

EQUELLA[®]

Wizard Controls Reference Guide

Version 6.4

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Wizard controls overview

The EQUELLA Administration Console enables the creation and customisation of a variety of user wizards. Each of these wizards contains a range of controls that translate to checkboxes, buttons and fields etc. to prompt users to input text, make selections, upload files and various other actions.

The purpose of this reference guide is to describe the controls available to contribution wizards; where and why each control is used and how they are configured in the Administration Console **Collection Definition Editor**. Some of the wizard controls are also used to configure advanced searches in the Administration Console **Advanced Search Editor** and these controls are referenced accordingly.

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. Information on institution management is provided in the *EQUELLA Installation and Administration Guide*.

Wizard controls

Wizard controls are configured in the Administration Console. A choice of controls can be added to:

- **Contribution wizards**—created in the **Collection Definition Editor**. Refer to the *EQUELLA Collection Definitions Configuration Guide* for information on the editor.
- **Advanced search wizards**—created in the **Advanced Searches Editor**. Refer to the *EQUELLA Advanced Search Configuration Guide* for information on the editor.

All wizard controls can be added to a contribution wizard while an Advanced search wizard can contain only the following controls:

- Calendar
- Check Box Group
- Edit Box
- Group Selector
- List Box
- Radio Button Group
- Raw HTML
- Role Selector
- Shuffle Box
- Shuffle List
- Term Selector
- User Selector

The Collection Definition Editor (an example is shown in Figure 1) and the Advanced Search Editor contain common configuration elements such as the **Hierarchy** pane (also

known as the **Control list pane** in the Advanced Search Editor) and the **Control Editor** pane.

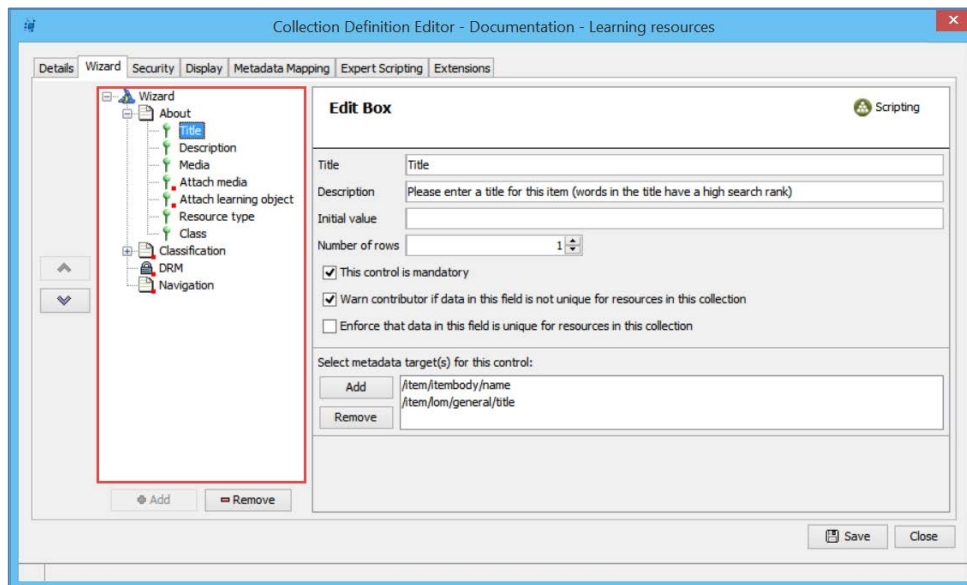










Figure 1 Collection Definition Editor – Hierarchy pane

Hierarchy pane

Wizard controls are added to the **Hierarchy** pane located on the left-hand side of the editor.

In the Collections Definition Editor, the hierarchy provides the structure for the controls that make up the wizard. All controls are added as children of the selected control node, with the exception of the **DRM (Digital Rights Management)**, **Navigation Builder**, **Page** and **Static Metadata** controls which are always added as new root elements in the hierarchy.

Wizard control icons within the Hierarchy pane are:

-  DRM (Digital Rights Management)
-  Navigation Builder
-  Page
-  Static Metadata
-  Group, Repeater or Shuffle Group
-  Group Item (*NOTE: The **Group Item** control can only be added as a child of the **Group** control node.*)
-  Basic Control
-  Basic Control with an associated script

In the Advanced Search Editor, only basic controls can be added and they are listed by title. An example is shown in Figure 2.

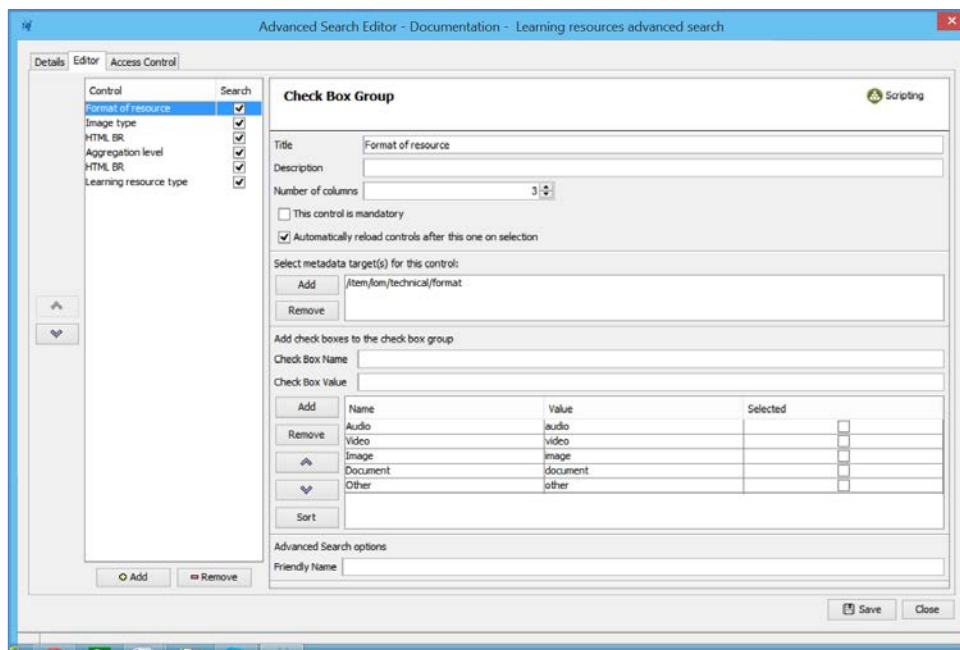


Figure 2 Advanced Search Editor

Control Editor pane

The Control Editor pane is located on the right-hand side and displays the details of the control currently selected in the Hierarchy pane. The contents of this pane are dependent on the control that is selected. An example is shown in Figure 3.

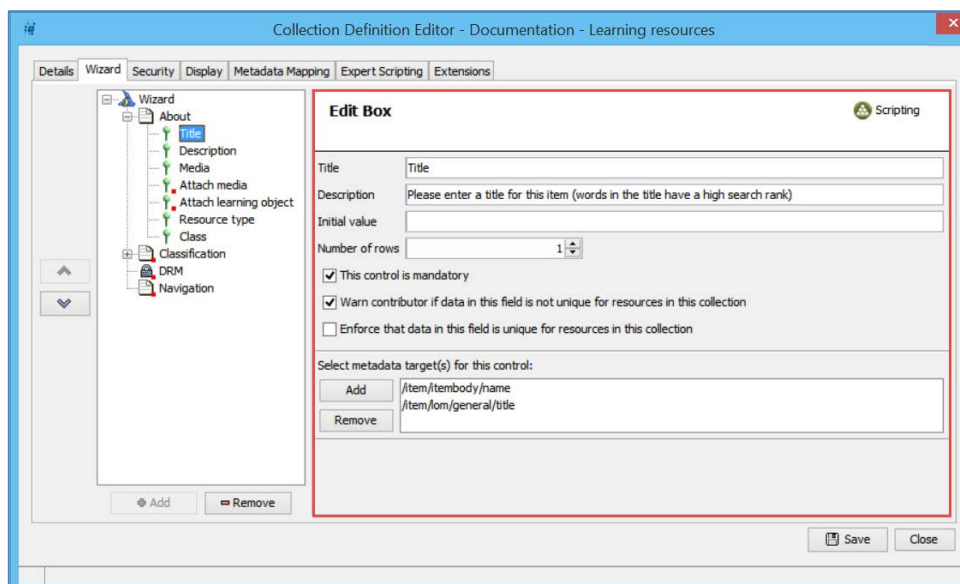


Figure 3 Collection Definition Editor – Control Editor pane

Common control elements

To maintain control configuration consistency, some panes, fields and buttons are common to many controls. This section describes these common elements. Control-specific elements are described in the section detailing the individual control.

Title

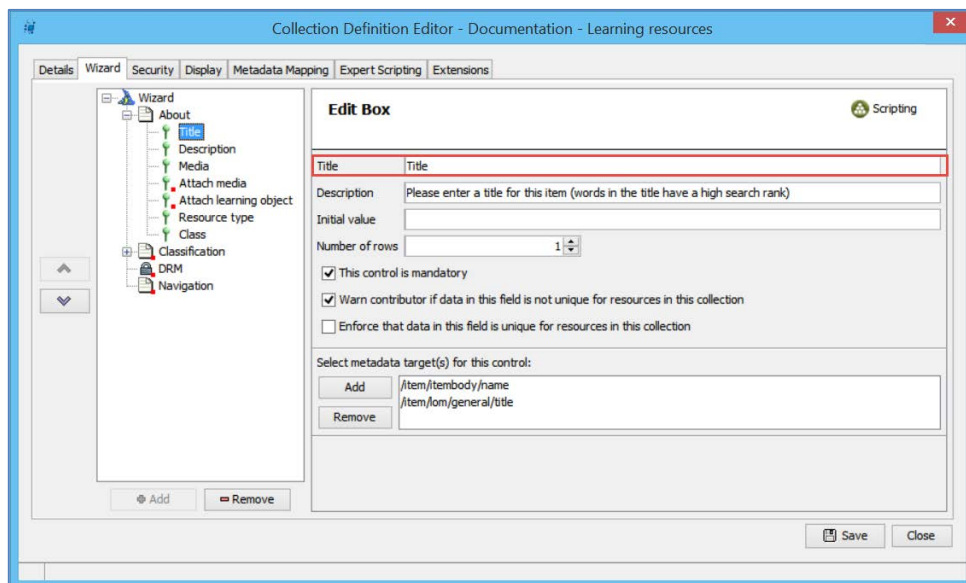


Figure 4 Title field

Enter a succinct and descriptive title name for the control (e.g. *Title*) in the **Title** field. HTML tags such as `` can be used if required. The title is displayed to users above the control.

Description

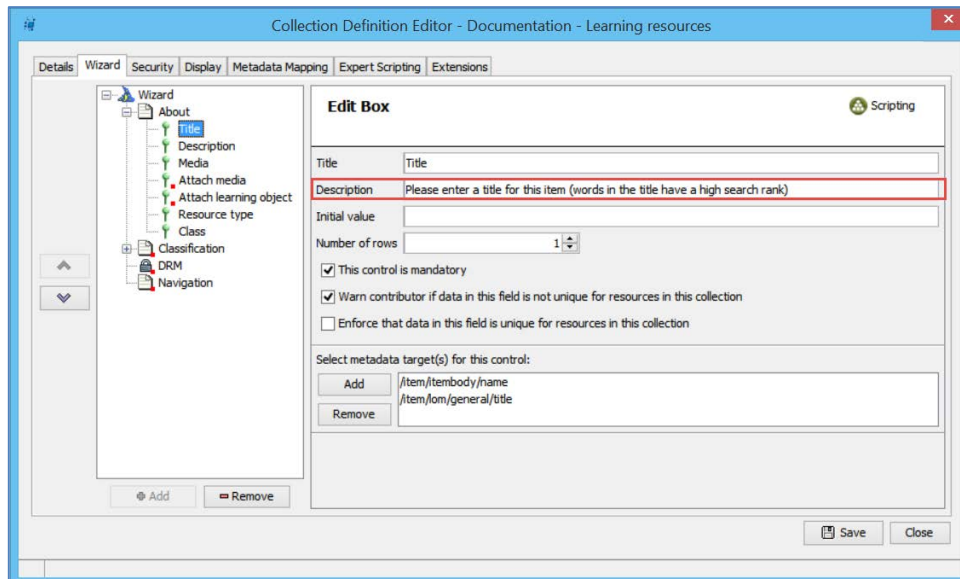


Figure 5 Description field

Enter a brief instruction or explanation in the **Description** field if the function of the control is not fully explained by the title. The description is displayed above the control and below the title.

The contributor's view of a title and description are shown in Figure 6.

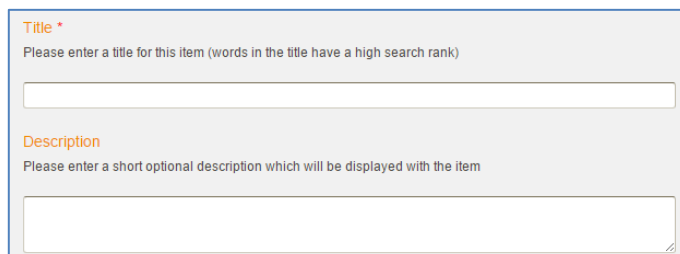



Figure 6 User's view of title and description

Scripting button

Click  Scripting to display the **Script Editor**. Scripting can be used to modify controls based on resource metadata, user roles or resource status. For example, a control could be hidden or displayed based on previous data entered. In the example shown in Figure 7, the visibility of the File Manager control is determined by the value of the `/item/itembody/item_type` metadata node. In this case, this value is set to 'fileman' on the checking of a checkbox.

(NOTE: When a control has a script, a red dot appears beside the control name in the list in the left-hand pane. An example can be seen in Figure 7.)

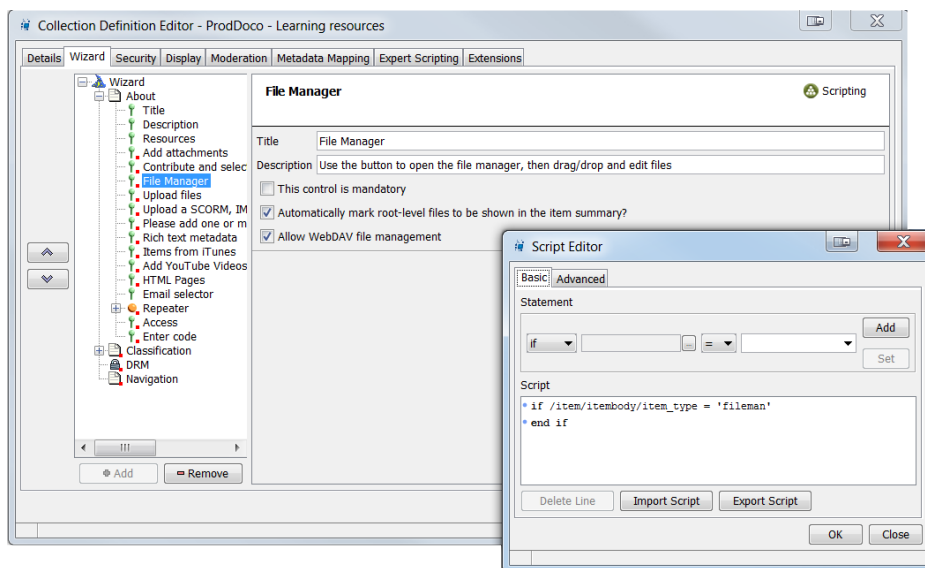


Figure 7 Script Editor

The Script Editor provides two options:

- **Basic**—for simple and quick script creation.
- **Advanced**—for users who are more familiar with EQUELLA and JavaScript™.

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

This control is mandatory

Check the **This control is mandatory** checkbox to enforce that data must be entered in the associated control before the wizard can be completed. A red asterisk displays beside mandatory controls in the contribution wizard. An example is shown in Figure 8.

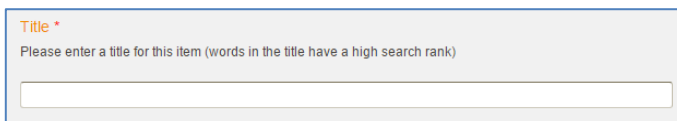


Figure 8 User view of a mandatory control

When a user attempts to submit a resource without entering data into a mandatory field it causes a warning dialog to be displayed and the resource cannot be published.

Select metadata target(s) for this control

Most controls require schema elements to be designated as the storage area for entered data. These schema elements are called **metadata targets**. Multiple metadata targets can be selected for controls. Figure 9 shows an example of two schema elements assigned as metadata targets to a control.

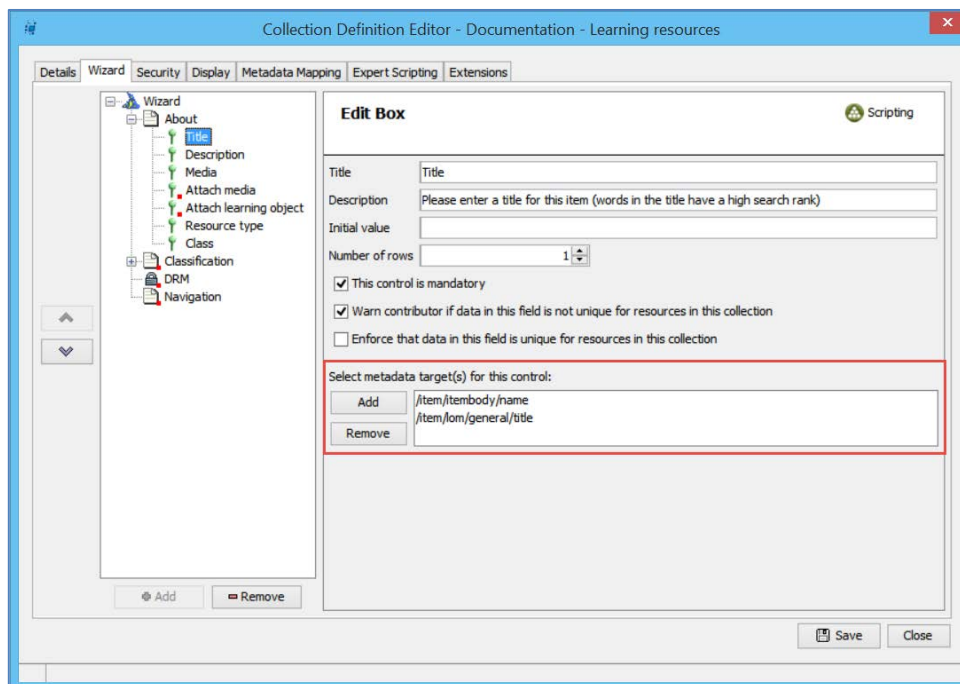


Figure 9 Select metadata target(s) for this control section

The elements of this section are:

- **Add** —click to display a **Choose a schema element?** dialog box. An example is shown in Figure 10.

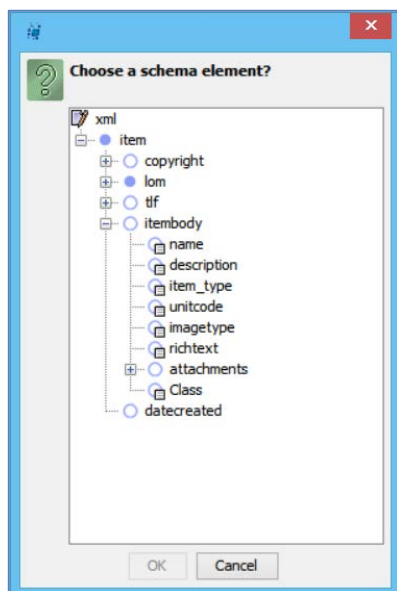


Figure 10 Choose a schema element dialog

- **Remove** —click the button to remove the currently selected metadata target. Select a schema element (e.g. '`xml/item/itembody/name`') then click **OK** to display it as the selected metadata target on the control page.

