EQUELLA[®]

Searching User Guide

Version 6.2

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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').
- Log in to EQUELLA. The EQUELLA Dashboard displays. An example is shown in Figure 1.

→ C 🗋 alphabeta.eque	lla.com/nav13/access/home.do	٤
		ALPHABETA PROFILE LOG OU
PEARSON		Dashboard
		✓ Help ✓ Screen options
Dashboard	▼ Welcome to EQUELLA	
Favourites	Select the SCREEN OPTIONS button to display a	list of other portlets that can be added to your
My resources	Dashboard. Select the HELP button to show or hide online held	
Search		
/ Contribute	▼ Browse	 My Favourites
	 Browse resources by format Resources cataloged by the type of resource, including: Audio Video Images Documentation (20) Training documentation (20) Search all available teaching resources Administration documentation (77) Research repository resources (77) Examinations (77) Quick search 	 ✓ Famous authors ✓ OTI Example package ✓ EQUELLA 6.2 Bets Phase I Show all → ✓ My resources ✓ Published (4) ⑥ Drafts (0) ⑧ Scrapbock (0) ⑧ In moderation (0) ⑧ Under review (0) ⑧ In genetation (0) ⑧ Under review (0) ⑧ Rejected (0)
· · · · · ·		Rejected (0)
Manage activations		
Settings		

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 <u>Search page</u> on page 16 for more information.
- **Search by collection**—search within a specific collection. See <u>Search by collection</u> on page 18 for more information.
- **Advanced search**—target specific resource information (metadata) using customised search criteria. See <u>Advanced search</u> 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 <u>Search Remote repositories</u> on page 27 for more information.
- **Favourites**—search within a group of resources or searches that have been bookmarked as favourites. See <u>Favourites</u> on page 33 for more information.
- **Google Books™ search**—search for Google Books content to add to contributed resources. See <u>Google Books search</u> on page 50 for more information.

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

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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.

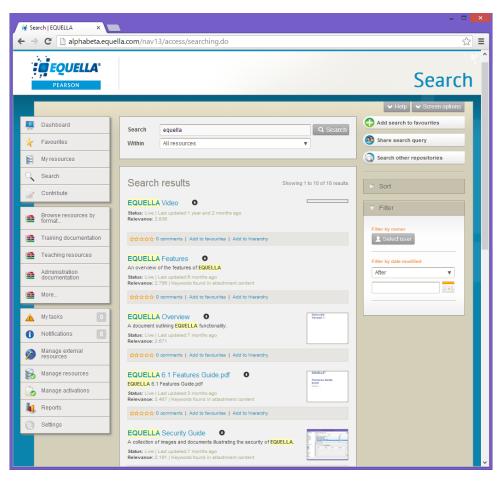


Figure 3 Single keyword search results

(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.

Search	equella 6.1 beta phase i	Q Search
Within	equella 6.1 beta phase i	
	equella 6.1 features guide.pdf	
L	equella collection definition guide	
	equella html editor plugin guide.pdf	
Search	results	Showing 1 to 2 of 2 results

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

Search Within	equella 6.2 beta phase i equella 6.2 beta phase i	Q Search
Searc	h results	Showing 1 to 2 of 2 results

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 \rightarrow to select this suggestion.

Click Click Click Click Click Click Click

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.

Search Within	equella features equella features	Q Search
Searc	h results	Showing 1 to 8 of 8 results

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.

Search Within	equella guide All reso guide	Q Search
Searcl	n results	Showing 1 to 8 of 8 results

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.

🥳 Search EQUELLA 🛛 🗙		- • ×
← → C 🗋 alphabeta.eque	la.com/nav13/access/searching.do	☆ =
PEARSON		Search
Dashboard	Search cook Q Searc	
★ Favourites	Within All resources	Share search query
🗑 My resources		Search other repositories
C Search	Search results Showing 1 to 2 of 2 resu	its Sort
Contribute	Cooking with gas	Filter
Browse resources by format	Status: Live Last updated.5 months ago Relevance: 4,155	Filter by owner
Training documentation	Citation: 'Cooking with gas' n.d. in Oliver, Jamie, Jamie Oliver's 15 minute meals, 1st ed, n.p., pp. 101-154.	L Select user
Teaching resources	☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy	Filter by date modified
Administration documentation	Jamie Oliver cooks with ducks. An interesting new way of cooking duck.	After v
🐲 More	Status: Live Last updated:less than a minute ago Relevance: 3.823	
🛕 Mytasks 🛛 🔘	☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy	
Notifications		
👧 Manage external		

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.

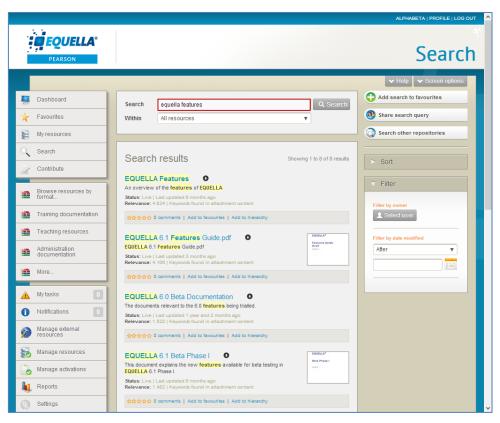


Figure 9 Multiple word search results

(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.

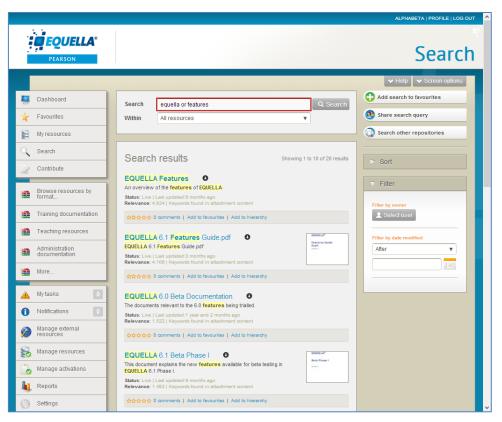


Figure 10 Multiple keywords with +

(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 <u>tasmania</u>. Any other resources containing words starting with the character string 'tas' will also be returned (e.g. **tas**te, **tas**sel 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.

Search	equella	Q Search
Within	All resources	v
Search	results	Showing 1 to 10 of 19 results
EQUELL/	Video O	
Status: Live Relevance: 2	Last updated:1 year and 2 months ago .806	
	Comments Add to favourites Add to hierarchy	
	of the features of EQUELLA	
	Last updated:9 months ago .768 Keywords found in attachment content	
****	comments Add to favourites Add to hierarchy	
	Overview O	Overview Version 1
	outlining EQUELLA functionality.	
Relevance: 2	Last updated:7 months ago .644	
***	comments Add to favourites Add to hierarchy	
FOUELL	6.1 Features Guide odf	EQUELLA

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.

