

EQUELLA®

Collection Definition Editor Configuration Guide

Version 6.3

Document History

| Document No. | Reviewed | | Finalised | | Published | |
|--------------|------------|--|------------|--|------------|--|
| 1 | 18/08/2014 | | 23/09/2014 | | 23/09/2014 | |

November 2014 edition.

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Collection definitions overview

An EQUELLA collection represents a unique container to store items within the EQUELLA Digital Repository. Each collection comprises a contribution wizard and an associated metadata schema, and can also include a workflow definition, access control rights, display template rules, copyright and digital rights management (DRM) controls. Collections are created and edited in the EQUELLA Administration Console **Collection Definition Editor**.

The purpose of this guide is to provide system administrators with an understanding of the EQUELLA Collection Definition Editor tool to enable successful contribution of items to the repository.

Please note that this guide has been developed to reflect the full capabilities of EQUELLA and as such may differ in appearance from your own installation. The examples in this guide use a LOM compliant schema called the *Generic Schema* and a collection called the *Learning Resources Collection*. Information on institution management is provided in the *EQUELLA Installation and Administration Guide*.

Collection definition editor

Collection definitions wrap important information (metadata) and processes around raw files. Wizards gather this metadata during contribution and associate it with the contributed files to create a repository resource. The metadata can be used to control moderation and user access.

A metadata schema must be defined before a collection definition can be created. Further information on editing and creating metadata schemas is provided in the *EQUELLA Metadata Schema Configuration Guide*.

An instance of the schema metadata is associated with each resource contributed to the collection and controls the resource's lifecycle and search ability. The example in this document uses the *Generic Schema* provided with the *EQUELLA Vanilla Institution*. Schemas are created using the Metadata Schemas tool from the Administration Console. Further information is provided in the *EQUELLA Metadata Schema Configuration Guide*.

Collection definitions are modified or created in the EQUELLA **Administration Console**.

To access EQUELLA and open the Administration Console

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

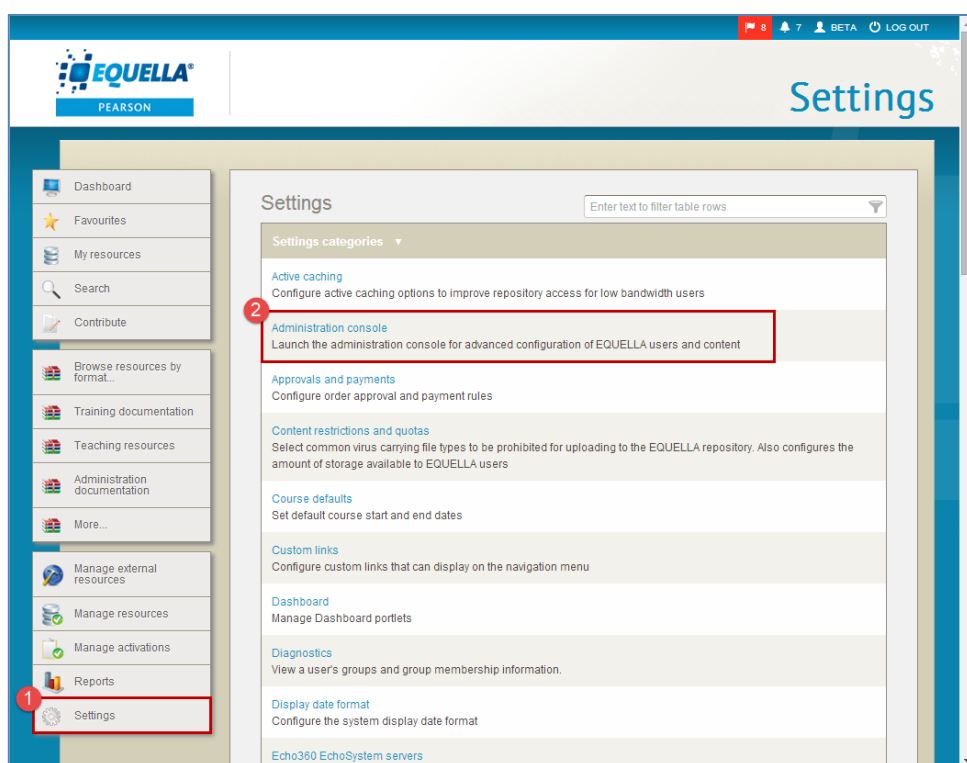


Figure 1 Open Administration console

2. The Administration console displays. Select **Collection Definitions** to display a list of collections, as shown in Figure 2.

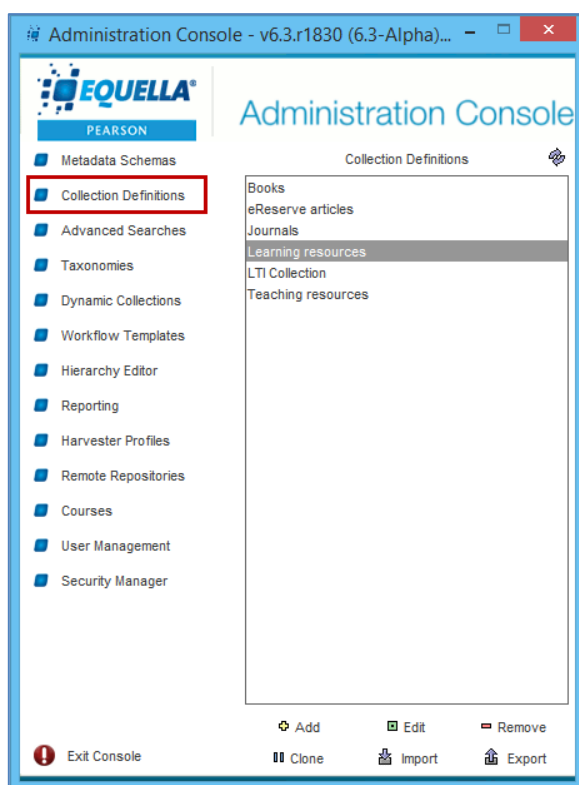


Figure 2 Administration Console—Collection Definitions pane


Administration Console elements

When the **Collection Definitions** tool has been selected the **Add**, **Edit**, **Remove**, **Clone**, **Import** and **Export** buttons are enabled. (Providing the correct privileges have been granted, see the *EQUELLA Security Guide* for more information.)

Add

Click  **Add** to display the Collection Definition Editor and create a new collection.

Edit

Select a collection then click  **Edit** (or double-click on a collection name) to display the Collection Definition Editor and modify the selected collection.

If the selected collection is being edited by another user a **Locked** dialog is displayed; an example is shown in Figure 3.

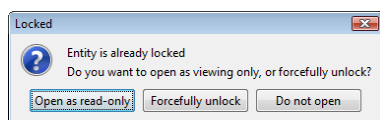



Figure 3 Locked entity dialog



Choose one of the following options:

- **Open as read-only**—disables the  **Save** button so that no changes can be made to the collection.
- **Forcefully unlock**—unlocks the entity from another user. Editing can occur but the other user's changes will be lost.
- **Do not open**—the selected collection's editor is not opened.


Remove

Click  **Remove** to delete the selected collection. You will be asked to confirm this action.

Clone

Click  **Clone** to copy an existing collection. The cloned collection can then be modified by clicking  **Edit**.

Import

Click  **Import** to import a collection that has previously been exported from the Administration Console. A warning dialog displays, 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.)

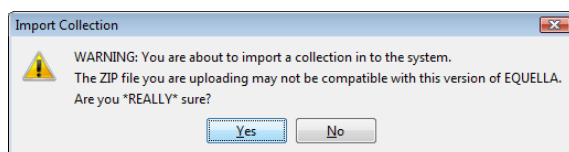



Figure 4 Import Collection warning dialog

Export

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

Configure collection definitions

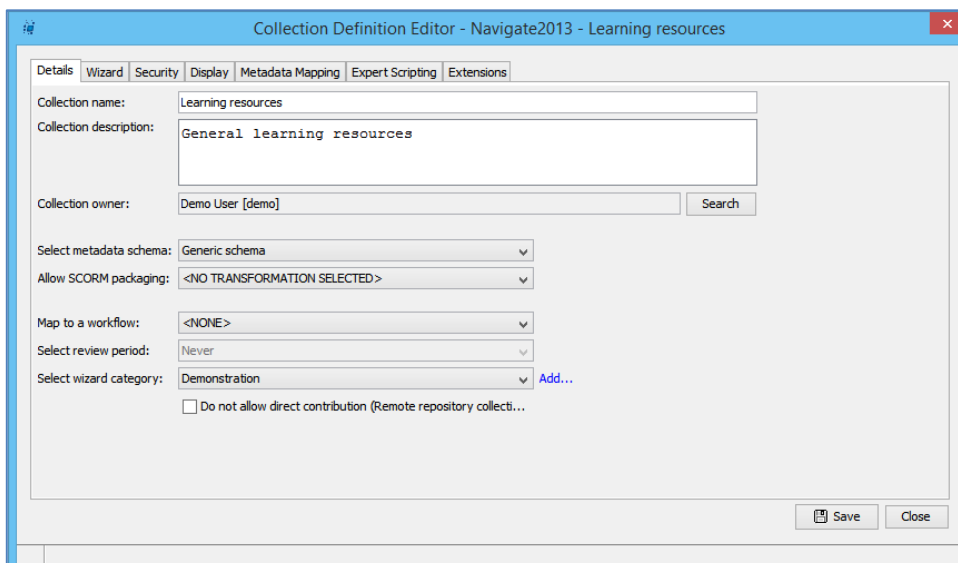
The Collection Definition Editor provides an interface for collection creation with the following tabs:

- **Details**—general information for the collection definition, including name, description and category, associated metadata schema and workflow template.
- **Wizard**—creates the contribution wizard to gather the metadata about the resource.
- **Security**—controls access to a collection and its wizard, resources or metadata.
- **Display**—contains the various templates for displaying a collection resource's metadata.
- **Metadata Mapping**—enables the mapping of metadata from uploaded items to collection definition schema fields.
- **Expert Scripting**—enables the addition of scripts that can be run at particular points in the resource's lifecycle.
- **Extensions**—configures copyright compliance.

Each tab is described in the following sections:

Details tab

The **Details** page is displayed when the Collection Definitions Editor is opened. An example is shown in Figure 5.



The screenshot shows the 'Collection Definition Editor - Navigate2013 - Learning resources' window. The 'Details' tab is selected, showing fields for 'Collection name' (Learning resources), 'Collection description' (General learning resources), 'Collection owner' (Demo User [demo]), 'Select metadata schema' (Generic schema), 'Allow SCORM packaging' (<NO TRANSFORMATION SELECTED>), 'Map to a workflow' (<NONE>), 'Select review period' (Never), and 'Select wizard category' (Demonstration). There is an 'Add...' link next to the wizard category. A checkbox for 'Do not allow direct contribution (Remote repository collecti...)' is also present. At the bottom right are 'Save' and 'Close' buttons.

Figure 5 Details page

The **Details** page allows the entry or editing of general collection information such as the name, description and category. Much of this information is displayed to the user when contributing resources and enables users to select a suitable collection definition for their contribution. The Details page elements include:

Collection name

The unique display name for the collection (e.g. *Learning Resources*). A collection cannot be saved if it is not named.

Collection description

Descriptive information about the collection (e.g. *General learning resources*). This description is displayed to help contributors choose the most relevant collection when they are contributing resources.

Collection owner

By default, the owner of the collection is the creator of the collection. Click the **Search** button to display the **Select Recipients...** dialog where a new owner can be selected.

Select metadata schema

The metadata schema associated with the collection. Click on the arrow to display a drop-down list of available schemas. An example is shown in Figure 6. Select a schema (e.g. *Generic schema*) from the list.

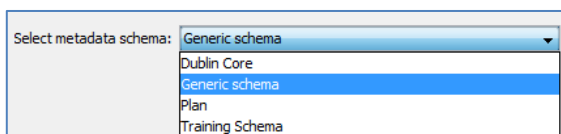


Figure 6 Select metadata schema drop-down list

Allow SCORM packaging

This enables resources belonging to this collection to be downloaded as a SCORM compliant package. Click the arrow to display a drop-down list of available XSLTs. Select an XSLT from the list. Any SCORM XSLT templates uploaded using the metadata schema's **Transformation** tab are associated with the metadata schema. Further information is provided in the *EQUELLA Metadata Schema Configuration Guide*.

Map to a workflow

Associate a workflow with this collection so that contributed resources automatically enter the selected workflow. Workflows are used to moderate resource quality. Click the arrow to display a drop-down list of available workflow templates and select a workflow from the list. Further information is provided in the *EQUELLA Workflow Moderation Configuration Guide*.

Select review period

Set the period between moderation reviews to ensure the resource remains current. Once an item has been *live* for the set period it is automatically sent for re-moderation. Click the arrow to display a list of available review periods and select a time period from the list. (*Note: This field is only enabled if a workflow has been assigned to the collection.*)

Select wizard category

The wizard category provides a means of grouping collections. The collection is displayed in the selected category on the user contribution page. Click the arrow to display a list of available wizard categories and select a category from the list. If there is no suitable category, new ones can be created. Select the **Add** link to display a **New Wizard Category** dialog. An example is shown in Figure 7.

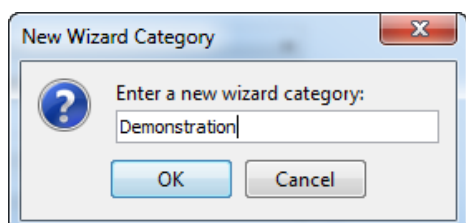



Figure 7 New Wizard Category dialog

Enter a new category name (e.g. *Demonstration*) and click . The new category is added to the drop-down list. An example is shown in Figure 8.