Wizard control reference

This section describes the controls that can be added to a contribution wizard in the Collections Definitions Editor. Some of the controls can be added to an Advanced search wizard in the Advanced Search Editor and these controls are referenced accordingly.

Advanced Scripting

Customised wizard controls and content can be created using an **Advanced Scripting** control in a contribution wizard. An example is shown in Figure 11.

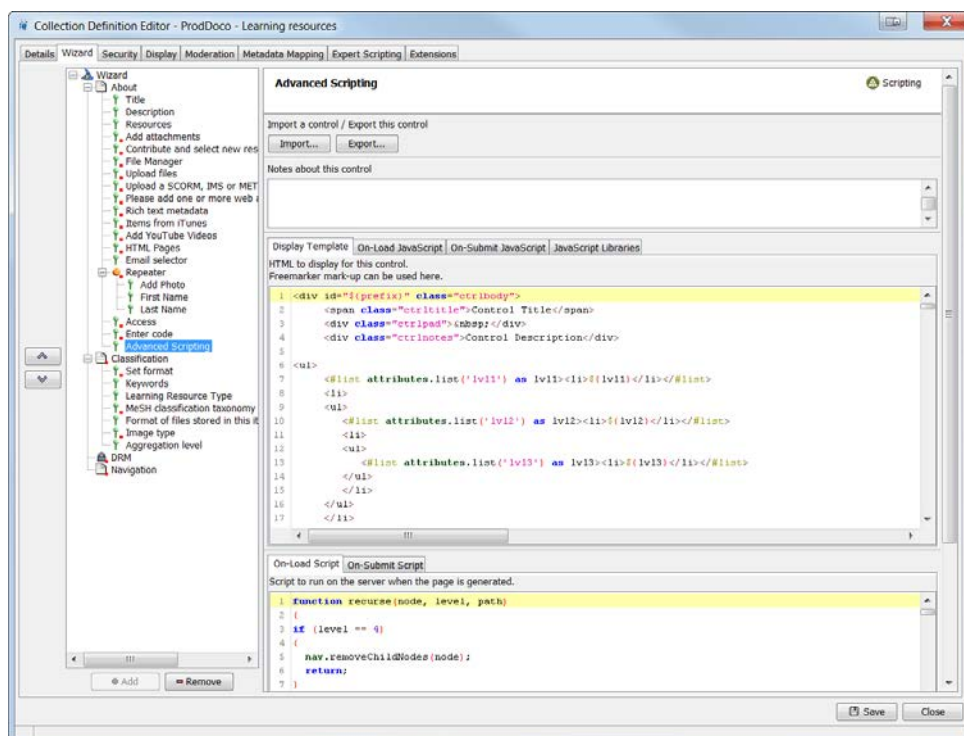


Figure 11 Advance Scripting control page

The Advanced Scripting control:

- uses JavaScript™, FreeMarker and HTML.
- is shareable, with import and export options.

The Advanced Scripting control requires advanced knowledge of scripting languages. Further information is provided in the *EQUELLA Scripting Guide (Advanced)* or alternatively contact Client Support at <http://support.equella.com>.

Attachments

The **Attachments** control enables the configuration of attachments and the various attachment types that can be linked to resources during the contribution process.

An example is shown in Figure 12.

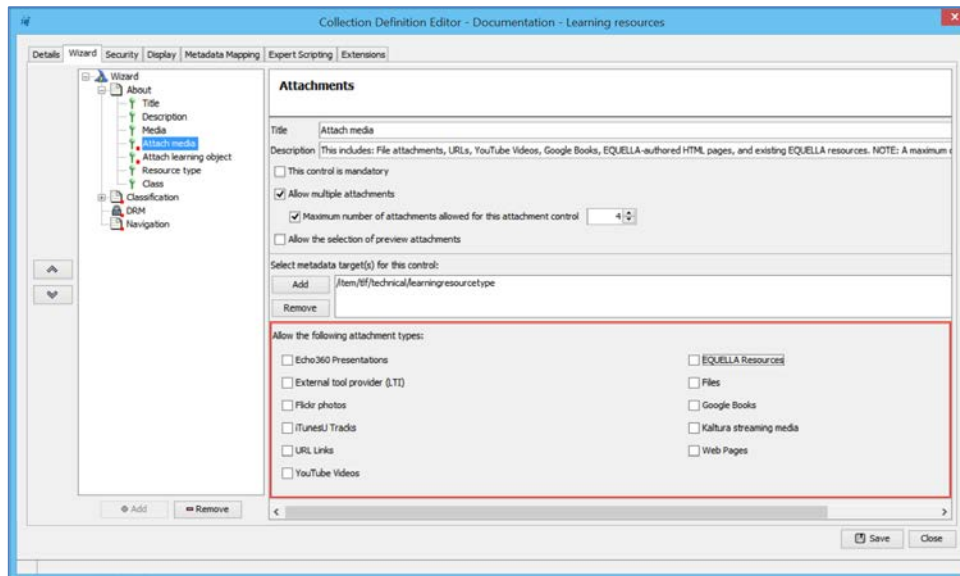


Figure 12 Attachments control—Attachment types

The attachments control has the following elements:

- **Title and Description**—the title and description is displayed on the contribution wizard page, so make sure it is meaningful to the user.
- **This control is mandatory**—select this checkbox to make the attachments control mandatory (i.e. if an attachment hasn't been added, the resource can't be published).
- **Allow multiple attachments**—select to allow more than one attachment to be added to the resource.
 - **Maximum number of attachments allowed for this attachment control** – select this checkbox to select the maximum number of attachments that can be linked or uploaded during contribution for this attachment control This includes all attachment types enabled for the control (e.g. files, URLs, YouTube videos)
- **Select metadata target(s) for the control:**—click **Add** to open the **Choose a schema element?** dialog and select the required metadata node.
- **Allow the following attachment types:**—the following attachment types are available, and can be enabled or disabled using the checkboxes on the Attachments control page:
 - Echo360 Presentations
 - EQUELLA Resources
 - External tool provider (LTI)
 - Files
 - Flickr photos
 - Google Books
 - iTunesU Tracks
 - Kaltura streaming media
 - URL Links

- Web Pages
- YouTube Videos.

The user's view of this control on a contribution wizard remains unchanged irrespective of the enabled attachment types. An example is shown in Figure 13.

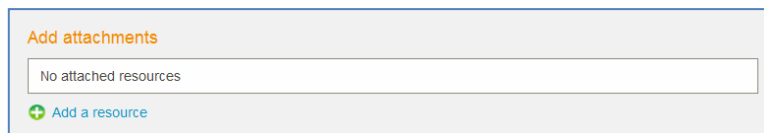


Figure 13 User's view of Attachments control

When the **Add a resource** link is clicked, and there is more than one attachment type enabled, the **Select type** page displays. An example with all attachment types enabled is shown in Figure 14.

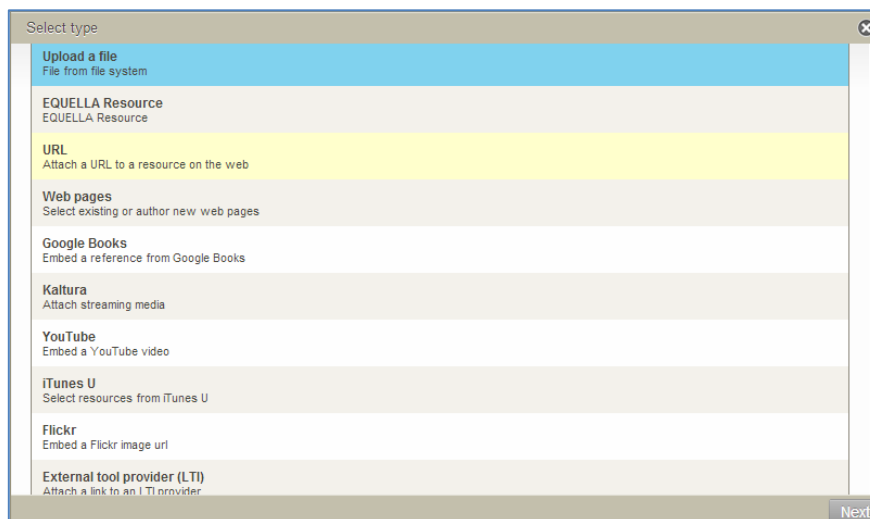
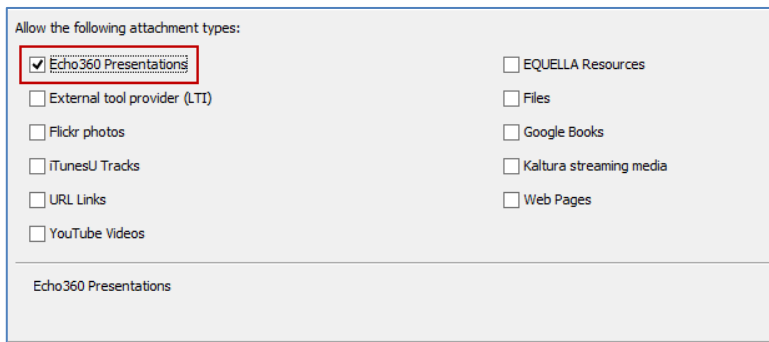


Figure 14 Select type page

If only one attachment type is enabled, the page specific to that type opens immediately. See the *EQUELLA Contribution User Guide* for more information.

Echo360 Presentations

The **Echo360 Presentations** attachment type enables users to link Echo360 presentations to their EQUELLA resources. An example is shown in Figure 15



Allow the following attachment types:

<input checked="" type="checkbox"/> Echo360 Presentations	<input type="checkbox"/> EQUELLA Resources
<input type="checkbox"/> External tool provider (LTI)	<input type="checkbox"/> Files
<input type="checkbox"/> Flickr photos	<input type="checkbox"/> Google Books
<input type="checkbox"/> iTunesU Tracks	<input type="checkbox"/> Kaltura streaming media
<input type="checkbox"/> URL Links	<input type="checkbox"/> Web Pages
<input type="checkbox"/> YouTube Videos	

Echo360 Presentations

Figure 15 Echo360 Presentations attachment type

EQUELLA Resources

The **EQUELLA Resources** attachment type enables users to search for and link to other resources or attachments within the EQUELLA repository or from external sources.



The attachment type can be configured to allow searching within the entire repository and other repositories, or searches can be restricted to particular collections and sources. An example is shown in Figure 16.

Figure 16 EQUELLA Resources attachment type page

The EQUELLA Resources control elements are:

- **Selected resources are**—select from **Not specified** (all resources, regardless of copyright status), **CLA Holdings** (in the UK) or **CAL Holdings** (in Australia).
- **Allow selection of**—select from **Resources or Attachments** to allow both resources and attachments, **Resources only**, or **Attachments only**.

*(NOTE: This option is only available when **Not specified** is selected in the **Selected resources are** drop-down.)*

- **Restrict searching to the following collection:**—check to select the collections that can be searched. Move required collections to the right-hand pane of the shuffle box using the  button. The  button moves all collections at once. To remove

a selected collection, use the button, or to remove all collections, use the button.

- **Restrict advanced search usage to the following:**—check to limit the advanced searches that can be searched. Move required advanced searches to the right-hand pane of the shuffle box using the button. The button moves all advanced searches at once. To remove a selected advanced search, use the button, or to remove all advanced searched, use the button.
- **Restrict searching to the following dynamic collections:**—check to limit the dynamic collections that can be searched. Move required dynamic collections to the right-hand pane of the shuffle box using the button. The button moves all dynamic collections at once. To remove a selected dynamic collection, use the button, or to remove all dynamic collections, use the button.
- **Restrict contribution to the collections**—check to limit the collections available for contribution. This refers to the functionality provided by the **Contribute** button on the *Select* page during contribution. Select collections that can be contributed to by using the button. The button moves all collections at once. To remove a selected collection, use the button, or to remove all collections, use the button. (NOTE: For the Quick Contribute feature to be enabled on the *Select* page the collection must be selected in this option and in the *Settings* page *Selection sessions* function.)

If a search or contribution option has been restricted (checked) but no collections, searches or sources have been selected and moved to the right-hand pane, that option will not be available from the *Select* or *Search* page. For example, if the **Restrict contribution to the collections:** checkbox has been selected, but no collections have been moved to the right hand pane, the **Contribute** portlet does not display on the *Select* page.

See the *EQUELLA Contribution User Guide* for more information about adding EQUELLA resources or attachment during contribution.

External tool provider (LTI)

Selecting the **External tool provider (LTI)** attachment type enables users to select LTI tools from external providers to be added as links to a resource during contribution. An example is shown in Figure 17.

Allow the following attachment types:

<input type="checkbox"/> Echo360 Presentations	<input type="checkbox"/> EQUELLA Resources
<input checked="" type="checkbox"/> External tool provider (LTI)	<input type="checkbox"/> Files
<input type="checkbox"/> Flickr photos	<input type="checkbox"/> Google Books
<input type="checkbox"/> iTunesU Tracks	<input type="checkbox"/> Kaltura streaming media
<input type="checkbox"/> URL Links	<input type="checkbox"/> Web Pages
<input type="checkbox"/> YouTube Videos	

External tool provider (LTI)

Figure 17 External tool provider (LTI) attachment type

See the *EQUELLA Contribution User Guide* for more information about adding LTI tools during contribution.

Files

Selecting the **Files** attachment type enables users to upload one or more files or archives to attach to a resource during contribution. An example is shown in Figure 18.

The screenshot shows the 'Allow the following attachment types:' section with a list of options. The 'Files' option is selected and highlighted with a red box. Below this, the 'Files' configuration section is visible, containing several sub-sections: 'General' with checkboxes for 'Restrict individual upload file size' (unchecked) and 'Do not allow unzipping of files' (unchecked), a 'Max. file size (in MB)' input field set to 10, and a 'Packages' section with a checkbox for 'Only allow upload of content packages' (unchecked) and a list of package types (QTI, SCORM) with checkboxes. The 'Thumbnails' section has a checkbox for 'Do not generate thumbnails by default' (unchecked) and a checked checkbox for 'Allow contributors to turn thumbnail generation on or off'. The 'MIME type restrictions' section has a checkbox for 'Restrict to the following MIME types:' (unchecked) and a list of MIME types in a scrollable area.

Figure 18 Attachments control with Files enabled

The **Files** attachment type configuration options are:

- **General:**
 - **Restrict individual upload file size** – select this checkbox to enter a maximum size (in megabytes) for files uploaded during contribution to this attachment control. Digits can be typed and decimal points used. Numbers can also be increased or decreased by using the arrows. During contribution, if a file larger than the set maximum is attempted to be uploaded, a message will alert the contributor and will prevent the file from uploading.
 - **Do not allow unzipping of files** – select this checkbox to disable the option to extract archive files on upload to select files contained within the archive.
- **Thumbnails:**
 - **Do not generate thumbnails by default** – select this checkbox to prevent any thumbnails from being generated for files uploaded using this attachment control.
 - **Allow contributors to turn thumbnail generation on or off** – select this checkbox to allow users to prevent thumbnail generation for each file they upload during contribution by selecting a 'No thumbnail' checkbox.

- **Only allow upload of content packages (one content package permitted per item)** – select this checkbox to restrict the upload of files to only content packages. Additionally, one or both of the following restrictions can be applied:
 - **QTI packages** – select this checkbox to allow only packages recognised by the system as IMS QTI 2.1 standard packages to be uploaded.
 - **SCORM packages** – select this checkbox to allow only packages recognised by the system as SCORM packages to be uploaded.
- **MIME type restrictions** – allows users to restrict files being uploaded during contribution to selected MIME types.
 Select **Restrict to the following MIME types** then highlight the allowed MIME types and use the
 During contribution, if a file with a MIME type other than one selected and moved to the right hand panel is attempted to be uploaded, a message will alert the contributor and will prevent the file from uploading.

See the *EQUELLA Contribution User Guide* for more information about adding files during contribution.

Flickr photos

Selecting the **Flickr photos** attachment type enables users to add Flickr photo links to a resource during contribution. The **Flickr photos** section allows the user to configure API key information, if required. An example is shown in Figure 19.

The screenshot shows a web form titled 'Allow the following attachment types:'. It contains two columns of checkboxes. In the left column, 'Flickr photos' is checked and highlighted with a red rectangle. Other options include 'EQUELLA Resources', 'iTunesU Tracks', 'Web Pages', 'Files', 'Google Books', 'URL Links', and 'YouTube Videos'. Below this section, there is a heading 'Flickr photos' followed by a paragraph: 'Supplying an API key and API shared secret is optional. If you do not supply one the inbuilt EQUELLA key will be used. You can apply for your own Flickr API key [here](#)'. At the bottom, there are two input fields: 'Flickr API key' and 'Flickr API shared secret'.

Figure 19 Attachment control with Flickr photos enabled

The Flickr configuration elements are:

- **Flickr API key**—enter your Flickr API key here. If you don't have one, the inbuilt EQUELLA key is used; therefore leave these fields blank. If you require your own key but don't currently have one, click the **here** link to open the **Flickr The App Garden** and apply.
- **Flickr API shared secret**—enter the shared secret that matched the key.

Google Books

Selecting the **Google Books** attachment type enables users to search for Google Books™ content to be added as links to a resource during contribution. An example is shown in Figure 20.

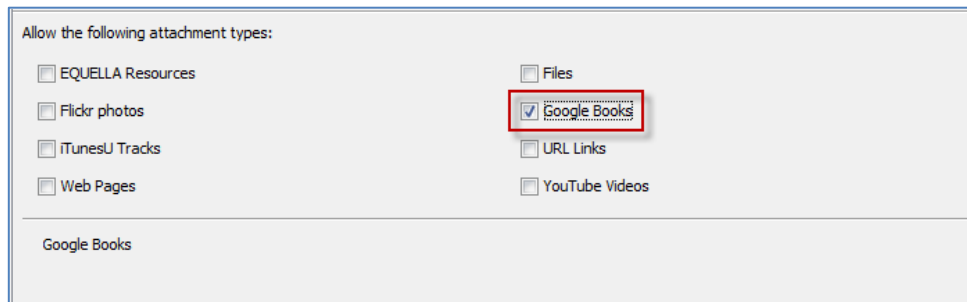
A screenshot of a web interface titled "Allow the following attachment types:". It contains two columns of checkboxes. The left column includes "EQUELLA Resources", "Flickr photos", "iTunesU Tracks", and "Web Pages". The right column includes "Files", "Google Books", "URL Links", and "YouTube Videos". The "Google Books" checkbox is checked and highlighted with a red rectangular box. Below the checkboxes, there is a section labeled "Google Books" which is currently empty.

Figure 20 Attachment control with Google Books enabled

See the *EQUELLA Contribution User Guide* for more information about adding Google Books links during contribution.

iTunes U Tracks

Selecting the **iTunes U Tracks** attachment type enables users to add iTunes U™ tracks to a resource during contribution. The **iTunes U Tracks** section allows the user to configure channel definitions, if required. An example is shown in Figure 21.

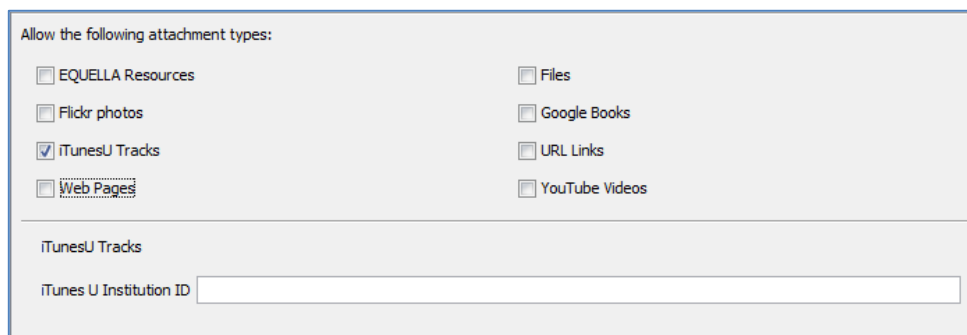
A screenshot of a web interface titled "Allow the following attachment types:". It contains two columns of checkboxes. The left column includes "EQUELLA Resources", "Flickr photos", "iTunesU Tracks", and "Web Pages". The right column includes "Files", "Google Books", "URL Links", and "YouTube Videos". The "iTunesU Tracks" checkbox is checked. Below the checkboxes, there is a section labeled "iTunesU Tracks" which contains a text input field labeled "iTunes U Institution ID".

