EQUELLA®

Searching User Guide

Version 6.4

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Searching overview

The EQUELLA Digital Repository allows users to search, create, store, manage, view and share content. Content can include published content (*resources*) and personal content (*files and web pages*)*.* A variety of searching methods are available for finding content in the repository, ranging from a basic keyword search to complex custom searches targeting specific resource information (metadata), to browsing specific categories.

In addition to searching, EQUELLA provides a variety of options for sorting and filtering the search results to drill down to the specific needs of the user.

The purpose of this guide is to give users an overview of the available search options and how they can be most effectively used.

Please note that this guide has been developed to reflect the full capabilities of EQUELLA and as such may differ in appearance from your own installation. Contact the system administrator for access to extra features or to reconfigure your installation.

EQUELLA Dashboard

To access EQUELLA

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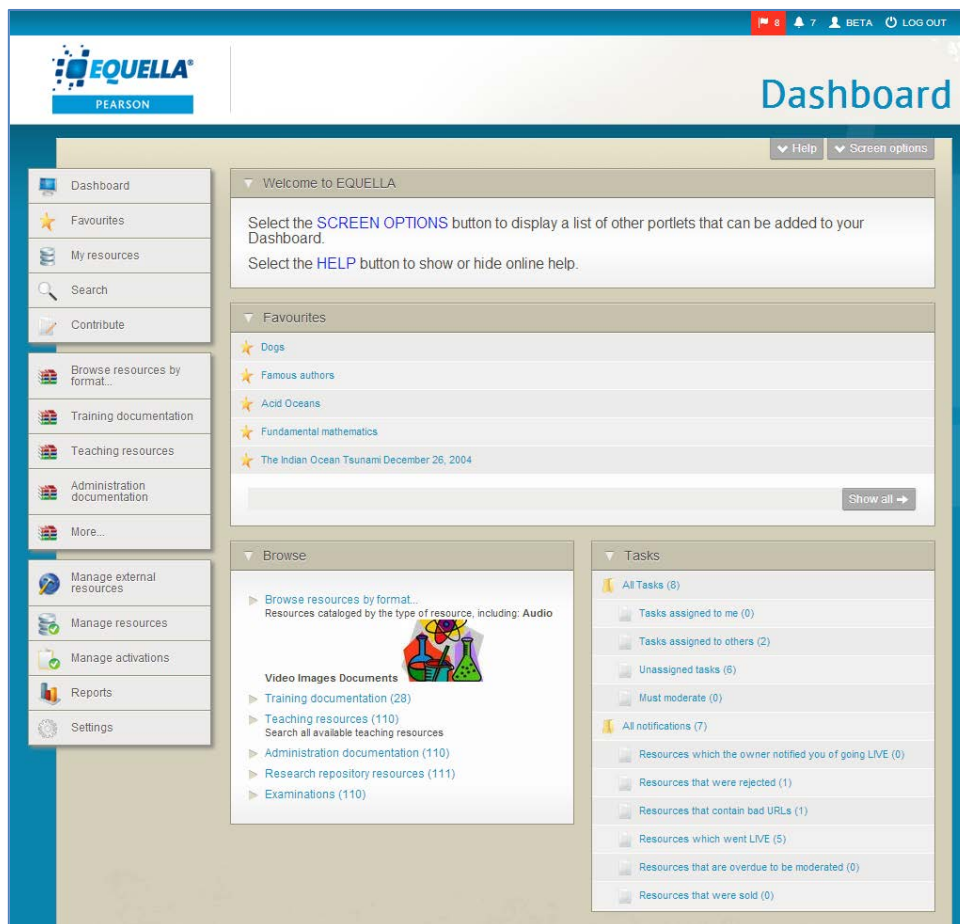
Figure 1 EQUELLA Home page

The EQUELLA Digital Repository allows users to search for and discover content in a number of ways.

Search types

There are a variety of search types available for discovering EQUELLA content, including:

- **Basic search**—search by keyword, used when the resource name or keywords are known. See Search page on page 15 for more information.

- **Search by collection**—search within a specific collection. See Search by collection on page 18 for more information.

- **Advanced search**—target specific resource information (metadata) using customised search criteria. See Advanced search on page 18 for more information.

- **Search other repositories**—search for records from a variety of external sources such as library databases and search engines. See Search Remote repositories on page 33 for more information.

- **Cloud search** – searches OER content stored in the cloud.