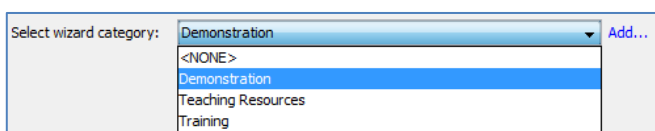


Figure 8 Select wizard category drop-down list

The collection name (e.g. *Learning Resources Collection*), description and wizard category (e.g. *Demonstration*) are displayed to users on the **Contribute** page. An example is shown in Figure 9.

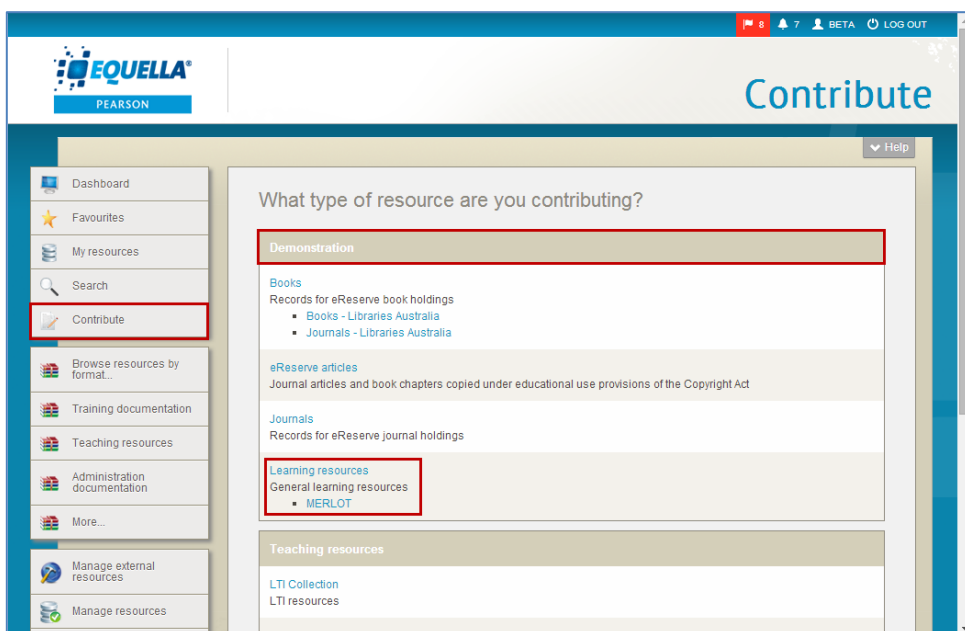




Figure 9 Category and collection displayed on Contribute page

Save and Close buttons

Click  to save the configuration details, and click  to close the Collection Definition Editor.

Wizard tab

The **Wizard** page enables the construction of a contribution wizard. Contribution wizards are used to assist contributors in providing the information (metadata) appropriate for the contributed resources. The wizard is displayed when a collection is selected from the **Contribute** page. An example is shown in Figure 10.

Figure 10 Example user's view of a contribution wizard page

Wizards comprise at least one page and each page can include a variety of wizard controls. Controls are available for prompting users to input text, make selections, upload files and various other actions. Further information on wizard controls is provided in the *EQUELLA Wizard Controls Reference Guide*. Figure 11 shows the Wizard page before any pages or controls have been added.

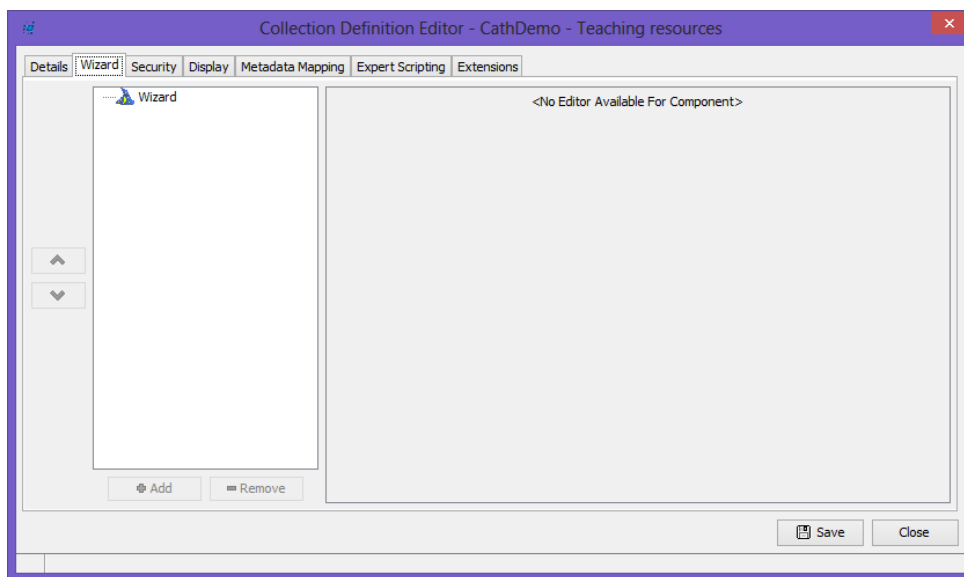



Figure 11 Collection Definition Editor—Wizard page

The Wizard page elements include:

Hierarchy pane

Located on the left-hand side of the page. It displays a  Wizard node and the pages and controls that have been added to the wizard. The hierarchy provides the structure for the pages and controls that make up the wizard. Selecting a page or control will populate the Control Editor pane with its details.

Control Editor pane

Located on the right-hand side of the page. It displays the details of the currently selected control in the Hierarchy pane. The contents of the control editor pane are dependent on the selected control.

Movement arrows



Use the arrow buttons to change the order the controls appear in the hierarchy and hence the wizard.

Use  to move the selected control above its neighbouring sibling.

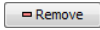
Use  to move the selected control below its neighbouring sibling.

When moving a control any sub-controls it contains are also moved. There is the exception of the static metadata control that cannot be moved.


Add button

Click  to display the **Select a control...** dialog. The available controls depend on the type of the currently selected control. For example, if the wizard control is selected, *DRM*, *Navigation Builder*, *Page* and *Static Metadata* are the available controls. **Select** a control then click  to add the control to the Hierarchy pane.

Remove button

Click  to delete the currently selected control.

Wizard layout

The wizard layout must be configured for all contribution wizards. Select the  Wizard node from the Hierarchy pane to display the page details in the Control Editor pane. An example is shown in Figure 12.

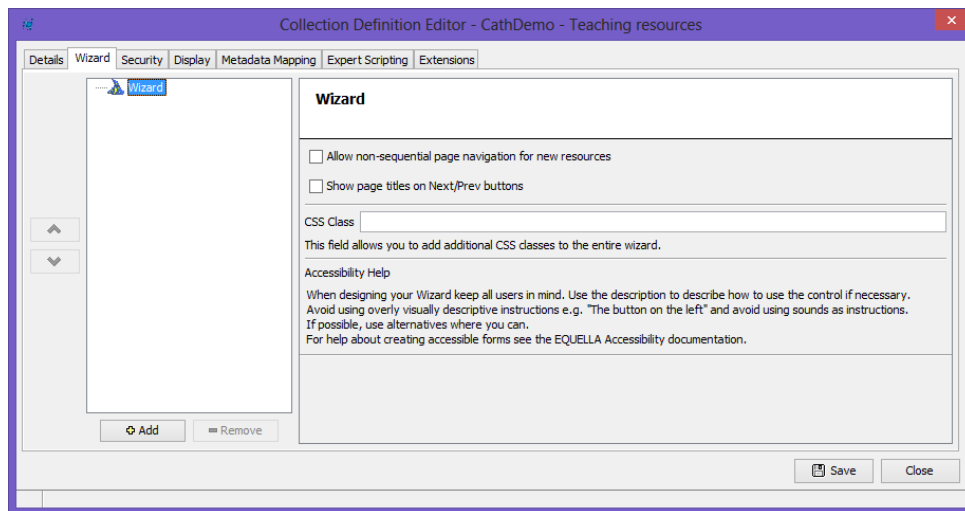


Figure 12 Wizard control page

The Wizard page elements include:

- **Allow non-sequential page navigation for new resources**—Check this box to allow random order stepping through wizard pages during contribution. This option also allows users to submit a resource without having to go to every page in the contribution wizard.
- **Show page titles on Next/Prev buttons**—check this box to allow the page navigation links to display the wizard page name instead of Next and Prev. An example of a contribution wizard where this option has been checked is shown in Figure 13.

Figure 13 Page titles on contribution wizard navigation buttons

- **CSS Class** – enter the name of a pre-defined CSS Class to be applied to the contribution wizard. This CSS Class is defined in the *customer.css* file imported when a theme is applied. For further information, see the *EQUELLA Theming Guide*.

Pages and controls

Select the Wizard node and click to display a **Select a control...** dialog. An example is shown in Figure 14.

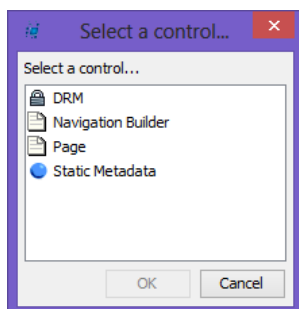


Figure 14 Select a control dialog


Only controls that can be added as root elements in the hierarchy are displayed at this point. All other controls are added as children of the **Page** node.


Available controls are as follows:

DRM (Digital Rights Management)—collects information on the digital rights associated with contributed resources.

Navigation Builder—allows users to create a navigation tree from uploaded items. It also enables the configuration of options such as available image viewers and split view.

 **Page**—used to provide logical steps in the wizard.

 **Static Metadata**—used to store metadata that is fixed for all resources of a collection.

Once a **Page** control has been added to the Hierarchy pane, child elements can be added. Select the **Page** node and click  to display the **Select a control...** dialog. All available controls are displayed. An example is shown in Figure 15.

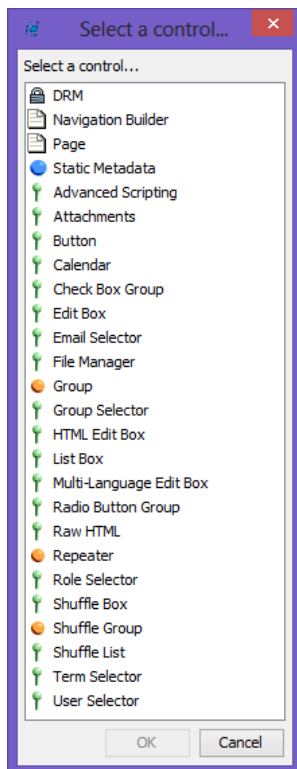




Figure 15 Select a control... dialog

The two new control type icons displayed in this dialog are as follows:

 **Control**—represents all individual wizard controls.

 **Group/Repeater/Shuffle Group**—these controls are designed to collect multiple sets of information. These controls cannot be used in isolation but require one or more single controls to be added as children.

Common control elements

An example of a typical control page is shown in Figure 16.

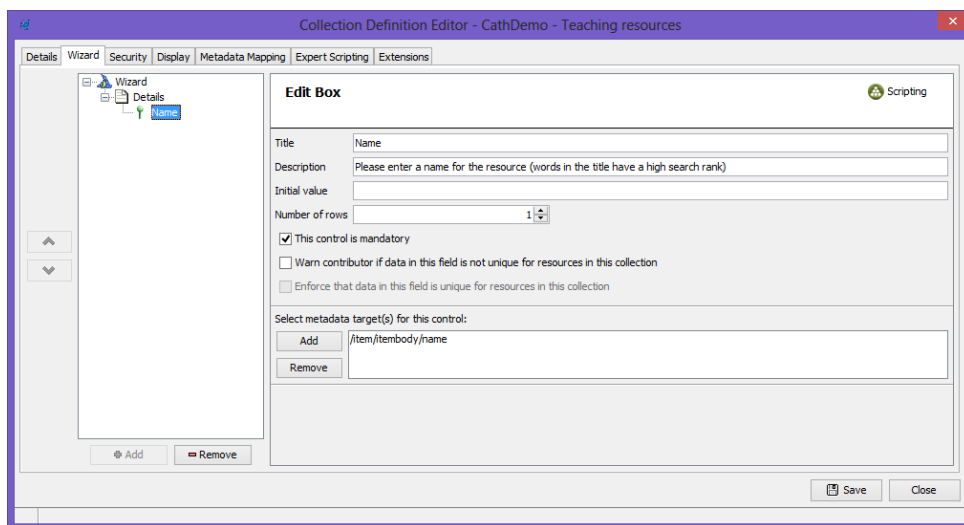


Figure 16 Control page

Every control will differ according to its purpose, but there are some elements that are common to most controls. These common elements are briefly described below:

Title

Data entered in the **Title** field is displayed to the user as the name of the control (e.g. *Name*).

Description

This field can describe the control or how to use it (e.g. *Please enter a name for this resource (words in the title have a high search rank)*).

An example of the user's view of a control Title and Description in the contribution wizard is shown in Figure 17.

Figure 17 User's view of Edit Box control

Scripting

Click the  Scripting button to display the **Script Editor**. An example is shown in Figure 18.

