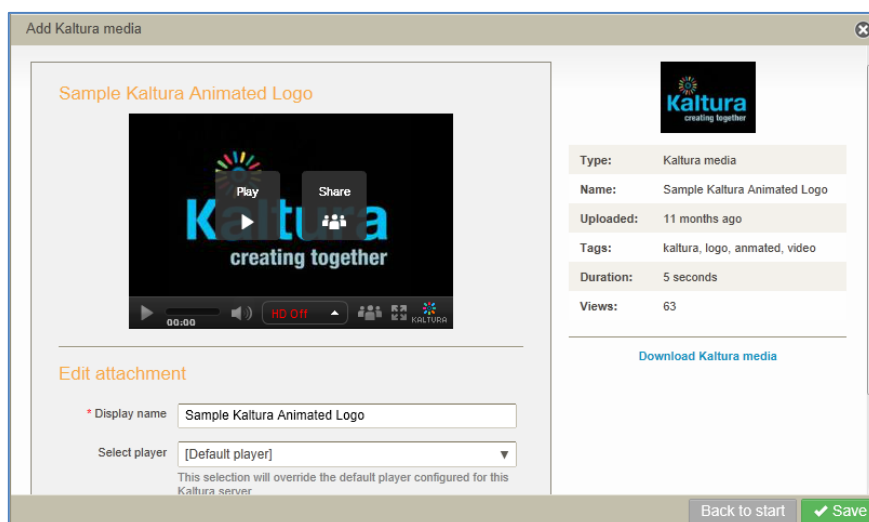
*NOTE: Kaltura does not allow the use of wildcards. Additionally, a full word match must be made to return results.*

2. Enter search criteria (e.g. sample) then click . The search results display. An example is shown in Figure 111.



**Figure 111 Add Kaltura media search results**

3. Select the required items then click . If multiple selections are made, the contribution wizard page displays with the selected attachments listed. They can be edited or deleted from the list. See [Edit attachments](#) on page 94 for more information. If only one Kaltura video link has been selected, the **Edit Kaltura media** page displays. An example is shown in Figure 112.

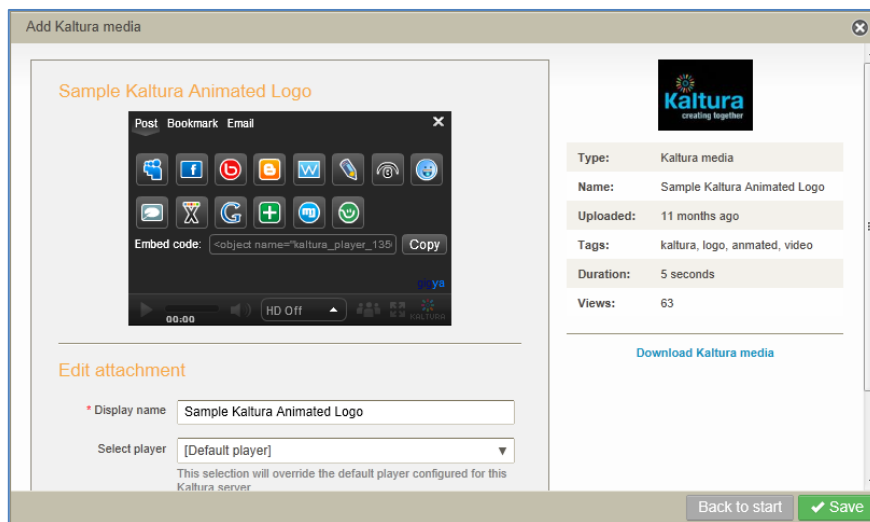


**Figure 112 Edit Kaltura media page**


4. Click  to play the streaming media item, or  to display share options.

*NOTE: The icons may differ depending on the player being used. Additionally, if the file is large, it may still be processing at this point.*

An example of the share options is shown in Figure 113.



**Figure 113 Kaltura share options page**

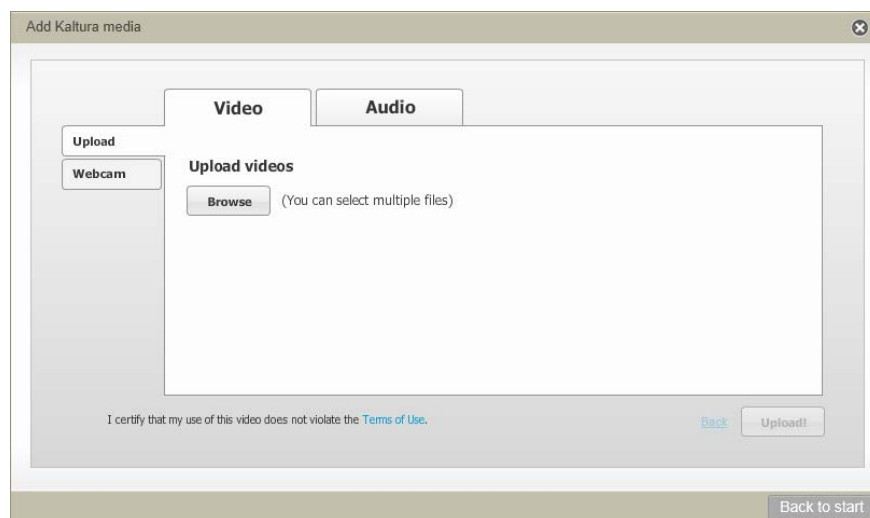
5. Edit the **Display name** if required. This is the name EQUELLA attachment name. The name is not changed in Kaltura.
6. Select the required player from the **Select player** drop-down. The [Default player] is the player selected as the default for this Kaltura server (see the EQUELLA Administration Overview Guide for further information).
7. Click  **Save**. The contribution wizard page displays with the Kaltura media link listed.

## Upload new Kaltura media

Selecting the **Upload new Kaltura media** option allows the user to record a video using a webcam, or upload one or more local video or audio files to the Kaltura server, then attach the link/s to the resource being contributed.

### To upload an existing video or audio file

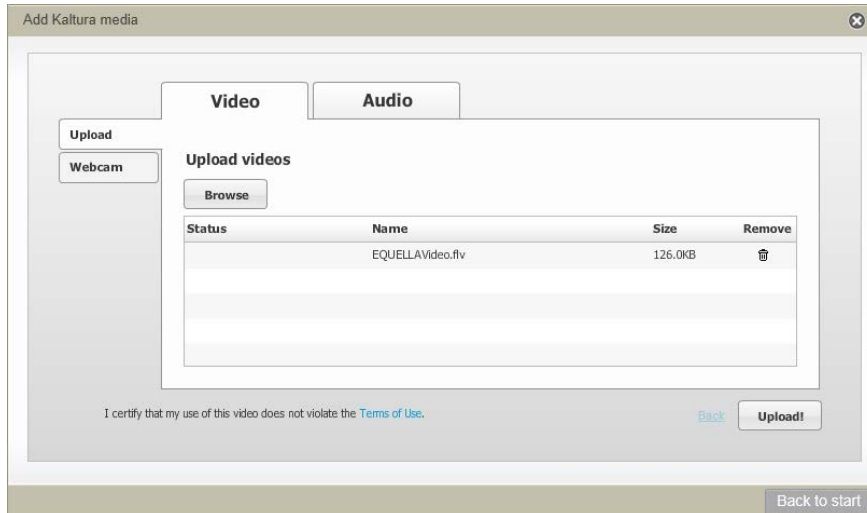
1. Click  **Next** to display the **Add Kaltura media** search page, as shown in Figure 114.



**Figure 114 Add Kaltura media - Upload videos page**

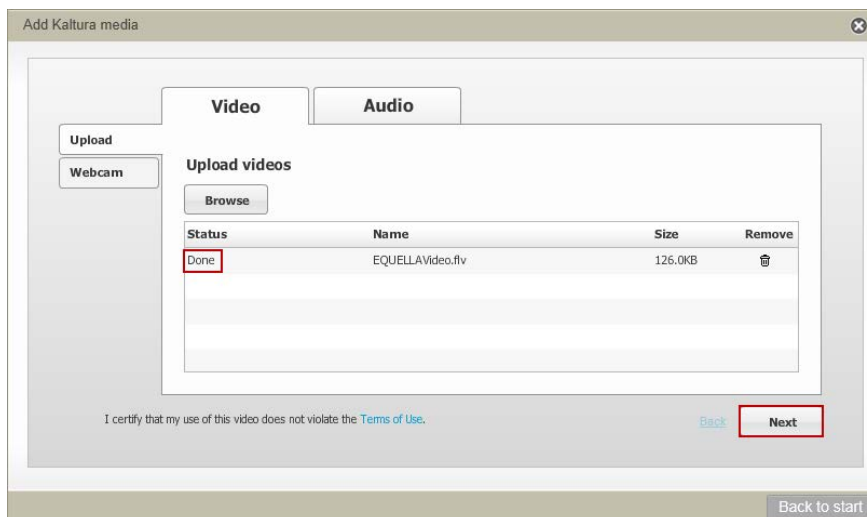


2. Select either the **Video** or **Audio** tabs.
3. Click  and select the required video or audio file/s and select **Open**. Multiple files can be selected. The file/s display on the Upload videos page. An example is shown in Figure 115.



**Figure 115 Selected video files to be uploaded to Kaltura server**

4. Click  to add more video files, or to remove a file from the list. Click  to start the upload to the Kaltura server. Once the upload is complete, the Status of the file displays as **Done**. An example is shown in Figure 116.



**Figure 116 Kaltura upload complete**

5. Click  to add more video files, or click  to open the **Add Kaltura media – Title and Tags** page. An example is shown in Figure 117.

Add Kaltura media

Video Audio

Upload Webcam

Title: EQUELLA Overview video

Tags: marketing, features

Category: Select Category

Description:

I certify that my use of this video does not violate the [Terms of Use](#).

Back Next

Back to start

**Figure 117 Add Kaltura media - Title and Tags**

6. Change the title if required, then add required tags (keywords) in the **Tags** field, using a comma to separate each entry.
7. Select a **Category** from the drop-down list, if relevant. Categories can only be configured and browsed from the Kaltura Management Console (KMC).
8. Enter a **Description**, if relevant.

*NOTE: If multiple files have been uploaded, the Title, Tags, Category and Description fields can be edited for each file by clicking on the required file thumbnail on the left. An example is shown in Figure 118.*

Add Kaltura media

Video Audio

Upload Webcam

1.

2.

Title: barsandtone.flv

Tags:

Category: Select Category

Description:

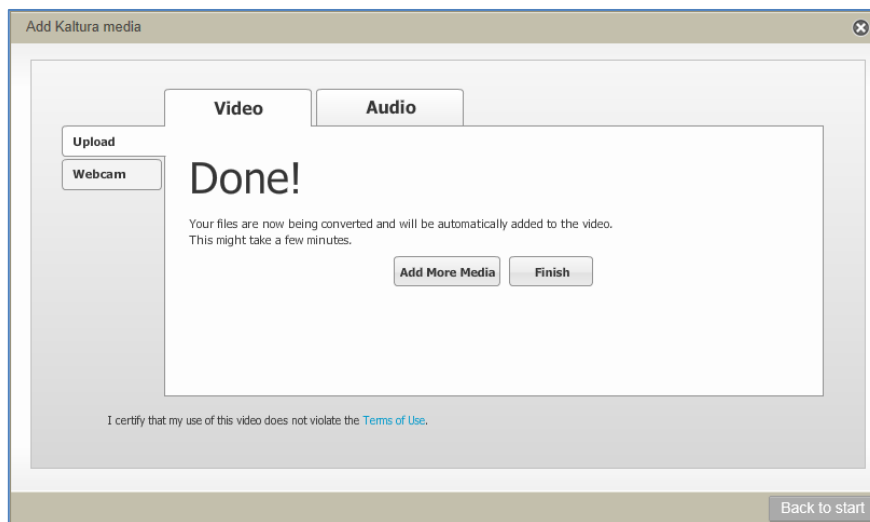
I certify that my use of this video does not violate the [Terms of Use](#).

Back Next

Back to start

**Figure 118 Multiple file upload with thumbnails**

9. Click Next. The page shown in Figure 119 displays.

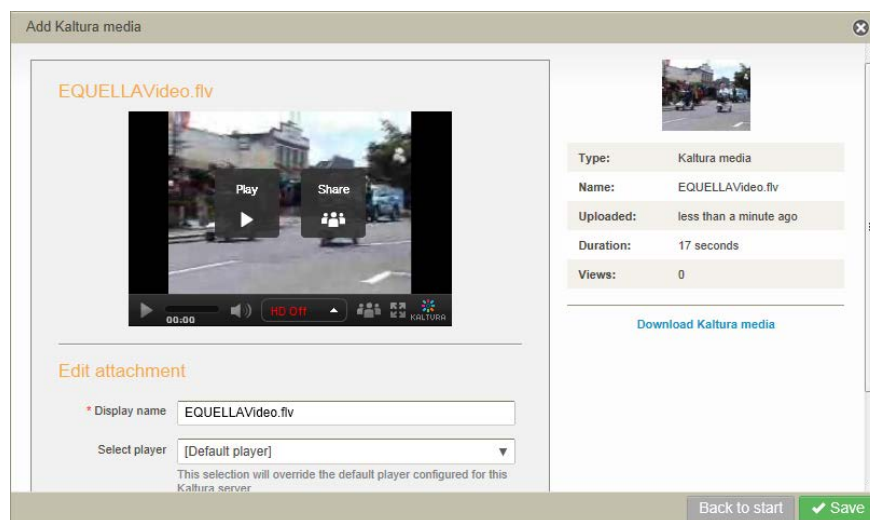


**Figure 119 Kaltura files successfully added**

10. Click **Add More Media** to return to the start or **Finish** to complete the process.

If multiple files have been uploaded a page listing the files displays, and the user selects the files to be attached to the resource. If multiple files are selected, the contribution wizard page displays with the selected attachments listed. They can be edited or deleted from the list. See [Edit attachments](#) on page 94 for more information.

If only one Kaltura video has been uploaded, the **Edit attachment** page displays. An example is shown in Figure 120.



