EQUELLA®

Manage Resources User Guide

Version 6.1

Document History

Document No.	Reviewed		Finalised		Published	
1	10/05/2013		10/05/2013		10/05/2013	

Table of Contents

Manage resources overview

An EQUELLA resource typically comprises metadata (information) and one or more attachments uploaded during contribution. When a resource is displayed, important elements of its metadata are shown along with links to attachments. Modifications to a resource comprise modification of the metadata or the addition or removal of attachments.

Every resource in the EQUELLA repository is assigned an owner, with the owner typically being the resource's creator or contributor. Owners are typically configured with privileges to maintain their own resources, such as the ability to modify drafts, create versions and assign users for sharing ownership. The system administrators are granted more extensive privileges, having access to the **Manage resources** function. This function allows content and system administrators to manage resources, either individually or as bulk operations, regardless of ownership.

The purpose of this guide is to demonstrate to administrators the range of options available for resource management. The *EQUELLA My Resources User Guide* provides information on managing resources for owners.

Please note that this guide has been developed to reflect the full capabilities of EQUELLA and as such may differ in appearance from your own installation.

EQUELLA Digital Repository

To access EQUELLA

1. Open a browser and enter your EQUELLA URL (e.g.*'http://equella.myinstitution.edu'*).
2. Log in to EQUELLA. The EQUELLA Dashboard displays. An example is shown in Figure 1.
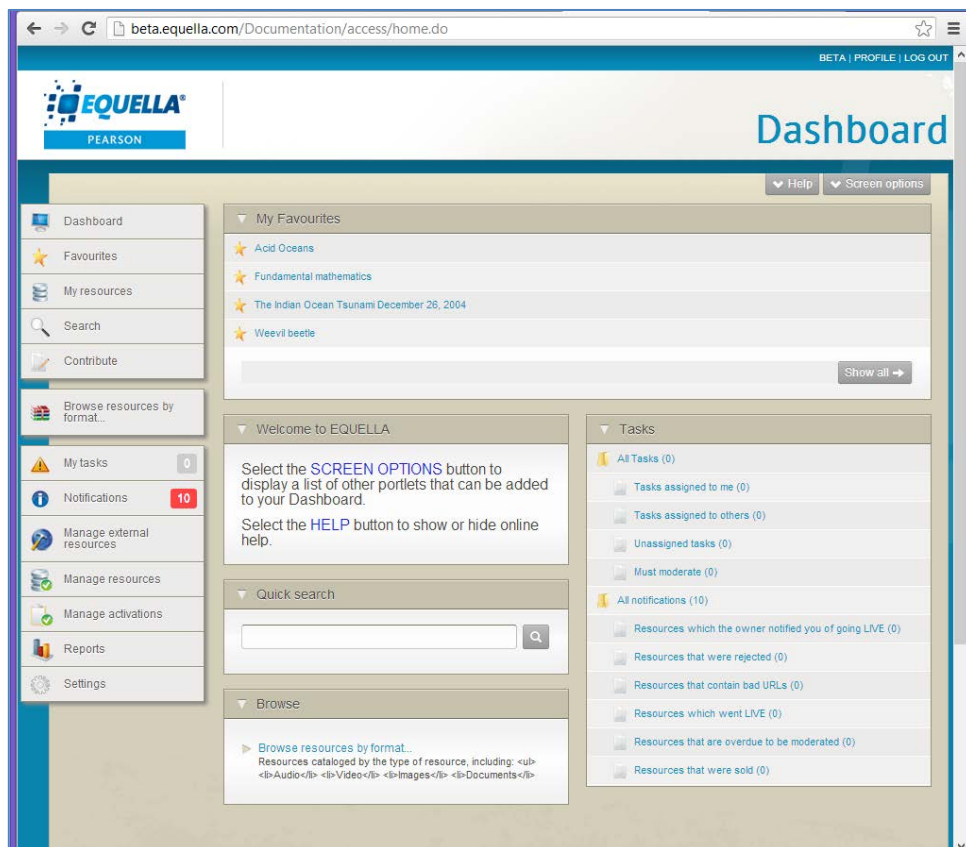
Figure 1 EQUELLA Dashboard page

The EQUELLA Digital Repository allows users to search, create, store, manage, view, and share content.

Manage resources

Suitably-privileged administrators have the ability to access the **Manage resources** function to perform a variety of actions to either an individual resource or a selection of resources in one instance.

To access Manage resources

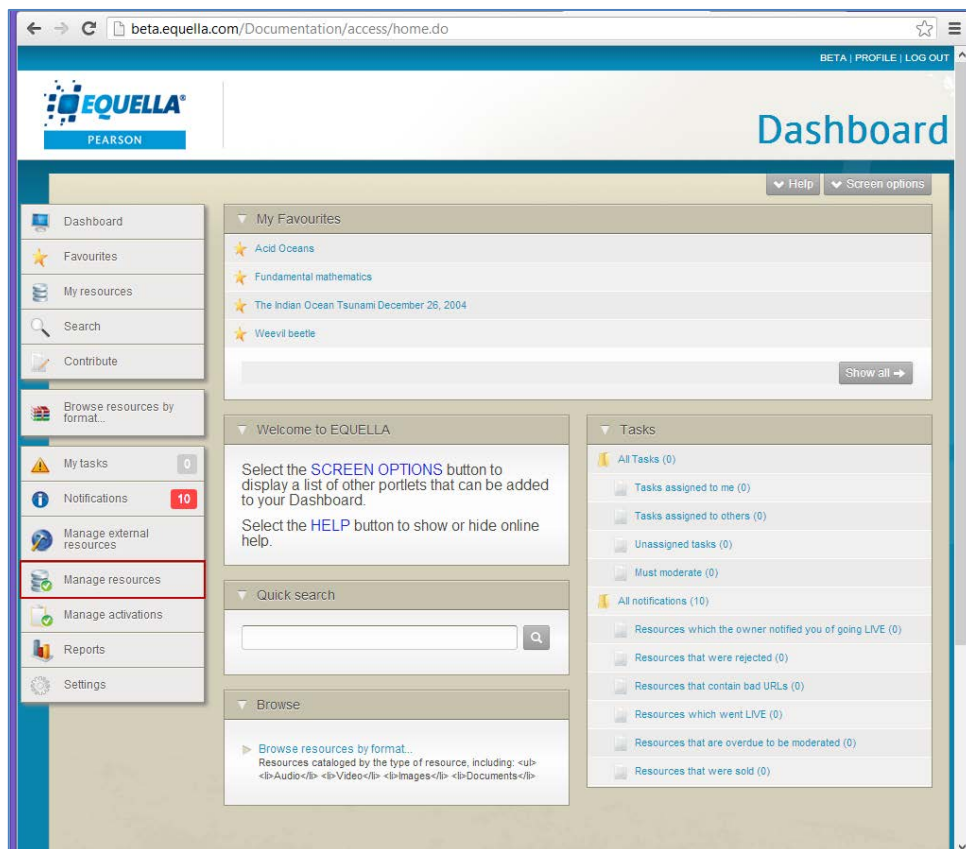1. Select **Manage resources** from the navigation menu, as shown in Figure 2.

Figure 2 Manage resource menu item

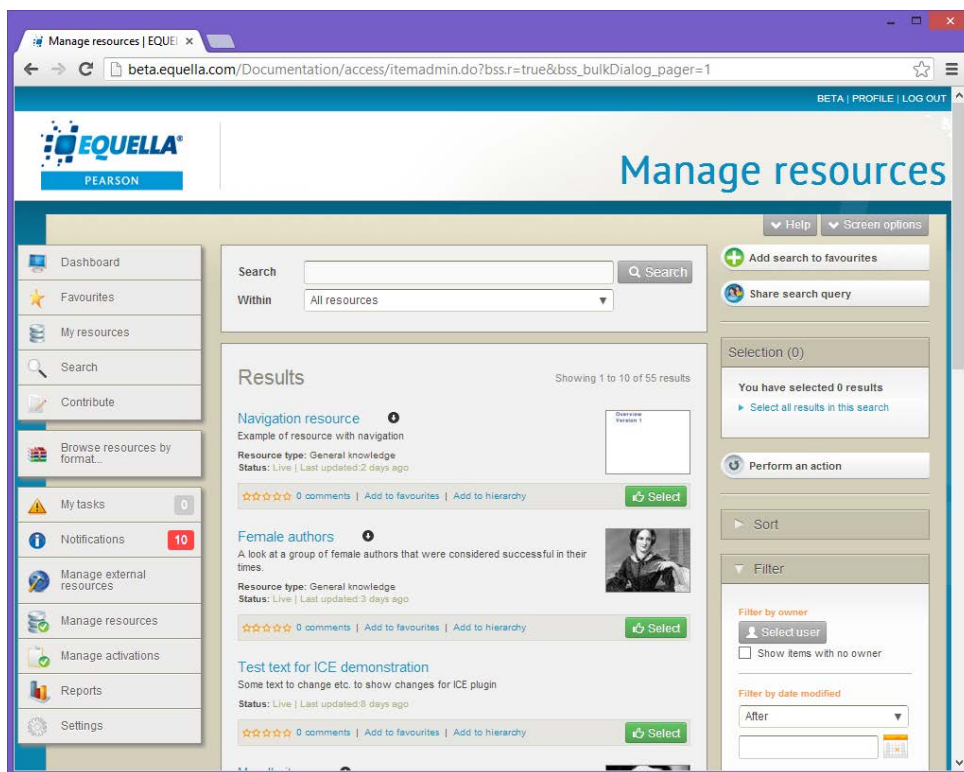The **Manage resources** page displays. An example is shown in Figure 3.

Figure 3 Manage resources page

Manage resources page

The Manage resources page displays resources and provides functionality for viewing, sorting and filtering resources. Additionally, unpublished files and web pages from users' scrapbooks can be displayed on the Manage resources results page. Elements of this page can include:

Search pane

- **Search**—original search terms (e.g. *EQUELLA*) are displayed in the search field with a button. New search terms can be entered, if required.

- **Within**—select a specific collection, My content (scrapbook content) or *All resources*. Further information is provided in the Search options section on page 17.

Search results
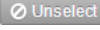
Results can be displayed in groups of 10, 50 or 100 per page, with paging displayed at the end of the search results page. Information displayed for each matching result can include:

- **Title**—select this link to display the resource summary page. Further information is provided in the Resource summary page section on page 20.

- ⬇ - this down arrow icon displays next to the title when a resource has one or more attachments. Clicking the icon displays the attachments in either a structured or thumbnail grid format, depending on the collection's search results template

configuration. (For further information, see the *EQUELLA 6.1 Collection Definitions Guide*).

Click an attachment to open it in the default viewer.

Click the ⊕ icon to close the attachment view.

- **Description**—the description of the resource.
- **Status—**displays the resource status and when it was last updated. Statuses displayed can be *live*, *archived*, *deleted*, *suspended, review, moderating, rejected* or *draft*.
- **Last updated—**the time period passed since the resource was last updated.
- **<x> comments—**select this link to display the resource summary page where comments and ratings can be entered. Further information is provided in the Comments section on page 25.
- **Add to favourites—**select this link to add the resource to the resource favourites list.
- ⊕ Add search to favourites —click this button to add the current search to the search favourites list.
- 👍 Select —click this button to select the resource. The resource is highlighted and the ⊘ Unselect button is displayed. An example is shown in Figure 4.
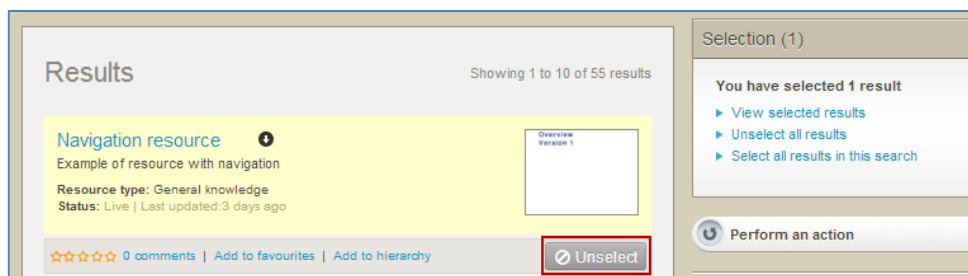

Figure 4 Selected resource

- ✓ Help —click this button to display context-sensitive help at the top of the page. An example is shown in Figure 5. Depending on the context, links to other help topics can also be displayed. Click the button again to hide the help pane.
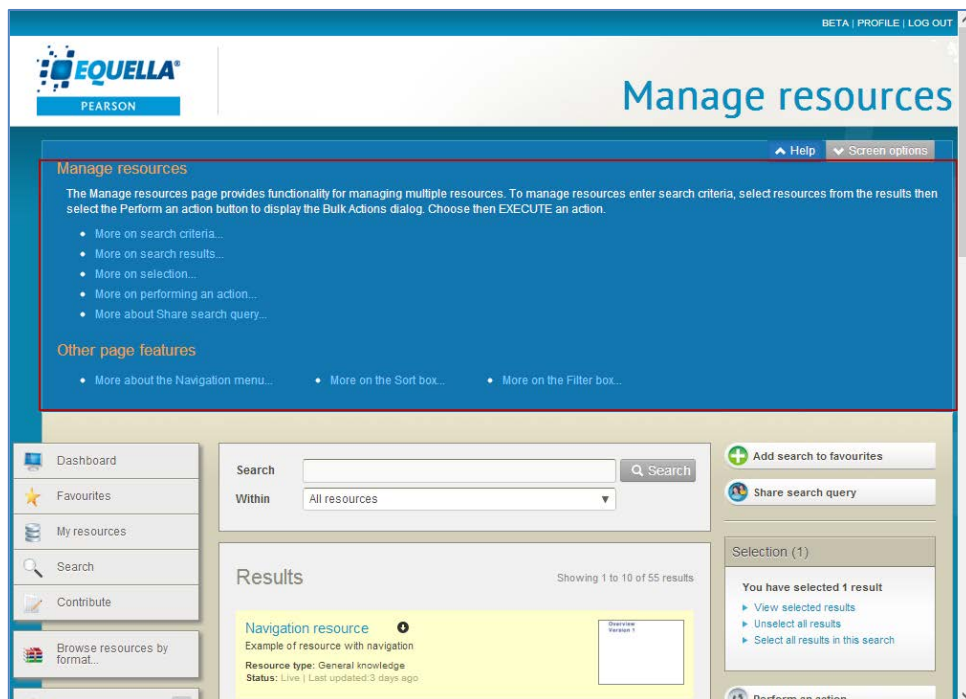
Figure 5 Help example

- **SCREEN OPTIONS** ▼ —click this button to display the screen configuration option:
  - **Number of results per page**—select how many results (10, 50 or 100) are displayed per page from the drop-down list.

Save search to favourites

Search queries can be saved for future use by adding them to the **Favourites** page.

Add search to favourites button

Clicking 🟢 Add search to favourites on the right-hand side of the page displays the **Add search to favourites** dialog where a name is entered to help identify the search. An example is shown in Figure 6.
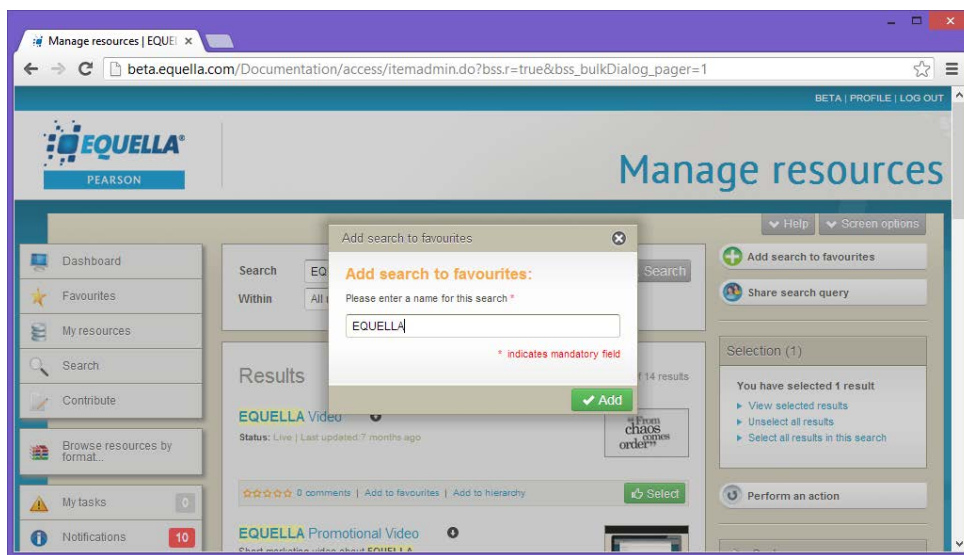
Figure 6 Add search to favourites dialog

Clicking ![Add button] displays a *'Successfully added this search to your favourites'* message and adds the search to your *Favourite searches* list.

