

# EQUELLA®

## Copyright (CA and CLNZ) Configuration Guide Draft

*Version 6.4*

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# Copyright configuration overview

The purpose of this guide is to provide system administrators, content managers, copyright administrators/librarians and system designers with examples of how to use and manage copyright compliance in the EQUELLA Digital Repository in accordance with the *Copyright Act (1968) plus amendments*, in Australia, and the *Copyright Act (1994) plus amendments*, in New Zealand.

In Australia, the Educational Use and Fair Dealing statutory licences agreed to by educational institutions are managed by the Copyright Agency (CA, formerly CAL). In New Zealand, equivalent licences are managed by Copyright Licensing New Zealand (CLNZ).

Further information on copyright in Australia and in New Zealand can be found on various websites, including those of CA and CLNZ, the Australian Copyright Council, the Copyright Council of New Zealand, and AUSTLII.

The examples in this guide are based on the schemas, citations, XSL transformations, collections, courses, remote repository searches, advanced searches and security that are provided with the *EQUELLA Vanilla Copyright Collections* and provide a starting point for creating custom configurations that closely fit the institution's purpose. Your consultant will participate in the initial setup of your copyright collections, but this guide covers the basics of copyright collection configuration. Information on institution management is provided in the *EQUELLA Installation and Administration Guide*.

It is recommended that users read the *EQUELLA Copyright Compliance Overview Guide* before the copyright configuration tasks are commenced. Further information on contributing copyright resources is provided in *EQUELLA Copyright Resource Management User Guide*.

Please note that this guide is based on Australian and New Zealand Copyright regulations. It has been developed to reflect the full capabilities of EQUELLA and as such may differ in appearance from your own installation.

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## Copyright compliance configuration process

In this guide the user will:

- either upload the default copyright metadata schema using the **Metadata Schemas** tool in the **Administration Console**
- or add the required copyright metadata schema nodes to an existing schema, as specified in this document, by using the **Metadata Schemas** tool in the **Administration Console**
- either upload the three default copyright collection definitions using the **Collection Definitions** tool in the **Administration Console**
- or create the three copyright collection definitions as required to manage copyright in EQUELLA, using the **Collection Definitions** tool in the **Administration Console**.

**NOTE:** the collections must follow the requirements specified in this document. Failing to do so may mean that the copyright software which sits within EQUELLA will be unable to calculate percentages and will therefore be unable to block activations which would breach copyright.

**Once the schema nodes and copyright collection wizards are in place the administrator will:**

- Configure copyright licensing using the **Collection Definitions** tool to edit the *Extensions* tab in the collection wizards
- Add course details using the **Courses** tool
- Configure user permissions by assigning the copyright privileges appropriate for the user, using the **Security Manager** tool
- Upload the Electronic Use Survey report using the **Reporting** tool
- Create searches for library and other compliant databases using the **Remote Repositories** tool
  - Link the appropriate XSLT and parent (holding) collection to each remote search
- If required, create advanced searches using the **Advanced Searches** tool
- If required, create browse hierarchies using the **Hierarchy Editor** tool

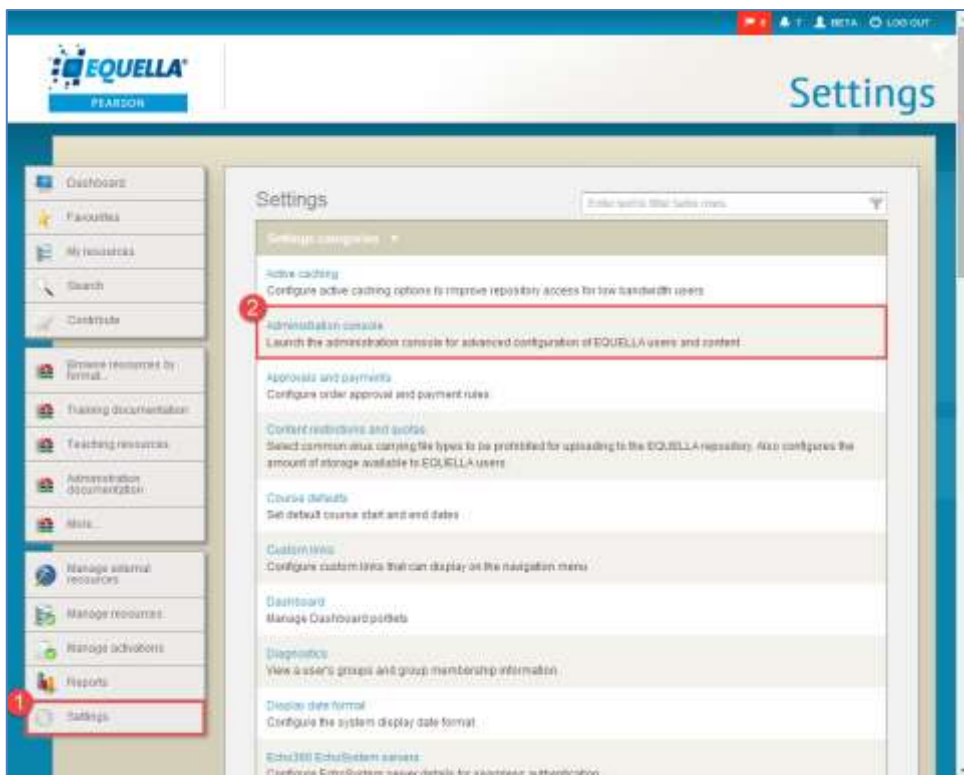
# Administration console

The EQUELLA Administration Console provides a range of tools and plug-ins that simplify the management and configuration of EQUELLA.

Further information on the Administration Console is provided in the *EQUELLA Administration Overview Guide*.

## To access EQUELLA and open the Administration Console

1. From the navigation menu, select **Settings, Administration Console**. An example is shown in Figure 1.



**Figure 1 Settings – Administration Console**

2. The Administration console displays, as shown in Figure 2.



**Figure 2 Administration console—Security Manager**

The number of tools available to a user in the Administration Console depends on the privileges associated with that user's account. Further information is provided in the *EQUELLA Security Guide*.

All available tools are displayed on the left-hand side of the page.

For the examples in this guide the **Metadata Schemas**, **Collection Definitions**, **Courses**, **Remote Repositories**, **Advanced Searches** and **Reporting** tools are required.

# Copyright metadata schema

A metadata schema (schema) is a storage structure used to hold a resource's metadata. Resource metadata is used in searching and managing resources within the EQUELLA repository. A schema that conforms to an available standard increases the utility and interoperability of resources. The most widely recognised metadata schema for learning objects is the internationally recognised IEEE 1484.12.1 Standard for Learning Object Metadata (LOM) available at <http://ieeeltsc.org/>.

EQUELLA provides a LOM compliant schema called the *Generic Schema* with the *EQUELLA Vanilla Institution* and it provides a starting point for creating custom metadata schemas that closely fit the institution's purpose. The examples in this section are based on the *Generic Schema* but only mandatory nodes required to create Copyright copyright compliant collection definitions are described. Other nodes can be added as per the institution's requirements; however it is essential that nodes are not removed and the structure and naming conventions are maintained.

Further information on schemas is provided in the *EQUELLA Metadata Schema Configuration Guide*.


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To enable the copyright compliance features in EQUELLA to function correctly, a specific Copyright schema is required.

## Create the copyright schema

Metadata schemas are created and modified using the **Metadata Schemas** tool available in the **Administration Console**.

### To create a new EQUELLA copyright metadata schema from scratch

1. Select the **Metadata Schemas** tool in the Administration Console.
2. Select the default schema
3. Click  **Edit** to display the **Schema Editor**.

The **Schema Editor** provides an interface for schema creation with the following tabs:

- **Details**—includes general information for the schema and association of resource paths.
- **Editor**—creates a schema to gather the metadata.
- **Transformations**—enables the conversion of metadata from uploaded schemas to facilitate import and export of metadata and attachments between repositories.
- **Citations**—gathers citation information from the schema metadata and transforms it into the appropriate format from uploaded XSLTs.
- **Access Control**—controls access to the schema.



## Details tab

The Details page includes general information for the schema and association of resource paths.

4. Enter a **Schema Name** (e.g. *Generic schema - CAL*) and **Description** for the schema on the **Details** page. An example is shown in Figure 3.

**Figure 3 Schema Editor—Details page**

The **Resource Name Path** and **Resource Description Path** are pre-selected in the default schema, once the relevant nodes have been created in the schema. See [To add schema elements](#) on page **Error! Bookmark not defined..** These nodes must be mapped into the 'title' edit box controls in each of the three copyright collections to avoid the record display showing the EQUELLA uuid in place of the title.

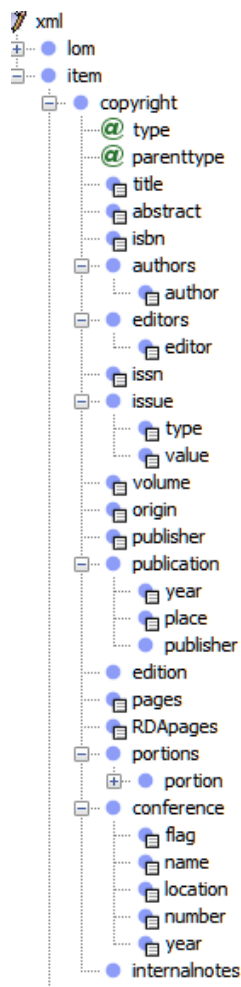
## Editor tab

All schemas have the base node *xml* and must contain a node for the *name* and *description* of contributed resources (which are recorded in the **Resource Name Path** and **Resource Description Path** fields on the *Details* tab). Further nodes specific to copyright can be added.

Some schema nodes need to be checked as **Searchable by Free Text** (searchable) and **Index for Advanced Searches** (index) during creation.


(NOTE: The nodes indexed for advanced searches are used for advanced searches and duplication and uniqueness checking.)

An example Copyright schema is shown in Figure 4.







**Figure 4 Copyright Schema nodes**

To enter the Copyright schema in the Hierarchy pane

1. Select the **Editor** tab to display the **Editor** page.
2. Select the **xml** node.
3. Click  to display the **Target Details** section.
4. Enter a node **Name** (e.g. *item*).
5. Select the **Type** from the drop-down list (e.g. *text*). An example is shown in Figure 5.









**Figure 5 Editor page—example item node**

6. Click  to create a new child node.
7. Enter the node **Name** (e.g. *copyright*) and select the **Type** (e.g. *text*).
8. Click the  button to create a new node.
9. Enter the node **Name** (e.g. *itembody*) and select the **Type** (e.g. *text*).
10. Click  to create a new child node.
11. Enter the node **Name** (e.g. *name*) and select the **Type** (e.g. *text*).
12. Check the **Searchable by Free Text** checkbox to make the node searchable.
13. Click  to create a new node.
14. Enter the node **Name** (e.g. *description*) and select the **Type** (e.g. *text*).
15. Check the **Searchable by Free Text** checkbox, an example is shown in Figure 6.



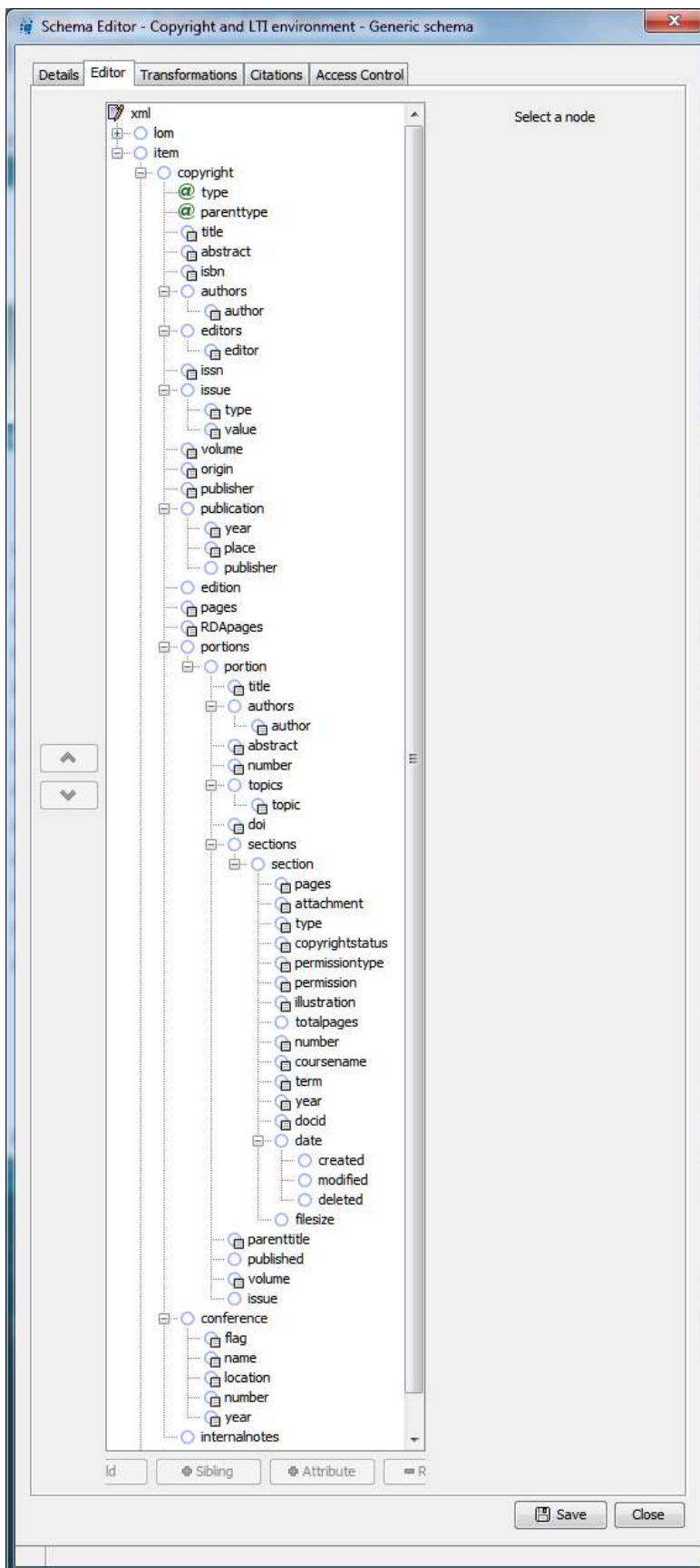
**Figure 6 Editor page—example description node**

16. Select the node (e.g. *copyright*).
17. Click  to create a new attribute child node. (NOTE: The ,  and  buttons are inactive when an attribute node is selected.)
18. Enter the node **Name** (e.g. *type*) and select the **Type** (e.g. *text*).
19. Check the **Searchable by Free Text** and **Index for Advanced Searches** checkboxes.





20. Select the node (e.g. *copyright*).
21. Click the  button to create a new attribute child node.
22. Enter the node **Name** (e.g. *parenttype*) and select the **Type** (e.g. *text*).
23. Select the node (e.g. *copyright*).
24. Click  to create a new child node.
25. Enter the node **Name** (e.g. *title*) and select the **Type** (e.g. *text*).
26. Check the **Searchable by Free Text** and **Index for Advanced Searches** checkboxes.
27. Add further nodes to complete the schema. Examples are shown in Figure 4 and Figure 7.

Nodes can be rearranged using the up and down arrows on the left of the editor pane.

For more information about metadata schemas, see the *EQUELLA Metadata Schema Configuration Guide*.



**Figure 7 Complete Copyright schema**

Searchable nodes are indicated with a  page icon in front of the blue dot. Newly created nodes have  icon while others a  icon. A  node is locked and cannot be changed. Nodes are automatically locked when the schema is used by a collection definition. Locked schemas display a 'Partial locking' message and only allow siblings or attributes to be added to locked nodes.

(NOTE: It is possible to unlock nodes but this is not recommended because existing collection resources are not updated and can exhibit unexpected behaviour.)

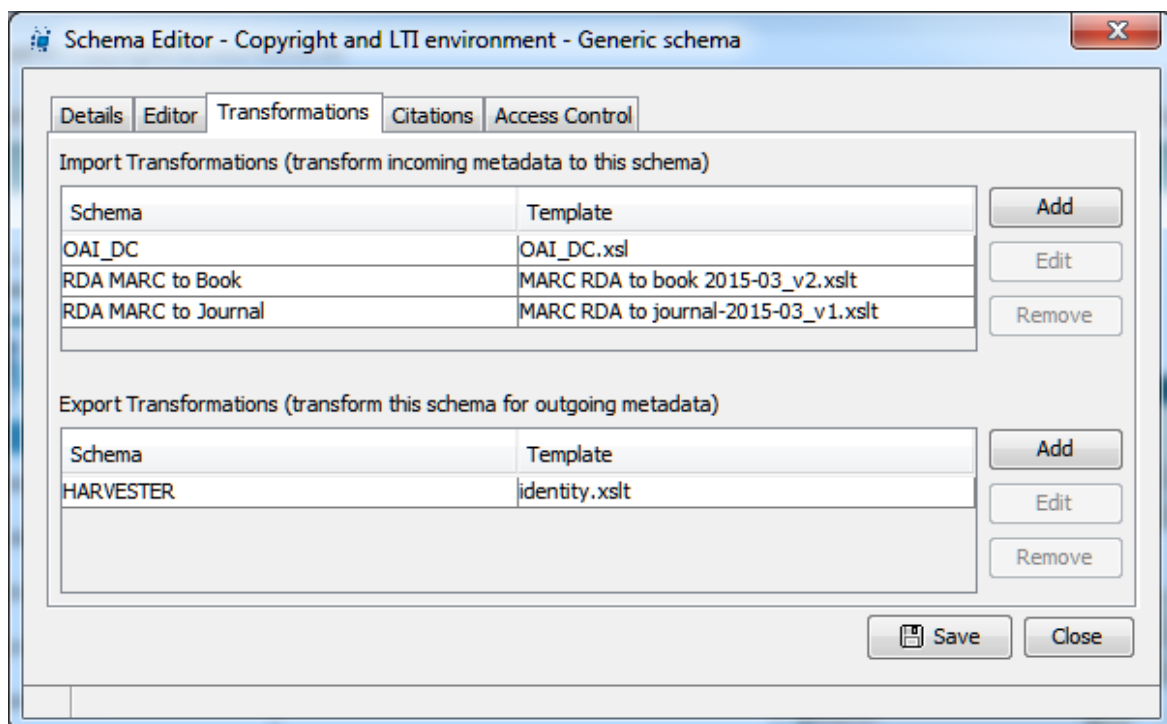
## Transformations tab

Importing an Extensible Stylesheet Language Transformation (XSLT) can transform resource metadata, for example to provide a link between a search and resources in a Parent (holding) collection. Transformations are added in the **Transformations** page. Example import transformations are provided with the *EQUELLA Vanilla Institution*.

