EQUELLA®

Copyright (CAL & CLA) Enhancements

Version 6.3

Document History

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Overview

A number of changes and additions have been developed within the CAL module for the EQUELLA 6.3 release. These features are documented below.
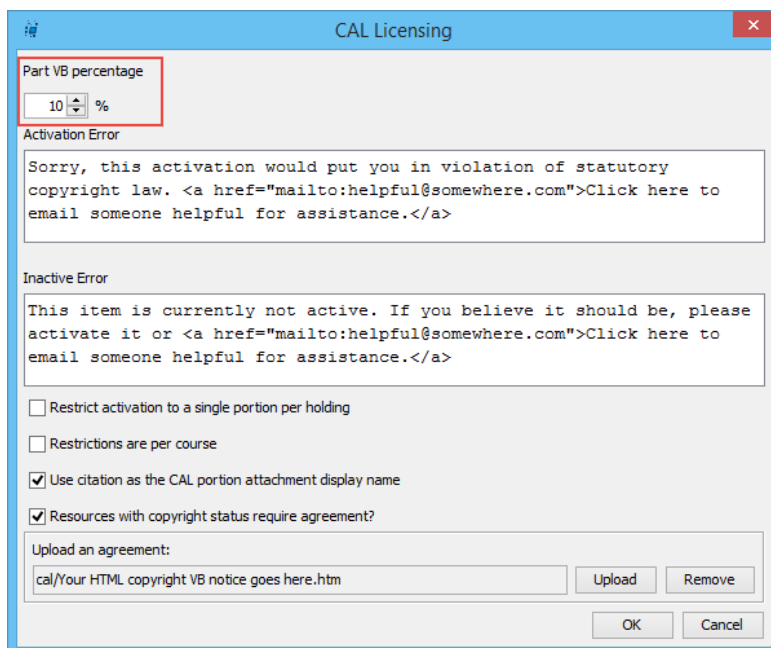
Set Part VB book percentage (CAL only)

Administrators now have the ability to set the Part VB book percentage at a book collection level for their Books collection/s. The default is 10%.

The new option is found on the **CAL Licensing** page, which is accessed from the Admin Console, Collection Definition Editor. Select the required holding collection (e.g. Books), then click on the **Extensions** tab. Select the CAL Licensing [Configure] button.

*NOTE: This option must be selected on the **holding** collection (e.g. Books) CAL licensing page. Setting this on the portion collection (e.g. eReserve articles) won't affect the percentage.*

An example is shown in Figure 1.

Figure 1 CAL Licensing page - New Part VB percentage option

Note that using the arrows will increase and decrease the current value by one whole number (e.g. 10 to 11) but one decimal place can be manually entered (e.g. 10.5, 12.2 etc.).

Override CAL book percentage rule at time of activation (CAL only)

A new ACL (**COPYRIGHT_OVERRIDE**) is available which, when granted to users, allows those users to override the copyright warning which would cause a possible breach of the copyright rule and prevent an activation from proceeding.

When granted, the user is able to choose to ignore the warning and proceed with the activation after entering text to explain the reason for the override. The warning informs the user what the total percentage of activations for the book will be if the user proceeds.
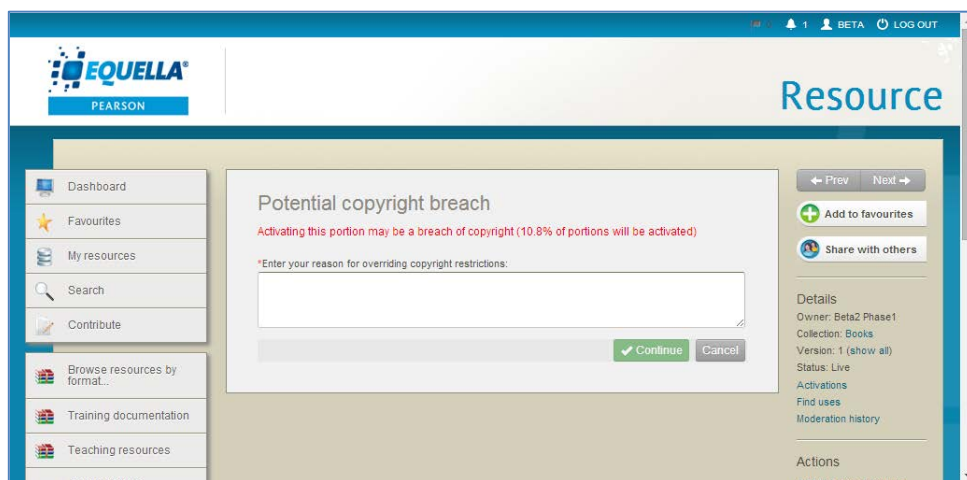
An example is shown in Figure 2.

Figure 2 Copyright override message

Note that the **Continue** button is disabled at this point. Once the reason for overriding the copyright restriction is entered, the Continue button is enabled. An example is shown in Figure 3.
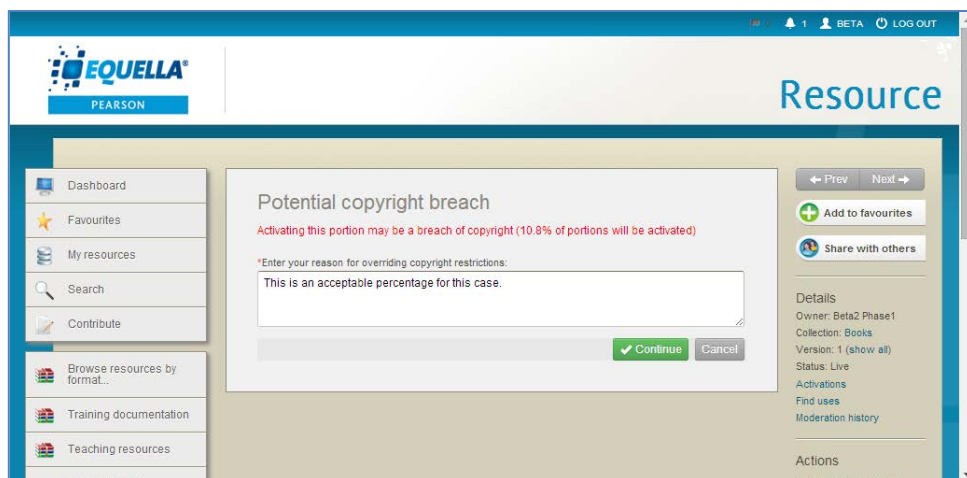

