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Features Guide

Version 6.4

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EQUELLA 6.4 features overview

This guide provides an overview of the features introduced in EQUELLA 6.4. For more information about each feature, and step by step instructions on how to use them, please see the relevant guides referenced at the end of each feature overview in this document.

EQUELLA version 6.4 introduces the following features:

- **Attachment control restrictions –** ability to apply file size, attachment number and MIME type restrictions on an attachment control. See Attachment control restrictions on page 6.
- **Attachment control display options –** ability to display attachment controls in separate, user-titled sections on the Resource summary page. See Attachment control display options on page 11.
- **Bulk collaborators –** ability to add collaborators to multiple resources in one action. See Bulk Collaborators on page 16.
- **Copyright activations enhancements –** improvements to the functionality of copyright activations with the integration screen. See Copyright activations enhancements on page 18.
- **Gallery views –** a new Videos search results view enabling video thumbnails and previews to be viewed. Additionally, files counts for both images and videos and configuration option to provide flexibility for these views. See Gallery views on page 25.
- **Google API** – a new option on the Settings page allows a Google API to be stored, so that YouTube Videos can be searched and selected. See Google API on page 31.
- **Institution filestore size limit** – a size limit can now be stored per institution. See Institution filestore size limit on page 31.
- **LTI consumer configuration changes** – changes and enhancements to the LTI consumer configuration allow for greater flexibility in role mapping and other areas. See LTI consumer configuration on page 34.
- **Online help for scripting** – the scripting shortcuts can now be viewed online. See Online help for scripting on page 37.
- **Push to LMS restriction –** ability to restrict resource availability for the Push to LMS function**.** See Push to LMS restriction on page 38.
- **Reporting enhancements –** including the availability of MS Word as an output format and the publishing of an EQUELLA 6.4 interactive database map. See Reporting enhancements on page 38.
- **Search enhancements –** a number of enhancements and new functionality have been added to search pages. See Search enhancements on page 41.
- **Term selector –** improvement to user experience. See Term Selector on page 46.
- **View attachment ACL –** a new ACL has been created to restrict access to resource metadata. See View attachment ACL on page 46.
- **Z39.50 configuration enhancements** – changes have been made to the configuration of Z39.50 Remote Repositories. See Z39.50 configuration enhancements on page 47.

Attachment control restrictions

A number of new restrictions can be configured at an attachment control level to allow administrators to better define and regulate content being added during contribution.

The following restrictions can now be set on the **Attachments** wizard control in the Collection Definition Editor:

Maximum number of attachments

If multiple attachments are allowed for an attachments control during contribution, the administrator can now set the **Maximum number of attachments allowed for this attachment control**. This is the total number of attachments across all attachment types that are enabled for the control, including files, EQUELLA resources, YouTube video links, iTunes U links, Kaltura media links, URLs, web pages, Google book links, Flickr image links and External Tool Providers. An example is shown in Figure 1.

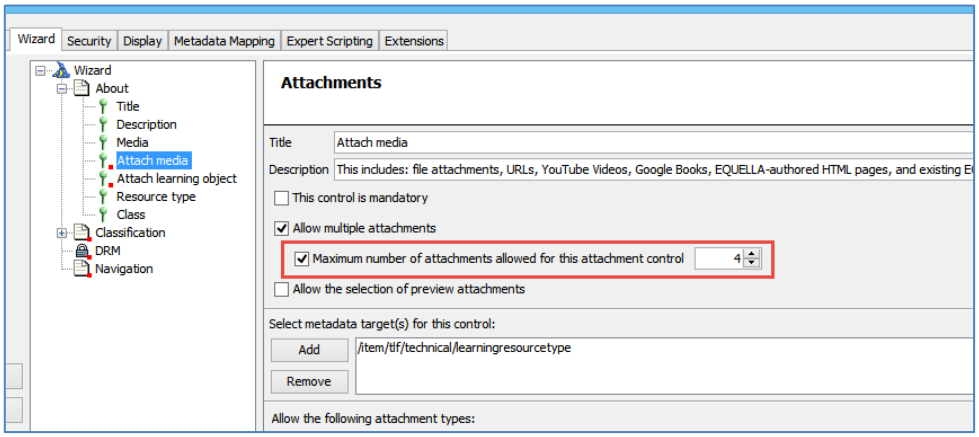

Figure 1 New option for Maximum number of attachments

Users will be prevented from adding more than the maximum allowed number of attachments when they are contributing to a collection with an attachment control that has a restriction set.

The **Add a resource** link displays when more attachments can be added. An example is shown in Figure 2.

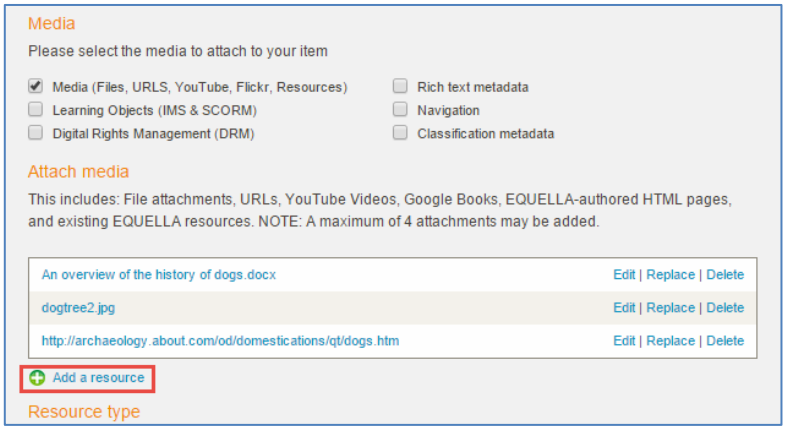

Figure 2 Add a resource link displays when more attachments can be added

Once the maximum number of attachments has been added, the **Add a resource** link no longer displays. An example is shown in Figure 3.

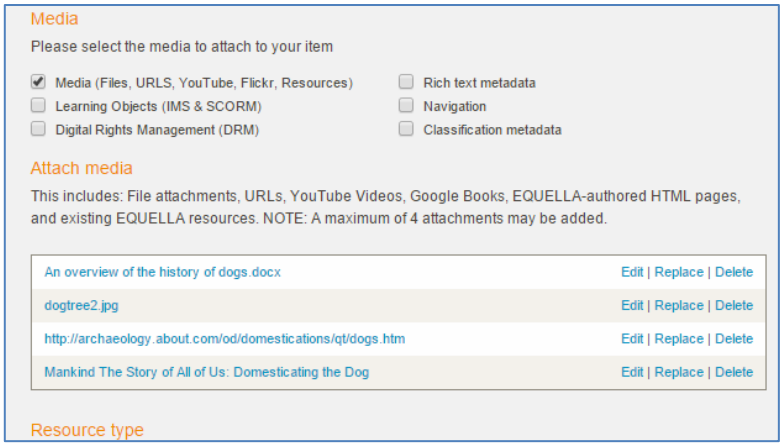

Figure 3 Add a resource link no longer displays

If a user adds multiple files using the file drag and drop functionality that results in more than the maximum number of attachments allowed being added, a message displays asking the user to remove the excess files. The user cannot successfully save their contribution until the restriction is met. An example is shown in Figure 4.

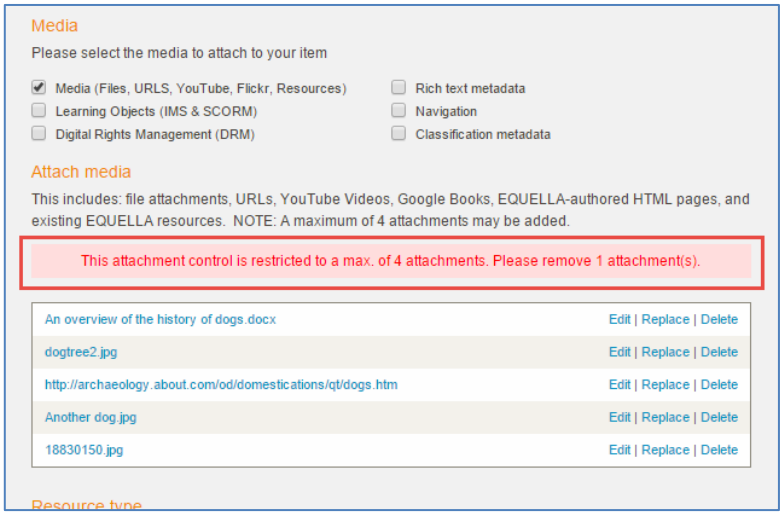

Figure 4 Message informing user to remove excess attachments

For further information, see the *EQUELLA 6.4 Wizard Controls Reference Guide* and the *EQUELLA 6.4 Contribution Guide.*

Individual upload file size

A new **Individual upload file size** restriction can be set per file within an **Attachments** control's *General* section of **Files** options. An example is shown in Figure 5.

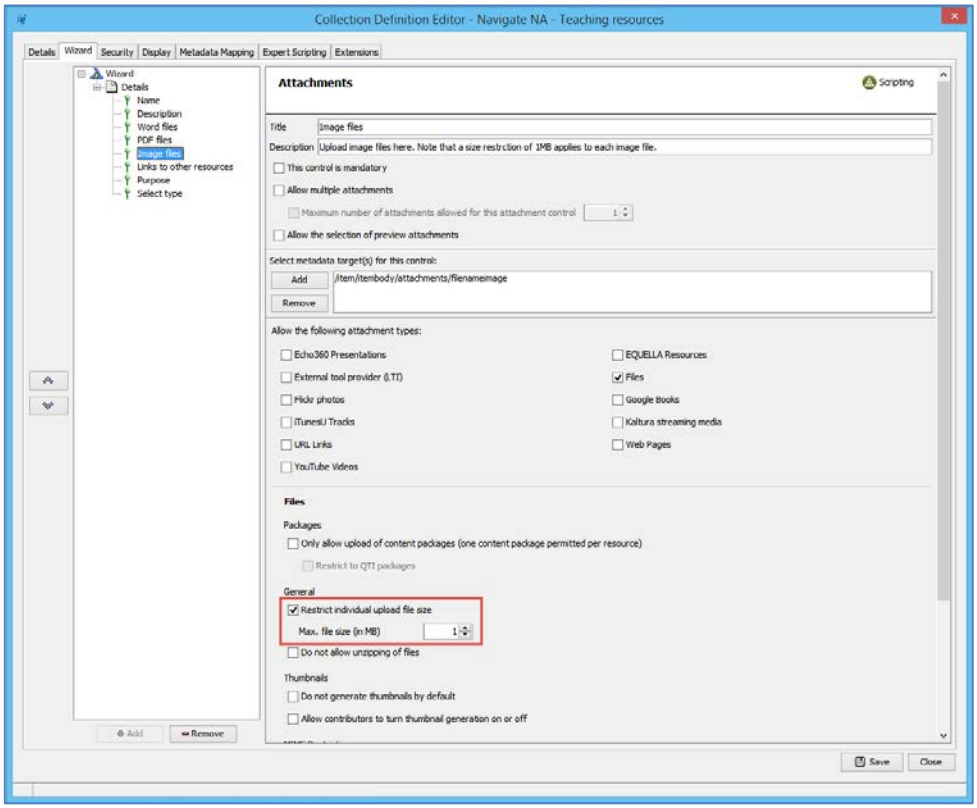

Figure 5 Restrict individual upload file size option

Users will be prevented from adding files larger than the restriction size when they are contributing to a collection with an attachment control that has file size restriction set. An example of an attempt to upload a single file larger than the stated restriction is shown in Figure 6.

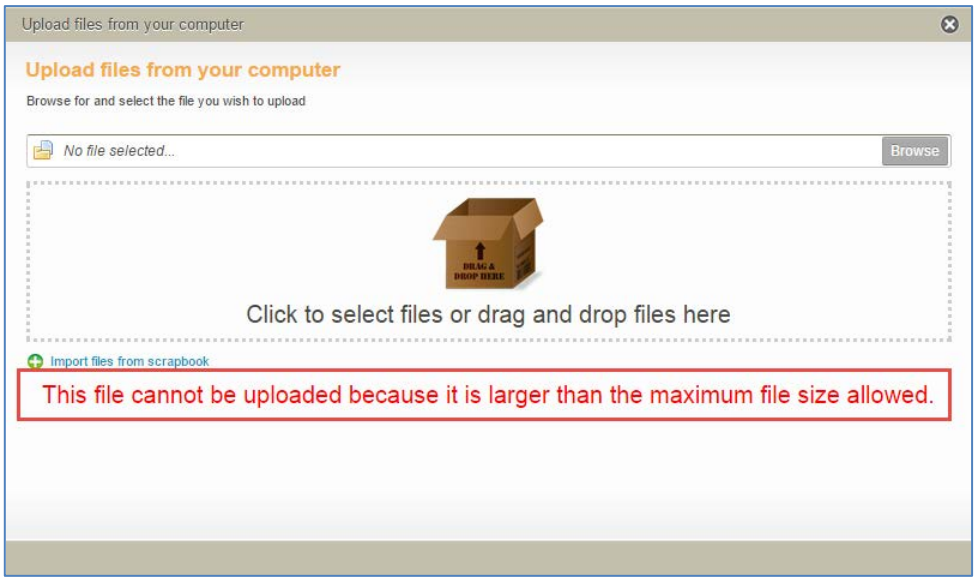

Figure 6 Message displayed when file size is larger than size restriction set

If a user adds multiple files using the file drag and drop functionality which include one or more files larger that the specified size restriction, a dialog box displays for each oversized file, informing the user that they will not be uploaded. An example is shown in Figure 7.

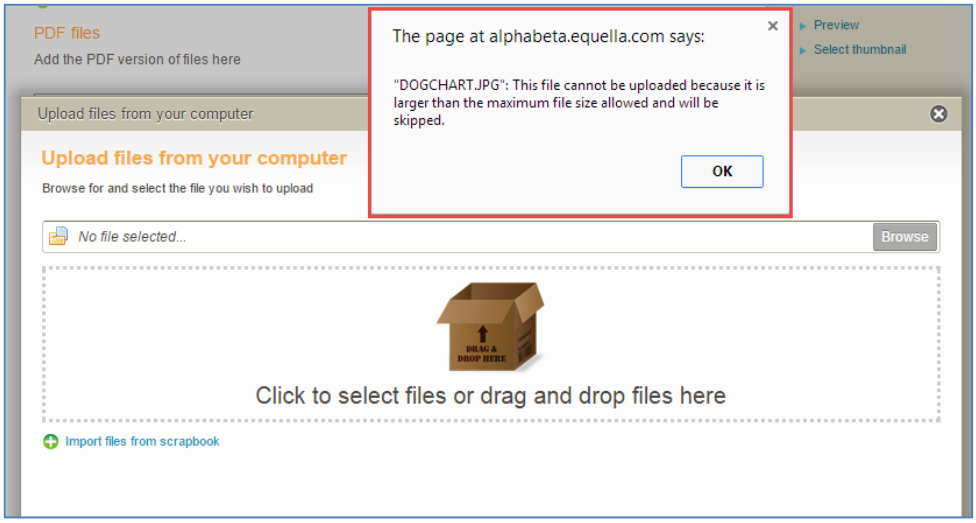

Figure 7 Message displayed for each oversized file

For further information, see the *EQUELLA 6.4 Wizard Controls Reference Guide* and the *EQUELLA 6.4 Contribution Guide*.

MIME type

Files to be uploaded via an attachments control can now be restricted to specific MIME types. An administration user can select the MIME types allowed from a list, and if files of other MIME types are attempted to be uploaded, the system displays a message to the user. The MIME types are selected from the new **MIME type restrictions** section in the **Attachments** control's **Files** options. An example is shown in Figure 8.

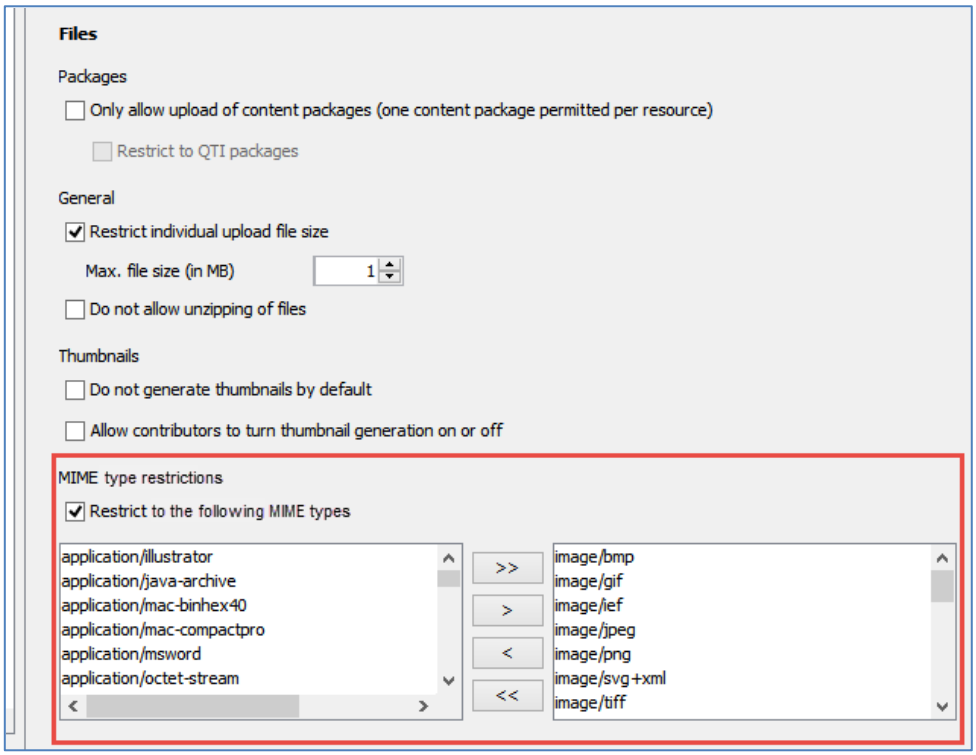

Figure 8 MIME type restrictions

Users will be prevented from adding files where the MIME types don't match those selected in the restriction list when they are contributing to a collection with an attachment control that has MIME type restrictions set. An example of an attempt to upload a single file where the MIME type is not allowed is shown in Figure 9.