### To add an import transformation

1. Select the **Transformations** tab in the **Schema Editor** to display the **Transformations** page.
2. Click  in the **Import Transformations** section to display a **Schema Transformation** dialog.
3. Enter an appropriate name in the **Schema Name** field (e.g. *MARCXML to Book*).
4. Click  to find and open the XSL transformation file (e.g. *marcxml\_to\_book.xslt*) then click the  button.

An example **Transformations** page is shown in Figure 8.



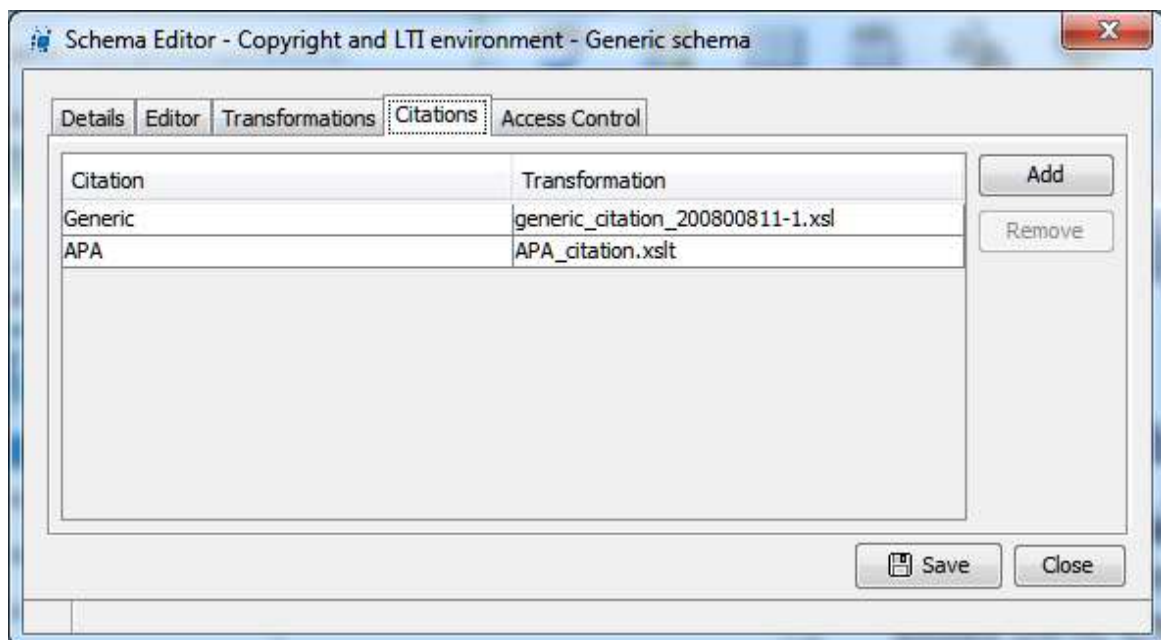
**Figure 8 Transformation page—example import transformations**

## Citations tab

When citing licensed material and institution-preferred style can be selected to display in the LMS. Citations can be configured in the **Citations** page. Various citation styles can be added (*APA, Chicago, Harvard, etc.*) for use with resources associated with the schema (by a collection using the schema). The citation information is gathered from the schema metadata and transformed into the appropriate format by an XSLT. Example generic citation styles are provided with the *EQUELLA Vanilla Institution*.

### To add a citation

1. Select the **Citations** tab in the **Schema Editor** to display the **Citations** page.
2. Click .
3. Click in the blank **Citation** field to display a drop-down menu of available citation styles.
4. Select the required citation or enter a citation name (e.g. *Generic*).
5. Click in the blank **Transformation** field to display a browse dialog enabling selection of an XSLT file (e.g. *generic\_citation.xsl*). An example is shown in Figure 9.



**Figure 9 Citations page—example citations**

## Access Control tab

Schema collaborators (users that can perform various operations on a schema) are managed with the **Access Control** page. Collaborators can be selected individually, as groups or by role to be granted permissions to perform actions on the schema. Further information on managing privileges is provided in the *EQUELLA Security Guide*.

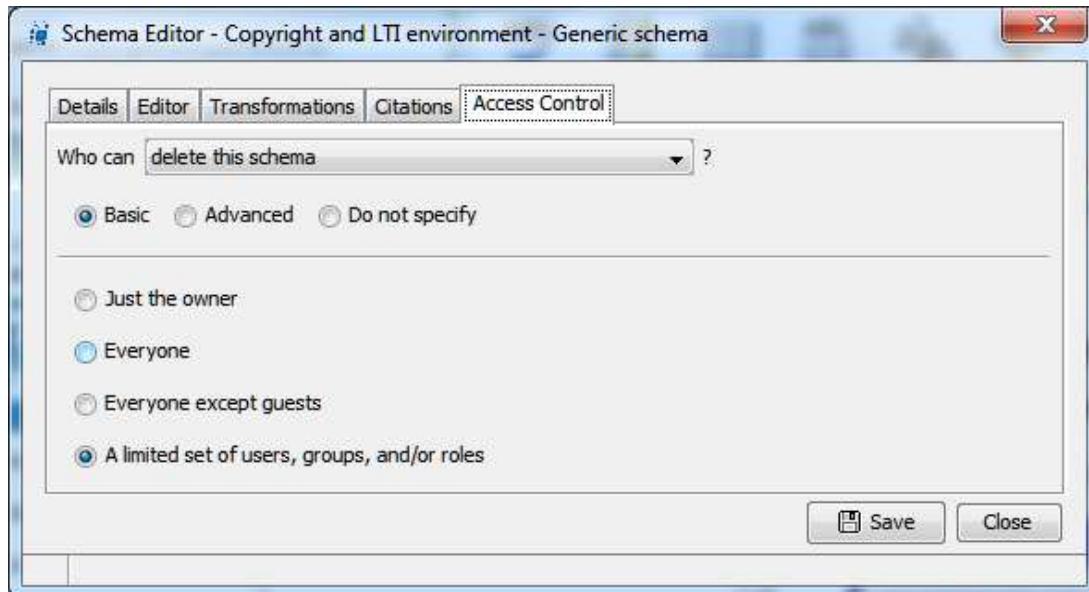
The schema privileges include:

- **CREATE\_SCHEMA** = create a schema
- **DELETE\_SCHEMA** = delete this schema

- **EDIT\_SCHEMA** = edit this schema

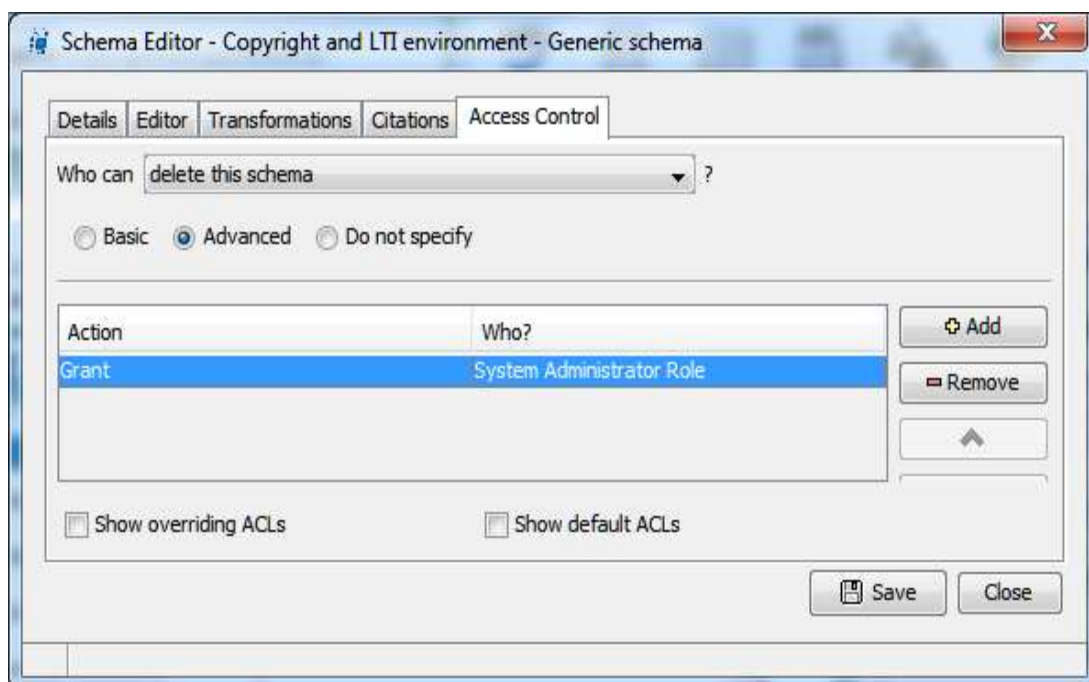
These privileges are typically granted to Administrators.

An example is shown in Figure and 11.



**Figure 8 Access Control tab showing the information displayed by the Basic radio button**



By clicking the **Advanced** radio button the details of the *limited set of users, groups, and/or roles* is displayed....



**Figure 11 Access Control tab**



## Save the schema settings

1. Click  to save the configuration details.
2. Click  to close the Schema Editor.

# Collection definitions

Collection Definitions (collections) associate important information (metadata) and processes with uploaded files or external web sites, and in the case of the eReserve Collection, with a resource in either the Book or the Journal parent (holding) collection as appropriate for the particular e-reading. EQUELLA Contribution Wizards gather this information during the contribution process to create a repository resource.

EQUELLA copyright compliance requires the creation of parent (holding) resources in the Books or Journals collections and portion resources (extracts, chapters, articles, etc.) in the eReserve Collection. Parent (holding) resources contain information about the resource such as book or journal details and the portion resources contain the copyright content such as the scanned chapter of a book or article from a journal. Parent (holding) resources are contributed to parent (holding) collections and portion resources to a portion collection. During the portion contribution process contributors must link the portion resource to the relevant parent (holding) resource.

Parent (holding) collections are used to easily differentiate the types of copyright content and these are typically a book collection and a journal collection. EQUELLA places no limit on the number of collections with the number being dictated by the reporting granularity.

EQUELLA provides copyright compliant collections with the *EQUELLA Vanilla Institution* and they provide a starting point for creating custom collections that closely fit the institution's purpose. The examples in this section are based on two Parent (holding) collections called *Books* and *Journals* and a portion collection called *eReserve articles*.

---

## Create collection definitions

Creating a collection definition requires that the metadata schema has been defined. Further information is provided in the [Create a copyright schema](#) section on page 8.


The Collection Definition Editor allows the entry of general collection information such as name, description and wizard category. Much of this information is displayed to the user when contributing resources, enabling them to select a suitable collection for their contribution. An example is shown in Figure 9 and 11.

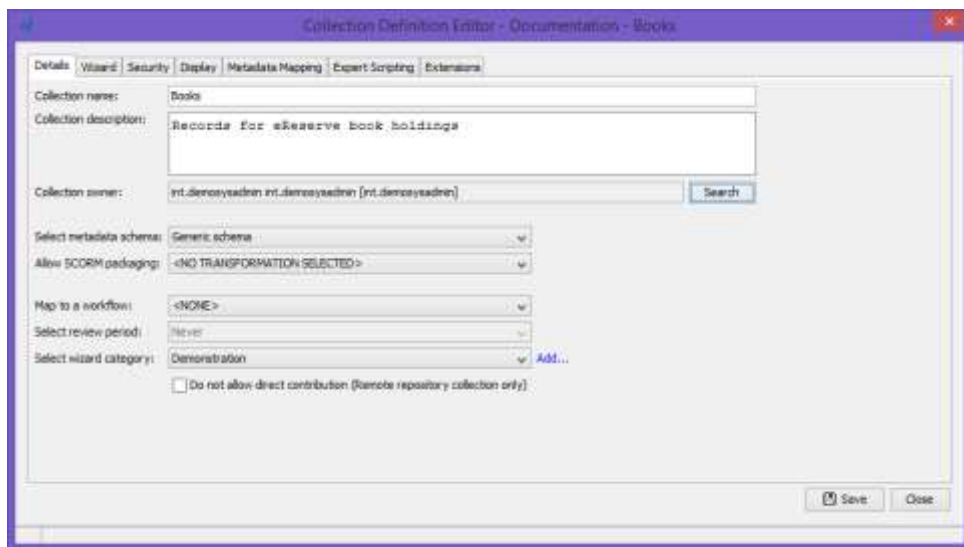


**Figure 9 Contributor's view of the copyright collections options**

Collections are created and modified using the **Collection Definitions** tool available in the **Administration Console**. Further information on collections is provided in the *EQUELLA Collection Definitions Configuration Guide*.

### To create a collection

1. Select **Collection Definitions** from the Administration Console.
2. Click  **Add** to display the **Collection Definition Editor**. An example is shown in Figure 10.



**Figure 10 Collection definition editor**

The Collection Definition Editor provides an interface for collection creation. The following tabs are described in this section:

- **Details**—provides general information for the collection, association of a metadata schema and workflow template.
- **Wizard**—creates a wizard to gather the metadata about the resource.
- **Extensions**—configures copyright licensing compliance, activation options and customised error messages and agreements.

The following tabs are not described in this section; please refer to the *EQUELLA Collection Definitions Configuration Guide* for more information.

- **Security**—controls access to a collection and its wizard, resources and metadata.
- **Display**—contains the various templates for displaying a collection resource's metadata.
- **Metadata Mapping**—enables the mapping of metadata from uploaded resources to collection schema fields.
- **Expert Scripting**—enables the addition of scripts that can be run at particular points in the resource's lifecycle.

## Copyright compliant collections

EQUELLA copyright compliance features typically require users to create separate collections for Parent (holding) resources (books, journals, etc.) and portion resources (extracts, chapters, articles, etc.).

EQUELLA copyright compliant collections do not restrict the amount of resources that can be stored in the repository but do restrict the number of portion resources that can be viewed by course users. The following restrictions are applied:

- **For books**—usually 10% (this percentage is configurable) or one chapter, whichever is the greater.
- **For journals**—one article or multiple articles with the same topic.

To initiate the activation rules the portion resources must be linked to a relevant parent (holding) resource during the portion resource contribution process.

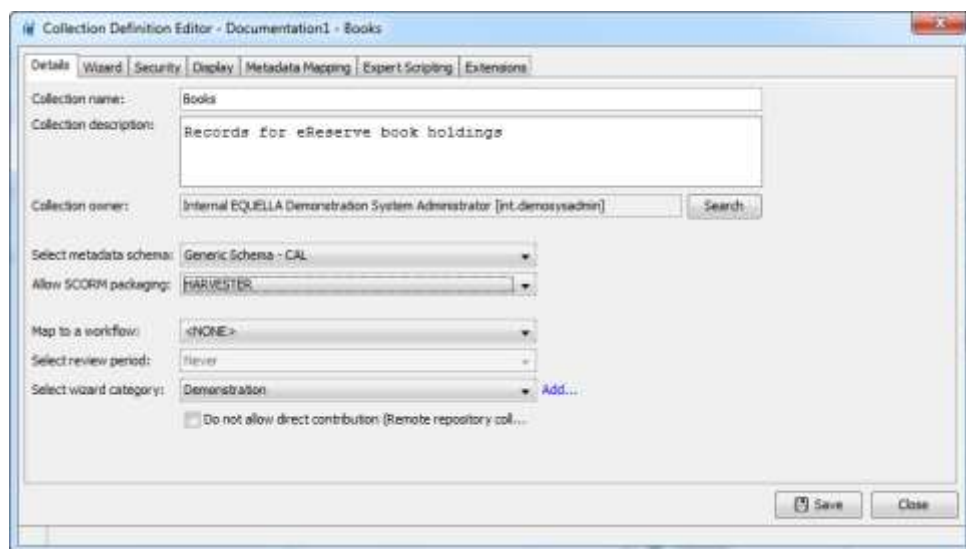
Copyright compliance collection creation typically includes the following steps:

1. Create a Parent (holding) collection (e.g. *Books*).
2. Create another Parent (holding) collection (e.g. *Journals*).
3. Create a portion collection (e.g. *eReserve articles*) for extracts such as book chapters and journal articles.

The first step is to create a Parent (holding) collection.


## Create a Parent (holding) collection

The Parent (holding) collection created in this section using the **Collections Definition Editor** is called *Books*.



**Figure 14 Collection Definition Editor Details page—example Books collection**

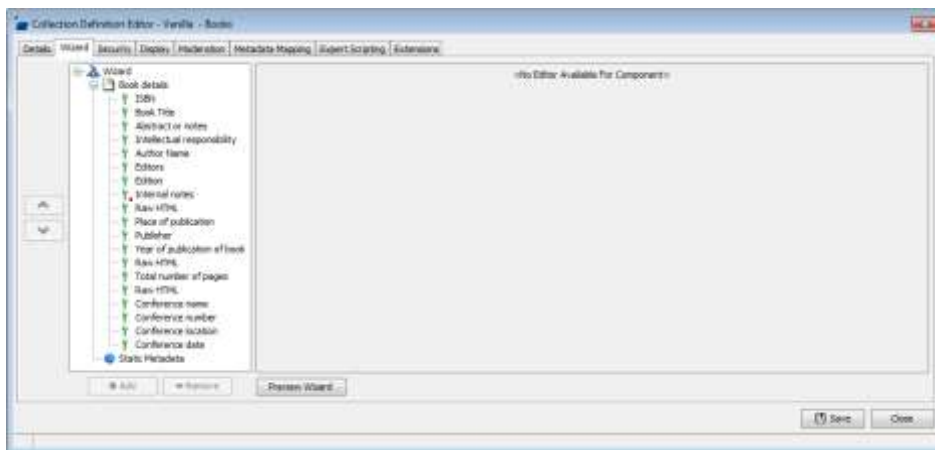
### To add the collection definition details

1. Enter the following in the **Details** page. An example is shown in Figure 14:
  - a. **Collection name**—enter a unique display name for the collection (e.g. *Books*). Collection details are displayed to users on the **Contribute** page in the EQUILLA Digital Repository. An example is shown in Figure 9.
  - b. **Collection description**—enter a description for this collection. This description is displayed to help contributors choose a collection during the contribution process.
  - c. **Collection owner**—defaults to the current user. To change click  then browse and select a new owner.
  - d. **Select metadata schema**—select a metadata schema from the drop-down list (e.g. *Generic Schema*).
  - e. **Allow SCORM Packaging**—select from the drop-down list to allow resources in the collection to be downloaded as a SCORM-compliant package.

- f. **Map to a workflow**—select from the drop-down list to allow resources in this collection to automatically enter the selected workflow.
- g. **Select review period**— select from the drop-down list to allow the period between moderation reviews to be set to ensure the resource remains current. This option is only available for collections that have an associated workflow.
- h. **Select wizard category**— select a category from the drop-down list to allow a means for grouping collection definitions. Categories are displayed on the user contribution page in the EQUELLA Digital Repository. An example is shown in Figure 9. Select a wizard category (e.g. *Demonstration*) from the list. If there is no suitable category, new ones can be created by clicking the **Add...** link.

