

EQUELLA[®]

Advanced Search Configuration Guide

Version 6.0

Document History

Document No.	Reviewed		Finalised		Published	
1	17/10/2012		17/10/2012		17/10/2012	

October 2012 edition.

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Advanced search overview

The EQUELLA **Advanced Search** function (previously known as **Power search**) provides a means of searching within specific metadata associated with a resource. Each advanced search must be associated with a particular metadata schema, which makes it customised for certain resource types, enabling refined searches within those resource types. It makes searching for a particular resource easier, and can be targeted to specific users, groups or roles.

The purpose of this guide is to provide administrators with an understanding of the configuration and use of the Advanced Search function.

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.

Advanced search configuration

Advanced searches are created and maintained via the **Advanced Searches** configuration tool accessed from the Administration Console.

To access Advanced Searches configuration tool

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

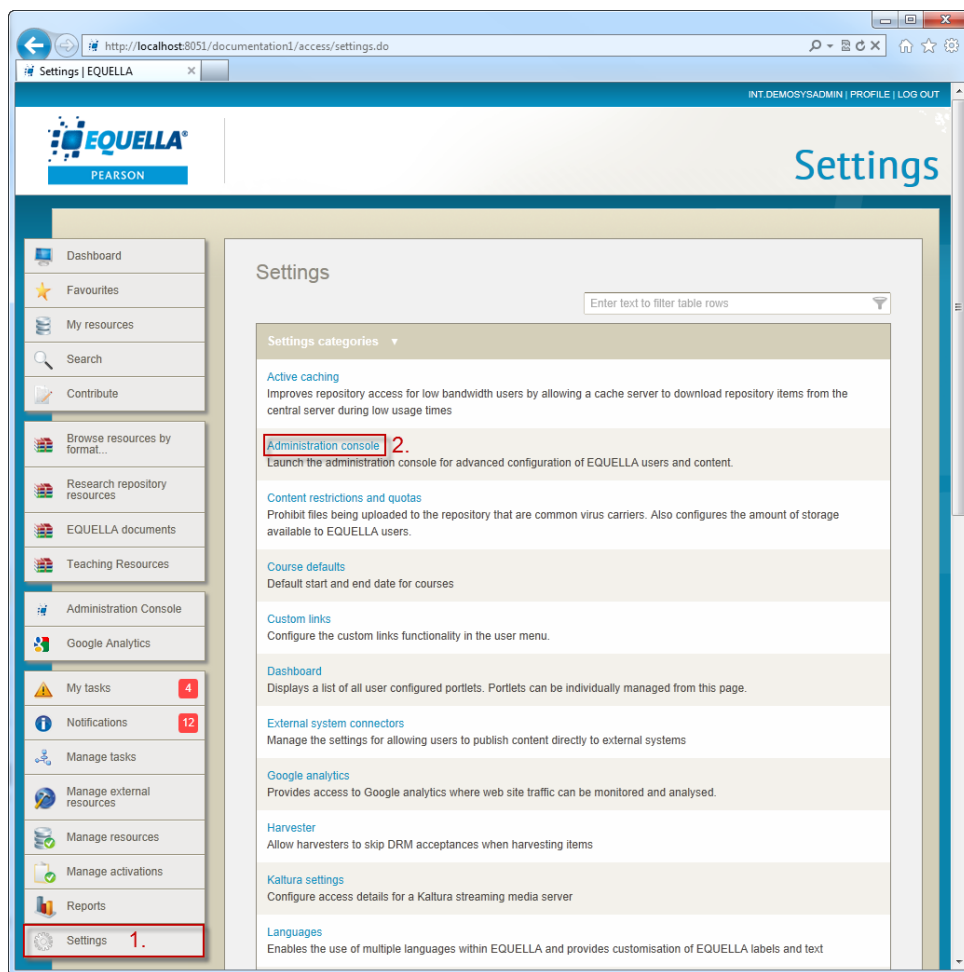


Figure 1 Open Administration console

2. The Administration console displays. Select **Advanced Searches**, as shown in Figure 2.

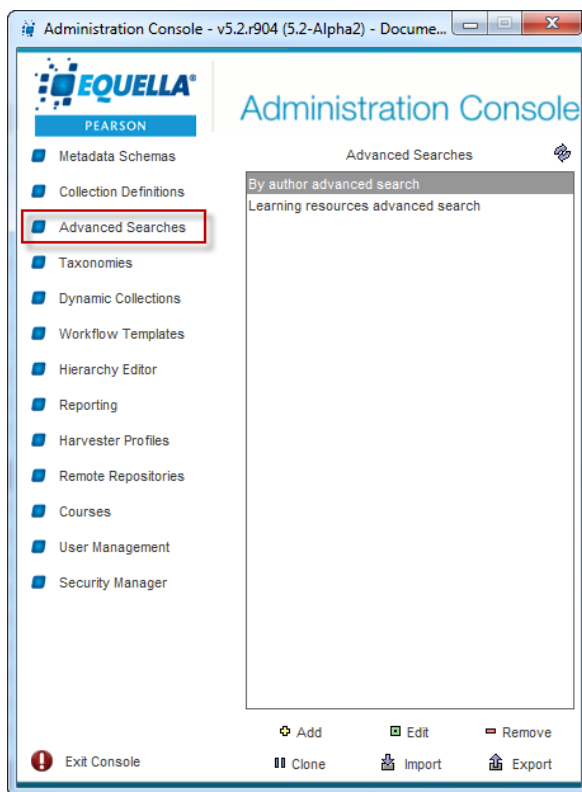


Figure 2 Administration console—Advanced Searches

Administration console elements

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

- **Add**—click **Add** to display the **Advanced Search Editor** where a new advanced search can be created. See [Create an advanced search](#) on page 11 for more information.
- **Edit**—select an advanced search then click **Edit**, or double-click on an advanced search, to display the **Advanced Search Editor** to modify the selected advanced search. If the selected advanced search is being edited by another user a **Locked** dialog is displayed as shown in Figure 3, providing the following options:
 - **Open as read-only**—disables the **Save** button so that no changes can be committed.
 - **Forcefully unlock**—unlocks the entity from the previous editor. Editing is possible but changes by other users may be lost.
 - **Do not open**—the advanced search configuration screen will not be opened.