Figure 21 Attachments control with iTunes U Tracks enabled

The iTunes U Tracks configuration element is:

- **iTunes U Institution ID**—enter the site address without the http prefix and slashes (e.g. <https://deimos.apple.com/WebObjects/Core.woa/API/ShowTree/utm.edu> becomes deimos.apple.com/WebObjects/Core.woa/API/ShowTree/utm.edu). A list of public iTunes U sites can be found at <http://itunesu.pbwiki.com/>.

See the *EQUELLA Contribution User Guide* for more information about adding iTunes U tracks during contribution.

Kaltura streaming media

Selecting the **Kaltura streaming media** attachment type enables users to search for Kaltura streaming media items to be added as links to a resource during contribution. Additionally, new media can be uploaded to the Kaltura server during contribution.

An example is shown in Figure 22.

The screenshot shows a configuration window titled 'Allow the following attachment types:'. It contains two columns of checkboxes. In the left column, 'EQUELLA Resources', 'Flickr photos', 'iTunesU Tracks', 'URL Links', and 'YouTube Videos' are listed. In the right column, 'Files', 'Google Books', 'Kaltura streaming media' (which is checked and highlighted with a red box), and 'Web Pages' are listed. Below this, there is a section for 'Kaltura streaming media' configuration. It includes a 'Kaltura server' dropdown menu set to 'Kaltura.com SaaS'. Under 'Restrictions', there are three radio button options: 'None - Users may choose to upload new media or select existing media' (which is selected), 'Allow uploading of new media only', and 'Allow the selection of existing media only'.

Figure 22 Attachment control with Kaltura streaming media enabled

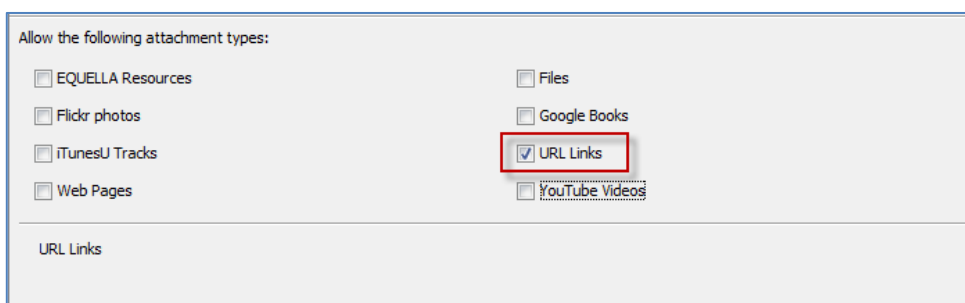
The Kaltura streaming media configuration elements are:

- **Kaltura server** - Multiple Kaltura servers, both local and SaaS, can be configured, and each attachment control can have a relevant server selected from the drop-down list. The Kaltura server settings are configured through the **Kaltura** function accessed from the **Settings** page. See the *EQUELLA Administration Overview Guide* for more information.
- **Restrictions** – Kaltura functionality can be restricted using one of the following options:
 - **None – Users may choose to upload new media or select existing media** – selecting this option allows users to search the Kaltura server and select existing media to link to a resource or upload new media during contribution.
 - **Allow uploading of new media only** – selecting this option restricts users to only uploading new media during contribution.
 - **Allow the selection of existing media only** – selecting this option restricts users to searching the Kaltura server and selecting existing media during contribution.

See the *EQUELLA Contribution User Guide* for more information about adding Kaltura streaming media items during contribution.

URL Links

Selecting the **URL Links** attachment type enables users to enter one or more URL links to a resource during contribution. An example is shown in Figure 23.



Allow the following attachment types:

<input type="checkbox"/> EQUELLA Resources	<input type="checkbox"/> Files
<input type="checkbox"/> Flickr photos	<input type="checkbox"/> Google Books
<input type="checkbox"/> iTunesU Tracks	<input checked="" type="checkbox"/> URL Links
<input type="checkbox"/> Web Pages	<input type="checkbox"/> YouTube Videos

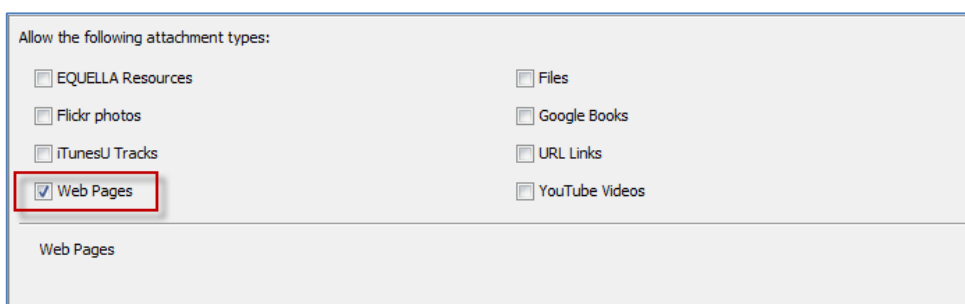
URL Links

Figure 23 Attachments control with URL Links enabled

See the *EQUELLA Contribution User Guide* for more information about adding URL links during contribution.

Web Pages

The **Web pages** attachment type enables users to author, edit or import web pages. An example is shown in Figure 24.



Allow the following attachment types:

<input type="checkbox"/> EQUELLA Resources	<input type="checkbox"/> Files
<input type="checkbox"/> Flickr photos	<input type="checkbox"/> Google Books
<input type="checkbox"/> iTunesU Tracks	<input type="checkbox"/> URL Links
<input checked="" type="checkbox"/> Web Pages	<input type="checkbox"/> YouTube Videos

Web Pages

Figure 24 Attachments control with Web Pages enabled

See the *EQUELLA Contribution User Guide* for more information about adding web pages during contribution.

YouTube Videos

Selecting the **YouTube** attachment type enables users to add YouTube™ video links to a resource during contribution. The **YouTube Videos** section allows the user to configure channel definitions, if required. An example is shown in Figure 25.

The screenshot shows a web form titled 'Allow the following attachment types:'. It contains two columns of checkboxes. In the left column, 'YouTube Videos' is checked and highlighted with a red box. Other options include Echo360 Presentations, External tool provider (LTI), Flickr photos, iTunesU Tracks, URL Links, EQUELLA Resources, Files, Google Books, Kaltura streaming media, and Web Pages. Below this is a section titled 'YouTube Videos' with a checkbox 'Enable YouTube channels'. Under this checkbox, there are two radio buttons: 'Allow searching within channels defined below' (selected) and 'Restrict searching to within channels defined below'. Below the radio buttons, there is a section 'Enable YouTube channels' with input fields for 'Channel Name' and 'Channel ID', and an 'Add' button. Below these are 'Remove', 'Up', and 'Down' buttons. A table with two columns, 'Name' and 'Value', is shown below the buttons. At the bottom, there is a note: 'The Channel ID can be found by browsing to your favourite channel on YouTube and copying the last section of the URL (e.g. UCNRQ-DWUXf4UVN9L31Y9f3Q). Do not attempt to enter any complete URLs (for example you would NOT enter https://www.youtube.com/channel/UCNRQ-DWUXf4UVN9L31Y9f3Q)'.

Figure 25 Attachments control with YouTube Videos enabled

Check the **Enable YouTube channels** checkbox to configure YouTube channel information. The YouTube videos configuration elements are:

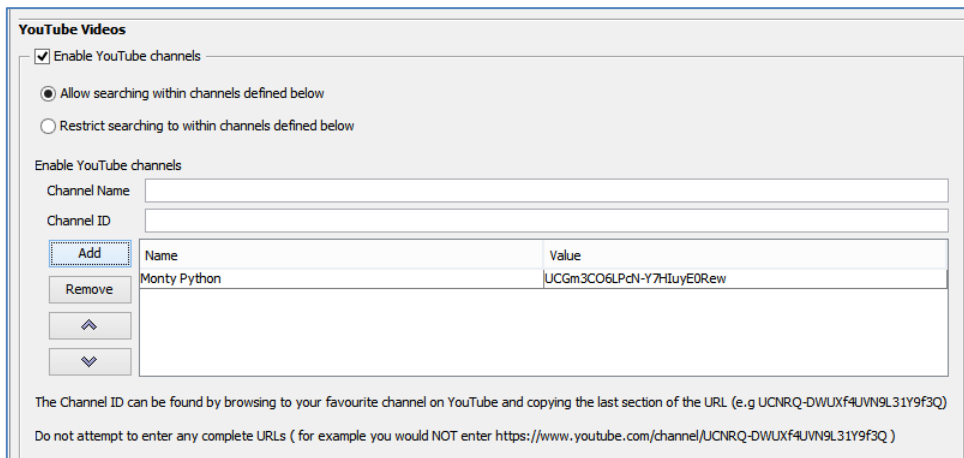
- **Allow searching within channels defined below:**—select this option to define specific channels relevant to a collection. These channels appear in a **Within** drop-down list as well as an All Youtube option when adding a YouTube video during contribution, making searching easier.
- **Restrict searching to within channels defined below**—select this option to define specific channels relevant to a collection. These channels appear in a **Within** drop-down list, but with no All Youtube option. The user must choose one of the configured channels to search in.
- Enable YouTube channels
 - **Channel Name**—enter the name of the channel
 - **Channel ID**—enter the channel identifier, which is the last part of the channel URL. For example, `https://www.youtube.com/channel/UCGm3CO6LPcN-Y7HIuyE0Rew` would become **UCGm3CO6LPcN-Y7HIuyE0Rew**.

To add a YouTube channel

1. Enter a name to display in the drop-down list during contribution in the **Channel Name** field (e.g. *Monty Python*).
2. Enter the YouTube **Channel ID** (e.g. *UCGm3CO6LPcN-Y7HIuyE0Rew*).

3. Click .

An example is shown in Figure 26.



YouTube Videos

☒ Enable YouTube channels





☒ Allow searching within channels defined below

☐ Restrict searching to within channels defined below

Enable YouTube channels

Channel Name

Channel ID



   

Name	Value
Monty Python	UCGm3CO6LPdN-Y7HIuyE0Rew

The Channel ID can be found by browsing to your favourite channel on YouTube and copying the last section of the URL (e.g UCNRQ-DWUXf4UVN9L31Y9f3Q)

Do not attempt to enter any complete URLs (for example you would NOT enter <https://www.youtube.com/channel/UCNRQ-DWUXf4UVN9L31Y9f3Q>)

Figure 26 Add YouTube channel

Use the  and  buttons to change the order of the list. This will change the order they appear in the drop-down list during contribution.


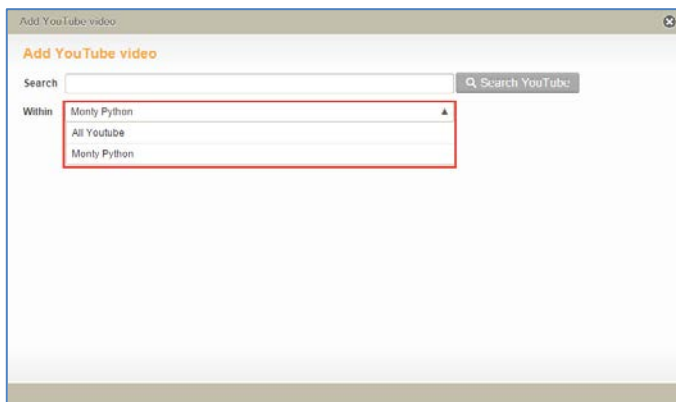


To remove a channel, highlight the required channel and click .

Figure 27 shows an example of the drop-down list when linking a YouTube video to a resource during contribution.



Add YouTube video

Search  Search YouTube

Within 

Monty Python

All Youtube

Monty Python

Figure 27 Add YouTube page at contribution

See the *EQUELLA Contribution User Guide* for more information about adding YouTube videos during contribution.

Button

The **Button** control enables the user to create a button with a function determined by an associated script. An example is shown in Figure 28.

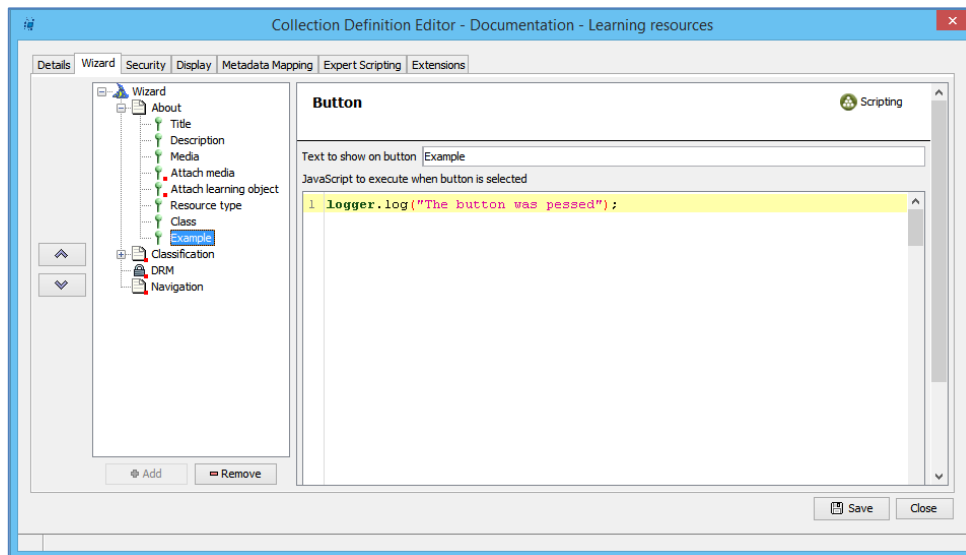


Figure 28 Button control page

The Button control elements are:

- **Text to show on button**—enter text (e.g. *Example*) to be displayed on the button.
- **JavaScript to be executed when button is selected**—enter JavaScript to enable the function on the button.

Figure 29 shows the user's view of the **Button** control. In this example, clicking the button reloads the contribution wizard page and writes "*The button was pressed*" to the resource-centre logs.

EQUELLA
PEARSON

Learning resources

Contribute > Learning resources

About

Title *
Please enter a title for this item (words in the title have a high search rank)

Description
Please enter a short optional description which will be displayed with the item

Media
Please select the media to attach to your item

☐ Media (Files, URLs, YouTube, Flickr, Resources)
 ☐ Rich text metadata

☐ Learning Objects (IMS & SCORM)
 ☐ Navigation

☐ Digital Rights Management (DRM)
 ☐ Classification metadata

Example

Resource type
Please select the type of resource

☐ General knowledge
 ☐ Exam Preparation

☐ Required Reading
 ☐ Assignment Related

Class
Select the classes for which this resource will be relevant

Save Save and continue Cancel

About Preview Select thumbnail

Figure 29 User's view of Button control

Calendar

The **Calendar** control allows the selection of a date or date range. For example, a publication creation or modification date, or to control resource use or availability. An example is shown in Figure 30.

Collection Definition Editor - Navigate2013 - Learning resources

Details Wizard Security Display Metadata Mapping Expert Scripting Extensions

Calendar

Title Date

Description Select required date

☐ Default Date

☒ Today (Contribution date)

Date format

☒ Day, month and year
 ☐ Month and year
 ☐ Year

☐ This control is mandatory
 ☐ Automatically reload controls after this one on selection
 ☐ This control should select a time range

Select metadata target(s) for this control:

Save Close

Figure 30 Calendar control page

The Calendar control elements are:

- **Default Date**—select to choose a default date to display to the user in the calendar control. The default date can be selected:

- by selecting a fixed date. Select the radio button then select to open a calendar control to select a specific default date. An example is shown in Figure 31.

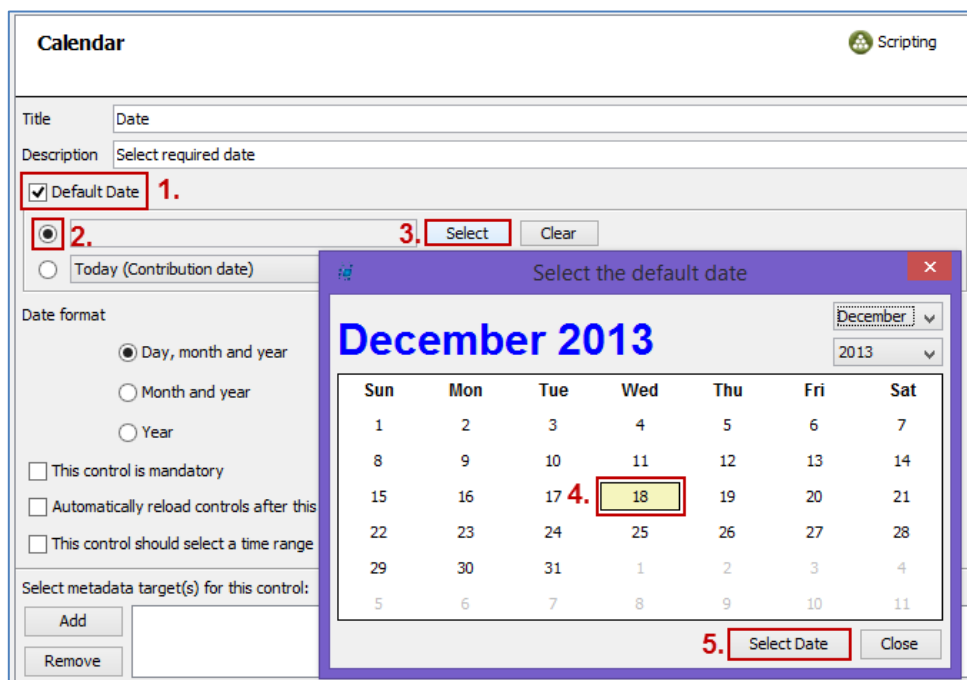


Figure 31 Select specific default date for calendar control

- selecting an option relative to the contribution date from the drop-down list. An example is shown in Figure 32.

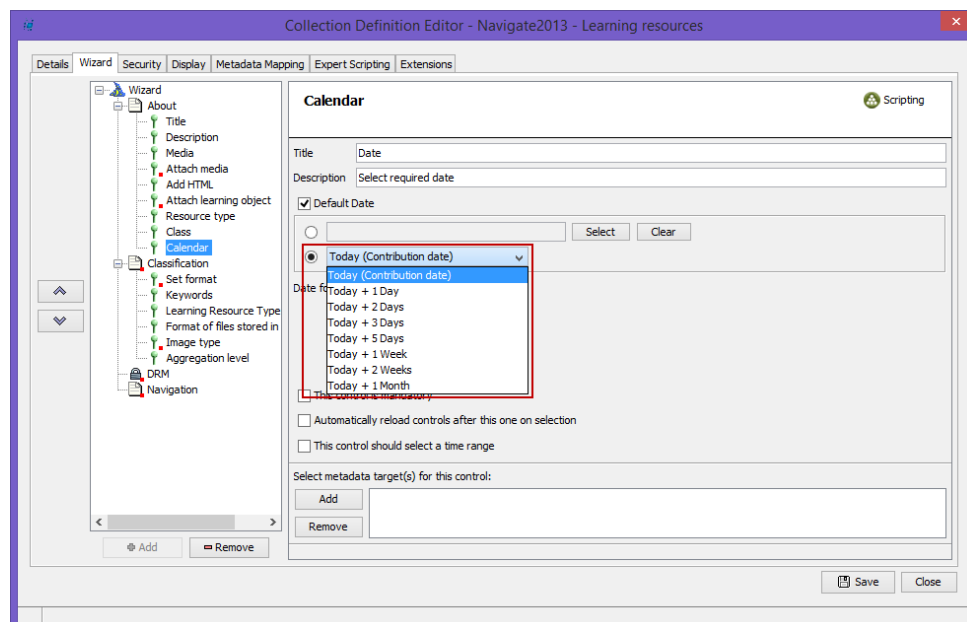


Figure 32 Select default date relative to contribution date

- Date format** – select the required format from:
 - Day, month and year** – requires a day, month and year to be selected.
 - Month and year** – requires the month and year to be selected.

