

EQUELLA[®]

My Resources User Guide

Version 6.0

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My Resources overview

An EQUELLA resource typically comprises metadata (information) and one or more attachments uploaded during contribution. When a resource is displayed, important elements of its metadata are shown along with links to attachments. Modifications to a resource comprise modification of the metadata or the addition or removal of attachments.

EQUELLA resources are typically managed by system administrators, content administrators and resource owners. The system administrator manages all institution resources while content administrators manage those resources which are relevant to their role in the organisation. Resource owners manage their contributed or shared resources.

The purpose of this guide is to demonstrate to resource owners the management options for their resources. The options available to the resource owners depend on the privileges configured by the system administrator. The *EQUELLA Manage Resources Guide* provides resource management information for administrators.

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

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. The EQUELLA Dashboard displays. An example is shown in Figure 1.

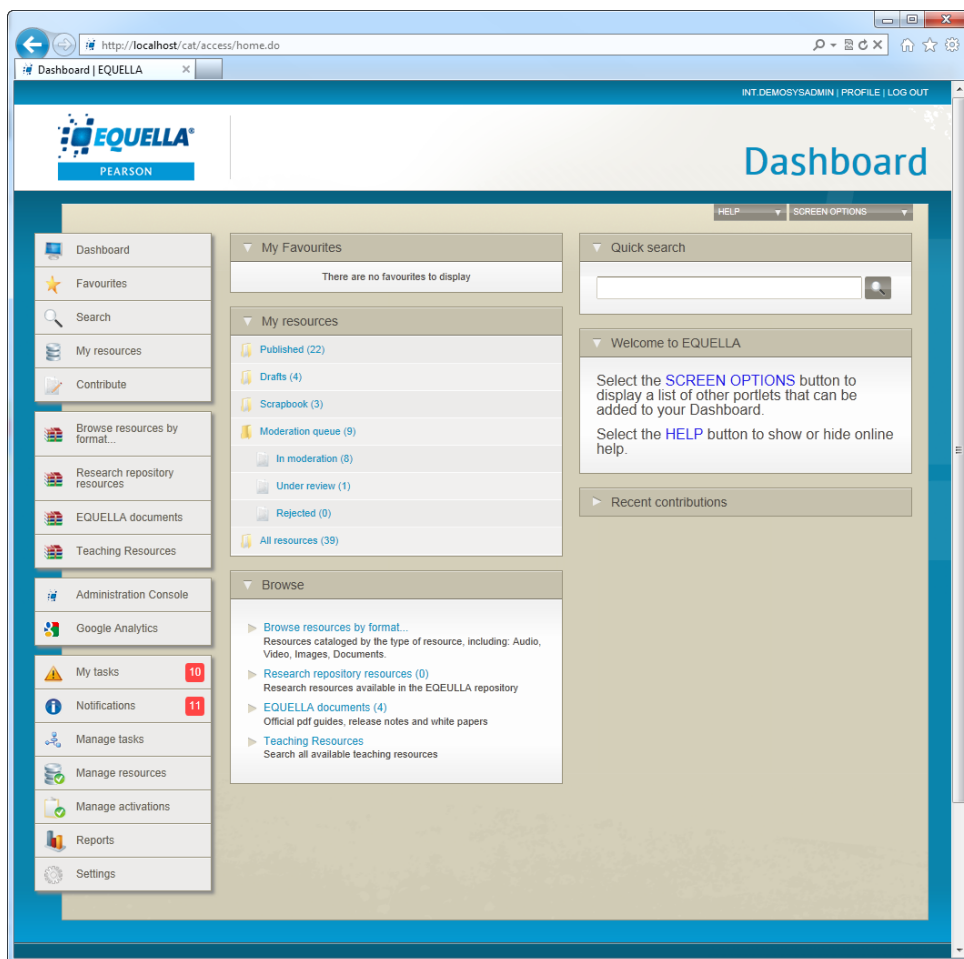


Figure 1 EQUELLA Home page

The EQUELLA Digital Repository allows users to search, create, store, manage, view, and share content.

What is a resource?

Resources are published content that are stored in an area of the EQUELLA Digital Repository called **My resources** and are available to other users (depending on their access permissions). Resources are contributed to a customised collection using a contribution wizard. This process can be simple or it can involve sophisticated workflows, have associated digital rights, copyright compliance and version control.

Users can find resources stored in the EQUELLA Digital Repository by browsing or using search criteria. The user can then share the resources with other users or bookmark them in **Favourites**.

Further information on contributing resources is provided in the *EQUELLA Contribution User Guide*.

Resource status

Every resource in the EQUELLA repository has a **Status**. A resource's status can determine filtering and viewing options, and which actions are allowable on that resource. EQUELLA resource statuses are described below:

- **live**—resources that have been published to the repository after being moderated, or that belong to a collection that does not require moderation.
- **draft**—resources that are under construction and have not yet been published or submitted for moderation.
- **suspended**—resources that have been *live* but are temporarily removed from the repository and hidden from searches.
- **archived**—resources that have been *live* but are no longer required. For example, resources that have been superseded by a newer version.
- **deleted**—resources that have been removed from the repository and are marked for purging with the next purge scheduled task.
- **moderating**—resources that have entered a workflow and require moderation before being made *live*.
- **review**—resources that have re-entered a workflow in order to be checked for currency, while remaining discoverable by searches.
- **rejected**—resources that have been rejected from a workflow. These resources must be redrafted and resubmitted for moderation to re-enter the workflow.

My resources

Every resource in the EQUELLA repository is assigned an owner, with the owner typically being the resource's creator or contributor. Owners are typically given privileges to maintain their own resources, such as the ability to modify, create versions and assign users for sharing ownership.

To view or manage your resources

1. Select **My resources** from the navigation menu, as shown in Figure 2.

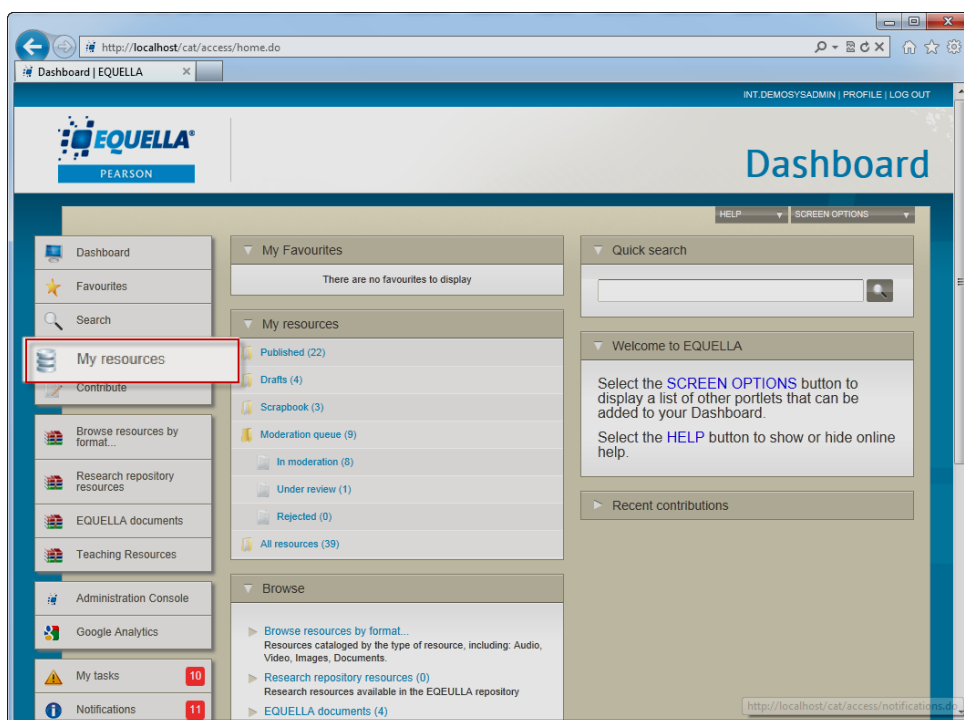


Figure 2 My resources menu item

The **My resources** page is displayed. An example is shown in Figure 3.

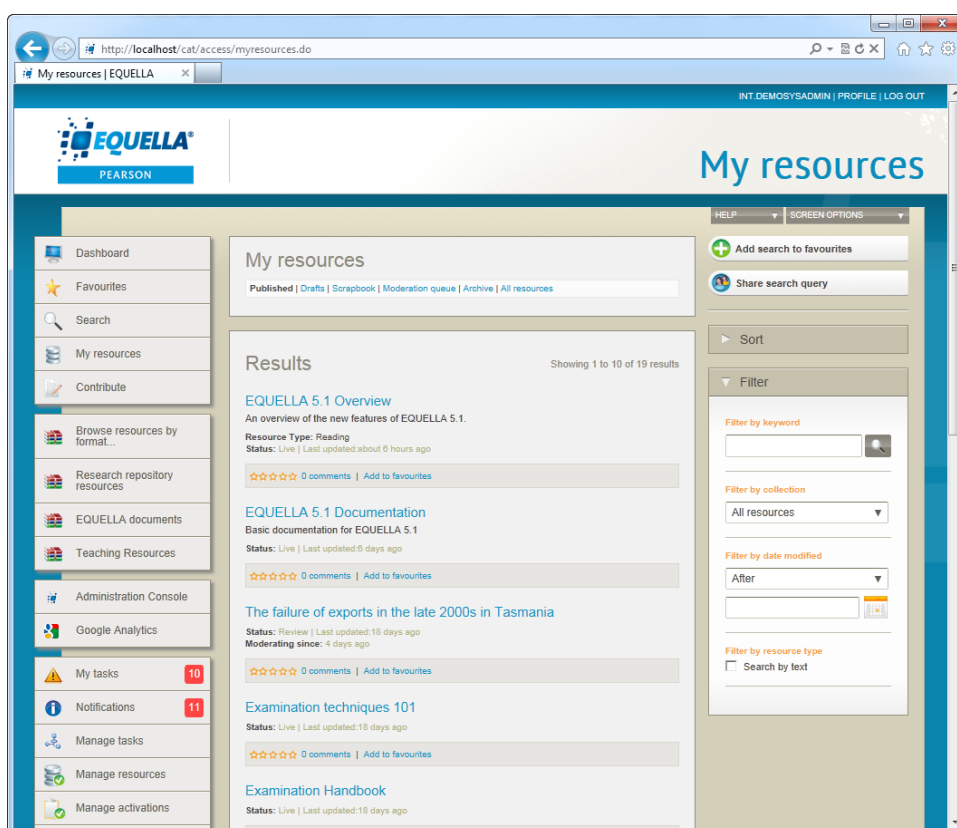


Figure 3 My resources page

Resources can be displayed according to their workflow status, resource status or type. Links are displayed across the top of the page, with the current selection shown in black and the others in blue. An example with **Published** resources selected is shown in Figure 4.

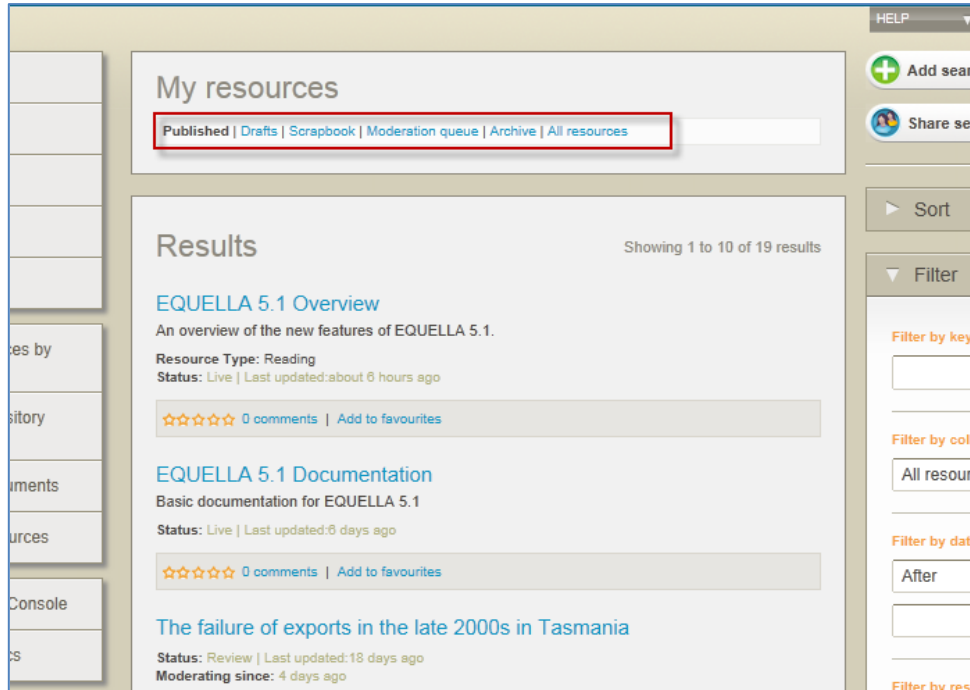


Figure 4 My resources grouping links

Select a link to change the results displayed. Available links are:

- **Published**—displays resources that are in a *live* state through having been moderated or through belonging to a collection that does not require moderation. Additionally, resources with a status of review are displayed, and are live resources which are due for review.
- **Drafts**—resources that are under construction.
- **Scrapbook**—displays personal files or web pages belonging to the user. These items have not been published to the EQUELLA Digital Repository, and they cannot be viewed, edited or deleted by other users. See the [Scrapbook](#) section on page 36 for more information.
- **Moderation queue**—resources that have been submitted for moderation, and are still at some point in the moderation workflow. See the [Moderation queue](#) section on page 47 for more information.
- **Archived**—resources that have been *live* but are now superseded by a new version. These resources are no longer available to repository users other than the resource owner and the system administrator.
- **All resources**—all the resources the user owns or has permission to view.