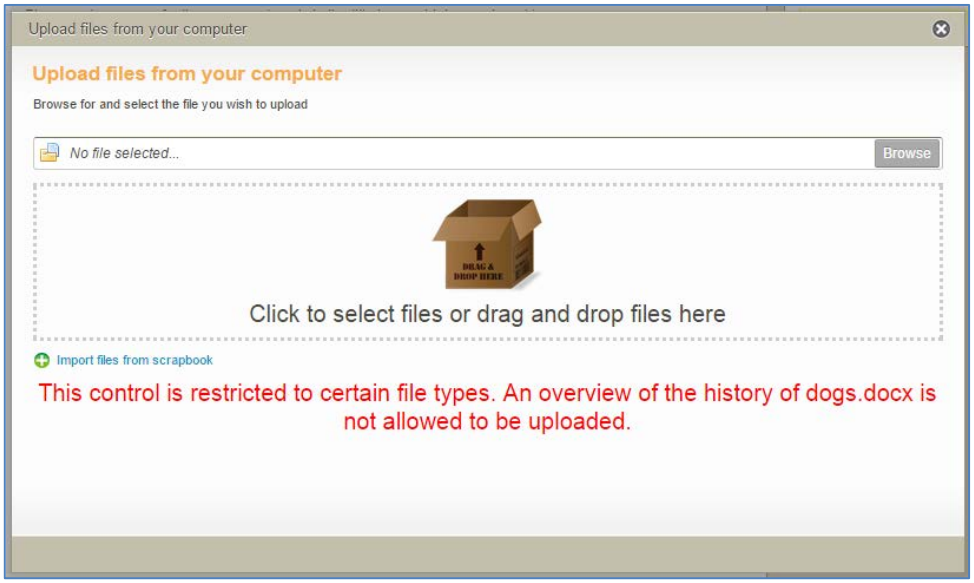

Figure 9 Message displayed when file MIME type does not match specified restriction

If a user adds multiple files using the file drag and drop functionality which include one or more files with MIME types which are not allowed, a dialog box displays for each file, informing the user that they will not be uploaded. An example is shown in Figure 10.

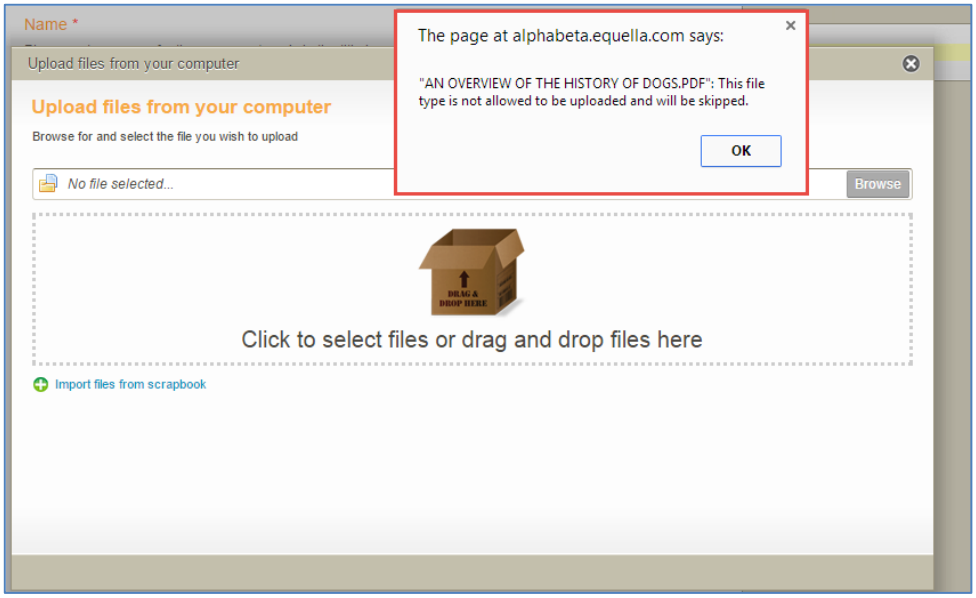

Figure 10 Message displayed for each file where the MIME type is not allowed

For further information, see the *EQUELLA 6.4 Wizard Controls Reference Guide* and the *EQUELLA 6.4 Contribution Guide.*

Attachment control display options

Changes to the way attachment controls are displayed on the Resource summary page have been introduced in EQUELLA 6.4. In prior EQUELLA versions, all attachments and

links displayed in one section titled *Links to resources* on the Resource summary page regardless of the number of attachment controls. This title could not be edited. Administrators can now:

- enter a **Title** for the attachment section (defaults to *Links to resources*).
- display multiple separately titled sections on the summary page when there are multiple attachment controls in a contribution wizard.

Attachment section titles

From the *Collection Definitions Editor* **Display** tab, the *Resource Summary Display* sub-tab shows the Resource summary sections currently displaying on the Resource summary page. Prior to 6.4, the **Attachments** section had a default title value of Attachments. This is now labelled (by default) **Links to resources** to match the heading section on the summary page. An example of the Collection Definition Editor is shown in Figure 11 and the Resource summary page in Figure 12.

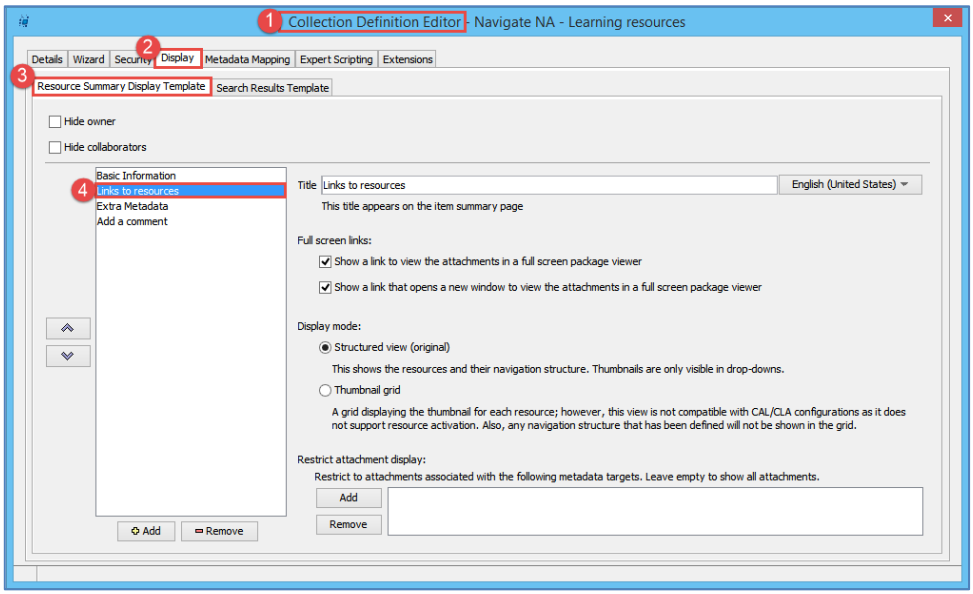

Figure 11 Links to resources summary section

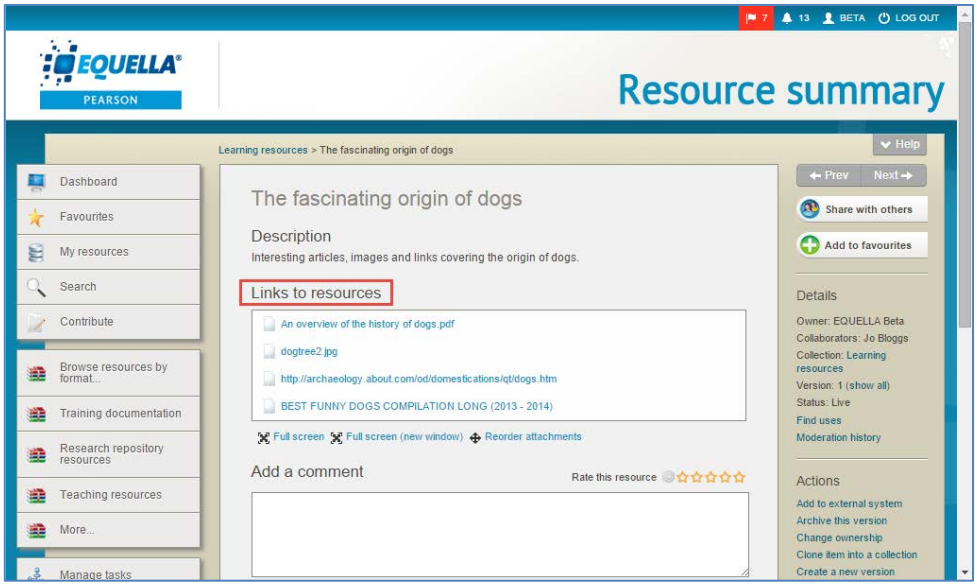

Figure 12 Links to resources title displayed on Resource summary page

Administration users can now change the attachments section title to a user-defined value. For example, rather than *Links to resources*, the user may wish the section title to display as *Documents and links*. The user types in the required title on the Resource Summary Display Template tab for the attachment section in the Collection Definition Editor. An example is shown in Figure 13.

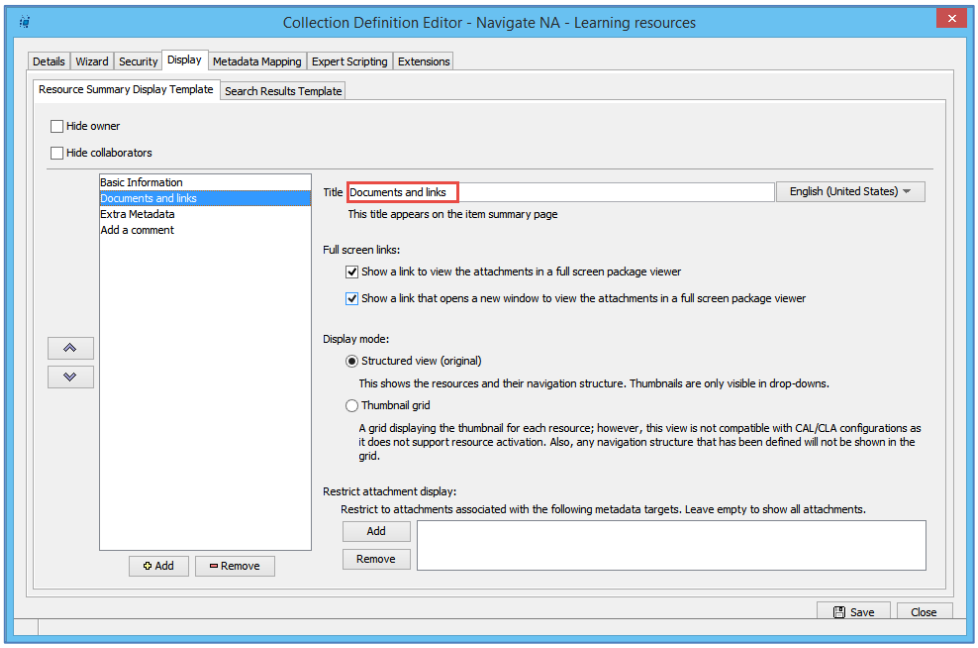

Figure 13 Resource Summary Display Template – section title changed

Once saved, the Attachments section on the Resource summary page will display the new title. An example is shown in Figure 14.

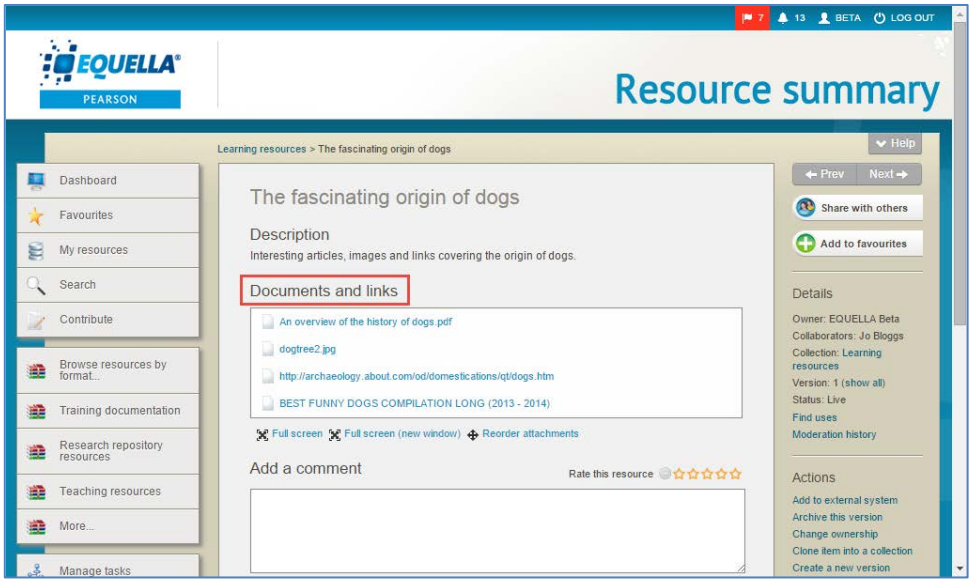

Figure 14 Resource summary page - attachments section title

Display multiple attachment sections on Resource summary page

EQUELLA 6.4 introduces the ability to display multiple attachment controls within a contribution wizard as separately titled sections on the Resource summary page, based on specified metadata nodes. Admin users can now display:

- a separate attachment section per attachment control
- user-defined groups of attachment controls
- all attachments in one section, as per prior versions of EQUELLA.

The configuration of the attachment sections is done from the *Collection Definition Editor* **Display** tab, on the *Resource Summary Display* sub-tab. An attachment section (which defaults to the title *Links to resources* when first added – see Attachment section titles on page 12) is added for each separate section required on the Resource summary page. An example is shown in Figure 15.

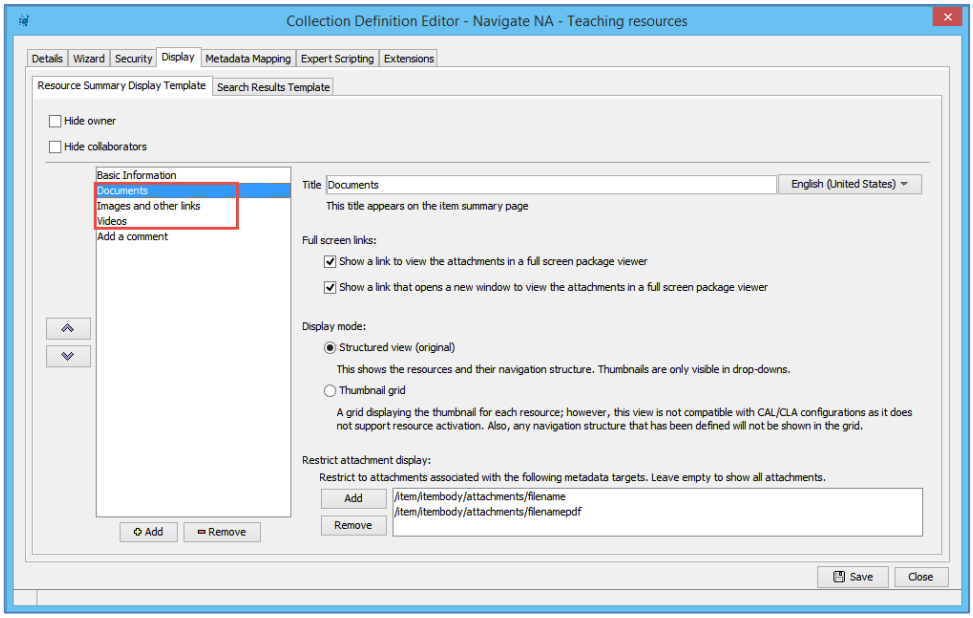

Figure 15 Resource Summary Display Template tab with three attachment sections

The attachment controls to be included in a section are defined in the **Restrict attachment display** section, where the attachment control metadata targets are selected. In the following example (Figure 16) two attachment control metadata targets have been selected to display in the section titled *Documents*.

