

EQUELLA®

# Blackboard Learn User Guide

*Version 6.4*

## Document History

Document No.	Reviewed		Finalised		Published	
1			7/08/2015		7/08/2015	

August 2015 edition.

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## Table of Contents

Blackboard Learn™ overview .....	4
Blackboard My Institution page .....	4
EQUELLA portal .....	6
Accessing the EQUELLA repository .....	7
EQUELLA Integration screen .....	9
EQUELLA Integration screen elements .....	9
EQUELLA Integration pages .....	10
Search .....	10
Browse .....	15
Favourites .....	16
My resources .....	19
Contribute .....	20
Search results – Standard view .....	25
Modify key resource .....	28
Sorting, filtering and sharing results .....	29
Search results – Images view .....	34
Search results – Videos view .....	36
Resource summary page .....	38
Summary tab .....	39
Details tab .....	42
Actions .....	46
Large image viewer .....	52
LMS panel .....	52
Select and add resources to a course .....	53
Select buttons .....	53
Selecting items .....	57
Viewing and saving selections .....	60
Managing resources in Blackboard .....	62
Playing QTI quizzes .....	63
Edit resource details .....	67
Contact Client Support .....	68

# Blackboard Learn™ overview

EQUELLA is an advanced digital repository that can be integrated with Blackboard Learn™ (Blackboard). EQUELLA incorporates a digital repository and content authoring tools which enable users to search, create and manage content such as images, audio, video, packaged content, web links, text, PDFs and Microsoft Office™ documents. From within Blackboard, users can create and add EQUELLA resources to courses or contribute resources to the EQUELLA repository.

The purpose of this guide is to demonstrate to users how to integrate EQUELLA resources using Blackboard. Users will learn how to search for, create and manage available resources, and how to add these materials to courses. For information on integration of EQUELLA with Blackboard, refer to the *EQUELLA 6.4 Blackboard Learn Configuration Guide*.

Please note that this guide has been developed using EQUELLA version 6.4 and Blackboard version 9.1 (SP16) and as such may differ in appearance to your own installation. Contact the system administrator for access to extra features or to reconfigure your installation.

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## Blackboard My Institution page

### Login to Blackboard

1. Login to Blackboard. The Blackboard **My Institution** page displays. An example is shown in Figure 1. (*NOTE: To return to the My Institution page at any point, select the **My Institution** link at the top of the page.*)

**Figure 1 Blackboard My Institutions page**

Through Blackboard, EQUELLA can be reached via a course page or, if your institution has this feature enabled, directly via the **EQUELLA** portal on the **My Institutions** page.

All of the user's courses are listed in the **My Courses** portal on the **My Institutions** page, as well as in the **Course List** pane on the **Courses** page. Click the Course link to display the **Courses** page. An example is shown in Figure 2.

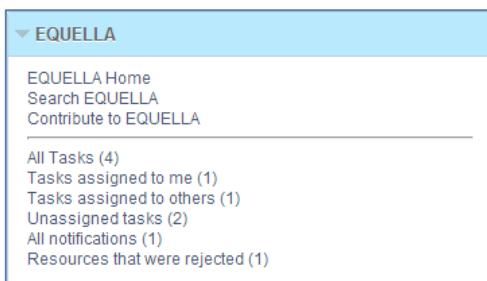
**Figure 2 Course List portal on Courses page**

Clicking the name of the course displays the course **Home page** where EQUELLA resources can be added, edited and managed.

## EQUELLA portal

The EQUELLA portal acts as an interface between Blackboard and EQUELLA. Listed in the portal are a number of links to pages in EQUELLA. Clicking these links will take the user directly to EQUELLA and away from Blackboard.

This portal will only be viewable if it has been enabled by your institution's Blackboard administrator. An example is shown in Figure 3.



**Figure 3 EQUELLA portal**

The EQUELLA portal may contain the following links:

- **EQUELLA Home**—selecting this link will display the EQUELLA Dashboard page.
- **Search EQUELLA**—selecting this link will display the EQUELLA Search page.
- **Contribute to EQUELLA**—selecting this link will display the EQUELLA Contribute page.
- **All Tasks (x)**—selecting this page will display the EQUELLA Tasks page without filtering.
- **Tasks assigned to me (x)**—selecting this link will display the EQUELLA Task list Tasks page filtered for only tasks assigned to the user.
- **Tasks assigned to others (x)**—selecting this link will display the EQUELLA Task list Tasks page filtered for only tasks assigned to other users.
- **Unassigned tasks (x)**—selecting this link will display the EQUELLA Tasks page filtered for only tasks not assigned to any users.
- **All notifications (x)**—selecting this link will display the EQUELLA Notifications page.
- **Resources that were rejected (x)**—selecting this link will display the EQUELLA Notifications page filtered for notifications of rejected resources.
- **Items that went live (x)**—selecting this link will display the EQUELLA Notifications page filtered for notifications of resources that became live.
- **Items that went into review (x)**—selecting this link will display the EQUELLA Notifications page filtered for notifications of resources marked for review.

For further information regarding tasks and notifications, see the *EQUELLA Workflow Moderation User Guide*.

# Accessing the EQUELLA repository

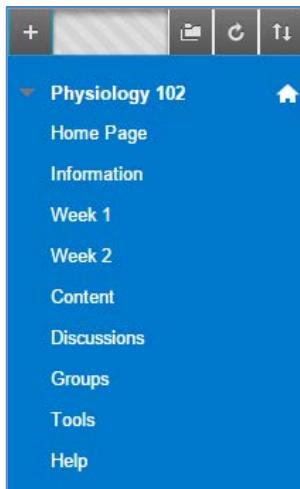
Resources stored in the EQUELLA repository can be added to any Blackboard course in the **Course List**. This is managed through the course **Home page** as outlined in the following steps:

1. Select the relevant course from the **My Courses** portal or from the **Courses** page. The course **Home page** is displayed. An example is shown in Figure 4.

The screenshot shows the Blackboard course Home Page for the course 'Physiology 102'. The left sidebar contains navigation links for the course, including 'Information', 'Week 1', 'Week 2', 'Content', 'Discussions', 'Groups', 'Tools', and 'Help'. Below these are sections for 'COURSE MANAGEMENT' such as 'Control Panel', 'Content Collection', 'Course Tools', 'Evaluation', 'Grade Center', 'Users and Groups', and 'Customization'. The main content area is titled 'Home Page' and includes sections for 'Add Course Module', 'My Announcements' (which states 'No Course or Organization Announcements have been posted in the last 7 days.'), 'My Tasks' (which states 'No tasks due.'), and 'What's New' (which states 'No Notifications'). On the right side, there is a 'To Do' section with a search bar for 'Select Date' set to '08/03/2015', and lists for 'Today (0)', 'Tomorrow (0)', 'This Week (0)', and 'Future (0)'. The status 'Last Updated: May 2, 2015 2:24 PM' is also visible. The top navigation bar includes 'My Institution', 'Courses' (selected), 'Community', 'Services', 'System Admin', and user information for 'Equella Admin'.

**Figure 4** Blackboard course Home Page

2. Select either **Information** link, the **Content** link or any other content pages (e.g. **Week 1**), from the course navigation menu, as shown in Figure 5. Content pages handle the addition of resources in the same way and have access to the **EQUELLA Object** tool required to access the EQUELLA repository. For the purposes of this guide, **Week 1** page will be used.



**Figure 5 Course navigation menu with Content pages**

3. Select the required content page from the **Course navigation menu** (e.g. Week 1).
4. Click the **Tools** drop-down to display a list of tools which can be used in the Blackboard course. An example is shown in Figure 6.

A screenshot of the Blackboard Week 1 content page. The left sidebar shows the course navigation menu with "Week 1" selected. The main content area displays a PDF document titled "Physiology 101" with the subtitle "An introduction to Physiology with". Above the content, there is a toolbar with icons for build content, assessments, and tools. A red box highlights the "Tools" dropdown menu, which is open and shows a list of tools: Discussion Board, Blogs, Journals, Wikis, Groups, Chat, Virtual Classroom, Tools Area, Achievements, Pearson's MyLab &amp; Mastering (Content), and EQUELLA Object. The "EQUELLA Object" option is also highlighted with a red box. The URL at the bottom of the screen is https://pearsonintegrationqa3.blackboard.com/webapps/blackboard/content/listContentEditable.jsp?content\_id=\_17555\_1&amp;course\_id=\_1570\_1&amp;mode=reset#aitMenu.

**Figure 6 Course Content page—Tools**

5. Select **EQUELLA Object**. The **EQUELLA Integration screen** displays. An example is shown in Figure 7.

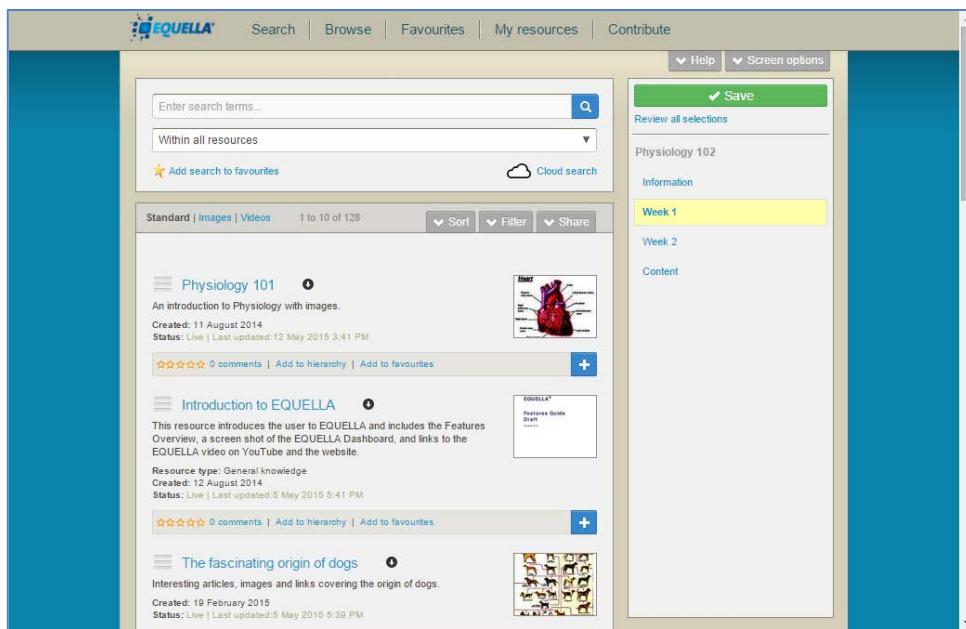


Figure 7 EQUELLA Integration screen

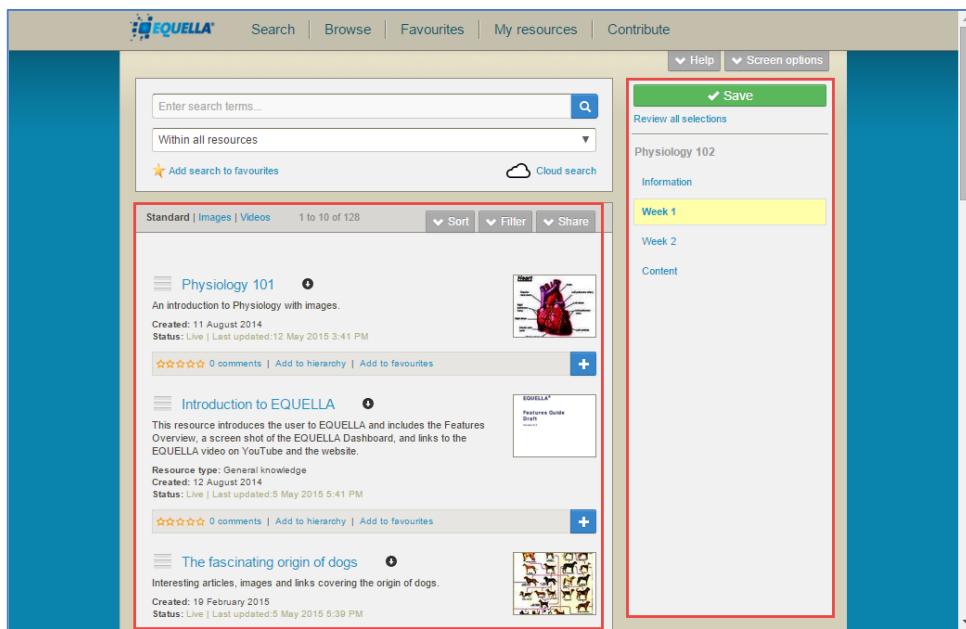
## EQUELLA Integration screen

The EQUELLA Integration screen 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 Blackboard 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 screen elements*

For the Search, Browse, Favourites and My Resources pages, the integration screen is made up of the **Search/Results panel** and the **LMS (Blackboard) panel**. An example is shown in Figure 8.



**Figure 8 Integration screen – Search/Results and LMS (Blackboard) panels**

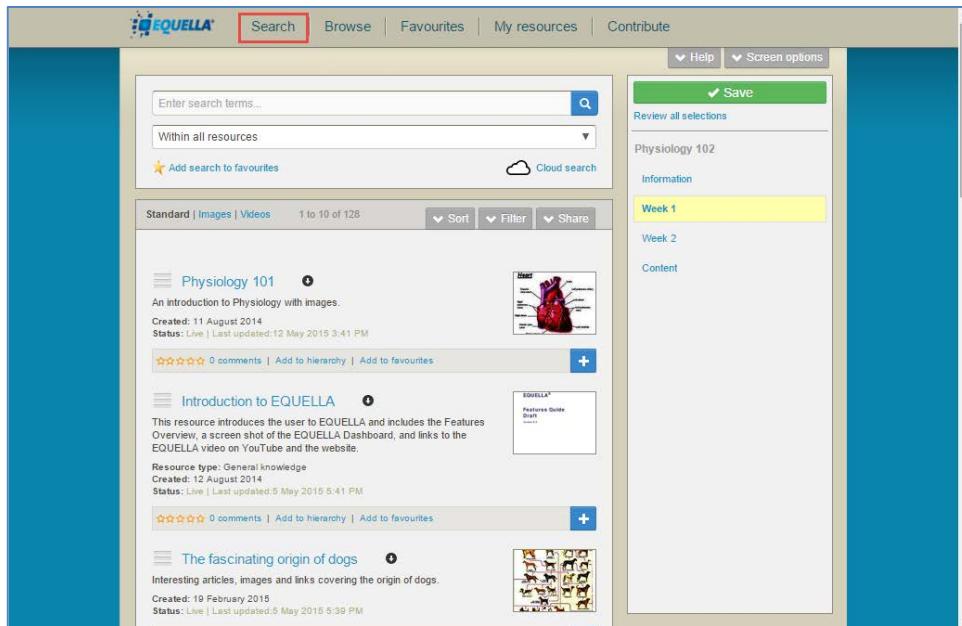
- Links are listed along the top of the screen, and can be selected to change the page view. Available pages are:
  - **Search** (default) – see [Search](#) on page 10 for further details.
  - **Browse** – see [Browse](#) on page 15 for further details.
  - **Favourites** – see [Favourites](#) on page 16 for further details.
  - **My resources** – see [My resources](#) on page 19 for further details.
  - **Contribute** – see [Contribute](#) on page 2016 for further details.
- The **Search/Results panel** has relevant search options for each page, and the *Results box* underneath.
- The **LMS** panel shows the **Course title**, and lists the **Course locations**. The course content page that the EQUELLA Integration screen was accessed from is highlighted and bolded. EQUELLA resources are selected and added to course content pages during the selection session. Selections can be previewed before they are saved to the course content pages by clicking the course content page 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 9.