### To create a collection definition wizard

The **Wizard** page enables the construction of a Contribution Wizard. The completed example *Books Contribution Wizard* is shown in Figure .



**Figure 15 Wizard page—example Books Contribution Wizard**

Contribution Wizards are used to assist contributors in providing the details appropriate for the contributed resources. The wizard is displayed when the collection is selected from the **Contribute** page the EQUELLA Digital Repository. A *Journals* example is shown in Figure 11.

The screenshot displays the 'Journals' section of the EQUELLA interface. The main area is titled 'Journal issue details' and contains several input fields: 'Title' (with a 'Go' button), 'Abstract or notes', 'Internal notes' (with a note about being viewable only to content administrators), 'Editor(s)', and 'Place of publication'. A sidebar on the left has a vertical menu of icons. On the right, there are 'Save' and 'Cancel' buttons, along with a 'Journal issue details' link.

**Figure 11 User's view of the Journals Collection Contribution Wizard**

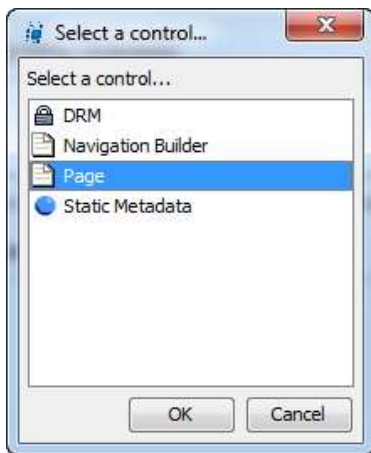
### To add the wizard controls

1. Select the **Wizard** tab in the Collection Definition Editor to display the Wizard page. An example is shown in Figure 12 .


The screenshot shows the 'Collection Definition Editor - Copyright and LTI environment - Journals' window. The 'Wizard' tab is selected, and the 'Wizard' section is active. It contains two checkboxes: 'Allow non-sequential page navigation for new resources' and 'Show page titles on Next/Prev buttons'. Below these is a 'CSS Class' field with a description: 'This field allows you to add additional CSS classes to the entire wizard.' There is also an 'Accessibility Help' section with text about designing accessible forms. At the bottom, there are 'Add', 'Remove', 'Save', and 'Close' buttons.

**Figure 12 Collection Definition Editor—Wizard page**

2. Click  to display the **Select a control...** dialog, an example is shown in Figure




**Figure 18 Select a Control... dialog**

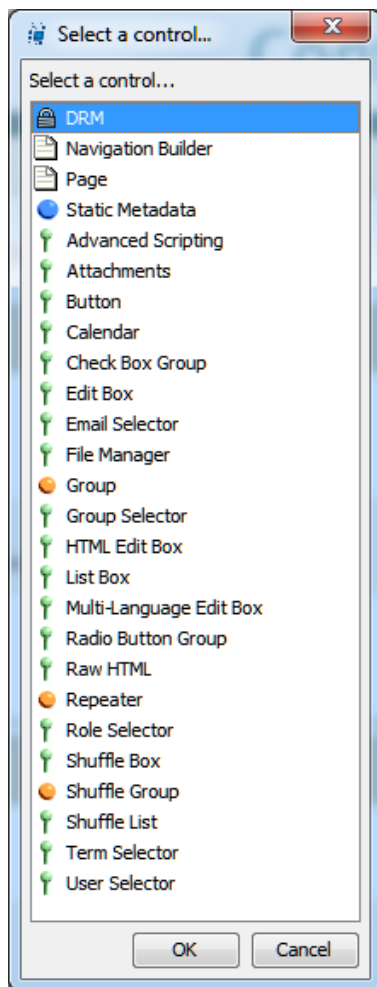
3. Select a **Page** control from the list then click  to display the new page as a child node of the *Wizard* node.
4. Enter the **Title** (e.g. *Book details*) in the Control Editor pane. This name is displayed to users on the corresponding wizard tab or sidebar list.

Other controls can be added to this wizard page. Further information on wizard controls is provided in the *EQUELLA Wizard Controls Reference Guide*.

### To add controls to a page

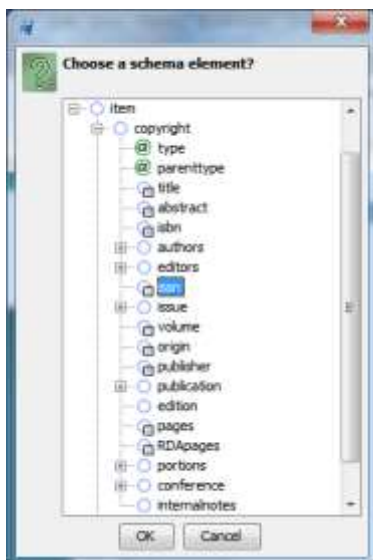
1. Select the page control (e.g. *Book details*) in the Hierarchy pane.
2. Click  to display the **Select a control...** dialog. An example is shown in Figure 1319.





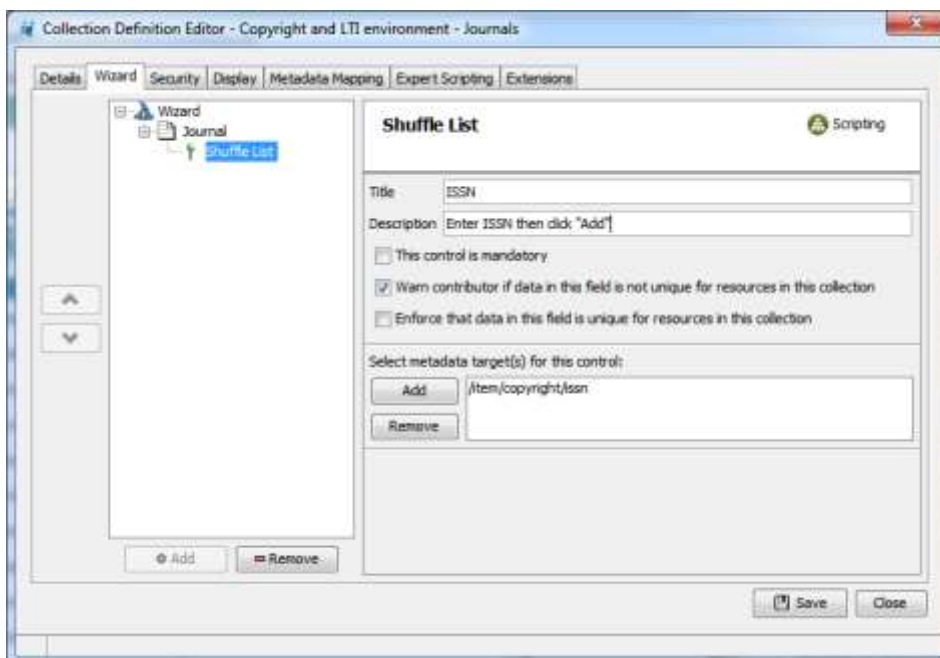
**Figure 13 Select a Control... dialog**

3. Select a **Shuffle List** control then click  to display the control in the hierarchy pane. This control allows users to add any number of elements to a list.
4. Enter the **Title** (e.g. *ISBN*).
5. Enter a **Description** (e.g. *Enter ISBN then click 'Add'*). When a title is self-explanatory the description is not required.
6. Check the **Warn the contributor if data in this field is not unique for resources in this collection** checkbox. (*NOTE: The schema element must also be indexed for advanced searching.*)
7. Click  in the **Select metadata target(s) for this control:** section to display the **Choose a Schema element?** dialog, an example is shown in Figure 140.
8. Click the **+** symbols to expand the tree.



**Figure 14 Choose a schema element? dialog**

9. Select the schema element (e.g. *item/copyright/issn*) then click to display the selected schema element in the **Select metadata target(s) for this control:** section. An example is shown in Figure 150.



**Figure 15 Wizard page—example shuffle list control**

10. Select the **Page** control (e.g. *Journal Details*).
- When adding the following controls, leave the default values unless stated.
11. Click then select an **Edit Box** control and enter the following:
- Title**—(e.g. *Journal Title*).
  - Description**—(e.g. Include the full title of the journal).


- c. **This control is mandatory**—check the box. This means that the user must add information for this control during the resource contribution process.
- d. Warn the contributor if data in this field is not unique for resources in this collection—check the box. (*NOTE: The schema element must also be indexed for advanced searching.*)
- e. **Select metadata target(s) for this control**—(e.g. *item/copyright/title* and *lom/general/title*).

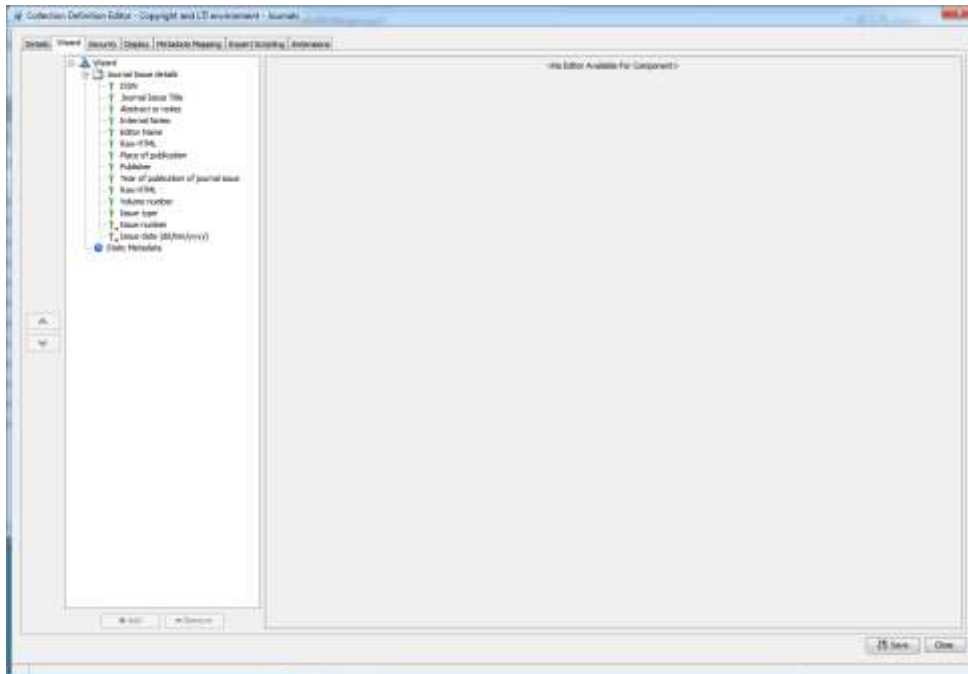
**Note:** as, well as the copyright title field appropriate to the collection, the control must also include the default schema node used for a resource's title as defined on the schema *Details* tab as the **Resource Name Path**. If this is not set then the resource's uuid will display instead of the title.

12. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Abstract or notes).
  - b. Number of rows—(e.g. 5).
  - c. **Select metadata target(s) for this control**—(e.g. *item/copyright/abstract* and *item/itembody/description*).
13. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Intellectual responsibility).
  - b. **Description**—(e.g. Statement of author and other roles such as editor, translator etc.).
  - c. Number of rows—(e.g. 2).
  - d. Select metadata target(s) for this control—(e.g. *item/copyright/responsibility*).
14. Add a **Shuffle List** control then enter the following:
  - a. **Title**—(e.g. *Author Name*).
  - b. **Description**—(e.g. Enter the author(s) of this book (Surname, Given) then click "Add").
  - c. Select metadata target(s) for this control—(e.g. *item/copyright/authors/author*).
15. Add a **Shuffle List** control then enter the following:
  - a. **Title**—(e.g. *Editors*).
  - b. **Description**—(e.g. Enter the editor(s) of this book (Surname, Given) then click "Add").
  - c. Select metadata target(s) for this control—(e.g. *item/copyright/editors/editor*).
16. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. *Edition*).
  - b. **Description**—(e.g. *for example 4<sup>th</sup> ed.*).
  - c. Select metadata target(s) for this control—(e.g. *item/copyright/edition*).
17. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. *Internal notes*).
  - b. **Description**—(e.g. Bibliographic and other details viewable only by content administrators).
  - c. Number of rows—(e.g. 2).
  - d. Select metadata target(s) for this control—(e.g. *item/copyright/internalnotes*).

- e. **Scripting**—(e.g. *if Issue type = 'number'*). Further information on scripting is provided in the [To add a script](#) section on page 28.

The completed *Issue number* control example is shown in Figure 16.

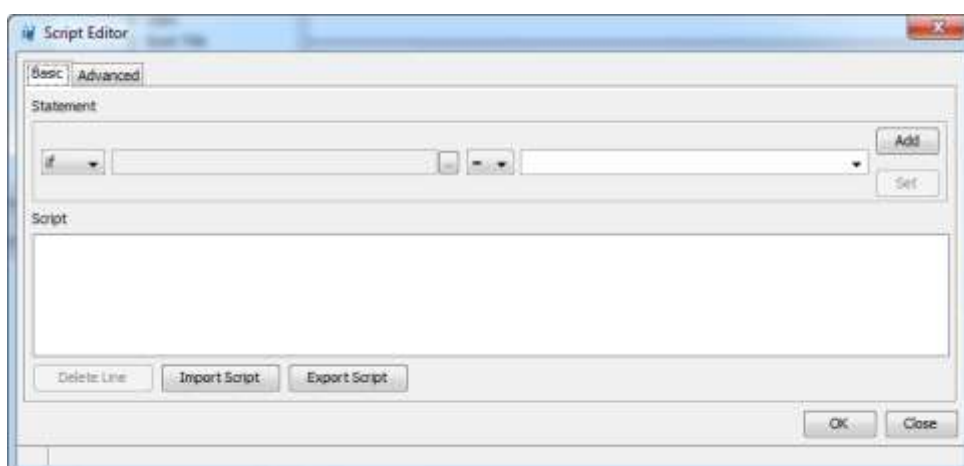
NOTE: The red dot  next to the Editors control in Figure 22 indicates that the control has an associated script, which displays the control only if certain other conditions set in a previous control in the wizard, are 'true'.



**Figure 16 Wizard page—example Edit Box and calendar controls with scripts**

### To add a script

1. Click  **Scripting** to display the **Script Editor** shown in Figure 17.

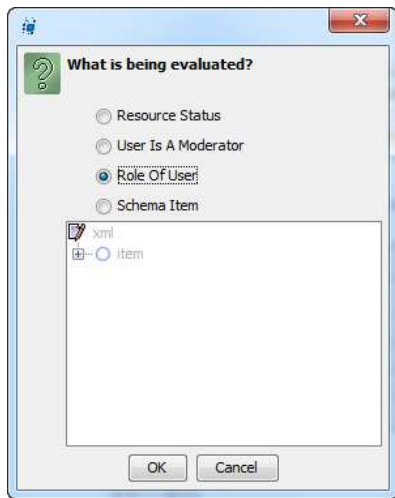


**Figure 17 Script Editor dialog**

All wizard control scripts must start with 'if'

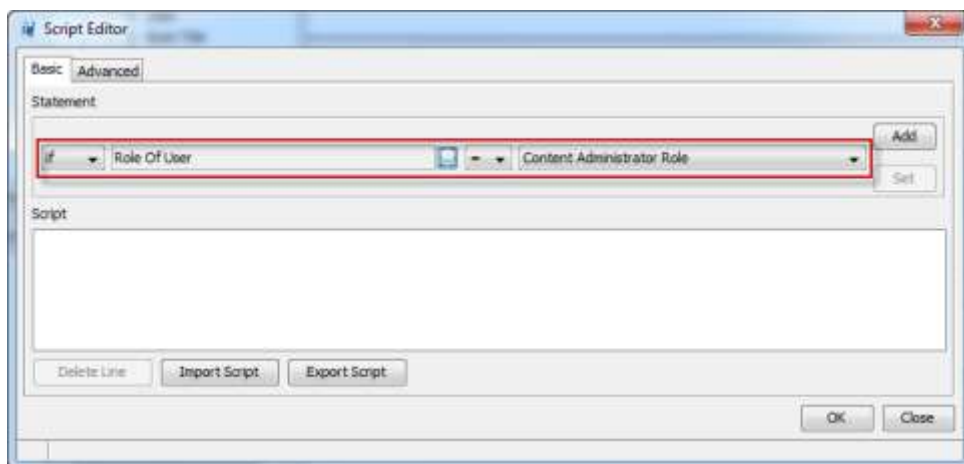
2. Click the  button to display the **What is being evaluated?** dialog.

3. Select the radio button option (e.g. *Role of User*). An example is shown in Figure 18.



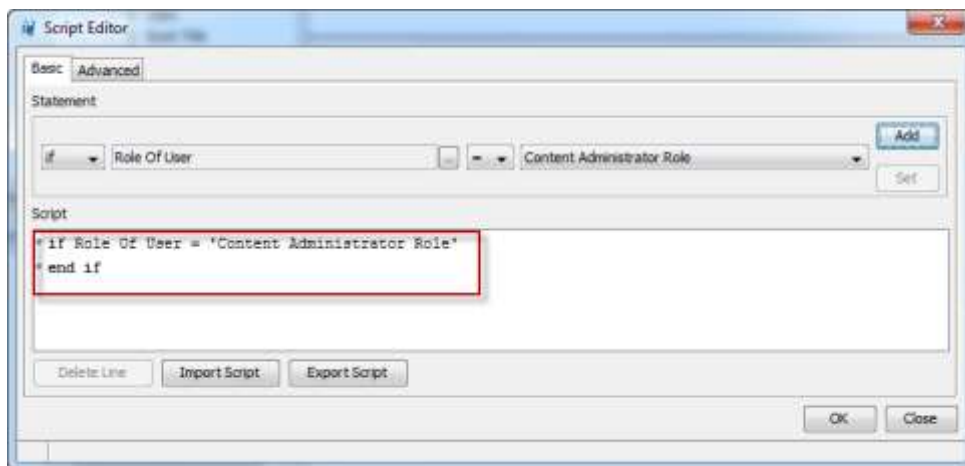
**Figure 18 What is being evaluated? dialog**

4. Click **OK** to add the selected option as the test term.
5. Select an option from the relational operator drop-down list (e.g. =).
6. Select the test value from the drop-down list (e.g. *Content Administrator Role*), an example is shown in Figure 19. (NOTE: A test value can be entered for test terms with a selected schema node.)



**Figure 19 Script Editor—example statement**

7. Click **Add** to display the script in the **Script** area. An example is shown in Figure 206. The 'end if' has been automatically added by the script editor.



**Figure 20 Script Editor—example script**

8. Click  to save and close the Script Editor. Further information on scripting is provided in the *EQUELLA Scripting Guide (Basic)*.

