

# EQUELLA®

# Hierarchy Configuration Guide

*Version 6.2*

## Document History

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# Hierarchy overview

In addition to searching, the EQUELLA Digital Repository allows the administrator to define and control access to a hierarchy of logically grouped resources.

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

In EQUELLA, hierarchies can be dynamic in nature. This functionality allows administrators to create an environment where users can browse through categories to target their searches.

The purpose of this guide is to provide system administrators with an understanding of the EQUELLA Hierarchy Editor tool to create and manage topics and subtopics, and to illustrate how these hierarchy topics may be accessed for use.

Please note that this guide has been developed to best reflect the full capabilities of EQUELLA and as such may differ in appearance to your own installation.

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## Hierarchy privileges

There are three privileges linked to hierarchies:

- **EDIT\_HIERARCHY\_TOPIC**—users with this privilege have access to the Hierarchy editor to create and maintain hierarchies.
- **VIEW\_HIERARCHY\_TOPIC**—users with this privilege are able to see and use the Hierarchy topic links from the EQUELLA navigation menu and the Browse portlet.
- **MODIFY\_KEY\_RESOURCE**—users with this privilege are able to add and remove key resources to a hierarchy topic from the search results page, as well as the Action menu on the Resource summary page.

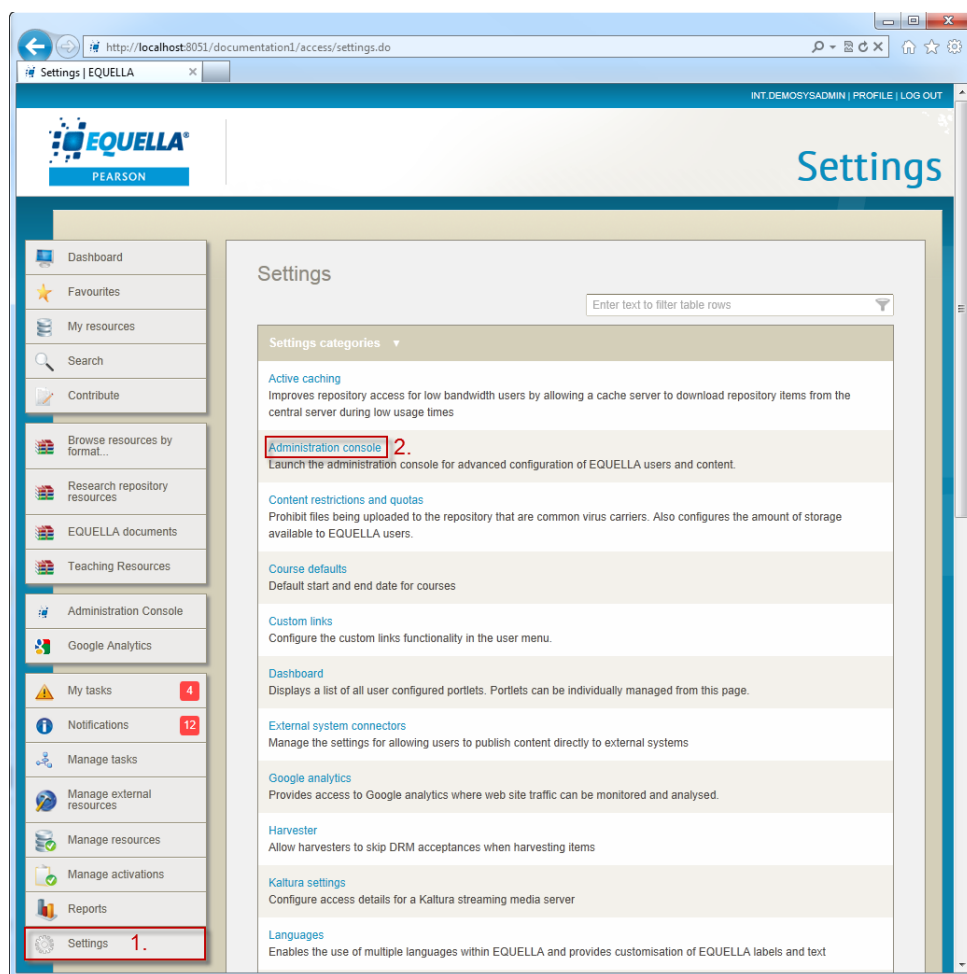
These privileges can be configured from the Security Manager (see the *EQUELLA Security Manager Configuration Guide* for more detail) or through the Access Control tab in the Hierarchy Editor tool. See [Access Control tab](#) on page 26 for more detail about hierarchy privileges.

## Hierarchy Editor

Hierarchies are created and maintained via the Hierarchy Editor, accessed from the EQUELLA Administration console.

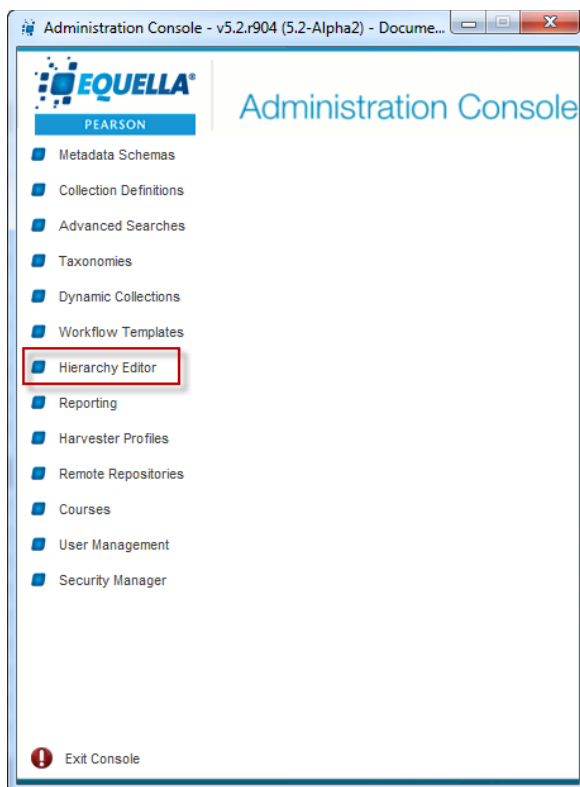
### To access the Hierarchy Editor

1. Log in to EQUELLA as an administrator, select **Settings** then **Administration console**, as shown in Figure 1.



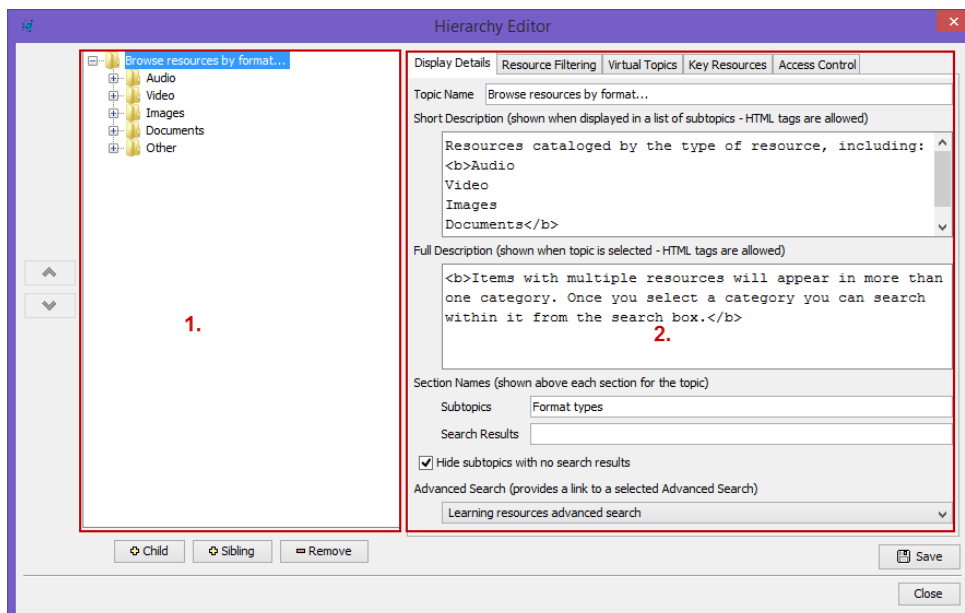
**Figure 1 Open Administration console**

2. The Administration console displays. Select **Hierarchy Editor**, as shown in Figure 2.



**Figure 2 Administration console—Hierarchy Editor**

The Hierarchy Editor displays, as shown in Figure 3.



**Figure 3 Hierarchy editor**

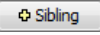

The Hierarchy Editor page is made up of two panes:

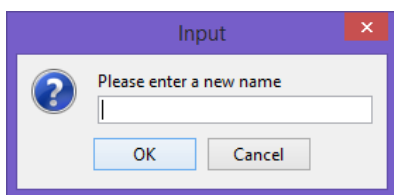
- **1. Hierarchy pane**—displays the hierarchy structure as an expandable/collapsible tree of topics and their children on the left-hand side of the page. Click on the + or – symbol beside a topic to display or hide the subtopics.

- **2. Topic editor**—displays the Hierarchy Editor pane for the selected topic or subtopic on the right-hand side of the page.


## Add hierarchy topics

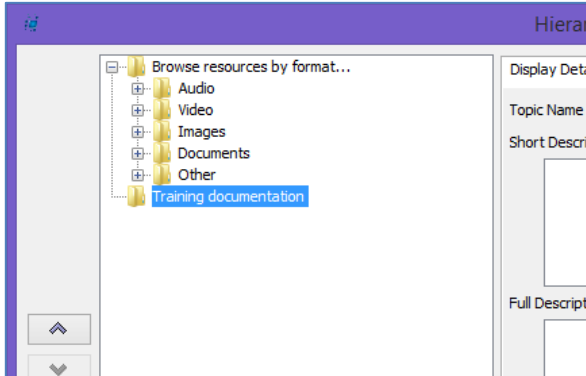
### To add a hierarchy topic

1. Select an existing topic in the Hierarchy pane (e.g. *Browse Resources by format...*).
2. Click  to add the new topic at the main topic level.  
(NOTE: If there are no existing topics then only the  button is available to add new topics.)
3. An **Input** dialog displays as shown in Figure 4.



**Figure 4 Input dialog**

4. Enter an appropriate name (e.g. *Training documentation*) then click . The new hierarchy topic (e.g. *Training Documentation*) now displays in the Hierarchy Editor. An example is shown in Figure 5.





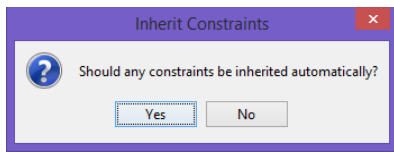
**Figure 5 New hierarchy topic**

## Add hierarchy subtopics

Hierarchy subtopics can be configured to automatically inherit any filters configured for the parent topic.

### To add a subtopic

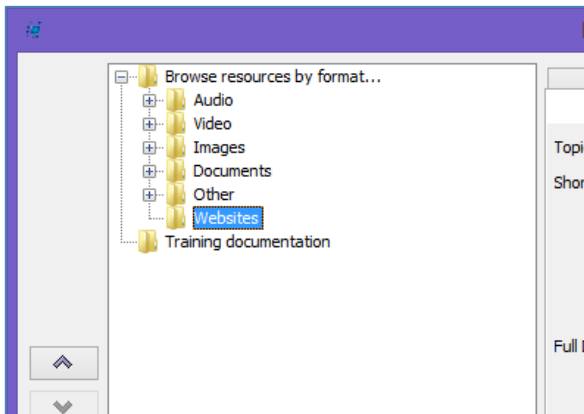
1. Select an existing topic in the Hierarchy pane (e.g. *Browse resources by format...*).
2. Click  to add the new subtopic to the selected topic.
3. Enter an appropriate name (e.g. *Websites*) in the displayed dialog then click . An **Inherit Constraints** dialog displays, as shown in Figure 6.



**Figure 6 Inherit constraints dialog**

The **Inherit Constraints** dialog has two options:

- —the current topic automatically inherits any filters that have been configured for the parent topic.
  - —requires that each child topic must be manually configured. See [Resource inheritance tab](#) on page 17 for more information.
4. Click  or . The new hierarchy subtopic (e.g. *Websites*) now displays in the Hierarchy Editor. An example is shown in Figure 7.