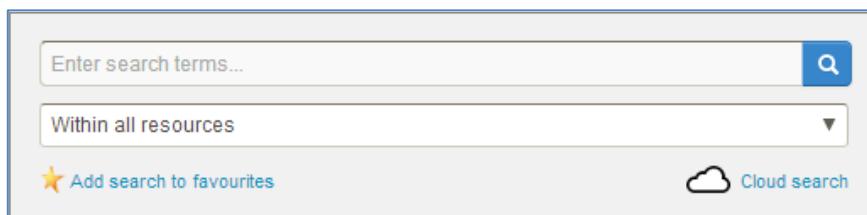
**Figure 9 Integration screen - Search link**

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 12 and [Advanced search](#) on page 13 for further information).
- **Add search to favourites** link – opens the **Add search to favourites** dialog (see [Adding or removing favourite resources](#) on page 17 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 10.



**Figure 10 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 11.

The screenshot shows the EQUELLA interface with a search bar containing 'physiology'. A dropdown menu 'Within all resources' is open. The search results list four items under the 'Physiology' category, each with a thumbnail image and a brief description. To the right, there's a sidebar with 'Save' and 'Review all selections' buttons, and a navigation panel with 'Information', 'Week 1' (highlighted), 'Week 2', and 'Content'.

**Figure 11 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 25 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 12.

The screenshot shows the 'Within' dropdown menu expanded. The 'Collections' section is highlighted with a red box. It lists various resource types: Within all resources, Books, eReserve articles, Journals, Learning resources, LTI Collection, and Teaching resources. The 'Advanced searches' section contains links to 'Learning resources advanced search' and 'eReserve'.

**Figure 12 Within drop-down – Collections**

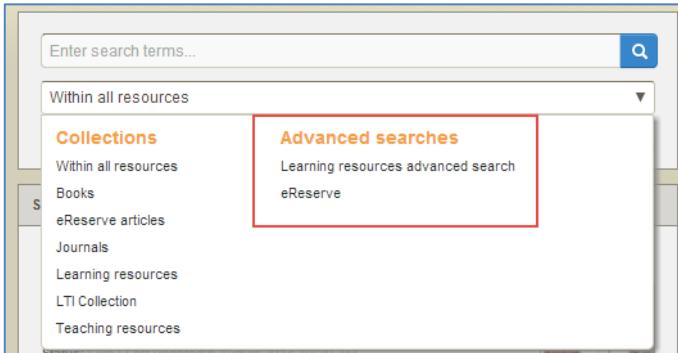
2. Select the required Collection to display only resources belonging to that collection.

## 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

3. Click the **Within** drop-down to display the available search categories. An example is shown in Figure 13.



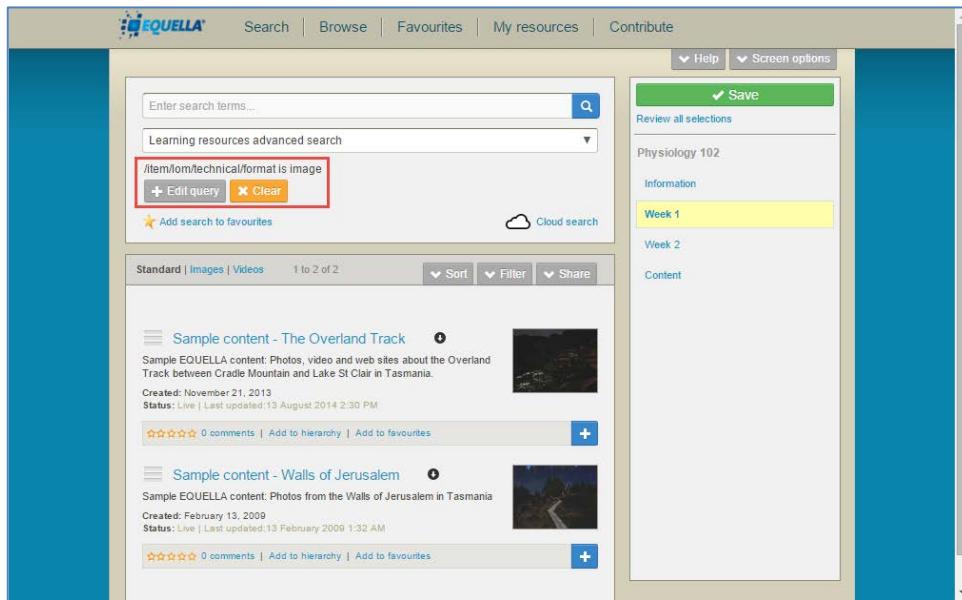
**Figure 13 Within drop-down - Advanced searches**

4. 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 14.

A screenshot of the EQUELLA interface showing the 'Learning resources advanced search' criteria page. The search bar at the top left contains 'physiology'. The search results panel on the right shows a list of items, with 'Week 1' highlighted in yellow. The search criteria panel on the left includes sections for 'Format of resource' (with checkboxes for Audio, Video, Image, Document, and Other), 'Aggregation level' (with checkboxes for Level 1 through Level 4), 'Learning resource type' (with checkboxes for various types like Diagram, Figure, Lab demonstration, Problem statement, Simulation, etc.), and a 'Search' button. At the bottom left, there's a link to 'Add search to favourites'. A status message at the bottom center says 'Found 6,797 cloud results'.

**Figure 14 Advanced search criteria page**

5. Select criteria (e.g. click *Image* in the **Format of resource** section) and click  at the bottom of the criteria page to display the search results page with search criteria in place. An example is shown in Figure 15.



The screenshot shows the EQUELLA search interface. In the top navigation bar, there are links for Search, Browse, Favourites, My resources, and Contribute. Below the search bar, a dropdown menu is open under 'Learning resources advanced search' with the option '/item/lom/technical/format is image' selected. A red box highlights this selection. To the right of the search bar is a 'Cloud search' button. On the left, the search results for 'Sample content - The Overland Track' and 'Sample content - Walls of Jerusalem' are displayed. On the right, a sidebar shows a 'Review all selections' section with a green checkmark and a 'Save' button. Below this, the course 'Physiology 102' is listed with sections for 'Information', 'Week 1' (which is highlighted in yellow), 'Week 2', and 'Content'.

**Figure 15 Advanced Search criteria in place**

An additional **Where** section is added to the **Search** pane, as shown in Figure 15.

6. Select  from the search pane to open the advanced search criteria page and change or refine the search criteria, or  to remove the criteria.

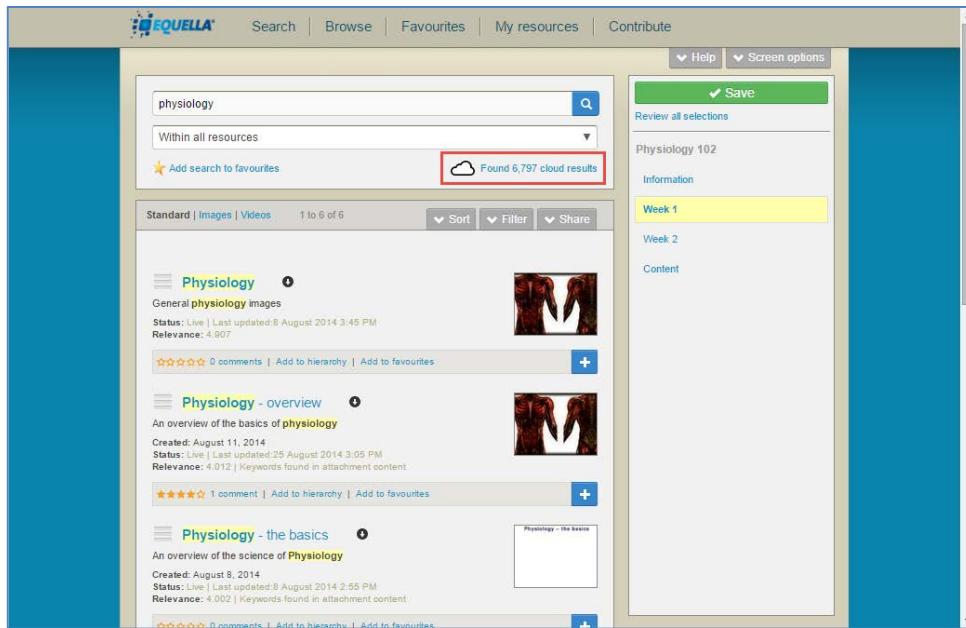
See the *EQUELLA Advanced Search Configuration Guide* for information on creating advanced searches.

## 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.

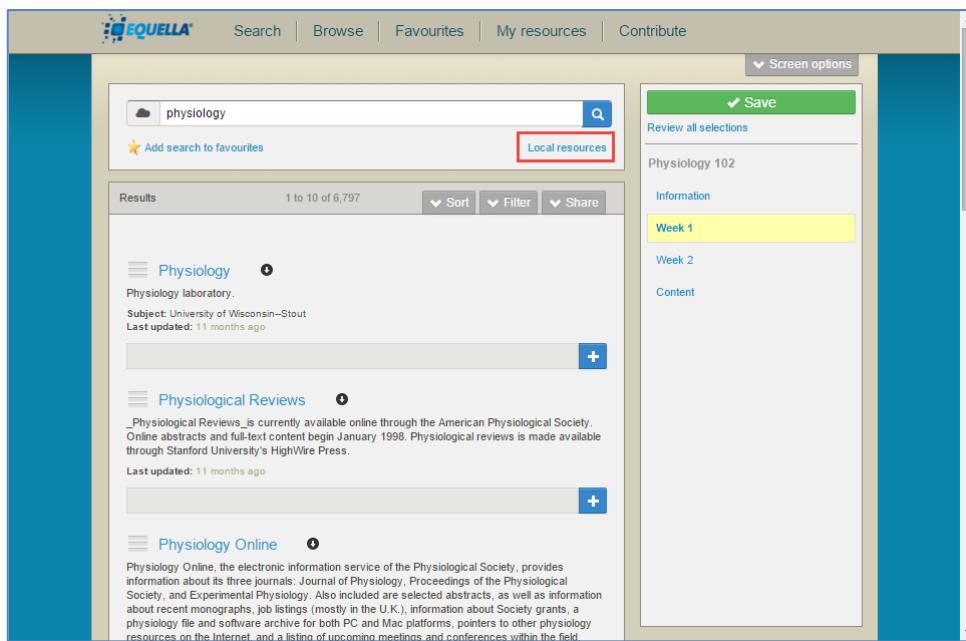
### To view Cloud results

- 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 16.



**Figure 16 Cloud results link**

2. Click the **Local resource** link to return to the local resource results. An example is shown in Figure 17.



**Figure 17 Cloud results with Local resources link**

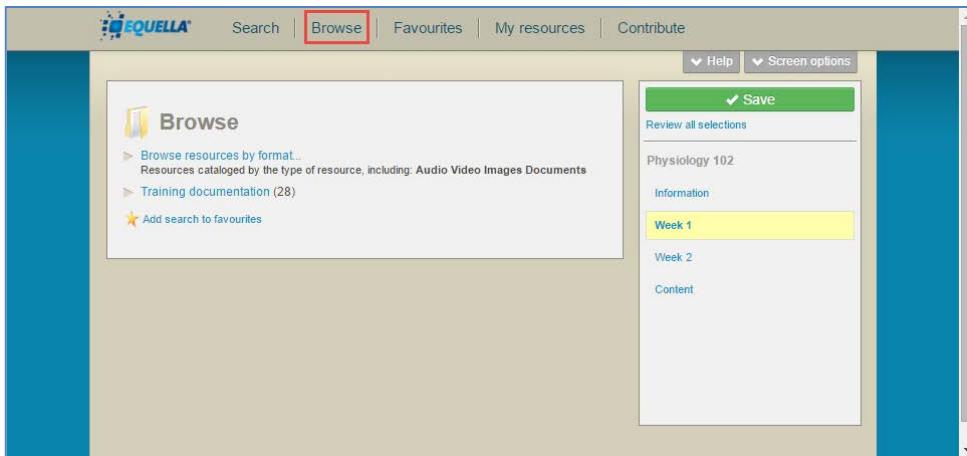
See the *EQUELLA Searching User Guide* for more information on searching.

## Browse

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

## To Browse EQUELLA resources

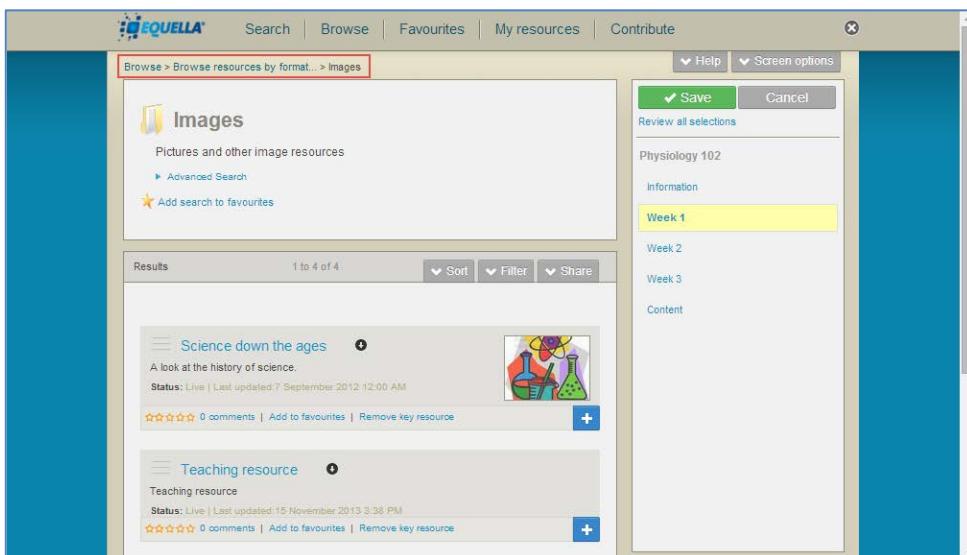
1. Select the **Browse** link from the top of the page. An example is shown in Figure 18.



