

EQUELLA®

Dynamic Collections Guide

Version 6.0

Document History

Document No.	Reviewed		Finalised		Published	
1	30/10/2012		31/10/2012		31/10/2012	

October 2012 edition.

Information in this document may change without notice. EQUELLA[®] and its accompanying documentation are furnished under a non-disclosure, evaluation agreement or licence agreement. Copying, storing, transmitting, or otherwise reproducing the software or this document in any form without written permission from Pearson is strictly forbidden.

All products, other than EQUELLA[®], named in this document are the property of their respective owners.

Property of:

Pearson
Level 1, 11 Elizabeth Street
Hobart, Australia, 7000

Copyright © 2012 Pearson

Contact documentation@equella.com for matters relating to documentation.

Table of Contents

Dynamic Collections	4
Dynamic Collections tool	4
Configure a dynamic collection	4
Details page	8
Item Filtering	9
Dynamic Filtering	12
Access Control	13
Using a dynamic collection	16
Searching	16
OAI-PMH Set	18
Harvester Collection	19
Contact Client Support	20

Dynamic Collections

EQUELLA provides an OAI-PMH endpoint to allow its metadata to be harvested by third-party services. This functionality maps each available EQUELLA Collection to an OAI Set.

The use of dynamic collections provides more flexibility, allowing OAI Sets to be mapped to more than one collection, or to certain items within a collection. As these collections are dynamic by nature, then the number of defined OAI Sets can change depending on what content is contained within EQUELLA at the time.

The purpose of this guide is to provide system administrators with an understanding of the EQUELLA Dynamic Collections tool to enable successful management of dynamic collections.

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.

Dynamic Collections tool

Dynamic collections allow for custom collections to be created from resources existing in the EQUELLA repository, or from a manually-entered list as configurable in the Dynamic Collection Editor. These collections can then be used within EQUELLA in a number of ways. The dynamic collections are mapped to OAI Sets, which allows for discovery via an OAI-PMH endpoint (available in EQUELLA), but they can also be used for harvesting, searching and Store catalogue purposes.

Configure a dynamic collection

Dynamic collections are created and modified using the **Dynamic Collections** tool, available in the **Administration Console**.

To access EQUELLA and open the Administration Console

1. Open a browser and enter your EQUELLA URL (e.g. *'http://equella.myinstitution.edu/institution'*).
2. Log in to EQUELLA as an administrator (with sufficient privileges to see the Dynamic Collections tool). Select **Settings** then **Administration Console**, as shown in Figure 1.

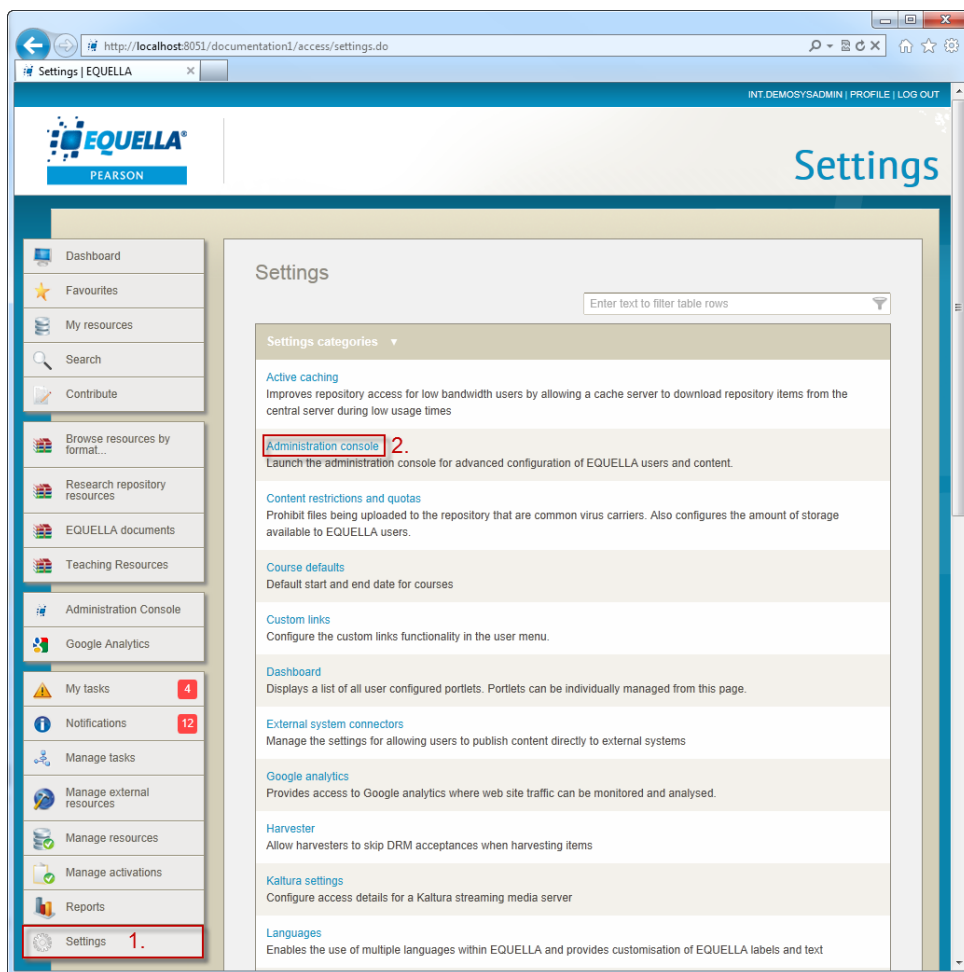


Figure 1 Settings page—Administration Console

3. The **Administration Console** displays. Select the **Dynamic Collections** option to display the **Dynamic Collections** pane. An example is shown in Figure 2.