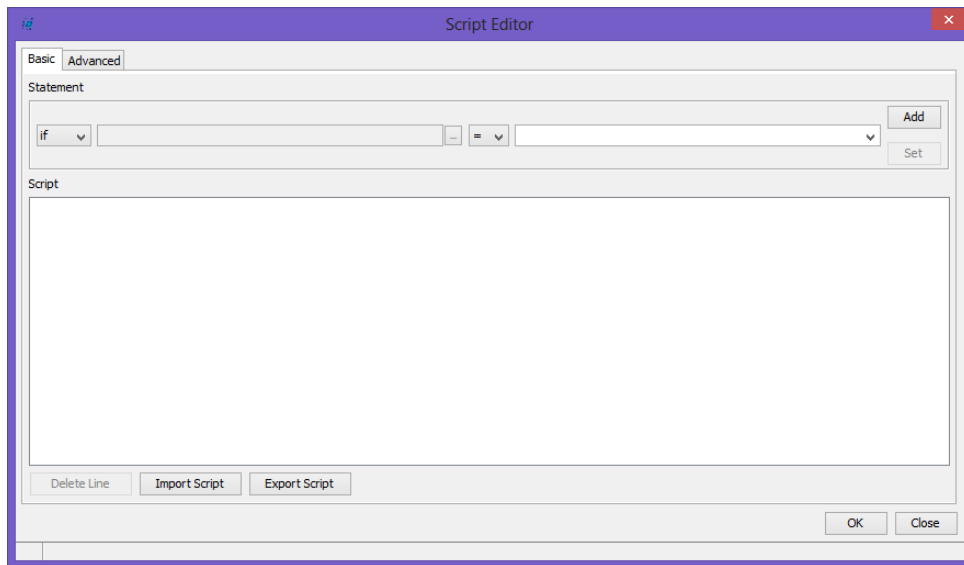



Figure 18 Script Editor

Scripting can be used to evaluate schema items, user roles or resource status and to modify controls based on the result. Further information is provided in the *EQUELLA Scripting Guide (Basic)*. Controls that have an associated script are displayed in the Hierarchy pane with a small red square beside them: .

This control is mandatory

Select this check box to ensure that the control must be completed before the resource can be submitted to the repository. A red asterisk is displayed with mandatory controls during the contribution process. If a mandatory field has not been completed on a page, the page links display an asterisk beside the relevant page. An example is shown in Figure 19.

Contribute > Learning resources

Classification

Keywords
Enter additional keywords for free text searching separated by spaces

Learning Resource Type *
No terms selected
[Select terms](#)

Format of files stored in this item

Audio
Video
Image
Document
Other

Aggregation level *
At what level is the most complex resource in this item
Please select one

[About *](#)

[Save](#) [Preview](#) [Cancel](#)

Figure 19 Page links with asterisks

If the user saves the resource without completing all the mandatory fields, a warning dialog displays, as shown in Figure 20.

Save

This item has fields that need to be completed before it can be submitted (marked with red asterisks). You can complete these fields now, or save the item as a draft and complete them later.

[Complete wizard](#) [Save draft](#) [Cancel](#)

Figure 20 Complete Wizard message

The user has the option to return to the wizard and complete any mandatory fields, or the resource can be saved as a draft and completed later.

Select metadata target(s) for this control

Most controls require a schema node to be designated as the storage area for entered data. These schema nodes are called **metadata targets**. Typically one target is selected although multiple metadata targets can be selected for any control. Click [Add](#) to display a **Choose a schema element?** dialog. An example is shown in Figure 21.

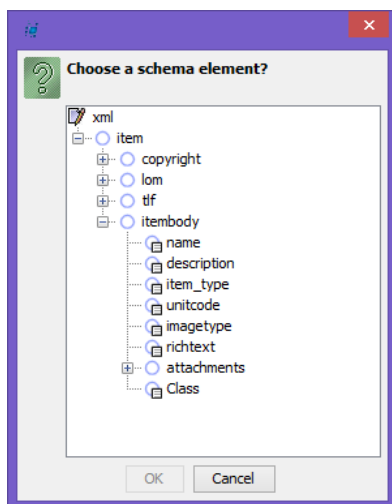


Figure 21 Choose a schema element? Dialog

The schema displayed corresponds to the one previously selected on the **Details** page. Refer to the [Select metadata schema](#) section on page 8 for more information. Select a schema element (e.g. *item/itembody/name*) and click to display the selected element in the **Select metadata target(s) for this control** field. An example is shown in Figure 22.

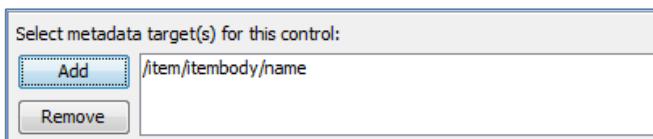


Figure 22 Metadata target selected

Create a Contribution Wizard

The example *Learning Resources Collection* wizard shown in Figure 10 is a multi-purpose wizard with a variety of controls with associated scripts. The hierarchy of these controls in the Collection Definition Editor is shown in Figure 23.

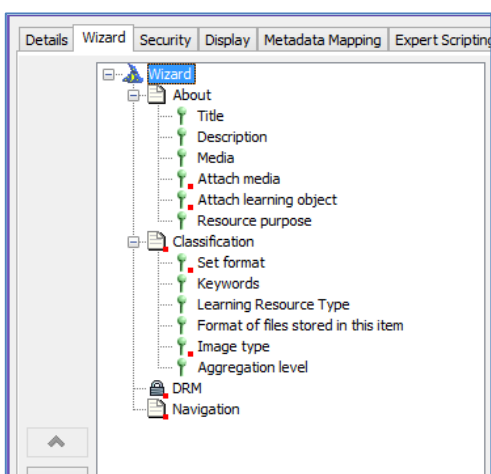




Figure 23 Wizard page Hierarchy pane

To add pages and controls

1. Select the *Wizard* node in the Hierarchy pane and choose a layout style as outlined in the [Wizard layout](#) section on page 12.
2. Click  to display the **Select a control...** dialog. An example is shown in Figure 14.
3. Select an element (e.g. *Page*) from the list.
4. Click  to close the dialog. The *Page* node is added as a child of the *Wizard* node and the **Page** control page is displayed in the Control Editor pane. An example is shown in Figure 24.

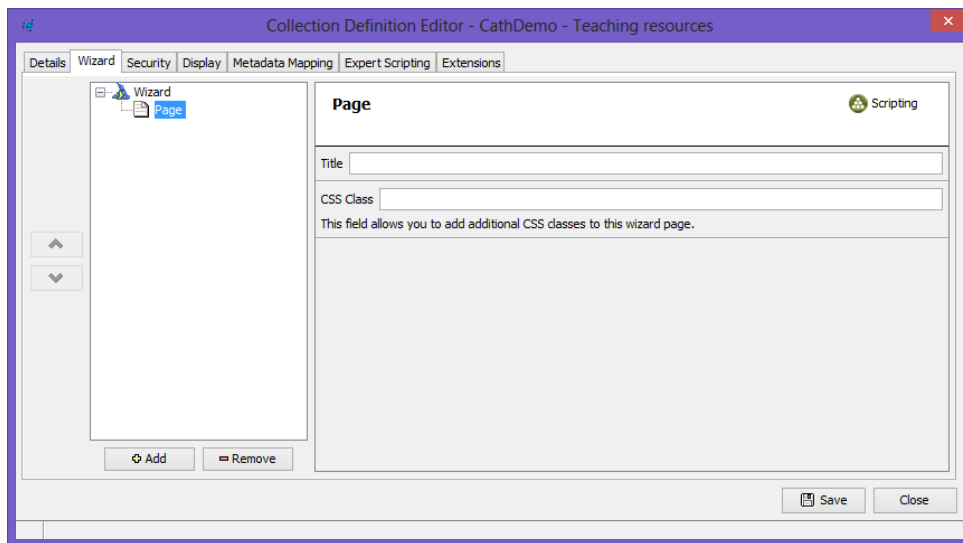






Figure 24 Page control page

5. Enter a name in the **Title** field (e.g. *About*). This is the name displayed to users on the corresponding wizard tab or sidebar list.
6. Click  to display the **Select a control...** dialog with the full list of available controls. An example is shown in Figure 15.
7. Select an appropriate control.
8. Click  to close the dialog. The selected control is added as a child of the *Page* node and its control page is displayed in the Control Editor pane.
9. Configure the control page as necessary.

Multiple pages and controls can be added to the wizard as required.

To save the Wizard page settings

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

Security tab

User access to a collection is configured on the Collection Definition Editor **Security** page. Various privileges can be assigned to different users, groups or institutional roles, for example:

- *Create, Delete and Edit this collection* privileges are typically restricted to the *System Administrator* role. An administrator is typically granted permission to perform all actions on a collection and resources belonging to that collection.
- *Contribute, Comment and Clone* privileges are typically granted to the *Contributor* role.
- *Search, View and Share* privileges are typically granted to the *Viewer* role.

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

The Security page features three tabs: **Access Control**, **Resource Status ACLs** and **Item Metadata ACLs** that are described in the following sections:

Access Control tab

The **Access Control** page comprises a **Who can...?** drop-down list of applicable privileges for the collection and a choice of interfaces for configuring user access to these privileges.

Who can...?

Privileges can be granted to users enabling them to perform a variety of actions on a collection or resources within a collection. The privileges associated with collections and found in the drop-down list are:

- **add a course at time of activation from a LMS in any state** – when users are granted this privilege the courses are automatically created in EQUELLA if there is no match found when activating courses from the integration screen.
- **add comments to resources in this collection in any state**—allows users granted this privilege access to the comments area of a resource belonging to the collection.
- **allow search filtering by this collection**—allows users granted this privilege to use an advanced search to find resources belonging to this collection.
- **allow user to override at time of activation in this collection in any state** – allows users granted this privilege the ability to override the copyright warning during activation of copyright content.
- **archive resources in this collection in any state**—allows users granted this privilege to archive resources belonging to this collection regardless of current status.
- **change the collection type of resources in this collection in any state**—allows users granted this privilege to move resources belonging to this collection to another collection.
- **clone resources in this collection in any state**—allows users granted this privilege to clone resources of any status belonging to this collection.

- **contribute resources with this collection**—allows users granted this privilege to contribute new resources to the selected collection.
- **create new versions of resources in this collection in any state**—allows users granted this privilege to create new versions of existing resources of any status in this collection.
- **deactivate activation requests on resources in this collection in any state**—allows users granted this privilege to deactivate activation requests for resources of any status belonging to this collection.
- **delete activation requests on resources in this collection in any state**—allows users granted this privilege to delete activation requests for resources of any status belonging to this collection.
- **delete comments on resources in this collection in any state**—allows users granted this privilege to delete comments from resources of any status belonging to this collection.
- **delete resources in this collection in any state**—allows users granted this privilege to delete resources of any status from the collection.
- **delete this collection**—allows users granted this privilege to delete the collection definition itself.
- **discover resources in this collection in any state**—allows users granted this privilege to discover (or find) all resources with any status that belong to this collection. This is different to **view resources in this collection in any state** in that discover will show the resource names in a results list, but without the view option, the resource can't be selected and viewed on the Resource summary page.
- **download resources in this collection in any state**—allows users granted this privilege to download resources of any status from this collection.
- **edit activation requests on resources in this collection in any state** – allows users granted this privilege to edit activation details.
- **edit copyright on resources in this collection in any state**—allows users granted this privilege the ability to edit copyright details for resources of any status belonging to this collection.
- **edit resources in this collection in any state**—allows users granted this privilege the ability to make changes to resources of any status belonging to this collection.
- **edit this collection**—allows users granted this privilege access to the Collection Definition Editor to make changes to this collection.
- **export resources from this collection in any state**—allows users granted this privilege to export resources of any status belonging to this collection.
- **find uses for resources in this collection in any state** – allows users granted this privilege to view information regarding where the resources are used in an integrated LMS.
- **purge deleted items from this collection** – allows users granted this privilege to purge items from the collection, once the items have been marked as deleted.

- **reassign ownership of resources in this collection in any state**—allows users granted this privilege to reassign the ownership of resources of any status belonging to this collection.
- **redraft resources in this collection in any state**—allows users granted this privilege to redraft resources of any status belonging to this collection.
- **set pricing information for resources in this collection in any state** – allows users granted this privilege to set the pricing details for resources belonging in this collection, when the EQUELLA Content Exchange has been enabled.
- **set resources in this collection in any state for review** – allows users granted this privilege to set resources belonging in this collection for review (sends them back into workflow).
- **share resources in this collection in any state**—allows users granted this privilege to share resources of any status belonging to this collection.
- **suspend resources in this collection in any state**—allows users granted this privilege to suspend resources of any status belonging to this collection. Suspending a resource prevents it from showing in results lists.
- **view activation requests on resources in this collection in any state**—allows users granted this privilege to view activation requests on resources of any status belonging to this collection.
- **view attachments for inactive portions in this collection in any state** – allows users granted this privilege to open and view attachment content for inactive copyright items.
- **view attachments marked as restricted in this collection in any state** – allows users granted this privilege the ability to view attachments that have been marked as restricted.
- **view comments on resources in this collection in any state**—allows users granted this privilege to view comments that have been added to resources of any status belonging to this collection.
- **view digital rights on resources in this collection in any state**—allows users granted this privilege to view digital right details that have been configured for resources of any status belonging to this collection.
- **view linked portions for resources in this collection in any state** – allows users granted this privilege to see the *Links to other portions* section on copyright portion record's summary page.
- **view pricing information for resources in this collection in any state** – allows users granted this privilege to view the pricing details for resources in this collection when the EQUELLA Content Exchange is being used.
- **view purchase details for resources in this collection in any state** – allows users granted this privilege to view the purchase details on the Resource summary page for resources in this collection that have been purchased when the EQUELLA Content Exchange is being used.

- **view resources in this collection in any state**—allows users granted this privilege to view all resources belonging to this collection. This means the ability to click on a resource from a results list to open the resource summary page.
- **view sales history for resources in this collection in any state** – allows users granted this privilege to view the purchase history for resources in this collection when the EQUELLA Content Exchange is being used.
- **view the history of resources in this collection in any state**—allows users granted this privilege to view the moderation history of resources of any status belonging to this collection.
- **view the xml and directory of resources in this collection in any state**—allows users granted this privilege to add a tilde ('~') to the end of a resource summary URL belonging to this collection to view the xml and directory details of the resource.