**Figure 18 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 19.



**Figure 19 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 20.

The screenshot shows the EQUELLA interface. At the top, there are tabs: Search, Browse, **Favourites** (which is highlighted with a red box), My resources, and Contribute. Below the tabs, the main area is titled 'Favourites' with sub-sections 'Resources' and 'Searches'. There are filters for 'Standard', 'Images', and 'Videos', and sorting options. Two resources are listed:

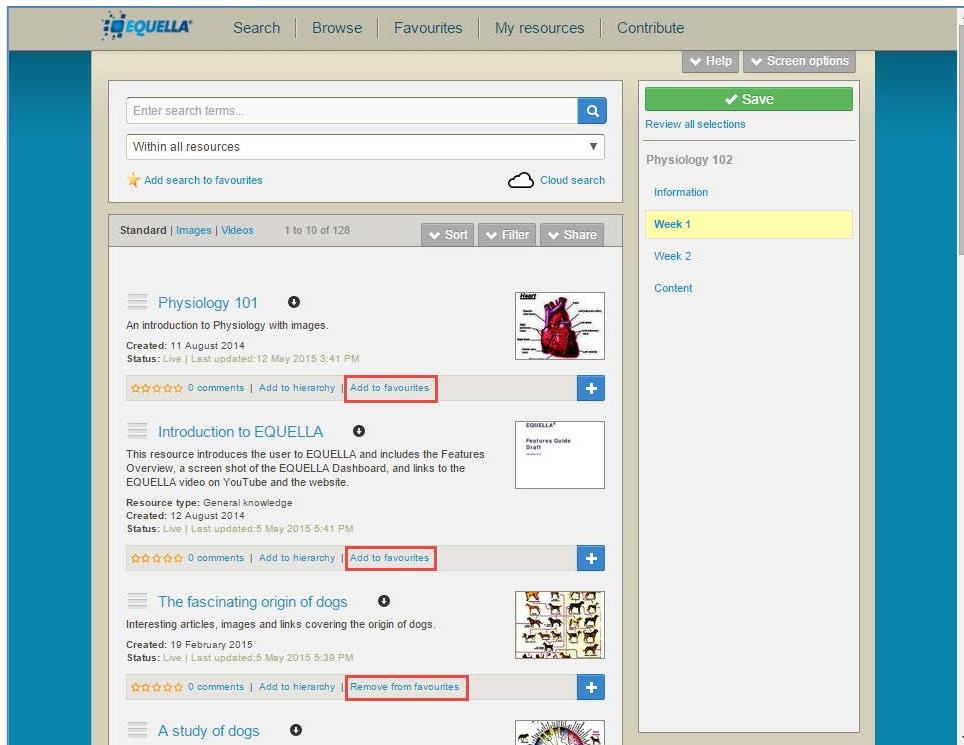
- Thylacine - Tasmania's extinct wild dog**: A short video of the history of the Thylacine. Created: 10 February 2015. Status: Live | Last updated: 17 April 2015 10:38 AM. Date favoured: 4 August 2015 4:07 PM. It has 0 comments. To the right is a thumbnail image of a thylacine.
- A study of dogs**: A short document covering an overview of the history of dogs, and some links to interesting information. Resource type: Exercise. Status: Live | Last updated: 5 May 2015 2:51 PM. Date favoured: 4 August 2015 4:07 PM. It has 0 comments. To the right is a thumbnail image of several dogs.

On the right side, there is a sidebar with 'Help' and 'Screen options' buttons. It also includes a 'Save' button and a 'Review all selections' section. This section lists 'Physiology 102' and 'Information'. Under 'Information', 'Week 1' is highlighted with a yellow background, while 'Week 2' and 'Content' are in regular text.

Figure 20 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 21.

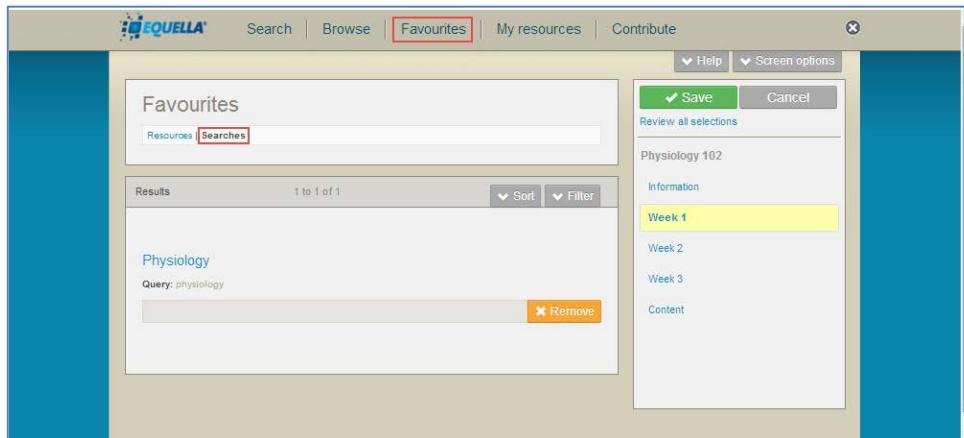


**Figure 21 Add to/Remove from favourites links**

## 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 22.



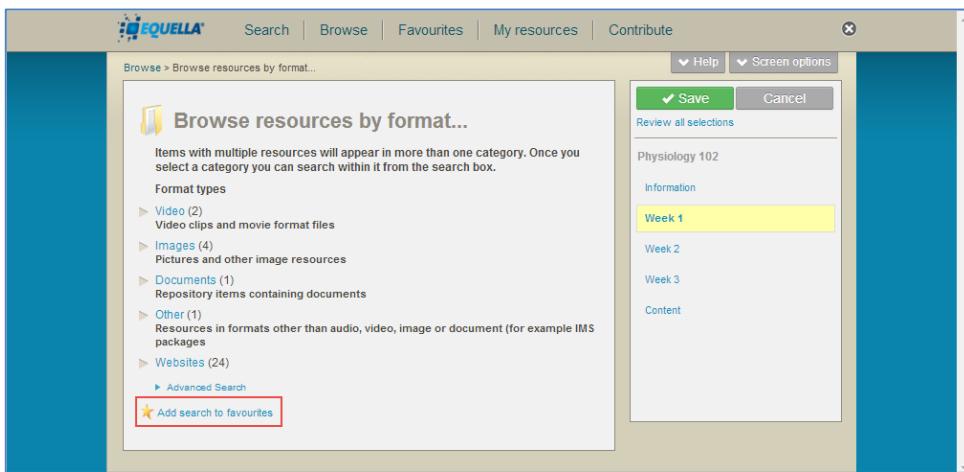
**Figure 22 Favourites - Searches page**

## Saving favourite searches

Useful searches can be saved as favourites by users.

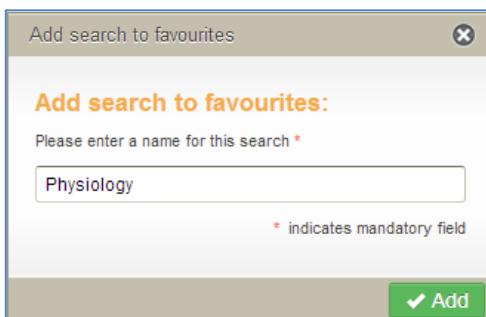
## To add a search to favourites

- 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 23.



**Figure 23** Browse page - Add search to favourites link

- The **Add search to favourites** dialog displays. An example is shown in Figure 24.



**Figure 24** Add search to favourites dialog

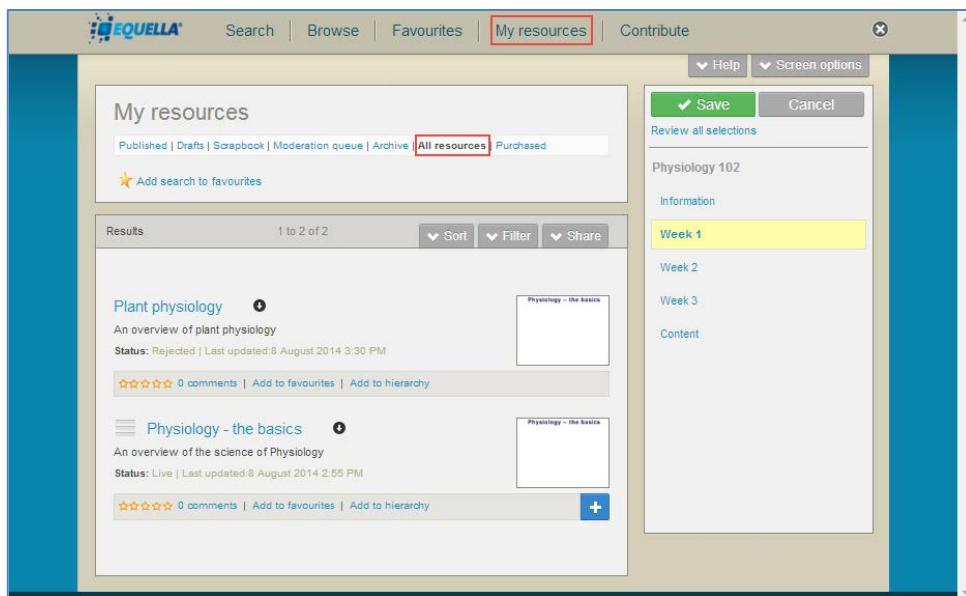
- Enter a name for the search, then click **✓ Add**. The search now displays on the **Favourites – Searches** page, as shown in Figure 22.

## 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

- Select the **My resources** link from the top of the page. The **My resources** page displays. An example is shown in Figure 25.



**Figure 25 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 Blackboard 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*.

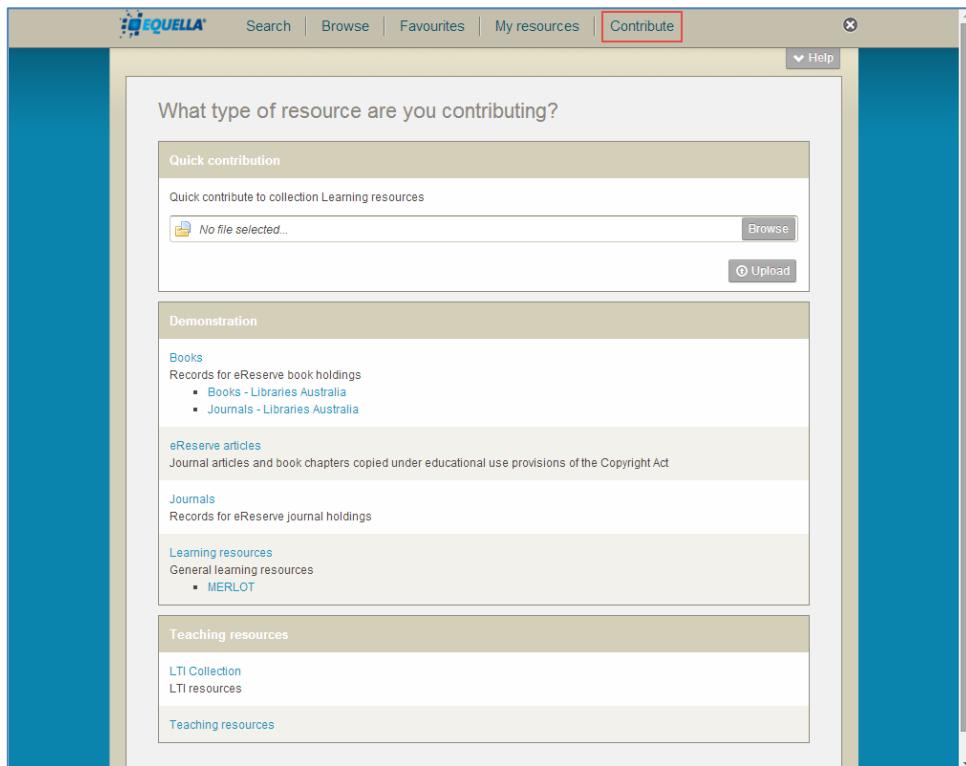
See the *EQUELLA My Resources User Guide* for further information.

## Contribute

The **Contribute** page provides the ability to create a new EQUELLA resource that can then be selected and added to a Blackboard 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 26.



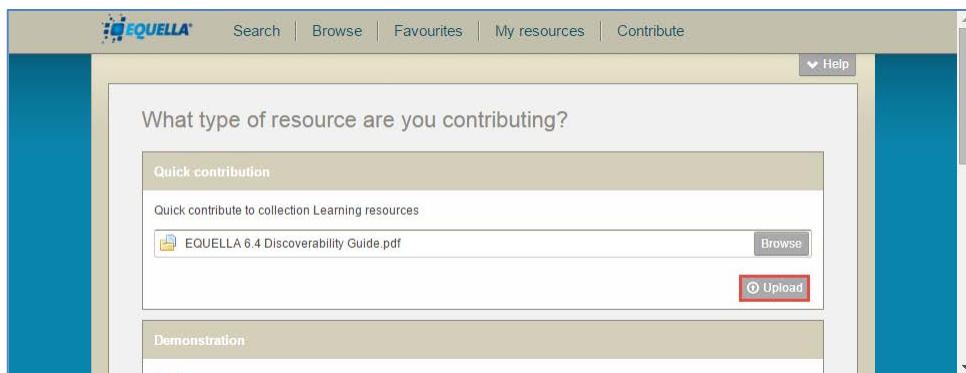
**Figure 26 Contribute page**

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 26.
2. In the **Quick contribution** panel, click **Browse** and locate and **Open** the required file.
3. Click **Upload**. An example is shown in Figure 27.



**Figure 27 Quick contribute - Upload a file**

The file is automatically added to the Blackboard course location the Integration screen was accessed from. An example is shown in Figure 28.

A screenshot of a Blackboard course page titled 'Week 1'. On the left, there's a sidebar with course navigation links like 'Home Page', 'Information', 'Week 1', 'Week 2', 'Content', 'Discussions', 'Groups', 'Tools', and 'Help'. The main content area shows a file titled 'EQUELLA 6.4 Discoverability Guide.pdf' with a small thumbnail icon. This file is highlighted with a red rectangular box.

**Figure 28 Blackboard course with Quick contribution file added**

Additionally, the file has been added into EQUELLA with the file name as the title and description. An example is shown in Figure 29.

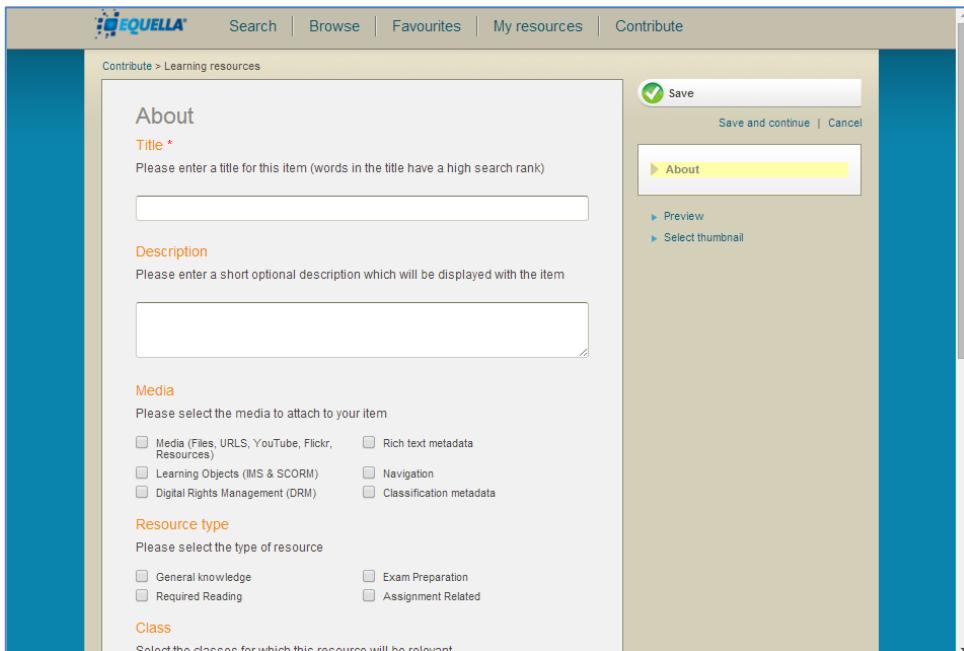
A screenshot of the EQUELLA search results page. The search bar at the top contains the term 'EQUELLA 6.4 Discoverability Guide.pdf'. Below the search bar, there's a list of results. The first result is the file from Figure 27, titled 'EQUELLA 6.4 Discoverability Guide.pdf'. It includes details such as 'Created: 4 August 2015', 'Status: Live | Last updated: 4 August 2015 4:17 PM', and a rating of 0 stars. Below this result, there's another entry for 'Physiology 101' with a thumbnail image of a heart diagram.