Refer to the *EQUELLA Workflow User Guide* for more information on workflow moderation.

My resources results page

When the My resources page is first opened, the default view is Published resources. An example is shown in Figure 5.

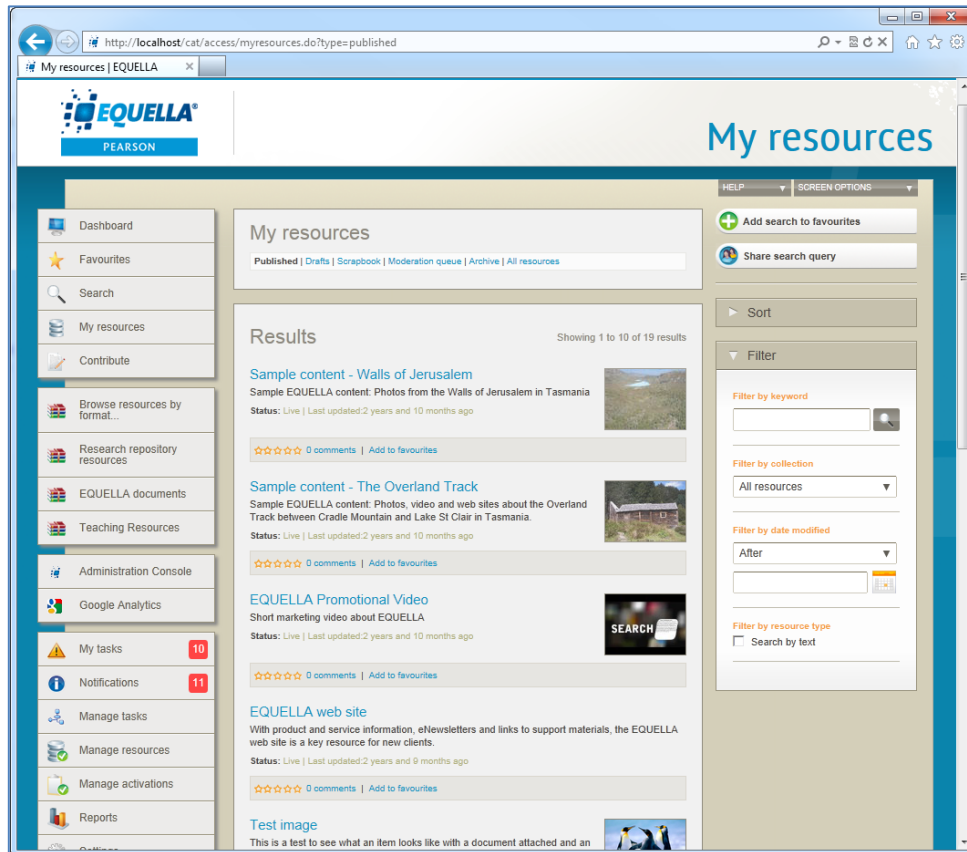


Figure 5 My resources results page

Results can be displayed in groups of 10, 50 or 100 per page, with paging displayed at the end of the search results page. The number of results per page can be changed by clicking **SCREEN OPTIONS** on the top right of the page then selecting the required number from the **Number of results per page** drop-down list.

Information displayed for each resource listed can include:

- **Title**—select this link to display the resource summary page. Further information is provided in the [Resource summary page](#) section on page 15.
- **Description**—displays the item description.
- **Status**—displays the resource status and when it was last updated. Statuses displayed can be *live*, *archived*, *deleted*, *suspended*, *review*, *moderating*, *rejected* or *draft*.
- **Last updated**—the time period since the item was last updated.
- **<x> comments**—select this link to display the resource summary page where comments and ratings can be entered. Further information is provided in the [Comments](#) section on page 19.

- **HELP** —click to display context-sensitive help at the top of the page. An example is shown in Figure 6. Depending on the context, links to other help topics can also be displayed. Click the button again to hide the help pane.

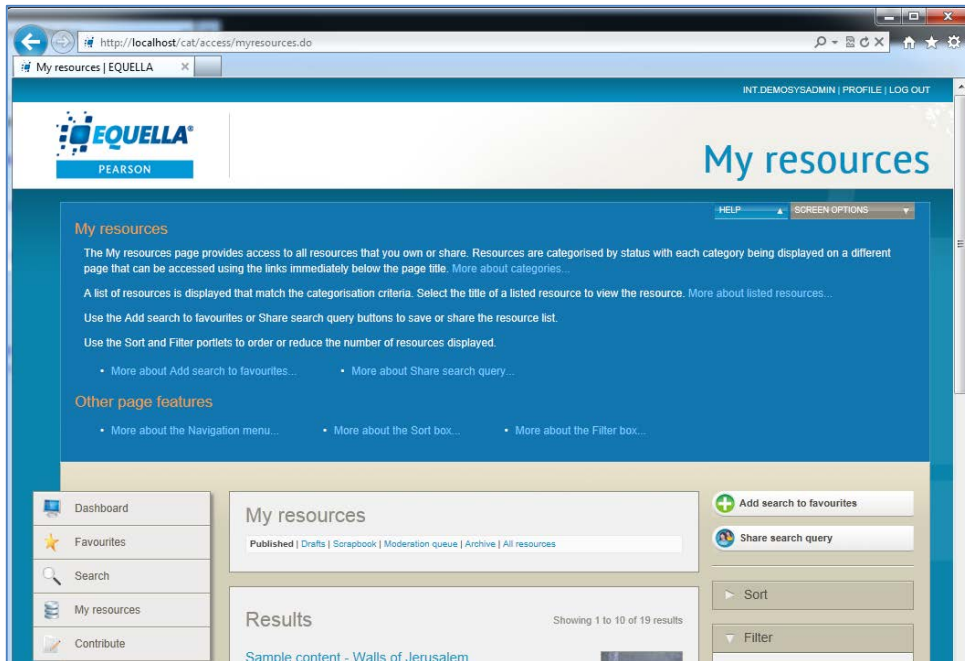


Figure 6 Help example

- **SCREEN OPTIONS** —click to display the screen configuration option:
 - **Number of results per page**—select how many results (10, 50 or 100) are displayed per page from the drop-down list.

Add search to favourites

Clicking the **Add search to favourites** button on the right-hand side of the page displays the **Add search to favourites** dialog where a name is entered to help identify the search. An example is shown in Figure 7.

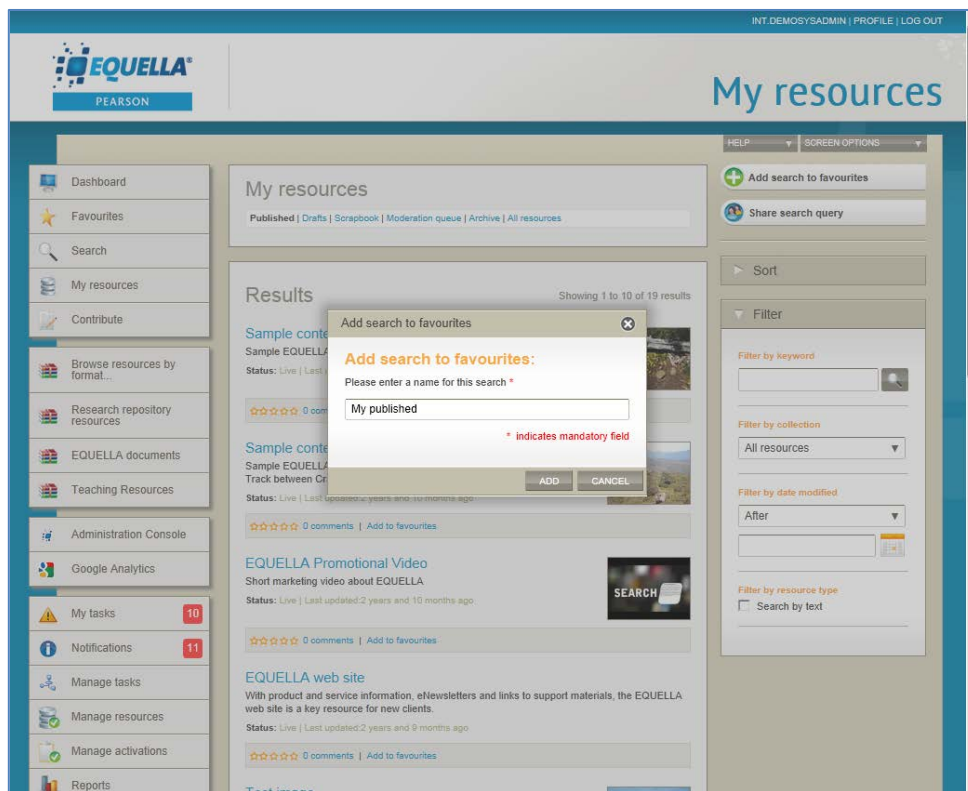


Figure 7 Add search to favourites dialog

Clicking **ADD** displays a *'Successfully added this search to your favourites'* message and adds the search to your Favourite searches list.

Share search query

Search results can be shared with other users by sending them the search results for their use.

Share search query button

Clicking **Share search query** on the right-hand side of the page displays the **Share search query** dialog where results can be shared by: RSS or Atom feed, via URL and via e-mail. An example is shown in Figure 8.

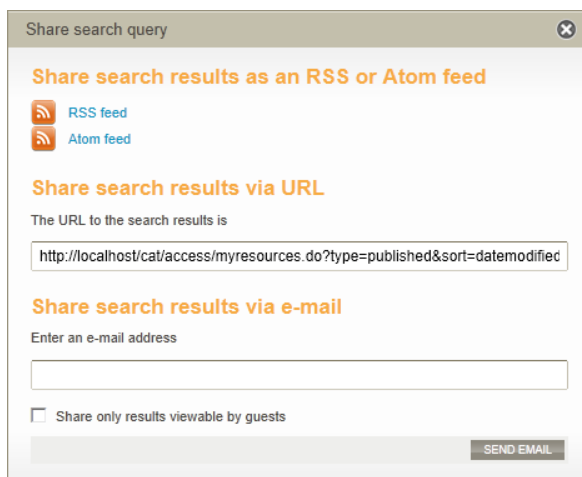

A dialog box titled "Share search query" with a close button (X) in the top right corner. It contains three sections: "Share search results as an RSS or Atom feed" with links for "RSS feed" and "Atom feed"; "Share search results via URL" with a text field containing the URL "http://localhost/cat/access/myresources.do?type=published&sort=datemodified"; and "Share search results via e-mail" with a text field for an email address, a checkbox labeled "Share only results viewable by guests", and a "SEND EMAIL" button.

Figure 8 Share search results dialog

- **Share search results as an RSS or Atom feed**—selecting the **RSS feed** or **Atom feed** link will display a subscription page. Subscribed users are notified if resources are updated or added to the search results.
- **Share search results via URL**—users can send a link to the search results page to other users by copying and pasting the URL into an email or other document. The EQUELLA log in page is displayed when the link is clicked. After logging in, the user is taken directly to the search results page.
- **Share search results via e-mail**—users can send results to others via email. Enter an email address in the field provided and click **SEND EMAIL**. Check the **Share only results viewable by guests** checkbox if sending to users outside your institution.

Sort results

The **Sort** box provides options for sorting the results list. Clicking the toggle  button shows or hides the box. An example is shown in Figure 9

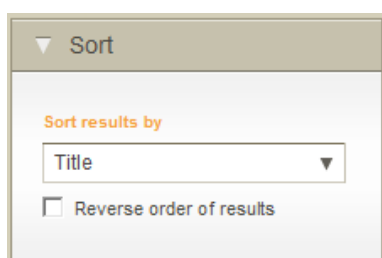
A "Sort" box with a dropdown arrow in the top left. It contains a section titled "Sort results by" with a dropdown menu currently set to "Title". Below this is a checkbox labeled "Reverse order of results".

Figure 9 Sort box

The **Sort results by** drop-down list can include **Relevance**, **Date last modified**, **Title** or **User rating**. Checking the **Reverse order of results** checkbox reverses the selected sort order, for example reversing a title ordering from A–Z to Z–A.

Filter results

The **Filter** box (as shown in Figure 10) provides options for reducing the number of displayed results.

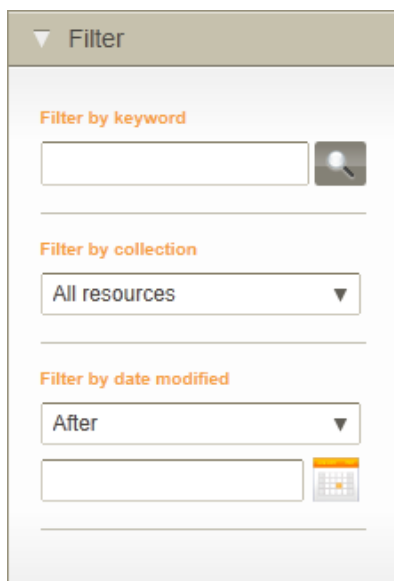
The image shows a 'Filter' portlet with a title bar containing a downward arrow and the word 'Filter'. Below the title bar, there are three sections. The first section is 'Filter by keyword' with a text input field and a magnifying glass icon. The second section is 'Filter by collection' with a dropdown menu showing 'All resources'. The third section is 'Filter by date modified' with a dropdown menu showing 'After' and a calendar icon. Below the calendar icon is another text input field.

Figure 10 Filter portlet

The following filters are included:

Filter by keyword

Enter a full word (e.g. *Tasmania*) to see resources containing that word. Enter a letter or string of letters with an asterisk (wildcard) after it (e.g. *tas**) to see resources containing that string.

Filter by collection

Select the required collection from the drop-down list to see only resources belonging to that collection.

