

EQUELLA®

# Moodle User Guide

*Version 6.4*

## Document History

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# Overview

EQUELLA is an advanced digital repository that can be integrated with the Moodle™ course management system. From within Moodle, users can access the EQUELLA repository to search, create and manage content such as images, audio, video, packaged content, web links, text, PDFs and Microsoft Office™ documents. Content can then be incorporated into Moodle courses.

The purpose of this guide is to demonstrate to users how to integrate EQUELLA resources using Moodle. Users will learn how to search for, create and manage available resources, and how to add these materials to courses. For information on configuring EQUELLA in Moodle, refer to the *EQUELLA Moodle Configuration Guide*.

Please note that this guide has been developed using EQUELLA version 6.4 (GA) and Moodle version 2.9 and as such may differ in appearance to your own installation. Contact your system administrator for access to extra features or to reconfigure your installation.

## Moodle homepage

### Login to Moodle

1. Log in to Moodle to display the Moodle homepage. An example is shown in Figure 1.

The screenshot shows the Moodle homepage with the EQUELLA Documentation block integrated. The block displays a list of courses:

- Photography 101**: Teacher: Admin User, Introduction to photography and its key methodologies.
- Science - physiology**: Teacher: Admin User
- The study of science across the last 2 centuries - SCI101**: Teacher: Admin User, This course looks at the sciences and how the many theories across many sciences have changed in the last 2 centuries.
- EQUELLA 201**: Teacher: EQUELLA Demo, An course to introduce administrators to EQUELLA and its administrative functions.

The Moodle interface includes a navigation bar, administration sidebar, and a calendar in the top right corner.

**Figure 1** Moodle homepage

# EQUELLA Blocks

Administrators can set up three types of blocks in Moodle, the **EQUELLA Search** block, **EQUELLA Tasks** block and **EQUELLA Links** block, to take information from EQUELLA and display it in a convenient portlet on the Moodle Course pages.

For information on how to add EQUELLA blocks to Moodle, please refer to the *EQUELLA Moodle Configuration Guide*.

## **EQUELLA Search block**

This block offers users a quick way of searching the EQUELLA repository to view resources. (*NOTE: Resources cannot be added to a Moodle course from an EQUELLA Search block.*)

### To use the EQUELLA Search block

1. Click the **Search EQUELLA** link inside the EQUELLA Search Block. An example of a Moodle course with the EQUELLA Search block enabled is shown in Figure 2.

The screenshot shows a Moodle course page for 'Science - physiology'. On the left, there's a navigation sidebar with links like 'Home', 'Site pages', 'Current course' (which is expanded to show 'SCPH'), 'Participants', 'Badges', 'General', '19 March - 25 March', '26 March - 1 April', '2 April - 8 April', '9 April - 15 April', '16 April - 22 April', '23 April - 29 April', '30 April - 6 May', '7 May - 13 May', '14 May - 20 May', '21 May - 27 May', 'My courses', 'ADMINISTRATION' (with 'Course administration'), and 'Upcoming events'. The main content area displays several event blocks: '19 March - 25 March' (with files 'Hogarth Falls.jpg' and 'TheMeaningOfLife.zip'), '26 March - 1 April', '2 April - 8 April', '9 April - 15 April' (with files 'Broiling.zip' and 'Hunting Dog'), and '16 April - 22 April'. To the right of these blocks is the 'EQUELLA SEARCH' block, which contains a search input field and a red-bordered 'Search EQUELLA' button. At the top right of the page, there's a 'Turn editing on' button and a user profile icon labeled 'Admin User'.

**Figure 2** Moodle Course page—EQUELLA Search block

2. An EQUELLA Search page displays inside Moodle with a **Search for** text box and a **Search** button, as shown in Figure 3.

The screenshot shows the 'Science - physiology: EQUELLA Search' block on a Moodle page. The navigation bar includes 'Documentation' and 'Admin User'. The left sidebar has sections for 'NAVIGATION' (Home, Dashboard, Site pages, Current course, SCPH: Participants, Badges, General, dates), 'ADMINISTRATION' (Course administration, Turn editing on, Edit settings, Users), and 'SEARCH' (Search for: 'equella', Search button). The main content area displays the search results.

**Figure 3 EQUELLA Search block main page**

3. Enter a search query in the **Search for** box and click **Search** or press **Enter**.
4. Matching search results returned from the EQUELLA repository display. An example is shown in Figure 4. Relevant resource attachments matching the search query are also returned.

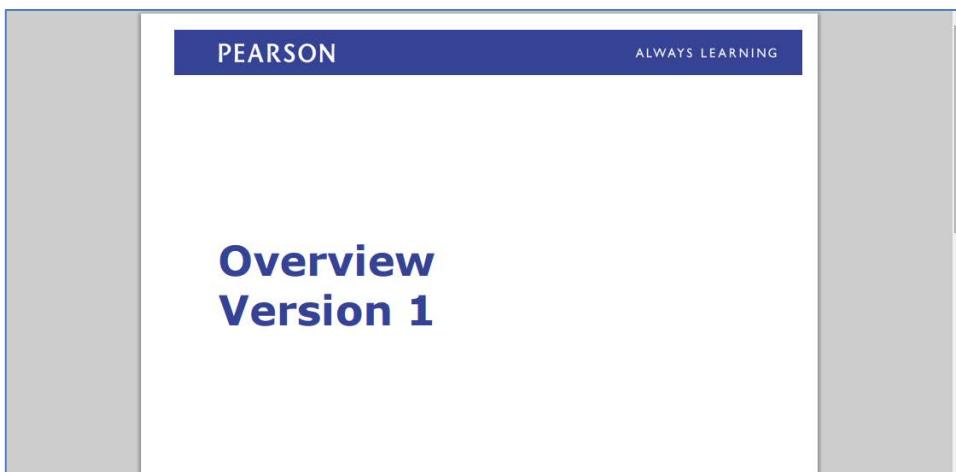
The screenshot shows the search results for 'equella'. The search bar now contains 'equella'. The results table lists 10 items:

Title	Description	Filename	Action
EQUELLA Features	An overview of the features of EQUELLA	Content Exchange Video Script.doc	<a href="#">View</a>
EQUELLA Overview	A document outlining EQUELLA functionality.	Overview.pdf	<a href="#">View</a>
Introduction to EQUELLA	This resource introduces the user to EQUELLA and includes the Features Overview, a screen shot of the EQUELLA Dashboard, and links to the EQUELLA video on YouTube and the website.	EQUELLA Dashboard.png	<a href="#">View</a>
Introduction to EQUELLA	This resources introduces the user to EQUELLA and includes the Technical Requirements, Features Guide and and links to the EQUELLA video on YouTUBE and the website.	EQUELLA Features Guide.pdf	<a href="#">View</a>

**Figure 4 EQUELLA Search block search results**

5. Click the **View** link beside the resource you wish to view.

The result will load as if being accessed directly. '*Overview.pdf*' resource being displayed is shown in Figure 5.



**Figure 5 Viewing attachment via EQUELLA Search block**

## EQUELLA Tasks

This block displays information relating to a user's moderation tasks or notifications. It is typically used by contributor and moderator users to note any resources requiring their attention.

The EQUELLA Tasks block lists both the tasks and notifications applicable to the user in EQUELLA. Tasks are filtered with regard to their 'assigned' status, and the count of results inside these queries is displayed. Notifications are also listed here, grouped by the type of notification.

Where there are currently tasks or notifications applicable to the user, the Tasks block will be populated with a link to the task list in EQUELLA (i.e. '*All Tasks*' in Figure 6).

Each task will match a certain task filter, and a link to the filtered task list in EQUELLA will be displayed (i.e. '*Unassigned tasks*' in Figure 6), alongside a count of the number of tasks matching this filter.

### To use the EQUELLA Tasks block

1. Click the name of the task filter you wish to view. An example of the EQUELLA Tasks block is shown in Figure 6.

The screenshot shows a Moodle course page for 'Science - physiology'. On the left, there's a navigation sidebar with links like 'Home', 'Dashboard', 'Site pages', 'Current course' (which is expanded to show 'SCPH'), 'Participants', 'Badges', 'General', and 'My courses'. Below this are 'Recent activity', 'Latest news', and 'Upcoming events'. The main content area has a 'Turn editing on' button at the top right. A 'SEARCH FORUMS' block is present. The central part of the page displays several time-based sections: '19 March - 25 March' containing files 'Hogarth Falls.jpg' and 'TheMeaningOfLife.zip'; '26 March - 1 April'; '2 April - 8 April'; '9 April - 15 April'; '9 April - 15 April'; '9 April - 15 April' (this section is highlighted with a red box); '2 April - 8 April'; and '26 March - 1 April'. At the bottom right is an 'EQUELLA SEARCH' block with a search bar and a 'Search EQUELLA' button. The 'EQUELLA TASKS' block on the right side is also highlighted with a red box and contains the following information: 'All Tasks - 5', 'Tasks assigned to me - 1', 'Tasks assigned to others - 1', 'Unassigned tasks - 3', 'All notifications - 1', and 'Resources that were rejected - 1'.

**Figure 6 Moodle Course page - EQUELLA Tasks block**

2. The **EQUELLA My Tasks** page displays in native EQUELLA, with the appropriate filtering applied. An example is shown in Figure 7.

The screenshot shows the 'My tasks' page in native EQUELLA. The left sidebar includes links for 'Dashboard', 'Favourites', 'My resources', 'Search', 'Contribute', 'Browse resources by format...', 'Training documentation', 'Research repository resources', 'Teaching resources', 'More...', 'Manage tasks', 'Manage external resources', and 'Manage resources'. The main content area is titled 'My tasks' and shows a search bar with 'Enter search terms...'. Below it is a table with three rows of task details:

Results	1 to 5 of 5	Sort	Filter	Share
Social studies	An overview of social studies	Status: Moderating   Last updated 8 August 2014 3:26 PM Moderating since: 8 August 2014 3:26 PM Workflow: Basic workflow Task: Editorial Time at this task: 9 months Priority: Normal	Moderation progress	<span style="color: green;">Moderate</span>
Sociology	A lecture about how the study of sociology fits in today's society.	Status: Moderating   Last updated 8 August 2014 3:24 PM Moderating since: 8 August 2014 3:24 PM Workflow: Basic workflow Task: Editorial Time at this task: 9 months Priority: Normal	Moderation progress	<span style="color: green;">Moderate</span>
Physiology - changes over time	A paper with changes			

**Figure 7 EQUELLA My tasks page**

## EQUELLA Links

The **EQUELLA Links** block is configured by administration, and enables links to specific native EQUELLA pages to be accessed. An example is a link to the Contribution page in EQUELLA. An administrator can configure a link by providing a name (e.g. *Contribute EQUELLA resource*) and the relevant EQUELLA URL. (See the *EQUELLA Moodle Configuration Guide* for further details on configuring EQUELLA Links.)

Clicking on the link will take the user to the specified URL page. An example of an EQUELLA Links block with a link to the EQUELLA Contribute page is shown in Figure 8.

The screenshot shows a Moodle course page titled "Science - physiology". On the left, there's a navigation sidebar with links like "Home", "Dashboard", "Site pages", "Current course", and "SCPH". The main content area displays several weekly outlines: "19 March - 25 March" (with files "Hogarth Falls.jpg" and "TheMeaningOfLife.zip"), "26 March - 1 April", "2 April - 8 April", and "9 April - 15 April". On the right, there are several blocks: "Turn editing on", "SEARCH FORUMS" (with a search bar and "Go" button), "EQUELLA LINKS" (with a red box around it and a link to "Contribute EQUELLA resource"), "EQUELLA TASKS" (listing tasks assigned to me, others, and notifications), and "EQUELLA SEARCH" (with a search bar).

**Figure 8 EQUELLA Links block**

Clicking the link takes the user to the relevant EQUELLA page. An example using the **Contribute EQUELLA resource** link is shown in Figure 9.

The screenshot shows the EQUELLA "Contribute" page. At the top, there's a header with the EQUELLA logo and a "LOG OUT" button. The main content area asks "What type of resource are you contributing?". It lists several categories: "Demonstration" (Books, eReserve articles, Journals), "eReserve resources" (Records for eReserve book holdings, eReserve journal holdings), "Learning resources" (General learning resources, MERLOT), and "Teaching resources" (LTI Collection, LTI resources). The "Journals" section is highlighted in yellow.

**Figure 9 EQUELLA Contribute page accessed from EQUELLA Links block**

## Accessing the EQUELLA repository

Resources stored in the EQUELLA repository can be added to any user-editable Moodle course.

1. Select an appropriate course (e.g. *Science - Physiology*) from the **My courses** pane to display the **Weekly outline** page. An example is shown in Figure 10.

The screenshot shows the Moodle weekly outline page for a course titled "Science - physiology". The left sidebar includes links for "Recent activity", "Latest news", and "Upcoming events". The main content area displays a weekly outline from March 19 to April 15, 2013. Each week section contains a "News forum" link and a "Turn editing on" button. To the right of the weekly sections are various Moodle modules: "SEARCH FORUMS", "EQUELLA LINKS", "EQUELLA TASKS", and "EQUELLA SEARCH". The top right corner shows the user is "Admin User".

**Figure 10 Weekly outline page**

### To activate editing features

1. Select **Turn editing on** by clicking the **Turn editing on** button in the top right-hand corner of the page to display editing features. An example is shown in Figure 11. (*Note: When editing is turned on, the button changes to Turn editing off.*)

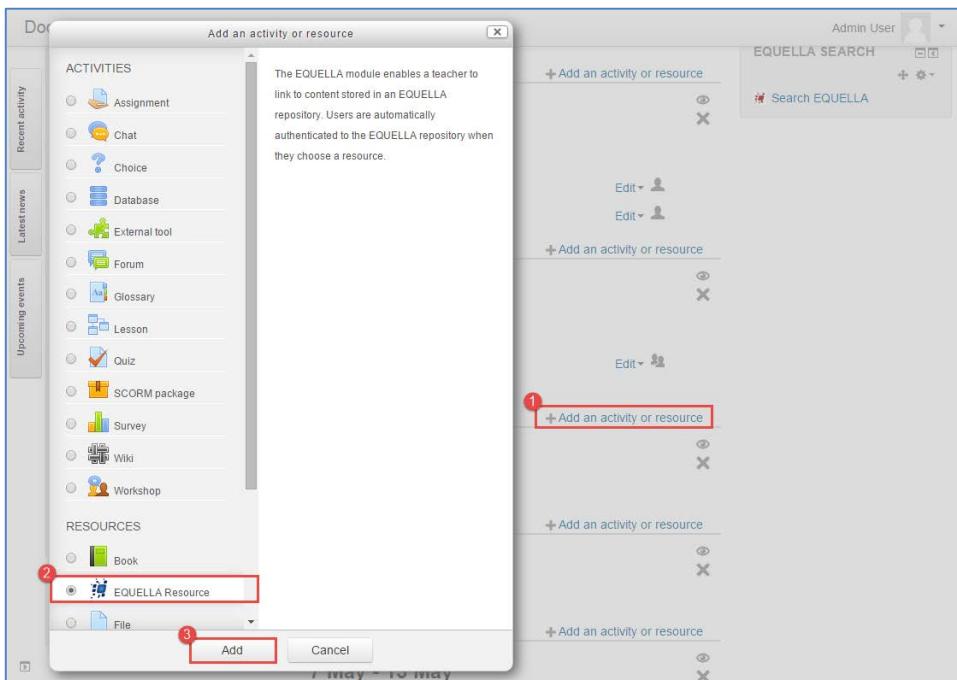
This screenshot is identical to Figure 10, but the "Turn editing on" button has been clicked, changing it to "Turn editing off". The "Edit" and "Delete" icons next to each item in the weekly outline sections are now visible, indicating that editing features are active.

**Figure 11 Weekly outline page—editing turned on**

## Accessing the EQUELLA Integration page

To add an EQUELLA resource to a course

1. Click on the **+Add an activity or resource** link from the general course pane or a specific week, select **EQUELLA Resource** from the RESOURCES sections, then click **Add**. An example is shown in Figure 12.



**Figure 12 Add an activity or resource page**

The **EQUELLA Integration** page displays, as shown in Figure 13.

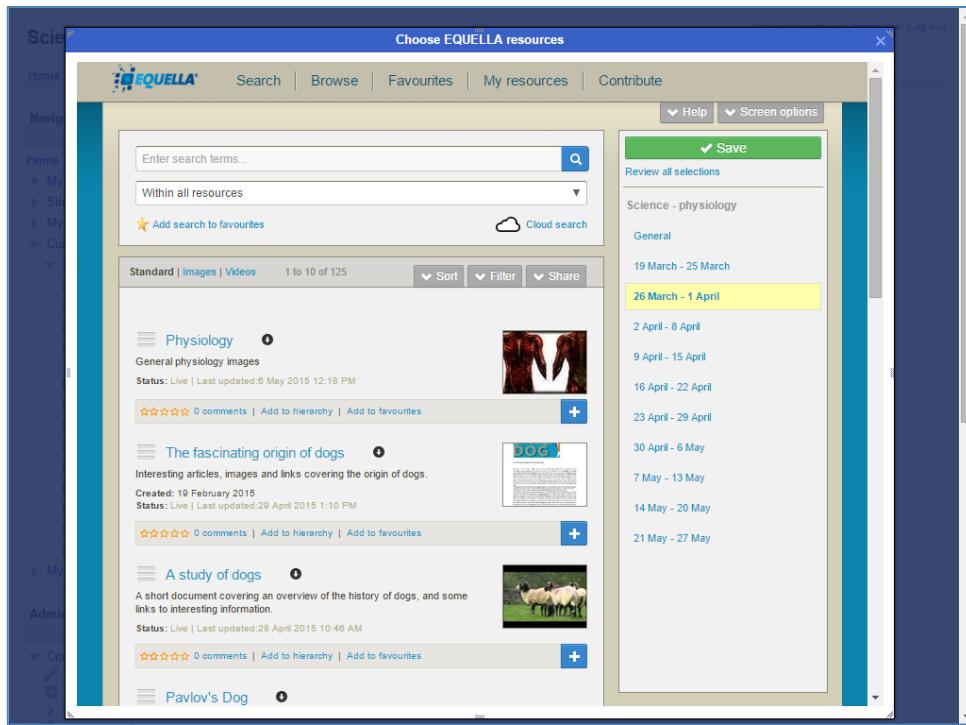


Figure 13 EQUELLA Integration page

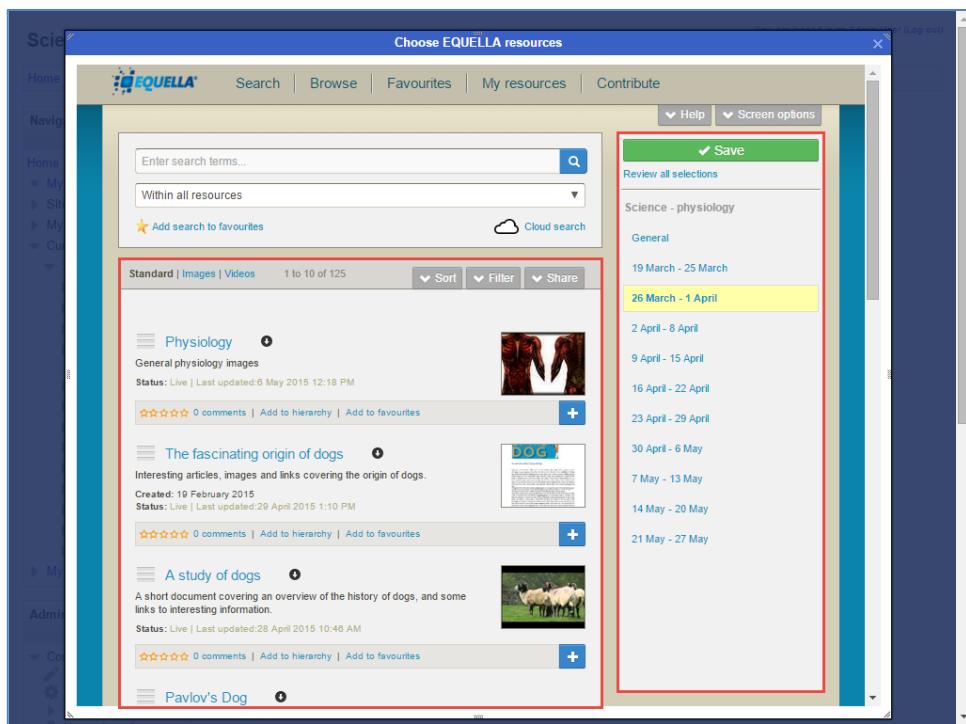
## EQUELLA Integration page

The EQUELLA Integration page includes the following features:

- The ability to search for resources, including:
  - Entering search terms
  - Restricting searches to specific collections
  - Browsing hierarchies
  - Viewing favourites
  - Viewing the My resources page
- The ability to sort and filter.
- The ability to contribute resources using standard contributions or Quick contribute.
- The ability to Add favourites, save searches, share searches and edit resources.
- The ability to add resources to the Moodle course location using either the + button or by dragging and dropping resources to the relevant location.
- The ability to view and edit selections before saving.

## EQUELLA Integration page elements

For the Search, Browse, Favourites and My Resources pages, the integration screen is made up of the **Search/Results panel** and the **Moodle panel**. An example is shown in Figure 14.



**Figure 14 Integration screen – Search/Results and Moodle panels**

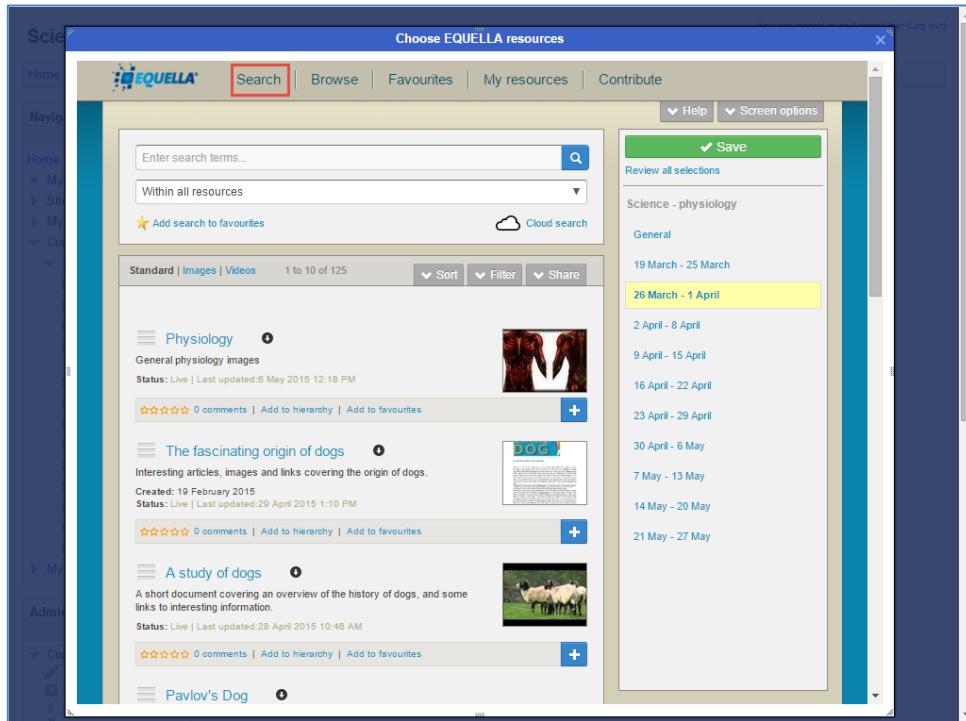
- Links are listed along the top of the screen, and can be selected to change the page view. Available pages are:
  - **Search** (default) – see [Search](#) on page 13 for further details.
  - **Browse** – see [Browse](#) on page 20 for further details.
  - **Favourites** – see [Favourites](#) on page 21 for further details.
  - **My resources** – see [My resources](#) on page 24 for further details.
  - **Contribute** – see [Contribute](#) on page 25 for further details.
- The Search/Results panel has relevant search options for each page, and the *Results box* underneath.
- The Moodle panel shows the Course title, and lists the Course locations. The course location that the EQUELLA Integration page was accessed from is highlighted and bolded. EQUELLA resources are selected and added to course locations during the selection session. Selections can be previewed before they are saved to the Moodle course locations by clicking the course location or clicking the [Review all selections](#) link.

## EQUELLA Integration pages

### Search

The **Search** page enables users to search all resources, a specific collection or an advanced search. Additionally, users can search the Cloud (OER) for matching results. The **Search** page is the default display option when the integration screen opens, but can

be accessed from other pages by clicking the **Search** link at the top of the page. An example is shown in Figure 15.