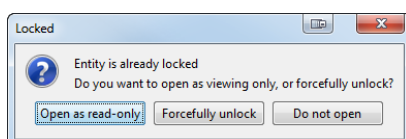





Figure 3 Locked entity dialog

- **Remove**—click  **Remove** to delete the selected advanced search.
- **Clone**—click  **Clone** to copy an existing advanced search. The cloned search can then be modified by selecting the **Edit** button.
- **Import**—click  **Import** to import an advanced search that has previously been exported from the Administration Console. A warning dialog displays, as shown in Figure 4. *(NOTE: Only ZIP files that have been exported from the Administration Console should be imported—other ZIP files may adversely affect the stability of the system.)*

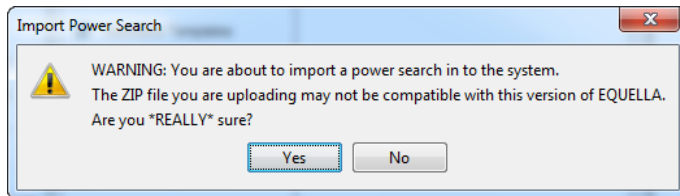



Figure 4 Import Advanced Search warning dialog

- **Export**—click  **Export** to export an advanced search as a ZIP file.

Metadata targets

Every advanced search must be associated with a metadata schema and the collections that use that schema. When configuring an advanced search, defined metadata targets, or nodes, within the schema are selected. Each one of these metadata targets must be set up for advanced search indexing. See the *EQUELLA Schema Reference Guide* for more information on creating and maintaining schemas.

To set up metadata schema nodes to index for advanced searching

1. Select the **Metadata Schemas** option from the Administration Console to display the Metadata Schemas pane on the right-hand side of the page. A list of existing metadata schemas displays. An example is shown in Figure 5.

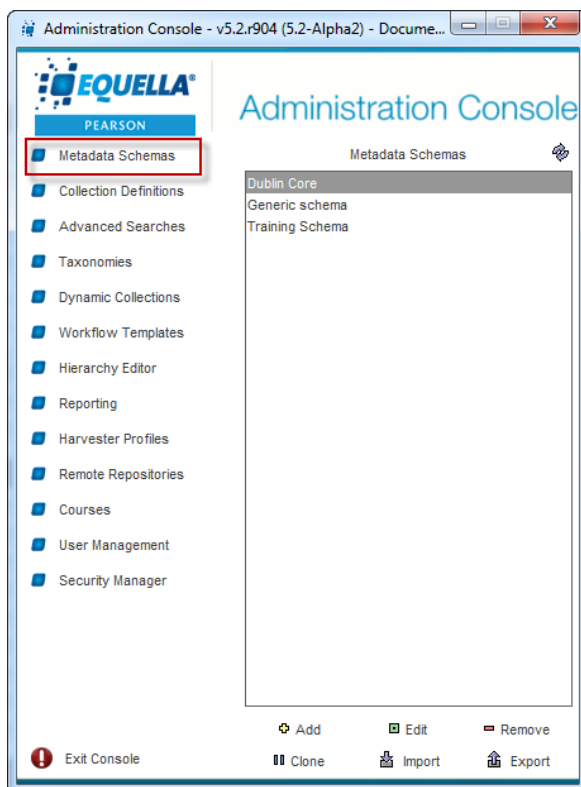


Figure 5 Administration Console—Metadata Schemas pane

2. Select the relevant schema from the list (*e.g. Generic Schema*).
3. Double-click or select the **Edit** link. The **Schema Manager** will open at the **Details** page as shown in Figure 6.