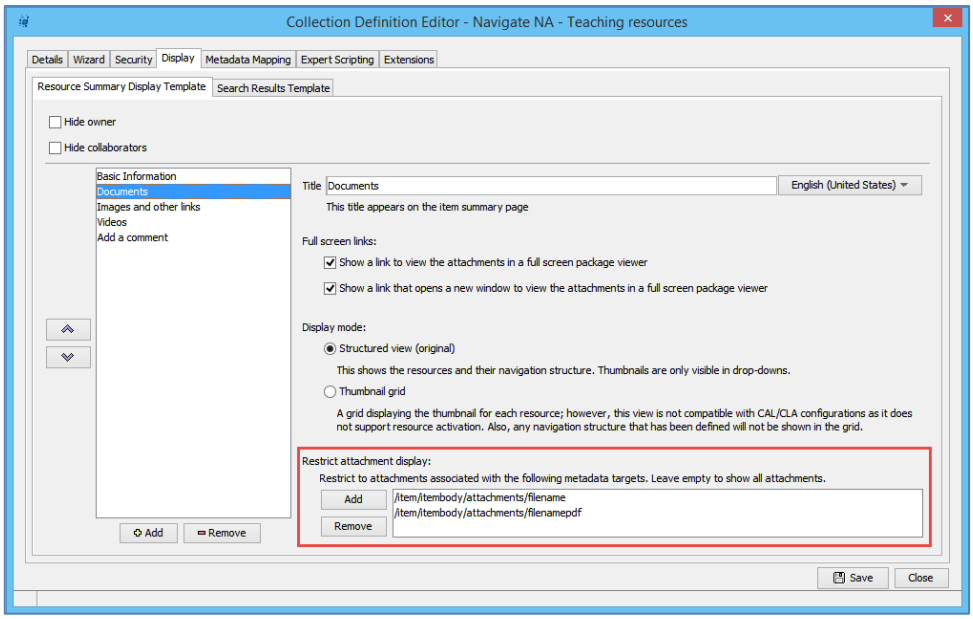

Figure 16 Restrict attachment display with two metadata targets selected

NOTE: To display all attachments for one or more attachment controls, leave this option blank.

The example in Figure 16 has three attachment selections defined. An example of the Resource summary page for this contribution wizard is shown in Figure 17.

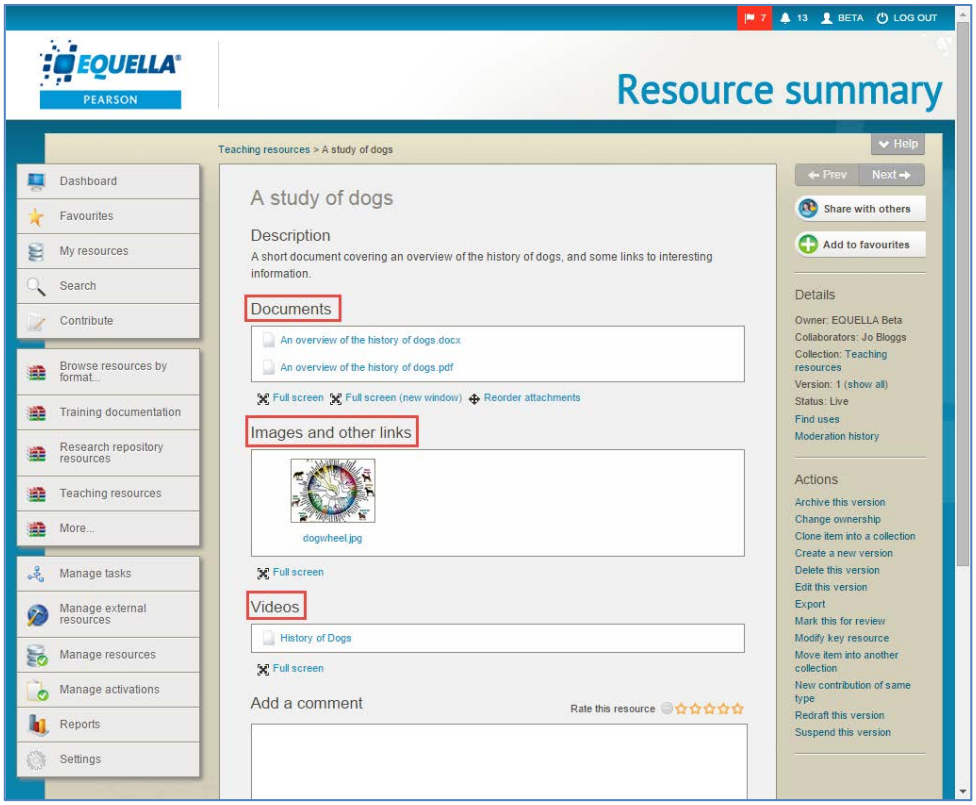

Figure 17 Resource summary page with three attachment sections

For further information, see the *EQUELLA 6.4 Collection Definitions Editor Guide.*

Bulk Collaborators

Collaborators can now be added to multiple resources in one process with the new **Add collaborators** bulk action accessed from the *Manage resources* page.

Once the required resources are selected and the

button is clicked, an administrator can choose the new **Add collaborators** bulk action from the Bulk actions list. An example is shown in Figure 18.

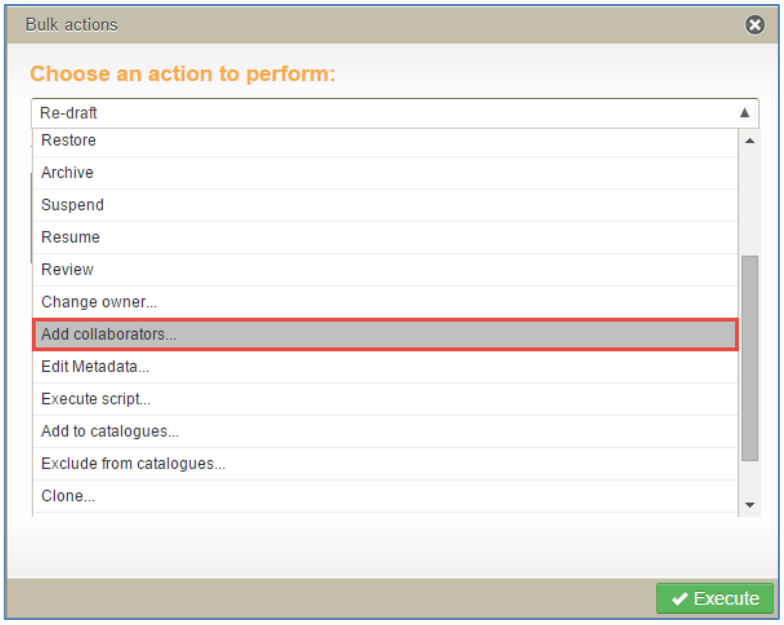

Figure 18 Bulk actions - Add collaborators

The user can then select the user/s to be added as collaborators to the selected resources. An example is shown in Figure 19.

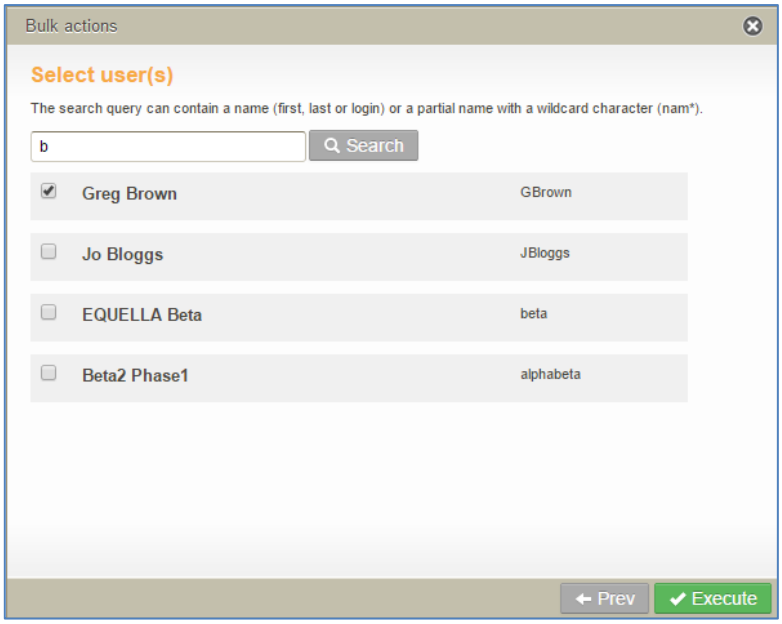

Figure 19 Select the users to be added as collaborators

Once executed, the users selected display as collaborators for each of the selected resources. An example is shown in Figure 20.

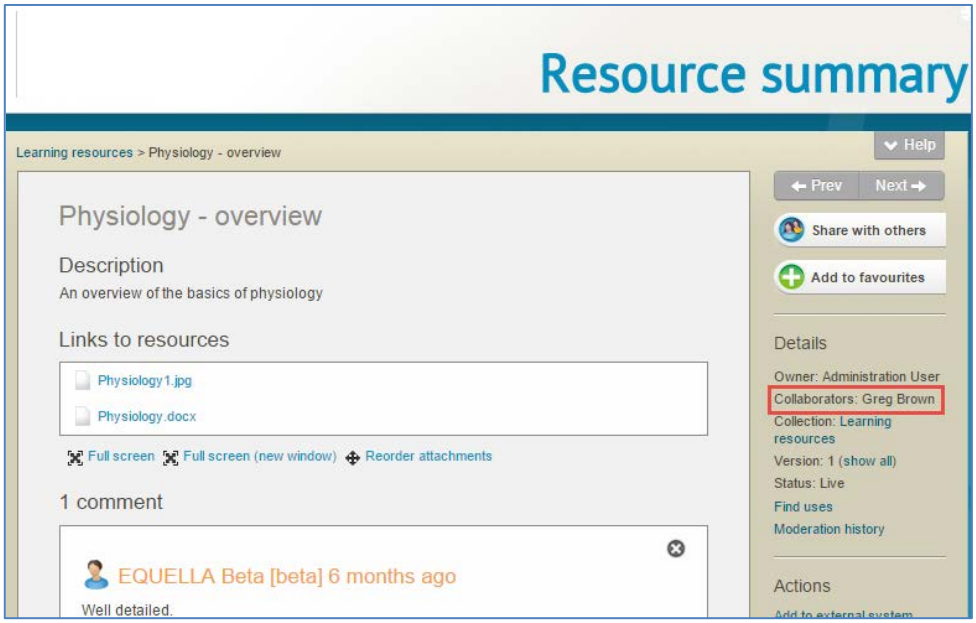

Figure 20 Resource summary page - Collaborators

Copyright activations enhancements

Enhancements have been made to the behavior of copyright items when they are being added to LMS courses, both via the structured integration screen and the Push to LMS (Add to external system) function.

Integration screen

Many institutions have librarians to manage their copyright material. Often, librarians will go through and create all the activations for courses in EQUELLA, then instructors will add those activated copyright item links into their LMS courses when they set up the course content via the integration screen.

In EQUELLA versions previous to 6.4, activations created in native EQUELLA would not display and were not selectable from the integration screen. In EQUELLA 6.4, users can now:

- Select existing activations (pending and active) to add to a course, regardless of whether they have the COPYRIGHT_ITEM or VIEW_ACTIVATIONS privileges.
- Select existing activations, but also have access to the **Activate and Add** button during the selection session when users have the COPYRIGHT_ITEM privilege.

Users without the COPYRIGHT_ITEM privilege

When a user without the COPYRIGHT_ITEM privilege accesses the EQUELLA integration screen from an LMS course page, any copyright items that have been activated against that course display as selectable attachments on both the results page and the Resource summary page. An example of the results page is shown in Figure 21.

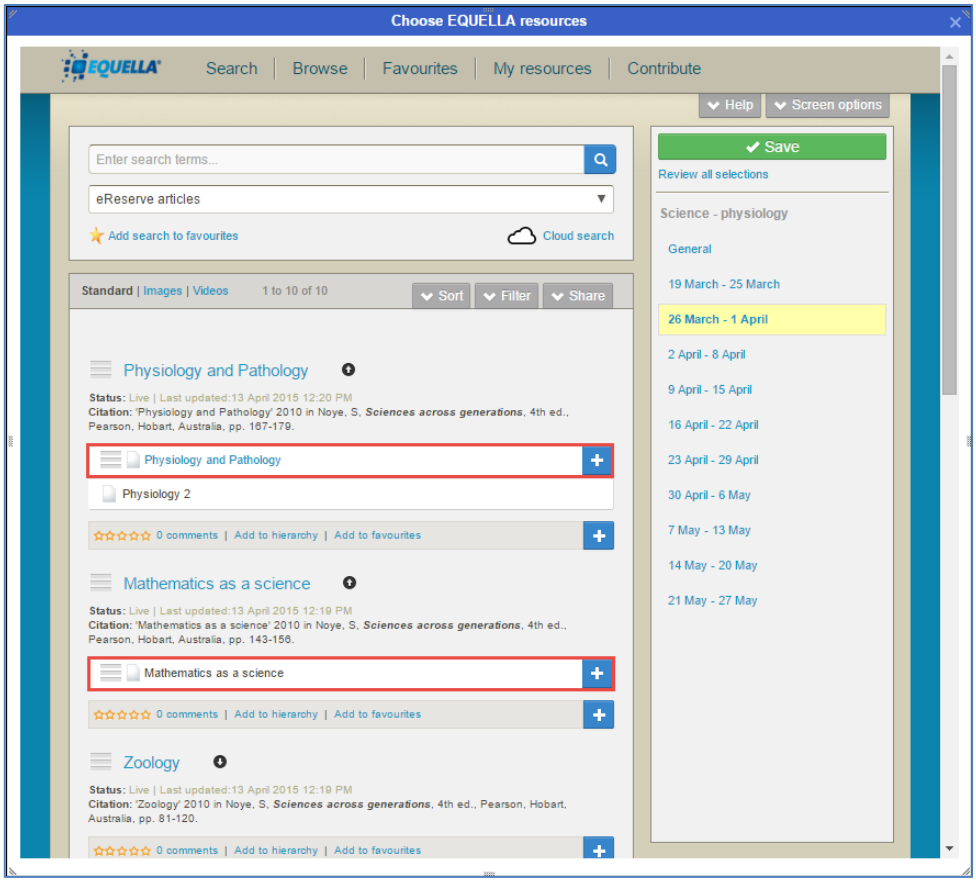

Figure 21 Example of a Moodle/EQUELLA results page with selectable copyright attachments

An example of the Resource summary page is shown in Figure 22.

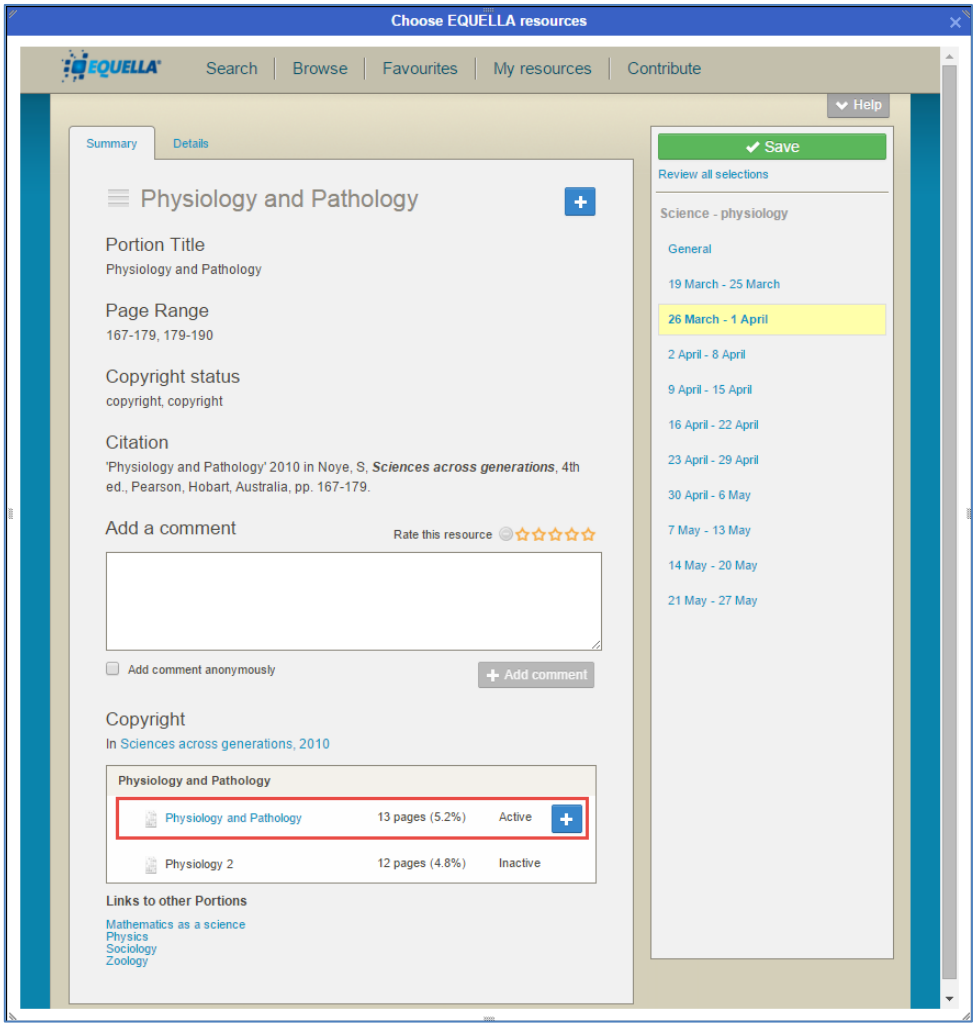

Figure 22 Example of Moodle/EQUELLA integration Resource summary page with an activated attachment available for selection

The Active or Pending attachments can be added to the course section by clicking the + button.

