

**EQUELLA<sup>®</sup>**

# Taxonomies Guide

*Version 6.0*

## Document History

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## Table of Contents

Taxonomies guide .....	4
Taxonomies tool .....	4
Configure a taxonomy .....	4
To access EQUELLA and open the Administration Console .....	4
Add a taxonomy .....	7
Use SOAP to upload terms .....	14
Taxonomies during contribution .....	15
Contact Client Support .....	19

# Taxonomies guide

EQUELLA provides a taxonomy engine that is scalable to facilitate taxonomies with very large numbers of hierarchical terms. Terms can be configured to contain HTML fragments or custom data keys, and can be selected during resource contribution, or when power searching, through browsing to a target or by searching the list of terms.

The purpose of this guide is to provide system administrators and content creators with an understanding of the EQUELLA Taxonomies tool to enable successful taxonomy creation and management.

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. Where possible the examples in this guide use the schemas, collections, contribution wizards and power searches provided in the *EQUELLA Vanilla Institution*. Information on institution management is provided in the *EQUELLA Installation and Administration Guide*.

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## Taxonomies tool

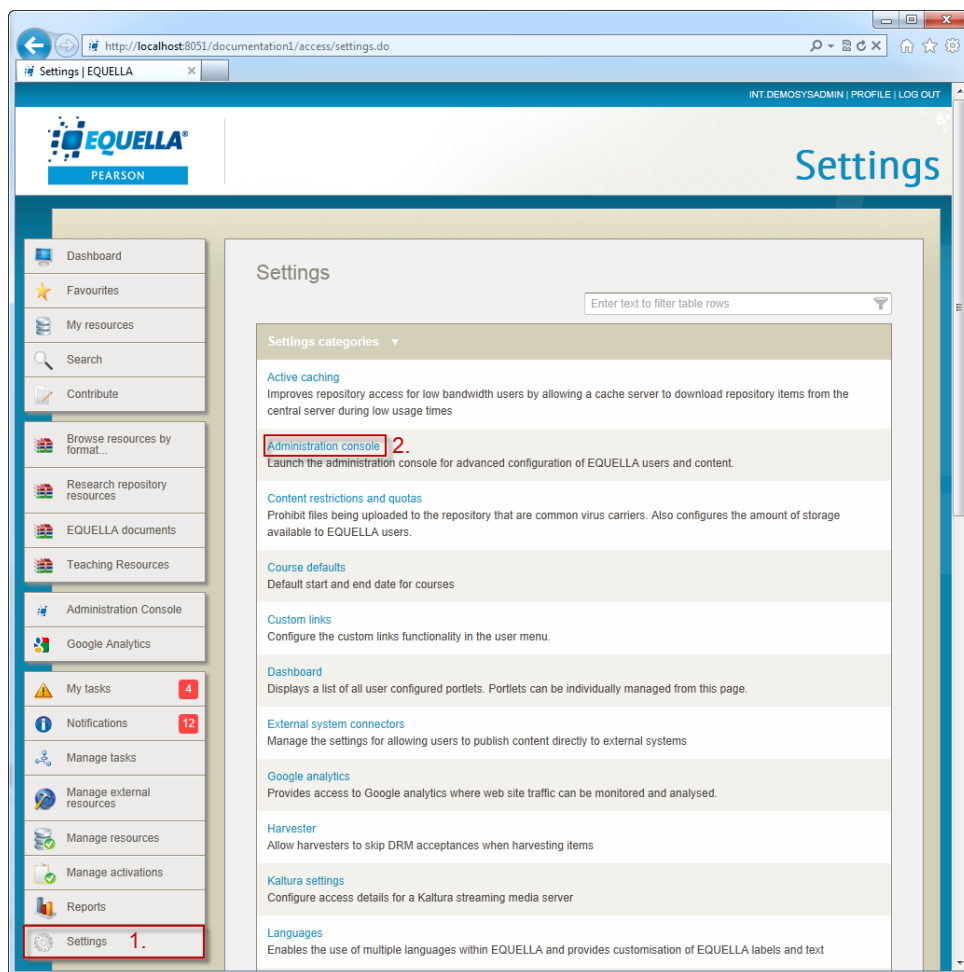
The Taxonomies tool enables the creation of taxonomies to a large size via manual addition of local terms or referral from a SQL data source. For mass addition of terms, it is possible to define taxonomies programmatically using the EQUELLA SOAP interface.

## Configure a taxonomy

Taxonomies are created, modified and removed using the **Taxonomies** tool, available in the **Administration Console**.

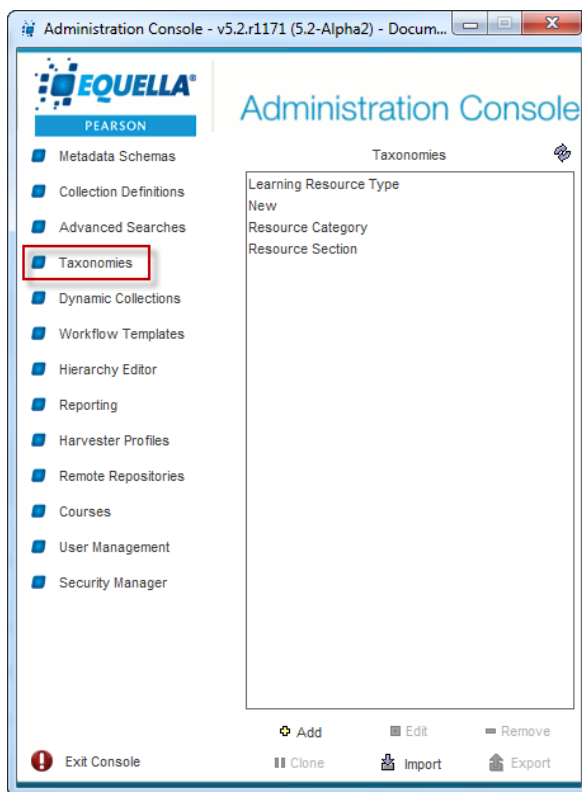
### *To access EQUELLA and open the Administration Console*