Filter by date modified

Select a qualifier from the drop-down list (**After**, **Before**, **Between** or **On**), then click the calendar field or icon to display a calendar control. An example is shown in Figure 11.

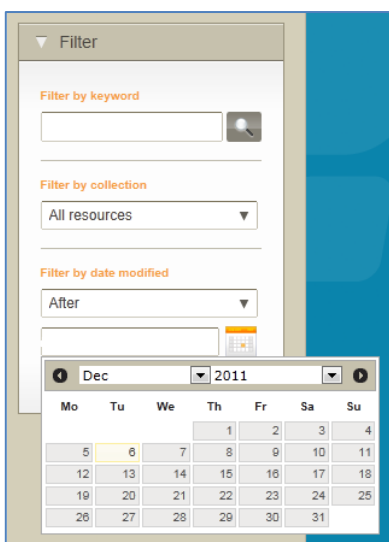
The image shows the 'Filter' portlet with the 'Filter by date modified' section expanded. A calendar control is displayed below the 'After' dropdown. The calendar shows the month of December 2011. The days of the week are listed at the top: Mo, Tu, We, Th, Fr, Sa, Su. The dates are arranged in a grid. The date 6 is highlighted in yellow. The calendar control has a title bar with 'Dec' and '2011' and a close button.

Figure 11 Calendar control

Click on the required date.

Select the **Clear** link to remove the filtering criteria. An example is shown in Figure 12.

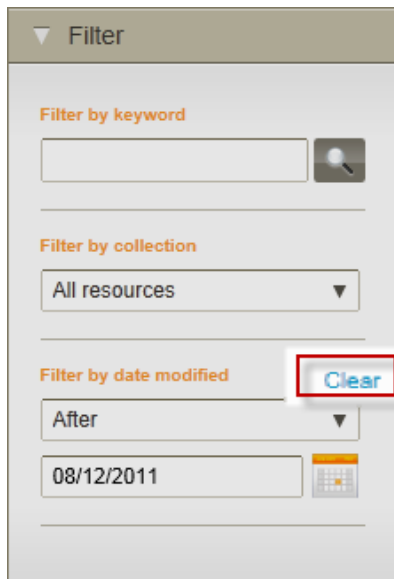


Figure 12 Filter box—Clear link

Clear filters

An 'X records have been filtered out' message is displayed when a filter has been applied to search results. An example is shown in Figure 13.

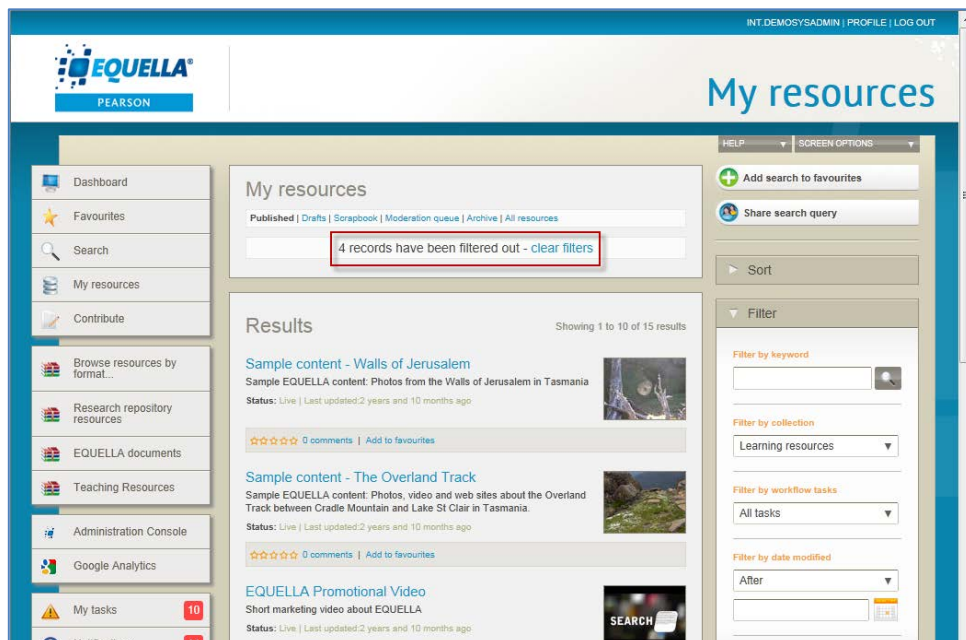


Figure 13 Clear filters message

Select the **clear filters** link to display all results.

Resource summary page

Individual resources can be accessed and viewed from the My resources results page.

To view a resource

1. Click on the resource title or thumbnail (e.g. *The Overland Track summary*). The resource summary page displays. An example is shown in Figure 14.

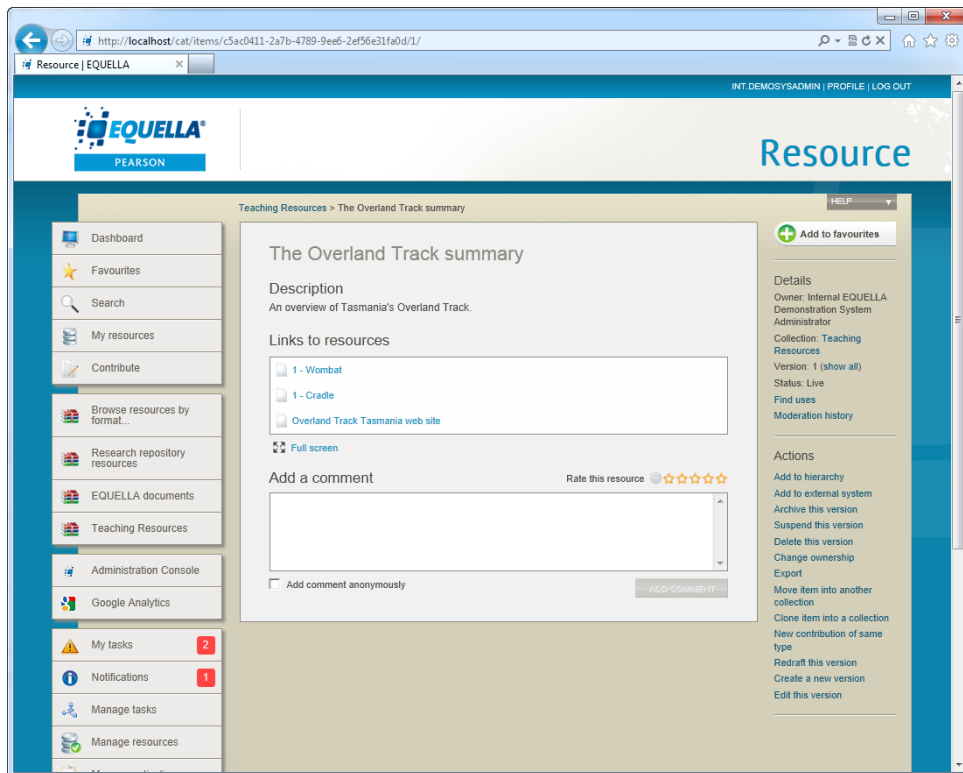


Figure 14 Resource summary page

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

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** sections links.

The appearance of the resource summary page may differ according the collection in which the resource belongs and the display template selected for that collection.

View attachments

The **Links to Resources** section displays links to attachments, thumbnail images and viewers configured to view the resources. When an attachment link is selected, the relevant screen displays, depending on the attachment type. For example, clicking on a URL link opens the associated website page, clicking on a pdf document gives the option to open the file using a pdf reader or saving the file, a YouTube link opens the YouTube website etc.

If the attachments have been packaged using the Navigation Builder during contribution, the components can be viewed separately or as a package, using the large image viewer.

Selecting the arrow to the right of the attachment link displays more information about the attachment. Information differs between attachment types. An example of a .docx attachment is shown in Figure 15.

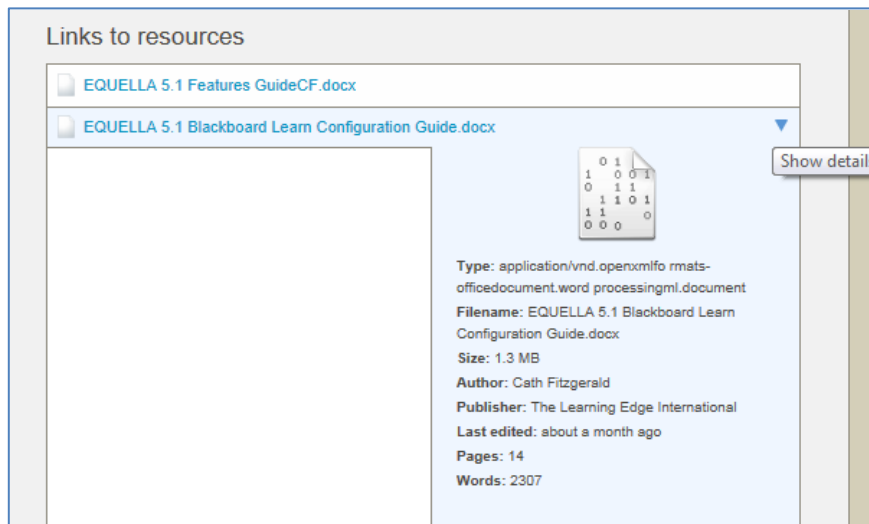


Figure 15 Show details for docx attachment

The information displayed includes *Type*, *Filename*, *Size*, *Author*, *Publisher*, *Last edited*, *Pages* and *Words*.

To display image attachments

1. Select an image attachment link to display the image in the default viewer. An example of an image file is shown in Figure 16.

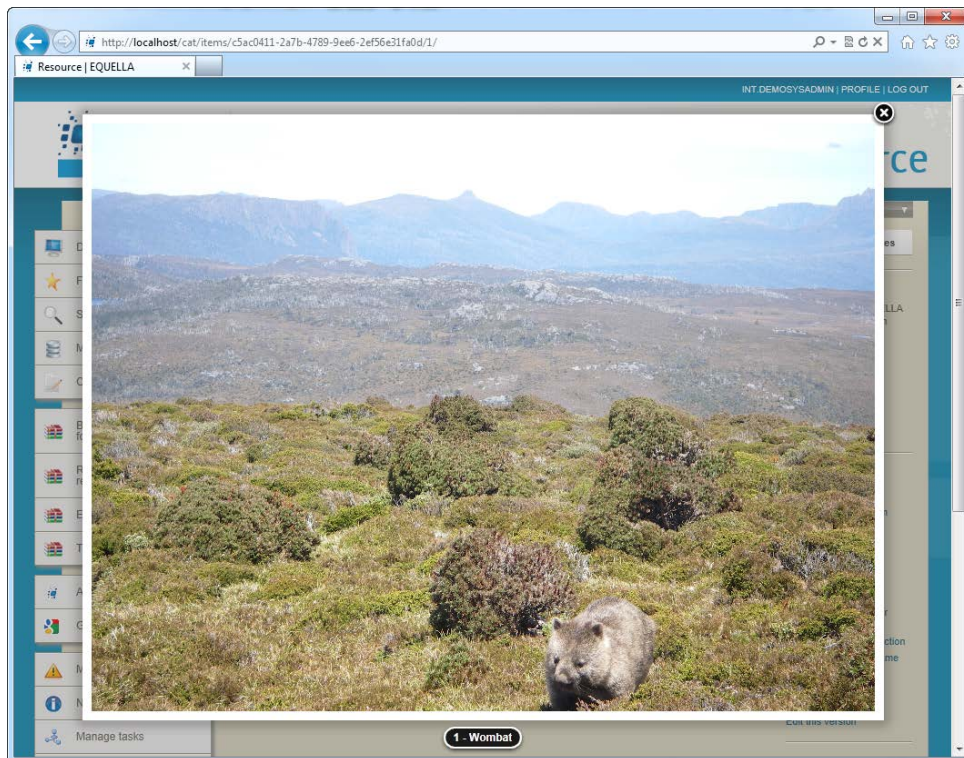


Figure 16 Image attachment displayed in default viewer

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 showing an image preview, name, type and size of attachment and viewer options. An example is shown in Figure 17.