**Figure 7 New hierarchy subtopic**

## Delete hierarchy topics and subtopics

Hierarchy topics and subtopics can be deleted by highlighting the relevant topic or subtopic then clicking .

## Rearrange hierarchy topics and subtopics

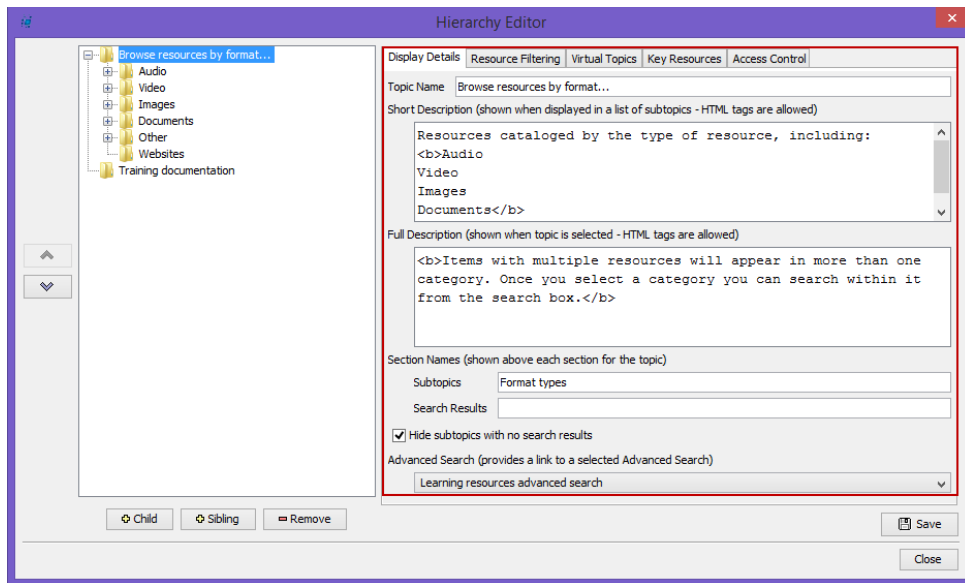
Hierarchy topics and subtopics can be rearranged to change the order in which they are displayed on the Browse page (see [Accessing hierarchical browsing](#) on page 31).

- Use  to move the selected element above its neighbouring sibling.
- Use  to move the selected element below its neighbouring sibling.

## Topic editor

Select a topic or subtopic from the hierarchy pane to display the Topic editor on the right-hand side. See [Add hierarchy subtopics](#) on page 7. An example of a topic with the Topic editor enabled is shown in Figure 8.





**Figure 8 Topic editor for resource topic**

The Topic editor (for a resource topic) has the following tabs:

- **Display Details**—configures topic and subtopic details, including display name, descriptions, layout and an optional Advanced Search link. See [Display details tab](#) on page 9 for more information.
- **Resource Filtering**—configures search restrictions by schema or collection to enable targeted browsing. See [Resource filtering tab](#) on page 13 for more information.
- **Resource Inheritance**—configures subtopics to inherit attributes that have already been defined in the parent topic. See [Resource inheritance tab](#) on page 17 for more information. The preselected configuration on this page will differ according to the **Inherit constraints** selection made during subtopic creation. (See [Add hierarchy subtopics](#) on page 7 for more information.)

(NOTE: The Resource Inheritance tab is only relevant to subtopics and therefore only appears in the Topic editor pane when a subtopic is selected.)

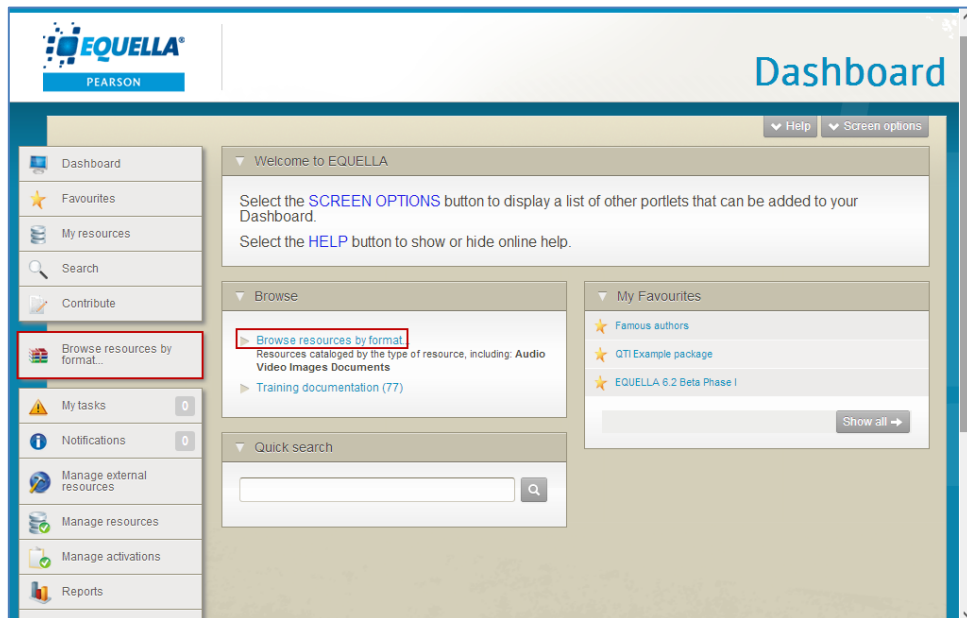
- **Virtual Topics**—configures a dynamic hierarchy where associated XPath values automatically display as topics or subtopics when browsing the hierarchy. See [Virtual topics tab](#) on page 19 for more information.
- **Key Resources**—allows the addition of key resources to the hierarchy topic or subtopic. See [Key resources tab](#) on page 24 for more information.
- **Access Control**—configures access privileges for selected topic or subtopic. See [Access control tab](#) on page 26 for more information.

## Display Details tab

The **Display Details** page elements are:

## Topic name

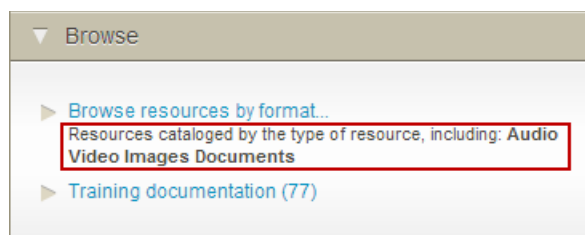
The topic name is the editable display name shown as the topic link in the EQUELLA navigation menu and Browse portlet (e.g. *Browse resources by format...*). An example is shown in Figure 9.



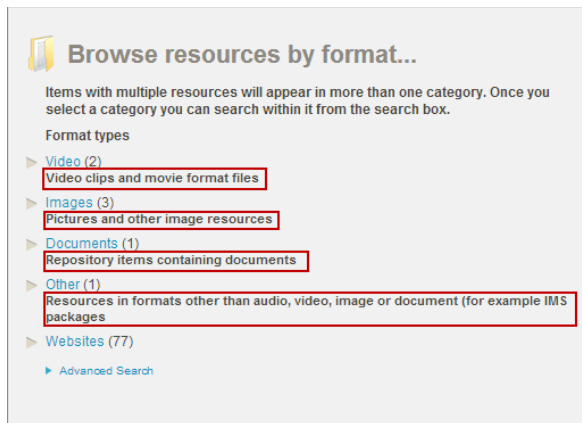
**Figure 9 Topic name**

## Short description

The short description is a brief description of the topic or subtopic, and allows HTML tags. It displays under the topic name in the Browse portlet, and under the subtopic name once the topic link has been selected. An example of the topic short description is shown in Figure 10 and an example of the subtopic short description is shown in Figure 11



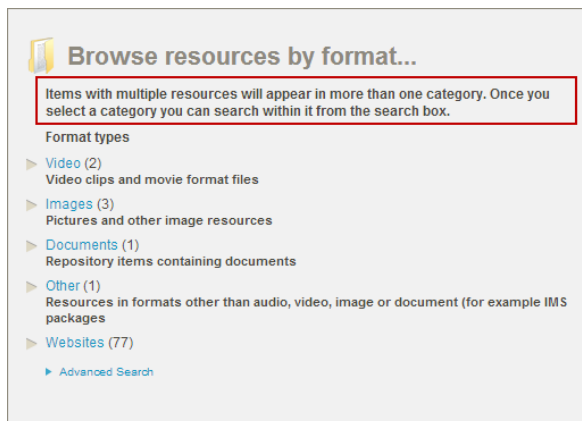
**Figure 10 Topic short description**



**Figure 11 Subtopic short description**

## Full description

The full description is a more detailed description of the purpose of the topic or subtopic, and allows HTML tags. This field could also be used to provide information or instructions to the user. The full description displays once the topic or subtopic link has been selected. An example is shown in Figure 12.

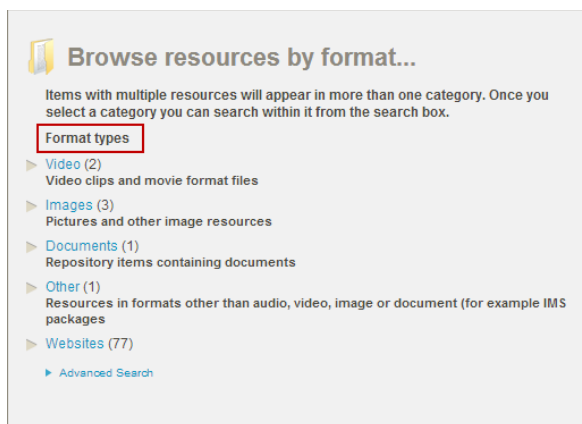


**Figure 12 Topic full description**

## Section names

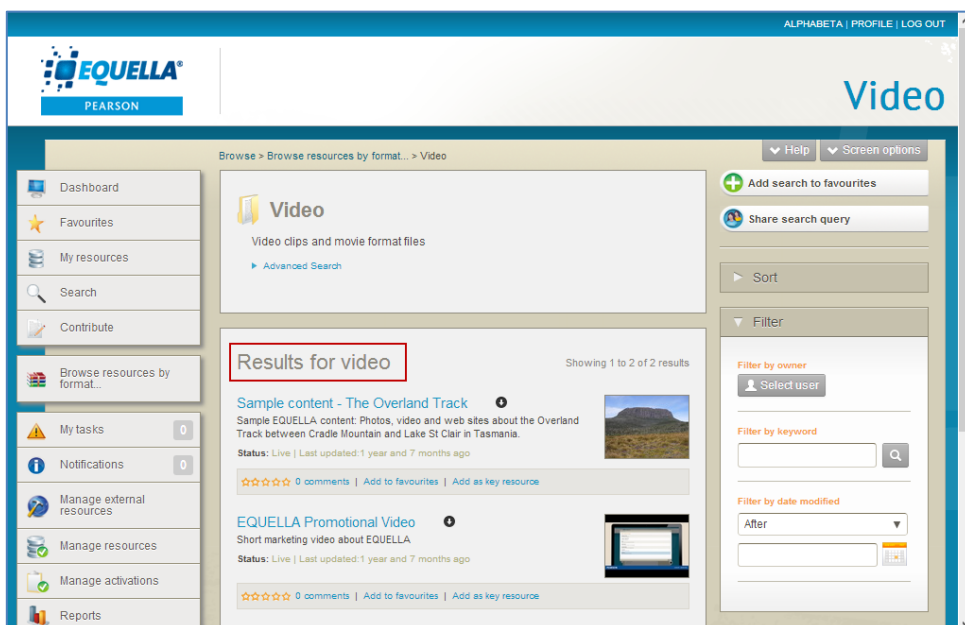
Section names can be configured to display above subtopics or above results:

- **Subtopics**—Enter descriptive text to display above the subtopics once the topic has been selected (e.g. *Format types*). An example is shown in Figure 13.



**Figure 13 Section Names—Subtopics display**

- **Search Results**—Enter the text to display at the top of the results page (e.g. *Results for video*). The default value is 'Results'. An example is shown in Figure 14.