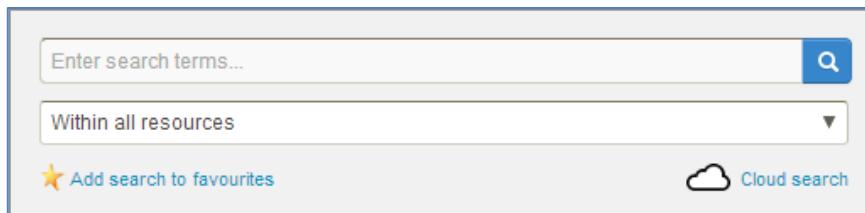
**Figure 15 Integration screen - Search link**

The **Search** page displays the **Search box** above the **Results box**.

The **Search** box comprises:

- a basic keyword search field
- Within drop-down to filter results by collection or advanced search (see [Search by collection](#) on page 15 and [Advanced search](#) on page 16 for further information).
- Add search to favourites link – opens the Add search to favourites dialog (see [Adding or removing favourite resources](#) on page 22 for further information).
- Cloud search link – allows users to search the Cloud (OER content). (*NOTE: This option may not be enabled for all integrations.*)

An example of the Search box is shown in Figure 16.



**Figure 16 Search box**

## To search for a resource

1. Enter keyword/s (e.g. *physiology*) in the search field.

2. Select a suggestion or click **Search** to return matching results. The matching results from the EQUELLA repository are displayed (local results). An example is shown in Figure 17.

The screenshot shows the 'Choose EQUELLA resources' window. At the top, there's a search bar with 'physiology' and a dropdown menu set to 'Within all resources'. Below the search bar, it says 'Found 6,097 cloud results'. The main area displays two search results under 'Standard' view:

- Physiology**: General physiology images. Status: Live | Last updated: 6 May 2015 12:18 PM. Relevance: 5.201. It includes a thumbnail image of a human torso.
- Physiology - overview**: An overview of the basics of physiology. Created: August 11, 2014. It also includes a thumbnail image of a human torso.

To the right, a sidebar titled 'Review all selections' shows a list of scheduled tasks:

- ✓ Save
- Science - physiology
- General
- 19 March - 25 March
- 26 March - 1 April (highlighted in yellow)
- 2 April - 8 April
- 9 April - 15 April
- 16 April - 22 April
- 23 April - 29 April
- 30 April - 6 May
- 7 May - 13 May

**Figure 17 Search results**

The number of search results viewable on the current page is displayed alongside the total number of matching results.

Search results can be sorted and filtered. See the [Search results – Standard view](#) section on page 31 for more information.

## 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.

### To search within a specific collection

1. Click the **Within** drop-down to display the available search categories. An example is shown in Figure 18.

The screenshot shows the 'Within' dropdown menu. It has a red box around the 'Collections' section. The menu items are:

- Enter search terms...
- Within all resources
- Collections
  - Within all resources
  - Books
  - eReserve articles
  - Journals
  - Learning resources
  - LTI Collection
  - Teaching resources
- Advanced searches
  - Learning resources advanced search
  - eReserve

**Figure 18 Within drop-down – Collections**

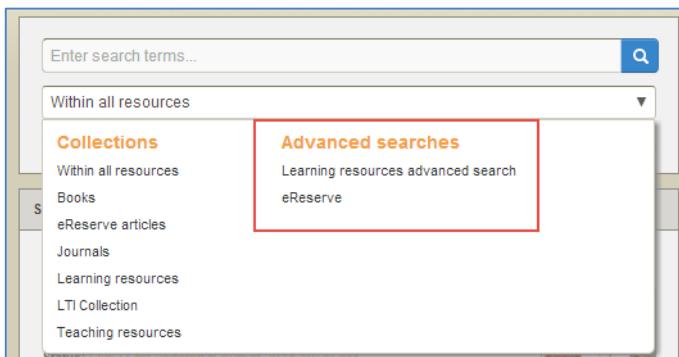
2. Select the required Collection to display only resources belonging to that collection.

## Advanced search

An advanced search provides a means of searching specifically within the metadata (information) associated with a resource. It makes searching for a particular resource easier, and can be targeted to specific users, groups or roles.

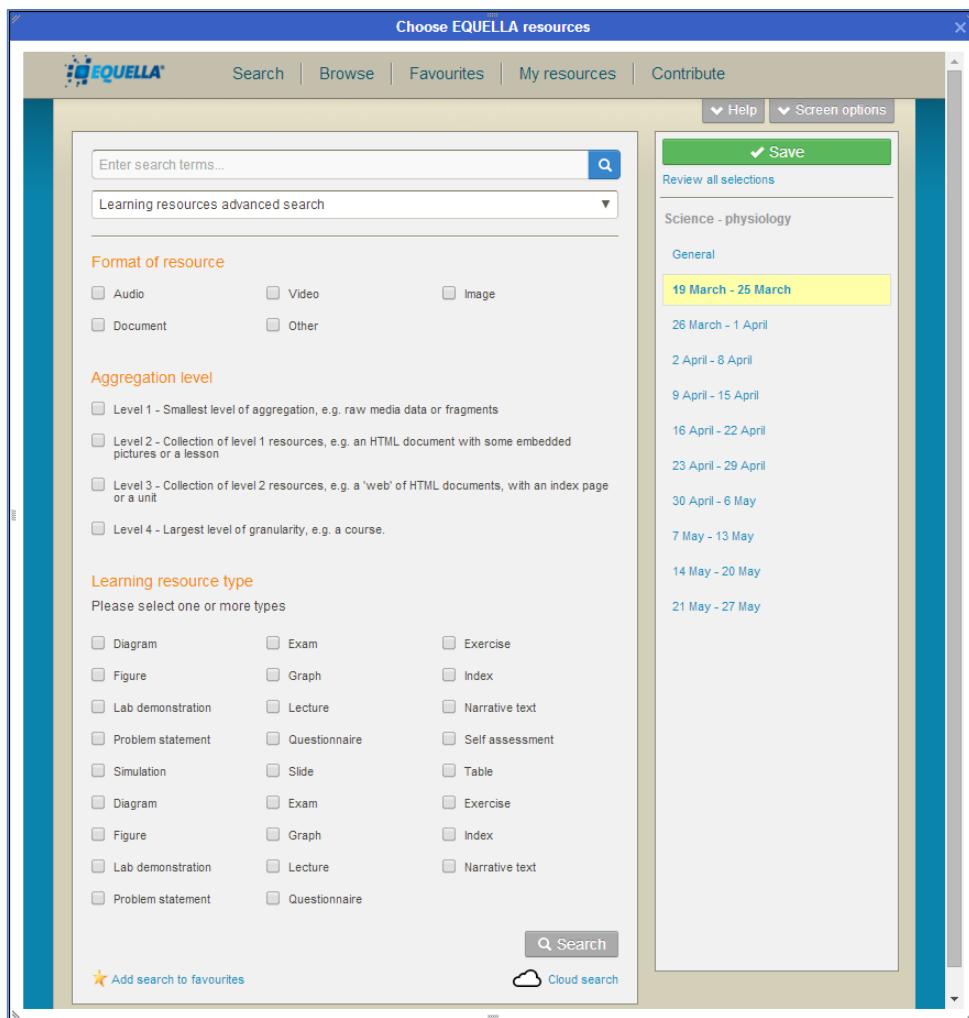
### To conduct an advanced search

1. Click the **Within** drop-down to display the available search categories. An example is shown in Figure 19.



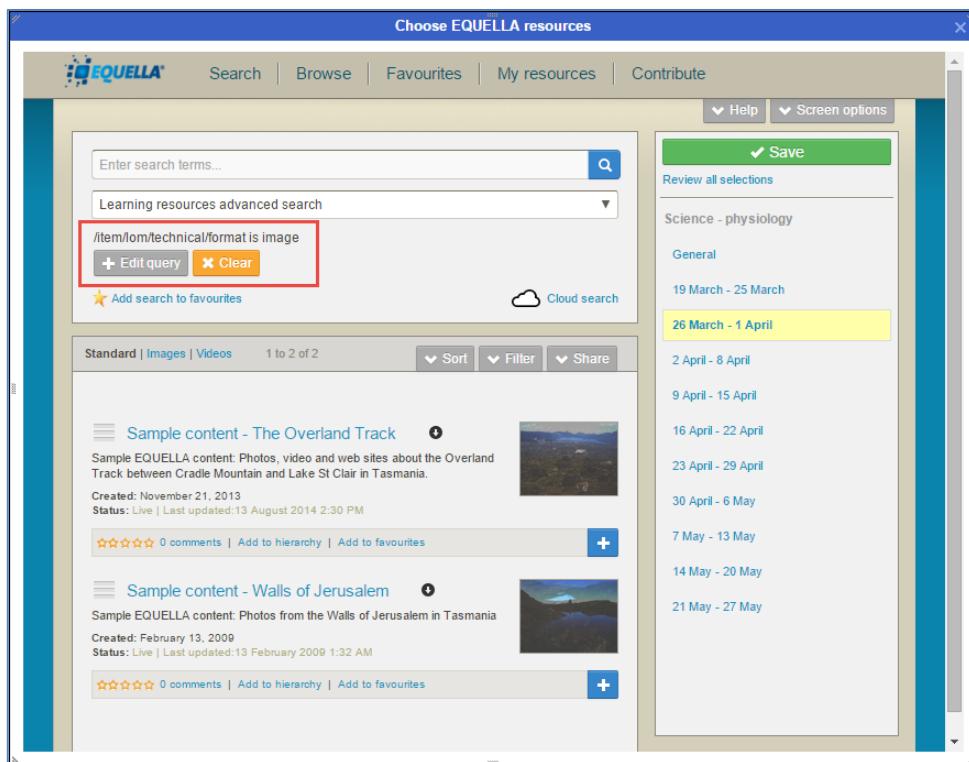
**Figure 19 Within drop-down - Advanced searches**

2. Select an advanced search (e.g. *Learning resources advanced search*) from the **Advanced searches** list. The advanced search criteria page displays. An example is shown in Figure 20.



**Figure 20 Advanced search criteria page**

3. Select criteria (e.g. click **Image** in the **Format of resource** section) and click **Search** at the bottom of the criteria page to display the search results page with search criteria in place. An example is shown in Figure 21.



**Figure 21 Advanced Search criteria in place**

Additional advanced search information and buttons are added to the **Search** pane, as shown in Figure 21.

4. Select **+ Edit query** from the search pane to open the advanced search criteria page and change or refine the search criteria, or **X Clear** to remove the criteria.

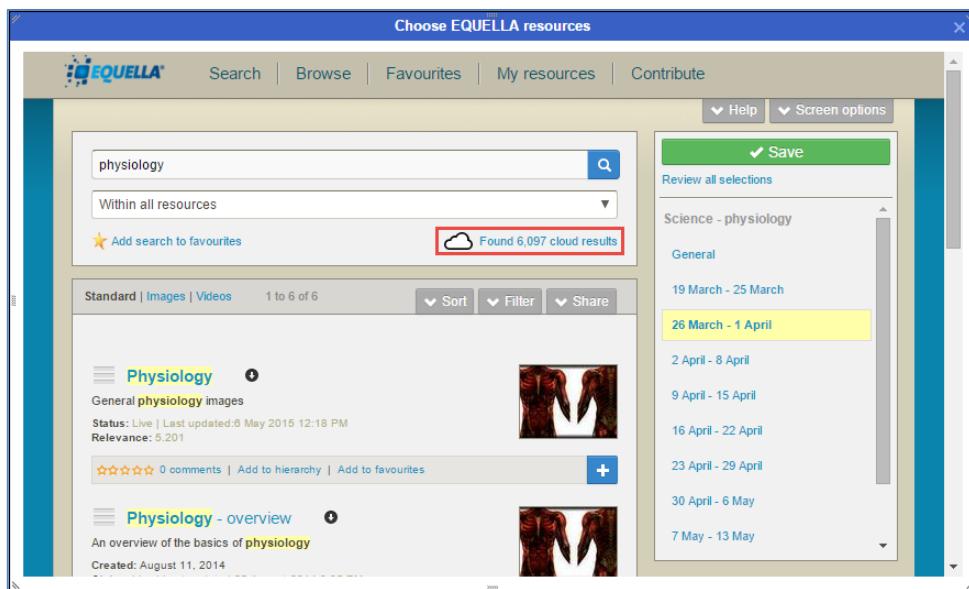
See the *EQUELLA Advanced Search Configuration Guide* for information on creating advanced searches.

## Cloud searching

The Cloud search (when enabled) occurs simultaneously with the standard EQUELLA search and searches the OER repository in the cloud. When a search term is entered on an EQUELLA search page and matching items are located in the cloud, the user can easily view and select cloud content in addition to local EQUELLA content.

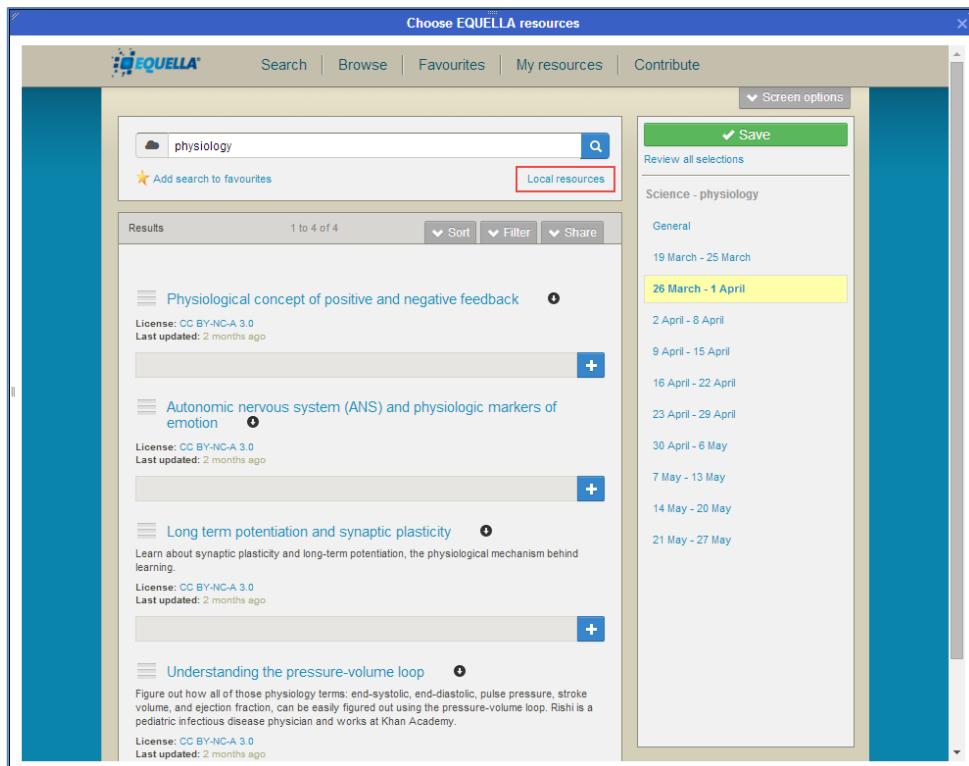
### To view Cloud results

1. Once a search has been performed, from the results page click the **Found x cloud results** link in the bottom-right of the **Search box** to view the matching OER results. An example is shown in Figure 22.



**Figure 22 Cloud results link**

2. Click the **Local resource** link to return to the local resource results. An example is shown in Figure 23.



**Figure 23 Cloud results with Local resources link**

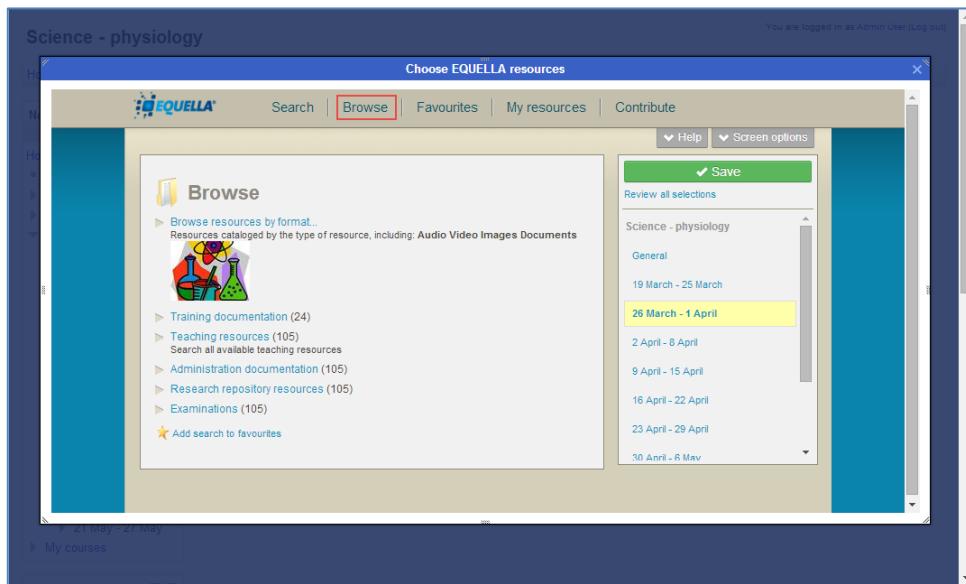
See the *EQUELLA Searching User Guide* for more information on searching.

## Browse

The Browse view enables users to browse the EQUELLA repository using pre-defined hierarchy topics.

### To Browse EQUELLA resources

1. Select the **Browse** link from the top of the page. An example is shown in Figure 24.



**Figure 24 Integration page - Browse view**

2. Select the required hierarchy topic/subtopic to view results.

When drilling down into hierarchy sub-topics, use the breadcrumbs to move back to higher-level sub-topics. An example is shown in Figure 25.

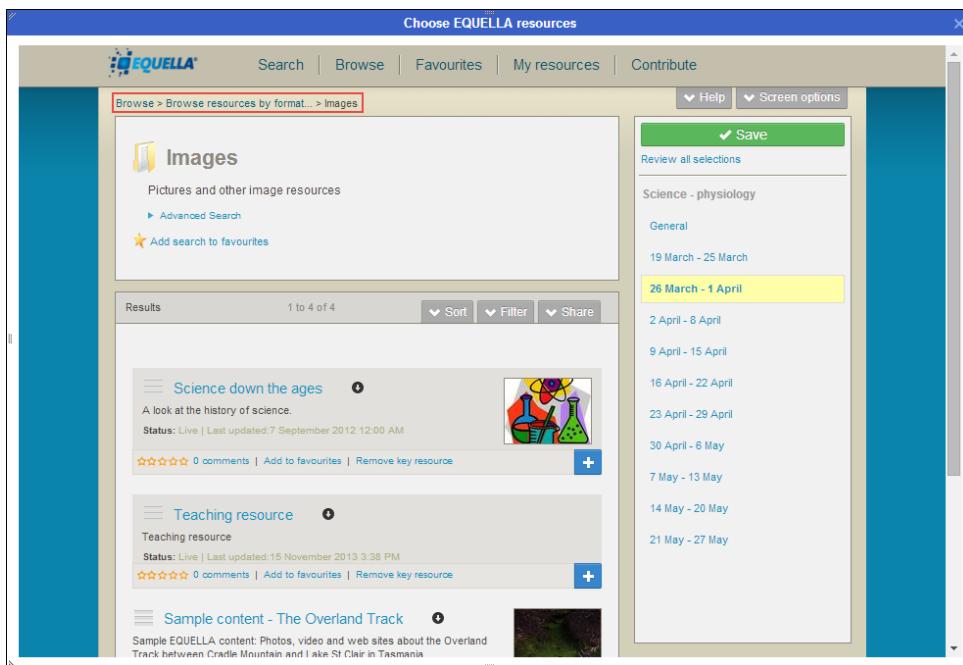


Figure 25 Browse page - hierarchy breadcrumb

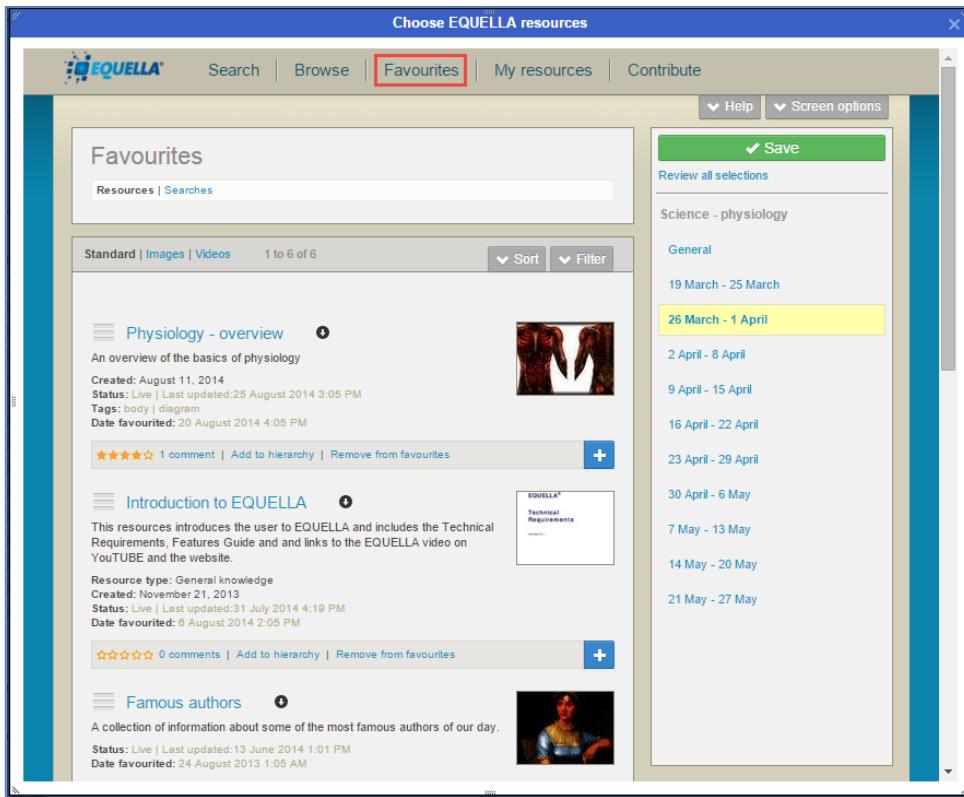
## Favourites

The **Favourites** view displays resources or searches that have been marked as favourites by the logged on user.

### Viewing favourite resources

To view the Favourites (Resources) page

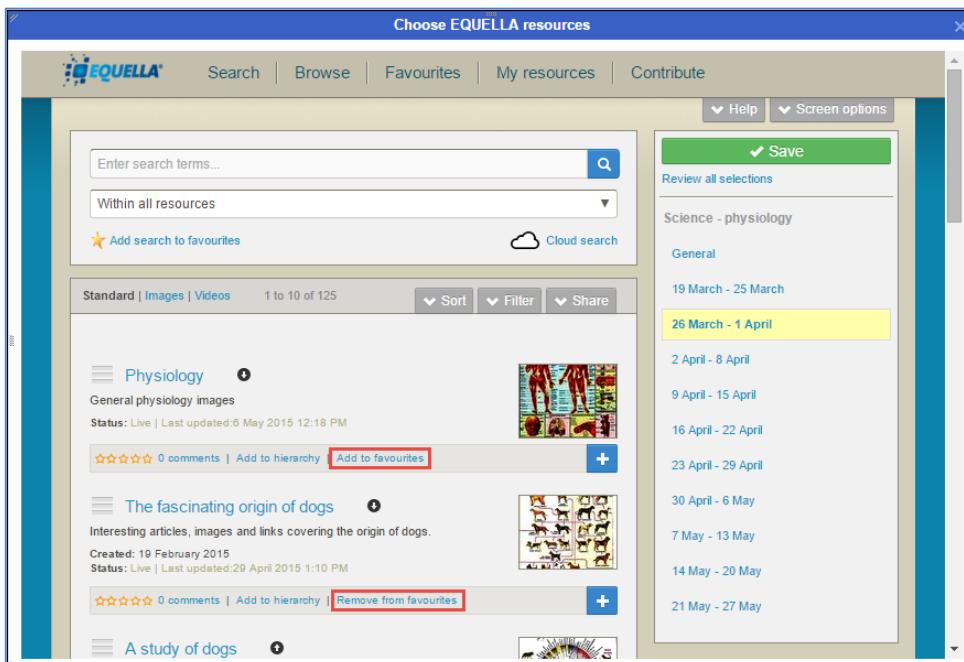
1. Select the **Favourites** link from the top of the page. The Favourites page opens and favourite resources display as the default. An example is shown in Figure 26.