- **Favourites**—search within a group of resources or searches that have been bookmarked as favourites. See Favourites on page 42 for more information.

- **Google Books™ search**—search for Google Books content to add to contributed resources. See Google Books search on page 61 for more information.

- **iTunes U™ search**—add tracks from iTunes U to resources during contribution. See iTunes U search on page 62 for more information.

- **YouTube™ search**—search for YouTube content to add to contributed resources. See YouTube search on page 63 for more information.

- **Flickr search**—search for Flickr images to add to contributed resources. See Flickr search on page 65 for more information.

- **Kaltura**—search for Kaltura streaming media files to add to contributed resources. See Kaltura search on page 68 for more information.

- **Browse**—browse hierarchy categories to 'drill down' to required resources. See Browsing on page 69 for more information.

Search edit box

The **search edit box** is found on most search pages in the EQUELLA system, and allows the user to enter keyword data to search for matching resources. An example of the Quick search edit box is shown in Figure 2.
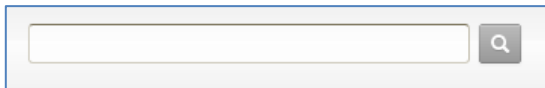
Figure 2 Search edit box

Once keywords are entered, the system can search resource titles, descriptions, attachment names and content and other metadata for matching results, depending on how the search options are configured.

Keywords

In EQUELLA, keywords can be entered to search for matching resources. A single keyword can be entered, or a number of keywords. The keywords must be an exact match within the resource name, description or stored keywords (e.g. *equella*), otherwise no matching results will be found.

For example, entering the keyword *'equella'* will return any resources that have the word 'equella' in their title, description, attachment name or attachment content (for most attachment types). An example is shown in Figure 3.

Figure 3 Single keyword search results

(*NOTE: Each keyword match is highlighted in yellow.*)

Autocomplete

Autocomplete functionality is available in the search edit box and most keyword searches. Autocomplete means that the user can type two or more letters into the search text box and EQUELLA will suggest resource titles based on the letters entered.

For example, if the user is looking for a resource that has *equella* in its title, as soon as they type in *eq*, up to four suggestions display, based on relevance. An example is shown in Figure 4.
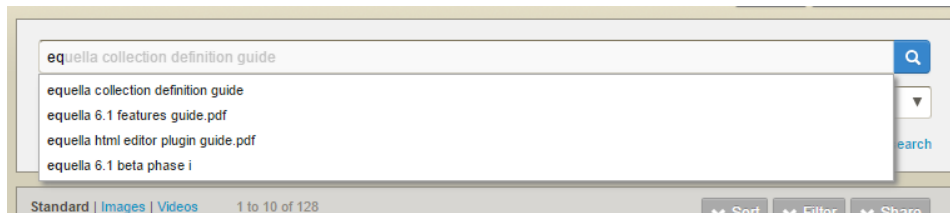
Figure 4 Autocomplete functionality

If the user is searching for *equella 6.2,* typing the *6.2* will change the suggestions. An example is shown in Figure 5
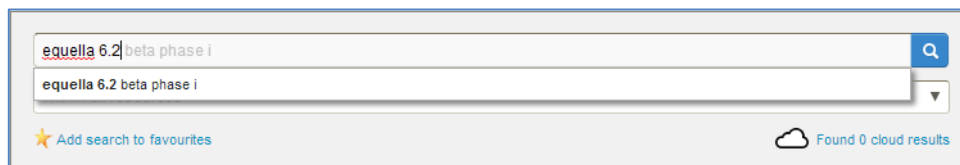
Figure 5 Search for 'equella 6.2'

Note that there is only one matching suggestion for '*equella 6.2',* which means there is only one resource in the EQUELLA repository containing '*equella 6.2*' in its title*.*

Selecting a suggestion

Selecting a suggestion from the drop-down list by clicking on it, or highlighting it using the keyboard arrows, replaces what is currently in the Search text box with the selected value.

The top suggestion always defaults in the search text box in light gray. Click on the required suggestion to select.

