

EQUELLA®

Searching User Guide

Version 6.2

Document History

Document No.	Reviewed		Finalised		Published	
1	5/12/2013		6/12/2013		6/12/2013	

December 2013 edition.

Information in this document may change without notice. EQUELLA® and its accompanying documentation are furnished under a non-disclosure, evaluation agreement or licence agreement. Copying, storing, transmitting, or otherwise reproducing the software or this document in any form without written permission from Pearson is strictly forbidden.

All products, other than EQUELLA®, named in this document are the property of their respective owners.

Property of:

Pearson
Level 1, 11 Elizabeth Street
Hobart, Australia, 7000

Copyright © 2013 Pearson

Contact documentation@equella.com for matters relating to documentation.

Table of Contents

Searching overview	5
EQUELLA Dashboard	5
Search types.....	6
Search edit box	7
Keywords	7
Autocomplete.....	8
Multiple keywords	10
Use of a wildcard (*).....	12
Relevance scores and searching attachments	13
Quick search	15
Search page	16
Search options	18
Search by Collection	18
Advanced search	19
Search results pages.....	21
Add search to favourites	22
Share search query.....	23
Sorting and filtering	23
Search Remote repositories	27
MERLOT sort and filter options	29
Other remote repository types.....	32
Favourites	33
Resources.....	34
Searches	35
My resources	36
Filter	37
My tasks.....	38
Sort and filter.....	40
Notifications.....	41
Filter	42
Manage external resources	43
Manage tasks.....	45
Sort and filter.....	47
Manage resources.....	48
Manage activations	48
Filter	49
Google Books search.....	50

iTunes U search.....	51
YouTube search.....	52
Flickr search	54
Sort and filter.....	56
Kaltura search.....	57
Browsing	59
Browsing using hierarchy topic links.....	60
Browsing using the Browse portlet	61
Displaying subtopics and results	63
Viewing key resources.....	64
Search settings	65
Searching options	66
Searching terms boost	67
Content indexing options	68
Contact Client Support	71

Searching overview

The EQUELLA Digital Repository allows users to search, create, store, manage, view and share content. Content can include published content (*resources*) and personal content (*files and web pages*). A variety of searching methods are available for finding content in the repository, ranging from a basic keyword search to complex custom searches targeting specific resource information (metadata), to browsing specific categories.

In addition to searching, EQUELLA provides a variety of options for sorting and filtering the search results to drill down to the specific needs of the user.

The purpose of this guide is to give users an overview of the available search options and how they can be most effectively used.

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 Dashboard

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.

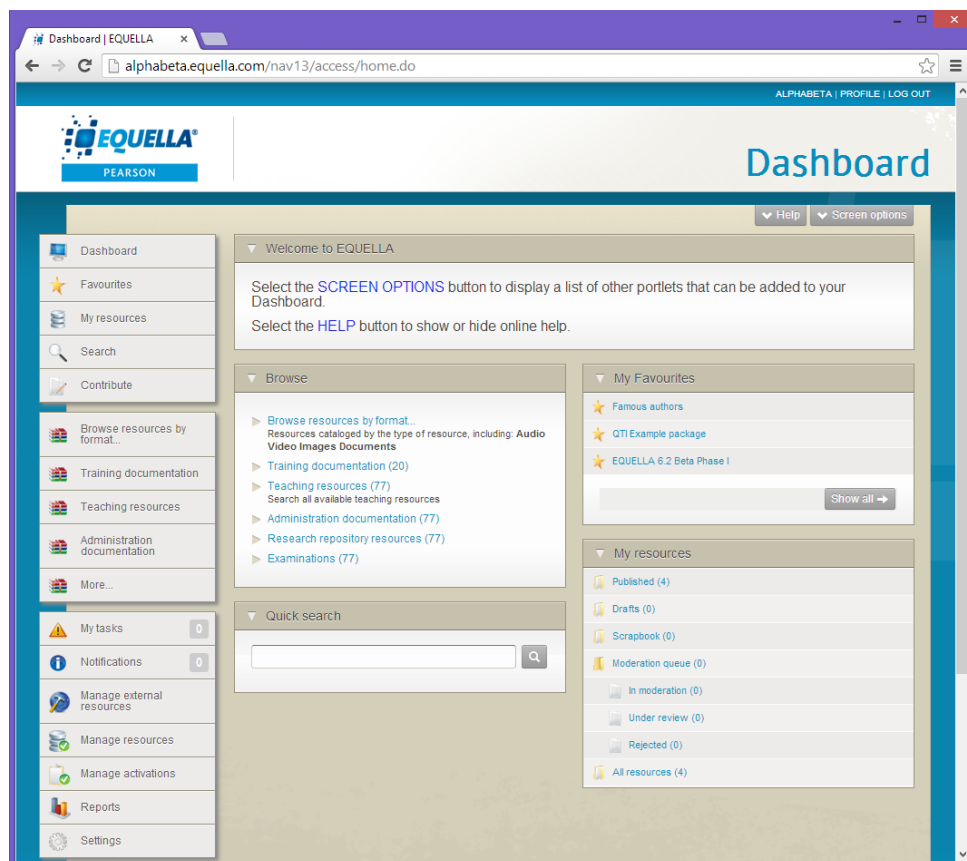


Figure 1 EQUELLA Home page

The EQUELLA Digital Repository allows users to search for and discover content in a number of ways.

Search types

There are a variety of search types available for discovering EQUELLA content, including:

- **Basic search**—search by keyword, used when the resource name or keywords are known. See [Search page](#) on page 16 for more information.
- **Search by collection**—search within a specific collection. See [Search by collection](#) on page 18 for more information.
- **Advanced search**—target specific resource information (metadata) using customised search criteria. See [Advanced search](#) on page 19 for more information.
- **Search other repositories**—search for records from a variety of external sources such as library databases and search engines. See [Search Remote repositories](#) on page 27 for more information.
- **Favourites**—search within a group of resources or searches that have been bookmarked as favourites. See [Favourites](#) on page 33 for more information.
- **Google Books™ search**—search for Google Books content to add to contributed resources. See [Google Books search](#) on page 50 for more information.

- **iTunes U™ search**—add tracks from iTunes U to resources during contribution. See [iTunes U search](#) on page 51 for more information.
- **YouTube™ search**—search for YouTube content to add to contributed resources. See [YouTube search](#) on page 52 for more information.
- **Flickr search**—search for Flickr images to add to contributed resources. See [Flickr search](#) on page 54 for more information.
- **Kaltura**—search for Kaltura streaming media files to add to contributed resources. See [Kaltura search](#) on page 57 for more information.
- **Browse**—browse hierarchy categories to 'drill down' to required resources. See [Browsing](#) on page 59 for more information.

Search edit box

The **search edit box** is found on most search pages in the EQUELLA system, and allows the user to enter keyword data to search for matching resources. An example of the Quick search edit box is shown in Figure 2.

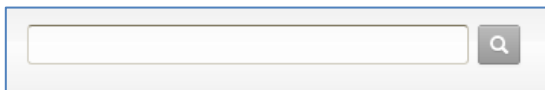


Figure 2 Search edit box

Once keywords are entered, the system can search resource titles, descriptions, attachment names and content and other metadata for matching results, depending on how the search options are configured.

Keywords

In EQUELLA, keywords can be entered to search for matching resources. A single keyword can be entered, or a number of keywords. The keywords must be an exact match within the resource name, description or stored keywords (e.g. *equella*), otherwise no matching results will be found.

For example, entering the keyword '*equella*' will return any resources that have the word '*equella*' in their title, description, attachment name or attachment content (for most attachment types). An example is shown in Figure 3.

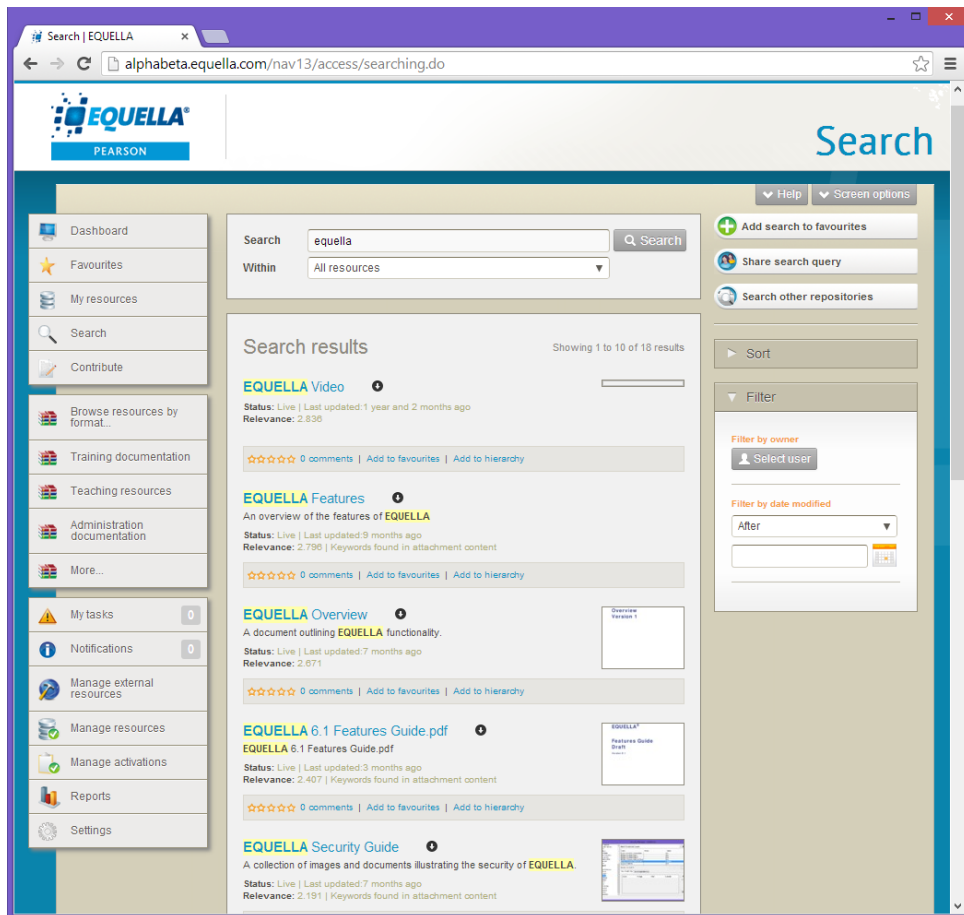


Figure 3 Single keyword search results

(NOTE: Each keyword match is highlighted in yellow.)

Autocomplete

Autocomplete functionality is available in the search edit box and most keyword searches. Autocomplete means that the user can type two or more letters into the search text box and EQUELLA will suggest resource titles based on the letters entered.

For example, if the user is looking for a resource that has *equella* in its title, as soon as they type in *eq*, up to four suggestions display, based on relevance. An example is shown in Figure 4.

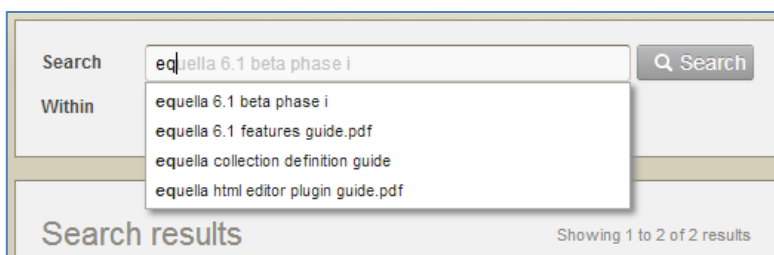


Figure 4 Autocomplete functionality

If the user is searching for *equella* 6.2, typing the 6.2 will change the suggestions. An example is shown in Figure 5

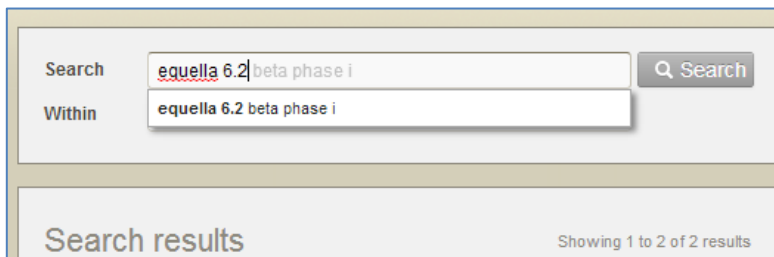
The screenshot shows a search interface with a 'Search' label and a text input field containing 'equella 6.2 beta phase i'. Below the input field is a 'Within' label and a dropdown menu showing 'equella 6.2 beta phase i'. To the right of the input field is a 'Q Search' button. Below the search area is a section titled 'Search results' with the text 'Showing 1 to 2 of 2 results' on the right.


Figure 5 Search for 'equella 6.2'

Note that there is only one matching suggestion for '*equella* 6.2', which means there is only one resource in the EQUELLA repository containing '*equella* 6.2' in its title.

Selecting a suggestion

Selecting a suggestion from the drop-down list by clicking on it, or highlighting it using the keyboard arrows, replaces what is currently in the Search text box with the selected value.

The top suggestion always defaults in the search text box in light gray. Use the **TAB** key or the right arrow → to select this suggestion.

Click  or **Enter** to return matching results.

Multiple word autocomplete

If the user types in a single word (e.g. *equella*), the suggestions will be resources with the word '*equella*' in their titles. But if the user types in '*equella features*', the suggestions will be resources that have '*equella features*' in their titles in that exact order. An example is shown in Figure 6.

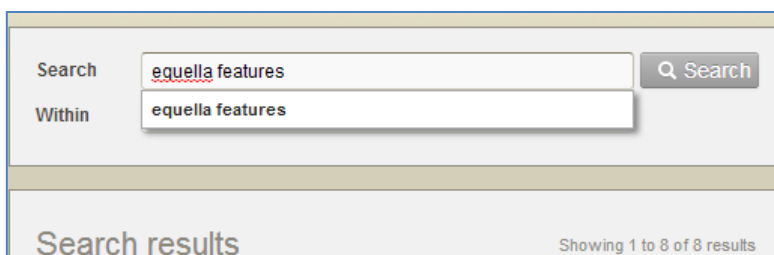
The screenshot shows a search interface with a 'Search' label and a text input field containing 'equella features'. Below the input field is a 'Within' label and a dropdown menu showing 'equella features'. To the right of the input field is a 'Q Search' button. Below the search area is a section titled 'Search results' with the text 'Showing 1 to 8 of 8 results' on the right.

Figure 6 Multiple word autocomplete

If a user wants to find resources using multiple keywords (e.g. *equella* + *guide*), and there are no resources that contain the words in the exact order, the autocomplete function will suggest single words, based on words used in resource titles in the repository. An example is shown in Figure 7.

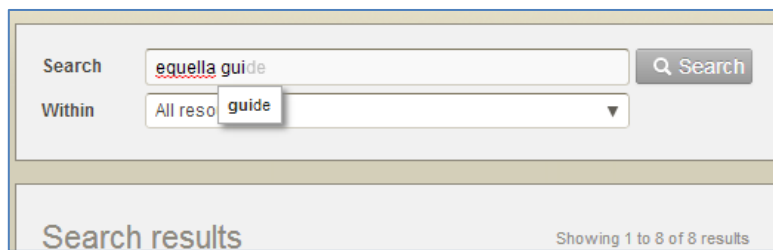


Figure 7 Single word autocomplete

Stemming

EQUELLA also uses 'stemming' in searching. Stemming is where the system recognises the root (stem) of a word, and performs the search using the root term instead. For example, if 'cooks' was entered as a search criterion, the system performs a search for 'cook' (the stem word) and resources containing this stem would be returned, such as 'cooking' and 'cooked'.

An example is shown in Figure 8.

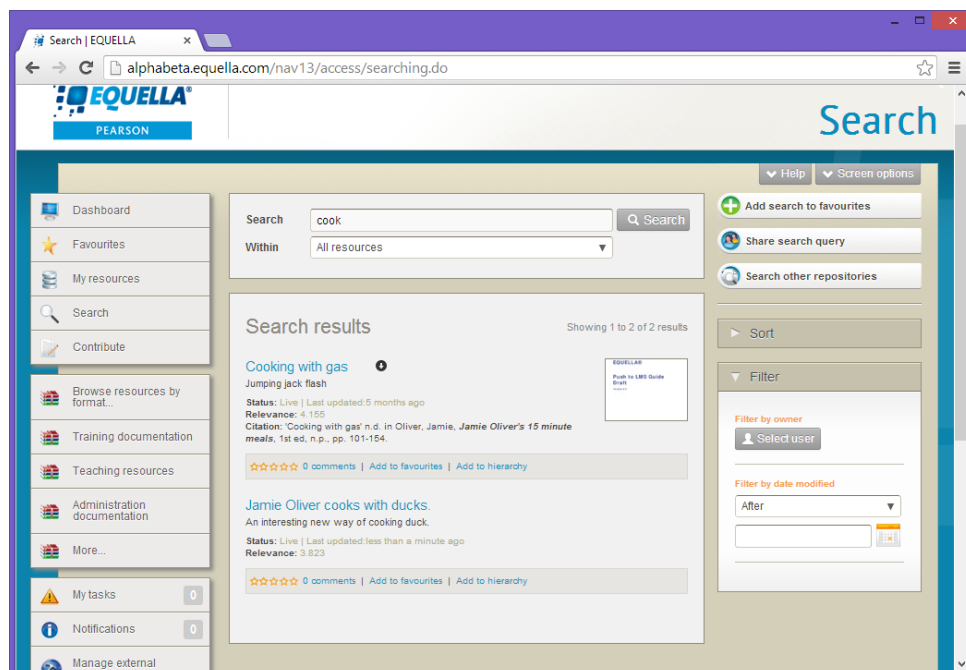


Figure 8 Use of 'stemming' in searching

Multiple keywords

Multiple keywords can be entered in the following ways:

- **Multiple keywords with a space between each word**—entering two or more keywords with a space between each word will return results that have all of the entered keywords. For example, entering *equella features* will display resources that have **both equella and features** in its title, description or attachment name. An example is shown in Figure 9.

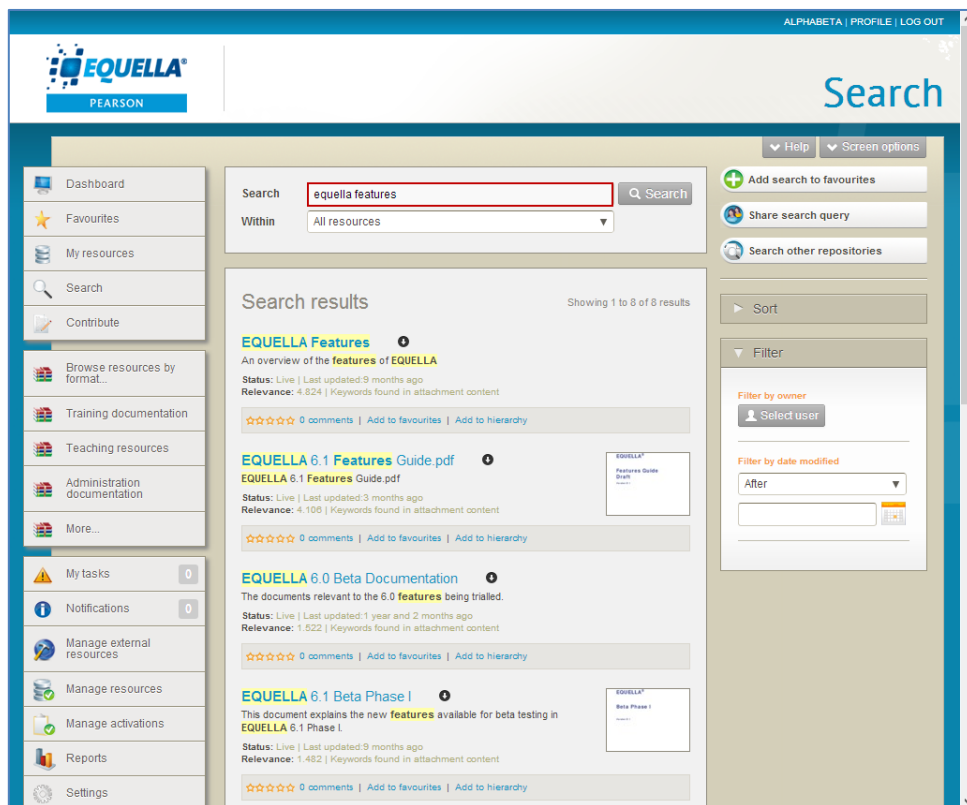


Figure 9 Multiple word search results

(NOTE: Each keyword match is highlighted in yellow.)

- **Multiple keyword with 'or'**—entering two or more keywords with a '**or**' between each will return resources that contain either all or one of the keywords. For example, entering '*equella or features*' will display resources that have one or both words contained within its title, description or attachment name, with the ones containing both words at the top. An example is shown in Figure 10.