NOTE: Inactive attachments cannot be added to a course. Similarly, copyright attachments that have been activated against other courses cannot be added to the current course. In these cases, the attachment does not have the + button available. An example where an attachment has been activated against a course other than Science – physiology *is shown in Figure 23.*

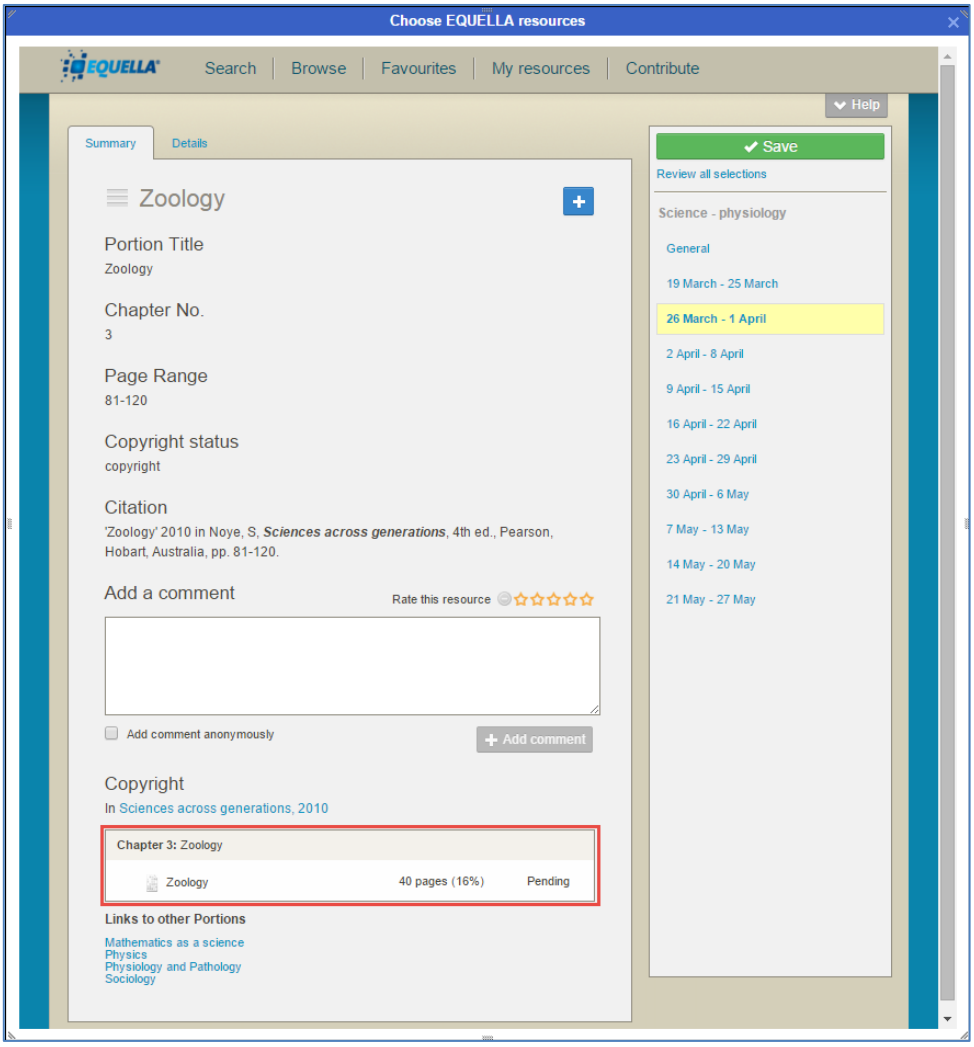

Figure 23 Copyright item with pending activation (activated against a different course) – no Select button

Users with the COPYRIGHT_ITEM privilege

When a user with the COPYRIGHT_ITEM privilege accesses the EQUELLA integration screen from an LMS course page, any copyright items that have been activated against that course display as selectable attachments on both the results page and the Resource summary page. The Resource summary page also displays an **Activate and Add** button for each attachment. This buttons opens the **Activate attachments** page for the user to create new activations to add to the current course. An example is shown in Figure 24.

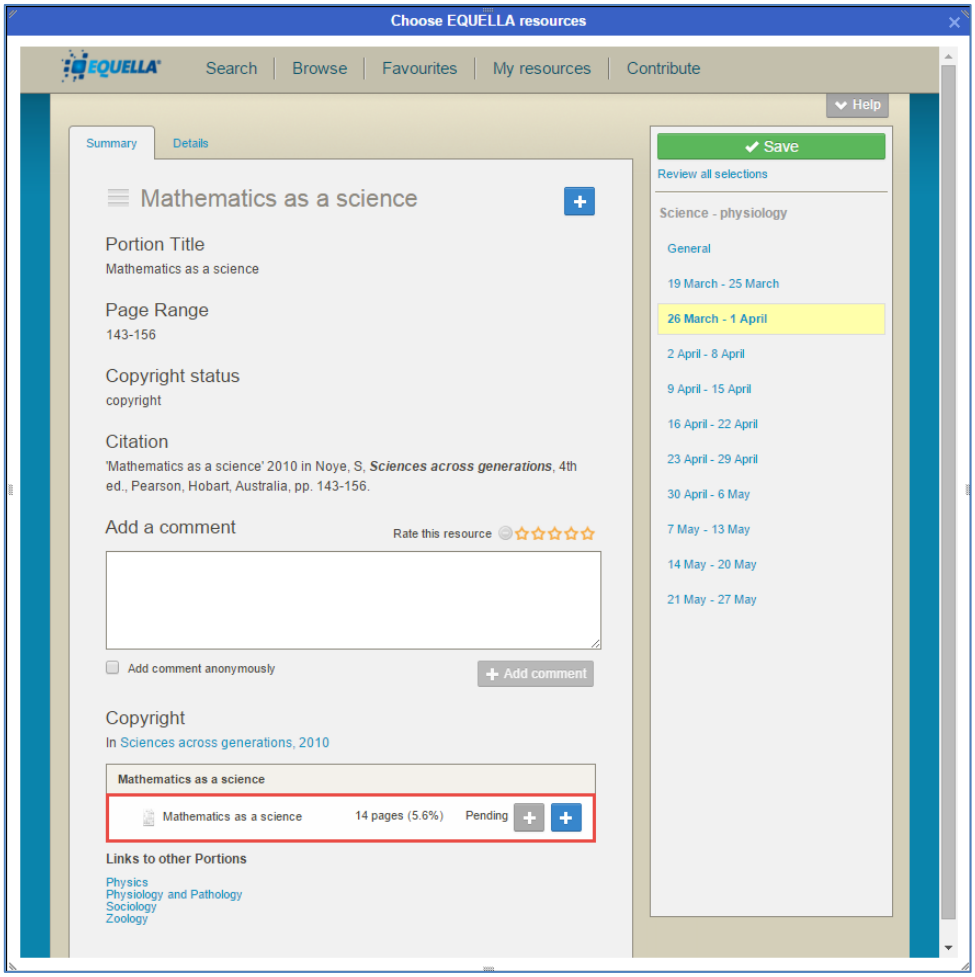

Figure 24 Resource summary page with Activate and Add and Select buttons displayed

Hover over the + button to view the **Activate and Add** label. An example is shown in Figure 25.

Figure 25 Hover for full label

Click the + button to open the **Activate attachments** page to create a new activation which will then be added to the course. An example is shown in Figure 26.

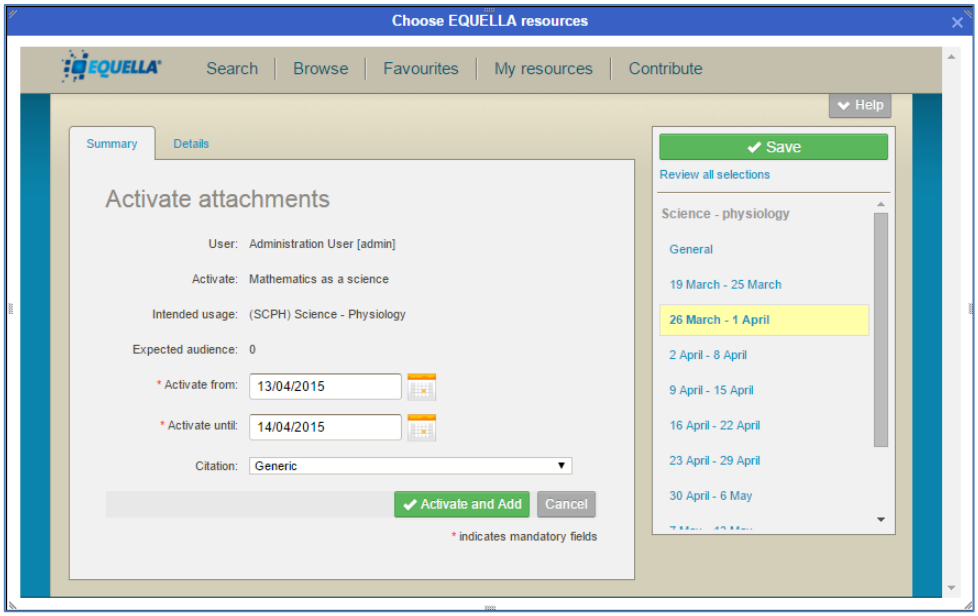

Figure 26 Activate attachments page

Clicking the Activate and Add button creates the activation and adds it to the highlighted course section.

Push to LMS

Copyright rules have been added to the **Push to LMS** (**Add to external system**) functionality to streamline the adding of copyright items to LMS courses via the **Add to external system** link available from the **Actions** menu of the Resource summary page.

The following rules now apply:

- Only *Active* or *Pending* attachments can be added to courses.
- *Active* and *Pending* attachments can be added only to the relevant courses they have been activated against.

An example of the **Add to external system** page is shown in Figure 27.

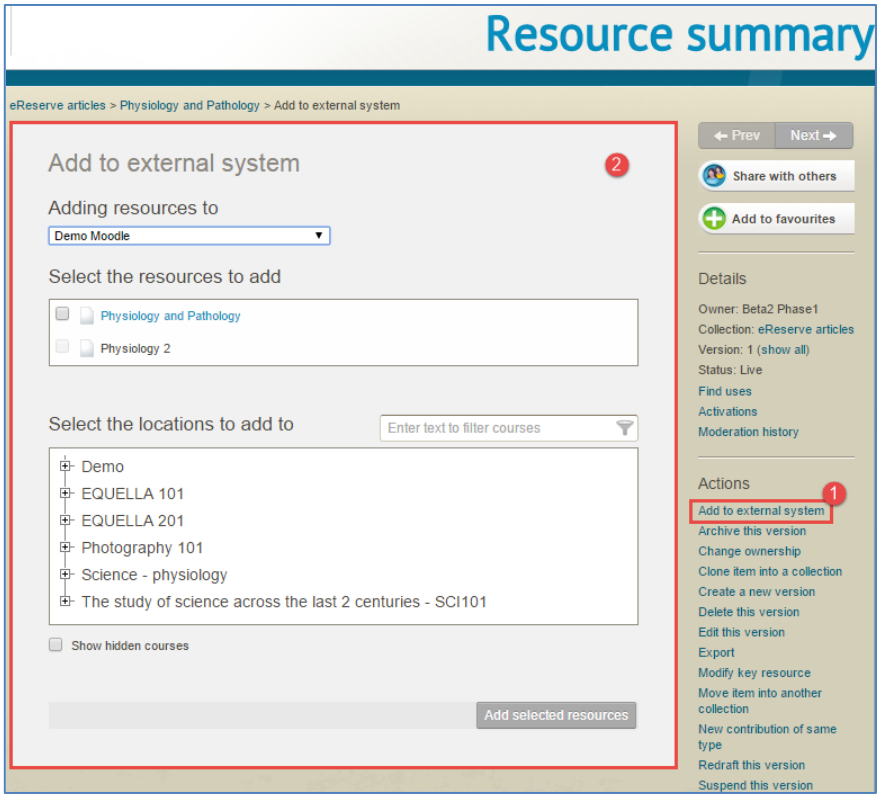

Figure 27 Add to external system page

In the **Select the resources to add** section, note that *Physiology and Pathology* can be selected, as there is an existing active activation, whereas *Physiology 2* can't be selected because it is currently inactive.

Once *Physiology and Pathology* is selected, the **Select the locations to add to** section updates to display only those courses that the attachment has been activated against. An example is shown in Figure 28.

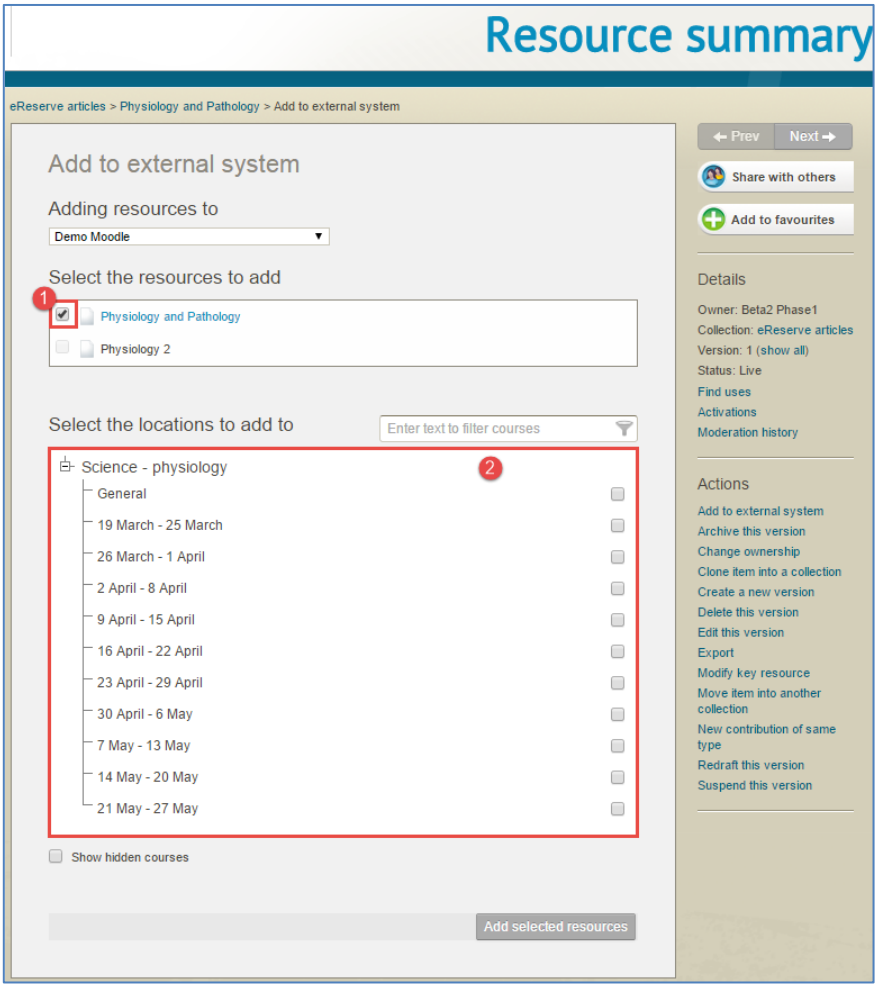

Figure 28 Add to external system - with only relevant courses displayed

Gallery views

EQUELLA 6.4 introduces the new **Videos** view search results page, which, similar to the Gallery view introduced in EQUELLA 6.3 (now renamed *Images*), displays video resources in a thumbnail format. A simple mouse-over enlarges the thumbnail instantaneously and displays options, including the ability to watch a preview.

Generate video thumbnails and previews

youTube and Kaltura

After the EQUELLA 6.4 upgrade is run, a thumbnail will be automatically generated for any new youTube or Kaltura attachments and display in the Videos view, but a simple, one-off reindexing process needs to be completed for existing attachments to display. Once this process is completed, any resources that contain a youTube and Kaltura link as an attachment will display on the Video results page. Note that if a resource has multiple video links, the first video in the list of attachments is used as the default thumbnail on the Videos page.

For existing youTube and Kaltura videos to display in the **Videos** view, once the EQUELLA instance is upgraded to 6.4, the following steps need to be completed:

1. From the **Settings**, **Manual data fixes** page, in the *Refresh the content index* section, click Refresh index

An example is shown in Figure 29.