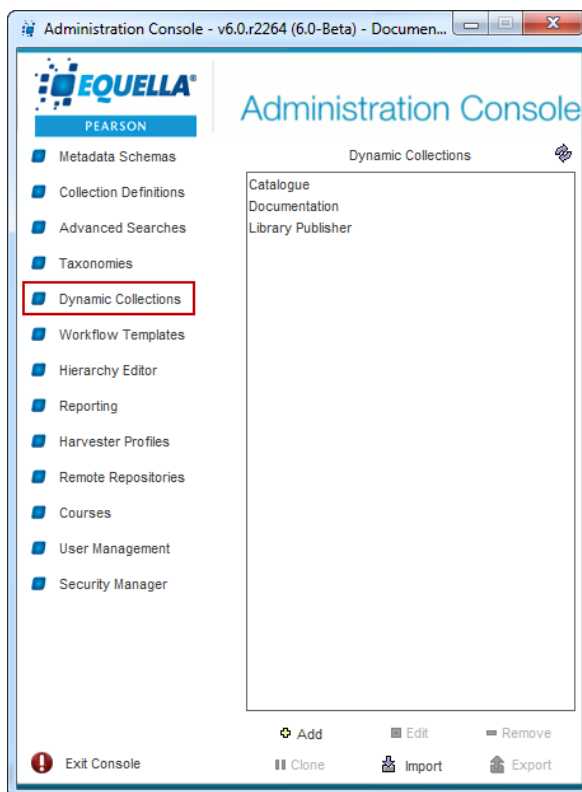


Figure 2 Administration Console—Dynamic collections

The Dynamic collections pane displays, showing a list of all previously configured dynamic collections.


Administration Console elements

When a tool has been selected the **Add**, **Edit**, **Remove**, **Clone**, **Import** and **Export** buttons are visible (providing the correct privileges have been granted; refer to the *EQUELLA Security Administration Guide* for further information), although not all may be enabled. For instance, when no entity of the given type currently exists, only the Add and Import buttons are enabled.

Add

Select  **Add** to display the **Dynamic Collections Editor** and create a new collection.

Edit

Select a collection click  **Edit** (or double-click a collection name) to display the **Dynamic Collections Editor** and modify the selected collection.

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

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

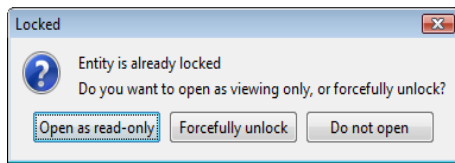




Figure 3 Locked entity dialog


Remove

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

Clone

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

Import

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

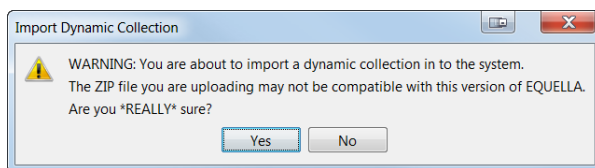




Figure 4 Import Dynamic Collection warning dialog

Export

Select a collection, then click  **Export** to export the selected collection as a ZIP file.

Add a dynamic collection

To add a dynamic collection

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

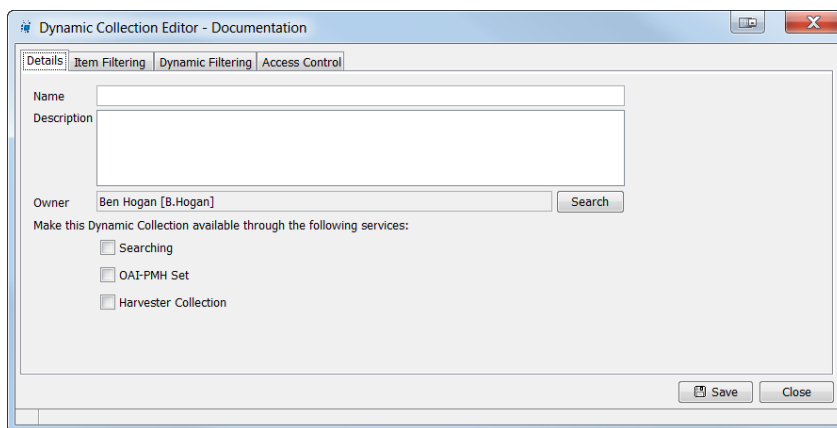


Figure 5 Dynamic Collections Editor—Details page

2. The only mandatory field in the **Dynamic Collections Editor** is the **Name**. At this point it is possible to simply provide a name and click the **Save** button to create a valid **Dynamic Collection**. Further configuration options are outlined below.

The **Dynamic Collection Editor** provides an interface for collection creation with the following pages:

- **Details**—set general information for the creation of the dynamic collection.
- **Resource Filtering**—perform freetext queries on items matching particular metadata schemas and collections.
- **Dynamic Filtering**—configure creation of virtual OAI Sets from dynamic content.
- **Access Control**—define privileges for access to the selected dynamic collection.

Each tab is described in the following sections.

Details page

The general details of a dynamic collection are configured on the **Details** page.

Details page elements include:

- **Name**—enter the display name of the dynamic collection.
- **Description**—enter a description of the dynamic collection.
- **Owner**—assign an owner of the dynamic collection. Defaults to the current logged-in user.
- **Make this Dynamic Collection available through the following services**—check the box(es) to make the dynamic collection available in the following situations:
 - **Searching**—allow resources in this collection to be discoverable from Search pages.
 - **OAI-PMH Set**—allow resources to be returned as virtual sets with an OAI-PMH endpoint.
 - **Harvester Collection**—allow resources in this collection to be harvested.