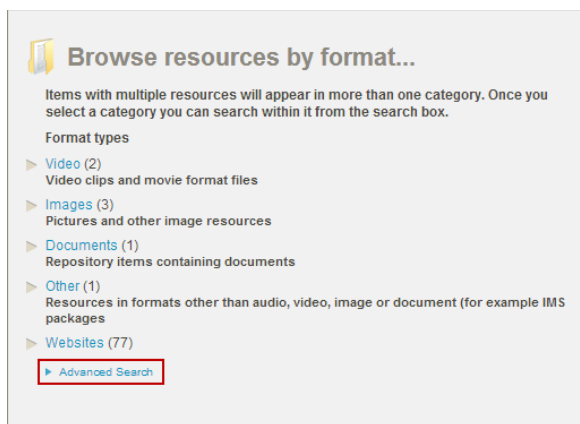
**Figure 14 Section Names—Search Results display**

## Hide subtopics with no search results

Check this box at a parent level to prevent subtopics with no results from displaying.

## Advanced search

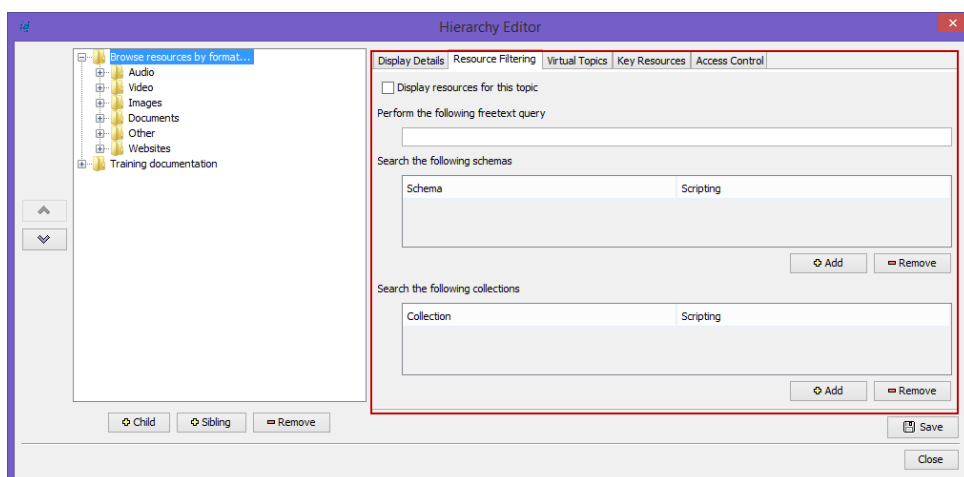
The **Advanced Search** drop-down lists all advanced searches configured in the EQUELLA system and provides the option of associating the hierarchy topic with an advanced search, allowing for targeted searching using specific metadata to refine search results. Select an advanced search (e.g. *Learning Resources*), or leave at the default **<No advanced search selected>**. When an advanced search is selected an **Advanced Search** link is displayed on the Search page. An example is shown in Figure 15.



**Figure 15 Advanced search link**

## Resource Filtering tab

The **Resource Filtering** page provides options for configuring the type of results to be displayed. Only the contents of selected schemas and collections are displayed. If this page is not configured, all repository resources are displayed under the hierarchy topic. An example of a Resource Filtering page is shown in Figure 16.

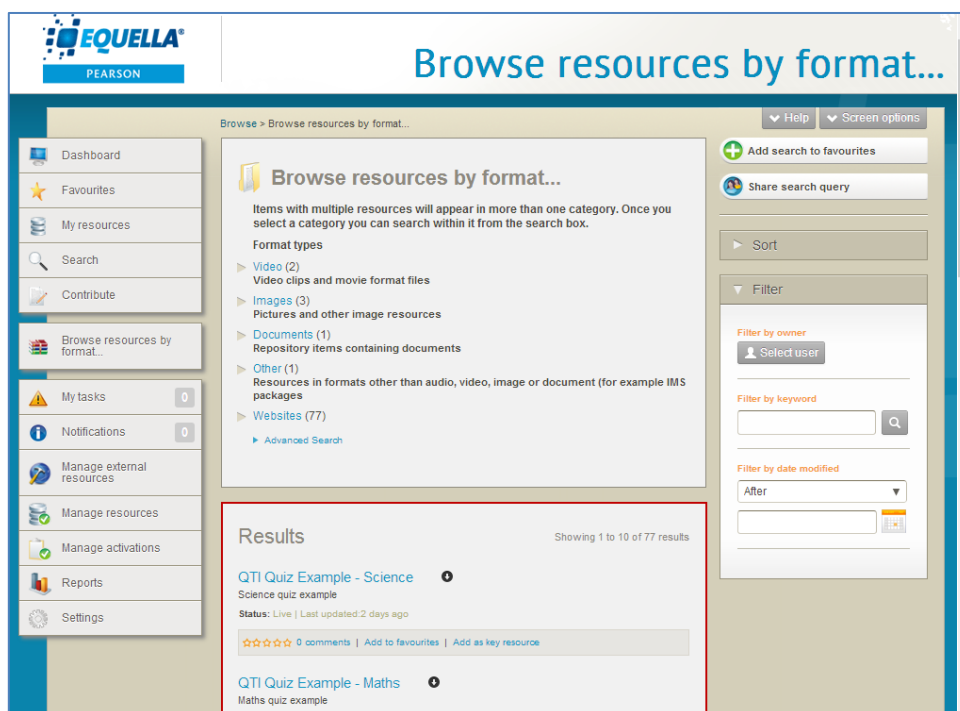


**Figure 16 Resource Filtering page**

The Resource Filtering page elements include:

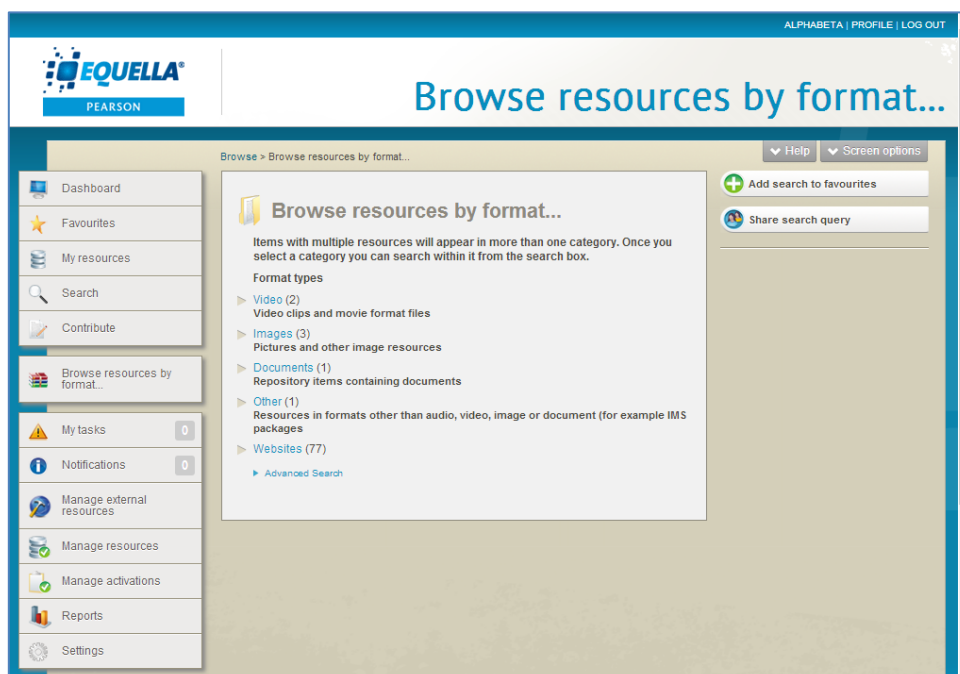
### Display resources for this topic

When this box is checked (default), the results list of resources matching the topic or sub-topic are displayed. An example is shown in Figure 17.



**Figure 17 Results displayed for topic**

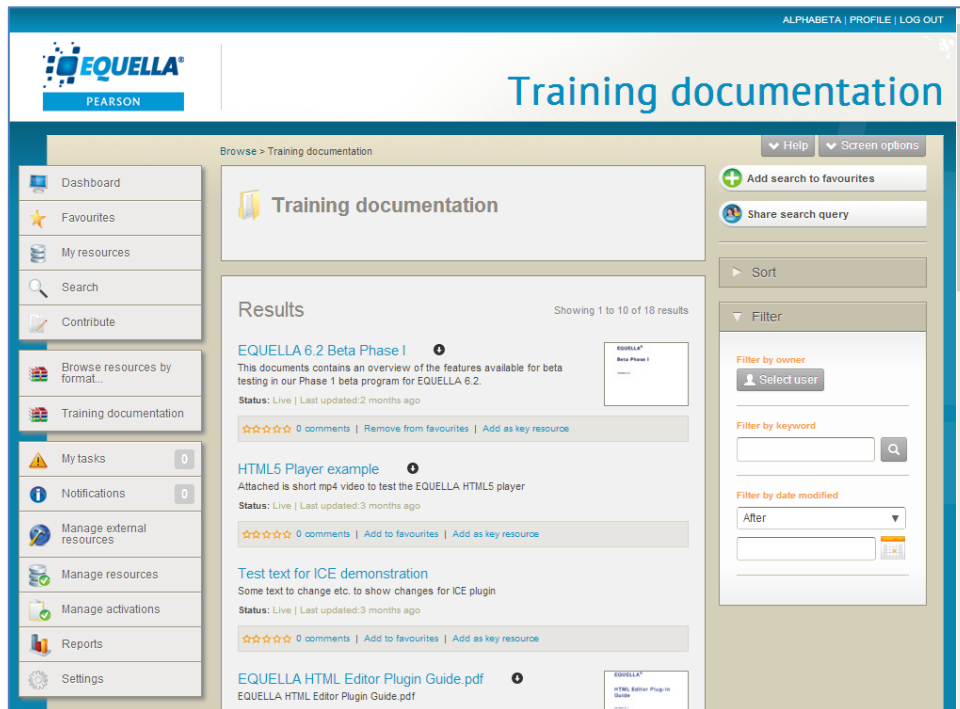
Where the option is unchecked, results are not displayed. This option could be used where a subtopic needs to be selected before results are displayed, as shown in Figure 18.



**Figure 18 No results displayed for topic**

## Perform the following freetext query

Enter search terms in the freetext query box to restrict results from this topic or subtopic to resources containing the specified terms. For example, entering the search term 'equella' in the query box means that only those resources containing the search term *EQUELLA* are displayed, as shown in Figure 19.



**Figure 19 Search results containing search term 'EQUELLA'**

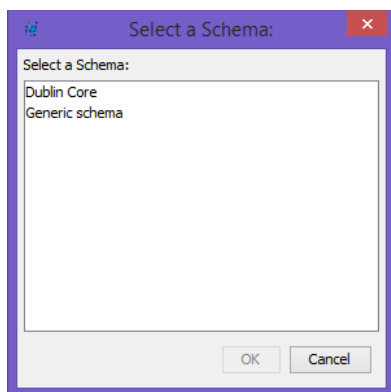
(NOTE: There is no notification on the screen when performing a hierarchy search to inform the user that a freetext search term has been specified in the Hierarchy editor.)

## Search the following schemas

Adding a schema or schemas restricts searches to resources belonging only to collections associated with the specified schemas.

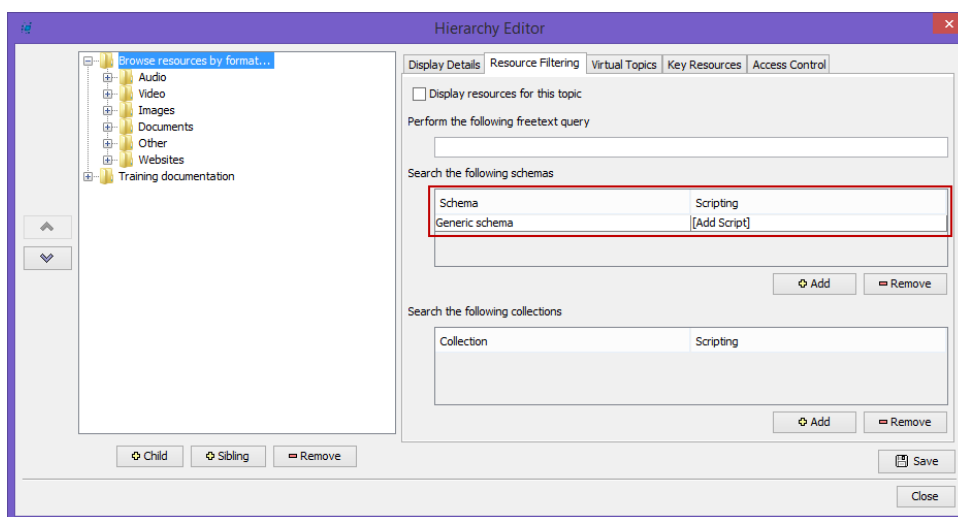
### To add a schema

1. Click  to display the **Select a Schema:** dialog. An example is shown in Figure 20.



**Figure 20 Select a schema dialog**

2. Select the required schema from the list (e.g. *Generic Schema*).
3. Click **OK** to display the schema in the list, as shown in Figure 21.