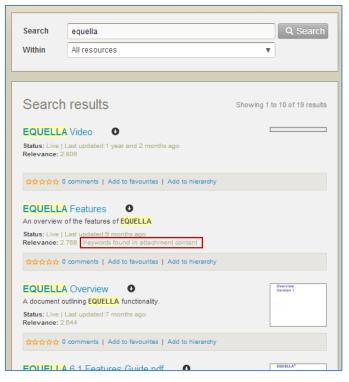


Figure 12 Keywords found in attachment content message

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.

		ALPHABETA PROFILE LOG OUT
EQUELLA °		
PEARSON		Search
		V Help Screen options
Include results that	tare not live	
Number of resu	its per page 10 results per page	v.
Search	attachments 🗸	
Tashboard	Search equella	Q. Search
★ Favourites	Within All resources	Share search query
My resources		Search other repositories
C Search		
Contribute	Search results	Showing 1 to 10 of 19 results > Sort
M Contribute	EQUELLA Video	Filter
Browse resources by	Status: Live Last updated:1 year and 2 mor Relevance: 2 806	ths ago

Figure 13 Search attachments toggle option

See <u>Searching terms boost</u> 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.

		ALPHABETA PROFILE LOG OUT
PEARSON		Dashboard
		✓ Help ✓ Screen options
🦉 Dashboard	▼ Welcome to EQUELLA	
★ Favourites	Select the SCREEN OPTIONS button to display a Dashboard	list of other portlets that can be added to your
😫 My resources	Select the HELP button to show or hide online help	
C Search		
Contribute		V My Favourites
Browse resources by format	equella	★ Famous authors ★ QTI Example package
Training documentation	▼ Browse	★ EQUELLA 6.2 Beta Phase I
Teaching resources		Show all →
Administration documentation	Browse resources by format Resources cataloged by the type of resource, including: Audio Video Images Documents Training documentation (21) Teaching resources (79)	My resources
documentation	► Training documentation (21)	

Figure 14 Quick search portlet

To perform a search using the Quick search portlet

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

PEARSON		ALPHABETA PROFILE LOG OUT
Q Dashboard	Search equella Q Search	Help Screen options Add search to favourites
★ Favourites	Within All resources	() Share search query
My resources		Search other repositories
Search	Search results Showing 1 to 10 of 19 results	► Sort
Contribute	EQUELLA Video	
Browse resources by format	Status: Live Last updated:1 year and 2 months ago Relevance: 2.806	Filter
Training documentation	ድርጉ የመጠቀም የ Add to favourites Add to hierarchy	Filter by owner
Teaching resources	EQUELLA Features	Filter by date modified
Administration documentation	An overview of the features of EQUELLA Status: Live [Last updated: 8 months ago Relevance: 2.708 Keywork found in attachment content	After v
More	☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy	
🔥 Mytasks 🛛 🚺	EQUELLA Overview A document outlining EQUELLA functionality.	
Notifications	Status: Live Last updated:7 months ago Relevance: 2.844	
Manage external resources	☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy	
🛃 Manage resources	EQUELLA 6.1 Features Guide.pdf	

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.

5. 1 0		ALPHABETA PROFILE LOG OUT
PEARSON		Search
Dashboard		Help Screen options Add search to favourites
Favourites	Search Q. Search Within All resources	Share search query
My resources		Search other repositories
C Search	Search results Showing 1 to 10 of 79 results	► Sort
Contribute	Jamie Oliver cooks with ducks.	↓ Filter
Browse resources by format	An interesting new way of cooking duck. Status: Live Last updated less than a minute ago	Filter by owner
Training documentation	☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy	L Select user
Teaching resources	LTI Bookfinder O Locate copies of books	Filter by date modified
Administration documentation	Status: Live Last updated about a minute ago	After
More	☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy	
My tasks	Famous authors O A collection of information about some of the most famous authors of our day.	
Notifications Manage external	Status: Live Last updated 2 minutes ago	
Manage resources	Taxonomies O Tournal tout	
Manage activations	Taxonomies guide Taxonomies guide Autor ago	

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.

N 16		ALPHABETA PROFILE LOG OUT
PEARSON		Search
Dashboard		Help Screen options Add search to favourites
★ Favourites	Search Q Search Within All resources V	Share search query
Search	Search results Showing 1 to 10 of 79 results	Search other repositories
Contribute	Jamie Oliver cooks with ducks.	► Sort
Browse resources by format	An interesting new way of cooking duck. Status: Live Last updated less than a minute ago	Filter by owner
Training documentation Teaching resources	C C C C C C C C C C C C C C C C C C C	Select user
Administration documentation	Locate copies of books Status: Live Last updated about a minute ago	After
More	호유수수수 0 comments Add to favourites Add to hierarchy Famous authors •	
Notifications	A collection of information about some of the most famous authors of our day. Status: Live Last updated 2 minutes ago	
Manage external resources	**** 2 comments Remove from favourites Add to hierarchy	
Manage resources	Taxonomies O Tostus" Taxonomies guide Status: Live Last updated about 21 hours ago	

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.

Collections Advanced searches Remote repositories All resources Learning resources advanced search Books - Libraries Australia Books eReserve Journals - Libraries Australia eReserve articles MERLOT Journals Learning resources		Search Within	All resources	Q Search
LTICollection	All Boo eRe Jou Lea	resources oks eserve articles irnals	Learning resources advanced search	Books - Libraries Australia Journals - Libraries Australia

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.

Search		Q Search	Add search to favourites
Within	All resources	•	Share search query
Collections	Advanced searches	Remote repositories	Search other repositories
All resources Books	Learning resources advanced search eReserve	Books - Libraries Australia Journals - Libraries Australia	
eReserve articles	ereseive	MERLOT	► Sort
Journals			
Learning resources			▼ Filter
LTI Collection			
Teaching resources			Filter by owner
***	comments Add to favourites Add to hierarchy		L Select user
LTI Bookfir	nder O		Filter by date modified
Locate copies Status: Live	of books Last updated:5 minutes ago		After

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.