See [Using a dynamic collection](#) on page 16 for more information on these services.

NOTE: Dynamic collections are always available for the purpose of building catalogues, using the EQUELLA Content Exchange Store function. See the EQUELLA Store User Guide for further information.

An example **Details** page is displayed in Figure 6.

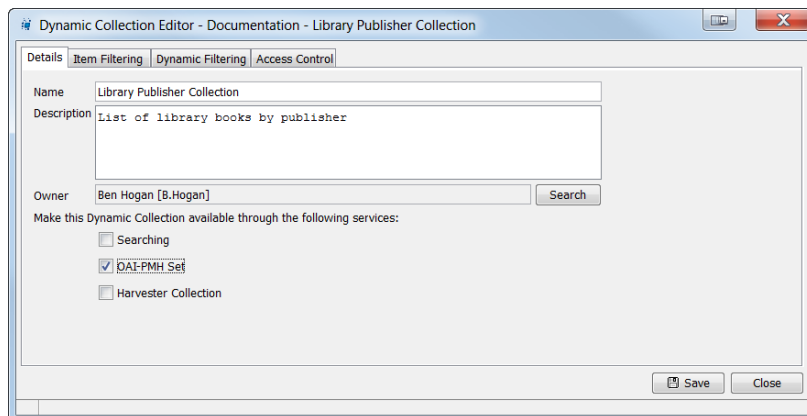


Figure 6 Example Details page

Item Filtering



Filter resources returned in the dynamic collection with a freetext query, or by restricting results to match a schema or collection.

Resource Filtering page elements include:

- **Perform the following freetext query**—enter a search query to filter results to those matching this query.
- **Search the following schemas**—filter the results to those using the selected schema. Scripting options are also available, and explained in the [Create a script for greater control](#) section on page 9.
- **Search the following collections**—filter the results to match those from the selected collection. Scripting options are available, and explained in the [Create a script for greater control](#) section on page 9.

Create a script for greater control

When filtering resources to match those used by a specific collection or schema, it is possible to add a script to create a more defined filter.

1. On the **Resource Filtering** page, click the  button to add either a schema or a collection for filtering.
2. Select an entity from the resulting dialog, and click . This will add the entity to the list of entities to search. An example is shown in Figure 7.

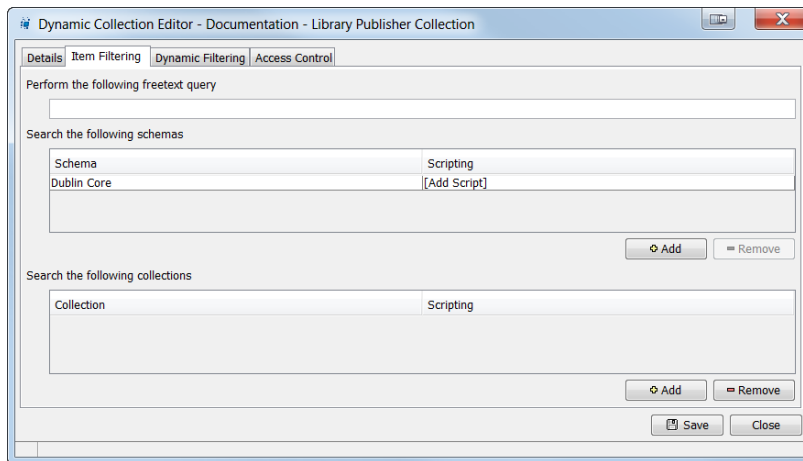


Figure 7 Item Filtering for schema

- Click the **[Add Script]** link, under the **Scripting** heading, to open the **Script Editor**. An example is shown in Figure 8.

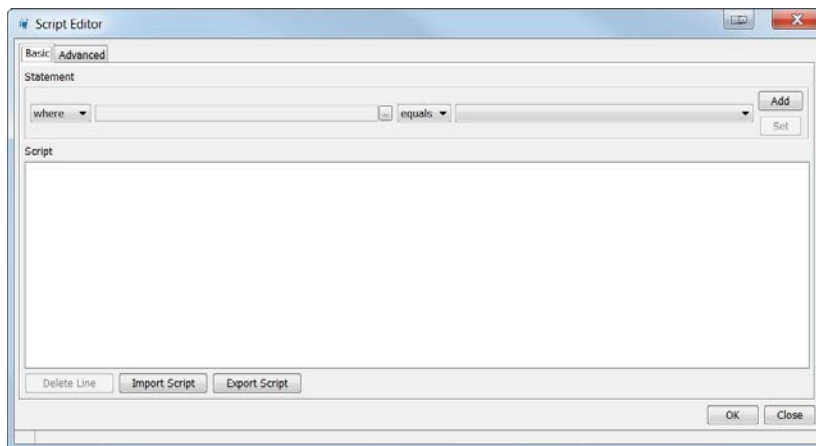




Figure 8 Script Editor

- On the **Basic** page, click the  button to reveal the selection dialog.
- Select the entity from which you wish to search, and click . An example is shown in Figure 9.