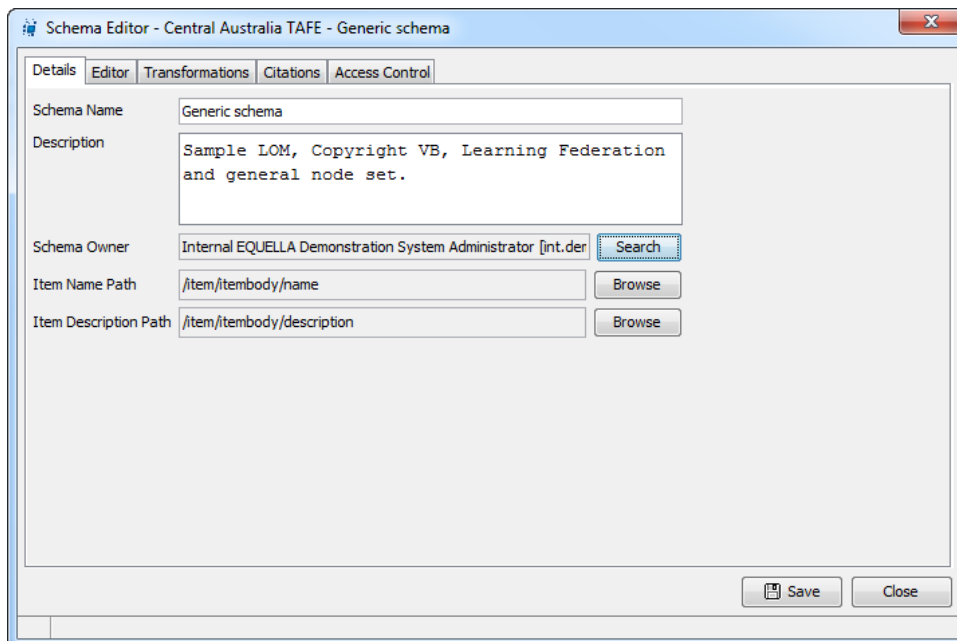


Figure 6 Schema Manager—Details page

4. Select the **Editor** tab. The **Schema Manager—Editor** page is displayed as shown in Figure 7.

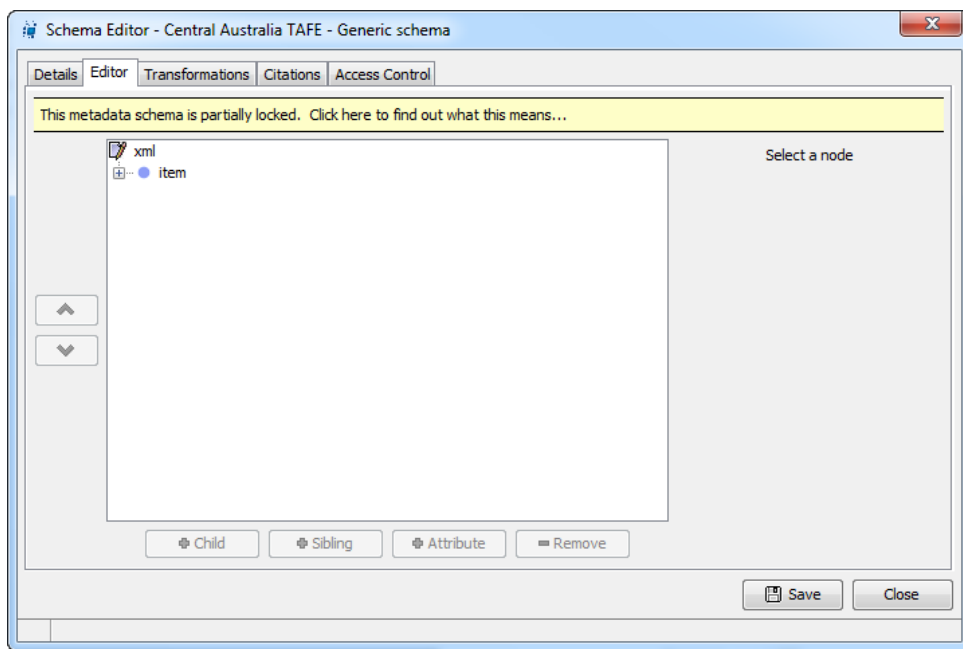


Figure 7 Schema Manager—Editor page

Previously created metadata schemas display an information bar stating that the schema is 'partially locked', meaning that only certain types of actions can be performed that will not be detrimental to existing resources contributed with this schema. Unlocking a schema allows for complete control, but some changes to a schema can cause associated collections or searches to create invalid data or not perform correctly. Be mindful of this risk when choosing to unlock and change any elements of an existing schema.

You will need to choose to unlock the schema to access the advanced search indexing field:

5. Click the gold information bar. The **Schema Partially Locked** dialog is displayed. An example is shown in Figure 8.

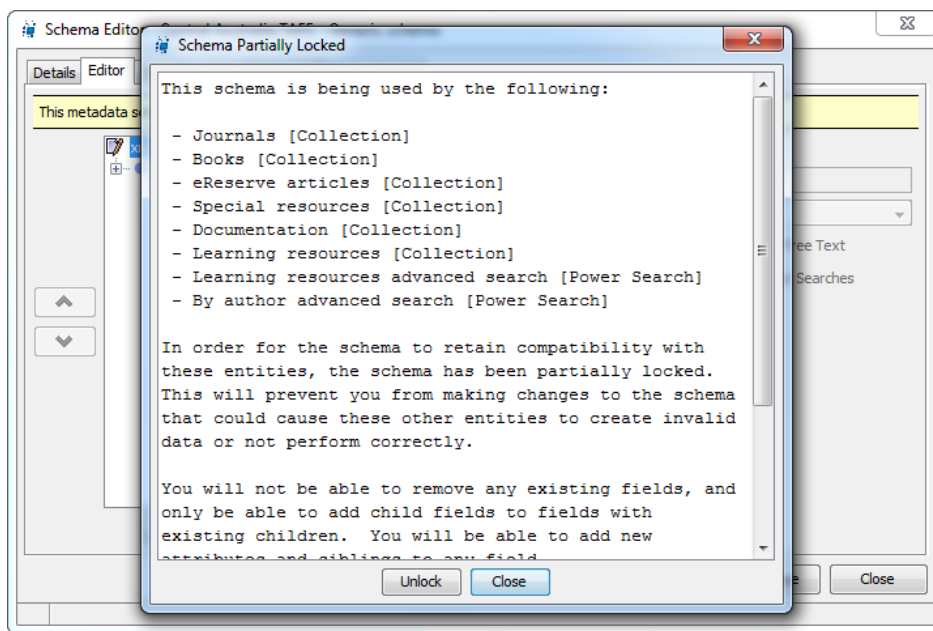


Figure 8 Schema Partially Locked dialog

6. Click . A confirmation dialog is displayed.
7. Click .

To configure the schema

1. Click the + button beside the **item** node to open the tree.
2. Select the appropriate node (e.g. *item/lom/technical/format*).
3. Check the **Index for Advanced Searches** checkbox, as shown in Figure 9.

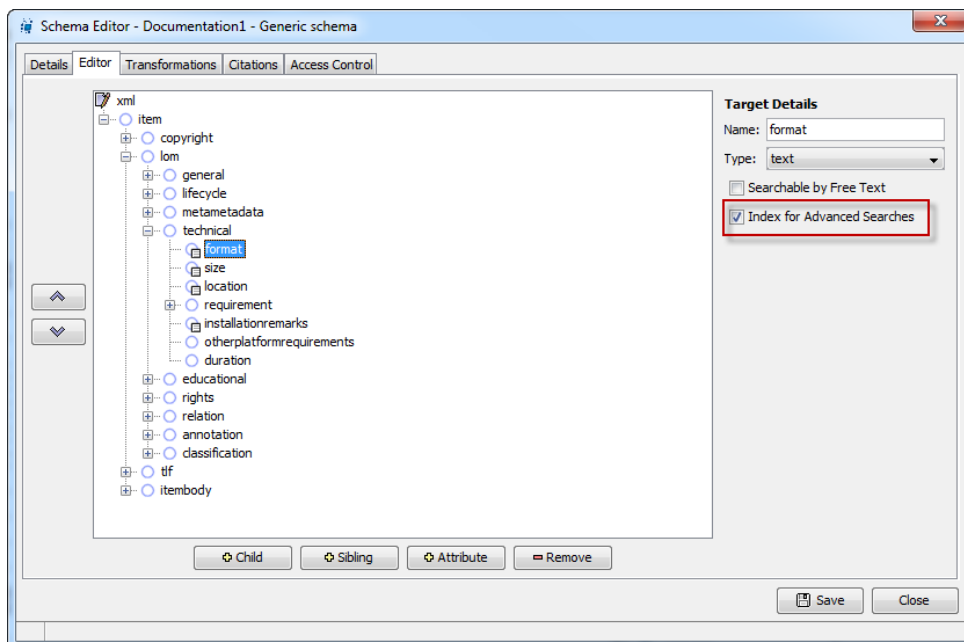




Figure 9 Index for Advanced Searches checkbox

4. Select further nodes for indexing as necessary.

5. Click .
6. Click  to return to the Administration Console.

Create an advanced search

To create a new advanced search

1. Select the **Advanced Searches** option from the Administration Console.
2. Select the **Add** link. The **Advanced Search Editor—Details** tab displays, as shown in Figure 10.