**Figure 120 Edit Kaltura media page**

*NOTE: The Kaltura conversion process can take some time to complete, depending on the number of files waiting for conversion, file sizes etc. It is safe to save the attachment prior to the completion of the conversion process.*

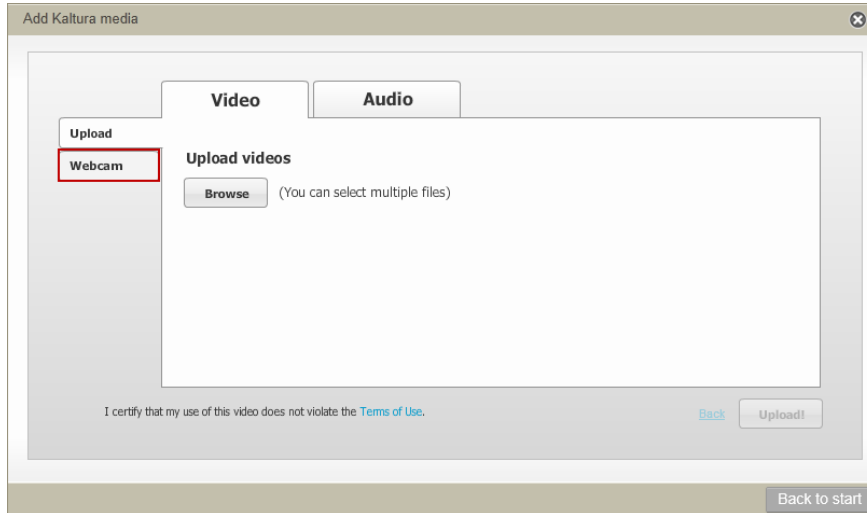
11. Edit the **Display name** if required.

12. Select the required player from the **Select player** drop-down. The [Default player] is the player selected as the default for this Kaltura server (see the EQUILLA Administration Overview Guide for further information).

13. Click  **Save**. The contribution wizard page displays with the Kaltura media link listed.

### To record and upload a file to Kaltura

1. Click  **Next** to display the **Add Kaltura media** search page, as shown in Figure 121.

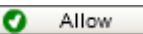


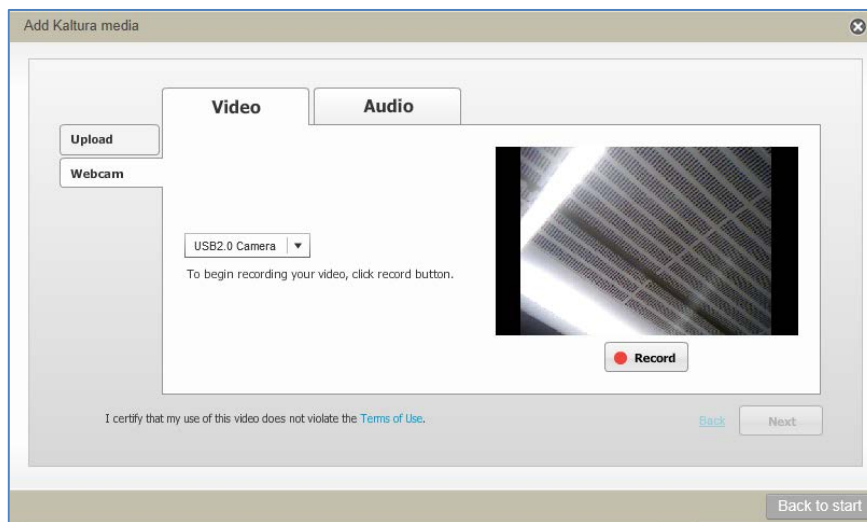
**Figure 121 Add Kaltura media – Webcam tab**

2. Select the **Webcam** tab on the left-hand side. An Adobe Flash Player Settings confirmation dialog displays, as shown in Figure 122.








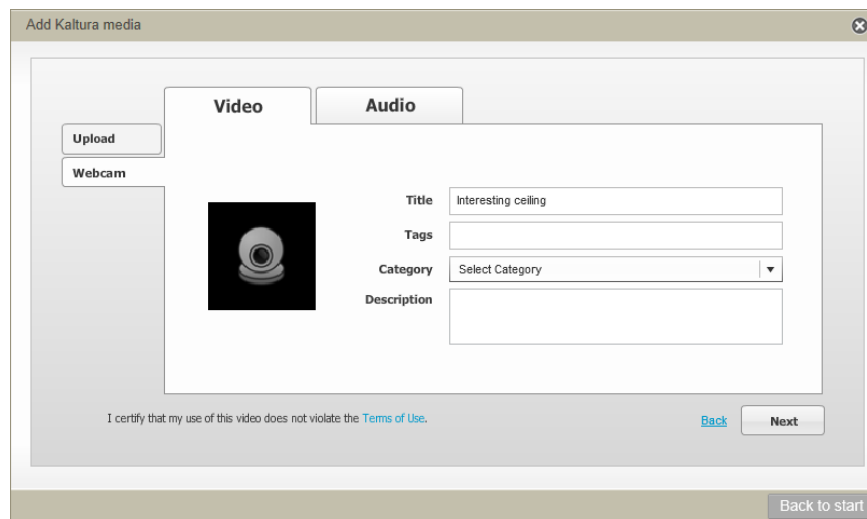
**Figure 122 Adobe confirmation dialog**

3. Click  **Allow**. The **Add Kaltura media** dialog displays, with a drop-down to select the camera to be used. This defaults if there is only one. An example is shown in Figure 123.




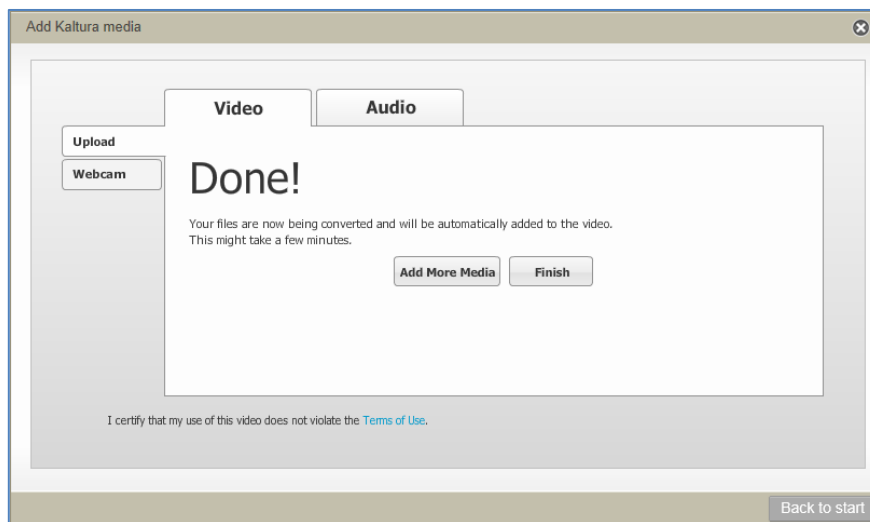
**Figure 123 Add Kaltura media - Webcam enabled**

4. Click  to begin recording.
5. Record the video, then click .
6. Click  to view the video, or  to rerecord (this will overwrite the prior recording).
7. Once happy with the recording, click . The Title and tags page displays. An example is shown in Figure 124.



**Figure 124 Title and tags**

8. Enter a title, then add required tags (keywords) in the **Tags** field (if relevant), using a comma to separate each entry.
9. Select a **Category** from the drop-down list, if relevant. Categories can only be configured and browsed from the Kaltura Management Console.
10. Enter a **Description**, if relevant.
11. Click . The page shown in Figure 125 displays.

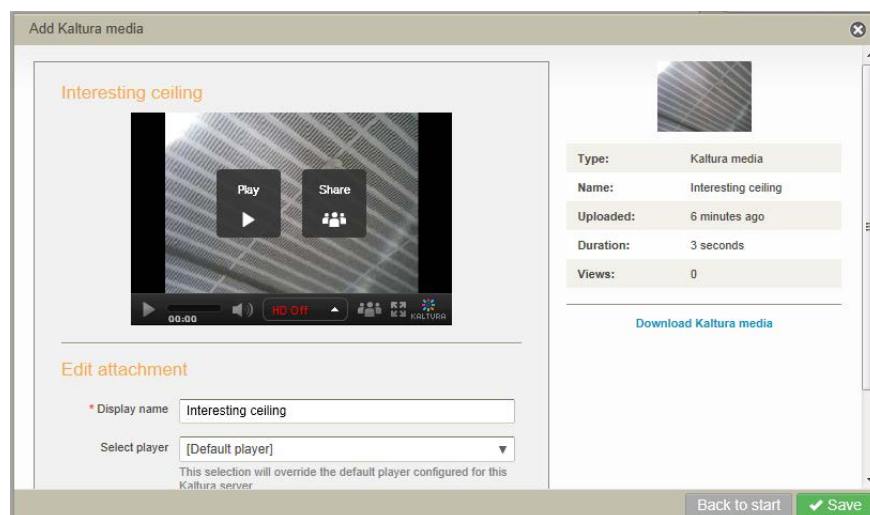


**Figure 125 Kaltura files successfully added**

12. Click **Add More Media** to return to the start or **Finish** to complete the process. There may be a delay while the file is being processed by Kaltura.

If multiple files have been uploaded a page listing the files displays, and the user selects the files to be attached to the resource. If multiple files are selected, the contribution wizard page displays with the selected attachments listed. They can be edited or deleted from the list. See [Edit attachments](#) on page 94 for more information.

If only one Kaltura video has been uploaded, the **Edit attachment** page displays. An example is shown in Figure 126.



**Figure 126 Edit Kaltura media page**

*NOTE: The Kaltura conversion process can take some time to complete, depending on the number of files waiting for conversion, file sizes etc. It is safe to save the attachment prior to the completion of the conversion process.*

13. Edit the **Display name** if required.

14. Select the required player from the **Select player** drop-down. The [Default player] is the player selected as the default for this Kaltura server (see the EQUELLA Administration Overview Guide for further information).
15. Click ✔ Save. The contribution wizard page displays with the Kaltura media link listed.

## YouTube

### To add a YouTube link

1. Select **YouTube** then click Next to add a YouTube link. The **Add YouTube** page displays, as shown in Figure 127.

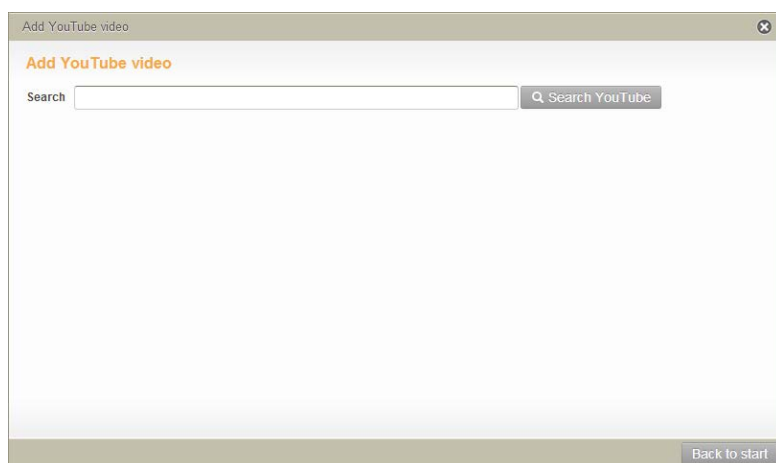


Figure 127 Add YouTube page

2. Enter search criteria (e.g. equella) then click Q Search YouTube. The search results display. An example is shown in Figure 128.

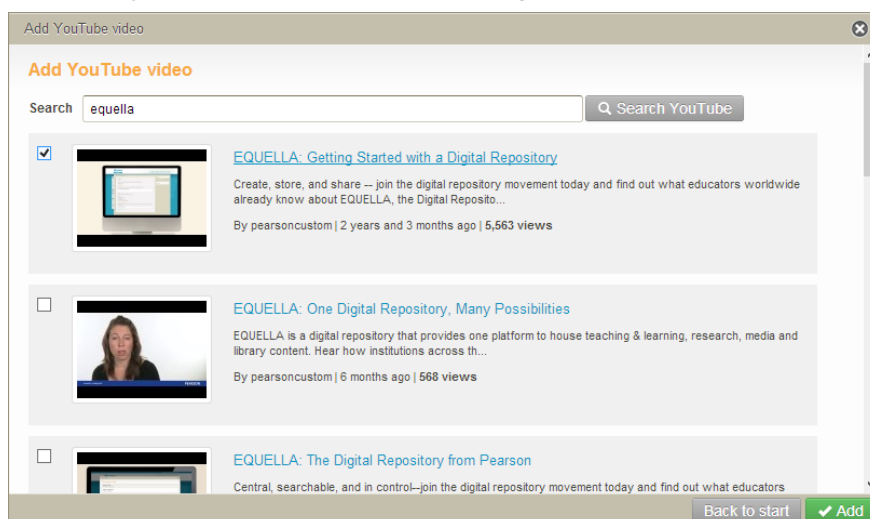
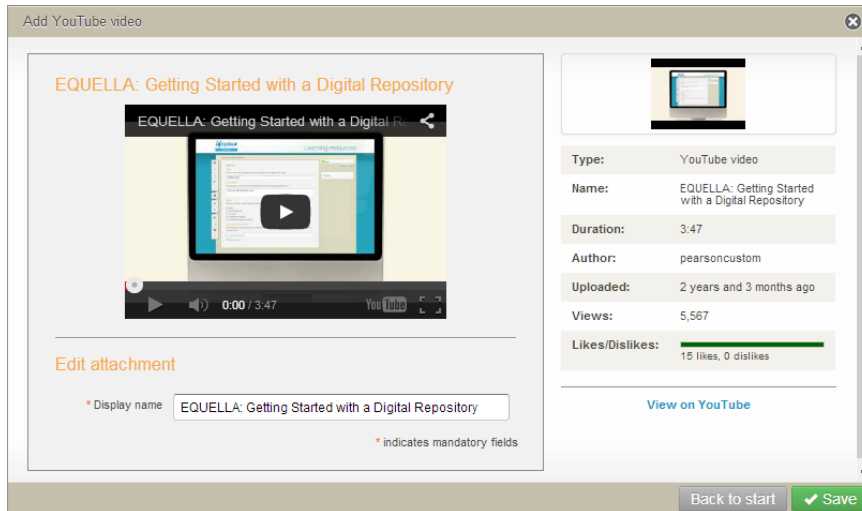


Figure 128 Add YouTube search results

3. Select the required videos then click ✔ Add. If multiple selections are made, the contribution wizard page displays with the selected attachments listed. They can be edited or deleted from the list. See [Edit attachments](#) on page 94 for more information.

If only one YouTube link has been selected, the **Edit YouTube details** page displays. An example is shown in Figure 129.