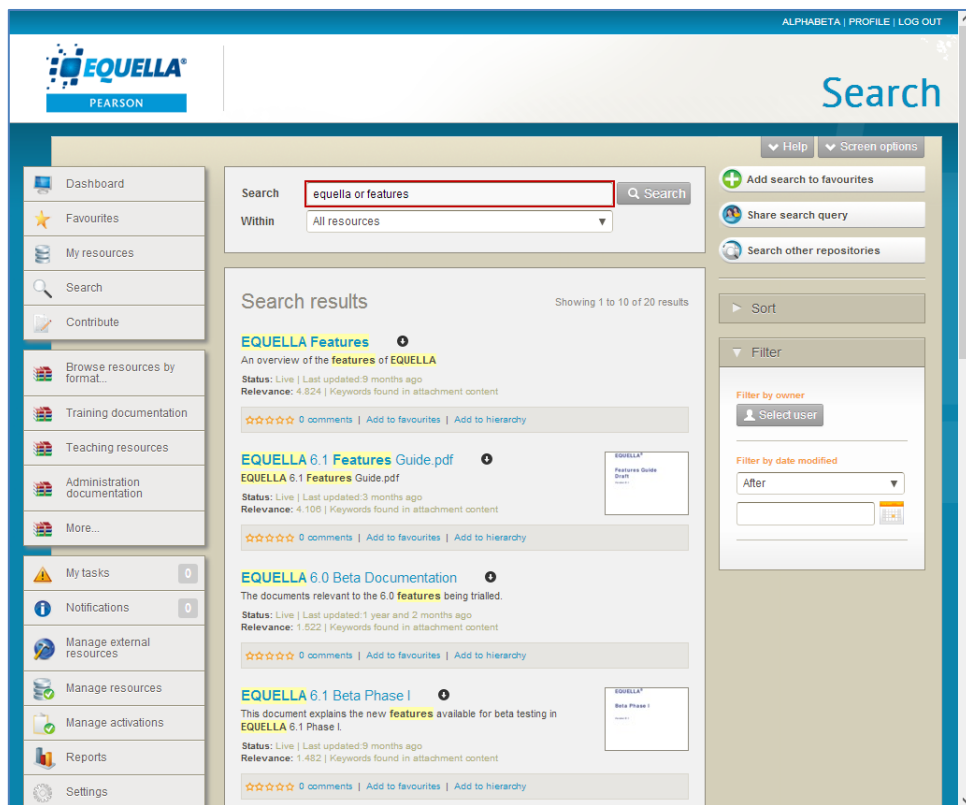


Figure 10 Multiple keywords with +

(NOTE: Each keyword match is highlighted in yellow.)

Use of a wildcard (*)

The definition of a wildcard is a character that can be used to substitute for any other character or characters in a string. This comes in handy if the user is unsure of spelling or wants to find a range of results that start with a certain character or string of characters.

In EQUELLA, a user can enter a character or string of characters with the wildcard (*) to find any resources that start with that value. For example, the user could enter **tas*** to return any resources that contain the word tasmania. Any other resources containing words starting with the character string 'tas' will also be returned (e.g. **taste**, **tassel** etc.).

A wildcard can also be placed in the middle of two characters or character strings. For example, entering **t*a** will also return any resources containing the word tasmania, as well as any resources containing a word starting with *t* and ending in *a* (e.g. *tarantula*, *tea* etc.).

(NOTE: Wildcards cannot be used at the beginning of a search term.)

Relevance scores and searching attachments

Relevance scores display for each result when a search term or terms have been entered and the sort order is set at *Relevance*. The relevance score is a number calculated using an algorithm based on the boost values set for title, metadata and attachments. The higher the number, the more relevant the result to the search criteria. An example is shown in Figure 11.

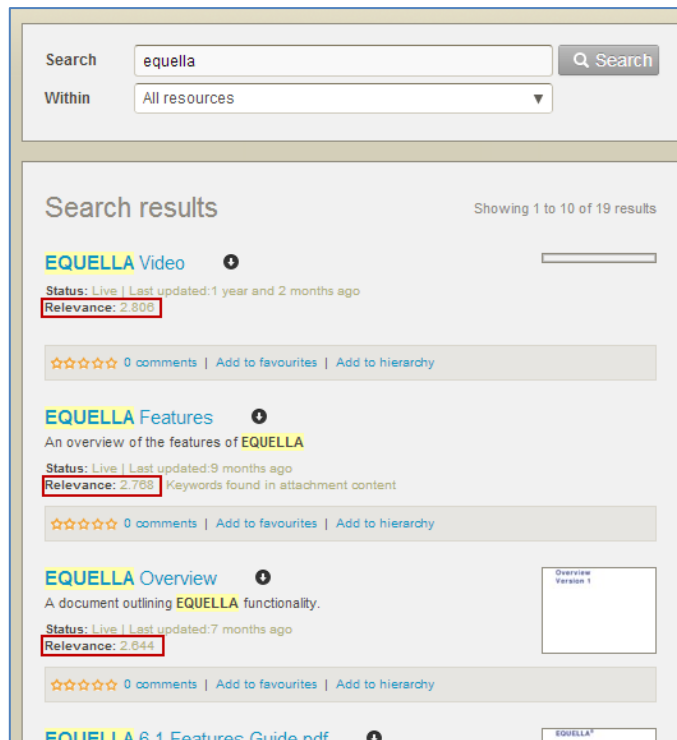


Figure 11 Relevance scores

Additionally, if attachments have a boost value set to something other than *Off* (that is, attachment names and content are searched for matches to the search terms), and matches are found, *Keywords found in attachment content* displays next to the Relevance score. An example is shown in Figure 12.



Figure 12 Keywords found in attachment content message

If the boost value for attachments is set at any value besides *Off*, individual users may toggle the attachment search from the Results page **Screen options**. This allows users to choose whether they want their keyword searches to look in attachments, or only in the resource title and metadata. An example is shown in Figure 13.

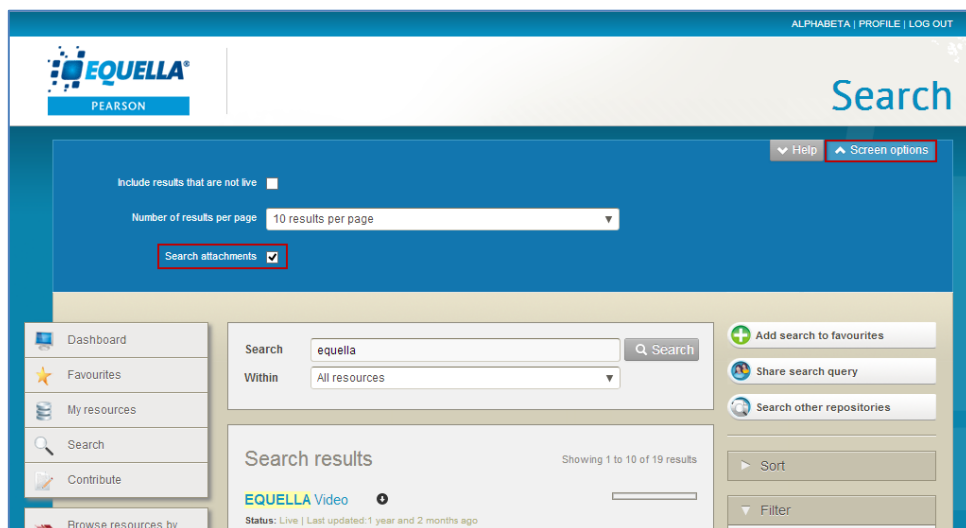


Figure 13 Search attachments toggle option

See [Searching terms boost](#) on page 67 for further information.

Quick search

The **Quick search** portlet is found on the EQUELLA Dashboard page, and allows the user to perform simple keyword searches using the search edit box. An example is shown in Figure 14.

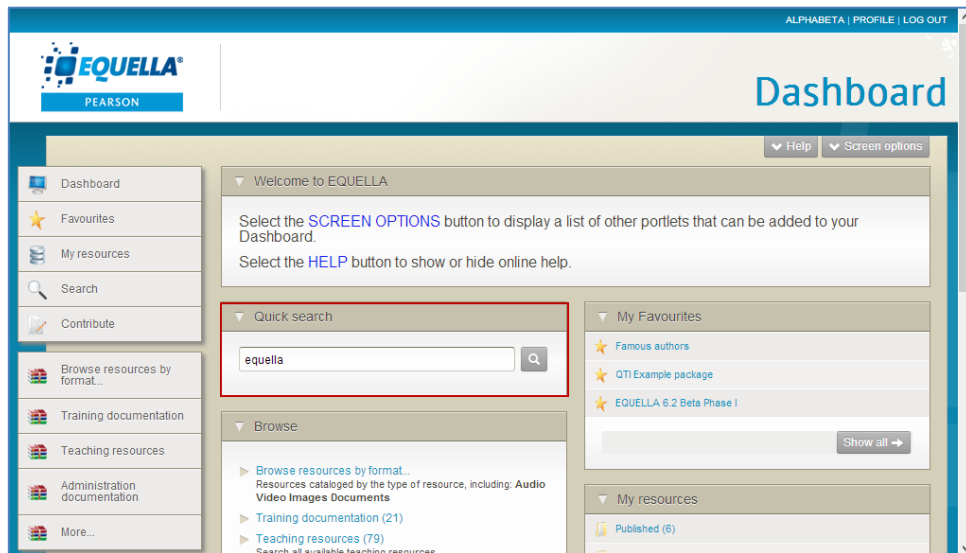



Figure 14 Quick search portlet

To perform a search using the Quick search portlet

1. Using one of the methods outlined above, enter keywords (e.g. *equella*) in the search field
2. Click the search  button or press **Enter** to return matching results. The **Search** page opens with the results displayed. An example is shown in Figure 15.

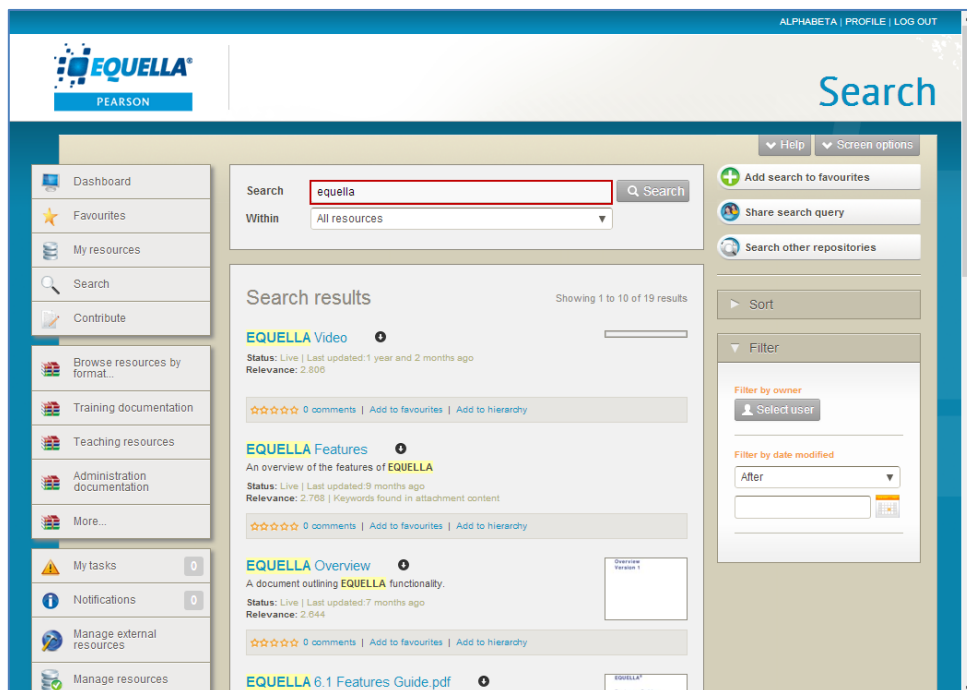


Figure 15 Search page with search results

Search page

The **Search page** allows the user to search resources using simple keyword searches, but also provides the ability to search within particular collections or perform more complex searches such as advanced searches and remote repository searches. The search page is accessed by selecting **Search** from the navigation menu, as shown in Figure 16.

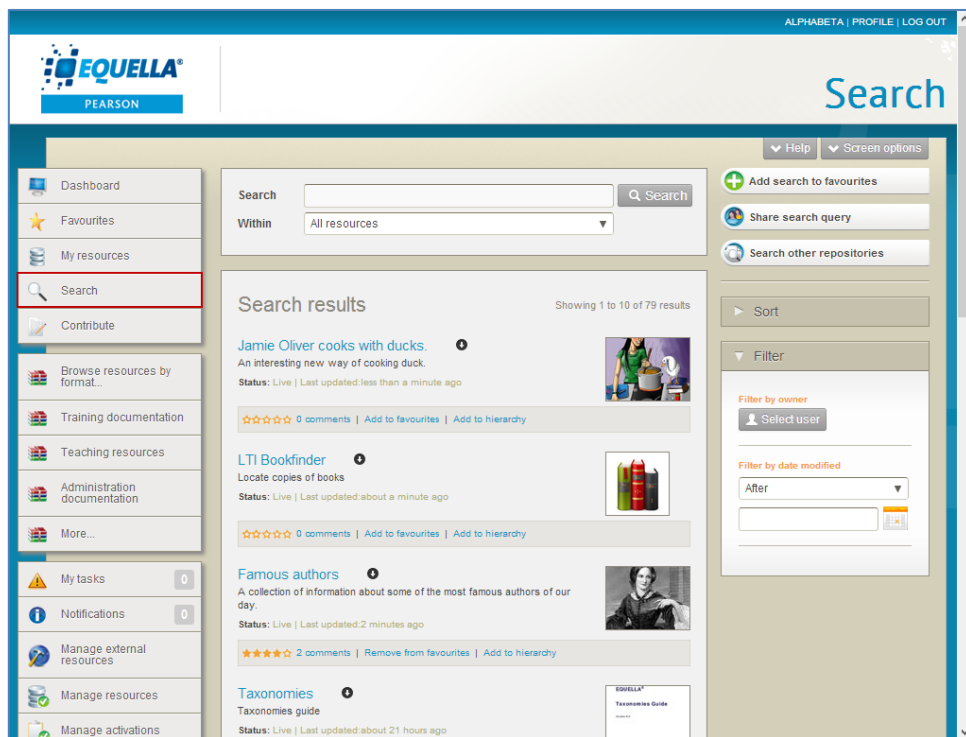


Figure 16 Search menu item

On first logging into EQUELLA and selecting the search page, the search results default is **All resources**. If the user leaves the search page after changing the search criteria, on returning to the search page, the last criteria selected will be the default.

The **Search** page has the **Search box** at the top, where criteria are selected, and the results list displayed below. An example is shown in Figure 17.

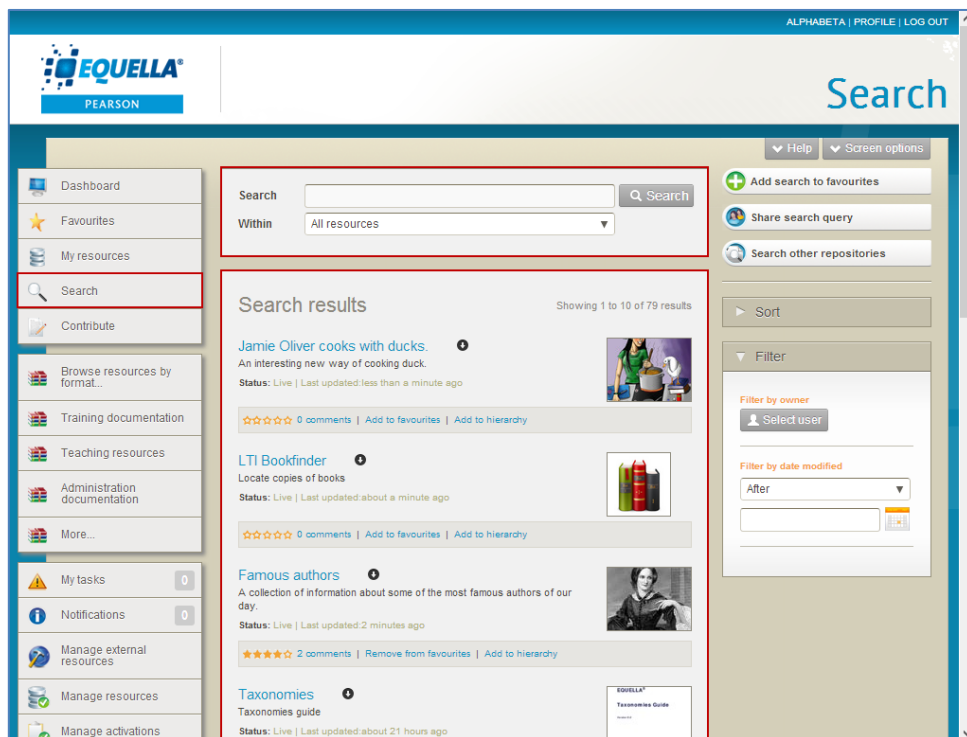


Figure 17 Search box and results list

The user can enter keywords in the search text box, and use the **Within** drop-down list to further qualify results. A value can be selected from the **Within** drop-down box without entering keywords in the search text box.

Search options

Searching can be refined by selecting a collection, advanced search, remote repository or all resources from the **Within** search categories in the **Search** box. An example is shown in Figure 18.

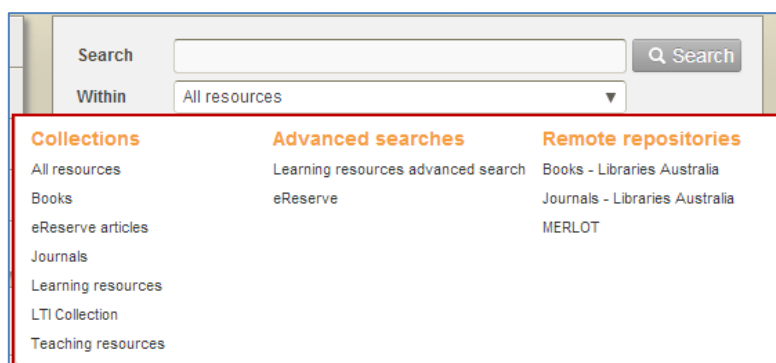


Figure 18 Within search categories

Search by Collection

Click the **Within** drop-down arrow to display the available search categories. An example is shown in Figure 19.

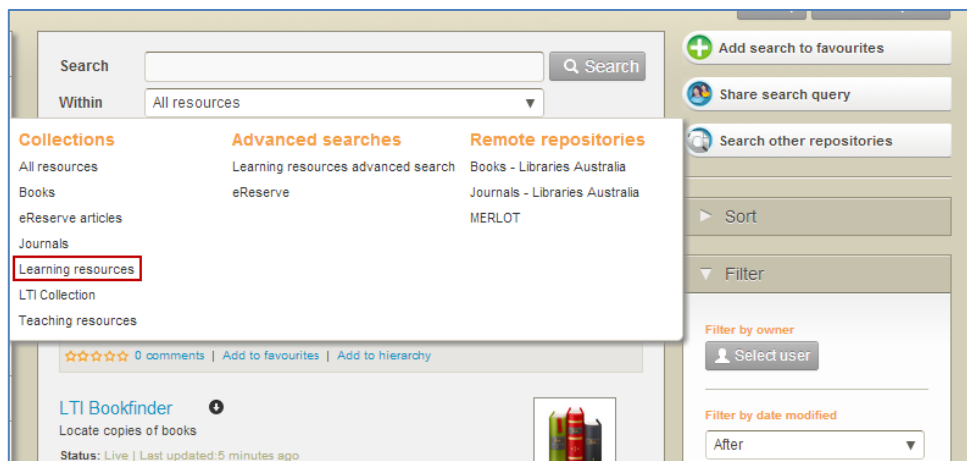


Figure 19 Select a collection

Select a collection (e.g. *Learning resources*) from the **Collections** list to display only resources belonging to that collection. If the **Search** field is left blank, all resources belonging to the selected collection are displayed.

Advanced search

An advanced search provides a means of searching specifically within the metadata (information) associated with resources. It makes searching for a particular resource easier, and can be targeted to specific users, groups or roles.

To conduct an advanced search

1. Click the **Within** drop-down arrow to display the available search categories. An example is shown in Figure 20.

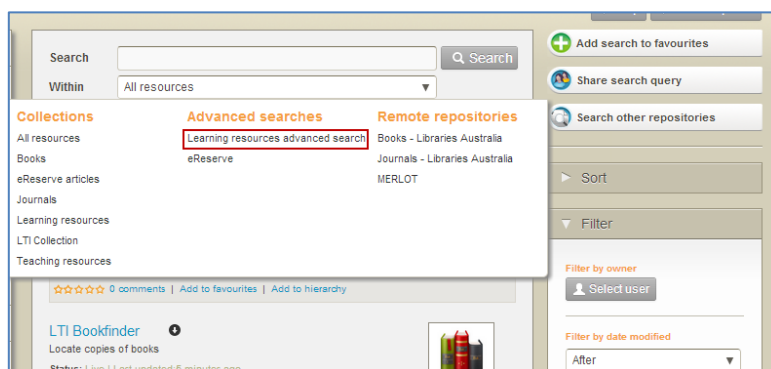


Figure 20 Select an advanced search

2. Select an advanced search (e.g. *Learning resources advanced search*) from the **Advanced searches** list. The advanced search criteria page displays. An example is shown in Figure 21.