**Figure 29 Quick contribution as it appears in EQUELLA repository**

## Standard contribution

### To contribute a new EQUELLA resource

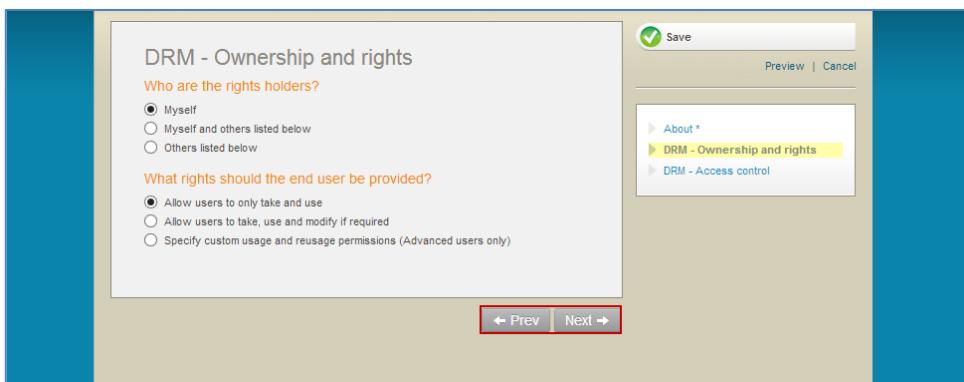
1. Select the **Contribute** link from the integration screen. The Contribute page displays. An example is shown in Figure 26.
2. Select a collection (e.g. *Learning resources*) from the list of collections to display a contribution wizard that will guide the user through the contribution process. An example is shown in Figure 30. Wizard controls will differ for each collection.



**Figure 30 Example contribution wizard**

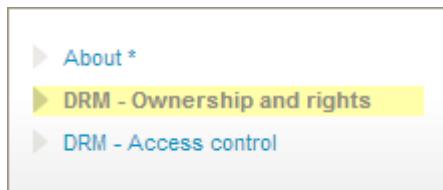
Contribution wizard elements can include:

- **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 31.



**Figure 31 Next and Prev 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 32.



**Figure 32 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

5. Click Save to display a dialog. An example is shown in Figure 33.



**Figure 33 Save dialog**

6. 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.
7. 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 35). If the collection selected for contribution is associated with a Moderation Workflow, the dialog shown in Figure 34 displays.



**Figure 34 Submit for moderation dialog**

Select **✓ Submit for moderation** to enter the resource into the moderation workflow. The **Summary** page displays with the Blackboard panel. An example is shown in Figure 35.

A screenshot of the EQUELLA integration screen showing the 'Summary' page for a resource titled 'Physiology - overview'. The page includes fields for 'Description' (an overview of the basics of physiology), 'Links to resources' (two files: 'Physiology1.jpg' and 'Physiology.docx'), and 'Add a comment' (a text area with a rating scale from 1 to 5 stars). To the right, a 'Blackboard' panel is visible, showing sections for 'Information' (with 'Week 1' highlighted in yellow), 'Week 2', and 'Week 3'. At the top of the screen, there is a navigation bar with links for 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'.

**Figure 35 Integration screen - Summary page**

## Search results – Standard view

An example of a Search results page is shown in Figure 36.

The screenshot shows the EQUELLA search interface. At the top, there's a search bar with placeholder text 'Enter search terms...', a dropdown menu set to 'Within all resources', and a 'Cloud search' button. Below the search bar, there are three resource cards:

- EQUELLA 6.4 Discoverability Guide.pdf**: Created on 4 August 2015, status live. It includes a thumbnail of the PDF cover and a rating of 0 stars.
- Physiology 101**: An introduction to Physiology with images. Created on 11 August 2014, status live. It includes a thumbnail of a heart diagram and a rating of 0 stars.
- 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. Resource type: General knowledge. Created on 12 August 2014, status live. It includes a thumbnail of the dashboard and a rating of 0 stars.

On the right side, a sidebar titled 'Physiology 102' shows course locations: 'Information' (selected), 'Week 1' (highlighted in yellow), 'Week 2', and 'Content'. There are also 'Save' and 'Review all selections' buttons.

**Figure 36 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 34 for further information) and Videos view (see [Search results – Videos view](#) on page 36).

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 38.
- - 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 41.

- **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 17 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 28 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 37. Depending on the context, links to other help topics can also display. Click the button again to hide the help pane.

The screenshot shows the EQUELLA search interface. At the top, there are navigation links: Search, Browse, Favourites, My resources, and Contribute. Below these are two buttons: Help (which is highlighted) and Screen options. The main content area is titled "Search" and contains a brief description of the search functionality. It includes sections for "Other page features" (with links to Sort, Filter, Save, and Share tabs) and "Choose EQUELLA resources" (with a search bar, filter dropdown, and a list of results). To the right, a "Help" pane is open, featuring a green "Save" button and a "Review all selections" link. Below this are sections for "Physiology 102", "Information", and "Week 1" (which is highlighted with a yellow background). Other sections like "Week 2" and "Content" are also listed.

**Figure 37 Help page**

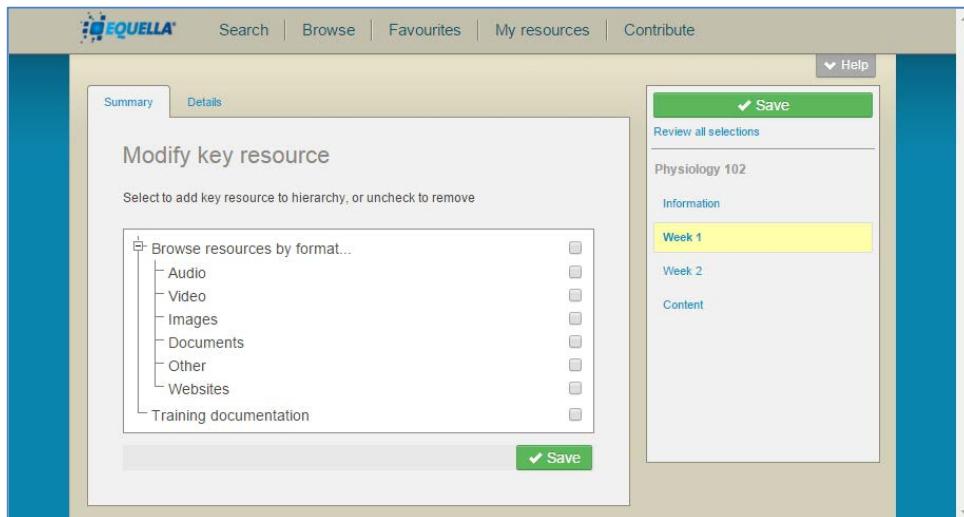
- —click the button to display the screen configuration options, which can include:
  - **Include results that are not live**—select the checkbox to display all results, regardless of their status. (*NOTE: This option will only display if set by your administrator. Additionally, only resources with a 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 38.

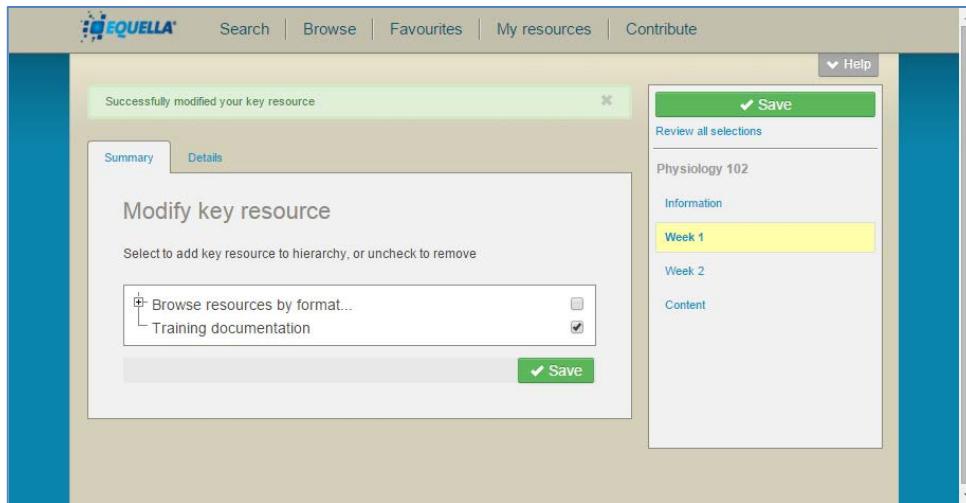


**Figure 38 Modify key resource page**

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 38.

*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 **Save**. A confirmation screen displays, as shown in Figure 39.



**Figure 39 Confirmation of Key resource modification**

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

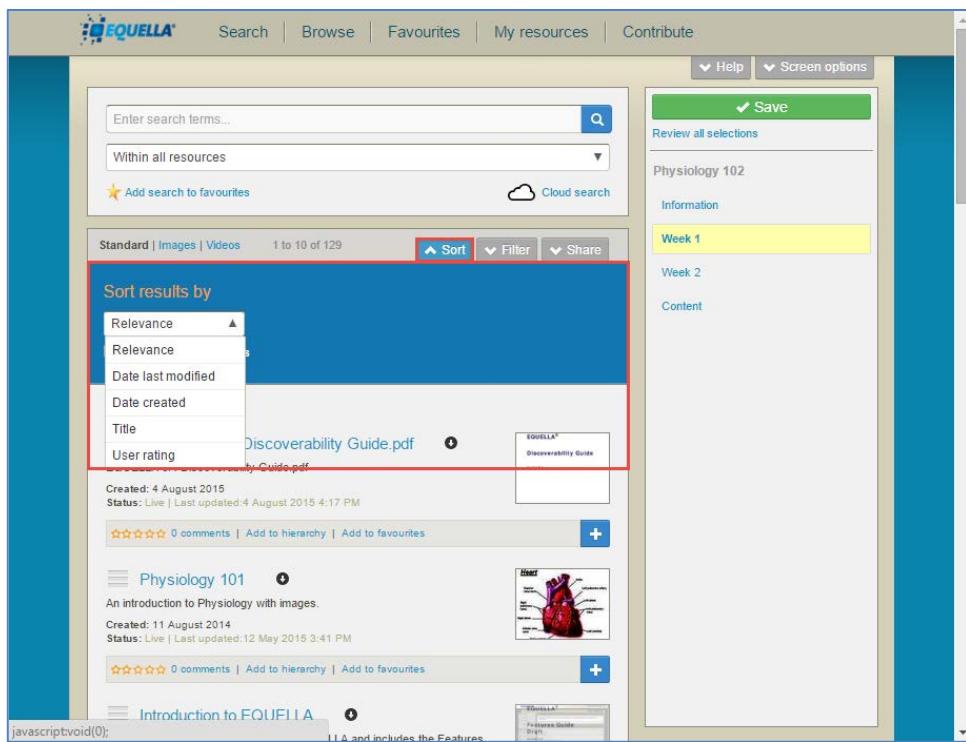
See the *EQUELLA Hierarchy Configuration Guide* for further information on hierarchies and key resources.

## ***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 40.



**Figure 40 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 41.

The screenshot shows the EQUELLA interface with a search bar at the top. Below it is a sidebar with 'Save' and 'Review all selections' buttons. The main content area displays a list of resources. A red box highlights the 'Filter' button in the toolbar above the list. To the left of the list, there are three filter sections: 'Filter by owner' (with a 'Selected user' dropdown), 'Filter by date modified' (with a 'After' dropdown and date input), and 'Filter by resource type' (with an 'Image' checkbox). The list itself includes a file named 'EQUELLA 6.4 Discoverability Guide.pdf' with details: Created: 4 August 2015, Status: Live | Last updated: 4 August 2015 4:17 PM. At the bottom of the list are 'Comments', 'Add to hierarchy', and 'Add to favourites' buttons.

**Figure 41 Filter options**

The following filters are available:

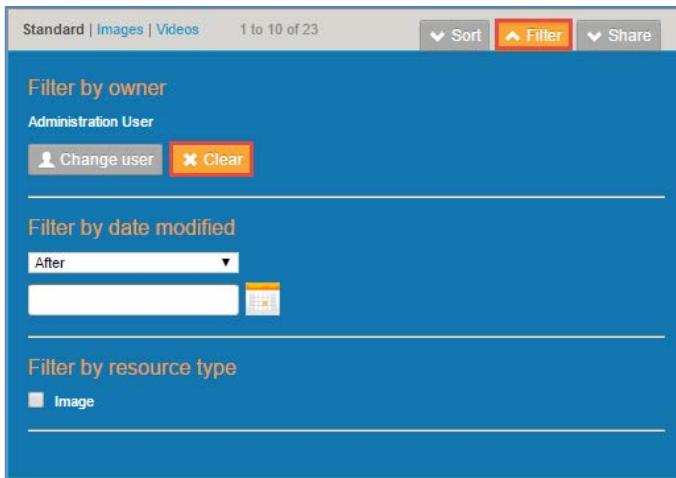
#### Filter by owner

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 42.

This is a modal dialog titled 'Select owner to filter by'. It contains a search bar with placeholder text 'The search query can contain a name (first, last or login) or a partial name with a wildcard character (nam\*)'. Below the search bar is a list of users with radio buttons next to their names. The list includes: Jo Bloggs (JBloggs), equellademo equellademo (equellademo), Greg Brown (GBrown), and int.demoteacher int.demoteacher (int.demoteacher). At the bottom right of the dialog is a green button labeled 'Select this user' with a checkmark icon.

**Figure 42 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 43.

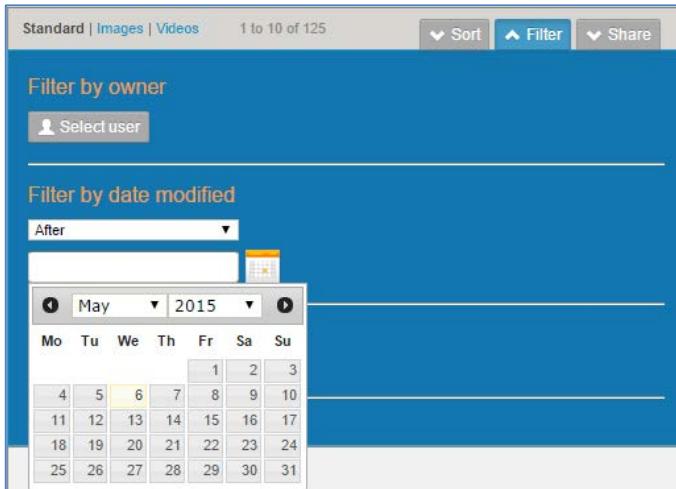


**Figure 43 Example with Owner filter set**

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 44.



**Figure 44 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 45.

The screenshot shows the EQUELLA search interface. At the top, there is a navigation bar with links for Search, Browse, Favourites, My resources, and Contribute. Below the navigation bar is a search bar with placeholder text "Enter search terms..." and a magnifying glass icon. A dropdown menu is open, showing "Within all resources". A red box highlights a message "91 records have been filtered out - clear filters". Below the search bar are buttons for "Add search to favourites" and "Cloud search". The main content area displays search results for "Physiology 101", "Introduction to EQUELLA", and "The fascinating origin of dogs". Each result card includes a thumbnail, title, description, creation date, update date, and status. At the bottom of the results list are buttons for "Sort", "Filter", and "Share". To the right of the results, there is a sidebar titled "Review all selections" with sections for "Information", "Week 1" (which is highlighted in yellow), "Week 2", and "Content". A green "Save" button is visible at the top of the sidebar.