Configure user access

The interfaces available for configuring access to a collection are:

- **Basic**—allows the simple selection of users, groups or roles to be assigned to the current privilege. An example is shown in Figure 25.

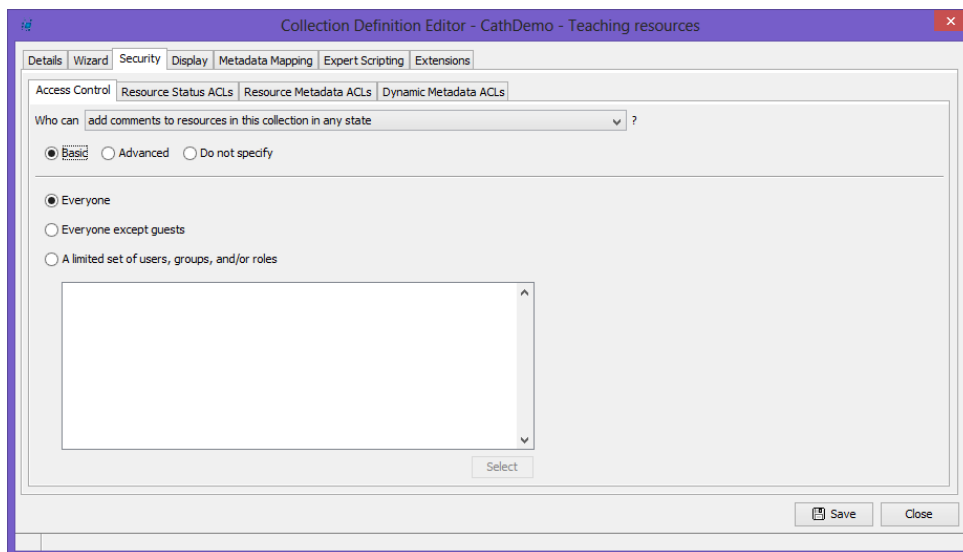


Figure 25 Access Control page—Basic interface

- **Advanced**—provides more comprehensive access control, enabling the granting or revoking of privileges for specific user entities. An example is shown in Figure 26.

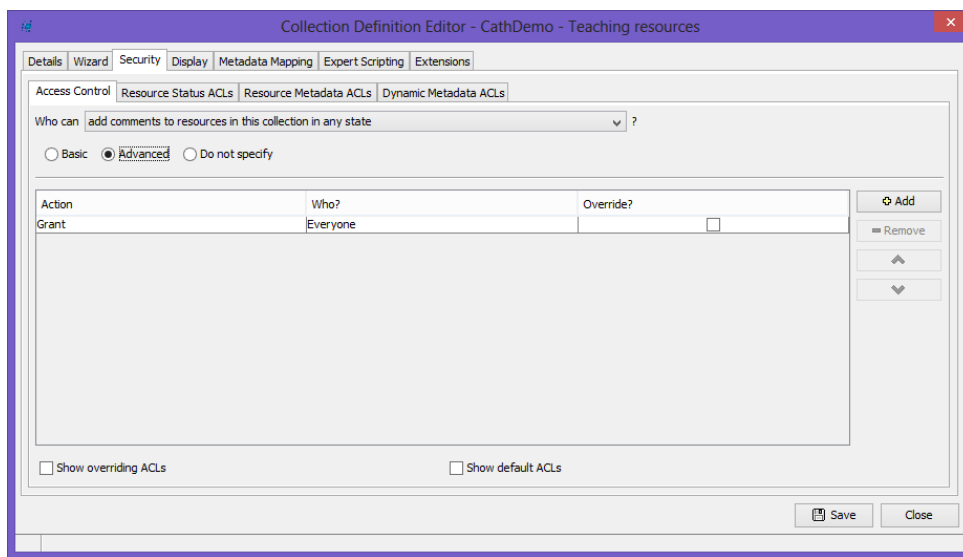


Figure 26 Access Control page—Advanced interface

- **Do not specify**—this interface is not configurable. User access remains as the default set in the Administration Console **Security Manager**. Click the **Show inherited privileges that will apply** to display an action list showing users, groups or roles associated with the selected privilege. An example is shown in Figure 27.

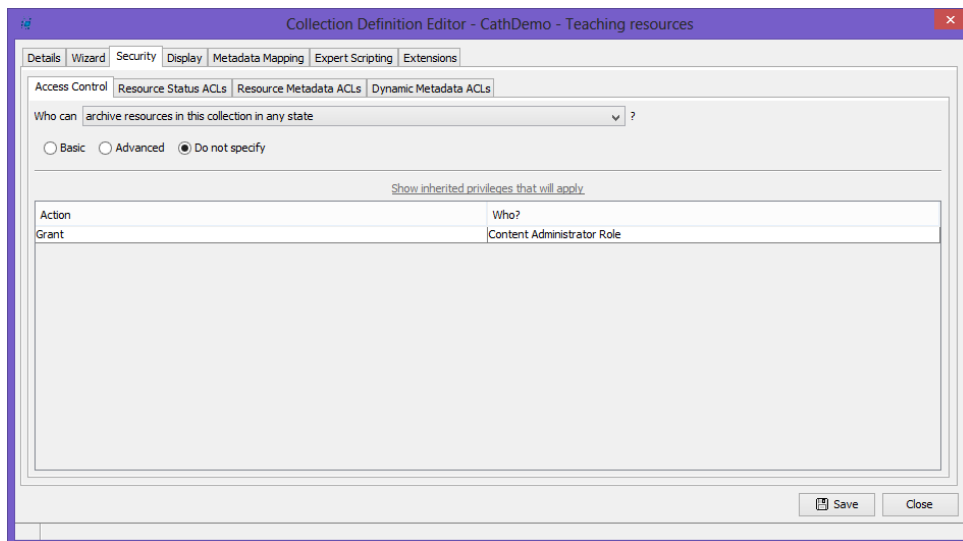


Figure 27 Access Control page—Do not specify interface

Resource Status ACLs tab

The **Resource Status ACLs** page is used to configure access privileges that depend on the state of resources within the collection. It provides the same privilege list as the Access Control page with an additional control for selecting the resource status (e.g. *draft*, *live*, *archived*, *moderating*) associated with the privilege. An example is shown in Figure 28.

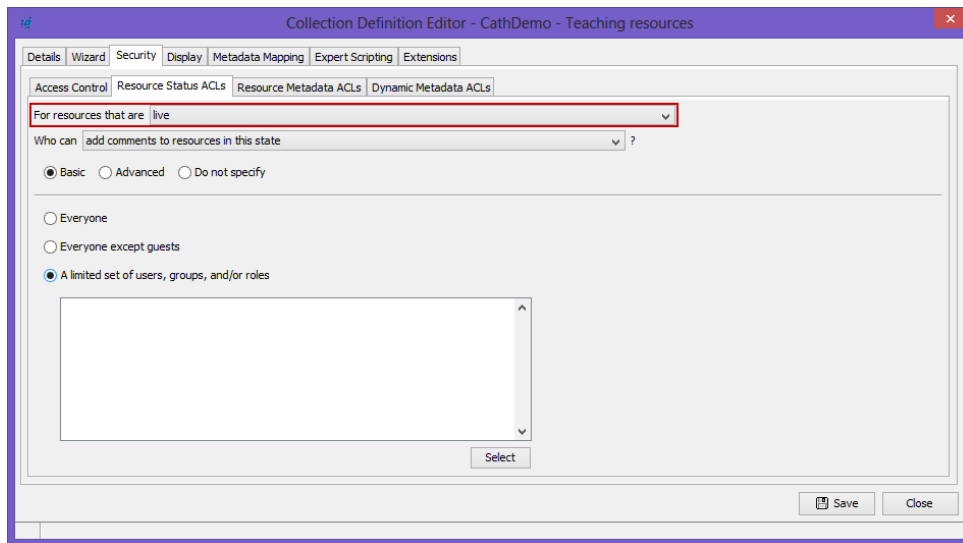


Figure 28 Resource Status ACLs page

Resource Metadata ACLs tab

The **Resource Metadata ACLs** page is used to control access based on resource metadata. It enables the creation of scripts that are evaluated to determine user access to a collection. An example is shown in Figure 29.

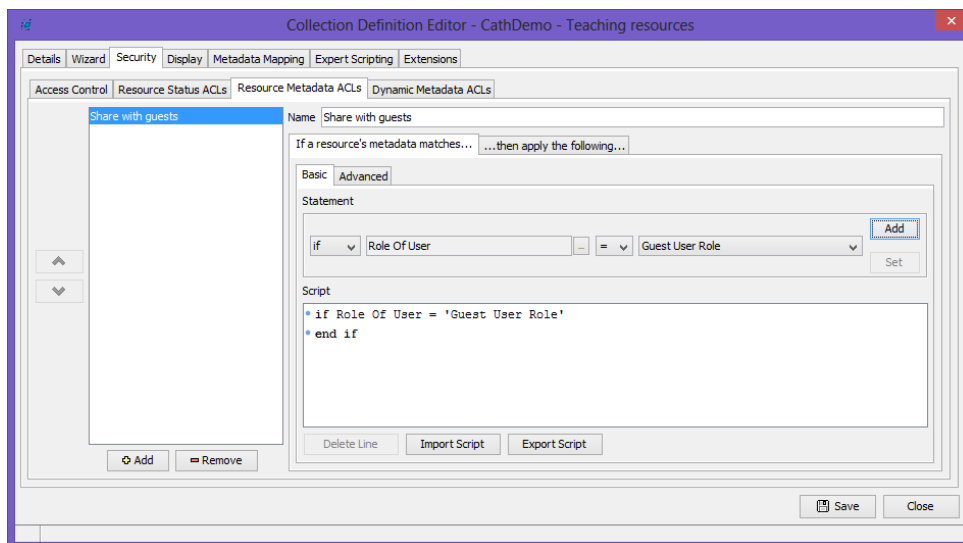


Figure 29 Resource Metadata ACLs page

Further information on collection security and access control is provided in the *EQUELLA Security Guide*.

Dynamic Metadata ACLs

The **Dynamic Metadata ACLs** page is used to create permission rules based on User, Group or Role Ids that are applied dynamically during contribution.

A dynamic metadata rule is created which sets the path, ID type (user, group or role) and the ACLs (privileges) that will be applied when a match is found during contribution. When the values of the metadata nodes for the user, group or role selectors used during contribution match the User, Group or Role IDs, the ACLs are automatically created.

In the example shown in Figure 30 a rule has been set up so that when a Class is selected from a group selector during contribution and the UUID matches a Group ID, the view and discover privileges are dynamically applied to the users contained within that group for that resource.

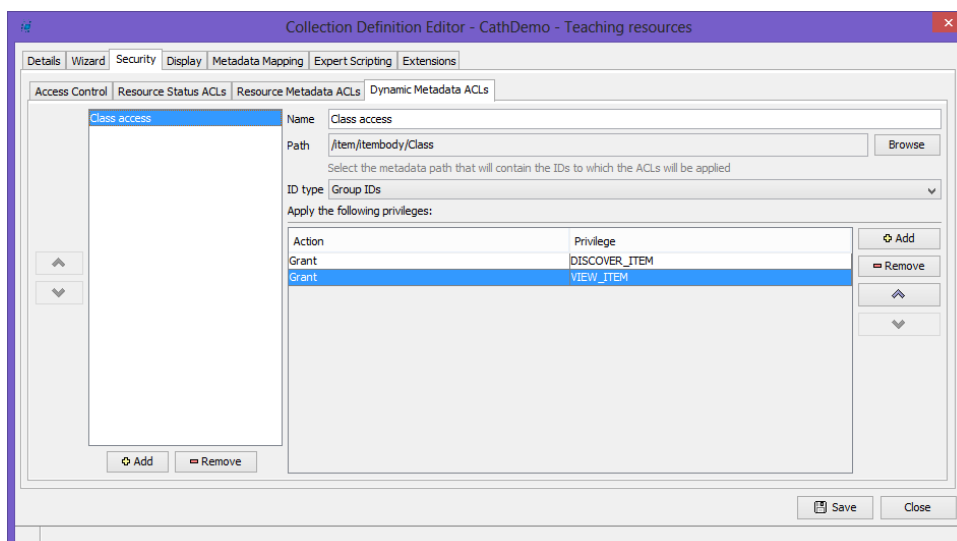


Figure 30 Dynamic Metadata ACL page

Further information on Dynamic metadata ACLs is provided in the *EQUELLA Security Guide*.

Display tab

The **Display** page contains templates for displaying a collection resource's metadata. Standard system default templates are provided, otherwise templates can be customised to suit the requirements of the collection. The Display page features the **Resource Summary Display Template** and **Search Results Template** described in the following sections:

Resource Summary Display Template tab

The **Resource Summary Display Template** page controls how data is displayed on the **Summary** page for a resource belonging to the specified collection. An example is shown in Figure 31.