**Figure 21 Schema added to list**

Multiple schemas may be added.

Optional scripts can be added for further refinement.

### To add a script

1. Click **[Add Script]** to display the Script Editor. See the *EQUELLA Scripting Guide (Basic)* for more information on adding scripts.

### To remove a schema from the list

1. Select the relevant schema then click **Remove**.

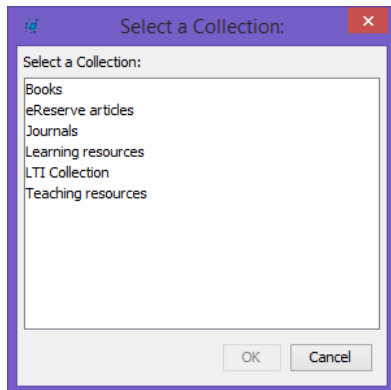
## Search the following collections

Adding a collection or collections restricts searches to resources belonging only to those collections.




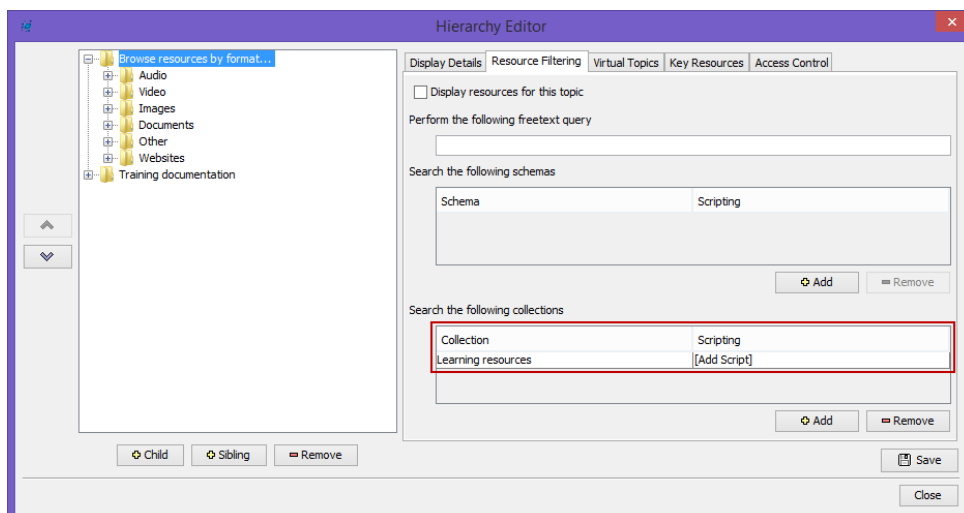
### To add a collection

1. Click  to display the **Select a Collection:** dialog. An example is shown in Figure 22.



**Figure 22 Select a collection dialog**

2. Select the required collection from the list (e.g. *Learning Resources*).
3. Click  to display the collection in the list, as shown in Figure 23.



**Figure 23 Collection added to list**

### To add a script

1. Click **[Add Script]** to display the script editor. See the *EQUELLA Scripting Guide (Basic)* for more information on adding scripts.

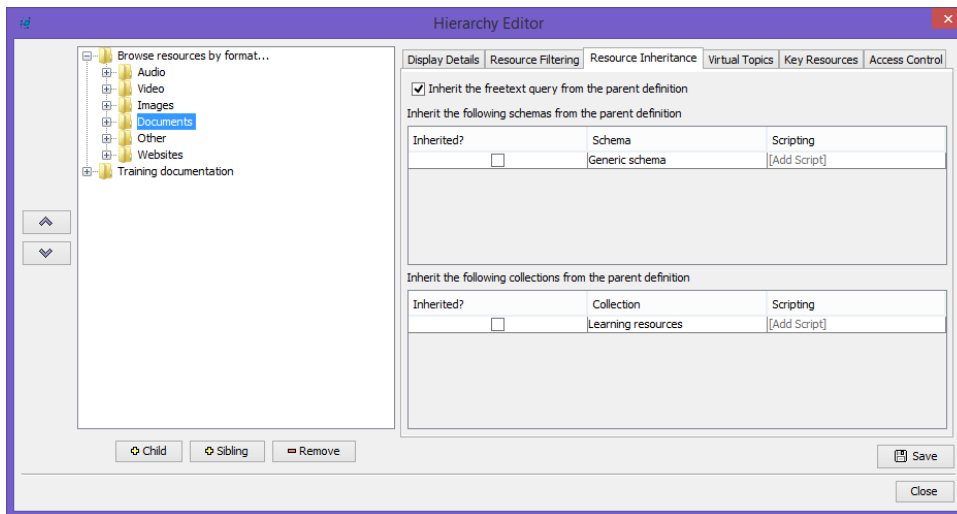
### To remove a collection from the list

1. Select the relevant collection then click .

## Resource Inheritance tab

The **Resource Inheritance** page enables subtopics to inherit attributes that have already been defined in the parent topic (therefore this tab doesn't appear at a topic level). Resource inheritance can be selected during subtopic creation (see [Add hierarchy](#)

[subtopics](#) on page 7 for more information). If the **Yes** option is selected from the **Inherit Constraints?** dialog, the checkboxes on this page are selected by default. If the **No** option is selected, the checkboxes are unselected. An example is shown in Figure 24.



**Figure 24 Resource Inheritance page**

The Resource Inheritance page elements include:

## Inherit the freetext query from the parent definition

If a freetext query has been configured for the parent topic, select this checkbox to only display resources matching the specified search terms when this subtopic is selected. See [Perform the following freetext query](#) on page 15 for more information.

## Inherit the following schemas from the parent definition

Schemas that were selected at a topic level are listed here.

### To select a schema

1. Check the **Inherited?** checkbox next to the required schemas.

### To add an optional script

1. Click **[Add Script]** to display the script editor. See the *EQUELLA Scripting Guide (Basic)* for more information on adding scripts.

## Inherit the following collections from the parent definition

Collections that were selected at a topic level are listed here.

### To select a collection

1. Check the **Inherited?** checkbox next to the required collection.

### To add an optional script


1. Click **[Add Script]** to display the script editor. See the *EQUELLA Scripting Guide (Basic)* for more information on adding scripts.

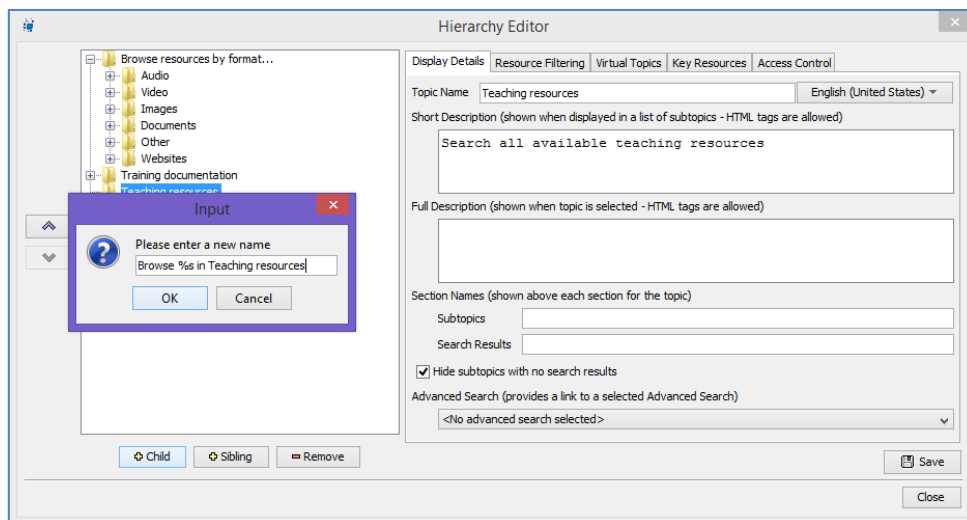
## Virtual Topics tab

The **Virtual Topics** page enables the configuration of dynamic hierarchies, where a metadata node can be selected to return either all contributed resources with a value for the given field, or resources with values from the metadata node that match values from a manually entered list.

This functionality allows administrators to create an environment where users can browse through categories to target their searches. Hierarchy topics could be dynamically created from a set of key learning areas using the **Virtual Topics** feature, mapping to a specific XPath. When relevant resources are contributed, a value would need to be entered against this XPath, which then automatically displays the relevant hierarchy topic or subtopic upon submission.

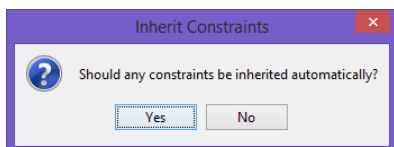
### To create a virtual topic

1. Select a relevant topic then click .
2. Enter a name. The name for the subtopic should include the placeholder **%s**, which could be used alone or as part of a longer term (e.g. *Browse %s in Teaching Resources*). This placeholder is replaced with the value of the matching XPath. An example is shown in Figure 25.




**Figure 25 Add and name virtual topic**

3. Click . An **Inherit Constraints** dialog displays, as shown in Figure 26.

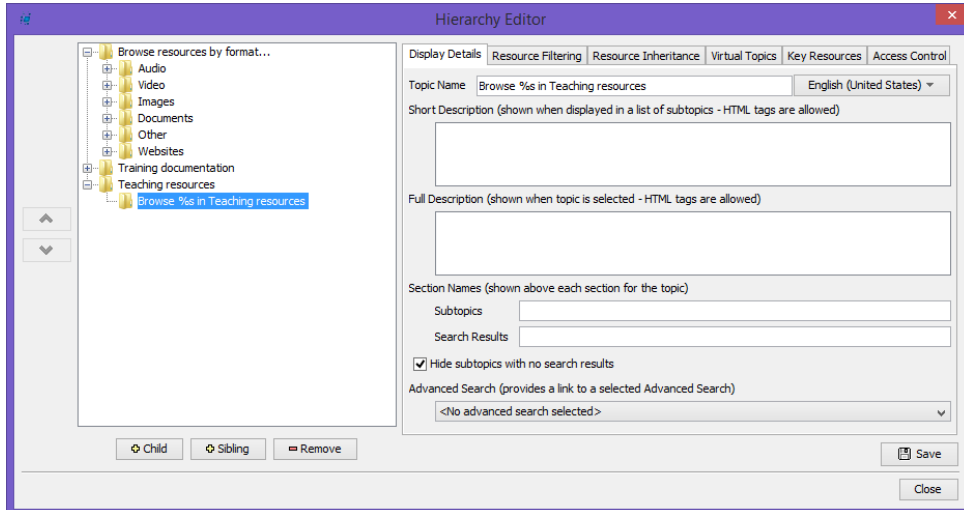


**Figure 26 Inherit constraints dialog**

The **Inherit Constraints** dialog has two options:

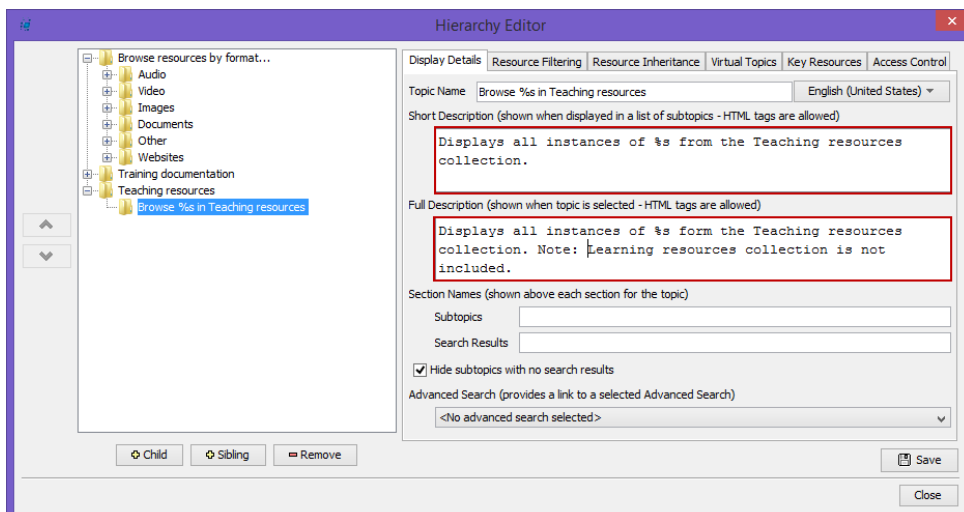
4.  —the current topic automatically inherits any filters that have been configured for the parent topic.