- **Year** – requires only the year to be selected.
- **Automatically reload controls after this one on selection**—select to cause the wizard page to refresh once the user has selected a date. This option is checked in the situation where the selection of a calendar value causes an associated script to run, and may result in other controls being displayed.
- **This control should select a time range**—select to enable a date range with a **From** calendar control and a **To** calendar control. When selected in the contribution wizard, the control opens a calendar display that allows users to select the relevant dates. An example is shown in Figure 33.

Figure 33 User's view of a Calendar control with date range enabled

The Calendar control is also available in the Advanced Search Editor.

See the *EQUELLA Contribution User Guide* for more information about using calendar controls during contribution.

Check Box Group

The **Check Box Group** control creates a checkbox group from which one or more elements can be selected. An example is shown in Figure 34.






Add	Name	Value	Selected
Remove	Media (Files, URLs, YouTube, Flickr, Resources)	media	<input type="checkbox"/>
	Rich text metadata	html	<input type="checkbox"/>
	Learning Objects (IMS & SCORM)	learningobjects	<input type="checkbox"/>
	Navigation	navtree	<input type="checkbox"/>
	Digital Rights Management (DRM)	drm	<input type="checkbox"/>
	Classification metadata	classification	<input type="checkbox"/>

Figure 34 Check Box Group control page

The Check Box Group control elements are:

- **Number of columns**—select how many columns will be displayed on the wizard page. The default setting is 1.
- **Automatically reload page on selection**—check when the control has an associated script and different controls or options need to be shown after the user's selection.

Add checkboxes to the Check Box Group pane

- **Check Box Name**—enter a name to be displayed next to the checkbox.
- **Check Box Value**—enter a value to make it easily identifiable for an associated script (usually the same as the name). This is the value that will be stored in the metadata target.
- —click to add checkbox names and values to the list.
- —click to remove the selected checkbox from the list.
- —click to move the selected checkbox above its neighbouring element.
- —click to move the selected checkbox below its neighbouring element.
- —click the button to rearrange the checkbox group into alphabetical order.
- **Selected**—check this option to have the checkbox selected as default. Uncheck the box to deselect the option.

An example of the user's view of a checkbox is shown in Figure 35.

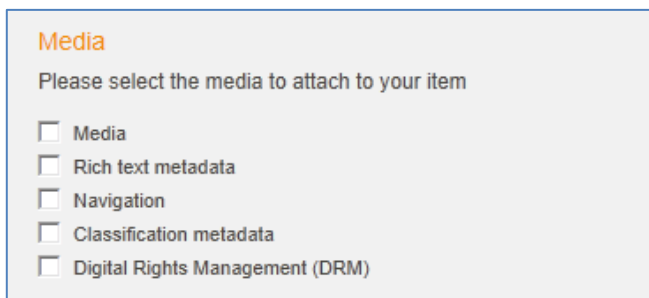


Figure 35 User's view of a Check Box Group

The Check Box Group control is also available in the Advanced Search Editor.

DRM

The **DRM** (Digital Rights Management) control is used to manage digital rights for resources uploaded to the repository. An example is shown in Figure 36.

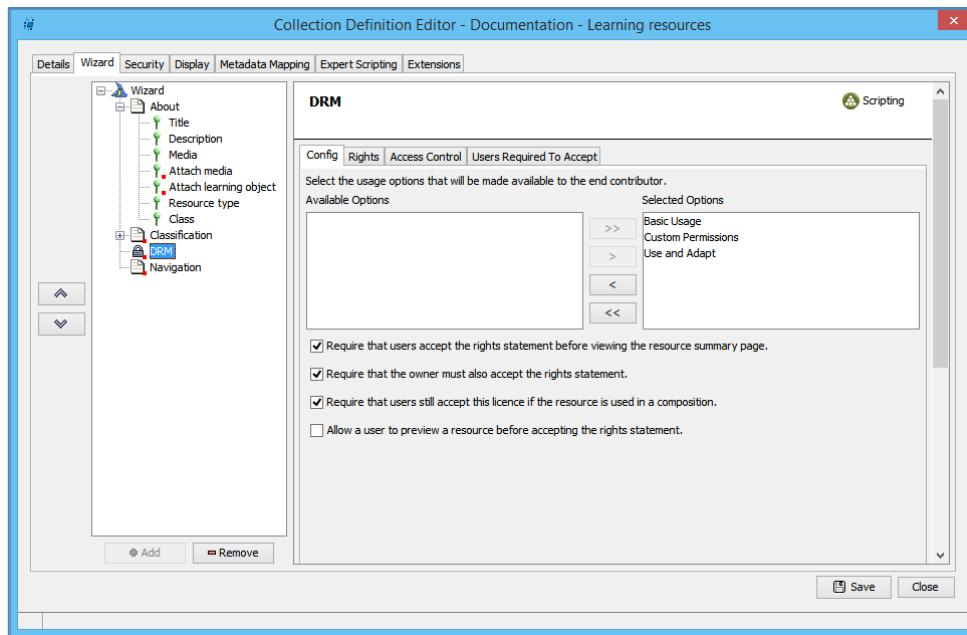


Figure 36 DRM configuration page

The DRM control can only be added as a new root element in the hierarchy.

Adding a DRM control displays one or two pages in a contribution wizard. These pages gather information on the digital rights associated with the contributed resources. Figure 37 shows an example **DRM—Ownership and rights** page, and Figure 38 a **DRM—Access Control** page in a Contribution Wizard.

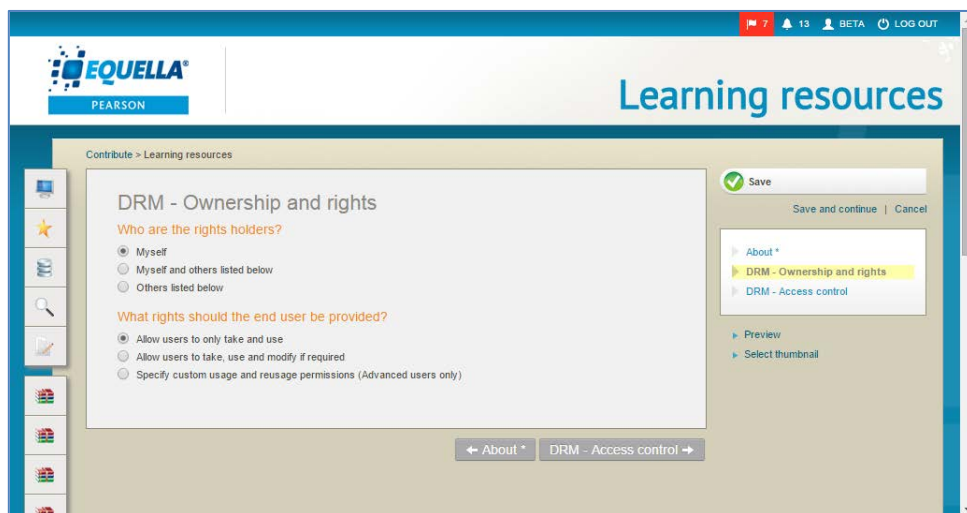


Figure 37 User's view of DRM—Details page

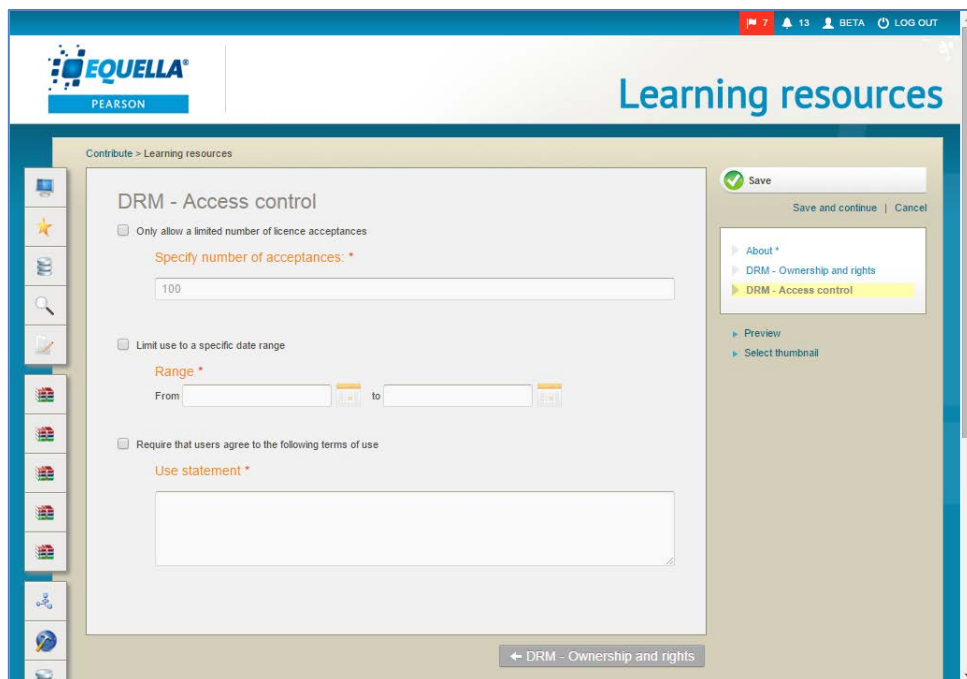


Figure 38 User's view of DRM—Access Control page

See the *EQUELLA Digital Rights Management Guide* for full information on setting up digital rights management.

Edit Box

The **Edit Box** control allows entry of basic text such as names, descriptions, tags, keywords, comments or other details. An example is shown in Figure 39.

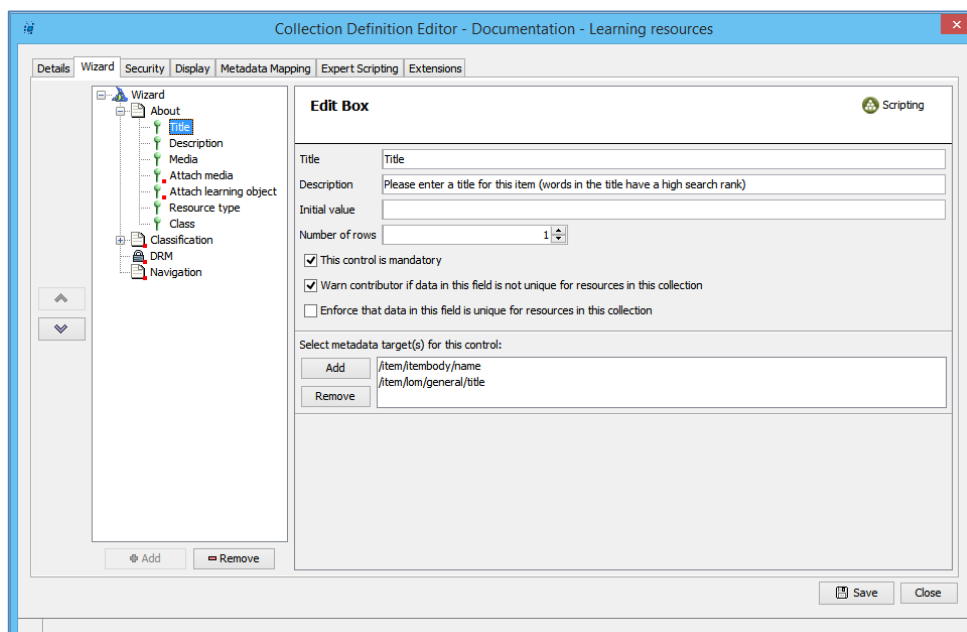


Figure 39 Edit Box control page

The Edit Box control elements are:

- **Initial value**—enter a default value that is automatically applied to the control, but that can be altered at the time of contribution or during editing. This can be used for storing potentially repetitive information pertaining to a given collection, such as course names or codes.
- **Number of rows**—select the number of rows displayed in the box. When more than one row is selected a scroll bar is added. The default setting is 1. Figure 40 shows a *Title* field with one row and a *Description* field with three rows.

Figure 40 User's view of edit boxes

- **Warn contributor if data in this field is not unique for items in this collection**—if data is not unique, users will be asked to accept the duplication during contribution before the resource can be submitted. For the checking to perform correctly, ensure each metadata target in the chosen schema is marked as 'Indexed for Advanced Searching'.
- **Enforce that data in this field is unique for items in this collection**—this option is only enabled if the preceding option is selected. When this box is selected, data entered must be unique. Users will be alerted to any duplication, and if the data is not altered to be unique the resource can only be submitted as a draft.

The Edit Box control is also available in the Advanced Search Editor.

Email Selector

The **Email Selector** control allows for the selection of the email addresses associated with registered EQUELLA users. An example is shown in Figure 41.

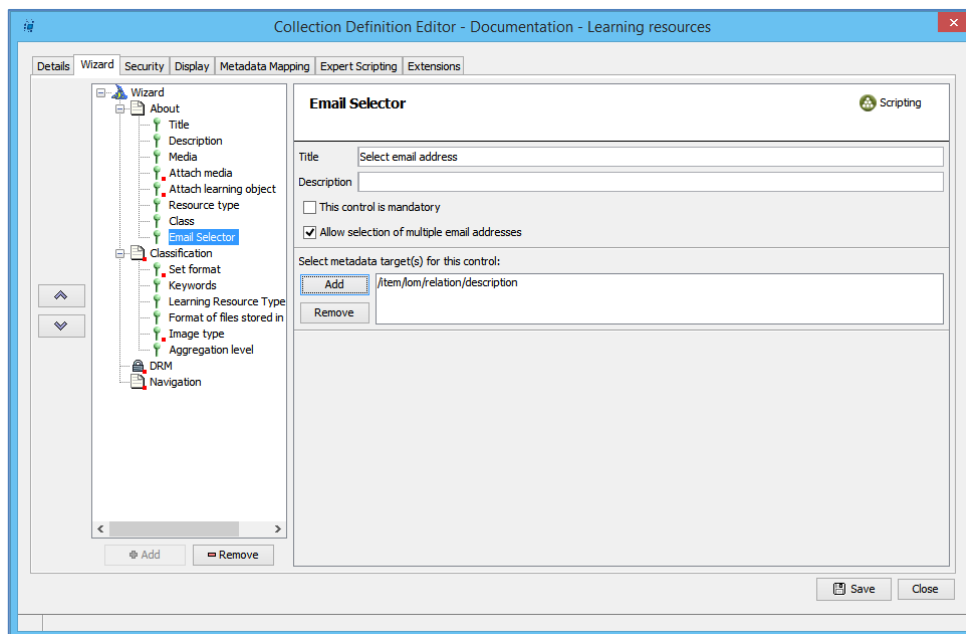


Figure 41 Email Selector control page

The Email Selector control elements include:

- **Allow selection of multiple email addresses**—by default this control allows the selection of a single email address. Selecting this option allows multiple email address to be added.

Figure 42 shows an example of the email selector in a contribution wizard.

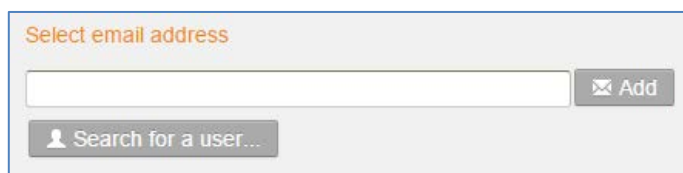


Figure 42 User's view of Email Selector control

See the *EQUELLA Contribution User Guide* for more information about using the email selector control during contribution.

File Manager

The **File Manager** control is a Java™ applet that allows for advanced management of resources being contributed. Users can:

- drag-and-drop files and folders from a local computer or network;
- create, delete or rename folders;
- directly edit files using native tools such as Word™;
- easily download files to the local computer or network; and
- mark which files are to be shown (or not) in the resource summary.

An example of the File Manager control page is shown in Figure 43.

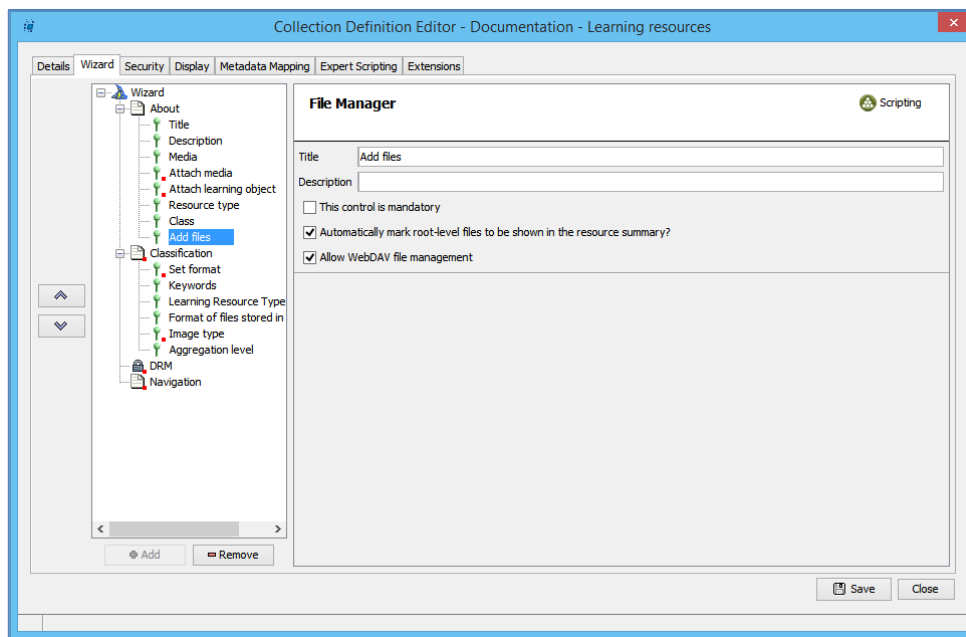



Figure 43 File Manager control page

The File Manager control elements are:

- **Automatically mark root-level files to be shown in the resource summary?**—select to display root-level files (files not in folders) automatically on the resource summary. If this is not checked, the **Show in Item summary** button  in the File Manager must be selected for each required attachment to display on the resource summary page. See the *EQUELLA Contribution User Guide* for more information.
- **Allow WebDAV file management**—select to allow WebDAV functionality in EQUELLA. WebDAV functionality enables the user to add resources to a web-accessible folder to make them available to users for the purposes of facilitating collaboration on documents, similar to the way a FTP or cloud server would operate. See the *EQUELLA Contribution User Guide* for more information.

An example of the File Manager with WebDAV enabled displayed in a contribution wizard is shown in Figure 44.

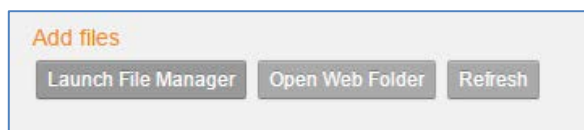


Figure 44 User's view of the file manager

Group

The **Group** control is used to create a group of controls that exist under a group heading in a contribution wizard. It is primarily for display purposes; to create a clear relationship between associated controls. This control cannot be used in isolation, it must be configured with child controls. To add specific controls to the group, a **Group item** must first be added as a child of the **Group**. See [Group Item](#) on page 35. Figure 45 shows an example Group control.