### To add further controls






1. Add a **Raw HTML** control then enter the following:
  - a. User Defined HTML—(e.g. `<hr>`).
2. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Place of Publication).
  - b. Select metadata target(s) for this control—(e.g. `item/copyright/publication/place`).
3. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. *Publisher*).
  - b. Select metadata target(s) for this control—(e.g. `item/copyright/publisher`).
4. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Year of publication of book).
  - b. Select metadata target(s) for this control—(e.g. `item/copyright/publication/year`).
5. Add a **Raw HTML** control then enter the following:
  - a. User Defined HTML—(e.g. `<hr>`).
6. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Total number of pages).
  - b. This control is mandatory—check the box.
  - c. Select metadata target(s) for this control—(e.g. `item/copyright/pages`).
7. Add a **Raw HTML** control then the following:
  - a. User Defined HTML—(e.g. `<hr>`).
8. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Conference name).
  - b. Select metadata target(s) for this control—(e.g. `item/copyright/conference/name`).
9. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Conference number).

- b. Select metadata target(s) for this control—(e.g. *item/copyright/conference/number*).
10. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Conference location).
  - b. **Select metadata target(s) for this control**—(e.g. *item/copyright/conference/location*).
11. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Conference date).
  - b. Select metadata target(s) for this control—(e.g. *item/copyright/conference/year*).

## ***Incorporate a Static Metadata control***

The **Static Metadata** control is used to store metadata that is fixed for all resources of a collection, for example the name of a faculty or school that remains the same across the entire collection.

### To add a Static Metadata control

1. Select the **Page** control (e.g. *Book details*).
2. Click  to display the **Select a control...** dialog.
3. Select a **Static Metadata** control then click  to display the control in the Hierarchy pane.
4. Click  in the **Metadata target** section to display the **Choose a schema element?** dialog.
5. Click the **+** symbol to expand the tree.
6. Select the node (e.g. *@type*) then click .
7. Enter a **Metadata Value** (e.g. *Book*).
8. Click  to add the metadata value to the metadata target and display the associated list. An example *Static Metadata* control is shown in Figure 21.

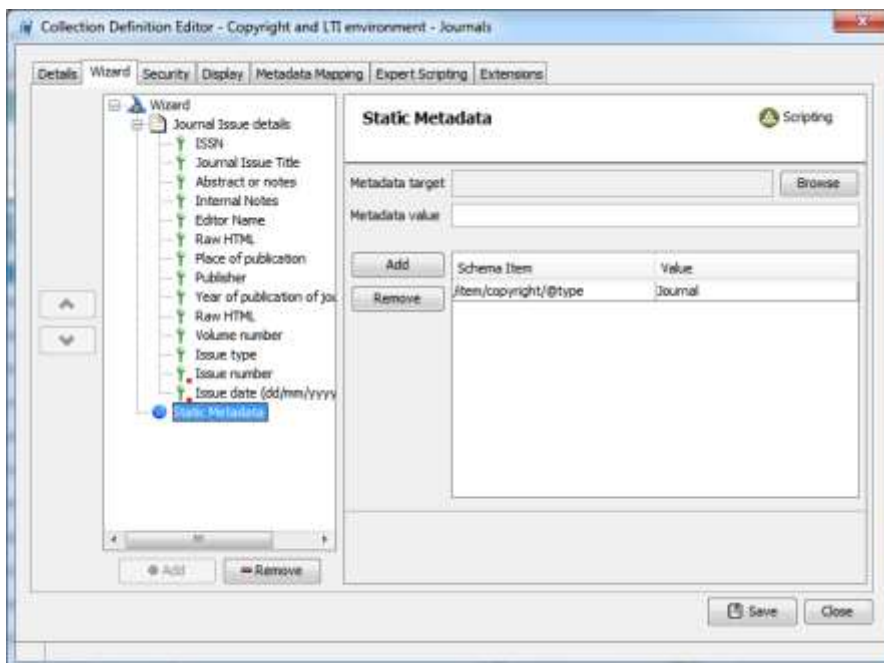


Figure 21 Wizard page—example Static Metadata control

## *Incorporate Copyright licensing extensions*

Copyright compliant collection definitions are simple to configure and the copyright usage data is automatically recorded. To create a copyright compliant collection definition, the Copyright **Licensing** checkbox must be selected on the **Extensions** page in the **Collection Definition Editor**.

### To incorporate Copyright licensing

1. Select the Extensions tab in the Collection Definitions Editor to display the Extensions page.
2. Check the Copyright **Licensing** checkbox, an example is shown in Figure 22.



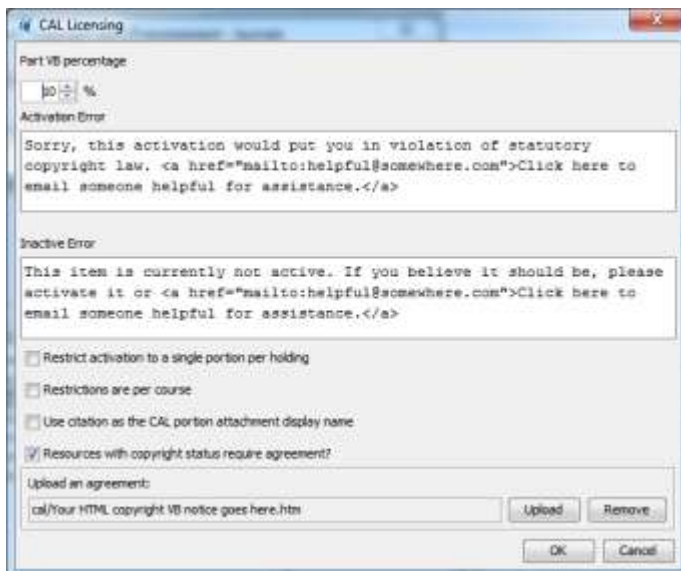
Figure 22 Extensions page—CAL licensing enabled. Add error or agreement messages

Customised activation error or inactive messages and licence text for display to users can also be added to the Parent (holding) collection.

1. Click **Configure** to display the Copyright **Licensing** dialog.



2. Enter error messages in the **Activation Error** and **Inactive Error** panes respectively. An example is shown in Figure 23



**Figure 23 Configuration of Copyright licensing error messages and agreement**

The **Activation Error** message is displayed when a user attempts to activate a portion resource such as a book extract when it is in violation of the Copyright copyright rules - if for example, it is more than 10% of the book.

**Note** that the percentage can be varied in the configuration. If the contributor has sufficient permissions they will be able to exceed the value set in the Licensing configuration, but must add in a mandatory explanation why they have exceeded the percentage value.

The **Inactive Error** message is displayed when a user attempts to access a portion resource such as a journal article that is not activated. If the user has sufficient privileges, they will be able to activate the resource themselves.

## ***Restrict activations***

The default activation restrictions can be overridden by administrators with options to restrict activation to a single portion resource per Parent (holding) resource and apply the activations per course rather than institution wide.

### **To restrict activation to a single portion per Parent (holding) resource**

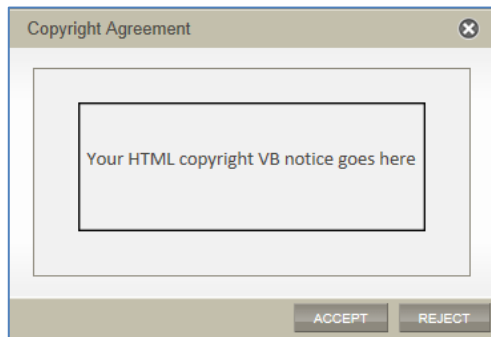
1. Select the **Restrict activation to a single portion per holding** (i.e. parent resource) checkbox.

### **To restrict activations per course**

1. Select the **Restrictions are per course** checkbox.

## Copyright status agreement

An agreement can be uploaded that is displayed to users who must accept the agreement terms before they can view an activated portion resource. An example is shown in Figure 24.




**Figure 24 User's view of a copyright agreement**

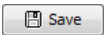
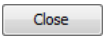
### To add a copyright status agreement

1. Check the **Resources with copyright status require agreement?** checkbox.
2. Click the **Upload** button and upload the agreement (in HTML format) from the local computer or network.

### To save the licensing settings

1. Click  to save the details and close the Copyright Licensing dialog.

## Save the collection definition settings

1. Click  to save the configuration details.
2. Click  to close the Collection Definition Editor.




The copyright compliant *Books* Parent (holding) collection is now complete. The example wizard shown in Figure 11 is displayed to contributors in the EQUELLA Digital Repository when the *Books* collection definition is selected.


The next step is to create a Parent (holding) collection for journals.

## Create another Parent (holding) collection

The Parent (holding) collection created in this section using the **Collections Definition Editor** is called *Journals*. The *Books* collection has similar controls so the *Journals* collection will be created by cloning and editing the *Books* collection.

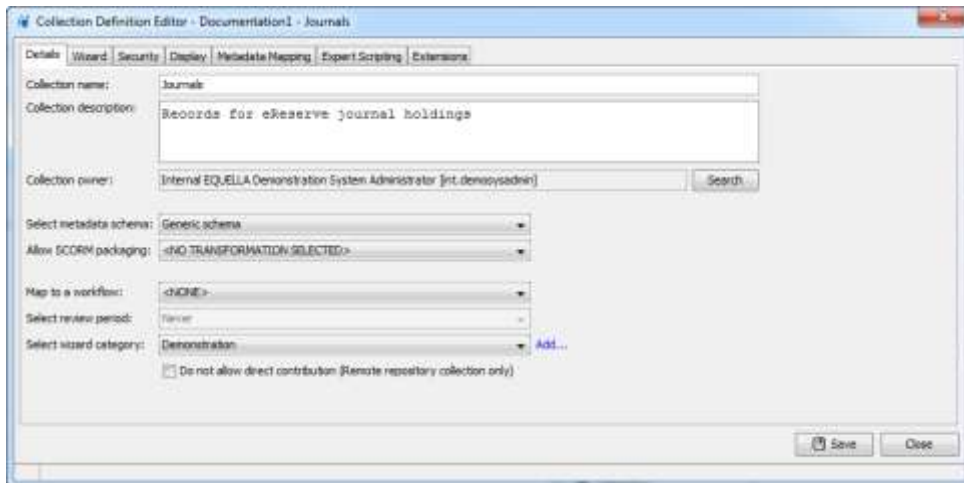
### To create the *Journals* Parent (holding) collection

1. Select **Collection Definitions** in the Administration Console then collection.
2. Click  to display the **Clone?** dialog.
3. Click  to confirm then click  to add a new collection (e.g. *Copy of Books*) to the Collection Definitions list.

4. Select the collection (e.g. *Copy of Books*) then click  **Edit** to display the **Collection Definition Editor**.

### To edit the collection definition details

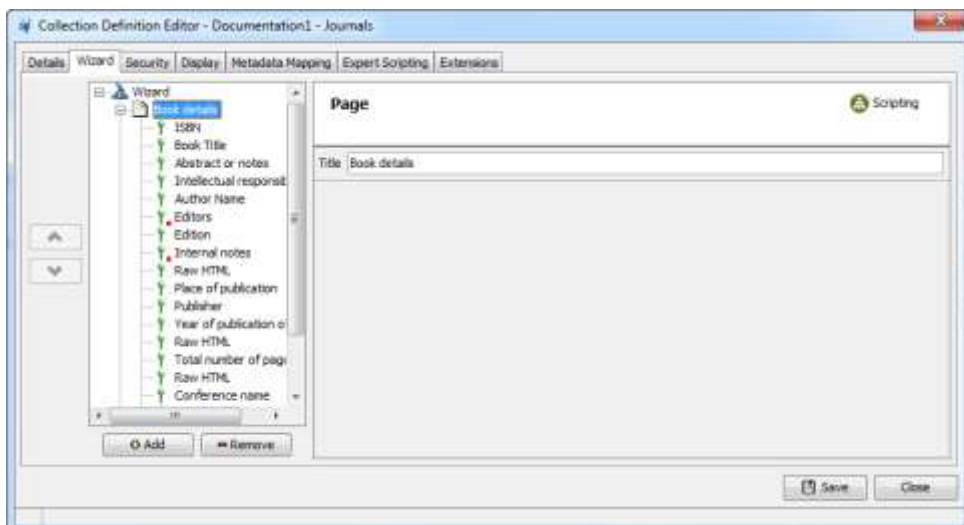
1. Enter appropriate information in the **Details** page. An example is shown in Figure 25.
  - a. **Collection name**—enter a unique name for the collection (e.g. *Journals*).
  - b. **Collection description**—enter a brief description for this collection.



**Figure 25 Collection Definition Editor Details page—Journals collection**

### To edit a collection definition wizard

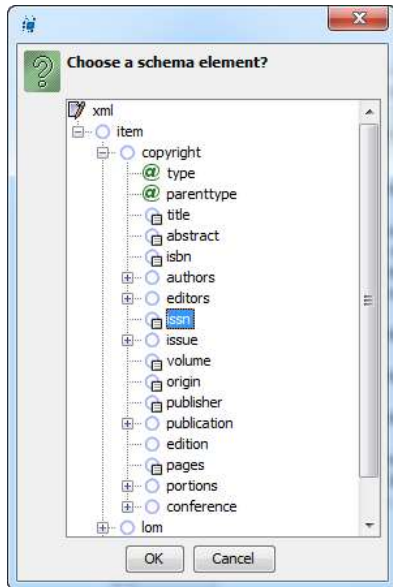
1. Select the **Wizard** tab to display the **Wizard** editor page.
2. Select the page control (e.g. *Book details*) in the Hierarchy pane to display the control editor pane. An example is shown in Figure 26.



**Figure 26 Editor Wizard page—example Page control**










3. Edit the **Title** (e.g. *Journal Issue details*).
4. Select the next control (e.g. *ISBN*).
5. Edit the **Title** (e.g. *ISSN*).

6. Edit the **Description** (e.g. *Enter ISSN then click 'Add'*). When a title is self-explanatory the description is not required.
7. Select the target in the **Select metadata target(s) for this control:** section (e.g. *item/copyright/issn*) then click .
8. Click  to display the **Choose a Schema element?** dialog.
9. Click the **+** symbols to expand the tree, an example is shown in Figure 27.

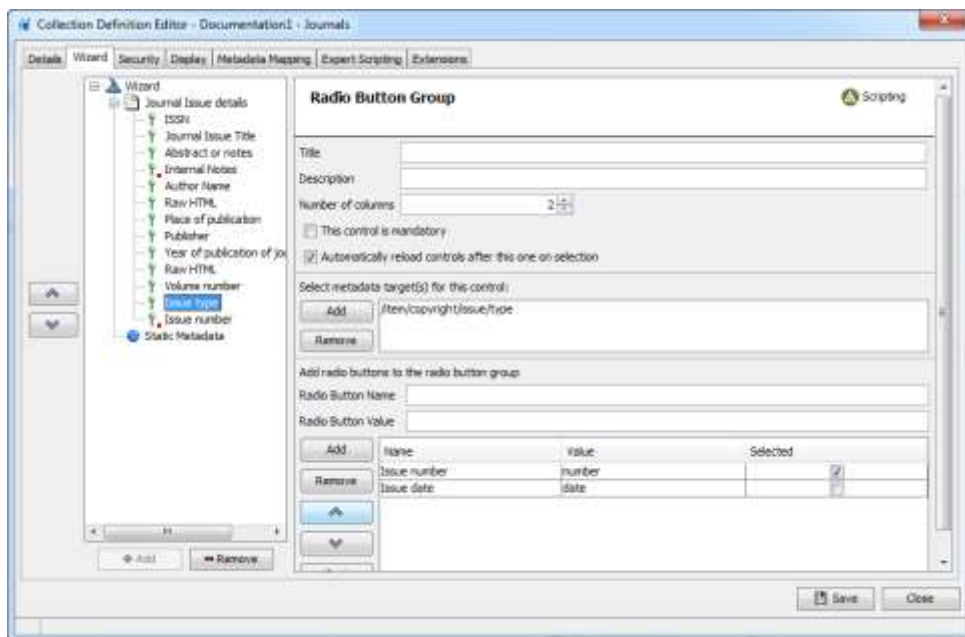


**Figure 27 Choose a schema element? dialog**

10. Select the schema element (e.g. *item/copyright/issn*) then click  to display the selected schema element in the **Select metadata target(s) for this control:** section.
11. Select the (e.g. *Book Title*) control then edit the following:
  - a. **Title**—(e.g. Journal Issue Title).
  - b. **Description**—(e.g. Include the full journal title).
12. Leave the (e.g. *Abstract or notes*) control unchanged.
13. Select the (e.g. *Intellectual responsibility*) control.
14. Click  to display the **Remove Wizard Control?** dialog then click  to confirm.
15. Leave the (e.g. *Author Name*) control unchanged.
16. Click the  button to move the (e.g. *Author Name*) control below the (e.g. *Internal Notes*) control.
17. Remove the (e.g. *Editors*) control.
18. Remove the (e.g. *Edition*) control.
19. Leave the (e.g. *Internal Notes*) control unchanged.
20. Leave the (e.g. *Raw HTML*) control unchanged.
21. Leave the (e.g. *Place of publication*) control unchanged.
22. Leave the (e.g. *Publisher*) control unchanged.
23. Select the (e.g. *Year of publication of book*) control then edit the following:

- a. **Title**—(e.g. Year of publication of journal issue).
- 24. Leave the (e.g. *Raw HTML*) control unchanged.
- 25. Remove the (e.g. *Total number of pages*) control.
- 26. Remove the (e.g. *Raw HTML*) control.
- 27. Remove the (e.g. *Conference name*) control.
- 28. Select the (e.g. *Conference number*) control then edit the following:
  - a. **Title**—(e.g. *Volume number*).
- 29. Select the target in the **Select metadata target(s) for this control:** section (e.g. *item/copyright/conference/number*) then click .
- 30. Click  to display the **Choose a Schema element?** dialog.
- 31. Select the schema element (e.g. *item/copyright/volume*) then click  to display the selected schema element in the **Select metadata target(s) for this control:** section.
- 32. Select the (e.g. *Conference location*) control then edit the following:
  - a. **Title**—(e.g. *Issue number*).
  - b. **Description**—(e.g. Issue/Part number, month or season e.g. 3, 1-2, Oct, Mar/Apr or Summer).
  - c. Select metadata target(s) for this control:— (e.g. *item/copyright/issue/value*).
  - d. **Scripting**—(e.g. *if /item/copyright/issue/type != 'date'*). Further information on scripting is provided in the [To add a script](#) section on page 28.
- 33. Remove the (e.g. *Conference date*) control.
- 34. Select the page control (e.g. *Journal Issue details*) in the Hierarchy pane.
- 35. Click  to display the **Select a control...** dialog.
- 36. Select a **Radio Button Group** control then click  to display the control in the Hierarchy pane. This control allows users to select one element from a group.
  - a. Enter the **Title** (e.g. *Issue type*).
  - b. Enter the **Number of columns** (e.g. 2).
  - c. Enter the **Percentage spacing** (e.g. 50).
  - d. Check the Automatically refresh page on selection checkbox.
  - e. Click  in the **Select metadata target(s) for this control:** section to display the Choose a Schema element? dialog.
  - f. Select the schema element (e.g. *item/copyright/issue/type*) then click  to display the selected schema element in the **Select metadata target(s) for this control:** section.
  - g. Enter the **Radio Button Name** to be displayed next to the radio button (e.g. *Issue number*).
  - h. Enter the **Radio Button Value** to be stored in the metadata target and to make it easily identifiable for an associated script (e.g. *number*).
  - i. Click  to add radio button names and values to the list.
  - j. Check the **Selected** checkbox to set as the default radio button.
  - k. Add an extra name (e.g. *Issue date*) and value (e.g. *date*) to the list.
- 37. Click the  button to move the *Issue type* control above the *Issue number* control.