1. Open a browser and enter your EQUELLA URL (e.g. 'http://equella.myinstitution.edu/institution').
2. Log in to EQUELLA as an administrator, select **Settings** then **Administration console**, as shown in Figure 1.



**Figure 1 Settings page—Administration Console**

3. The **Administration Console** displays. Select **Taxonomies** as shown in Figure 2.




**Figure 2 Administration Console—Taxonomies**

The Taxonomies page displays, showing a list of all previously configured taxonomies.


## Administration Console elements

When a taxonomy has been highlighted the **Add**, **Edit**, **Remove**, **Clone**, **Import** and **Export** buttons are enabled. (Providing the correct privileges have been granted. Refer to the *EQUELLA Security Administration Guide* for further information.)

### Add

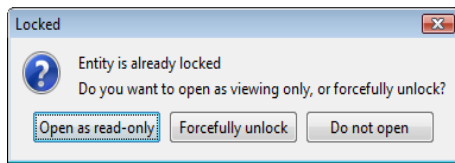
Click  **Add** to display the **Taxonomy Editor** and create a new taxonomy. See [Add a taxonomy](#) on page 7 for more information.

### Edit

Select a taxonomy then click  **Edit** (or double-click a taxonomy name) to display the **Taxonomy Editor** and modify the selected taxonomy.


If the selected taxonomy is being edited by another user, a **Locked** dialog is displayed as shown in Figure 3, providing the following options:

- **Open as read-only**—disables the **Save** button so that no changes can be made.
- **Forcefully unlock**—unlocks the entity from the previous owner. Editing is possible but changes by other users may be lost.
- **Do not open**—the configuration screen will not be opened.




**Figure 3 Locked entity dialog**


## Remove

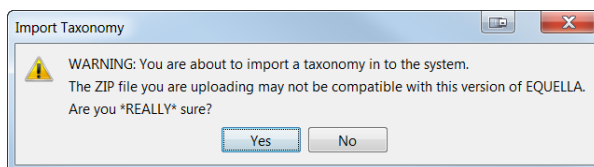
Click  **Remove** to delete the selected taxonomy.

## Clone

Click  **Clone** to copy an existing taxonomy. The cloned taxonomy can then be modified by selecting the **Edit** button.


## Import

Click  **Import** to import a taxonomy that has previously been exported from the Administration Console. A warning dialog is displayed as shown in Figure 4. (*NOTE: Only ZIP files that have been exported from the Administration Console should be imported—other ZIP files may adversely affect the stability of the system.*)




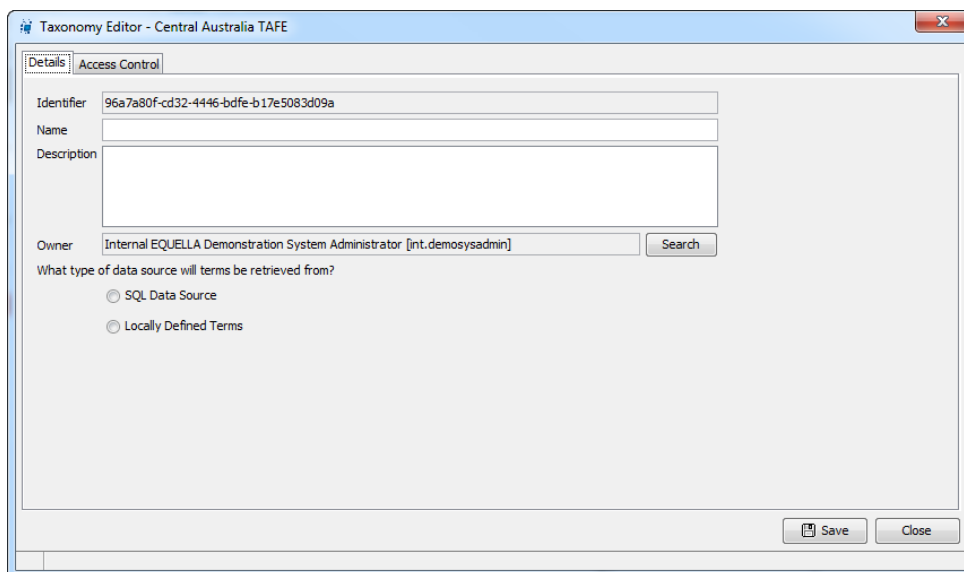
**Figure 4 Import Taxonomy warning dialog**

## Export


Click  **Export** to export a taxonomy as a ZIP file.