Details tab

The **Details** tab is where the metadata schema and related collections to be associated with the advanced search are selected.

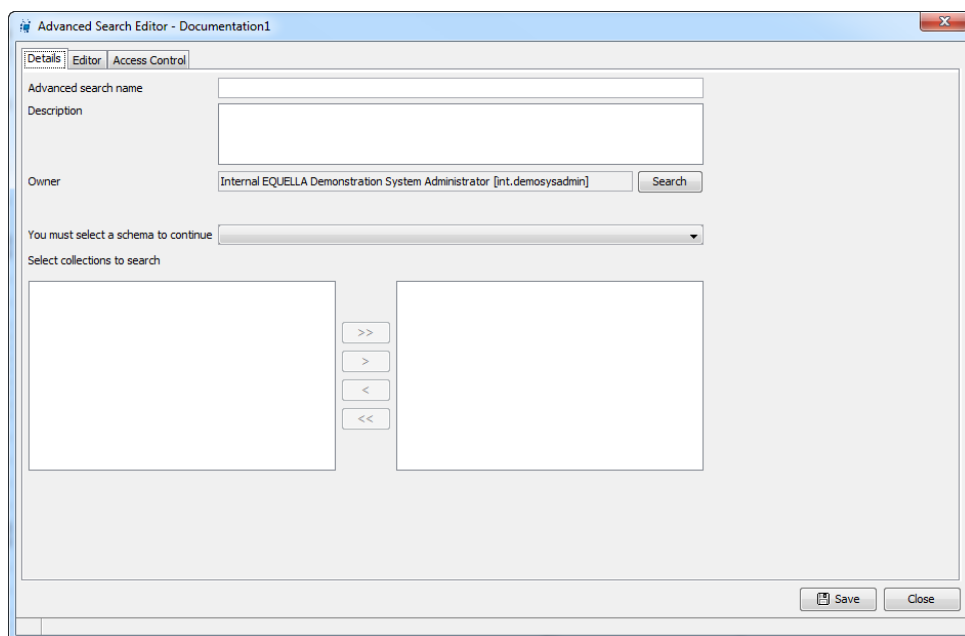


Figure 10 Advanced Search Editor—Details tab

The configurable **Details** page elements are:

- **Advanced Search name** and **description**—enter a meaningful name and description to enable users to easily identify the purpose of the search.
- **Owner**—the owner of the search (by default this is the search's creator).
- **Select metadata schema**—select the schema the search will target.
- **Select collections to search**—select from the displayed collections associated with the chosen schema.

Configure the Details page

1. Enter the name of the search (e.g. *Learning Resources*) in the **Advanced search name** field.

2. Enter a description of the search in the **Description** field, if required.
3. The **Owner** field is set to default to the current user. If required, click the **Search** button to open a **Select Recipients...** dialog to select a different owner.
4. Select a schema (e.g. *Generic Schema*) from the **You must select a schema to continue** drop-down list. All collections that are associated with the selected schema will be displayed in the **Select collections to search** pane. An example is shown in Figure 11.

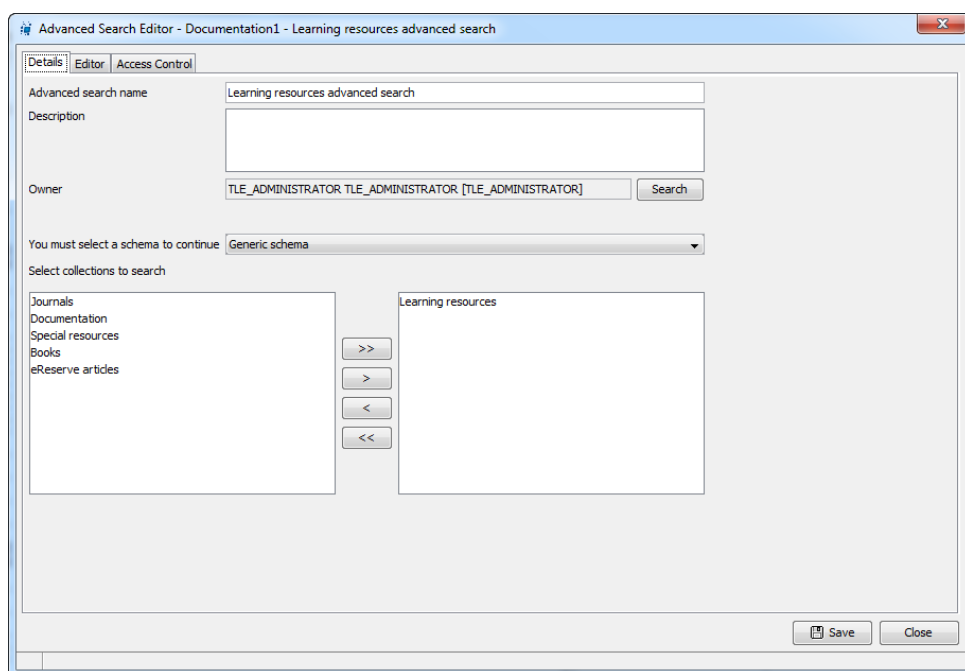




Figure 11 Advanced Search Editor—Details page with schema selected

An advanced search can be limited to search only within particular collections. To select which collections to be searched:

1. Select the required collection and click the  button to move it to the right-hand pane, or
2. Click the  button to select all collections for searching. All collections are moved to the right-hand pane as shown in Figure 12.

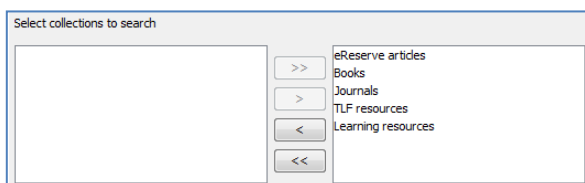




Figure 12 Selected collections displayed in right-hand pane

3. Move unwanted collections back to the left-hand pane by clicking the  or  buttons.
4. Select the **Editor** tab to display the Editor page, as shown in Figure 13.