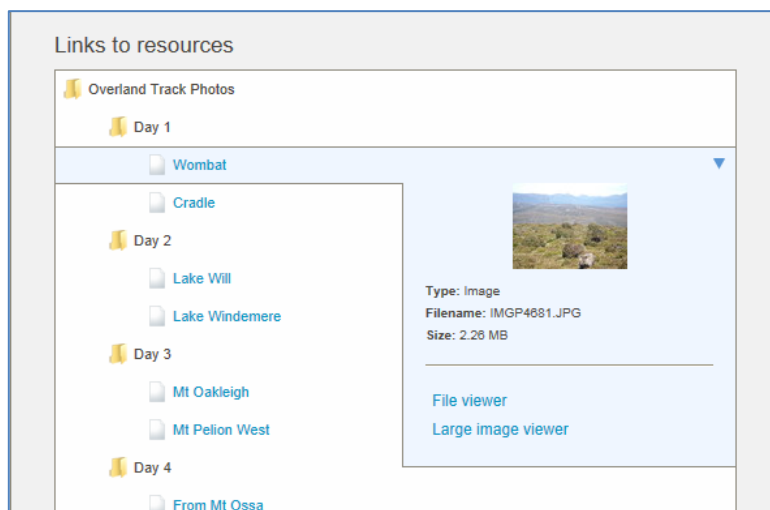


Figure 17 Attachment options

2. Select a configured viewer (e.g. **Large image viewer**) to display the attachment. An example is shown in Figure 18.

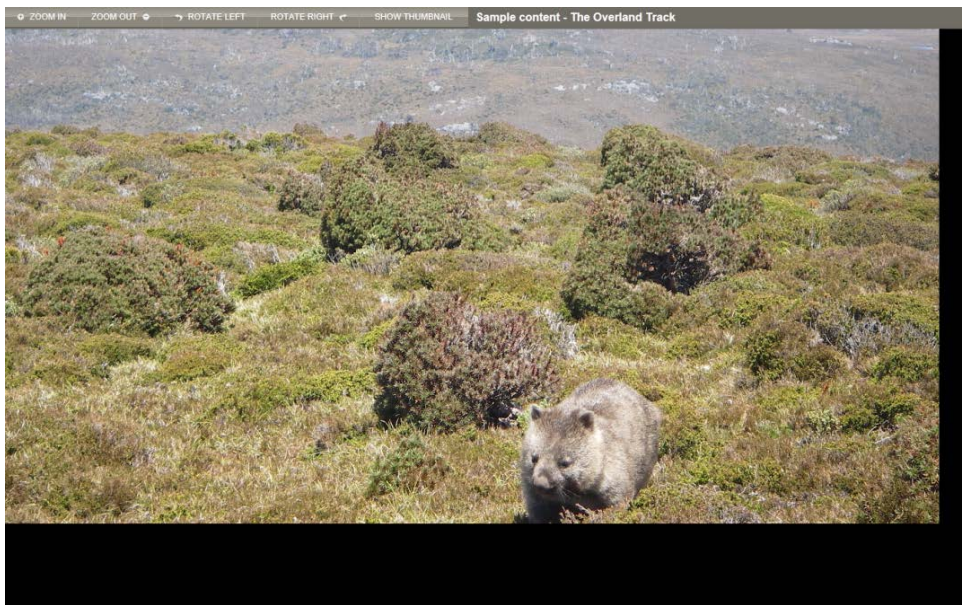


Figure 18 Attachment displayed in large image viewer

Further information is provided in the [Large image viewer](#) section on page 18.

To display multiple attachments

1. Select the **Full screen** link on the resource summary page to display all attachments in the default viewer. An example is shown in Figure 19.

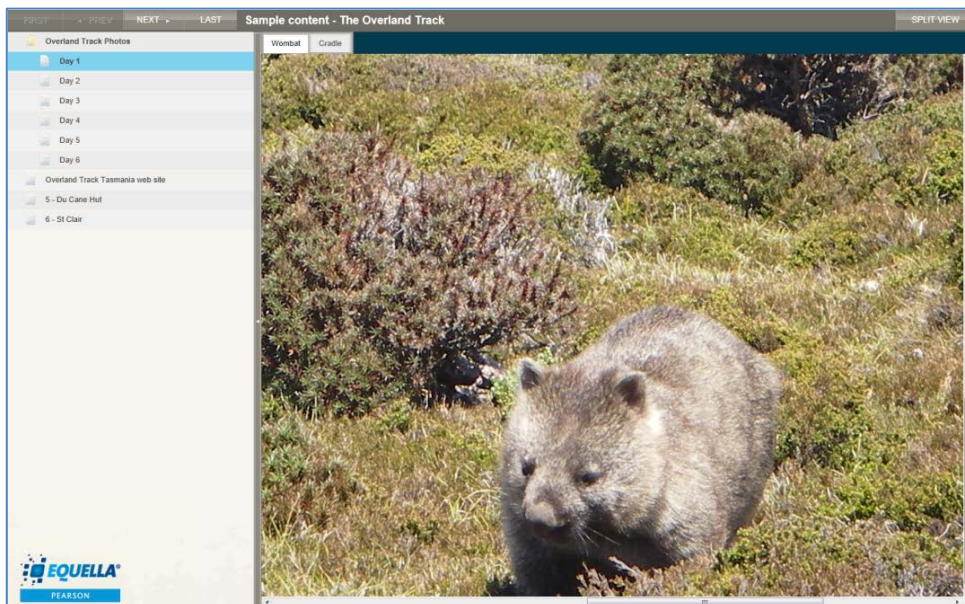


Figure 19 File viewer with packaged content

Large image viewer

An example of the large image viewer is shown in Figure 20.

Large image functionality includes:

- Zoom in, Zoom out, Rotate left and Rotate right.
- **Show thumbnail**—brings up a thumbnail to the top left corner of the image, displaying a smaller version of the image to illustrate the currently viewable portion of the image.
- **Resource name**—the resource name is a clickable link that will return the user to the item summary page.

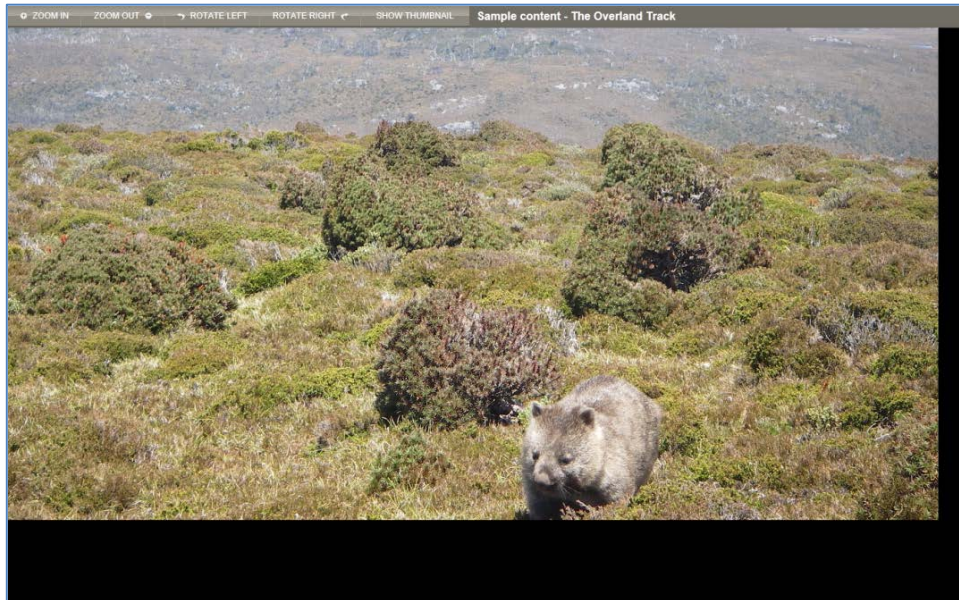


Figure 20 Large image viewer

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 **ADD COMMENT** adds the comments and rating to the **<x> comments** list.

To add a comment

1. Enter text in the **Add a comment** text box (e.g. 'A useful resource').
2. Select an optional star rating (1–5). An example is shown in Figure 21.

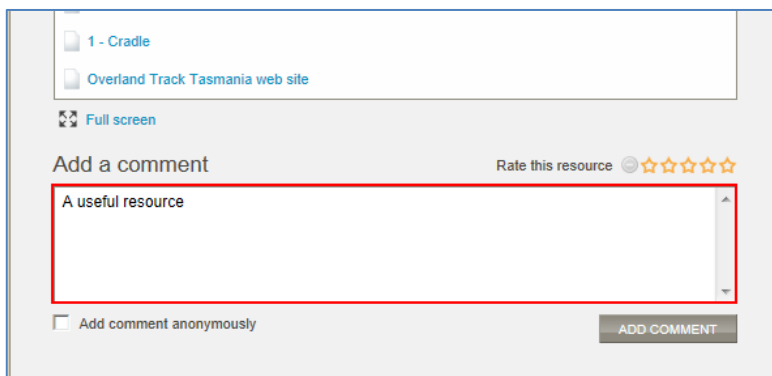


Figure 21 Add a comment section

3. Click .

To delete a comment

1. Select the **Delete comment** link that appears in the comment box alongside the comment, as shown in Figure 22.

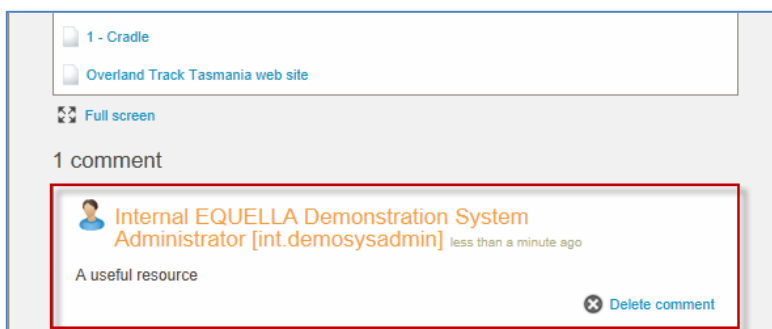



Figure 22 Delete comment

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

Favourites

Individual resources that are frequently used can be added to a resource **Favourites** list, which enables the user quick access. The favourites list is then accessed from the **Favourites** link on the navigation menu.

To add a resource to favourites

1. From the resource summary page, click . The **Add to favourites** dialog displays. An example is shown in Figure 23.

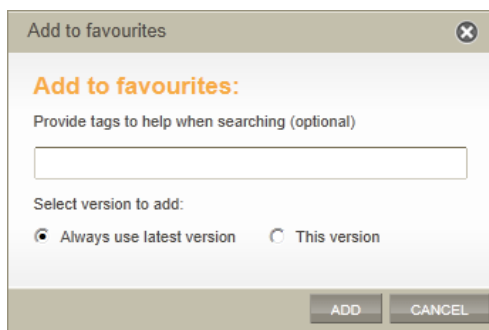





Figure 23 Add to favourites dialog

2. Enter any relevant 'tags' or key words in the edit box (e.g. *wombat*). These tags can then be used in a keyword search to discover the resource.
3. Select the required version in the **Select version to add:** field. The options are:
 - **Always use latest version**—resource listed in favourites will always be the latest version
 - **This version**—the resource listed in favourites will always be the version that was added to the favourites list, regardless of any later versions being created.
4. Click **ADD** to add the resource to favourites.

Once the resource has been added to favourites, the button changes to  Remove favourite. Click to remove the resource from the favourites list.

Share with others

The  Share with others button displays on the resource summary page, under the  Add to favourites button. An example is shown in Figure 24.

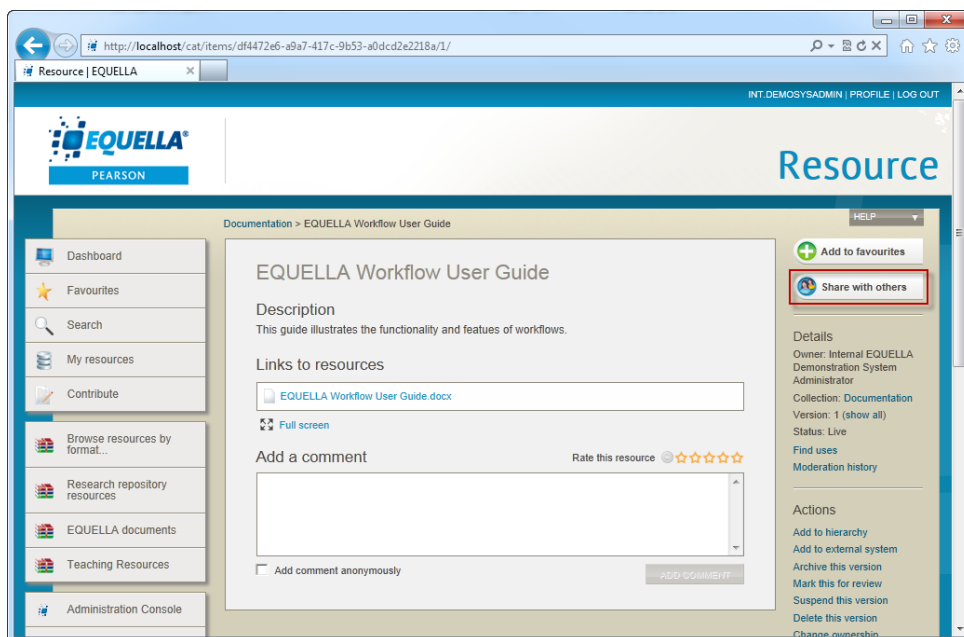



Figure 24 Resource with status of 'moderating'

There are two **Share with others** functions:

- For '*moderating*' resources, the **Share with others** function enables the user to set up a notification to be sent to selected EQUELLA users when the resource status becomes '*Live*', so they are alerted to the fact that the resource is available for use.
- For all resources, regardless of status, the **Share with others** function enables the user to share the resource with an outside source by sending a link via email, which is accessible for a set period of time.

To notify users when resource becomes available (live)

1. From the resource summary page (for resources that are '*moderating*'), click . The **Share with others** page displays. An example is shown in Figure 25.