## Add a taxonomy

1. Click  **Add** on the Administration Console to display the **Taxonomy Editor**. An example is shown in Figure 5.



**Figure 5 Taxonomy Editor—Details page**

2. The only mandatory fields that must contain values prior to saving a taxonomy are the **Name** and the **Data Source**. At this point it is possible to simply provide a name, select either data source option, and click  to create a valid taxonomy. Further configuration is required to provide the taxonomy with any function, and these options are described below.

The Taxonomy Editor provides an interface for taxonomy creation with the following tabs:

- **Details**
- **SQL Details**
- **Terms**
- **Access Control**

Each tab is described in the following sections.

## Details tab

The **Details** page displays the taxonomy's general details such as UUID, name, description and owner. An example is shown in Figure 6.



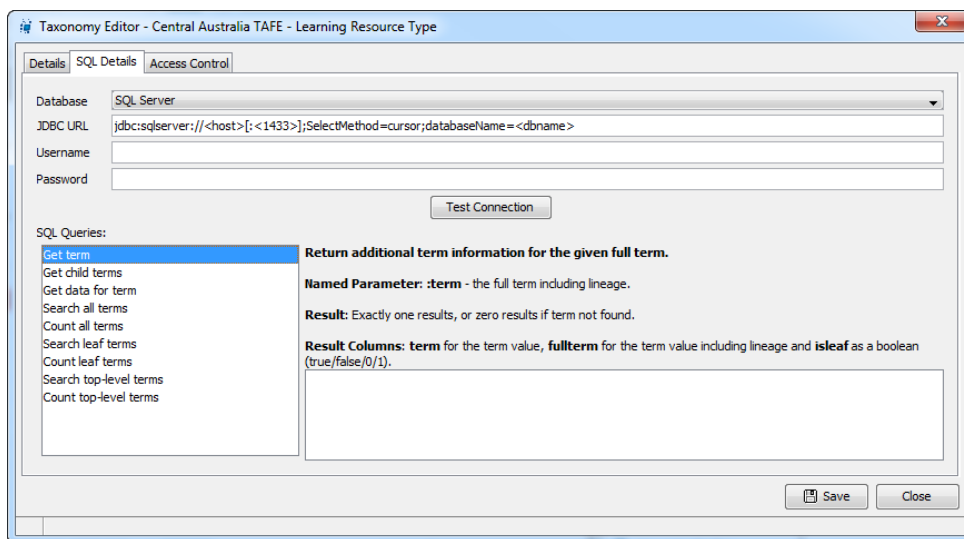
**Figure 6 Taxonomy Editor—Details tab**

The configurable Details page elements include:

- **Name**—enter or edit the name of the taxonomy. This name (e.g. *Learning Resource Type*) is displayed as the *<taxonomy name>* in the **Term Selector** control. An example is shown in Figure 15.
- **Description**—enter or edit the taxonomy's description.
- **Owner**—displays the owner of the taxonomy; the default owner is the creator of the taxonomy. Click  to choose a new owner from available users.
- **Data Source**—select the data source for the taxonomy terms:
  - **SQL Data Source**—to query a database for terms associated with this taxonomy. A **SQL Details** tab, shown in Figure 7 is enabled.
  - **Locally Defined Terms**—to define and manage terms associated with this taxonomy. A **Terms** tab, shown in Figure 11 is enabled. The taxonomy must have a name and be saved before terms can be added.
- **Allow end-users to add new terms during contribution**—check to allow users to add new terms to the taxonomy when they are contributing resources.

## SQL Details tab

The **SQL Details** tab provides a flexible method for creating SQL queries to search a database and return terms for populating the taxonomy. An example is shown in Figure 7.



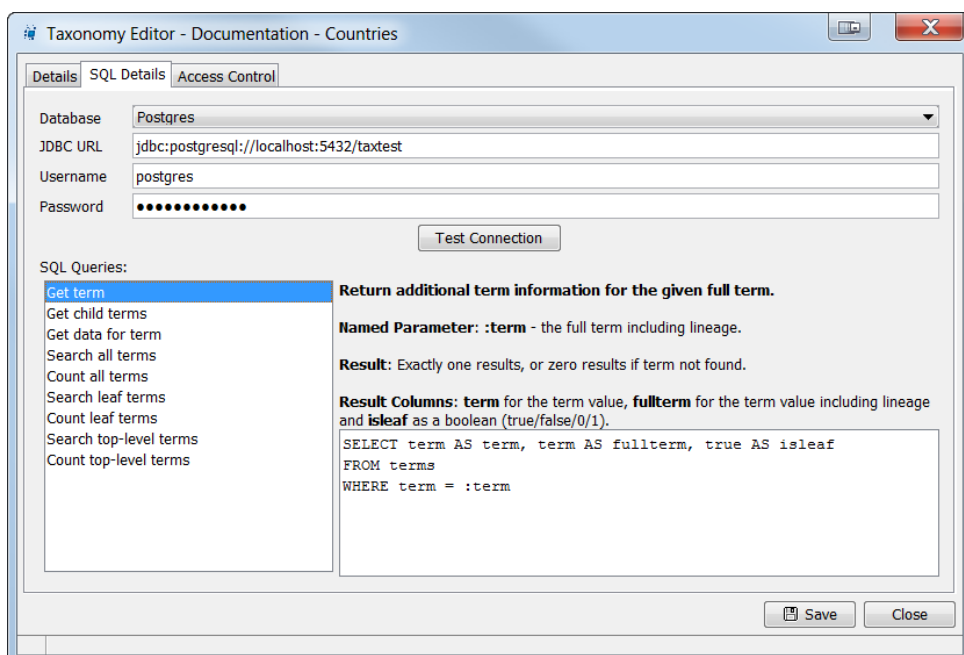
**Figure 7 Taxonomy Editor—SQL Details tab**

The supported databases are:

- Oracle™ 9i, 10g and 11g
- Microsoft SQL Server™ 2005 and 2008
- PostgreSQL™ 8.0 or higher

Database connection details depend on the database being used; selecting the database from the **Database** drop-down list populates the **JDBC URL** fields with default templates for each of the supported databases.