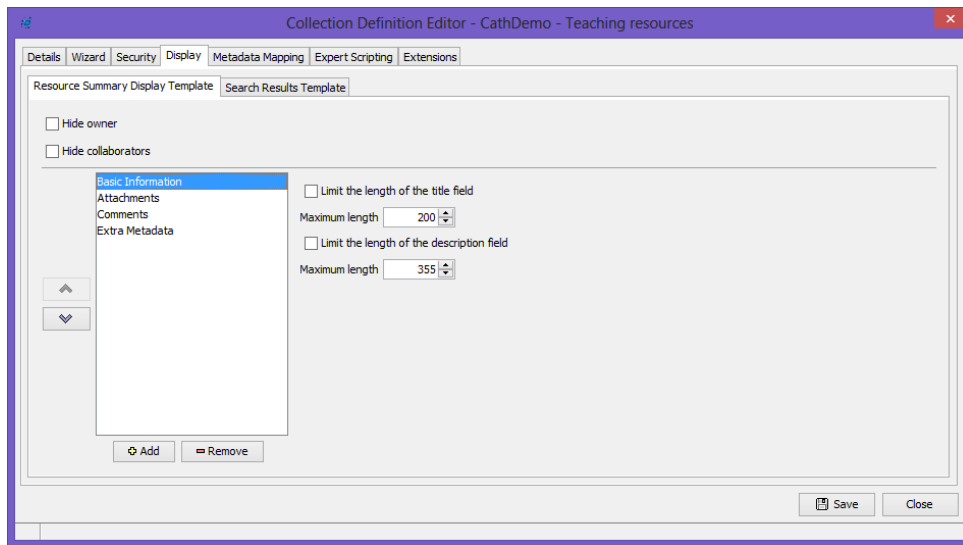


Figure 31 Resource Summary Display Template page

Select the **Hide Owner** and/or **Hide collaborator** check-boxes to prevent the owner and collaborator names from displaying on the resource summary page.

Click  **Add** to display the **Add A New Resource Summary Section** dialog, as shown in Figure 32.

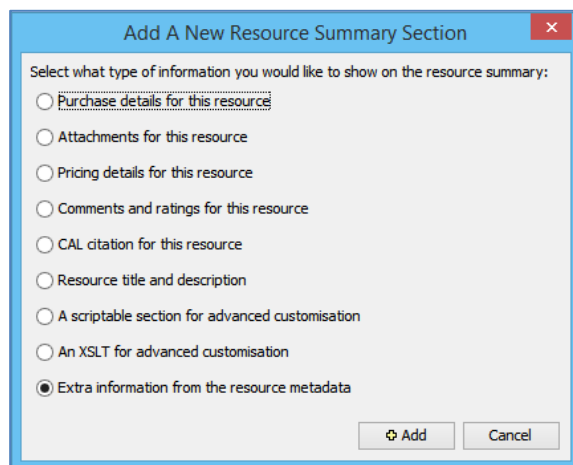


Figure 32 Add a New Resource Summary Section dialog

The following options display:

Purchase details for this resource

Shows details of any resource purchases (EQUELLA Content Exchange).

Attachments for this resource

Shows resource attachment details on the resource summary page, with display mode options. An example is shown in Figure 33.

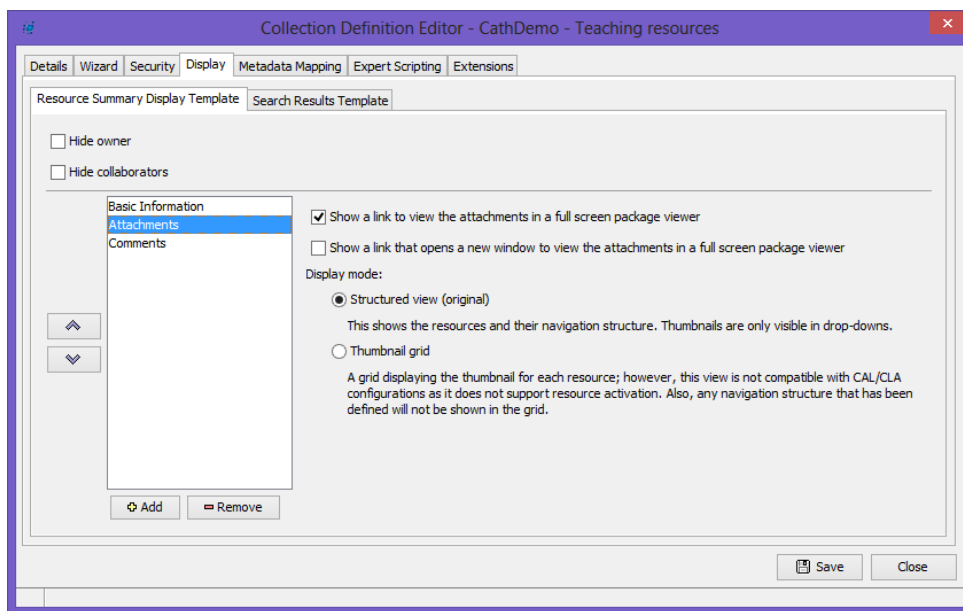




Figure 33 Attachment options

The following options display:

- **Show a link to view the attachments in a full screen package viewer** – select to display the  [Full screen](#) link for attachments.
- **Show a link that opens a new window to view the attachments in a full screen package viewer** – select to display the  [Full screen \(new window\)](#) link for attachments.
- **Display mode:**
 - **Structured view (original)** – select to show the attachments displayed in a list view, or their navigational structure, if used. Thumbnails can be viewed by clicking the drop-down arrow on each attachment. An example is shown in Figure 34.

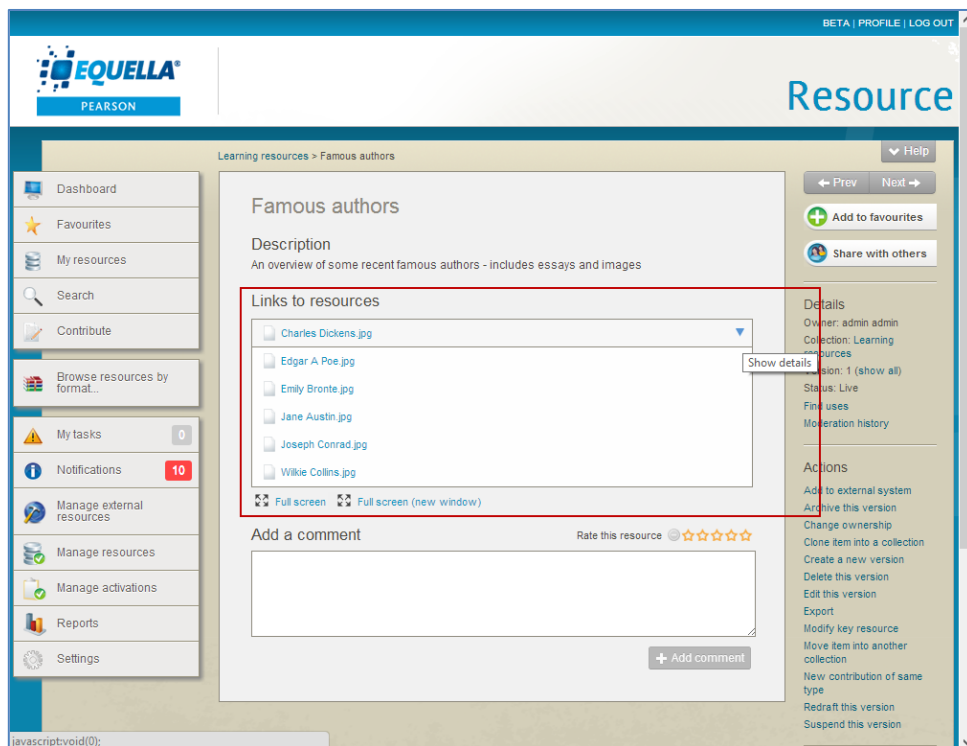


Figure 34 Resource summary with Structured view enabled

- **Thumbnail grid** – select to show each attachment as a thumbnail with the file name beneath. This view should not be used for collections where navigational structure has been defined, nor with CAL/CLA configurations as it doesn't support resource activation. An example is shown in Figure 35.



Figure 35 Resource summary with Thumbnail grid enabled

Pricing details for this resource

Displays the pricing details for resources that are available for purchase (EQUELLA Content Exchange).

Comments and ratings for this resource

Displays comments and ratings that have been recorded for the resource on the resource summary page, with identity options. An example is shown in Figure 36.

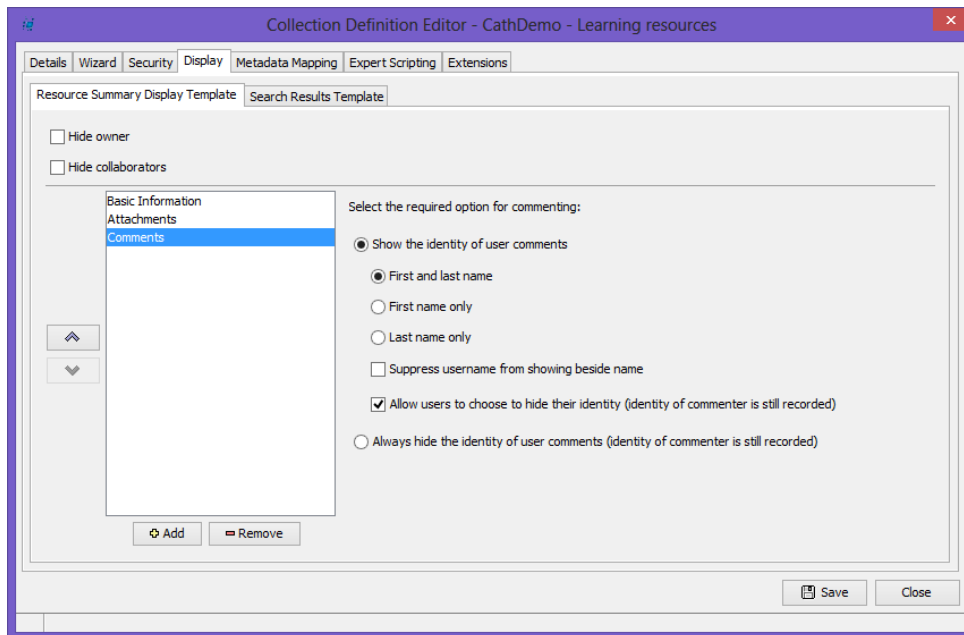


Figure 36 Comments options

The following options display:

- **Show the identity of user comments** – select to display the identity of the user adding a comment to a resource. Once of the following options must then be selected:
 - **First and last name**
 - **First name only**
 - **Last name only**

Additionally, the following options are available for selection if an identity is to be displayed:

- **Suppress username from showing beside name** – select this option to prevent the username from displaying beside the name format selected above.
- **Allow users to choose to hide their identity (identity of commenter is still recorded)** – select this option to display the *Add comment anonymously* checkbox beneath the comment box. Users can select the checkbox to leave an anonymous comment. The username is stored in the database for reference if required.
- **Always hide the identity of user comments (identity of commenter is still recorded)** – select to make all comments added to the collection anonymous. The usernames are stored in the database for reference if required.

The settings shown in Figure 36 are demonstrated in the example shown in Figure 37, where the *First and last names* are displayed, the *username is not suppressed* and the user can choose to *Add comment anonymously* if desired.

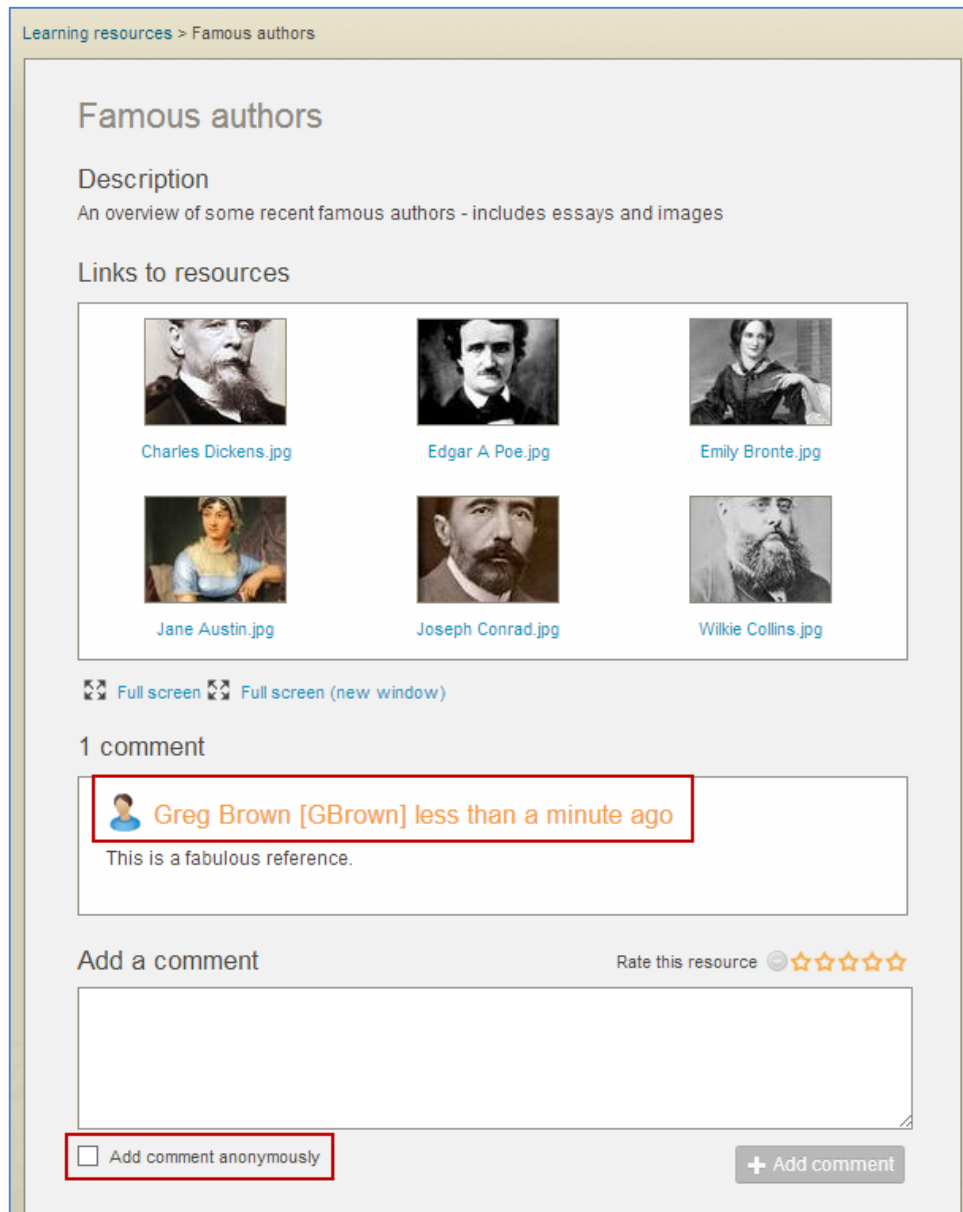


Figure 37 Example of comment identity options

CAL citation for this resource

Displays the CAL citation on the Resource summary page. See the EQUELLA Copyright (CAL) Configuration Guide for further details.