**Figure 26 Favourites view – Resources**

## Adding or removing favourite resources

Resources can be added to or removed from *Favourites* by clicking the **Add to favourites** link or **Remove from favourites** link from the search results page. An example is shown in Figure 27.



**Figure 27 Add to/Remove from favourites links**

## Viewing favourite (saved) searches

To view favourite (saved) searches

1. Select the **Favourites** link from the top of the page. The Favourites page displays showing favourite resources.
2. Click the **Searches** link at the top-left of the **Favourites** page to view saved searches. An example is shown in Figure 28.

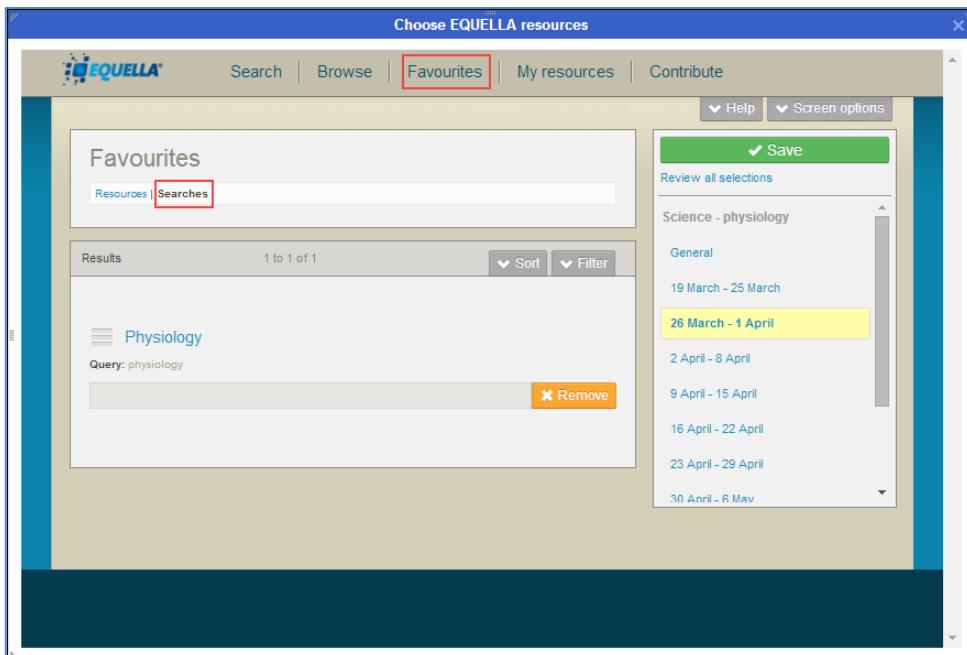


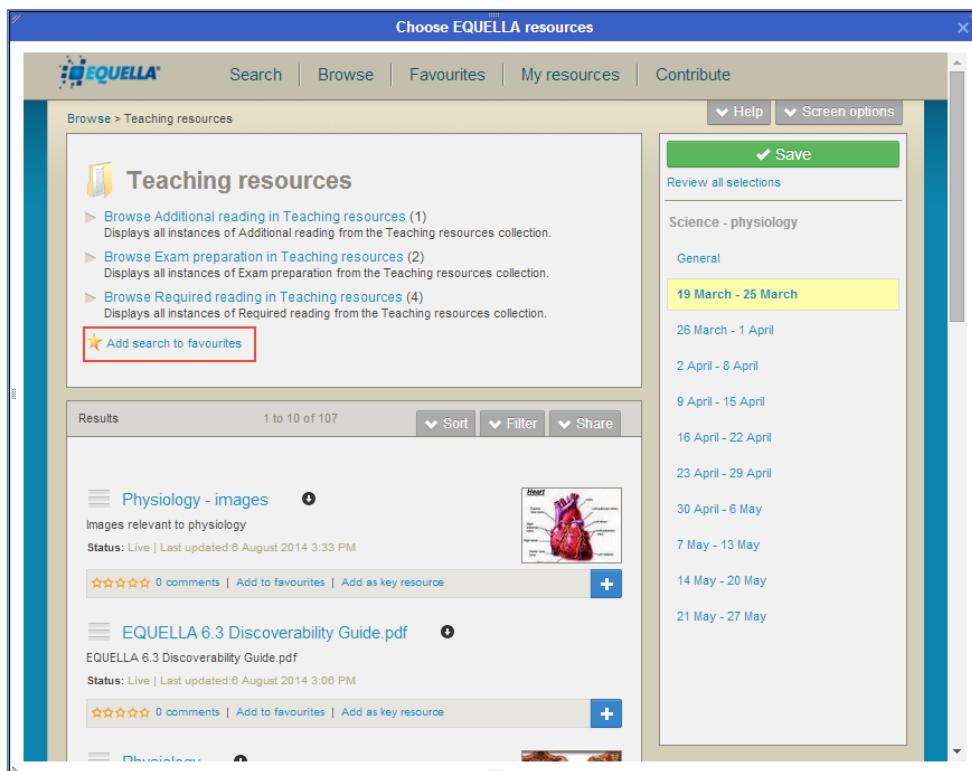
Figure 28 Favourites - Searches page

## Saving favourite searches

Useful searches can be saved as favourites by users.

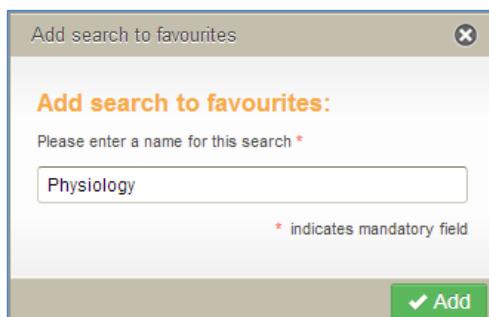
To add a search to favourites

1. Run the required search, then click the **Add search to favourites** link found in the **Search box** on the *Search, Browse and My resources* pages. An example is shown in Figure 29.



**Figure 29 Browse page - Add search to favourites link**

2. The **Add search to favourites** dialog displays. An example is shown in Figure 30.



**Figure 30 Add search to favourites dialog**

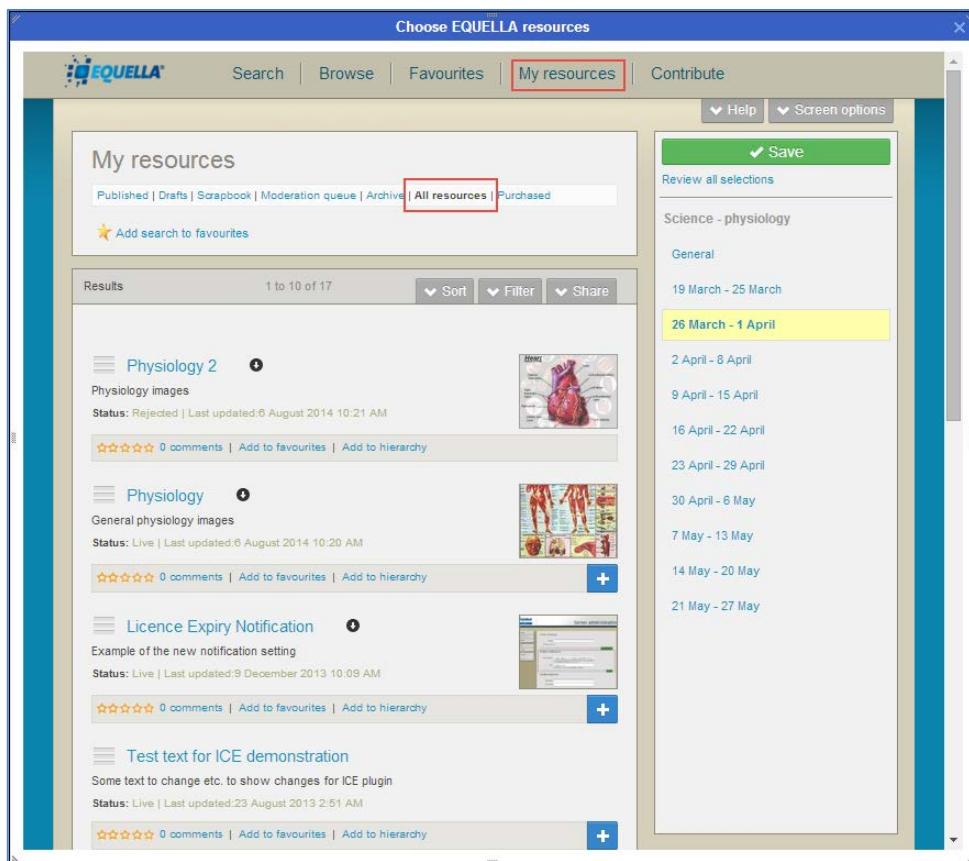
3. Enter a name for the search, then click **✓ Add**. The search now displays on the **Favourites – Searches** page, as shown in Figure 28.

## My resources

The **My resources** page enables the logged-in user to view and select the EQUELLA resources which they own in one place, including resources with statuses other than *Live*.

### To view My Resources

1. Select the **My resources** link from the top of the page. The **My resources** page displays. An example is shown in Figure 31.



**Figure 31 My resources page - All resources view**

This page includes the following views:

**Published** – resources that have a status of *Live*, that can be selected for Moodle courses.

**Drafts** – resources that have a status of *Draft*, that are the user's works in progress (i.e. haven't yet been published or added to moderation). Not available for course selection.

**Scrapbook** – the function where users can upload files or create HTML pages to be added to EQUELLA resources.

**Moderation queue** – resources that are currently in moderation.

**Archive** – resources with a status of *Archived*. Not available for course selection.

**All resources** – shows all resources, regardless of status. Only those with a status of *Live* can be selected for courses.

**Purchased** – only relevant to institutions using the *EQUELLA Content Exchange*.

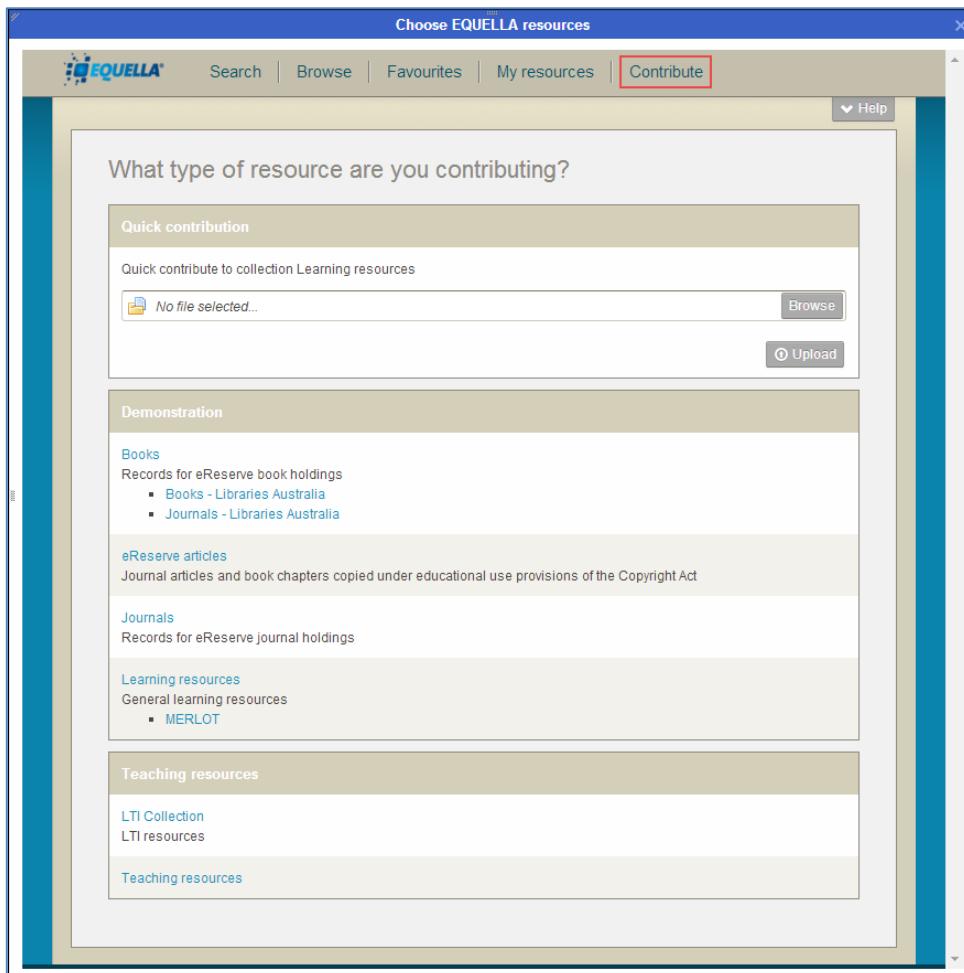
See the *EQUELLA My Resources User Guide* for further information.

## Contribute

The **Contribute** page provides the ability to create a new EQUELLA resource that can then be selected and added to a Moodle course (depending on the moderation process required prior to a resource '*going live*').

## To view Contribute page

Select the **Contribute** link from the top of the page. The **Contribute** page displays. An example is shown in Figure 32.



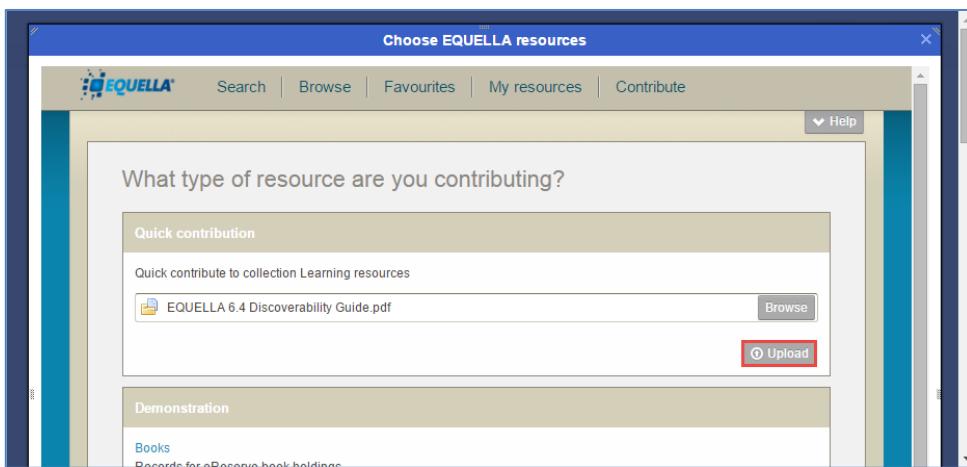
**Figure 32 Contribute page**

Users can select from the Quick contribute pane (which uploads a file, using the file name as the resource title and description in the EQUELLA repository) or a standard collection.

## Quick contribution

To create a new EQUELLA resource using Quick contribution

1. Select the **Contribute** link from the integration screen. The Contribute page displays. An example is shown in Figure 32.
2. In the **Quick contribution** panel, click **Browse** and locate and **Open** the required file.
3. Click **Upload**. An example is shown in Figure 33.



**Figure 33 Quick contribute - Upload a file**

The file is automatically added to the Moodle course location the Integration screen was accessed from. An example is shown in Figure 34.

A screenshot of a Moodle course page titled 'Science - physiology'. The course navigation sidebar shows sections like Home, Site pages, Current course, and SCPH. The main content area displays three weekly schedule blocks: '19 March - 25 March', '26 March - 1 April', and '2 April - 8 April'. In the '19 March - 25 March' block, there are several files listed, including 'Hogarth Falls.jpg', 'TheMeaningOfLife.zip', and 'EQUILLA 6.4 Discoverability Guide.pdf'. The 'EQUILLA 6.4 Discoverability Guide.pdf' file is highlighted with a red rectangle. To the right of the course content, there are several Moodle blocks: 'SEARCH FORUMS', 'EQUILLA LINKS' (which contains a link to 'Contribute EQUILLA resource'), 'EQUILLA TASKS' (showing 5 tasks), and 'EQUILLA SEARCH'.

**Figure 34 Moodle course with Quick contribution file added**

Additionally, the file has been added into EQUILLA with the file name as the title and description. An example is shown in Figure 35.

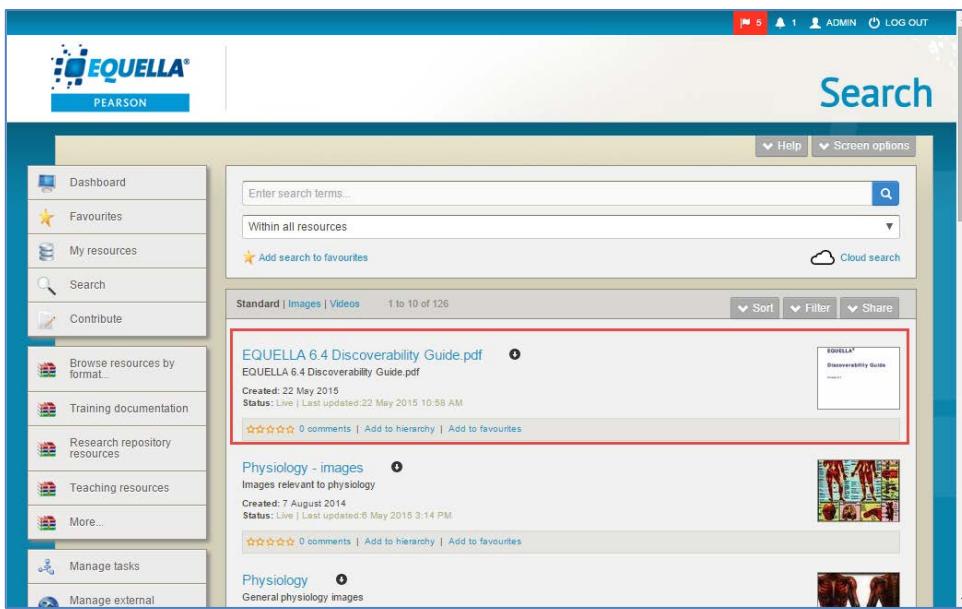
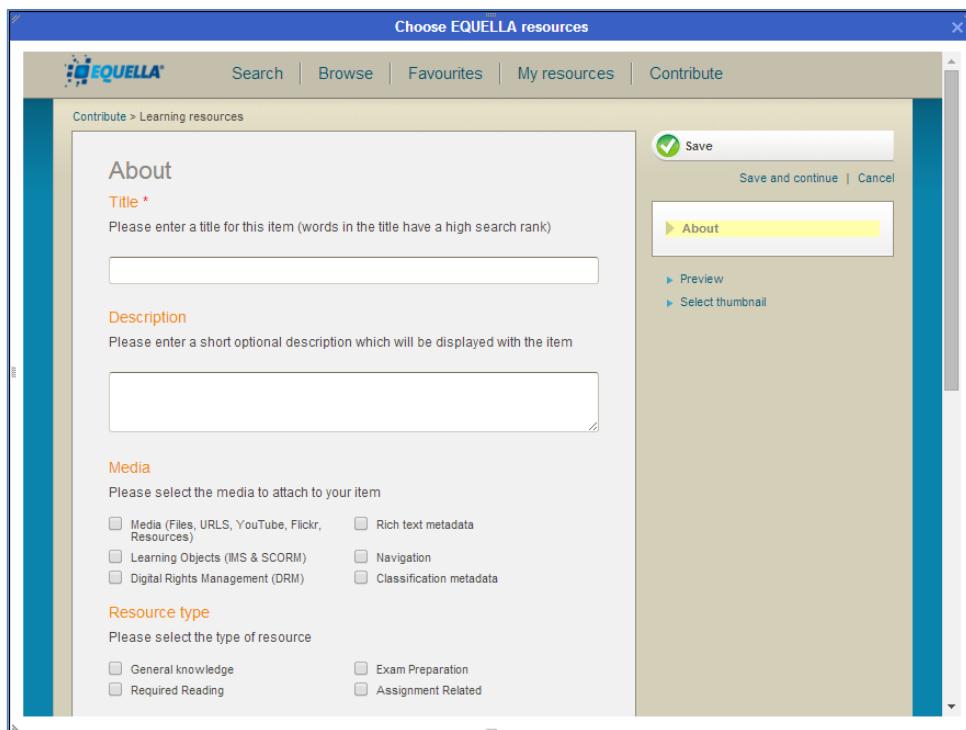


Figure 35 Quick contribution as appears in EQUELLA repository

## Standard contribution

### To contribute a new EQUELLA resource

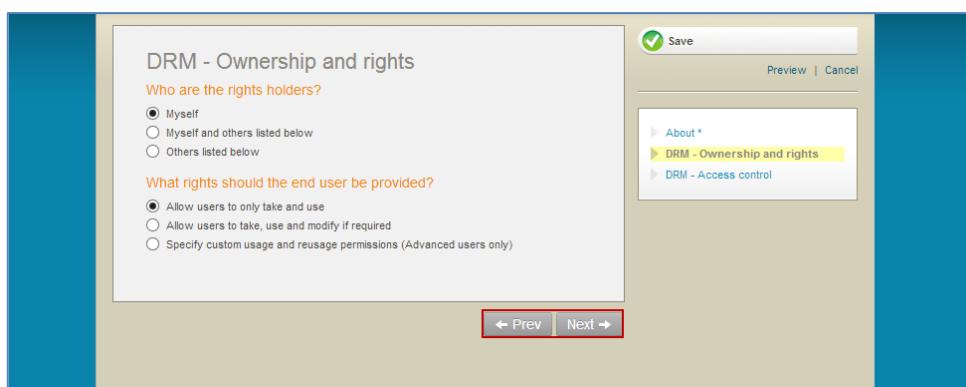
1. Select the **Contribute** link from the integration screen. The Contribute page displays. An example is shown in Figure 32.
2. Select a collection (e.g. *Learning resources*) from the list of collections to display a contribution wizard that will guide the user through the contribution process. An example is shown in Figure 36. Wizard controls will differ for each collection.



**Figure 36 Example contribution wizard**

Contribution wizard elements can include:

- **Save**—click the button to save the resource.
- **Preview**—select this link to view the current and previous versions of the resource.
- **Cancel**—select this link to exit the contribution wizard.
- **Next ➔** and **⬅ Prev**—use these buttons to navigate between multiple wizard pages. An example is shown in Figure 37.



**Figure 37 Next and previous buttons in contribution wizard**

- **Pages** pane—lists the wizard pages. Select the page name link to move to that page. An example is shown in Figure 38.



**Figure 38 Pages pane**

3. Enter all required information relating to the resource being contributed. Fields marked with an asterisk (\*) are mandatory fields.
4. Add attachments to the resource using the controls provided.

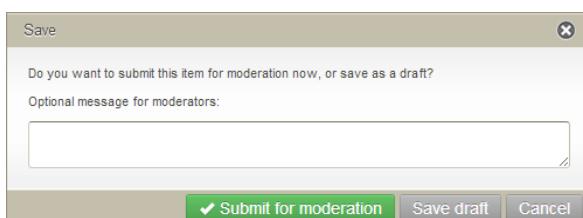
### To submit the resource to the repository

1. Click Save to display a dialog. An example is shown in Figure 39.



**Figure 39 Save dialog**

2. If the resource is not ready to be submitted, either:
  - Click Save draft—the resource is saved as a draft and can be edited and submitted later, or
  - Click Cancel to close the dialog and return to the resource for further editing.
3. If the resource is ready to be submitted, click Publish. The resource is published to the repository and can be selected for addition to a course (see Figure 41). If the collection selected for contribution is associated with a Moderation Workflow, the dialog shown in Figure 40 displays.



**Figure 40 Submit for moderation dialog**

Select **Submit for moderation** to enter the resource into the moderation workflow. The **Summary** page displays with the Moodle panel. An example is shown in Figure 41.