The **JDBC URL** templates require the values enclosed in <angle brackets> to be added, while the values in [square brackets] are optional values required by some systems. An example is shown in Figure 8.



**Figure 8 SQL Details tab—Get term query**

The configurable SQL Details page elements include:

- **Username**—enter the username for the connection. This user will need permissions to access the database and run the SQL queries that retrieve user data.
- **Password**—enter the password for the entered username.
- **Test Connection**—click the button to check the connection.

The **SQL Queries** are associated with terms by mapping database queries to the taxonomy. Example SQL queries are shown in Figure 8, Figure 9 and Figure 10.

The function and syntax of each query type is described according to the selected query type on the **SQL Details** page, above the query text area.

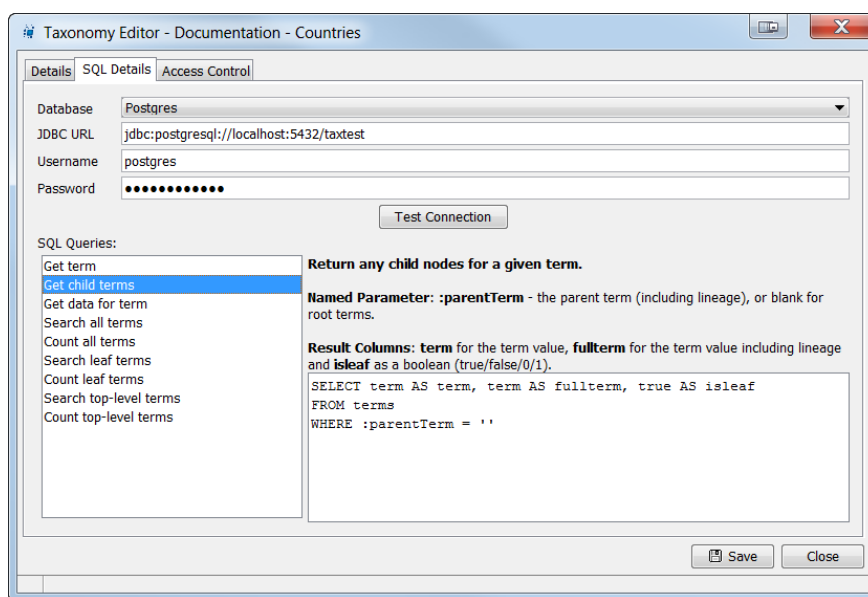


Figure 9 SQL Details tab—Get child terms query

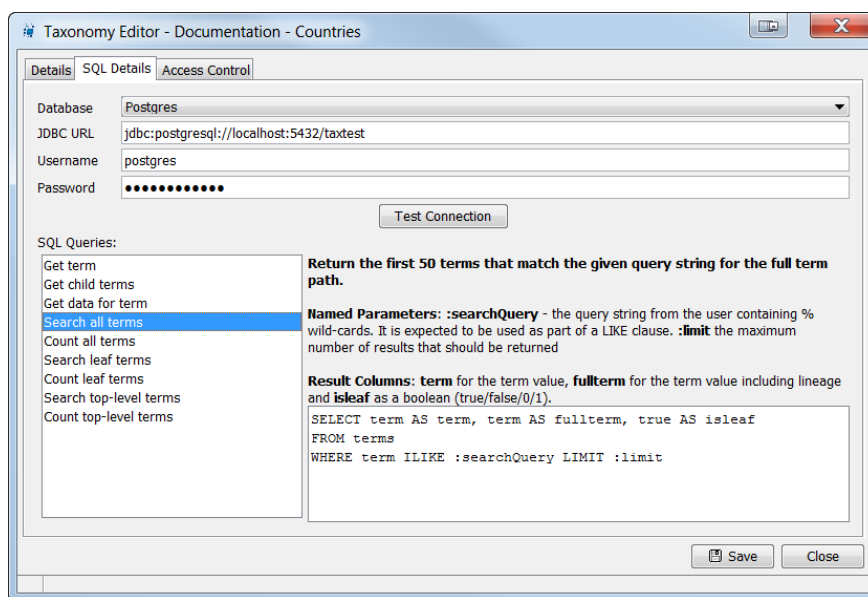
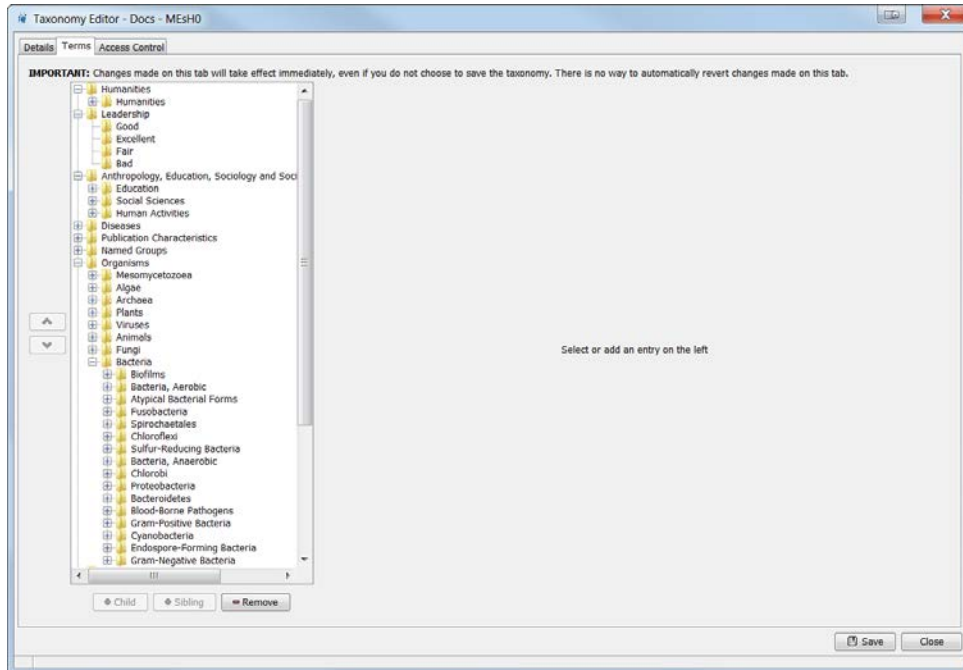