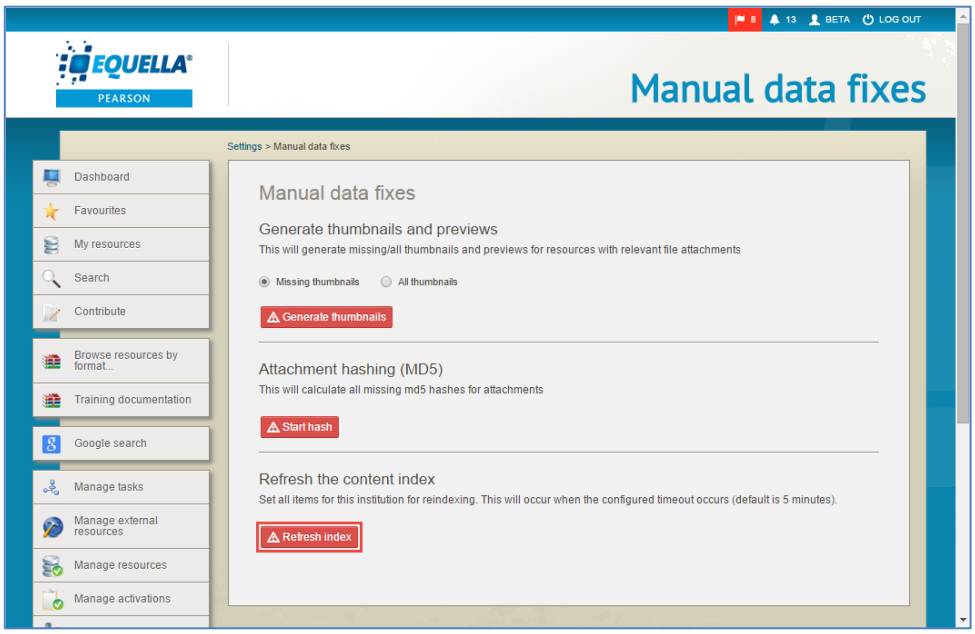

Figure 29 Manual data fixes page

Once this process is complete, all existing youTube and Kaltura videos display on the **Videos** results page, using the default youTube or Kaltura thumbnail.

See the *EQUELLA 6.4 Upgrade Guide* for further information.

Video files uploaded as file attachments

Video files uploaded to EQUELLA as file attachments do not display in the Video view until the following steps are carried out:

1. Install Libav, a free, third-party product used by EQUELLA to produce thumbnails and previews for video files. Libav needs to be installed on the EQUELLA server (or each EQUELLA server in a clustered environment).
2. Once Libav is installed, the optional-config file needs to be updated to reflect the libav path. An example is shown below:

```
# Libav path. For example C:/Libav/usr/bin
libav.path = C:/Program Files/libav/libav-x86_64-w64-mingw32-11/usr/bin
```

3. Upgrade to EQUELLA 6.4 (this step can also be carried out prior to steps 1 and 2).

Note: See the EQUELLA 6.4 Upgrade Guide for full instructions on installing and configuring Libav.

4. From the **Settings**, **Manual data fixes** page, in the *Generate thumbnails and previews* section, select **Missing thumbnails** then click Generate thumbnails. An example is shown in Figure 30.

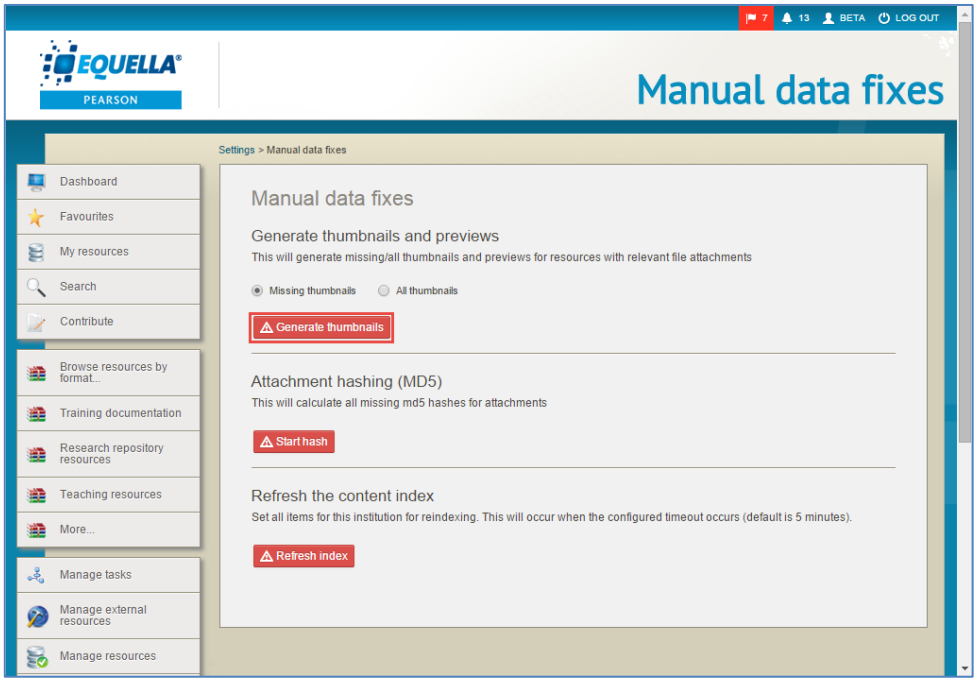

Figure 30 Manual data fixes - Generate thumbnails

Thumbnails are created from the 5th second of a video, and ten second previews are created from the 5th until the 15th second of a video. These previews can be played from the **Video** view.

See the *EQUELLA 6.4 Upgrade Guide* and the *EQUELLA 6.4 Installation and Administration Guide* for further details.

Videos view page

The **Videos** view is accessed by clicking the **Videos** link at the top-left of the Results box on the Search and Favourites pages. An example is shown in Figure 31.

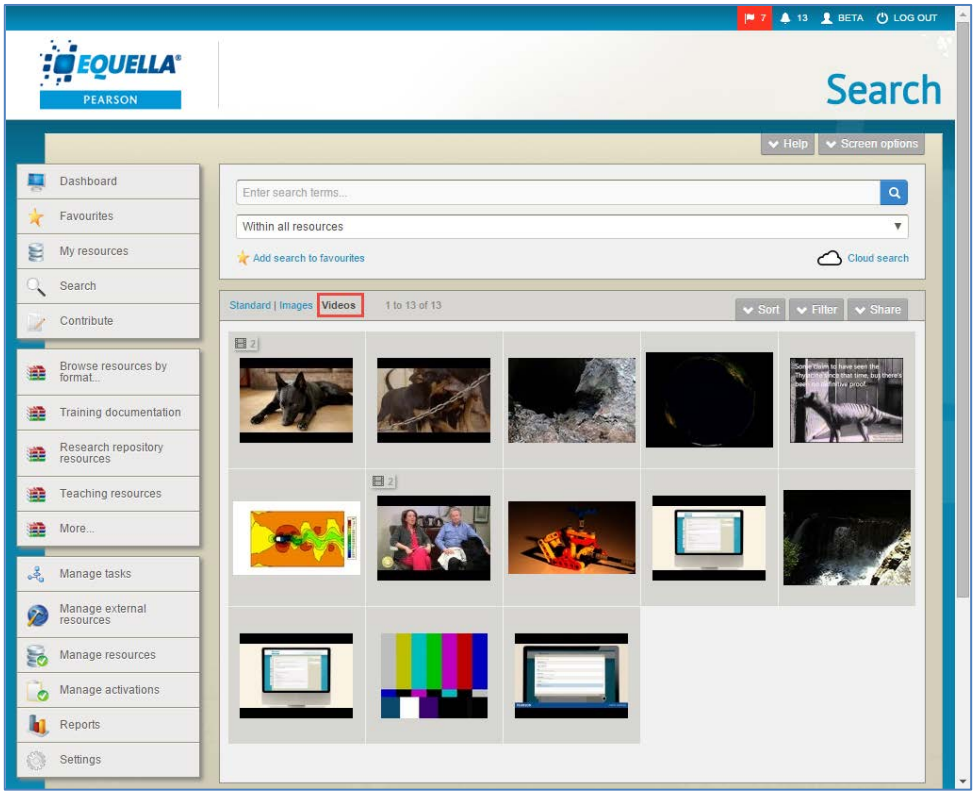

Figure 31 Search page - Videos view

Click the **Standard** link to return to the standard results page format, or **Images** to go to the image results page format.

Up to 30 video thumbnails are displayed per page, with links to other pages if relevant.

Previewing videos

To preview a video file, hover the mouse over a specific video thumbnail to display a 320px X 180px preview frame. An example is shown in Figure 32.

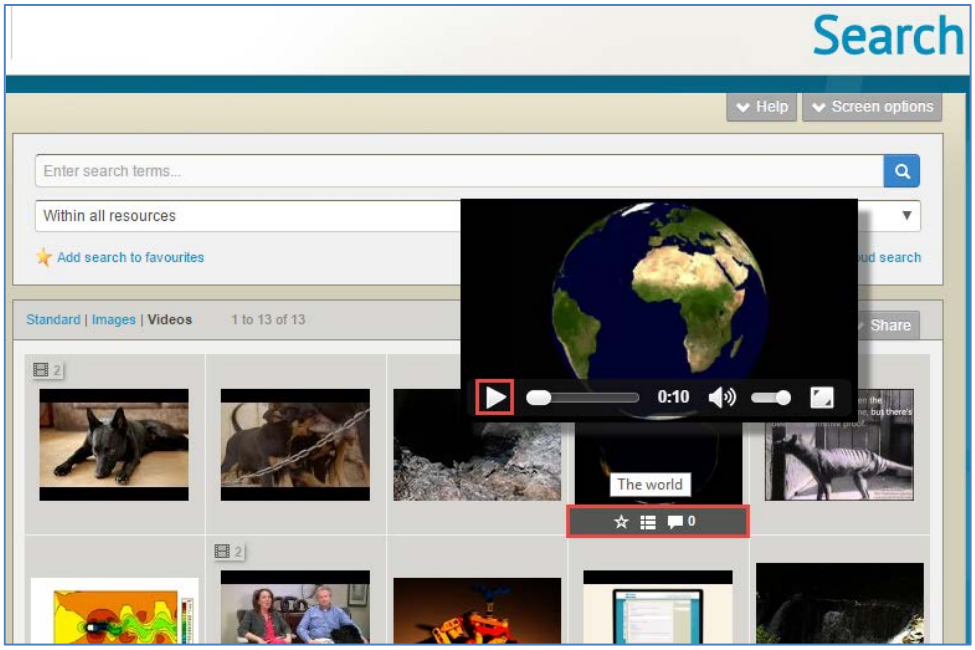

Figure 32 Video preview frame and thumbnail menu

Select the ▶ button to play the preview. Kaltura and youTube videos can be previewed in their entirety, and ten second previews can be viewed for video files uploaded to EQUELLA as a file attachment. To stop the preview, move the mouse away from the preview frame.

While the mouse is hovering over a specific video thumbnail, a menu displays at the bottom of the thumbnail, containing the following icons:

☆ - Click to open the *Add to favourites* dialog and add the resource to your Favourites.

☰ - Click to open the *Modify key resource* dialog to add or delete the resource as a key resource from a hierarchy.

💬1 - Click to open the *Resource summary* page with a focus on the *Comments* section.

Click on the thumbnail image to open the Resource summary page.

Multiple video attachments

When there are multiple videos for a resource, the thumbnail of the first video in the attachments list is used to represent the resource on the Videos page. The *Reorder attachments* feature introduced in EQUELLA 6.3 can be used to change the order of the attachments, and placing a different video at the top of the list will change the thumbnail (and available preview) used on the Videos page.

On the **Videos** results page, resources with multiple videos display an icon indicating the number of attached video files or links in the top left of the thumbnail. This alerts users to the existence of other videos for which no thumbnail is available from the Videos view. The user can open the Resource summary page to view the other videos. An example is shown in Figure 33.

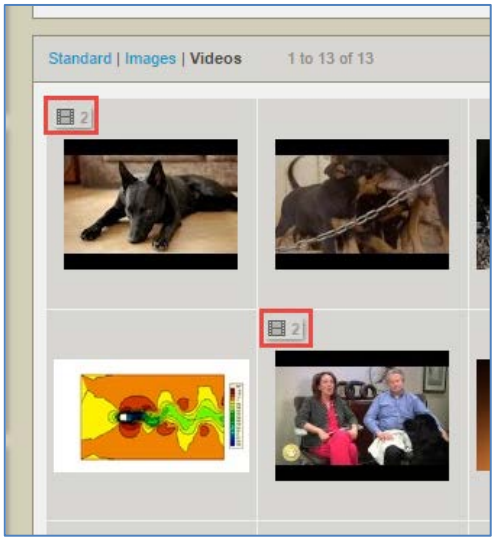

Figure 33 File count icon

Multiple image files

On the **Images** view results page (previously labelled *Gallery* view in 6.3), resources with multiple image files now display an icon indicating the number of attached images in the top left of the thumbnail. This alerts users to the existence of other image files for which no thumbnail is available from the Images view. The user can open the Resource summary page to view the other images. An example is shown in Figure 34.

Figure 34 File count icons

Gallery view configuration options

In some cases, administrators may wish to disable the Images and/or Videos views. This will remove the **Images** and/or **Videos** links at the top left of the results box. Thumbnails for image and video files will still be created in the background, so if the views are enabled at some point in the future, thumbnails will display immediately.

Additionally, the file count that shows to the top left of image and video thumbnails when there are multiple files can also be disabled.

Gallery views options are accessed from the **Settings, Searching and content indexing** page, in the **Gallery views** section, and include:

- **Disable Images** – select to remove the **Images** link from the results box, or uncheck to add the Images link to the results box (default is unchecked).
- **Disable Videos** – select to remove the **Videos** link from the results box, or uncheck to add the Videos link to the results box (default is unchecked).
- **Disable file count** – select to remove the file count indicator that displays at the top left of thumbnails when there are multiple image or video attachments.

An example is shown in Figure 35.

Figure 35 Gallery views options

For further information, see the *EQUELLA 6.4 Searching User Guide.*

Google API

Google have switched off their old YouTube search API and now require application developers to use the latest YouTube Data API (v3). In their words:

> *The YouTube Data API (v3) lets you incorporate YouTube functionality into your own application. You can use the API to fetch search results and to retrieve, insert, update, and delete resources like videos or playlists.*

A new **Google API** option on the *Settings* page allows a Google API key (with the new YouTube Data API (v3) enabled) to be stored in EQUELLA. This allows users to search and select YouTube content from an attachment control during contribution in the same manner as prior to the API change.

NOTE: If the Google API key *is not configured in EQUELLA, existing YouTube links will continue to open and play. However, searching for new YouTube content during contribution or editing of resources will result in the following message being displayed:*

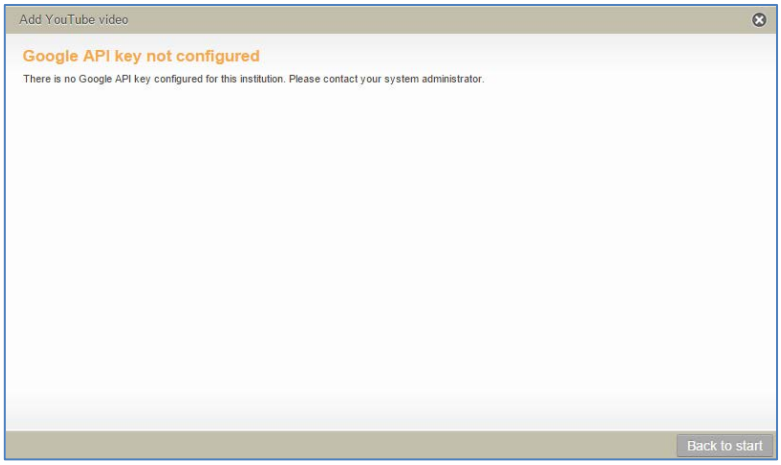

Figure 36 Message when no Google API key configured

Google API configuration

The Google API option is accessed from **Settings, Google API.** The **Google API** page displays. An example is shown in Figure 37.

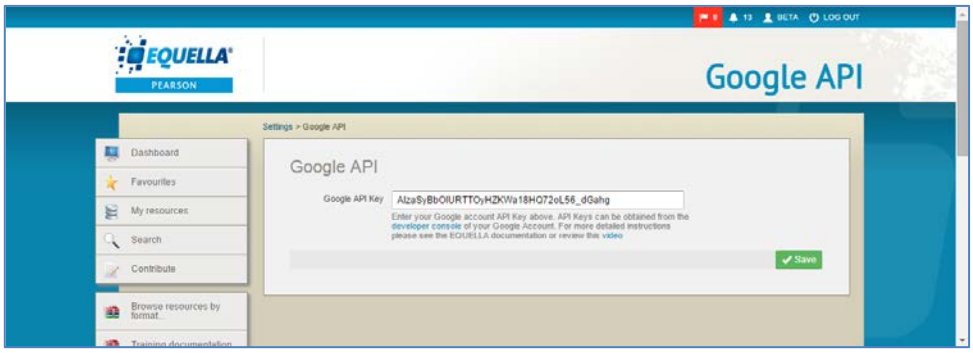

Figure 37 Google API page

The Google API Key as provided by Google is entered. API Keys can be obtained from the Developers Console site after creating a project. For step-by-step instructions to obtain a Google API Key (with YouTube Data API (v3) enabled), use the video link on the Google API page or click here.

See the *EQUELLA 6.4 Upgrade Guide* for further information.

Institution filestore size limit

EQUELLA 6.4 allows administrators to set a filestore size limit per institution. This allows administrators to monitor the size of the filestore and receive warning emails once the size limit has been reached.