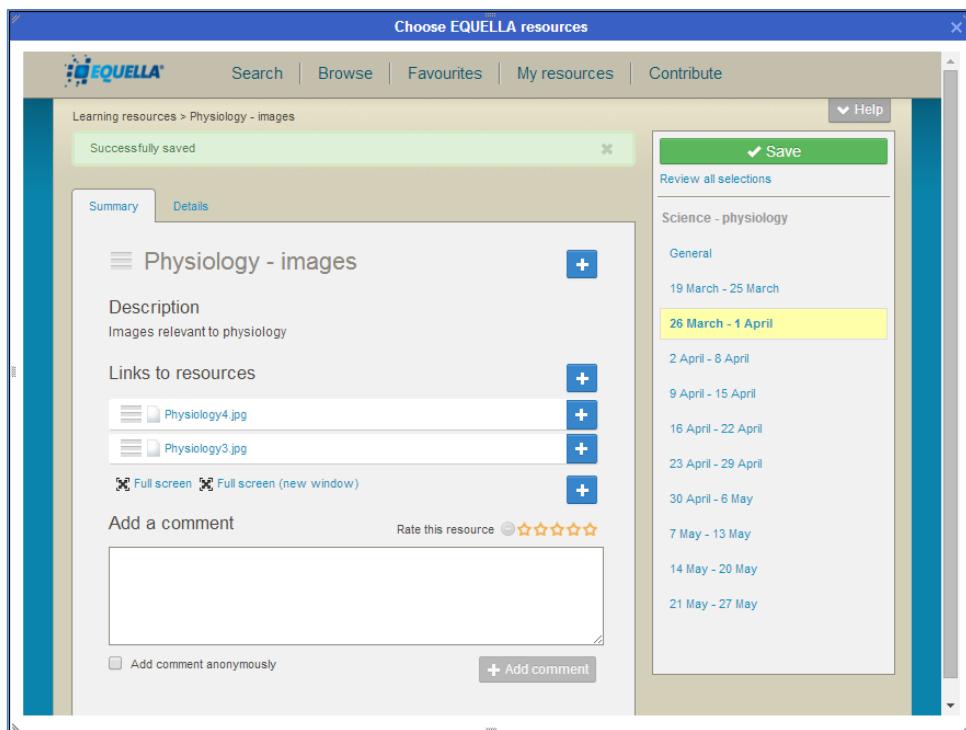


Figure 41 Integration screen - Summary page

## Search results – Standard view

An example of a Search results page is shown in Figure 42.

A screenshot of the EQUALLA search results page. The search bar at the top contains 'Enter search terms...'. Below it, a dropdown menu says 'Within all resources'. There are buttons for 'Standard', 'Images', and 'Videos', with 'Standard' being selected. The search results list several items: 'Physiology' (General physiology images), 'The fascinating origin of dogs' (Interesting articles, images and links covering the origin of dogs), 'A study of dogs' (A short document covering an overview of the history of dogs, and some links to interesting information), and 'Pavlov's Dog'. Each result has a status indicator (e.g., 'Live'), creation date, last update date, and a preview image. The right side of the screen shows the same scheduled tasks list as Figure 41.

Figure 42 Example Search results page

The Standard view is the default view for the results page. Also available is the Images view (see [Search results – Images view](#) on page 40 for further information) and Videos view (see [Search results – Videos view](#) on page 42).

Within the Standard view, results are 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:

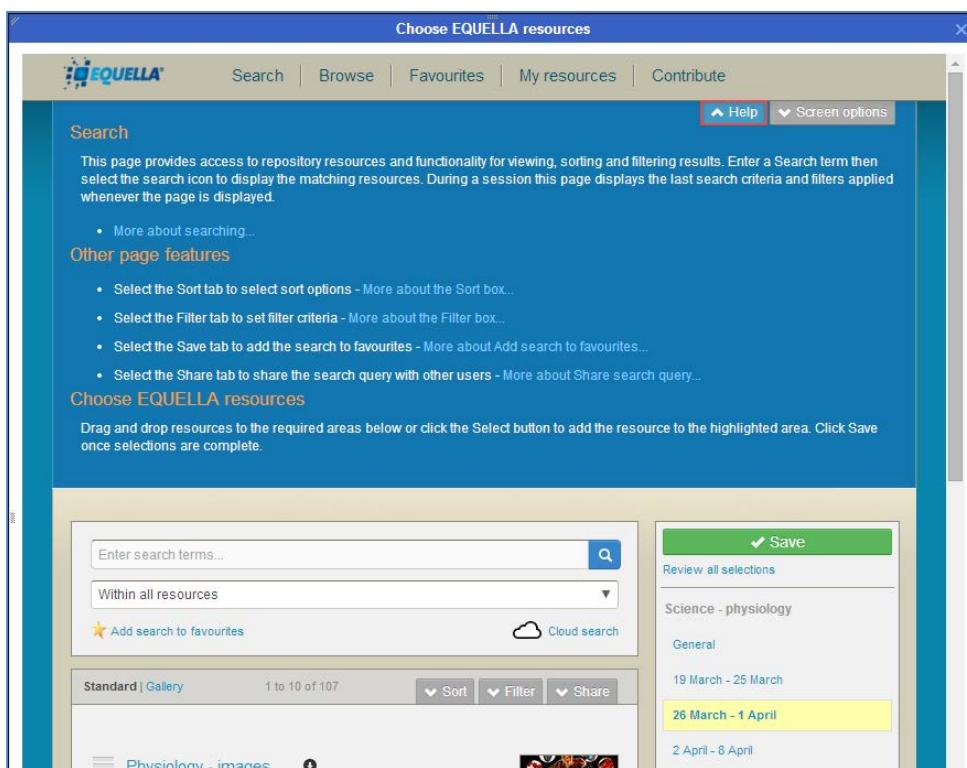
- **Title**—select this link to display the summary page. Further information is provided in the [Resource summary page](#) section on page 44.
-  - this drop-down icon displays next to the title when a resource has one or more attachments. Clicking the icon displays the attachments in either a structured or thumbnail grid format, depending on the collection's search results template configuration. (For further information, see the *EQUELLA 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 can be *live, archived, deleted, suspended, review, moderating, rejected* or *draft*.

*NOTE: Only resources with the status of Live can be added to course locations.*

- **Last updated**—the time period passed since the resource was last updated.
- **Star rating and <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 47.
- **Add to favourites/Remove from favourites**—select this link to add the resource to, or delete it from the resource favourites list (see [Adding or removing favourite resources](#) on page 22 for further information).
- **Add to hierarchy** – opens the **Modify key resource** page to add the resource to a hierarchy topic or sub-topic as a key resource. See [Modify key resource](#) on page 33 for further details.
- —click this button to select the resource summary page or attachment for addition to the currently selected Moodle location.

Other elements on the Search page include:

- —click the button to display context-sensitive help at the top of the page. An example is shown in Figure 43. Depending on the context, links to other help topics can also display. Click the button again to hide the help pane.



**Figure 43 Help page**

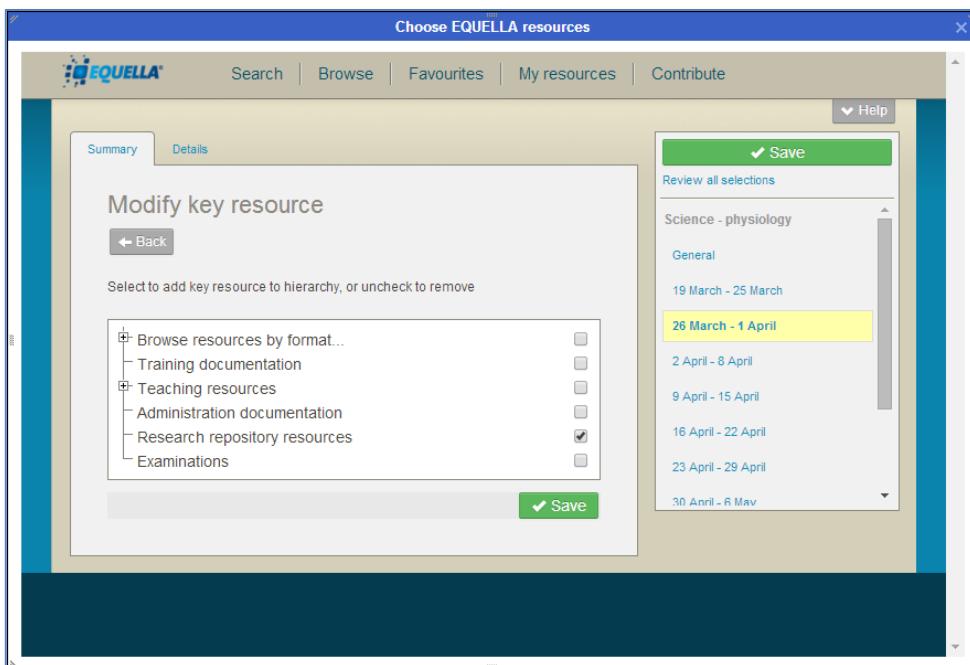
- **Screen options**—click the button to display the screen configuration options, which can include:
  - **Include results that are not live**—select the checkbox to display all results, regardless of their status. (*NOTE: This option will only display if set by your administrator. Additionally, only resources with a status of Live can be added to courses.*)
  - **Number of results per page**—select how many results (10, 50 or 100) are displayed per page from the drop-down list.
  - **Search attachments**—uncheck if it is not required to search in attachments for the search terms entered in the search box.

## Modify key resource

Resources can be added as key resources to one or more hierarchy topics from the results page.

### To add or remove a key resource to a hierarchy topic

1. Select the **Add to hierarchy** link from the results page to display the **Modify key resource page**. An example is shown in Figure 44.

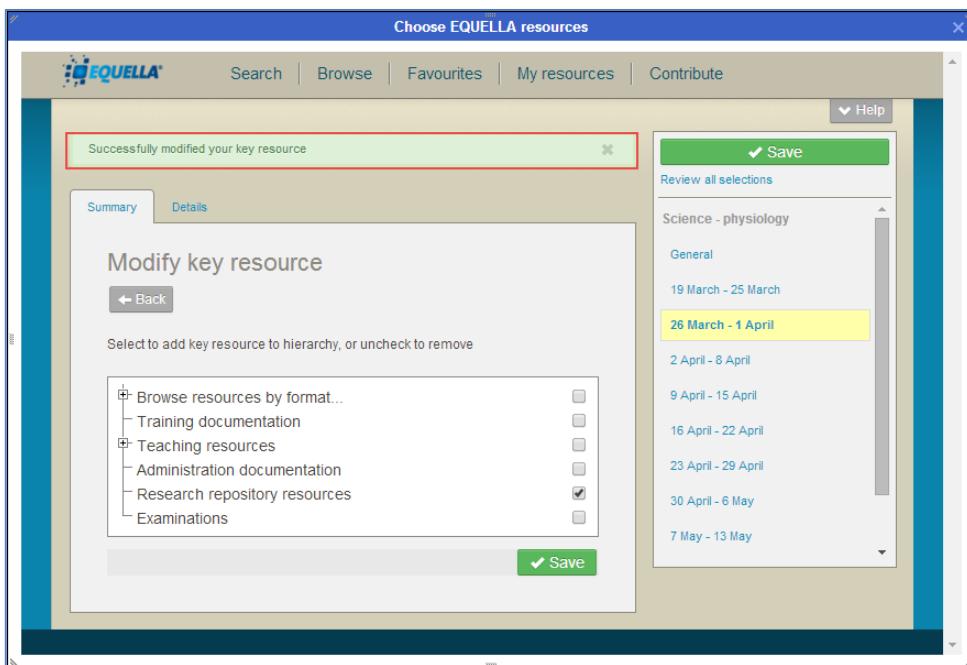


**Figure 44 Modify key resource page**

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 44.

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

4. Click . A confirmation screen displays, as shown in Figure 45.



**Figure 45 Confirmation of Key resource modification**

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

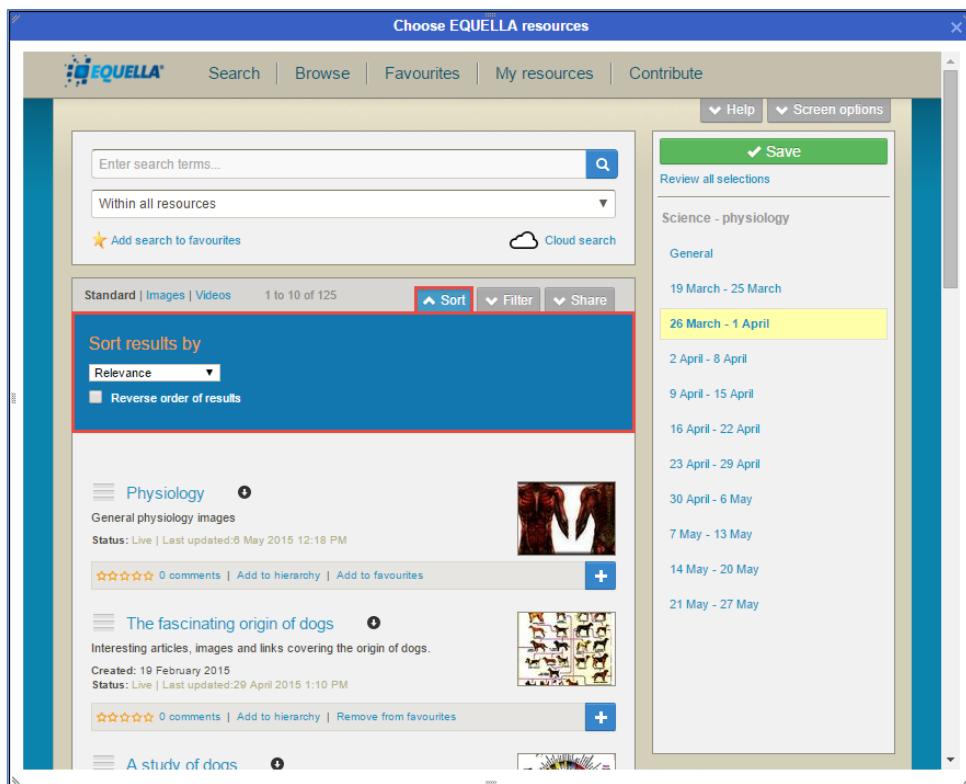
See the *EQUELLA Hierarchy Configuration Guide* for further information on hierarchies and key resources.

## *Sorting, filtering and sharing results*

Resources can be sorted and filtered using the Sort and Filter drop-downs.

### **Sort results**

Clicking the **Sort** drop-down opens the **Sort** pane, which provides options for sorting the results list. An example is shown in Figure 46.



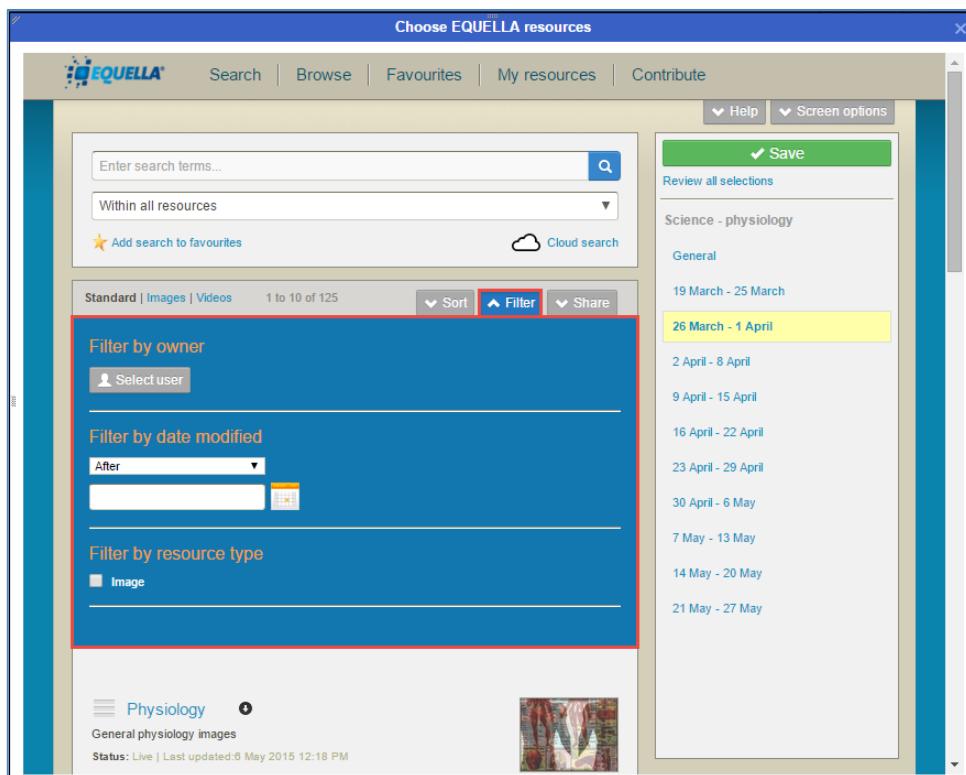
**Figure 46 Sort options**

The **Sort results by** drop-down list can include: **Relevance**, **Date last modified**, **Date created**, **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.

Click the **Sort** drop-down again to toggle the Sort pane display.

## Filter results

Clicking the **Filter** drop-down displays the **Filter** pane which provides options for reducing the number of displayed results by entering filter criteria. Clicking the **Filter** drop-down again closes the filter options display. An example is shown in Figure 47.

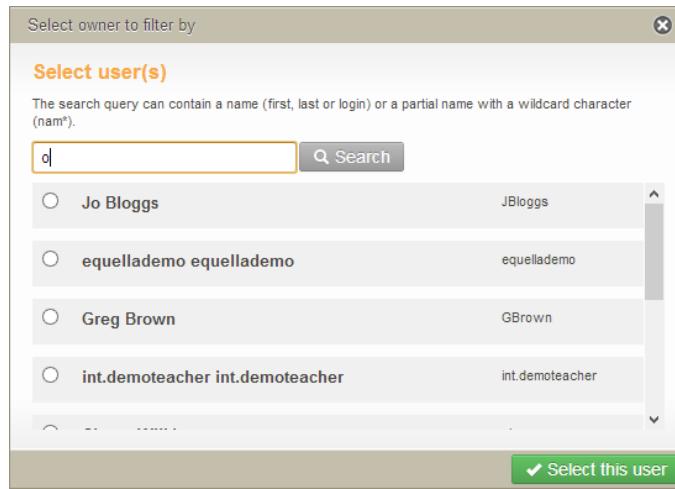


**Figure 47 Filter options**

The following filters are available:

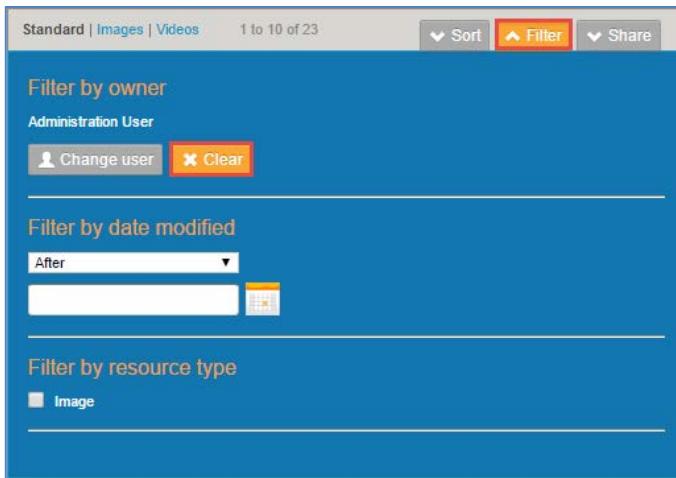
#### Filter by owner

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 48.



**Figure 48 Select owner to filter by dialog**

Select a user (e.g. *Administration User*) 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** section. An example is shown in Figure 49.

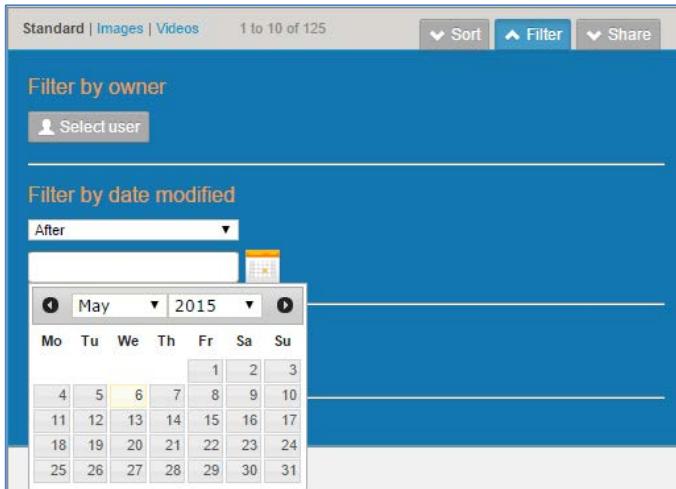


**Figure 49 Example with Owner filter set**

The owner selected can be changed by clicking **Change user**, or removed by clicking **Clear**. Note that the **Filter** tab label displays in orange once a filter is set.

### Filter by date modified

Select a qualifier from the drop-down list: **After**, **Before**, **Between** or **On**, then click the **calendar** field or  to display a calendar control. An example is shown in Figure 50.

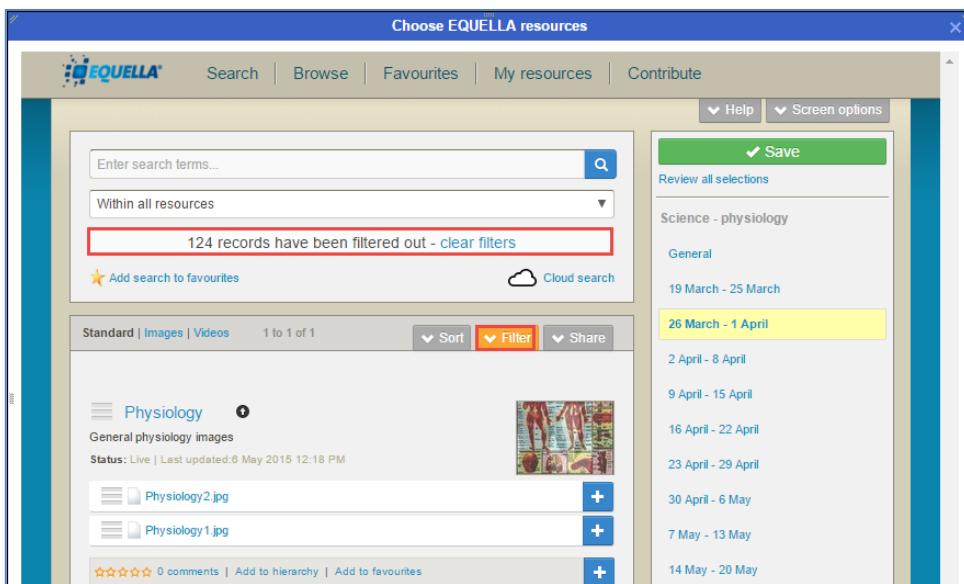


**Figure 50 Calendar control**

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

### Clear filters

An '*X records have been filtered out*' message is displayed when a filter has been applied to search results. Additionally, the **Filter** tab label is highlighted in orange. An example is shown in Figure 51.



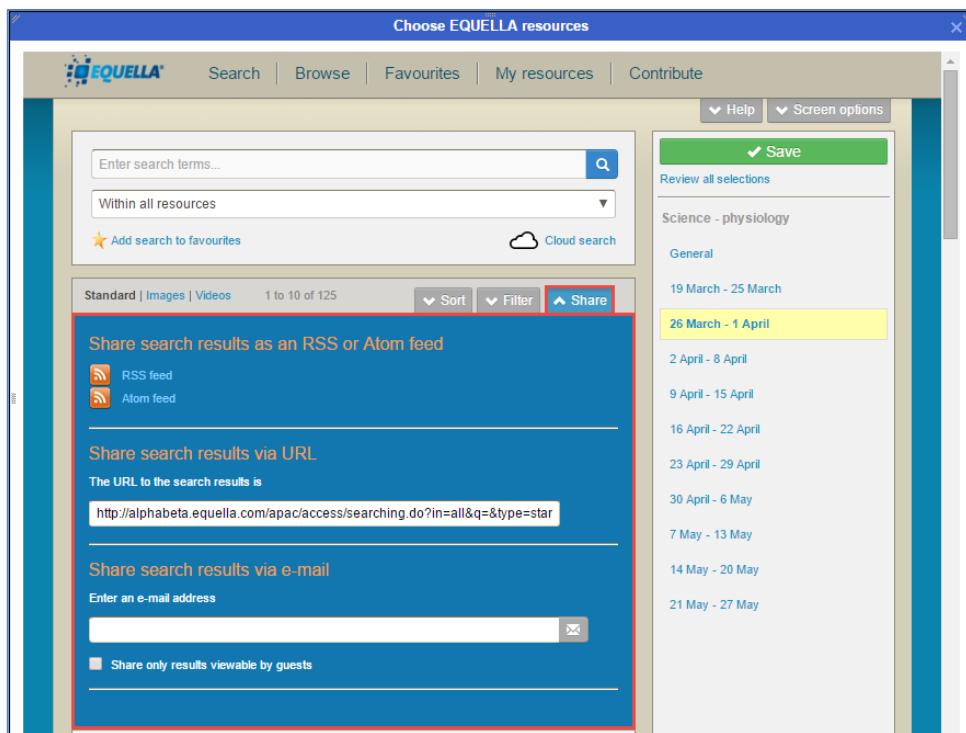
**Figure 51 Filtered results – message and tab highlight**

Select the **clear filters** link to remove the filter criteria and display all results.