Search

Within

Format of resource

☐ Audio ☐ Video ☐ Image

☐ Document ☐ Other

Aggregation level

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

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

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

☐ Level 4 - Largest level of granularity, e.g. a course.

Learning resource type

Please select one or more types

<input type="checkbox"/> Diagram	<input type="checkbox"/> Exam	<input type="checkbox"/> Exercise
<input type="checkbox"/> Figure	<input type="checkbox"/> Graph	<input type="checkbox"/> Index
<input type="checkbox"/> Lab demonstration	<input type="checkbox"/> Lecture	<input type="checkbox"/> Narrative text
<input type="checkbox"/> Problem statement	<input type="checkbox"/> Questionnaire	<input type="checkbox"/> Self assessment
<input type="checkbox"/> Simulation	<input type="checkbox"/> Slide	<input type="checkbox"/> Table
<input type="checkbox"/> Diagram	<input type="checkbox"/> Exam	<input type="checkbox"/> Exercise
<input type="checkbox"/> Figure	<input type="checkbox"/> Graph	<input type="checkbox"/> Index
<input type="checkbox"/> Lab demonstration	<input type="checkbox"/> Lecture	<input type="checkbox"/> Narrative text
<input type="checkbox"/> Problem statement	<input type="checkbox"/> Questionnaire	

Figure 21 Advanced search criteria page

(NOTE: The appearance of the Advanced search criteria screen depends on the design of the selected search.)

3. Select some criteria (e.g. *Image* in the **Format of resource** section) and click to display the search results page with search criteria in place. An example is shown in Figure 22.

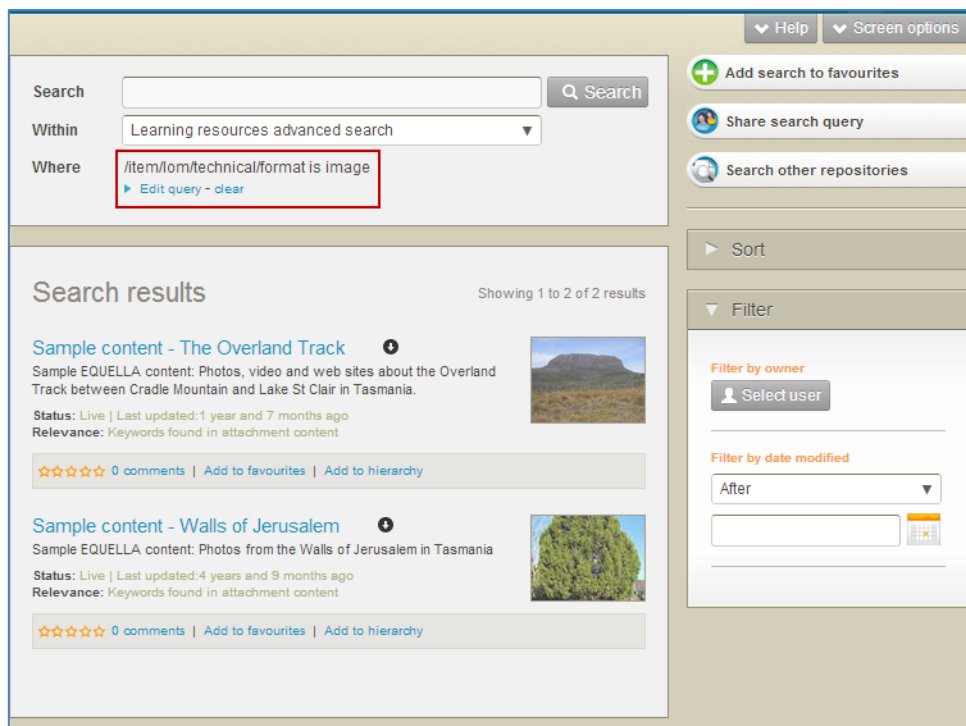


Figure 22 Advanced Search criteria in place

An additional **Where** section is added to the **Search** pane, as shown in Figure 22.

4. Select the **Edit query** link from the search pane to open the advanced search criteria page and change or refine the search criteria, or the **clear** link to remove the criteria.

See the *EQUELLA Advanced Search Configuration Guide* for information on creating advanced searches.




Search results pages

Search result pages display a list of resources matching the search criteria, including the resource title, description, status information and comments and ratings. Clicking on the title link opens the resource summary page.


Other features common to search result pages include:

- **Help** —expand this section to display the context sensitive help for this page.
- **Screen options** —expand this section to display the following configuration options:
 - **Number of results per page** – select 10, 50 or 100
 - **Include results that are not live** – select this checkbox to show resources that have a status other than live (e.g. Moderating, archived etc.)
 - **Search attachments** - uncheck this checkbox if attachments are not to be searched as part of keyword searches. When this is unchecked, search results will be based on matches found in the resource title, description and searchable metadata.

Note: This option does not display if attachment searching has been switched off at an institution level.

-  **Add search to favourites**—click to save the current search with a name to the Favourites search section. See [Add search to favourites](#) on page 22 for more information.
-  **Share search query**—search results can be shared with other users by sending them the search results for their use. See [Share search query](#) on page 23 for more information.
-  **Search other repositories**—external repositories can be searched and the results imported directly to a contribution wizard. See [Search Remote repositories](#) on page 27 for more information.
- **Sort** box—provides options for sorting the results list. See [Sorting and filtering](#) on page 23 for more information.
- **Filter** box—provides options for setting criteria to drill down to relevant search results. See [Sorting and filtering](#) on page 23 for more information.

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 23.

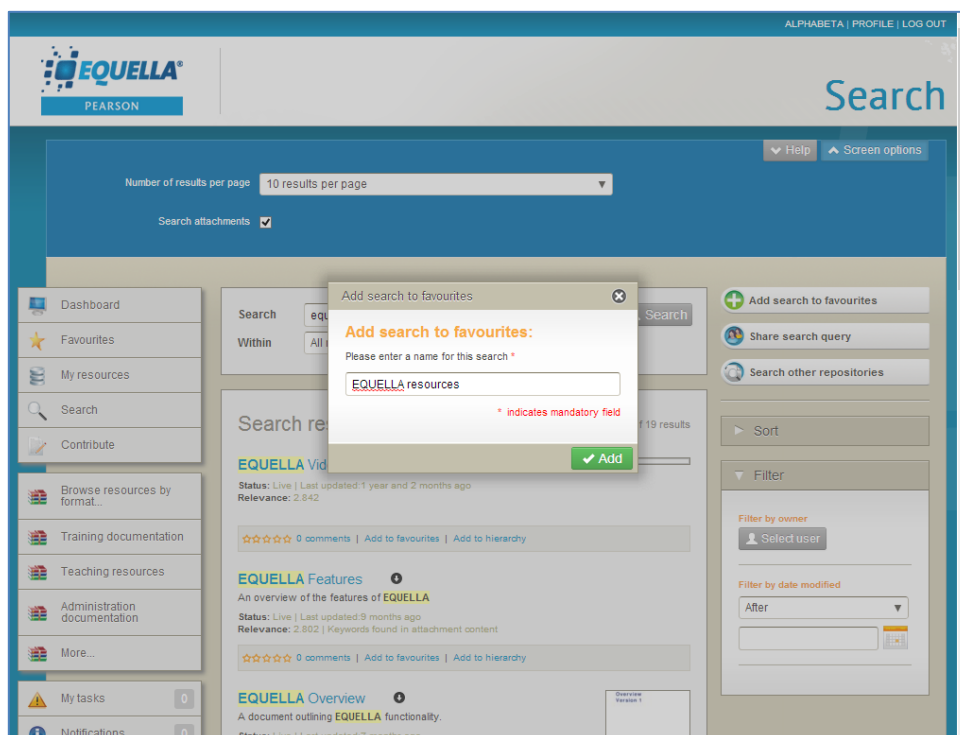




Figure 23 Add search to favourites dialog

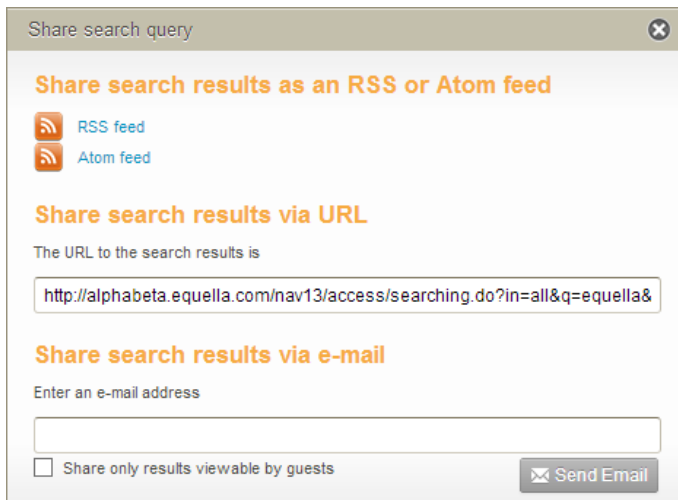
Clicking  **Add** displays a 'Successfully added this search to your favourites' message and adds the search to your Favourite searches list.

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 the  button 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 24.



The dialog box titled "Share search query" contains three sections. The first section, "Share search results as an RSS or Atom feed", has two links: "RSS feed" and "Atom feed". The second section, "Share search results via URL", shows a text box with the URL "http://alphabet.equilla.com/nav13/access/searching.do?in=all&q=equilla&". The third section, "Share search results via e-mail", has a text box for an email address, a checkbox labeled "Share only results viewable by guests", and a "Send Email" button.

Figure 24 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 EQUILLA 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 . Check the **Share only results viewable by guests** checkbox if sending to users outside your institution.

Sorting and filtering

Once search results display on the results screen, resources can be sorted and filtered to drill down to the most relevant results. Every results page in the EQUILLA system has sorting and filtering options, and these options may change, or additional options may display, depending on the type of results list. For example, the My resources results page has different filter options (*Filter by keyword, Filter by collection and Filter by date modified*) than the Search results page (*Filter by owner, Filter by data modified*). An example is shown in Figure 25.

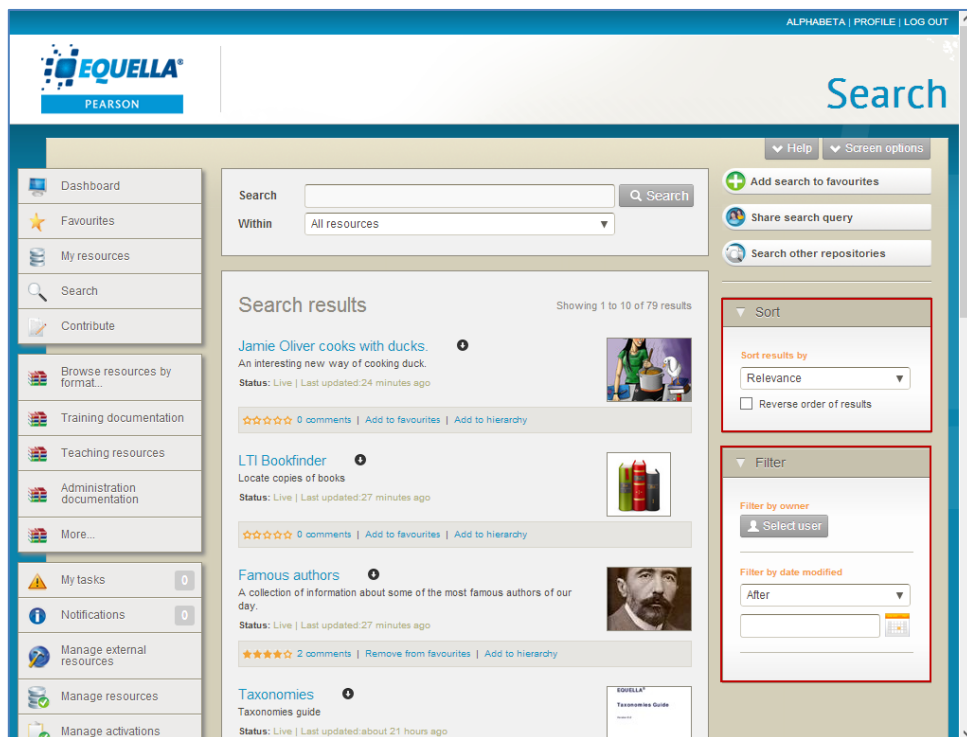


Figure 25 Sort and filter panels

Sort results



The **Sort** box provides options for sorting the results list. Clicking the toggle  /  buttons shows or hides the box. An example is shown in Figure 26.

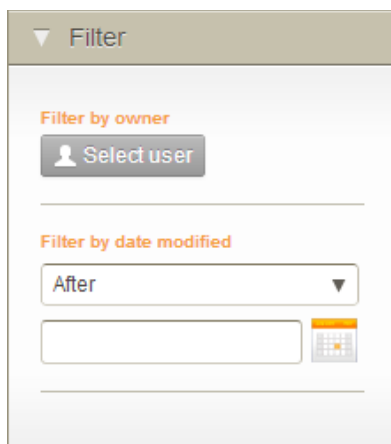


Figure 26 Sort box

The **Sort results by** drop-down list can include: **Relevance**, **Date last modified**, **Title** or **User rating**. Selecting 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 (shown in Figure 27) provides options for reducing the number of displayed results.





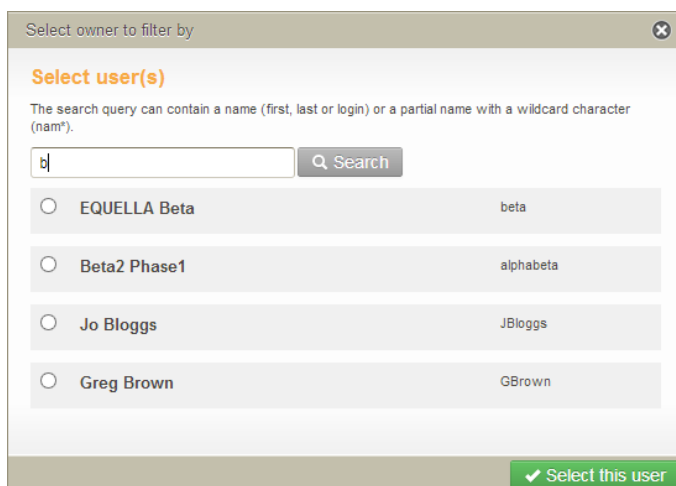
The image shows a 'Filter' dialog box. It has a title bar with a dropdown arrow and the word 'Filter'. Inside, there are two sections. The first section is titled 'Filter by owner' and contains a button with a person icon and the text 'Select user'. The second section is titled 'Filter by date modified' and contains a dropdown menu with 'After' selected, an empty text input field, and a calendar icon.

Figure 27 Filter box

The following filters are included:


Filter by owner

Click  to display the **Select owner to filter by dialog**. Enter search terms and click  to display a list of matching results. An example is shown in Figure 28.



The image shows a 'Select owner to filter by' dialog box. It has a title bar with the text 'Select owner to filter by' and a close button. Inside, there is a section titled 'Select user(s)' with a subtext: 'The search query can contain a name (first, last or login) or a partial name with a wildcard character (name*).' Below this is a search input field containing 'b' and a 'Search' button. A list of users is displayed below the search field, each with a radio button, a name, and a login ID. The users are: EQUELLA Beta (beta), Beta2 Phase1 (alphabet), Jo Bloggs (JBloggs), and Greg Brown (GBrown). At the bottom right, there is a green button with a checkmark and the text 'Select this user'.

Figure 28 Select owner to filter by dialog

Select a user (e.g. *Jo Bloggs*) then click  to filter the results to those owned by the selected user. The selected owner is displayed in the **Filter by owner** pane. An example is shown in Figure 29.

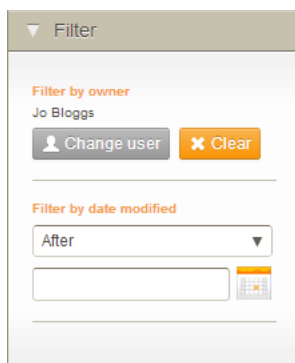
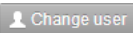



Figure 29 Filter by owner pane

The owner selected can be changed by clicking , or removed by clicking .

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 30.

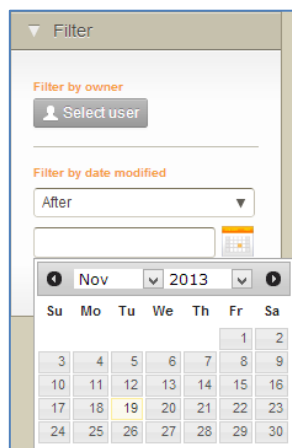


Figure 30 Calendar control

Select the **Clear** link to remove the filtering criteria.

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 31.

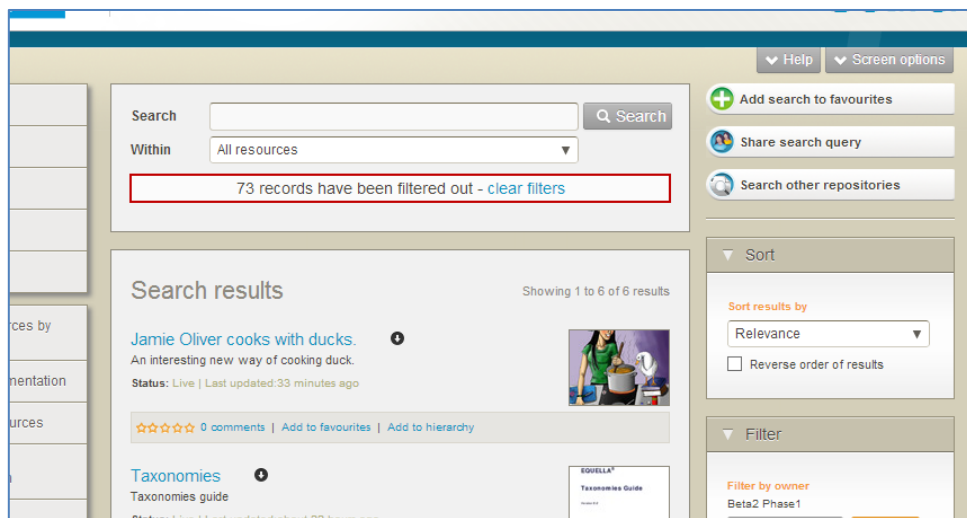


Figure 31 Filter message

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

Search Remote repositories

External (remote) repositories can be searched and the results imported directly to a contribution wizard. Using this search method can increase accuracy and save time entering information manually.

To conduct an external repository search

1. Click the **Within** drop-down arrow to display the available search categories, then select a remote repository from the **Remote repositories** list (e.g. **MERLOT**). An example is shown in Figure 32. The MERLOT searching page opens (see Figure 34 below). Alternatively, click the [Search other repositories](#) button from the right-hand side of the page to display the **Remote repositories** page. An example is shown in Figure 33.

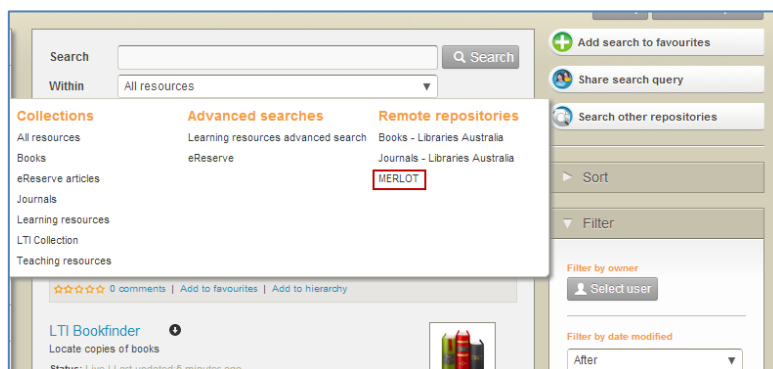


Figure 32 Access Remote repositories search

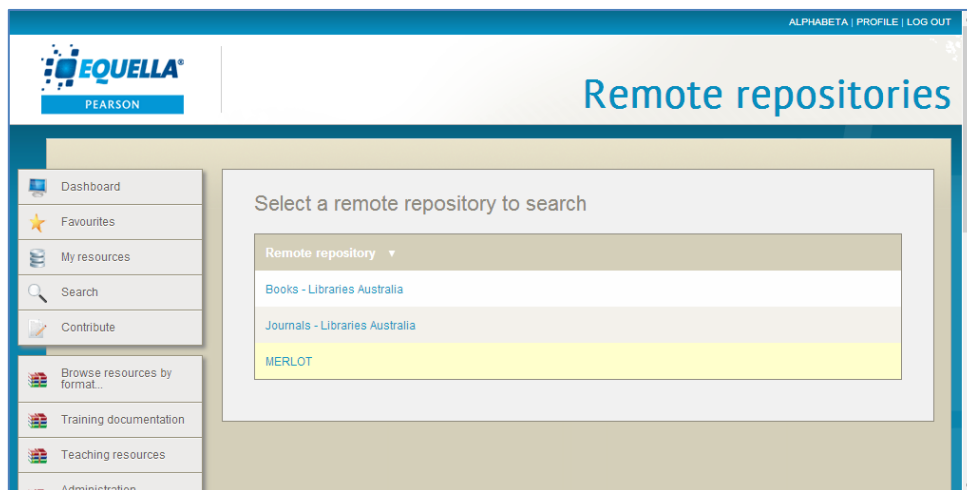


Figure 33 Remote repositories page

2. Select a repository (e.g. *MERLOT*) to display the associated **Searching** page and filters. An example is shown in Figure 34.