Figure 3 Copyright override message with reason entered and Continue button enabled

Edit activation details

A new ACL (**EDIT_ACTIVATION_ITEM**) is available which, when granted to users, allows those users to edit Activation details. The following table shows which properties can be edited per activation status:

Status	Course	Activate from	Activate until
Pending	Yes	Yes	Yes
Active	No	No	Yes

The **Edit activation** page is accessed from the **Activations** link found in the *Details* section on the Resource summary page. It can be accessed from the Book or Journal (holding) record summary page, which lists all the Chapter, Excerpt or Article activations for that holding record, or it can be accessed from the portion record summary page, which will only show activations for that portion. An example is shown in Figure 4.
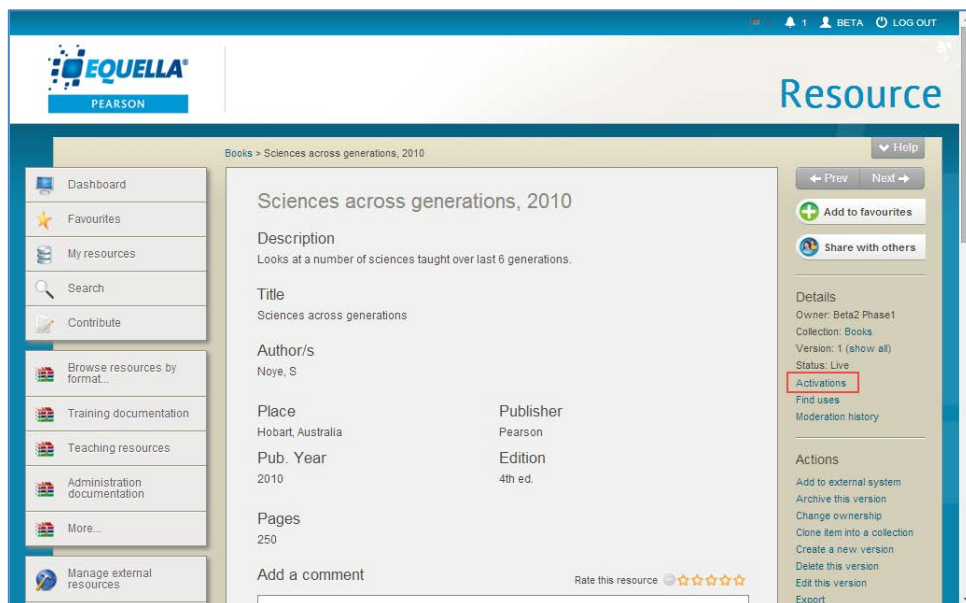

Figure 4 Resource summary page - activations link

Click the **Activations** link to open the **Activations** page. An example is shown in Figure 5.
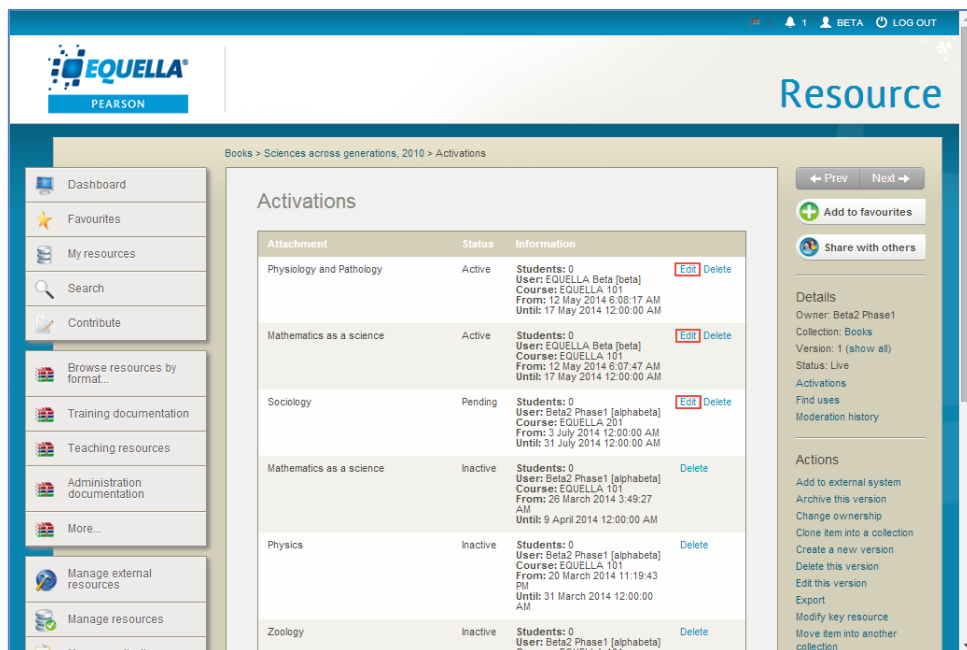
Figure 5 Activations page

When the **EDIT_ACTIVATION_ITEM** ACL is granted, users see a new **Edit** link beside *Active* and *Pending* activations. Click the **Edit** link to open the **Edit Activation** page. An example using a *Pending* activation is shown in Figure 6.
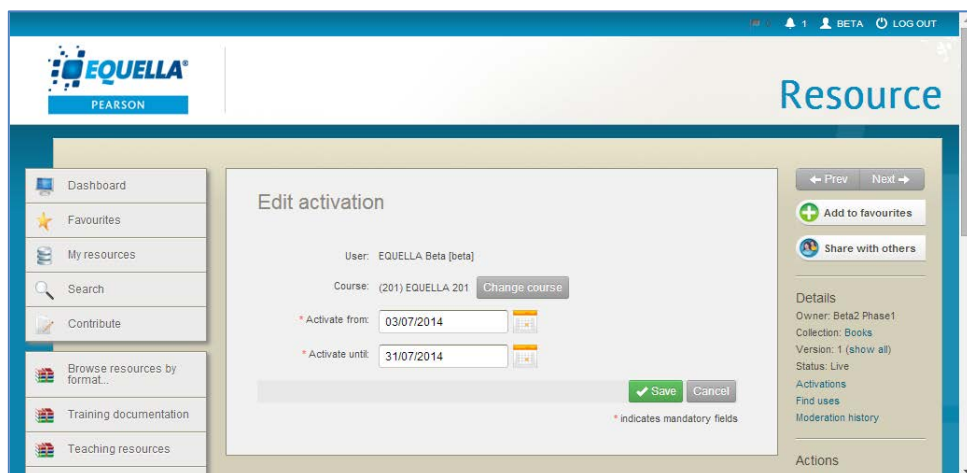

Figure 6 Edit activation page for a pending activation

Note that the **Course**, **Activate from** and **Activate until** fields can all be edited for a *Pending* activation.