5.  —requires that each child topic must be manually configured. See [Resource inheritance tab](#) on page 17 for more information.
6. Click  or . The new hierarchy subtopic (e.g. *Browse %s in Teaching Resources*) now displays in the Hierarchy Editor, as shown in Figure 27.



**Figure 27 New subtopic added**

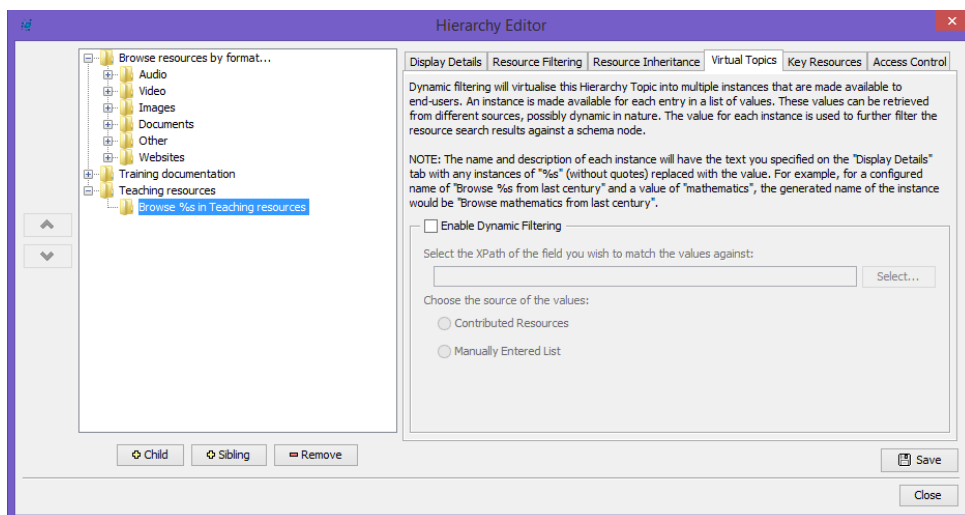
The placeholder **%s** can also be incorporated into the *Short Description*, *Full Description*, *Subtopics* and *Search Results* fields (e.g. *Displays all instances of %s from the Teaching Resources collection*). An example is shown in Figure 28.



**Figure 28 Short and full descriptions with placeholder '%s' incorporated**

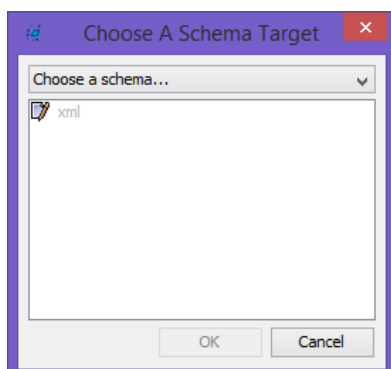
See [Display details tab](#) on page 9, [Resource filtering tab](#) on page 13, [Resource inheritance tab](#) on page 17, [Key resources tab](#) on page 24 and [Access control tab](#) on page 26 for more information on these pages.

7. Click on the **Virtual Topics** tab. The Virtual topics page displays, as shown in Figure 29.



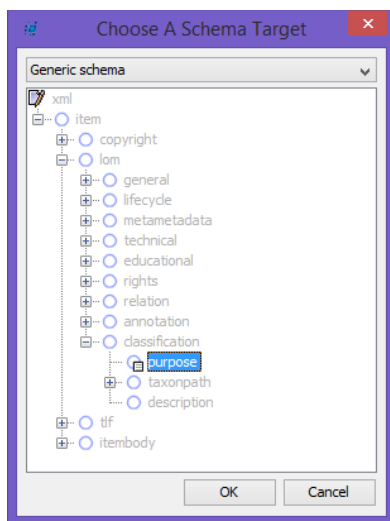
**Figure 29 Virtual topics page**

8. Select **Enable Dynamic Filtering**.
9. Click **Select...** next to the **Select the XPath of the field you wish to match the values against:** box. The **Choose A Schema Target** page displays, as shown in Figure 30.



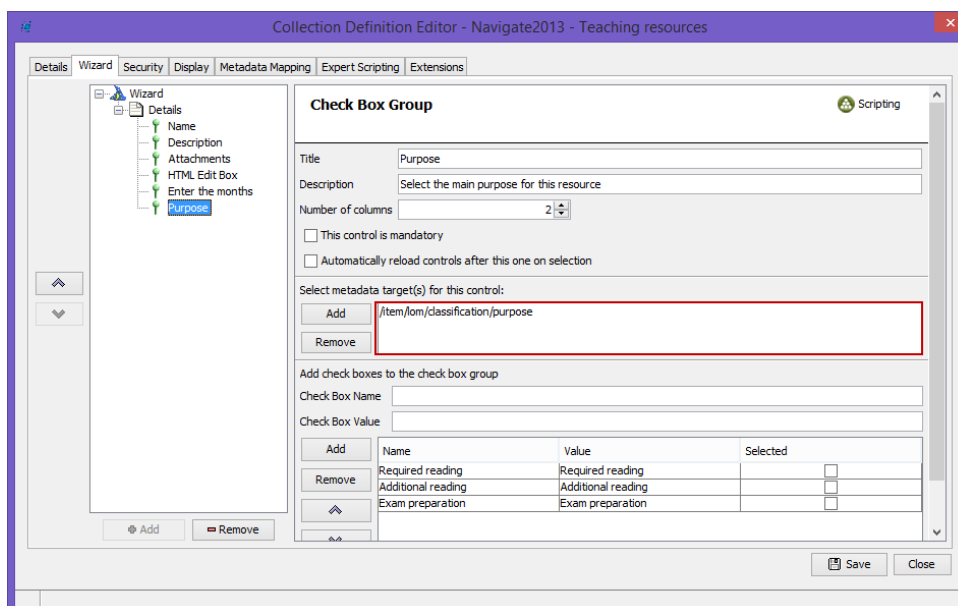
**Figure 30 Choose a schema target page**

10. Click the **Choose a schema** down arrow and select a schema (e.g. *Generic schema*) then navigate to the required node. (*NOTE: The node must have Index for Advanced Searches enabled. See EQUELLA Metadata Schema Configuration Guide for more information.*) An example is shown in Figure 31.



**Figure 31 Select schema node**

For uniform hierarchy topic creation, it is recommended that the node selected is associated with a selection-type control in the contribution wizard, such as a radio button group or check box group, where values are pre-defined. Use within an open-type control such as an edit box where users can create terms that are not unique may result in a hierarchy with many virtual topics with only one entry in each. An example of the contribution wizard control used in this example is shown in Figure 32.



**Figure 32 Contribution wizard control for resource purpose**

The user's view of this configured check box group in the contribution wizard is shown in Figure 33 . Selecting a value here writes the value to the XPath on submission and creates a new entry for the given subtopic in the hierarchy.

**Figure 33 Contribution wizard with control to specify resource purpose**

11. Click **OK**. The XPath displays, as shown in Figure 34.

**Figure 34 Virtual topic with XPath**

**Choose the source of the values:** options are:

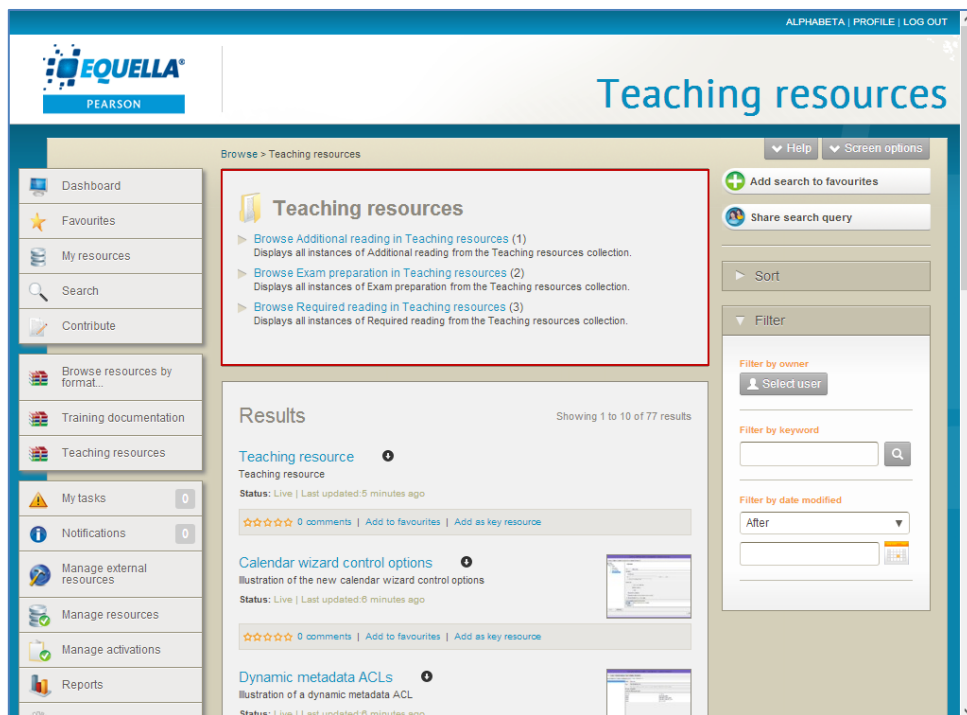
- **Contributed Resources**—Uses every value that has been contributed for the selected XPath.
- **Manually Entered List**—Restricts results to the XPath values specified in the list. When this option is selected, the ability to manually enter items into a list is enabled.

12. Select **Contributed Resources** then click **Save**.

13. Click **OK**.

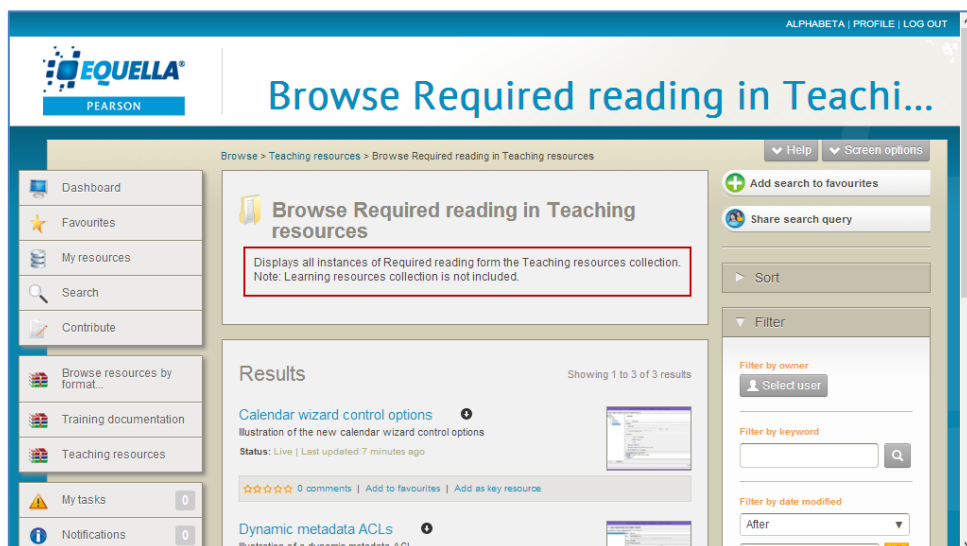
## Browsing virtual topics

Virtual topics are browsed in the same way as standard hierarchy topics. See [Accessing hierarchical browsing](#) on page 31 for more information. An example is shown in Figure 35.



**Figure 35 Virtual topic browsing results**

The subtopic names include the XPath values, as do the short descriptions. If the placeholder was also used in the full description, on selecting a subtopic, the full description also includes the XPath value, as shown in Figure 36.