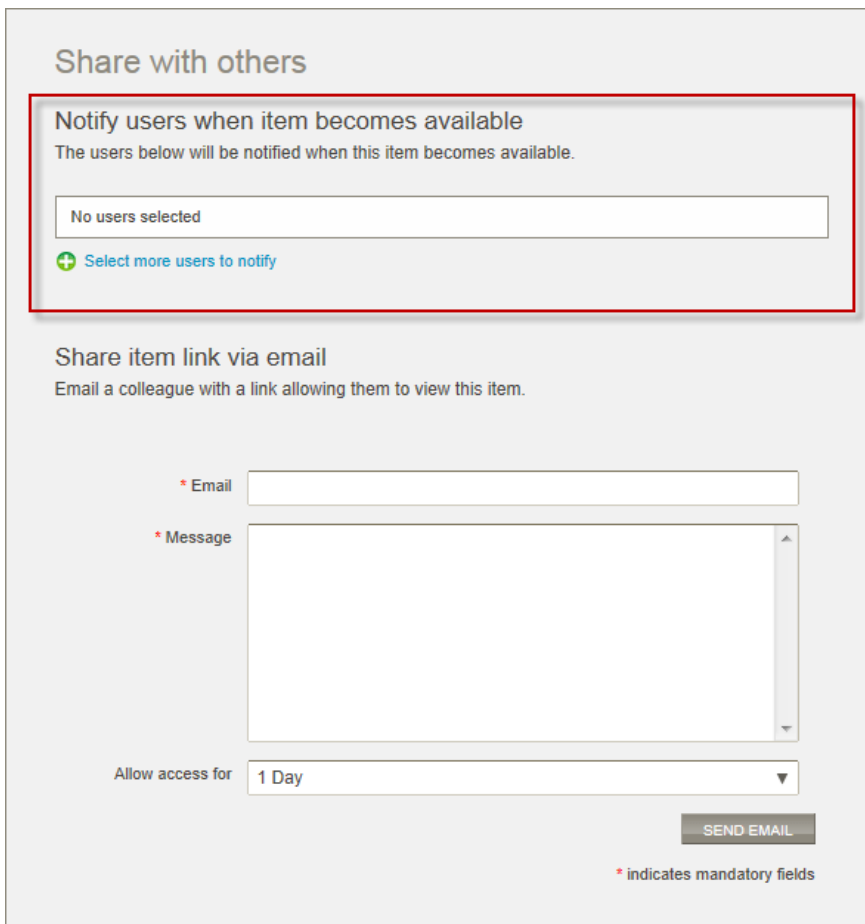


Figure 25 Share with others page

(NOTE: The section within the red box does not display for resources that are '*live*'.)

2. Select the **Select more users to notify** link. The Select user(s) dialog displays.
3. Enter search criteria (e.g. *i**) then click . Matching results are displayed. An example is shown in Figure 26.



Figure 26 Select users dialog

4. Select the required users then click **SELECT THESE USERS**. The **Share with others** page displays with the selected users listed. An example is shown in Figure 27.

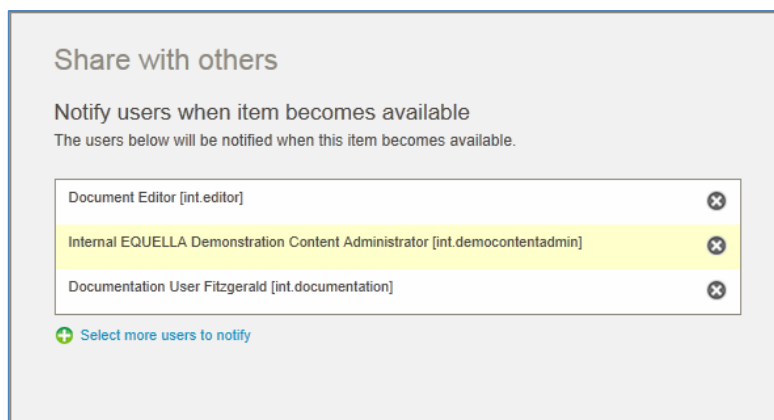


Figure 27 Share with others page with selected users

Select the **Select more users to notify** link to add more users.

Click **X** to remove a user.

Once the resource becomes available (*Live*), the users listed receive notification of the resource's availability. See the *EQUELLA Workflow User Guide* for more information on notifications.

To share a resource with others

1. From the resource summary page, click **Share with others**. The **Share with others** page displays. An example is shown in Figure 28.

Share with others

Share item link via email
Email a colleague with a link allowing them to view this item.

* Email

* Message

Hi Joe,
Thought you might find this resource valuable for your research project.
Cheers,
Jim

Allow access for

* indicates mandatory fields

Figure 28 Share with others via email page

(NOTE: The extra Notify users when item becomes available section, as shown in Figure 25, displays at the top of this page if the resource's status is 'moderating'.)

2. Enter the email address (or multiple addresses separated with a semicolon (;)) in the **Email** field.
3. Enter a relevant **Message**.
4. Select the period of time the email recipients will have access to the resource from the **Allow access for** drop-down list (various options from *1 day* through to *3 months*).
5. Click . An email is sent to the recipients containing the message and the resource link. After the time period has past, the link will no longer work.

Details

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

- **Owner**—the user who created the resource.
- **Collaborators**—any users who have been added as collaborators for the resource.
- **Collection**—selecting this link displays a search result list for that collection.
- **Version**—displays the version number of the current resource. Selecting 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 25.
- **Status**—resource statuses can be *Live*, *Archived*, *Deleted*, *Suspended*, *Review*, *Moderating*, *Rejected* or *Draft*. See [Resource status](#) on page 6 for more information.
- **Find uses**—use this link to display a list of the current uses of this resource in a connected LMS (Moodle or Blackboard Learn). See [Find uses function](#) on page 25.

- **Moderation History**—select this link to display the **Moderation history** page. Refer to the [Moderation history page](#) section on page 28 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 25.
- **Moderation progress**—select this link to display the **Moderation progress** page. Refer to the [Moderation progress page](#) section on page 28 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 29.

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 29.

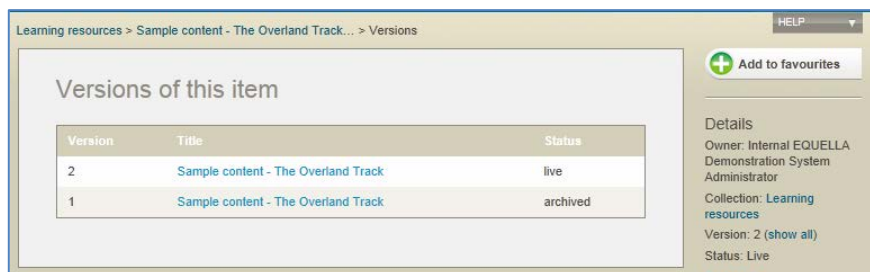


Figure 29 Versions of this item page

When a new resource has been created using the **Create a new version** action, the previous version is archived. The example in Figure 29 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 30.

The screenshot shows the 'Find uses' interface. At the top, there's a 'Searching' dropdown menu set to 'Moodle'. Below it, a section titled 'Where this resource is used' contains a search bar with the placeholder 'Enter text to filter table rows'. The main part of the page is a table with three columns: 'Course', 'Location', and 'Date added'. The table lists 12 courses, each with a location and a date added '3 days ago'. At the bottom, there are two checkboxes: 'Show all versions of this resource' and 'Show hidden courses and items'.

Course	Location	Date added
Australian Geography 101	27 October - 2 November	3 days ago
Australian History 101	3 March - 9 March	3 days ago
Chemistry 101	9 December - 15 December	3 days ago
Australian History 201	General	3 days ago
Australian Geography 101	22 December - 28 December	3 days ago
Australian History - Introduction	25 February - 2 March	3 days ago
Physics 101	20 October - 26 October	3 days ago
Physics 101	13 October - 19 October	3 days ago
Physics 101	6 October - 12 October	3 days ago
Australian History - Introduction	21 January - 27 January	3 days ago
Australian History 101	14 January - 20 January	3 days ago
Physics 201	20 January - 26 January	3 days ago

☐ Show all versions of this resource
☐ Show hidden courses and items

Figure 30 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.

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

Check **Show hidden courses and items** to display any hidden courses and items in which the selected resource is used.

Click 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 31.

Find uses

Searching
Moodle

Where this resource is used

Enter text to filter table rows

Course	Location	Date added
Australian Geography 101	27 October - 2 November	3 days ago
Australian History 101	3 March - 9	
Chemistry 101	9 December	
Australian History 201	General	
Australian Geography 101	22 December	
Australian History - Introduction	25 February	
Physics 101	20 October - 26 October	3 days ago
Physics 101	13 October - 19 October	3 days ago
Physics 101	6 October - 12 October	3 days ago
Australian History - Introduction	21 January - 27 January	3 days ago
Australian History 101	14 January - 20 January	3 days ago
Physics 201	20 January - 26 January	3 days ago

☐ Show all versions of this resource
☐ Show hidden courses and items

Resource version 1

Date modified: 3 days ago

Name in external system: Tasmania - The Overland Adventure

Enrollments: 0

Instructor:

Visible: true

Number of views: 0

Figure 31 Find uses resource details

Terms of use page

Selecting the **Terms of use** link displays the **Terms of use** page which lists the conditions that users must accept before they can view the resource. (*NOTE: The Terms of use page only displays only when there is Digital Rights Management attached to the resource.*) Additionally, a list of users that have accepted those terms of use is displayed. An example is shown in Figure 32.

Learning resources > Sample content - The Overland Track... > Terms of use

Terms of use

Licence agreement

The following rights agreement specifies the rights granted to you the end users of this item. The terms and conditions are as follows:

1. This item may freely be displayed
2. Users must agree to the following terms and conditions
These images may be used in EQUELLA demonstrations, trials and pilot implementations. For other uses, please contact the copyright owner Michael Fraser (mjf@equella.com).

1 user has accepted this licence

User	Date
Internal EQUELLA Demonstration System Administrator	21 minutes ago

Details

Owner: Internal EQUELLA Demonstration System Administrator

Collection: [Learning resources](#)

Version: 2 ([show all](#))

Status: Live

[Find uses](#)

[Moderation history](#)

[Terms of use](#)

Actions

[Add to hierarchy](#)

[Add to external system](#)

[Archive this version](#)

[Mark this for review](#)

[Suspend this version](#)

Figure 32 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 33. 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.
- **Moderation progress**—a graphical flow chart illustrating the layout of the moderation process. The current tasks, and any accepted tasks, are highlighted.

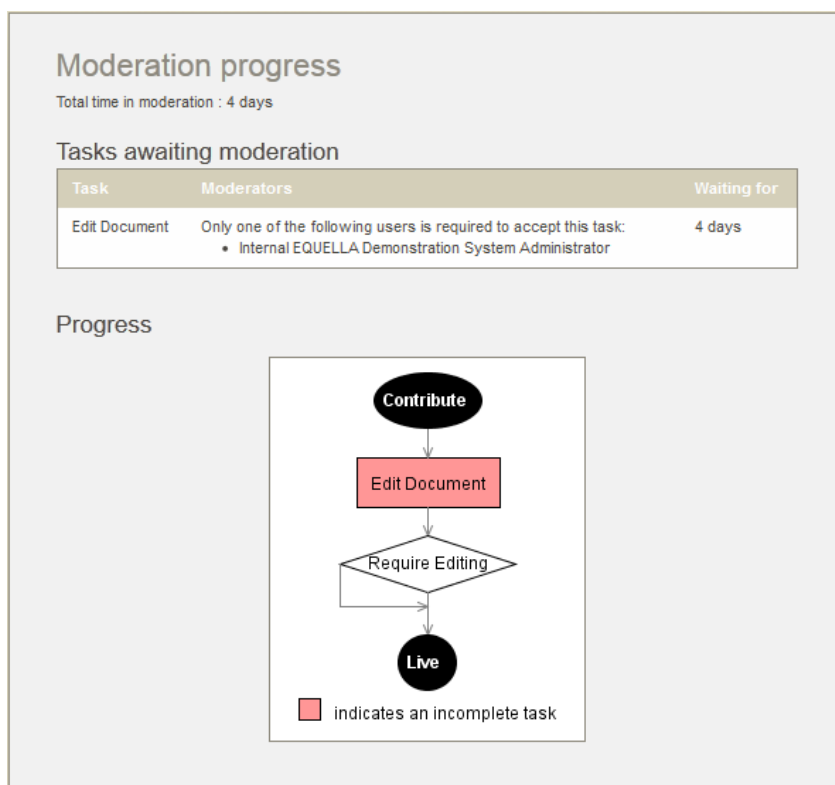


Figure 33 Moderation progress page

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 34.

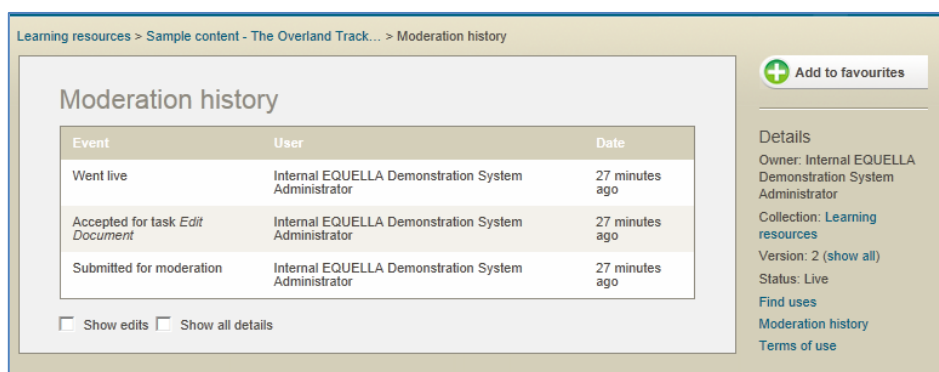


Figure 34 Moderation history page

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**—shows how much time has passed since this event was performed;
- **Show edits checkbox**—switches on and off the display of Edit events in the history; and
- **Show all details**—switches on and off all events in the history, including Edit and Workflow reset events.

Activations page

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 35.

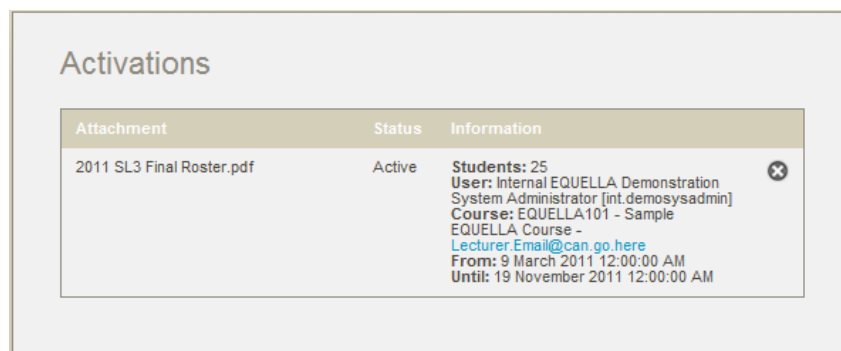


Figure 35 Activations page

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.