## Share results

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

Clicking the **Share** tab at the top of the Results box displays the **Share search query** pane where results can be shared by: RSS or Atom feed, via URL and via e-mail. An example is shown in Figure 52.



**Figure 52 Share search results dialog**

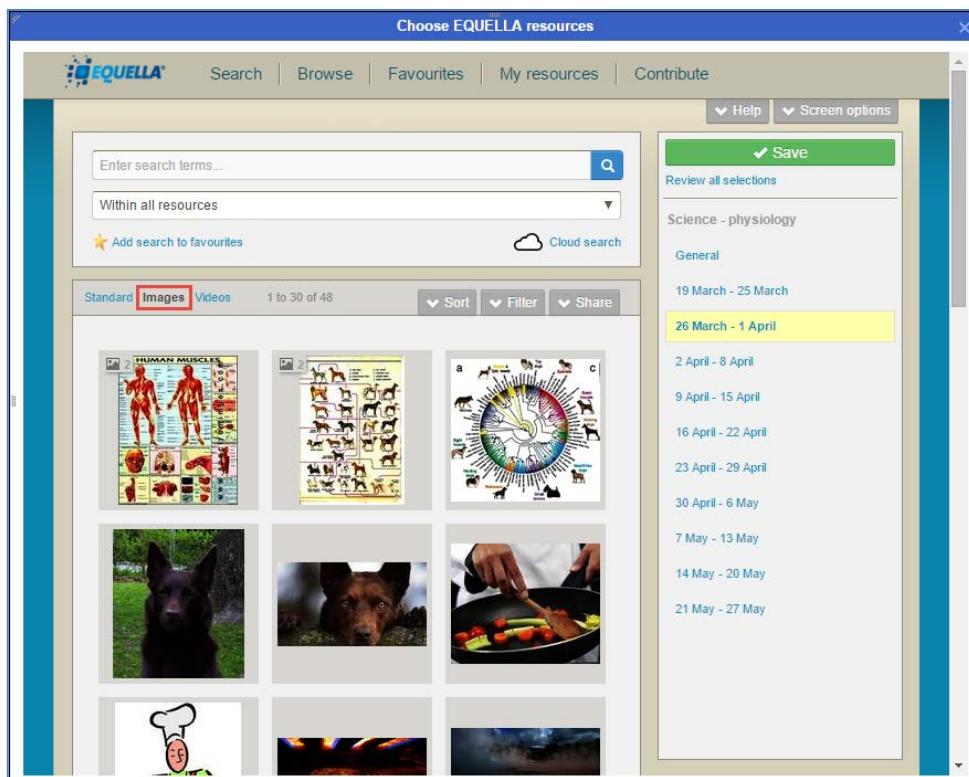
- **Share search results as an RSS or Atom feed**—selecting the **RSS feed** or **Atom feed** link will display a subscription page. Subscribed users are notified if resources are updated or added to the search results.
- **Share search results via URL**—users can send a link to the search results page 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. After logging 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 . Check the **Share only results viewable by guests** checkbox if sending to users outside your institution.

## Search results – Images view

Resource results can be viewed in an image grid format. Each resource can be allocated one image thumbnail to be used for the Images view from its image attachments. The images cannot be selected for course locations from the Images view, as the image thumbnail is representative of the whole resource, not just one attachment.

### To display results in the Images view

1. In the top-left of the Results box, click the **Images** link. The equivalent results in an image gallery format display. An example is shown in Figure 53.

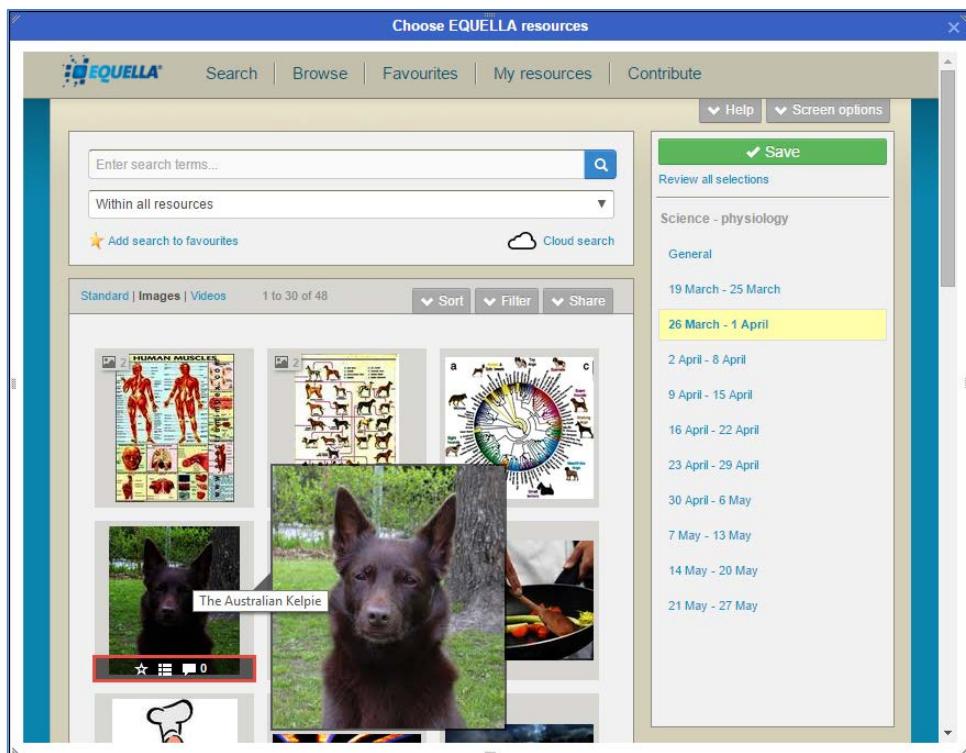


**Figure 53 Images view**

The Search box can still be used to enter search criteria or restrict searches to specific collections or advanced searches, but the results show in a thumbnail format. Click the **Standard** link to return to the standard view.

Up to 30 images are displayed per page, with links to other pages if relevant. Image aspect ratios are maintained in the thumbnail views, making it easy to determine if the image has a horizontal or vertical orientation.

Hover the mouse over a specific image to display a larger version (image will show as actual size to a maximum of 500 x 500 pixels). An example is shown in Figure 54.



**Figure 54 Images view - image enlarged with mouse hover**

While the mouse is hovering over a specific image, a menu displays at the bottom of the thumbnail, containing the following icons:

- ★ - Click to open the **Add to favourites** dialog and add the resource to your Favourites (see [Adding or removing favourite resources](#) on page 22 for further information).
- ☰ - Click to open the **Modify key resource** dialog to add or delete the resource as a key resource from a hierarchy (see [Modify key resource](#) on page 33 for further information).
- 💬 - Click to open the Resource summary page with a focus on the Comments section.

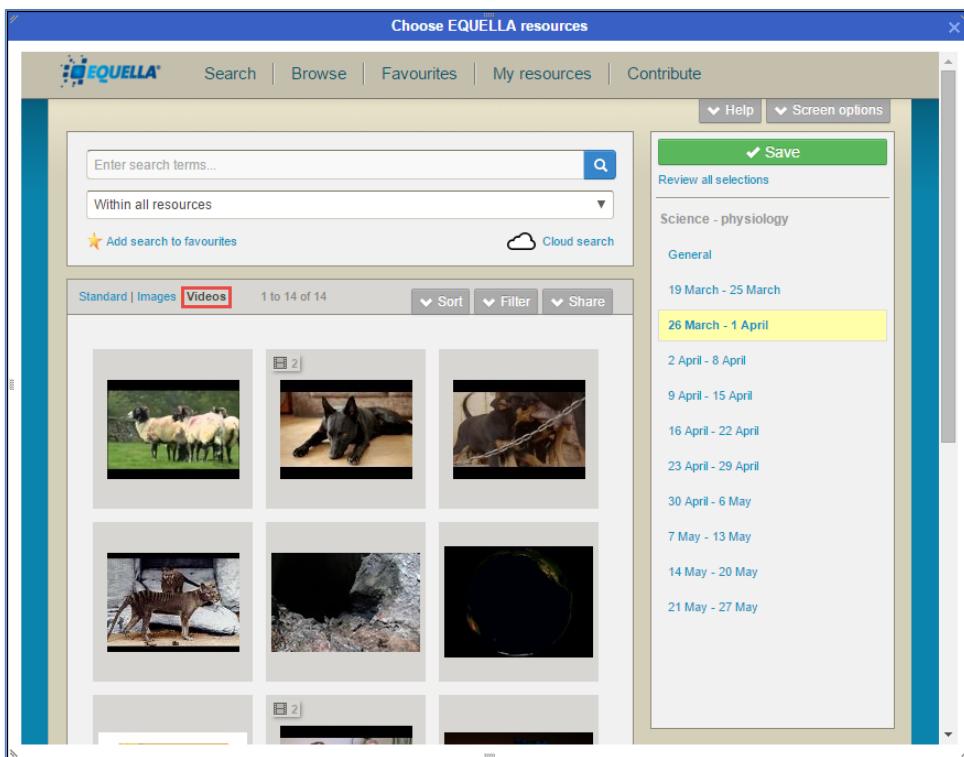
Click the thumbnail image to open the **Resource summary** page.

## Search results – Videos view

Resource results can be viewed in a video grid format. Resources with attached video files or linked streaming media can display one video thumbnail and preview to represent the resource on the Videos view page. The videos cannot be added to course locations from the Videos view, as the video thumbnail is representative of the whole resource, not just one attachment.

### To display results in the Videos view

1. In the top-left of the Results box, click the **Videos** link. The equivalent results in a video gallery format display. An example is shown in Figure 55.

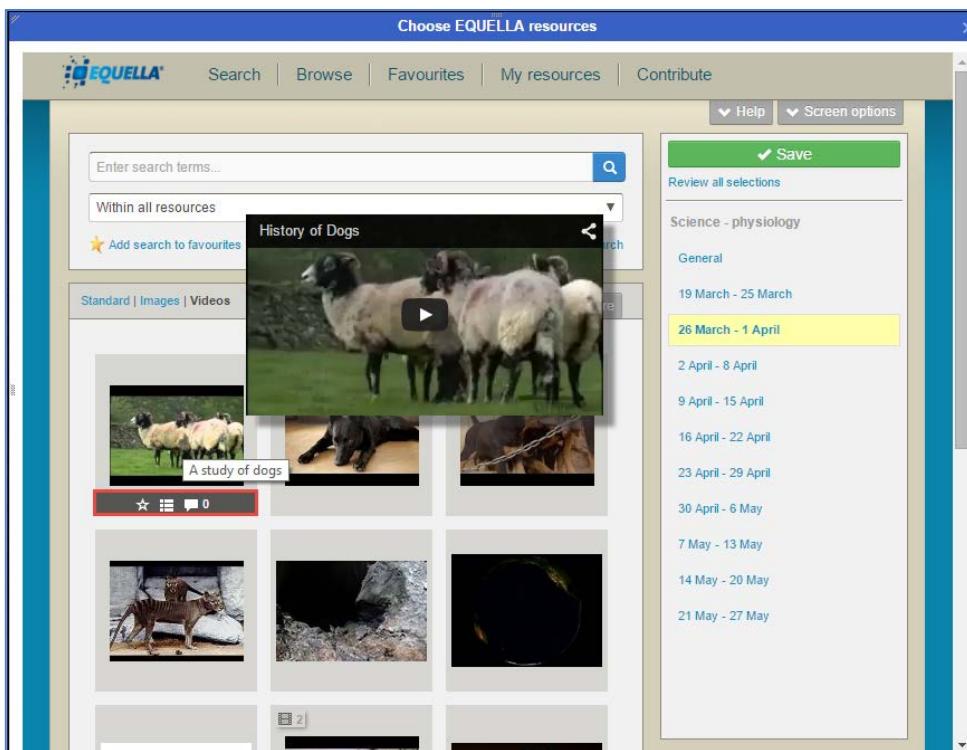


**Figure 55 Videos view**

The Search box can still be used to enter search criteria or restrict searches to specific collections or advanced searches, but the results show in a thumbnail format. Click the **Standard** link to return to the standard view.

Up to 30 videos are displayed per page, with links to other pages if relevant.

Hover the mouse over a specific video to display a larger version with a **Play** button to start playing a review. To stop playing the preview, point the mouse away from the preview box. An example is shown in Figure 56.



**Figure 56 Videos view - video enlarged with mouse hover**

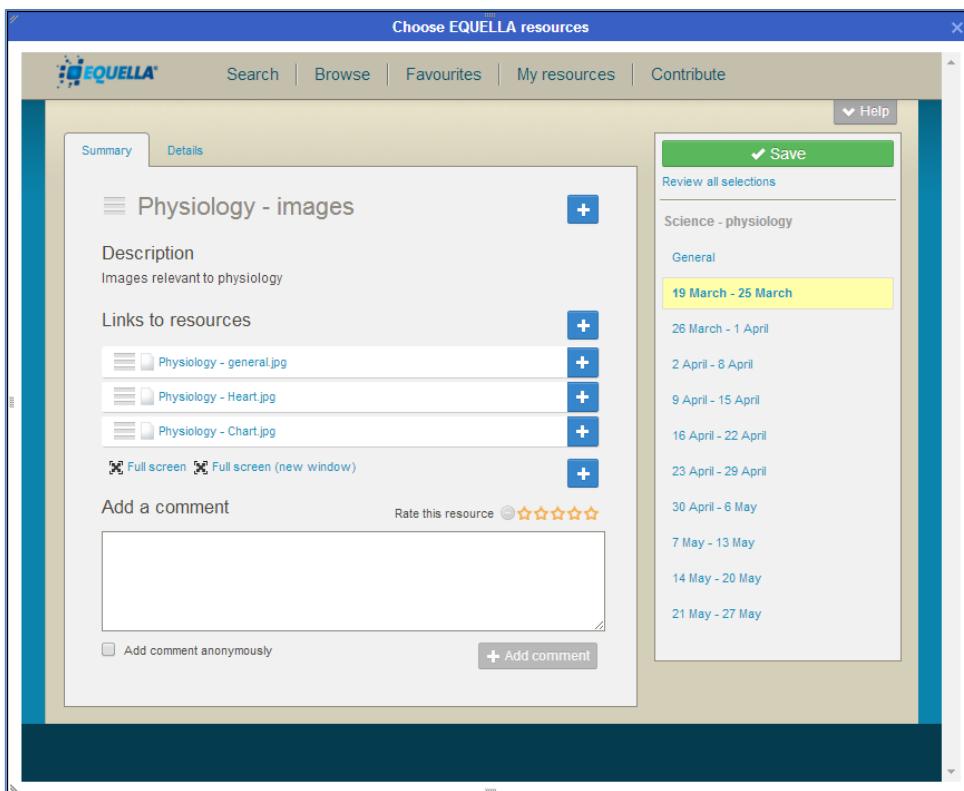
While the mouse is hovering over a specific video, a menu displays at the bottom of the thumbnail, containing the following icons:

- ★ - Click to open the **Add to favourites** dialog and add the resource to your Favourites (see [Adding or removing favourite resources](#) on page 22 for further information).
- ≡ - Click to open the **Modify key resource** dialog to add or delete the resource as a key resource from a hierarchy (see [Modify key resource](#) on page 33 for further information).
- 💬 - Click to open the Resource summary page with a focus on the Comments section.

Click the thumbnail image to open the **Resource summary** page.

## Resource summary page

The Resource summary page is used to view, edit, comment and rate resources. An example is shown in Figure 57.



**Figure 57 Integration screen Resource summary page - Summary tab (default)**

The summary page displays two tabs:

**Summary** – is the default display and shows the resource name, description, attachment list and viewing options, and ratings and comments (see [Summary tab](#) on page 45 for further details).

**Details** – displays details about the resource, including *Owner*, *Collection*, *Status* and *Version*. Additionally, actions that can be performed on the resource can be accessed from the **Actions** list (see [Details tab](#) on page 48 for further details).

## Summary tab

The **Summary** tab displays the following information:

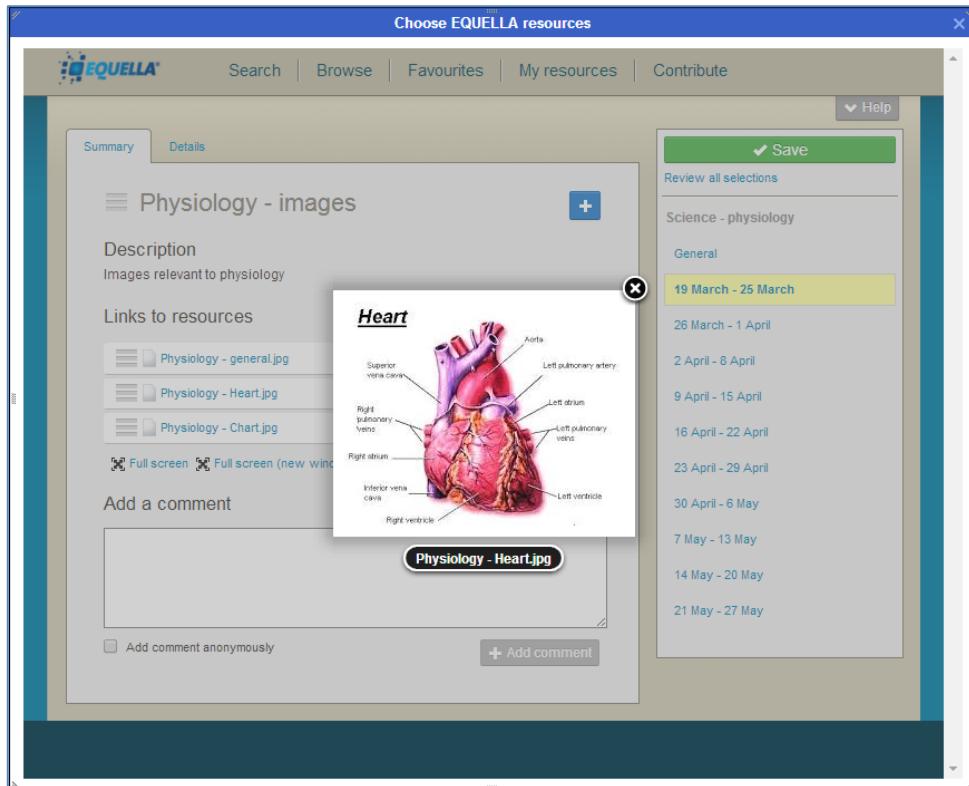
- **Title**
- **Description**
- **Links to resources section** – lists the resource attachments. See [View attachments](#) on page 45 for further information.
- **Full screen/Full screen (new window) links** – opens all of the attachments in a full screen mode.
- **Comments and ratings section** – see [Comments](#) on page 47.

## View attachments

The **Links to resources** section displays links to attachments, thumbnail images and viewers configured to view the resources.

## To display an attachment

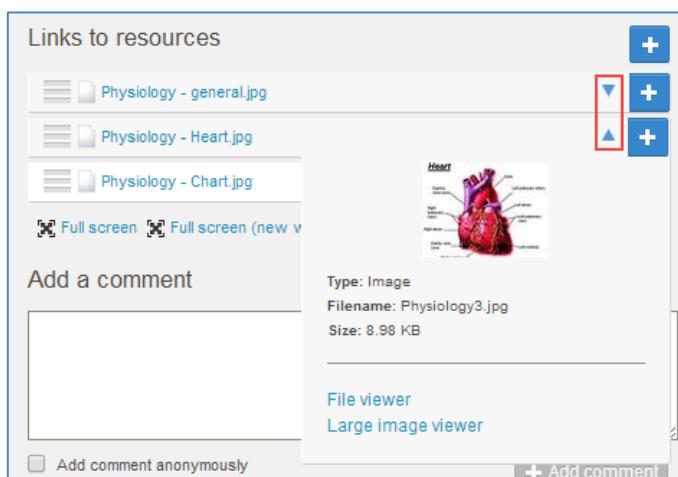
1. Select an attachment link to display the attachment in the default viewer. An example is shown in Figure 58.



**Figure 58 Attachment displayed in default viewer**

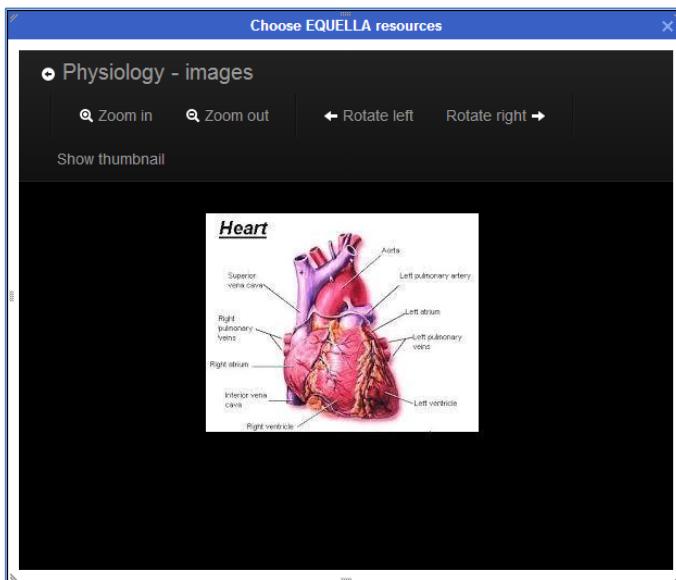
## To display attachment details and viewer options

1. Select the down arrow to the right of the attachment, or click in the space between, to display an expandable pane. This pane contains an image preview, name, type and size of attachment, and viewer options. An example is shown in Figure 59.



**Figure 59 Viewer options**

2. Select a configured viewer (e.g. **Large image viewer**) to display the attachment. An example is shown in Figure 60.



**Figure 60 Attachment displayed in large image viewer**

Further information is provided in the [Large image viewer](#) section on page 52.

### To display all attachments

1. Select the **Full screen** link at the bottom of the attachments list to display all attachments in the default viewer. An example is shown in Figure 61.



**Figure 61 File viewer with packaged content**

Use the browser **Back** button to return to the Resource summary page.

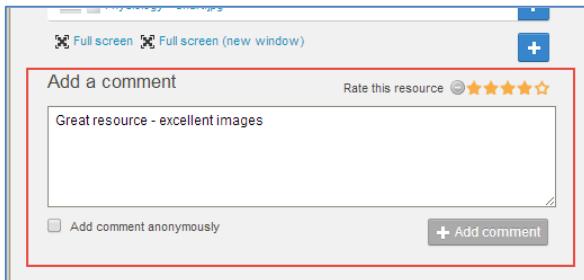
### Comments

The **<x> comments** section on the resource summary page displays previously added comments and ratings.

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

### To add a comment

1. Enter text in the **Add a comment** text box.
2. Select an optional star rating (1-5). An example is shown in Figure 62.