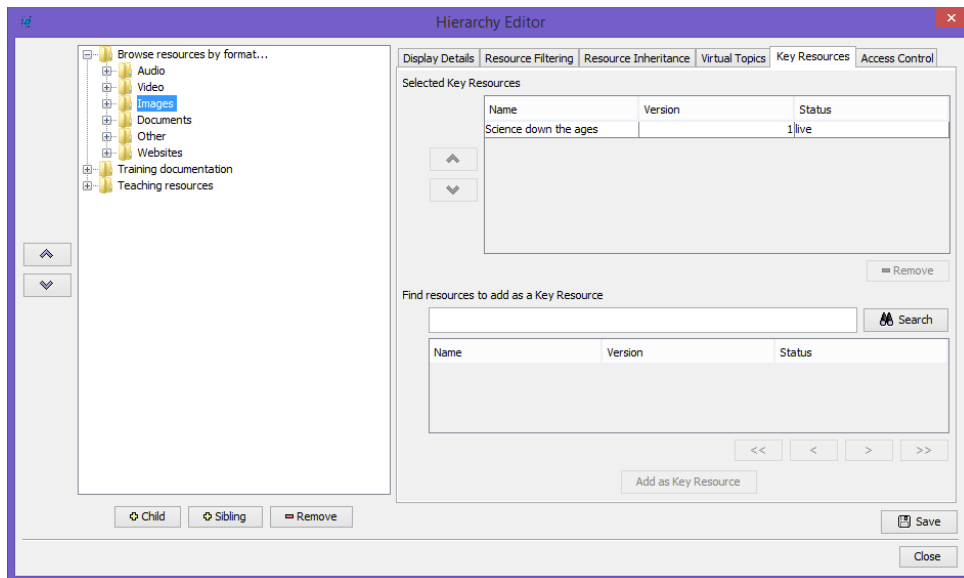


**Figure 36 Full description with XPath value**

## Key Resources tab

Key resources are important resources specific to a topic or subtopic (e.g. *general reference materials*, *course outlines* etc). An example of the Key Resources page is shown in Figure 37.





**Figure 37 Key resources page**



The Key Resources page elements include:

## Selected Key Resources

All resources currently selected to be key resources are listed in this section, with their version number and status.

Key resources can be rearranged to change the order in which they are displayed on the results page.

### To rearrange the order of the list

1. Use:
  - o  to move the selected resource above its neighbouring sibling.
  - o  to move the selected resource below its neighbouring sibling.


### To delete a key resource from the list

1. Select the relevant resource then click .

## Find resources to add as a Key Resource

This section provides a search facility to look for resources to add to the **Selected Key Resources** section.

### To search for resources

1. Enter search terms in the search bar (e.g. *equella*).
2. Click . An example is shown in Figure 38.

Find resources to add as a Key Resource

equella Search

Name	Version	Status
EQUELLA 6.0 Beta Documenta...		1 live
EQUELLA 6.1 Beta Phase I		1 live
EQUELLA 6.1 Beta Phase II		1 live
EQUELLA 6.1 Features Guide.pdf		1 live

Results 1 to 10 of 18

Add as Key Resource

**Figure 38 Search results**

Resources are listed with name, version number and resource status. If there are more than ten results, the page navigation arrows are enabled, allowing the user to scroll through the results list. Select the required resource (e.g. *Sample content – The Overland Track*) then click **Add as Key Resource**. The resource is added to the Selected Key Resources list as shown in Figure 39.

Display Details Resource Filtering Resource Inheritance Virtual Topics **Key Resources** Access Control

Selected Key Resources

Name	Version	Status
Science down the ages		1 live
EQUELLA 6.0 Beta Documenta...		1 live

Remove

Find resources to add as a Key Resource

equella Search

Name	Version	Status
EQUELLA 6.0 Beta Documenta...		1 live
EQUELLA 6.1 Beta Phase I		1 live
EQUELLA 6.1 Beta Phase II		1 live
EQUELLA 6.1 Features Guide.pdf		1 live

Results 1 to 10 of 18

Add as Key Resource

Save

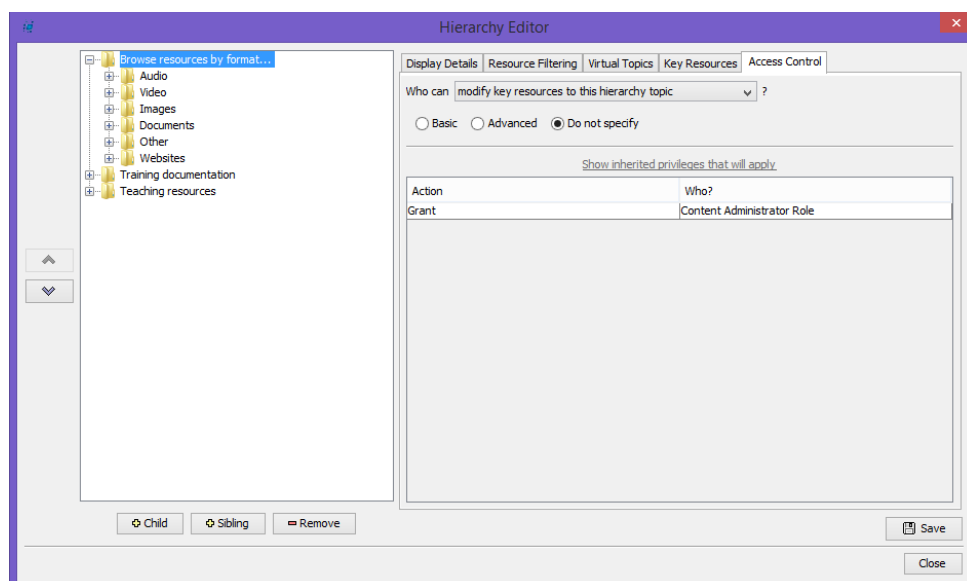
**Figure 39 Successful addition of key resource**

Selected resources are displayed at the top of the results list, and are highlighted. Please see [Viewing key resources](#) on page 35 for more information.

Key resources can also be added to or removed from hierarchy topics and subtopics from the resource Actions menu, search results pages and the hierarchy topic and subtopic results pages. Please see [Add key resources](#) on page 27 for more information.

## Access Control tab

Hierarchy topics can be configured to allow various security privileges to particular users, groups or roles. The **Access Control** page provides a way for administrators to determine which users, groups or roles are permitted access to particular topics or subtopics. An example is shown in Figure 40.



**Figure 40 Access Control page**

Hierarchy privileges can be applied to a particular hierarchy topic or subtopic in the Hierarchy Editor or the Security Manager, or at Institution level in the Security Manager.

The hierarchy topic privileges are:

- **MODIFY\_KEY\_RESOURCE**—if this privilege is granted to a user, group or role at Institution level, all hierarchy topics can have contributed resources added or removed as key resources. If granted on a specific hierarchy topic or subtopic, it applies to that topic or subtopic only, and will not be inherited by any of the child subtopics. This privilege is typically granted to an administrator and enables them to add a resource to a hierarchy as a key resource or remove a resource as a key resource from the resource Actions menu, hierarchy topic or subtopic results pages or a search results page.
- **EDIT\_HIERARCHY\_TOPIC**—if this privilege is granted to a user, group or role at Institution level, all hierarchy topics and subtopics can be edited. If granted on a specific hierarchy topic or subtopic, it applies to that topic and its child subtopics only. This privilege is inherited, meaning that if a hierarchy topic is editable by a given user, group or role, then all child subtopics will become editable by the user, group or role. This privilege is typically granted to an administrator.
- **VIEW\_HIERARCHY\_TOPIC**—if this privilege is granted to a user, group or role at Institution level, all hierarchy topics and subtopics are visible in the hierarchy. If it has been granted on a specific hierarchy topic, only those topics are displayed. If granted on a specific hierarchy topic or subtopic, it applies to that topic or subtopic only, and will not be inherited by any of the child subtopics.

Please see the *EQUELLA Security Manager Configuration Guide* for more information.

## Add key resources

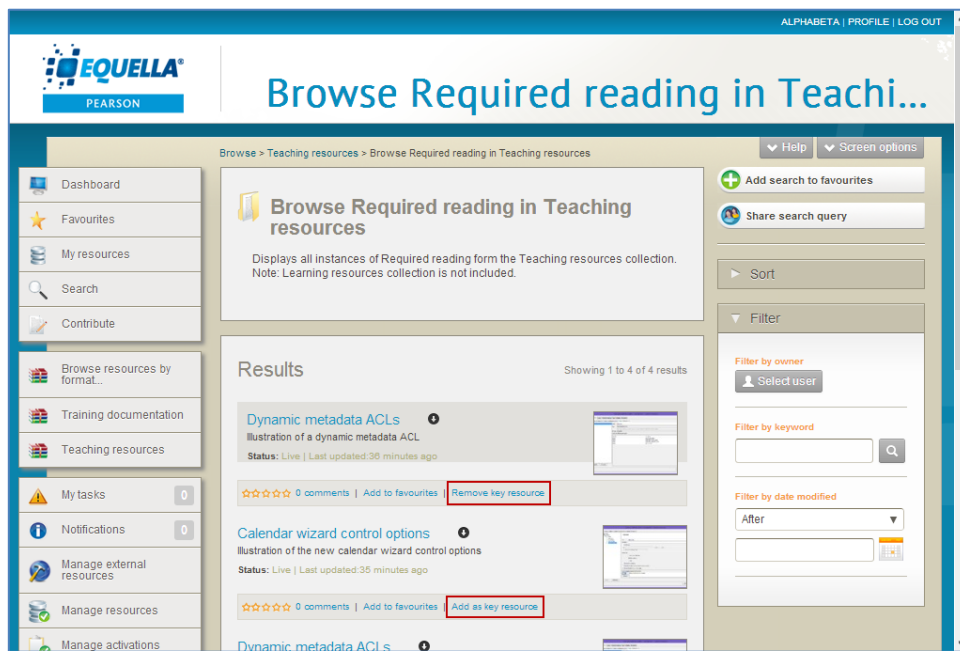
Key resources are important resources specific to a topic or subtopic (e.g. general reference materials, course outlines etc). When a resource is added as a key resource to

a hierarchy topic or subtopic, it displays at the top of the hierarchy results list. (See [Viewing key resources](#) on page 35 for further information.)

Resources can be added or removed as key resources to a hierarchy topic or subtopic from the hierarchy results page and the Actions menu. Resources can also be added to hierarchies from search results pages.

### To add or remove a key resource from a hierarchy topic or subtopic

1. Click on the required hierarchy topic, then select the required subtopic, if relevant. The hierarchy results page displays. An example is shown in Figure 41.

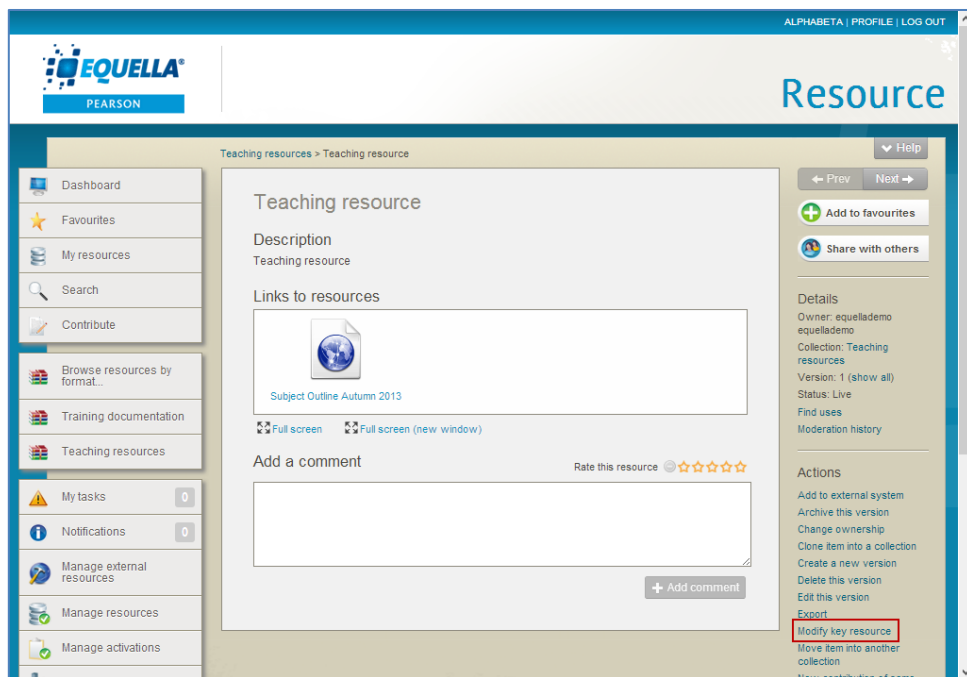


**Figure 41 Hierarchy topic results page**

2. Click the **Add as key resource** link to add a resource as a key resource for the selected topic or subtopic. If a resource has previously been added as a key resource, the link is **Remove key resource**. Click the link to remove the resource as a key resource from the selected topic or subtopic. Examples of the links are shown in Figure 41.