Share search query

Search results can be shared with other users by sending them the search results for their use.

Share search query button

Clicking ![Share search query button] on the right-hand side of the page displays the **Share search query** dialog where results can be shared by *RSS or Atom feed*, *via URL* and *via e-mail*. An example is shown in Figure 7.

Figure 7 Share search results dialog

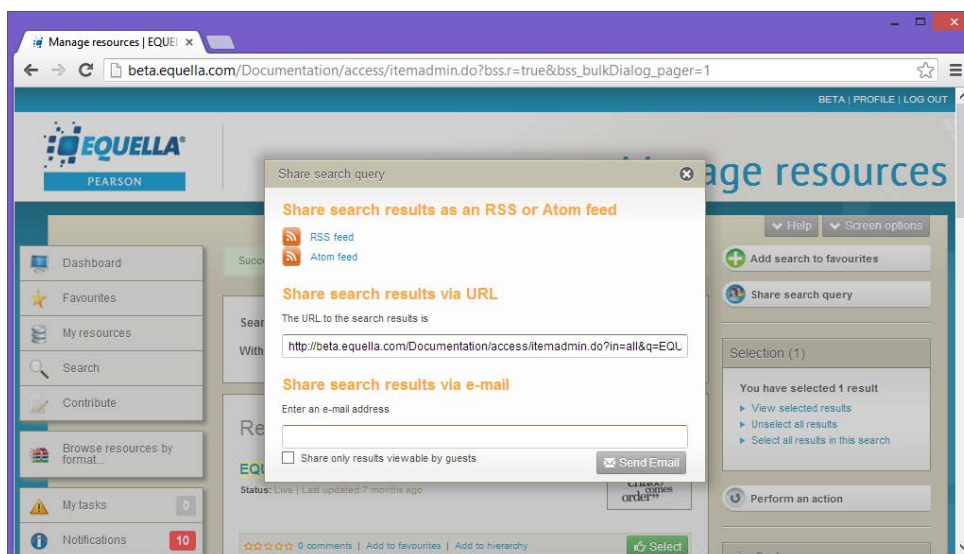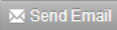- **Share search results as an RSS or Atom feed**—selecting the **RSS feed** or **Atom feed** link will display a subscription page. Subscribed users are notified if resources are updated or added to the search results.

- **Share search results via URL**—users can send a link to the search results page to other users by copying and pasting the URL into an email or other document. The EQUELLA log in page is displayed when the link is clicked. Once logged in, the user is taken directly to the search results page.

- **Share search results via e-mail**—users can send results to others via email. Enter an email address in the field provided and click ![Send Email]. Check the **Share only results viewable by guests** checkbox if sending to users outside your institution.

Selection pane

The **Selection (x)** pane displays the number of resources currently selected. An example is shown in Figure 8.
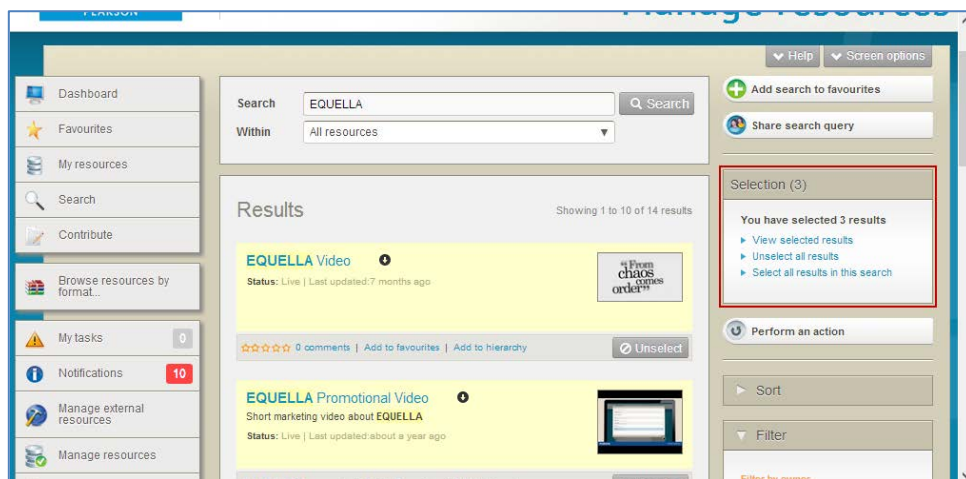

Figure 8 Selection pane

There are three links displayed in the Selection pane:

- **View selected results**—select this link to display a **Bulk actions** page with all currently selected resources listed. An example is shown in Figure 9.
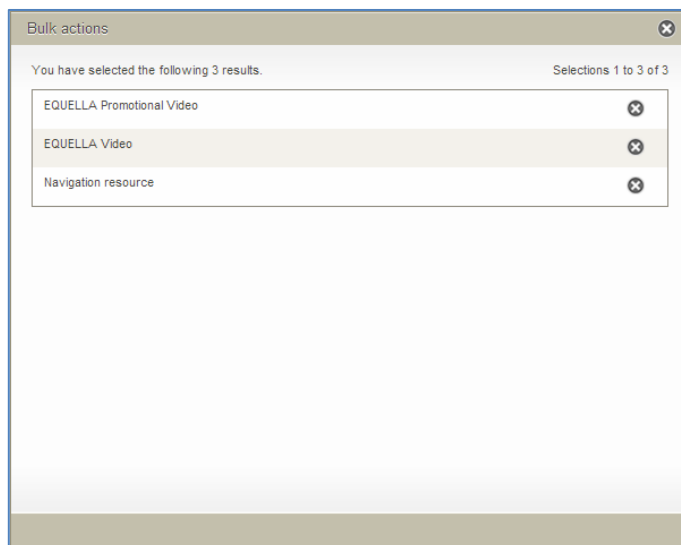
Figure 9 Bulk actions page

Click next to a resource to remove that resource from the list.

Click in the top right corner to return to the results page.

- **Unselect all**—select this link to clear all current selections.
- **Select all results in this search**—select this link to select all the resources returned for the current search.

Perform an action

Click to open the **Bulk actions** page. This allows the same action to be performed to all the currently selected resources at one time. See Bulk actions on page 39 for more information.

Sort results

The **Sort** box provides options for sorting the results list, as shown in Figure 10. Clicking the toggle button shows or hides the box.

Figure 10 Sort box

The **Sort results by** drop-down list can include **Relevance**, **Date last modified**, **Title** or **User rating**. Selecting the **Reverse order of results** checkbox reverses the selected sort order, for example reversing a title ordering from A–Z to Z–A.

Filter results

The **Filter** box (as shown in Figure 11) provides options for reducing the number of displayed results.
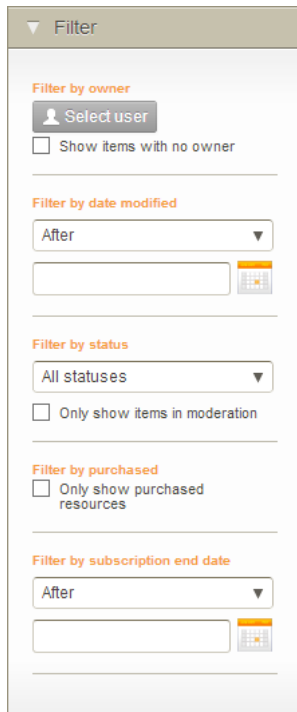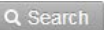

Figure 11 Filter box

The following filters are included:

Filter by owner

Click [Select user] to display the **Select owner to filter by dialog**. Enter search terms and click [Search] to display a list of matching results. An example is shown in Figure 12.
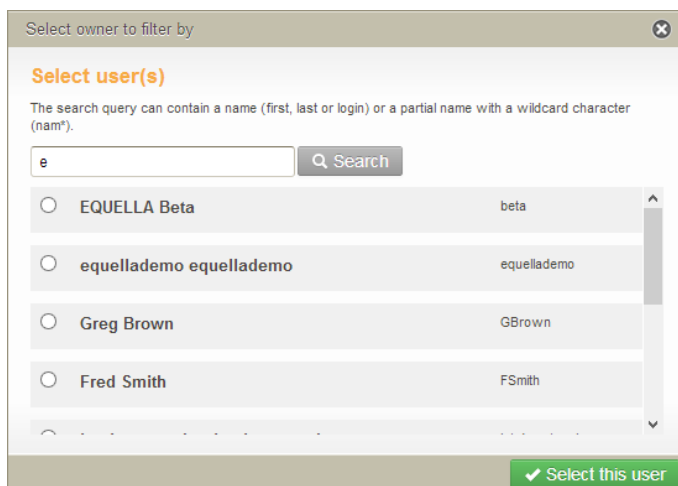

Figure 12 Select owner to filter by dialog

Select a user (e.g. *Internal EQUELLA Demonstration Teacher*) then click ✔ Select this user to filter the results to those owned by the selected user. The selected owner is displayed in the **Filter by owner** pane. An example is shown in Figure 13.
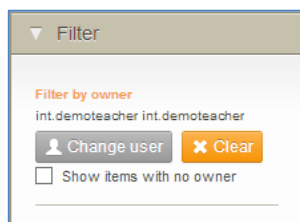
Figure 13 Filter by owner pane

The owner selected can be changed by clicking 👤 Change user , or removed by clicking ✖ Clear .

Filter by date modified

Select a qualifier from the drop-down list (**After**, **Before**, **Between** or **On**), then click the calendar field or icon to display a calendar control, as shown in Figure 14.
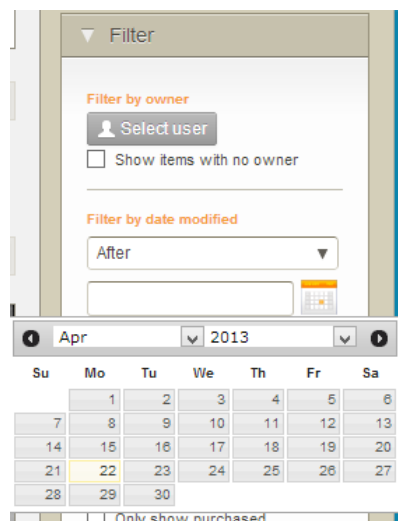
Figure 14 Calendar control

Select the **Clear** link to remove the filtering criteria.

Filter by status

Select a status from the drop-down list. Statuses are *Draft*, *Live*, *Rejected*, *Moderating*, *Archived*, *Suspended*, *Deleted*, *Review* and *Personal* (scrapbook items). An example is shown in Figure 15.

Figure 15 Filter by status

Only resources with the status selected are displayed on the results page.

Only show items in moderation

Check this checkbox to display resources currently in moderation. This includes resources with statuses of Rejected, Moderating and Review. An additional filter, **Filter by workflow** displays once this checkbox is checked, as shown in Figure 16.

Figure 16 Workflow filter

If required, select a workflow from the drop-down list.

Only show purchased items

This filter is relevant for EQUELLA instances set up as EQUELLA Content Exchange Store fronts.

Select this checkbox to show only resources that have been purchased from Store catalogues.

Filter by subscription end date

This filter is relevant for EQUELLA instances set up as EQUELLA Content Exchange Store fronts, where resources have been purchased on a subscription basis.

Select a qualifier from the drop-down list (**After**, **Before**, **Between** or **On**), then click the calendar field or icon to display a calendar control, as shown in Figure 17.
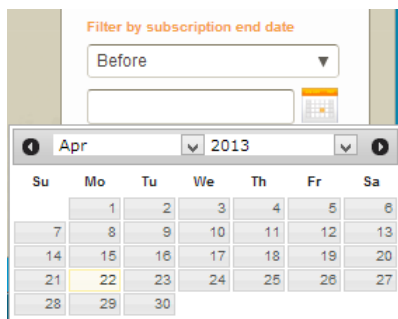

Figure 17 Subscription end date calendar control

Clear filters

An '*X records have been filtered out*' message is displayed when a filter has been applied to search results. An example is shown in Figure 18.
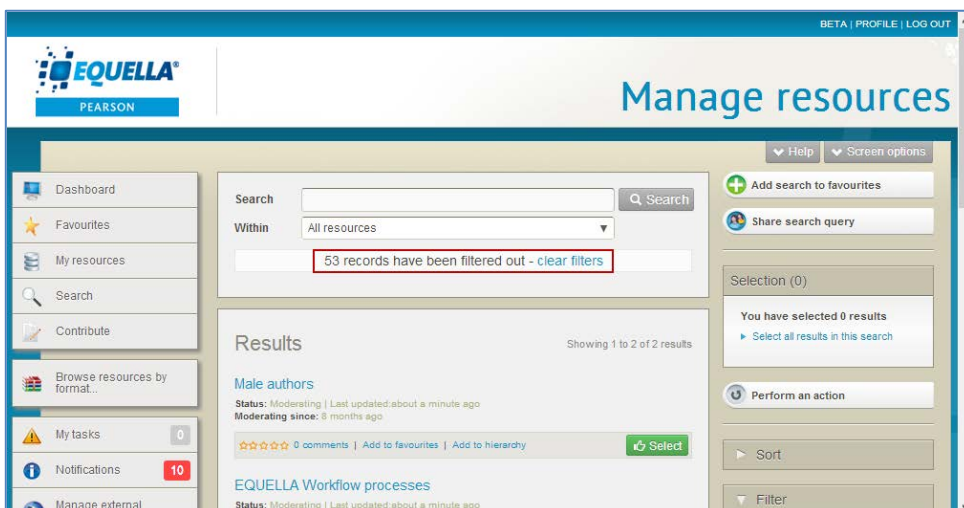
Figure 18 Filter message

Select the **clear filters** link to display all results.

Search options

Searching can be refined by selecting a collection from the **Within** drop-down list in the **Search** box. An example is shown in Figure 19.
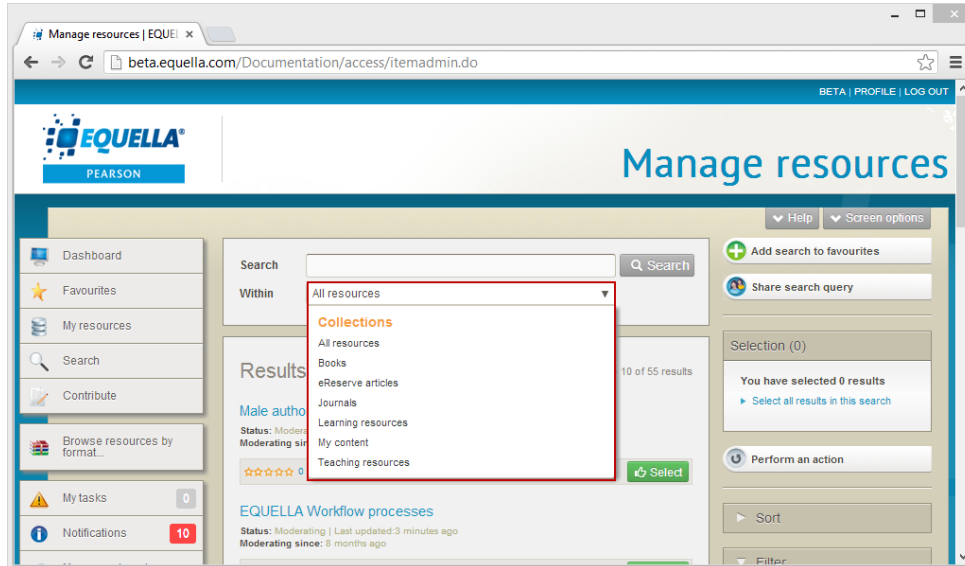
Figure 19 Within drop-down list

Search by collection

Select a collection (e.g. *Learning resources*) to display only matching resources belonging to that collection. If the **Search** field is left blank, all resources belonging to the selected collection are displayed.