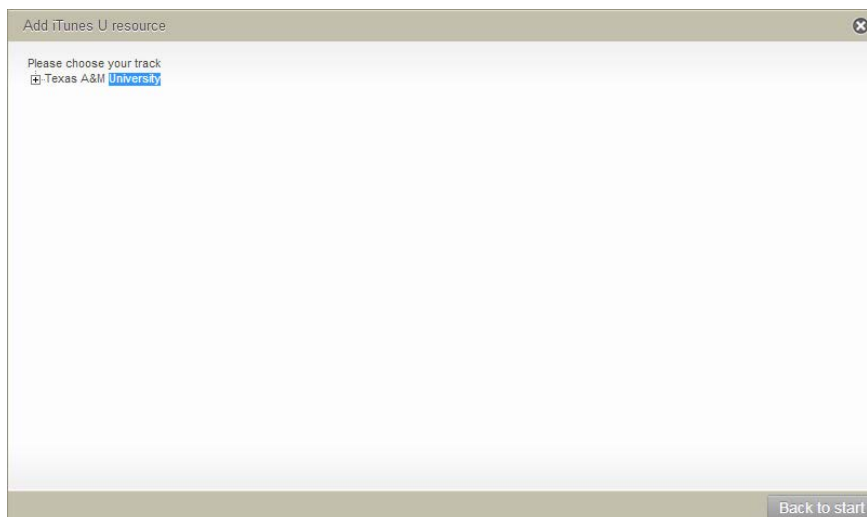
**Figure 129 Edit YouTube details page**

4. Click the **View on YouTube** link to open YouTube and view the resource.
5. Edit the **Display name** if required, then click **Save**. The contribution wizard page displays with the YouTube video link listed.

## iTunes U

### To add an iTunes U link

1. Select **iTunes U** then click **Next** to add an iTunes U link. The **Add iTunes U resource** page displays. An example is shown in Figure 130.



**Figure 130 Add iTunes U resource dialog**

2. Click the **+** to open the tree to locate the relevant resources. Each resource has an **+ Add** button beside it. An example is shown in Figure 131.



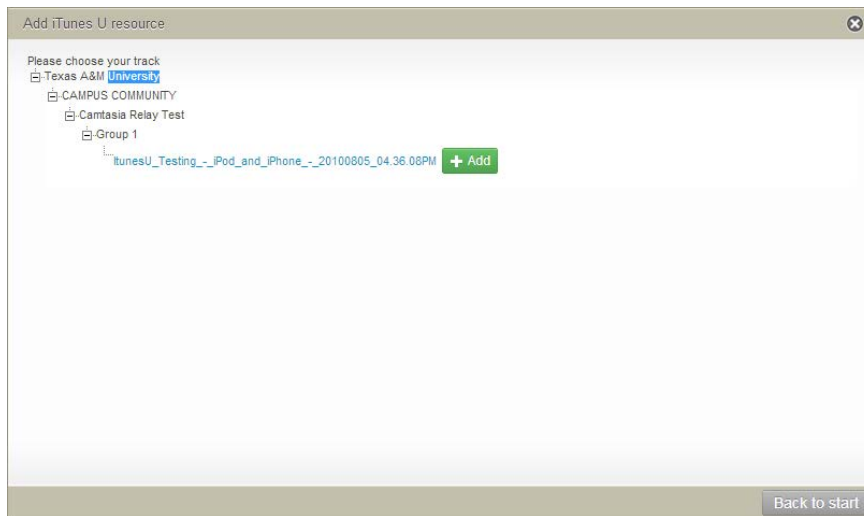


Figure 131 iTunes U resource list

- Click **+ Add** to add the selected iTunes U resource to the contribution wizard page. The Edit iTunes U details page displays. An example is shown in Figure 132.



Figure 132 iTunes U details page

- Click on the **Listen to this track** link to listen to the resource with iTunes.
- Edit the **Display name** if required, then click **Save**. The contribution wizard page displays with the iTunes U link listed.

## Flickr

### To add a Flickr link

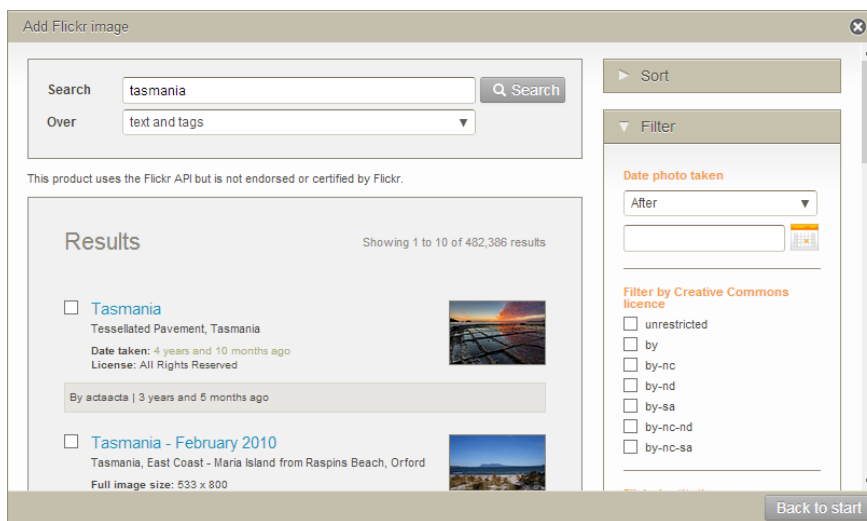
- Select **Flickr** then click **Next** to add a Flickr image link. The **Add Flickr image** page displays. An example is shown in Figure 133.

**Figure 133 Add Flickr image dialog**

Elements of the Add Flickr image page include:

- **Search**—enter search criteria (e.g. *Tasmania*)
- **Over**—
  - **Text and tags**—perform a free text search, matching values in a photo's title, description or tags.
  - **Any tags**—search tags for ANY match of search criteria terms (OR combination).
  - **All tags**—search tags for match of ALL search criteria terms (AND combination).
- **Sort**—results can be sorted by
  - Relevance
  - Interestingness—this is a Flickr term translating to 'level of interest'
  - Date taken
  - Date posted
  - Check the check box to reverse the order of the results
- **Filter**—results can be filtered by
  - Date photo taken
  - Creative Commons licences
  - Flickr Institutions
  - Flickr user's FlickrId, username or email.

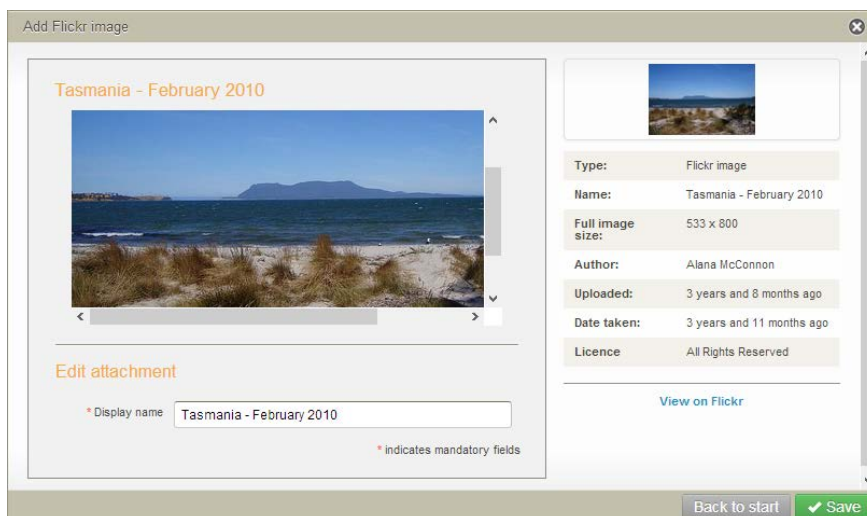
An example of the search results page, using the search term '*Tasmania*', is shown in Figure 134.



**Figure 134 Flickr results page**


The results page elements can include:

- Name
  - Selection check box
  - Description
  - Full image size
  - Date taken
  - License
  - Author
  - Time since added.
2. Select the required Flickr images then click **+ Add**. If multiple selections are made, the contribution wizard page displays with the selected attachments listed. If only one image has been selected, the **Edit Flickr details** page displays. An example is shown in Figure 135.




**Figure 135 Edit Flickr details page**

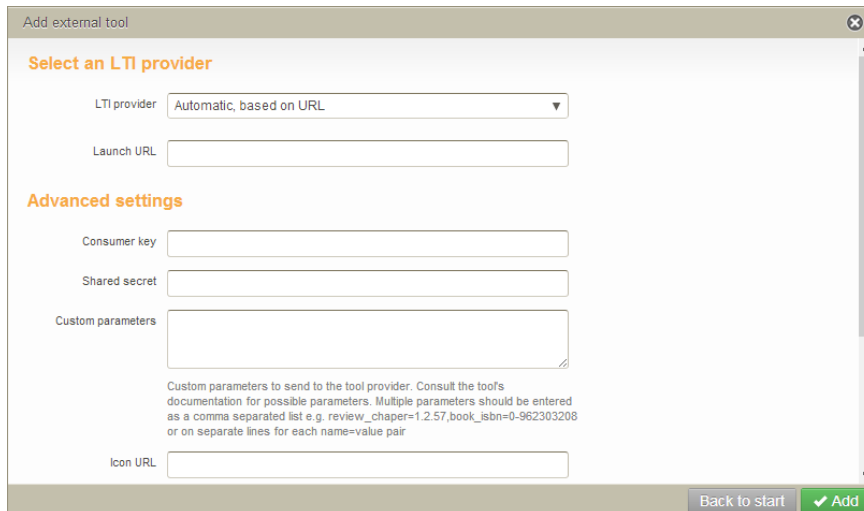
3. Click on the **View on Flickr** link to open the image in Flickr.

4. Edit the **Display name** if required, then click . The contribution wizard page displays with the Flickr image link listed.

## External tool provider (LTI)

To add an LTI provider link

1. Select **External tool provider (LTI)** then click  to add an LTI provider link. The **Add external tool** page displays. An example is shown in Figure 136.



**Figure 136 Add external tool dialog**

*NOTE: EQUELLA has a setting (External Tool Providers (LTI)) which allows administrators to configure Base URL information for LTI Tool Providers that provide one or more tools. If the core information for these providers is pre-configured, the user only needs to select the LTI provider from the list and enter the Launch URL during contribution. The rest of the information will default from the pre-configured record. See the EQUELLA LTI Provider Configuration Guide for further information.*

2. From the **LTI provider** drop-down, select either a pre-defined tool provider if the required tool provider displays in the list, otherwise leave as Automatic, based on URL.

*NOTE: If a pre-configured LTI provider has been selected, any information added in the **Advanced settings** fields will override the preset configuration, except Custom parameters, which will add to current custom parameters configured through Settings, rather than overriding them.*

3. Enter the LTI tool **Launch URL** (e.g. [https://www.edupaths.org/tool\\_redirect?id=quizlet](https://www.edupaths.org/tool_redirect?id=quizlet)). An example is shown in Figure 137.

**Figure 137 LTI tool example**


4. For new LTI provider tools, enter the **Consumer key**, **Shared secret** and any **Custom parameters**, if required. These would be provided to you by the external LTI tool.

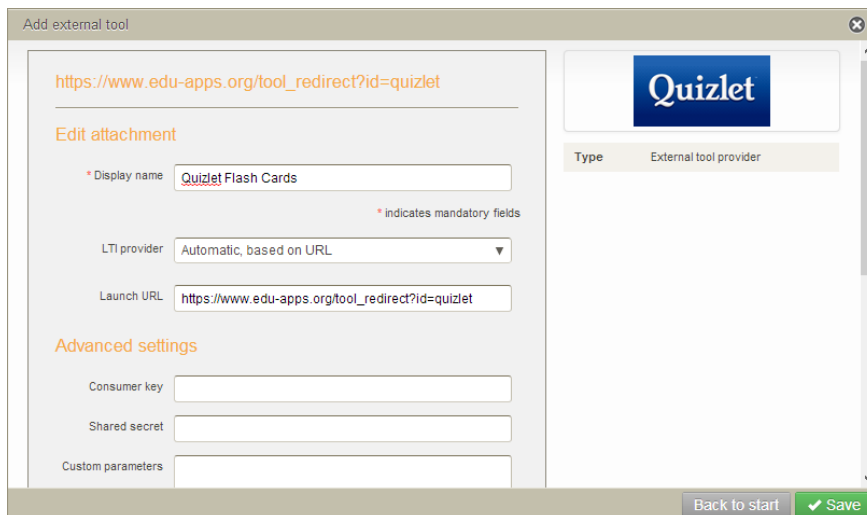
*NOTE: If multiple custom parameters are required, separate each parameter with a comma.*

5. For new LTI provider tools, enter the **Icon URL**. This is the icon that will show on the results page for the LTI tool. Note that if a pre-configured tool has been selected, adding an Icon URL will override any Icon information stored as part of the pre-configuration.
6. For new LTI provider tools, uncheck the **Use default privacy options** checkbox to enable the **Share launcher's name** and **Share launcher's email** checkboxes, then select the option/s required:
  - **Share launcher's name** – if enabled, the full name of the user launching the tool will be shared with the tool provider
  - **Share launcher's email** – if enabled, the email address of the user launching the tool will be shared with the tool provider.


An example is shown in Figure 138.

**Figure 138 LTI Tool privacy options**

7. Click . The **Edit attachment** dialog displays as shown in Figure 139.

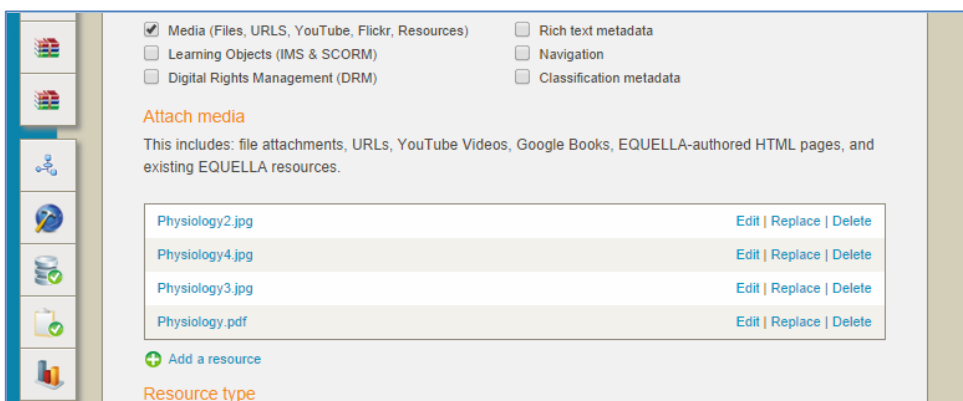


**Figure 139 Edit attachment dialog**

8. Edit the **Display name**, if required.
9. Click . The contribution wizard page displays with the LTI tool link listed.