The new setting is accessed from the **Server Administration, Institutions** page. An example is shown in Figure 38.

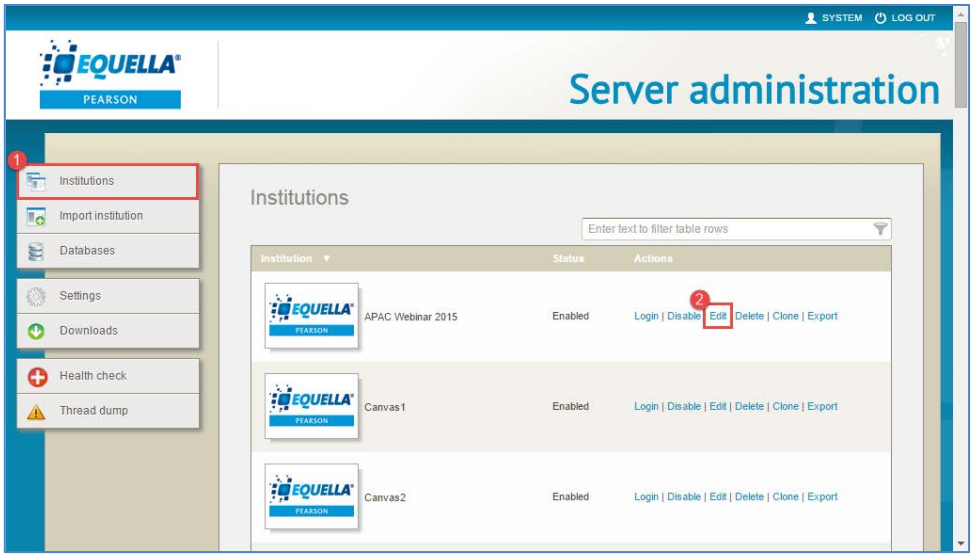

Figure 38 Server administration – Institutions page

The **Edit institution** page displays. An example is shown in Figure 39.

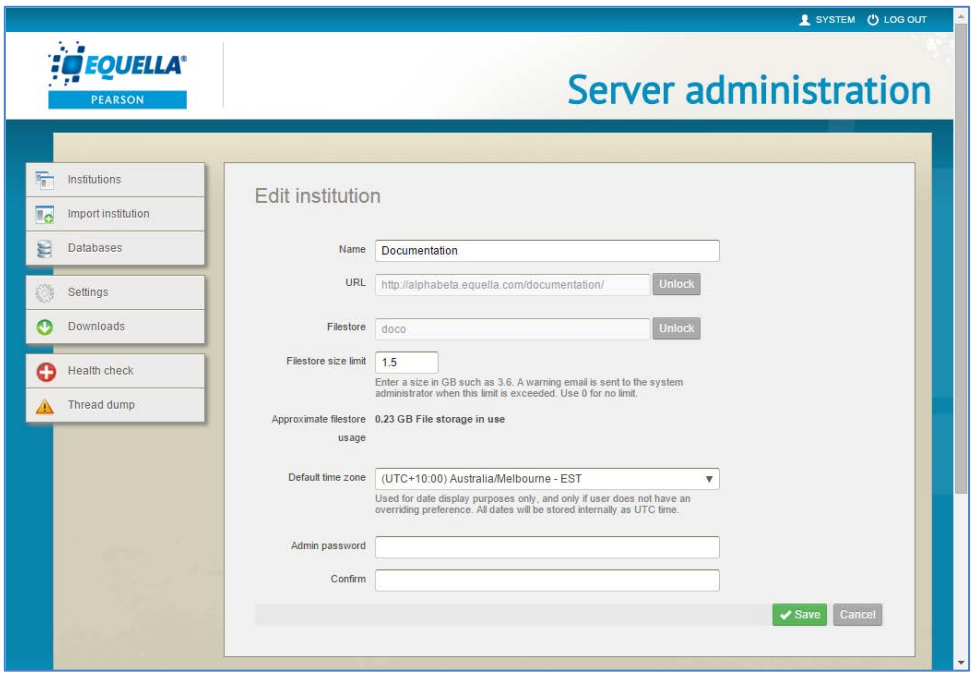

Figure 39 Edit institution page

Administrators can enter the required **Filestore size limit** in GB (e.g. 1.5). An email notification is sent to the system administrators if this limit is exceeded.

The **Approximate filestore usage** field shows the current usage.

When filestore size limits are set, the **Health check** page also displays filestore usage information. An example is shown in Figure 40.

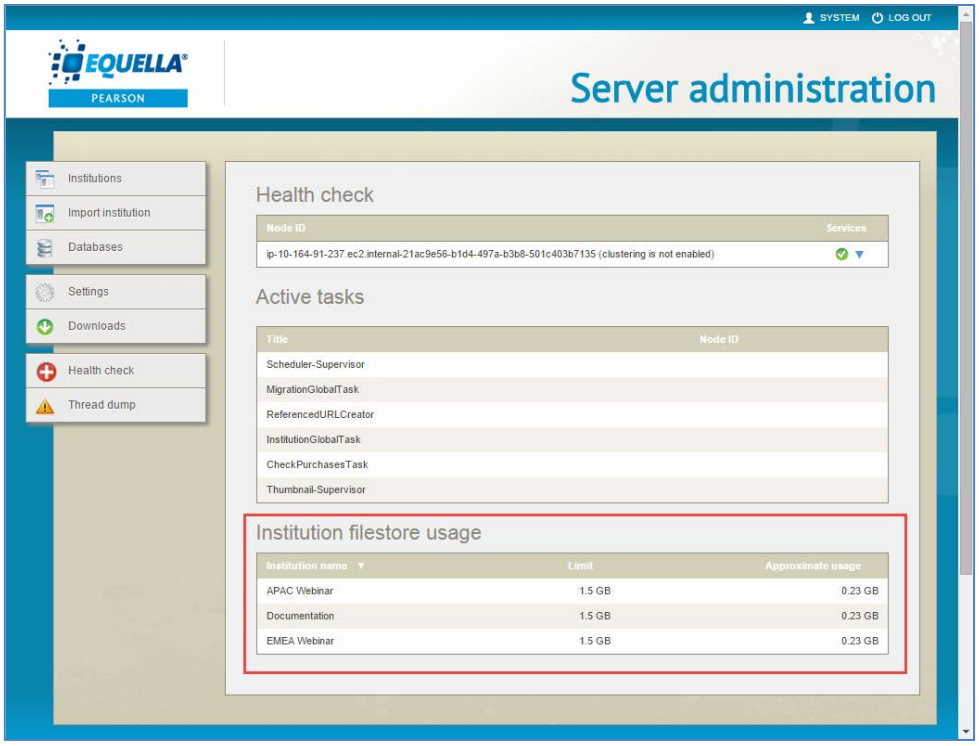

Figure 40 Health check page - Institution filestore usage

For further information, see the *EQUELLA 6.4 Installation and Administration Guide.*

LTI consumer configuration

In EQUELLA 6.4, the **OAuth1 (LTI authentication)** configuration that was included as an *OAuth flow* option in *Settings, OAuth* in prior versions, has been separated out into a new *Settings* option labelled **LTI Consumer.** Additionally, the **LTI role mappings** page (also accessed from Settings in EQUELLA 6.3) has been incorporated into the same function. A number of new configuration options have been introduced, to both match the Shared Secret functionality and enable more detailed role mapping.

After upgrading to EQUELLA 6.4, previously existing *OAuth1 (LTI authentication)* registrations display in the new **LTI Consumer** option, accessed from the *Settings* page. An example is shown in Figure 41.

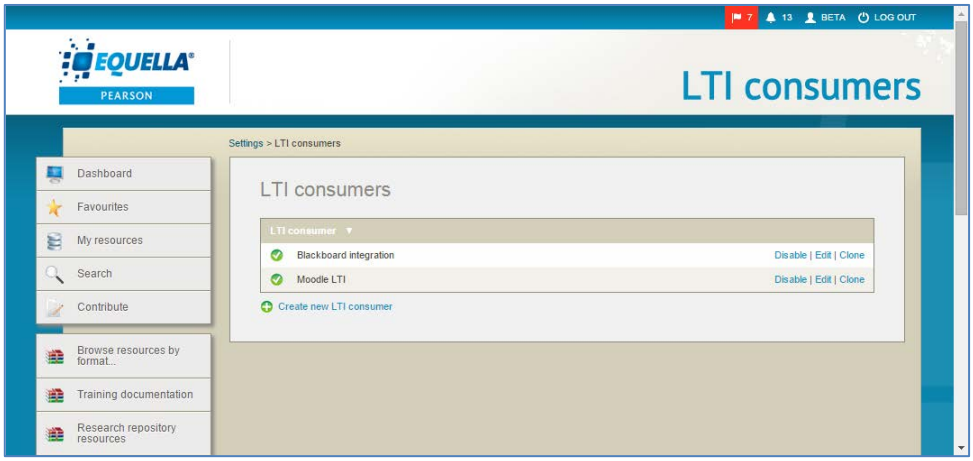

Figure 41 Settings - LTI consumers page

Users who have the equivalent OAuth privileges will automatically inherit the new CREATE_LTI_CONSUMER, EDIT_LTI_CONSUMER and DELETE_LTI_CONSUMER after the upgrade.

LTI consumer configuration options

A number of configuration options have been added to create parity with Shared Secret functionality.

A detailed mapping section allows administrators to map both standard LTI roles and custom roles to existing EQUELLA roles. An example is shown in Figure 42.

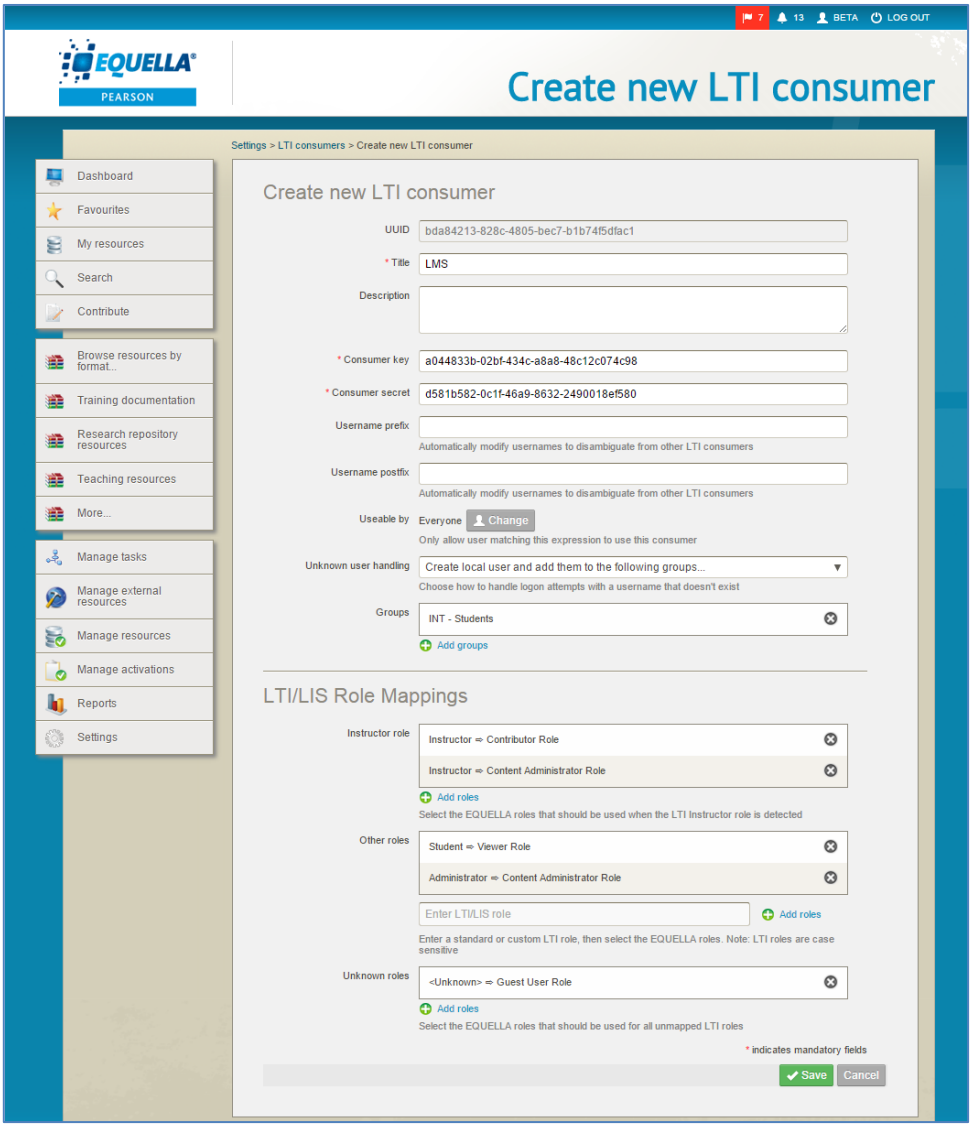

Figure 42 Edit LTI consumer page

New options include:

- **Username prefix** – users can enter a prefix value that is added to the front of usernames to distinguish from other LTI consumers
- **Username postfix** – users can enter a postfix value that is added to the end of usernames to distinguish from other LTI consumers
- **Usable by** – administrators can select specific users, groups and/or roles that can use this LTI consumer registration.
- **Unknown user handling –** choose how to handle logon attempts with a username that doesn't exist in EQUELLA. Options are:
  - **Deny access and present error message**
  - **Treat user as a guest**
  - **Create local user and add them to the following groups…** - choosing this option displays a link to a group selector.

- **LTI/LIS Role Mappings** – this section enables standard LTI roles as well as other custom roles to be mapped to roles within EQUELLA. Included are:
  - **Instructor role** – click the **Add roles** link to select the EQUELLA role/s to which the Instructor role should be mapped.
  - **Other roles** – enables LTI and custom roles (other than the Instructor role) to be mapped to the required EQUELLA role/s. Typing a minimum of two characters in the **Enter LTI/LIS** role text field displays a list of standard LTI roles to select. Alternatively, if the source role is not a standard role, the role name can be entered in the field. Note that is must be an exact match to the source role (case sensitive and spelling). Once the source role is selected, click the **Add roles** link to select the EQUELLA role/s.
  - **Unknown roles** – click the **Add roles** link to select the EQUELLA role/s to be used for all unmapped LTI and custom roles.

See the *EQUELLA 6.4 LTI Consumer Configuration Guide for further details.*

Online help for scripting

In the EQUELLA 6.3 release, scripting shortcuts were introduced. Those shortcuts are now available to view from the script editors within EQUELLA. To display the list of shortcuts, hover the mouse over the **View available shortcuts** text showing on the script editor page. An example is shown in Figure 43.

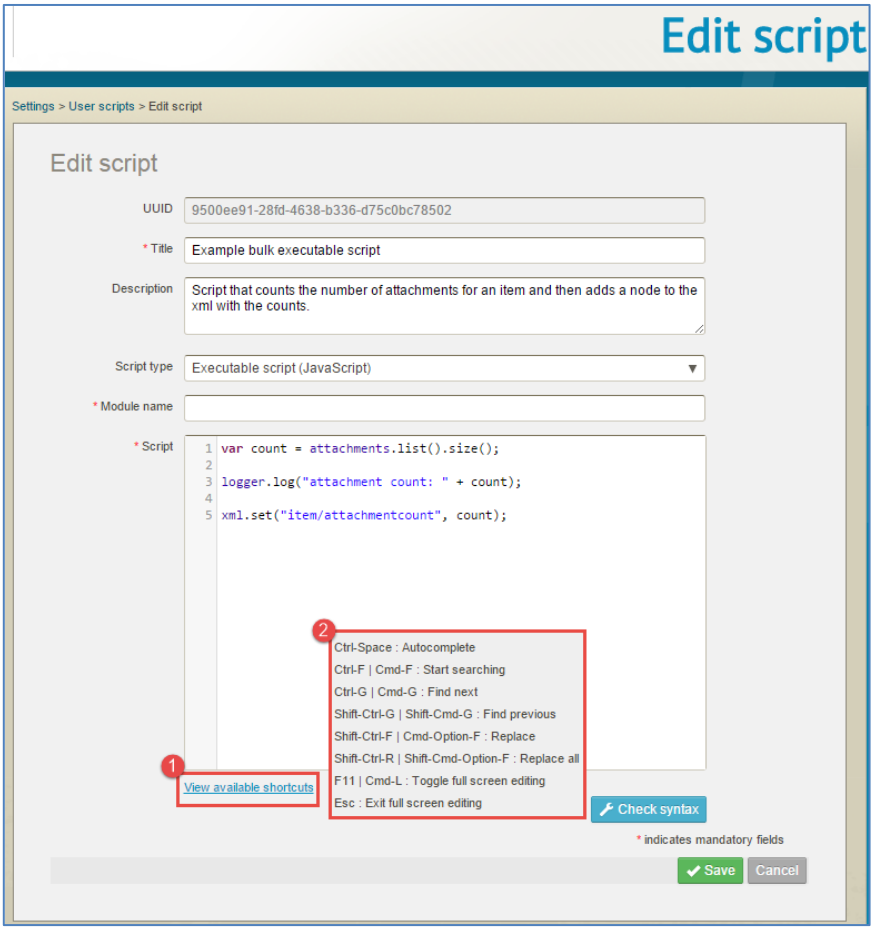

Figure 43 Script editor shortcuts

Push to LMS restriction

EQUELLA 6.4 sees the introduction of a new privilege, **EXPORT_TO_LMS_ITEM**, which, used in conjunction with the existing EXPORT_VIA_CONNECTOR privilege, allows administrators to restrict which resources can be added to external systems (LMSs), and can be set at *Collection*, *Resource Status* , *Resource Metadata rule* and *individual resource* levels.