Actions

The Actions area can display the following operations:

Modify key resource


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

To add or remove a key resource to a hierarchy topic

1. Select **Modify key resource** to display the **Modify key resource page**. An example is shown in Figure 36.



Figure 36 Add to hierarchy 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 36.

*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.*

4. Click . A confirmation screen displays, as shown in Figure 37.

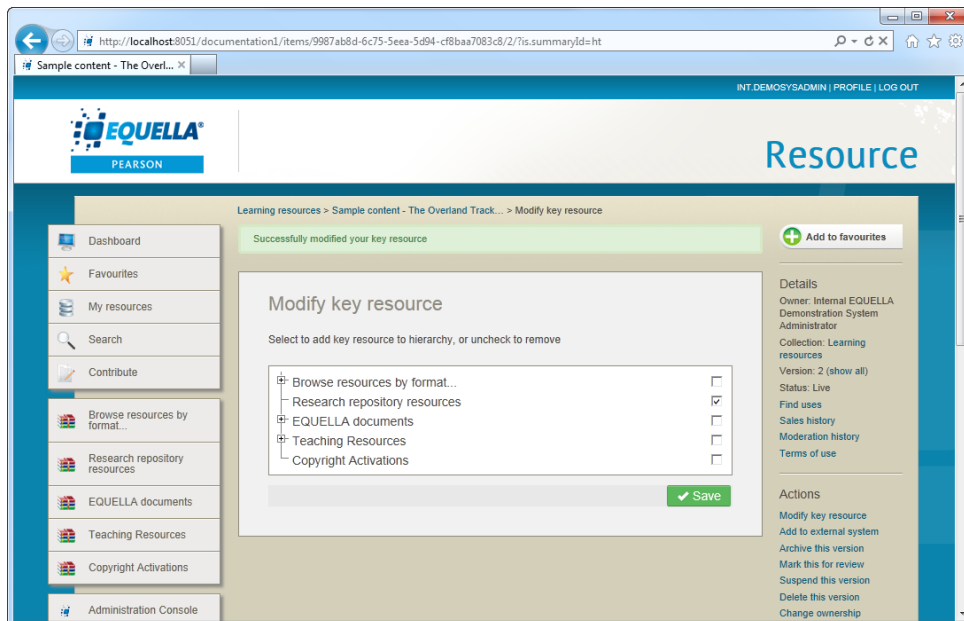


Figure 37 Confirmation of Key resource modification

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 on hierarchies and key resources.

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 systems (LMSs) that have been configured in the system. (*NOTE: The **Add to external system** link only displays if at least one external (LMS) connector has been configured in the EQUELLA system.*) See the *EQUELLA Push to LMS Guide* for more information.

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

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

To add a resource to an external system

1. Select **Add to external system** from Actions.
2. Select the external LMS 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 with a Moodle connector is shown in Figure 38.

Learning resources > Tasmania - The Overland Adventure > Add to external system

Add to external system

Adding resources to
Moodle

Select the resources to add

☐ Add resource summary

- ☐ 1 - Wombat
- ☐ 1 - Cradle
- ☒ Overland Track Tasmania web site

Select the locations to add to

Enter text to filter courses

- 15 December - 21 December
- 22 December - 28 December
- 29 December - 4 January
- Australian History - Introduction
 - General
 - 14 January - 20 January
 - 21 January - 27 January
 - 28 January - 3 February
 - 4 February - 10 February
 - 11 February - 17 February
 - 18 February - 24 February
 - 25 February - 2 March

☐ Show hidden courses

ADD SELECTED RESOURCES

Details

Owner: Cath Fitzgerald
Collection: Learning resources
Version: 1 (show all)
Status: Live
[Find uses](#)
[Moderation history](#)

Actions

- [Add to hierarchy](#)
- [Add to external system](#)
- [Archive this version](#)
- [Mark this for review](#)
- [Suspend this version](#)
- [Delete this version](#)
- [Change ownership](#)
- [Export](#)
- [Move item into another collection](#)
- [Clone item into a collection](#)
- [New contribution of same type](#)
- [Redraft this version](#)
- [Create a new version](#)
- [Edit this version](#)

Figure 38 Add to external system

3. Select the required resources from the **Select the resources to add** section. Check the **Add resource** summary checkbox to add the resource including metadata and all attachments, or select single attachments.
4. Select the locations to which the resource should be added. Check the **Show hidden courses** checkbox (Moodle) or **Show unavailable courses** checkbox (Blackboard) to add to hidden/unavailable course locations. Select **ADD SELECTED RESOURCES**

(NOTE: Enter course search criteria in the filter box to return only matching results.)

5. An action receipt confirming the successful addition of the resource is displayed at the top of the page. An example is shown in Figure 39.
6. Use the breadcrumbs to navigate back to the resource, as shown in Figure 39.

Learning resources > Tasmania - The Overland Adventure > Add to external system

Published
Overland Track Tasmania web site to 20 January - 26 January in Australian History 201
Overland Track Tasmania web site to 22 December - 28 December in Australian Geography 101
Overland Track Tasmania web site to 14 January - 20 January in Australian History - Introduction

[Add to favourites](#)

Details
Owner: Cath Fitzgerald
Collection: [Learning resources](#)
Version: 1 (show all)
Status: Live
[Find uses](#)
[Moderation history](#)

Actions
[Add to hierarchy](#)
[Add to external system](#)
[Archive this version](#)
[Mark this for review](#)
[Suspend this version](#)
[Delete this version](#)
[Change ownership](#)
[Export](#)
[Move item into another collection](#)
[Clone item into a collection](#)
[New contribution of same type](#)
[Redraft this version](#)
[Create a new version](#)
[Edit this version](#)

Add to external system

Adding resources to
Moodle

Select the resources to add

☐ Add resource summary

☐ 1 - Wombat
☐ 1 - Cradle
☐ Overland Track Tasmania web site

Select the locations to add to

Enter text to filter courses

- Australian Geography 101
- Australian History - Introduction
- Australian History 101
- Australian History 201
- Chemistry 101
- COURSE A
- COURSE B
- COURSE C
- COURSE D
- EQUELLA 41
- EQUELLA Documentation Course
- GAMERS
- Moodle 2.0 Testing

Figure 39 Successful addition of resource to Moodle location

Archive this version

This 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.

Suspend this version

This 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.

Delete this version

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

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 40.



Figure 40 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. Select the **Add collaborators** link to display the **Select collaborators** dialog. Collaborators are listed with a **Remove** link alongside them.

Export

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

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 41.

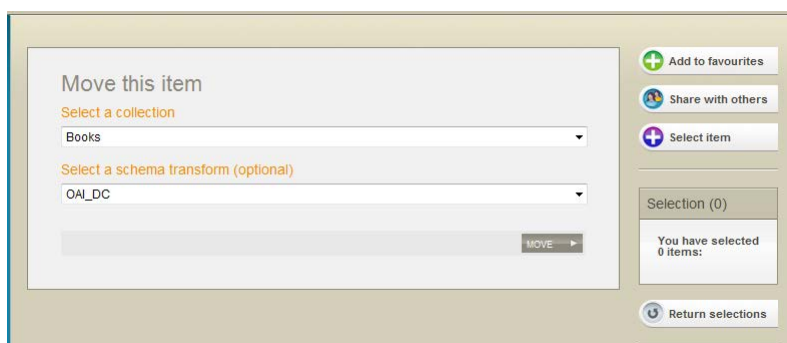


Figure 41 Move this item page

2. Click on 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.

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 42.

Learning resources > Sample content - The Overland Track... > Clone item into a collection

Clone this item

Select an operation

☒ Clone ☐ Clone without attachments

Select a collection

Learning resources ▼

Select a schema transform (optional)

(None selected) ▼

CLONE

[Add to favourites](#)

Details

Owner: Internal EQUELLA Demonstration System Administrator

Collection: [Learning resources](#)

Version: 2 ([show all](#))

Status: Live

[Find uses](#)

[Moderation history](#)

[Terms of use](#)

Actions

[Add to hierarchy](#)

Figure 42 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.
 - **Clone without attachments**—copy metadata without attachments.

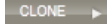
The cloned resource can be assigned to the same collection as the original resource, or to a different collection. The original collection is displayed as the default in the **Select a collection** section.

To assign the cloned resource to a different collection

1. Click on 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.

New contribution of same type

Selecting this action displays a 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*.

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.

Edit this version

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

Scrapbook

The Scrapbook page enables users to author and edit web pages, and upload and edit single or multiple files. This unpublished content belongs to the logged in user and cannot be viewed, edited or deleted by other users. It can be added to resources during contribution.

Select the **Scrapbook** link to open the Scrapbook results page. An example is shown in Figure 43.

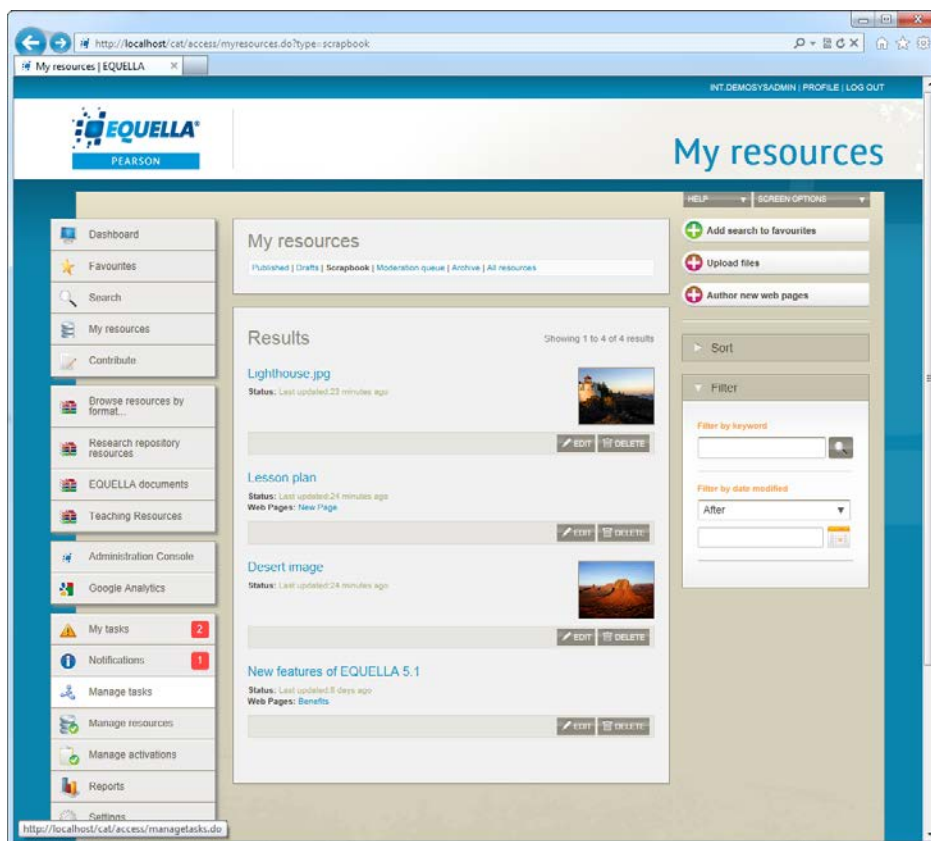



Figure 43 Scrapbook results page

The following elements can display:

Name—the name of the file or description of the web page.

Status—time since last updated.

Web page links—the names of the associated web pages (only appears for web pages).

 **EDIT**—opens the **Author new web pages** page for web pages or the **Upload files** page for files.


 **DELETE**—click to delete the web page or file link from the scrapbook.

View files and web pages


Clicking on a file link opens the file with relevant display page, depending on the file type. Image files and web pages automatically display in the default viewer. For other file types, a dialog opens and has the following options:

- **Open**—opens the file with the default program for that file type (e.g. docx files open with MS Word, pdf open with Adobe Reader etc.).
- **Save**—downloads a copy of the file to the user's local drive.
- **Save as**—allows the user to save the file to user specified location.

Add to favourites

Clicking  on the right-hand side of the page displays the **Add search to favourites** dialog where a name is entered to help identify the search. See [Add search to favourites](#) on page 10 for more information.

Upload files

Clicking  on the right-hand side of the page displays the **Upload files** page, as shown in Figure 44.

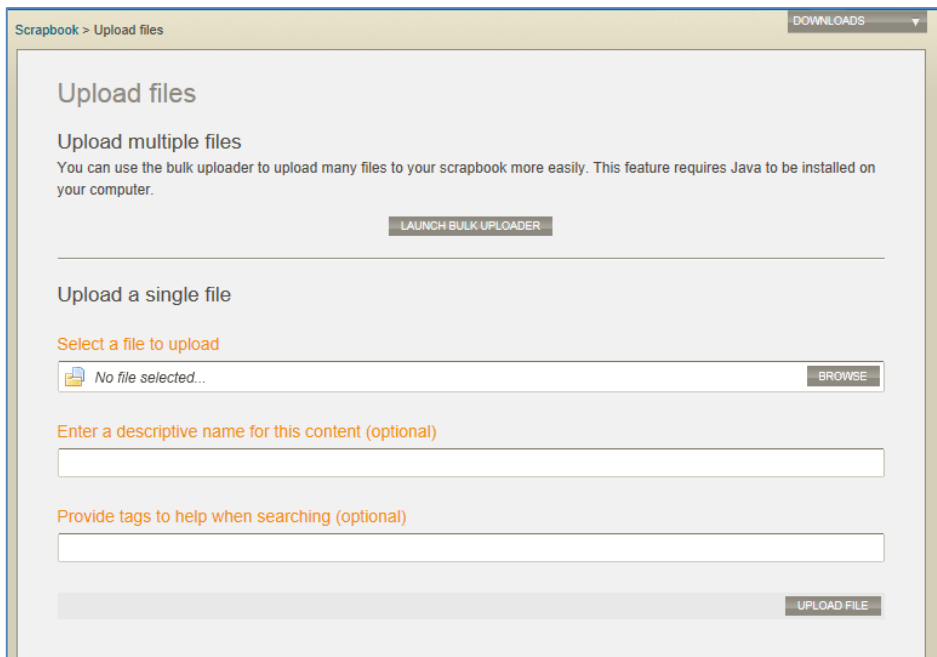


Figure 44 Upload files page

From this page, the user can upload single or multiple files and enter a descriptive name and or tags for a single file.