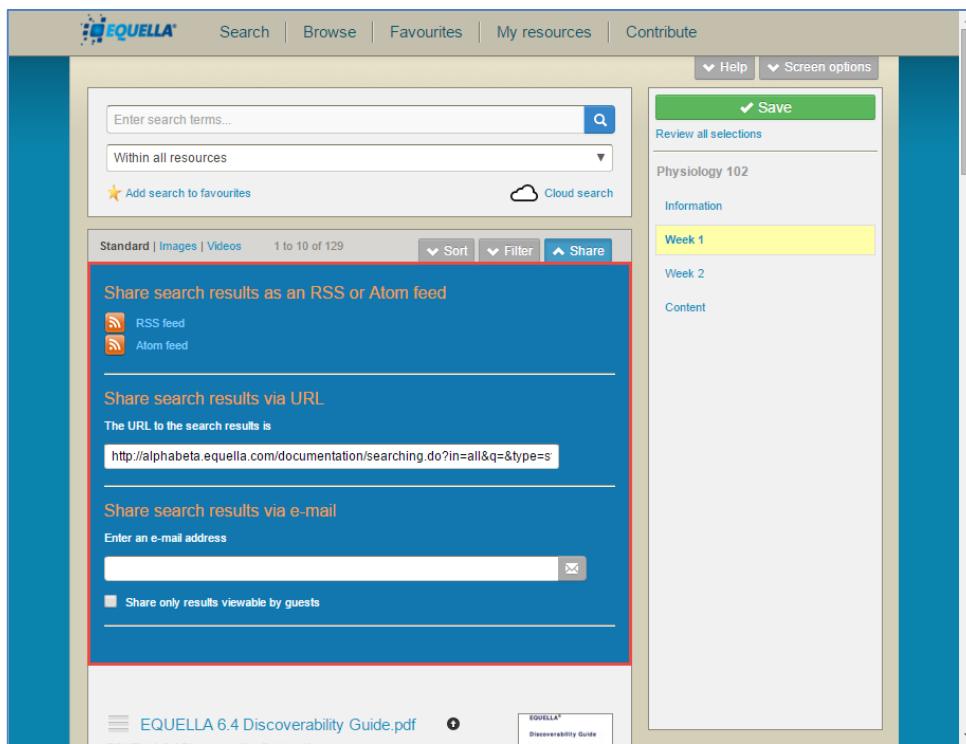
**Figure 45 Filtered results – message and tab highlight**

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 46.



**Figure 46 Share search results dialog**

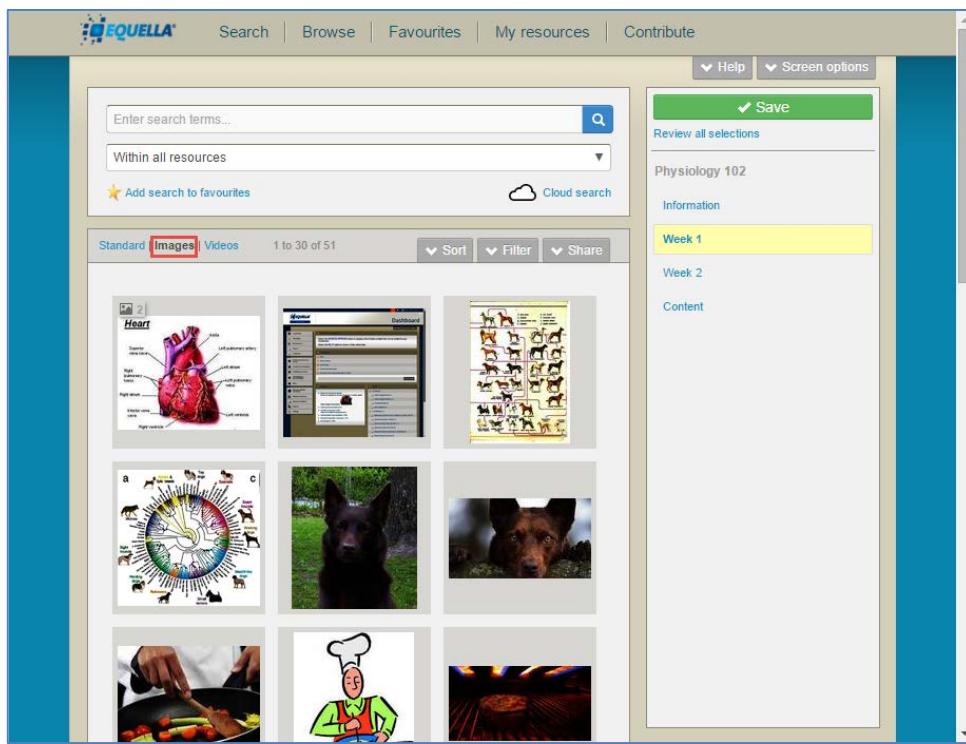
- **Share search results as an RSS or Atom feed**—selecting the **RSS feed** or **Atom feed** link will display a subscription page. Subscribed users are notified if resources are updated or added to the search results.
- **Share search results via URL**—users can send a link to the search results page 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 47.

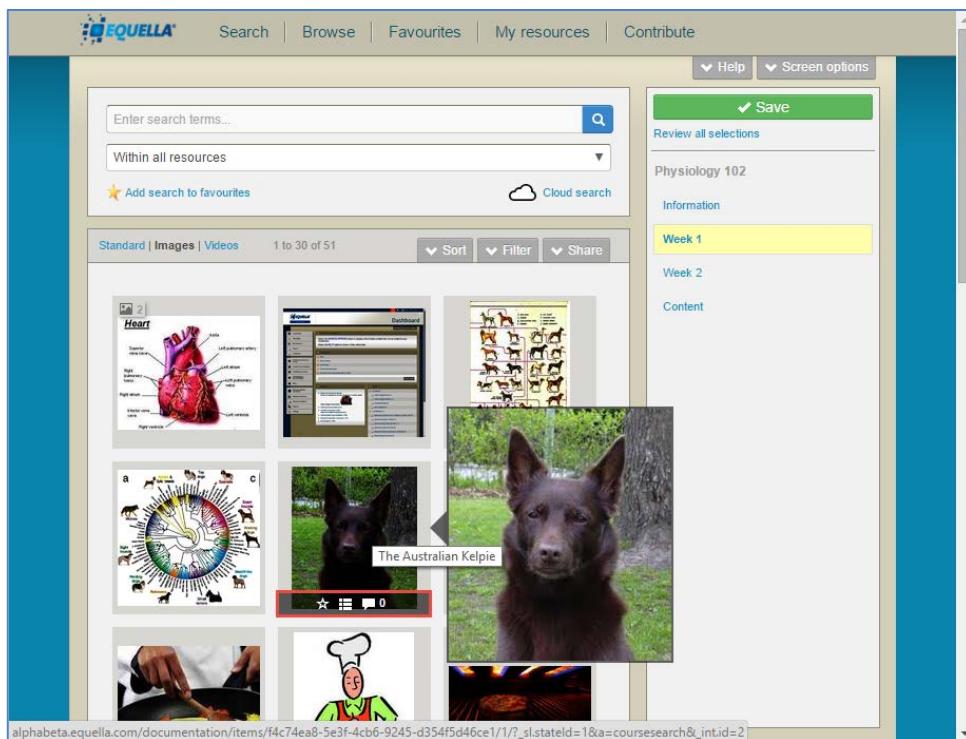


**Figure 47 Images view**

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 48.



**Figure 48 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 17 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 28 for further information).
- 💬 - Click to open the Resource summary page with a focus on the Comments section.

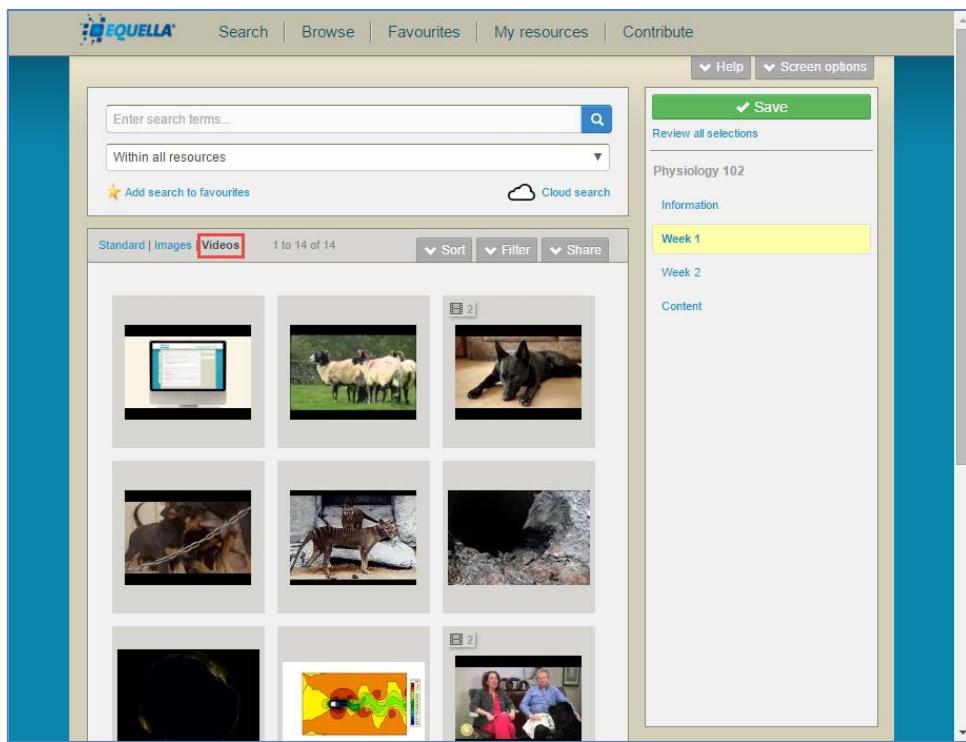
Click the thumbnail image to open the **Resource summary** page.

## 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 49.

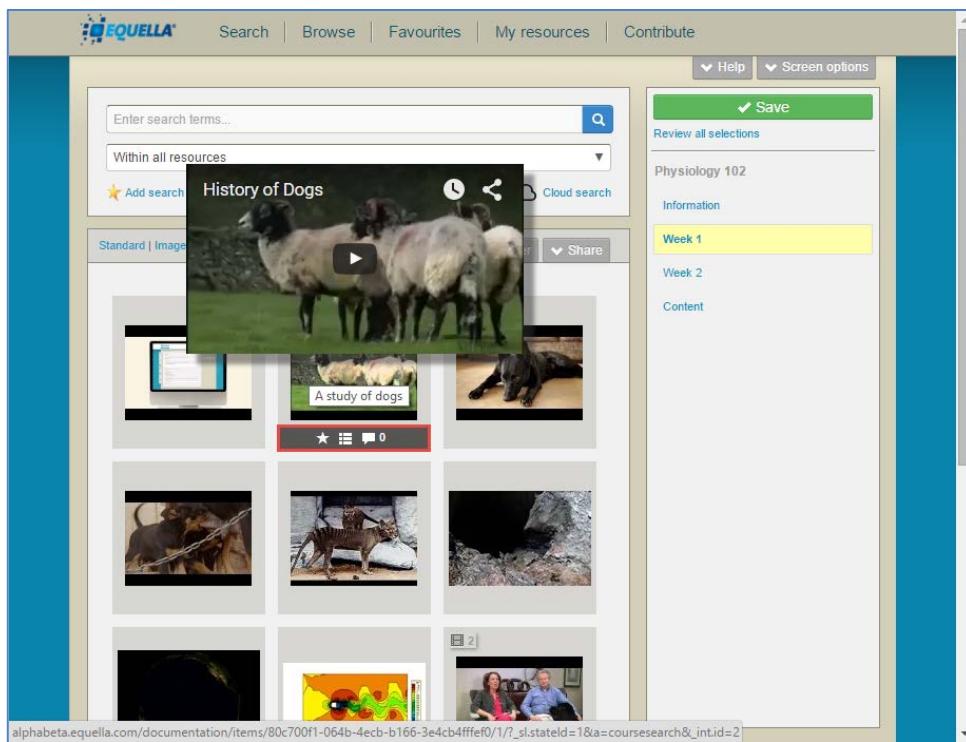


**Figure 49 Videos view**

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 preview. To stop playing the preview, point the mouse away from the preview box. An example is shown in Figure 50.



**Figure 50 Videos view - video enlarged with mouse hover**

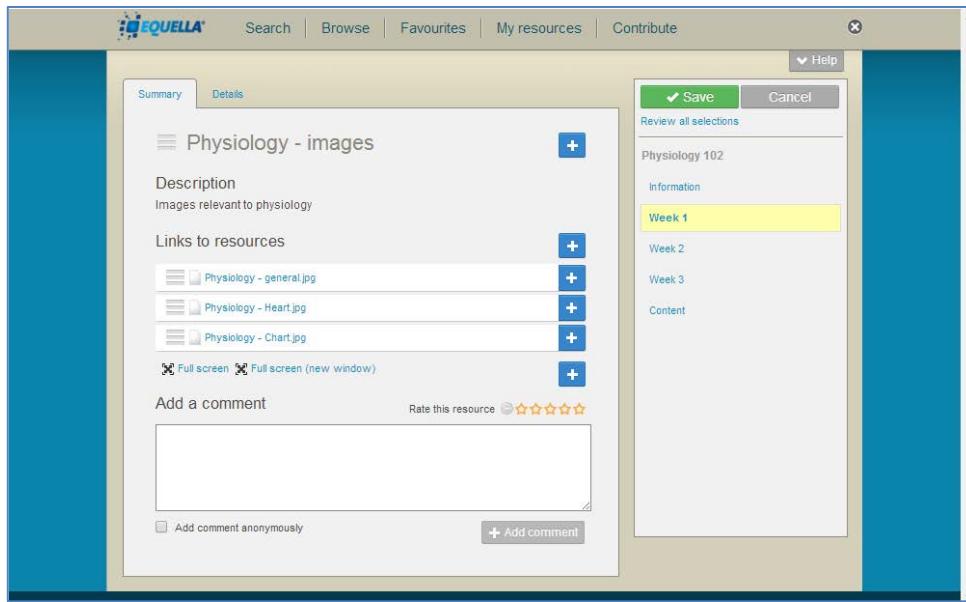
While the mouse is hovering over a specific video, a menu displays at the bottom of the thumbnail, containing the following icons:

- ★ - Click to open the **Add to favourites** dialog and add the resource to your Favourites (see [Adding or removing favourite resources](#) on page 17 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 28 for further information).
- 评论 - 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 51.



**Figure 51 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 39 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 42 for further details).

## Summary tab

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

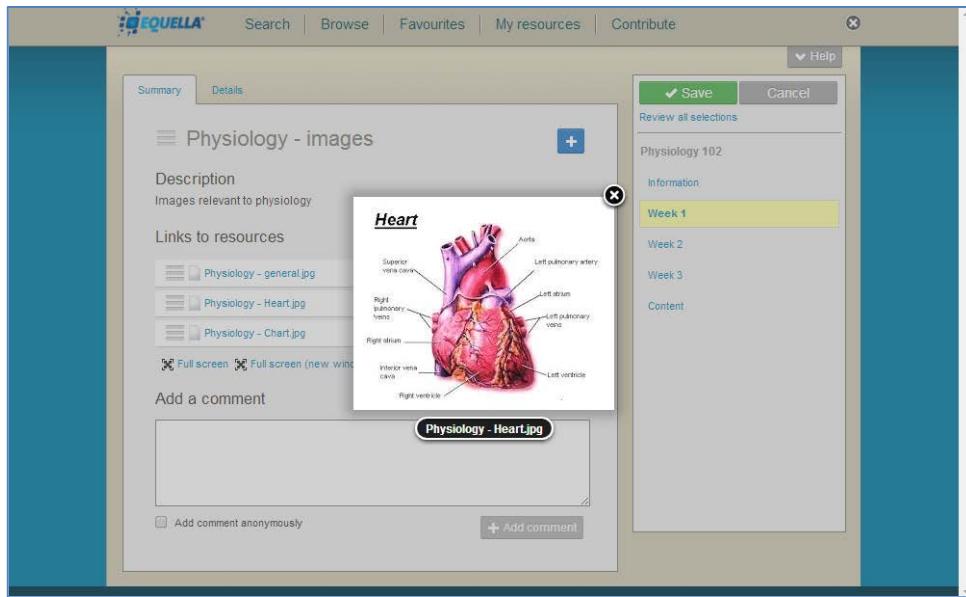
- **Title**
- **Description**
- **Links to resources section** – lists the resource attachments. See [View attachments](#) on page 39 for further information.
- **Full screen/Full screen (new window) links** – opens all of the attachments in a full screen mode.
- **Comments and ratings section** – see [Comments](#) on page 41.