## Edit attachments

Once all required attachments have been added to the current contribution, they are listed on the contribution wizard page. An example is shown in Figure 140.



**Figure 140 Attachments list**

File options are:

- **Edit**—opens a page displaying file metadata and file editing options. Note that this page displays automatically when only a single file has been uploaded. The following options may display:
  - The **Display name** can be changed.
  - Select the **Restrict** checkbox to allow the attachment to display to only users with the `VIEW_RESTRICTED_ATTACHMENTS` permission. Note that only users with the `RESTRICT_ATTACHMENT` permission will have access to the **Restrict** checkbox.

- **Edit file with default editor**—opens the default editor for that file type (e.g. *Word*).
- **Edit file with another editor**—lists all editors available for that file type (e.g. *Word*, *Wordpad* etc.).
- **No thumbnails** – select this checkbox to prevent thumbnails from being generated for this file. For example, a user may not require thumbnails to be generated for a *RAW* file, as they may also upload a *png* version of the same file. This checkbox may not display depending on the configuration at your institution.
- **Download this file**—downloads the file to the local drive.

An example of the Edit attachment page is shown in Figure 26.

**Figure 141 Edit attachment page**

Once a file is edited and saved using an editor (e.g. *Word*), the [Upload changes](#) and [Ignore changes](#) buttons display. Select [Upload changes](#) to implement the changes in the attachment.

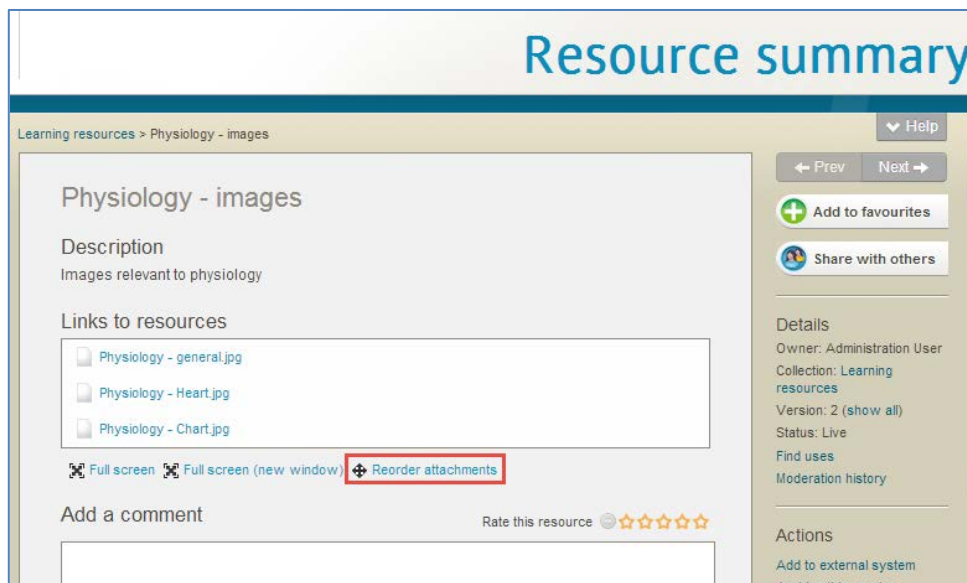
- **Replace**—opens the Pick resource type page (shown in Figure 19). Another file can be selected, and the option to Replace the current file or Add the new one is offered.
- **Delete**—removes file after confirmation.

## Reorder attachments

Once a resource has been saved, users who have the permission to edit resources have access to the **Reorder attachments** link under the **Links to resources** box on the Resource summary page, when there are two or more attachments uploaded. Clicking this link start the *reorder session*, where direction arrows or drag and drop can be used to change the order of the attachments in the list.

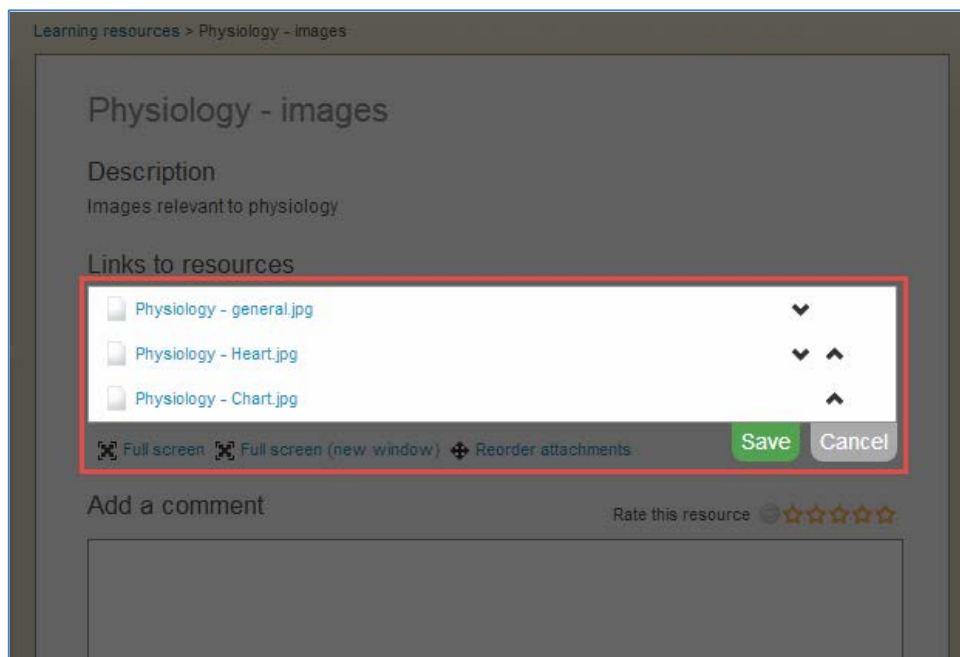
### To reorder attachments

1. From the Resource summary page, click the **Reorder attachment** link below the **Links to resources** box. An example is shown in Figure 142.



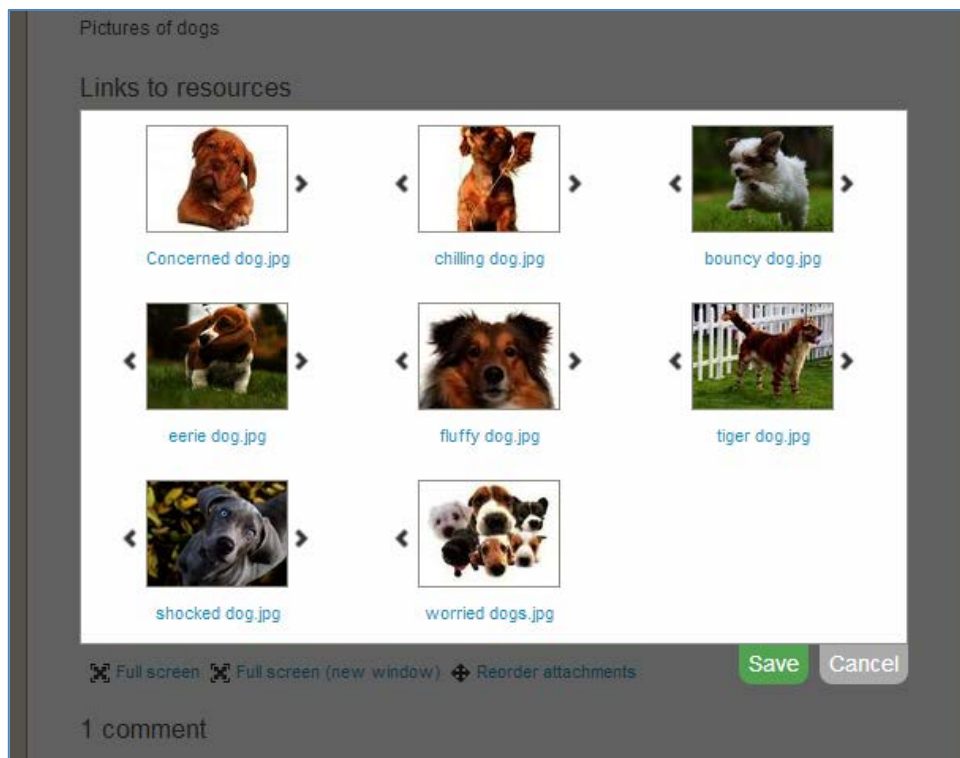
**Figure 142 Reorder attachments link**

The **Reorder session** opens. An example where the structured (list) view is selected for the collection is shown in Figure 143 and an example where the thumbnail grid view is selected for the collection is shown in Figure 144.



**Figure 143 Reorder session (structured view)**





**Figure 144 Reorder session (thumbnail grid view)**

2. Change the order of the attachments in the list by clicking the direction arrows, or dragging and dropping files into the desired position.
3. Click **Save** to save the changes and close the reorder session.

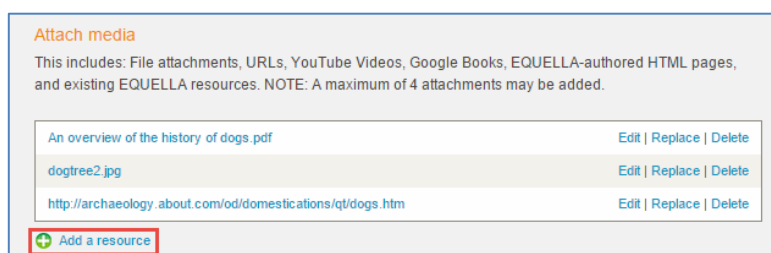
## *Attachment restrictions and warnings*

When administrators configure contribution wizards, they may choose to restrict the number of attachments that can be selected, the maximum file size that can be uploaded or the type of file that can be uploaded during contribution.

A relevant warning message is displayed in these instances. Some examples are shown below:

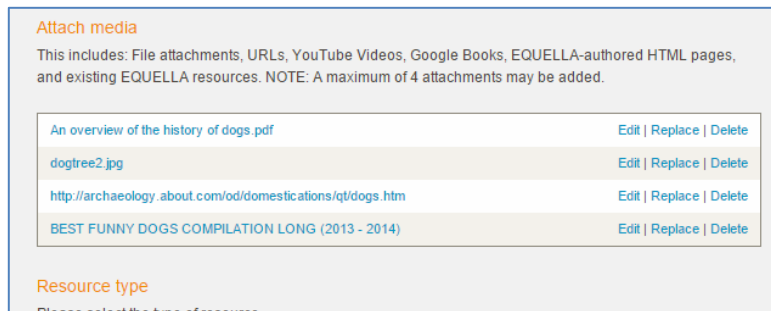
### **Number of attachments exceeds maximum number allowed**

Typically, an **Add a resource** link shows at the bottom of an attachment control during contribution. An example is shown in Figure 145.



**Figure 145 Attachment control in contribution wizard with Add a resource link**

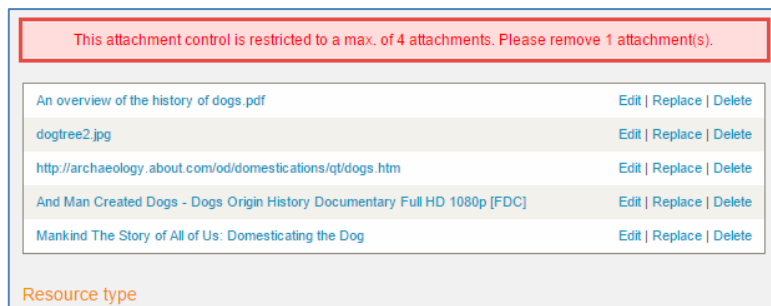
If a maximum number of attachments has been set for an attachment control, and the maximum has been reached, the **Add a resource** link won't display. An example is shown in Figure 146.



**Figure 146 Attachment control with a maximum number of attachments restriction - no Add a resource link**

In this case, if one or more attachments are deleted, the **Add a resource** link will display.

If multiple attachments are added in one process (e.g. file drag and drop, multiple YouTube videos selected etc.), a message displays to inform the user that the limit has been breached. An example is shown in Figure 147.



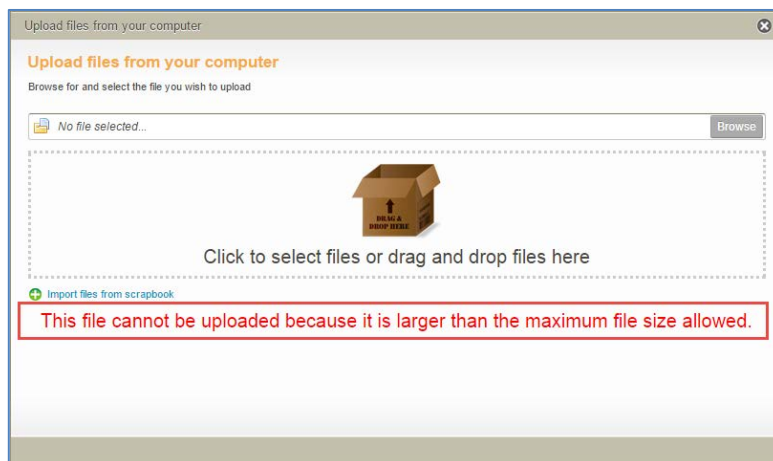
**Figure 147 No. of attachments restriction breach message**

The resource cannot be successfully saved until the number of attachments is equal to or less than the restriction maximum.

## File upload size larger than restriction

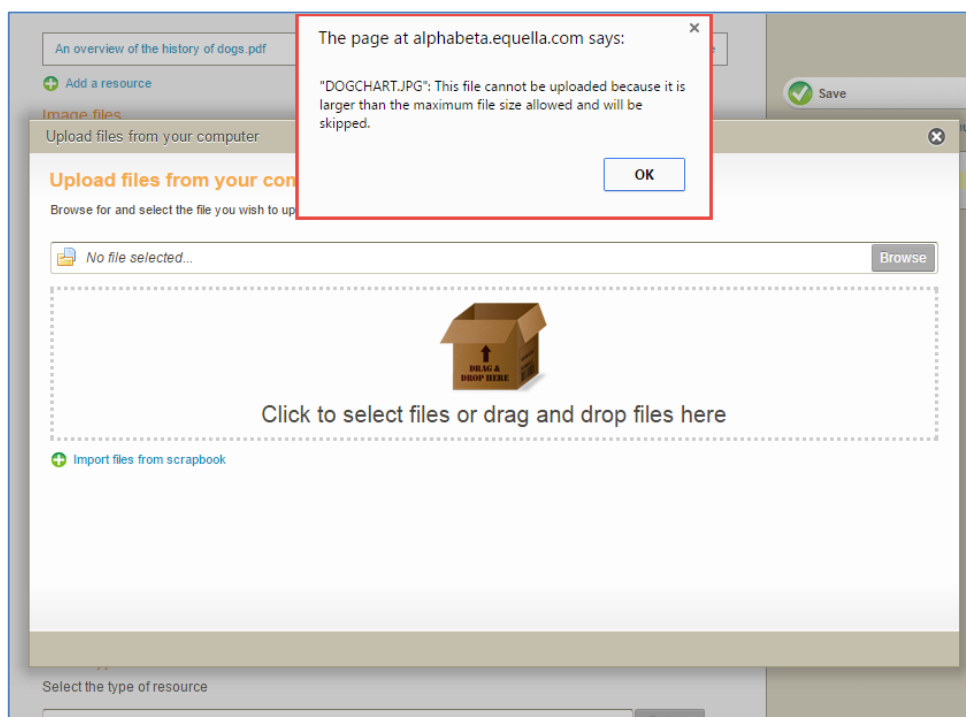
Administrators may restrict the upload file size for files being uploaded during contribution.