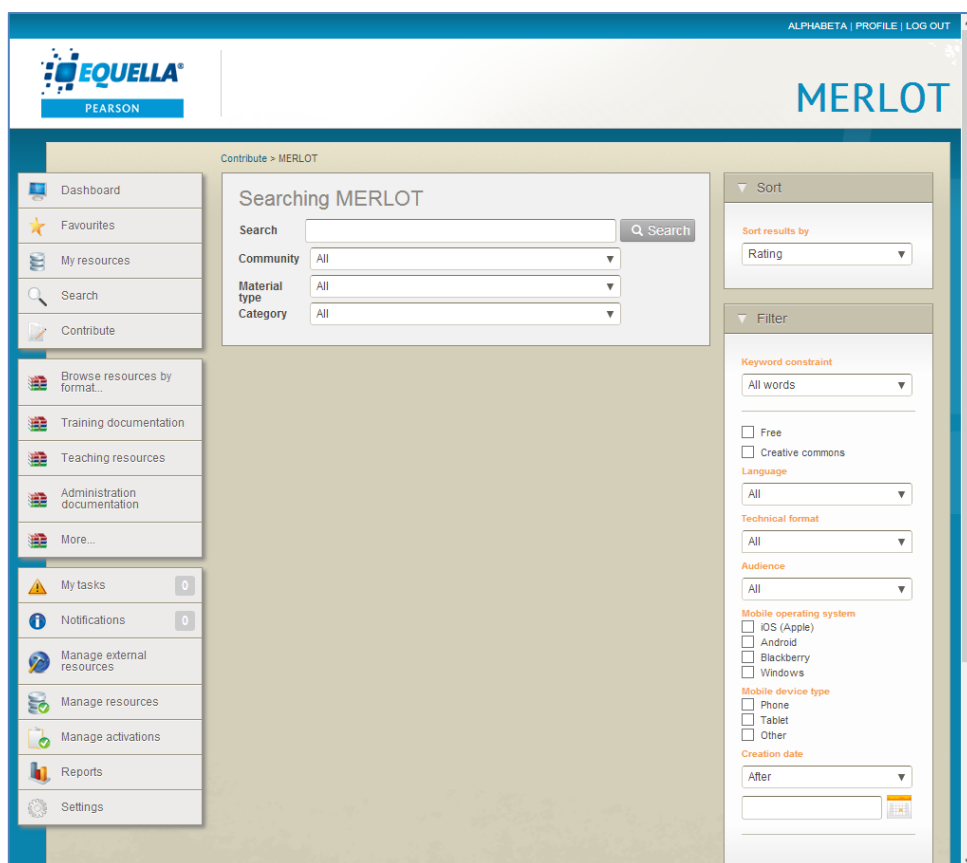



Figure 34 MERLOT Searching page

3. Enter search terms (e.g. *Project management*) and click  to return matching results. An example is shown in Figure 35.

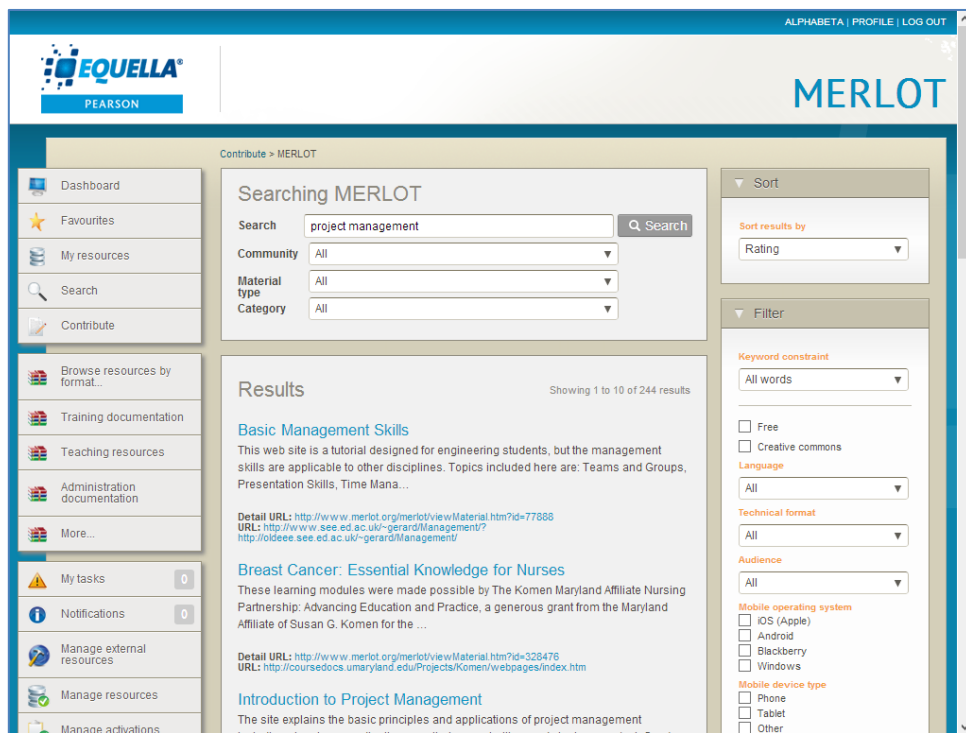


Figure 35 Remote repositories search results

MERLOT sort and filter options

The MERLOT search results page has **Sort** and **Filter** boxes to the right-hand side of the page. An example of the **Sort** box is shown in Figure 36 and an example of the **Filter** box is shown in Figure 37.

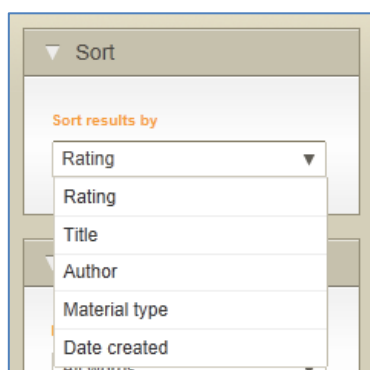


Figure 36 MERLOT Sort box

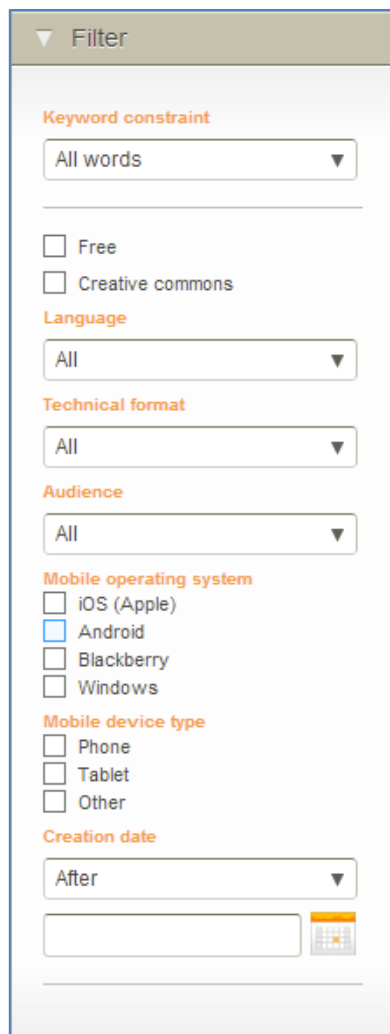
The image shows a vertical filter box with a title bar at the top that says "Filter" with a downward arrow. Below the title bar, there are several sections of filters. The first section is "Keyword constraint" with a dropdown menu set to "All words". The second section has two checkboxes: "Free" and "Creative commons", both of which are unchecked. The third section is "Language" with a dropdown menu set to "All". The fourth section is "Technical format" with a dropdown menu set to "All". The fifth section is "Audience" with a dropdown menu set to "All". The sixth section is "Mobile operating system" with four checkboxes: "iOS (Apple)" (unchecked), "Android" (checked), "Blackberry" (unchecked), and "Windows" (unchecked). The seventh section is "Mobile device type" with three checkboxes: "Phone" (unchecked), "Tablet" (unchecked), and "Other" (unchecked). The eighth section is "Creation date" with a dropdown menu set to "After" and a date picker icon to its right. Below the date picker is an empty text input field.

Figure 37 MERLOT Filter box


Most of the options in these sort and filter boxes are specific to MERLOT so won't appear on other search result pages.

Select a resource from the **Results** list (e.g. *Introduction to Project Management*) to display the resource details. An example is shown in Figure 38.

The screenshot shows the MERLOT interface. At the top, there's a navigation bar with 'ALPHABETA | PROFILE | LOG OUT' and the 'MERLOT' logo. Below this, a breadcrumb trail reads 'Contribute > MERLOT > Introduction to Project Management'. The main content area displays details for the resource 'Introduction to Project Management' (URL: <http://www.twproject.com/>). The details include a description, a detail URL (<http://www.merlot.org/merlot/viewMaterial.htm?id=90038>), a creation date of 13 years and 8 months ago, and a modified date of 2 years and 3 months ago. It also lists categories (Business/Management, Business/Management/Org Behavior and Development, Business/Management/Production and Oper Mgmt), creative commons status (no), audiences (College General Ed), languages (English), copyright (yes), free status (yes), material type (Reference Material), section 508 compliance (no), source availability (no), comments URL (<http://www.merlot.org/merlot/comments.htm?material=90038>), personal collections URL (<http://www.merlot.org/merlot/portfolios.htm?material=90038>), and peer review URL (<http://www.merlot.org/merlot/reviews.htm?material=90038>). At the bottom, there's a disclaimer about the MERLOT Remote Repository and a Creative Commons license, followed by the MERLOT logo and a green 'Import' button.

Figure 38 Resource details

To import results

1. Click  to display a contribution wizard. The collection is defined in the Administration Console—Remote Repositories tool. (See the *EQUELLA Remote*

Repositories Configuration Guide for more information.) An example is shown in Figure 39.

ALPHABETA | PROFILE | LOG OUT

EQUELLA
PEARSON

Learning resources

Contribute > Learning resources

About

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

Introduction to Project Management

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

The site explains the basic principles and applications of project management including planning, coordinating, monitoring, controlling, and closing a project. Can be used in connection with a team building process, or as a tool to teaching general management, operations management, or marketing

Media
Please select the media to attach to your item

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

Add HTML
[Toggle full-screen](#)

Save
Save and continue | Preview | Cancel

About

Figure 39 Contribution wizard with pre-filled fields

See the *EQUELLA Contribution User Guide* for more information on contributing resources.

Other remote repository types

Search boxes and sorting and filtering options may differ depending on the types of remote repositories set up in your EQUELLA system. An example of the Libraries Australia remote repository search results screen is shown in Figure 40.

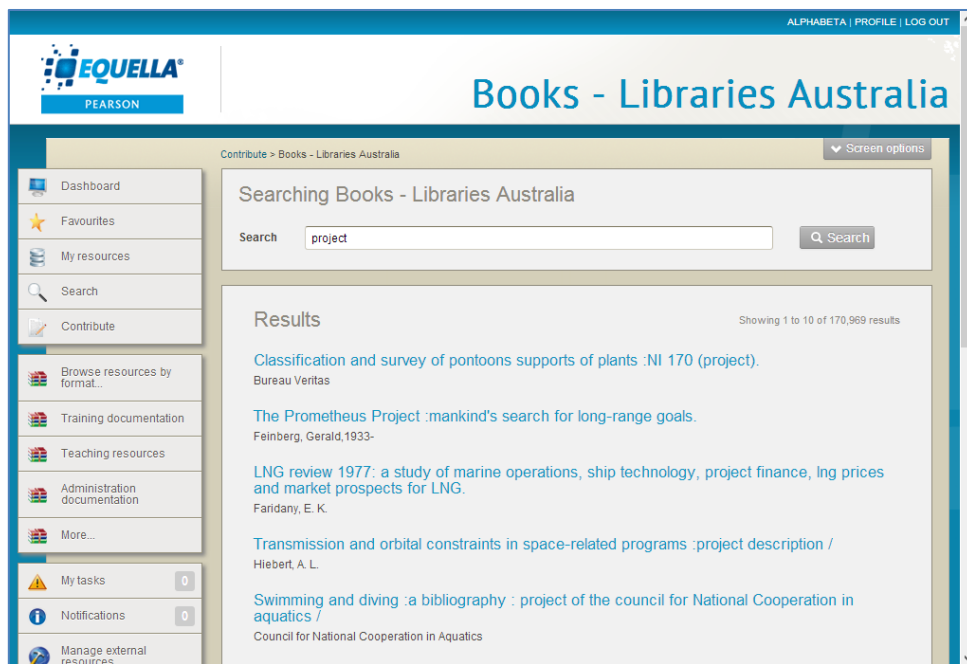


Figure 40 Libraries Australia search results page

(NOTE: there are no sort or filter options for this type of remote repository search.)

Favourites

Users can save bookmarks to resources and searches they find useful by using EQUELLA's 'Favourites' functionality. Depending on how your EQUELLA system is configured, resources and searches added to favourites are listed as links in the **My Favourites** portlet on the Dashboard page. Select a link to go straight to the resource summary page for a resource, or the search results page for a search.

The Favourites page is accessed by selecting **Favourites** from the navigation menu. An example showing both access points is shown in Figure 41.

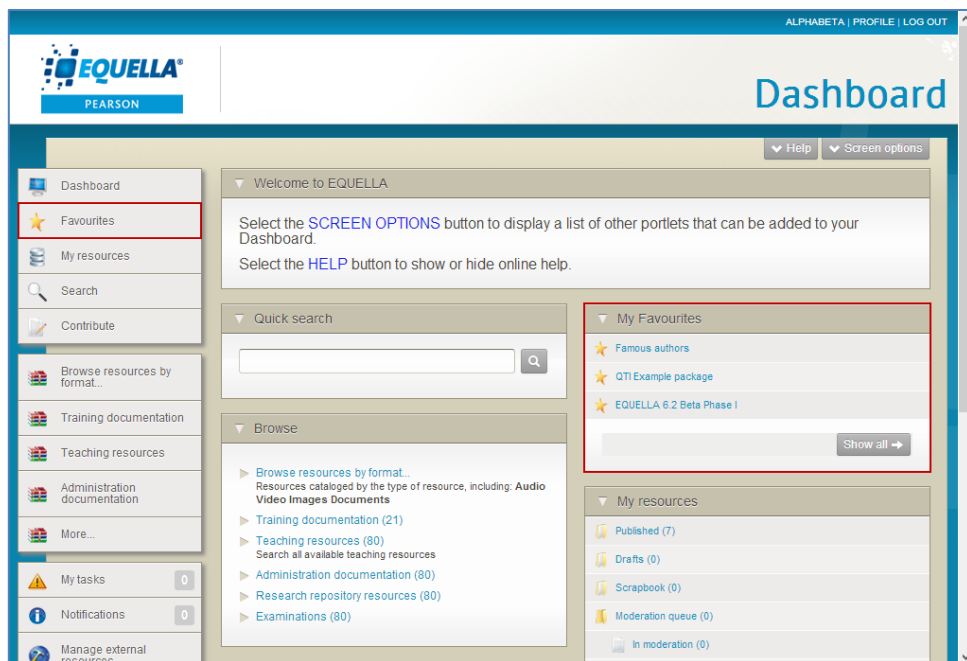


Figure 41 Access to Favourites

Selecting the **Favourites** link from the navigation menu opens the **Favourites** page which consists of two main sections, **Resources** and **Searches**. Selecting the link to either one under the *Favourites* heading will switch the list of results. The link to the current list is disabled.

Resources

The **Resources** list contains the same resource details as a search results list, with the addition of two further fields, as highlighted in Figure 42. A **Tags** field lists the tag values entered into the dialog when adding the resource to favourites. (See *EQUELLA My Resources User Guide* for more information on adding resources to favourites.) This field is not visible if no tags have been set. A **Date favourited** field shows how much time has passed since this resource was added to favourites.

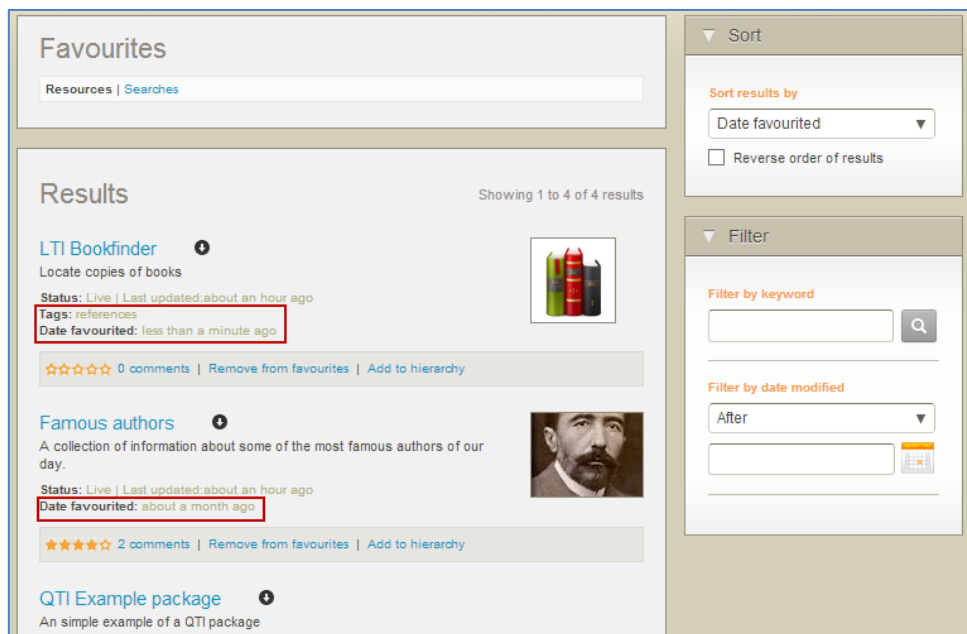


Figure 42 Favourite resources

Sort and filter


On the **Resources** favourite page, the **Sort** and **Filter** boxes have some additional options not found on the Search results page.

In addition to **Relevance**, **Date last modified**, **Title** and **User rating**, there is a **Date favoured** option. Selecting this option will sort the resources in order of the date they were added to favourites.

The **Filter** box has a **Filter by keyword** edit box, which allows the user to search by keywords within the favourites resource list. The system searches for matching keywords in the resource title, description, attachment name and tags fields. The favourites filter box doesn't have the **User** filter.

Searches

Each search in this list may display the following (an example is shown in Figure 43):

- a name, set when adding the search to favourites. (See [Add search to favourites](#) on page 22 for more information). Selecting the name link takes the user to the search results page when clicked.
- the search criteria that was requested, for example 'equella' in the search text box, 'Published' from My Resources etc.
- a  Remove button. Clicking this button will remove the search from the list of favourites.

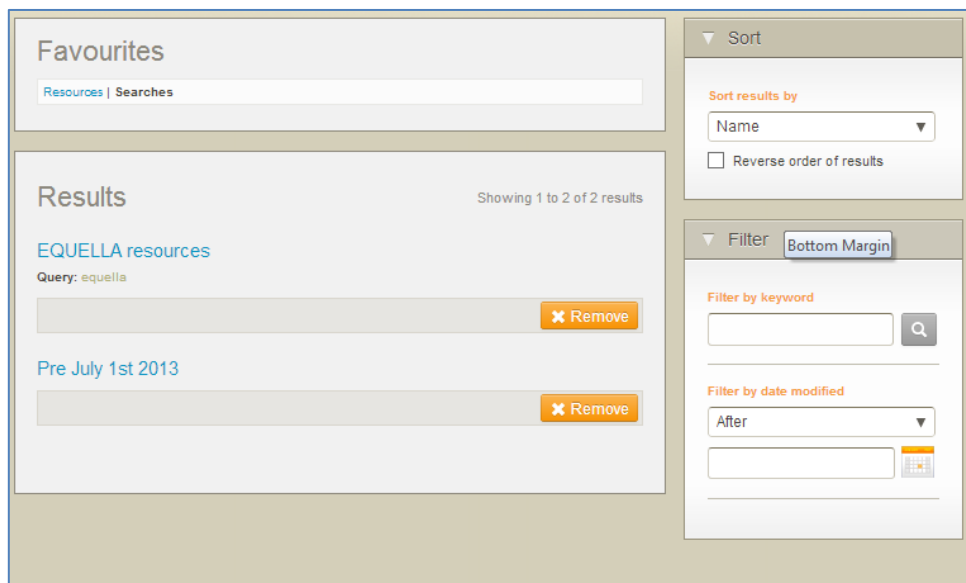


Figure 43 Favourite searches

Sort and filter

On the **Searches** favourite page, the **Sort** and **Filter** boxes have some additional options not found on the Search results page.