Editor tab

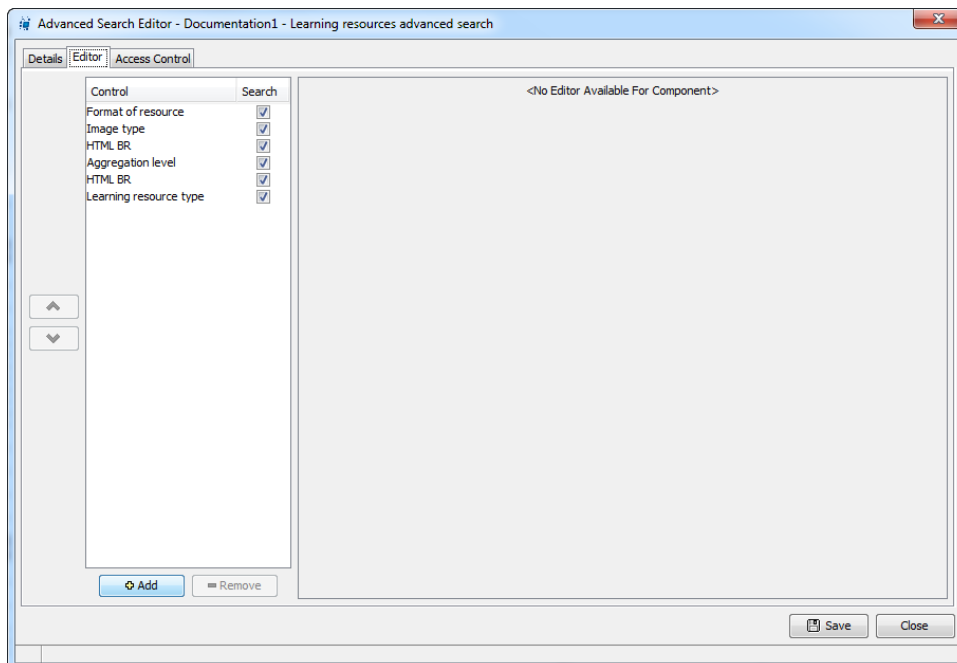


Figure 13 Advanced Search Editor—Editor tab

An advanced search can be regarded as a simplified wizard. Unlike wizards, advanced searches display only one page and use a restricted set of controls. The **Editor** page displays controls in the **Control list** pane located on the left-hand side of the page. Each control targets a node from the metadata schema. The targeted nodes are searched using the criteria entered or selected by the user.

The **Editor** page contains the following elements:



Control list pane

The **Control list** pane is located on the left-hand side of the page. This pane displays the controls that are shown to users of the advanced search. Select a control to display its details in the **Control Editor** pane on the right-hand side of the page.

Control Editor pane

The **Control Editor** pane is located on the right-hand side of the page. This pane displays the details of the selected control. Its appearance will differ for each control.

Navigation arrows

The buttons to the left of the control list pane allow the user to change the order the controls appear in the advanced search. The up arrow  moves the selected control upwards on the page, and the down arrow  moves it downwards.

Add button

 opens the **Select a control...** dialog, as displayed in Figure 14.

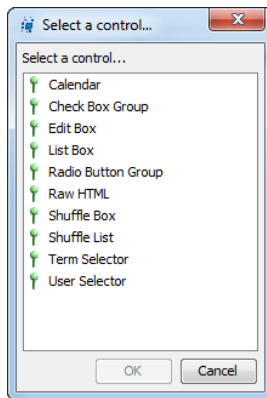


Figure 14 Select a control... dialog

A brief explanation of the available controls is provided below:

- **Calendar**—allows searching by date.
- **Check Box Group**—displays a check box group from which one or more elements can be selected.
- **Edit Box**—allows for the entry of basic keywords.
- **List Box**—features drop-down options to select from.
- **Radio Button Group**—displays a group of options from which only one can be selected.
- **Raw HTML**—allows the entry of HTML code.
- **Shuffle Box**—allows for the selection of one or more items by moving them from one pane to another using arrow buttons.
- **Shuffle List**—allows the entry of any number of elements to a list.
- **Term Selector**—allows for the selection of pre-existing terms.
- **User Selector**—allows for the search and selection of EQUELLA users.


Each control must target a specific metadata schema node.

More information on the purpose and configuration of these controls is provided in *EQUELLA Wizard Controls Reference Guide*.

Remove button

 **Remove**—click to delete the selected control from the advanced search.


Save button

 **Save**—click to save the current advanced search.

Close button

 **Close**—click to close the advanced search editor.

Configure the Editor page

1. Click  **Add** to display the **Select a control...** dialog.
2. Select an appropriate control (e.g. *Check Box Group*).

3. Click . The dialog will close and the selected control is displayed in the left-hand pane of the editor, as shown in Figure 15.

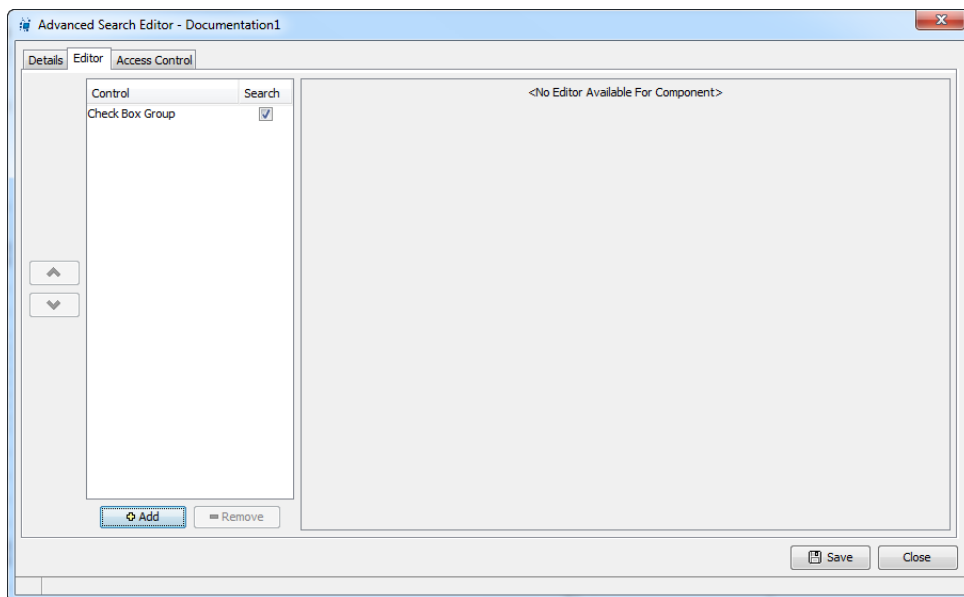


Figure 15 Advanced Search Editor—control added

The **Search** checkbox controls whether the search control is functional to the user. If unchecked, the user may select a value but it will have no impact on the search results.