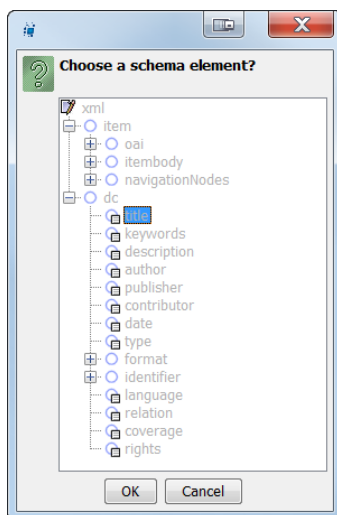


Figure 9 Script Editor—Selection dialog

6. The XPath is now populated in the **WHERE** clause, as shown in Figure 10.

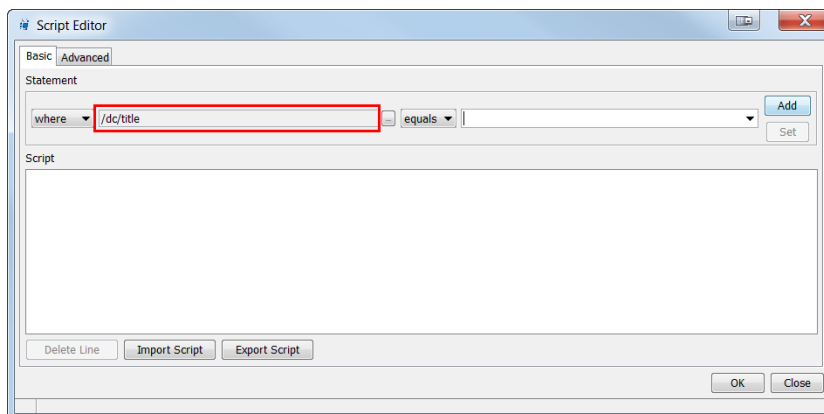


Figure 10 Populated XPath in script editor WHERE clause

7. Select a Boolean operator from the **equals** drop-down menu. Options include: **equals**, **is not**, and **is like**.

8. Enter a query into the text box.

(NOTE: If the selected schema node contains values as options, as would exist for a configured check box or radio button group, this text box will double as a drop-down menu to select the values from.)

9. Click **Add** to commit the script. The script will appear in the **Script** box, as shown in Figure 11.

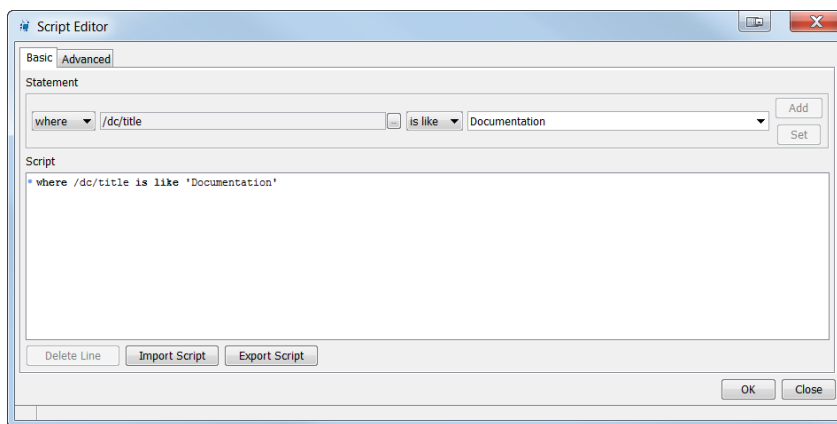


Figure 11 Completed basic script

While more configuration options are available, they are outside the scope of this guide. For further information on scripting in EQUELLA, please refer to the *EQUELLA Scripting Guide (Basic)* and *EQUELLA Scripting Guide (Advanced)*.

10. Click the **Advanced** tab to view the same script in JavaScript. The script pane acts like a text editor for direct input. An example is shown in Figure 12.

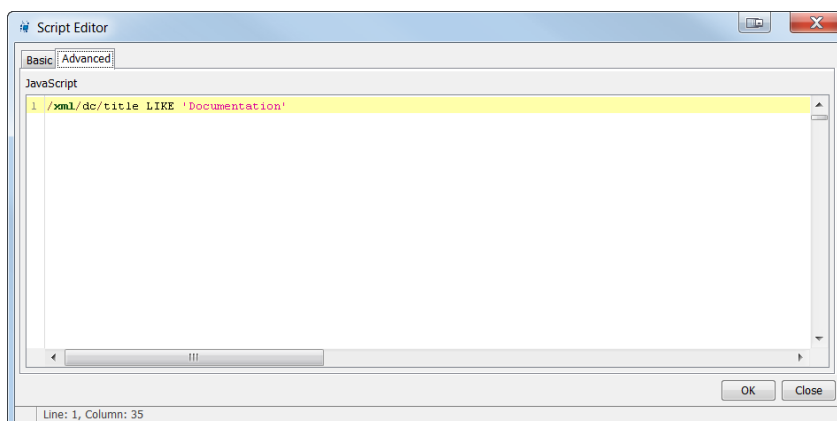


Figure 12 Completed script on Advanced tab

11. Click **OK** to return to the **Dynamic Collection Editor**, where the dynamic collection can be saved, or further configuration made.

Dynamic Filtering

Virtualise the dynamic collection into multiple instances, made available from each entry in a list of values. These values can come from a manually entered list, as defined in the **Editor**, or dynamically from the resources existing in the EQUELLA repository.

Dynamic filtering page elements include:

- **Enable Dynamic Filtering checkbox**—click this to enable the other elements on the page.
- **Select the XPath of the field you wish to match the values against**—click **Select...** to navigate to a schema target to choose as the field which will be used to match values.

- **Choose the source of the values:**
 - **Contributed Resources**—return all resources contributed against the selected XPath.
 - **Manually Entered List**—manually enter a list of resources to be returned.