If a maximum file size restriction has been set for a contribution wizard attachment control, and a contributor tries to upload a file larger than the restriction size during contribution, a message displays to inform the contributor. An example is shown in Figure 148.



**Figure 148 File size restriction message**

If a number of files are uploaded using the drag and drop function, and one or more breach the maximum size allowed, a message displays for each offending file to inform the contributor of the breach, and that the file will be skipped from the upload. An example is shown in Figure 149.

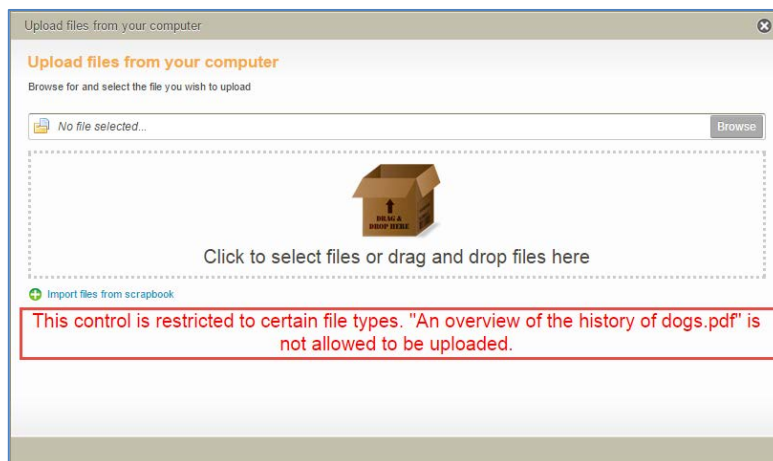


**Figure 149 File size restriction message for drag and drop function**

## File type not allowed

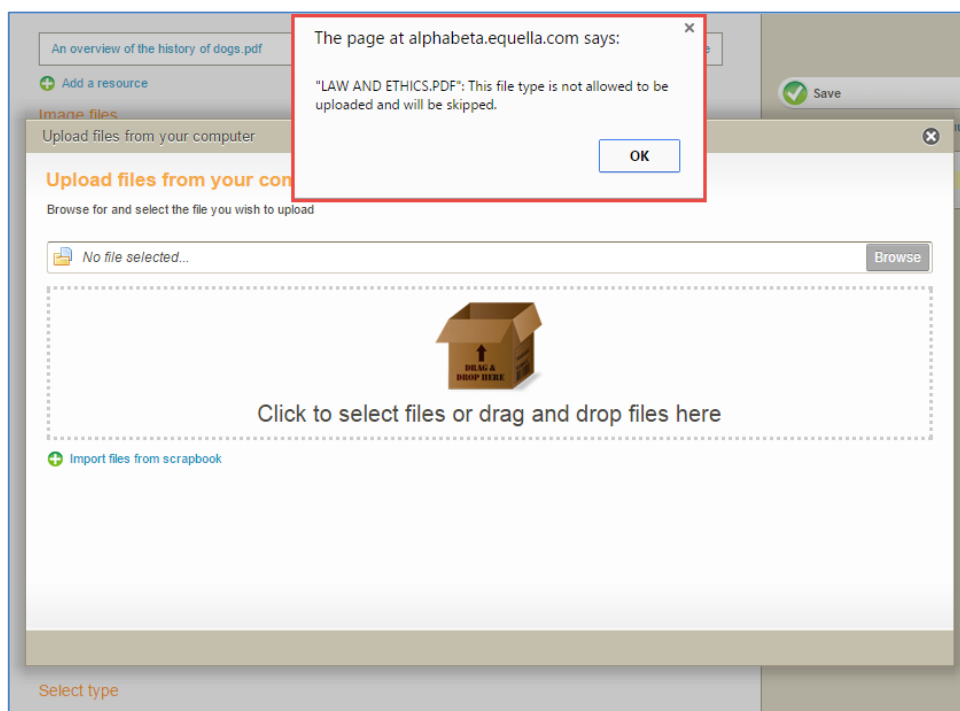
Administrators may restrict the types of files (by MIME types) that are allowed to be uploaded for an attachment control (e.g. restrict to image file types).

If a MIME type restriction is in place, and a contributor tries to upload files of other types during contribution, a message displays to inform the contributor. An example is shown in Figure 150.



**Figure 150 MIME type restriction message**

If a number of files are uploaded using the drag and drop function, and one or more breach the file types allowed, a message displays for each offending file to inform the contributor of the breach, and that the file will be skipped from the upload. An example is shown in Figure 151.




**Figure 151 File type restriction message for drag and drop function**

## Calendar

The **Calendar** control allows the selection of a date or date range, for example to select a publication, creation or modification date, or to control resource use or availability. An example is shown in Figure 152.

**Figure 152 Calendar Control**

Click the **Date** field or  to display a date selector, as shown in Figure 153.

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**Figure 153 Date selector**

Select a date to populate the **Date** field with the selected date, as shown in Figure 154.

**Figure 154 Date field populated with selected date**

The year drop down list ranges from 50 years prior to 10 years from the current year.

Calendar controls may be configured to require only the month and year or only the year in addition to the full date. An example of each is shown in Figure 155.

The image shows two separate calendar selection interfaces. The top one, titled 'Date', has a 'Select date' label and a date picker showing 'Nov' and '2013'. Below it are 'Today' and 'Done' buttons. The bottom one, titled 'Year', has a 'Select the valid year' label and a year picker showing '2013'. It also has 'Today' and 'Done' buttons.

**Figure 155 Calendar controls, one with month and year and one with only year**

Calendar controls can also be configured to enter a date range. An example is shown in Figure 156.

The image shows a 'Valid date range' control. It has a label 'Enter range' and two date input fields. The first field is labeled 'From' and contains '15/12/2013'. The second field is labeled 'to' and contains '15/12/2014'. There are calendar icons next to each field and a 'Clear' button on the right.

**Figure 156 Calendar control with date range**

## Check box group

A **Check box group** provides a number of options where one or more elements can be selected by checking the boxes provided. An example of two check box groups is shown in Figure 157.

The image shows two check box groups. The first group, titled 'Media', has the instruction 'Please select the media to attach to your item' and five options: 'Media', 'Rich text metadata', 'Navigation', 'Classification metadata', and 'Digital Rights Management (DRM)'. The second group, titled 'Resource Purpose', has the instruction 'Please select the type of resource' and four options: 'General Knowledge', 'Required Reading', 'Exam Preparation', and 'Assignment Related'.

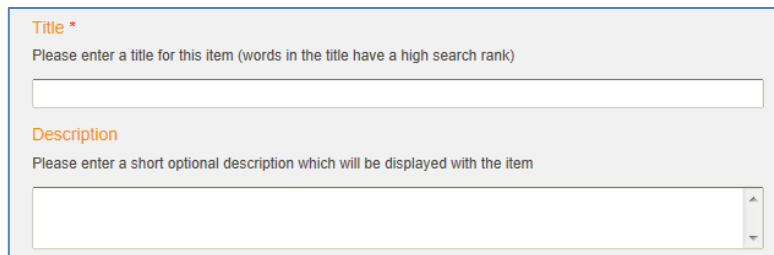
**Figure 157 Check box groups**

Check box selections can enable other controls to be displayed, depending on how the contribution wizard is configured.

Selected check boxes can be unchecked by clicking on them. Check boxes may also be pre-checked by default.

## Edit box

The **Edit box** allows the entry of basic text such as names, descriptions, tags, keywords, comments etc. An example of two edit boxes is shown in Figure 158.

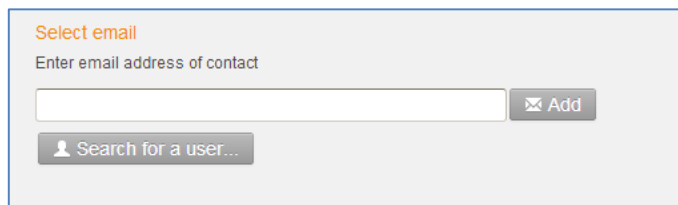


**Figure 158** Edit boxes

The Description edit box has inactivated scroll arrows. These arrows become functional if the amount of text entered is larger than the size of the edit box.



## Email selector

The **Email selector** allows the entry of one or multiple email addresses (depending on its configuration). An example is shown in Figure 159.



**Figure 159** Email selector


### To select emails

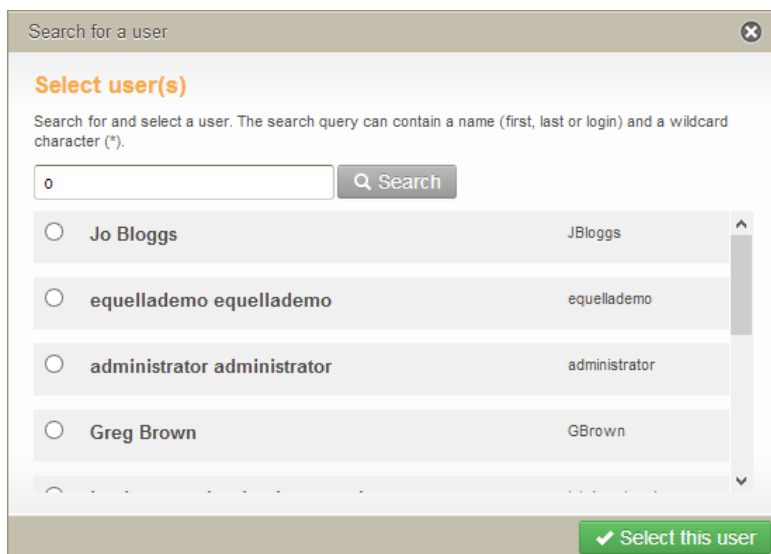
1. Either type the email address in the edit box then click , or click  to open the **Search for users** page, as shown in Figure 160.



A dialog box titled "Search for a user" with a close button (X) in the top right corner. Below the title is the heading "Select user(s)". A sub-header reads: "Search for and select a user. The search query can contain a name (first, last or login) and a wildcard character (\*)." Below this is a search input field containing the placeholder text "Search for a user..." and a "Search" button with a magnifying glass icon. At the bottom right of the dialog is a green button with a checkmark and the text "Select this user".

**Figure 160 Search for users page**

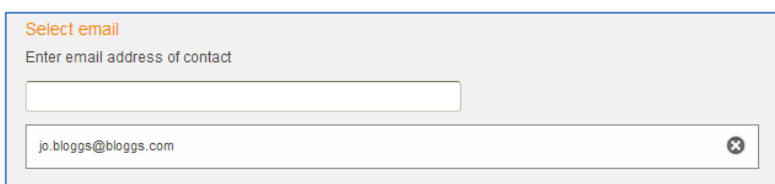
2. Enter search criteria then click . The search results display with a radio button (where only a single user can be selected) or check box (where multiple users can be selected) beside each name. An example where only a single user can be selected is shown in Figure 161.



A dialog box titled "Search for a user" with a close button (X) in the top right corner. Below the title is the heading "Select user(s)". A sub-header reads: "Search for and select a user. The search query can contain a name (first, last or login) and a wildcard character (\*)." Below this is a search input field containing the text "o" and a "Search" button with a magnifying glass icon. Below the search bar is a list of search results, each with a radio button on the left and the user's name and login on the right. The results are: "Jo Bloggs" with login "JBloggs", "equellademo equellademo" with login "equellademo", "administrator administrator" with login "administrator", and "Greg Brown" with login "GBrown". At the bottom right of the dialog is a green button with a checkmark and the text "Select this user".

**Figure 161 Search results page**


3. Select the required name/s then click . The email address/es display in a list. An example is shown in Figure 162.



A dialog box titled "Select email" with a sub-header "Enter email address of contact". Below this is a text input field. Below the input field is a list of email addresses, with "jo.bloggs@bloggs.com" selected. A close button (X) is in the top right corner of the list area.

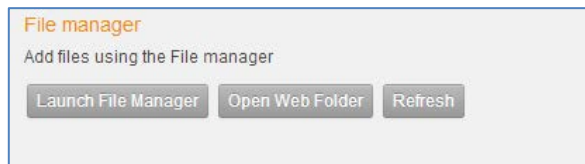
**Figure 162 Email list**



Click  to remove an email address.

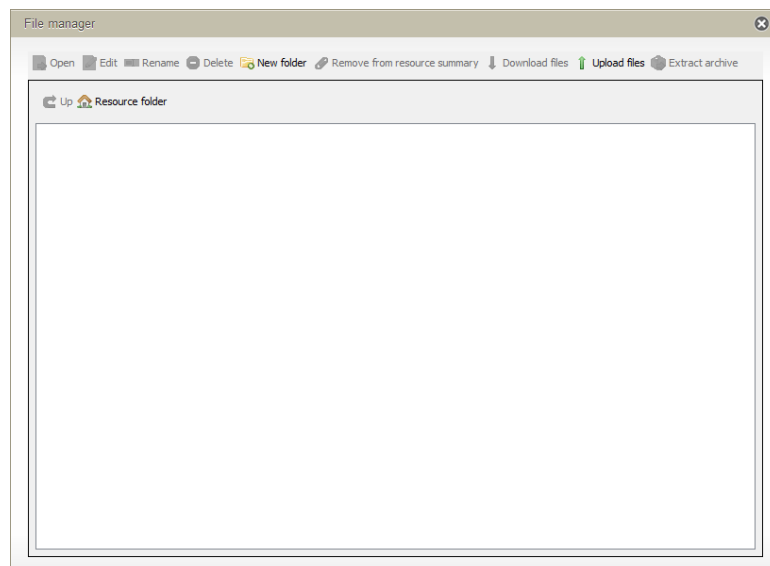
## File manager

The **File Manager** is used for uploading, downloading and managing contributed files. The File Manager control appears as a button in the contribution wizard, as shown in Figure 163.