4. Select the control. The control configuration pane is displayed on the right-hand side, as shown in Figure 16.

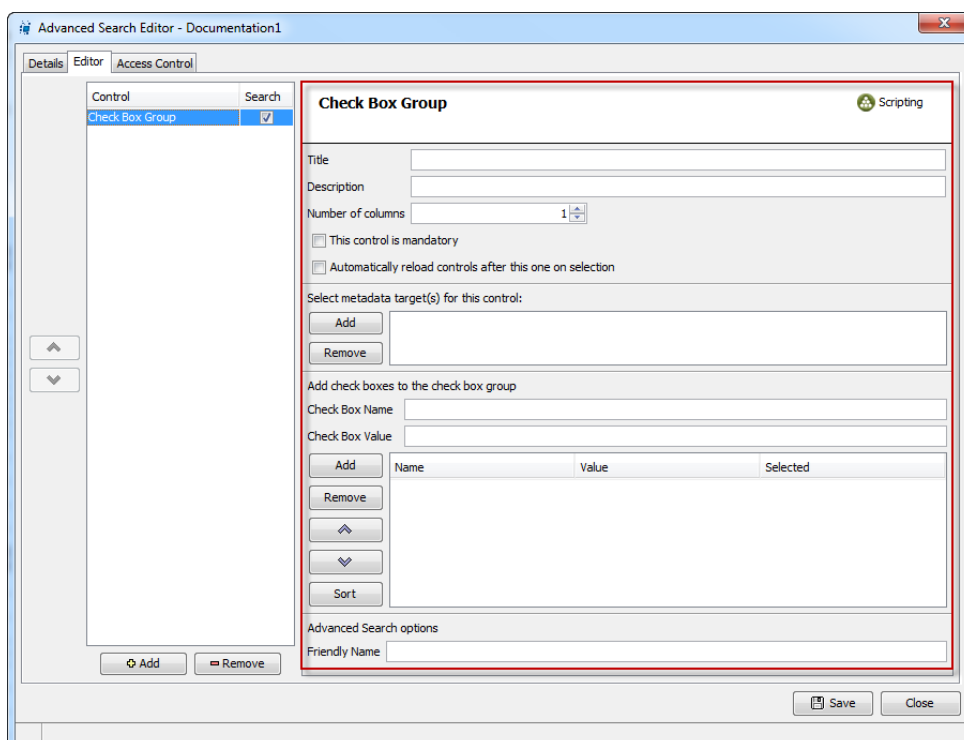


Figure 16 Advanced Search Editor—control configuration pane

5. Configure the selected control as required. Add a **Friendly Name**, if required. (See [Friendly name](#) on page 17 for more information.)
6. Add further controls as necessary. An example of the completed Learning resources advanced search is shown in Figure 17.

Advanced Search Editor - Documentation1 - Learning resources advanced search

Details Editor Access Control

Control Search

Format of resource ☒

Image type ☒

HTML BR ☒

Aggregation level ☒

HTML BR ☒

Learning resource type ☒

Check Box Group

Scripting

Title: Format of resource

Description:

Number of columns: 3

☐ This control is mandatory

☒ Automatically reload controls after this one on selection

Select metadata target(s) for this control:

Add: /item/om/technical/format

Remove:

Add check boxes to the check box group

Check Box Name:

Check Box Value:

Name	Value	Selected
Audio	audio	<input type="checkbox"/>
Video	video	<input type="checkbox"/>
Image	image	<input type="checkbox"/>
Document	document	<input type="checkbox"/>
Other	other	<input type="checkbox"/>

Sort

Advanced Search options

Friendly Name:

Add Remove

Save Close

Figure 17 Advanced Search Editor—example control configuration

An example of the user view of the Learning resources advanced search criteria page is shown in Figure 18.

The screenshot displays the EQUELLA Learning resources advanced search criteria page. The interface includes a sidebar with navigation options such as Dashboard, Favourites, My resources, Search, and Contribute. The main content area is divided into sections for search criteria: 'Format of resource' with checkboxes for Audio, Video, Image, Document, and Other; 'Aggregation level' with four levels ranging from raw media data to a full course; and 'Learning resource type' with a grid of checkboxes for various resource formats like Diagram, Exam, Exercise, Figure, Graph, Index, Lab demonstration, Lecture, Narrative text, Problem statement, Questionnaire, Self assessment, Simulation, Slide, and Table. A 'Filter' panel on the right allows users to filter by owner (with a 'SELECT USER' button) and by date modified (with a date picker). The top right corner shows the user 'INT.DEMOSYSADMIN' with links for PROFILE and LOG OUT, and a 'Search' bar.

Figure 18 Learning resources advanced search criteria page

See the *EQUELLA Searching User Guide* for more information about advanced searching.

Friendly name

Each control in the advanced search editor page except Raw HTML and User selector has a **Friendly Name** field at the bottom of the control editor page. An example is shown in Figure 19.

Advanced Search Editor - Documentation1 - Learning resources advanced search

Control Editor Access Control

Control Search

Format of resource ☒

Image type ☒

HTML BR ☒

Aggregation level ☒

HTML BR ☒

Learning resource type ☒

Check Box Group

Title: Format of resource

Description:

Number of columns: 3

☐ This control is mandatory

☒ Automatically reload controls after this one on selection

Select metadata target(s) for this control:

Add: /item/lom/technical/format

Remove:

Add check boxes to the check box group

Check Box Name:

Check Box Value:

Name	Value	Selected
Audio	audio	<input type="checkbox"/>
Video	video	<input type="checkbox"/>
Image	image	<input type="checkbox"/>
Document	document	<input type="checkbox"/>
Other	other	<input type="checkbox"/>

Advanced Search options

Friendly Name: Resource Type

Add Remove Save Close

Figure 19 Friendly Name field

The name entered in this field displays on the results page once the advanced search has been activated, instead of the xml schema path. The text entered in this field for a control displays when an element from that control is selected on the search criteria page.

Using the example where the Friendly Name 'Resource type' has been entered, shown in Figure 19, if the Format of resource 'Image' checkbox is selected from the search criteria page, the search box displays 'Resource type is Image'. An example of the results page without a friendly name is shown in Figure 20 and an example with the friendly name is shown in Figure 21.

Search: SEARCH

Within: Learning resources advanced search

Where: /item/lom/technical/format is image [Edit query](#) [clear](#)

Search results Showing 1 to 2 of 2 results

Sample content - The Overland Track

Sample EQUELLA content: Photos, video and web sites about the Overland Track between Cradle Mountain and Lake St Clair in Tasmania.