Configure Dynamic Filtering

1. Select the **Enable Dynamic Filtering** checkbox to enable the configuration options.
2. Click to display the **Choose a Schema Target** dialog.
3. Drop down the **Choose a schema...** menu to reveal a list of available schemas.
4. Select the desired schema from the list. This will populate the xml pane with the tree of schema nodes.
5. Select the desired schema node and click to return to the **Dynamic Collection Editor** with the XPath field populated with the selected schema node. An example is shown in Figure 13.

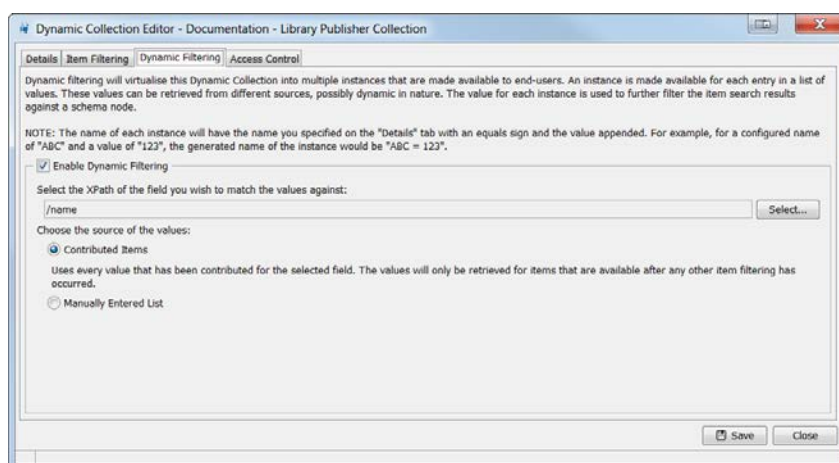


Figure 13 Sample Dynamic Filtering configuration

6. Choose the source of the values by selecting either
 - a. **Contributed Items**—to return all items contributed to the repository matching the given XPath, or
 - b. **Manually Entered List**—to reveal a selector allowing the entry of terms into a list.
7. To manually enter terms, type your entry into the text box and click . Similarly, to remove a previously entered term, select it and click .

Access Control

The **Access Control** page allows a dynamic collection to be restricted to a set of users, groups or roles.

On this page, three privileges can be configured:

- **DELETE_DYNA_COLLECTION**—delete this dynamic collection.
- **EDIT_DYNA_COLLECTION**—edit this dynamic collection.

- **SEARCH_DYNA_COLLECTION**—search this dynamic collection.

Another privilege relevant to Dynamic Collections, which is configured in the Security Manager, not from this page, is:

- **CREATE_DYNA_COLLECTION**—create a dynamic collection.

These privileges are typically granted to Administrators, but anyone who wants to be able to search the dynamic collection for items will need the **SEARCH_DYNA_COLLECTION** granted to them for the given dynamic collection(s).

Further information on managing privileges is available in the *EQUELLA Security Administration Guide*.

To configure a privilege

1. Select the **Access Control** tab to display the **Access Control** page.
2. Click the **Who can?** drop-down menu to reveal the list of available privileges.
3. Select the delete this dynamic collection option.
4. Select the **Advanced** option to display the access control list.

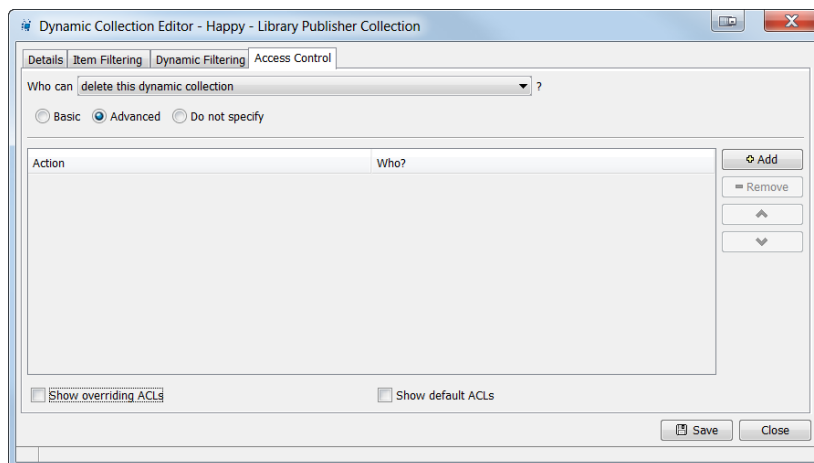


Figure 14 Access Control page

5. Click the **Add** button.
6. In the **Action** field, select either **Grant** or **Revoke** by clicking on the current setting and selecting the appropriate option from the drop-down menu.
7. In the **Who?** field, click **Everyone** to display the **Select Recipients...** dialog. An example is shown in Figure 15.

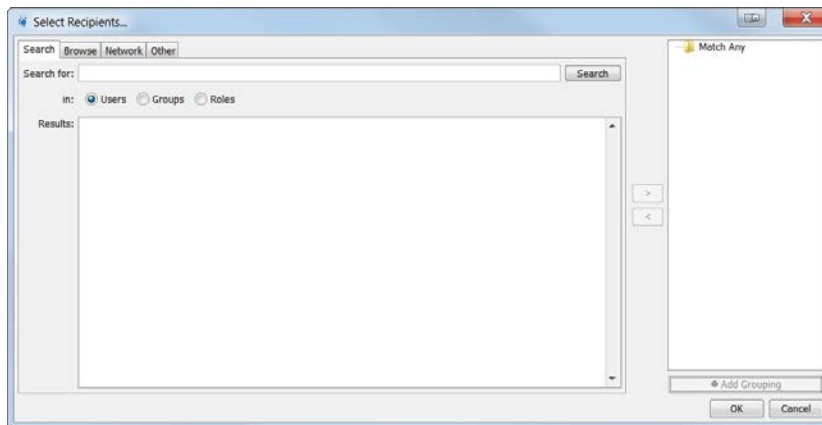


Figure 15 Select Recipients... dialog

8. Select the **Roles** option.
9. Click to display a list of all available roles. Alternatively, type the first letter or letters of search item and click .
10. Select **System Administrator** then select the button to move the role to the right-hand pane, as shown in Figure 16.