Figure 10 SQL Details tab—Search all terms query




## Terms tab

The **Terms** tab enables terms for the taxonomy to be defined and managed. An example is shown in Figure 11.

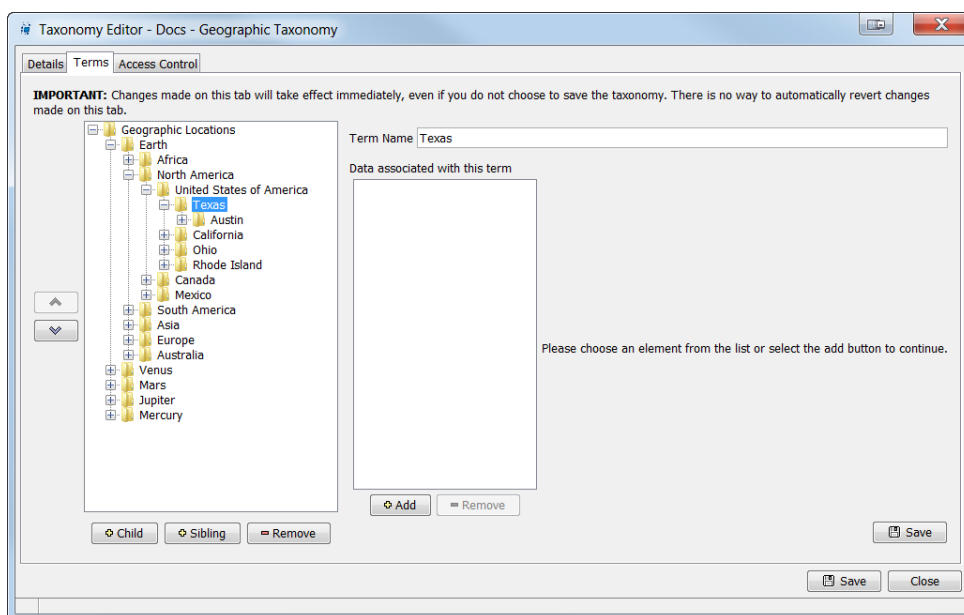


**Figure 11 Taxonomy Editor—Terms tab**

The configurable Terms page elements include:

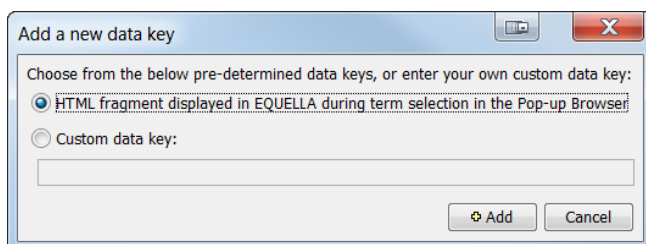
-  **Child**—clicking the button, entering a name in the **Input** dialog then clicking the **OK** button adds a sub-element term to the selected term in the taxonomy.
-  **Sibling**—clicking the button, entering a name in the **Input** dialog then clicking the **OK** button adds a new element term at the same level as the selected term in the taxonomy.
-  **Remove**—clicking the button removes the selected term from the taxonomy.

Adding or selecting a term (e.g. *Mid-Year*) in the tree displays its name and a details section. An example is shown in Figure 12.



**Figure 12 A taxonomy term with details section**

Data associated with the term can be added by clicking the **Add** button to display an **Add a new data key** dialog shown in Figure 13.