Resource title and description

Displays the name of the resource and any description that has been added on the resource summary page. The title and description field maximum lengths can be set. An example is shown in Figure 38.

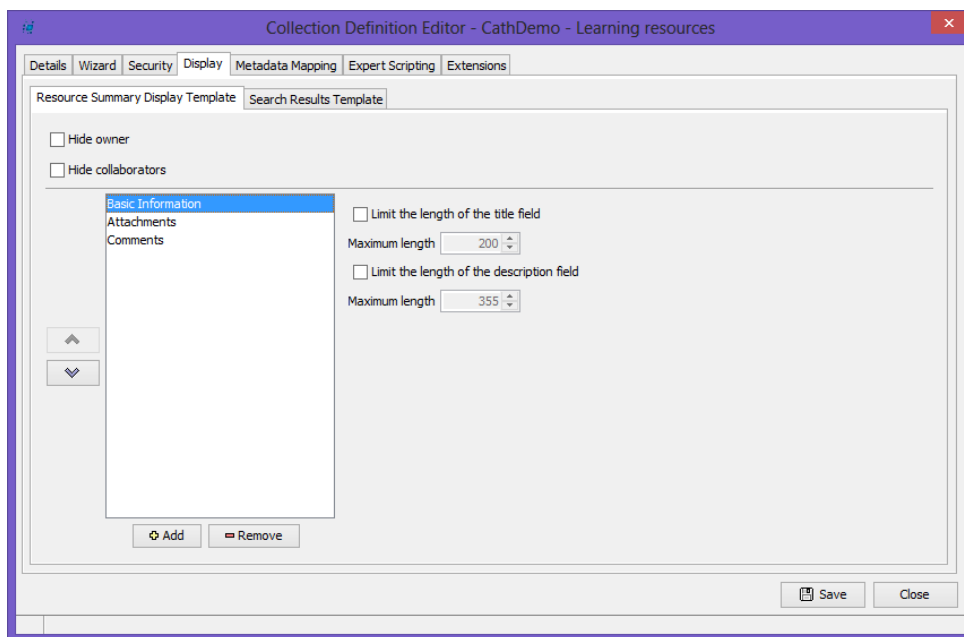


Figure 38 Resource title and description options

A scriptable section for advanced customisation

Provides a page where scripts can be added to customise the resource summary template. An example of the Scripted section page is shown in Figure 39.

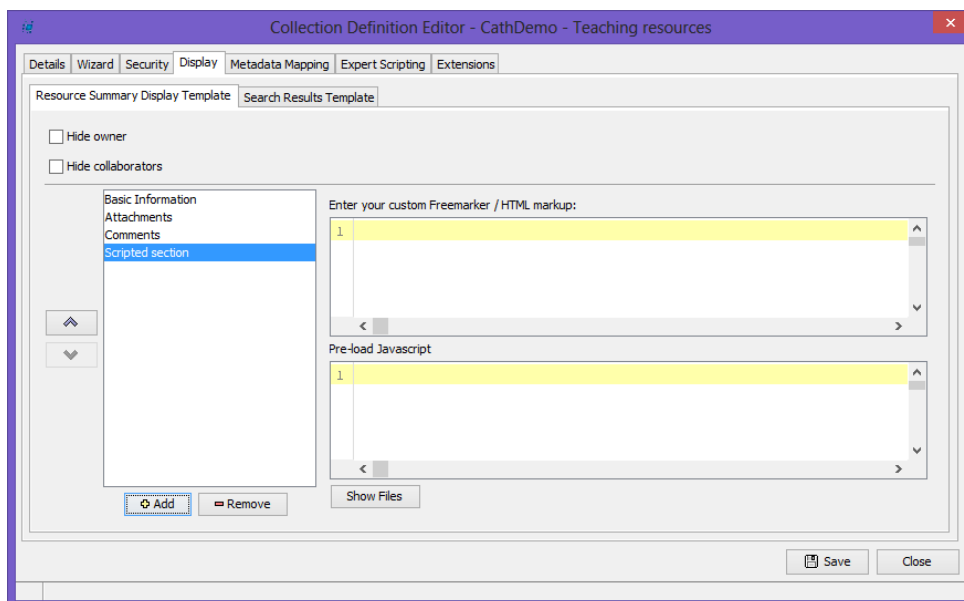


Figure 39 Scripted section page

An XSLT for advanced customization

Provides the ability to upload a custom display template. An example of the XSLT page is shown in Figure 40.

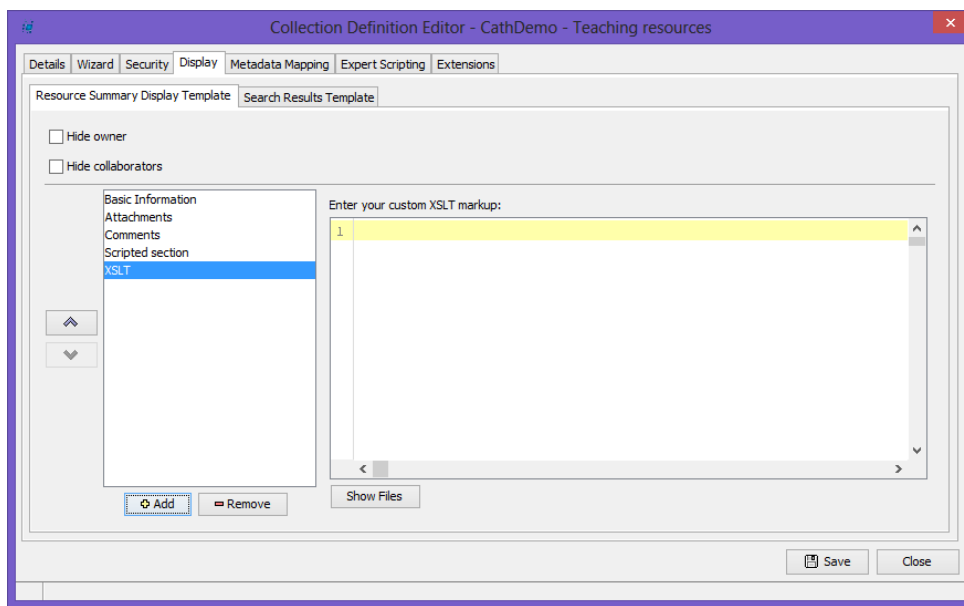


Figure 40 XSLT page

Extra information from the resource metadata

Select additional resource details linked to specific metadata schema nodes to be shown on the resource summary page. An example to display the 'resource type' on the resource summary page is shown in Figure 41.

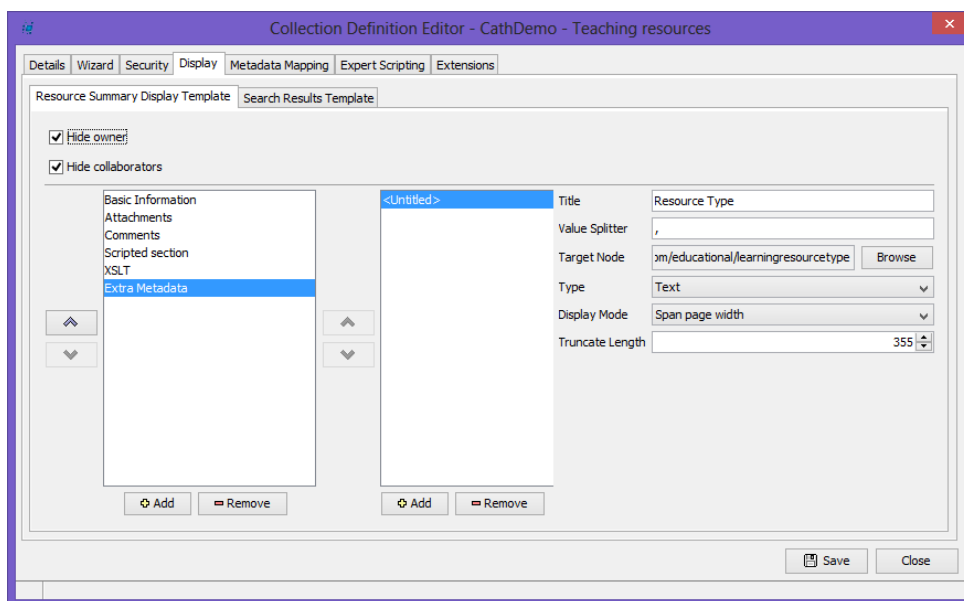


Figure 41 Item metadata on summary page example

The Extra Metadata elements include:

- **Title**—the display name of the field (*e.g. Resource Type*).
- **Value Splitter**—the value used to separate multiple results, such as a comma.
- **Target Node**—click to navigate to the required metadata node in the metadata schema then click .

- **Type**—select the type of result from the drop-down list. Available values are **Text**, **Date**, **HTML** or **URL**.
- **Display Mode**—select from Span page width or half width.
- **Truncate Length**—select the maximum number of characters to display. The default is 355.

(Note: The information on the resource summary page displays in the order it is listed on the Resource Summary Display Template.)

Use  to move the selected component above its neighbouring sibling.

Use  to move the selected component below its neighbouring sibling.

An example of a resource summary page for a resource added to a collection using the Resource Summary Display Template shown in Figure 41 is shown in Figure 42.

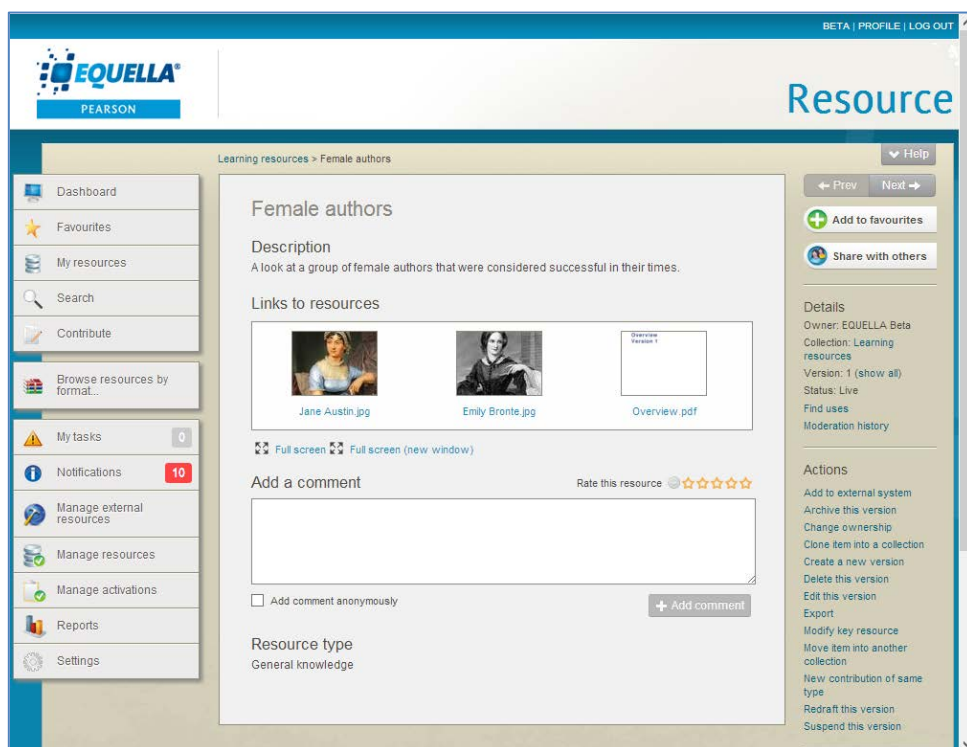


Figure 42 Resource summary page using the Resource Summary Display Template

Search Results Template

The **Search Results Template** page allows specific metadata to be displayed on all results pages for resources belonging to the selected collection, as well as attachment display options. The results template itself can't be edited, but additional information can be added to it. An example is shown in Figure 43.

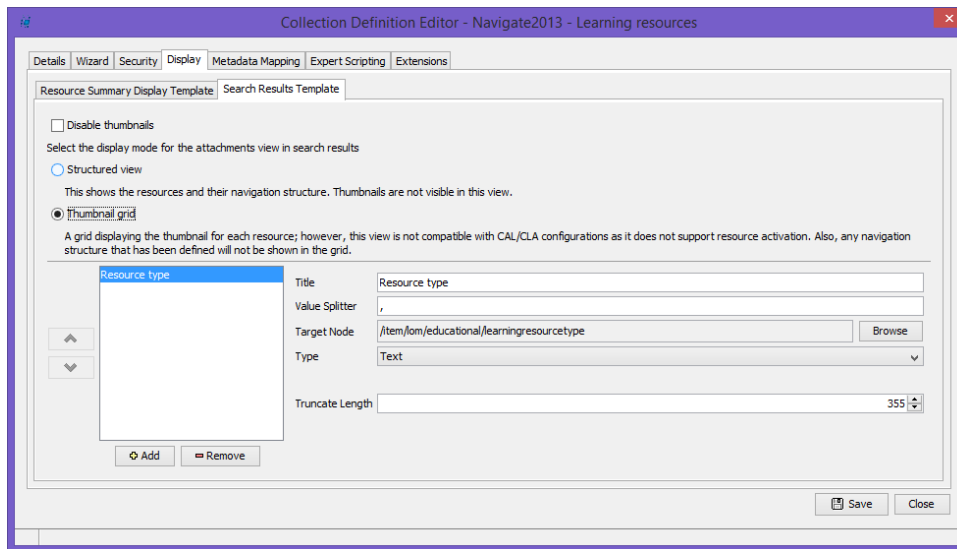


Figure 43 Search Results Template page

Thumbnail options

There are a number of thumbnail display options for results pages. An example is shown in Figure 44.