In addition to **Relevance**, **Date last modified**, **Title** and **User rating**, there is a **Date favoured** option. Selecting this option will sort the searches in order of the date they were added to favourites.

From the Favourites | Searches results page, the following filter options are available:

- **Filter by keyword**—allows the user to enter keywords to search within the My resources page. The system searches for matching keywords in the resource title, description and attachment name.
- **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.

My resources

My resources displays resources that belong to the currently logged in user.

Pre-defined criteria are displayed as links 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 44.

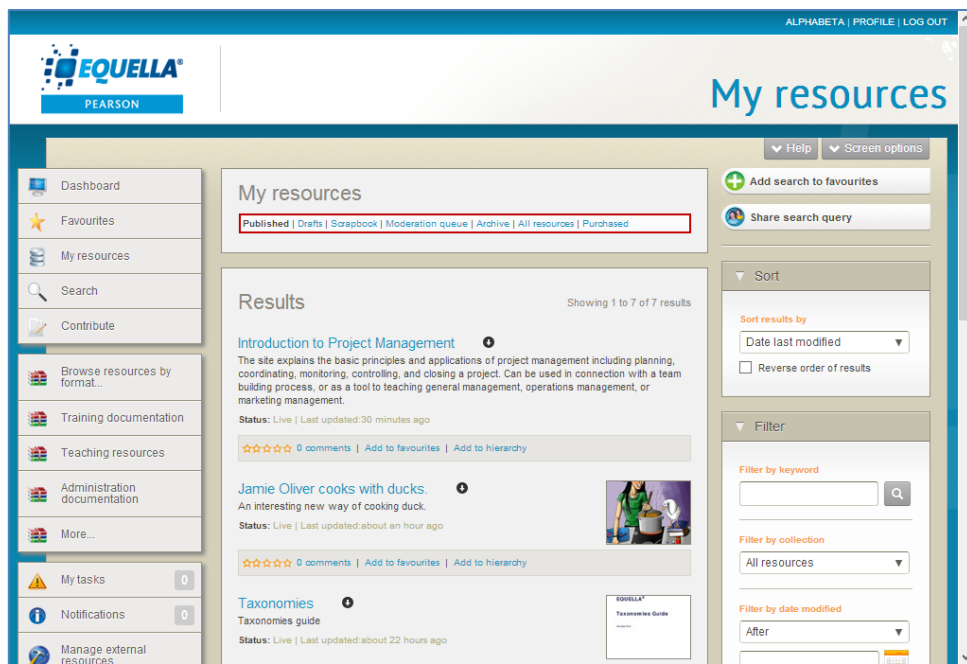


Figure 44 My resources grouping links

Click on 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.
- **Moderation queue**—resources that have been submitted for moderation, and are still at some point in the moderation workflow.
- **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.
- **Purchased**—resources that have been purchased using the EQUELLA Store front function. (See the *EQUELLA Store Front User Guide* for further information.)

Filter

From the My resources results pages, the following filter options may be available:

- **Filter by keyword**—allows the user to enter keywords to search within the My resources 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. Not available for *Scrapbook* items.
- **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.
- **Filter by status**—select a status from the drop-down list (*All statuses*, *Draft*, *Live*, *Rejected*, *Moderating*, *Archived*, *Suspended*, *Deleted*, *Review* or *Personal*). Check the 'Only show items in moderation' checkbox to display resources currently in the moderation workflow. (That is, resources with the status of *Moderating* or *Rejected*.) Only available for *Moderation queue* and *All resources*.

An example with *All resources* selected is shown in Figure 45.



Figure 45 My resources filters

Refer to the *EQUELLA My Resources User Guide* for more information.

My tasks

My Tasks lists any tasks that require moderation by the currently logged in user. The My tasks page is accessed by selecting the **My tasks** link from the navigation menu. An example is shown in Figure 46.

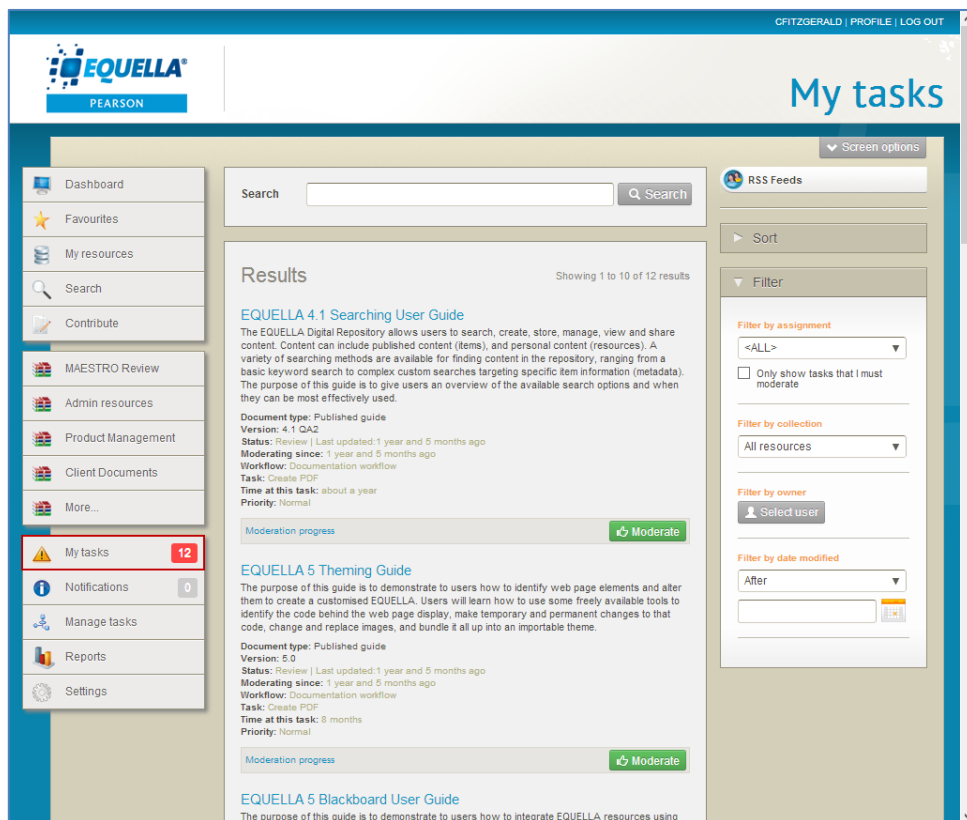


Figure 46 My tasks results page

A search text box is displayed at the top of the page to enter keyword searches, and each result displays the following:

- **Title**—the name of the resource. Select this link to go to the **Task: Edit Document** page.
- **Description**—resource description.
- **Status**—the status of the task. Task statuses will always be *moderating*.
- **Moderating since**—time since first entered moderation workflow.
- **Workflow**—name of the moderation workflow with which the resource collection is associated.
- **Task**—the resource's current workflow task.
- **Time at this task**—time since first arrived at this task.
- **Priority**—the priority of the workflow's current task.
- **Moderation progress link**—select this link to open the **Moderation progress** page to see a diagram of the current moderation workflow.
- **(x) moderation comment(s)** —this link displays if comments have been added during previous moderation tasks. Click the link to display the comments.
- **Moderate**—click to moderate the resource.

See the *EQUELLA Workflow User Guide* for more information of workflows and moderation.

Sort and filter

The **Sort** and **Filter** boxes on the My tasks results page display options relevant to tasks. An example of the **Sort** box is shown in Figure 47.

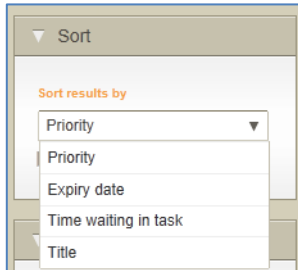


Figure 47 My tasks sort box

The sort options are:

- **Priority**—the priority of the resource’s current workflow task.
- **Expiry date**—the date set as the last day that the task can be performed.
- **Time waiting in task**—time since resource arrived at current workflow task.
- **Title**—name of the resource.

An example of the **Filter** box is shown in Figure 48.

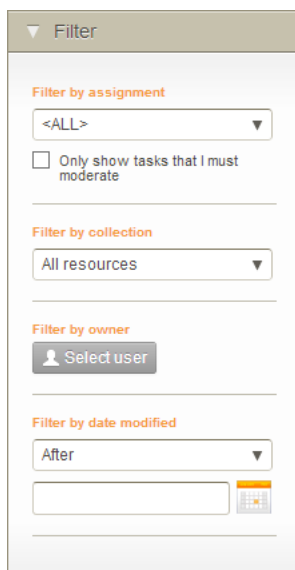



Figure 48 My tasks filter box

From the My tasks results pages, the following filter options are available:

- **Filter by assignment**—select a value from the drop-down list. Available options are *<All>*, *Assigned to me*, *Assigned to others* and *Unassigned*. See the *EQUELLA Workflow User Guide* for more information.
- **Filter by collection**—select the required collection from the drop-down list to see only resources belonging to that collection.

- **Filter by owner**—click  to display the **Select owner to filter by** dialog and search for and select the required owner. See [Filter by owner](#) on page 25 for more information.
- **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.

Notifications

The **Notifications** page displays items such as tasks that are overdue for moderation, rejected workflow items and notifications that resources have become available (*Live*). The **Notifications** page is accessed by selecting the **Notifications** link from the navigation menu. An example is shown in Figure 49.

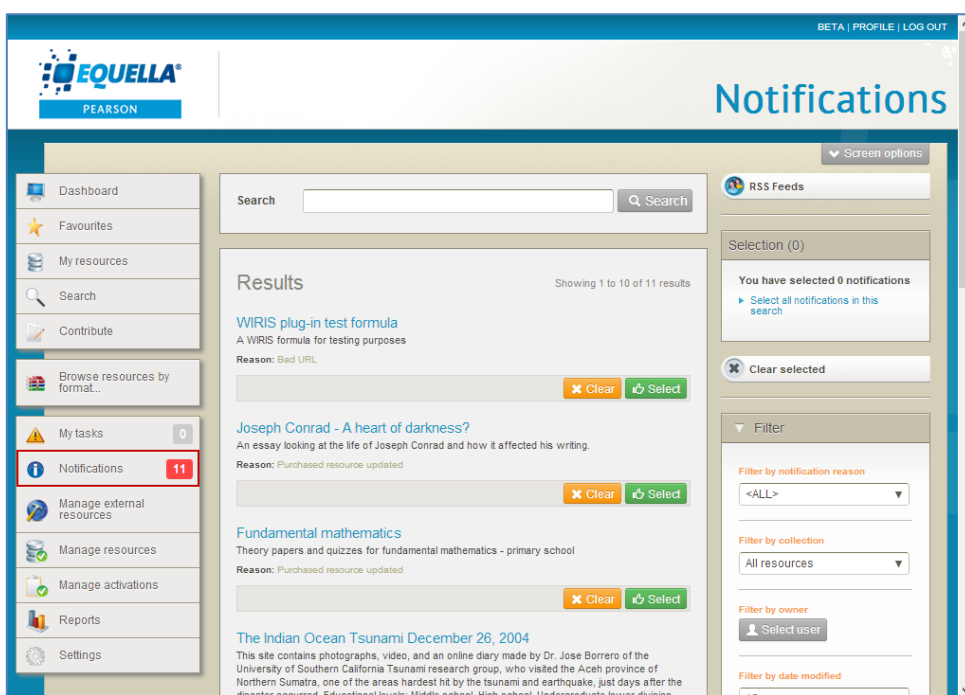


Figure 49 Notification page

A search text box is displayed at the top of the page to enter keyword searches, and each notification may display the following, depending on its type:

- **Title**—the name of the resource. Select this link to go to the **Resource summary** page.
- **Description**—resource description.
- **Status**—the status of the resource (e.g. *Rejected*, *Live*, *Moderating*).
- **Moderating since**—time since entering moderation workflow. Only displays for resources with the status of *Moderating*.
- **Reason**—why the user has received a notification. Reasons can include:
 - **Owner notified you**—notification that the resource has become available (*Live*).
 - **Rejected**—the resource has been rejected at a workflow task.

- **Moderation overdue**—a task assigned to the user has passed its due by date.
- **Bad URL** – a linked URL is incorrect and doesn't work.
- **Purchased resource updated** – resource that has been purchased using the EQUELLA Store Front function has been automatically updated from the source Store.

For full descriptions and more information, see the *EQUELLA Workflow User Guide*.


Filter

The **Filter** box on the **Notifications** results page displays options relevant to notifications.

An example of the **Filter** box is shown in Figure 50.

Figure 50 Notifications filter box

From the Notifications results pages, the following filter options are available:

- **Filter by notification reason**—select a value from the drop-down list. Available options are <ALL>, Moderation overdue, Contains bad URL, Was rejected, Notified of resource becoming LIVE and Watched resource became LIVE. See the *EQUELLA Workflow User Guide* for more information.
- **Filter by collection**—select the required collection from the drop-down list to see only resources belonging to that collection.
- **Filter by owner**—click  **Select user** to display the **Select owner to filter by dialog** and search for and select the required owner. See [Filter by owner](#) on page 25 for more information.
- **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.

Manage external resources

The Manage external resources page displays all instances of an EQUELLA resource or resource attachment that have been allocated to courses within configured LMSs. Additionally, Manage external resources also allows the user to view the uses of internal EQUELLA resources and attachments within the EQUELLA system, if *Local resources* has been configured as a connector.

The **Manage external resources** page is accessed by selecting the **Manage external resources** link from the navigation menu. An example is shown in Figure 51.

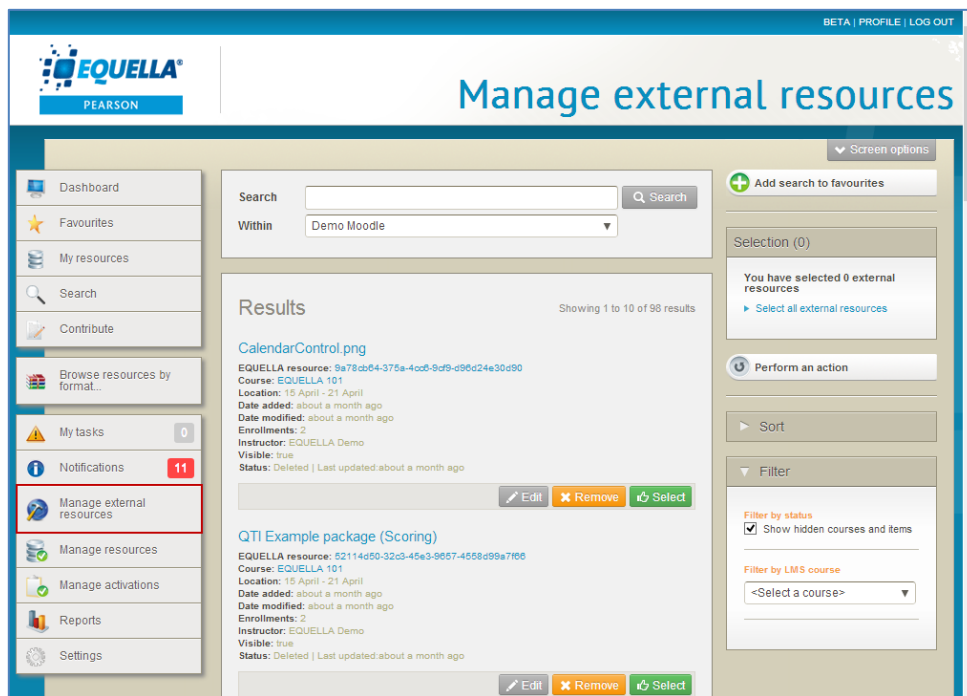


Figure 51 Manage external resources page

The **Manage external resources** page has the **Search box** at the top, where criteria are selected, and the results list displayed below.

The search box has a search text box to enter keyword searches, and a **Within** drop-down list. (*NOTE: The Within drop-down list only displays if there are multiple external connectors configured on the system.*) A value must be selected from the **Within** drop-down list before results are displayed. An example is shown in Figure 52.

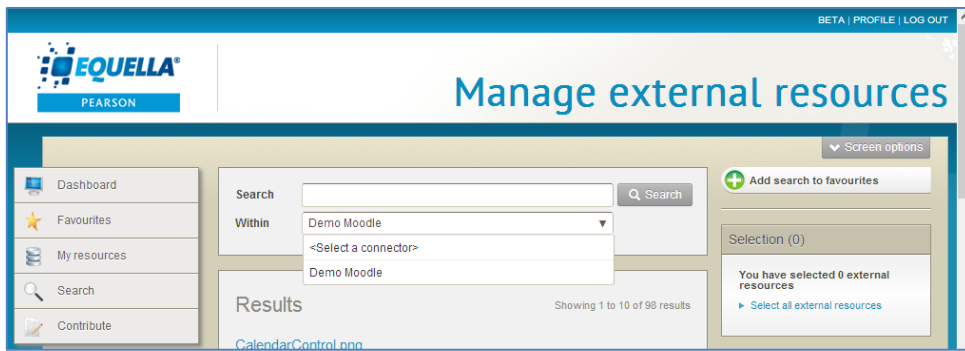


Figure 52 Manage external resources Within drop-down list

Each LMS connector can display different information about its resources. See the *EQUELLA Push to LMS Guide* for detailed information on results displayed.

Similarly, the sort and filter options within the Manage external resources results pages can be slightly different depending on the LMS connector selected. An example of the Moodle sort and filter options are shown below. See the *EQUELLA Push to LMS Guide* for full details.

Sort and filter

The **Sort** and **Filter** boxes on the Manage external resources results page (Moodle) display options relevant to Moodle resources. An example of the **Sort** box is shown in Figure 53.

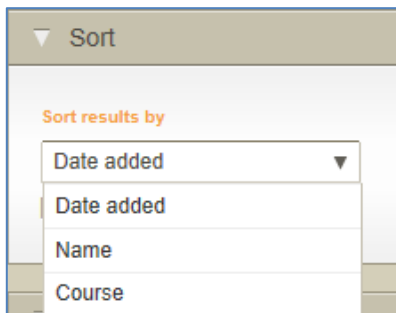


Figure 53 Manage external resources sort box

The sort options are:

- **Date added**—sorts the results by the date the resource was added to its Moodle location.
- **Name**—sorts the results by the Moodle name of the resource.
- **Course**—sorts the results by Moodle course name.
- **Reverse order of results**—select to change the order of the results.

An example of the **Filter** box is shown in Figure 54.

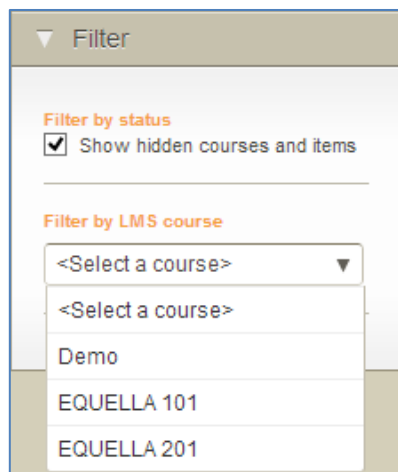


Figure 54 Manage external resources filter box—Moodle

From the Manage external resources results page (Moodle), the following filter options are available:

- **Filter by status**—select this option to include results from courses set as 'hidden' in Moodle.
- **Filter by LMS course**—select a Moodle course from the drop-down list to show only results from the selected course.

Manage tasks

The **Manage tasks** page displays all workflow tasks. Content and system administrators would typically be granted privileges to access this function to view moderation progress. The **Manage tasks** page is accessed by selecting the **Manage tasks** link from the navigation menu. An example is shown in Figure 55.