**Figure 163 File Manager control**

Click  to display the **File Manager** page, as shown in Figure 164.



**Figure 164 File Manager page**

To add files to the File Manager, there are two options:


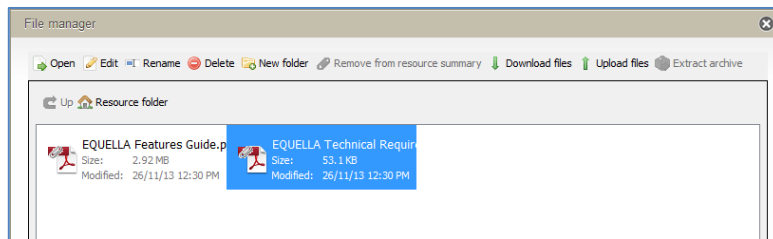
- **Drag-and-drop**—locate files or folders in the local computer or network, then drag and drop them into the File Manager, or
- **Upload Files**—click the **Upload Files**  button to browse for files in the local computer or network.

Figure 165 shows an example of files added to the File Manager.

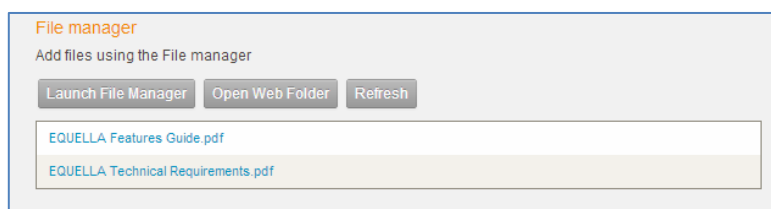


**Figure 165 File Manager with uploaded files**

Select a file to enable the File Manager buttons. (*Note: The **Extract Archive** button is only enabled if the selected file is an archive file.*)

The File Manager provides the following file management options:

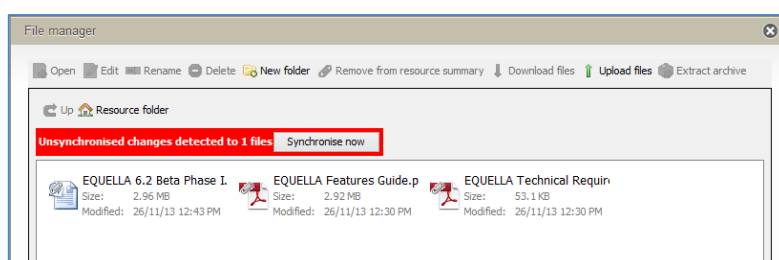
- **Open** —opens the currently selected folder or file for viewing or editing.
- **Edit** —opens the currently selected file for editing. Files can be edited directly using native tools such as MS Word™. When changes are made the files must be synchronised to update the stored files. See [Synchronise files](#) on page 107 for more information.
- **Rename** —renames the currently selected file or folder.
- **Delete** —deletes the currently selected file or folder (a confirmation dialog appears on selection of this option).
- **New Folder** —creates a new folder.
- **Show in Item Summary/Remove from Item Summary** —shows or removes the selected files from the resource summary page. The paper clip symbol shows on attachments that will display on the resource summary page. (See Figure 165.)
- **Download Files** —downloads the selected files or folders to the local computer or network.
- **Upload Files** —uploads files or folders from the local computer or network.
- **Extract Archive** —extracts files from an archive (an example archive file type is .zip)
- **Up** —returns to a higher level folder.
- **Home** —returns to the top folder level.
- **Item Folder** —displays the current folder. No folder is shown at the top folder level.
- **Close** —click the button when all necessary files have been uploaded or edited.
- Uploaded items that have been selected to Show in Item Summary display in a list under the **LAUNCH FILE MANAGER** button on the contribution wizard page. An example is shown in Figure 166.



**Figure 166 File Manager displaying currently selected files**

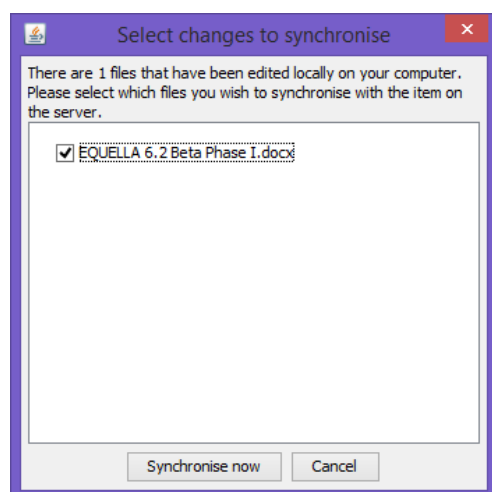
## Synchronise files

If a file uploaded using the File Manager has been edited, an '*Unsynchronised changes detected to X files*' message is displayed with a **Synchronise Now** button. An example is shown in Figure 167.




**Figure 167 File Manager displaying unsynchronised changes message**

Click the **Synchronise Now** button to display a **Select Changes to Synchronise** dialog, listing the files that have been changed. An example is shown in Figure 168.



**Figure 168 Select Changes to Synchronise dialog**

Check the check boxes corresponding to the files to be synchronised, and click the **Synchronise Now** button to align the files.

When a resource is contributed the files selected and marked with  are listed as attachments on the resource summary page. An example is shown in Figure 169.

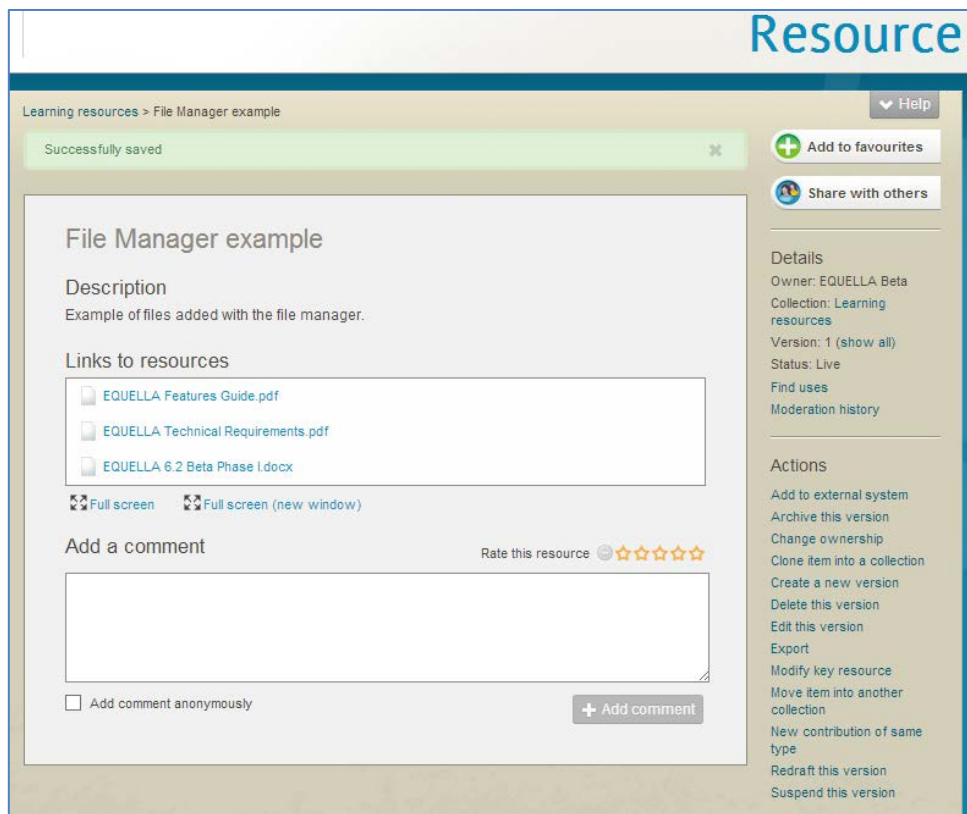


Figure 169 Resource with attachments added via File Manager

## HTML edit box

The **HTML edit box** control provides an inline HTML Editor in the contribution wizard that allows users to create HTML content during contribution which will be saved as part of the resource metadata. An example is shown in Figure 170.

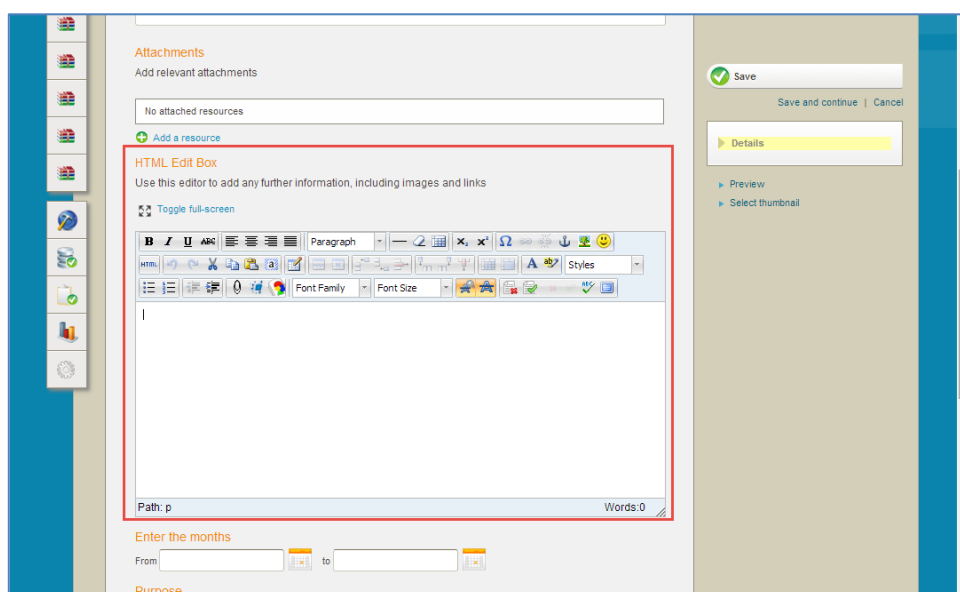


Figure 170 HTML Edit Box control

The HTML Editor can be displayed automatically, as shown in Figure 170, or 'on demand', where the editor defaults to read only and a link is selected to open the editor, as shown in Figure 171.

**About**

**Title \***  
Please enter a title for this item (words in the title have a high search rank)

**Description**  
Please enter a short optional description which will be displayed with the item

**Media**  
Please select the media to attach to your item

☐ Media (Files, URLs, YouTube, Flickr, Resources)
 ☐ Rich text metadata  
☐ Learning Objects (IMS & SCORM)
 ☐ Navigation  
☐ Digital Rights Management (DRM)
 ☐ Classification metadata

**Add HTML**  
[\[Click here to edit\]](#)

**Figure 171 HTML editor (on demand)**

Select the **[Click here to edit]** link to enable the HTML Editor.

Select the **Toggle full-screen** link to open editor in a full screen.

Create or edit content as needed then select the **[Click here to lock]** link to store any updated content and disable the Editor. The content is displayed as part of the resource metadata. An example where an image has been added is shown in Figure 172.

Learning resources > HTML Editor

Successfully saved

**HTML Editor**

**Description**  
Example of the HTML editor image

**Rich text**

**EQUELLA**  
Revolutionising the way institutions search, manage and create content online.

**Digital Repository**

Add a comment

Rate this resource

☐ Add comment anonymously

**Details**  
 Owner: EQUELLA Beta  
 Collection: Learning resources  
 Version: 1 (show all)  
 Status: Live  
 Find uses  
 Moderation history

**Actions**  
 Add to external system  
 Archive this version  
 Change ownership  
 Clone item into a collection  
 Create a new version  
 Delete this version  
 Edit this version  
 Export  
 Modify key resource  
 Move item into another collection  
 New contribution of same type  
 Redraft this version  
 Suspend this version

**Figure 172 Resource with HTML content**

The HTML Editor operations can include:

- Resizing of the editor pane
- Underline
- Align Left
- Align Right
- Styles
- Insert Horizontal Ruler
- Toggle guidelines/Invisible elements
- Superscript
- Toggle full screen mode
- EQUELLA Resource Linker
- Font Family
- Cut
- Paste
- Ordered List
- Indent
- Redo
- Unlink
- Insert/edit image
- Edit HTML source
- Table row properties
- Insert row before
- Delete row
- Insert column after
- Split merged table cells
- Select all
- Select background colour
- Bold, Italic
- Strikethrough
- Align Centre
- Align Full
- Paragraph formatting
- Remove formatting
- Subscript
- Insert custom character
- EQUELLA Resource Embedder
- EQUELLA File Uploader
- Font Size
- Copy
- Unordered List
- Unindent
- Undo
- Insert/edit link
- Insert/edit Anchor
- Clean up messy code
- Inserts a new table
- Table cell properties
- Insert row after
- Insert column before
- Remove column
- Merge table cells
- Select text colour

Further information is provided in the *EQUELLA HTML Editor User Guide*.

## List box

The **List Box** control provides a drop-down list of selectable options. Some examples are shown in Figure 173.

**Aggregation level**  
At what level is the most complex resource in this item

Please select one ▼

Please select one

Level 1 - Smallest level of aggregation, e.g. raw media data or fragments

Level 2 - Collection of level 1 resources, e.g. an HTML document with some embedded pictures or a lesson

Level 3 - Collection of level 2 resources, e.g. a 'web' of HTML documents, with an index page or a unit

**EQUELLA version**  
Which version of EQUELLA is this documentation accurate/valid for?

Please select one ▼

Please select one

5.2

5.1

5.0

6.0

6.1

6.2

**Figure 173 List boxes**

Click anywhere in the **Please select one** edit box or on the down arrow to display a drop-down list of options, then select the relevant value. The selection may cause other controls related to the selection to be displayed.

## Radio button group

The **Radio button group** control displays a group of options where only one can be selected. Two examples are shown in Figure 174.

**Type of resource**  
Select the relevant type

☐ General reading

☐ Exam preparation

☐ Compulsory tutorial

☐ Required reading

**Does this item require moderation?**

☒ Yes it requires moderation

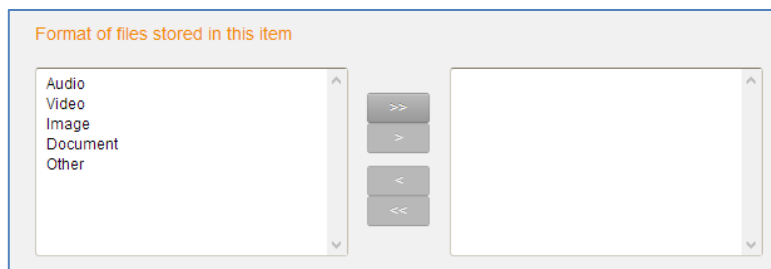
☐ No it can be immediately published to the repository

**Figure 174 Radio button group control examples**

Radio button selections can enable other controls to be displayed, depending on how the contribution wizard is configured. Radio buttons may be pre-selected by default.