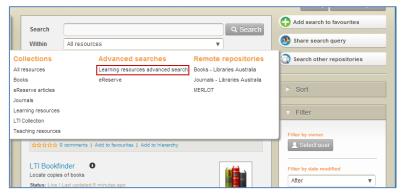


Figure 20 Select an advanced search

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			Q Search	
Within	Learning resources advanced search 🔻			
Format of I	resource			
Audio		Video	Image	
Document	t	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.				
	esource type ct one or more			
Diagram		Exam	Exercise	
Figure		Graph	Index	
Lab demo	nstration	Lecture	Narrative text	
Problem s	tatement	Questionnaire	Self assessment	
Simulation		Slide	Table	
Diagram		Exam	Exercise	
Figure		Graph	Index	
Lab demo	nstration	Lecture	Narrative text	
Problem s	tatement	Questionnaire		
			Q Search	

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 Q Search to display the search results page with search criteria in place. An example is shown in Figure 22.

		✓ Help ✓ Screen options
Search Within	Q. Search	Add search to favourites Share search query
Where	/item/lom/technical/format is image ▶ Edit query - clear	Search other repositories
		➢ Sort
Searcl	h results Showing 1 to 2 of 2 results	▼ Filter
Sample EQU Track betwe Status: Live	ELLA content: Photos, video and web sites about the Overland ene Cradle Mountain and Lake St Clair in Tasmania.	Filter by owner
***	0 comments Add to favourites Add to hierarchy	Filter by date modified
Sample EQU	ELLA content: Photos from the Walls of Jerusalem in Tasmania Last updated:4 years and 9 months ago Keywords found in attachment content	
***	0 comments Add to favourites Add to hierarchy	

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 <u>Add search to favourites</u> 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 <u>Share search query</u> on page 23 for more information.
- Search other repositories external repositories can be searched and the results imported directly to a contribution wizard. See <u>Search Remote repositories</u> on page 27 for more information.
- **Sort** box—provides options for sorting the results list. See <u>Sorting and filtering</u> on page 23 for more information.
- **Filter** box—provides options for setting criteria to drill down to relevant search results. See <u>Sorting and filtering</u> 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.

				ALPHABETA PROFILE LOG OUT
PEARSON				Search
Number of results pe Search attach			3	V Help A Screen options
Jashboard	Add search to	favourites	Search	Add search to favourites
★ Favourites	Within All	h to favourites:	Conten	Share search query
My resources	Please enter a n EQUELLA res	ame for this search *		Search other repositories
Search	Search re	* indicates mandatory	field f 19 results	Sort
Contribute	EQUELLA Vid		Add	
Browse resources by format	Status: Live Last updated:1 year and 2 Relevance: 2.842			▼ Filter
E Training documentation	☆☆☆☆☆ 0 comments Add to favou	rites Add to hierarchy		Filter by owner
Eaching resources	EQUELLA Features			Filter by date modified
Administration documentation	An overview of the features of EQUELL Status: Live Last updated:9 months age Relevance: 2.802 Keywords found in at			After
🐲 More	ጵጵጵጵጵ 0 comments Add to favou	rites Add to hierarchy		
My tasks	EQUELLA Overview A document outlining EQUELLA function Status: Live I Last updated:7 months app		Overview Version 1	

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 Share search query 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.

Share search query	۲
Share search results as an RSS or Atom feed	
RSS feed	
Atom feed	
Share search results via URL The URL to the search results is	
http://alphabeta.equella.com/nav13/access/searching.do?in=all&q=equel	la&
Share search results via e-mail Enter an e-mail address	
Share only results viewable by guests	ail

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 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.

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 EQUELLA 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.

		ALPHABETA PROFILE LOG OU Search
Dashboard	Search Q Search Within All resources V	Help Screen options Add search to favourites Share search query
My resources	Search results Showing 1 to 10 of 79 results	Search other repositories
Contribute Browse resources by format Training documentation	Jamie Oliver cooks with ducks. An interesting new way of cooking duck. Status: Live Last updated 24 minutes ago	Sort results by Relevance Reverse order of results
	LTI Bookfinder Cocate copies of books Status: Live Last updated 27 minutes ago ☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy	▼ Filter Filter by owner Select user
My tasks 0 Notifications 0 Manage external resources	Farmous authors O A collection of information about some of the most famous authors of our day. Image: Status: Live Last updated 27 minutes ago ★★★★★☆ 2 comments Remove from favourites Add to hierarchy	Filter by date modified After
Manage resources	Taxonomies O Taxonomies guide Status: Live Last updated about 21 hours ago	

Figure 25 Sort and filter panels

Sort results

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

⊽ Sort		
Sort results by		
Title	▼	
Reverse order of results		

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.

⊽ Filter	
Filter by owner	
Filter by date modified	
After	

Figure 27 Filter box

The following filters are included:

Filter by owner

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

Select owner to filter by	8				
Select user(s)					
The search query can contain a name (first, last or login) or a partial name with a wildcard character (nam*).	r				
b Q Search					
O EQUELLA Beta beta					
O Beta2 Phase1 alphabeta					
O Jo Bloggs JBloggs					
O Greg Brown GBrown					
Select this	user				

Figure 28 Select owner to filter by dialog

Select a user (e.g. *Jo Bloggs*) then click Select this user 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.

Filter by ow	ner		
Jo Bloggs			
👤 Chan	je user	🗶 Clear	
Filter by dal			_
Filter by dat After		•	-

Figure 29 Filter by owner pane

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

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.

V	▼ Filter						
(Filter by owner Select user Filter by date modified						
	After					▼	
	0	Nov		v 20	013	¥	0
	Su	Мо	Tu	We	Th	Fr	Sa
						1	2
	3	4	- 5	6	- 7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	- 23
	24	25	26	27	28	29	30

Figure 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.

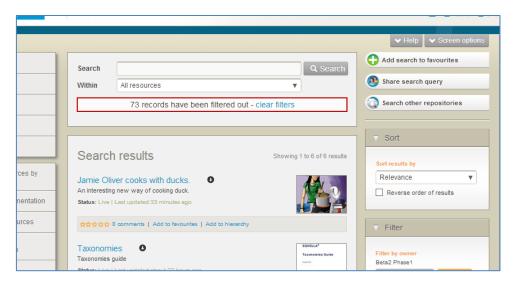


Figure 31 Filter message

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

 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.

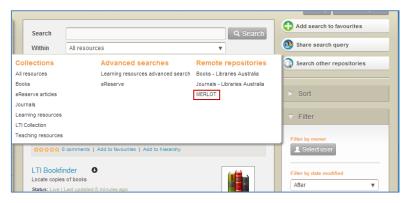


Figure 32 Access Remote repositories search

	ALPHABETA PROFILE LOG OU		
PEARSON	Remote repositories		
A Dashboard	Select a remote repository to search		
★ Favourites	Select a remote repository to search		
😫 My resources	Remote repository v		
C Search	Books - Libraries Australia		
Contribute	Journals - Libraries Australia		
Browse resources by format	MERLOT		
Training documentation			
Teaching resources			
Administration	· · · · · · · · · · · · · · · · · · ·		

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.