An example using an *Active* activation is shown in Figure 7.

Figure 7 Edit activation page for an active activation

Note that only the **Activate until** field can be edited for an *Active* activation.

New course selector on Activation dialog

The Course drop-down list has been replaced with a Course search on the **Activate attachments** page. An example is shown in Figure 8.

Figure 8 Activate attachments page - Select course button

Click the [Select course] button to open the **Select a course** dialog. An example is shown in Figure 9.
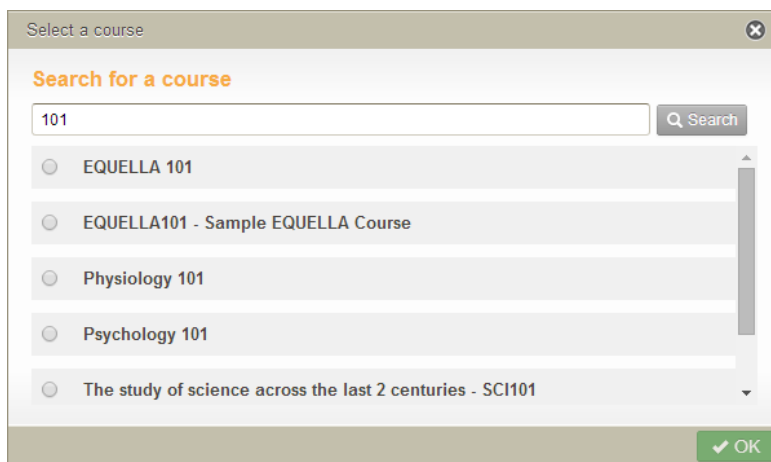
Figure 9 Select a course dialog - enter search text

Enter one or more characters of the **Course name** then click [Q Search]. Matching results display and one can be selected. Wildcards are not necessary. For example, entering ***ogy*** will return any results that contain that string in their name. Similarly, entering one letter (e.g. ***c***) will return any courses containing the letter 'c' anywhere in their name.

Activation details displayed in XML (CAL only)

Activation details are now stored in the portion item's unified xml, as listed below:

- activation status
- portion UUID
- attachment UUID
- course name
- course code
- activation start date
- activation end date
- citation

An example is shown in Figure 10.