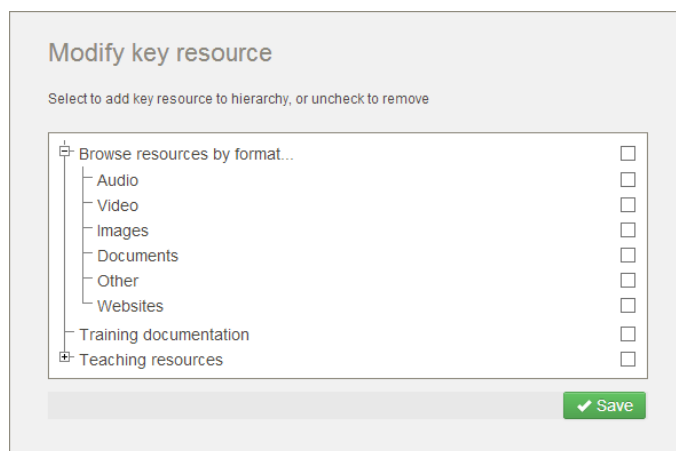
### To add or remove a key resource from the Actions menu

1. Search for and select the required resource. The resource summary page displays. An example is shown in Figure 42.




**Figure 42 Resource summary page**

2. Click the **Modify key resource** link from the Actions menu, as shown in Figure 42. The **Modify key resource** page displays, as shown in Figure 43.



**Figure 43 Modify key resource page**

3. Click on the plus sign  to expand the hierarchy tree and display any subtopics.
4. Select the checkboxes next to the hierarchy topics or subtopics (including dynamic subtopics) to which the resource is to be added as a key resource. Multiple checkboxes can be selected. An example is shown in Figure 44.

*NOTE: Hierarchy topics or subtopics where the selected resource already exists as a key resource display as checked when the **Modify key resource** page opens. Uncheck to remove the resource as a key resource.*

**Modify key resource**

Select to add key resource to hierarchy, or uncheck to remove

- ☐ Browse resources by format...
  - ☐ Audio
  - ☐ Video
  - ☒ Images
  - ☐ Documents
  - ☐ Other
  - ☐ Websites
- ☒ Training documentation
- ☒ Teaching resources
  - ☐ Browse Additional reading in Teaching resources
  - ☐ Browse Exam preparation in Teaching resources
  - ☐ Browse Required reading in Teaching resources

**Figure 44 Hierarchy topic and subtopic selection**

5. Click . A confirmation screen displays, as shown in Figure 45.

ALPHABETA | PROFILE | LOG OUT

**EQUELLA** PEARSON

Resource

Teaching resources > Teaching resource > Modify key resource

Successfully modified your key resource

**Modify key resource**

Select to add key resource to hierarchy, or uncheck to remove

- ☐ Browse resources by format...
  - ☒ Training documentation
  - ☒ Teaching resources

← Prev Next →

**Details**

Owner: equellademo  
equellademo

Collection: Teaching resources

Version: 1 (show all)

Status: Live

[Find uses](#)

[Moderation history](#)

**Actions**

[Add to external system](#)

[Archive this version](#)

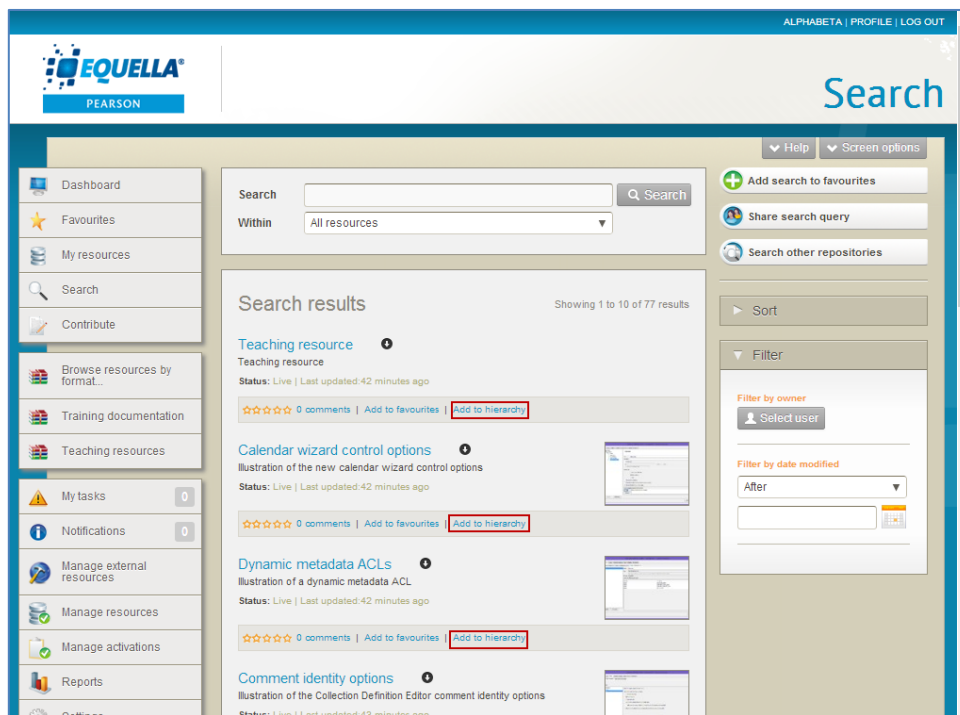
[Change ownership](#)

**Figure 45 Confirmation of Key resource modification**

The resources have now been added (or removed) as key resources for the selected hierarchy topics and/or subtopics. See [Viewing key resources](#) on page 35 for further information.

### To add a key resource from a search results page


1. Go to a search results page (e.g. Search page, My resources, Manage resources etc.). An example with the Search results page is shown in Figure 46.



**Figure 46 Search results page**

2. Click the **Add to hierarchy** link to open the **Modify key resource** page.
3. Select the checkboxes next to the hierarchy topics or subtopics (including dynamic subtopics) to which the resource is to be added as a key resource. Multiple checkboxes can be selected. An example is shown in Figure 44.

*NOTE: Hierarchy topics or subtopics where the selected resource already exists as a key resource display as checked when the **Modify key resource** page opens. Uncheck to remove the resource as a key resource.*

4. Click  **Save**. The resources are now added (or removed) as key resources for the selected hierarchy topics and/or subtopics. See [Viewing key resources](#) on page 35 for further information.

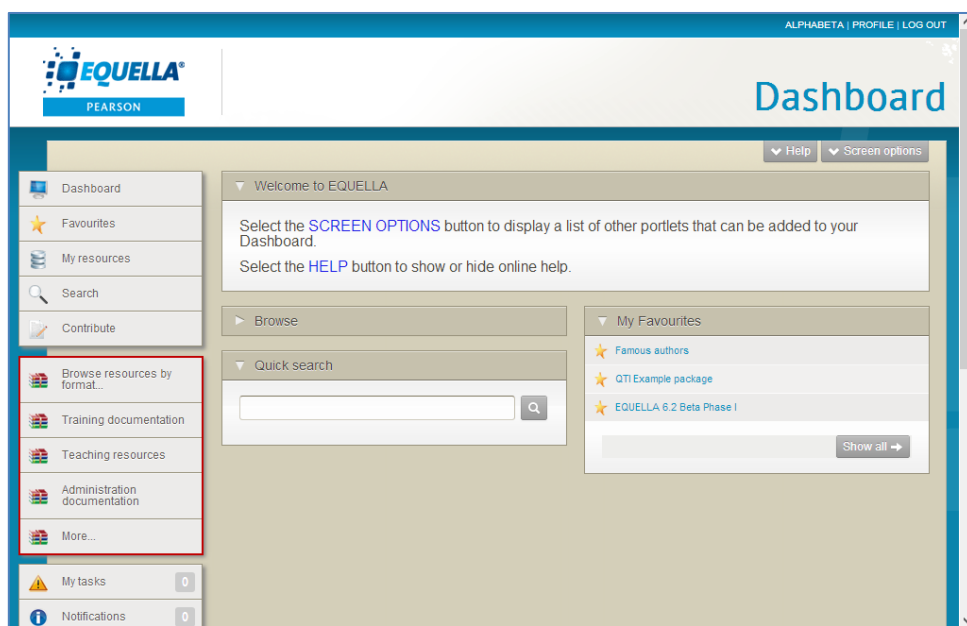
## Accessing hierarchical browsing

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

### Browsing using hierarchy topic links

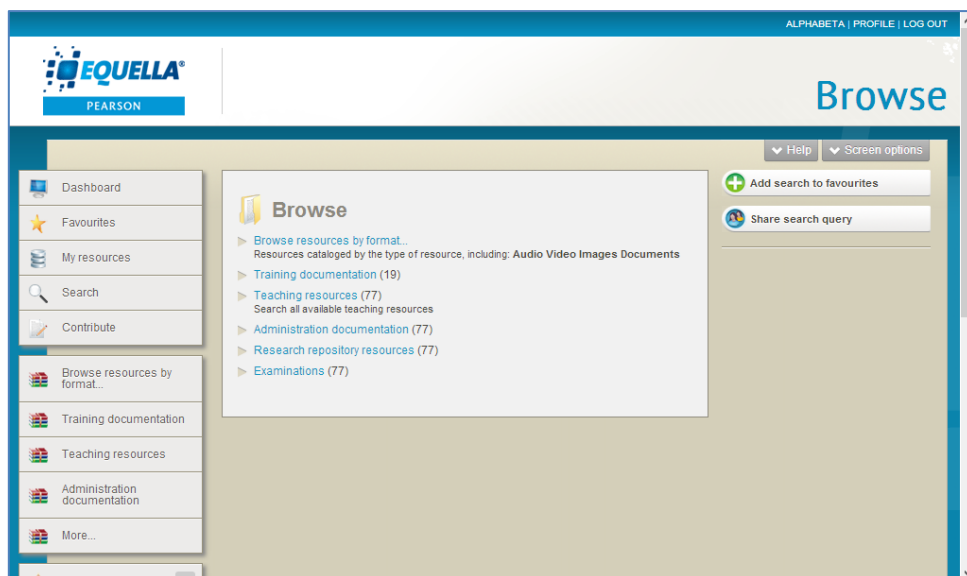
Hierarchy topic links display in a group on the left-hand navigation menu. Click on a link to display subtopics and results.

When six or more topics are added, the first four plus a **More...** link display. An example is shown in Figure 47.



**Figure 47 Hierarchy topic links**

Selecting the **More...** link displays the **Browse** page with a list of all hierarchy topics, as shown in Figure 48.



**Figure 48 Browse page from More... link**

Select a topic to display subtopics and results.