## Shuffle box

The **Shuffle box** control allows users to select one or more values by moving them from one pane to another using the arrow buttons. An example is shown in Figure 175.

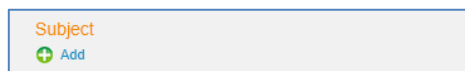


**Figure 175 Shuffle box**

Select a value from the left-hand pane and move it to the right-hand pane by clicking the **>** button, or move all values using the **>>** button. Use the **<** and **<<** buttons to remove elements from the right-hand pane.

## Shuffle group

The **Shuffle Group** control allows users to add and delete groups of details in a list (e.g. *course and subject details*). It can include **Edit Box** and **List Box** controls. An example before values have been added is shown in Figure 176.



**Figure 176 Shuffle Group control**

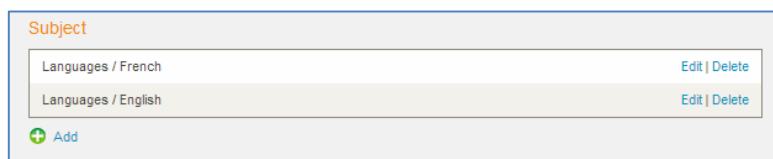
Select the **Add** link to add a value. An example is shown in Figure 177.

**Figure 177 Shuffle group Enter details page**

Enter relevant data in Edit Box fields, select options from the List Box drop-down list then click **OK** to populate the list box with the information. Values are separated by a forward



slash (e.g. *Course / Subject /*). Multiple groups of information can be added. An example is shown in Figure 178.



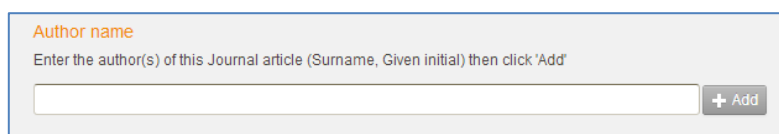
**Figure 178 Shuffle group list box**

Select the **Edit** link to edit a value in the list.


Select the **Delete** link to remove a value from the list.

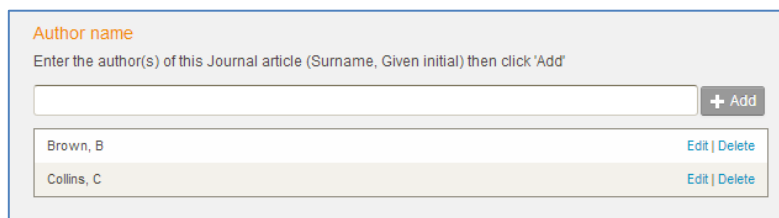
## Shuffle list

The **Shuffle list** control allows users to add any number of values to a list (for example, a list of multiple authors relating to a single document). An example is shown in Figure 179.



**Figure 179 Shuffle list control**

Enter details in the top field, then click  to move it to the list box below. An example is shown in Figure 180.



**Figure 180 Shuffle List control with information entered**

Select the **Edit** link to edit a value in the list.

Select the **Delete** link to remove a value from the list.

## Term selector

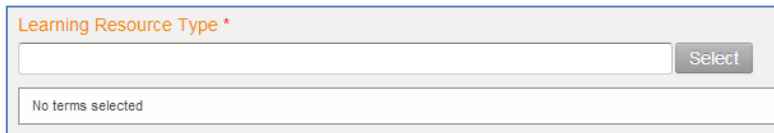
The Term Selector control allows selection of one or more terms from an associated taxonomy. It can be displayed in the following ways:

- **Auto-complete edit box**—partially entered terms are used to search the taxonomy for matching terms.
- **Detailed Pop-up browser**—users can search, browse or both (depending on configuration) the taxonomy, view the term details and select suitable terms.

- **Wide Pop-up browser** - users can search, browse or both (depending on configuration) the taxonomy, view terms on a wide screen (for very long taxonomy terms) and select suitable terms.

## Auto-complete edit box

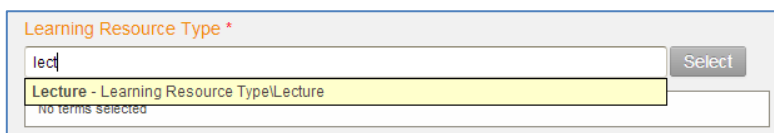
When a term selector is configured as an auto-complete edit box, the control is displayed with an edit box that automatically completes the entered term. An example is shown in Figure 181.



**Figure 181** Term selector with auto-complete edit box

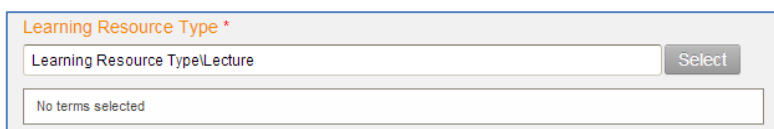
### To use the auto-complete edit box

1. Start typing a term in the edit box (e.g. *lect*). A list of matching terms displays as a drop-down list. An example is shown in Figure 182.



**Figure 182** List of matching terms

2. Select the required term to display the term path in the edit box. An example is shown in Figure 183.




**Figure 183** Selected term displayed in edit box

3. Click **Select**. The selected term displays in a list box under the term selector edit box, as shown in Figure 184.



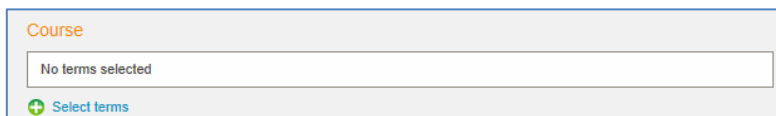
**Figure 184** Currently selected terms list

Multiple terms may be added.

Click  to remove a value from the list.

## Detailed Pop-up browser

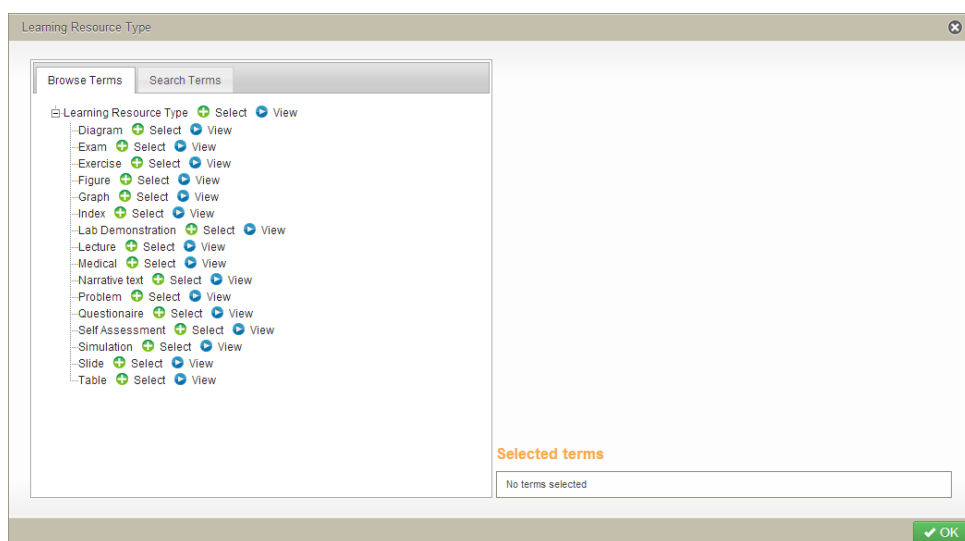
When a term selector is configured with a Detailed Pop-up browser, a new page opens to select the required terms. An example of a term selector control is shown in Figure 185.



**Figure 185** Term selector with pop-up browser


### To use the Detailed Pop-up browser

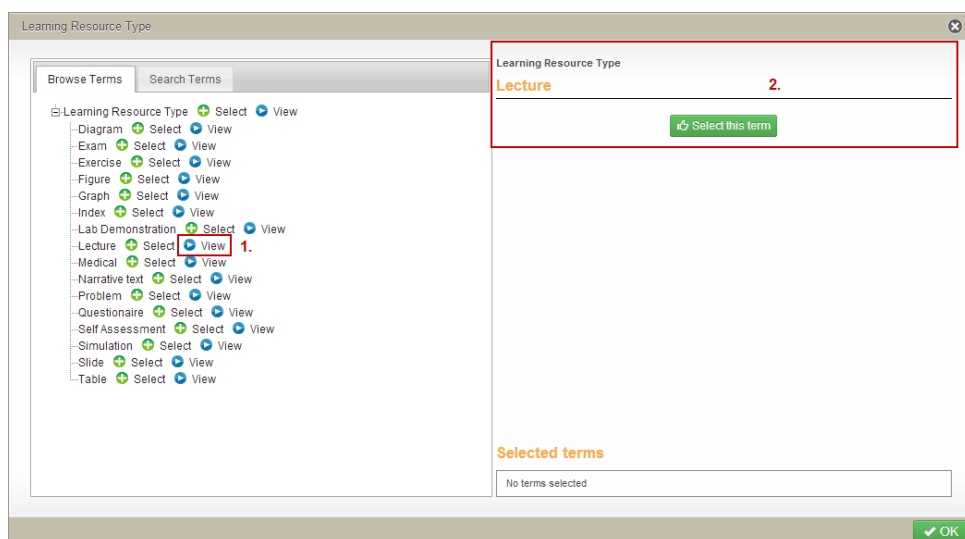
1. Click the **Select terms** link to open the browser. An example is shown in Figure 186.




**Figure 186** Term selector with Detailed Pop-up browser

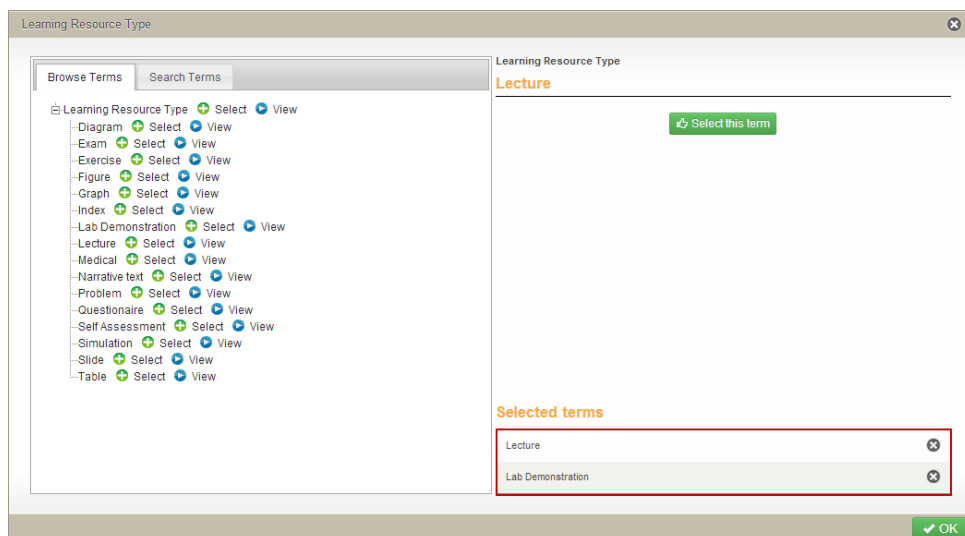
(NOTE: For information on how to use the **Search Terms** tab, see [Search Terms page](#) on page 119.)

2. Click  to expand the term tree. Each term has a **Select** and **View** link. Click the **View** link to display the term details in the right hand pane. An example is show in Figure 187.





**Figure 187 Select term**

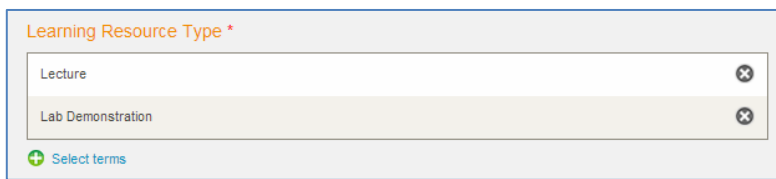
3. To select a term, either click the **Select** link from the left hand pane or click  from the right hand pane. The term is listed in the **Selected terms** list at the bottom of the right hand pane, as shown in Figure 188.



**Figure 188 Selected terms**

Multiple terms can be selected, depending on how the term selector has been configured. Terms can be removed from the *Selected terms* list by clicking .

4. Once all required terms have been selected, click . The terms selected now display in the term selector list on the contribution wizard page. An example is shown in Figure 189.

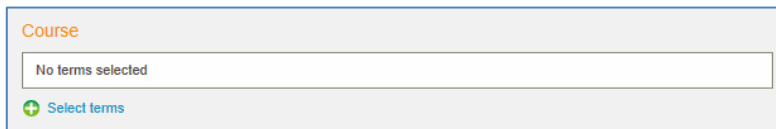


**Figure 189** Term selector list

Click  to remove a term from the list or **Select terms** to add more terms.

## Wide Pop-up browser

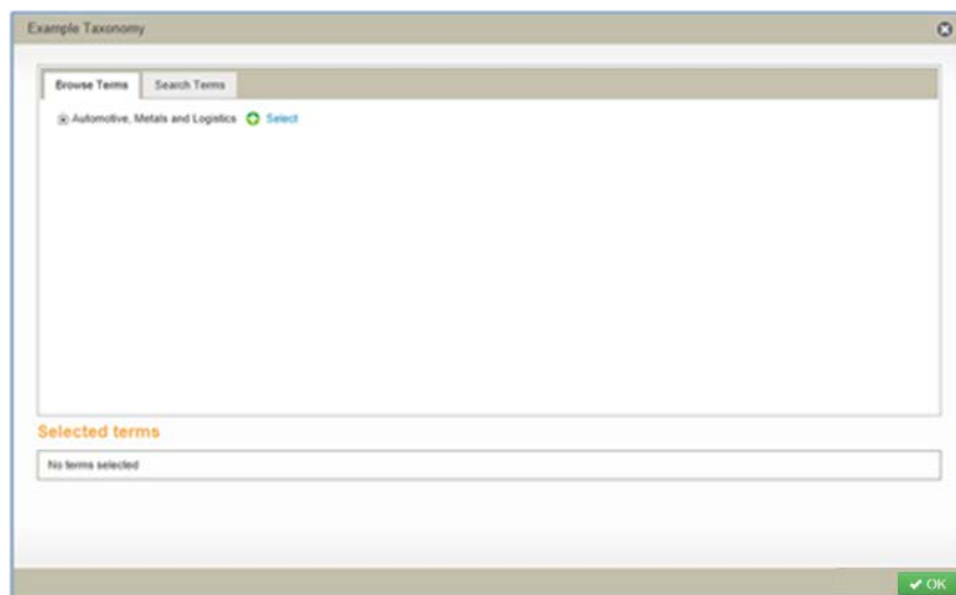
When a term selector is configured with a Wide Pop-up browser, a new page opens to select the required terms, the same as the Detailed Pop-up browser. An example of a term selector control is shown in Figure 190.