			ALPHABETA PROFILE LOG OUT
PEARSON			MERLOT
Co	ontribute > MERLOT		
Dashboard	Searching	MERLOT	⊽ Sort
★ Favourites	Search	Q. Search	Sort results by
S My resources	Community All	T	Rating
C Search	Material All		
Contribute	Category All	· · · · · · · · · · · · · · · · · · ·	▼ Filter
			Keyword constraint
Browse resources by format			All words
Training documentation			☐ Free
🚈 Teaching resources			Creative commons
Administration documentation			All
More			Technical format
More			
My tasks 0			Audience
Notifications			Mobile operating system iOS (Apple)
Manage external resources			Android Blackberry Windows
Manage resources			Mobile device type Phone
Manage activations			Tablet Other
k Reports			Creation date
Settings			

Figure 34 MERLOT Searching page

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

		ALPHABETA PROFILE LOG OUT
PEARSON		MERLOT
Co	tribute > MERLOT	
Jashboard	Searching MERLOT	▼ Sort
★ Favourites	Search project management Q. Sear	ch Sort results by
S My resources	Community All	Rating
C Search	Material All v	
Contribute	Category All V	▼ Filter
Browse resources by format	Results Showing 1 to 10 of 244 res	Keyword constraint All words
Training documentation	Basic Management Skills	Free
Teaching resources	This web site is a tutorial designed for engineering students, but the management skills are applicable to other disciplines. Topics included here are: Teams and Group	Creative commons
Administration documentation	Presentation Skills, Time Mana	All
More	Detail URL: http://www.meriot.org/meriot/view/Material.htm?id=77888 URL: http://www.see.ed.ac.uki~perard/Management/? http://oldees.ee.ed.ac.uki~gerard/Management/	Technical format
🛕 My tasks 💽	Breast Cancer: Essential Knowledge for Nurses These learning modules were made possible by The Komen Maryland Affiliate Nursi	Audience All
Notifications	Partnership: Advancing Education and Practice, a generous grant from the Maryland Affiliate of Susan G. Komen for the	Mobile operating system DioS (Apple)
Manage external resources	Detail URL: http://www.meriot.org/meriol/viewMaterial.htm?id=328476 URL: http://coursediccs.umaryland.edu/Projects/Komen/webpages/index.htm	Android Blackberry Windows
Manage resources	Introduction to Project Management The site explains the basic principles and applications of project management	Mobile device type Phone Tablet Other

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.

•	Sort	
s	ort results by	
ſ	Rating v	
	Rating	
	Title	
7	Author	
	Material type	
	Date created	

Figure 36 MERLOT Sort box

⊽ Filter	
Keyword constraint	
All words	•
Free	
Creative commons	
Language	
All	•
Technical format	
All	•
Audience	
All	•
Mobile operating system	
iOS (Apple) Android	
Blackberry	
Windows	
Mobile device type	
Phone	
Tablet Other	
Creation date	
After	

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.

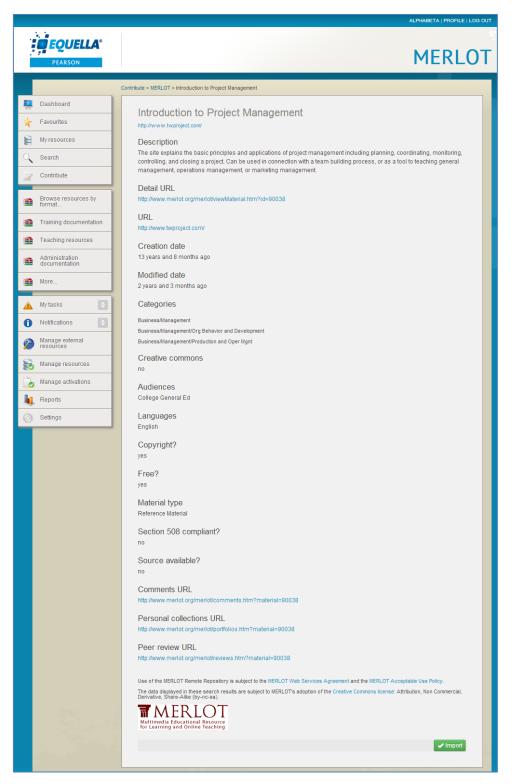


Figure 38 Resource details

To import results

1. Click **Import** 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.

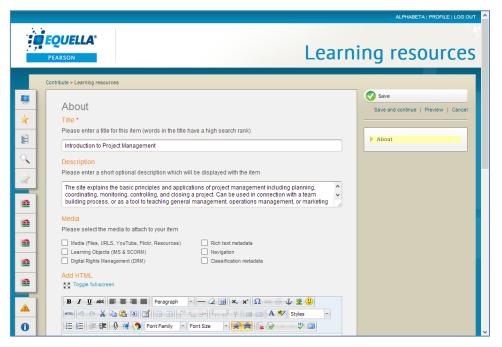


Figure 39 Contribution wizard with pre-filled fields

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.

	ALPHABETA PROFILE LOG OUT
PEARSON	Books - Libraries Australia
	Contribute > Books - Libraries Australia
Dashboard	Searching Books - Libraries Australia
★ Favourites	Search project Q Search
😂 My resources	Search project Q. Search
C Search	
Contribute	Results Showing 1 to 10 of 170,969 results
Browse resources by format	Classification and survey of pontoons supports of plants :NI 170 (project). Bureau Veritas
E Training documentation	The Prometheus Project :mankind's search for long-range goals.
💼 Teaching resources	Feinberg, Gerald, 1933-
Administration documentation	LNG review 1977: a study of marine operations, ship technology, project finance, lng prices and market prospects for LNG. Faridary, E.K.
💼 More	Transmission and orbital constraints in space-related programs :project description /
🔺 Mytasks 🛛 🚺	Hiebert, A. L.
Notifications	Swimming and diving :a bibliography : project of the council for National Cooperation in aquatics /
Manage external resources	Council for National Cooperation in Aquatics

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.

		ALPHABETA PROFILE LOG OUT
PEARSON		Dashboard
		✓ Help ✓ Screen options
Dashboard	▼ Welcome to EQUELLA	
Favourites	Select the SCREEN OPTIONS button to display a li	ist of other portlets that can be added to your
My resources	Select the HELP button to show or hide online help.	
Search		
Contribute	▼ Quick search	
Browse resources by format	٩	Famous authors QTI Example package
Training documentation	▼ Browse	★ EQUELLA 6.2 Beta Phase I
Teaching resources		Show all →
Administration documentation	 Browse resources by format Resources cataloged by the type of resource, including: Audio Video Images Documents 	✓ My resources
More	 Training documentation (21) Teaching resources (80) Search all available teaching resources 	Published (7) Drafts (0)
My tasks 0	 Administration documentation (80) Research repository resources (80) 	G Scrapbook (0)
Notifications	Examinations (80)	📕 Moderation queue (0)
Manage external resources		In moderation (0)

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.