The completed *Issue type* control example is shown in Figure 29.



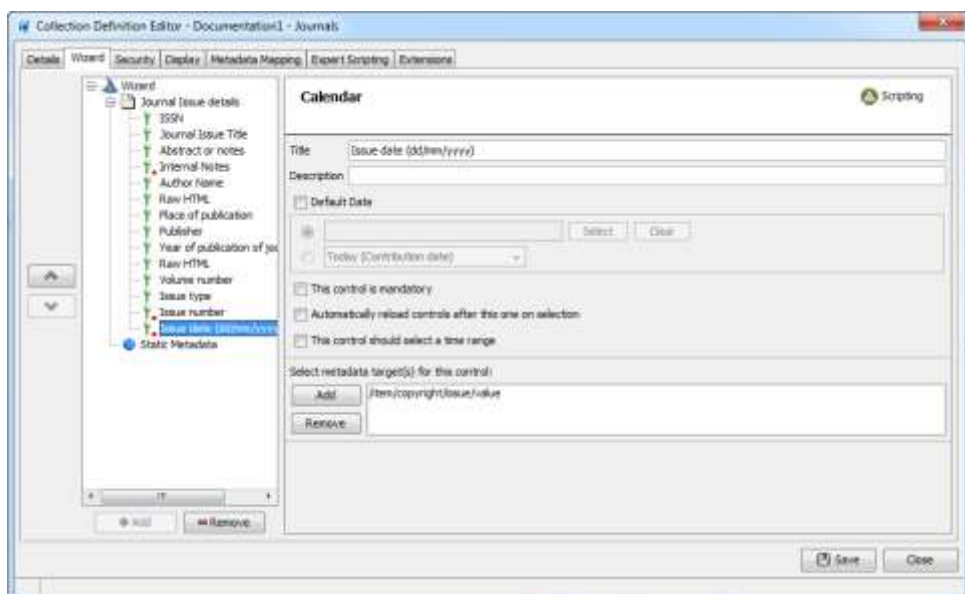
**Figure 28 Wizard page—example Radio Button Group control**

38. Select the page control (e.g. *Journal Issue details*) in the Hierarchy pane.

39. Click **Add** to add a **Calendar** control that allows users to select a date then click **OK** and enter the following:

- Title**—(e.g. Issue date (dd/mm/yyyy)).
- Select metadata target(s) for this control—(e.g. *item/copyright/issue/value*).
- Scripting**—(e.g. `if /item/copyright/issue/type = 'date'`).





The completed *Issue date* control example is shown in Figure 29.



**Figure 29 Wizard page—example Calendar control**

40. Select the **Static Metadata** control.



41. Select the **Schema path** (e.g. *item/copyright/@type*) then click .
42. Click  in the **Metadata target** section to display the **Choose a schema element?** dialog.
43. Select the node (e.g. *item/copyright/@type*) then click .
44. Enter a **Metadata value** (e.g. *Journal*).
45. Click  to add the metadata value to the metadata target and display the association list.

## Incorporate Copyright licensing extensions

To create a copyright compliant collection definition, the Copyright **Licensing** checkbox must be selected on the **Extensions** page in the **Collection Definition Editor**.

Refer to the [Incorporate Copyright licensing extensions](#) section on page 32 for more information.

## Add error or agreement messages

Customised activation error or inactive messages and licence text for display to users can also be added to the Parent (holding) collection. Refer to the [Add error or agreement messages](#) section on page 32 for further information.


## Restrict activations

The default activation restrictions can be overridden by administrators with options to restrict activation to a single portion resource per Parent (holding) resource and apply the activations per course rather than institution wide. Refer to the [Restrict activations](#) section on page 33 for further information.



## Copyright status agreement

An agreement can be uploaded that is displayed to users who must accept the agreement terms before they can view an activated portion resource. An example is shown in Figure 24. Refer to the [Copyright status agreement](#) section on page 34 for more information.

### To save the licensing settings

1. Click  to save the details and close the Copyright Licensing dialog.

## Save the collection definition settings

1. Click  to save the configuration details.
2. Click  to close the Collection Definition Editor.

The copyright compliant *Journals* Parent (holding) collection is now complete. The wizard is displayed to contributors in the EQUELLA Digital Repository when the *Journals* collection definition is selected. An example wizard is shown in Figure 30.

The screenshot shows a web browser window displaying the EQUELLA 'Journals' section. The page has a blue header with the EQUELLA logo and 'PEARSON' text. Below the header, there's a navigation bar with 'Journals | EQUELLA' and a user profile section. The main content area is titled 'Journals' and contains a form for 'Journal Issue details'. The form includes several input fields: 'ISSN' with a note 'Enter ISSN then click "Add".'; 'Journal Issue Title' with a note 'Include the full journal title. Do not abbreviate.'; 'Abstract or notes' with a text area; 'Author Name' with a note 'Enter the author(s) of the Journal (Surname, Given ) then click "Add".'; 'Place of publication'; 'Publisher'; 'Year of publication of journal issue' with a note 'Please enter year for this issue'; 'Volume number'; and 'Issue number' with a radio button option for 'Issue date'. A 'Save' button is located at the top right of the form area, and a 'Cancel' button is at the bottom right. A sidebar on the left contains various icons for navigation.


**Figure 30 User's view of the collection definition wizard—Journals**

The next step is to create a portion collection.

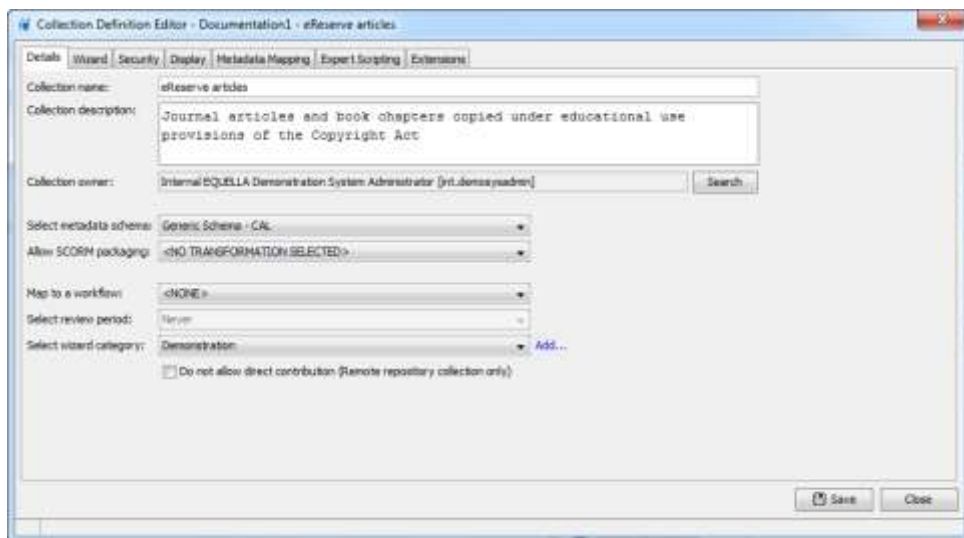
## ***Create a portion collection for book chapters and journal articles***

The portion collection created in this section using the **Collections Definition Editor** is called *eReserve articles*.

To add an eReserve articles portions collection


1. Click  in the **Administration Console** to display the Collection Definition Editor. An example is shown in Figure 31.






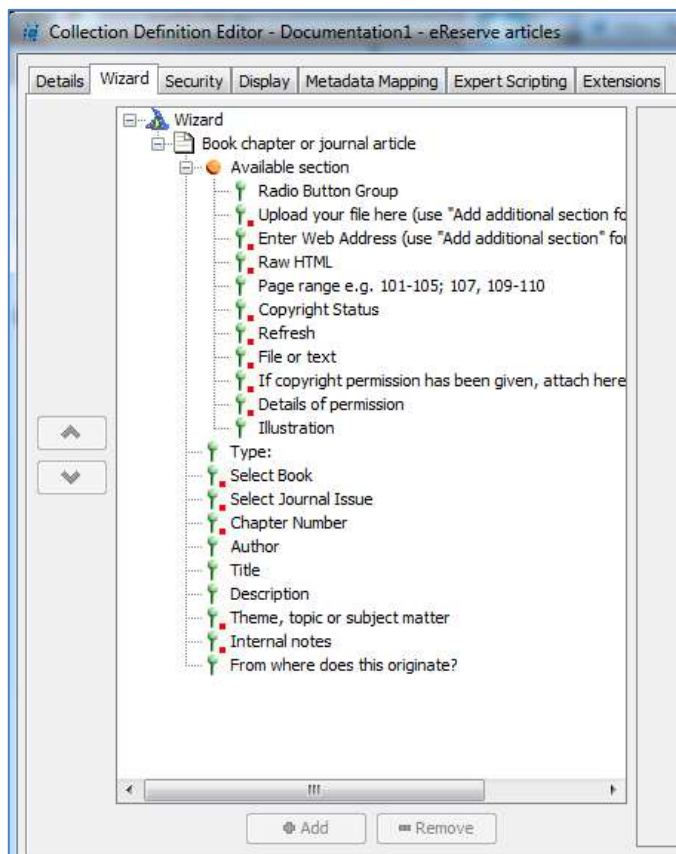
**Figure 31 Collection Definition Editor Details page—eReserve articles collection**

### To add the collection definition details

2. Enter appropriate information in the **Details** page. An example is shown in Figure 31:
  - a. **Collection name**—enter a unique display name for the collection (e.g. *eReserve articles*). Collections details are displayed to users on the **Contribute** page in the EQUELLA Digital Repository.
  - b. **Collection description**—enter a description for this collection. This description is displayed to help contributors choose a collection during the contribution process.
  - c. **Collection owner**—defaults to the current user. To change click  then browse and select a new owner.
  - d. **Select metadata schema**—select a metadata schema from the drop-down list (e.g. *Generic Schema - CAL*).
  - e. **Allow SCORM Packaging**—select from the drop-down list to allow resources in the collection to be downloaded as a SCORM compliant package.
  - f. **Map to a workflow**—select from the drop-down list to allow resources in this collection to automatically enter the selected workflow.
  - g. **Select review period**—select from the drop-down list to allow the period between moderation reviews to be set to ensure the resource remains current. This option is only available for collections that have an associated workflow.
  - h. **Select wizard category**—select a category from the drop-down list to allow provides a means for grouping collection definitions. Categories are displayed on the user contribution page in the EQUELLA Digital Repository. An example is shown in Figure 9. Select a wizard category (e.g. *Documentation*) from the list. If there is no suitable category, new ones can be created by clicking the **Add...** link.

### To create a collection definition wizard



The **Wizard** page enables the construction of a Contribution Wizard. The completed example *eReserve articles* Contribution Wizard is shown in Figure 32. The controls with a red dot  have an associated script.



**Figure 32 Wizard page—example eReserve articles collection**



The wizard is displayed to contributors in the EQUELLA Digital Repository when the collection definition (e.g. *eReserve articles*) is selected. An example wizard is shown in Figure 36.

### To add the wizard controls

1. Select the **Wizard** tab to display a **Wizard** page, an example is shown in Figure 12 . Configure this wizard using the same process as outlined in the [To add controls to a page](#) section on page 24.
2. Click  to display the **Select a control...** dialog. An example is shown in Figure .
3. Select a **Page** control from the list then click  to display the new page as a child node of the *Wizard* node.
4. Enter the **Title** (e.g. *Book chapter or journal article*) in the Control editor pane. This name is displayed to users on the corresponding wizard tab or sidebar list.

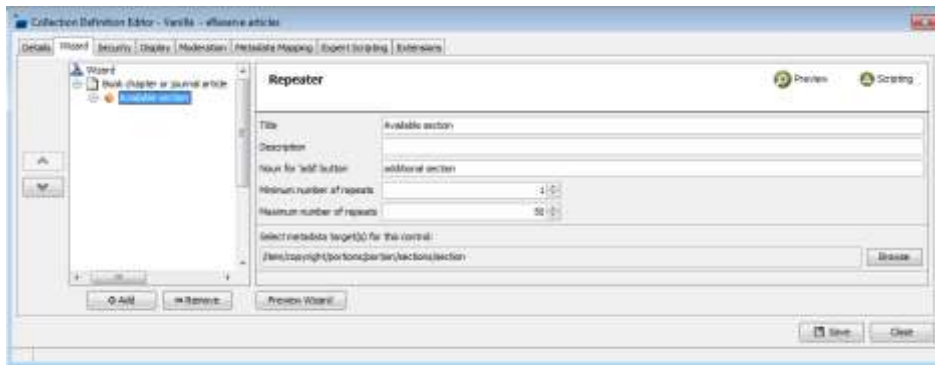
### To add controls to a page

When adding the following controls, leave the default values unless stated.

1. Select the *page* control (e.g. *Book chapter or journal article*) in the Hierarchy pane.
2. Click  to add a **Repeater** control then click  and enter the following:
  - a. **Title**—(e.g. Available Section).

- b. **Noun for 'add' button**—(e.g. *additional section*).
- c. **Maximum number of repeats**—(e.g. *50*).
- d. **Select metadata target(s) for this control**—(e.g. */item/copyright/portions/portion/sections/section*).

The Repeater control creates a field that can be duplicated. It is beneficial for copyright collections where each section consists of repeated input elements. The completed *Available section* control example is shown in **Figure 33**.



**Figure 33 Wizard page—example Repeater control**

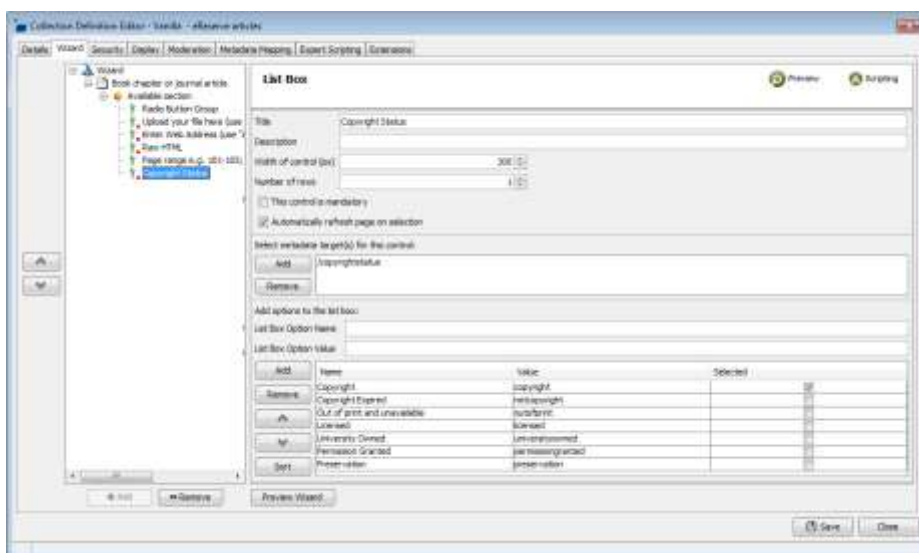
A repeater control requires at least one child to be added as it cannot be used in isolation.

### To add child controls to the repeater

1. Add a **Radio Button Group** control then click  to display the control in the Hierarchy pane. This control allows users to select one element from a group.
  - a. **Number of columns**—(e.g. *2*).
  - b. **Percentage spacing**—(e.g. *50*).
  - c. **Automatically refresh page on selection**—check the box.
  - d. **Select metadata target(s) for this control**—(e.g. */section/type*). (*NOTE: Only sub-elements are available in the **Choose a schema element?** dialog for child repeater controls.*)
  - e. **Radio Button Name**—(e.g. *File*).
  - f. **Radio Button Value**—(e.g. *file*).
  - g. **Selected**—check the box to set as the default radio button.
  - h. **Radio Button Name**—(e.g. *URL*).
  - i. **Radio Button Value**—(e.g. *url*).
2. Add a **Load Attachment** control then enter the following:
  - a. **Title**—(e.g. *Upload your file here (use "Add additional section for more than 1 file")*).
  - b. **This control is mandatory**—check the box.
  - c. **Select metadata target(s) for this control**—(e.g. *section/attachment*).
  - d. **Scripting**—(e.g. *if /item/copyright/portions/portion/sections/section/type != 'url'*). Further information on scripting is provided in the [To add a script](#) section on page 28.

3. Add a **Single URL Link** control then enter the following:
  - a. **Title**—(e.g. Enter Web Address (use "Add additional section" for more than 1 address)).
  - b. **This control is mandatory**—check the box.
  - c. **Select metadata target(s) for this control**—(e.g. *section/attachment*)
  - d. **Scripting**—(e.g. if /item/copyright/portions/portion/sections/section/type = 'url').
4. Add a **Raw HTML** control then enter the following:
  - a. **User Defined HTML**—(e.g. `<br>`).
  - b. **Scripting**—(e.g. if /item/copyright/portions/portion/sections/section/type = 'url').
5. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Page range e.g. 101-105; 107, 109-110).
  - b. **This control is mandatory**—check the box.
  - c. **Select metadata target(s) for this control**—(e.g. *section/pages*).
6. Add a **List Box** control then enter the following:
  - a. **Title**—(e.g. Copyright Status).
  - b. **Width of control(pixels)**—(e.g. 300).
  - c. **Automatically refresh page on selection**—check the box.
  - d. **Select metadata target(s) for this control**—(e.g. *section/copyrightstatus*).
  - e. **Scripting**—(e.g. if Role of User = 'Content Administrator').
  - f. **List Box Option Name**—(e.g. *Copyright* (selected as default)).
  - g. **List Box Option Value**—(e.g. *copyright*).
  - h. **List Box Option Name**—(e.g. *Copyright Expired*).
  - i. **List Box Option Value**—(e.g. *notcopyright*).
  - j. **List Box Option Name**—(e.g. *Out of print and unavailable*).
  - k. **List Box Option Value**—(e.g. *outofprint*).
  - l. **List Box Option Name**—(e.g. *Licensed*).
  - m. **List Box Option Value**—(e.g. *licensed*).
  - n. **List Box Option Name**—(e.g. *University Owned*).
  - o. **List Box Option Value**—(e.g. *universityowned*).
  - p. **List Box Option Name**—(e.g. *Permission Granted*).
  - q. **List Box Option Value**—(e.g. *permissiongranted*).
  - r. **List Box Option Name**—(e.g. *Preservation*).
  - s. **List Box Option Value**—(e.g. *preservation*).