**Figure 190** Term selector with Wide Pop-up browser


### To use the Wide Pop-up browser

1. Click the **Select terms** link to open the browser. An example is shown in Figure 191.



**Figure 191** Term selector Wide Pop-up browser

(NOTE: For information on how to use the **Search Terms** tab, see [Search Terms page](#) on page 119.)

2. Click  to expand the term tree. Each term has a **Select** link. An example is shown in Figure 192.

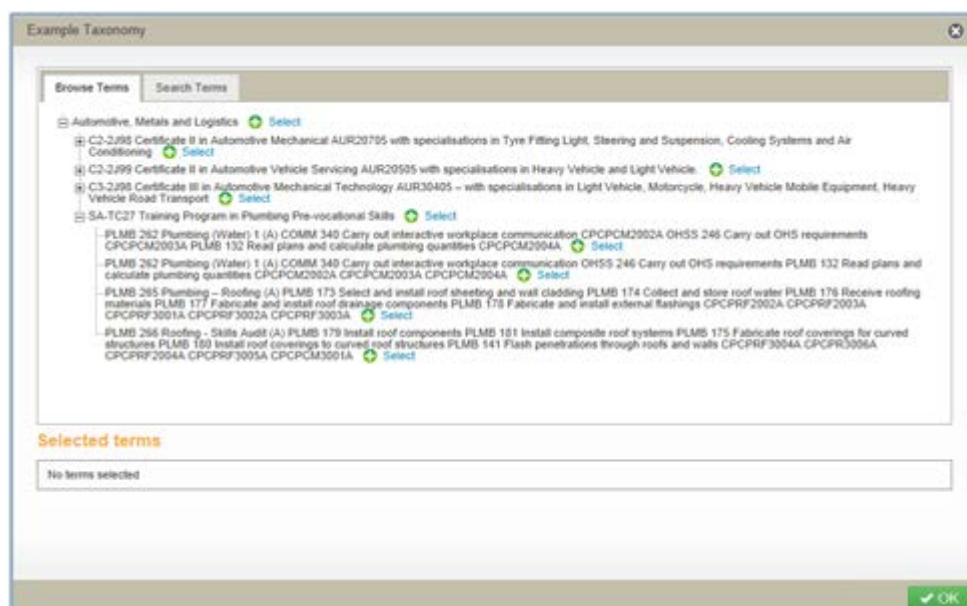


Figure 192 Wide Pop-up browser with terms displayed

- To select a term, click the **Select** link beside the required term. The term is listed in the **Selected terms** list at the bottom of the page, as shown in Figure 193.

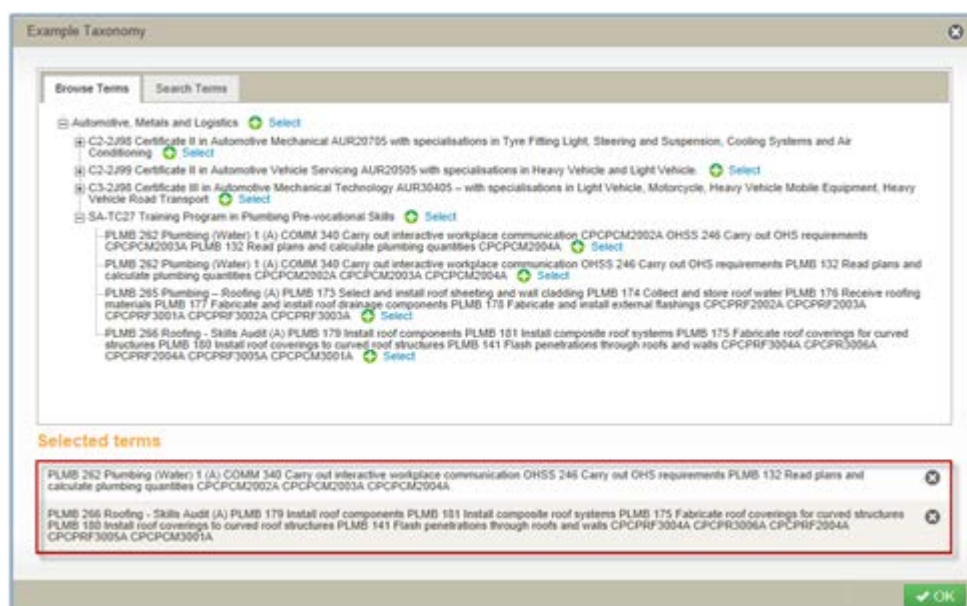
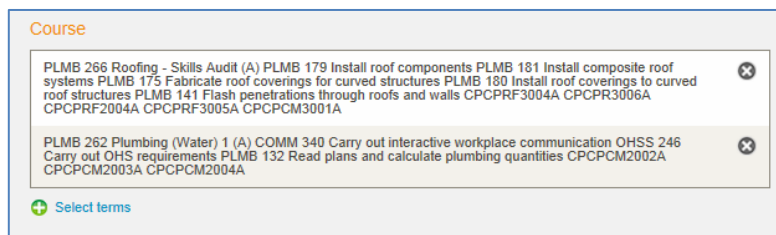


Figure 193 Selected terms


Multiple terms can be selected, depending on how the term selector has been configured.

Terms can be removed from the Selected terms list by clicking .

- Once all required terms have been selected, click . The terms selected now display in the term selector list on the contribution wizard page. An example is shown in Figure 194.



**Figure 194** Term selector list

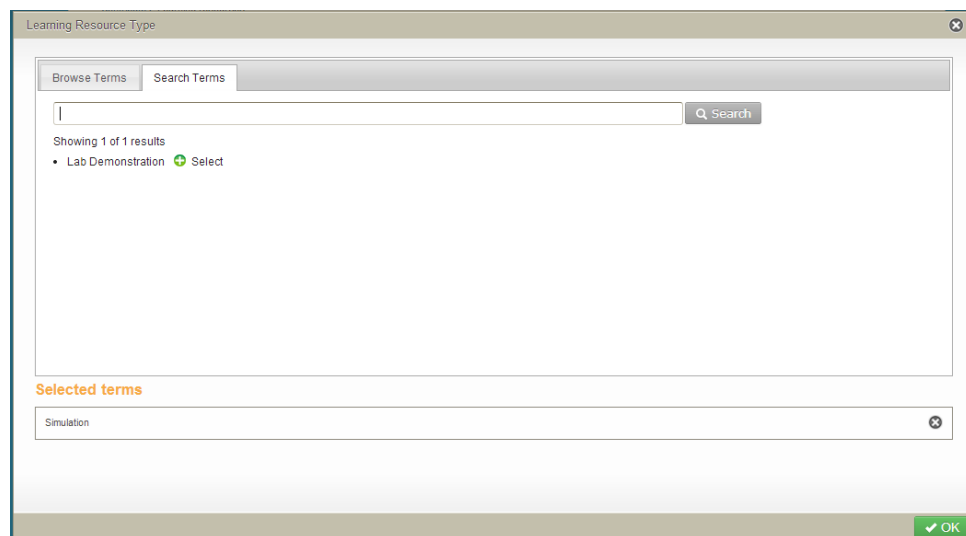
Click  to remove a term from the list.

## Search Terms page

When using a term selector with either pop-up browser types, the *Browse Terms* page displays. If a user would prefer to search for a specific term rather than browse, the *Search Terms* tab can be selected.

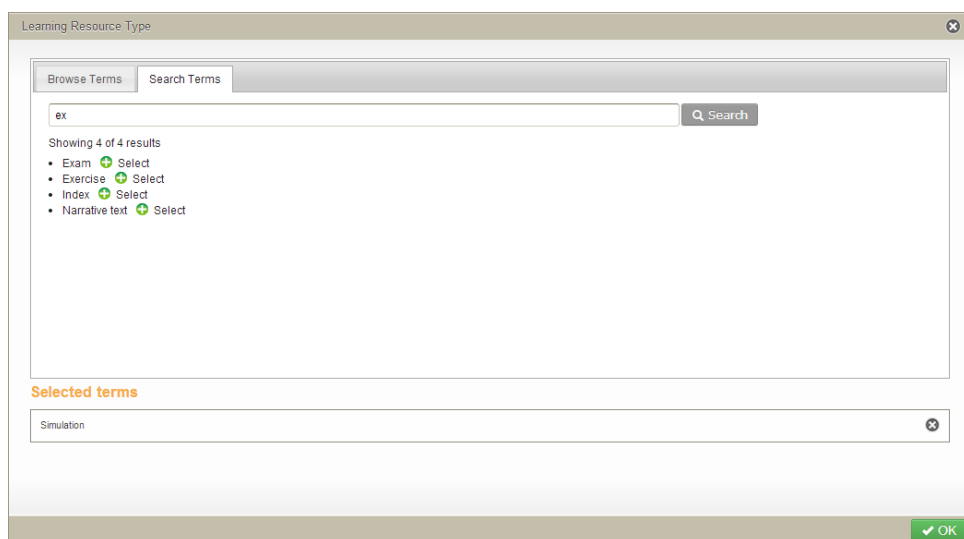
### To use the Search Terms page

1. From the pop-up browser *Browse Terms* page, select the **Search Terms** tab. The *Search Terms* page displays. An example with the Wide Pop-up browser is shown in Figure 195.




**Figure 195** Pop-up browser *Search Terms* page

2. Enter a search term (e.g. *ex*) then click . All matching results display. An example is shown in Figure 196.

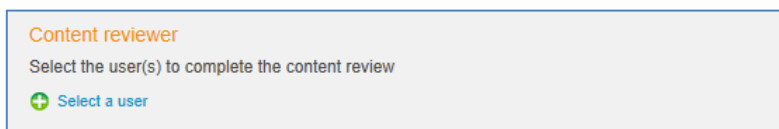


**Figure 196** Term search results

3. Click the **Select** link next to the required terms, then .

## User selector

The User selector control enables the selection of users and stores the user's details with the resource. An example is shown in Figure 197.

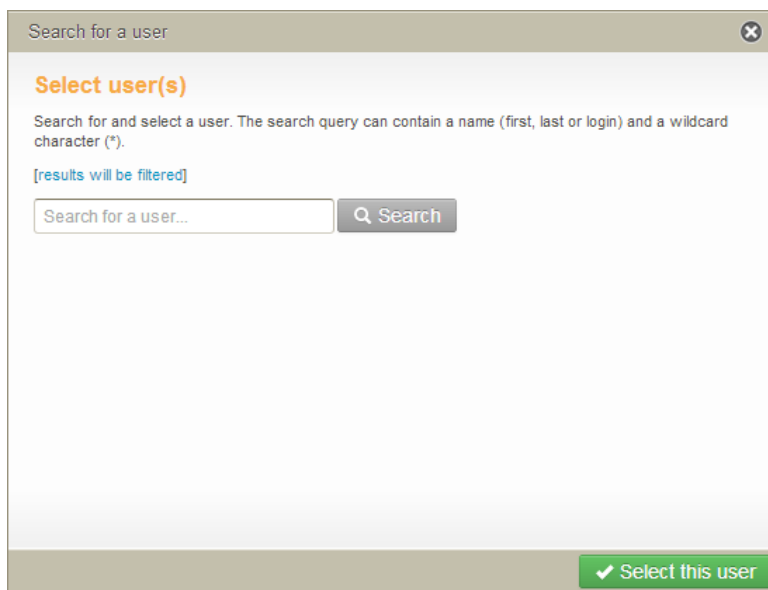


**Figure 197** User selector control


### To select users

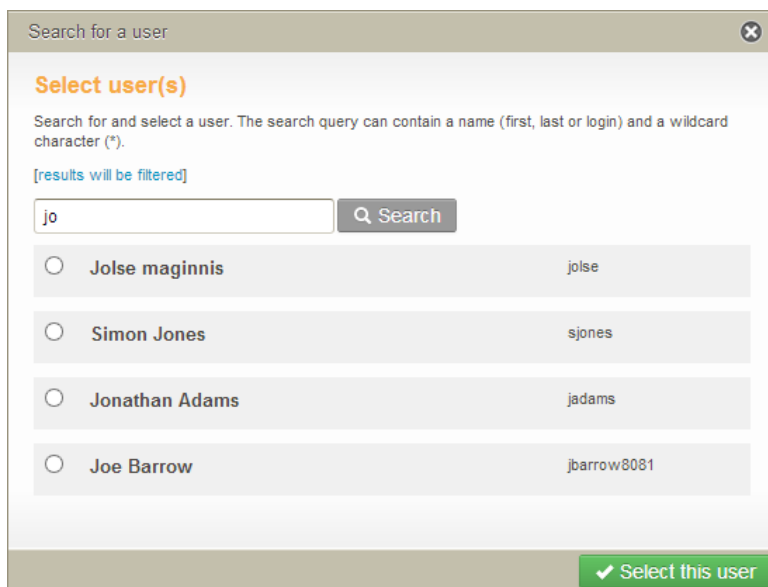
1. Select the **Select a user** link to open the **Search for users** page, as shown in Figure 198.






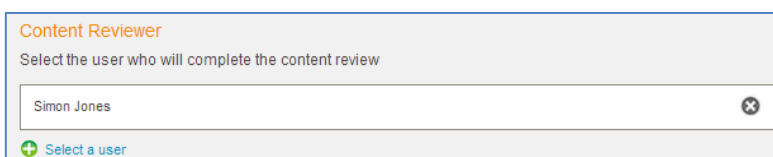
**Figure 198 Search for users page**

2. Enter search criteria such as a first name, last name or part of a name (e.g. *jo*) then click . Any users that match the criteria display in the results list. An example is shown in Figure 199.




**Figure 199 User search result list**

3. Select the required user or users, then click . The selected user or users display in a list box. An example is shown in Figure 200.



**Figure 200 User selector list**

Select the **Select a user** link to add further users to the list.

Click  to remove a value from the list.

## Contact Client Support

We are always happy to help.

If your organisation has a support agreement with EQUELLA then help is available at <http://equella.custhelp.com>.