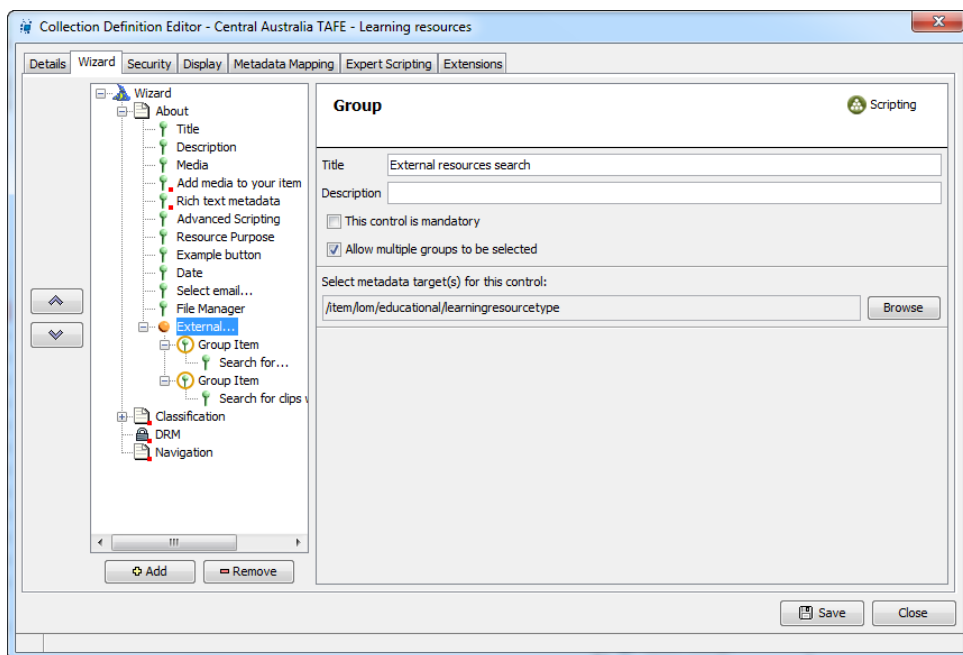


Figure 45 Group control page

The **Group** control elements are:

- **Allow multiple groups to be selected**—check to enable the selection of more than one group item. When this property is checked a checkbox is displayed with each item in the group (an example is shown in Figure 50) and when un-checked a radio button is displayed. An example is shown in Figure 46.

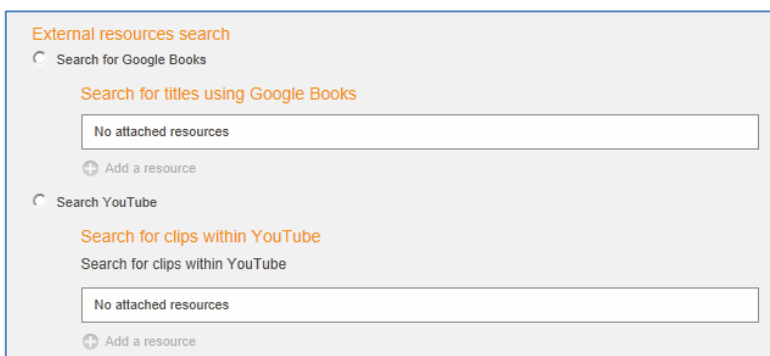


Figure 46 Group control without multiple item selection option selected.

Group Item

The **Group Item** control cannot be used in isolation, but must be added as a child of the **Group** control. Figure 47 shows an example Group Item control.

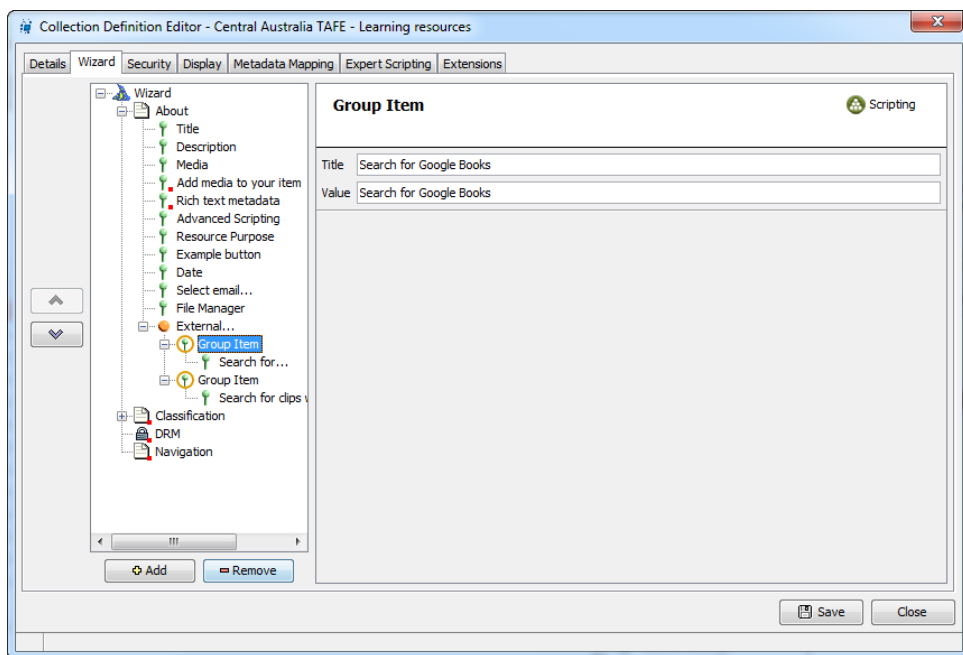


Figure 47 Group Item control

The elements of the **Group Item** control are:

- **Title**—enter a name to be displayed with the associated control (e.g. *Search for Google Books*)
 - **Value**—enter a value to make the control easily identifiable for an associated script.
- Click **Add** to open the **Select a control...** dialog. Select the appropriate control (e.g. *Attachments*) and click **OK**. The selected control is added as a child of the Group Item control. An example is shown in Figure 48.

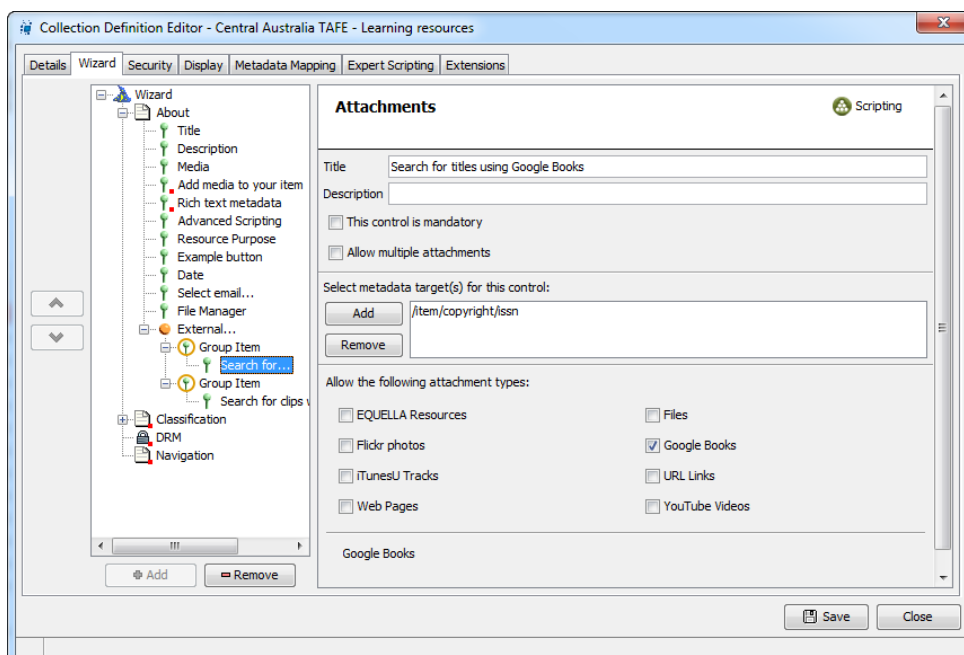


Figure 48 Control added to Group Item

Further controls can be added to the Group Item control, and further Group Item controls with child controls can be added to the Group control. An example of the Wizard hierarchy view of a Group control with two Group Items added is shown in Figure 49.

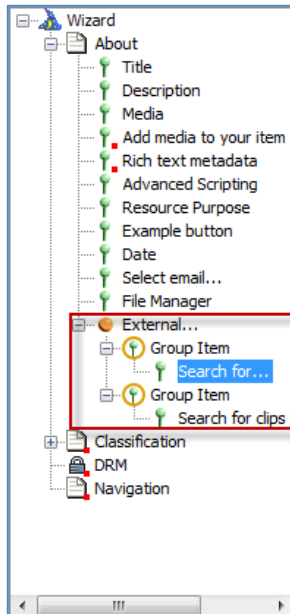


Figure 49 Wizard hierarchy view of Group control

The user's view of the same Group control is shown in Figure 50.

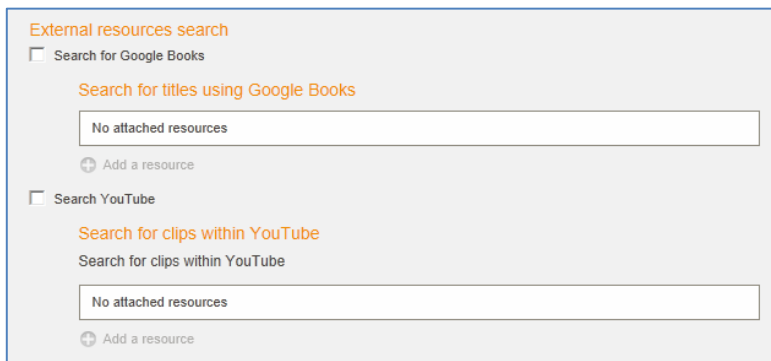


Figure 50 User's view of Group and Group Item controls

Group selector

The **Group Selector** control enables the selection of groups during contribution and stores the details with the resource metadata. For example, the group selector could be used with a *Dynamic metadata ACL* to select groups whose users have access to a collection or even specific item. Figure 51 shows an example Group Selector control page.

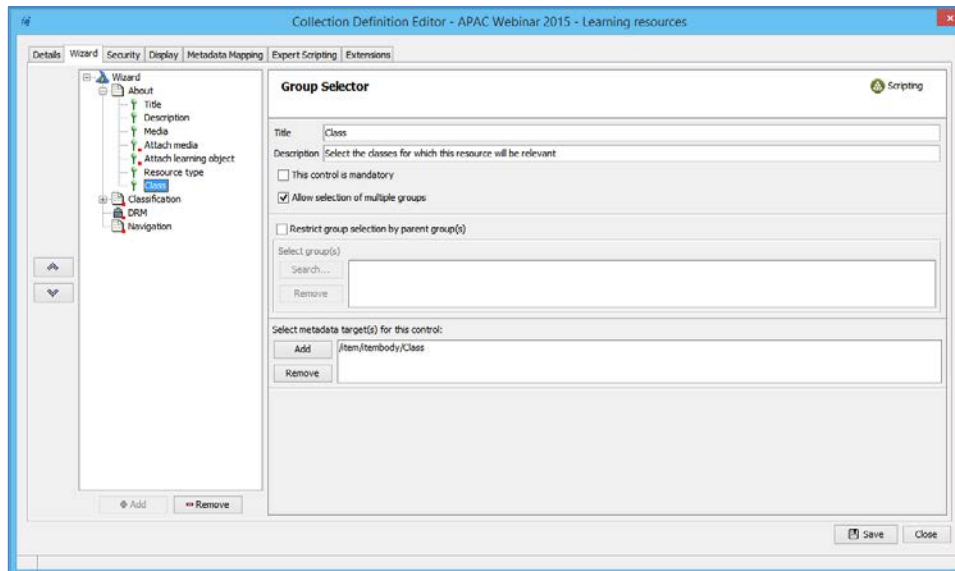


Figure 51 Group Selector control page

The **Group Selector** control elements are:

- **Allow selection of multiple groups**—check to allow more than one group to be selected.
- **Restrict group selection by parent groups**—check to restrict group selection to the selected parent groups. When using a restricted group selector during contribution, the user is notified of the available parent groups. Any 'child' groups belonging to those parent groups can be selected. (For more information about parent and child groups, see the *EQUELLA User Management Configuration Guide*.) An example is shown in Figure 52.

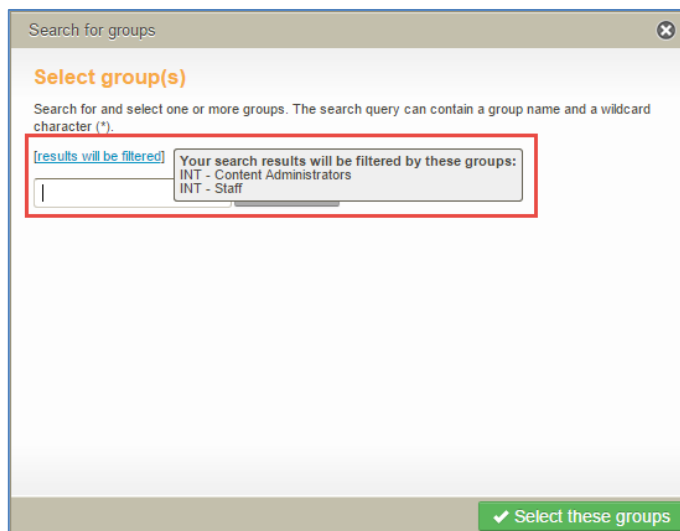


Figure 52 Search for groups dialog during contribution

Select group(s)

- **Search...**—click the button to display a **Selected group(s)** dialog. Enter search terms (e.g. *content*) in the search field and click **Search**. Matching results are returned. Leave blank to view all groups. An example is shown in Figure 53.

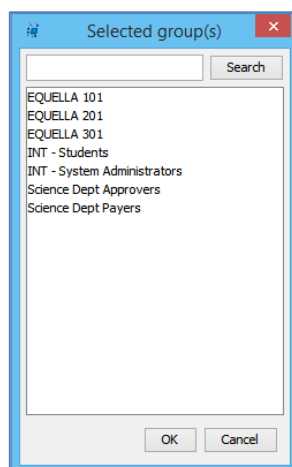


Figure 53 Selected group(s) dialog

Select the parent groups that users can select using the group selector during contribution.

HTML Edit Box

The **HTML Edit Box** control provides an inline editor within the contribution wizard that allows users to create web page content during contribution. An example is shown in Figure 54.

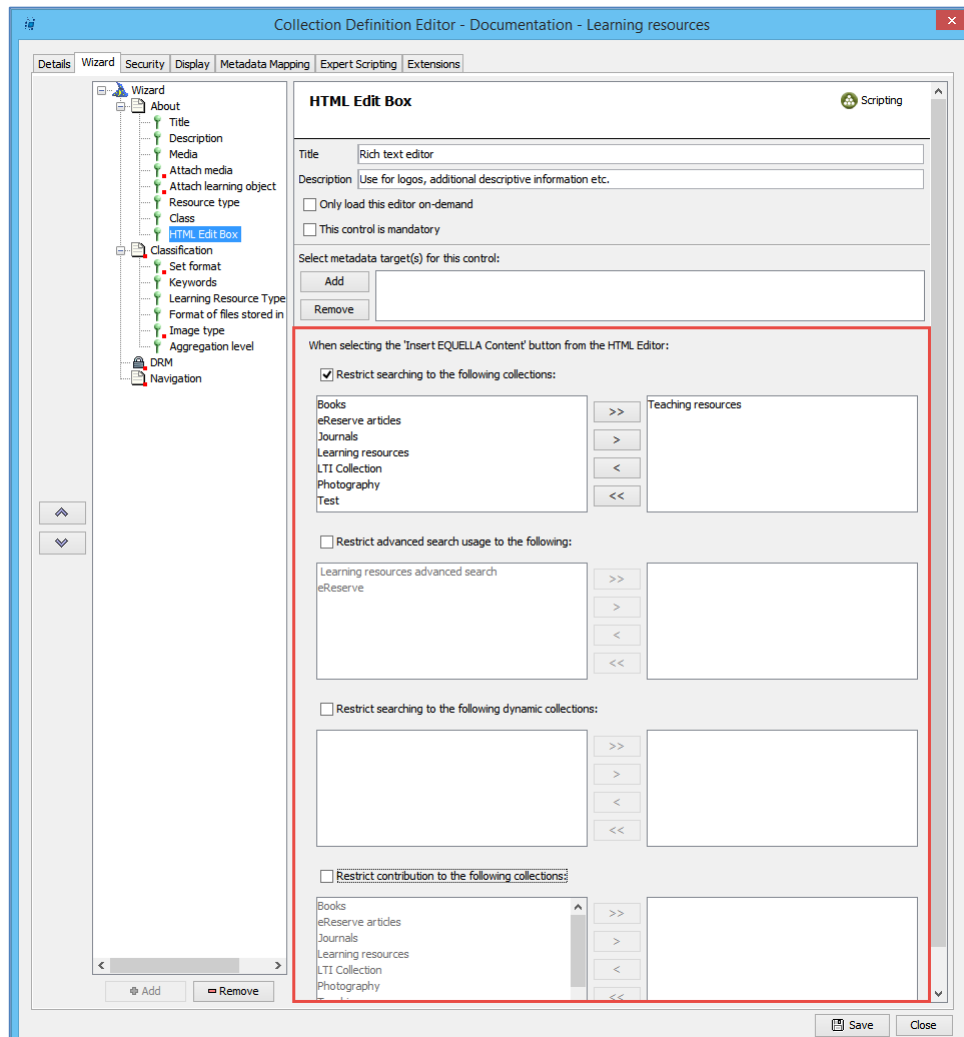


Figure 54 HTML Edit Box control page

The HTML Edit Box control elements are:

- **Only load this editor on-demand**—check to display the HTML Editor as read-only. An example is shown in Figure 55. Selecting this option can save page-loading time.

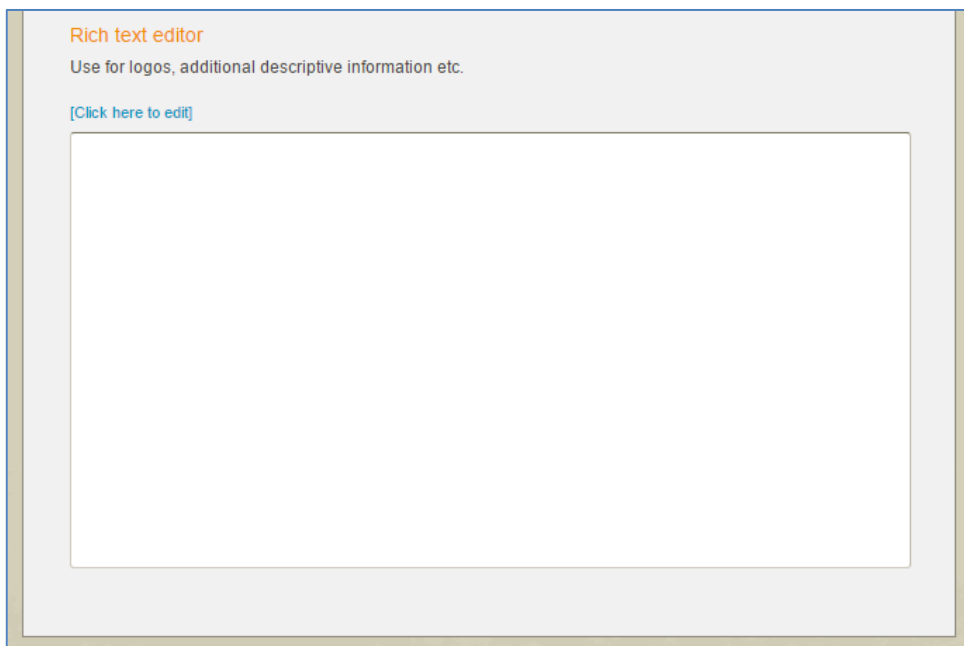


Figure 55 User's view of HTML Edit Box control (read-only)

Select the **[Click here to edit]** link to enable the HTML Editor. An example is shown in Figure 56.