After updating to EQUELLA 6.4, all users will be granted this privilege. Administrators will need to configure the privilege based on the requirements of the institution. When this privilege is not granted, the **Add to external system** option will not display in the **Actions** menu on the Resource summary page for affected resources.

Reporting enhancements

To assist report writers creating reports against the EQUELLA database, an interactive EQUELLA 6.4 database map is available with the 6.4 release. Additionally, EQUELLA 6.4 also provides the ability for reports to be produced in MS Word format.

Interactive database map

An EQUELLA 6.4 database map is available as part of the 6.4 release to assist those users who create reports to navigate and understand the EQUELLA database structure. This interactive map provides a snapshot of the EQUELLA database, and information about its tables and table relationships, constraints, columns and other details.

Text has been added to some of the table comments to explain what type of information is stored in tables that have unobvious titles.

The EQUELLA database map (*equella_schema.zip*) is available to download from the EQUELLA 6.4 Software page. Once the file is upzipped, open **index.html** to explore the EQUELLA database.

An example of the details of the **item_definition** table is shown in Figure 44.

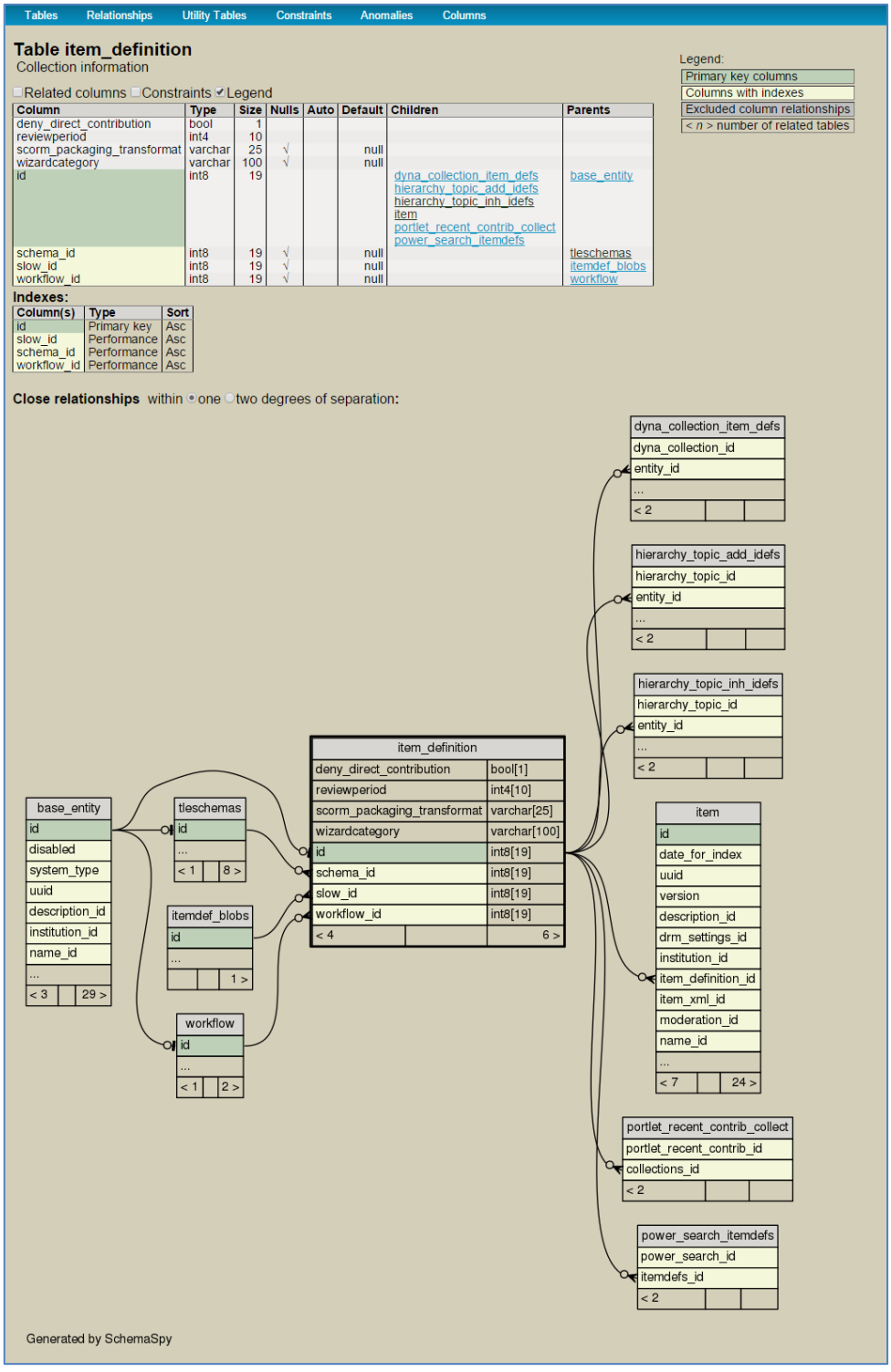

Figure 44 Interactive database map – item_definition table details

Word output for reporting

Users can now select **Word** as an output format for reports (from the **Show as…** drop-down on the reporting page). Selecting this option downloads a .doc file that can then be opened in MS Word. An example is shown in Figure 45.

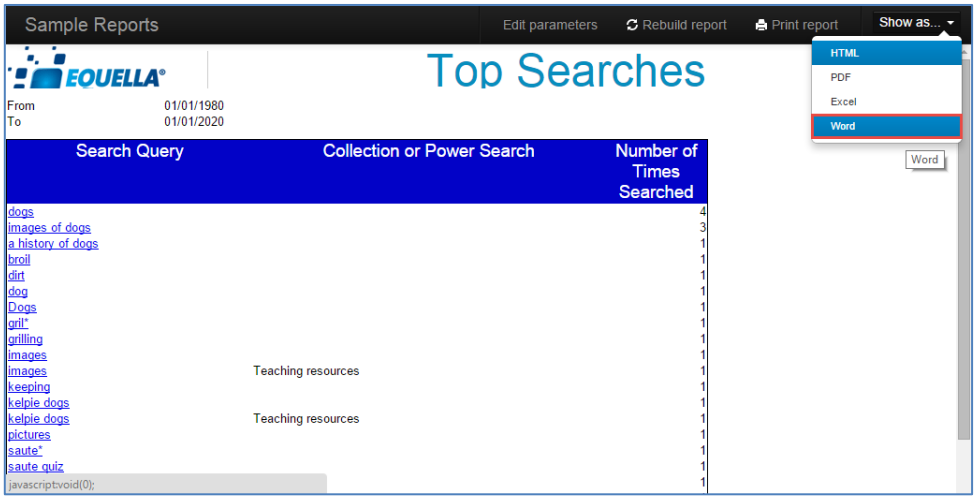

Figure 45 Word option in Show as... drop-down

Search enhancements

A number of enhancements to EQUELLA's search functionality have been added in 6.4. These include:

- Immediate display of search suggestion results once selected – see Immediate display of search suggestion on page 41.
- Ability to default the Show attachments icon to open or closed – see Ability to default Show attachments icon to open on page 42.
- Sort by creation date – see Sort by creation date on page 45.
- Multiple image indicator for Images view – see Multiple image files on page 30.
- Video view – see Videos view page on page 25.

Immediate display of search suggestion

In versions prior to EQUELLA 6.4, when a user starts typing a search term in the search edit box and resource title suggestions show, when clicking the required suggestion the user then had to click to view the selected result/s. EQUELLA 6.4 removes the requirement to click , displaying the selected result/s as soon as the user clicks on the suggestion. Examples are shown in Figure 46 and Figure 47.

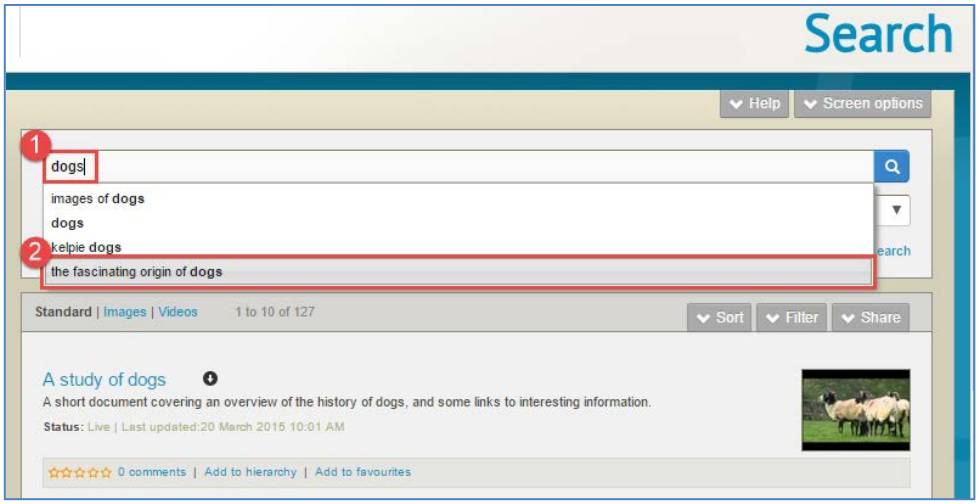

Figure 46 Search term with matching suggestions

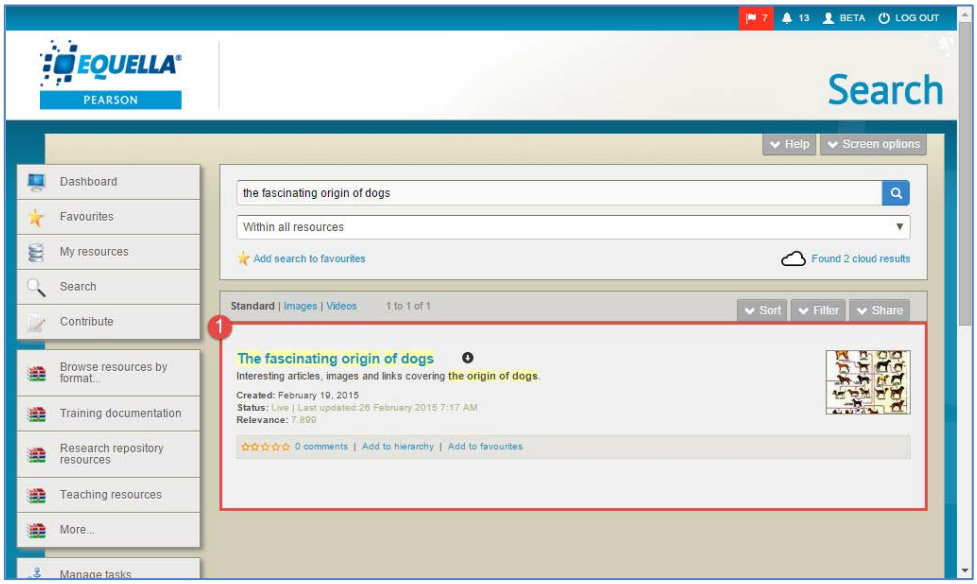

Figure 47 Matching results for selected suggestion

Ability to default Show attachments icon to open

The **Show attachments** icon that displays to the right of the resource name on results pages in EQUELLA can now be configured at a collection level for both native EQUELLA and integration screen results pages to default to *open* or *closed*. An example of a native EQUELLA result page with the icon defaulted to closed is shown in Figure 48.

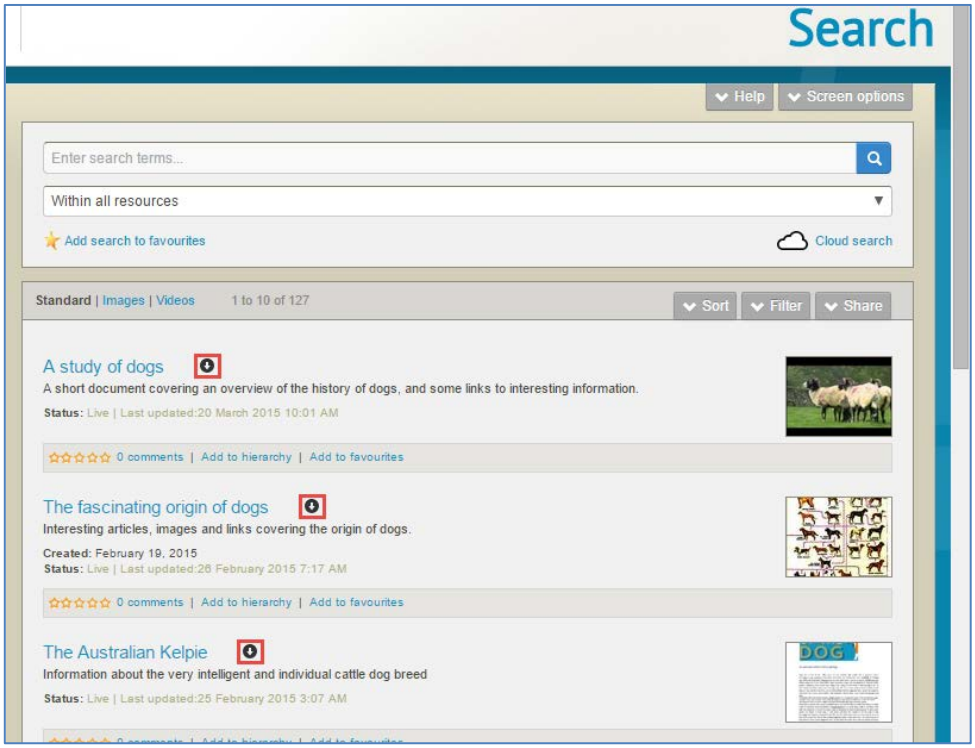

Figure 48 Results page with Show attachments icon defaulted to closed

An example showing the Integrations screen Search results page with the **Show attachments** icon defaulted to *open* is shown in Figure 49.

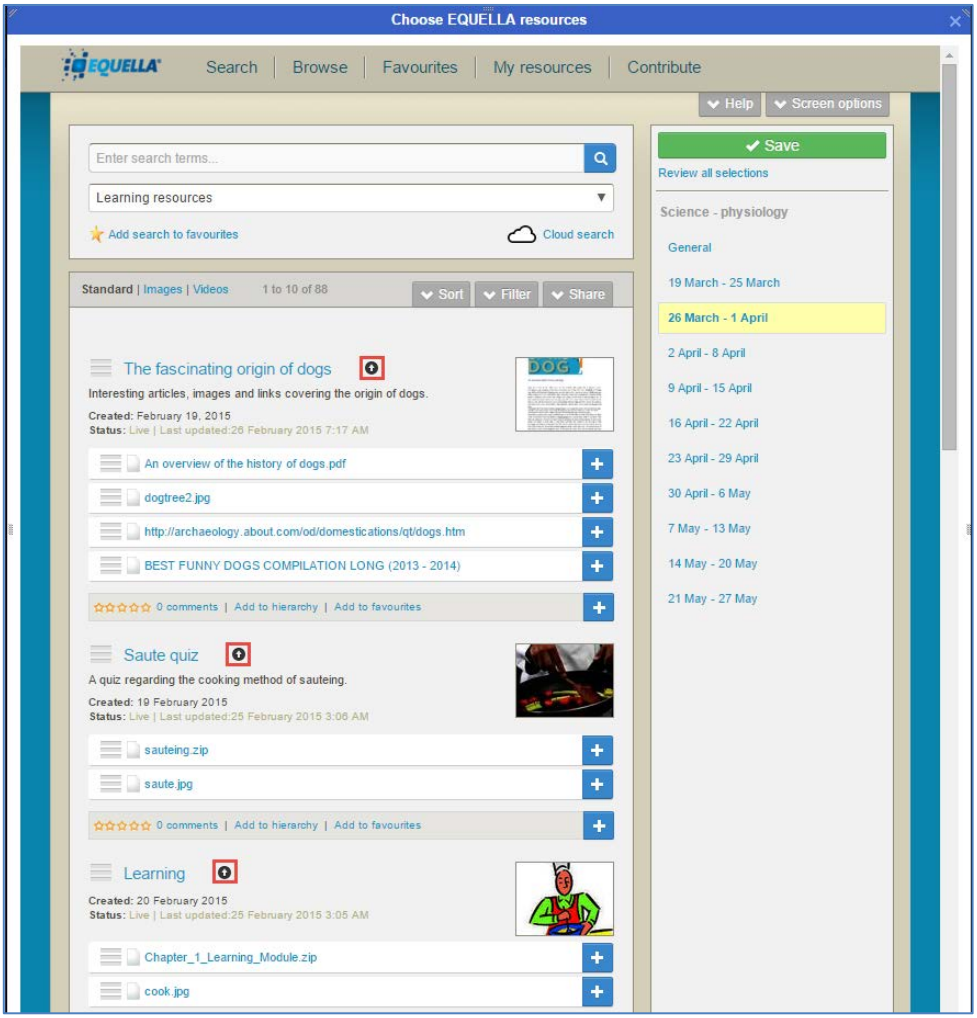

Figure 49 Example of a Moodle / EQUELLA integration screen with the Show attachments icon defaulted to open

This granularity allows administrators to set the default value for the icon to be *open* for some collections and not others, taking into account the average number and type of attachments typical to those collections.