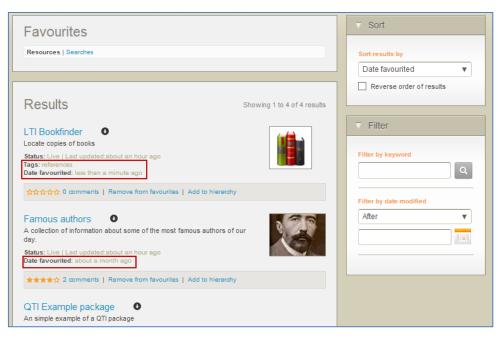


Figure 42 Favourite resources

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 favourited** 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 <u>Add search to favourites</u> 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.

Favourites		Sort
Resources Searches	Sor	t results by
	N	ame 🔻
		Reverse order of results
Results	Showing 1 to 2 of 2 results	
EQUELLA resources		Filter Bottom Margin
Query: equella	Filt	er by keyword
	X Remove	Q
Pre July 1st 2013		
	* Remove	er by date modified
	A	ter 🔻

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 favourited** 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.

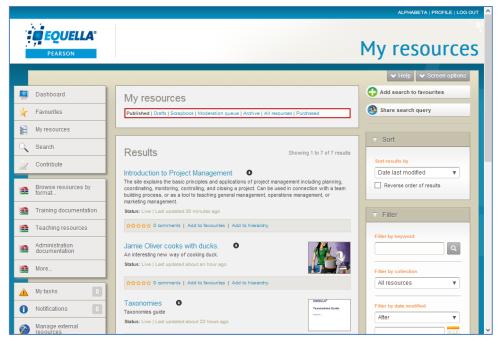


Figure 44 My resources grouping links

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

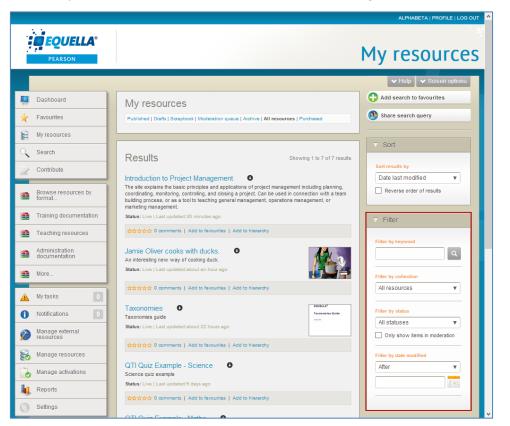
- **Published**—displays resources that are in a *live* state through having been moderated or through belonging to a collection that does not require moderation. Additionally, resources with a status of review are displayed, and are live resources which are due for review.
- **Drafts**—resources that 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.

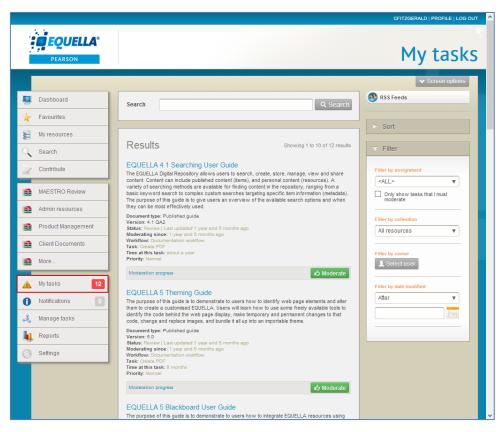


Figure 46 My tasks results page

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.
- 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.

⊽ Sort	
Sort results by	
Priority	•
Priority	
Expiry date	
Time waiting in ta	ask
Title	

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.

Filter	
Filter by assignment	
<all></all>	7
Only show tasks that I must moderate	
Filter by collection	
All resources	-
Filter by owner Select user Filter by date modified	
After	/

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 Selectuser to display the Select owner to filter by dialog and search for and select the required owner. See <u>Filter by owner</u> 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.

		BETA PROFILE LOG OUT
PEARSON		Notifications
		Screen options
E Dashboard	Search Q Search	RSS Feeds
★ Favourites		Selection (0)
My resources		
C Search	Results Showing 1 to 10 of 11 results	You have selected 0 notifications Select all notifications in this search
Contribute	WIRIS plug-in test formula A WIRIS formula for testing purposes	Search
Browse resources by format	Reason: Bad URL	Clear selected
🛕 Mytasks 🛛 🚺	Joseph Conrad - A heart of darkness? An essay looking at the life of Joseph Conrad and how it affected his writing.	▼ Filter
1 Notifications	Reason: Purchased resource updated	Filter by notification reason
Manage external resources	🗶 Clear 🕹 Select	<all></all>
Sources Manage resources	Fundamental mathematics Theory papers and quizzes for fundamental mathematics - primary school	Filter by collection
Manage activations	Reason: Purchased resource updated	All resources V
L Reports		Filter by owner
Settings	The Indian Ocean Tsunami December 26, 2004 This site contains photographs, video, and an online diary made by Dr. Jose Borrero of the University of Southern California Tsunami research group, who visited the Aceh province of Northern Sumatra, one of the areas hardest hit by the Isunami and earthquake, just days after the	Filter by date modified
	disaster occurred. Educational levels: Middle school. High school. Undergraduate lower division	Affor

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.

▼ Filter
Filter by notification reason
Filter by notification reason
<all></all>
Filter by collection
All resources V
Filter by owner
Filter by date modified
After 🔻

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 <u>Filter by owner</u> 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.