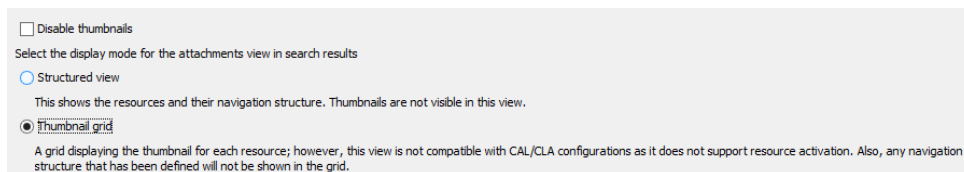


Figure 44 Thumbnail display options

- **Disable thumbnails** – Unchecked by default. For resources that have one or more attachments of the type with an associated thumbnail, a thumbnail displays to the right of the resource details on the results page. For multiple attachments, this thumbnail rotates through each attachment. An example is shown in Figure 45.

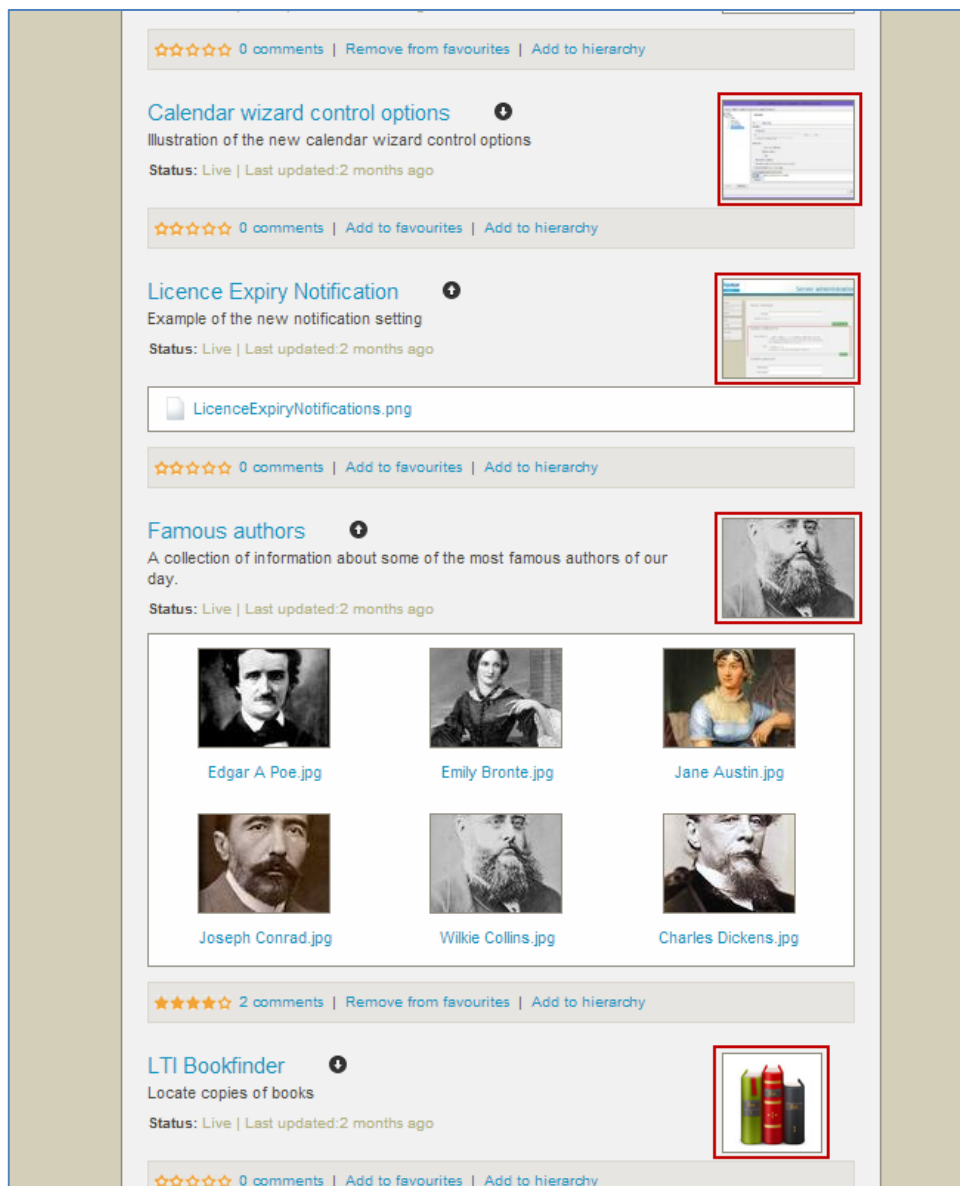


Figure 45 Results page with default thumbnails displayed.

Select the checkbox to remove these thumbnails from the results page.

- **Select the display mode for the attachments view in search results** - when search results display, those with attachment show an ⓘ icon to the right of the resource title. Clicking on the icon lists the attachments in one of the following formats:
 - **Structured view** – this view displays the attachments in a list format, including navigation structures if relevant. An example is shown in Figure 46.

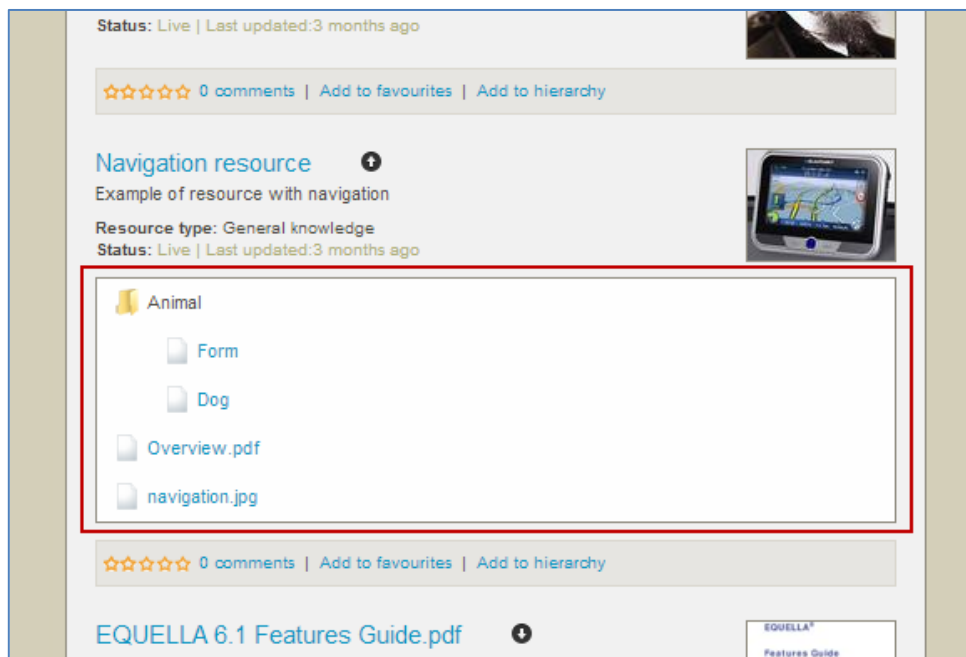


Figure 46 Search results page with Structured view

- **Thumbnail view** – this view displays the attachments as thumbnails. Note that this view is not compatible with CAL/CLA configurations as it doesn't support resource activations, nor does it show navigation structures. An example is shown in Figure 47.

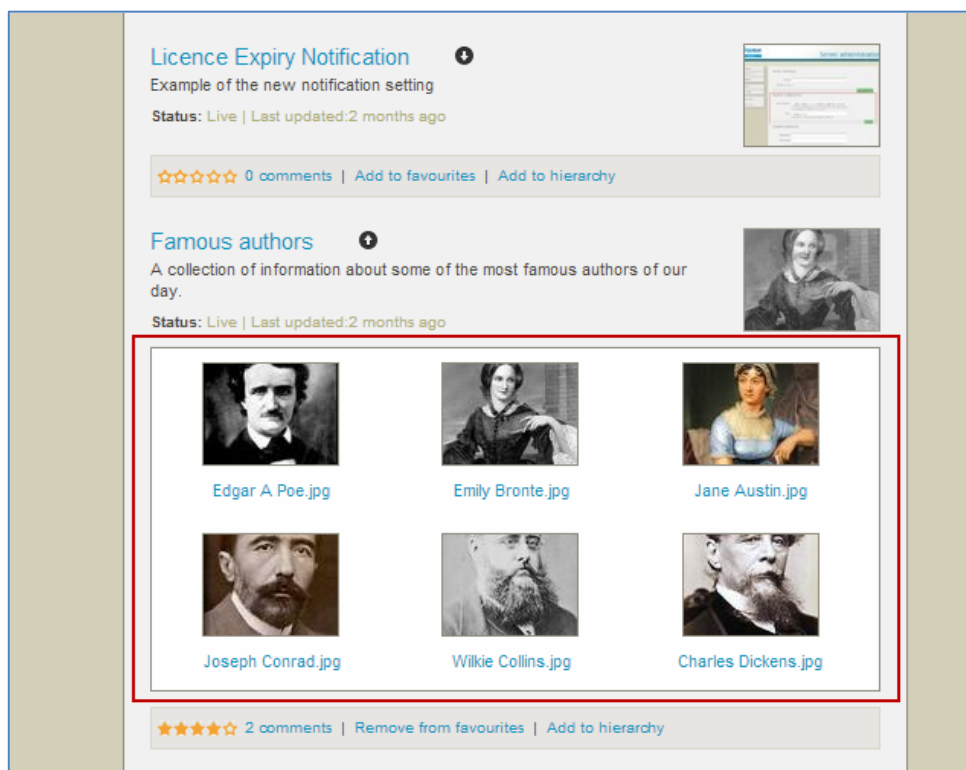





Figure 47 Results page with Thumbnail view

Clicking the ⓘ icon closes the attachment display section.

Adding metadata components

Multiple metadata components can be added to the search results template.

Click  to add a new metadata component. The elements include:

- **Title**—the display name of the field (e.g. *Resource Type*).
- **Value Splitter**—the value used to separate multiple results, such as a comma.
- **Target Node**—click  to navigate to the required metadata node in the metadata schema then click .
- **Type**—select the type of result from the drop-down list. Available values are **Text**, **Date**, **HTML** or **URL**.
- **Truncate Length**—select the maximum number of characters to display. The default is 355.

Use  to move the selected component above its neighbouring sibling.

Use  to move the selected component below its neighbouring sibling.

An example of a search results page with the extra metadata information displayed is shown in Figure 48.



Figure 48 Search results with extra metadata displayed

Metadata mapping

The **Metadata Mapping** page enables the automatic mapping of metadata from a contributed resource or literal value to a particular schema node of the collection schema during contribution.

The sources available for the mapping listed in the drop-down list include:

- IMS Package

- HTML Page Mapper
- Literal Values

Each of these sources is discussed in the following sections.

The mapped nodes are not checked for validity within any given source file. If the mapped nodes do not exist in the contributed resource the mapping is ignored. XML Namespaces are currently ignored in any node path.

IMS package metadata

IMS metadata is read from the IMSManifest.xml file of the IMS package. An example mapping is shown in Figure 49.

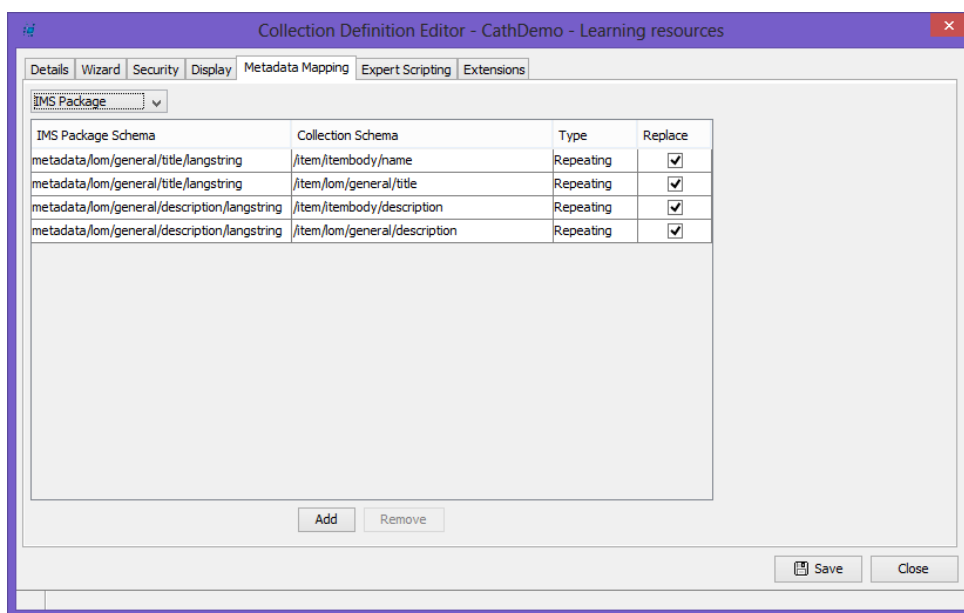


Figure 49 Metadata Mapping page

The controls on the **IMS Package** page include:

A mapping table comprising:

- **IMS Package Schema** column—displays the Xpath to the node that will provide the mapping values.
- **Collection Schema** column—displays the collection schema Xpath for the node accepting the mapped data. Select a cell in this list to display a **Browse** button that when clicked displays the **Select a Schema Node** dialog for selecting the node. Click **OK** to populate the cell with the node Xpath.
- **Type** column—displays the collection node type. Click in the field to display a drop-down list of the following XML node types:
 - **Simple**—copies the data (text) of an IMS schema node to the selected collection schema node. When the IMS node is a parent node all child data is merged before adding to the collection schema node. The IMS node must contain text or have children containing text.