## View attachments

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

### To display an attachment

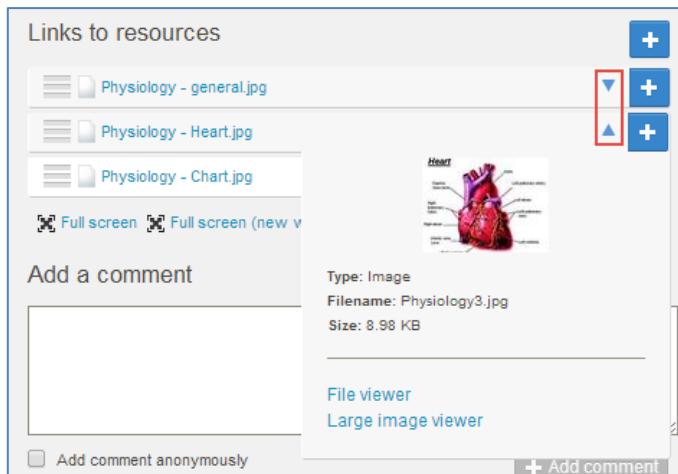
1. Select an attachment link to display the attachment in the default viewer. An example is shown in Figure 52.



**Figure 52 Attachment displayed in default viewer**

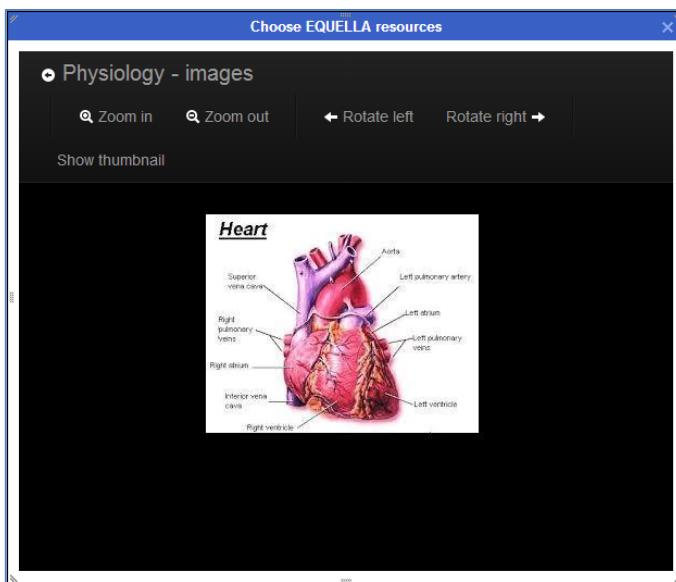
### To display attachment details and viewer options

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 53.



**Figure 53 Viewer options**

2. Select a configured viewer (e.g. **Large image viewer**) to display the attachment. An example is shown in Figure 54.

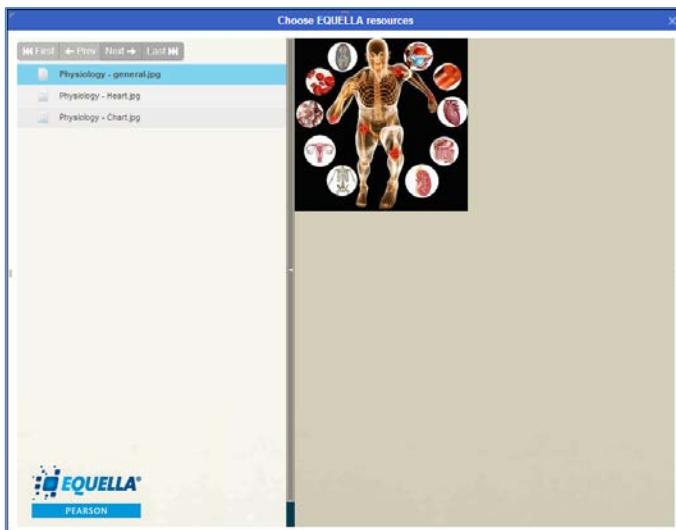


**Figure 54 Attachment displayed in large image viewer**

Further information is provided in the [Large image viewer](#) section on page 46.

### 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 55.



**Figure 55 File viewer with packaged content**

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

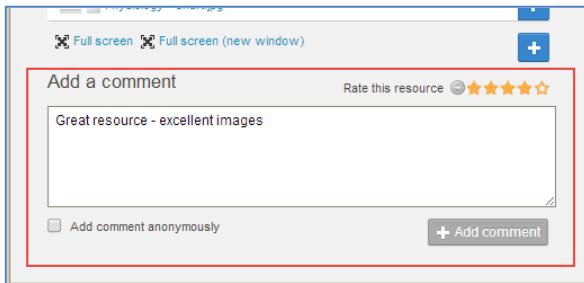
### Comments

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

The **Add a comment** section allows users with the appropriate privileges to enter comments and rate the resource. Clicking 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 56.

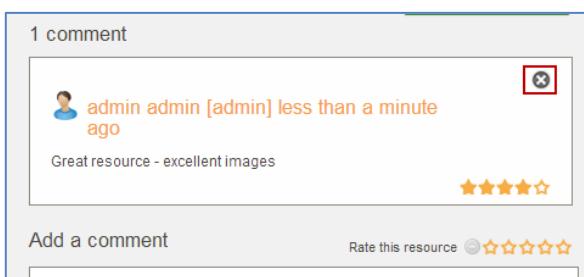


**Figure 56 Add a comment section**

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 57.



**Figure 57 Delete comment**

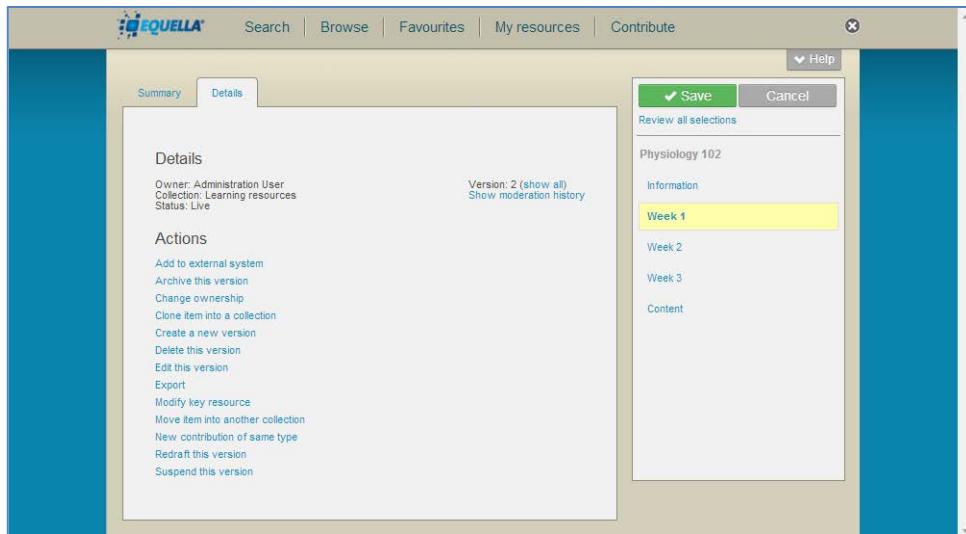
2. Click **OK** in the confirmation dialog.

### 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 58.



**Figure 58 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.
- **Collection**—the collection to which the resource belongs.
- **Status**—resource statuses can be Live, Archived, Deleted, Suspended, Review, Moderating, Rejected or Draft.

*NOTE: Only Live resources can be added to Blackboard 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 43.
- **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 44.
- **Show moderation history**— select this link to display the **Moderation history** page. Refer to the [Moderation history page](#) section on page 45 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 59.



**Figure 59 Version (show all) link**

The **Versions of this item** page displays, listing all resource versions and their statuses. An example is shown in Figure 60.

Versions of this item		
Version	Title	Status
2	Physiology - images	live
1	Physiology - images	archived

**Figure 60 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 60 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 61.

The screenshot shows the EQUELLA interface with the 'Details' tab selected. The main content area displays the 'Terms of use' section, which includes a 'Licence agreement' and a list of terms. Below this, it shows '4 users have accepted this licence' with a table listing the user, date, and time of acceptance. On the right side, there is a sidebar with a 'Review all selections' button, a 'Save' button, and a 'Cancel' button. The sidebar also lists 'Information', 'Week 1' (which is highlighted in yellow), 'Week 2', 'Week 3', and 'Content'. The title bar at the top has links for 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'.

Figure 61 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 62.

The screenshot shows the EQUELLA interface with the 'Details' tab selected. The main content area displays the 'Moderation history' section, which includes a table showing events, users, and dates. Below the table, there are three radio buttons for filtering: 'Basic details' (selected), 'Include edits', and 'Include all moderation details'. On the right side, there is a sidebar with a 'Review all selections' button, a 'Save' button, and a 'Cancel' button. The sidebar also lists 'Information', 'Week 1' (highlighted in yellow), 'Week 2', 'Week 3', and 'Content'. The title bar at the top has links for 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'.

Figure 62 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.

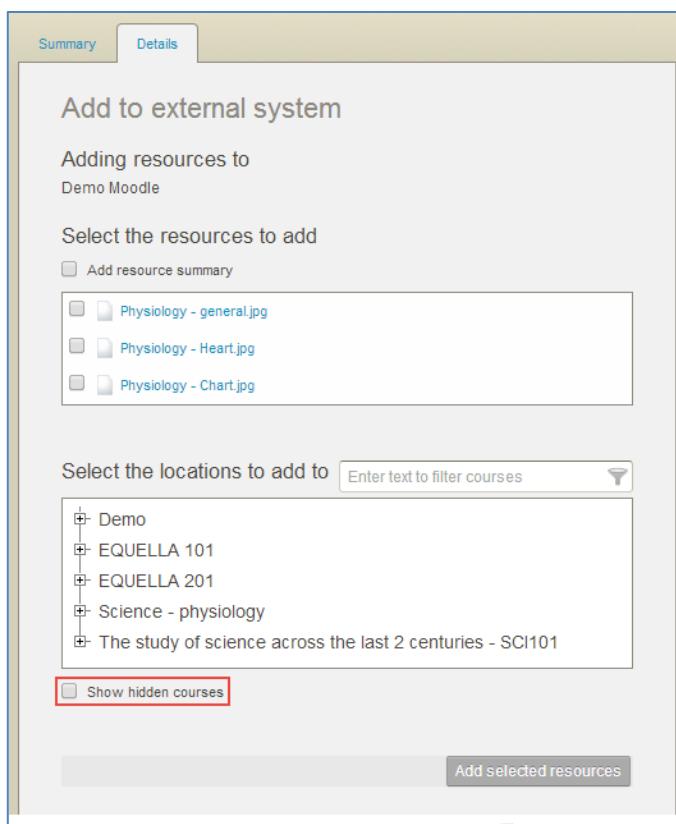
Selecting this action allows the user to add all or parts of the resource to external connectors that have been configured in the system. (*Note: The **Add to external system** link only displays if at least one external connector has been configured in the EQUELLA system.*) See the *EQUELLA Push to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

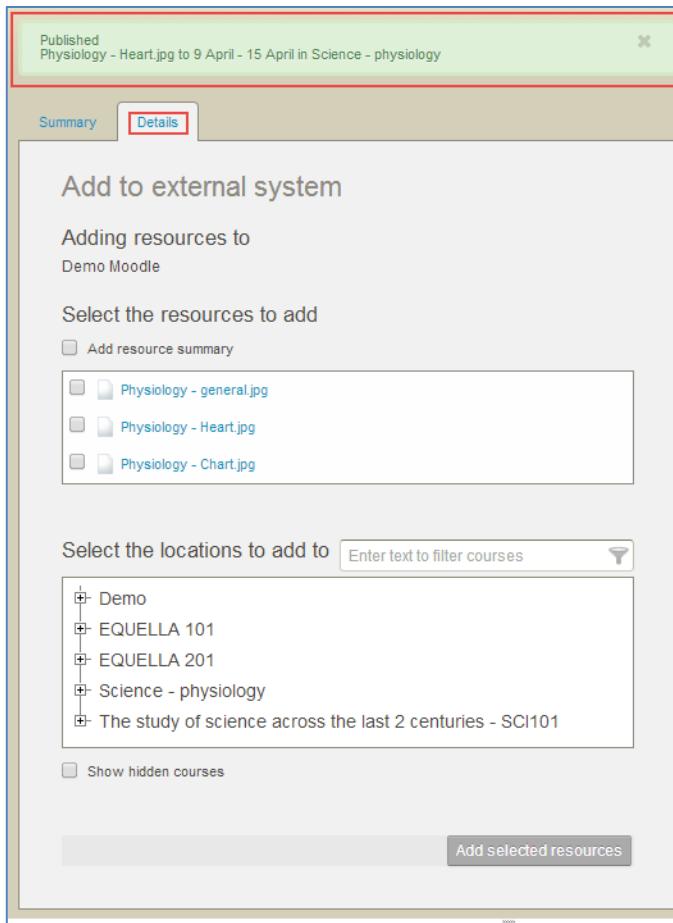
#### To add a resource to an external system

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 where a Moodle connector is set up is shown in Figure 63.



**Figure 63 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 64.



**Figure 64 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 65.

The screenshot shows a web interface for managing owners and collaborators. At the top, there are 'Summary' and 'Details' tabs, with 'Details' selected. Below this, the section 'Owner and collaborators' is displayed. Under 'Owner', there is a box labeled 'Owner' containing 'Administration User' with a 'Change' link. Under 'Collaborators', there is a box labeled 'Collaborators' with a dropdown arrow, stating 'There are currently no collaborators'. A blue 'Add collaborators' button is located at the bottom left of this section.

**Figure 65 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 66.

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 green 'Clone' button with a white checkmark icon.

**Figure 66 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

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

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

3. Select the **Select a schema transform (optional)** drop-down to display the options.
4. Select an option, or leave at the default (**None selected**).
5. Click  **Clone**. The contribution wizard for the resource is displayed.
6. Modify the item metadata or attachments, if required.
7. 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 28 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 67.