To upload multiple files

1. Click  to display the bulk uploader screen, as shown in Figure 45.

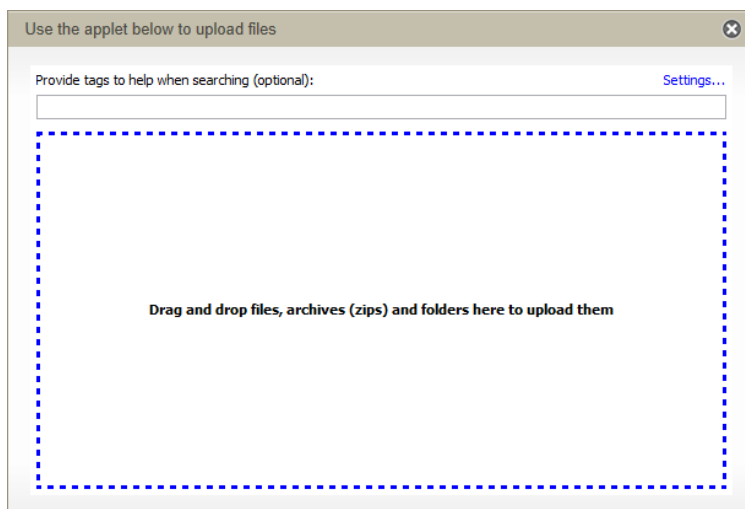


Figure 45 Bulk uploader

2. Enter any relevant tags in the **Provide tags to help when searching (optional):** edit box. (*NOTE: Any tags entered here are stored against each file that is uploaded in this instance.*)
3. Drag and drop required files from a local hard drive or network to the bulk uploader page. Files can be added in the following ways:
 - **Single or multiple files**—drag and drop single or multiple files onto the page. Files can be dragged one at a time or in groups. If done in groups, each file is added as a separate item on the scrapbook results list.
 - **Archives (eg zips)**—archive files can be dragged onto the page. Select the **Settings...** link on the top right-hand side of the page to open the **Settings** dialog and configure archive file behaviour when uploaded. An example is shown in Figure 46.

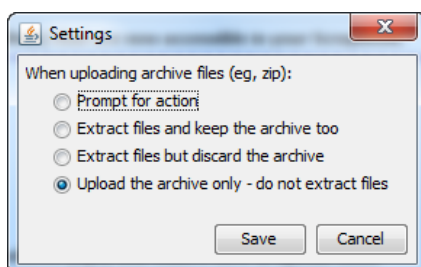


Figure 46 Archive file settings dialog

The options are:

- **Prompt for action**—asks the user what action to take on adding an archive file. An example is shown in Figure 47.

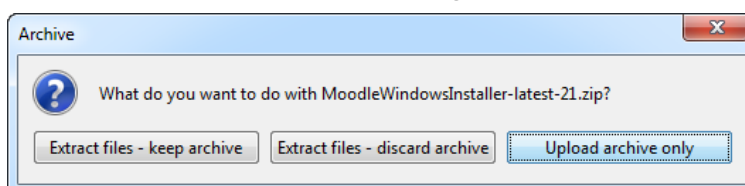


Figure 47 Prompt for action dialog


- Extract files—keep archive
- Extract files—discard archive
- **Upload the archive only**—this will not extract files.

(NOTE: If an option has not been selected in Settings and an archive file is added, **Prompt for action** is the default.)

If multiple files are extracted, each file is added as a separate item on the scrapbook results list.

- **Folders**—folders can be dragged onto the page. Each file within the folder is added as a separate item on the scrapbook results list.

Author new web pages

Clicking  on the right-hand side of the page opens the **Author new web pages** page, as shown in Figure 48

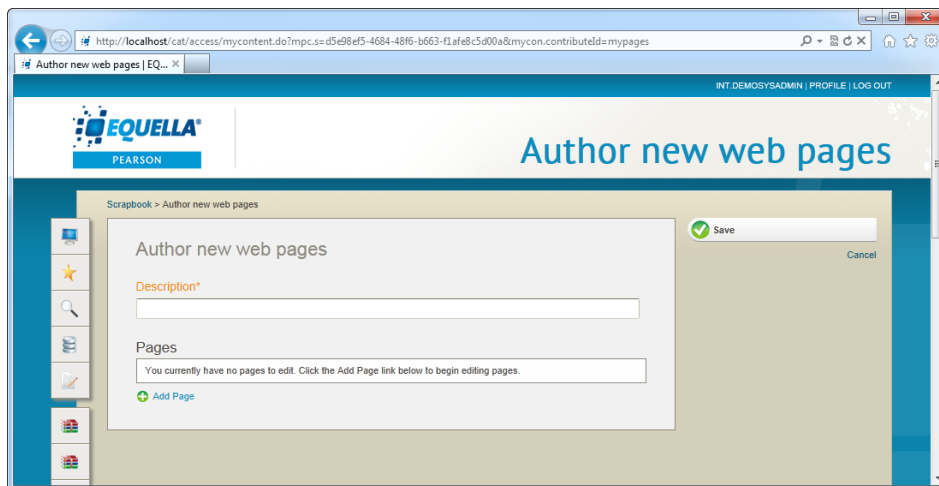


Figure 48 Author new web pages page

From this page, the user can enter a description and create one or more web pages. The description should be a brief summary of what the web page is about.

To add a web page

1. Select the **Add Page** link to open the **Edit page** section. An example is shown in Figure 49.

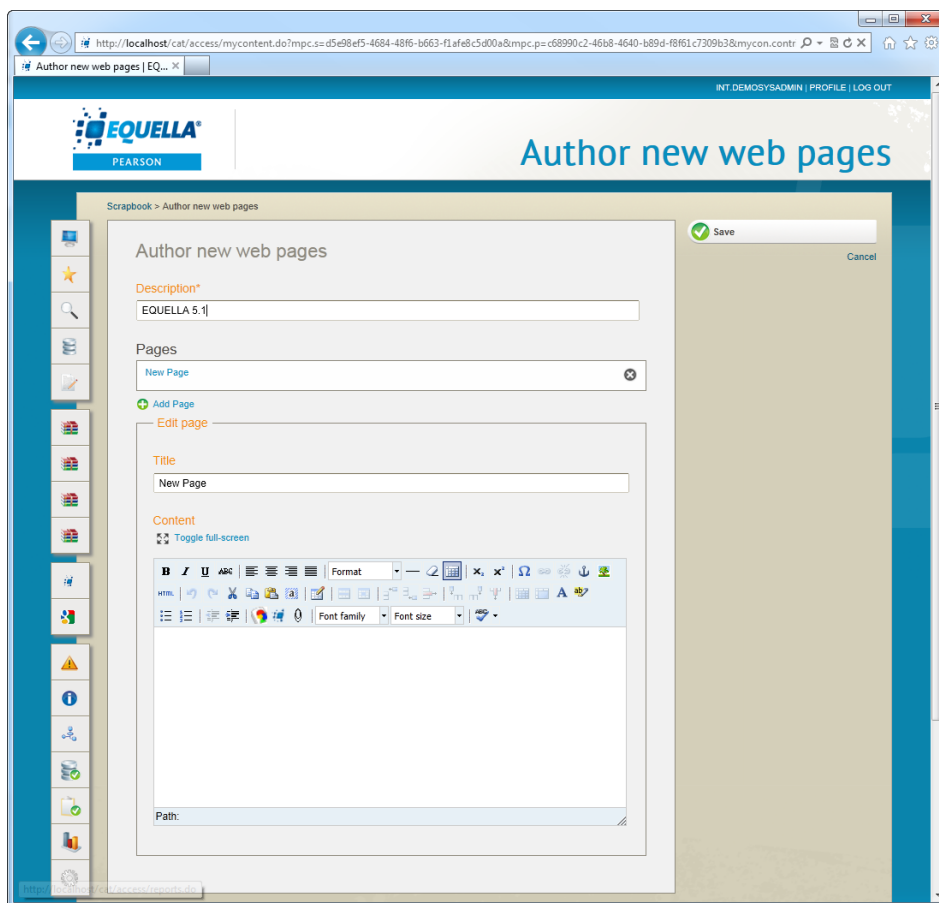



Figure 49 Author new web pages page with Edit page section

The **Edit page** section has two fields: **Title** and **Content** (EQUELLA HTML Editor).

2. Enter a name for the web page in the **Title** edit box (e.g. *Benefits*).
3. Enter the required content using the EQUELLA HTML editor, which supports multiple operations. Select the **Toggle full-screen** link to use the EQUELLA HTML editor in full screen mode. See [EQUELLA HTML Editor](#) on page 44 for more information.
4. Select the **Add Page** link to add more pages. Once all required pages have been added and formatted, click  **Save**. The new item displays in the results list, with the web page titles listed. An example is shown in Figure 50.

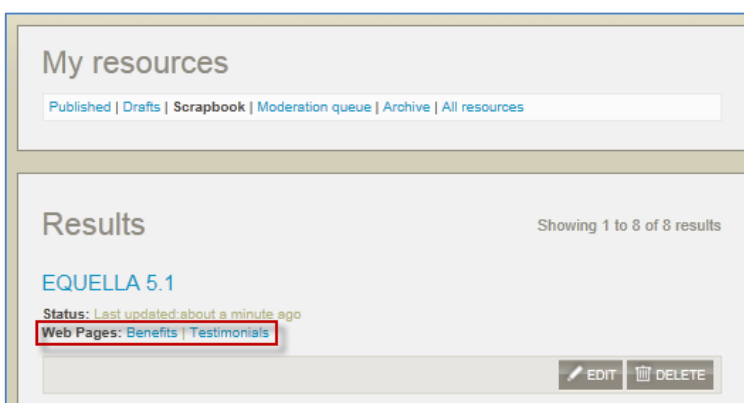


Figure 50 New web pages item

Edit files

Click  to open the edit page. The **Upload files** page opens for files.

The Upload files page enables the user to change the name of the file, replace the file with a different one or add tags to help when searching. It also allows the user to edit the file. An example is shown in Figure 51.

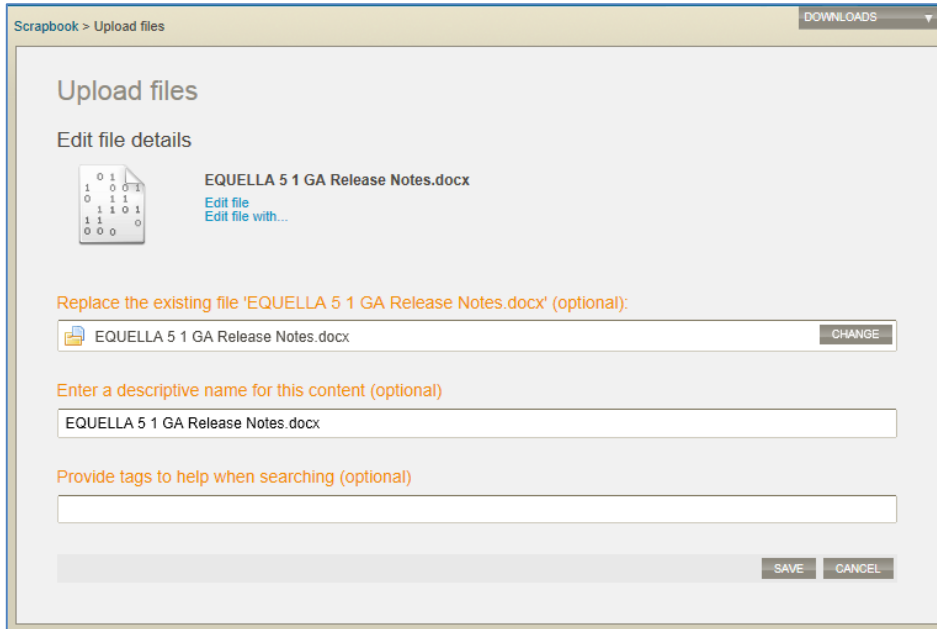


Figure 51 Upload files page

To edit a file


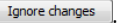
1. In the **Edit file details** section, click the **Edit file** link to open the file with the default program (e.g. *MS Word*) or click the **Edit file with...** link to select another available editing program (e.g. *Notepad*).
2. Make the required changes and save the file in the editing program. Two new buttons display on the Upload files page:  and . An example is shown in Figure 52.

Figure 52 Upload files page with changes buttons

3. Click to save the changes to the file or to discard the changes.

To replace the file

1. In the **Replace the existing file 'x' (optional):** (e.g. *Replace the existing file 'EQUELLA 5.1 GA Release Notes.docx' (optional)*) click . The **Choose file to upload** screen displays. Browse to the required file then double-click or click to select. The new file replaces the original.

To rename the content

1. In the **Enter a descriptive name for this content (optional)** edit box, type the required name (e.g. *EQUELLA 5.1 Release Notes*). This doesn't change the name of the file, just the display name in the search results list.

Tags can also be entered in the **Provide tags to help when searching (optional)** edit box, to make future searching easier.

Once all required changes are made, click .