- **Repeating**—creates a new simple XML element under the selected collection schema node for each occurrence of the element in the IMS package schema. The IMS node must contain data (text) or have children containing data (text).
- **Compound**—Copies a node (data and attributes) and all its children to the selected collection schema node.
- **Replace** column—selecting the check box causes the data from the IMS node to replace any data in the Collection Schema node. Unchecking this option causes IMS node data to be appended to any data in the Collection Schema node.

Add button

Click to add a new blank line to the mapping table.

Remove button

Click to remove the currently selected mapping entry.

HTML Page Mapper

The HTML metadata is read from the file's meta tag attributes. The meta tag name attribute is used to identify the correct meta tag and the metadata is provided by the content attribute. An example is shown in Figure 50.

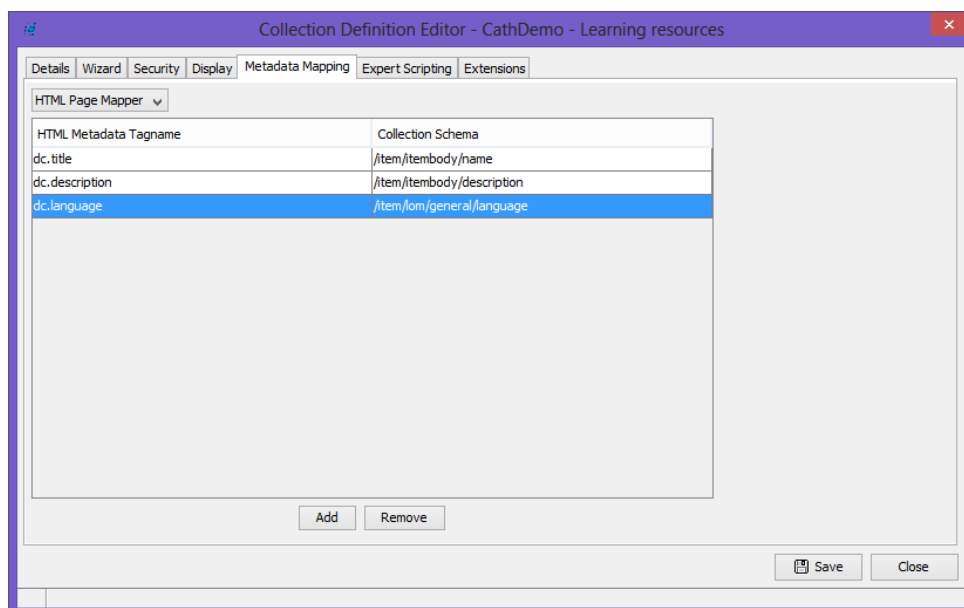


Figure 50 Metadata Mapping—HTML Page Mapper page

The controls used on the **HTML Page Mapper** page include:

A mapping table comprising:

- **HTML Metadata Tagname** column—displays the meta tag name attribute that identifies the meta tag that provides the mapping data. Enter or select the meta tag name.

- **Collection Schema** column—displays the collection schema Xpath for the node accepting the mapped data. Select a cell in this list to display a **Browse** button that when clicked displays the **Select a Schema Node** dialog for selecting the required node. Click **OK** to populate the cell with the node Xpath.

Add button

Click **Add** to add a new blank line to the mapping table.

Remove button

Click **Remove** to remove the currently selected mapping entry.

Literal values

Metadata values can be specified for nodes in the collection schema. These literal values may also be scripted. An example is shown in Figure 51.

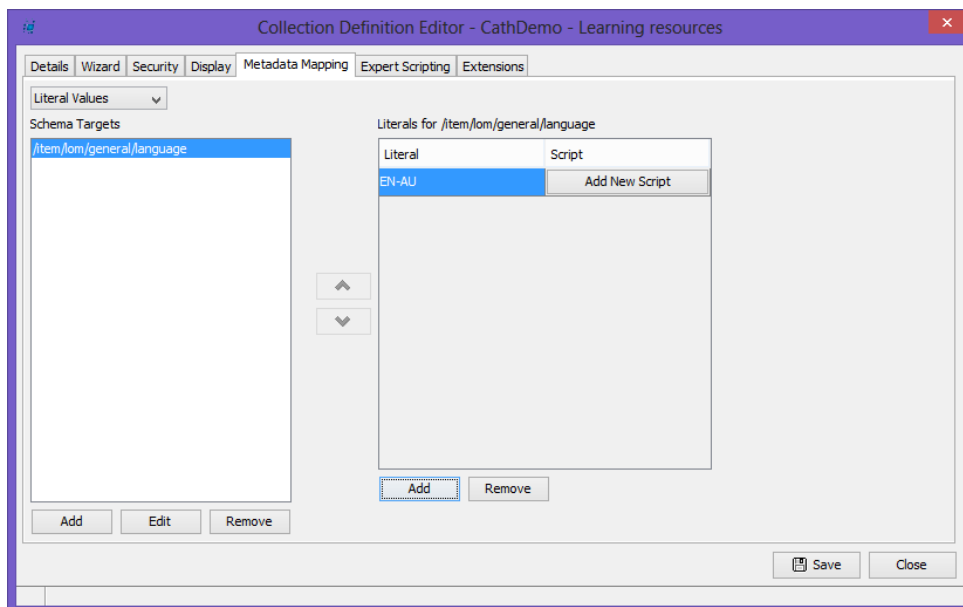


Figure 51 Metadata Mapping—Literal Values page

The controls used on the **Literal Values** page include:

Schema Targets pane

Nodes are displayed with literal values.

- **Add**—click to display the **Schema Picker** dialog then click the **Browse** button to display the **Select a Schema Node** dialog. Select the required node and click **OK** twice to populate the **Schema Targets** pane with the node Xpath.
- **Edit**—enabled when a node is selected. Click to display the **Schema Picker** dialog for selection of a replacement schema node.
- **Remove**—removes the currently selected node.

Literals pane

Displays a table of literal values assigned to the selected Schema Target and associated scripts.

- **Add**—click to display the **Input** dialog. Enter the literal value then click **OK** to return to the Literals pane.
- **Add New Script** / **Edit Script**—click to display the **Script Editor** dialog. Add a new script or edit or remove an existing script. Further information on scripting is provided in the *EQUELLA Scripting Guide (Basic)*.
- **Remove**—removes the currently selected literal value.

Expert Scripting tab

The **Expert Scripting** page provides a simple editor to enter scripts for custom processing of resources that use this collection. An example is shown in Figure 52.

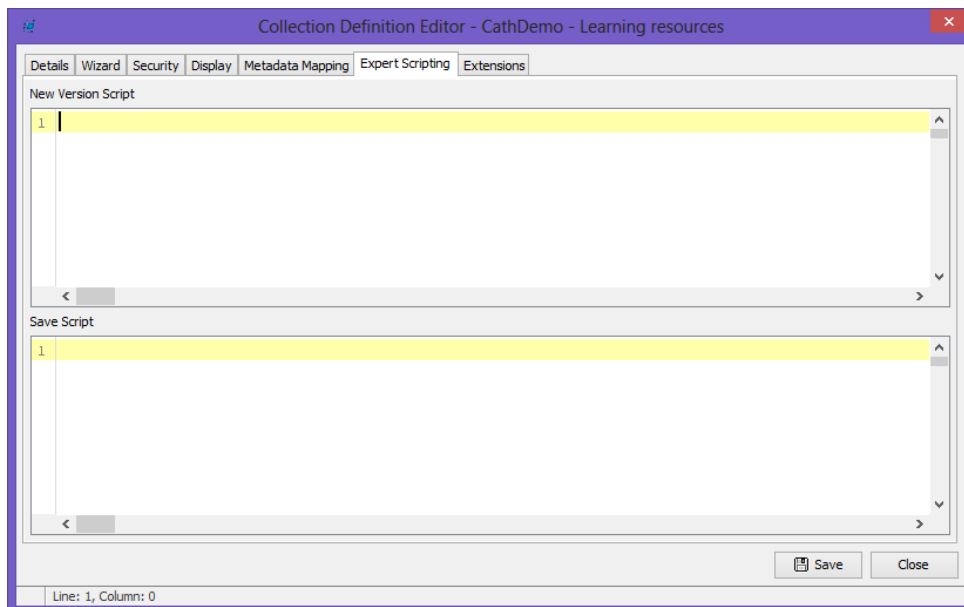


Figure 52 Expert Scripting page

Expert scripts can be entered for collections and executed when the selected events occur for resources associated with the collection. The expert scripting events currently available are:

New Version Script

This script runs when a new version of the resource is created.

Save Script

This script runs when a resource is contributed to the repository, or when a resource is edited and saved.

Further information on scripting is provided in the *EQUELLA Scripting Guide (Basic)*.

Extensions tab

EQUELLA supports use of Australian Copyright Agency Limited (CAL) and the United Kingdom Copyright Licensing Agency Limited (CLA) agreements. The copyright features are configured in the **Extensions** page shown in Figure 53 and provide custom activation error messages and copyright status agreements for display to users.

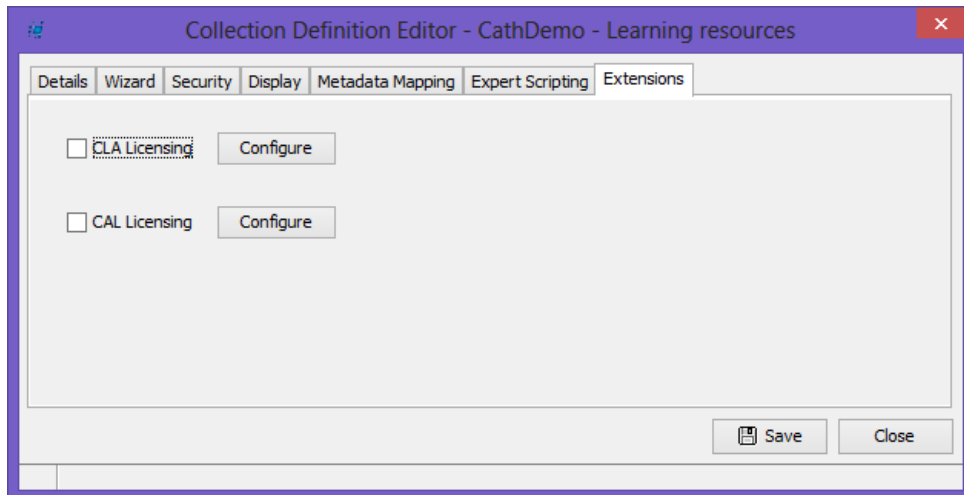


Figure 53 Extensions page

Only collections that require copyright compliance management need to be configured in the Extensions page. Further information is provided in the *EQUELLA Copyright (CAL) and EQUELLA Copyright (CLA) Guides*.

Configure licensing options

Check the appropriate box to select an option depending on your region (e.g. *CAL Licensing*) and click **Configure** to display the licensing dialog. An example is shown in Figure 54.

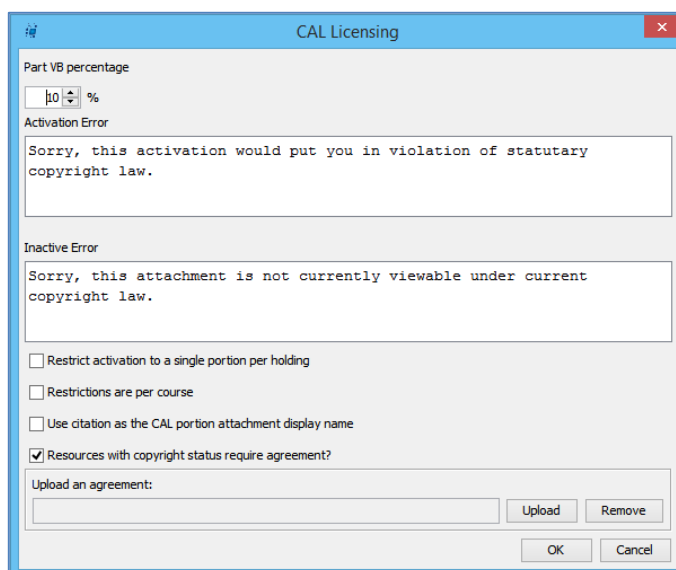





Figure 54 CAL Licensing dialog

- **Error message fields**—the **Activation Error** and **Inactive Error** fields allow for the entry of custom activation error messages.
- **Restrictions**—select the Restrict activation to a single portion per holding or Restrictions are per course check boxes, if required.
- **Upload an agreement**—if a copyright status agreement is available, select the *Resources with copyright status require agreement?* check box to enable the **Upload** and **Remove** buttons in the **Upload an agreement** section.
 - —click to browse the local directory for an agreement.
 - —click to remove the currently uploaded agreement.
- —click to save copyright settings and return to the **Extensions** page.

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>.