			BETA PROFILE LOG OUT
	EQUELLA ® PEARSON	Manage exter	nal resources
			✓ Screen options
N	Dashboard	Search Q Search	Add search to favourites
\star F	avourites	Within Demo Moodle V	
9 N	ly resources		Selection (0)
Q 8	Search	Results Showing 1 to 10 of 98 results	You have selected 0 external resources Select all external resources
D 0	Contribute		
i fo	Browse resources by ormat	CalendarControl.png EQUELIA resource: 3878cb4-376a-4ccb-9cf8-d96d24e30c90 Course: EOUELIA 101 Location: 15 April - 21 April Date added : about a month apo	Perform an action
<u> </u>	/ly tasks	Date modified: about a month ago Enrollments: 2 Instructor: EQUELLA Demo	► Sort
0	Notifications 11	Visible: true Status: Deleted Last updated:about a month ago	▼ Filter
6 😥	lanage external esources	🖉 Edit 🗶 Remove 🕼 Select	Filter by status ▼ Show hidden courses and items
🥫 N	lanage resources	QTI Example package (Scoring) EQUELLA resource: 52114d50-32c3-45e3-9657-4558d99ea7f66	
🐻 N	lanage activations	Course: EQUELLA 101 Location: 15 April - 21 April Date added: about a month ago	Filter by LMS course <select a="" course=""> ▼</select>
II. F	Reports	Date modified: about a month ago Enrollments: 2 Instructor: EQUELLA Demo	
<u>ि</u> इ	Settings	Visible: true Status: Deleted Last updated:about a month ago	
		🖍 Edit 🗶 Remove 🗤 Select	

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** dropdown 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** dropdown list before results are displayed. An example is shown in Figure 52.

PEARSON	Manage external resourc	es
Nashboard	Search Q Search Add search to favourites	ons
★ Favourites ₩ resources	Within Demo Moodle V <select a="" connector=""> Selection (0)</select>	
Search	Demo Moodle You have selected 0 external resources Results Showing 1 to 10 of 98 results > Select all external resources	
Contribute	CalendarControl png	

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.

⊽ Sort		
Sort results by		
Date added	•	
Date added		
Name		
Course		_

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.

7 Filter	
Filter by status ✓ Show hidden courses and items	
Filter by LMS course	
<select a="" course=""></select>	
<select a="" course=""></select>	
Demo	
EQUELLA 101	
EQUELLA 201	

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.

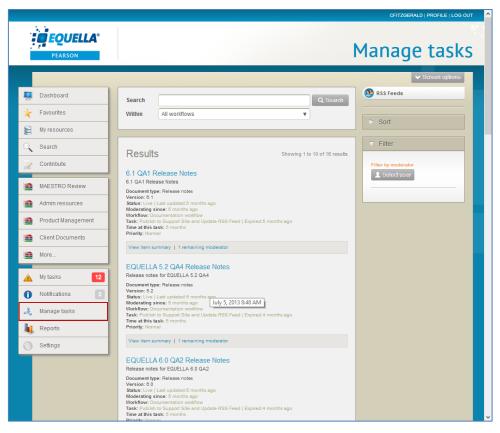


Figure 55 Manage tasks page

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** dropdown 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.

			✓ Screen options
	Search		Q Search RSS Feeds
_	Within	All workflows	> Sort
		Documentation workflow	⊽ Filter
	6.1 QA1 R	elease Notes	of 16 results Filter by moderator
	Version: 6.1 Status: Live I Moderating si Workflow: Doo		

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.

⊽ Sort		
Sort results by		
Priority		
Priority		
Expiry date		
Time waiting	in task	
Title		

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.

⊽ Filter	
Filter by moderator	

Figure 58 Manage tasks filter box

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

• Filter by moderator—click Selectuser to display the Choose moderator to filter by and search for and select the required user. See <u>Filter by owner</u> 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 <u>Search page</u> on page 16 and <u>Sorting and filtering</u> 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.

			ALPHABETA PROFILE LOG OUT
	PEARSON	Manag	e activations
			V Screen options
	Dashboard	Search Q Search	Selection (0)
\star	Favourites		You have selected 0 activations Select all activations in this search
000	My resources		
0	Search	Results Showing 1 to 2 of 2 results	O Perform an action
	Contribute	Red Meat Red meat recipes	
	Browse resources by format	Attachment Red meat Course: EQUELA 101 From: Tuesday, November 19, 2013 Until: Wednesday, November 27, 2013	Sort
	Training documentation	Status: Active Citation: 'Red Meat' n.d. in Oliver, Jamie, Jamie Oliver's 15 minute meals, 1st ed, n.p., pp. 35-58.	Relevance
	Teaching resources	🖒 Select	Reverse order of results
	Administration documentation	Red Meat Red meat recipes	▼ Filter
1	More	Attachment: Red meat Course: EQUELLA 101 From: Tuesday, October 15, 2013	Filter by course
Â	My tasks	Uniti: Tuesday, October 15, 2013 Status: Inactive Citation: 'Red Meat' n.d. in Oliver, Jamie, Jamie Oliver's 15 minute meals, 1st ed, n.p., pp. 38-58.	Select course
0	Notifications 0	🖒 Select	Filter by owner
Ø	Manage external resources		
5	Manage resources		Activation range Start date between
	Manage activations		and
h	Reports		
<u></u>	Settings		· · · · · · · · · · · · · · · · · · ·

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	
Filter by owner	
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 Q Search. An example is shown in Figure 61.



Figure 61 Select a course dialog

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

- Filter by owner—click Selectuser to display the Select owner to filter by dialog and search for and select the required owner. See <u>Filter by owner</u> 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.

Select type		۲
Pick resource type		^
Upload a file File from file system		
EQUELLA Resource		
URL Attach a URL to a resource on the web		
Web pages Select existing or author new web pages		
Google Books 1. Embed a reference from Google Books		
Kaltura Attach streaming media		
YouTube Embed a YouTube video		
Flickr Embed a Flickr image url		
External tool provider (LTI)		~
	2.	Next

Figure 62 Contribution attachment control—Google Books

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

Add Goo	gle Book	8
Add a	reference from Google Books	
Search	Q Search Google Books	

Figure 63 Add Google Book

2. Enter keywords into the search text box then click Q 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.

Add Goog	gle Book	8
	reference from Google Books	^
Search	tasmania history Q. Search Google Bo	oks
	The History of Tasmania John West	
	Tasmania's Wildemess Battles Athough told mostly from an environmentalist's point of view, this book is a factual record of events. Greg Buckman	
	The history of discovery in Australia, Tasmania, and New Zealand William How#t William How#t	~
		o start 🖌 🖌 Add

Figure 64 Add Google Book results page

3. Select the required references then click Add.

iTunes U search

iTunes U^{TM} 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.

Select type		8
Pick resource type		^
Upload a file File from file system		
EQUELLA Resource		
URL Attach a URL to a resource on the web		
Web pages Select existing or author new web pages		
Google Books Embed a reference from Google Books		
Kaltura Attach streaming media		
YouTube Embed a YouTube video		
iTunes U Select resources from iTunes U	1.	
Flickr		•
		2. Next

Figure 65 Contribution attachment control—iTunes U

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

Add iTunes U resource	8
Please choose your track	
_ Texas A&M University	
CAMPUS COMMUNITY	
⊟-Camtasia Relay Test	
⊟-Group 1	
LunesU_TestingPod_and_Phone20100805_04.36.08PM + Add	
Bac	ck to start

Figure 66 iTunes U resource page

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

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 Next. An example is shown in Figure 67.