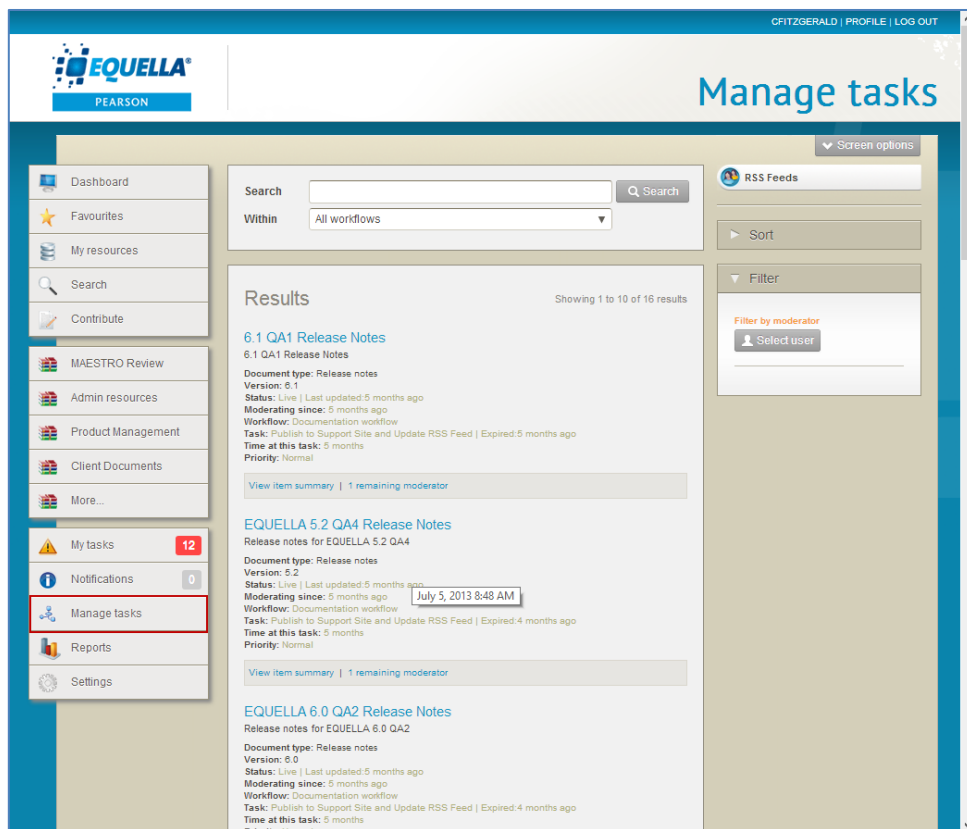


Figure 55 Manage tasks page

The **Manage tasks** page has the **Search box** at the top, where criteria are selected, and the results list displayed below.

The search box has a search text box to enter keyword searches, and a **Within** drop-down list. Searching can be refined by selecting *All workflows* or a specific workflow (e.g. *Document Review*) from the **Within** drop-down list. An example is shown in Figure 56.

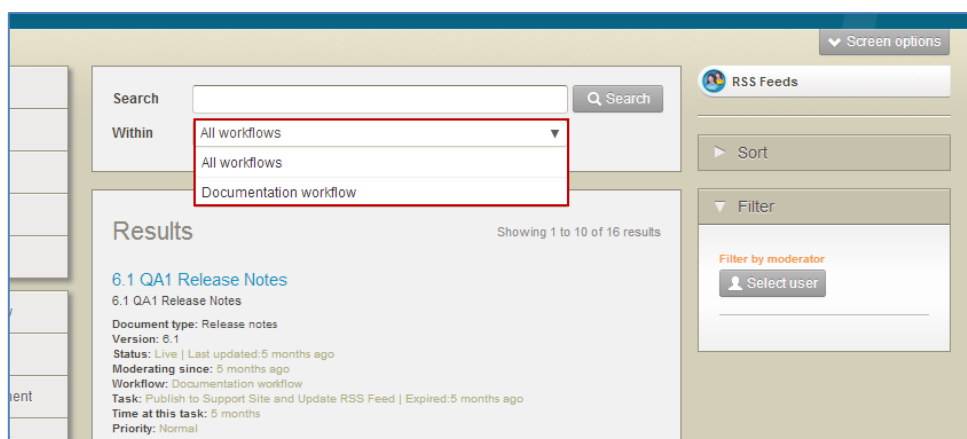


Figure 56 Manage tasks Within drop-down list

The tasks results screen lists the matching tasks, and displays the following:

- **Title**—the name of the resource. Select this link to go to the **Moderation progress** page.

- **Description**—resource description.
- **Status**—will always be *Moderating*.
- **Moderating since**—time since first entered moderation workflow.
- **Workflow**—name of the moderation workflow with which the resource collection is associated.
- **Task**—the resource's current workflow task.
- **Time at this task**—time since first arrived at this task.
- **Priority**—the priority of the workflow's current task.
- **View item summary**—select to go to the resource summary page.
- **(x) remaining moderator**—select to view the **Moderators** dialog, which lists the names of any remaining moderators.
- **(x) moderation comment**—select to view the **Moderation comments** dialog, which displays recorded moderation comments.

Sort and filter

The **Sort** and **Filter** boxes on the Manage tasks results page display options relevant to managing tasks. An example of the **Sort** box is shown in Figure 57.

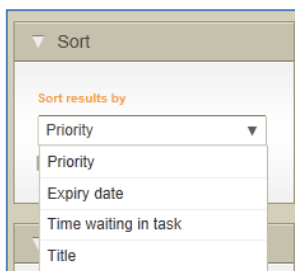


Figure 57 Manage tasks sort box

The sort options are:

- **Priority**—the priority of the resource's current workflow task.
- **Expiry date**—the date set as the last day that the task can be performed.
- **Time waiting in task**—time since the resource arrived at current workflow task.
- **Title**—name of the resource.
- **Reverse order of results**—check to reverse the order results are displayed.

An example of the **Filter** box is shown in Figure 58.

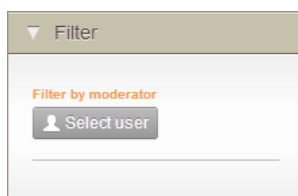
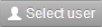


Figure 58 Manage tasks filter box

From the Manage tasks results pages, the following filter option is available:

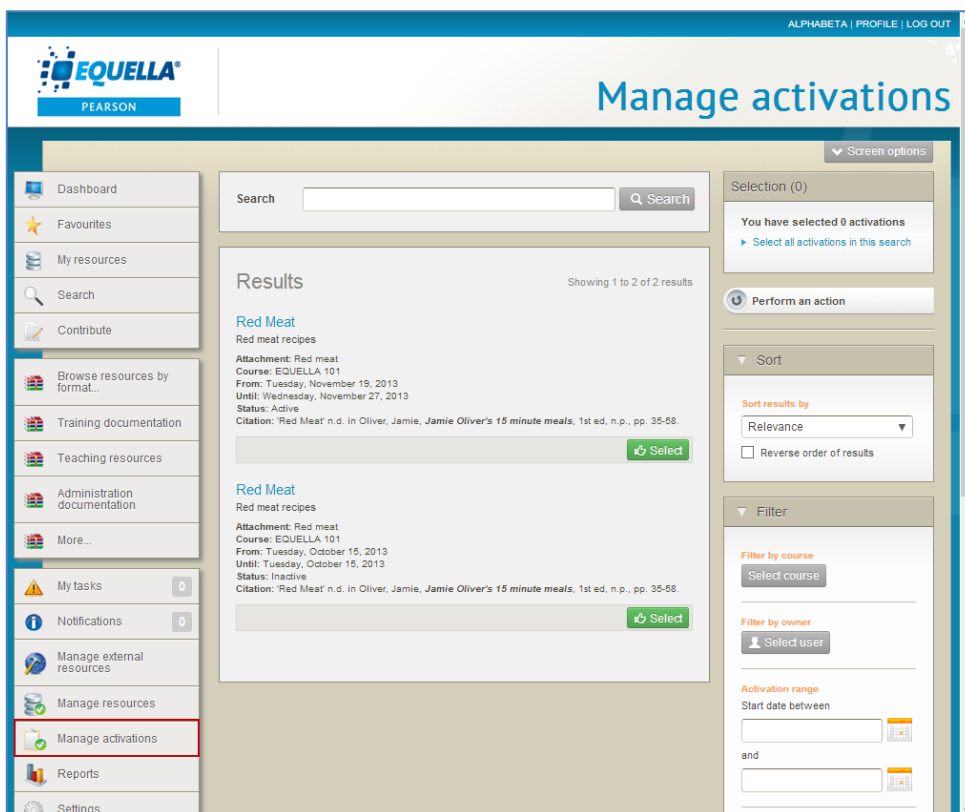
- **Filter by moderator**—click  to display the **Choose moderator to filter by** and search for and select the required user. See [Filter by owner](#) on page 25 for more information.

Manage resources

The searching, sorting and filtering options on the Manage resources page are the same as the Search results page. See [Search page](#) on page 16 and [Sorting and filtering](#) on page 23 for more information.

Manage activations

The **Manage activations** page displays copyright activations. Content and system administrators would typically be granted privileges to access this function to manage activations. The **Manage activations** page is accessed by selecting the **Manage activations** link from the navigation menu. An example is shown in Figure 59.

**Figure 59 Manage activations page**

The Manage activations results screen lists activations, and displays the following:

- **Title**—the name of the resource. Select this link to go to the **Resource summary** page.

- **Description**—resource description.
- **Attachment**—name of attachment (extract).
- **Course**—the course the resource is associated with.
- **From**—the date the resource is available from.
- **Until**—the date the resource is available to.
- **Status**—the status of the resource (e.g. *Live*, *Moderating* etc.)

See *EQUELLA Copyright Contribution Guides* (CAL and CLA) for more information.

Filter

The Manage activations filter box displays options relevant to activations.

An example of the **Filter** box is shown in Figure 60.

▼ Filter

Filter by course
Select course

Filter by owner
Select user

Activation range
Start date between
and
End date between
and
Activated between
and

Figure 60 Manage activations filter box

From the My tasks results pages, the following filter options are available:

- **Filter by course**—click **Select course** to display the **Select a course** dialog. Enter the name or part name of the course and click **Search**. An example is shown in Figure 61.

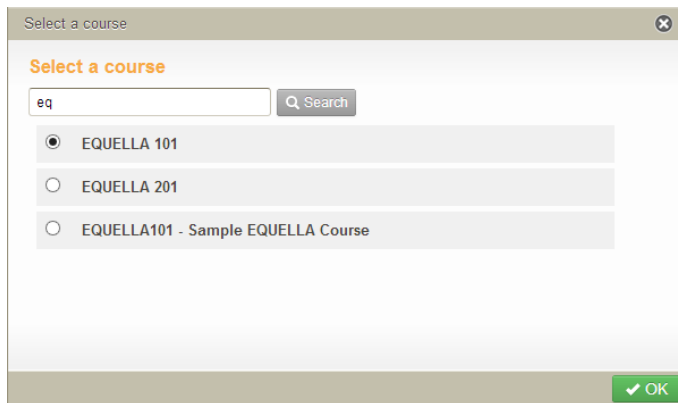


Figure 61 Select a course dialog

Select the required course from the results, then click **OK**. Click **Change course** to choose a different course, or **remove** to clear the filter.

- **Filter by owner**—click **Select user** to display the **Select owner to filter by dialog** and search for and select the required owner. See [Filter by owner](#) on page 25 for more information.
- **Activation range**—includes *Start date between x and y*, *End date between x and y* and *Activated between x and y*, where x and y are dates picked from calendar controls.

Google Books search

Google Books references can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.

To add a Google Book reference

1. Select **Google Books** from the contribution attachments control, then click **Next**. An example is shown in Figure 62.

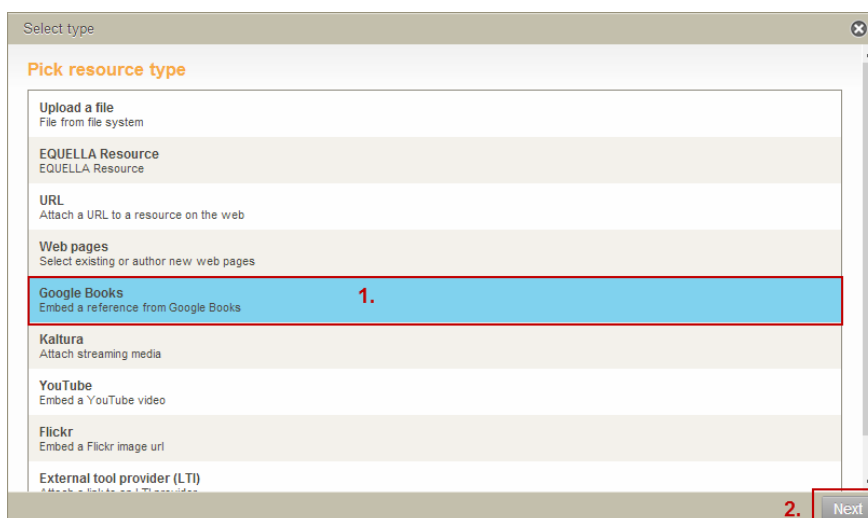


Figure 62 Contribution attachment control—Google Books

The **Add Google Book** page displays, as shown in Figure 63.

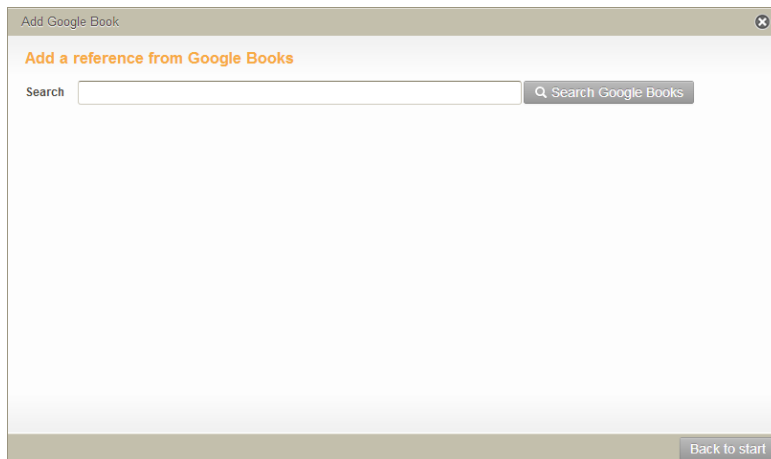


Figure 63 Add Google Book

2. Enter keywords into the search text box then click **Search Google Books**. The more keywords entered, the more relevant the search results will be. For example, *tasmania* will return all results containing the word 'tasmania', whereas *tasmania* and *history* will return results containing both words first, with the most relevant at the top of the results list. Results containing only one word match display underneath. An example is shown in Figure 64.

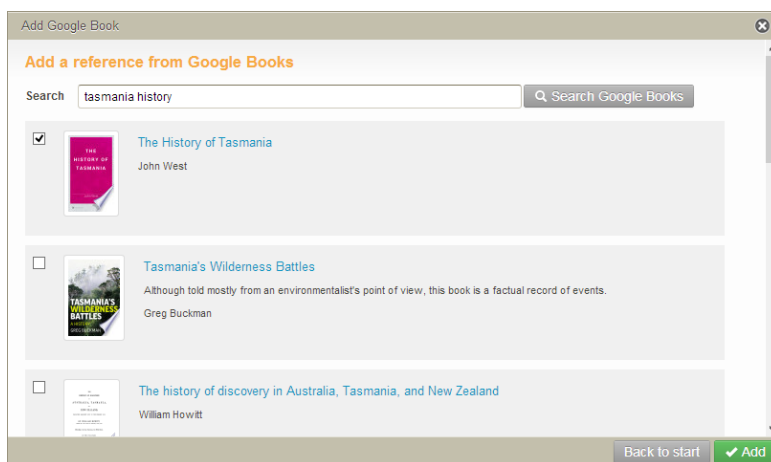


Figure 64 Add Google Book results page

3. Select the required references then click **Add**.

iTunes U search

iTunes U™ tracks can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.

To add an iTunes U track

1. Select **iTunes U** from the contribution attachments control, then click **Next**. An example is shown in Figure 65.

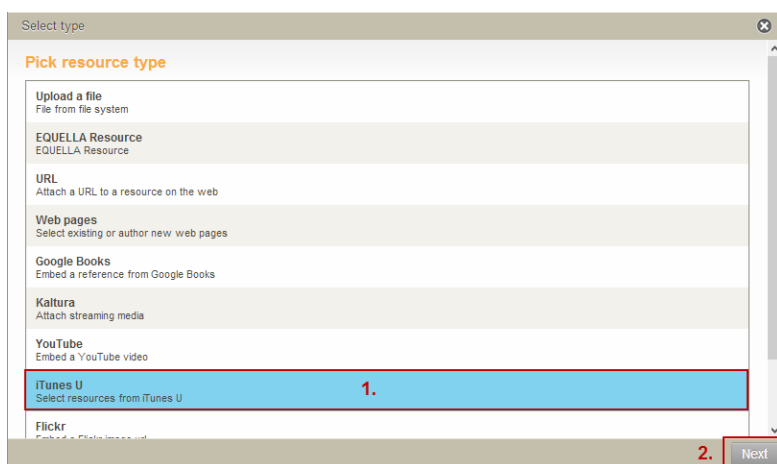


Figure 65 Contribution attachment control—iTunes U

The **Add iTunes U resource** page displays. An example is shown in Figure 66.

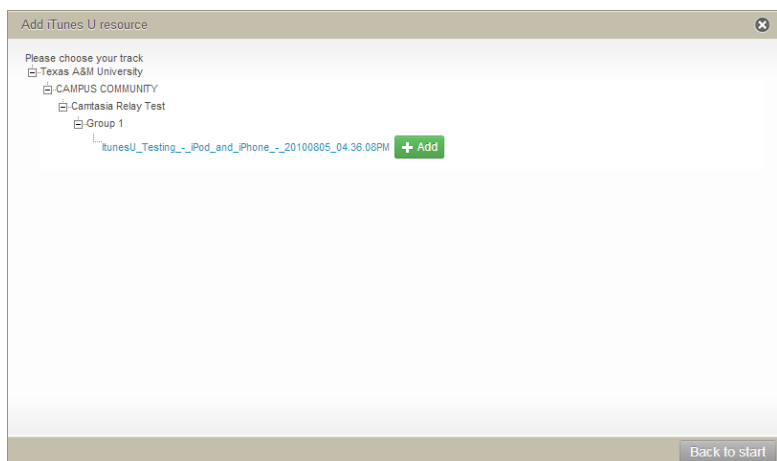




Figure 66 iTunes U resource page

2. Click + to drill down to the required track, then click .

YouTube search

YouTube video links can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.

To add an YouTube video link

1. Select **YouTube** from the contribution attachments control, then click . An example is shown in Figure 67.

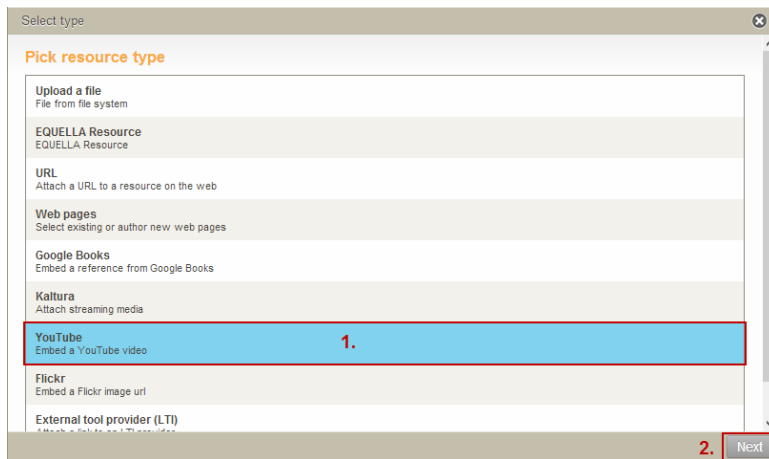


Figure 67 Contribution attachments control—YouTube

The **Add YouTube** page displays. An example is shown in Figure 68.

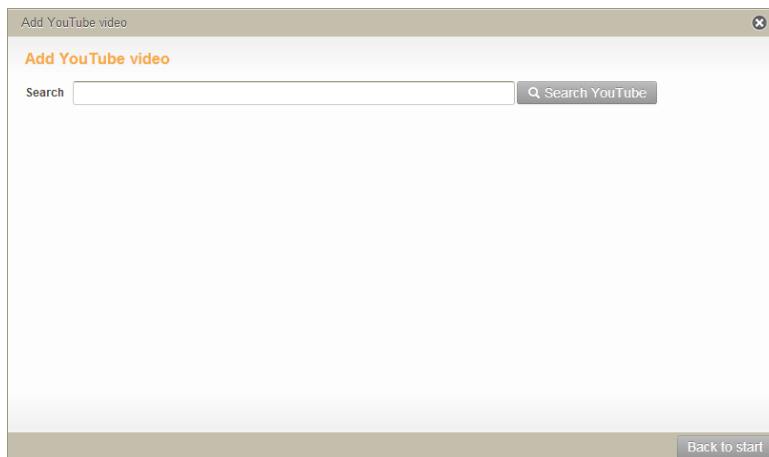
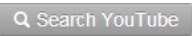


Figure 68 Add YouTube video page

2. Enter keywords into the search text box then click . The more keywords entered, the more relevant the search results will be. For example, *tasmania* will return all results containing the word 'tasmania', whereas *tasmania* and *history* will return results containing both words first, with the most relevant at the top of the results list. Results containing only one word match display underneath. An example is shown in Figure 69.

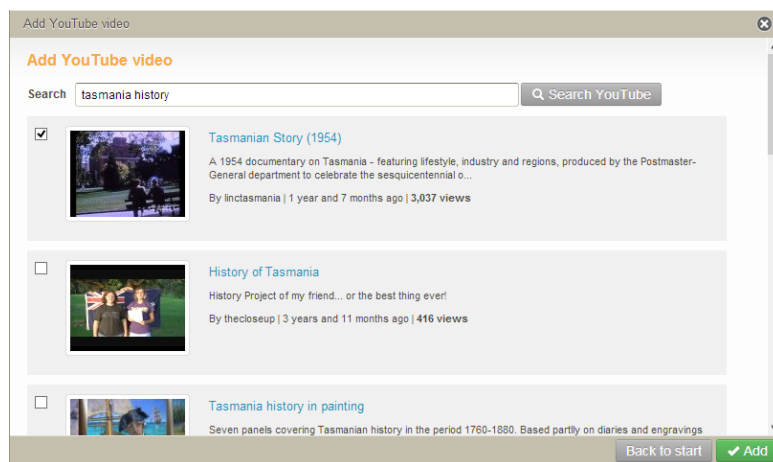



Figure 69 Add YouTube video results page

3. Select the required videos then click .

Flickr search

Flickr image links can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.