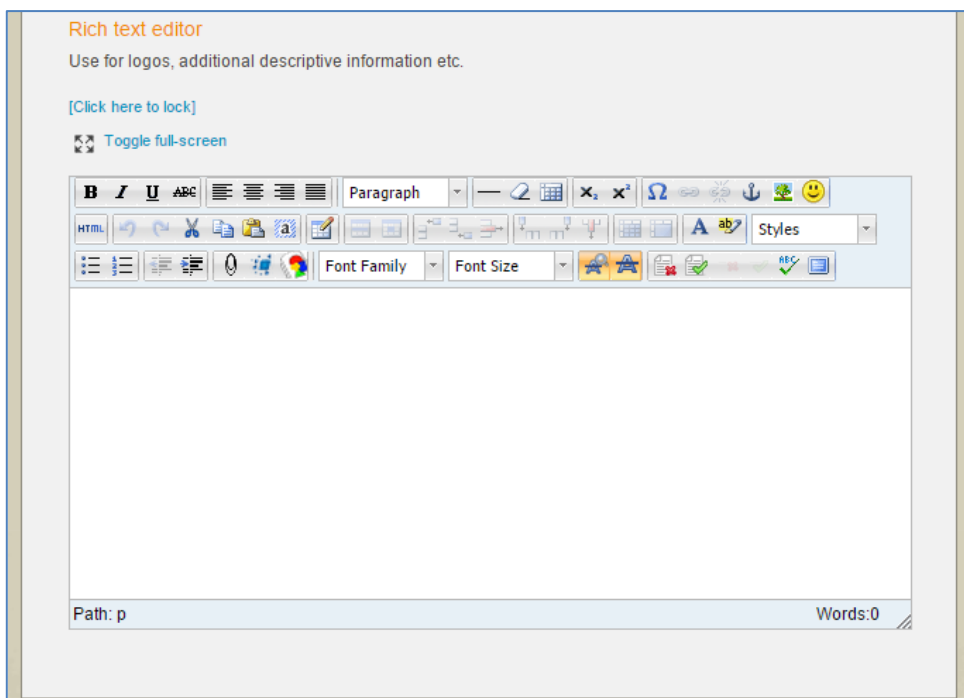


Figure 56 User's view of HTML Edit Box control (enabled)

Enter and/or edit content as required, then select the **[Click here to lock]** link to store updated content and return the Editor to a read-only state.

Leave the **Only load this editor on-demand** checkbox unchecked to load the HTML Editor automatically. An example is shown in Figure 57.

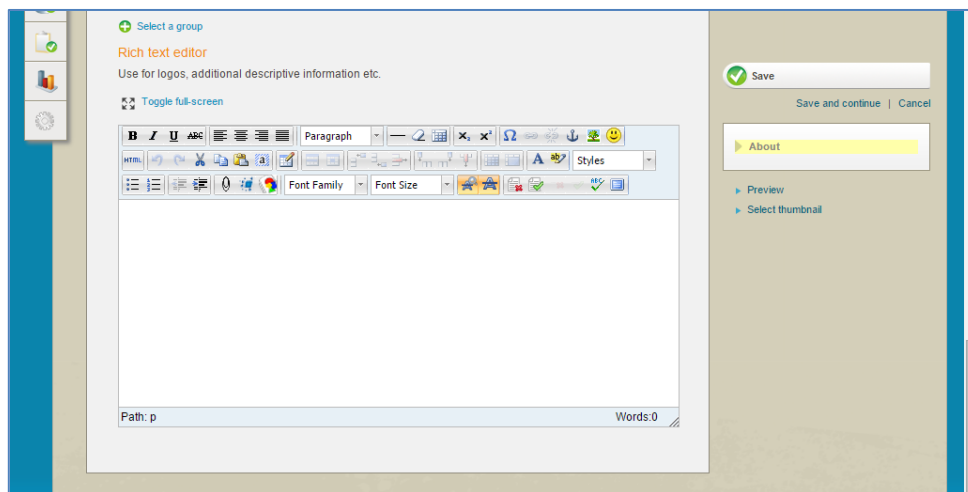



Figure 57 User's view of HTML Edit Box control

The **Insert EQUELLA Content** button  can be configured to allow searching within the entire repository, or searches can be restricted to particular collections, dynamic collections or advanced searched. Additionally, the collections available for contributions can be restricted. An example is shown in Figure 58.

When selecting the 'Insert EQUELLA Content' button from the HTML Editor:

☐ Restrict searching to the following collections:

Books	>>	
eReserve articles	>	
Journals	<	
Learning resources	<<	
Teaching resources		

☐ Restrict advanced search usage to the following:

Learning resources	>>	
eReserve	>	
	<	
	<<	

☐ Restrict searching to the following dynamic collections:



	>>	
	>	
	<	
	<<	



☐ Restrict contribution to the following collections:













Books	>>	
eReserve articles	>	
Journals	<	
Learning resources	<<	
Teaching resources		

Figure 58 HTML Editor Insert EQUELLA content button restrictions page

The *Insert EQUELLA Content* control elements are:

- **Restrict searching to the following collection:**—check to select the collections that can be searched. Move required collections to the right-hand pane of the shuffle box using the  button. The  button moves all collections at once. To remove

a selected collection, use the  button, or to remove all collections, use the  button.

- **Restrict advanced search usage to the following:**—check to limit the advanced searches that can be searched. Move required advanced searches to the right-hand pane of the shuffle box using the  button. The  button moves all advanced searches at once. To remove a selected advanced search, use the  button, or to remove all advanced searched, use the  button.
- **Restrict searching to the following dynamic collections:**—check to limit the dynamic collections that can be searched. Move required dynamic collections to the right-hand pane of the shuffle box using the  button. The  button moves all dynamic collections at once. To remove a selected dynamic collection, use the  button, or to remove all dynamic collections, use the  button.
- **Restrict contribution to the following collections:**—check to limit the collections available for contribution. This refers to the functionality provided by the **Contribute** button on the *Select* page during contribution. Select collections that can be contributed to by using the  button. The  button moves all collections at once. To remove a selected collection, use the  button, or to remove all collections, use the  button. (NOTE: For the Quick Contribute feature to be enabled on the *Select* page the collection must be selected in this option and in the *Settings* page *Selection sessions* function.)

If a search or contribution option has been restricted (checked) but no collections, searches or sources have been selected and moved to the right-hand pane, that option will not be available from the *Select* or *Search* page. For example, if the **Restrict contribution to the collections:** checkbox has been selected, but no collections have been moved to the right hand pane, the **Contribute** portlet does not display on the **Select** page.

See the *EQUELLA HTML Editor User Guide* for more information about using the editor.

List Box

The **List Box** control consists of a drop-down list where a single value can be selected. An example of the List Box control page is shown in Figure 59.

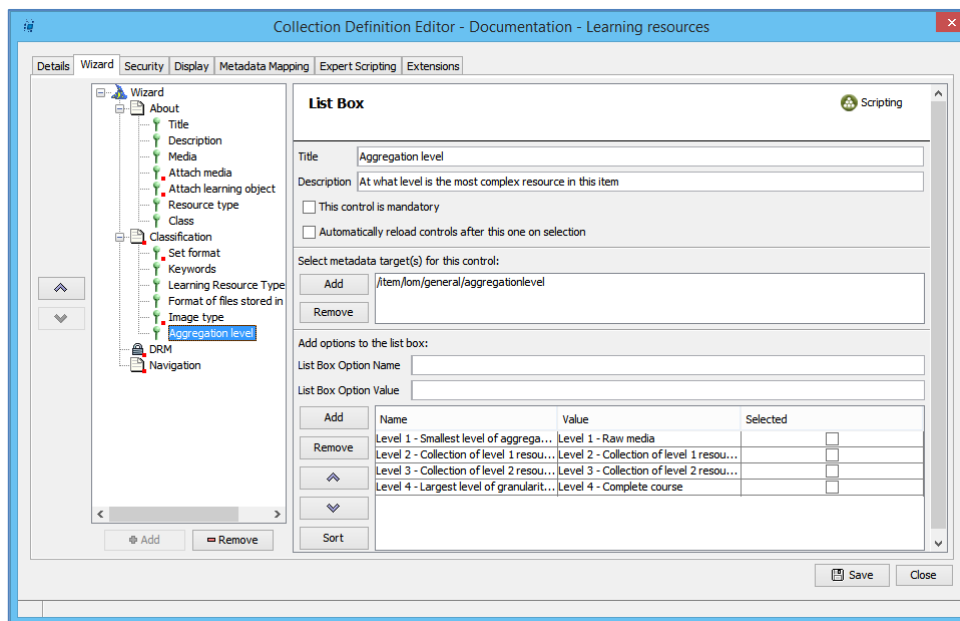


Figure 59 List Box control page

The List Box control elements are:

- **Automatically reload page on selection**—select when the control has an associated script and different controls or options need to be shown after the user's selection.

Add options to the List Box

- **List Box Option Name**—enter a name to be displayed in the list.
- **List Box Option Value**—enter a value to make it easily identifiable for an associated script (usually same as name). This is the value that will be stored in the metadata target.
- **Add**—click to add list box option names and values to the list.
- **Remove**—click to remove the selected list box option from the list.
- **Move up**—click to move the selected list box option above its neighbouring element.
- **Move down**—click to move the selected list box option below its neighbouring element.
- **Sort**—click the button to rearrange the list box option group into alphabetical order.
- **Selected**—check to set a list box option as a default. Uncheck the box to deselect the option.

Figure 60 shows an example list box as it is displayed in the contribution wizard. Click on the down arrow to display a drop-down list of available options.

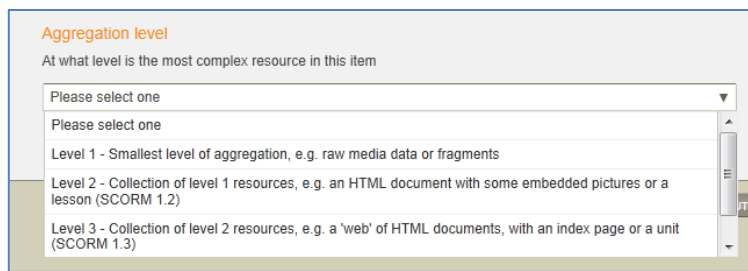


Figure 60 User's view of List Box control

The List Box control is also available in the Advanced Search Editor.

Multi-Language Edit Box

The **Multi-Language Edit Box** control can be used in place of a normal edit box that only stores non-language specific values. It allows users to input multiple language strings into the resource XML, so that the control will then display the string relevant to the selected language. Figure 61 shows an example of this control that has been configured with more than one contribution language.

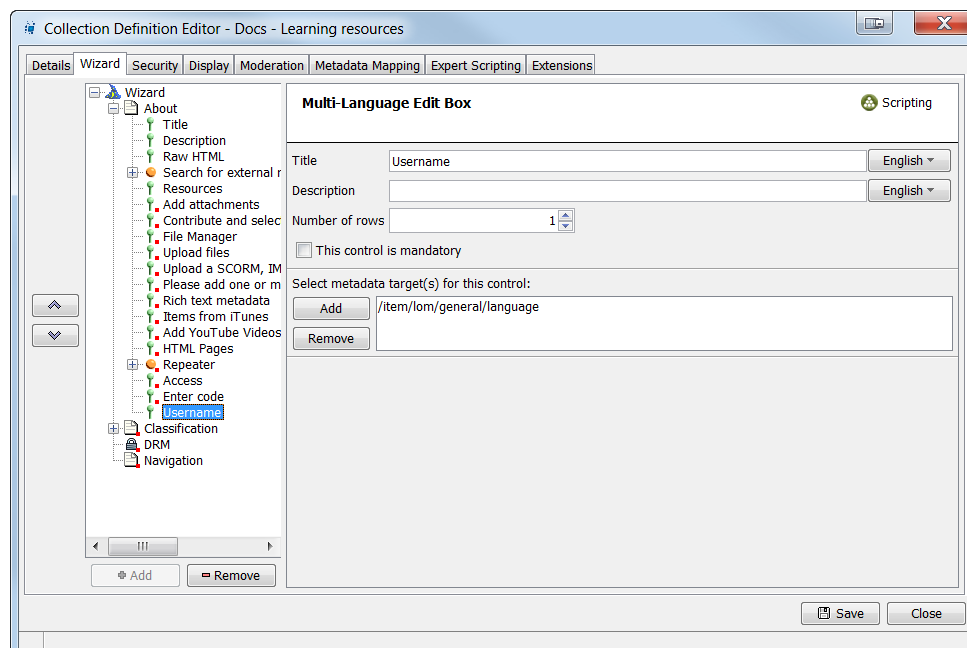



Figure 61 Multi-Language Edit Box control page

The Multi-Language Edit Box control elements are:

- **Number of rows**—select the number of rows displayed in the box. When more than one row is selected a scroll bar is added. The default setting is 1.
- **Language button**—in this example, the available contribution languages are *English* and *Indonesian*. (See the *EQUELLA Language Settings Administration Guide* for more information.) Click  to display the language options. An example is shown in Figure 62.

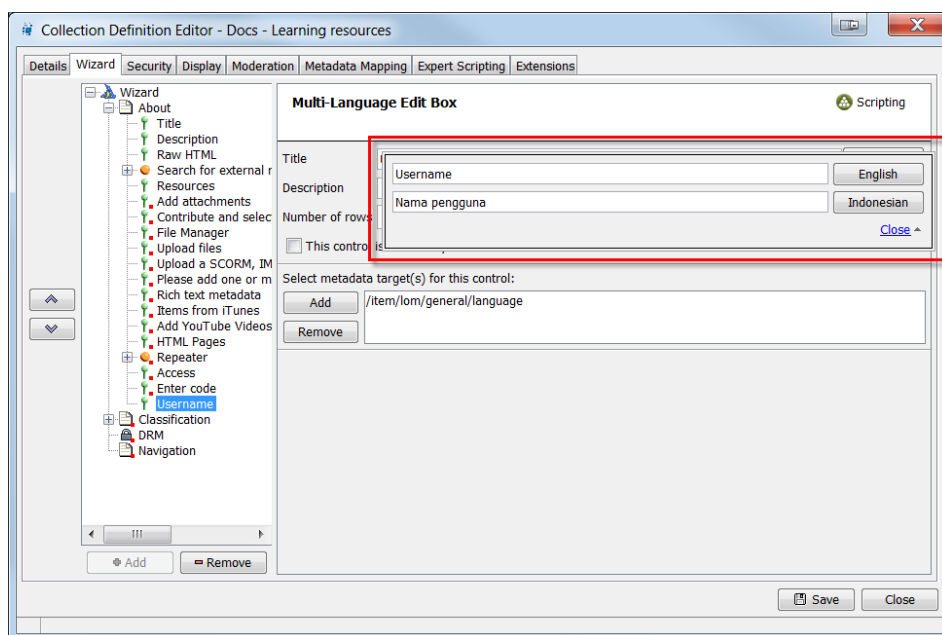


Figure 62 Multi-Language Edit Box language option dialog

Enter data in one or both language fields (e.g. *Username* in the **English** field and *Nama pengguna* in the **Indonesian** field).

An example of the Multi-Language Edit Box control in a contribution wizard is shown in Figure 63.

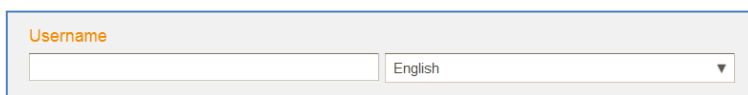


Figure 63 Multi-Language Edit Box control

Clicking the language drop-down (e.g. **English**) displays the option to select the other languages, or **<Show all>**. An example where the **<Show all>** option is selected is shown in Figure 64. Data can be entered in either language in the corresponding field.

Select the **Collapse** link to return to the default view.

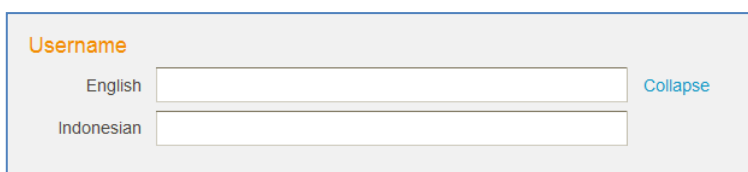


Figure 64 Multi-Language Edit Box control displaying language options

See the *EQUELLA Language Settings Guide* for more information.

Navigation Builder

The **Navigation Builder** control adds a page to the contribution wizard that allows users to:

- organise resource content into a package with customised navigation;
- provide content viewers with a 'split view' option where attachments can be viewed in two independent panes;
- rename files; and
- specify the viewer type for individual attachments.

An example is shown in Figure 65.

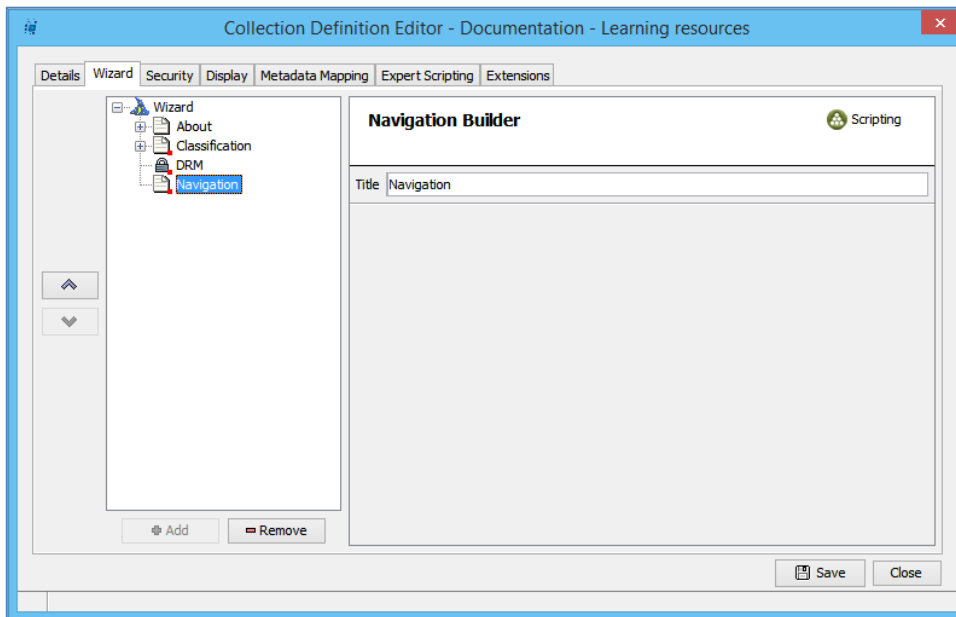


Figure 65 Navigation Builder control page

A Navigation Builder control will always be added as a new root element in the hierarchy.

Figure 66 shows a user's view of the Navigation Builder control.