The screenshot shows a 'Move this item' interface. At the top, it says 'Move this item'. Below that is a section titled 'Select a collection' with a dropdown menu showing 'Learning resources'. Another section below it is titled '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 67** 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

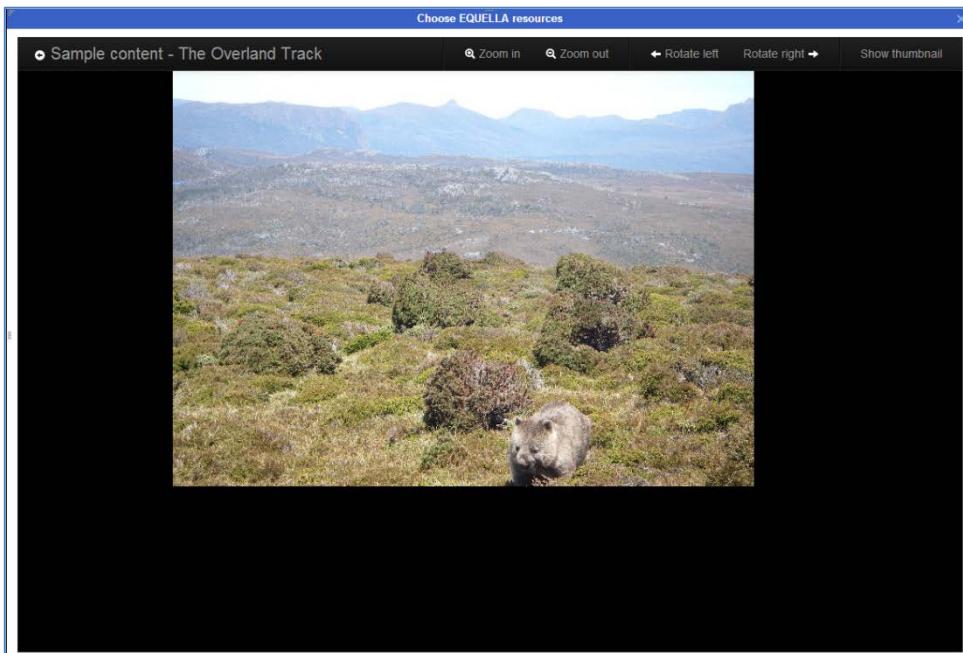
discovered but remains accessible via its URL. A **Resume this version** action is available for suspended resources.

## Large image viewer

An example of the large image viewer is shown in Figure 68.

Large image functionality includes:

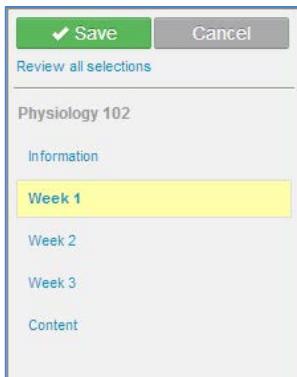
- Zoom in, Zoom out, Rotate left and Rotate right
- **Show thumbnail**—brings up a thumbnail to the top left corner of the image, displaying a smaller version of the image to illustrate the currently viewable portion of the image.
- **Resource name**—the item name is a clickable link to return the user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



**Figure 68 Large image viewer**

## LMS panel

The LMS panel displays the details of the integrated LMS course (in this case, Blackboard) and course locations. An example is shown in Figure 69.



**Figure 69 LMS (Blackboard) 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 Blackboard course locations.
- **Cancel** - use this button to close the integration screen without saving selections.
- **Review all selections** link – see [To view and edit all selections in a selection session on page 61](#).

The bottom section displays the Blackboard 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 53.

## 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 70.

This screenshot shows the EQUELLA search interface. At the top, there's a navigation bar with links for Search, Browse, Favourites, My resources, and Contribute. Below the search bar, there's a search form with a placeholder 'Enter search terms...' and a 'Cloud search' button. The main area displays search results for 'The fascinating origin of dogs'. The first result is a folder titled 'The fascinating origin of dogs' containing articles, images, and links. To its right is a thumbnail image of several dogs. Below the result is a row of buttons: 'Select summary page' (highlighted in red), '0 comments', 'Add to hierarchy', and 'Add to favourites'. Further down the page, there are two more items: 'EQUELLA 6.4 Discoverability Guide.pdf' and 'Physiology 101', each with similar details and interaction buttons. On the right side of the screen, there's a sidebar for 'Physiology 102' which includes sections for 'Information', 'Week 1' (which is highlighted in yellow), 'Week 2', and 'Content'.

**Figure 70 Select summary page button on result page**

An example on the Resource summary page is shown in Figure 71.

This screenshot shows the EQUELLA Resource summary page for the item 'The fascinating origin of dogs'. The page has tabs for 'Summary' (which is selected) and 'Details'. The main content area contains a brief description of the resource, a section for 'Links to resources' with a list of items including a PDF file, an image, and a web link, each with a '+ Add' button; there are also 'Full screen' and 'New window' options. Below this is a 'Add a comment' section with a text input field, a rating scale from 1 to 5 stars, and a checkbox for 'Add comment anonymously'. At the bottom right of this section is a '+ Add comment' button. To the right of the main content is a sidebar for 'Physiology 102' with sections for 'Information', 'Week 1' (highlighted in yellow), 'Week 2', and 'Content'. The 'Select summary page' button from Figure 70 is visible at the top right of the main content area.

**Figure 71 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 Blackboard course location.

## Select all attachments

The **Select all attachments** button displays on the summary page. An example is shown in Figure 72.

The screenshot shows the EQUELLA interface. On the left, there's a summary card for a resource titled "The fascinating origin of dogs". The card includes a description, links to resources, and a comment section. A red box highlights the "+ Select all attachments" button located next to the links. On the right, a sidebar shows a list of course locations: "Week 1" is highlighted in yellow, while "Week 2" and "Content" are in blue. At the top right, there's a green "Save" button and a "Review all selections" link.

**Figure 72 Resource summary page - Select all attachments button**

When this button is selected, a single link for each attachment is added to the highlighted Blackboard course location. An example is shown in Figure 73.

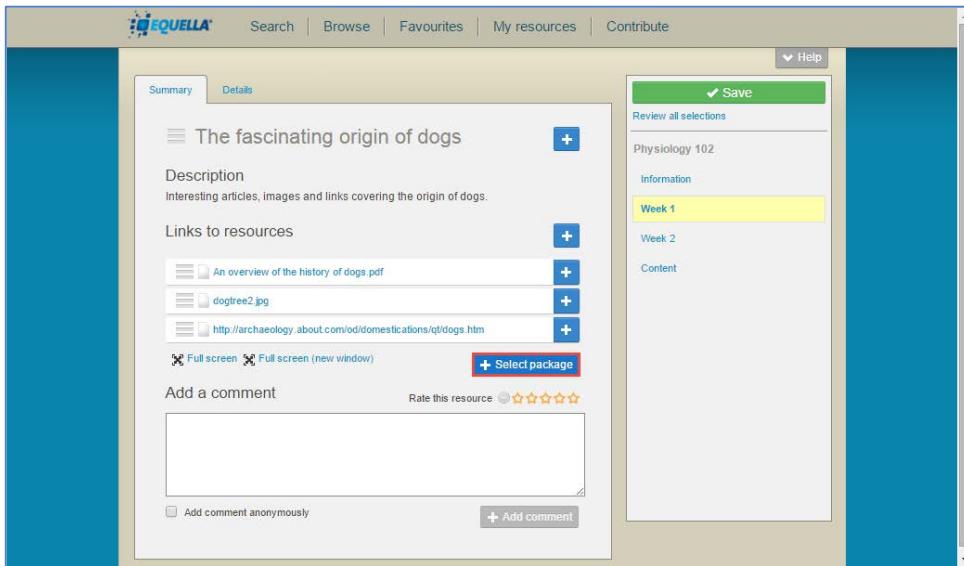
The screenshot shows a Blackboard course page for "Week 1". The left sidebar has a navigation menu with "Physiology 102" expanded, showing "Home Page", "Information", "Week 1", "Week 2", "Content", "Discussions", "Groups", "Tools", and "Help". Below that is a "COURSE MANAGEMENT" section with "Control Panel", "Content Collection", "Course Tools", "Evaluation", "Grade Center", "Users and Groups", and "Customization". The main content area displays three instances of the "The fascinating origin of dogs" resource. Each instance shows a thumbnail, a title, a link, and a brief description. The links are separate from each other, indicating they were selected using the "Select all attachments" feature from the EQUELLA summary page.

**Figure 73 Blackboard 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 74.



**Figure 74 Resource summary page - Select package button**

When this button is selected, a single link for all the attachments is added to the highlighted Blackboard course location. An example is shown in Figure 75.

A screenshot of the Blackboard interface. The left sidebar shows a navigation tree for "Physiology 102" with "Week 1" selected. The main content area is titled "Week 1" and contains a resource card for "The fascinating origin of dogs", which includes a link to the resource and a brief description. The top navigation bar includes "Courses" (which is currently selected), "Community", "Services", and "System Admin".

**Figure 75 Blackboard 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 76.

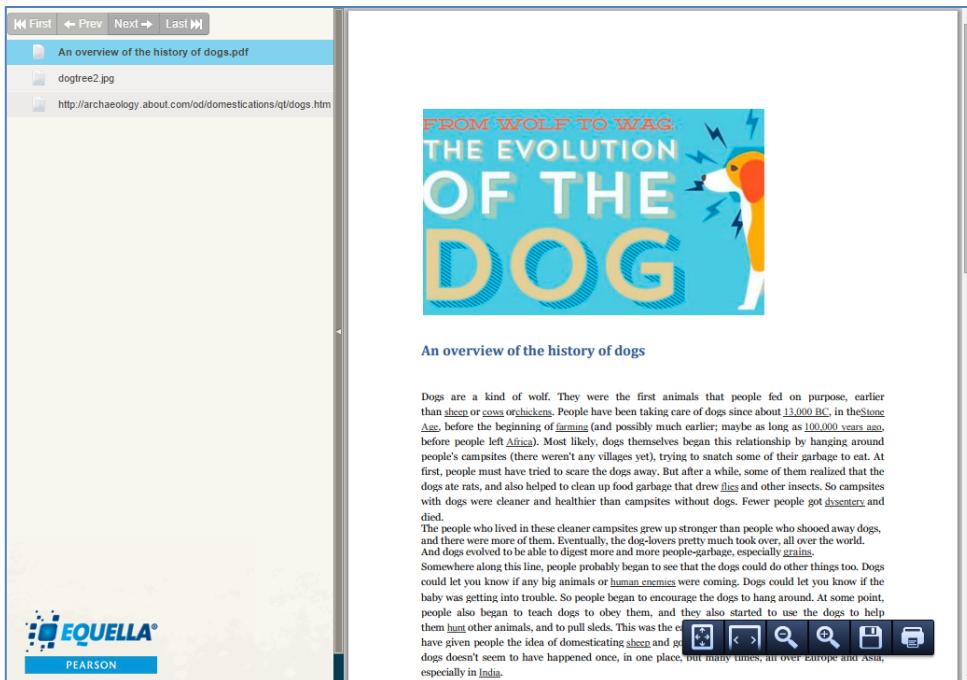


Figure 76 Package player where each attachment can be viewed

## Selecting items

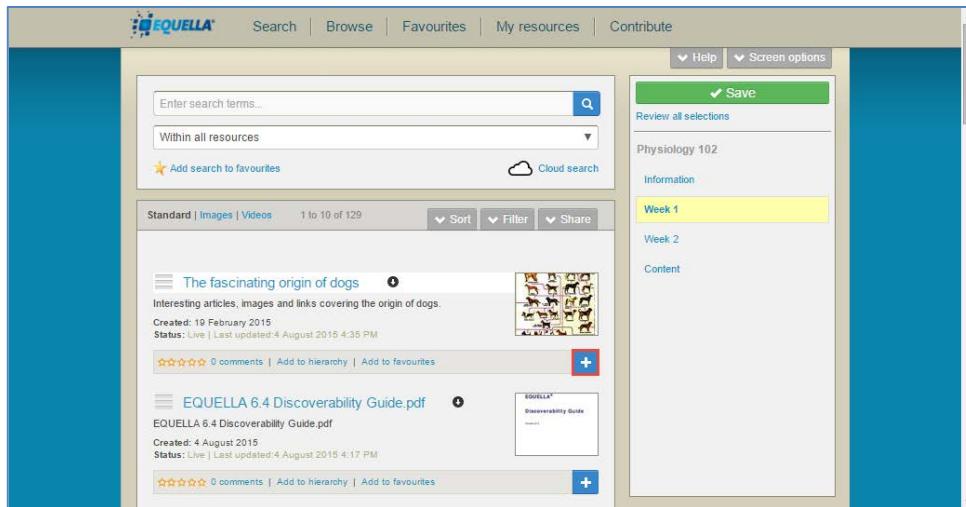
### Selection using buttons

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.

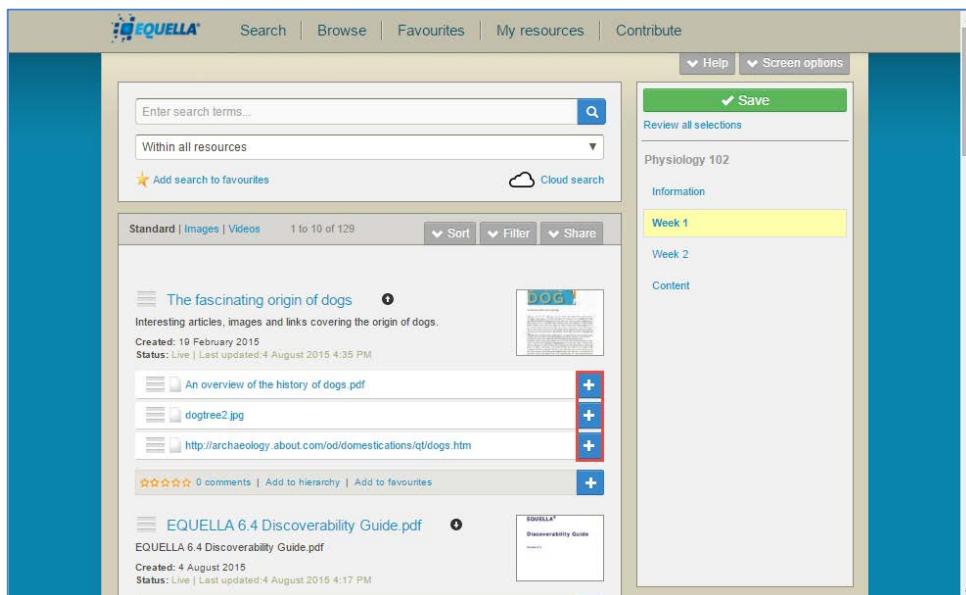
*NOTE: The course location where the **Add an activity or resource** link was selected is highlighted and bolded in the LMS panel. If an alternative location is manually highlighted, the original remains bolded. Items are only added to the highlighted course location.*

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 54 for further information). An example from the results page is shown in Figure 77.



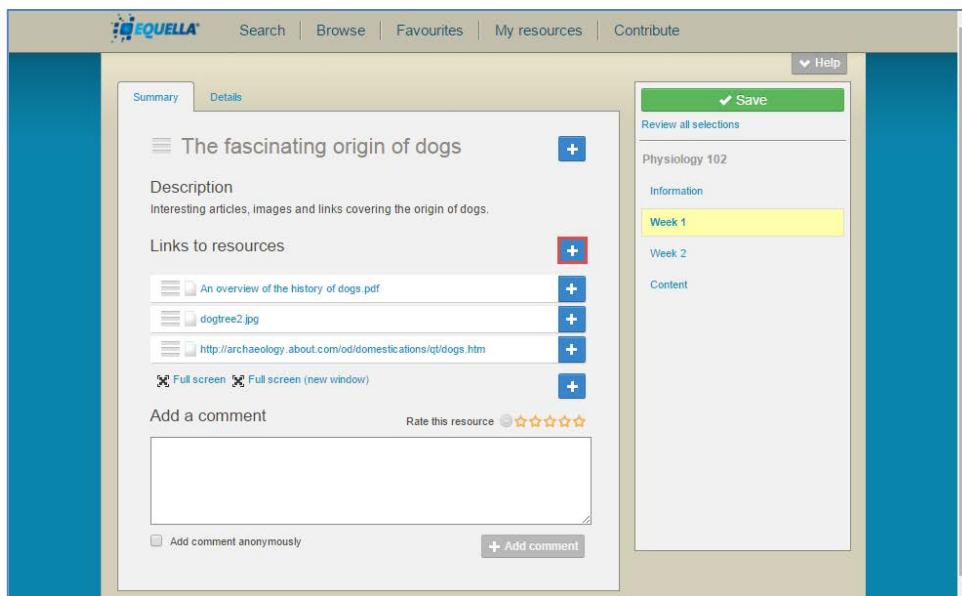
**Figure 77 Selecting summary page from search results page**

- **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 78.