Select type	8	
Pick resource type		^
Upload a file File from file system]	
EQUELLA Resource EQUELLA Resource		
URL Attach a URL to a resource on the web		
Web pages Select existing or author new web pages		
Google Books Embed a reference from Google Books		
Kaltura Attach streaming media		
YouTube Embed a YouTube video 1.		
Flickr Embed a Flickr image url	Ī	
External tool provider (LTI)		v
	Next	

Figure 67 Contribution attachments control—YouTube

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

Add You7	ube video	۲
Add Yo	ouTube video	
Search	Q Search YouTube	
		Back to start

Figure 68 Add YouTube video page

2. Enter keywords into the search text box then click <u>Q Search YouTube</u>. 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.

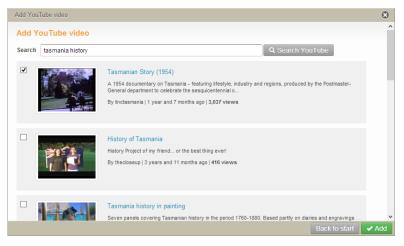


Figure 69 Add YouTube video results page

3. Select the required videos then click Add

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 Next. An example is shown in Figure 70.

Select type	C	3
Pick resource type		^
Upload a file File from file system]	
EQUELLA Resource EQUELLA Resource		
URL Attach a URL to a resource on the web		
Web pages Select existing or author new web pages		
Google Books Embed a reference from Google Books		
Kaltura Attach streaming media		
YouTube Embed a YouTube video		
Flickr Embed a Flickr image uni 1.		1
External tool provider (LTI)	Ī.	~
	Vext	

Figure 70 Contribution attachments control—Flickr

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

Add Flickr imag	e		\odot
Search	Q Search	⊽ Sort	^
Over	text and tags	Sort results by	
This product uses	the Flickr API but is not endorsed or certified by Flickr.	Relevance Reverse order of results	
	r keywords. ct from the filter options in the filter box.	Filter Date photo taken After Filter by Creative Commons licence unrestricted by by	<

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 **Q Search**. The **Add Flickr image** results page displays. An example is shown in Figure 72.

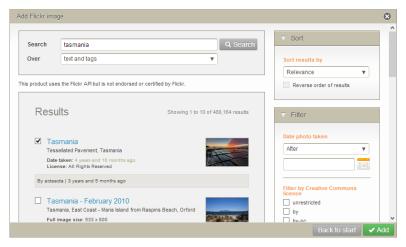


Figure 72 Add Flickr image results page

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 **Add**.

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.

⊽ Sort	
Sort results by	
Relevance	•
Relevance	
Interestingness	
Date taken	
Date posted	

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.

	e photo taken
A	ller V
Filt	er by Creative Commons
	unrestricted
	by
	by-nc
	by-nd
	by-sa
	by-nc-nd
	by-nc-sa
Flic	kr Institutions
[A	ny] 🔻
Flic	kr user's Flickrld, username or ail

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 dropdown 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 Next . An example is shown in Figure 75.

Select type	8)
Pick resource type		^
Upload a file File from file system		
EQUELLA Resource EQUELLA Resource		
URL Attach a URL to a resource on the web		
Web pages Select existing or author new web pages		
Google Books Embed a reference from Google Books		
Kaltura Atlach streaming media 1.		
YouTube Embed a YouTube video		
Flickr Embed a Flickr image url		
External tool provider (LTI)		
	Next	

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 **Next** to display the **Add Kaltura media** search page, as shown in Figure 77.

Add Kaltura media Add Kaltura media Search Q. Search Kaltura				
Add K	altura media			
Search	Q Search Kallura			
	Back to s	start		

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 Q Search Kaltura. The search results display. An example is shown in Figure 78.

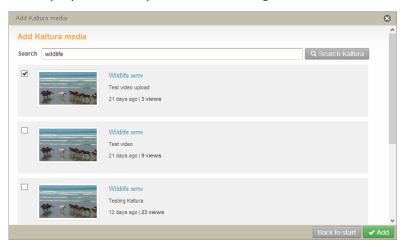


Figure 78 Add Kaltura media search results

4. Select the required resources then click **Add**.

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.

		ALPHABETA PROFILE LOG OUT
PEARSON		Dashboard
		✓ Help ✓ Screen options
🜉 Dashboard		
★ Favourites	Select the SCREEN OPTIONS button to display a lis	st of other portlets that can be added to your
S My resources	Dashboard. Select the HELP button to show or hide online help.	
C Search		
Contribute	Quick search	✓ My Favourites
Browse resources by format	٩	★ Search results for "Pre July 1st 2013" ★ Search results for "EQUELLA resources"
2 Training documentation	> Browse	LTI Bookfinder Famous authors
2 Teaching resources		CTI Example package
Administration documentation		Show all →
More		
🔥 Mytasks 🛛 🚺		► My resources

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.

		ALPHABETA PROFILE LOG OUT
PEARSON		Browse
Jashboard		Help Screen options Add search to favourites
★ Favourites	Browse resources by format	Share search query
My resources	Resources cataloged by the type of resource, including: Audio Video Images Documents Training documentation (21)	
C Search	Teaching resources (80) Search all available teaching resources	
Contribute	 Administration documentation (80) Research repository resources (80) 	
Browse resources by format	Examinations (80)	
Training documentation		
Teaching resources		
Administration documentation		
More		
A Mytasks		

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 <a>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.

	ALPHABETA PROFILE LOG OL
PEARSON	Dashboard
Browse — display Favountes — display Formatted text — d My resources — di Quick search — di RSS or Alom feed Recent contribution Scripted — a custc Tasks = displays	to add to your Dashboard? s topics that can be browsed for content tays favourite resources and searches tisplays configured text splays inks to personal content splays and to personal content splays a search box for searching EQUELLA — displays the latest entries for the configured collections som display controlled by advanced scripting displays an overwew of most congested tasks a list of tasks that require your attention lays a mini-browser with configured content
Dashboard	Velcome to EQUELLA
Favourites	Select the SCREEN OPTIONS button to display a list of other portlets that can be added to your Dashboard
My resources	Select the HELP button to show or hide online help.
Search	

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.

EQUELLA °		
PEARSON		Create portlet
	Dashboard > Create portlet	✓ Help
Jashboard	Create a new Browse portlet	
★ Favourites	Create a new browse portier	
My resources	* Title Browse	
C Search		* indicates mandatory fields
Contribute		Save Cancel
Browse resources by format		
Training documentation		

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.