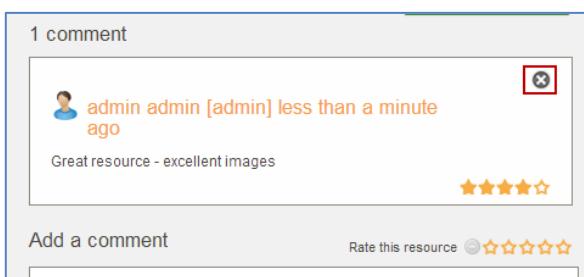


**Figure 62 Add a comment section**

3. Click **+ Add comment**.

### To delete a comment

1. Select the **X** icon that appears in the comment box alongside the comment, as shown in Figure 63.



**Figure 63 Delete comment**

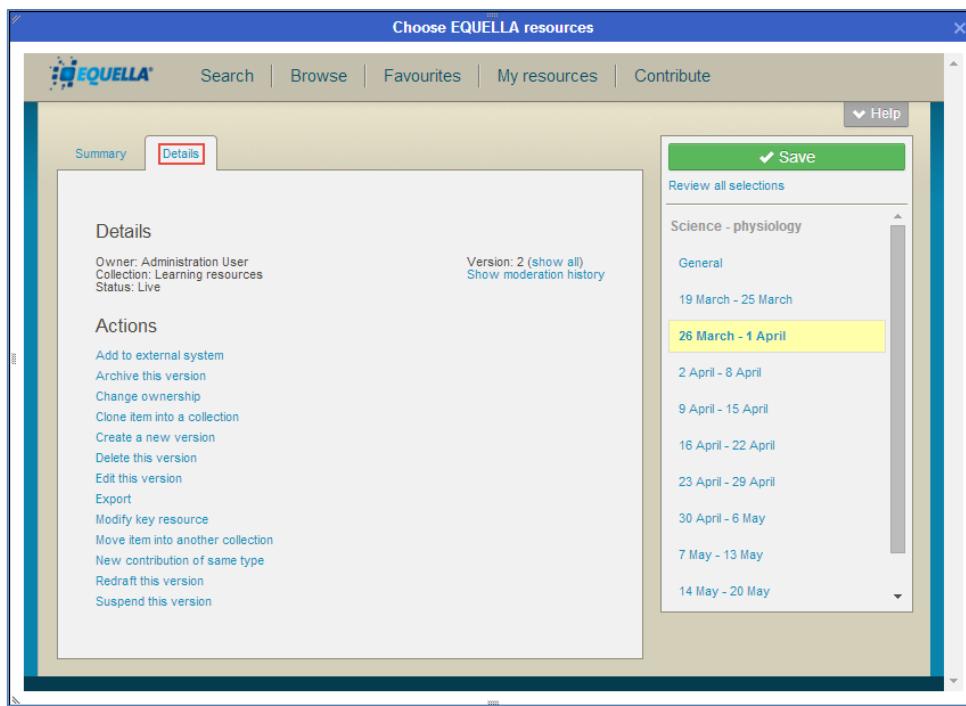
2. Click **OK** in the confirmation dialog.

### Details tab

The **Details** tab has two sections:

- **Details** - displays information about the resource
- **Actions** - enables access to the actions menu.

An example is shown in Figure 64.



**Figure 64 Integration Resource summary page - Details tab**

The **Details** section can include:

- **Owner**—the user that created the resource.
- **Collaborators**—any users who have been added as collaborators for this resource. See [Change ownership](#) on page 54 for further information.
- **Collection**—the collection to which the resource belongs. Selecting the collection link displays a search result list for that collection.
- **Status**—resource statuses can be Live, Archived, Deleted, Suspended, Review, Moderating, Rejected or Draft.

*NOTE: Only Live resources can be added to Moodle courses.*

- **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 [To view all versions of a resource](#) on page 49.
- **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 [Terms of use page](#) section on page 50.
- **Show moderation history**— select this link to display the **Moderation history** page. Refer to the [Moderation history page](#) section on page 51 for more information.

## Show all versions

If there are multiple versions of a resource, a list of the versions can be viewed.

### To view all versions of a resource

1. Select the [\(show all\)](#) link beside the current **Version** details. An example is shown in Figure 65.

The screenshot shows a 'Details' page for a resource. At the top, there are 'Summary' and 'Details' tabs. Below the tabs, the word 'Details' is repeated. Underneath, it says 'Owner: Administration User', 'Collection: Learning resources', and 'Status: Live'. To the right, it shows 'Version: 2 (show all)' and a link 'Show moderation history'. On the far right, there is a vertical sidebar with icons for 'Review', 'Science', 'General', '19', '26', and '24'.

**Figure 65 Version (show all) link**

The **Versions of this item** page displays, listing all resource versions and their statuses. An example is shown in Figure 66.

The screenshot shows the 'Versions of this item' page. It has a 'Back' button and a table with three columns: 'Version', 'Title', and 'Status'. The table contains two rows: one for version 2 titled 'Physiology - images' with status 'live', and one for version 1 titled 'Physiology - images' with status 'archived'. On the right, there is a vertical sidebar with icons for 'Review', 'Science', 'General', '19', '26', and '24'.

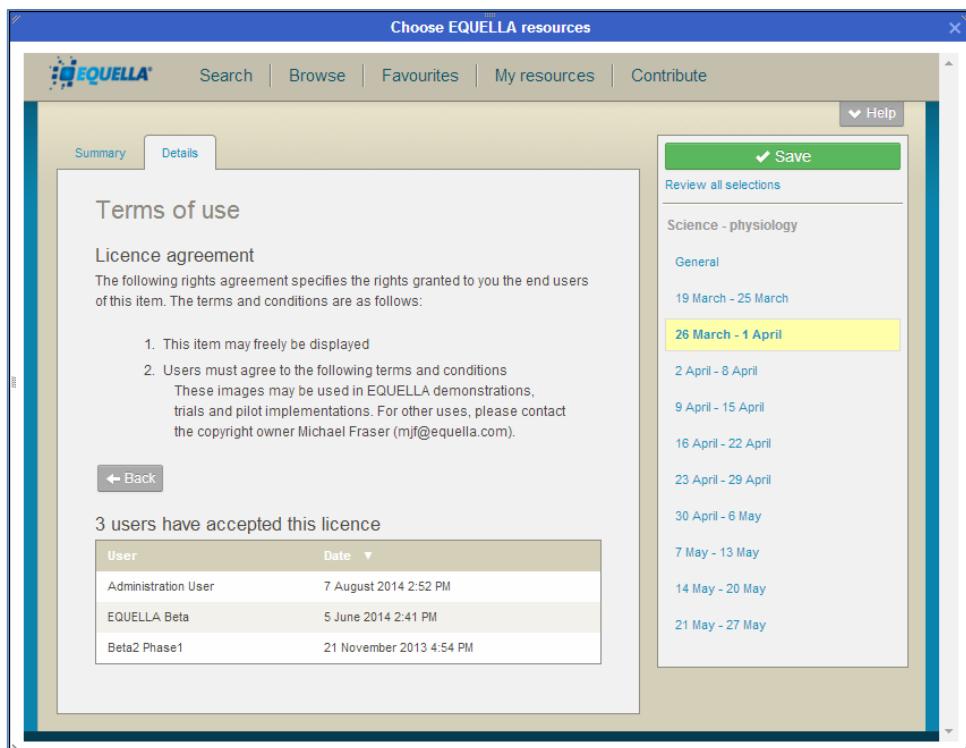
**Figure 66 Versions of this item page**

When a new resource has been created using the **Create a new version** action, the previous version is archived. The example in Figure 66 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 link of the version to display the resource summary page of the selected version.

## Terms of use page

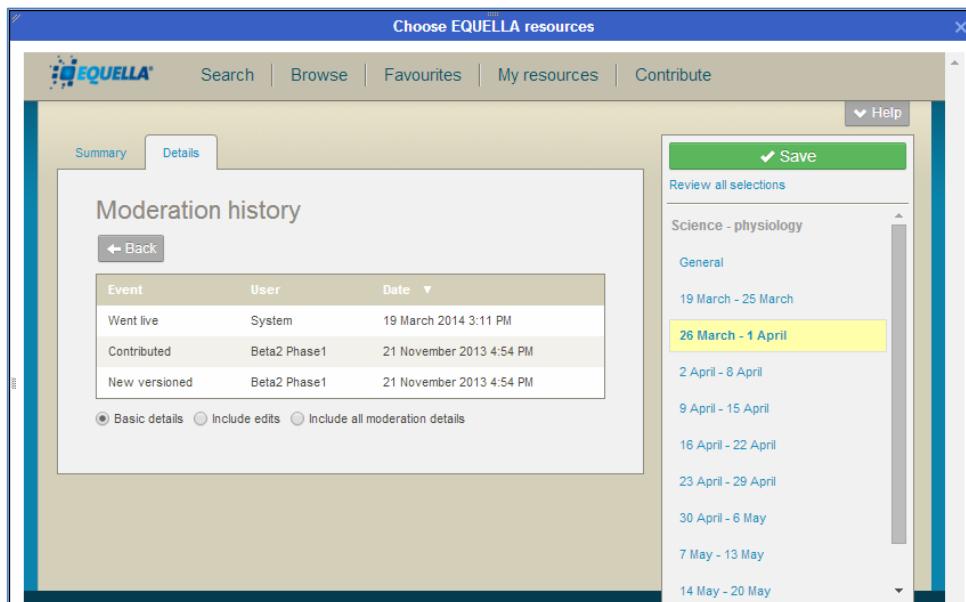
Selecting the **Terms of use** link displays the **Terms of use** page which lists the terms of use that users must accept before they can view the resource. Additionally, a list of users that have accepted those terms of use is displayed. An example is shown in Figure 67.



**Figure 67 Terms of use 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 68.



**Figure 68 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.
- **Basic details** – displays only basic moderation details.
- **Include edits**—displays all Edit events in the history.
- **Include all moderation details**—displays all events in the history, including Edit and Workflow reset events.

## Actions

The **Actions** area can display the following operations, depending on user permissions:

### Add to external system

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

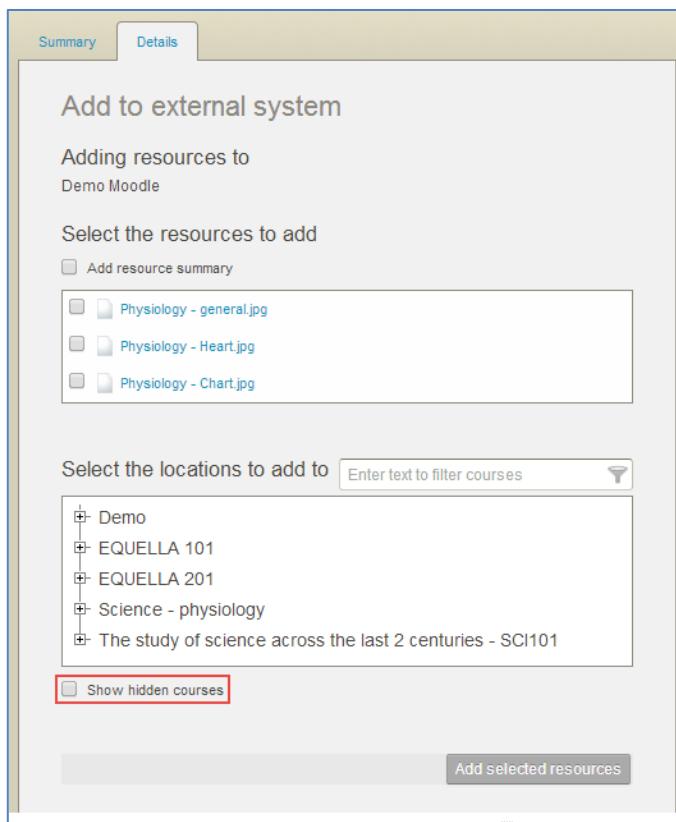
Selecting this action allows the user to add all or parts of the resource to external connectors that have been configured in the system. (*Note: The **Add to external system** link only displays if at least one external connector has been configured in the EQUELLA system.*) See the *EQUELLA Push to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

EQUELLA supports Moodle and Blackboard connectors, 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.

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

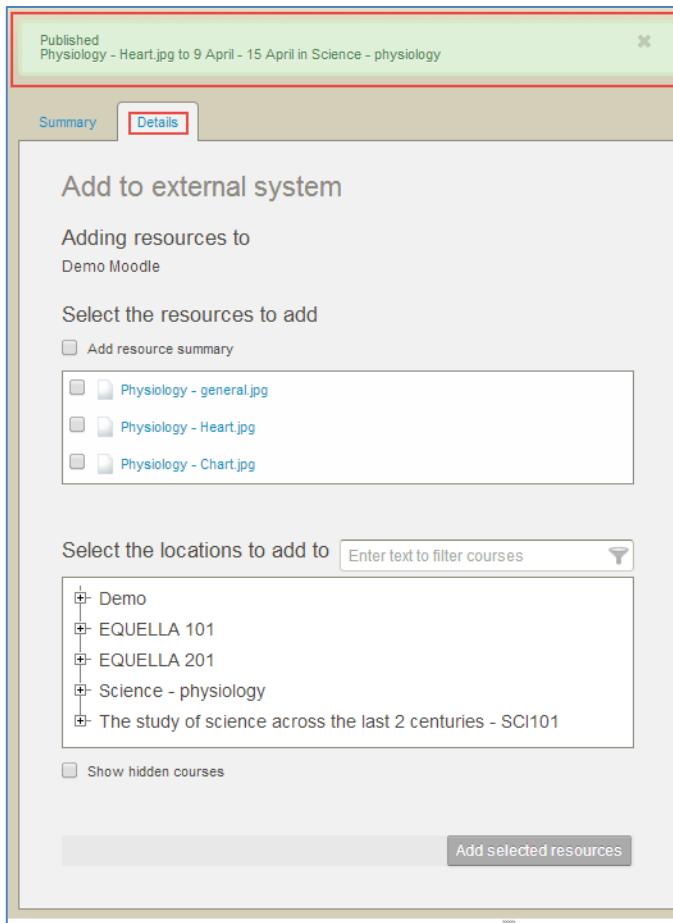
#### To add a resource to an external system

1. Select the **Add to external system** link from the **Actions** menu.
2. Select the external 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 is shown in Figure 69.



**Figure 69 Add to external system**

3. Select the required resources from the **Select the resources to add** section.
4. Click the **Show unavailable courses** checkbox to display any courses set as 'unavailable' in Blackboard, the **Show hidden courses** to display any courses set as 'hidden' in Moodle, use to expand courses to show their locations and/or enter text in the filter text box to show only matching courses, if required. (This filter box only displays if there are more than 10 results in the *Select the locations to add to* pane.)
5. Select the location/s to which the resource should be added, then click .
6. An action receipt confirming the successful addition of the resource is displayed at the top of the page. An example is shown in Figure 70.



**Figure 70 Successful addition of resource to Moodle location**

7. Click the **Details** tab link to return to the Details page.

## Archive this version

Displays for resources with a status of 'Live'. Archiving hides the resource from searches, 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 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 71.

The screenshot shows a web interface for managing ownership and collaboration. At the top, there are 'Summary' and 'Details' tabs, with 'Details' selected. Below this, the section 'Owner and collaborators' is displayed. Under 'Owner', it shows 'Administration User' with a 'Change' link. Under 'Collaborators', it says 'There are currently no collaborators' and has a '+ Add collaborators' link. A 'Back' button is also present.

**Figure 71 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. Click the **Add collaborators** link to display the **Select collaborators** dialog. Collaborators are listed with a **Remove** link alongside.
4. Click **← Back** to return to the Details page.

## 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 **Create a 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 72.

The screenshot shows the 'Clone this item' page. It has three main sections: 'Select an operation' (radio buttons for 'Clone' and 'Clone without attachments', with 'Clone' selected), 'Select a collection' (a dropdown menu set to 'Teaching resources'), and 'Select a schema transform (optional)' (a dropdown menu set to '(None selected)'). At the bottom right is a large green 'Clone' button with a checkmark icon.

**Figure 72 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; or

- **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

3. Select the **Select a collection** drop-down to display the list of available collections.
4. Select a collection.

#### To apply an optional schema transform to the cloned resource

5. Select the **Select a schema transform (optional)** drop-down to display the options.
6. Select an option, or leave at the default (**None selected**).
7. Click  **Clone**. The contribution wizard for the resource is displayed.
8. Modify the item metadata or attachments, if required.
9. 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 purge scheduled task.

### Edit this version

Selecting this action displays the contribution wizard for the resource, allowing the user to modify metadata or files. 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, a SCORM package or a METS record with or without attachments.

### Mark this for review

Selecting this link (which only shows for resources with a status of '*live*' that are in a collection with an associated workflow) changes the status of the resource to '*review*' and places it at the beginning of the associated workflow.

### Modify key resource

Resources can be added or deleted as key resources to one or more hierarchy topics. See [Modify key resource](#) on page 33 for further details.

## 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 73.

The screenshot shows a 'Move this item' interface. At the top, it says 'Move this item'. Below that is a section labeled 'Select a collection' with a dropdown menu showing 'Learning resources'. Another section below it is 'Select a schema transform (optional)' with a dropdown menu showing 'OAI\_DC'. At the bottom right of the form is a green button labeled 'Move' with a checkmark icon.

**Figure 73** Move this item page

2. Click 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

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

## New contribution of same type

Selecting this action displays the original 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

Displays for resources of all statuses. This action hides the resource from searches 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.

## Large image viewer

An example of the large image viewer is shown in Figure 74.

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 item name is a clickable link to return the user to the resource summary page.

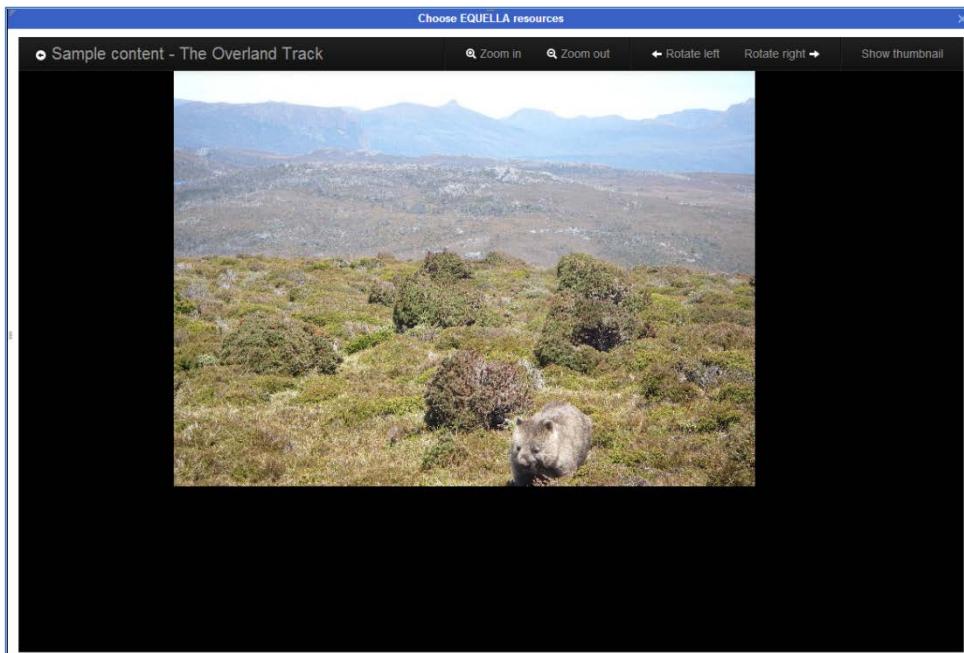


Figure 74 Large image viewer

## LMS panel

The LMS panel displays the details of the integrated LMS course (in this case, Moodle) and course locations. An example is shown in Figure 75.



**Figure 75 LMS (Moodle) panel**

The top section of the LMS panel contains the following elements:

- **✓ Save** - select this button to save selections made in a session to the Moodle course locations.
- Review all selections link – see [To view and edit all selections in a selection session](#) on page 67.

The bottom section displays the Moodle Course title and the course locations.

*NOTE: The course location where the **Add an activity or resource** link was selected is highlighted and bolded in the LMS panel.*

Resources can be selected and added to any course location. See [Select and add resources to a course](#) on page 59.

## Select and add resources to a course

From the search results page or the summary page, attachments and/or summary pages can be selected for addition to a course location.

Clicking the select button will add the selected attachment or summary page to the currently highlighted course location. There are a number of ways to make selections for course locations, including dragging and dropping and using the Select buttons.

### Select buttons

All the Select buttons on the results and summary pages initially look the same (+), but there are differences between the functions of some of them. Hovering the mouse over the buttons expand their labels. The exceptions are the Select buttons beside each attachment, which always show as +

To view the Select button labels, hover over a button to view the button label. Buttons that have labels are:

## Select summary page

The **Select summary page** button can display on the results and summary pages, depending on institution configuration. An example on the results page is shown in Figure 76.

The screenshot shows the 'Choose EQUELLA resources' interface. At the top, there's a search bar and navigation links for 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'. Below the search bar, there's a 'Help' dropdown and a 'Screen options' dropdown. A sidebar on the right contains a green 'Save' button with a checkmark, a 'Review all selections' link, and a list of resource categories and dates. The main content area displays search results for 'Within all resources'. One result is 'Physiology - images', which includes a thumbnail, a description ('Images relevant to physiology'), creation date ('Created: 7 August 2014'), status ('Status: Live | Last updated: 6 May 2015 3:14 PM'), and a 'Select summary page' button. Other results include 'Physiology' and 'The fascinating origin of dogs'. The 'Select summary page' button is highlighted with a red box.

**Figure 76 Select summary page button on result page**

An example on the Resource summary page is shown in Figure 77.

The screenshot shows the 'Choose EQUELLA resources' interface. At the top, there's a search bar and navigation links for 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'. Below the search bar, there's a 'Help' dropdown. The main content area shows a 'Summary' tab selected for a resource titled 'Physiology - images'. This tab displays a description ('Images relevant to physiology'), a 'Links to resources' section with several items (each with a '+' button), and a 'Add a comment' section. A 'Select summary page' button is located in the top right of the summary tab. To the right, there's a sidebar with a green 'Save' button, a 'Review all selections' link, and a list of resource categories and dates. The 'Select summary page' button is highlighted with a red box.

**Figure 77 Select summary page button on Resource summary page**

When this button is selected, a link to the **Resource summary page** for this resource is added to the highlighted Moodle course location.

## Select all attachments

The **Select all attachments** button displays on the summary page. An example is shown in Figure 78.

The screenshot shows the 'Choose EQUELLA resources' interface. On the left, there's a summary card for 'Physiology - images'. It includes a 'Description' section with 'Images relevant to physiology', a 'Links to resources' section with three attachments: 'Physiology - general.jpg', 'Physiology - Heart.jpg', and 'Physiology - Chart.jpg', and a 'Select all attachments' button. On the right, there's a sidebar with a green 'Save' button and a 'Review all selections' section. This section lists several time periods: 'Science - physiology', 'General', '19 March - 25 March', '26 March - 1 April' (which is highlighted in yellow), '2 April - 8 April', '9 April - 15 April', '16 April - 22 April', '23 April - 29 April', and '30 April - 6 May'.

**Figure 78 Resource summary page - Select all attachments button**

When this button is selected, a single link for each attachment is added to the highlighted Moodle course location. An example is shown in Figure 79.

The screenshot shows a Moodle course location for the period '26 March - 1 April'. Inside this period, there are three attachments: 'Physiology - Heart.jpg', 'Physiology - general.jpg', and 'Physiology - Chart.jpg'. These attachments are enclosed in a red box. To the left of the attachments, there's a vertical navigation bar with dates from '5 March' to 'May'. On the right, there's a sidebar with various Moodle links like 'EQUELLA', 'Contributions', 'All Tasks', 'Tasks assigned to me', 'Unassigned tasks', and 'All notifications'.

**Figure 79 Moodle course location with single links for each attachment**

Clicking on a link opens the single attachment in its default viewer.

## Select package

The **Select package** button displays on the summary page. An example is shown in Figure 80.

The screenshot shows the EQUELLA interface with a blue header bar. Below it, a navigation bar includes 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'. A 'Help' button is in the top right. The main area has tabs 'Summary' and 'Details', with 'Details' selected. It displays a resource titled 'Physiology - images' with a description: 'Images relevant to physiology'. Below this is a 'Links to resources' section containing three attachments: 'Physiology - general.jpg', 'Physiology - Heart.jpg', and 'Physiology - Chart.jpg'. Each attachment has a blue '+' button next to it. At the bottom left is a 'Select package' button. On the right, there's a sidebar with a green 'Save' button and a list of dates: '19 March - 25 March' (highlighted in yellow), '26 March - 1 April', '2 April - 8 April', '9 April - 15 April', '16 April - 22 April', '23 April - 29 April', '30 April - 6 May', and '7 May - 13 May'. Below the sidebar is a rating section with five stars.