Additionally, they could set the default value for the icon to be *open* to display attachments automatically on integration screen results pages to improve the resource selection process for those who add resources to LMS courses, but leave it as *closed* on the searches within native EQUELLA.

The new **Show attachments** icon default value options are configured from the *Collection Definition Editors Display* tab, on the *Search Results Template sub-tab*. An example is shown in Figure 50.

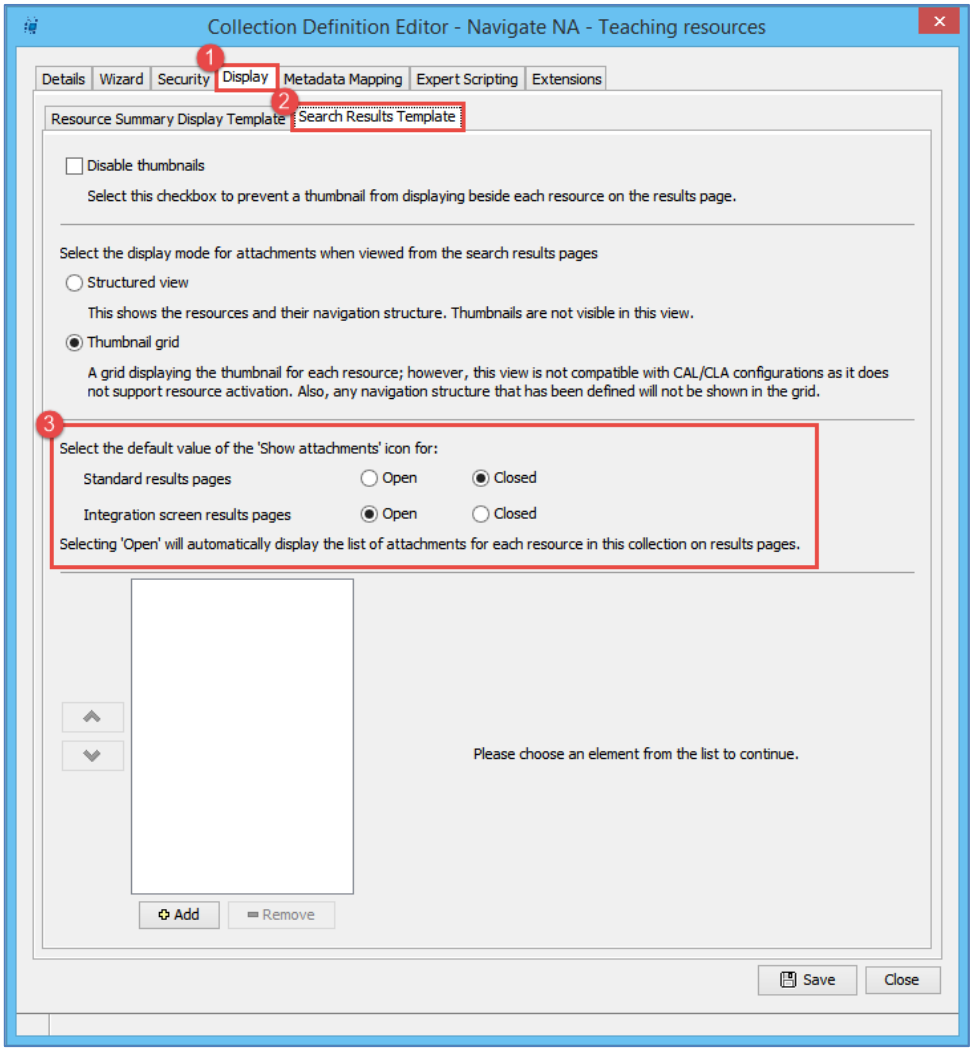

Figure 50 Show attachments default options

For further information, see the *EQUELLA 6.4 Collection Definitions Guide.*

Sort by creation date

Date created has now been added as a value in the Sort drop-down for all results pages. When selected, resources display based on the date they were created. An example is shown in Figure 51.

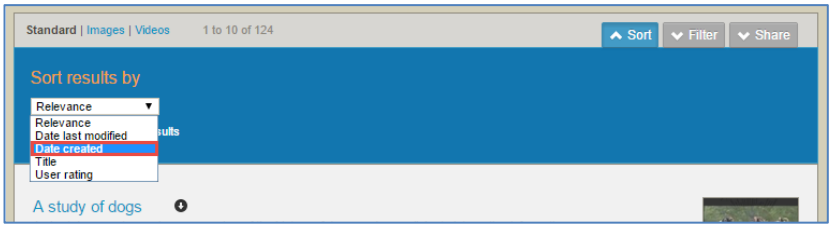

Figure 51 Sort drop-down - Date created option

Term Selector

In EQUELLA 6.4, a user no longer needs to click the Select button after selecting a taxonomy result from the Auto-complete edit box drop-down list of a Term selector control. The selected result will be added to the table immediately.

A user selects the required term from the taxonomy results list. An example is shown in Figure 52.

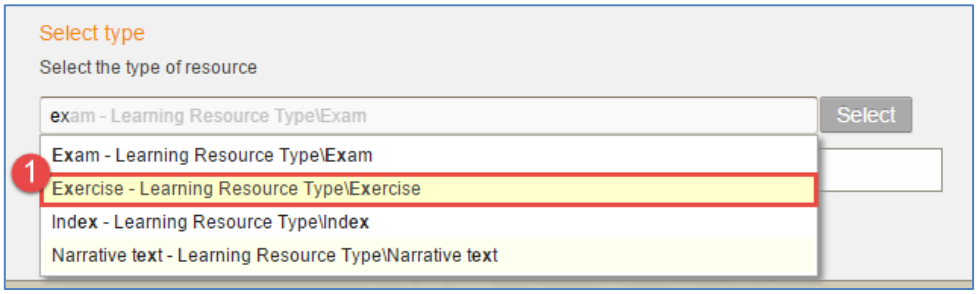

Figure 52 Auto-complete edit box results list

The selected result is immediately added to the selection list (without needing to click the Select button). An example is shown in Figure 53.

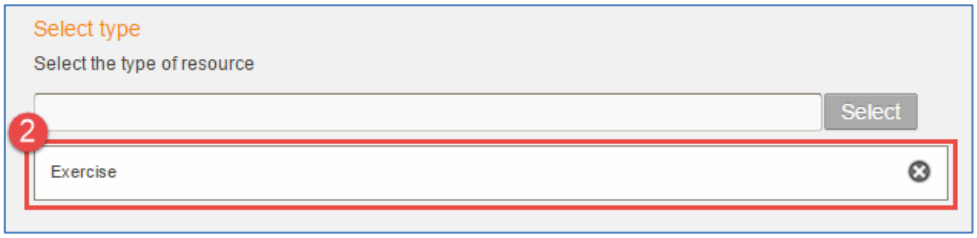

Figure 53 Selected result added without clicking the Select button

View attachment privilege

In EQUELLA 6.4, the new VIEW_ATTACHMENTS privilege allows administrators to restrict users that are provided a link to an attachment stored in EQUELLA to access only that attachment, and not the item metadata or list of attachments for that item.

For example, an administrator may wish to prevent students from being able to manipulate an attachment URL provided to them in an LMS course to gain access to the attachment's associated Resource summary page. To achieve this, the administrator would revoke (or not grant) VIEW_ITEM and DISCOVER_ITEM for the relevant users, groups or roles, but grant VIEW_ATTACHMENTS. If access to the Resource summary page is attempted, an **Access denied** message displays and the user is prevented from viewing the page. An example is shown in Figure 54.

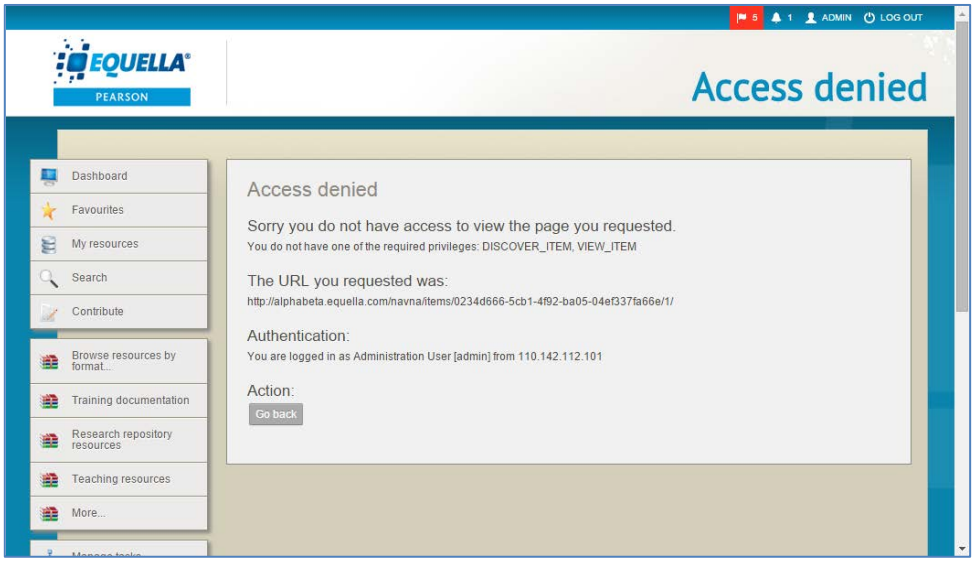

Figure 54 Access denied message

Z39.50 configuration enhancements

The **Z39.50** Remote Repository type has been updated to allow administrators to configure desired advanced search fields.

Advanced search fields for Z39.50 searching were hard coded in previous releases, with fields mapped to return standard values such as Title, Author, Edition etc. In EQUELLA 6.4, administrators can choose to load **EQUELLA Default**, **Bath level 0** or **Bath level 1** profiles as the default attributes. Furthermore, additional fields can be added if required.

Load default attributes

A new option on the Remote Repository Editor page (accessed from the Administration Console) allows administrators to select the search fields to be used for searching the selected library. The options are:

- **EQUELLA Default** – loads the default EQUELLA values (this is the default value).
- **Bath level 0** – loads the Bath level 0 values.
- **Bath level 1** – loads the Bath level 1 values.

To learn more about the Bath Profile, go to http://www.ukoln.ac.uk/interop-focus/activities/z3950/int_profile/bath/draft/stable1.html.

Once the required field set has been selected, the **Standard query attributes** belonging to that set display (but can be edited), and the search fields and their attributes display in the table at the bottom of the screen. An example is shown in Figure 55.

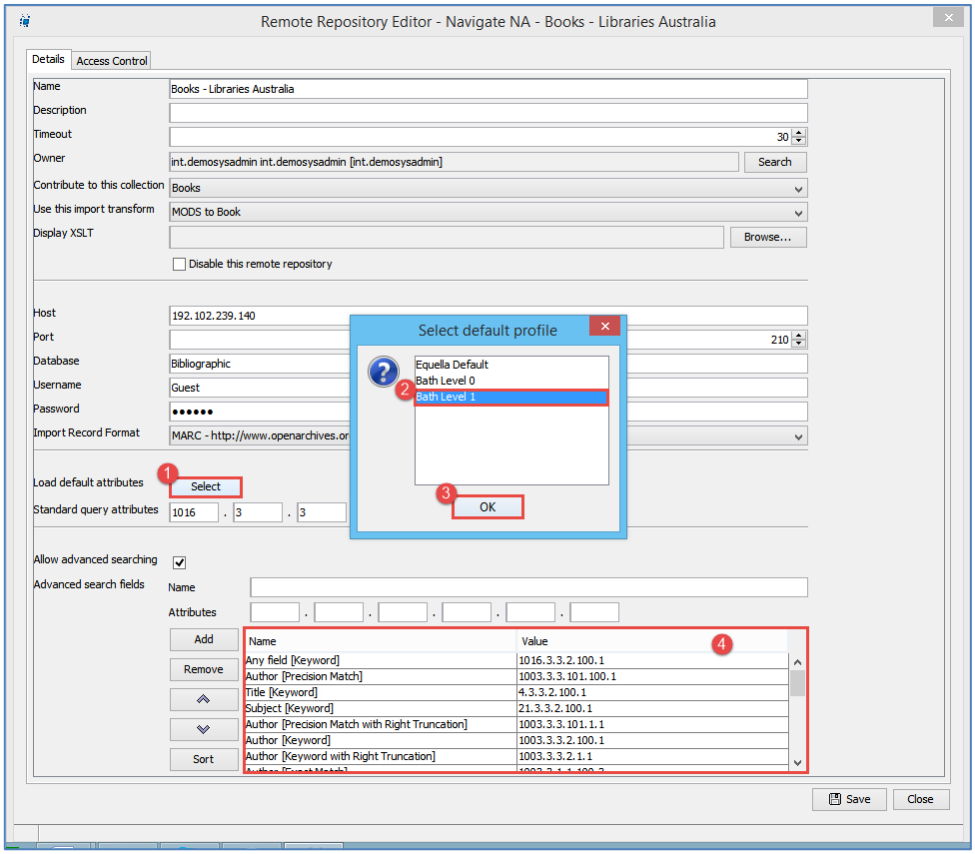

Figure 55 Remote Repository Editor - Z39.50 - Load default attributes – Bath Level 1

Adding additional search fields

Additional search fields and their attributes can be added to the table then used when searching the repository from the Search page (when **Allow advanced searching** is enabled).

A user can add a custom field by typing in the field **Name** and associated **Attributes,** then clicking Add. For information regarding Z39.50 attributes, see http://www.loc.gov/z3950/agency/defns/bib1.html.

An example is shown in Figure 56

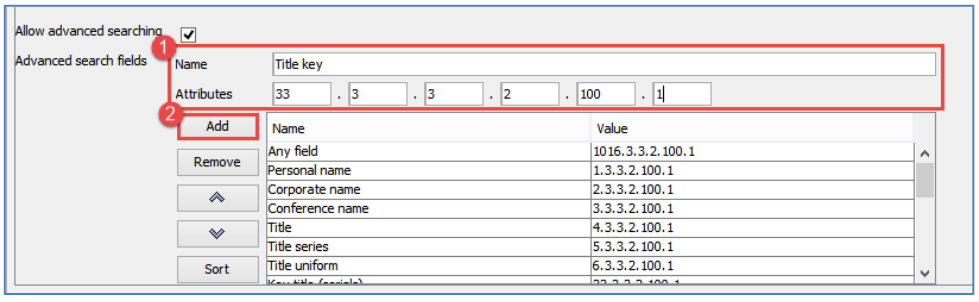

Figure 56 Add an Advanced search field

The new search field is then added to the table, and appears as a search field on the Z39.50 search option from the Search page. An example is shown in Figure 57.

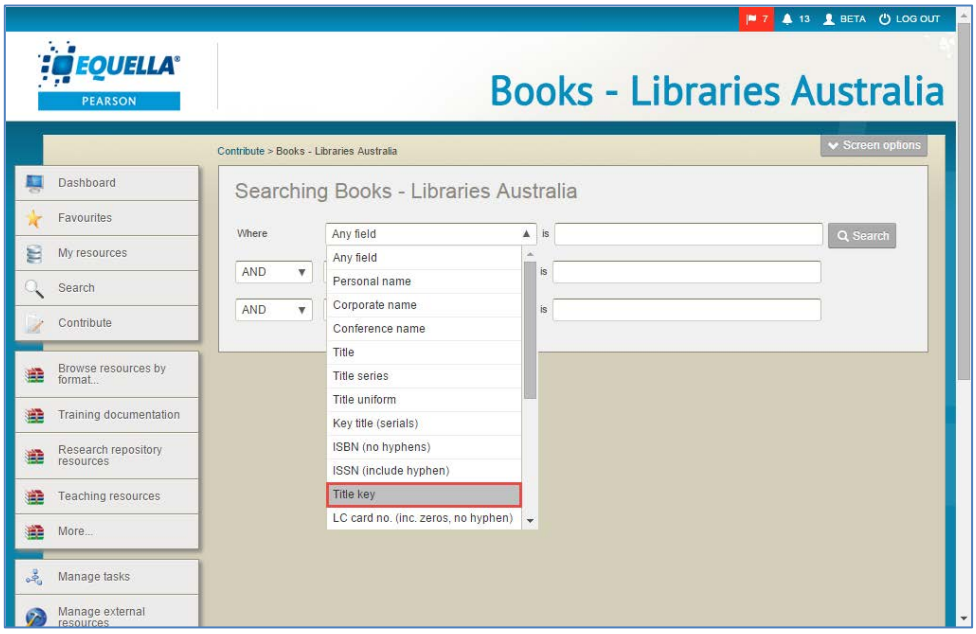

Figure 57 Z30.50 Remote Repository search - with Title key search field

For further information, see the *EQUELLA 6.4 Remote Repositories Configuration Guide.*

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.