The completed *Copyright Status* control example is shown in Figure 34.



**Figure 34 Wizard page—example List Box control**

7. Add a **Radio Button Group** control then enter the following:
  - a. **Title**—(e.g. *File or text*).
  - b. **Number of columns**—(e.g. 2).
  - c. **Automatically refresh page on selection**—check the box.
  - d. **Select metadata target(s) for this control**—(e.g. *section/permissiontype*).
  - e. **Radio Button Name**—(e.g. *File* (selected as default)).
  - f. **Radio Button Value**—(e.g. *file*).
  - g. **Radio Button Name**—(e.g. *Text*).
  - h. **Radio Button Value**— (e.g. *text*).
8. Add a **Load Attachment** control then enter the following:
  - a. **Title**—(e.g. If copyright permission has been given, attach here).
  - b. **This control is mandatory**—check the box.
  - c. **Select metadata target(s) for this control**—(e.g. *section/permission*).
  - d. **Scripting**—(e.g. if  
/item/copyright/portions/portion/sections/section/permissiontype = 'file')
9. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. Details of permission).
  - b. **Number of rows**—(e.g. 3).
  - c. **Select metadata target(s) for this control**—(e.g. *section/permission*).
  - d. **Scripting**—(e.g. if  
/item/copyright/portions/portion/sections/section/permissiontype = 'text').
10. Add a **Check Box Group** control then enter the following:
  - a. **Percentage spacing**—(e.g. 100).
  - b. **Select metadata target(s) for this control**—(e.g. *section/illustration*).
  - c. **Check Box Name**—(e.g. Does this have an Illustration/Table?).
  - d. **Check Box Value**—(e.g. *illustration*).

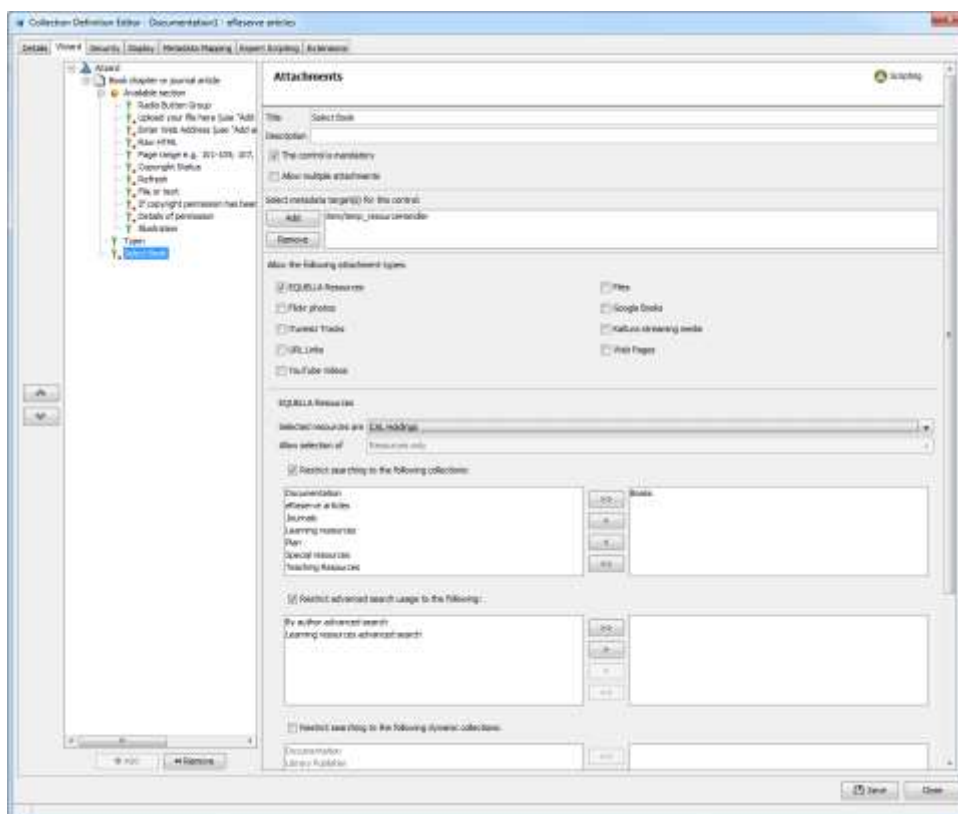
## To add child controls to the page control

1. Select the page control (e.g. *Book chapter or journal article*) in the Hierarchy pane.
2. Add a **List Box** control then enter the following:
  - a. **Title**—(e.g. *Type*).
  - b. **This control is mandatory**—check the box.
  - c. **Automatically refresh page on selection**—check the box.
  - d. **Select metadata target(s) for this control**—(e.g. *item/copyright/@parenttype*).
  - e. **List Box Option Name**—(e.g. *Journal article*).
  - f. **List Box Option Value**—(e.g. *Journal*).
  - g. **List Box Option Name**—(e.g. *Book extract*).
  - h. **List Box Option Value**—(e.g. *Book*).
3. Add an Attachments control then enter the following:
  - a. **Title**—(e.g. *Select Book*).
  - b. **This control is mandatory**—check the box.
  - c. **Scripting**—(e.g. *if /item/copyright/@parenttype = 'Book'*).
  - d. **Select metadata target(s) for this control** – (e.g. *item/temp\_resourceHandler*).
  - e. **Add the following attachment types** – select **EQUELLA Resources**
  - f. **Selected resources are**—(e.g. *Copyright Holdings*) to restrict resource selection. (*NOTE: This is a mandatory selection for CAL.*)
  - g. **Restrict searching to the following collections**—check to limit the collections that can be searched. Move collections (e.g. *Books*) that can be searched to the right-hand side of the shuffle box using the arrow buttons.
  - h. **Restrict advanced search usage to the following**—check to limit the advanced searches that can be searched. When no advanced searches are selected that option is not available in the Resource Selector selection page.
  - i. **Restrict searching to the following dynamic collections**—check to limit the **dynamic collections** that can be searched. Move dynamic collections that can be searched to the right-hand side of the shuffle box using the arrow buttons.
  - j. **Restrict contribution to the collections**—check to limit the collections available for contribution. Select collections (e.g. *Books*) that can be contributed to by using the arrow buttons.

When a search or contribution option has been restricted but no collections, searches or sources are selected, that option is not be available in the Resource Selector selection page. Refer to the *EQUELLA Wizard Controls Reference Guide* for more information.

The completed example *Resource Selector* control is shown in Figure 3541.





**Figure 35 Wizard page—example Resource selector**

4. Add a **Resource Selector** control then enter the following:
  - a. **Title**—(e.g. Select Journal Issue).
  - b. **This control is mandatory**—check the box.
  - c. **Scripting**—(e.g. if /item/copyright/@parenttype = 'Journal').
  - d. **Selected resources are**—(e.g. Copyright *Holdings*) to restrict resource selection. (*NOTE: this is a mandatory selection for CAL.*)
  - e. **Show home screen**—check the box to display the selection **Home** page.
  - f. **Show 'My Favourites'**—check the box to make user's **My Favourites** content available for selection.
  - g. **Restrict basic and guided searches to the following collections**—check to limit the collections that can be searched. Move collections (e.g. *Journals*) that can be searched to the right-hand side of the shuffle box using the arrow buttons.
  - h. **Restrict advanced search usage to the following**—check to limit the Advanced Searches that can be searched. When no advanced searches are selected that option is not available in the Resource Selector selection page.
  - i. **Restrict federated searches to the following sources**—check to limit the **Federated Search** sources that can be searched. Move federated searches (e.g. *Journals – Libraries Australia*) that can be searched to the right-hand side of the shuffle box using the arrow buttons.
  - j. **Restrict contribution to the collections**—check to limit the collections available for contribution. Select collections (e.g. *Journals*) that can be contributed to by using the arrow buttons.

5. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. *Chapter Number*).
  - b. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/number*).
  - c. **Scripting**—(e.g. if */item/copyright@parenttype = 'Book'*).
6. Add a **Shuffle List** control then enter the following:
  - a. **Title**—(e.g. *Author*).
  - b. **Description**—(e.g. Enter the author(s) of this chapter or article (Surname, Given) then click "Add").
  - c. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/authors/author*).
7. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. *Title*).
  - b. **Description**—(e.g. Please enter the full title of this chapter or article).
  - c. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/title* and *item/itembody/name*).
8. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. *Description*).
  - b. **Description**—(e.g. Please enter a description or abstract for this chapter or article).
  - c. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/abstract* and *item/itembody/description*).
9. Add a **Shuffle List** control then enter the following:
  - a. **Title**—(e.g. Theme, topic or subject matter).
  - b. **Description**—(e.g. Enter the theme, topic or subject matter then click "Add").
  - c. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/topics/topic*).
  - d. **Scripting**—(e.g. if */item/copyright@parenttype = 'Journal'* and Role Of User = 'Content Administrator Role').
10. Add an **Edit Box** control then enter the following:
  - a. **Title**—(e.g. *Internal notes*).
  - b. **Description**—(e.g. Additional notes re resources viewable only to content administrators).
  - c. **Number of rows**—(e.g. 2).
  - d. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/internalnotes*).
  - e. **Scripting**—(e.g. if Role of User = 'Content Administrator').
11. Add a **Radio Button Group** control then enter the following:
  - a. **Title**—(e.g. From where does this originate?).
  - b. **Number of columns**—(e.g. 2).
  - c. **Percentage spacing**—(e.g. 30).





- d. **Select metadata target(s) for this control**—(e.g. *item/copyright/origin*).
- e. **Radio Button Name**—(e.g. *Print* (selected as default)).
- f. **Radio Button Value**—(e.g. *print*).
- g. **Radio Button Name**—(e.g. *Online*).
- h. **Radio Button Value**—(e.g. *online*).

### To incorporate Copyright licensing

1. Select the Extensions tab in the Collection Definitions Editor to display the Extensions page.
2. Check the Copyright **Licensing** checkbox, an example is shown in Figure 22.  
(NOTE: Copyright *licensing messages and restrictions are applied to the Parent (holding) collections and not the portion collection, refer to the [Add error or agreement messages](#) section on page 32 for more information.*)

### Save the collection definition settings

1. Click  to save the configuration details.
2. Click  to close the Collection Definition Editor.

The copyright compliant *eReserve articles* portion collection is now complete. The wizard is displayed to contributors in the EQUELLA Digital Repository when the collection definition (e.g. *eReserve articles*) is selected. An example wizard is shown in Figure 36.

The screenshot shows the 'eReserve articles' collection definition wizard in the EQUELLA system. The interface is titled 'Contribute > eReserve articles' and includes a sidebar with various icons. The main form area is titled 'Book chapter or journal article' and contains several sections: 'Available section' with 'File' and 'URL' tabs, a text input for 'Upload your file here (note "Add additional section for more than 1 file")', a 'No attached resource' message, an 'Add a resource' button, a 'Page range e.g. 101-100; 107, 109-110' input, an 'Add' button, and a checkbox for 'Does this have an illustration/image?'. Below this is a 'Type' dropdown menu with the label 'Journal article or book chapter?'. The 'Author' section has a text input for 'Please enter the author(s) of this chapter or article (Surname, Given I.) then click "Add"' and an 'Add' button. The 'Title' section has a text input for 'Please enter the full title of this chapter or article'. The 'Description' section has a text input for 'Please enter a description or abstract for this chapter or article if required'. At the bottom, there is a 'From where does this originate?' section with 'Print' and 'Online' radio buttons. On the right side of the form, there are 'Save', 'Preview', and 'Cancel' buttons, and a yellow button labeled 'Book chapter or journal article'.

**Figure 36 User's view of the collection definition wizard—eReserve articles**

Further information on contributing resources to the *Books*, *Journals* and *eReserve articles* collections is provided in the *EQUELLA Copyright Resource Management User (CA and CLNZ) Guide*.

# Courses

EQUELLA Courses are used for copyright licence activation to show where the licensed content is used. Courses in EQUELLA should reflect the courses (by using the same course codes) used by any associated Learning Management System (LMS) such as Blackboard™ or Moodle™.

EQUELLA provides a sample course called *EQUELLA 101* with the *EQUELLA Vanilla Institution* and it provides a starting point for creating custom courses that closely fit the institution's purpose. The examples in this section are based on the *EQUELLA 101* Course.


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EQUELLA courses can be archived for future use or multiple courses can be imported in bulk by uploading a CSV file with appropriate information. Further information on courses is provided in the *EQUELLA Administration Overview Guide*.

## Create a course

Courses are created and modified using the **Courses** tool available in the **Administration Console**.

### To create a course

1. Select the **Courses** tool in the Administration Console.
2. Click  to display the **Course Editor**.

The **Course Editor** provides an interface for course configuration with the following tabs:

- **Details**—includes general information for a course.
- **Resource Selection**—provides choices for viewing resources.
- **Access Control**—controls access to a course.

### Details tab

The **Details** page provides general information and configurable elements for a course.

**Figure 37 Course Editor—Details page**

3. Enter appropriate information in the **Details** page. An example is shown in Figure 37:
  - a. **Course Name**—enter an appropriate course name (e.g. *EQUELLA 101*). This name is displayed to users when activating and managing copyright resources.
  - b. **Description**—enter an appropriate course description. This description is displayed on the resource’s **Copyright** page when a resource is activated. An email address or URL can be entered and are displayed as a clickable link.
  - c. **Department**—enter the name of the department responsible for material (e.g. *Sample Department*).
  - d. **Course Owner**—defaults to the course creator. Clicking  displays the **Select Recipients...** dialog where a new owner can be selected.
  - e. **Code**—enter an ID for linking the course to a LMS such as Blackboard™ or Moodle™. (*NOTE: The EQUELLA course code should be exactly the same as the course code used in the integrated system.*)
  - f. **Start Date**—selecting the course start date is optional. If this field is blank the course start date is determined by dates selected in the **Settings Course Defaults** options. Further information is provided in the *EQUELLA Administration Overview Guide*.
  - g. **End Date**—selecting the course end date is optional. If this field is blank the course start date is determined by dates selected in the **Settings Course Defaults** options. Further information is provided in the *EQUELLA Administration Overview Guide*.
  - h. **Unique Individuals**—enter the number of participants for the course (e.g. 25).
  - i. **Citation**—select a style from the drop-down list (e.g. *Generic*) to be used when citing licensed material (optional). The citation styles are configured during metadata schema creation.
  - j. **Course Type**—select an appropriate course type from the drop-down list (e.g. *Internal*).
  - k. **Archived**—leave this box unchecked. Checking this box prevents a course from displaying to users when activating and managing copyright resources.

## Resource selection tab

The **Resource Selection** page provides institution-wide and course specific settings for resource version selection. Resource selection configuration is used to determine which version of a resource is displayed when a resource is selected. These settings are applicable to resources selected and saved when using an Attachments control with EQUELLA Resources selected in a Contribution Wizard, and when EQUELLA is integrated with a LMS such as Blackboard™ or Moodle™.

1. Select the **Resource Selection** tab to display the **Resource Selection** page shown in Figure 38.



**Figure 38 Course Editor—Resource Selection page**

2. Select one of the following options that is applicable for your institution:
  - **Use the institution wide settings**—(default option) - select to apply the configured settings from the **Settings - Selection sessions** option.
  - **Force selection to be the resource version the user is viewing**—select to display the saved version of a resource.
  - **Force selection to always be the latest live resource version**—select to display the most recent live version of a resource even if the saved resource is for an older version.
  - **Select the resource version the user is currently viewing**—select to allow the user to choose between the saved resource version and most recent live version. This option defaults to the saved resource version.
  - **Always use the latest live resource version**—select to allow the user to choose between the saved resource version and most recent live version. This option defaults to the most recent resource version.

Further information is provided in the *EQUELLA Administration Overview Guide*.

## Access control tab



The **Access Control** page allows configuration of security properties associated with the selected course. Further information on managing privileges is provided in the *EQUELLA Security Administration Guide*.

The course privileges include:

- **CREATE\_COURSE\_INFO** = create a course
- **DELETE\_COURSE\_INFO** = delete this course
- **EDIT\_COURSE\_INFO** = edit this course

These privileges are typically granted to Administrators responsible for running bulk imports.

## Save the course settings

1. Click  to save the configuration details.
2. Click  to close the Course Editor.

# Copyright privileges

A system administrator can implement the security settings required by their institution.

Security settings are granted and revoked as is applicable for each institution. Copyright privileges can be set at Institution, Collection and Resource levels. This section provides typical practices that are suitable for most institutions.

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## Grant copyright permissions

EQUELLA provides the following copyright privileges:

- **COPYRIGHT\_ITEM** = edit copyright on resources
- **VIEW\_ACTIVATION\_ITEM** = view activation request on resources
- **DEACTIVATE\_ACTIVATION\_ITEM** = deactivate activation request on resources
- **DELETE\_ACTIVATION\_ITEM** = delete activation request on resources

The copyright permissions are typically defined in terms of *roles* and not *users* or *groups*.

- **Copyright item privilege**—typically granted to content contributors such as lecturers and teachers or librarians to create, edit and roll-over activations. Activation is initiated from the **Resource Summary** page of either the portion resource or Parent (holding) resource. Resource activations can be rolled-over from the **Manage Activations** page. Portion resources are generally activated from the start to end date of a term or semester. The resource becomes inactive at the end date of the activation period and can be rolled-over for the next term or semester, for the same or another course.
- **View activation item privilege**—allows resource activations to be tracked from the **Resource Summary Copyright** page. It is typically granted to content contributors such as lecturers and teachers or librarians to verify an resource's status before activating the resource.
- **Deactivate activations item privilege**—configures the deactivate option in the **Manage Activations** page. When an resource is deactivated the end date of active activations is set to the current date and the resource becomes inactive. The final period of activation in the Copyright report for that portion resource is from the initial date of activation through to and including the date of deactivation. For example, if a lecturer activates one article from a journal for a year but it is only used in semester one, then a copyright or content administrator with this privilege could deactivate the resource at the end of the semester. It is typically granted to members of the content or copyright management groups.
- **Delete activations item privilege**—enables the delete activate option in the **Manage Activations** link and **Copyright** page. It is used in rare cases where an institution may wish to delete activations that have been mistakenly created, for example a lecturer who incorrectly activates a single portion resource multiple times while trying to add it to their course. (*NOTE: This privilege should be highly restricted as the record of the prior activation period for that portion resource is erased and so*

*the activation period does not appear in the Copyright Report. It is typically only granted to a system administrator or one or two handpicked librarians who are in charge of the Copyright Report.)*

Further information on managing privileges is available in the *EQUELLA Security Guide*.