Search by My content

Select **My content** from the *Within* dropdown to display webpages and files that have been created or uploaded in users' scrapbooks. See My contenton page 5617 for further information.

Advanced search

An advanced search provides a means of searching specifically within the metadata (information) associated with a resource. Pre-configured Advanced Searches are not available for selection from the Manage resources Within dropdown, but once a collections has been selected, a link to an Advanced search page is displayed. An example is shown in Figure 20.
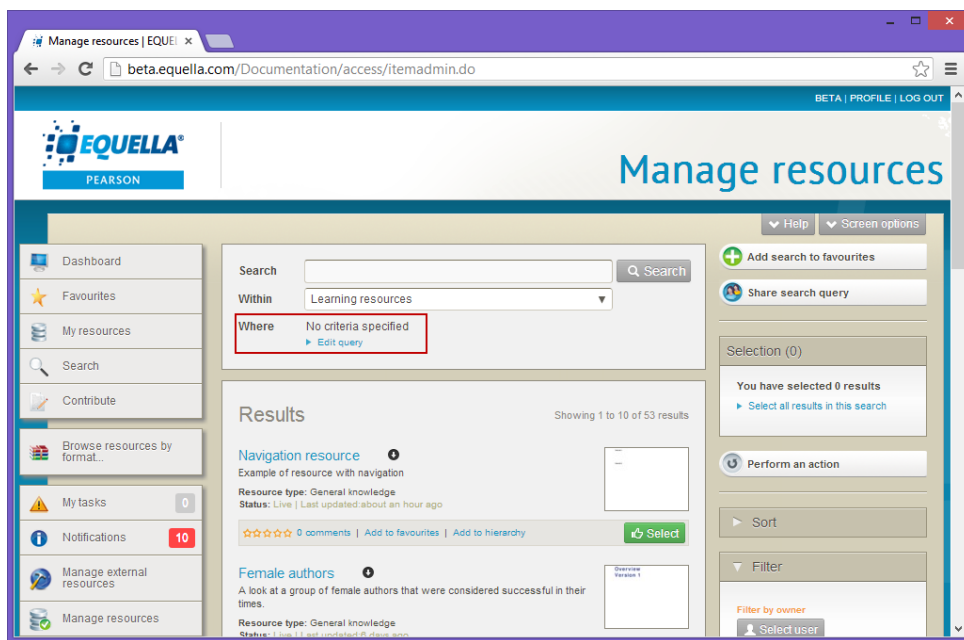
Figure 20 Advanced search link

To conduct an advanced search

1. Select a collection (e.g. *Learning resources*) from the **Within** drop-down list. Resources belonging to the selected collection displays, and an additional **Where** section is added to the **Search** pane. An example is shown in Figure 21.
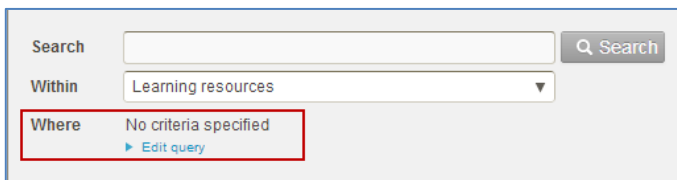
Figure 21 Advanced search link

2. Select the **Edit query** link to display the **Add search criteria** page. An example is shown in Figure 22.
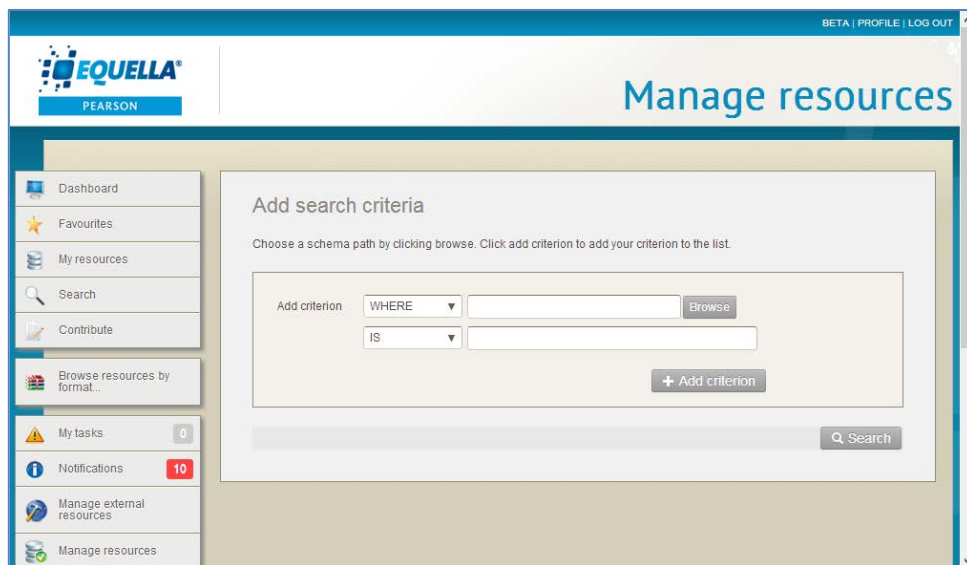
Figure 22 Advanced Search criteria

3. Select the required criteria
   (e.g. WHERE */xml/item/lom/educational/learningresourcetype* IS Tutorial) then click
   [+ Add criterion]. An example is shown in Figure 23.
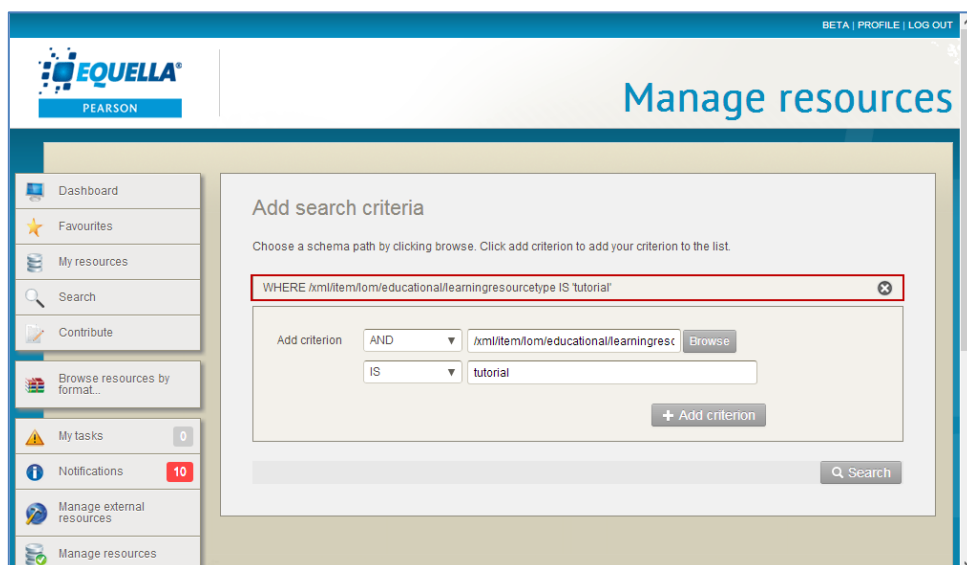
Figure 23 One Advanced Search criterion in place

4. Add any further criteria, then click [Q Search]. The matching resources display. The
   search box shows the currently selected criteria. An example is shown in Figure 24.
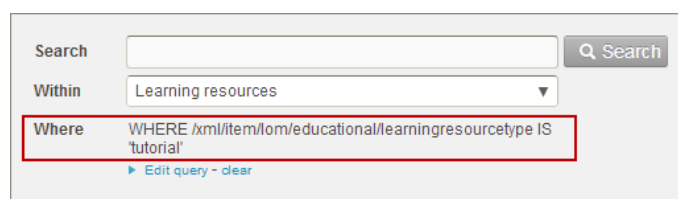
Figure 24 Search box with current criteria set

Select the **Edit query – clear** link to remove the current criteria.

Resource summary page

Individual resources can be accessed and viewed from the **Manage resources results** page.

To view a resource

1. Click on the resource title or thumbnail (e.g. *The Overland Track summary*). The resource summary page displays. An example is shown in Figure 25.
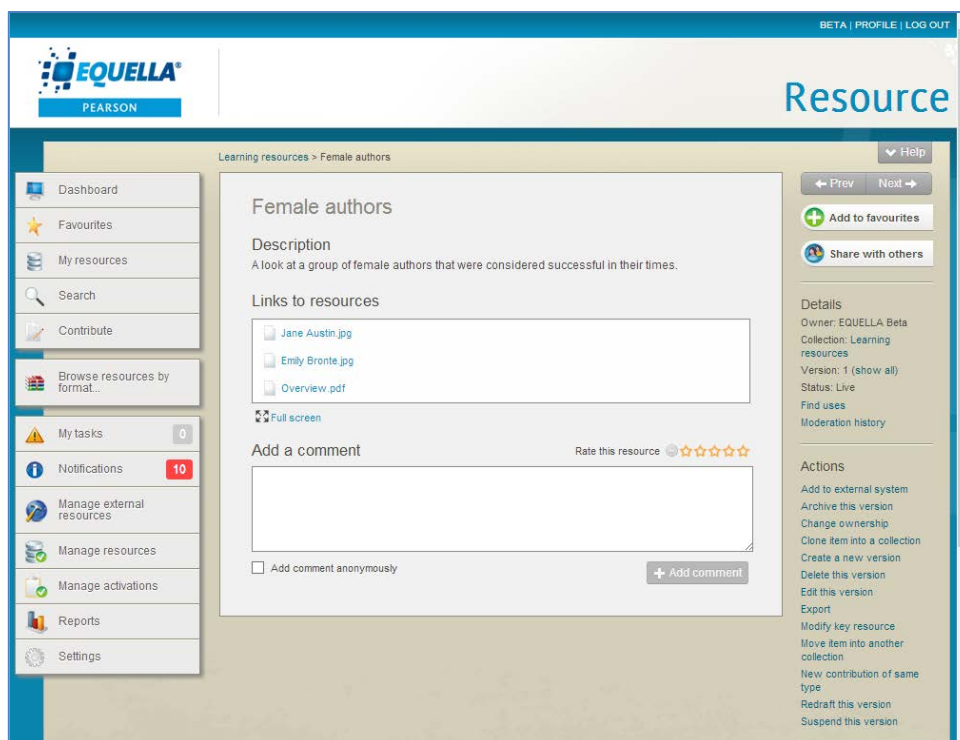
Figure 25 Resource summary page

The resource summary page is used to view, comment and rate resources. Resource owners and content managers can also manage resources and resource versions.

The main panel of the summary displays resource content, viewing options, ratings and comments, while further information and various actions can be accessed using the **Details** and **Actions** sections links.

The appearance of the resource summary page may differ according to the collection in which the resource belongs and the display template selected for that collection. See the *EQUELLA Collection Definitions Guide* for further information.

View attachments

The **Links to Resources** section displays links to attachments, thumbnail images and viewers configured to view the resources. When an attachment link is selected, the relevant screen displays, depending on the attachment type. For example, clicking on a

URL link opens the associated website page, clicking on a pdf document opens the file using a pdf reader, a YouTube link opens the YouTube website etc.

If the attachments have been packaged using the Navigation Builder during contribution, the components can be viewed separately or as a package, using the large image viewer.

Selecting the arrow to the right of the attachment link displays more information about the attachment. Information differs between attachment types. An example of a YouTube attachment is shown in Figure 26.
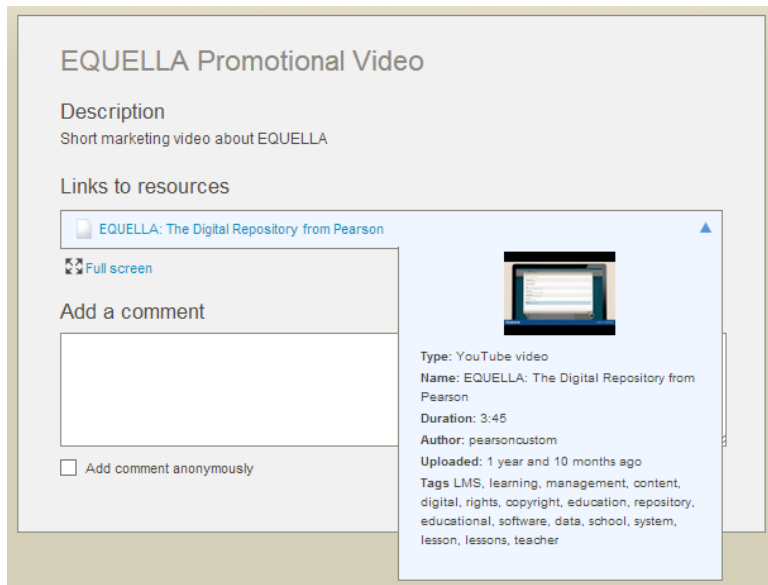
Figure 26 Show details for a YouTube attachment

The information displayed includes *Type*, *Name*, *Duration*, *Author*, *Uploaded* and *Tags***.**

To display image attachments

1. Select an image attachment link to display the image in the default viewer. An example of an image file is shown in Figure 27.
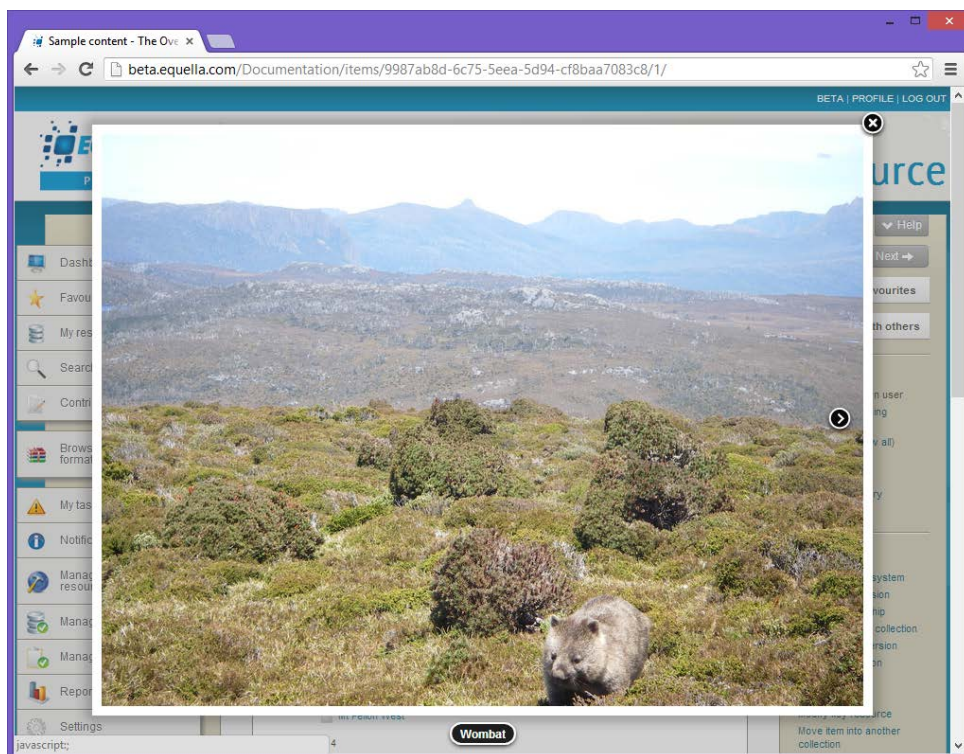
Figure 27 Image attachment displayed in default viewer