To add a Flickr image link

1. Select **Flickr** from the contribution attachments control, then click . An example is shown in Figure 70.

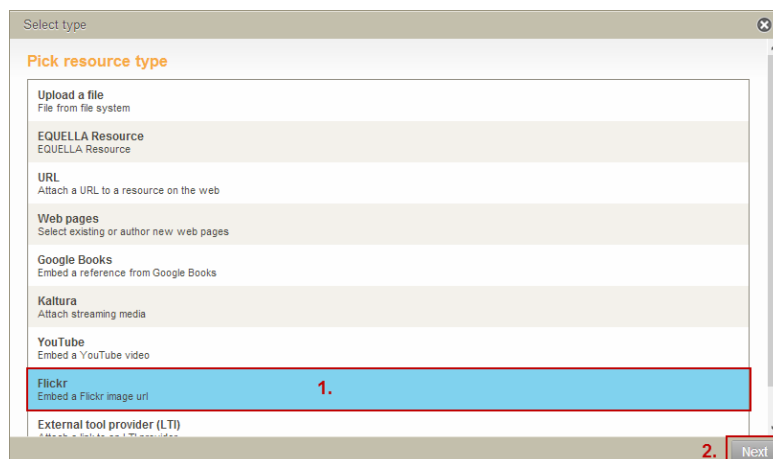


Figure 70 Contribution attachments control—Flickr

The **Add Flickr image** page displays, as shown in Figure 71.

Figure 71 Add Flickr image page

The **Add Flickr image** page has a search box with a **Search** text box for entering keywords and an **Over** drop-down list with a default value of **text and tags**. The Over values are:

- **text and tags**—perform a freetext search matching values in a photo's title, description or tags.
- **any tags**—search tags for ANY keyword match (using an OR combination).
- **all tags**—search tags for an ALL keyword match (using an AND combination).

2. Enter keywords into the search text box (e.g. *tasmania*), select a value from the Over drop-down list (e.g. *text and tags*) then click **Search**. The **Add Flickr image** results page displays. An example is shown in Figure 72.

Figure 72 Add Flickr image results page

The **Add Flickr image results page** displays Flickr image thumbnails, and in addition to *title* and *description*, may display the following:

- **Full image size**—shows the full image size dimensions
- **Date taken**
- **License**—the type of license associated with the image

3. Select the required videos then click .

Sort and filter

The **Sort** and **Filter** boxes on the Add Flickr image results page displays options relevant to Flickr images. An example of the **Sort** box is shown in Figure 73.

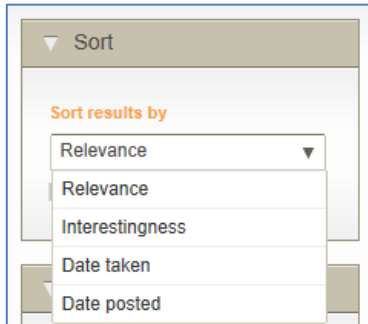


Figure 73 Add Flickr image sort box

The sort options are:

- **Relevance**—relevance to keywords entered
- **Interestingness** (a Flickr term) —a term of measurement from Flickr
- **Date taken**
- **Date posted**

An example of the **Filter** box is shown in Figure 74.

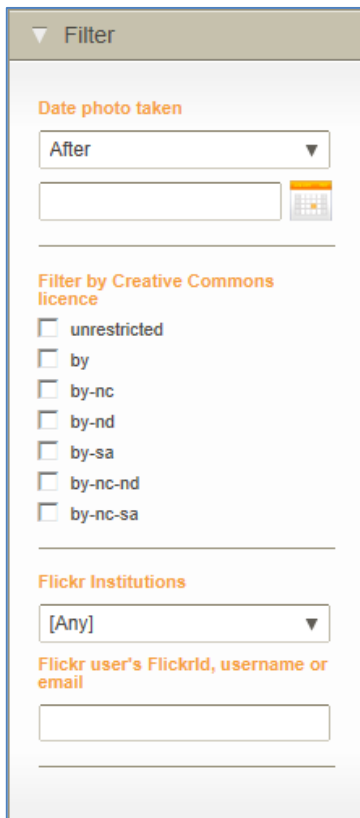


Figure 74 Flickr filter box


From the Add Flickr image results pages, the following filter options are available:

- **Date photo taken**—select a value from the drop-down list. Available options are *After*, *Before*, *Between* and *On*. Select the date or dates from the calendar controls.
- **Filter by Creative Commons licence**—select the type of licenses required.
- **Flickr Institutions**—a 'Creative Commons Institution' can be selected from the drop-down list. This list is a subset of all the Creative Commons Institutions available in Flickr. Creative Commons Institutions contain images with *unrestricted* licences, so selecting **unrestricted** in the **Filter by Creative Commons licence** field effectively returns images from all Flickr Creative Commons Institutions.
- **Flickr user's FlickrId, username or email**—enter to search for images within the user's Flickr collection.

Kaltura search

Kaltura streaming media links can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.

To add a Kaltura video link

1. Select **Kaltura** from the contribution attachments control, then click . An example is shown in Figure 75.

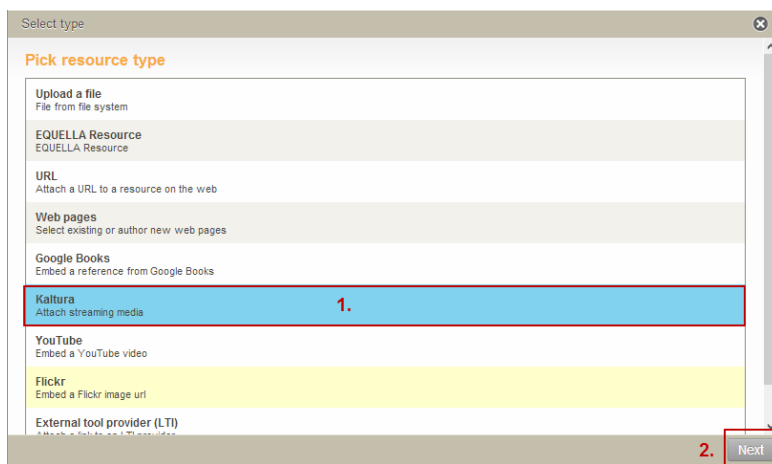


Figure 75 Contribution attachments control—Kaltura

The **Add Kaltura media** page displays, as shown in Figure 76.

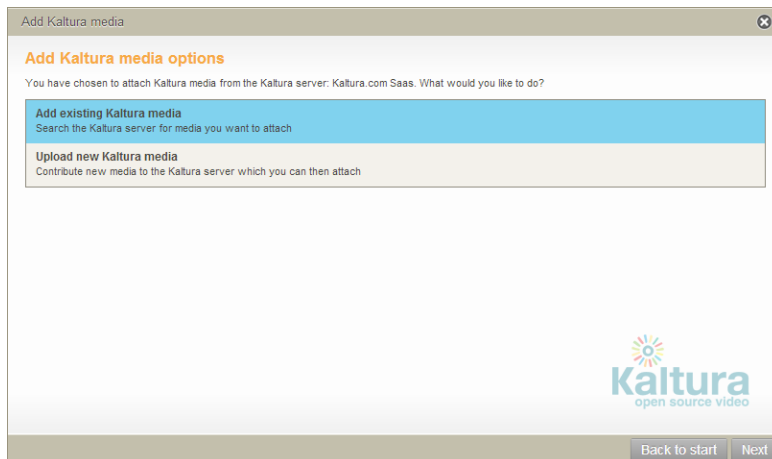


Figure 76 Add Kaltura media page

The *Add Kaltura media* page provides the user with two options, **Add existing Kaltura media** and **Upload new Kaltura media** (see the *EQUELLA Contribution User Guide* for more information on the *Upload new Kaltura media* function).

2. Select the **Add existing Kaltura media** option then click  to display the **Add Kaltura media** search page, as shown in Figure 77.

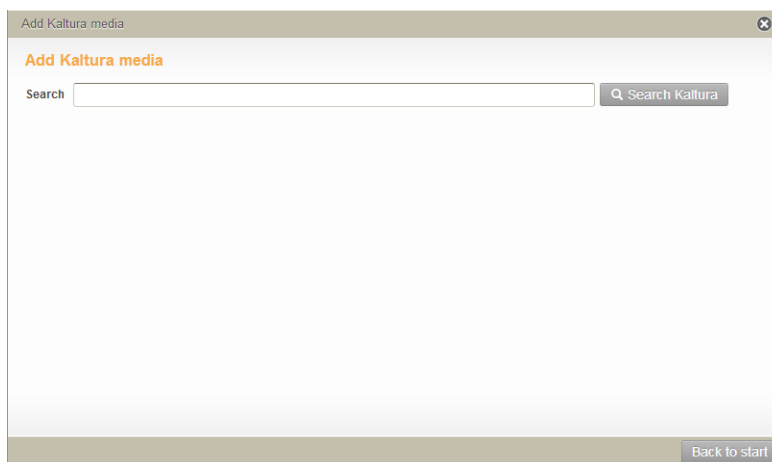



Figure 77 Add Kaltura media search page

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

3. Enter search criteria (e.g. *wildlife*) then click . The search results display. An example is shown in Figure 78.

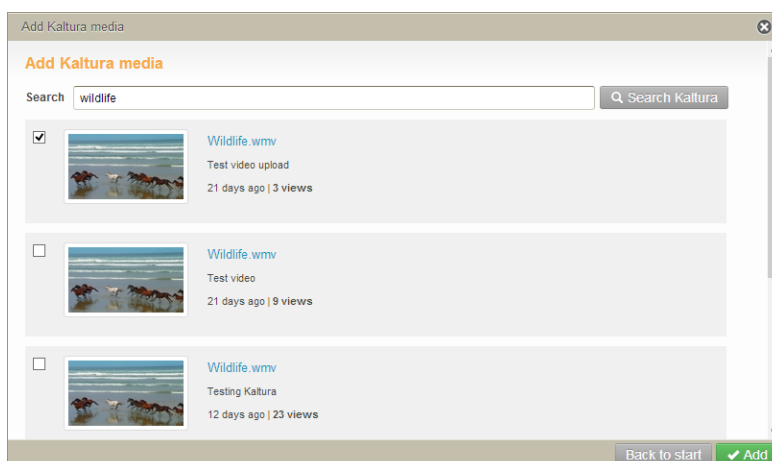


Figure 78 Add Kaltura media search results

4. Select the required resources then click .

Browsing

In addition to searching, the EQUELLA Digital Repository allows the user to browse hierarchies of logically grouped resources.

Hierarchical browsing allows users to discover resources placed within the digital repository based upon category. Users can 'drill down' into topics and their subfolders and search within the results. EQUELLA can be configured to provide a count of subtopics and results and allow contributors to add their most important resources to a hierarchy topic as key resources. See *EQUELLA Hierarchy Configuration Guide* for more information.

Hierarchy topics are accessed from the EQUELLA Dashboard page via the Browse portlet or from the hierarchy topic links displayed on the navigation menu.

Browsing using hierarchy topic links

Hierarchy topic links display in a group on the left-hand navigation menu. Select a link to display subtopics and results.

When six or more topics are added, the first four plus a **More...** link display. An example is shown in Figure 79.

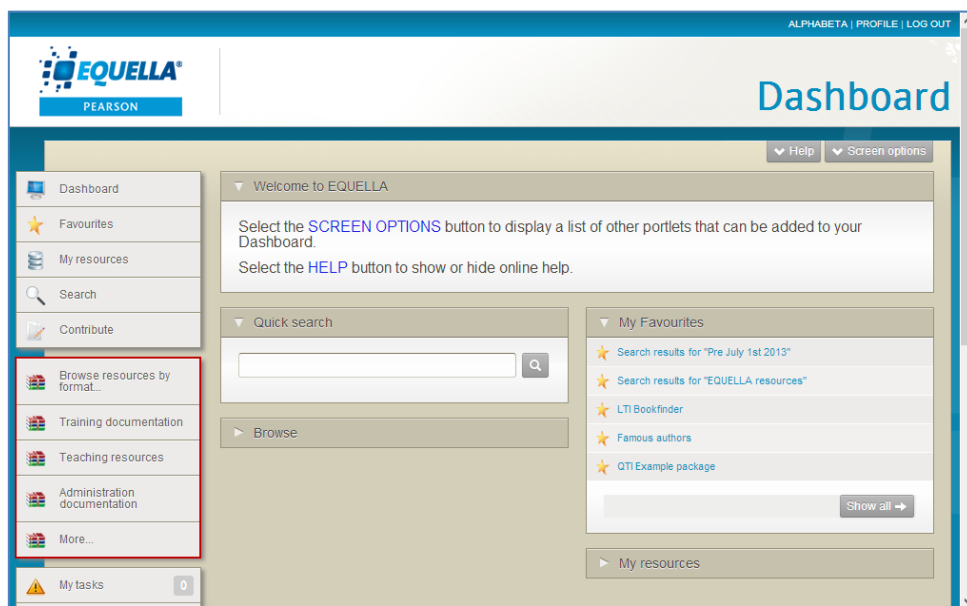


Figure 79 Hierarchy topic links

Selecting the **More...** link displays the **Browse** page with a list of all hierarchy topics, as shown in Figure 80.

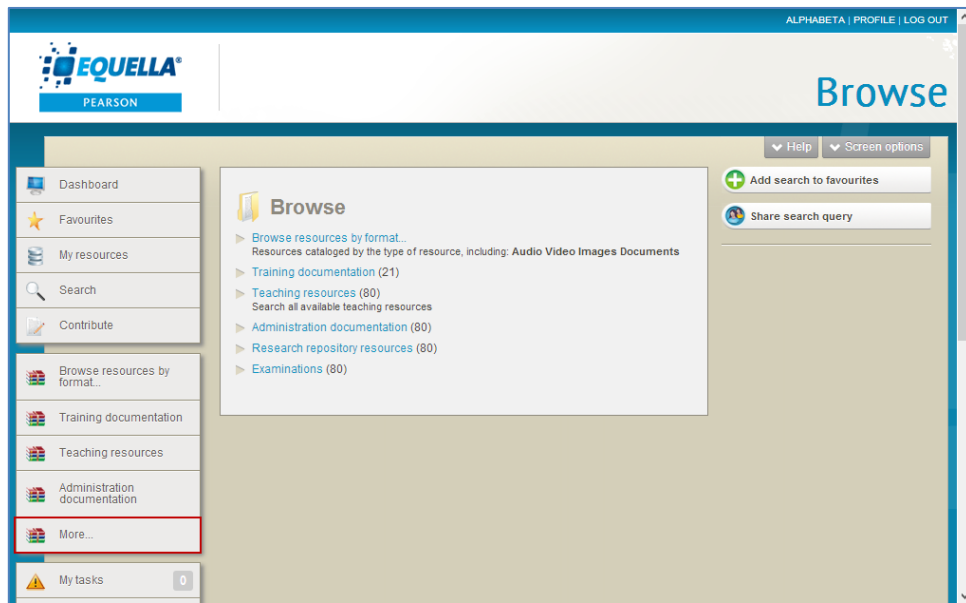


Figure 80 Browse page from More... link

Select a topic to display subtopics and results.

Browsing using the Browse portlet

The EQUELLA Dashboard page can display multiple portlets, including Browse, Favourites, Formatted text, My resources, Quick search, RSS or Atom feed, Recent contributions, Scripted, Task statistics, Tasks and Web page, depending on user privileges.

These portlets are configured by clicking **Screen options** from EQUELLA Dashboard then selecting the required portlet.

To add a Browse portlet to the Dashboard

1. Click **Screen options** from the top right-hand corner of the Dashboard page. An example is shown in Figure 81.

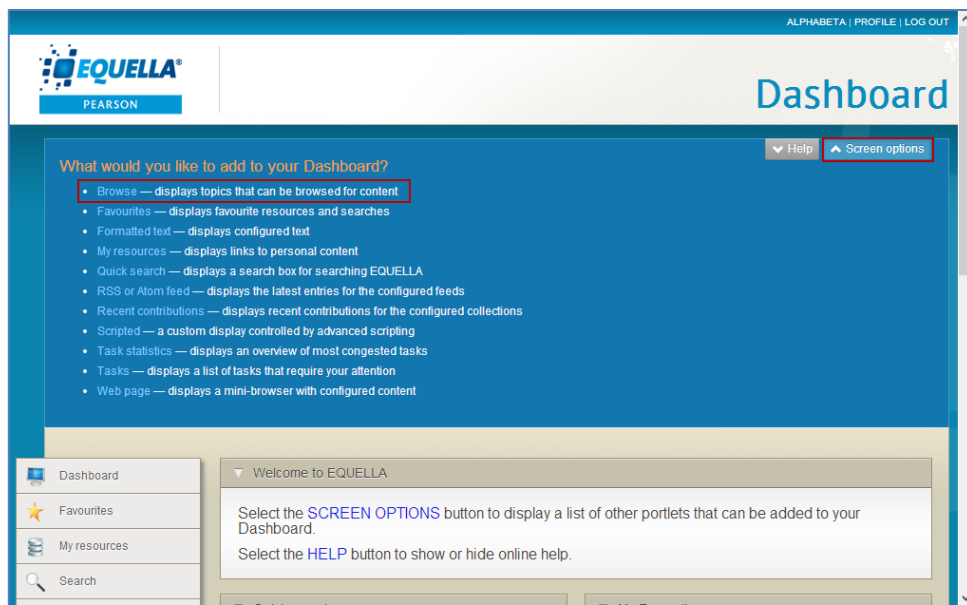


Figure 81 Accessing screen options

A list of available portlets displays. Click the **Browse** link to display the **Create a new Browse portlet** page, as shown in Figure 82.

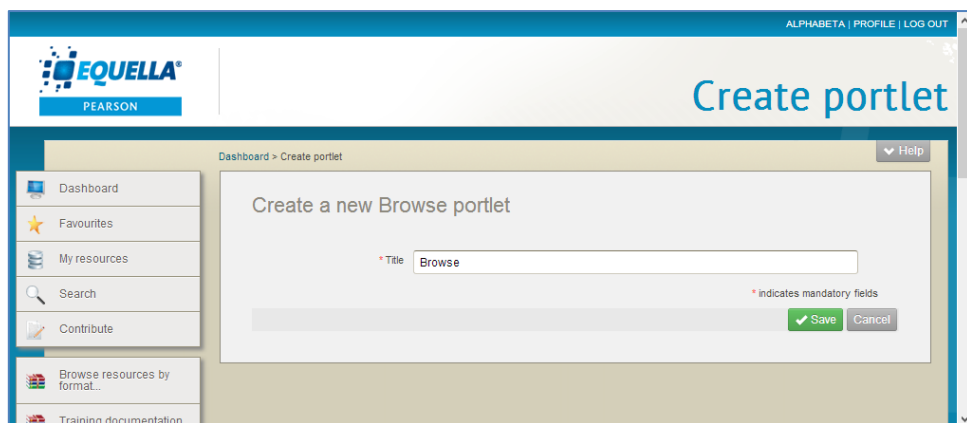


Figure 82 Create a new Browse portlet page

2. The default Title is **Browse** but may be changed, if required.
3. Click **Save**. The **Browse** portlet now displays on the Dashboard page, as shown in Figure 83.

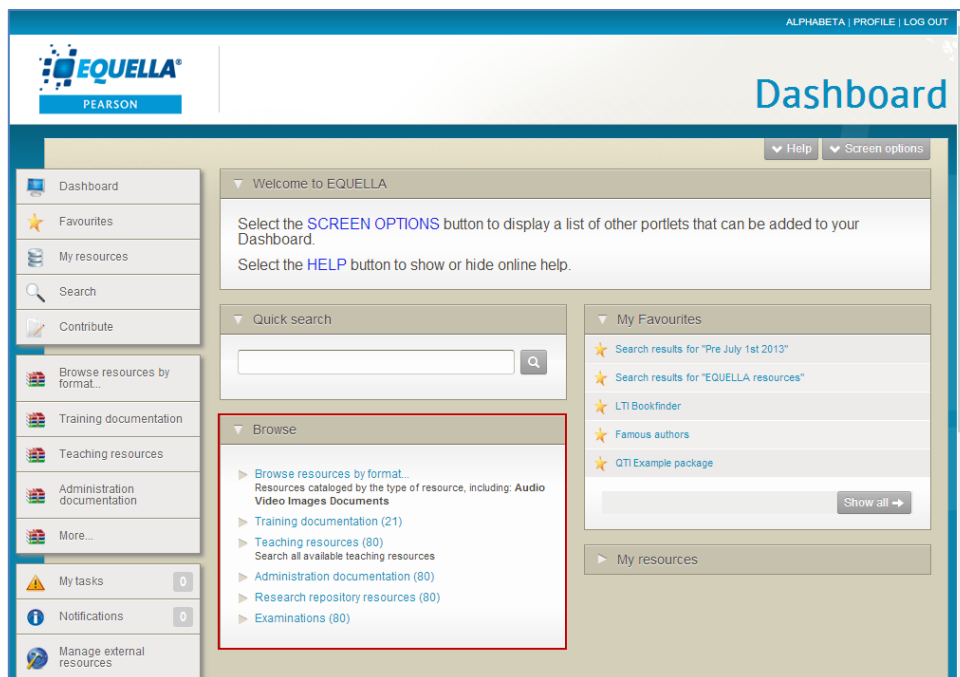


Figure 83 Dashboard with Browse portlet

Select a topic to display subtopics and results.