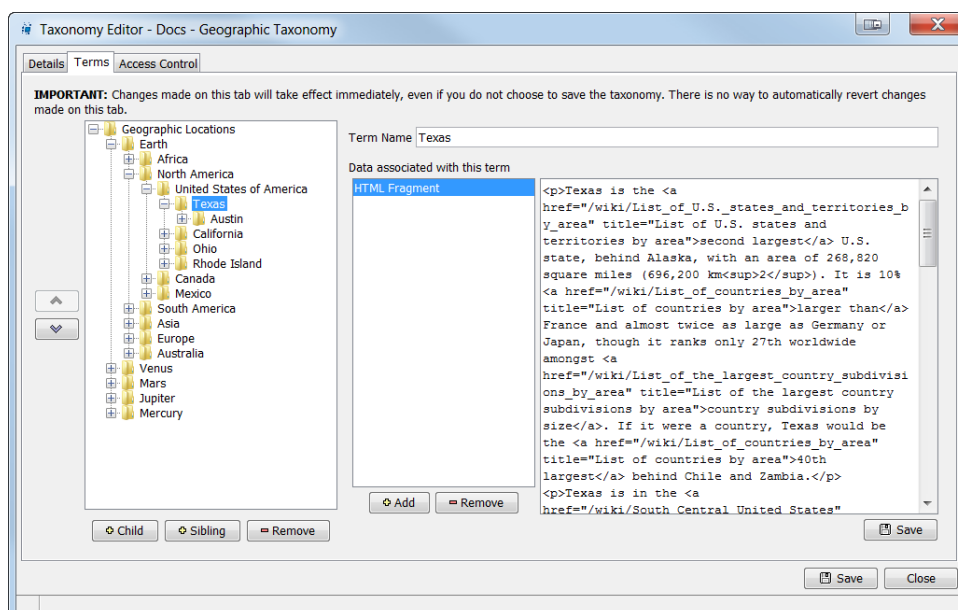


**Figure 13 Add a new data key dialog**

Pre-determined or custom keys can be selected including:

- **HTML fragment displayed in EQUELLA**—select this option to add pre-determined HTML.
- **Custom data key**—select this option to specify custom values.

When a data key option is selected, clicking **Add** closes the dialog to return to the **Terms** tab, displaying an editor where the fragment or custom value can be added, edited, removed and saved.



**Figure 14 A taxonomy term with an HTML fragment added**

Figure 14 shows the term (e.g. *Texas*) as it is displayed to a user during the contribution process.

(NOTE: Any changes made on the Terms page will have an immediate impact even if they are not saved.)

## Access Control tab

The **Access Control** tab allows taxonomies to be restricted to a set of users, groups or roles.

The three privileges for taxonomies are:

- **CREATE\_TAXONOMY** = create a taxonomy.
- **DELETE\_TAXONOMY** = delete this taxonomy.
- **EDIT\_TAXONOMY** = edit this taxonomy.

Further information on these privileges is provided in the *EQUELLA Security Administration Guide*.

## Use SOAP to upload terms

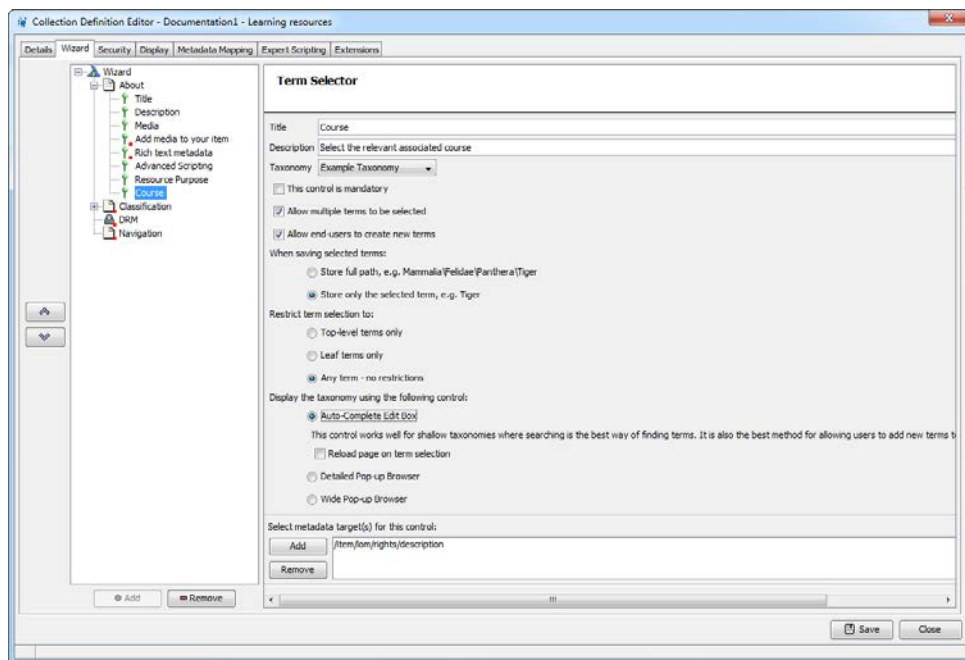
Administrators can programmatically add a large number of additional terms to an existing taxonomy stored in EQUELLA via the available SOAP methods in the EQUELLA AP. The SOAP methods require a unique identifier to access the taxonomy; this can be retrieved by copying-and-pasting the UUID from the **Identifier** field on the **Details** tab of the **Taxonomy Editor**.

Further information on available SOAP methods is provided in the Javadoc in the *EQUELLA Integration Pack*, available from the Downloads page of your EQUELLA Institution Manager.