## ***Browsing using the Browse portlet***

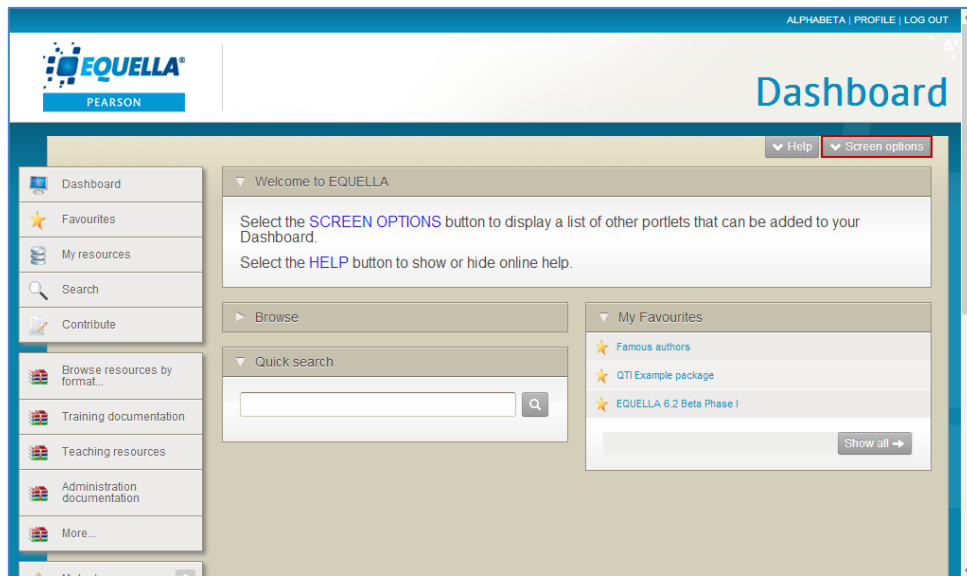
The EQUELLA Dashboard page can display multiple portlets including Browse, Favourites, Formatted text, My resources, Quick search, RSS or Atom feed, Recent contributions, Scripted, Task statistics, Tasks and Web page, depending on user privileges.



These portlets are configured by selecting Screen Options from EQUELLA Dashboard then selecting the required portlet.

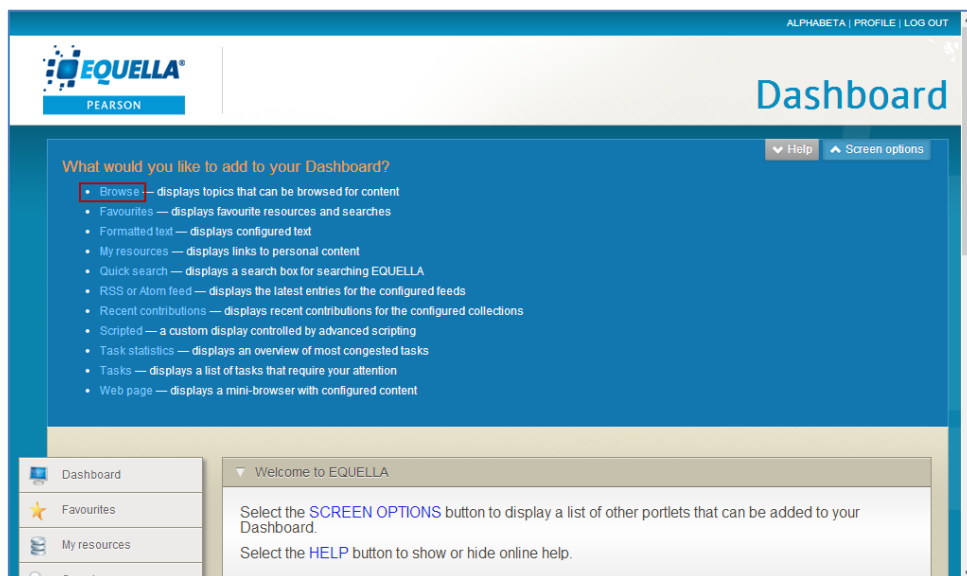
### To add a Browse portlet to the Dashboard

1. Select **Screen options** from the top right-hand corner of the Dashboard page. An example is shown in Figure 49.



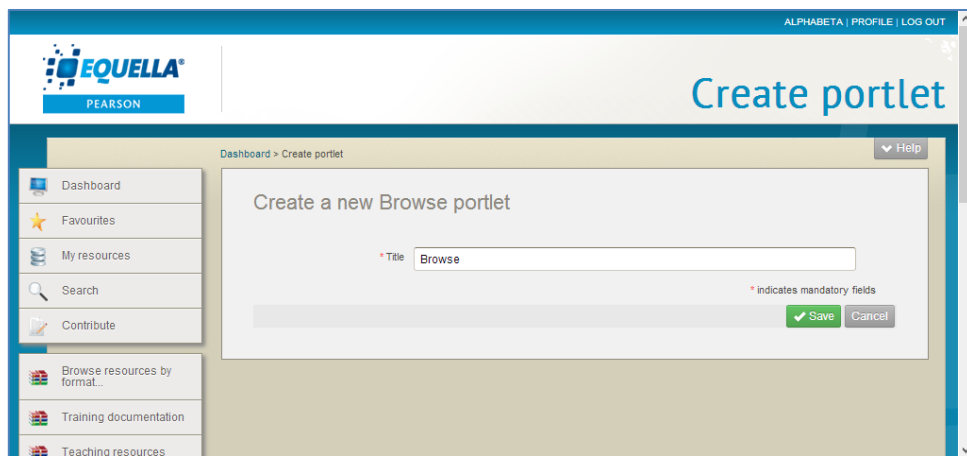
**Figure 49 Accessing screen options**

A list of available portlets displays. An example is shown in Figure 50.




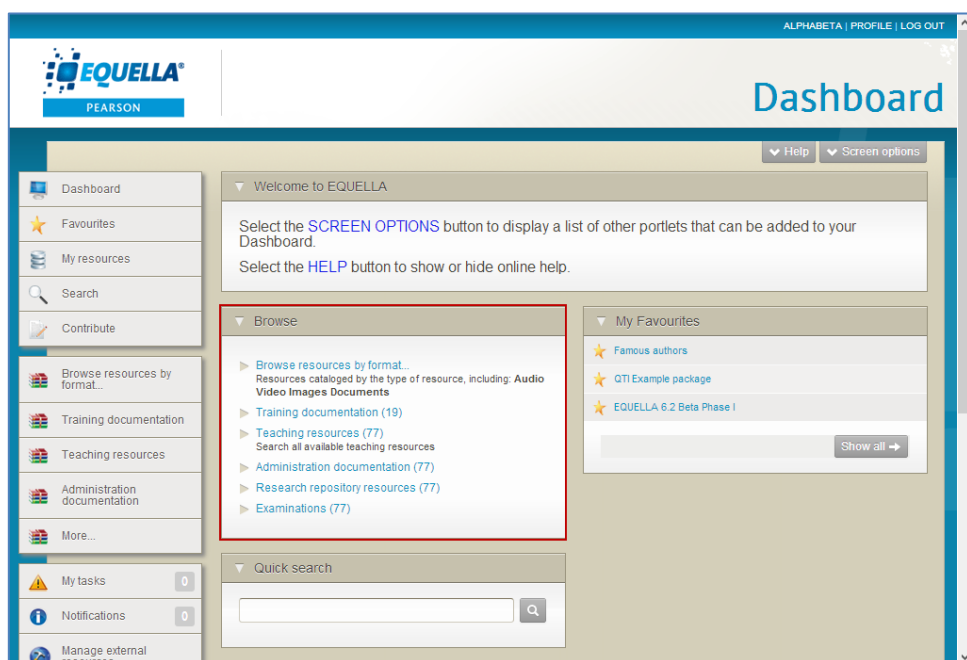
**Figure 50 Portlet list**

2. Click the **Browse** link to display the **Create a new Browse portlet** page, as shown in Figure 51.



**Figure 51 Create a new Browse portlet page**

3. The default Title is **Browse** but may be changed, if required.
4. Click . The **Browse** portlet now displays on the Dashboard page, as shown in Figure 52.



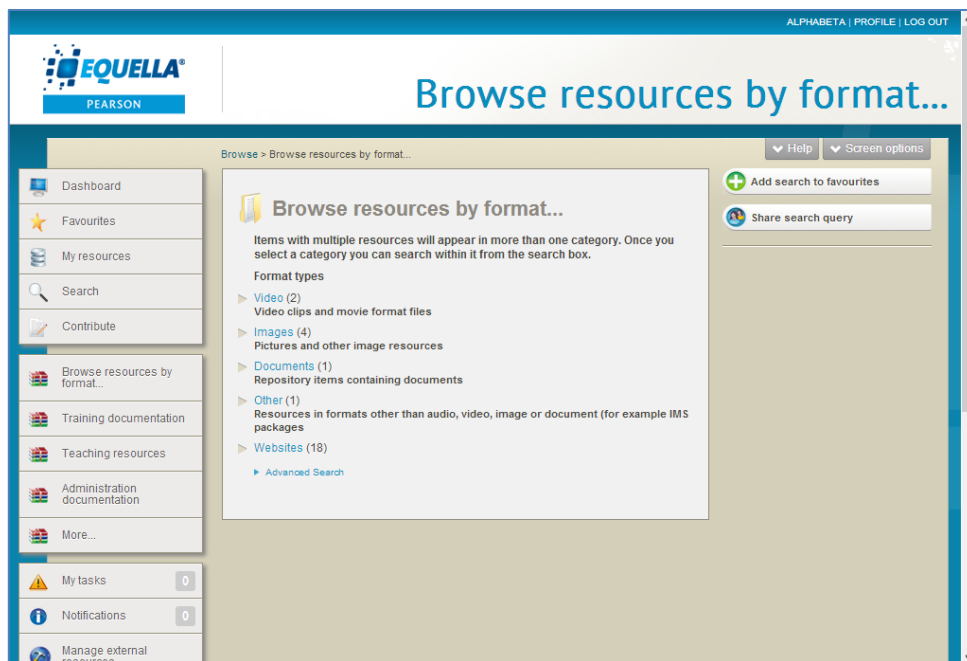
**Figure 52 Dashboard with Browse portlet**

Select a topic to display subtopics and results.

## Displaying subtopics and results

Once a topic is selected, any subtopics are displayed. Results may also display at this point, depending on how the hierarchy has been configured. Some hierarchies may require a subtopic to be selected before any results display. See [Display resources for this topic](#) on page 13 for further information.

An example of a hierarchy where only subtopics display is shown in Figure 53.

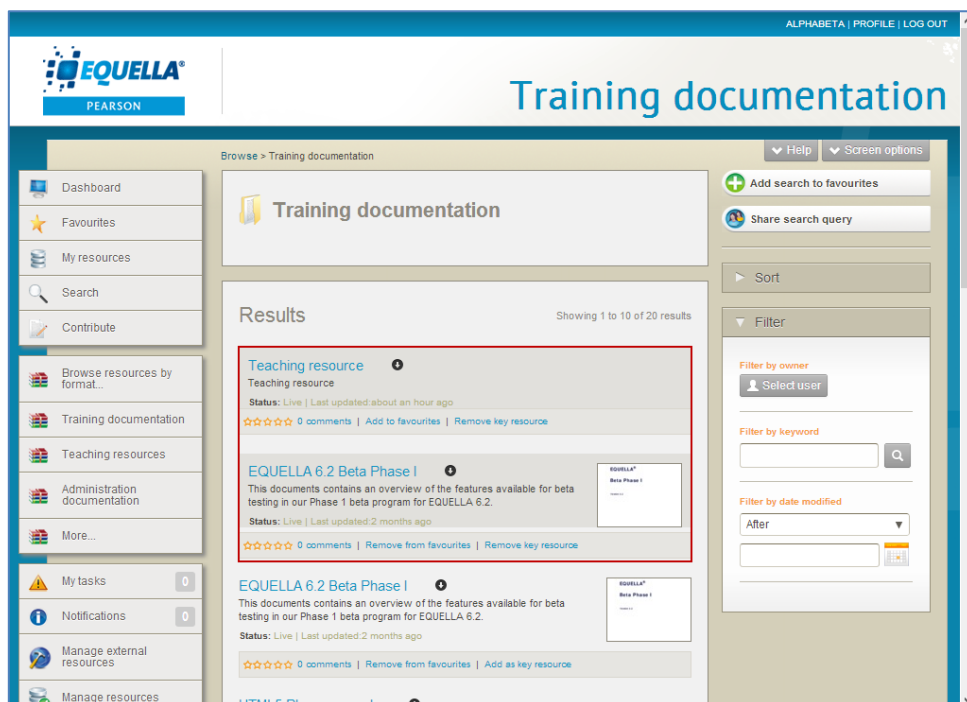


**Figure 53 Hierarchy with subtopics and no results**

Select a subtopic to display results.

## Viewing key resources

Key resources are important resources added to a hierarchy, and are always highlighted and displayed at the top of hierarchy results. An example is shown in Figure 54.



**Figure 54 Viewing key resources**

To add key resources to a hierarchy, see [Key Resources tab](#) on page 24 and [Add key resources](#) on page 27.

## Contact Client Support

We are always happy to help.

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