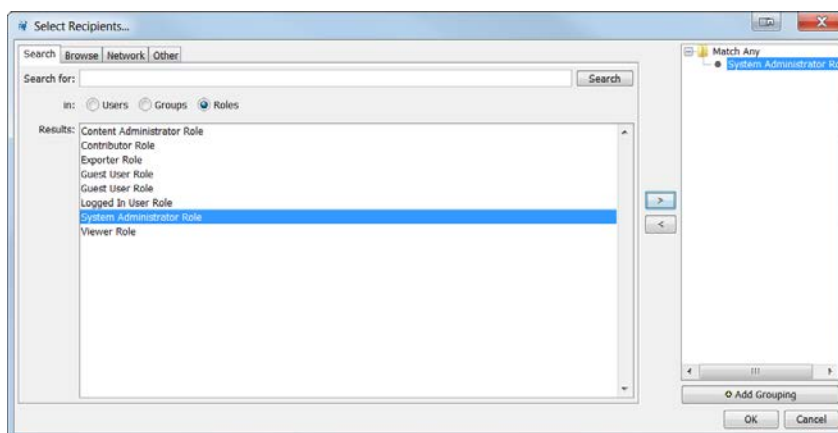


Figure 16 Select Recipients... dialog—Adding a role

11. If required, the newly added role can be removed from the right-hand pane by selecting it, then clicking the button.
12. Click to close the dialog. The delete privilege has now been granted to users in the system administrator role, as shown in Figure 17.

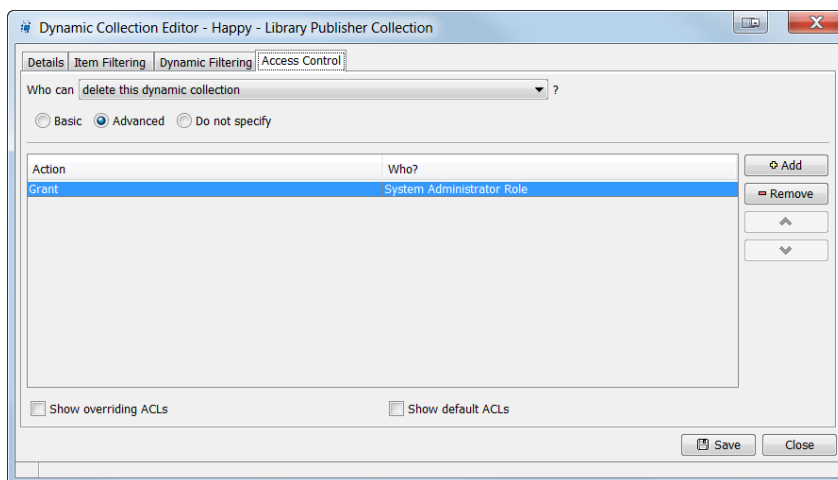



Figure 17 Completed access control configuration


13. Save the dynamic collection to commit your changes.

Further privileges and users can be configured using the above procedure. Alternatively refer to the *EQUELLA Security Guide* for more information on security configuration.

To save a dynamic collection

When all elements have been configured for a collection:

14. Click  Save to save the dynamic collection details.

15. Click  Close to close the Dynamic Collection Editor.

Using a dynamic collection

Dynamic collections can be employed in multiple areas of EQUELLA. This is set on the **Details** page of the **Dynamic Collection Editor**. Under the heading **Make this Dynamic Collection available through the following services:** there are three options: **Searching**, **OAI-PMH Set** and **Harvester Collection**. Clicking the checkboxes will enable the dynamic collection to this section. Any combination of options is allowed.

NOTE: Dynamic collections are always available for the purpose of building catalogues, using the EQUELLA Content Exchange Store function. See the EQUELLA Store User Guide for further information.

These options are explored in the following section.

Searching

Selecting the **Searching** checkbox in the Dynamic Collection Editor will make the dynamic collection available in the **Within** drop down menu on the **Search** page, alongside other collections and advanced searches. An example is shown in Figure 18.