To display attachment details and viewer options

1. Select the down arrow to the right of the attachment, or click in the space between to display an expandable pane showing an image preview, name, type and size of attachment and viewer options. An example is shown in Figure 28.
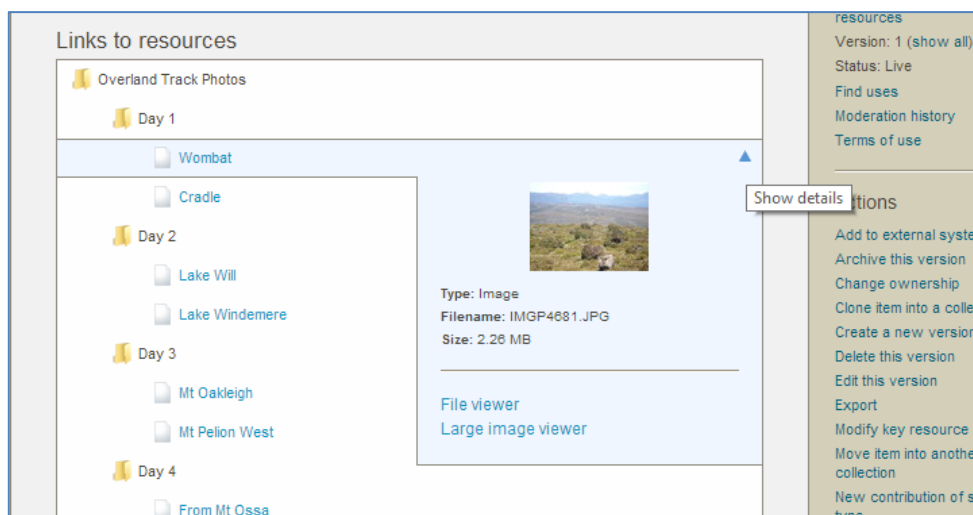
Figure 28 Attachment options

2. Select a configured viewer (e.g. *Large image viewer*) to display the attachment. An example is shown in Figure 29.
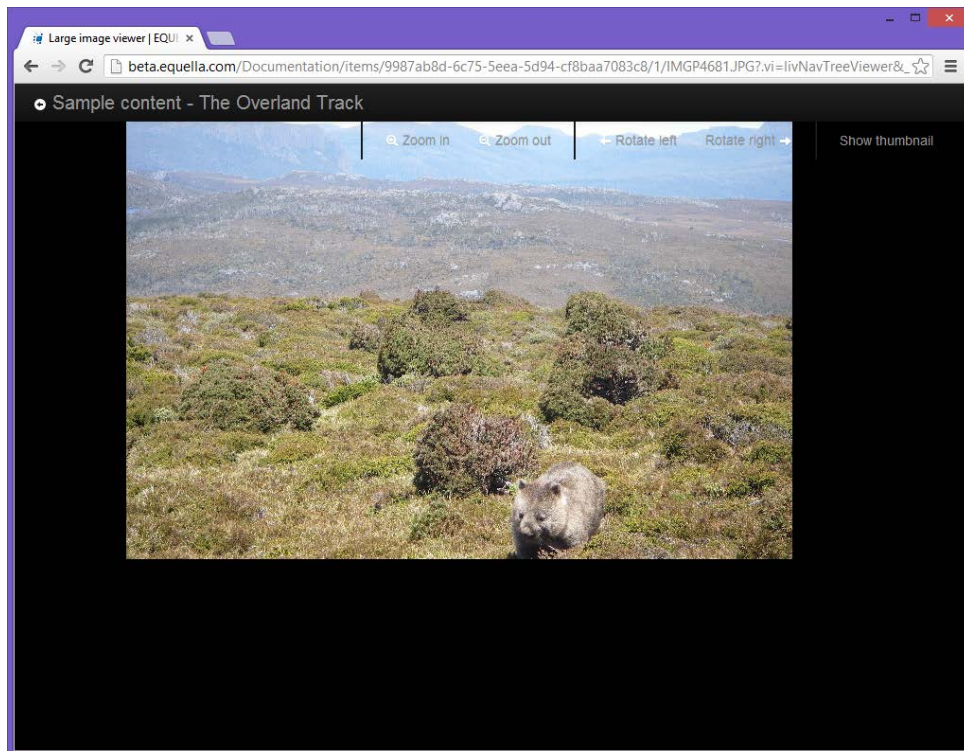
Figure 29 Attachment displayed in large image viewer

Further information is provided in the Large image viewer section on page 24.

To display multiple attachments

1. Select the **Full screen** link on the resource summary page to display all attachments in the default viewer. An example is shown in Figure 30.
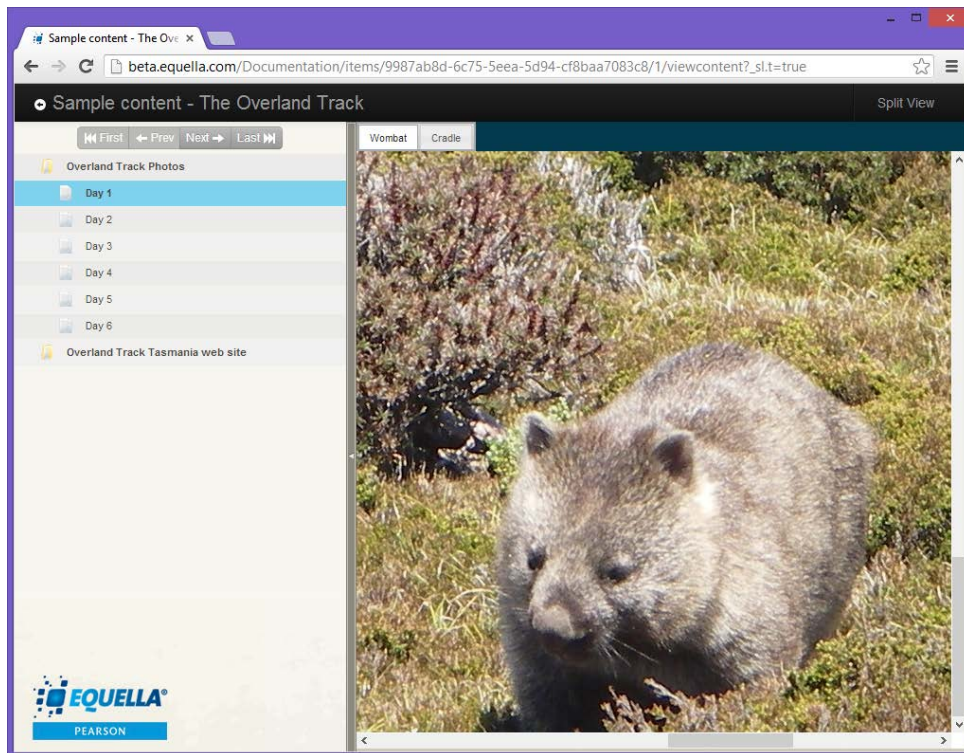
Figure 30 File viewer with packaged content

Large image viewer

An example of the large image viewer is shown in Figure 31.

Large image functionality includes:

- Zoom in, Zoom out, Rotate left and Rotate right.
- **Show thumbnail**—brings up a thumbnail to the top left corner of the image, displaying a smaller version of the image to illustrate the currently viewable portion of the image.
- **Resource name**—the resource name is a clickable link that will return the user to the resource summary page.
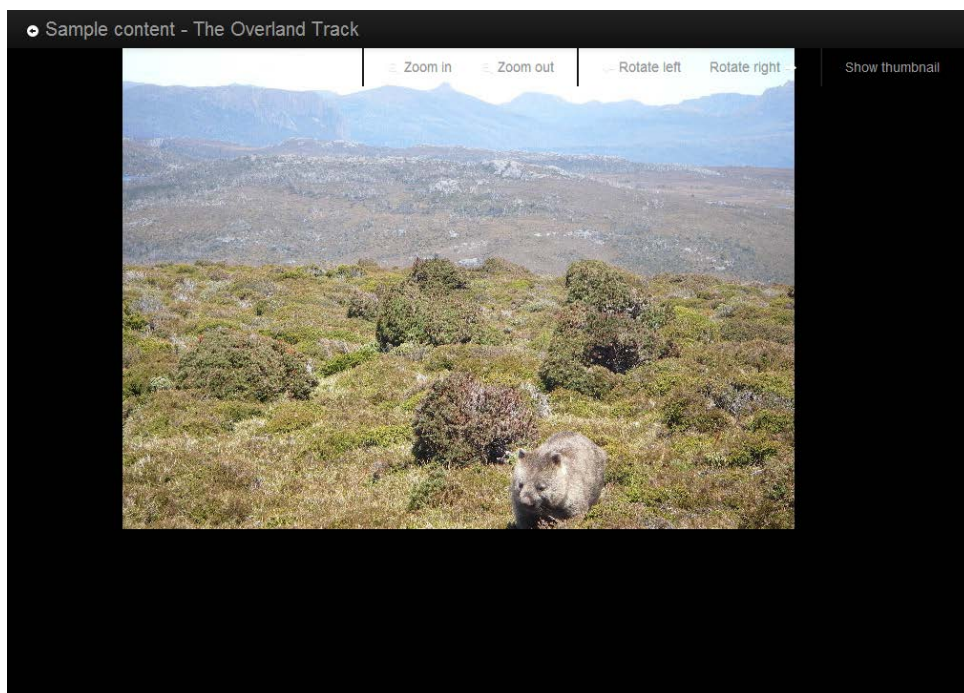
Figure 31 Large image viewer

Comments

The **<x> comments** section on the resource summary page displays previously added comments and ratings. Select the **Delete comment** link to remove the comment.

The **Add a comment** section allows users with the appropriate privileges to enter comments and rate the resource. Clicking [+ Add comment] adds the comments and rating to the <x> comments list.

To add a comment

1. Enter text in the **Add a comment** text box (e.g. '*A useful resource*').
2. Select an optional star rating (1–5). An example is shown in Figure 32.

Figure 32 Add a comment section

3. Click [+ Add comment].

To delete a comment

1. Select the ⊗ icon that appears in the top right of the comment box, as shown in Figure 33.

Figure 33 Delete comment

2. A confirmation dialog displays. Click ___OK___ .

Favourites

Individual resources that are frequently used can be added to a resource **Favourites** list, which enables the user quick access. The favourites list is then accessed from the **Favourites** link on the navigation menu.

To add a resource to favourites

1. From the resource summary page, click ⊕ Add to favourites . The **Add to favourites** dialog displays. An example is shown in Figure 34.
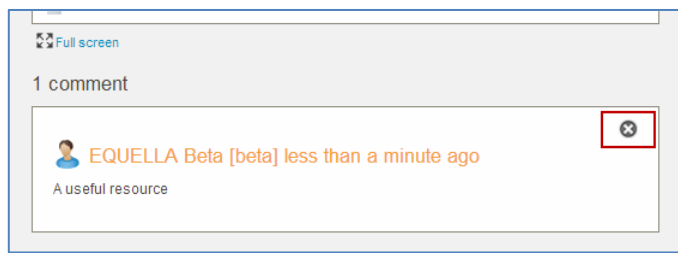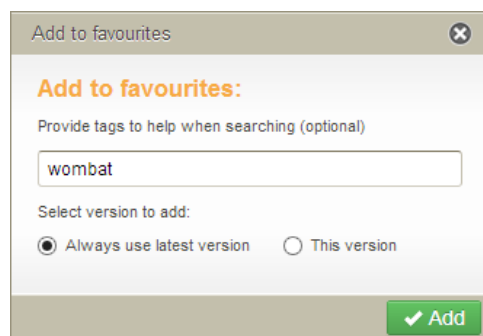

Figure 34 Add to favourites dialog

2. Enter any relevant 'tags' or key words in the edit box (e.g. *wombat*). These tags can then be used in a keyword search to discover the resource.

3. Select the required version in the **Select version to add:** field. The options are:
   - **Always use latest version**—resource listed in favourites will always be the latest version
   - **This version—**the resource listed in favourites will always be the version that was added to the favourites list, regardless of any later versions being created.

4. Click ✔ Add to add the resource to favourites.

Once the resource has been added to favourites, the button changes to ⊗ Remove favourite . Click the button to remove the resource from the favourites list.

Details

The **Details** area displays information about the resource and can include **Owner**, **Collaborators**, **Collection**, **Version** number and **Status**.

- **Owner**—the user who created the resource.
- **Collaborators**—any users who have been added as collaborators for the resource.
- **Collection**—selecting this link displays a search result list for that collection.
- **Version**—displays the version number of the current resource. Selecting the **(show all)** link displays a list of all versions, including the current live version. See <u>To view all versions of a resource</u> on page 27.
- **Status**—resource statuses can be Live, Archived, Deleted, Suspended, Review, Moderating, Rejected or Draft.
- **Find uses**—use this link to display a list of the current uses of this resource in a connected LMS (Moodle or Blackboard Learn). See <u>Find uses function</u> on page28.
- **Moderation History**—select this link to display the **Moderation history** page. Refer to the <u>Moderation history page</u> section on page 31 for more information.
- **Terms of use**—select this link to display the **Terms of use** page with terms and a list of users who have accepted those terms and date of acceptance. Refer to the <u>Terms of use page</u> section on page 29.
- **Moderation progress**—select this link to display the **Moderation progress** page. Refer to the <u>Moderation progress page</u> section on page 30 for more information.
- **Activations**—select this link to display the **Activations** page with a list of all activations for the selected resource. This link only appears if there are activations set for this resource. See <u>Activations page</u> on page 32.

To view all versions of a resource

1. Select the **(show all)** link to display the **Versions of this item** page listing all resource versions and their statuses. An example is shown in Figure 35.
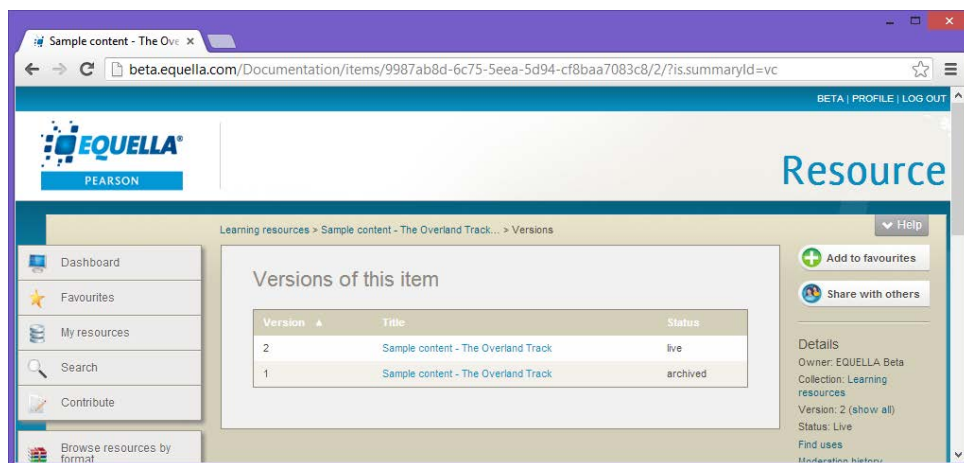
Figure 35 Versions of this item page

When a new resource has been created using the **Create a new version** action, the previous version is archived. The example in Figure 35 shows a resource with two versions. The original version appears as **1** in the **Version** column and its status displayed as *archived*. The current version is version **2**, with a status of *live*. All resources displayed in the versions list can be viewed, regardless of their status.

2. Select the **Title** of the version to display the resource summary page of the selected version.

Find uses function

The **Find uses** function is part of the EQUELLA **Push to LMS** feature.

Select **Find uses** from the Details section to display all current uses for the selected resource within a specific connector (LMS). (*NOTE: The **Find uses** link only displays if at least one external connector has been configured in the EQUELLA system.*) See the *EQUELLA Push to LMS Guide* for more detail.

EQUELLA supports Moodle and Blackboard connectors (and local resources for the Find Uses function), and more than one may be configured. If there are multiple connectors configured, a drop-down box displays, and the user selects from the list. If there is only one connector configured, the **Add to external system** screen displays immediately. (*NOTE: If the connector **Local Resources** is configured and selected, the system displays all uses of the current resource and attachments within other resources in the EQUELLA repository.*)

If there is only one connector configured, the **Find uses** screen is displayed immediately. An example is shown in Figure 36.

Figure 36 Find uses page

The Courses in which the selected resource is currently used are listed, with the **Location** and **Date added** information.

Enter course search criteria in the filter box to return only matching results.

To sort by *Course*, *Location* or *Date added*, click the column heading. Click again to reverse the order displayed.

Tick **Show all versions of this resource** to display any uses of earlier versions of the resource.

Tick **Show hidden courses and items** to display any hidden courses and items in which the selected resource is used.

Select the down arrow (which displays to the right of the **Date added column** when the cursor points at a course line) to display an expandable pane showing resource details, including **Resource version**, **Date modified,** and **Name in external system**. An example is shown in Figure 37.