## Taxonomies during contribution

After a taxonomy has been successfully created, it becomes possible to incorporate it into the wizard of an Advanced Search or Collection Definition, using the **Term Selector** control. Created taxonomies contain a list of terms that can be selected to use during contribution or when performing a power search.

Contribution Wizards are configured in the EQUELLA **Administration Console** by selecting the **Collection Definitions** tool. **Term Selector** wizard controls are added in the **Wizard** tab. An example is shown in Figure 15.



**Figure 15 Collection Definitions Editor—Term Selector**

See the *EQUELLA Wizard Configuration Guide* for more information.

The configurable Term Selector control elements are:

- **Title**—enter a title name for the control.
- **Description**—enter a description that describes the control itself or how to use it.
- **Taxonomy**—select a taxonomy that has previously been configured in the **Taxonomies** tool in the Administration Console (e.g. *Geographic Taxonomy*).
- **This control is mandatory**—check this box to force users to enter data in the associated control before the wizard can be completed.
- **Allow multiple terms to be selected**—check this box to allow more than one selection from the list during contribution.
- **Allow end-users to create new terms**—check this box to allow users to add terms, if they do not already exist, to the selected taxonomy during contribution. (*NOTE: The same option on the Details tab of the Taxonomy Editor also needs to be checked to allow this functionality.*)
- **When saving selected terms**—select to store the term as:

- full path (e.g. Mammalia\Felidae\Panthera\Tiger); or
- individual term (e.g. *Tiger*).
- **Restrict item selection to**—select an option to control the type of term selected.
- **Display the taxonomy using the following control**—select the type of control to display in the contribution wizard:
  - **Auto-Complete Edit Box**—select to display an edit box that will automatically complete an entered term. This is the best option to select if allowing users to add new terms to a taxonomy during contribution. See the [Auto-Complete Edit Box](#) section on page 16.
  - **Detailed Pop-up Browser**—select to display a modal dialog that allows users to browse or search for terms. See the [Detailed Pop-up Browser](#) section on page 17.
  - **Wide Pop-up Browser**—select to display a modal dialog with a wide screen to display very long taxonomies. See the [Wide Pop-up Browser](#) section on page 17.
- **Select metadata target(s) for this control**—select a metadata target or storage area for entered data.

## Auto-Complete Edit Box

Selecting **Auto-Complete Edit Box** as the display type for a **Term Selector** control displays an edit box alongside a **SELECT** button in the contribution wizard. Entering search term(s) then clicking **SELECT** displays a list of matching terms. An example is shown in Figure 16.

The screenshot shows a 'Course' section with the instruction 'Select the relevant associated course'. Below this is a search box containing the text 'autd'. To the right of the search box is a 'SELECT' button. A list of search results is displayed below the search box. The first result is highlighted in yellow: 'AUTM 190 AURT216170A Inspect and service suspension systems (Level 2) - Automotive, Metals and Logistics\C2-2J98 Certificate II in Automotive Mechanical AUR20705 with specialisations in Tyre Fitting Light, Steering and Suspension, Cooling Systems and Air Conditioning'. Other results include 'Automotive, Metals and Logistics - Automotive, Metals and Logistics' and 'C2-2J98 Certificate II in Automotive Mechanical AUR20705 with specialisations in Tyre Fitting Light, Steering and Suspension, Cooling Systems and Air Conditioning'.

**Figure 16 Contribution wizard with an Auto-Complete Edit Box**

Selecting a term and clicking **SELECT** adds the term to the list in the contribution wizard. An example is shown in Figure 17.

The screenshot shows the same 'Course' section. The search box is now empty. The 'SELECT' button is still present. The list of search results now shows the selected term: 'C2-2J98 Certificate II in Automotive Mechanical AUR20705 with specialisations in Tyre Fitting Light, Steering and Suspension, Cooling Systems and Air Conditioning'. A small 'x' icon is visible next to the selected term.

**Figure 17 Term selected**



## Detailed Pop-up Browser

When this option is selected, the Term Selector control displays a **Select terms** link in the contribution wizard that opens a Pop-up browser with two panes. The left-hand pane displays the taxonomy tree, and each term has a **Select** and **View** link. When the **View** link is selected the details of the term displays in the right-hand pane. An example is shown in Figure 18.