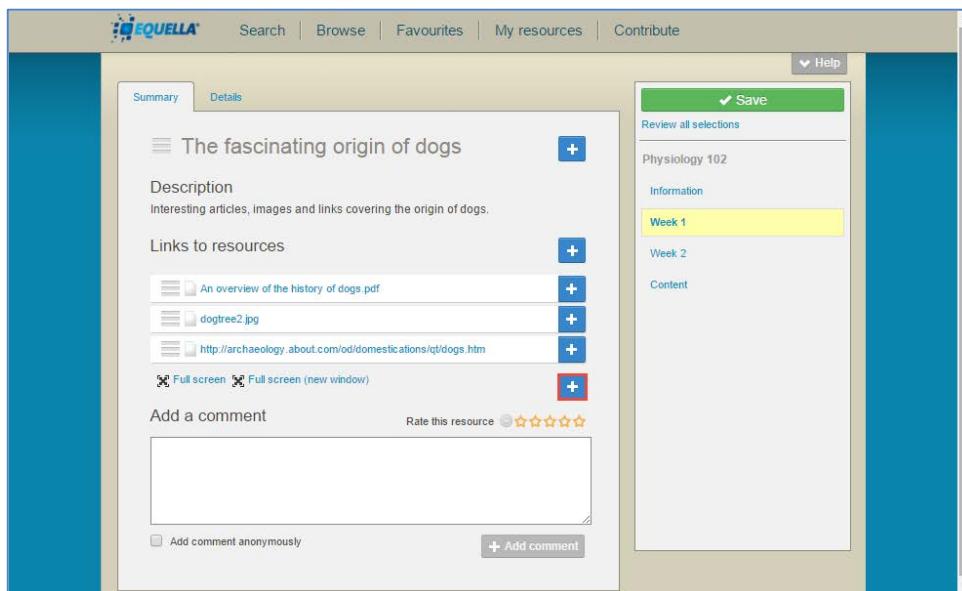
**Figure 78 Selecting attachments from search results page**

- 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 55 for further information). An example is shown in Figure 79.



**Figure 79 Selecting 'All attachments' button from the summary page**

- All attachments (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 56 for further information). An example is shown in Figure 80.



**Figure 80 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.

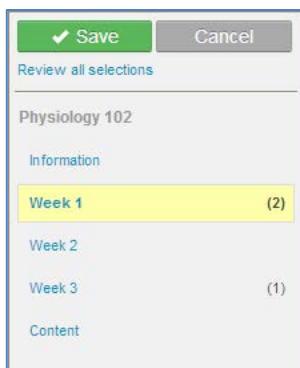
## To select resources or attachments using drag and drop

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

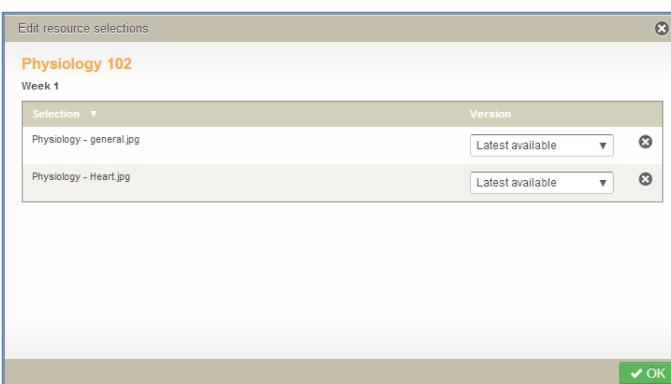
As items are selected, an animation displays on the screen, showing the selected item being added to the highlighted course. A number count displays beside the course location as items are selected. An example is shown in Figure 81.



**Figure 81 Item count**

## To view and edit the items selected for one course location

1. Click the required course location list (e.g. Week 1). The **Edit resource selections** dialog displays. An example is shown in Figure 82.

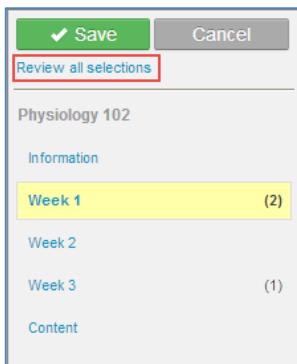


**Figure 82 Edit resource selections**

- 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.

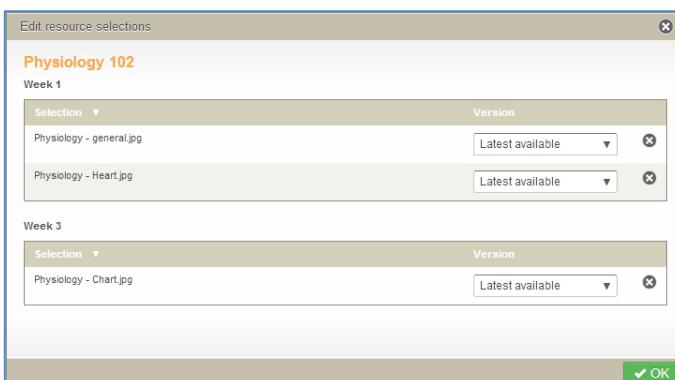
## To view and edit all selections in a selection session

1. Click the **Review all selections** link at the top of the LMS panel. An example is shown in Figure 83.



**Figure 83 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 84.



**Figure 84 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

1. 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 85.

Figure 85 Blackboard course page with new links

## Managing resources in Blackboard

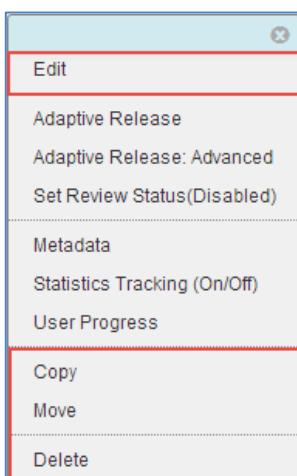
Once a resource is added to a Blackboard course, Blackboard functionality allows for a number of actions to be performed on the resource. Some basic functions are described below.

With the **Edit Mode** set to **On**, clicking the button alongside a resource reveals a menu of actions which can be used to manage resources. An example is shown in Figure 86.

Figure 86 Resource actions menu

The menu actions with specific relevance to EQUELLA resources, include the following (also highlighted in Figure 87):

- **Edit**—edit the resource name and description, as well as certain display properties.
- **Copy**—copy the resource to a different course and/or into a different course location (e.g. Week 2). The source resource remains in place after this operation.
- **Move**—moves the resource to a different course and/or into a different course location (e.g. Week 2). The source resource does not remain in the original location after this operation.
- **Delete**—removes the resource from the course location.



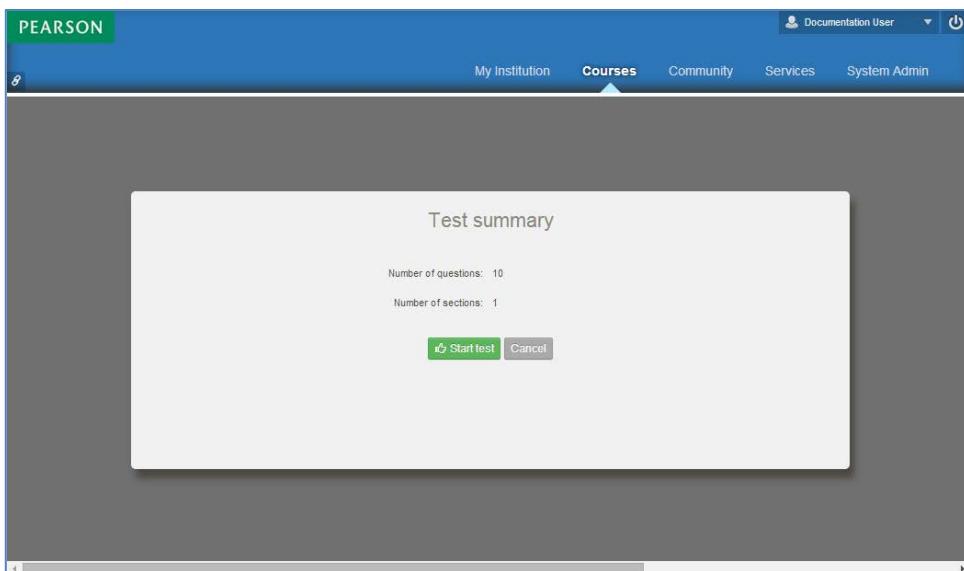
**Figure 87 EQUELLA-relevant resource actions**

## 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 88.



**Figure 88 QTI Quiz launch page**

2. Click **Start test**. The first question displays. An example is shown in Figure 89.

A screenshot of the Pearson QTI Quiz example page for a 'Science' course. The top navigation bar is identical to Figure 88. The main content area shows 'QTI Quiz Example - Science' and a 'Return to Physiology 102' link. On the left, a sidebar lists 'Section 1' with numbered questions from 1 to 10. 'Question 1' is highlighted with a blue bar. On the right, the details for 'Question 1' are displayed: the question text is 'Which of these is least important for a successful career in science and technology?' followed by four radio button options: 'A creative imagination', 'A solid knowledge base', 'The ability to work with others', and 'Personal wealth'. Navigation arrows at the top of the right pane allow for 'Prev' and 'Next' steps.

**Figure 89 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 90.

The screenshot shows a quiz interface with a sidebar on the left containing a list of questions from Question 1 to Question 10, with Question 4 currently selected. The main content area displays Question 4, which asks: "Which of these is the major source of energy for the convection currents in the Earth's mantle?" Below the question is a list of four options with radio buttons:

- The sun
- Volcanoes
- Atmospheric pressure
- Radioactive decay

**Figure 90 Question status bars**

- Questions can be answered in any order.
- Clicking on the **Return to <Course name>** link (e.g. *Return to Physiology 102*) 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.*

3. 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 Blackboard.

*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 91.

The screenshot shows a quiz results page titled 'QTI Example package'. On the left, under 'Section 1', there are several questions listed: 'Operating systems', 'Question about EQUELLA' (which is highlighted in blue), 'Fabuland', 'True/false question about geometry', and 'What sort of triangle'. Under 'Section 2', the questions are: 'Identify the picture', 'Jules Verne', 'Survey', 'Pick the false statement', and 'The answer to...'. A 'View result' button is located at the top left of the left panel. On the right, the 'Results' section displays the following summary: '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)', and 'Total score: 59.0 (from a maximum of 100.0)'.

**Figure 91 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 92.

The screenshot shows the same quiz interface as Figure 91. In the left panel, the 'Question about EQUELLA' link is highlighted in blue. The right panel displays the detailed feedback for this question, titled 'Question about EQUELLA'. It includes navigation arrows for 'Prev' and 'Next'. The question text is 'EQUELLA is made in:'. Below it is a list of three options with radio buttons: 'Zimbabwe' (unchecked), 'Australia That's right, it's dinky-di true blue mate.' (checked), and 'Antarctica' (unchecked). There are also 'Prev' and 'Next' navigation buttons at the top right of the right panel.

**Figure 92 Question level feedback**

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

## Edit resource details

To edit the details of an EQUELLA resource

1. Select the **Edit** link from the action menu to display the **Modify Resource Content Object** page. An example is shown in Figure 93.

The screenshot shows the 'Modify Resource Content Object' dialog box. In the top right corner, it says 'Edit Mode is: ON'. The main area is divided into two sections: 'CONTENT INFORMATION' and 'OPTIONS'. Under 'CONTENT INFORMATION', there is a 'Name' field containing 'Physiology - Images', a 'Description' field (empty), and an 'Attachments' section showing a file named 'Physiology - general.jpg'. Under 'OPTIONS', there are several configuration options: 'Do you want to make the content visible?' (radio buttons for Yes and No, 'Yes' is selected), 'Do you want to track number of views?' (radio buttons for Yes and No, 'No' is selected), 'Do you want to add Metadata?' (radio buttons for Yes and No, 'No' is selected), 'Select Date(s) of Availability': 'Display After' (text input field with placeholder 'Enter dates as mm/dd/yyyy') and 'Display Until' (text input field with placeholder 'Enter dates as mm/dd/yyyy'), both with calendar icons. At the bottom of the dialog, a note says 'Click Submit to proceed. Click Cancel to go back.' and contains 'Cancel' and 'Submit' buttons.

**Figure 93 Modify Resource Content Object page**

This page includes the following options for editing EQUELLA resources in the **Content Information** pane:

- **Name**—edit the name of the resource. (*NOTE: Blank entries in this field will revert to the previously saved value.*)
- **Description**—a brief description of the resource can be entered or edited.
- **Attachments**—select this link to access the resource summary page.

Other editing options exist in the **Options** pane including: hiding the content, tracking the number of views, adding metadata and configuring the availability timeframe.

2. Click **Submit** to save your changes and return to the course content page.

## To view a resource

1. Select the resource title link to display the resource with its default viewer. An example is shown in Figure 94.

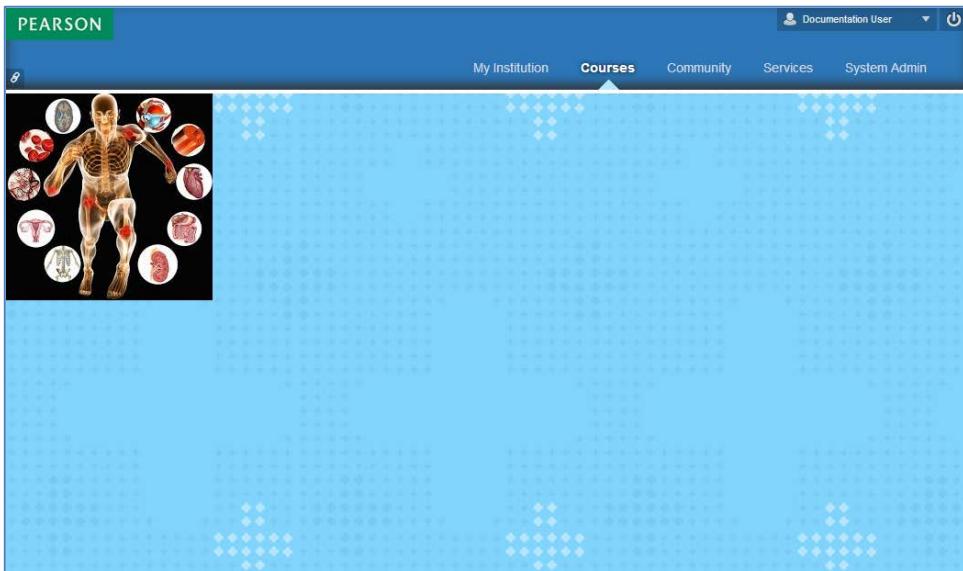


Figure 94 Resource view

## 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>.