Figure 37 Find uses resource details

Terms of use page

Selecting the **Terms of use** link displays the **Terms of use** page which lists the conditions that users must accept before they can view the resource. (*NOTE: The Terms of use page only displays only when Digital Rights Management is attached to the resource.*) Additionally, a list of users that have accepted those terms of use is displayed. An example is shown in Figure 38.

Figure 38 Terms of use page

Moderation progress page

Contributed resources that are in the process of moderation will have a link to the **Moderation progress page** in the Details section of the resource summary page. An example of the Moderation progress page is shown in Figure 39. This page provides information about where the resource currently sits in the moderation process and has the following elements:

- **Task**—lists the name of the current moderation task;
- **Moderators**—lists the names of the users required to accept the task;
- **Waiting for**—total time waiting for moderation since entering that task; and
- **Moderation progress**—a graphical flow chart illustrating the layout of the moderation process. The current tasks, and any accepted tasks, are highlighted.
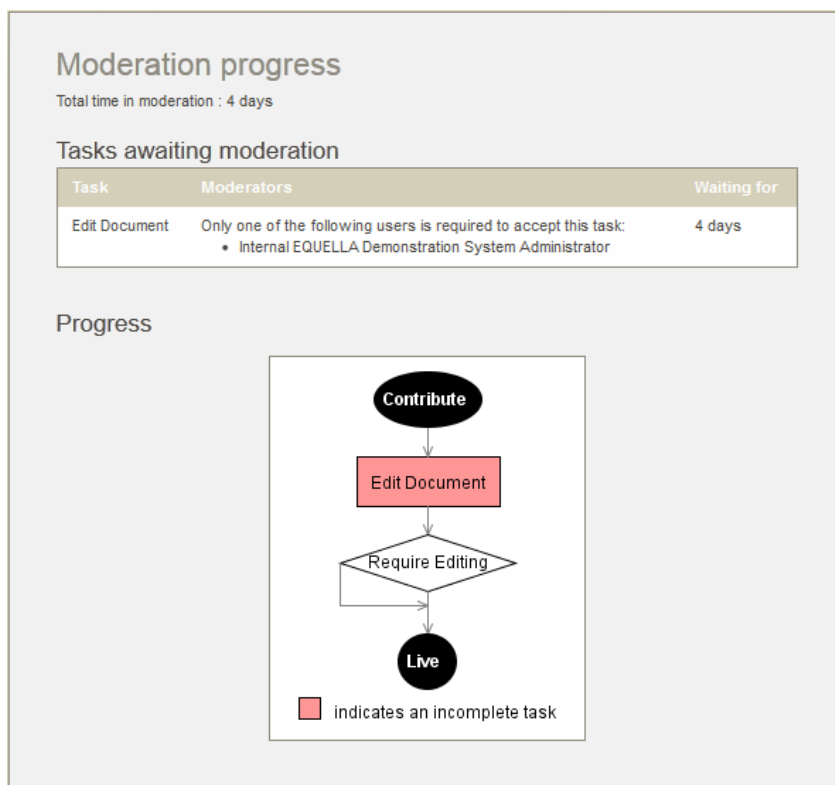
Figure 39 Moderation progress page

Moderation history page

A resource's **Moderation history** page provides details on any submission, status change and moderation events pertaining to this resource. An example of the Moderation history page is shown in Figure 40.
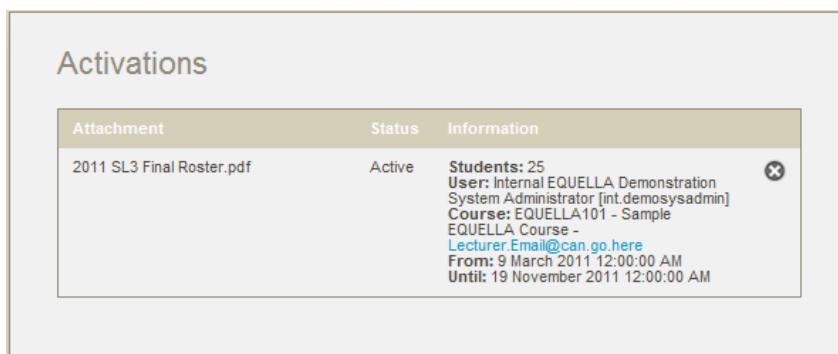

Figure 40 Moderation history page

It is made up of the following elements:

- **Event** (*Submitted for moderation, Went live* etc)—provides a descriptive name of the event.
- **User**—lists the user involved in this event.
- **Date**—shows how much time has passed since this event was performed.
- **Show edits checkbox**—switches on and off the display of Edit events in the history.
- **Show all details**—switches on and off all events in the history, including Edit and Workflow reset events.

Activations page

A resource will have an **Activations** page when it has been activated against a course. This action is restricted to resources contributed to collections with Copyright Agency Limited (CAL) configured. Once activated, users can view the resource's Activations page, similar to that in Figure 41.

Figure 41 Activations page

This page is made up of the following elements:

- **Attachment**—the name of the resource that is activated against the course;
- **Status**—the activation status of the resource; and
- Information—
  - **Students**—number of students enrolled in the course the resource has been activated against.
  - **User**—name and username of the user that activated this resource.
  - **Course**—name and description of the course the resource has been activated against.
  - **From**—the date and time the resource was made active from.
  - **Until**—the date and time the resource was made active until.

Actions

The **Actions** area can display the following operations:

Add to external system

The **Add to external system** function is part of the EQUELLA **Push to LMS** feature.

Selecting this action allows the user to add all or parts of the resource to external systems (LMSs) that have been configured in the system. (*NOTE: The **Add to external system** link only displays if at least one external (LMS) connector has been configured in the EQUELLA system.*) See the *EQUELLA Push to LMS Guide* for more information.

EQUELLA supports Moodle and Blackboard LMS connectors, and more than one may be configured. If there are multiple connectors configured, a drop-down list displays, and the user selects from the list. If there is only one connector configured, the **Add to external system** screen is displayed immediately.

The **Add to external system** function allows the addition of a resource to multiple course locations within the selected LMS connector.

To add a resource to an external system

1. Select **Add to external system** from Actions.
2. Select the external LMS system from the drop-down list to which the resource is to be added. If only one external system is set up, the **Add to external system** screen displays immediately. An example with a Moodle connector is shown in Figure 42.
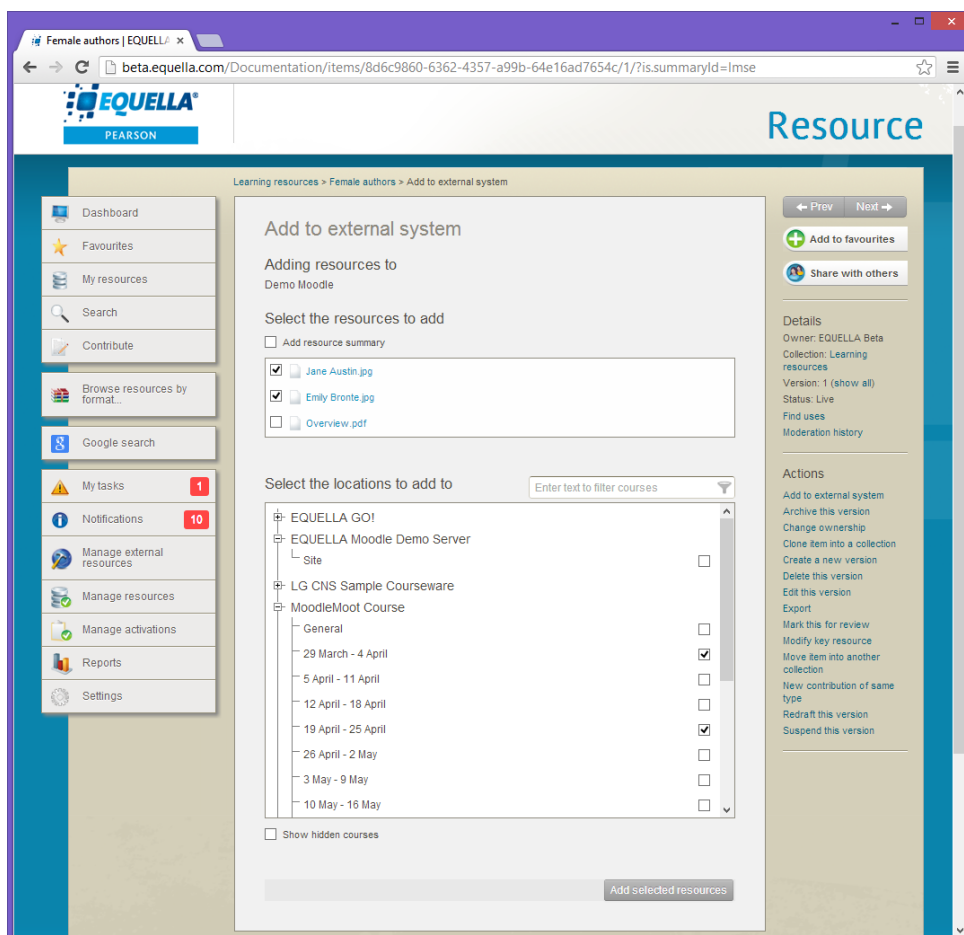

Figure 42 Add to external system

3. Select the required resources from the **Select the resources to add** section. Select the **Add resource** summary checkbox to add the resource including metadata and all attachments, or select single attachments.

4. Select the locations to which the resource should be added. Click the **Show hidden courses** checkbox (Moodle) or **Show unavailable courses** checkbox (Blackboard) to add to hidden/unavailable course locations. Select Add selected resources .

(*NOTE: Enter course search criteria in the filter box to return only matching results.*)

5. An action receipt confirming the successful addition of the resource is displayed at the top of the page. An example is shown in Figure 43.

6. Use the breadcrumbs to navigate back to the resource, as shown in Figure 43.
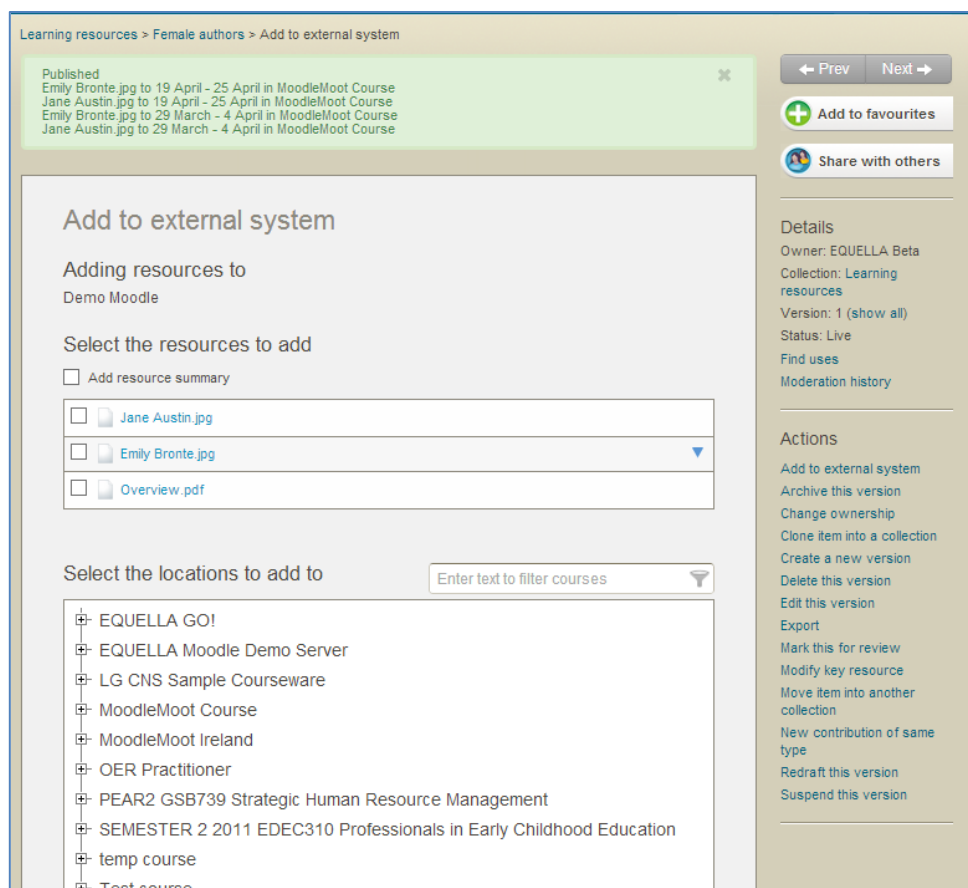
Figure 43 Successful addition of resource to Moodle location

Archive this version

This displays for resources with a status of 'Live'. Archiving hides the resource from searches (aside from the Manage resources search results), and is intended for resources that are no longer required. This includes old versions of resources that have been archived by the **Create a new version** action. The resource cannot be discovered outside of Manage resources, but remains accessible via its URL.

Change ownership

Ownership can be reassigned and other users can be added as collaborators.

To reassign ownership

1. Select the **Change ownership** link to display the **Owner and collaborators** page. An example is shown in Figure 44.

Figure 44 Owner and collaborators page

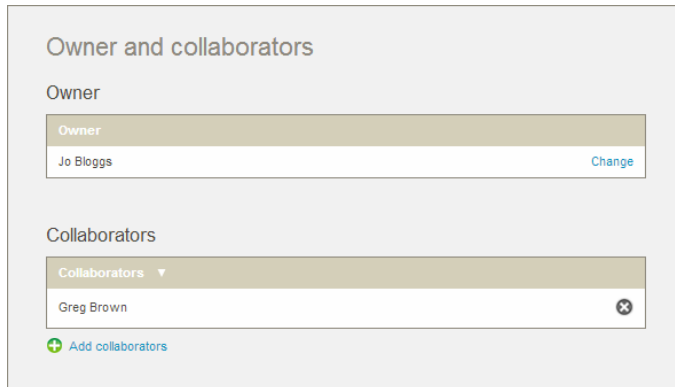2. Select the **Change** link to display the **Select a new owner** dialog where a new owner can be selected.

3. Select the **Add collaborators** link to display the **Select collaborators** dialog. Collaborators are listed with a ⊗ icon alongside them.

Clone item into a collection

Selecting this action makes a copy of the selected resource, with or without attachments, and adds it to the same or a different collection. The original version remains live, unlike the **New Version** operation where the original version is archived once the new version becomes live.

To clone a resource

1. Select the **Clone item into a collection** link to display the **Clone this item** page. An example is shown in Figure 45.
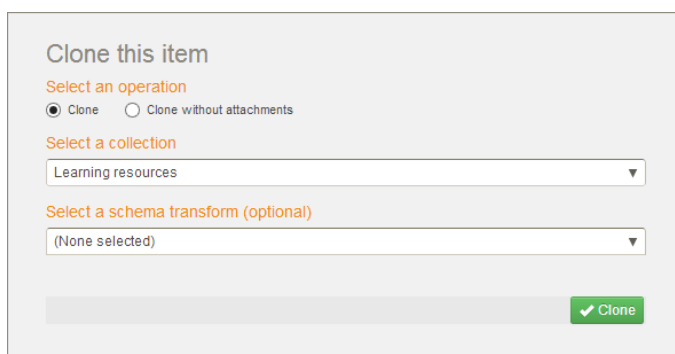

Figure 45 Clone this item page

2. Select an option from the **Select an operation** section. There are two options:
   - **Clone**—copy the entire resource, including all attachments and metadata.
   - **Clone without attachments**—copy metadata without attachments.

The cloned resource can be assigned to the same collection as the original resource, or to a different collection. The original collection is displayed as the default in the **Select a collection** section.

To assign the cloned resource to a different collection

1. Click on the **Select a collection** arrow to display a drop-down list of available collections.
2. Select a collection.

To apply an optional schema transform to the cloned resource

1. Click on the **Select a schema transform (optional)** arrow to display the options.
2. Select an option, or leave at the default **(None selected)**.
3. Click **✔ Clone**. The contribution wizard for the resource is displayed.
4. Modify the resource metadata or attachments, if required.
5. Publish, save or cancel the resource as required.