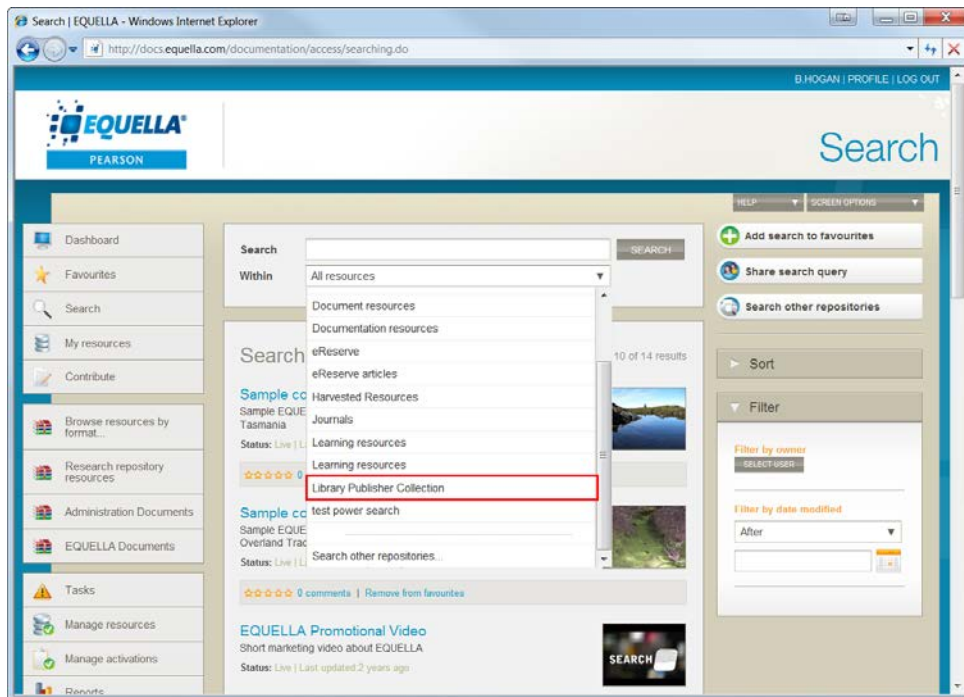


Figure 18 Dynamic collection without Dynamic Filtering as seen from EQUELLA Search page

Selecting the dynamic collection allows the user to view all results within the collection, or perform a search within the collection, to return only those matching the user's query.

When Dynamic Filtering is enabled on the dynamic collection, the **Within** menu is populated with each instance created from the configured list of values. Each instance is listed in the form *Dynamic_collection_name = Instance_name*. An example is shown in Figure 19. Each instance typically represents one value, or item, which will be returned when the instance is selected in the **Within** menu, and it is still possible to search within these results, if desired.

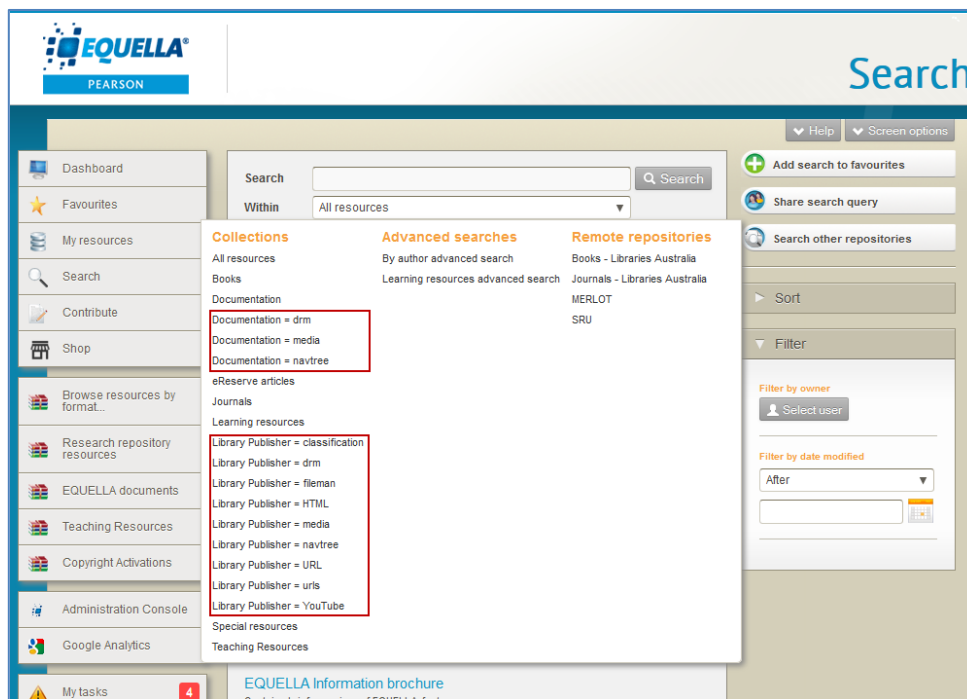


Figure 19 Dynamic collection with Dynamic Filtering as seen from EQUELLA Search page

OAI-PMH Set

Selecting the **OAI-PMH Set** checkbox in the Dynamic Collection Editor will make the dynamic collection discoverable as an 'OAI Set'.

When Dynamic Filtering is enabled on the dynamic collection, each instance created from the configured list of values becomes an OAI Set, discoverable with an OAI-PMH endpoint.

This output can be confirmed by using EQUELLA's built-in OAI functionality. Adding the following onto an institution URL will return the OAI XML:

/p/oai?verb=ListSets to become *http://myinstitution.edu/institution/p/oai?verb=ListSets*

An example output is displayed in Figure 20.