Status: Live | Last updated: 14 days ago

☆☆☆☆ 0 comments | [Add to favourites](#)

Sample content - Walls of Jerusalem

Sample EQUELLA content: Photos from the Walls of Jerusalem in Tasmania

HELP SCREEN OPTIONS

[Add search to favourites](#)

[Share search query](#)

[Search other repositories](#)

Sort

Filter

Filter by owner

SELECT USER

Filter by date modified

After

Figure 20 Advanced search results page with xml path (no Friendly Name)

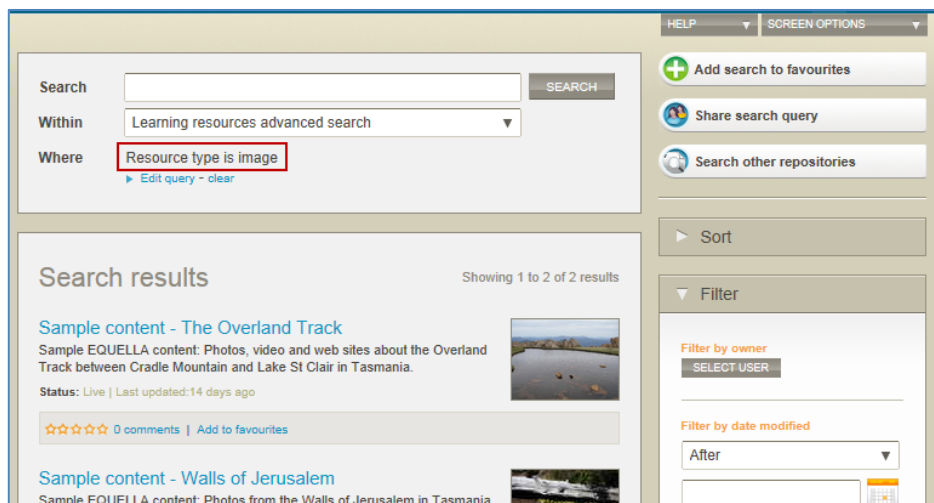


Figure 21 Advanced search results page with 'Friendly Name'

Access Control tab

The **Access Control** tab allows the administrator to configure user access to the selected search. There are three privileges that can be granted: **delete this advanced search**, **edit this advanced search**, and **search for items with this advanced search**.

The following is an example of how to configure the Access Control page. Any user or group can be assigned as owners of a search. This example grants privileges to the system administrator and viewer roles.

To configure this page to restrict access to the system administrator

1. Select the **Access Control** tab. The **Access Control** page is displayed, as shown in Figure 22.

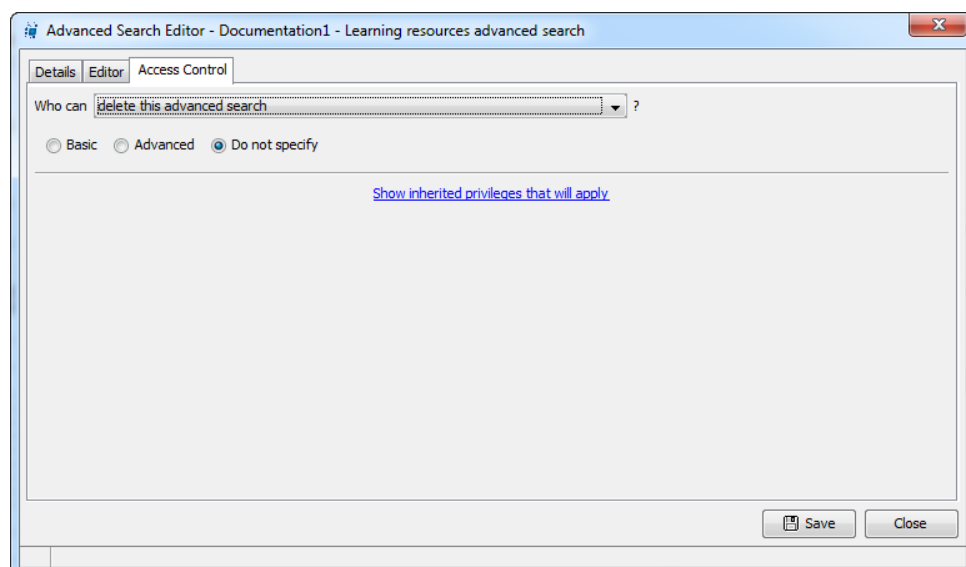


Figure 22 Advanced Search Editor—Access Control tab

2. Click the **Who can?** drop-down arrow and select the **delete this advanced search** option.

3. Select the **Advanced** option. The Advanced screen displays, as shown in Figure 23.

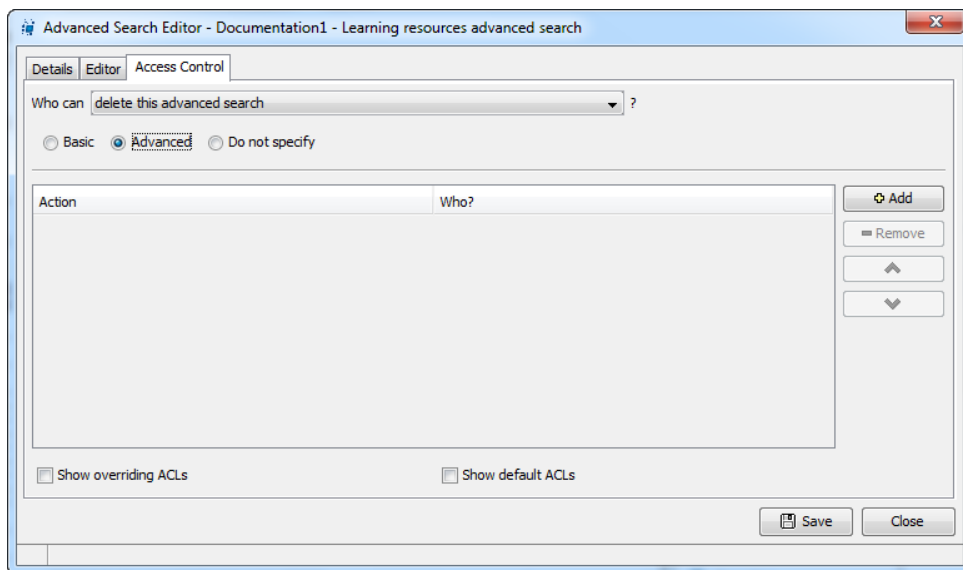



Figure 23 Access Control—Advanced page

4. Click .
5. In the **Action** field, make sure **Grant** displays. If displaying **Revoke**, click on the field and change to **Grant**.
6. In the **Who?** field, click on **Everyone**. The **Select Recipients...** dialog displays, as shown in Figure 24. This dialog allows a search for users, groups or roles to grant access to.