Create a new version

Selecting this action displays the contribution wizard for the resource, allowing the user to modify metadata or files, and the new version can be published or submitted for moderation. When the new version reaches the 'live' status, the current version is automatically archived.

Delete this version

This action removes the resource from the repository and marks it for purging with the next scheduled purge task. It displays in the Manage resources search results with a status of *Deleted*.

Edit this version

Selecting this action displays the contribution wizard for the resource, allowing the user to modify metadata or attachments. Any changes made are saved to the current version.

Export

Export a resource to one of the formats listed. Resources can be exported as an IMS package or a METS record with or without attachments.

Modify key resource

Resources can be added as key resources to one or more hierarchy topics during contribution.

To add or remove a key resource to a hierarchy topic

1. Select **Modify key resource** to display the **Modify key resource page.** An example is shown in Figure 46.

Figure 46 Modify key resource page

2. Click on the plus sign ⊞ to expand the hierarchy tree and display any subtopics.

3. Select the checkboxes next to the hierarchy topics or subtopics (including dynamic subtopics) to which the resource is to be added as a key resource. Multiple checkboxes can be selected. An example is shown in Figure 46.

*NOTE: Hierarchy topics or subtopics where the selected resource already exists as a key resource display as checked when the **Modify key resource** page opens. Uncheck to remove the resource as a key resource.*

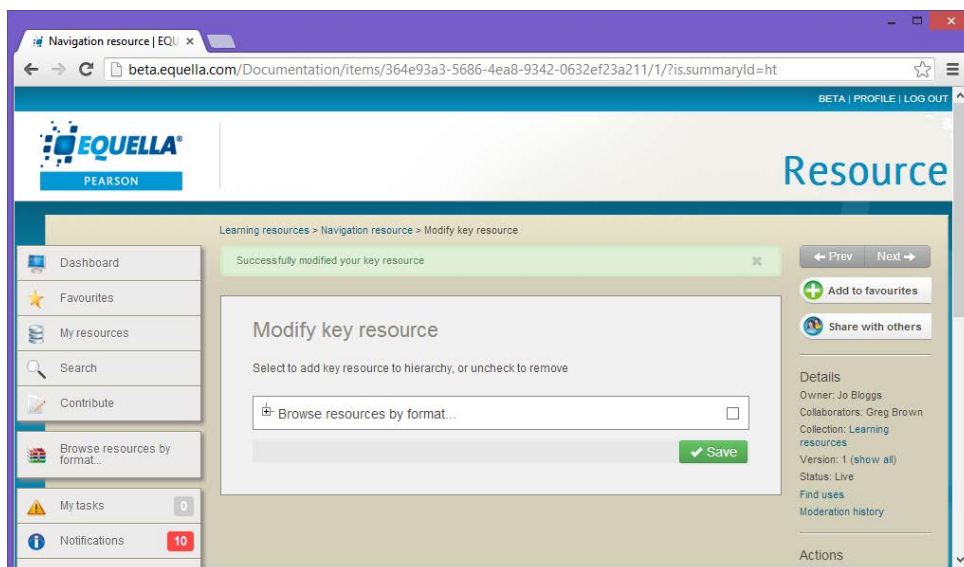4. Click ✔ Save . A confirmation screen displays, as shown in Figure 47.

Figure 47 Confirmation of Key resource modification

The resources have now been added (or removed) as key resources for the selected hierarchy topics and/or subtopics.

See the *EQUELLA Hierarchy Configuration Guide* for further information on hierarchies and key resources.

Move item into another collection

Selecting this action allows the selected resource to be transferred to a different collection.

To move a resource

1. Select the **Move item into another collection** link to display the **Move this item** page. An example is shown in Figure 48.
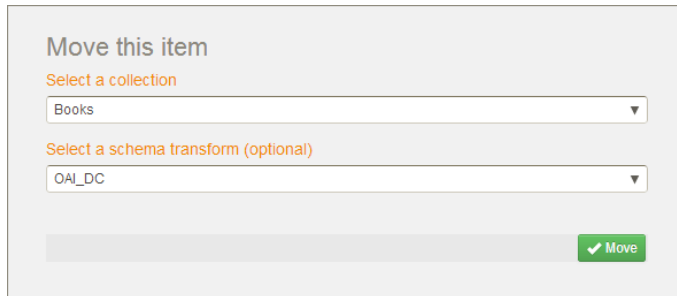

Figure 48 Move this item page

2. Click on the **Select a collection** arrow to display a drop-down list of available collections.
3. Select a collection.

To apply a preferred schema transform to the moved item

1. Click on the **Select a schema transform (optional)** arrow to display the options.
2. Select an option, or leave at the default **(None selected)**.
3. Click ✔ **Move**.

The contribution wizard for the resource is displayed.

4. Modify the metadata or attachments, if required.
5. Publish, save or cancel the resource as required.

New contribution of same type

Selecting this action displays a contribution wizard where a new resource can be contributed to the same collection.

Redraft this version

This action is intended for resources that require redrafting prior to moderation workflow completion. Selecting this operation allows the resource to be edited and re-submitted for moderation or saved as a draft. Redraft is intended for use with resources that have not been made *live.*

Suspend this version

This displays for resources of all statuses. This action hides the resource from searches (excepting the Manage resources search results) and is intended for temporary removal of resources from the repository, for example the removal of links for sites that are temporarily unavailable. The resource cannot be discovered but remains accessible via its URL. A **Resume this version** action is available for suspended resources.

Bulk actions

Administrators can manage individual or multiple resources in a single operation using the ⟨Perform an action⟩ button to the right-hand side of the Manage resources page. An example is shown in Figure 49.
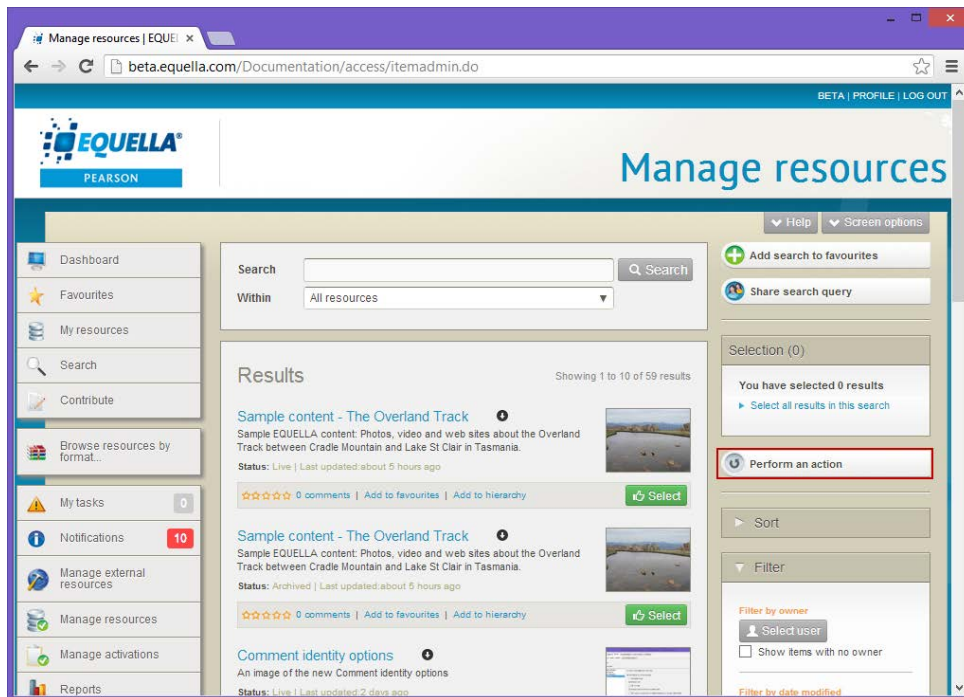

Figure 49 Perform an action control

To perform an action

1. Select the required resource or resources by clicking ⟨Select⟩ beside each resource. To select all resources on the results page, click the **Select all results in this search** link in the *Selection* pane.

2. Click ⟨Perform an action⟩ to display the **Bulk actions** page, as shown in Figure 50.
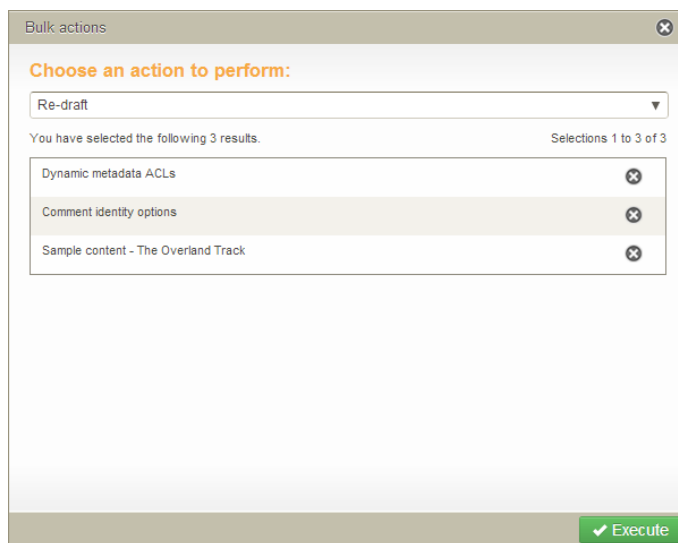
Figure 50 Bulk operations list

The selected resources are listed. To unselect a resource, click the corresponding ⊗ icon.

3. Select an action from the **Choose an action to perform:** drop-down list (e.g. *Archive*) then click ✔ Execute. A confirmation dialog displays, as shown in Figure 51.
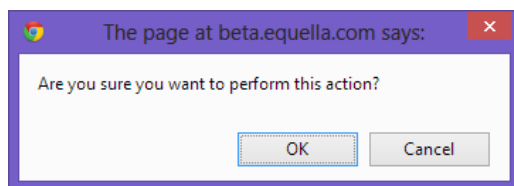

Figure 51 Confirmation dialog

4. Click OK to proceed. An information dialog displays, confirming the action was successful. In the case of an unsuccessful action, an error message displays with an explanation of the failed action.

The following **Actions** are available:

Re-draft

Selecting this action changes the selected resources from their current status to a *Draft* status, which means they are under construction, or have not yet been published or submitted for moderation.

Submit for moderation

The **Submit for moderation** action enters resources with the status of *Draft* into the moderation workflow. On completion of this action, the resources will have a status of *moderating.*

Delete

The **Delete** action removes the selected resources from the repository. Deleted resources are removed permanently with the next scheduled purge (typically configured to run on the weekend), and cannot be recovered. A deleted resource can be restored to a *live* state using the **Restore** bulk operation providing this is done before it is purged.

Purge

When resources have been *deleted*, selecting the **Purge** operation will permanently remove selected resources from the repository. Resources that have been purged are not recoverable.

Make live

The **Make live** action restores resources with a current status of *archived* to a *live* state.

Reset workflow

The **Reset Workflow** action resets the moderation process to the beginning of a workflow for the selected resources (for example, if a number of resources have been edited by their owners and require moderation by other users). Resources will become *live* when they have reached the appropriate step in the workflow.

Restore

When resources have been deleted, selecting the **Restore** action will restore *deleted* resources to a *live* state.

Archive

The **Archive** action removes selected resources from the *live* status, so that they are no longer available to repository users other than the resource owner and the system administrator. Unlike *deleted* resources, these resources will not be removed completely from the system when a scheduled purge is performed.

Suspend

The **Suspend** action is used to temporarily remove a resource from the repository (e.g. *if a URL link was temporarily unavailable*). The resource status is changed to suspended and does not appear in search results. Each suspended resource can be made live again using the **Resume this version** link from the Actions section on the Resource summary page.

Review

The **Review** action is intended for resources that have completed a workflow and allows resources in the *live* state to be checked for currency. Selecting this operation causes the resource to re-enter a moderation workflow.

Change owner

The **Change owner…** action allows another owner to be assigned to selected resources. When selecting this option, a ` Next → `.button displays. Once clicked, the **Select user(s)** page displays. (Only one user can be selected). Search for the required user by entering search terms or the wildcard (*) character in the search bar and click ` Q Search `. A list of matching results is returned. Select a user from the list and click ` ✔ Execute `.

Clone

The **Clone…** action makes a copy of selected resources, with or without attachments, into the same or a different collection. When selecting this option, a ` Next → `.button displays. Once clicked, a selection dialog displays, as shown in Figure 52.
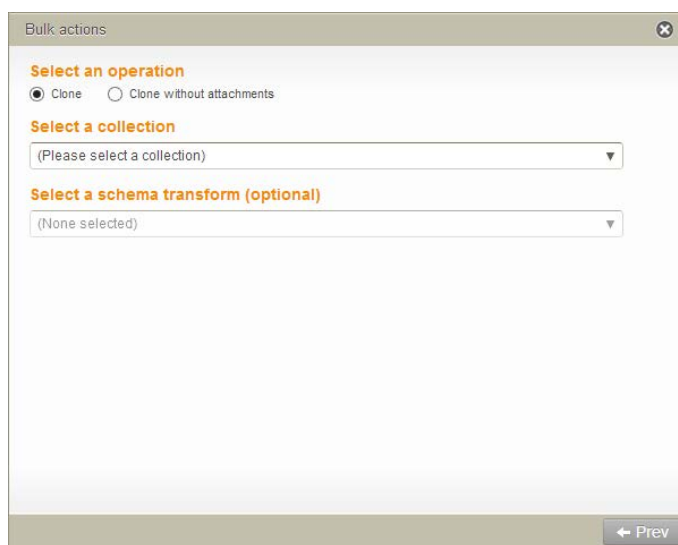
Figure 52 Clone… operation selection dialog

The **Select an operation** section provides two options:

- **Clone**—clone the entire resource, including all attachments and resource metadata
- **Clone without attachments**—clone resource metadata without attachments.

The cloned resource can be assigned to the same collection as the original resource, or to a different collection. Select a collection from the **Select a collection** drop-down list.

Once a collection has been selected, the dialog displays a new option: **Do you want to submit the items for moderation, or save as draft?**

The **Do you want to submit the items…** section provides two options:

- **Save Draft**—save the cloned resources as drafts, allowing further changes prior to publishing, if required
- **Submit For Moderation**—submit the cloned resources for moderation.
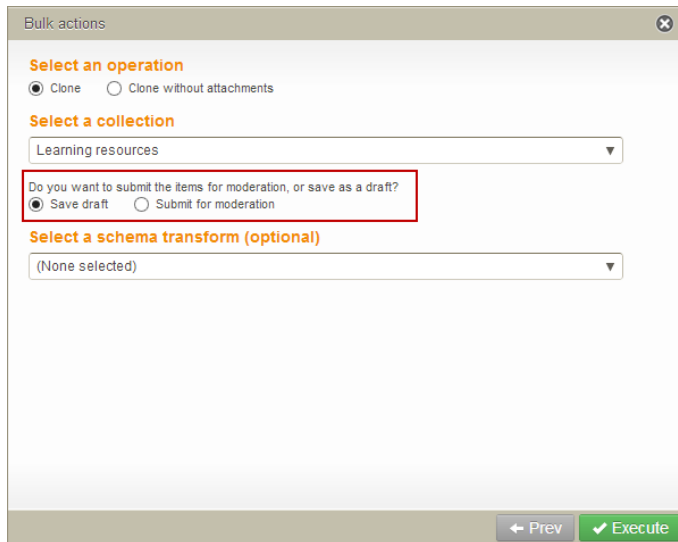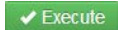
An example is shown in Figure 53.

Figure 53 Draft or moderation options

A preferred schema transformation can be applied to the cloned resources, if required. Click on the **Select a schema transform** down arrow to display the following options:

- (none selected)
- MARCXML to Book
- MARCXML to Journal
- MODS to Book
- MODS to Journal.

More information on schemas is provided in the *EQUELLA Schema Reference Guide*.

Click ✔ Execute to complete the action.