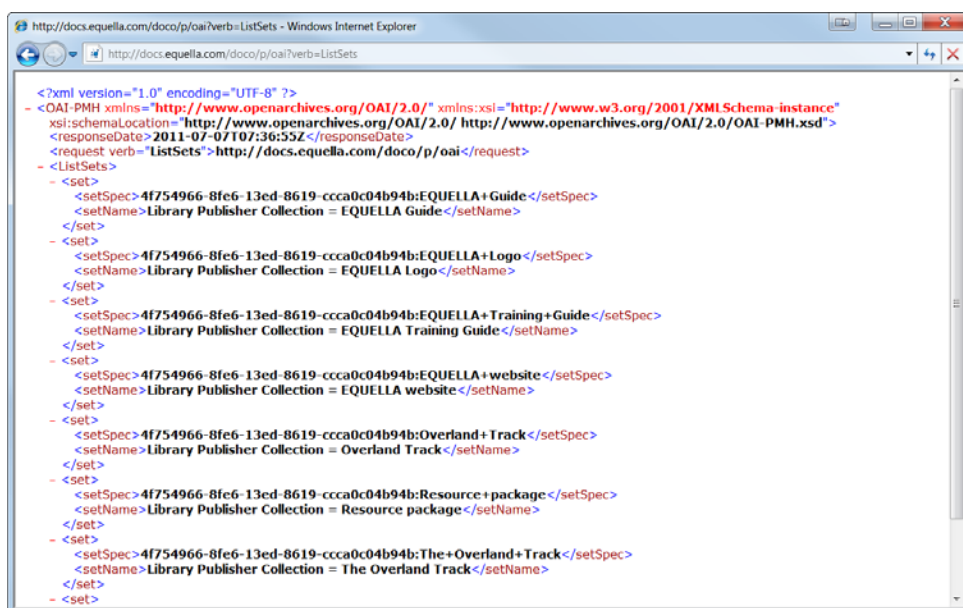


Figure 20 List of dynamically created OAI sets as seen in EQUELLA

Harvester Collection

Selecting the **Harvester Collection** checkbox in the Dynamic Collection Editor will make the available as a harvester collection. This allows items in the collection to be harvested by third-party harvesters, including EQUELLA.

When Dynamic Filtering is not enabled on the dynamic collection, the dynamic collection is listed as a harvestable collection. An example of this is provided in Figure 21, as viewed from an EQUELLA Harvester Profile.

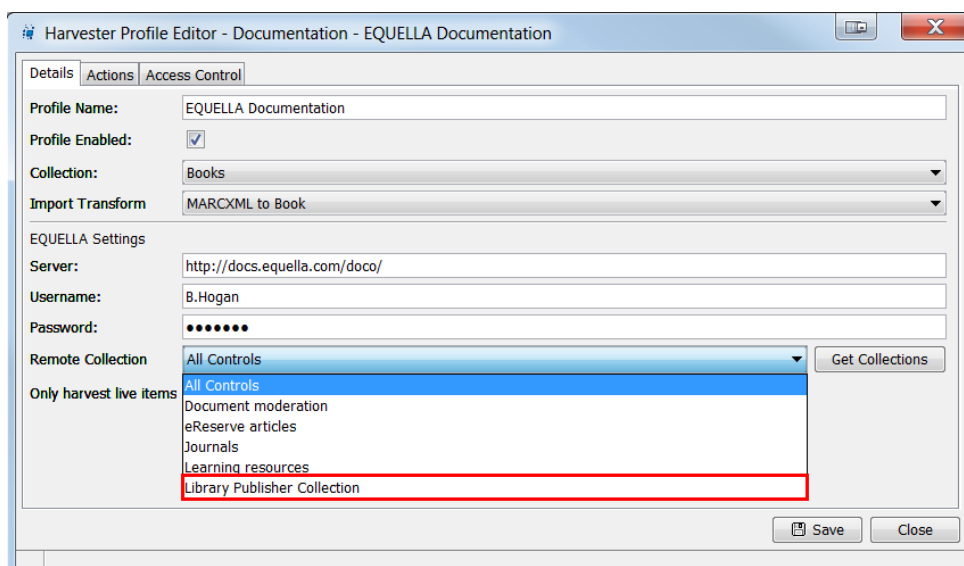


Figure 21 Dynamic collection without Dynamic Filtering as seen from EQUELLA Harvester Profile

When Dynamic Filtering is enabled on the dynamic collection, each instance created from the configured list of values becomes harvestable. An example list of harvestable instances as viewed from an EQUELLA Harvester Profile is shown in Figure 22.

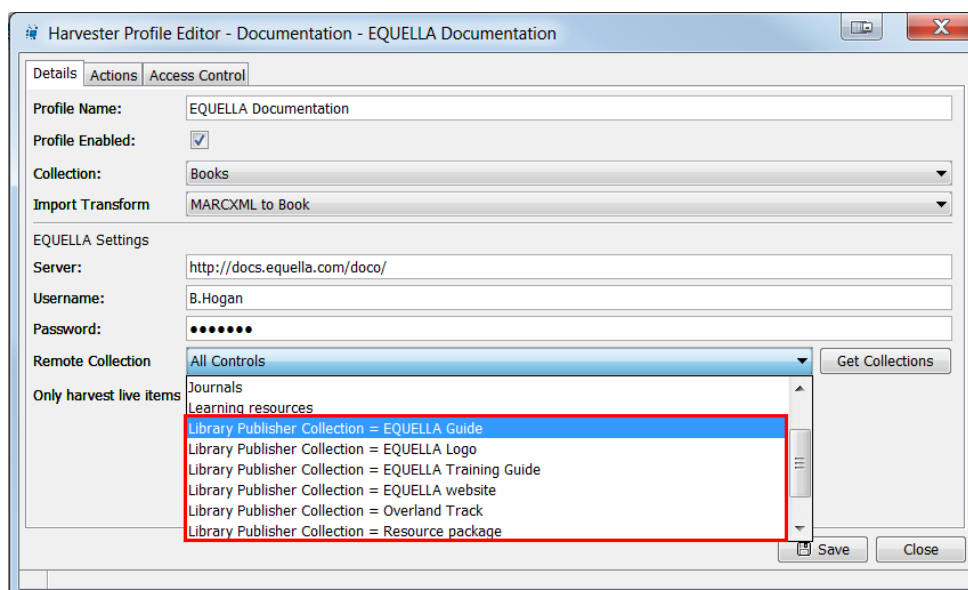


Figure 22 Dynamic collection with Dynamic Filtering as seen from EQUELLA Harvester Profile

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/>.