Displaying subtopics and results

Once a topic is selected, any subtopics are displayed. Results may also display at this point, depending on how the hierarchy has been configured. Some hierarchies may require a subtopic to be selected before any results display.

An example of a hierarchy where only subtopics display is shown in Figure 84.

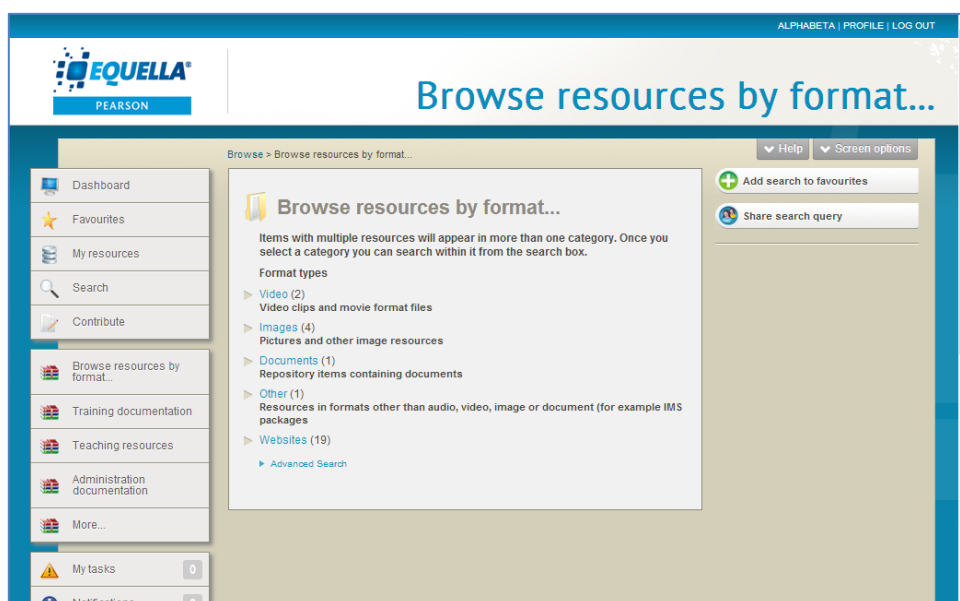


Figure 84 Hierarchy with subtopics and no results

Select a subtopic to display results.

An example of a hierarchy where both subtopics and results display is shown in Figure 85.

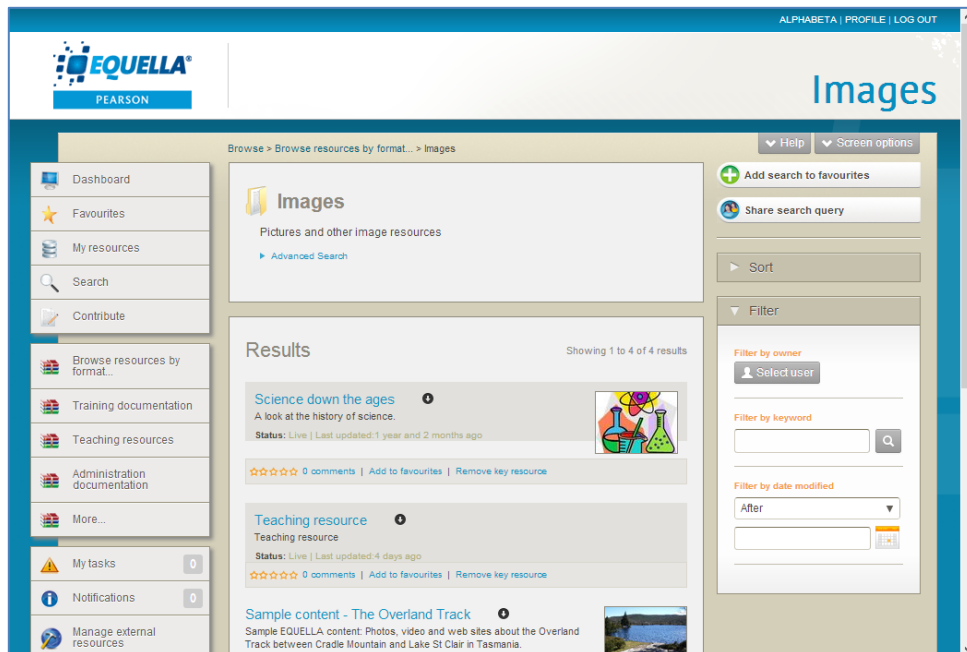


Figure 85 Hierarchy with subtopic and results

Click **Add search to favourites** to save the current search to Favourites. (See [Add search to favourites](#) on page 22 for more information.)

Click **Share search query** to open the **Share search query page** and select the share method. (See [Share search query](#) on page 23 for more information.)

The **Sort** and **Filter** panels can be used to further 'drill down'.

Viewing key resources

Key resources are important resources added to a hierarchy, and are always highlighted and displayed at the top of hierarchy results. An example is shown in Figure 86.

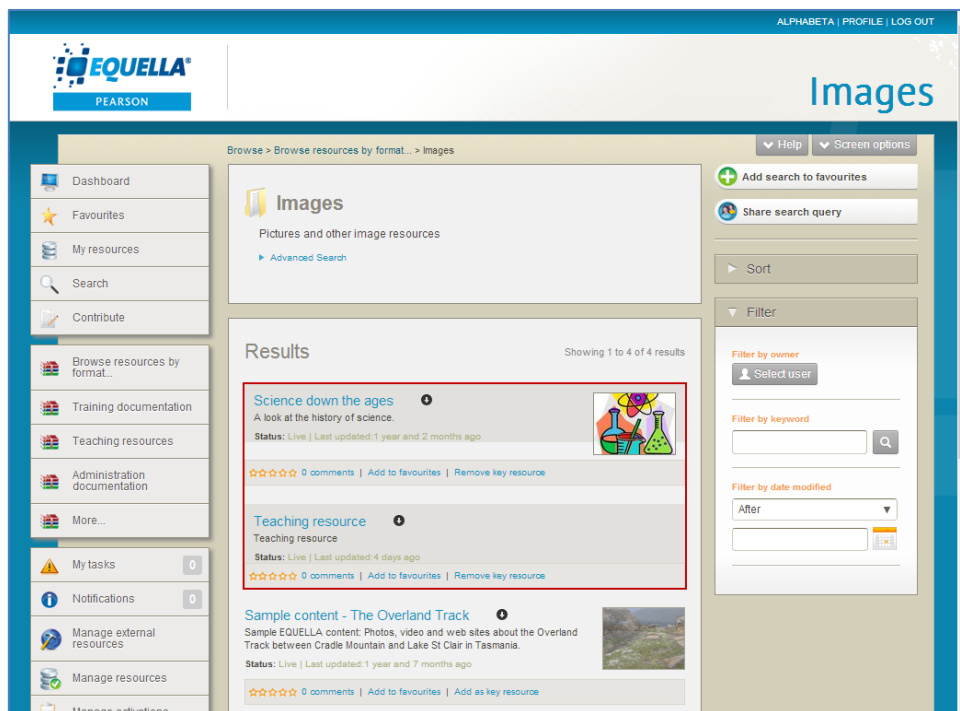


Figure 86 Viewing key resources

See the *EQUELLA Hierarchy Configuration Guide* for more information about key resources and hierarchies.

Search settings

The **Searching and content indexing page** is where default searching options are set, additional search filters can be added or edited, searching boosting is configured and content indexing options are set.

A user with administrator privileges would generally have access to these settings.

To access Searching and content indexing settings

Select **Settings** from the navigation menu. The **Settings** page displays.

1. Select the **Searching and content indexing** link to display the **Searching and content indexing** page, as shown in Figure 87.

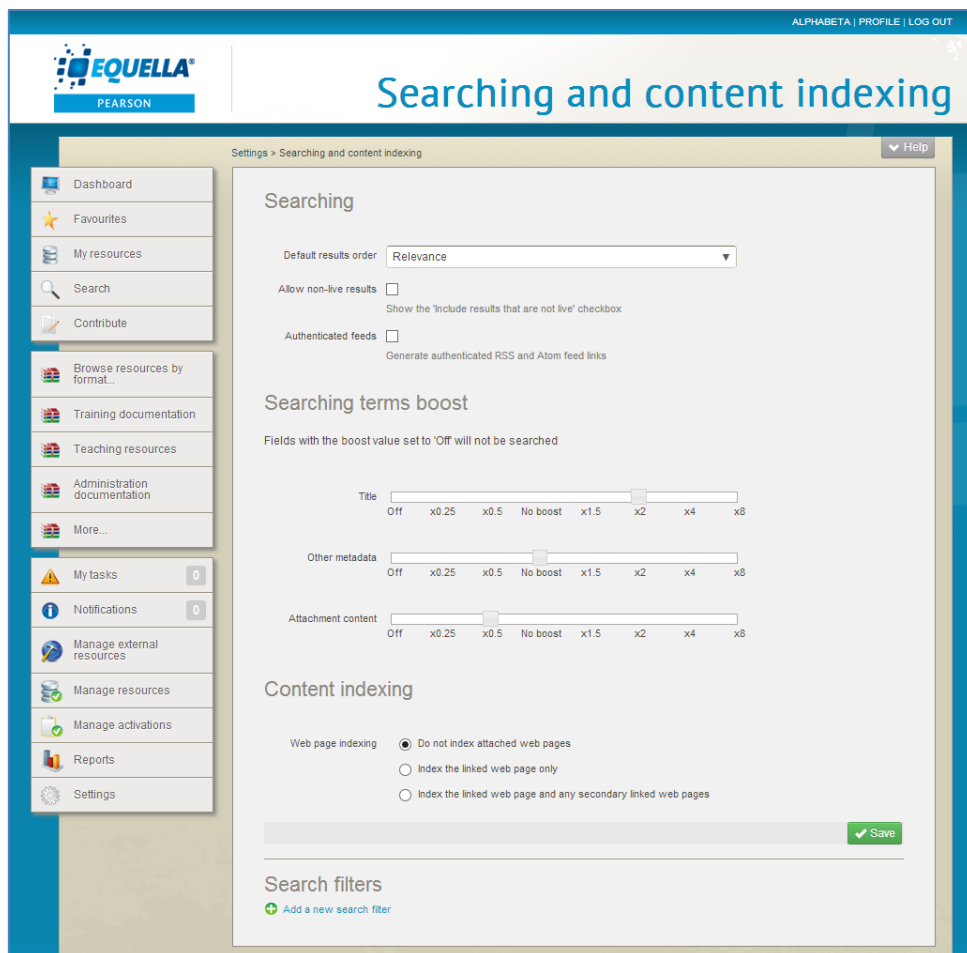


Figure 87 Searching and content indexing page

Searching options

To configure Searching options

1. From the **Default results order** drop-down list, select the required default order resources will display on search results pages (*Relevance, Date last modified, Title or User rating*).
2. Select the **Allow non-live results** checkbox to show the 'Include results that are not live' checkbox in the Search page *Screen options*. An example is shown in Figure 88.

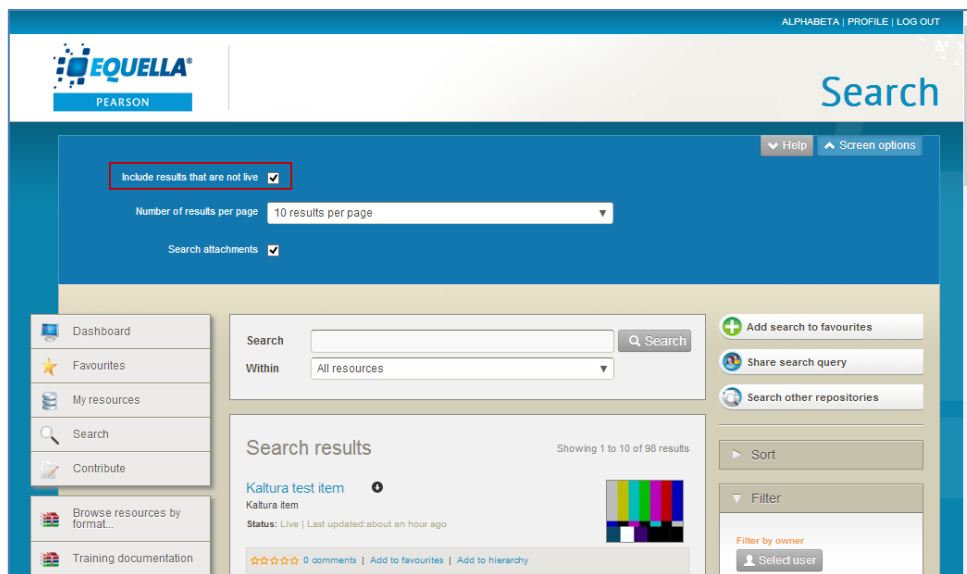



Figure 88 Search page screen options

3. Check the **Authenticated feeds** checkbox to default to authenticated RSS or Atom feeds. If this box is not checked, users can only see public items in their feed, rather than all the results generated.
4. Click .

Searching terms boost

When the results sort order is set to *Relevance*, and search terms are entered, the results display a relevance score. (See [Relevance scores and searching attachments](#) on page 13 for further information.)

When calculating the relevance score in EQUELLA versions prior to 6.2, the item title was worth 1.5 times as much as content found anywhere else (metadata plus attachments). Attachment content and metadata were grouped into the same field and were worth the same.

From EQUELLA 6.2, these weights are adjustable, and in addition the attachment content is a separately configurable weight. That is, title, metadata and attachment content can all be adjusted from being not searched at all to being 8 times more relevant.

NOTE: Different indexed metadata nodes cannot be made more or less relevant; they are all worth the same.

To configure Searching terms boost

1. Drag the boost variables to the required values. An example is shown in Figure 89.

Searching terms boost

Fields with the boost value set to 'Off' will not be searched

Title: Off x0.25 x0.5 No boost x1.5 x2 x4 x8

Other metadata: Off x0.25 x0.5 No boost x1.5 x2 x4 x8

Attachment content: Off x0.25 x0.5 No boost x1.5 x2 x4 x8


Figure 89 Searching terms boost

*NOTE: Setting a boost value to **Off** will prevent the system from searching in that field. (e.g. If Attachment content is set to Off, the system will not look at attachment content for matches to the search criteria.)*

2. Click .

Content indexing options

To configure Content indexing options

1. Select the required option from:
 - **Do not index attached web pages**—select this option if it is not required for searches to return matching results on linked web pages.
 - **Index the linked web page only**—select this option to index the web page of the linked URL, but no further linked web page levels. This means that searches will return matching results from the web page content.
 - **Index the linked web page and any secondary linked web pages**—select this option to index the page of the linked URL and the next level of web pages (limit 0.5 Mb). This means that searches will return matching results from each level of web pages.
2. Click .

Search filters

Adding one or more search filters adds those filters to the filter box on resource results screens. This allows the user more filtering options for their search results, enabling easier discovery of resources.

Search filters are based on MIME types. For example, a filter might be required to show only resources that have image attachments. An example is shown in Figure 90.

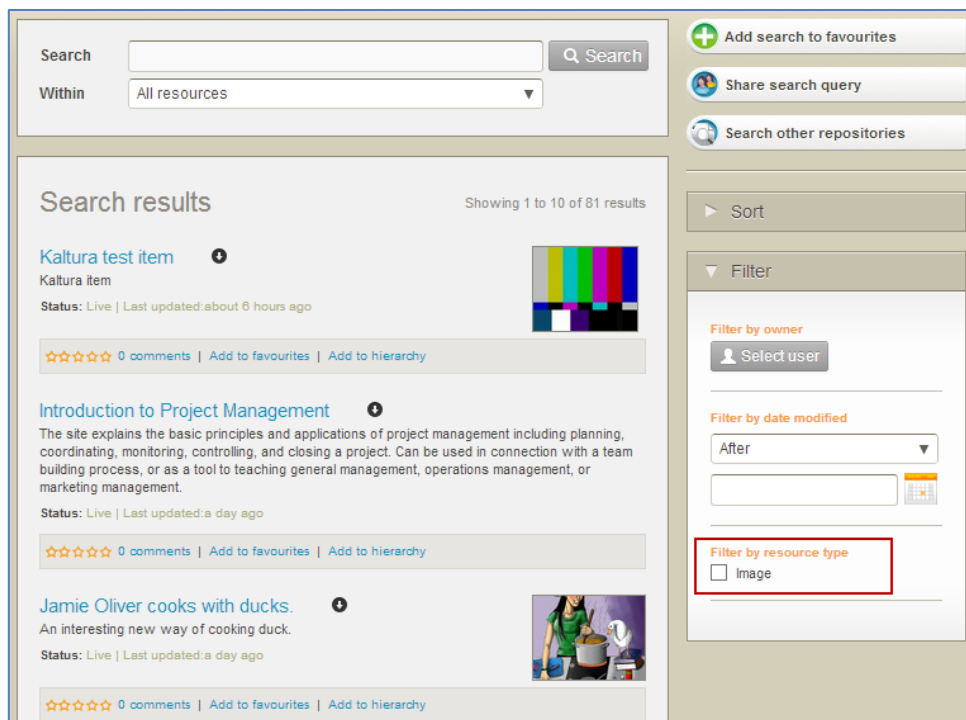


Figure 90 Filter box with added search filter

To add a Search filter

1. Click the **Add a new search filter** link. An example is shown in Figure 91.

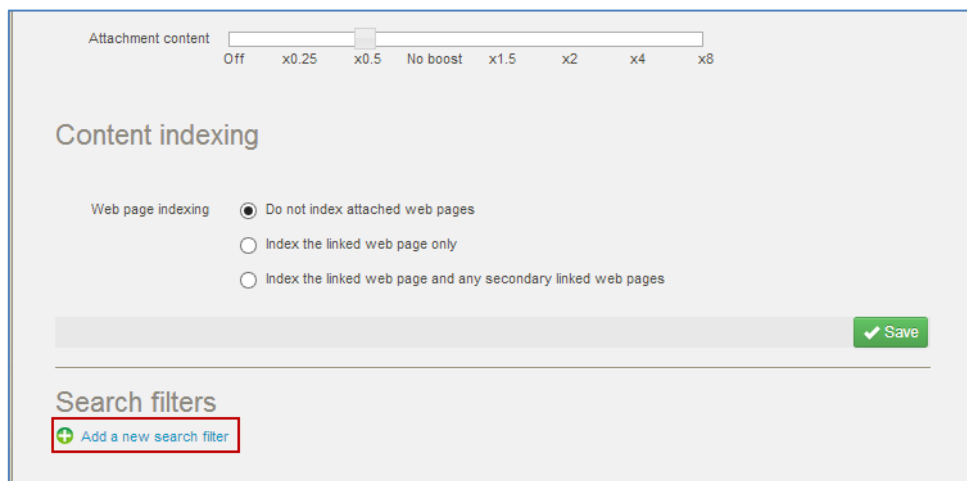


Figure 91 Add a new search filter link

The **Create new search filter** page displays. An example is shown in Figure 92.

Figure 92 Create new search filter

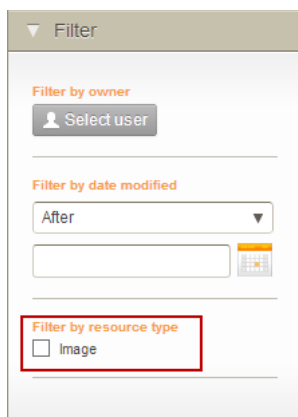
2. Enter a name for the filter in the **Name** field (e.g. *Image*).
3. Select the MIME Types required (e.g. Image (image/gif, image/bmp etc.)).
4. Click . The Search setting page displays with the new filter listed. An example is shown in Figure 93.

Figure 93 Search settings with Search filter added

More search filters can be added by selecting the **Add a new search filter** link.

The search filter can be edited or removed by clicking the relevant link.

The search filter displays at the bottom of the filter box on resource results screens under the heading of **Filter by resource type**. An example is shown in Figure 94.



▼ Filter

Filter by owner

Select user

Filter by date modified

After

Filter by resource type

☐ Image

Figure 94 Filter box with added search filter

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>.