Move

The **Move...** operation transfers selected resources into a different collection. When selecting this option, a [Next →] .button displays. Once clicked, a selection dialog displays, as shown in Figure 54.
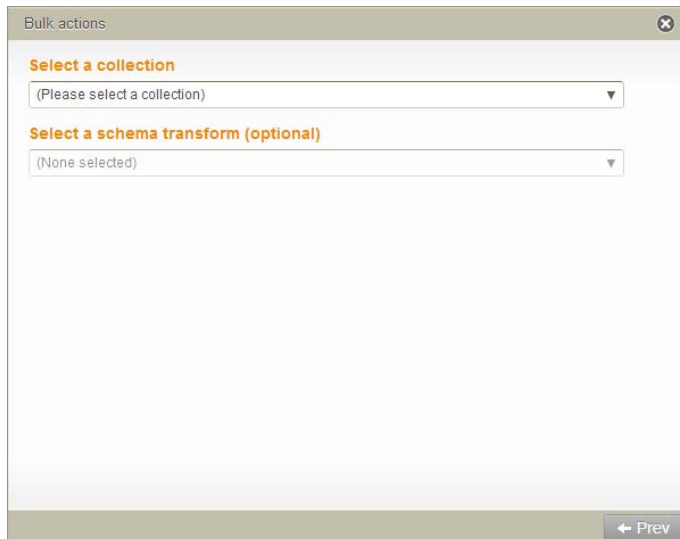
Figure 54 Move... bulk operation selection dialog

Select a collection to move the resources to from the **Select a collection** drop-down list.

A preferred schema transformation can be applied to the cloned resources, if required. Click on the **Select a schema transform** down arrow to display the following options:

- (none selected)
- MARCXML to Book
- MARCXML to Journal
- MODS to Book
- MODS to Journal.

More information on schemas is provided in the *EQUELLA Schema Reference Guide*.

Click [✔ Execute] to complete the action.

Set pricing tiers

This bulk action is used with EQUELLA systems that are set up as a Store. Please see the *EQUELLA Store User Guide* for further information.

Execute Script

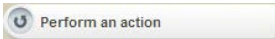The **Execute script** action allows users to run scripts across the selected resources. When selecting this option, a [Next →] .button displays. Once clicked, the **Execute script** dialog displays, as shown in Figure 55.

Figure 55 Execute script dialog

To run a script

1. The user can either:

    ▪ Enter the required script, or

    ▪ Click [Load a script] and select a pre-saved script (see the *EQUELLA Administration Overview Guide* for information on saving *User scripts*). An example is shown in Figure 56.

Figure 56 Load a script drop-down

2. Once a script is complete, click [Check syntax]. A *Syntax ok!* message should display in the bottom left-hand corner. An example is shown in Figure 57.

Figure 57 Syntax OK

If a syntax error displays, check your script for errors, then recheck the syntax.

3. Click [Preview ➜] to preview the first result of the action. An example is shown in Figure 58.
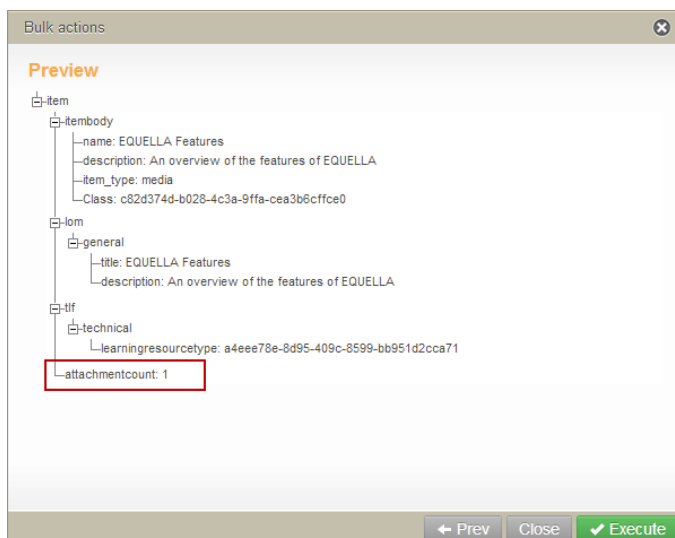
Figure 58 First result of script

4. After checking that the preview shows the required results, click [✔ Execute]. A confirmation dialog displays. Click [OK].

5. The script is executed for all the selected items, and the final confirmation dialog displays.

6. Click [Close].

Add to catalogues

This bulk action is used with EQUELLA systems that are set up as a Store. Please see the *EQUELLA Store User Guide* for further information.

Exclude from catalogues

This bulk action is used with EQUELLA systems that are set up as a Store. Please see the *EQUELLA Store User Guide* for further information.

Edit metadata

The **Edit metadata** action is used to change the same metadata properties for the selected resources. The following actions are available:

- **Find and replace** – enables the user to select one or more nodes, then run a text find and replace process.
- **Set text** – enables the user to specify text to be added to specified nodes. This can include existing nodes or new nodes, with the new nodes being automatically added if required.
- **Add node** – enables the user to specify xml to be added to the selected node.

NOTE: Use this option with caution. Using this option incorrectly may result in problems with resource metadata. It is recommended that the actions required to be performed are run on a staging server prior to running them on your live data.

Find and replace

To use the Find and replace function

1. Select **Manage resources** from the navigation menu.
2. Select one or more items, then click [Perform an action].
3. Select **Edit metadata** from the drop-down list, then click [Next ➔]. The **Modifications** dialog displays, as shown in Figure 59.
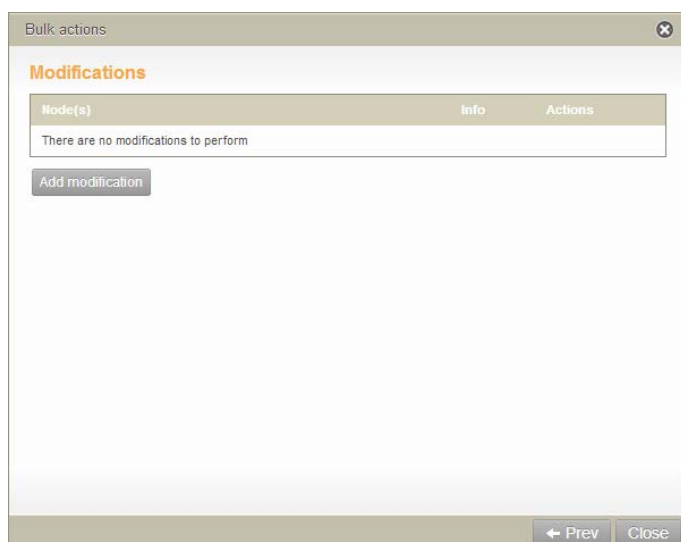

Figure 59 Modifications dialog

4. Click Add modification . The **Select schema nodes** dialog displays. Select the relevant schema from the drop-down list (e.g. *Generic schema).* The schema nodes are listed. An example is shown in Figure 60.
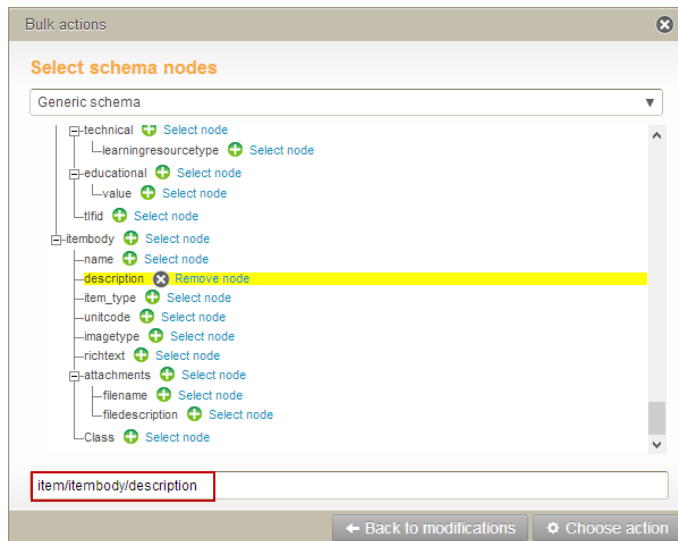

Figure 60 Select schema nodes dialog

5. Select the node/s (e.g. *item/itembody/description*) that contain the text to be replaced by clicking the **Select node** link.

6. Once the nodes are selected, click Choose action . The **Choose an action to perform** dialog displays.

7. Select **Find and replace** from the drop-down list. The dialog now displays **Find** and **Replace** fields. An example is shown in Figure 61.
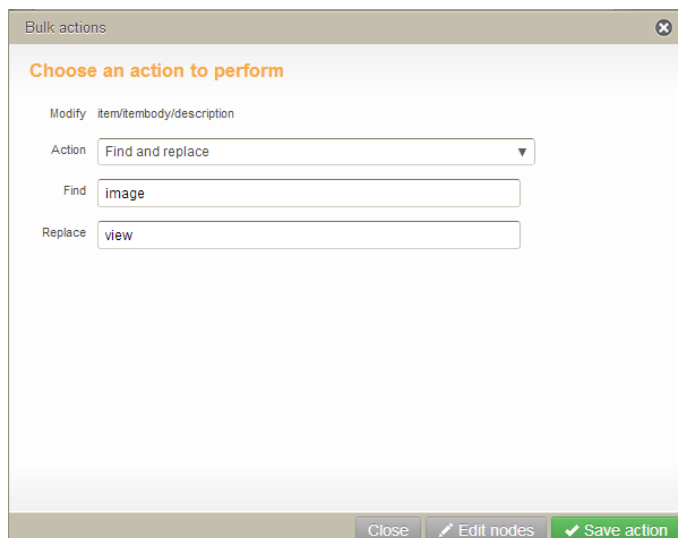
Figure 61 Find and replace dialog

8. Enter the **Find** (e.g. *image*) and **Replace** (e.g. *view*) text, then click Save action . The **Modifications** dialog displays, with the *Find and replace* action listed. An example is shown in Figure 62.
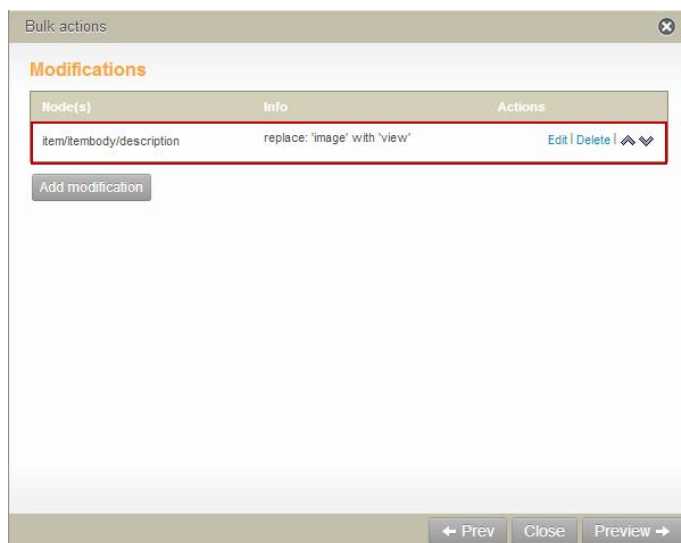
Figure 62 Modifications dialog with listed action

More tasks can be added by clicking [Add modification]. When there are multiple actions listed, they can be reordered by using the arrow buttons.

9. Click [Preview →] to preview the first result of the action. An example is shown in Figure 63.
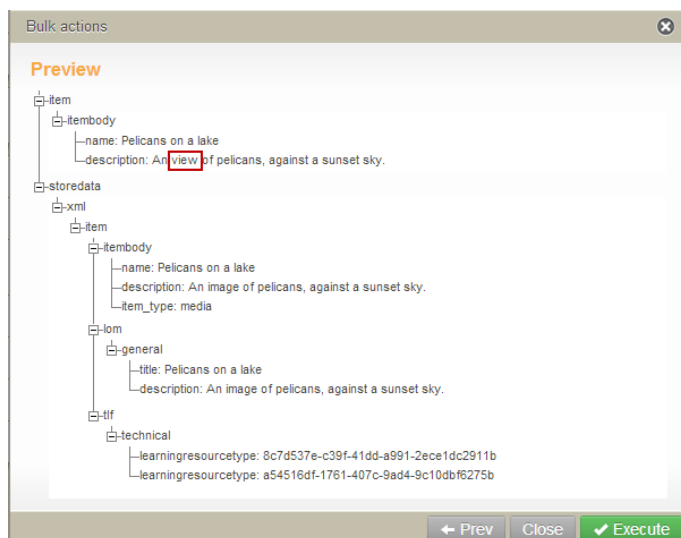

Figure 63 Preview showing the first result of the action

10. After checking that the preview shows the required results, click [✔ Execute]. A confirmation dialog displays. Click [OK].

11. The action is executed for all the selected items, and the final confirmation dialog displays. An example is shown in Figure 64.
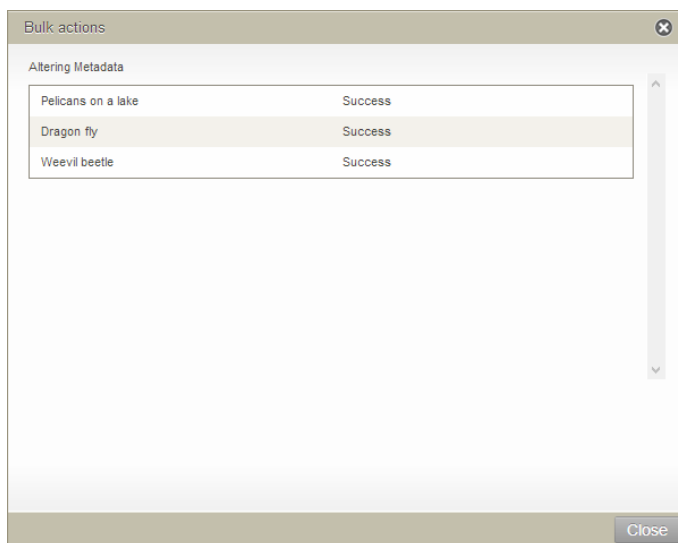
Figure 64 Confirmation dialog

12. Click Close .

Set text

To use the Set text function

1. Select **Manage resources** from the navigation menu.

2. Select one or more items, then click Perform an action .

3. Select **Edit metadata** from the drop-down list, then click Next ➜ . The **Modifications** dialog displays, as shown in Figure 65.
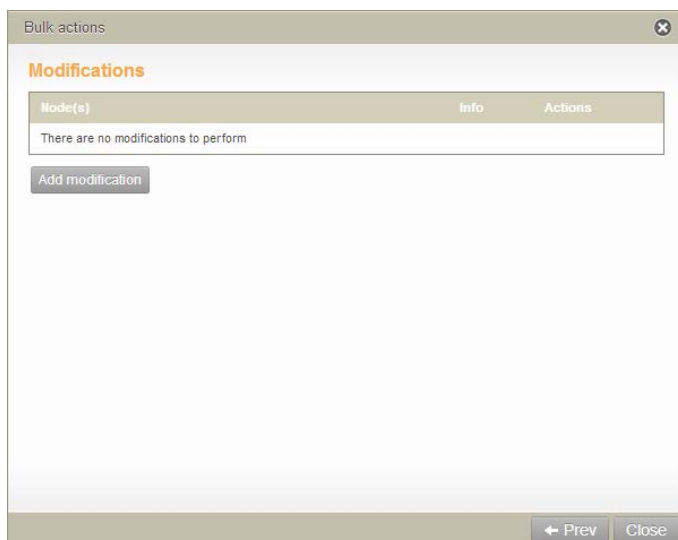

Figure 65 Modifications dialog

4. Click Add modification . The **Select schema nodes** dialog displays. Select the relevant schema from the drop-down list (e.g. *Generic schema).* The schema nodes are listed. An example is shown in Figure 66.
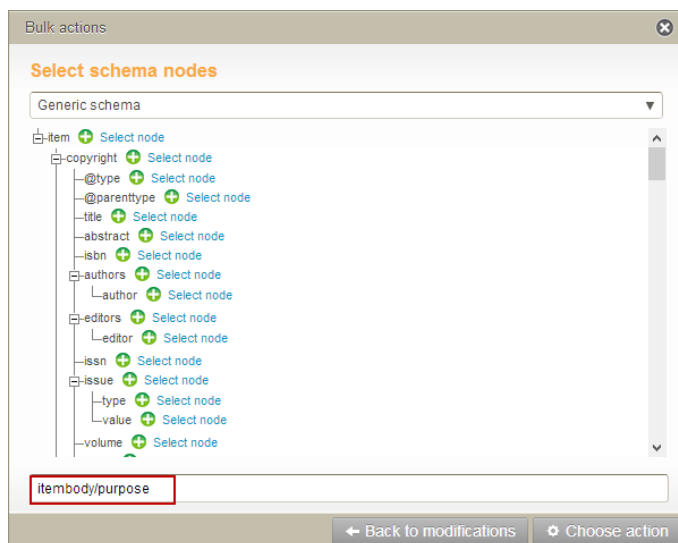
Figure 66 Select schema nodes dialog

5. Select the node/s by clicking the **Select node** link or type in a new node (e.g. *item/itembody/purpose*) that text will be set for.