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```xml
▼<activations>
  ▼<activation status="Inactive" uuid="99fe9ad3-5429-439a-beb6-5b0699092fde">
      <attachment>ef40702c-194e-49a2-ba57-5d862a7a9ced</attachment>
      <coursename>EQUELLA 101</coursename>
      <coursecode>101</coursecode>
      <startdate>2014-05-12 06:08:17.094</startdate>
      <enddate>2014-05-17 00:00:00.0</enddate>
    ▼<citation>
        'Physiology and Pathology' 2010 in Noye, S, <b><i>Sciences across generations</i></b>, 4th ed., Pearson, Hobart, Australia, pp. 179-190.
      </citation>
    </activation>
  ▼<activation status="Inactive" uuid="9ff97162-e0a7-485f-a3ed-03bea8110882">
      <attachment>ef40702c-194e-49a2-ba57-5d862a7a9ced</attachment>
      <coursename>Physiology 101</coursename>
      <coursecode>P101</coursecode>
      <startdate>2014-05-20 05:32:56.192</startdate>
      <enddate>2014-05-24 00:00:00.0</enddate>
    ▼<citation>
        'Physiology and Pathology' 2010 in Noye, S, <b><i>Sciences across generations</i></b>, 4th ed., Pearson, Hobart, Australia, pp. 179-190.
      </citation>
    </activation>
  ▼<activation status="Active" uuid="6175bccf-2cb7-4b75-91a8-d4f0b6a09c11">
      <attachment>cba8913f-ad88-4f4c-af4c-9c172cfd2b0a</attachment>
      <coursename>General Science Studies</coursename>
      <coursecode>123</coursecode>
      <startdate>2014-05-26 06:38:56.691</startdate>
      <enddate>2014-07-31 00:00:00.0</enddate>
    ▼<citation>
        'Physiology and Pathology' 2010 in Noye, S, <b><i>Sciences across generations</i></b>, 4th ed., Pearson, Hobart, Australia, pp. 179-190.
      </citation>
    </activation>
  </activations>
```

Figure 10 Activation details in portion record's unified XML

Citation display options (CAL only)

The citation can now be displayed on the resource summary page for a portion, in addition to the search results page. Additionally, administration users can choose to use the citation as the attachment display link both on the summary page and in the LMS as an alternative to the attachment display name.

Display citation on Resource summary page

A new option on the **Resource Summary Display Template** tab of the *Display* tab in the Collection Definition Editor for the appropriate collection (e.g. *eReserve articles*) allows users to add the CAL citation to the Resource summary page. An example is shown in Figure 11.