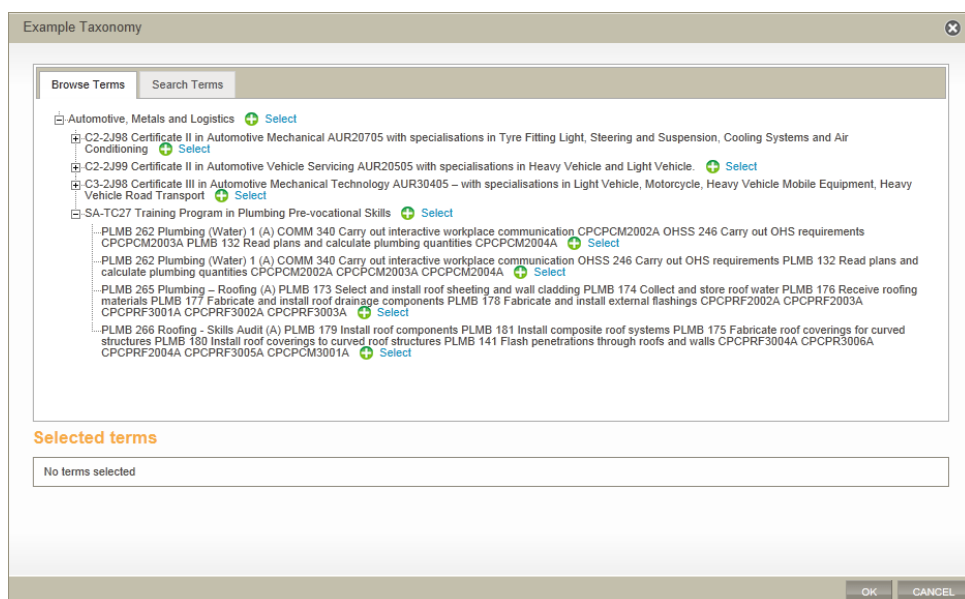


**Figure 18** User's view of Term selector with Detailed Pop-up Browser

Use the **Select** link or the **SELECT THIS TERM** button to select a term.

## Wide Pop-up Browser

Select to display a modal dialog that allows users to browse or search for terms. This is similar to the Detailed Pop-up Browser except it doesn't have the right-hand pane for taxonomies, providing a wide screen to display very long taxonomy terms. Checkbox options to **Allow users to navigate the taxonomy by** either *Searching*, *Browsing*, or both, are provided when this option is selected. An example is shown in Figure 19.

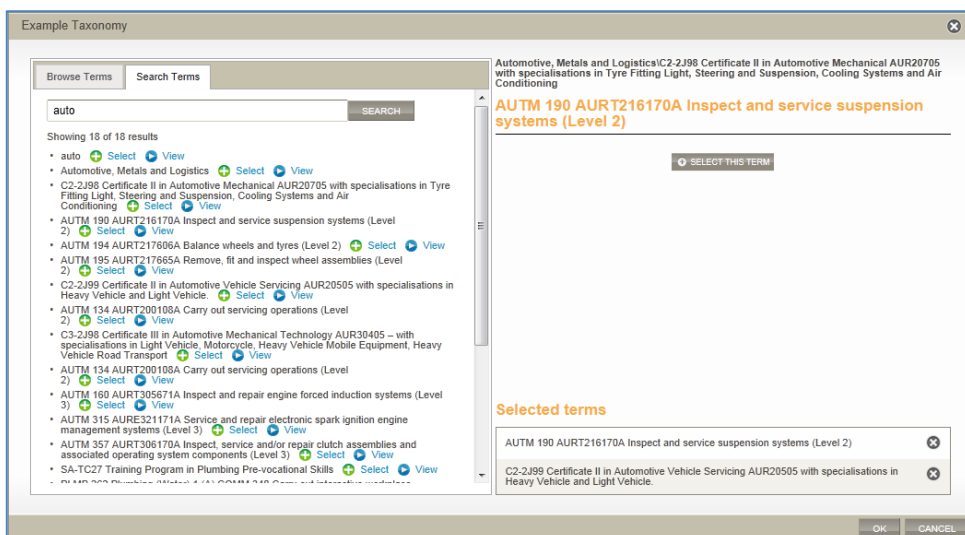


**Figure 19 User's view of Term selector Wide Pop-up browser**

Click the **Select** link to select a term.

## Search Terms tab

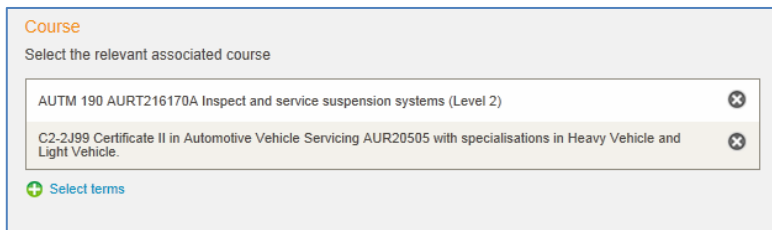
The Search Terms tab on the Detailed and Wide Pop-up Browsers allows the user to search for the required terms. Entering search term(s) and clicking **SEARCH** displays a list of matching terms. Selecting a term and clicking **SELECT THIS TERM** adds the term to the **Selected terms** section. An example is shown in Figure 20.



**Figure 20 Search Terms page**

Terms can be removed from the **Selected terms** section by clicking **X**.

Clicking **OK** adds the terms to the **Contribution wizard** as shown in Figure 21.




The screenshot shows a web interface titled 'Course' with the instruction 'Select the relevant associated course'. Below this is a list of two courses, each with a small 'x' icon in a square to its right for removal. The first course is 'AUTM 190 AURT216170A Inspect and service suspension systems (Level 2)'. The second course is 'C2-2J99 Certificate II in Automotive Vehicle Servicing AUR20505 with specialisations in Heavy Vehicle and Light Vehicle.'. At the bottom of the list is a green plus icon followed by the text 'Select terms'.

Course	Remove
AUTM 190 AURT216170A Inspect and service suspension systems (Level 2)	x
C2-2J99 Certificate II in Automotive Vehicle Servicing AUR20505 with specialisations in Heavy Vehicle and Light Vehicle.	x

+ Select terms

**Figure 21 Contribution wizard with selected terms**

Terms can be removed by clicking .

See the *EQUELLA Contribution User Guide* for more information.

## Contact Client Support

We are always happy to help.

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