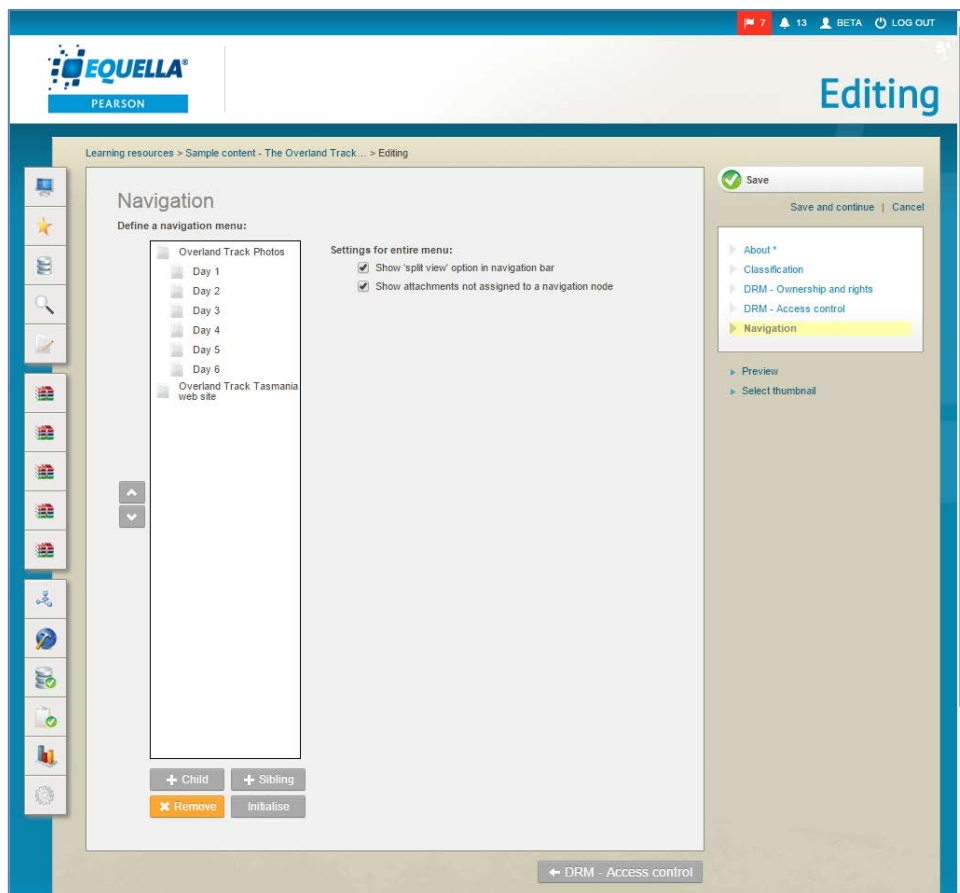


Figure 66 Navigation control showing an example navigation menu

See the *EQUELLA Contribution User Guide* for more information on using the Navigation Builder during contribution.

Page

Page controls provide logical steps and group relevant wizard controls in a contribution wizard, with each wizard comprising at least one page. Pages are displayed as links on the right-hand side of a contribution wizard. See the *EQUELLA Collection Definitions Configuration Guide* for more information.

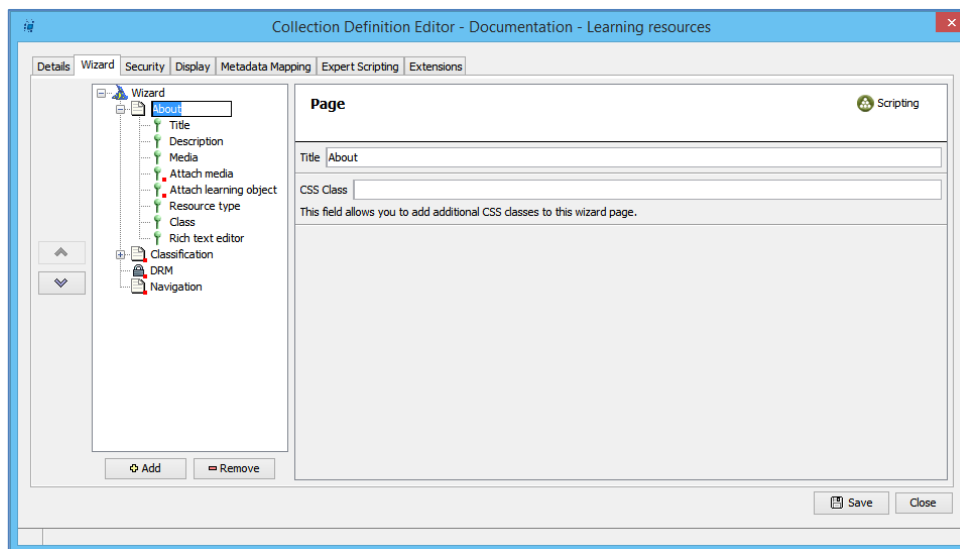


Figure 67 Page control page

The Page control element is:

- **Title**—enter a name (e.g. *About*) to be displayed to users on the wizard page. An example of a Title display is shown in Figure 68.

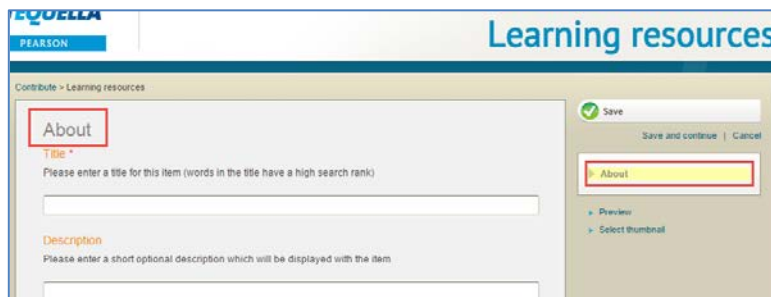


Figure 68 User's view of Page

A Page control is always added as a new root element in the hierarchy.

Radio Button Group

The **Radio Button Group** control displays a group of options where only one can be selected. An example is shown in Figure 69.

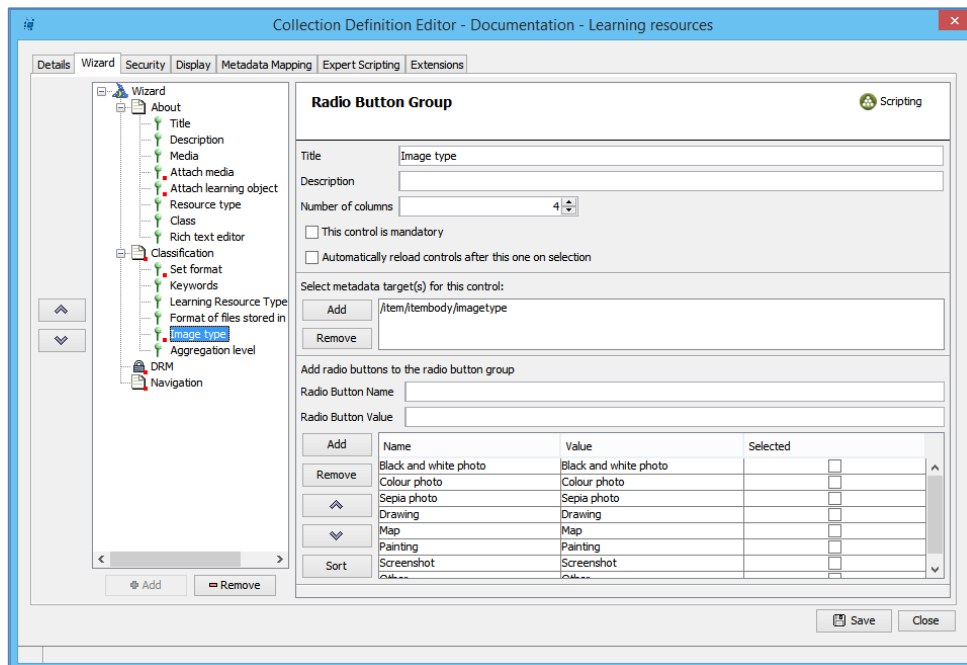


Figure 69 Radio Button Group control page

The Radio Button Group control elements are:

- **Number of columns**—select how many columns will be displayed on the wizard page. The default setting is 1.
- **Automatically reload page on selection**—check when the control has an associated script and different controls or options need to be shown after the user's selection.

Add radio buttons to the Radio Button Group

- **Radio Button Name**—enter a name to be displayed next to the radio button.
- **Radio Button Value**—enter a value to make it easily identifiable for an associated script. This is the value that will be stored in the metadata target.
- **Add**—click to add radio button names and values to the list.
- **Remove**—click to remove the selected radio button from the list.
- **Up**—click to move the selected radio button above its neighbouring element.
- **Down**—click to move the selected radio button below its neighbouring element.
- **Sort**—click the button to rearrange the radio button group into alphabetical order.
- **Selected**—check to set a radio button as the default. Uncheck the box to deselect the option.

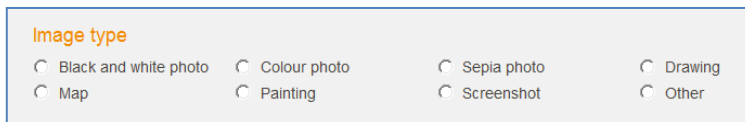


Figure 70 User's view of Radio Button Group control

The Radio Button Group control is also available in the Advanced Search Editor.

Raw HTML

The **Raw HTML** control enables the entry of HTML to enhance the design and usability of wizard pages. An example is shown in Figure 71.

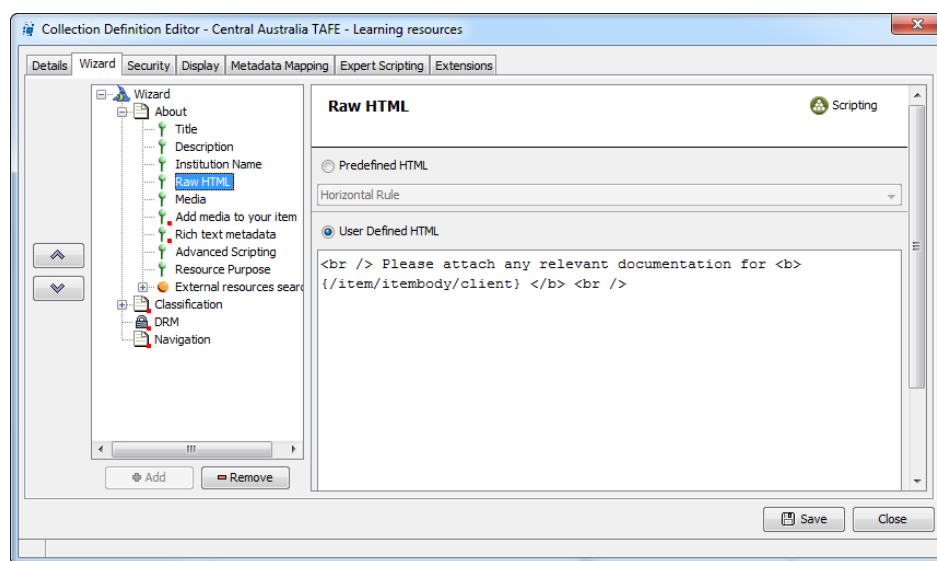


Figure 71 Raw HTML control page

The Raw HTML control elements are:

- **Predefined HTML**—select to insert a horizontal rule on a wizard page.
- **User defined HTML**—enter HTML (e.g. to provide additional information on a wizard page). Metadata can be selected using the format `{/xpath/to/my/data}`, for example selecting the `{/item/itembody/client}` path populates the corresponding field in the contribution wizard with data matching the selected path (e.g. *University of QUELLA*). An example is shown in Figure 72.

About

Title *
Please enter a title for this item (words in the title have a high search rank)

Test

Description
Please enter a short optional description which will be displayed with the item

Institution Name
University of EQUELLA

Please attach any relevant documentation for University of EQUELLA

Media
Please select the media to attach to your item

☐ Media

Figure 72 User's view of Raw HTML control with selected metadata displayed

The Raw HTML control is also available in the Advanced Search Editor.

Repeater

The **Repeater** control creates a field that can be duplicated on the wizard page. It can be used in instances such as copyright, when entering several book chapters, where each chapter consists of repeated input elements like title, chapter number, author and so on. A Repeater control cannot be used in isolation—it requires at least one child to be added. Depending on the type of data being collected, any controls can be used. Figure 73 shows an example Repeater control.

Collection Definition Editor - Documentation - eReserve articles

Details | Wizard | Security | Display | Metadata Mapping | Expert Scripting | Extensions

Repeater

Title: Available section

Description:

Noun for 'add' button: additional section

Minimum number of repeats: 1

Maximum number of repeats: 50

Select metadata target(s) for this control: /item/copyright/portions/portion/sections/section

Save Close

Figure 73 Repeater control page

The Repeater control elements are:

- **Noun for 'add' button**—enter words to be added to the button label text. For example, '*additional section*' creates the button label **Add additional section** on the wizard page.
- **Minimum/Maximum number of repeats**—enter the quantity of repeats allowed. The default minimum number of repeats is set at one and the maximum at ten repeats.

Figure 74 shows an example of the user's view of a Repeater control where users can input multiple fields and attach a file.

The screenshot shows a web form titled "Available section" in orange text. Inside the form, there are two radio buttons: "File" (selected) and "URL". To the right of these are three small icons: a downward arrow, an upward arrow, and a close 'X' icon. Below the radio buttons is an orange instruction: "Upload your file here (use 'Add additional section for more than 1 file') *". Underneath is a text box containing "No attached resources". Below that is a green plus icon followed by the text "Add a resource". Then, another orange instruction: "Page range e.g. 101-105; 107, 109-110 *". Below this is another empty text box. Further down is a grey "Refresh" button. At the bottom of the main form area is a checkbox labeled "Does this have an Illustration/Table?". Below the entire form area is a separate grey button with a plus icon and the text "+ Add additional section".

Figure 74 User's view of Repeater control

Click the **Add + <noun>** (e.g. **+ Add additional section**) button to insert a duplicate section to the wizard page.

Role selector

The **Role Selector** control enables the selection of roles and stores the details with the resource metadata. For example, the role selector could be used with a *Dynamic metadata ACL* to select roles whose users have access to a collection or even specific item. Figure 75 shows an example Role Selector control page.

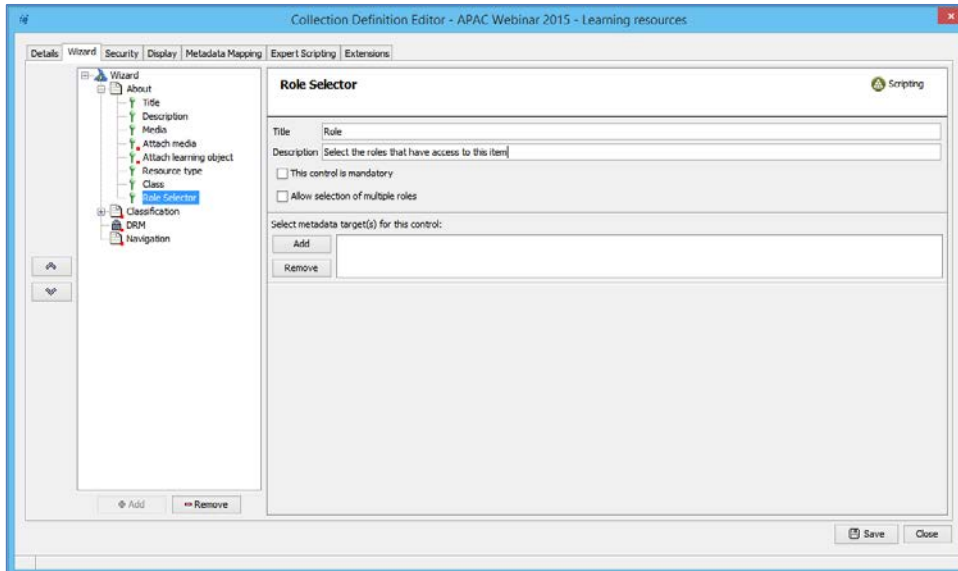


Figure 75 Role Selector control page

The **Role Selector** control elements are:

- **Allow selection of multiple roles**—check to allow more than one role to be selected.

Shuffle Box

The **Shuffle Box** control allows users to select one or more items by moving them from one pane to another using arrow buttons. An example of the Shuffle Box control page is shown in Figure 76.

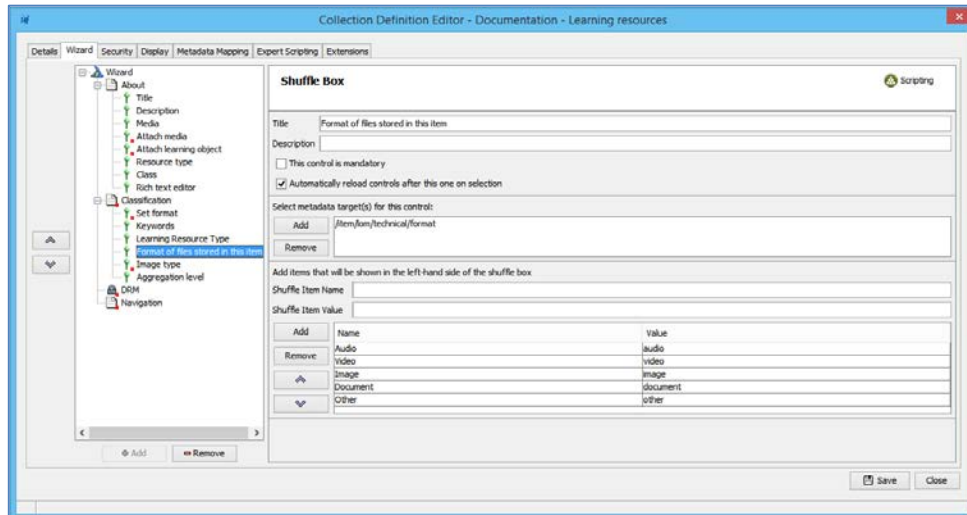


Figure 76 Shuffle Box control page

The Shuffle Box control elements are:

- **Automatically reload controls after this one on selection**—check when other wizard elements have associated scripts to change their state after the user makes a selection on this control.

Add items that will be shown in the left-hand side of the Shuffle Box

- **Shuffle Item Name**—enter a name to be displayed in the Shuffle Box.
- **Shuffle Item Value**—enter a value to make it easily identifiable for an associated script. This is the value that will be stored in the metadata target.
- **Add**—click to add shuffle item names and values to the list.
- **Remove**—click to remove the selected shuffle item from the list.
- **Up Arrow**—click to move the selected shuffle item above its neighbouring element.
- **Down Arrow**—click to move the selected shuffle item below its neighbouring element.

Figure 77 shows a user's view of a shuffle box in a contribution wizard.

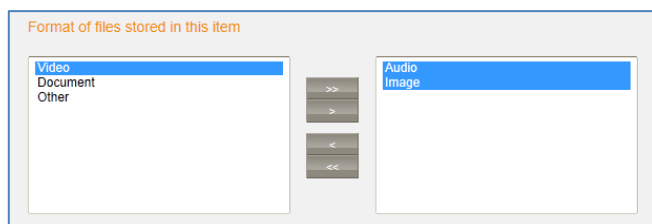


Figure 77 User's view of Shuffle Box

The Shuffle Box control is also available in the Advanced Search Editor.

Shuffle Group

The **Shuffle Group** control allows users to add, delete or edit groups of details in a list (e.g. multiple contributor or publisher details). It requires one or more children, in the form of Edit Box and List Box controls, to be added and cannot be used in isolation. An example of a Shuffle Group control with two Edit Box controls is shown in Figure 78.