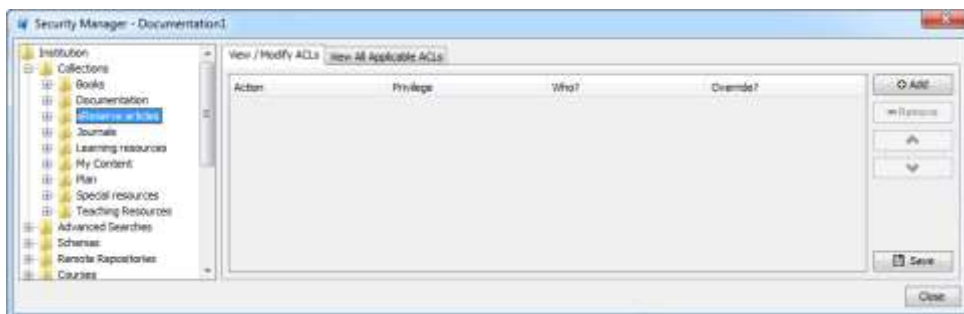
## Configure user access

The example in this section grants the copyright privileges to a specific Collection. Depending on the security settings required for your institution, a system administrator can implement the privileges at Institution, Collection and Resource levels. The example relies on *System Administrator*, *Content Administrator* and *Contributor* roles being present in the EQUELLA instance.

Copyright privileges are granted or revoked in the **Administration Console Security Manager** tool.

### Add copyright privileges

1. Select the **Security Manager** tool in the Administration Console to display the Security Manager.
2. Select an object group (e.g. *Collections*).
3. Select an object (e.g. *eReserve articles*) to display the **View/Modify ACLs** page. An example is shown in Figure 39.




**Figure 39 Security Manager**

In this example typical actions for copyright collections are added to allow a:

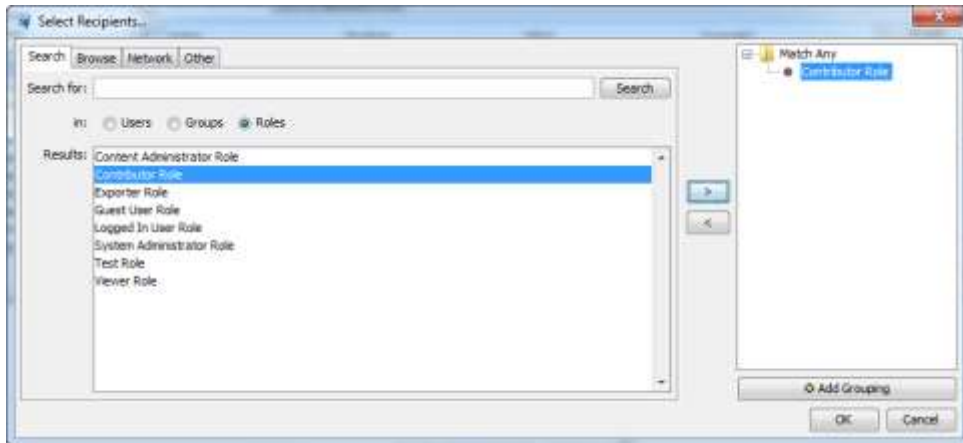
- *Contributor* to create, view and edit copyright resources.
- *Content Administrator* to deactivate copyright resources.
- *System Administrator* to delete copyright resources.

### To add the create privilege

1. Click  then:
  - a. Select the **Action** field then select **Grant** from the drop-down list. (*NOTE: The default is **Grant***).
  - b. Select the **Privilege** field then select **COPYRIGHT\_ITEM** from the drop-down list.
  - c. Select the **Who?** field to display the **Select Recipient** dialog then select the **Roles** button.



- d. Click  to display a list of available roles to choose from. Alternatively, type the first letter or letters of search resource then click .
- e. Select a role (e.g. *Contributor Role*).
- f. Move it to the right-hand pane using the  button.
- g. Remove *Everyone* by selecting it and clicking the  button, an example is shown in Figure 40.



**Figure 40 Select Recipients... dialog**

- h. Click  to display the privilege in the access control list.

### To add the view privilege

1. Click  to populate the list with previously listed data. Only the **Privilege** field require changes:
  - a. Select the **Privilege** field and select **VIEW\_ACTIVATION\_ITEM**.

Actions can now be added to allow a *Content Administrator* to deactivate copyright resources.

### To add the deactivate privilege

1. Click  to populate the list with previously listed data. Only the **Privilege** and **Who?** fields require changes:
  - a. Select the Privilege field then select DEACIVATE\_ACTIVATION\_ITEM.
  - b. Select the **Who?** field to display the **Select Recipient** dialog then select **Roles**.
  - c. Search for and select a role (e.g. *Content Administrator Role*).
  - d. Remove *Contributor Role* then click .

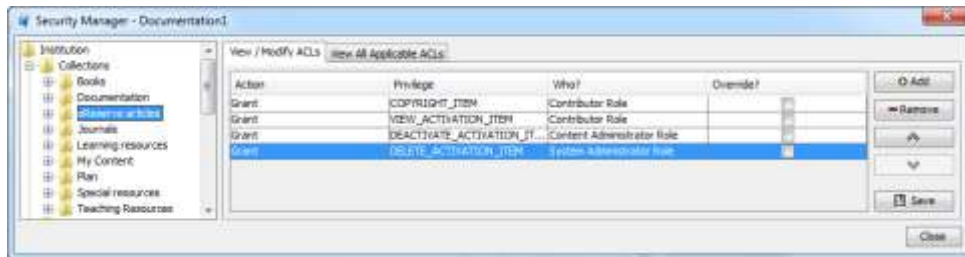
Actions can now be added to allow a *System Administrator* to delete copyright resources.

### To add the delete privilege

1. Click  button to populate the list with previously listed data. Only the **Privilege** and **Who?** fields require changes:
  - a. Select the Privilege field and select DELETE\_ACTIVATION\_ITEM.
  - b. Select the **Who?** field to display the **Select Recipient** dialog then select **Roles**.
  - c. Search for and select a role (e.g. *System Administrator Role*).

- d. Remove Content Administrator Role then click .
- e. Check the **Override?** checkbox to enable the *System Administrator* privileges on any child objects, allowing them control over all resources in EQUELLA.

The **Security Manager** with example privileges is shown in Figure 41. The actions assigned to the System Administrator now override any actions assigned to individual resources by users.



**Figure 41 Security Manager—example ACLs**

The access control list can be rearranged using the up and down buttons on the right of the Security Manager.

## Save the security settings

1. Click  to save the configuration details.
2. Click  to close the Security Manager.

# Manage activations

Administrators can conveniently control activated resources through the Manage Activations page.

The Manage Activations page is accessed from the navigation menu, and allows the user to view a list of previously activated resources. The results list can be filtered by course, owner or date range. Activated resources can be deactivated, deleted or rolled-over, individually or in bulk. Further information on managing activations is provided in the *EQUELLA Copyright Resource Management (CA and CLNZ) User Guide*.

---

# Reporting

EQUELLA provides a Copyright report that shows all activated content for the reporting period. The reports are presented using Copyright layout in HTML or PDF format and are appropriate for the *Copyright Agency Limited (CAL)*.

The Copyright report can be modified, refer to the *EQUELLA Reporting Guide* for more information on reports.

## Download the report file

The Copyright report files (Australian CA EUS Report and NZ CLNZ Report) can be obtained by emailing the Pearson EQUELLA Service Desk. (support@equella.com)

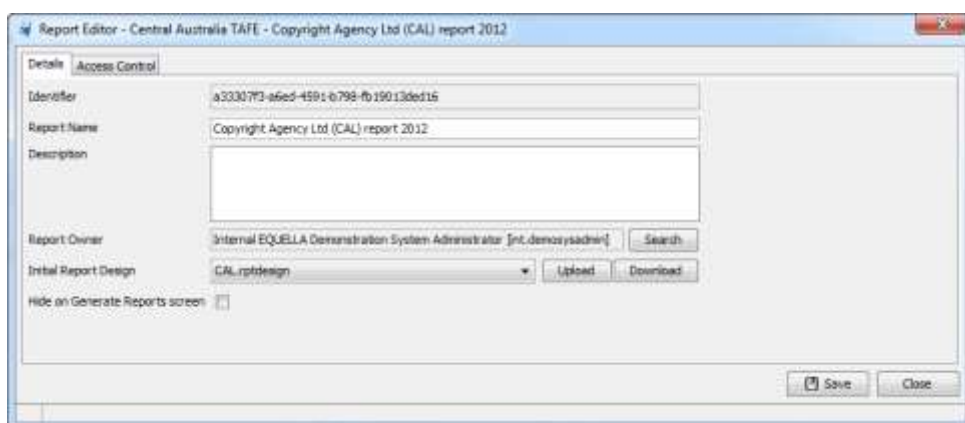
Reports are uploaded to the EQUELLA Administration Console and generated in the EQUELLA Digital Repository.

## Upload a report

Reports are uploaded using the **Reporting** tool available in the **Administration Console**.

To upload a report

1. Select **Reporting** in the Administration Console.
2. Click **Add** to display the **Report Editor**. An example **Details** page is shown in Figure 42.



**Figure 42 Report Editor**

3. Enter a **Report Name** (e.g. *The Copyright Agency (CA) EUS Report*) and **Description** for the report.
4. Click the **Upload** button and navigate to and select the rptdesign file. E.g. **CAL.rptdesign**

## Access Control tab

The **Access Control** page allows the administrator to configure user access to reports. Further information on managing privileges is available in the *EQUELLA Security Guide*.

The report privileges include:

- CREATE\_REPORT = create a report
- DELETE\_REPORT = delete this report
- DESIGN\_REPORT = design this report
- EDIT\_REPORT = edit this report
- EXECUTE\_REPORT = execute this report

These privileges are typically granted to administrators.

## Save the configuration details

1. Click the **Save** button to save the configuration details.
2. Click the **Close** button to close the Reporting Editor.

## Generate the report

Reports are generated in from the **Reports** option accessed from the navigation menu. Copyright compliance reporting collates copyright usage data recorded by the copyright compliant features and aggregates it by Parent (holding) resource type. Further information on generating reports is provided in the *EQUELLA Copyright Resource Management User (CAL) Guide*. An example Copyright Report is shown in Figure 49.

The screenshot shows the 'Copyright Agency Ltd (CAL) Report 2015' interface. It includes a header with report details and a main table with columns for report information and usage data.

Copyright Agency Ltd (CAL) Report 2015		Generating details		How much?		For whom?		Copied or communicated?		Copying (e.g.)	
Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details
Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details
Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details	Generating details

**Figure 49 Copyright Report**

# Remote repositories

Remote repository searches search external repositories. The returned information from a Z39.50 remote repository search can be used to automatically add information to fields in the Parent (holding) contribution wizard. When configured an import option is provided to the user for federated search results either selected directly from the remote repository search results page or through a Resource Selector wizard control.

When a remote repository search is configured to import results to the EQUELLA repository a library search option is also available. The library search only searches Z39.50 repository types and it also can automatically populate fields in the Parent (holding) collection contribution wizard. Advanced or basic searches can be configured depending on the type of searches the Z39.50 host supports. The advanced searching option provides the user with a greater selection of search conditions in the one query and basic searching presents a single keyword field that only accepts a simple search term.

EQUELLA provides a sample remote repository search called *Books – Libraries Australia* with the *EQUELLA Vanilla Institution* and it provides a starting point for creating custom remote repository searches that closely fit the institution's purpose. The examples in this section are based on the *Books – Libraries Australia* remote repository search.


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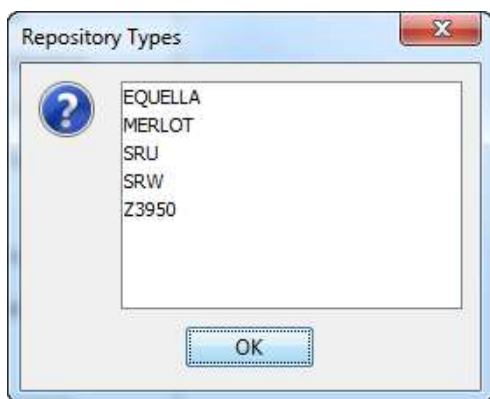
## Create a remote repository search

Remote repository searches are created and modified using the **Remote Repositories** tool available in the **Administration Console**. Further information on adding a remote repository is provided in the *EQUELLA Remote Repository Configuration Guide*.

To automatically import results to the Parent (holding) contribution wizard the process requires that an XSL Transformation (XSLT) is defined for this purpose and added to the Copyright schema and that the federated search is linked to the Parent (holding) collection.

### To create a remote repository search

1. Select the **Remote Repositories** tool in the Administration Console.
2. Click  **Add** to display the **Repository Types** dialog. An example is shown in Figure 43.



**Figure 43 Repository Types dialog**

3. Select the *Z3950 search* type and click  to display the **Remote Repository Editor**.

Z39.50 is a client/server protocol for locating information from remote computer databases, for example a university library title database.

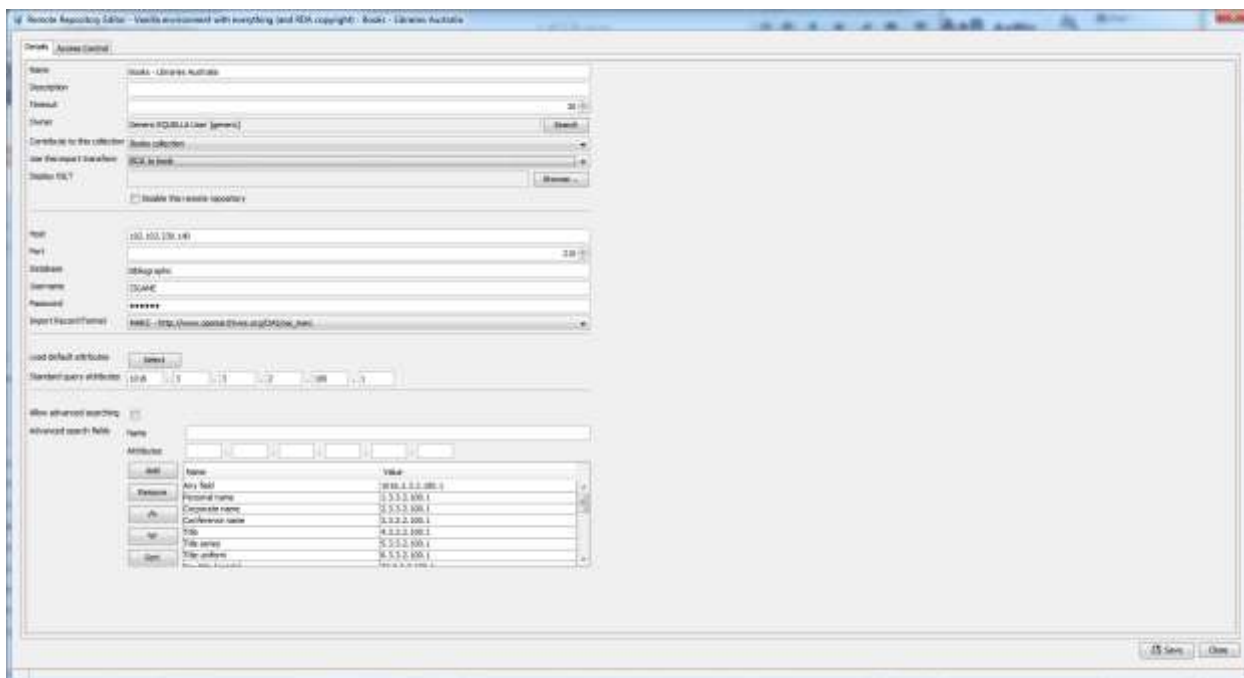
#### To add remote repository details

1. Enter a **Remote repository Name** (e.g. *Books – Libraries Australia*) and **Description**. An example is shown in Figure 44.
2. Select a Parent (holding) collection (e.g. *Books*) to import the results to, from the **Contribute to this collection** drop-down list.
3. Select an XSLT (e.g. *MARCXML to Book*) from the **Use this import transform** drop-down list. The list contains XSLTs that were added during the metadata schema creation. Further information on adding an import transformation is provided in the [Transformations tab](#) section on page 14.
4. Click  to select a custom transformation as the **Display XSLT**. This sets how the results from the server are displayed. Click  to change the transformation.
5. Enter the **Host** address of the search gateway. This can be either a host name or an IP address.
6. Enter the **Port** access port. The default port is 210, although some Z39.50 hosts use very high port numbers.

**NOTE:** If there are problems saving high port numbers please contact Support or your EQUELLA Consultant.

7. Enter the **Database** name of the database to be searched.
8. Enter the **Username** and **Password** used to access the repository (if authentication is required).
9. Select a suitable MODS or MARC standard from the **Import Record Format** drop-down list to set how the record is displayed.
10. Click **Select** to load default attributes – these may not work for all Z39.50 targets, in which case specific attributes can be configured using the *Advanced search fields*
11. Check the **Allow Advanced searching** checkbox to provide the user with a greater selection of search conditions in a library search query. (*NOTE: The Z39.50 host must support advanced searching for this option to be utilised.*)

12. Advanced search fields can be configured to exactly match the attributes supported by the remote target. To configure these options an understanding of the Z39.50 specification is required (<http://www.loc.gov/z3950/agency/Z39-50-2003.pdf>), as well as information about the configurations set up in the remote target. This information can be found in the web: e.g. for the National Library of Australia see <http://www.nla.gov.au/librariesaustralia/services/search/z3950/database-connection-details/>



**Figure 44 Remote repository Editor—example Details page**

## Access Control tab

The **Access Control** page allows the administrator to configure user access to the selected search. Further information on managing privileges is available in the *EQUELLA Security Guide*.

The federated search privileges include:

- CREATE\_FEDERATED\_SEARCH = create a federated search
- DELETE\_FEDERATED\_SEARCH = delete this remote repository
- EDIT\_FEDERATED\_SEARCH = edit this remote repository
- SEARCH\_FEDERATED\_SEARCH = search for records using this remote repository.

These privileges are typically granted to administrators and users with the ereserve manager or contributor role.

## Save the configuration details

1. Click Save to save the configuration details.
2. Click Close to close the Federated Search Editor.



Further information on contributing resources using federated and library searches is available in the *EQUELLA Copyright Resource Management (CA and CLNZ) User Guide*.

# Advanced searches

An advanced search provides a means for searching information (metadata) such as copyright material associated with collection definitions. Advanced searches are customised using wizard controls and an associated metadata schema with node elements that are indexed for advanced searching, enabling refined searches over particular resource types.

A collection could be made up of hundreds of resources, making a refined search a very useful tool.


EQUELLA provides a sample advanced search called *eReserve* with the *EQUELLA Vanilla Institution* and it provides a starting point for creating custom advanced searches that closely fit the institution's purpose. The examples in this section are based on the *eReserve* advanced search that is linked to the Parent (holding) resources (*Books* and *Journals*) and the portion resource (*eReserve articles*) collections. (NOTE: *Alternatively a separate advanced search can be configured for each collection.*) Further information on advanced searches is provided in the *EQUELLA Advanced Search Configuration Guide*.