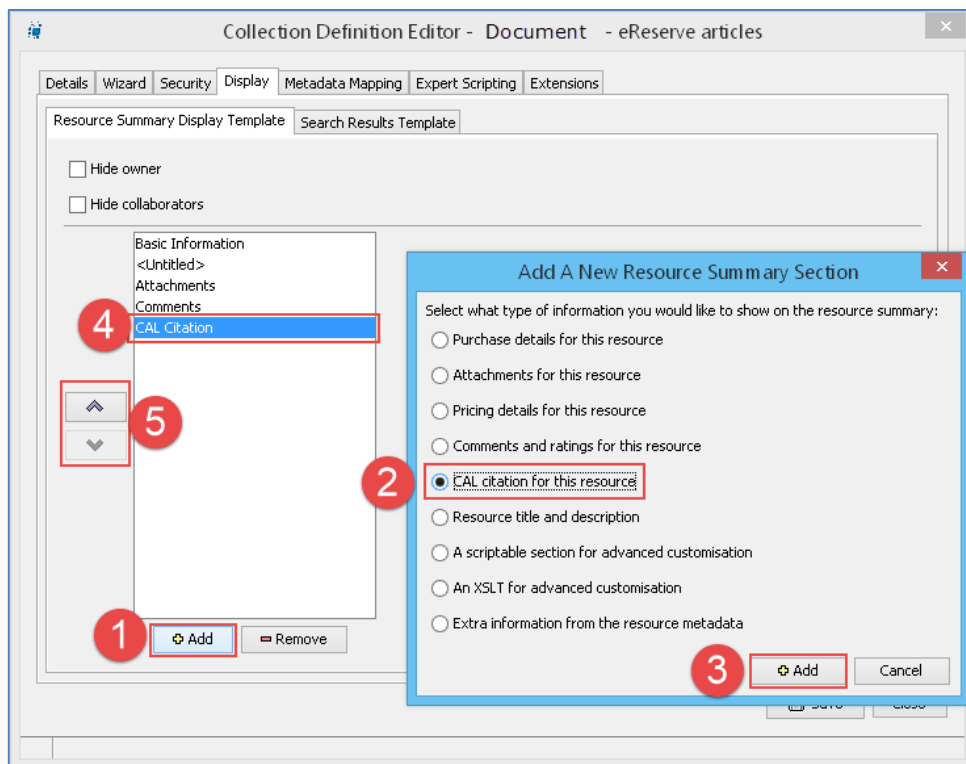
Figure 11 Add the CAL Citation to the Resource Summary Display Template

Once the **CAL citation for this resource** section has been added, it can be reordered to appear in the appropriate place on the Resource summary page using the reorder buttons.

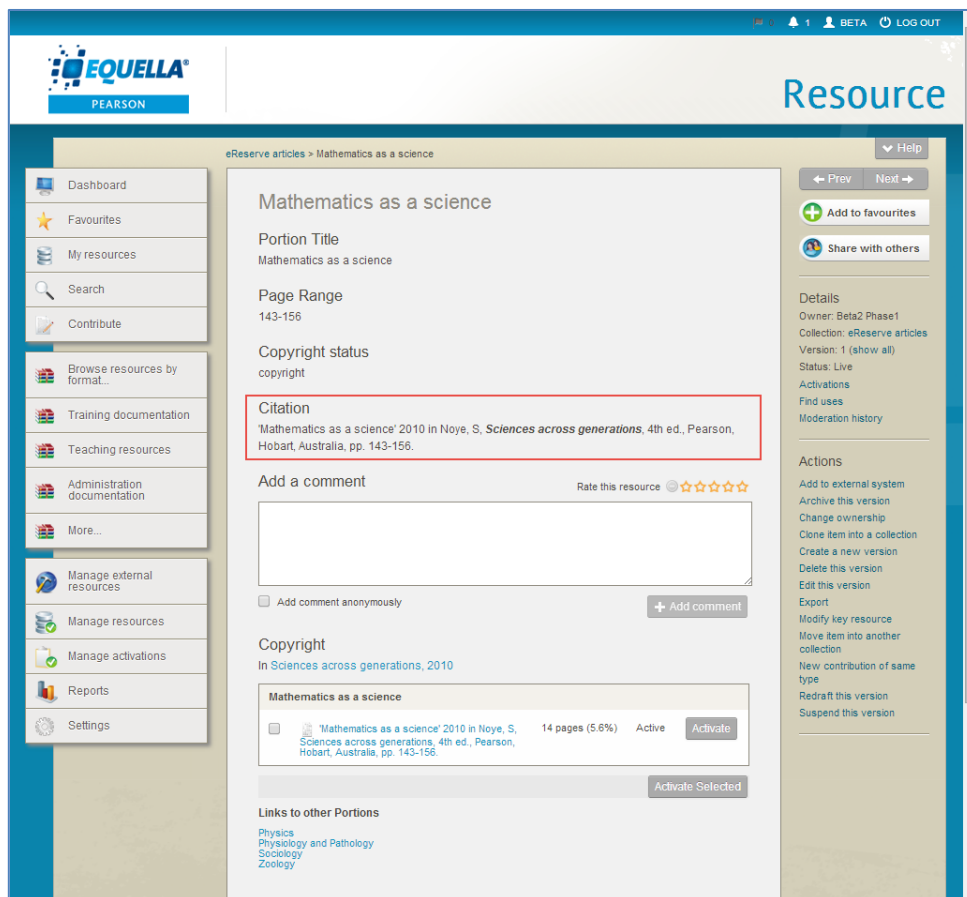An example with the citation displaying on the Resource summary page is shown in Figure 12.

Figure 12 Resource summary page with Citation displaying

Display citation as attachment display link

Administration users can now choose to use the citation as the portion attachment display name instead of the attachment title. The citation will then display as the attachment link both on the Resource summary page and in the LMS Course. An example of the citation showing as the attachment display name on the portion Resource summary page is shown in Figure 13 and in the LMS Course (Moodle) is shown in Figure 14.
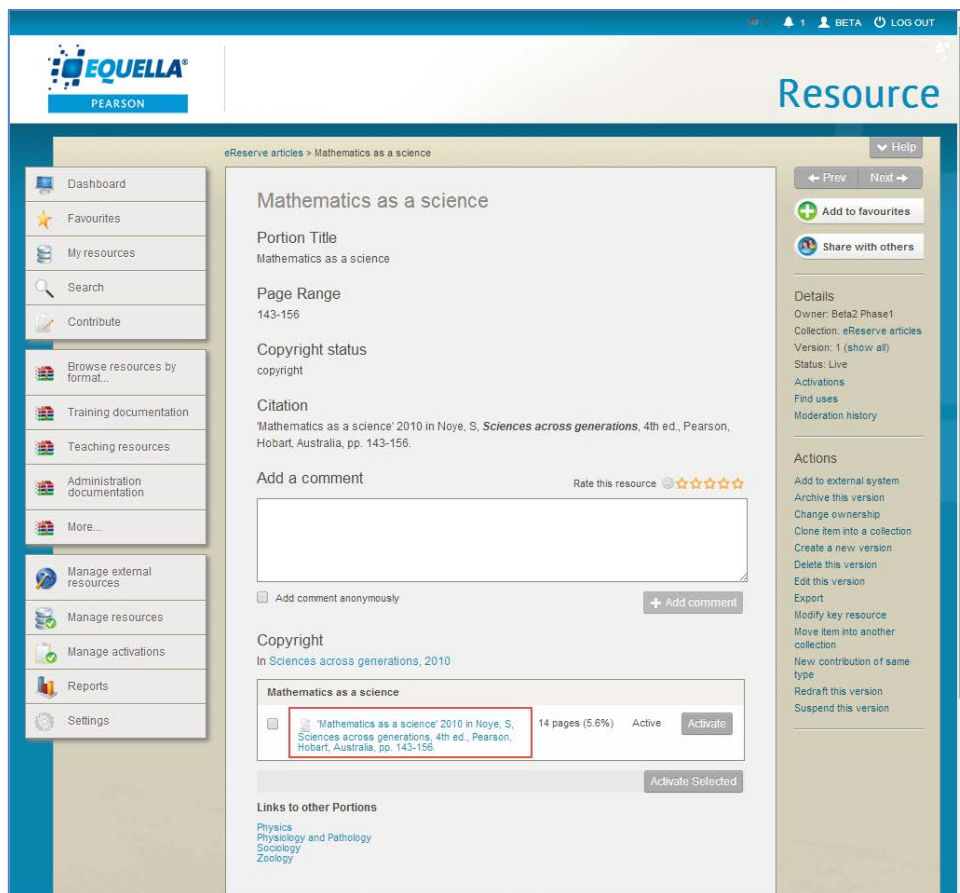
Figure 13 Portion Resource summary page with citation as display name link
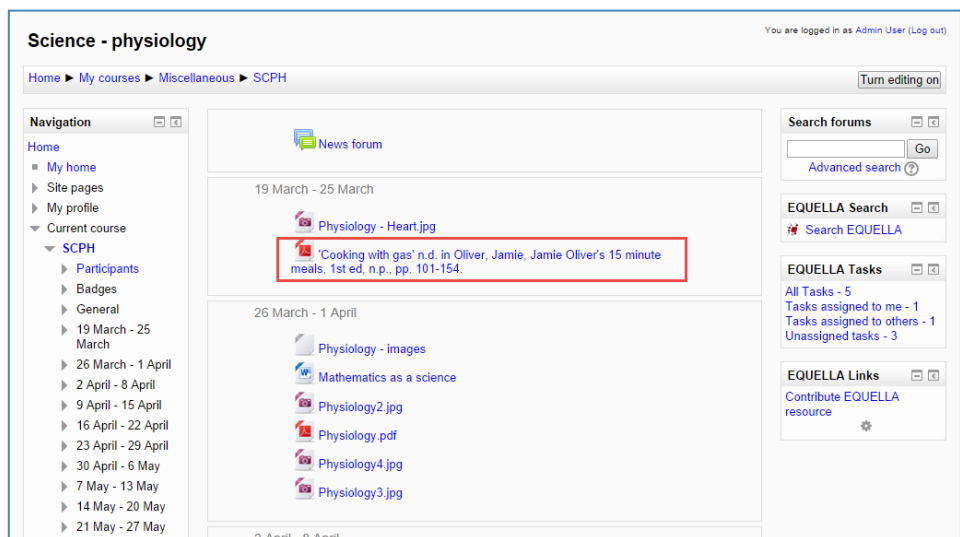
Figure 14 Moodle course with citation as display name link

The new option is found on the **CAL Licensing** page, which is accessed from the Admin Console, Collection Definition Editor. Select the required portion collection (e.g. eReserve articles), then click on the **Extensions** tab. Select the CAL Licensing [Configure] button.

*NOTE: This option must be selected on the **portion** collection (e.g. eReserve articles) CAL licensing page. Setting this on the holding collection (e.g. Books) won't change the display format.*

An example is shown in Figure 15.
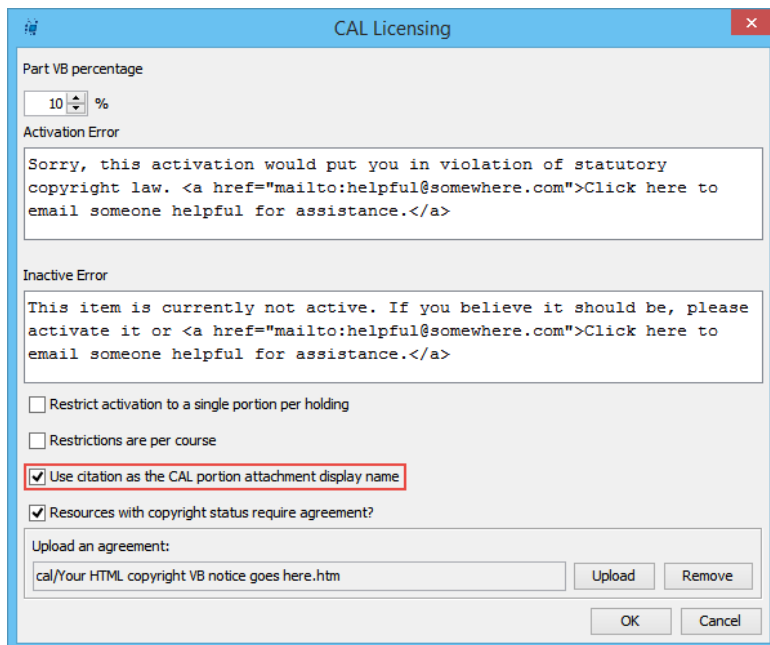
Figure 15 CAL licensing page - new citation display name option

Restrict 'View linked portions' section

A new ACL is available (**VIEW_LINKED_PORTIONS**) that allows administrators to restrict who has access to the **Links to other Portions** section displayed on the portion record Resource summary page. An example is shown in Figure 16.

Figure 16 Resource summary page - Links to other Portions