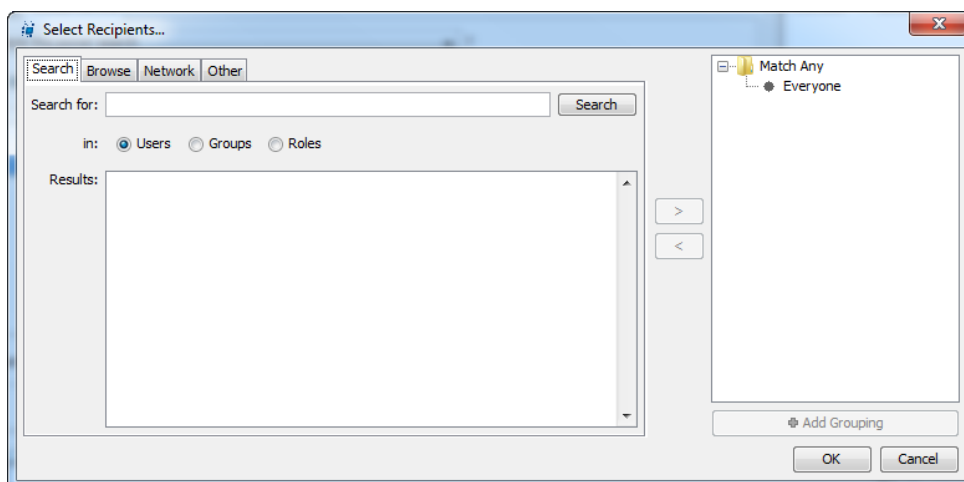






Figure 24 Select Recipients... dialog

7. Select the **Roles** radio button.
8. Click  to display a list of available roles to choose from. Alternatively, type the first letter or letters of a search item and click the .
9. Select **Everyone** in the right-hand pane and use the  button to move it to the left-hand pane.

10. Highlight **System Administrator Role** in the left-hand pane and move to the right-hand pane using the  button, as shown in Figure 25.

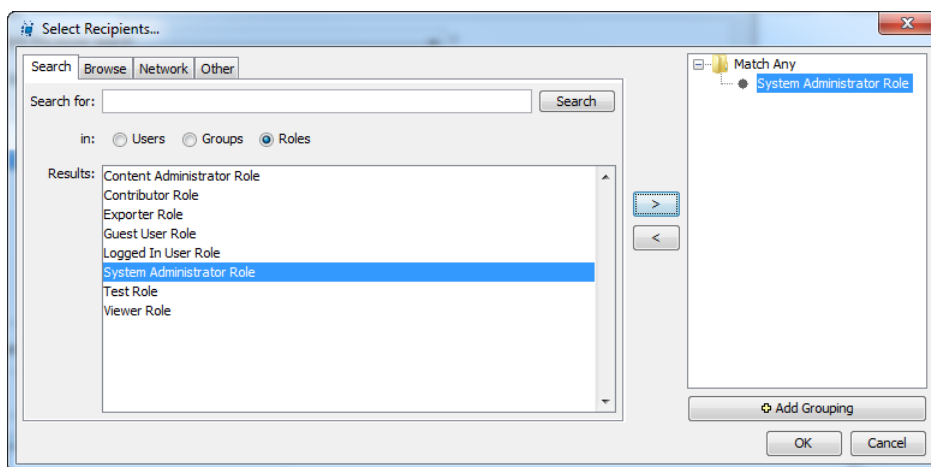


Figure 25 Selected role added

11. Click  to close the dialog.

The delete privilege has now been granted to the system administrator, as shown in Figure 26.

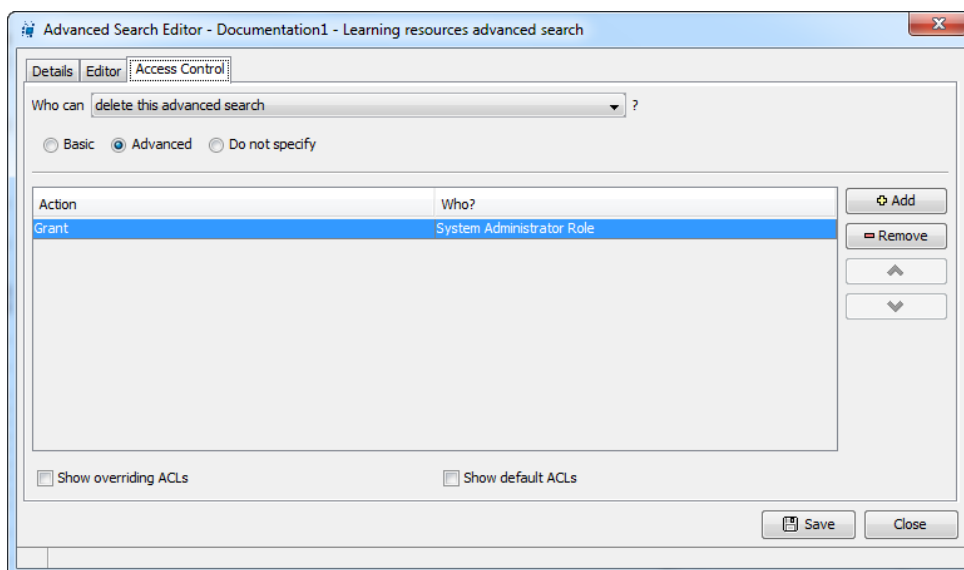


Figure 26 Completed access control configuration

12. Select **edit this advanced search** from the **Who can?** drop-down list and configure access to the option by repeating steps 3 to 11.



To configure this tab to restrict access to the **Viewer** role

1. Select **search for items with this advanced search** from the **Who can?** drop-down list and **Grant** the **Viewer Role** access to this option by repeating steps 3 to 11.

Further security options can be added or deleted using the **Add** or **Remove** buttons. More information on managing privileges is available in *EQUELLA Security Guide*.

Save a search

When all elements have been configured for a search:

1. Click  to save the search details.
2. Click  to close 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://support.equella.com/>.