---

## Create an advanced search

Advanced searches are created and modified using the **Advanced Searches** tool available in the Administration Console.

### To create an advanced search

1. Select the **Advanced Searches** tool in the Administration Console.
2. Click  **Add** to display the **Advanced Search Editor**.

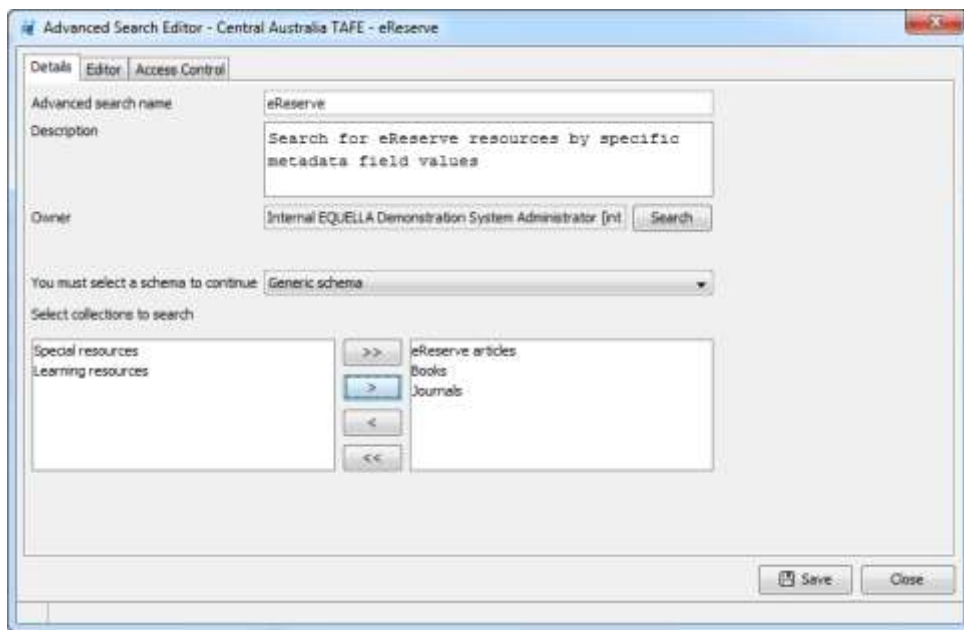
The **Advanced Search Editor** provides an interface for search configuration with the following tabs:

- **Details**—includes general information for a advanced search.
- **Editor**—provides an editor to add controls that create a wizard.
- **Access Control**—controls access to a advanced search.


### Details tab

General information, and the schema and collections to be associated with the advanced search are configured on the **Details** page.

1. Enter an **Advanced search name** (e.g. *eReserve*) and **Description** for the search on the **Details** page. An example is shown in Figure 45.



**Figure 45 Advanced Search Editor—Details page**

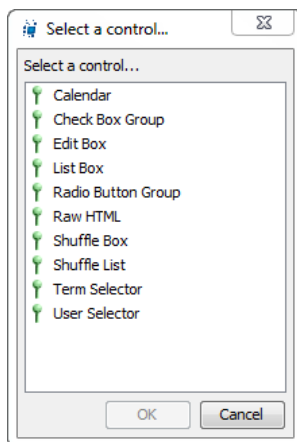
2. Select the schema (e.g. *Generic Schema*) from the **You must select a schema to continue** drop-down list to populate the **Select collections to search** list with collections associated to the selected schema.
3. Select the Parent (holding) (e.g. *Books, Journals*) and portion (e.g. *eReserve article*) collections and click  button.
4. Select the **Editor** tab to display the Editor page.

## Editor tab

The **Editor** page is where the advanced search page viewed by the user is created. Each control on the advanced search page targets a specific schema node. Nodes must be indexed for advanced searching when the schema is created otherwise they are not available to choose as a schema element. Further information is provided in the [Copyright metadata schema](#) section on page 8.

Any number of controls can be added. Refer to the *EQUELLA Advanced Search Configuration Guide* and the *EQUELLA Wizard Controls Reference Guide* for more information.

1. Click  to display the **Select a control...** dialog shown in Figure 46.

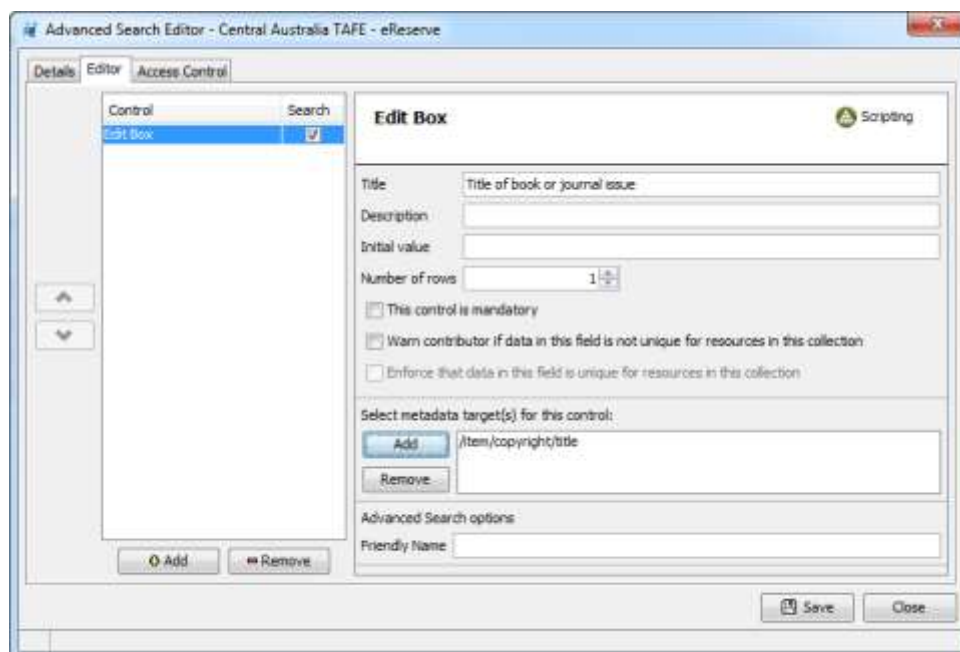


**Figure 46 Select a control... dialog**

2. Select an **Edit Box** control then click  to display the control in the control list. This control searches book or journal titles.

The **Search** checkbox is selected by default and regulates whether the search control is displayed to the user. An unchecked control requires an associated script to be evaluated (and return true) to be displayed. Leave the **Search** checkbox ticked for all the controls added in this example.

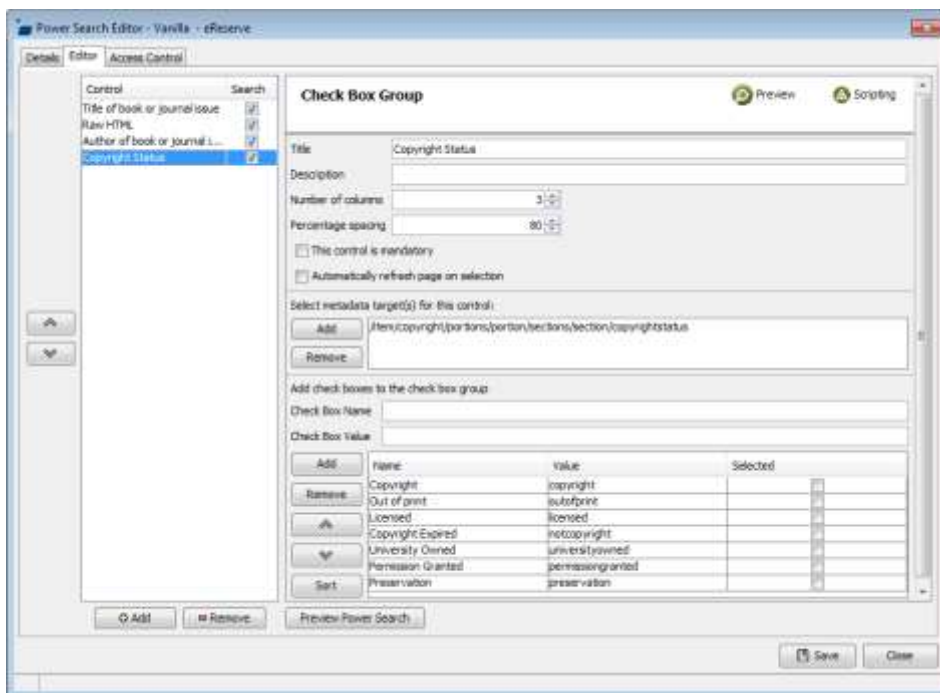
3. Select the control to display the editor pane on the right-hand side, an example is shown in Figure 47.











**Figure 47 Editor page—example Edit Box control details**





4. Enter the **Title** (e.g. Title of book or journal issue).
5.  Click  in the **Select metadata target(s) for this control:** section to display the **Choose a Schema element?** Dialog. An example is shown in Figure 48.
6. Click the **+** symbols to expand the tree. (*NOTE: Only the schema nodes indexed for advanced searching are available for selection.*)



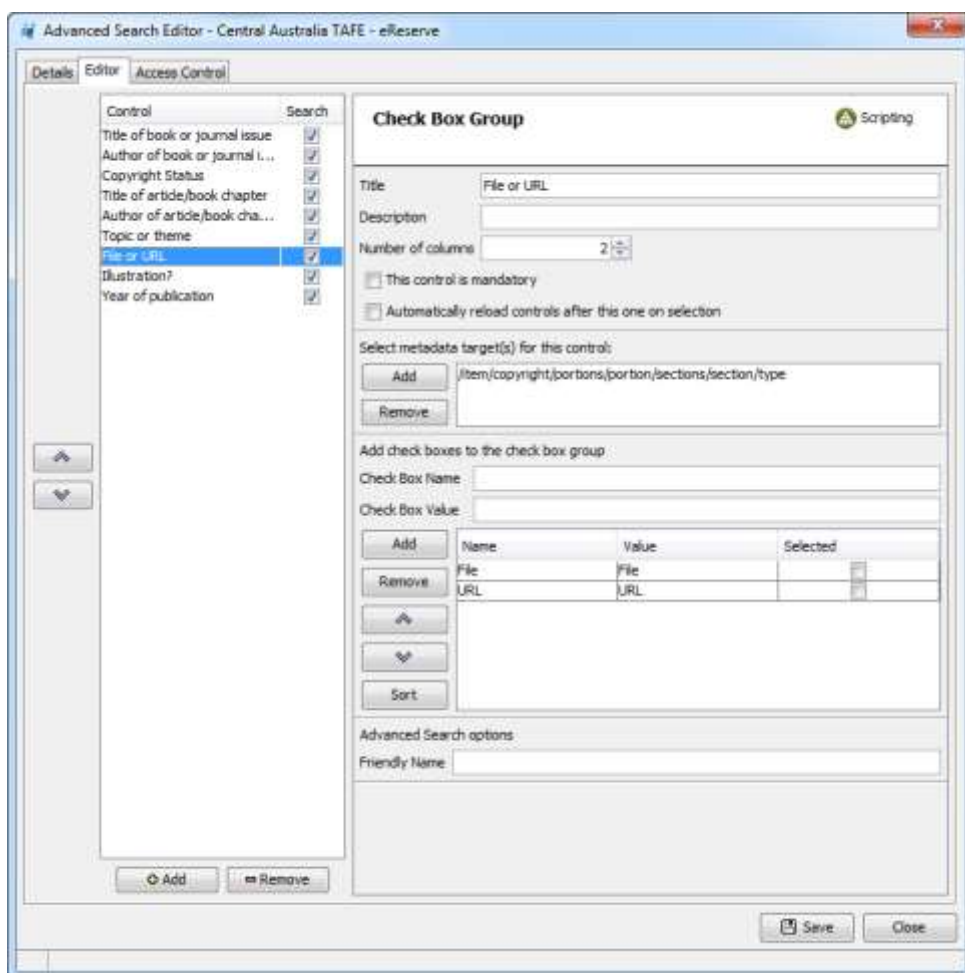


**Figure 49 Editor page—example Check Box Group control details**

10. Click  to add an **Edit Box** control then click . This control searches the book chapter or journal article titles.
  - a. **Title**—(e.g. Title of article/book chapter).
  - b. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/title*).
11. Click  to add an **Edit Box** control then click . This control searches the book chapter or journal article authors.
  - a. **Title**—(e.g. Author of article/book chapter).
  - b. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/authors/author*).
12. Click  to add a **Shuffle List** control then click . This control searches the topic or theme.
  - a. **Title**—(e.g. *Topic or theme*).
  - b. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/topics/topic*).
13. Click  to add a **Check Box Group** control then click . This control searches for files and URLs.
  - a. **Title**—(e.g. *File or URL*).
  - b. Number of columns—(e.g. 2).
  - c. **Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/sections/section/type*).
  - d. **Check Box Names** and **Check Box Values**—(e.g. *File* and *URL*). An example is shown in Figure 50.

14. Click  to add a **Check Box Group** control then click . This control searches for illustrations.
- Title**—(e.g. *Illustration*).
  - Number of columns—(e.g. *1*).
  - Select metadata target(s) for this control**—(e.g. *item/copyright/portions/portion/sections/section/illustration*).
  - Check Box Name**—(e.g. *Search for resources with Illustration/Tables?*).
  - Check Box Value**—(e.g. *illustration*).
15. Click  to add an **Edit Box** control then click . This control searches the book chapter or journal article authors.
- Title**—(e.g. *Year of publication*).
  - Select metadata target(s) for this control—(e.g. *item/copyright/publication/year*).

The completed example **Editor** page is shown in Figure 50.




Advanced Search Editor - Central Australia TAFE - eReserve

Details Editor Access Control

Control Search

- Title of book or journal issue ☒
- Author of book or journal i... ☒
- Copyright Status ☒
- Title of article/book chapter ☒
- Author of article/book cha... ☒
- Topic or theme ☒
- File or URL** ☒
- Illustration? ☒
- Year of publication ☒

**Check Box Group** 

Title: File or URL

Description:

Number of columns: 2

☐ This control is mandatory

☐ Automatically reload controls after this one on selection

Select metadata target(s) for this control:

Add Remove item/copyright/portions/portion/sections/section/type

Add check boxes to the check box group:

Check Box Name:

Check Box Value:

Name	Value	Selected
File	File	<input type="checkbox"/>
URL	URL	<input type="checkbox"/>

Advanced Search options

Friendly Name:

Add Remove Save Close

**Figure 50 Editor page—example Check Box Group control details**

## Access Control tab

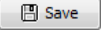
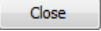
The **Access Control** page allows the administrator to configure user access to the selected search. Further information on managing privileges is available in the *EQUELLA Security Guide*.

The advanced search privileges include:

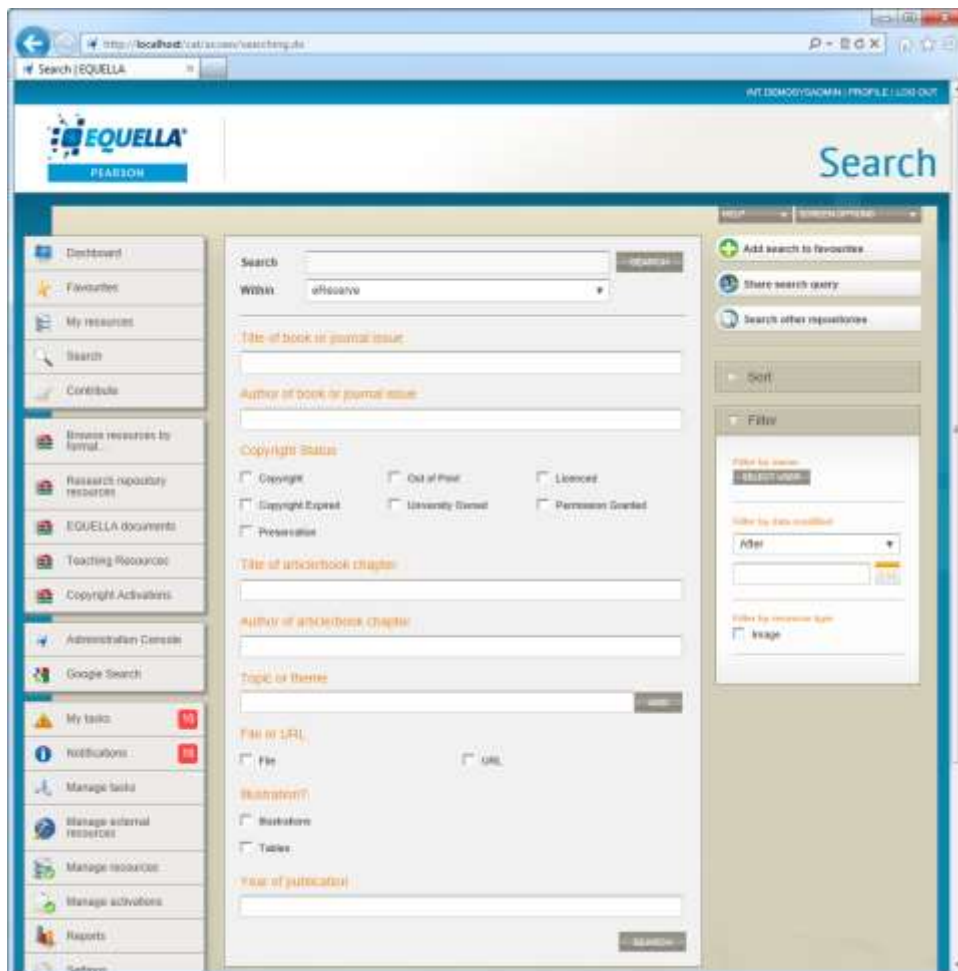
- CREATE\_POWER\_SEARCH = create an advanced search
- DELETE\_POWER\_SEARCH = delete this advanced search
- EDIT\_POWER\_SEARCH = edit this advanced search
- SEARCH\_POWER\_SEARCH = search for resources with this advanced search.

These privileges are typically granted to administrators and users with a searcher or viewer role.

## Save the configuration details

1. Click  to save the configuration details.
2. Click  to close the Advanced Search Editor.

The eReserve advanced search is now complete. All controls configured for the advanced search (e.g. eReserve) are displayed to the user when the Advanced Search is selected in the EQUELLA Digital Repository. An example is shown in Figure 51.



**Figure 51 User's view of the Advanced Search**

Further information on using this Advanced Search is available in the *EQUELLA Copyright Resource Management (CA and CLNZ) User Guide*.



## Close the Administration Console

To log out of the Administration Console

1. Click the  Exit Console button.

## Contact Client Support

We are always happy to help.

If your organisation has a support agreement with EQUELLA then help is available at [Support](#)