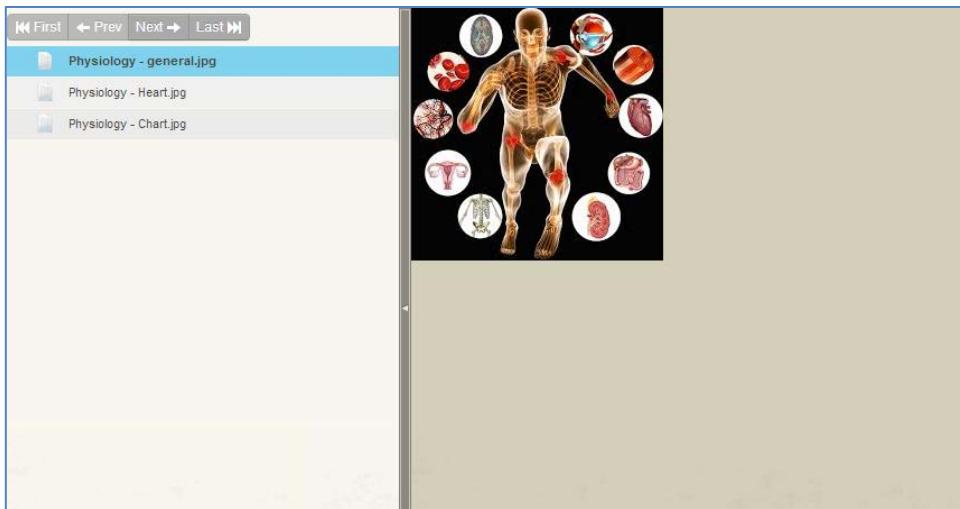
**Figure 80 Resource summary page - Select package button**

When this button is selected, a single link for all the attachments is added to the highlighted Moodle course location. An example is shown in Figure 81.

The screenshot shows a Moodle course location for the period '26 March - 1 April'. A red box highlights a link labeled 'Physiology - images' which is part of a package. The package also includes a file icon and a pencil icon. To the right of the link are edit and user icons. The left sidebar shows a calendar for March and April, and the right sidebar shows 'Contributed by' and 'All Tasks' sections.

**Figure 81 Moodle course location with single link for all attachments**

Clicking on the link opens the attachments in the package viewer. An example is shown in Figure 82.



**Figure 82 Package link - opens the package viewer where all attachments can be viewed**

## Selecting items

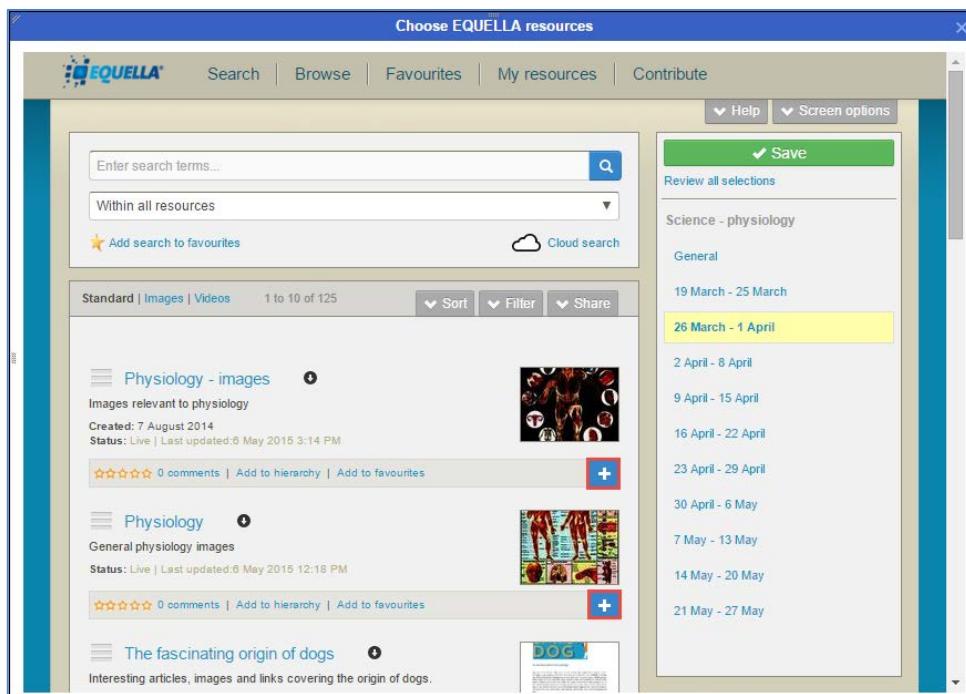
### Selection using buttons

To select attachments, summary pages and packages using the Select buttons

1. Check that the required course location is currently highlighted. To highlight an alternative location, click beside the location name.

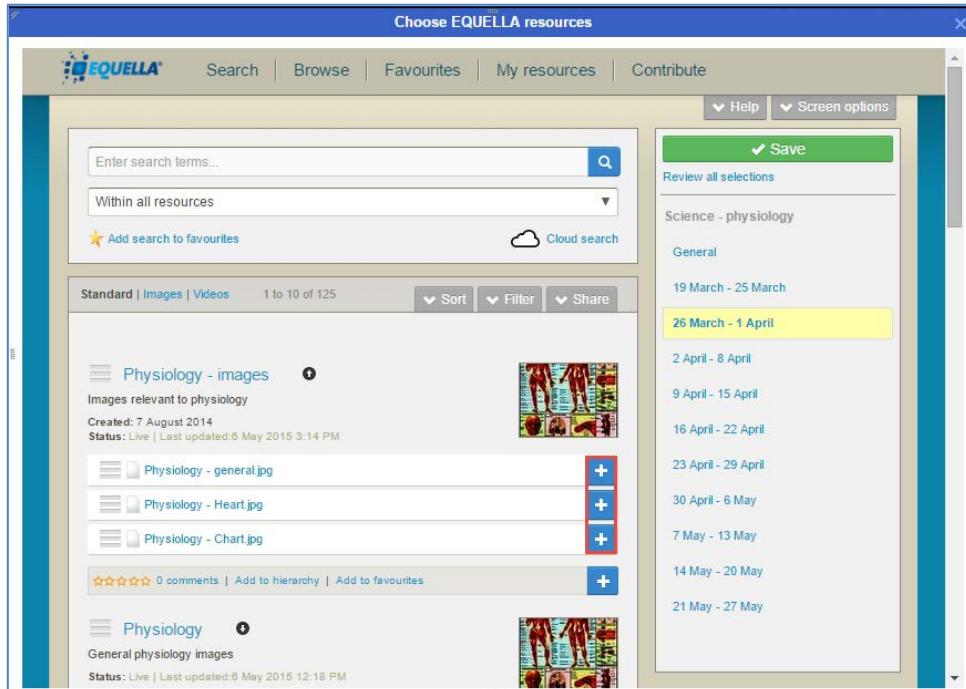
*NOTE: The course location where the **Add an activity or resource** link was selected is highlighted and bolded in the LMS panel. If an alternative location is manually highlighted, the original remains bolded. Items are only added to the highlighted course location.*

2. Click **+** beside the required attachment/s, summary pages or packages to add them to the highlighted course location.
  - Resource summary pages can be selected from the results page by clicking the **+** button in the footer of each result or by opening the Resource summary page and clicking the **+** button beside the title (see [Select summary page](#) on page 60 for further information). An example from the results page is shown in Figure 83.



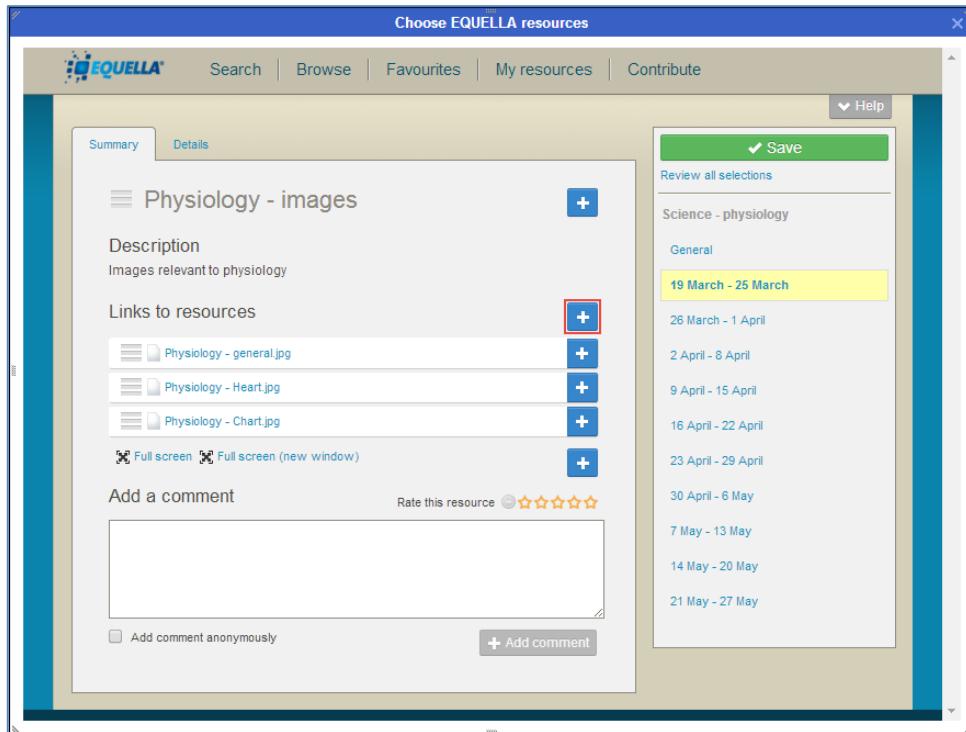
**Figure 83 Selecting summary page from search results page**

- Single attachments can be selected from the results page by clicking the icon to open the attachment display or by opening the summary page, then clicking the button/s beside the relevant attachments. An example from the results page is shown in Figure 84.



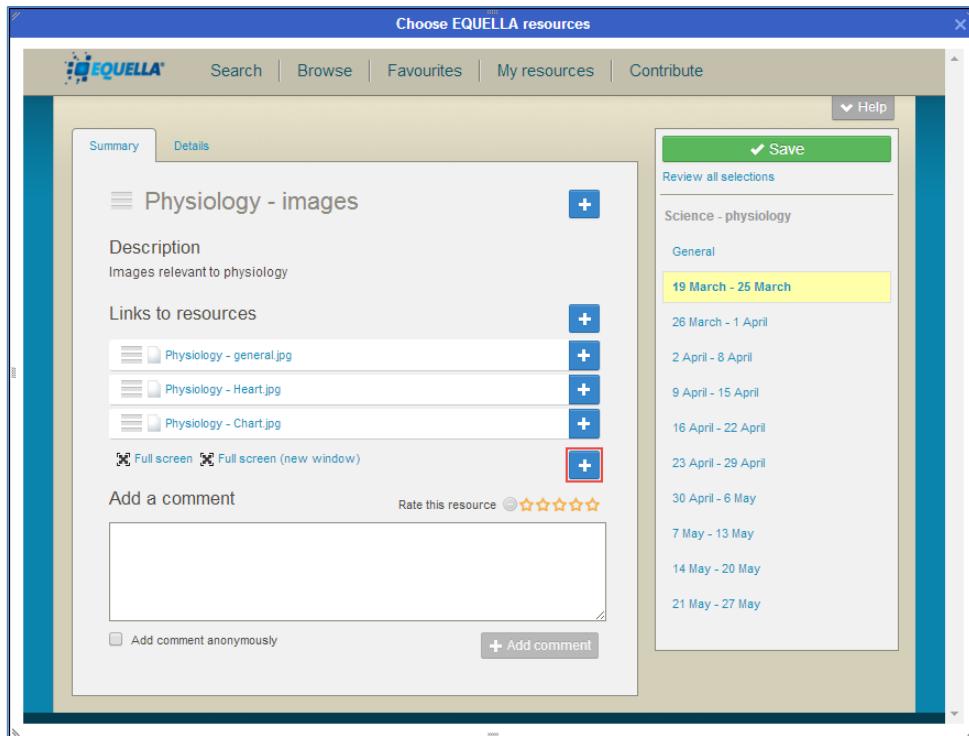
**Figure 84 Selecting attachments from search results page**

- **All attachments** (each showing as a single link in the course) can be selected by opening the summary page, then clicking the **+** button beside the Links to resources heading (see [Select all attachments](#) on page 61 for further information). An example is shown in Figure 85.



**Figure 85 Selecting 'All attachments' button from the summary page**

- **Select package** (showing as a single link that displays as a package in the course) can be selected by opening the summary page, then clicking the **+** button underneath the attachment list (see [Select package](#) on page 61 for further information). An example is shown in Figure 86.



**Figure 86 Selecting package from summary page**

## Selection using drag and drop

Users can also drag and drop Resource summary pages and attachments to the required course location.

### To select resources or attachments using drag and drop

1. Point anywhere on the required resource title bar (except the name link) or anywhere on the required attachment except the name link and + button and click and drag to the required course location.

*NOTE: The user can drag to any course location, not just the one that is currently highlighted.*

## Viewing and saving selections

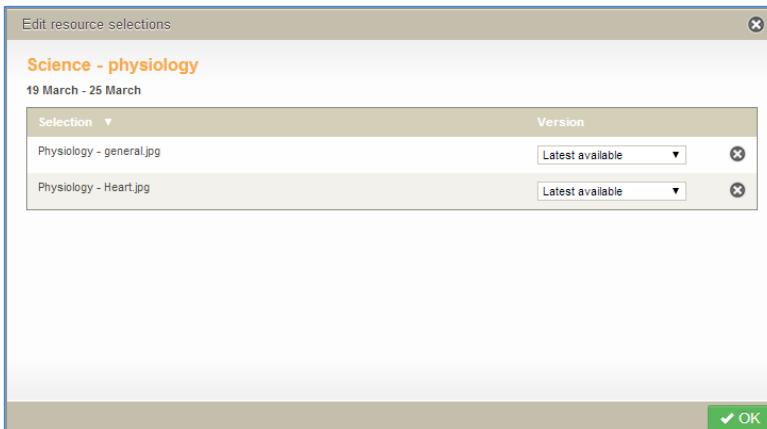
As items are selected, an animation displays on the screen, showing the selected item being added to the highlighted course. A number count displays beside the course location as items are selected. An example is shown in Figure 87.



**Figure 87 Item count**

To view and edit the items selected for one course location

1. Click the required course location list (e.g. *19 March – 25<sup>th</sup> March*). The **Edit resource selections** dialog displays. An example is shown in Figure 88.



**Figure 88 Edit resource selections**

- Click to remove selections.
  - Use the version drop-down to change the version option. This option may not be available for some users, depending on how the institution version defaults are configured.
2. Click to save changes and/or close the dialog.

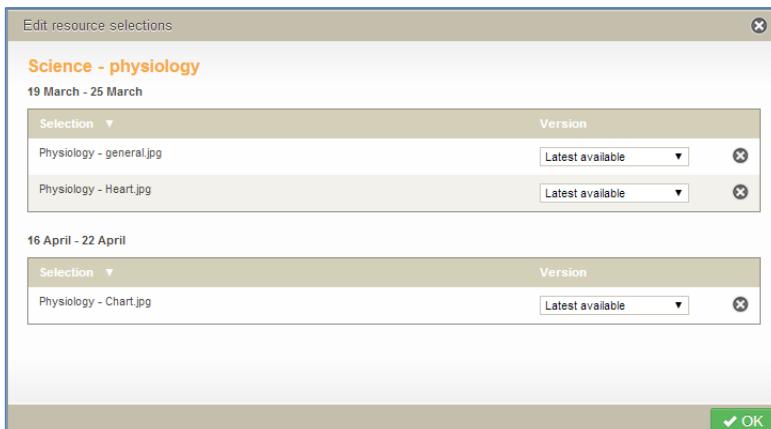
To view and edit all selections in a selection session

1. Click the **Review all selections** link at the top of the LMS panel. An example is shown in Figure 89.



**Figure 89 Review all selections link**

The **Edit resource selections** dialog displays, showing all course locations where selections have been added. An example is shown in Figure 90.



**Figure 90 Edit resource selections - multiple course locations**

- Click to remove selections.
  - Use the version drop-down to change the version option. This option may not be available for some users, depending on how the institution version defaults are configured.
2. Click to save changes and/or close the dialog.

## To save selections

- Once all selections have been made for a selection session, click to close the Integration page and add the selections to the course locations. An example is shown in Figure 91.

The screenshot shows a Moodle course page for 'Science - physiology'. The left sidebar contains a navigation menu with options like 'Home', 'Site pages', 'My profile', 'Current course' (which is expanded to show 'SCPH' with sub-options like 'Participants', 'Badges', 'General', and dates from '19 March - 25 March' to '30 April - 6 May'), 'My courses', and 'Administration'. The main content area displays a weekly outline from '19 March - 25 March' to '7 May - 13 May'. Each week section contains a 'News forum' link and one or more resource links, such as 'Physiology - general jpg' and 'Physiology - Heart.jpg'. On the right side, there is a sidebar with links for 'Search forums', 'Advanced search', 'EQUELLA Search', 'Search EQUELLA', 'EQUELLA Tasks' (showing 'All notifications - 1' and 'Resources that were rejected - 1'), and 'EQUELLA Links'.

**Figure 91** Moodle course page with new links

## Managing resources in Moodle

Resources added to the Weekly outline can be managed using either the icons provided or options from the **Edit** menu when editing is turned on.

- Click the icon to the left of the link to drag the link either within the outline pane or to a different week within the current course.
- From the **Edit** menu:
  - Select **Edit settings** to display the **Updating EQUELLA Resource in x location** page. Resource details can be edited here. More information is provided in the [Edit resource details](#) section on page 70.
  - Select **Move right** or **Move left** to change the position of the link within the course location.
  - Select **Hide** to hide the link from other users. Select **Show** to make the link visible again.
  - Select **Duplicate** to make a copy of the resource.
  - Select **Assign roles** to display the **Assign roles** page to configure local Moodle roles to assign to the resource.
  - Select **Delete** to remove the link from the Moodle course location. This action requires confirmation before the link is deleted.

### To view a resource

1. Select the title link to display the resource selected in a new screen. Depending on the type of resource (pdf, docx, jpg, etc.), the object will display using a default viewer. EQUELLA summary pages display using the EQUELLA Resource summary page. An example is shown in Figure 92.

The screenshot shows a resource summary page for 'Physiology - images'. The left panel displays the resource title, a brief description ('Images relevant to physiology'), and a list of attachments: 'Physiology - general.jpg', 'Physiology - Heart.jpg', and 'Physiology - Chart.jpg'. It also includes links for 'Full screen', 'Full screen (new window)', and 'Reorder attachments'. The right panel contains sections for 'Details' (Owner: Administration User, Collection: Learning resources, Version: 2 (show all), Status: Live) and 'Actions' (Add to external system, Archive this version, Change ownership, Clone item into a collection, Create a new version, Delete this version, Edit this version, Export, Modify key resource, Move item into another collection, New contribution of same type, Redraft this version, Suspend this version). There is also a 'Rate this resource' section with a 5-star rating.

Figure 92 Resource summary page

## Edit resource details

To edit the details of an EQUELLA resource

1. Select **Edit settings** from the **Edit** menu beside the resource to display the **Updating: EQUELLA Resource** page. An example is shown in Figure 93.

The screenshot shows the 'Updating EQUELLA Resource in 19 March - 25 March' page. In the General pane, the Name field is set to 'Physiology - Heart.jpg'. The Description field contains a rich text editor with various buttons. The 'Display description on course page' checkbox is checked. The Location field shows the URL 'http://alphabeta.equella.com/apac/integ/gen/b1360736-3202-4cb7-8770-7a8446db22f6/2?at'. Below the General pane, there are sections for Administration (Edit settings, Locally assigned roles, Permissions, Check permissions), Display options, and Common module settings. At the bottom, there are 'Save and return to course', 'Save and display', and 'Cancel' buttons. A note at the bottom says 'There are required fields in this form marked \*.'

**Figure 93 Updating EQUELLA Resource page**

This page includes the following options for editing EQUELLA items in the **General** pane:

- **Name**—edit the name of the resource in the **Name** field. (*NOTE: This field cannot be left blank; the asterisk \* indicates it is a mandatory field.*)
- **Description**—a brief description of the item can be entered or edited using the basic HTML editor provided.
- **Display description on course page** – select this checkbox to show the description on the course page.
- **Location**—the URL of the item is displayed and can be edited in the **Location** field.

When editing is complete, either:

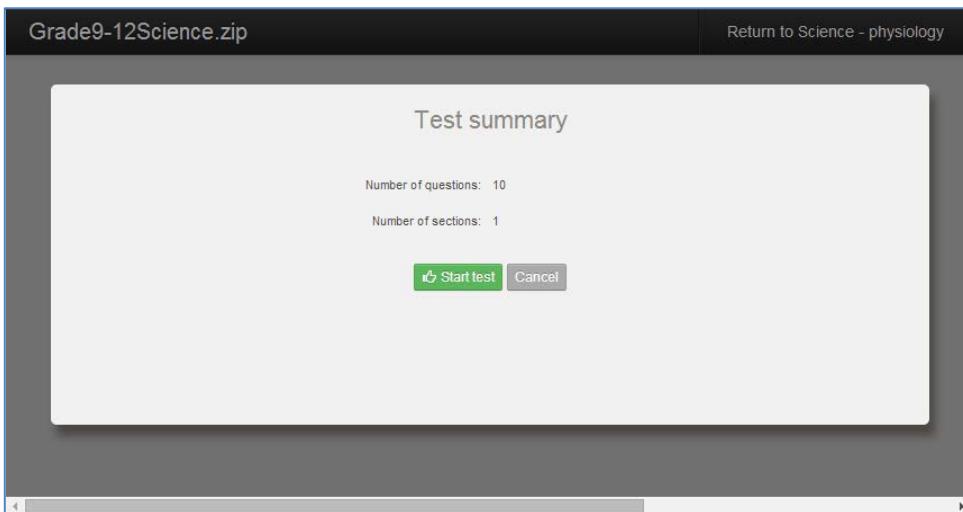
1. Click **Save and return to course** to save the resource; or
2. Click **Save and display** to save the item and display the resource **Summary** page, or
3. Click **Cancel** to return to the **Weekly outline** page without saving changes to the item.

## Playing QTI quizzes

When a QTI quiz link has been added to a course and that link has been selected, the quiz begins to play.

## To play a QTI quiz

1. Click the required quiz link from the course to launch the quiz start page. An example is shown in Figure 94.



**Figure 94 QTI Quiz launch page**

2. Click **Start test**. The first question displays. An example is shown in Figure 95.

A screenshot of the quiz interface after starting the test. The left sidebar shows a list of questions from "Question 1" to "Question 10", with "Question 1" currently selected and highlighted with a blue bar. The right pane displays "Question 1" with the title "Which of these is least important for a successful career in science and technology?". Below the title are four options, each preceded by a radio button:

- A creative imagination
- A solid knowledge base
- The ability to work with others
- Personal wealth

At the top of the right pane are "Submit test" and "Question 1" buttons, and at the bottom are "Prev" and "Next" navigation buttons.

**Figure 95 Example QTI quiz questions**

The question titles display down the left hand side of the page, and a single question's details show in the right-hand pane.

Note the following points:

- Once a question has been answered, a blue bar displays to the left of the question name in the left-hand question list.
- Unanswered questions have no bar.

- The question currently being viewed displays a grey bar to the left of the question name, until it is either answered or the user moves to another question.

An example is shown in Figure 96.

The screenshot shows a Moodle quiz interface. At the top left is a navigation bar with 'Grade9-12Science.zip' and a 'Submit test' button. At the top right is a 'Return to Science - physiology' link. Below the navigation bar, there's a section titled 'Section 1' containing ten questions numbered 1 to 10. 'Question 4' is highlighted with a blue background and a red vertical bar on the left. To the right of the section title is 'Question 4' with a 'Prev' and 'Next' button. Below the question number is a diagram of Earth's crust and mantle with arrows indicating convection currents. Labels include 'Ocean lithosphere', 'Crust', 'Ridge', 'Trench', 'Mantle', and 'Core'. Below the diagram is the question text: 'Which of these is the major source of energy for the convection currents in the Earth's mantle?'. There are four options with radio buttons:

- The sun
- Volcanoes
- Atmospheric pressure
- Radioactive decay

**Figure 96 Question status bars**

- Questions can be answered in any order.
- Clicking on the Return to x (where x is the course name) link in the top right corner of the page returns the user to the course.

*NOTE: If a quiz is begun then aborted for any reason, when the same user reenters the quiz, their prior answers are stored.*

- Once all questions have been answered, click the **Submit test** button to view the score acquired and any feedback available for that QTI quiz. Submitting the quiz also returns the result to the user's gradebook within Moodle.

*NOTE: Not all QTI quizzes are configured to display results or feedback once they are submitted.*

An example of a quiz which shows the score at the end is shown in Figure 97.

The screenshot shows a quiz results page titled "QTI Example package". On the left, under "Section 1", there is a list of questions: "Operating systems", "Question about EQUELLA", "Fabuland", "True/false question about geometry", and "What sort of triangle". Under "Section 2", there is a list of questions: "Identify the picture", "Jules Verne", "Survey", "Pick the false statement", and "The answer to...". A blue "View result" button is located at the top left of the left panel. On the right, the "Results" section displays the message: "You have reached the end of the test. Section 1 score: 29.0 (from a maximum of 50.0) Section 2 score: 30.0 (from a maximum of 50.0) Total score: 59.0 (from a maximum of 100.0)".