When upgrading to EQUELLA 6.3, this ACL will default to be granted to all users (as per current functionality). Revoking this ACL for users results in those users no longer seeing that section on the portion summary page. An example is shown in Figure 17.
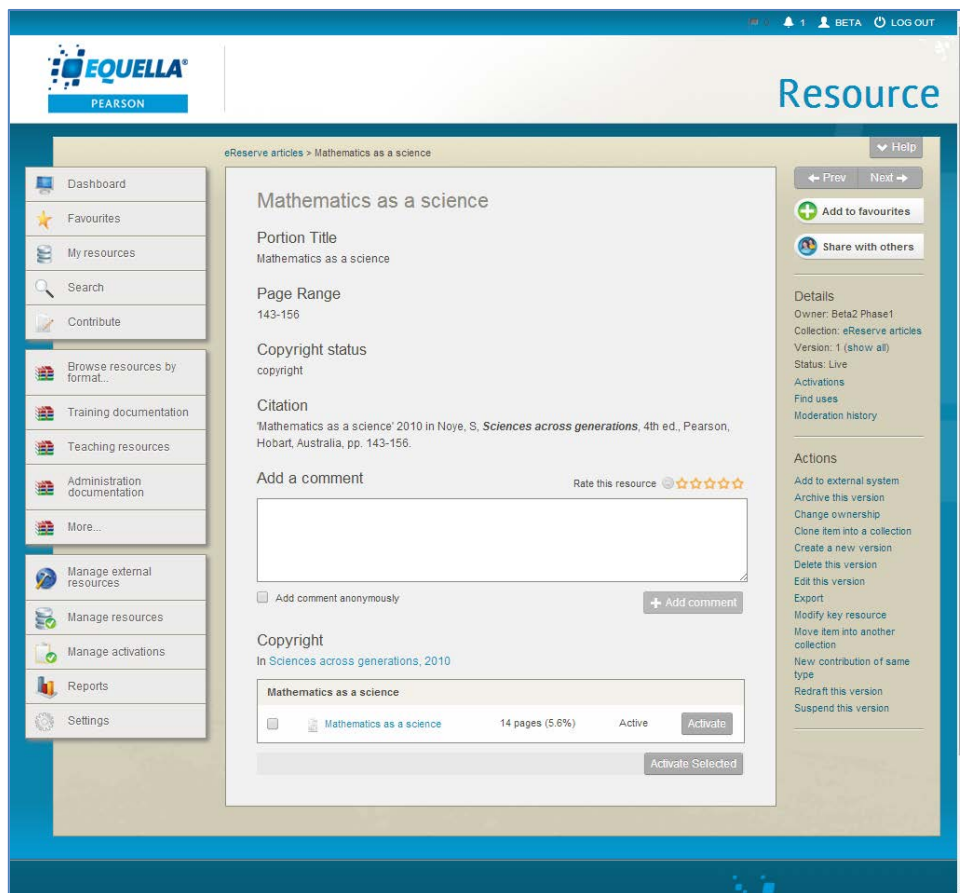
Figure 17 Portion summary page without Links to other Portions section

Additionally, when this ACL is revoked, users will no longer see the **(View portion)** link for each portion from the holding record Resource summary page. An example of a Book holding record summary page with the ACL granted is shown in Figure 18 , and with the ACL revoked is shown in Figure 19.

Figure 18 Book record summary page - (view portion) displayed

Figure 19 Book record summary page - (view portion) not displayed

View inactive attachments

A new ACL is available (**VIEW_INACTIVE_PORTIONS**) that allows administrators to grant the ability to view portion attachments that are not active.

As a standard, only activated attachments can be clicked on to open and view the content. Other portion attachments for a holding record don't show as a link, and can't be opened and viewed. An example is shown in Figure 20.

Figure 20 Parent record with only activated attachments displaying as clickable links

Granting the **VIEW_INACTIVE_PORTIONS** ACL to users allows those users to open and view all portion attachments regardless of their status (Inactive, Pending and Active) by always displaying them as clickable links.

An example of the same page as shown in Figure 20 with the ACL granted is shown in Figure 21.

Figure 21 Parent record with all attachments (regardless of status) displaying as clickable links

Remaining number of pages available for activation

A new statistic (**Pages available for activation)** has been added to the holding record summary page which indicates how many pages could be activated before the Part VB percentage had been reached. An example is shown in Figure 22.

Figure 22 Holding record summary page — new statistic

Autocreate courses

A new ACL is available (**AUTO_CREATE_COURSE**) that allows administrators to grant users the ability to create a course automatically in EQUELLA when activating items for a course through a Moodle or Blackboard integration selection session.