Edit web pages

Click to open the **Author new web pages** page. The web pages are listed at the top of the screen. An example is shown in Figure 53.

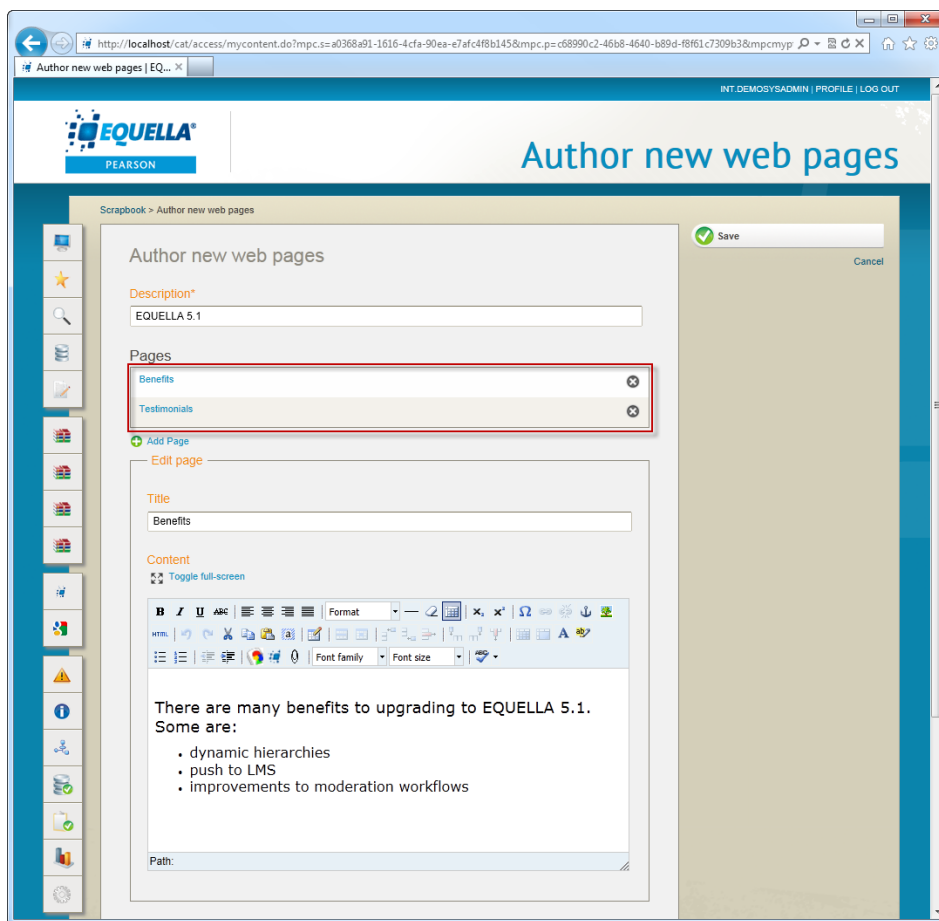


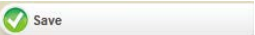


Figure 53 Web pages edit screen with pages listed

To edit a web page

1. Select the required page title link (e.g. *Testimonials*) to swap between web pages and use the EQUELLA HTML editor to edit the pages. (NOTE: Further pages can be added by clicking the **Add Page** link.)
2. Click  to save the changes.

To delete a web page

1. Click  beside the required web page title.
2. Click  to save the changes.

EQUELLA HTML Editor

The EQUELLA HTML Editor enables the user to create and edit web pages that will be stored in their **Scrapbook** or attached to a resource during contribution. An example of the standard EQUELLA HTML Editor is shown in Figure 54.



The HTML Editor comprises the following components:

-

Figure 55 The HTML Editor toolbar

-
- EQUELLA®**
Revolutionizing the way
institutions search, manage
and create content online.
- Digital
Repository
- Using the HTML Editor**
- The HTML Edit Box control provides an inline editor in the Contribution Wizard that allows users to create web page content spontaneously when needed. The HTML Editor will appear in a Contribution Wizard when the appropriate control has been included. It's also available in My Resources Scrapbook.
- Path: p » strong

Figure 56 HTML Editor text pane

- **Status bar**—the area below the text pane that displays information regarding the formatting of objects in the editor. An example showing the paragraph style of the highlighted text is shown in Figure 57.

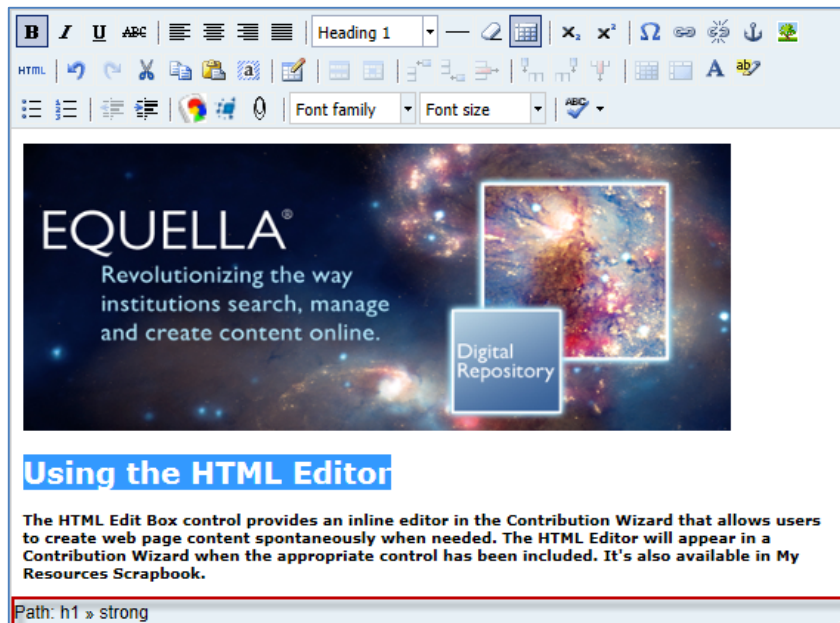


Figure 57 The HTML Editor status pane

The HTML Editor can be resized when it is not in full screen mode by clicking on the bottom right-hand corner of the editor pane and dragging it to the required size.

Toolbar buttons in the HTML Editor

The toolbar comprises a range of buttons that provide useful functions for editing HTML. Tool tips provide a name for each button and can be seen when the mouse is hovered over the button. The standard buttons provide the following functions:

- Bold
- Underline
- Align Left
- Align Right
- Styles
- Insert Horizontal Ruler
- Toggle guidelines/Invisible elements
- Superscript
- Insert/edit link
- Edit HTML source
- Redo
- Paste
- Inserts a new table
- Italic
- Strikethrough
- Align Centre
- Align Full
- Remove formatting
- Subscript
- Insert custom character
- Insert/edit image
- Undo
- Cut
- Copy
- Select all
- Table row properties

- Table cell properties
- Insert row after
- Insert column before
- Delete column
- Merge table cells
- Select background colour
- Ordered list
- Indent
- Select a resource from EQUELLA
- Font
- Toggle spellchecker
- Insert row before
- Delete row
- Insert column after
- Split merged table cells
- Select text colour
- Unordered list
- Outdent
- Embed a file from scrapbook
- EQUELLA file uploader
- Font size
-

Full descriptions of these functions, and more detailed information on using the HTML Editor is provided in the *EQUELLA HTML Editor User Guide*.

Moderation queue

The **Moderation queue** enables the logged in user to view all their resources currently waiting for moderation within a workflow.

To view the Moderation queue page

1. Click the **Moderation queue** link at the top of the page. The results display all resources belonging to the logged in user that are currently in a moderation workflow. An example is shown in Figure 58.

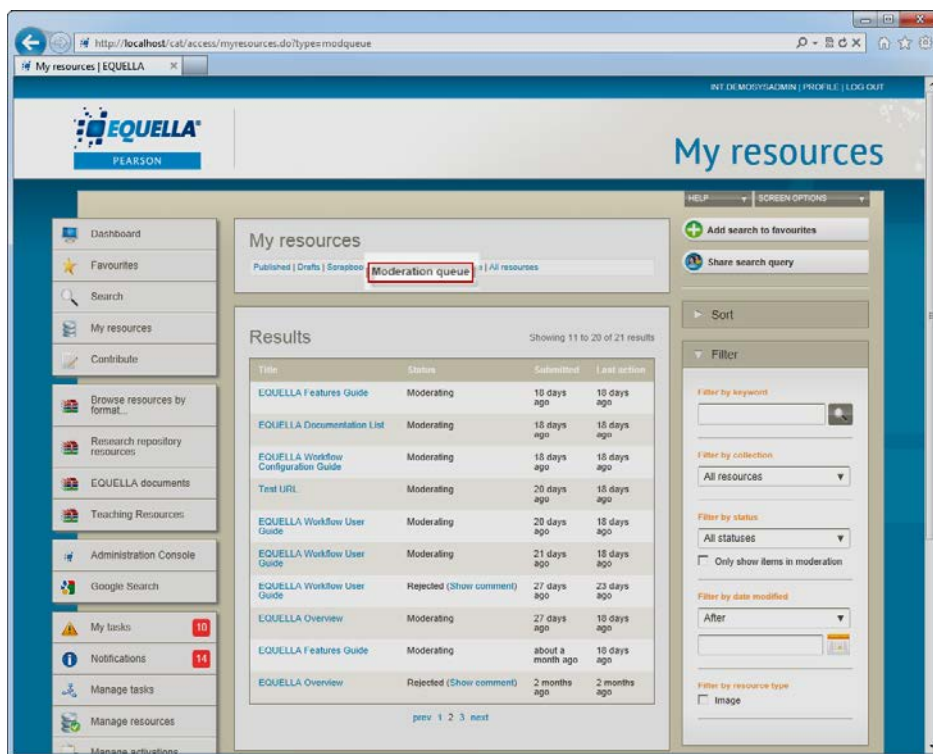


Figure 58 My resources—Moderation queue

The Moderation queue results page elements include:

- **Title**—the resource title. Select the link to go to the resource summary page.
- **Status**—the resource status on this page with always be *Moderating*, *Review* or *Rejected*. If the status is *Rejected*, a **Show comment** link displays. Select this link to view the rejection comment.
- **Scheduled**—the time in days since the resource entered moderation. Hover the mouse over this value to see the exact time and date. An example is shown in Figure 59

Results Showing 11 to 20 of 21 results

Title	Status	Submitted	Last action
EQUELLA Features Guide	Moderating	18 days ago	18 days ago
EQUELLA Documentation List	Moderating	18 days ago	18 days ago
EQUELLA Workflow Configuration Guide	Moderating	18 days ago	18 days ago
Test URL	Moderating	20 days ago	18 days ago
EQUELLA Workflow User Guide	Moderating	20 days ago	18 days ago
EQUELLA Workflow User Guide	Moderating	21 days ago	18 days ago
EQUELLA Workflow User Guide	Rejected (Show comment)	27 days ago	24 days ago
EQUELLA Overview	Moderating	27 days ago	18 days ago
EQUELLA Features Guide	Moderating	about a month ago	18 days ago
EQUELLA Overview	Rejected (Show comment)	2 months ago	2 months ago

prev 1 2 3 next

Figure 59 Date displayed when mouse hovered over Submitted value

- **Last action**—the time in days since the last moderation task was performed on the resource. Hover the mouse over this value to see the exact time and date.
- **Page controls**—click the **prev**, **(x)** or **next** links to move through the pages.

Sort and filter

The **Sort** and **Filter** boxes on the Moderation queue results page display options relevant to resources in a moderation workflow. An example of the **Sort** box is shown in Figure 60.

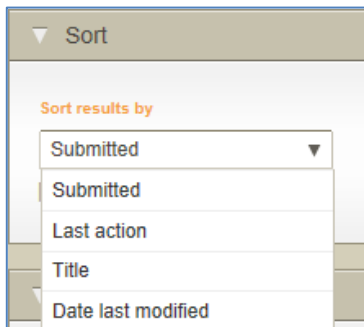


Figure 60 Moderation queue sort box

The sort options are:

- **Submitted**—the date submitted to moderation.
- **Last action**—the date the last moderation task was performed.
- **Title**—name of the resource.
- **Date last modified**—the date the resource was last edited.

An example of the **Filter** box is shown in Figure 61.

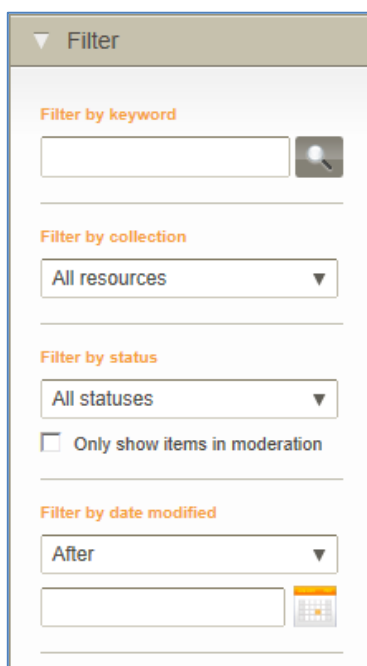


Figure 61 Moderation queue filter box

From the Moderation queue results pages, the following filter options are available:

- **Filter by keyword**—allows the user to enter keywords to search within the Moderation queue page. The system searches for matching keywords in the resource title, description and attachment name.
- **Filter by collection**—select the required collection from the drop-down list to see only resources belonging to that collection.
- **Filter by status**—select the required status (*All resources, Moderating, Rejected or Review*).
- **Only show items in moderation**—select to view only resources with the status of *Moderating*.
- **Filter by date modified**—select a qualifier from the drop-down list (**After, Before, Between** or **On**), then click the calendar field or icon to display a calendar control.

Contact Client Support

We are always happy to help.

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