**Figure 97 Quiz results page**

Each question can be selected to view question level feedback, if included as part of the package. An example is shown in Figure 98.

The screenshot shows a question level feedback page titled "QTI Example package". On the left, the "Section 1" list includes "Operating systems", "Question about EQUELLA" (which is highlighted in blue), "Fabuland", "True/false question about geometry", and "What sort of triangle". Under "Section 2", there is a list of questions: "Identify the picture", "Jules Verne", "Survey", "Pick the false statement", and "The answer to...". A blue "View result" button is located at the top left of the left panel. On the right, the "Question about EQUELLA" section displays the question: "EQUELLA is made in:" followed by three radio buttons: "Zimbabwe", "Australia That's right, it's dinky-di true blue mate.", and "Antarctica". Navigation arrows for "Prev" and "Next" are located at the top right of this panel.

**Figure 98 Question level feedback**

To return to the results page, click **View result**.

# Repository

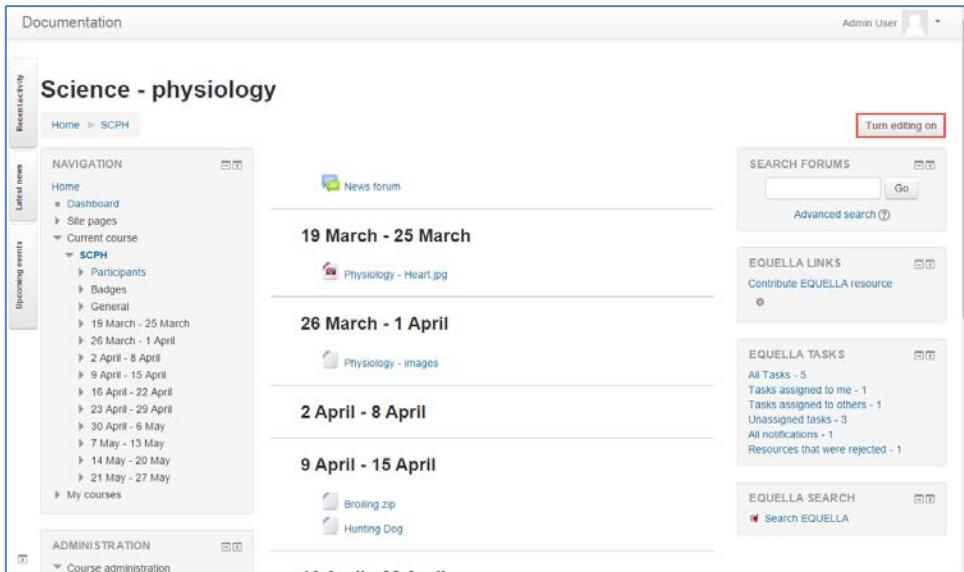
The EQUELLA repository can be used as a search destination for content-creation functionality within Moodle. Where previously images (and other resources) could only be added using Moodle's HTML editor from places such as the local hard drive, now EQUELLA has become a source of such material.

For information on how to set up the EQUELLA repository tool, refer to the *EQUELLA Moodle Configuration Guide*.

## To use the EQUELLA repository tool

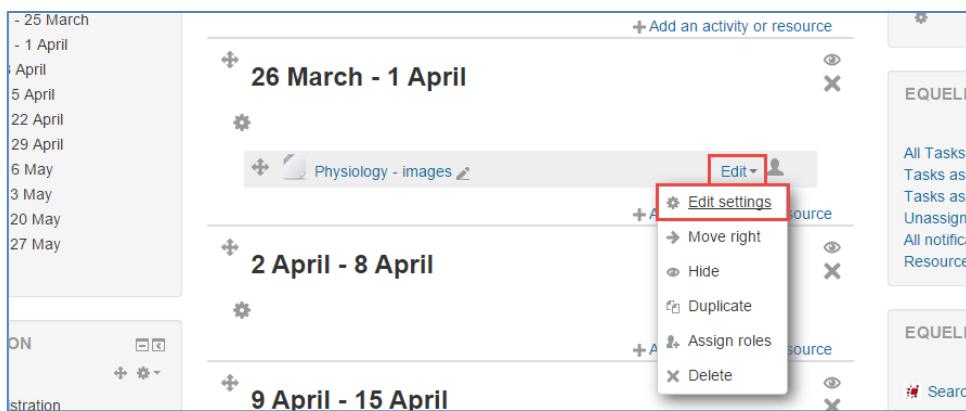
(Note: The EQUELLA repository tool works in conjunction with the Moodle HTML editor. These HTML editors exist in a number of places in Moodle, and this guide will refer to just one of those.)

1. On the Moodle Course page, click **Turn editing on**, as shown in Figure 99.



**Figure 99** Moodle course page

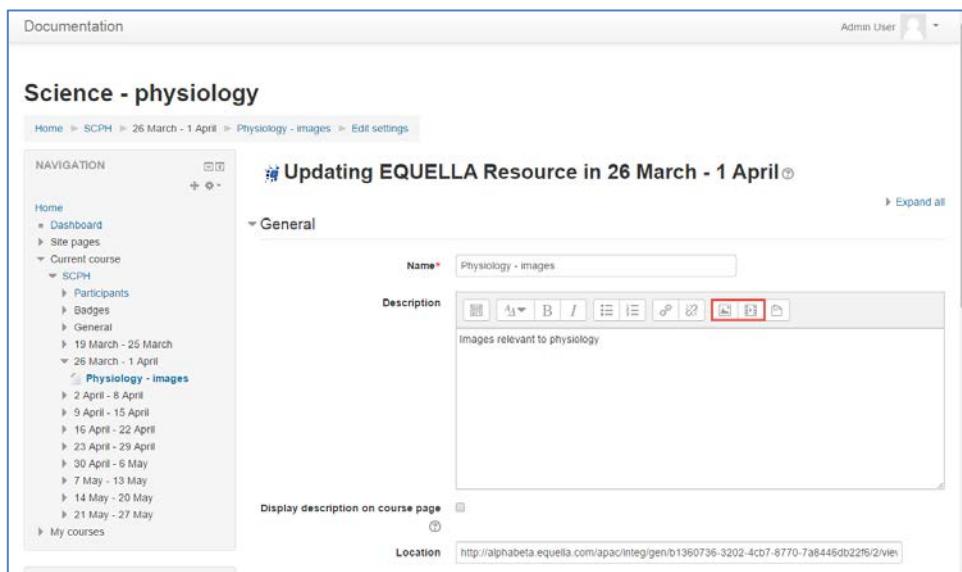
2. Select **Edit settings** from the **Edit** menu beside the required resource link. An example is shown in Figure 100.



**Figure 100 Moodle course page—Edit settings**

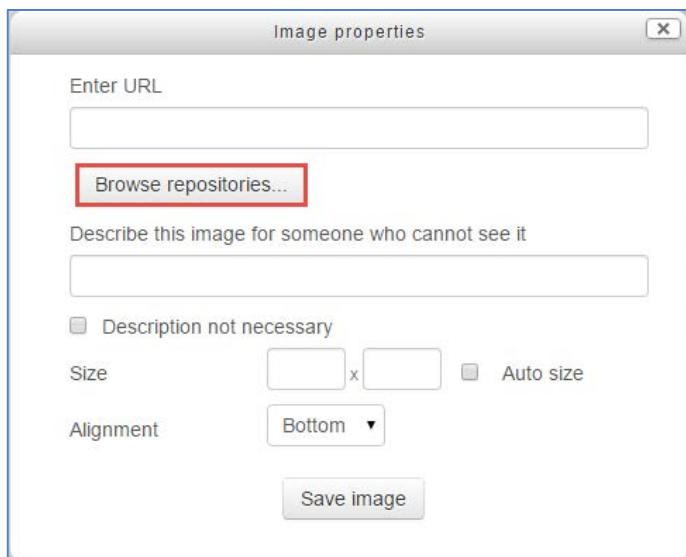
The **Updating EQUELLA Resource** page displays.

3. In the **Description** field, an HTML editor enables the creation of interesting descriptions that are more than just text. Click either the **Moodle Media** button or the **Insert/Edit Image** button An example is shown in Figure 101.



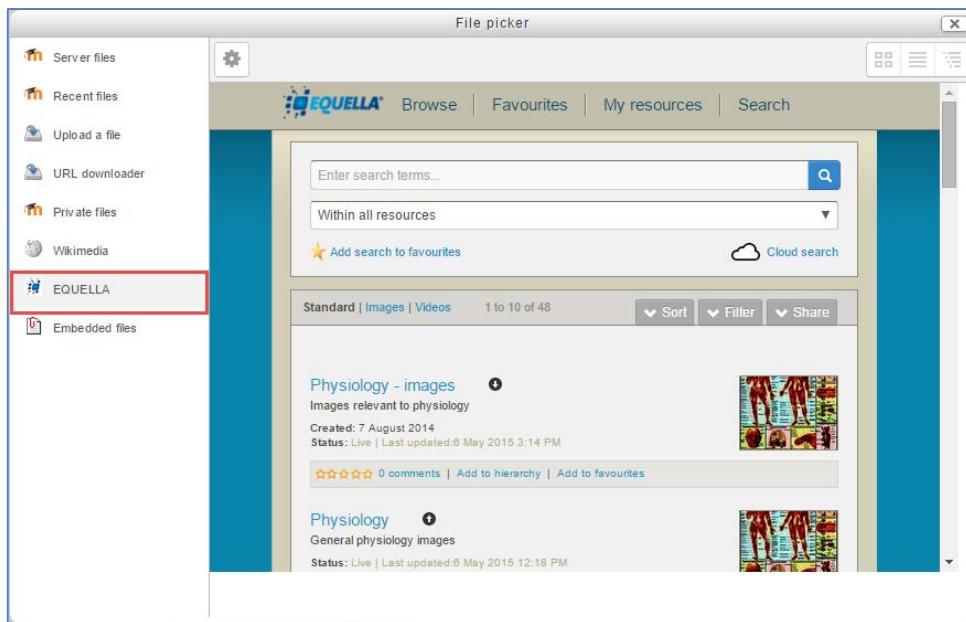
**Figure 101 Updating EQUELLA resource page**

4. In the **Image properties** dialog window that opens, click [Browse repositories...](#) as shown in Figure 102.



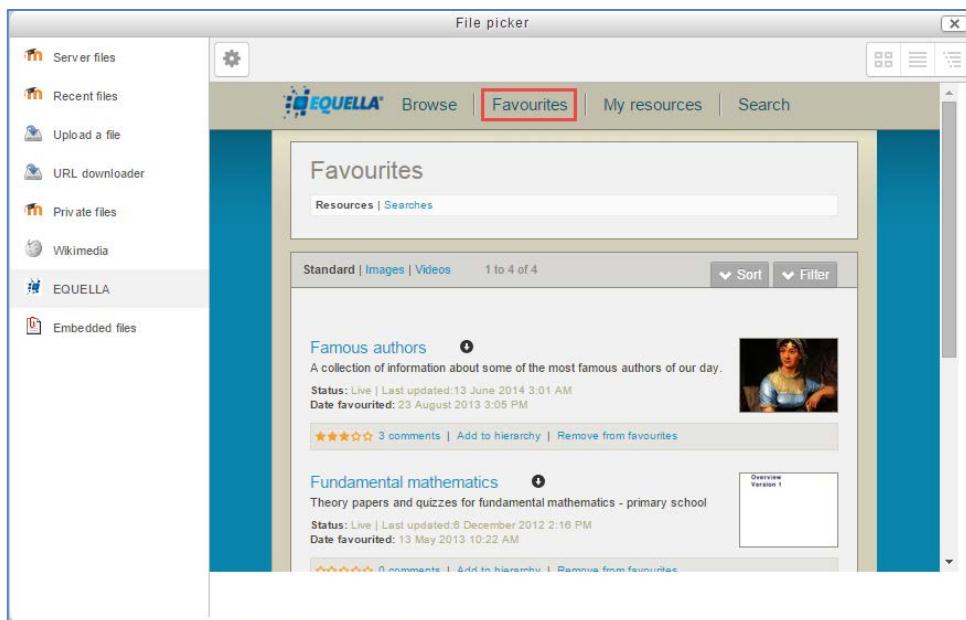
**Figure 102 Image properties dialog**

5. In the *File picker* window, select the relevant **EQUELLA** link (there may be more than one EQUELLA instance integrated with Moodle), as shown in Figure 103.



**Figure 103 File picker window**

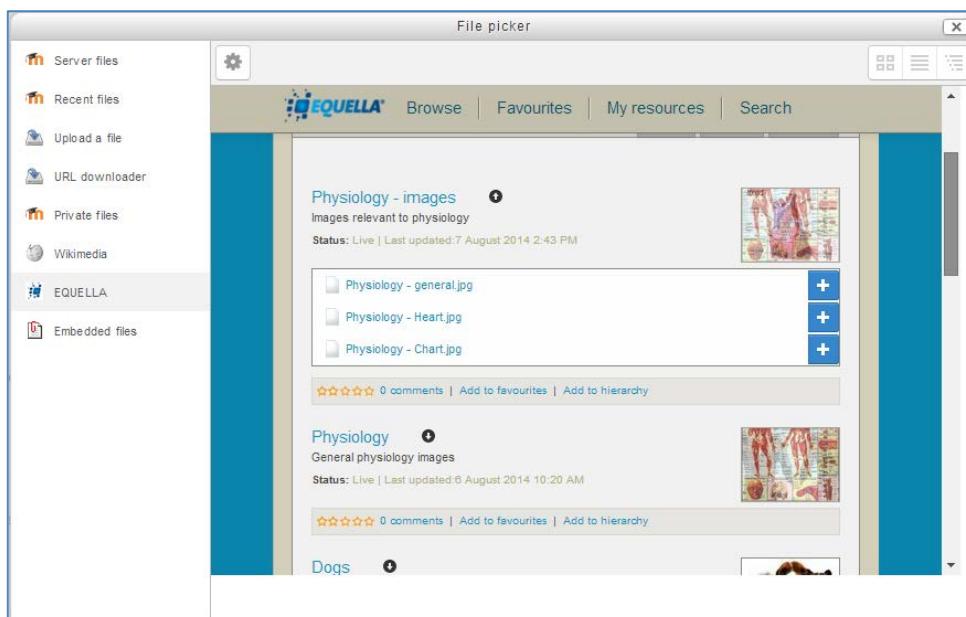
6. The page loads with all the resources matching a blank search query. The following elements are included on the page:
  - **Page links – Browse, Favourites, My resources and Search** (default). Select **Browse** to browse hierarchy topics and subtopics, **Favourites** to list the current user's favourite EQUELLA resources or searches or **My resources** to view the resources the current user owns. An example is shown in Figure 104.



**Figure 104 File picker – Favourites**

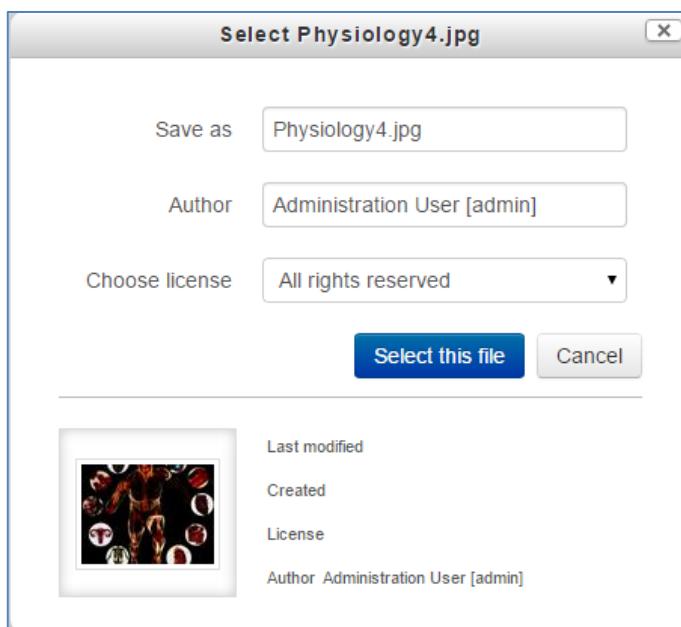
Select the **Search** link to return to the search page.

- **Search panel**—Enter keywords and/or select a specific collection or advanced search from the **Within** drop-down.
  - **Sort** and **Filter** drop-downs – see [Sorting and filtering](#) on page 35 for details.
7. Click the  icon from the results page or the resource title to display the list of attachments in the resource. An example is shown in Figure 105.



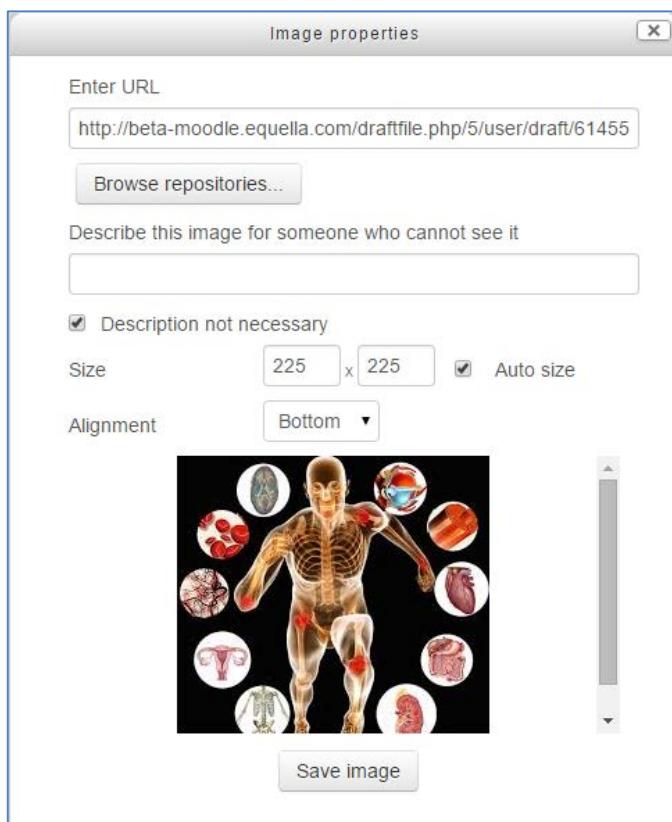
**Figure 105 Filer picker - Repository - Select attachment**

8. Select an attachment. This displays a details page. An example is shown in Figure 106.



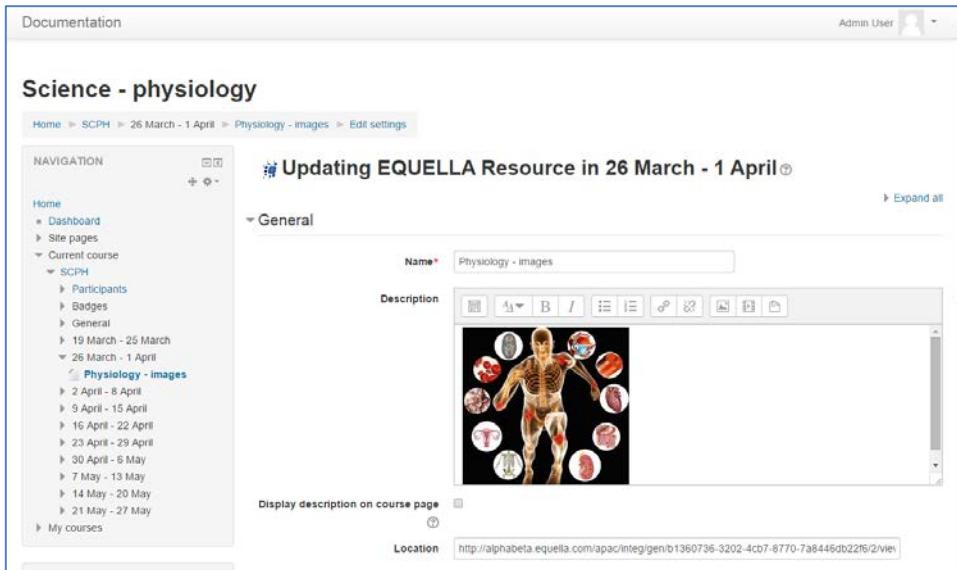
**Figure 106 Moodle file picker—resource details page**

9. Change the details if appropriate then click **Select this file**. The **Image properties** dialog displays with a preview of the attachment. Add a description in the **Describe this image for someone who cannot see it** field or select the **Description not necessary** checkbox. An example is shown in Figure 107.



**Figure 107 Image properties dialog**

10. Click [Save image](#) to return to the *Updating EQUELLA Resource* page. The imported media displays in the HTML editor, as shown in Figure 108.

A screenshot of the EQUELLA resource update interface. The title bar says "Documentation" and "Admin User". The main area shows a resource titled "Updating EQUELLA Resource in 26 March - 1 April". The "General" tab is selected. In the "Name" field, "Physiology - images" is entered. Below it, there is a rich text editor toolbar and a preview window showing a human figure with various internal organs like heart, lungs, and kidneys highlighted. Underneath the preview, there is a link "Display description on course page". At the bottom, there is a "Location" field with a URL and a "Save and return to course" button.

**Figure 108 Updating EQUELLA Resource with imported media**

11. Click [Save and return to course](#). The imported media has now been saved to the resource description field.

## Drag and drop/Auto add to EQUELLA

Files can be automatically contributed to EQUELLA when dragging and dropping onto a Moodle course page, or onto the **Content, Select files** panel from the **Adding a new File** page in Moodle. The system first checks to see if the file already exists in EQUELLA. If so, it creates a link to the file, otherwise it contributes the file into the collection allocated for the 'Quick contribute' function.

See the *EQUELLA Moodle Configuration Guide* for further information on configuring this feature.

### To drag and drop/auto add to EQUELLA

- From a Moodle Course page, click [Turn editing on](#) if not already enabled. An example is shown in Figure 109.

**Figure 109 Moodle Demo course page - Turn editing on**

2. Drag and drop the required file (e.g. Desert.jpg) onto the appropriate course week. A file destination dialog displays. An example is shown in Figure 110.

**Figure 110 Drag and drop file destination dialog**

The options are:

- **Contribute to EQUELLA** – contributes the file into the collection allocated for the Quick Contribute function in EQUELLA, with the file name as the resource name and description.
- **Add image to course page** – shows the full sized image on the course page instead of a link.
- **Create file resource** – saves the file locally (in Moodle).

3. Select **Contribute to EQUELLA** then click . The file is automatically contributed to EQUELLA. An example of *Desert.jpg* used in the above example is shown in Figure 111.

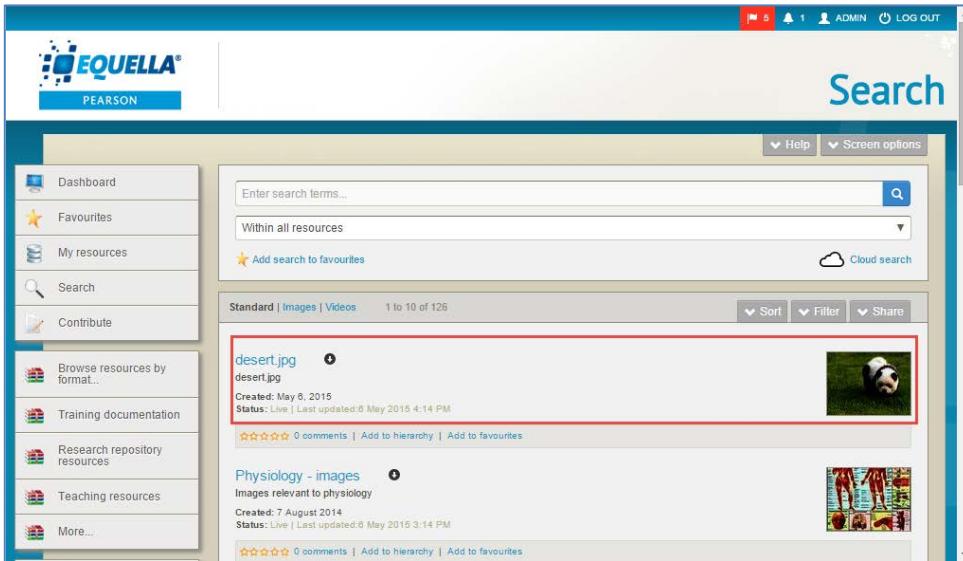


Figure 111 Example file automatically contributed to EQUELLA

## 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>.