NOTE: Users are not limited to existing nodes. New nodes can be manually entered in the text box, and will be added when the selected action is executed. For example, /item/itembody/purpose.

6. Once the node/s are selected or entered, click [⚙ Choose action]. The **Choose an action to perform** dialog displays.

7. Select **Set text** from the drop-down list. The dialog now displays a **Text** field. An example is shown in Figure 67.
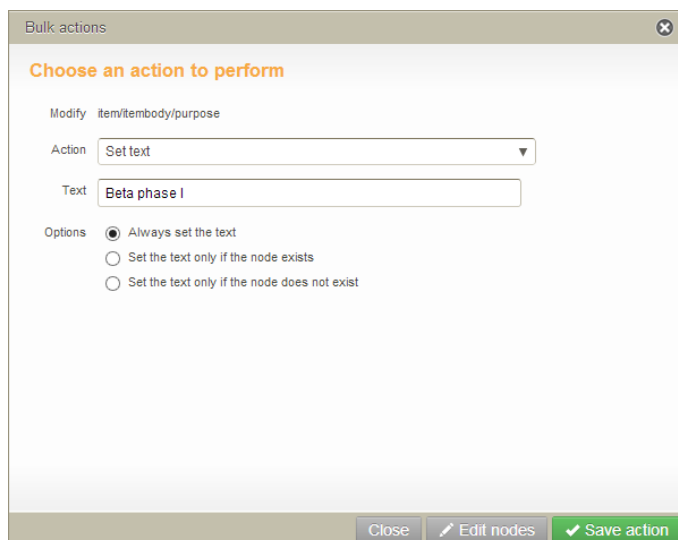
Figure 67 Set text dialog

8. Enter the text to be added to the selected node/s.

NOTE: Text existing in the selected node/s will be replaced with the new text.

9. Select an option:

- **Always set the text** – this will always set the text, including creating the node if it doesn't already exist. Any existing text will be replaced.
- **Set the text only if the node exists** – the text is set only if the specified node exists.
- **Set the text only if the node does not exist** – this will add the node and set the text for items where the node doesn't already exist.

10. Click ![Save action]. The **Modifications** dialog displays, with the Set text action listed. An example is shown in Figure 68.
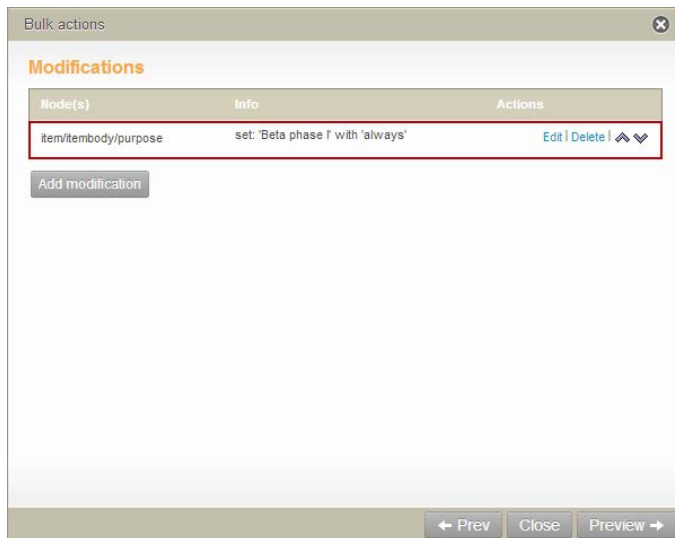
Figure 68 Modifications dialog with listed action

More tasks can be added by clicking ![Add modification]. When there are multiple actions listed, they can be reordered by using the arrow buttons.

11. Click ![Preview →] to preview the first result of the action. An example is shown in Figure 69.
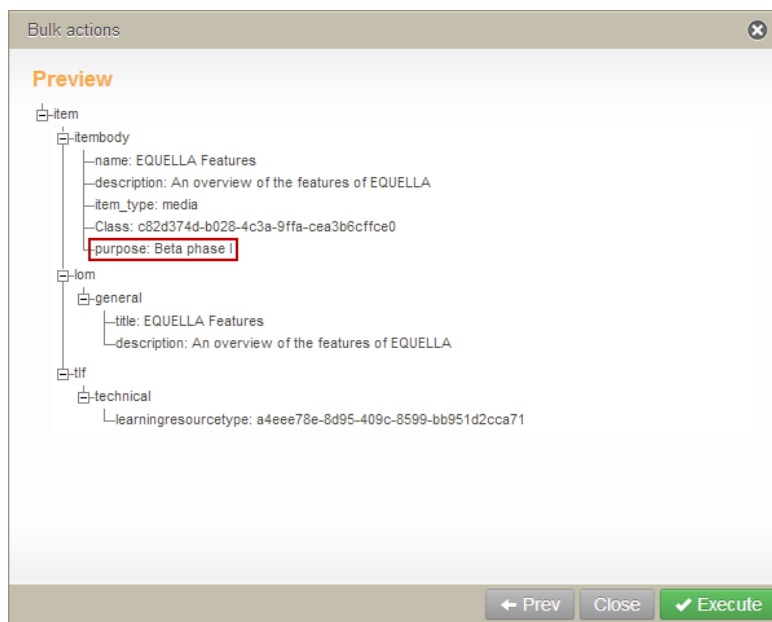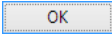
Figure 69 Preview showing the first result of the action

12. After checking that the preview shows the required results, click ✔ Execute . A confirmation dialog displays. Click OK .

13. The action is executed for all the selected items, and the final confirmation dialog displays.

14. Click Close .

Add node

To use the Add node function

1. Select **Manage resources** from the navigation menu.

2. Select one or more items, then click Perform an action .

3. Select **Edit metadata** from the drop-down list, then click Next ➔ . The **Modifications** dialog displays, as shown in Figure 70.

Figure 70 Modifications dialog

4. Click [Add modification]. The **Select schema nodes** dialog displays. Select the relevant schema from the drop-down list (e.g. *Generic schema).* The schema nodes are listed. An example is shown in Figure 71.
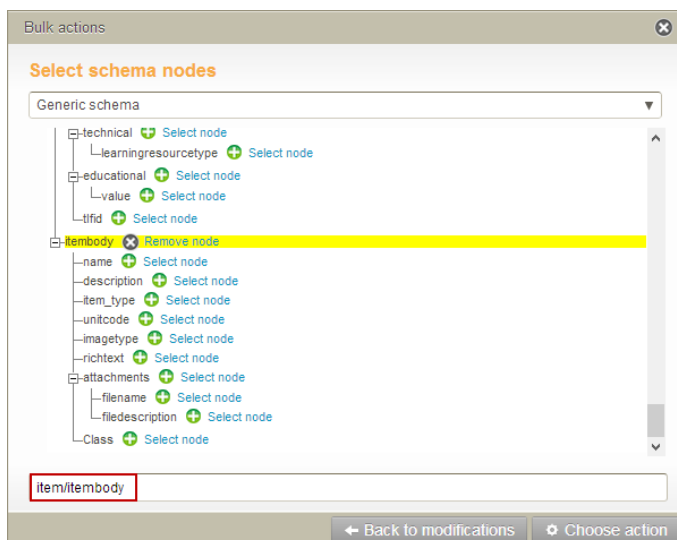

Figure 71 Select schema nodes dialog

5. Select the node/s (e.g. *item/itembody*) that contain the text to be replaced by clicking the **Select node** link.

NOTE: Users are not limited to existing nodes. New nodes can be manually entered in the text box, and will be added when the selected action is executed. For example, /item/itembody/purpose.

6. Once the nodes are selected, click [Choose action]. The **Choose an action to perform** dialog displays.

7. Select **Add node** from the drop-down list. The dialog now displays an **XML** text box. An example is shown in Figure 72.
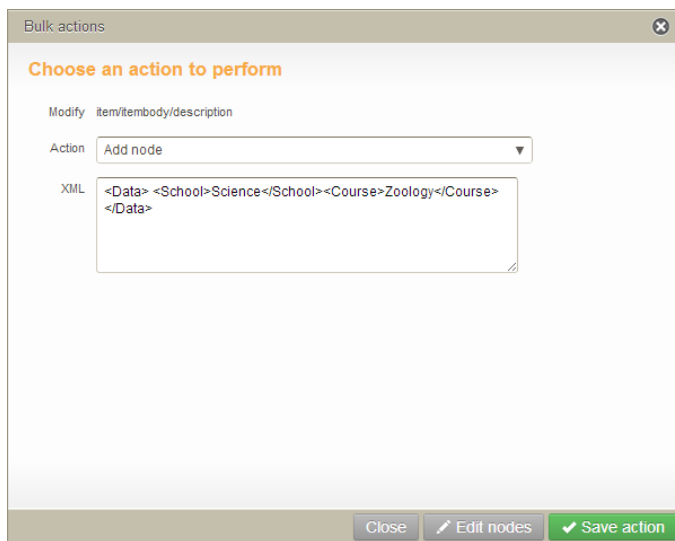
Figure 72 Add node dialog

8. Enter the xml be added to the selected node/s.

9. Click [✔ Save action]. The **Modifications** dialog displays, with the Add node action listed. An example is shown in Figure 73.
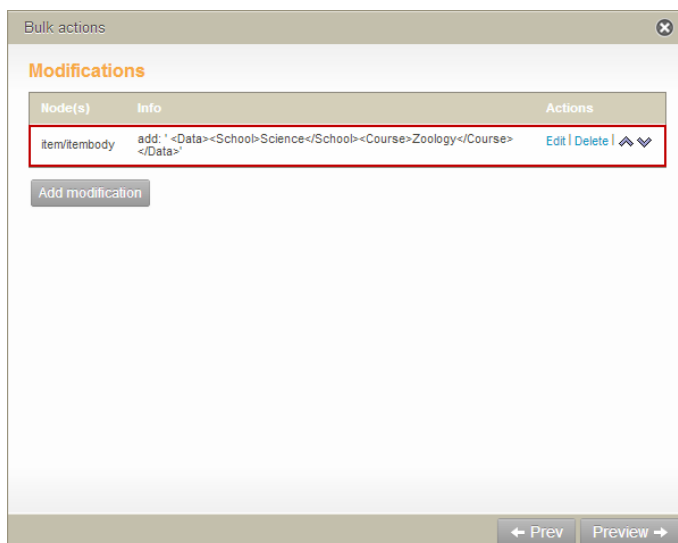
Figure 73 Modifications dialog with listed action

More tasks can be added by clicking [Add modification]. When there are multiple actions listed, they can be reordered by using the arrow buttons.

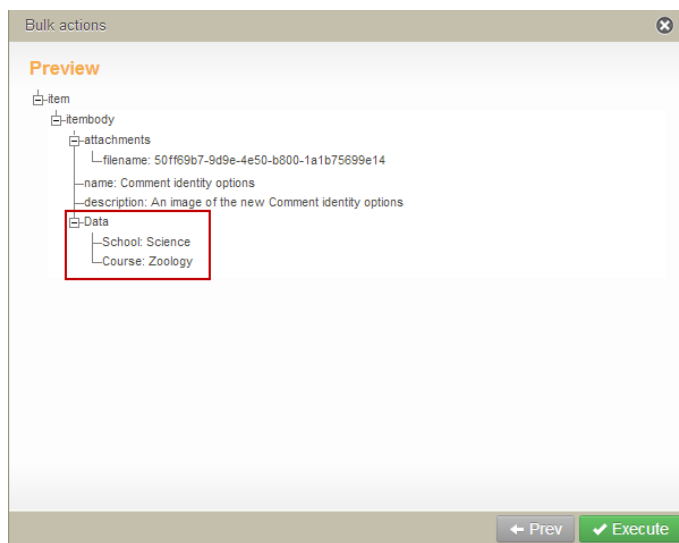10. Click [Preview →] to preview the first result of the action. An example is shown in Figure 74.

Figure 74 Preview showing the first result of the action

11. After checking that the preview shows the required results, click ✔ Execute . A confirmation dialog displays. Click OK .

12. The action is executed for all the selected items, and the final confirmation dialog displays.

13. Click Close .

My content

Selecting **My content** from the *Within* drop-down on the Manage resources page displays all web pages and files that have been created or uploaded through all users' scrapbooks. An example is shown in Figure 75.
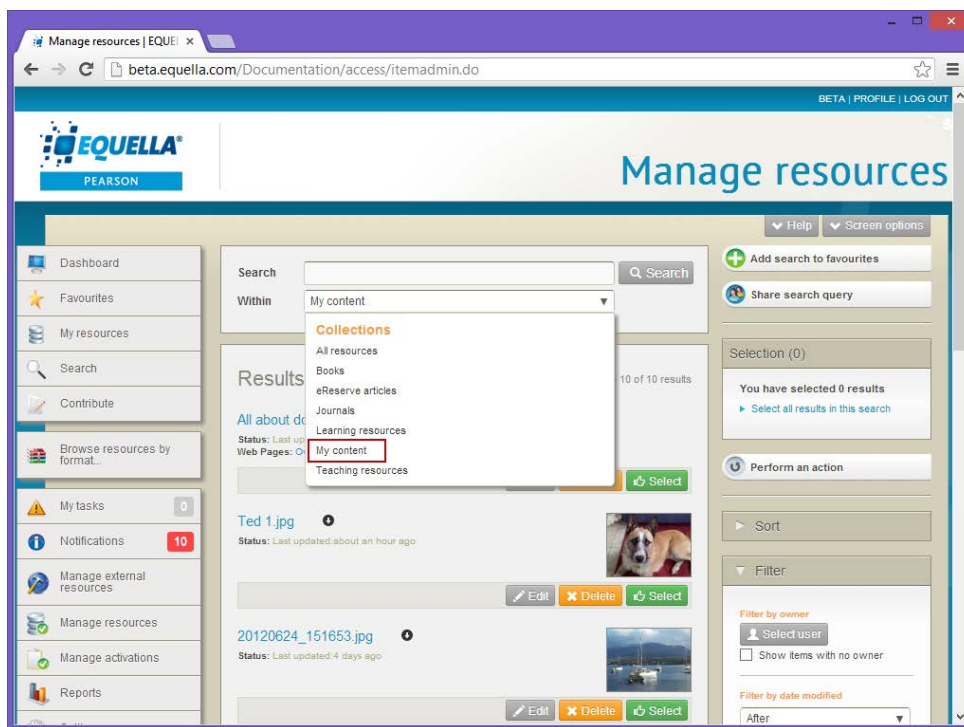
Figure 75 My content - displays scrapbook items

Scrapbook items display with *Edit, Delete* and *Select* options. An example is shown in Figure 76.

Figure 76 Scrapbook items

Select [✎ Edit] to open the item for editing.

Select [✖ Delete] to delete the item. Once selected, the *Edit* and *Delete* options no longer show, but a [+ Restore] button displays. Select this button to restore the item. An example is shown in Figure 77.
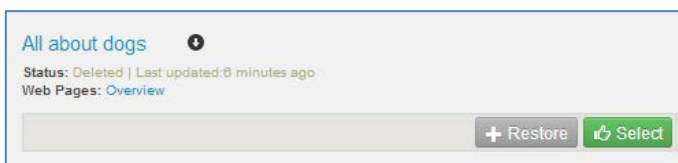

Figure 77 Deleted scrapbook item with Restore button

Deleted scrapbook items will be purged during the next scheduled purge event, and are no longer available for restoring once this event has occurred.

Select multiple scrapbook items to use the **Perform an action** action. Bulk actions that can be performed on scrapbook items are *Delete* and, for deleted items, *Purge.*

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/.