When a user opens the integration screen selection session from a course section, goes to a portion summary page and selects the **Activate and add** button, EQUELLA looks at the course code from the LMS, then matches it with a course code in EQUELLA. If there is no matching course code in EQUELLA, a message displays conveying this information, and the user can't proceed with the activation and addition to the course section. When users are granted the **AUTO_CREATE_COURSE** ACL, the system will automatically add a course record to EQUELLA, using the course code from the LMS as the *Course Name* and *Code.*

NOTE: When using this feature, Administrators will need to monitor Courses to update automatically created records with required details.

An example is shown in Figure 23.
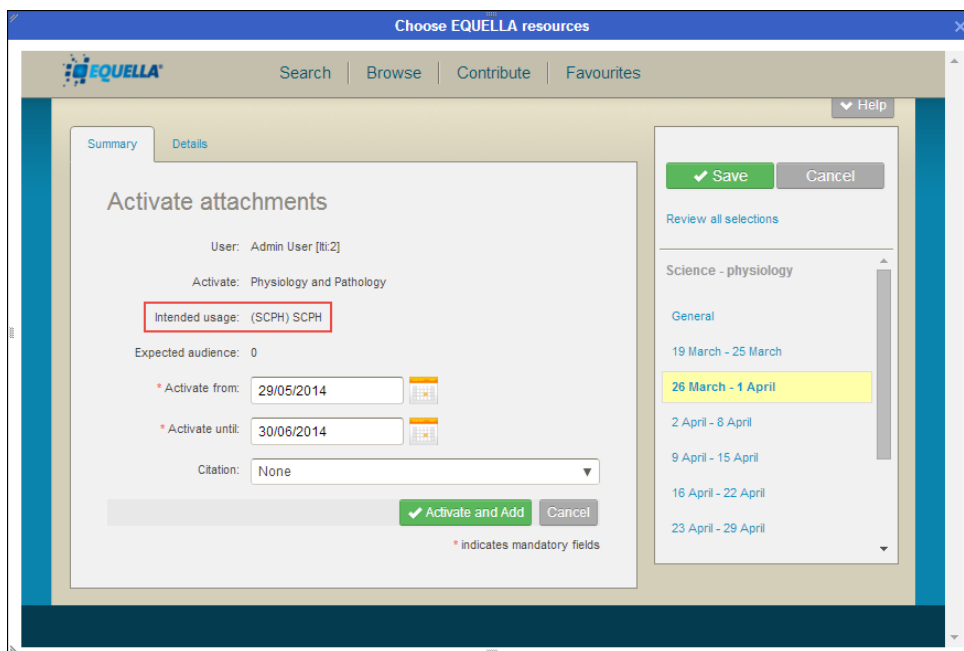
Figure 23 Activate attachment with automated course creation

A record is added to the Course table in EQUELLA with the Course Name and Code being the Course ID from the LMS. An example is shown in Figure 24.
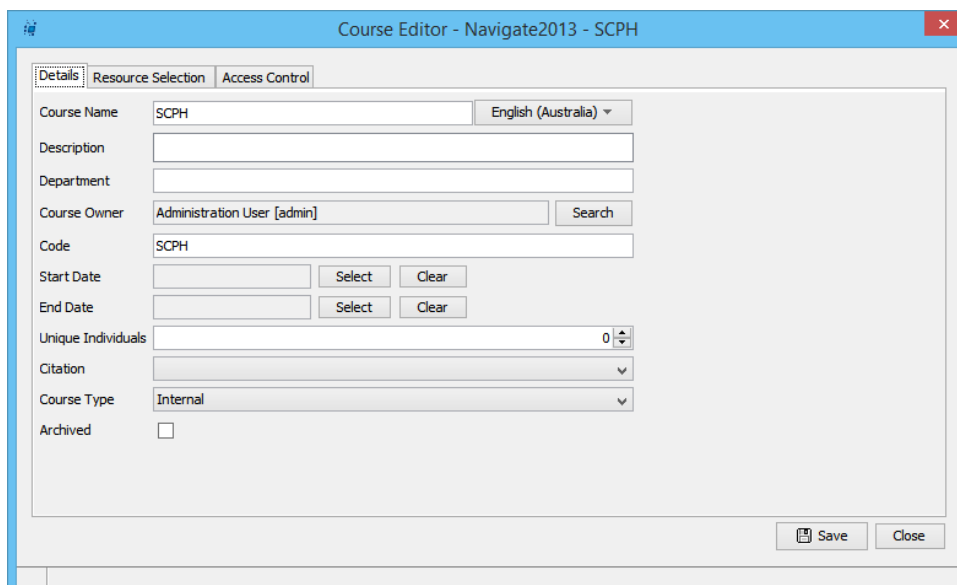
Figure 24 Administration console - Courses – Automatically added course

Rollover enhancements

EQUELLA 6.3 introduces enhancements to the activation rollover functionality accessed from *Manage Activations.*

On the **Bulk actions**, **Rollover activations** dialog, there is a new option (**Use activation's current course code**) in the *Course to roll-over to* drop-down box. By selecting this option, all activations selected in the session will be rolled-over to the

current course stored in the selected activations. An example of this option is shown in Figure 25.
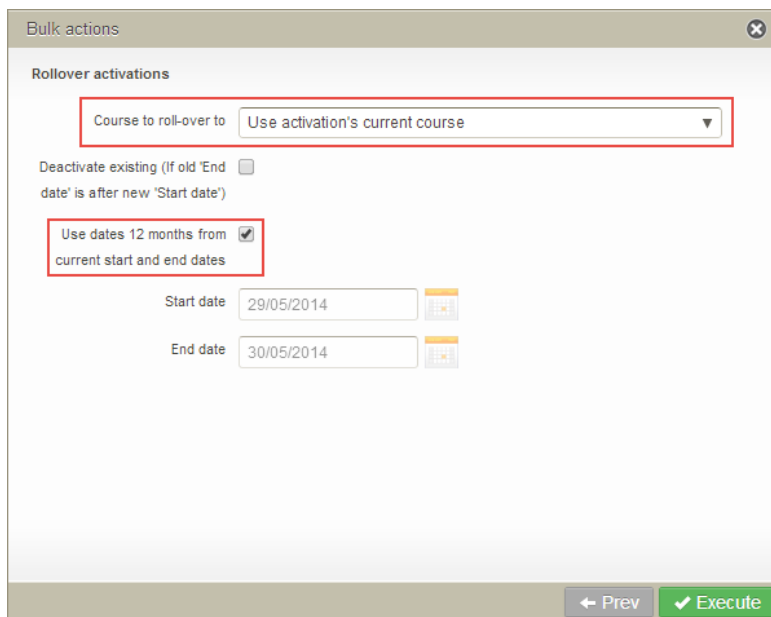
Figure 25 New options on Rollover activations dialog

Additionally, the new option **Use dates 12 months from current start and end dates** has been added. Selecting this option will rollover the selected activations using the same dates stored in the activations, but in the following year. Once the checkbox is selected, the *Start date* and *End date* fields are no longer available for selection.

Filter by activation status