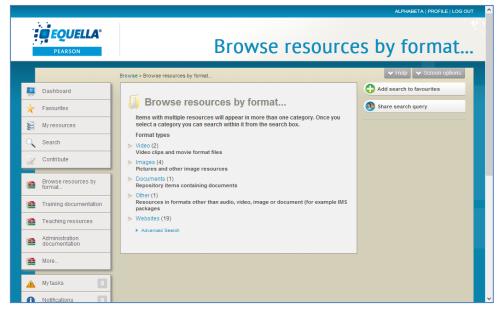
		ALPHABETA PROFILE LOG OUT
PEARSON		Dashboard
		✓ Help ✓ Screen options
Dashboard	Welcome to EQUELLA	
Favourites	Select the SCREEN OPTIONS button to display a	list of other portlets that can be added to your
My resources	Dashboard. Select the HELP button to show or hide online help	D.
Search		
 Contribute 	▼ Quick search	▼ My Favourites
Browse resources by format	٩	Search results for "Pre July 1st 2013" Search results for "EQUELLA resources"
Training documentation	▼ Browse	TI Bookfinder Famous authors
Teaching resources	Browse resources by format Resources cataloged by the type of resource, including: Audio Video Images Documents	🗙 QTI Example package
More	Video images uocuments Training documentation (21) Teaching resources (80) Search all available teaching resources	Show all +
My tasks 0	 Administration documentation (80) Research repository resources (80) 	My resources
Notifications 0	Examinations (80)	
Manage external resources		

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.

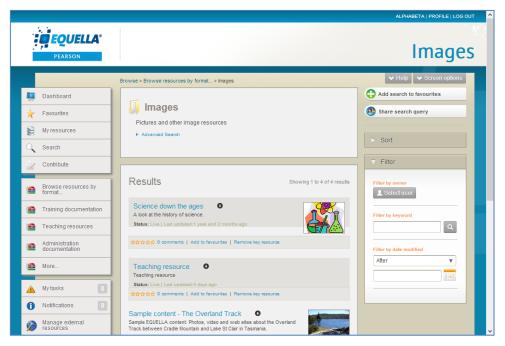


Figure 85 Hierarchy with subtopic and results

Click **Add search to favourites** to save the current search to Favourites. (See <u>Add</u> <u>search to favourites</u> on page 22 for more information.)

Click **Share search query** to open the **Share search query page** and select the share method. (See <u>Share search query</u> 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.

PEARSON	Searching and content indexing
	Settings > Searching and content indexing
Dashboard	Searching
★ Favourites	
S My resources	Default results order Relevance V
C Search	Allow non-live results Show the 'include results that are not live' checkbox
Contribute	Authenticated feeds
Browse resources by format	Generate authenticated RSS and Atom feed links
Training documentation	Searching terms boost
🚞 Teaching resources	Fields with the boost value set to 'Off will not be searched
Administration documentation	Tite
🚈 More	Off x0.25 x0.5 No boost x1.5 x2 x4 x8
🔺 Mytasks 💽	Other metadata Off x0.25 x0.5 No boost x1.5 x2 x4 x8
Notifications	Attachment content
Manage external resources	Off x0.25 x0.5 No boost x1.5 x2 x4 x8
📷 Manage resources	Content indexing
Manage activations	Web page indexing () Do not index attached web pages
L Reports	vieu page invexing O inde index attached web page only
🔇 Settings	O Index the linked web page and any secondary linked web pages
The Astronomical State	√ Save
	Search filters Add a new search filter

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.

			ALPHABETA PROFILE LOG OUT
PEARSON			Search
			V Help A Screen options
Include results that Number of result		V	
Search a	ttachments 🔽		
Dashboard	Search	Q. Search	Add search to favourites
✓ Favourites	Within All resources	•	Share search query
My resources			Search other repositories
Search	Search results	Showing 1 to 10 of 98 results	
Z Contribute		-	> Sort
Browse resources by format	Kaltura test item • Kaltura item Status: Live Last updated about an hour ago	- 12	Filter Filter by owner
	☆☆☆☆☆ 0 comments Add to favourites Add to hierarchy		2 Select user

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 Save.

Searching terms boost

When the results sort order is set to *Relevance*, and search terms are entered, the results display a relevance score. (See <u>Relevance scores and searching attachments</u> 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 va	Fields with the boost value set to 'Off will not be searched									
Title						_				
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 Save.

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 Save.

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.

Search Within All resources	Q Search	Add search to favourites Add search query Share search query Search other repositories
Search results	Showing 1 to 10 of 81 results	> Sort
Kaltura test item ● Kaltura item Status: Live Last updated:about 6 hours ago ☆☆☆☆☆ 0 comments Add to favourites Add to hild	erarchy	 ▼ Filter Filter by owner ▲ Select user
Introduction to Project Management • The site explains the basic principles and applications of coordinating, monitoring, controlling, and closing a projeci building process, or as a tool to teaching general managemarketing management. Status: Live Last updated:a day ago	t. Can be used in connection with a team	Filter by date modified
☆☆☆☆☆ 0 comments Add to favourites Add to hid Jamie Oliver cooks with ducks. An interesting new way of cooking duck. Status: Live Last updated:a day ago	erarchy	Filter by resource type Image
☆☆☆☆☆ 0 comments Add to favourites Add to him	erarchy	

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.

Attachment content	Off	x0.25	x0.5	No boost	x1.5	x2	x4	x8		
Content index	ing									
Web page indexing	 <td>Index the lin</td><td>ked web</td><td>d web pages page only page and an</td><td></td><td>iry linked w</td><td>eb pages</td><td></td><td></td><td></td>	Index the lin	ked web	d web pages page only page and an		iry linked w	eb pages			
									✓ Save	
Search filters Add a new search filter	er									

Figure 91 Add a new search filter link

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

* Name	Image	
* MIME Types		,
	equella/plan	
	QTI quiz (equella/qtitest)	
	SCORM Package (equella/scorm-package)	
	✓ Image (image/bmp)	
	✓ Image (image/gif)	
	Image (image/ief)	
	✓ Image (image/jpeg)	
	✓ Image (image/png)	
	Scalable Vector Graphics (image/svg+xml)	

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 Save. The Search setting page displays with the new filter listed. An example is shown in Figure 93.

Content index	ing	
Web page indexing	Do not index attached web pages	
	 Index the linked web page only Index the linked web page and any secondary linked web pages 	
		✓ Save
Search filters		
Search filters ▼		
		Edit Remove

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	
Filter by date modified	▼
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 <u>http://equella.custhelp.com</u>.