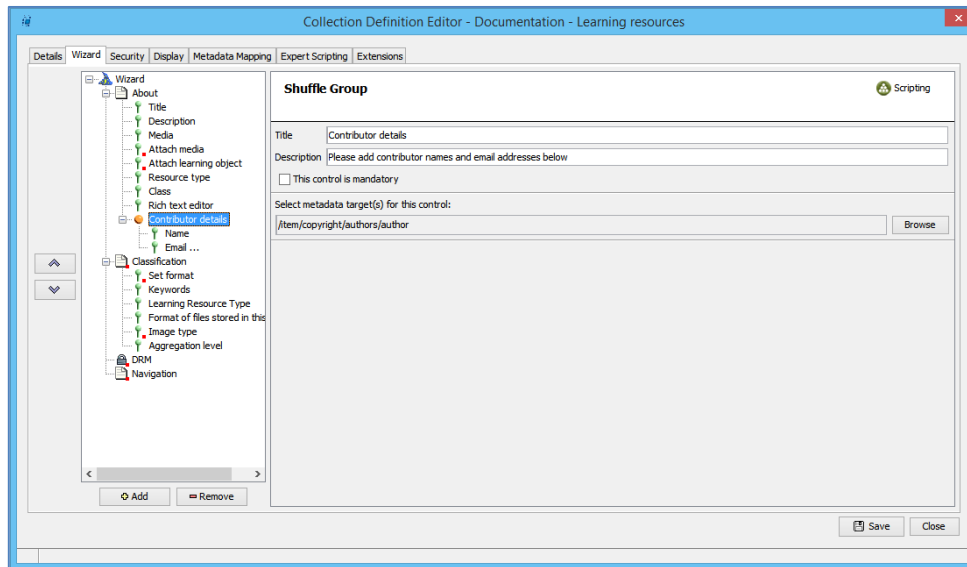


Figure 78 Shuffle Group control page

An example of this control as it appears in the Contribution Wizard is shown in Figure 79.

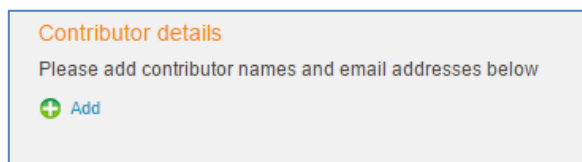


Figure 79 User's view of Shuffle Group

Clicking the **Add** link opens a window displaying the child controls. An example is shown in Figure 80.

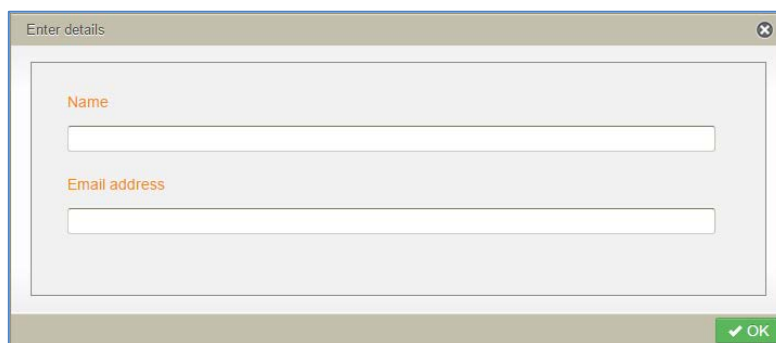


Figure 80 Shuffle Group window—child controls

Entering any required information and clicking **OK** will close the window and populate the control with the entered information. An example is shown in Figure 81.

Figure 81 Populated Shuffle Group control

Shuffle List

The **Shuffle List** control allows users to add any number of elements to a list (e.g. a list of multiple authors relating to a single document). An example of the Shuffle List control page is shown in Figure 82.

Figure 82 Shuffle List control page

The Shuffle List control elements are:

- **Warn contributor if data in this field is not unique for items in the collection**—if data is not unique, users will be asked to accept the duplication during contribution before the resource can be submitted. For the checking to perform correctly, ensure each metadata target on the chosen schema is marked as 'Indexed for Advanced Searching'
- **Enforce that data in this field is unique for items in this collection**—this option is only enabled if the preceding option is selected. When this box is checked, data entered must be unique. Users will be alerted to any duplication, and if the data is not altered to be unique, the resource can only be submitted as a draft.

Figure 83 shows a user's view of a shuffle list in a contribution wizard.

Figure 83 User's view of Shuffle List

The Shuffle List control is also available in the Advanced Search Editor. An additional **Tokenise values** checkbox is available for this control in the Advanced Search Editor. An example is shown in Figure 84.

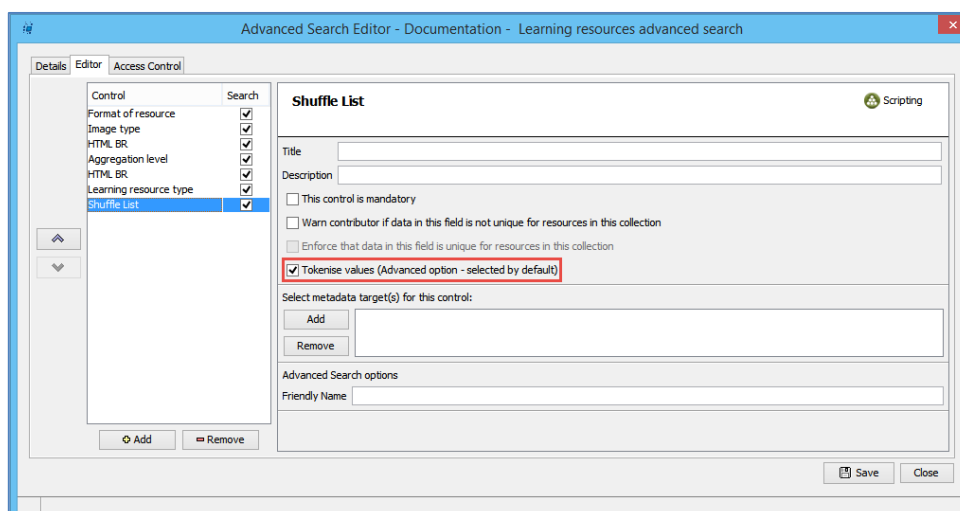


Figure 84 Advanced Search Editor—Shuffle List control page

This option is selected by default. If selected, each line of text entered in the shuffle list is split up into words for searching purposes. For example, the line *English 101* will be searched by '*English*' and '*101*'. If the option is not selected, each line of text is matched exactly in a search, returning only resources that have the exact term (e.g. '*English 101*').

Static Metadata

The **Static Metadata** control stores information that is fixed for all resources of a collection. Static metadata is held in selected schema nodes nominated as metadata targets. An example is shown in Figure 85. It is not recommended that a schema node is used as a metadata target for both static metadata and a control.

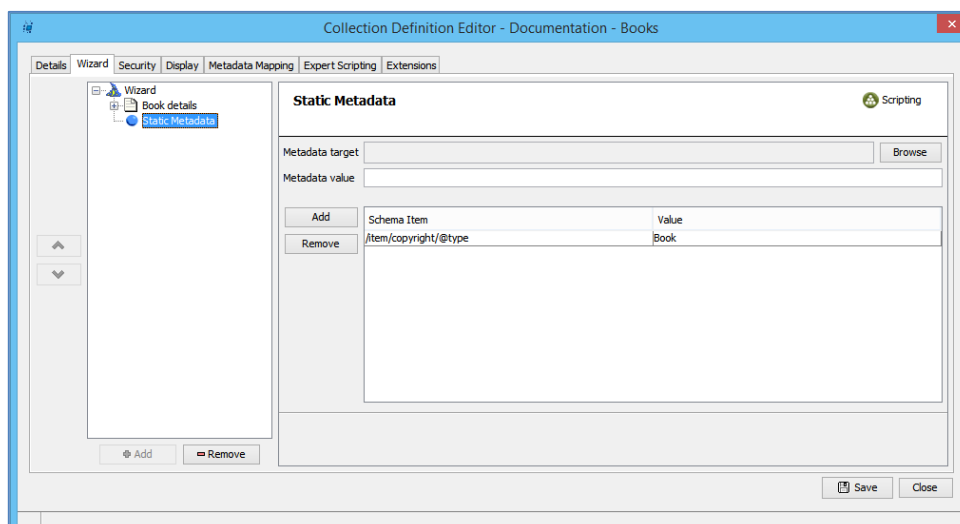


Figure 85 Static Metadata control page

A Static Metadata control is always added as a new root element in the hierarchy.

The Static Metadata control elements are:

- **Metadata target**—click to display a dialog enabling the selection of an associated schema node (e.g. `/item/copyright/@type`).
- **Metadata value**—enter the metadata label (e.g. *Book*).
- —click the button to add the current metadata value to the metadata target and display the association list.
- —click the button to remove the selected metadata target and value from the association list.

The value of **Schema Item/Value** pairs displayed in the association list become editable if double-clicked.

(NOTE: Static metadata is not visible to users during resource contribution.)

Term Selector

The **Term Selector** control is used for the selection of terms associated with a pre-authored taxonomy. An example is shown in Figure 86.

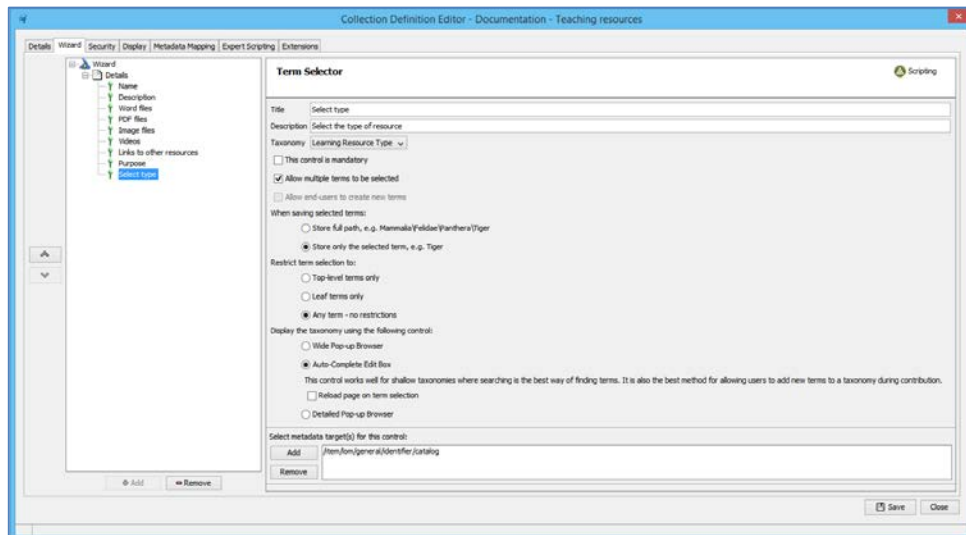


Figure 86 Term Selector control page

The Term Selector control elements are:

- **Taxonomy**—select a taxonomy from the drop-down list. Taxonomies are configured in the Administration Console **Taxonomy Editor**. See the *EQUELLA Taxonomies Guide* for further information.
- **Allow multiple terms to be selected**—check to allow more than one value from the list during contribution.
- **Allow end-users to create new terms**—check to allow users to add new terms to the selected taxonomy during contribution. (NOTE: This checkbox is only enabled if the 'Allow end-users to add new terms during contribution' checkbox is checked in the *Taxonomy Editor for the selected taxonomy*. See the *EQUELLA Taxonomies Guide for more information*.)
- **When saving selected terms**—select to store the term as:
 - full path (e.g. Universe\Animal\Mammal\Cat); or

- individual term (e.g. *Cat*).
- **Restrict term selection to**—select an option to control the type of term selected:
 - Top-level terms only
 - Leaf terms only
 - Any term—no restrictions
- **Display the taxonomy using the following control**—select the type of control to display in the contribution wizard:
 - **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 (see below) 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 87.

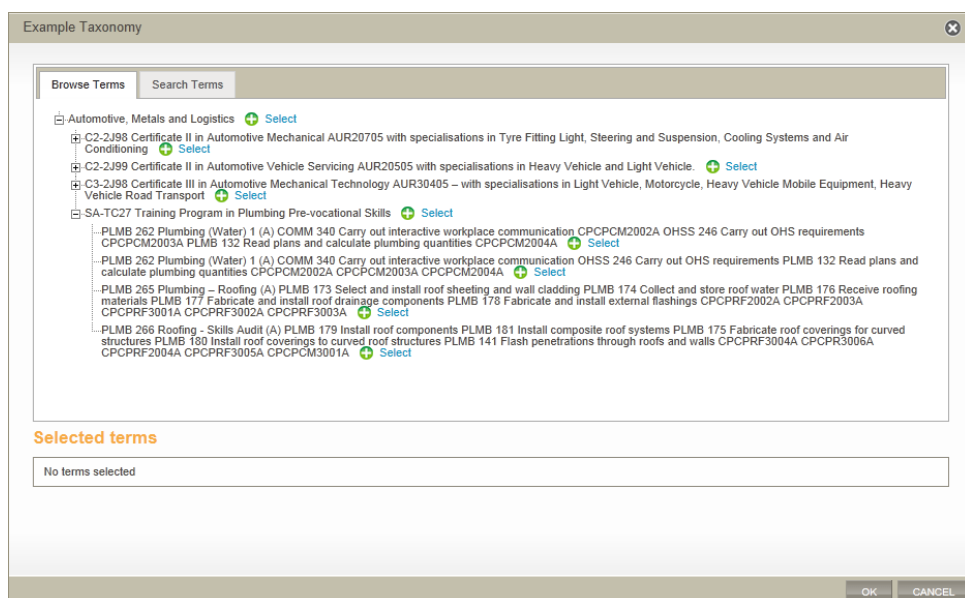


Figure 87 User's view of Term selector Wide Pop-up browser

- **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. An example is shown in Figure 88. A checkbox to **Reload page on term selection** can be selected.

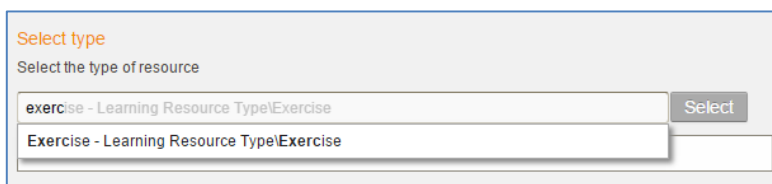


Figure 88 User's view of Term Selector control—Auto-Complete Edit Box display

- **Detailed Pop-up Browser**—select to display a modal dialog that allows users to browse or search for terms. The right pane of the Pop-up Browser displays details associated with the selected taxonomy term. 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 89.

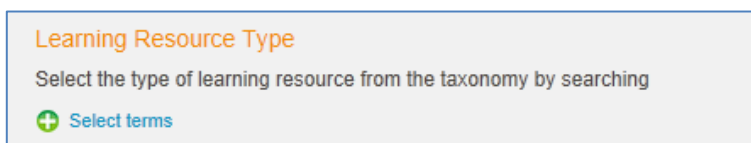


Figure 89 User's view of Term Selector control—Pop-up Browser display

Click the **Select terms** link to open the pop-up browser. An example is shown in Figure 90.



Figure 90 User's view of Term selector Detailed Pop-up browser

The Term Selector control is also available in the Advanced Search Editor.

User Selector

The **User Selector** control enables the selection of users and stores their details with the resource metadata. For example, the user selector could be used to assign workflow tasks to specific users during the workflow process. Figure 91 shows an example User Selector control page.

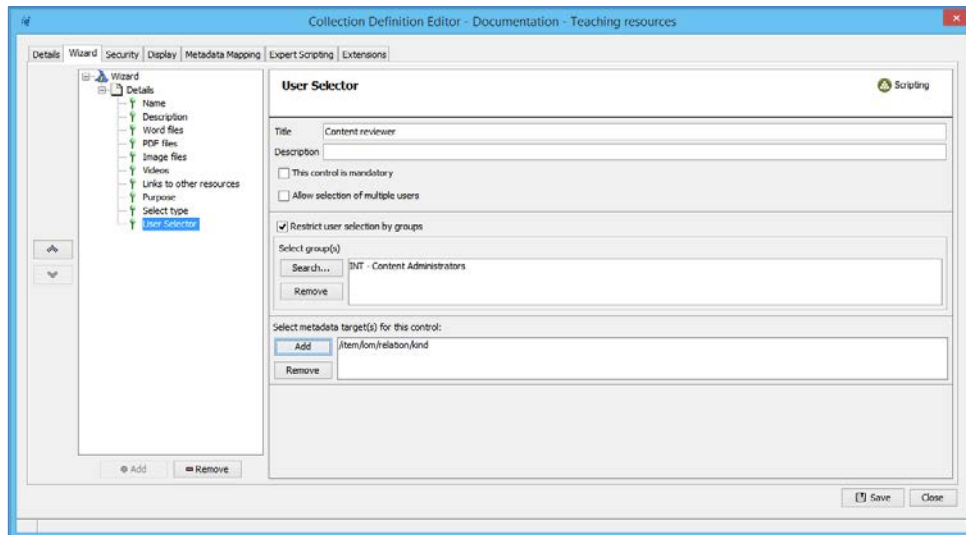


Figure 91 User Selector control page

The **User Selector** control elements are:

- **Allow selection of multiple users**—check to allow more than one user to be selected.
- **Restrict user selection by groups**—check to specify a group or groups that selected users must belong to. The **Select group(s)** pane displays if this option is selected.

Select group(s)

- **Search...**—click the button to display a **Selected group(s)** dialog. Enter search terms (e.g. *content*) in the search field and click **Search**. Matching results are returned. An example is shown in Figure 92.

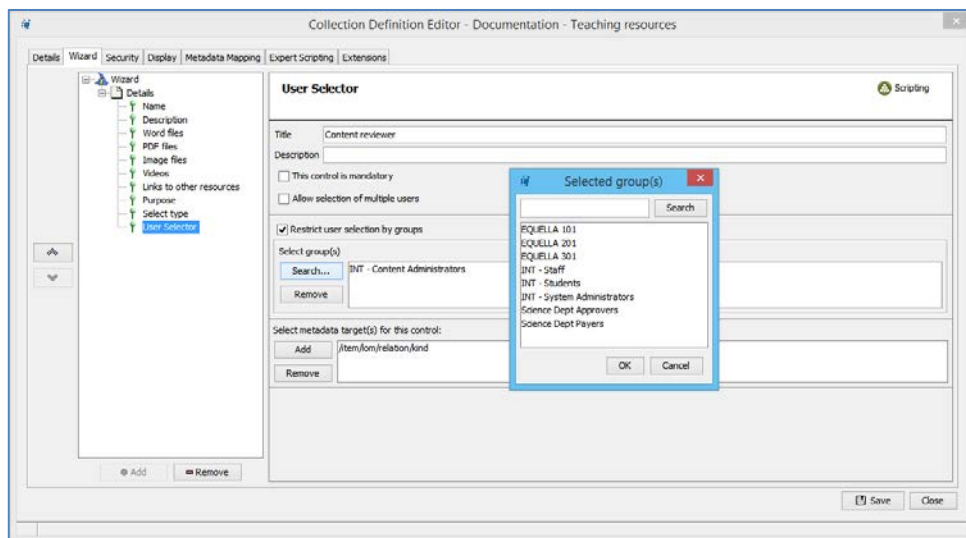


Figure 92 Selected group(s) results

(NOTE: If the wildcard symbol (*) is entered or the search field is left blank, all groups will be returned when the Search button is clicked.)

Click on a group to select it (e.g. *Int – Content Administrators*), then click **OK**. Hold the CTRL key while clicking to select multiple groups. The selected group is added to the **Select group(s)** pane. An example is shown in Figure 91. Only users belonging to this group can be selected during resource contribution.

If the collection is designed to use this control as a moderator assigning tool with an associated workflow, the same group must be selected in the **Workflow Task Editor—Moderators** tab. See the *EQUELLA Workflow Configuration Guide* for more information.

- **Select metadata target(s) for this control**—the selected metadata target must be specific for this control to avoid conflicts. If the collection has an associated workflow, the same metadata target must be selected in the **Choose moderators based on a list of users stored in item metadata** option on the **Workflow Task Editor—Moderators** tab.

Figure 93 shows an example of the User Selector control with a selected user.

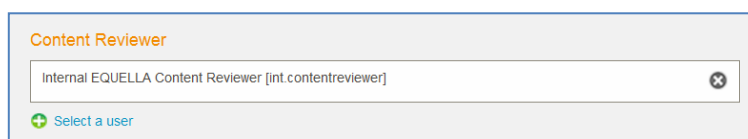


Figure 93 User Selector control

The User Selector control is also available in the Advanced Search Editor.

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>.