A new filter (**Filter by activation status)** has been added to the **Manage activations** filter options, allowing users to filter by *Active*, *Pending* and *Inactive* activations. An example is shown in Figure 26.

Figure 26 Filter by activation status

Extra fields added to Z39.50 search results

The search results template for Z39.50 searches has been updated, and now shows the following fields, if available:

- **Title**
- **Author/s**
- **Edition** – does not show for 1st editions
- **ISBN**
- **Publisher**
- **Publish date**

An example is shown in Figure 27.

Results
Showing 1 to 10 of 135 results
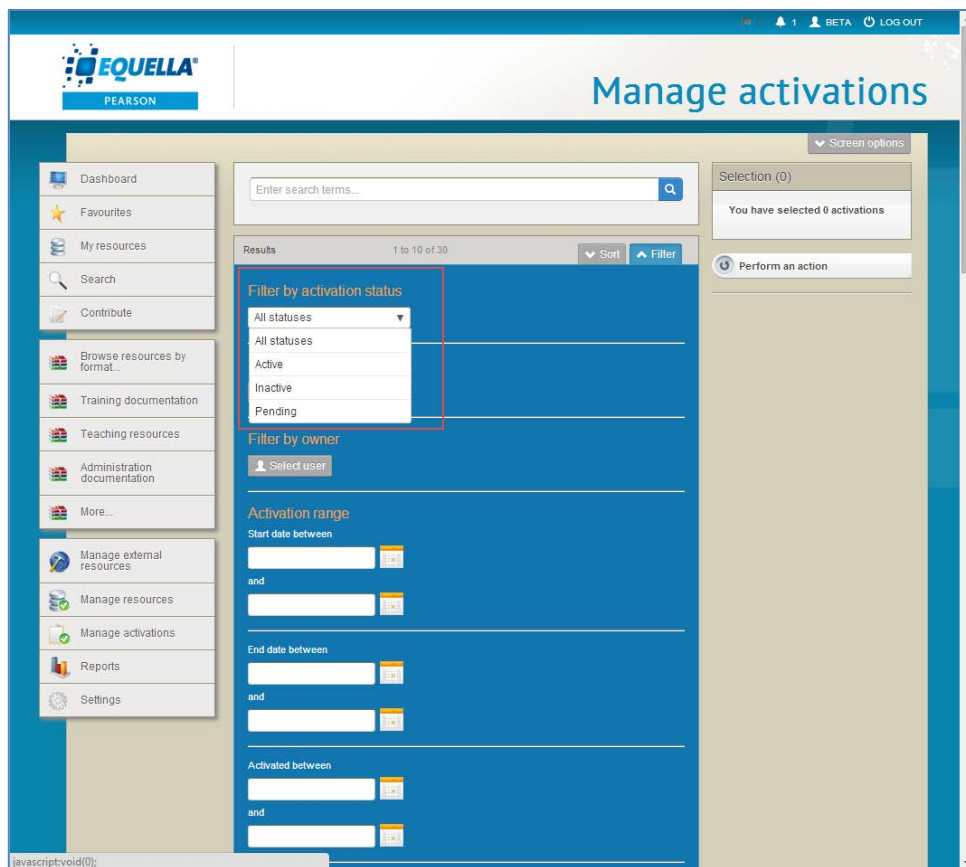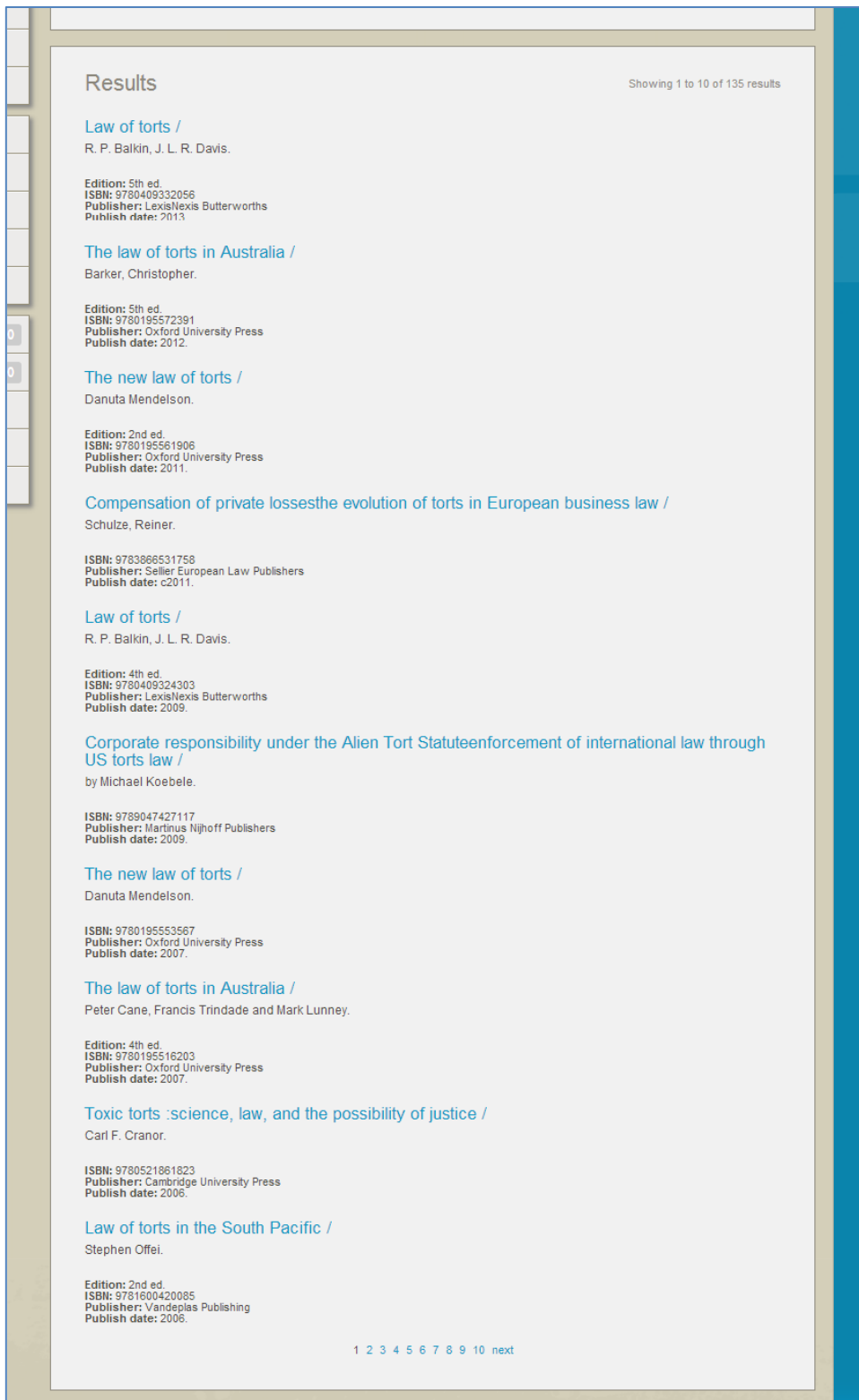
Law of torts /
R. P. Balkin, J. L. R. Davis.

Edition: 5th ed.
ISBN: 9780409332056
Publisher: LexisNexis Butterworths
Publish date: 2013

The law of torts in Australia /
Barker, Christopher.

Edition: 5th ed.
ISBN: 9780195572391
Publisher: Oxford University Press
Publish date: 2012.

The new law of torts /
Danuta Mendelson.

Edition: 2nd ed.
ISBN: 9780195561906
Publisher: Oxford University Press
Publish date: 2011.

Compensation of private lossesthe evolution of torts in European business law /
Schulze, Reiner.

ISBN: 9783866531758
Publisher: Sellier European Law Publishers
Publish date: c2011.

Law of torts /
R. P. Balkin, J. L. R. Davis.

Edition: 4th ed.
ISBN: 9780409324303
Publisher: LexisNexis Butterworths
Publish date: 2009.

Corporate responsibility under the Alien Tort Statuteenforcement of international law through US torts law /
by Michael Koebele.

ISBN: 9789047427117
Publisher: Martinus Nijhoff Publishers
Publish date: 2009.

The new law of torts /
Danuta Mendelson.

ISBN: 9780195553567
Publisher: Oxford University Press
Publish date: 2007.

The law of torts in Australia /
Peter Cane, Francis Trindade and Mark Lunney.

Edition: 4th ed.
ISBN: 9780195516203
Publisher: Oxford University Press
Publish date: 2007.

Toxic torts :science, law, and the possibility of justice /
Carl F. Cranor.

ISBN: 9780521861823
Publisher: Cambridge University Press
Publish date: 2006.

Law of torts in the South Pacific /
Stephen Offei.

Edition: 2nd ed.
ISBN: 9781600420085
Publisher: Vandeplas Publishing
Publish date: 2006.

1 2 3 4 5 6 7 8 9 10 next

Figure 27 Example of Z39.50 search results template

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