Multiple word autocomplete

If the user types in a single word (e.g. *equella*), the suggestions will be resources with the word 'equella' in their titles. But if the user types in '*equella features'*, the suggestions will be resources that have 'equella features' in their titles in that exact order. An example is shown in Figure 6.
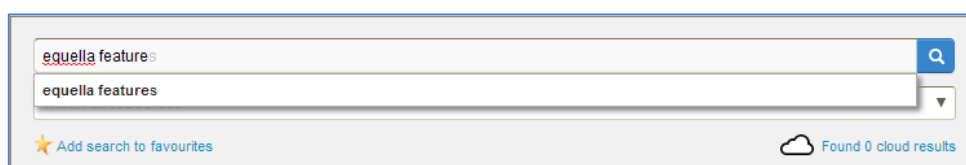
Figure 6 Multiple word autocomplete

If a user wants to find resources using multiple keywords (e.g. *equella + guide*), and there are no resources that contain the words in the exact order, the autocomplete function will suggest single words, based on words used in resource titles in the repository. An example is shown in Figure 7.
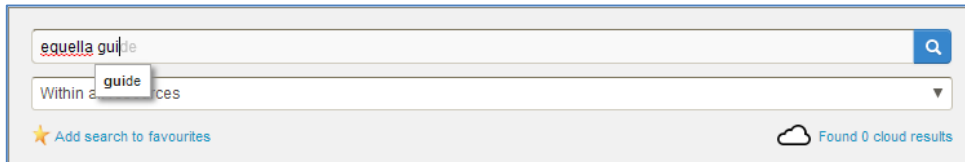
Figure 7 Single word autocomplete

Stemming

EQUELLA also uses 'stemming' in searching. Stemming is where the system recognises the root (stem) of a word, and performs the search using the root term instead. For example, if '*cooks*' was entered as a search criterion, the system performs a search for '*cook*´ (the stem word) and resources containing this stem would be returned, such as '*cooking*' and '*cooked*'.

An example is shown in Figure 8.
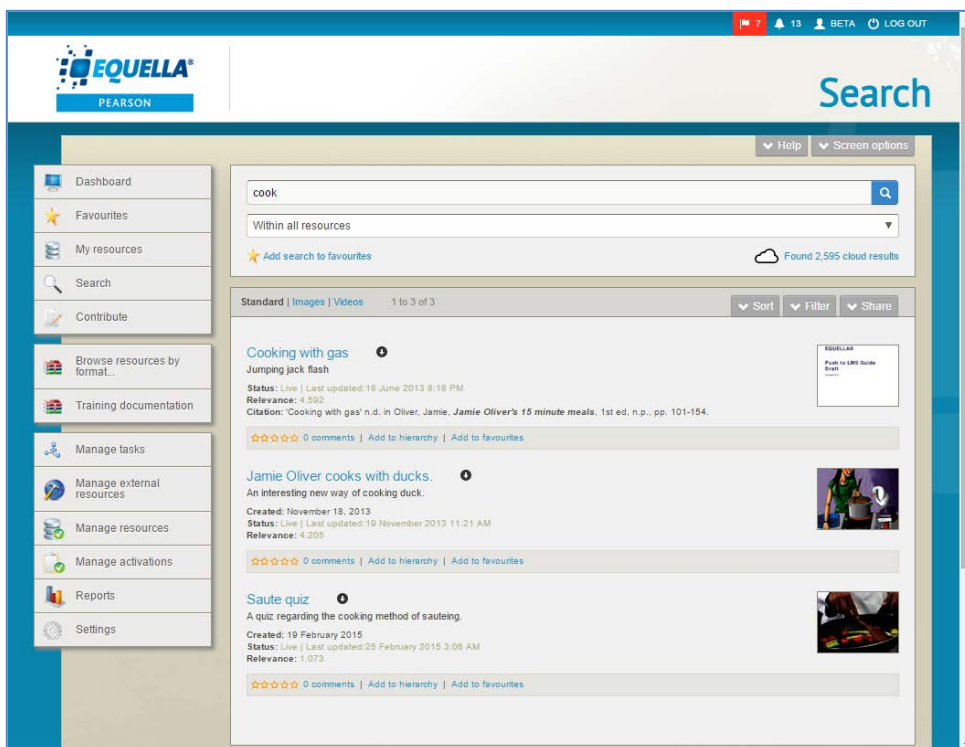
Figure 8 Use of 'stemming' in searching

Multiple keywords

Multiple keywords can be entered in the following ways:

- **Multiple keywords with a space between each word**—entering two or more keywords with a space between each word will return results that have all of the entered keywords. For example, entering *equella features* will display resources that have **both** *equella* **and** *features* in its title, description or attachment name. An example is shown in Figure 9.

Figure 9 Multiple word search results
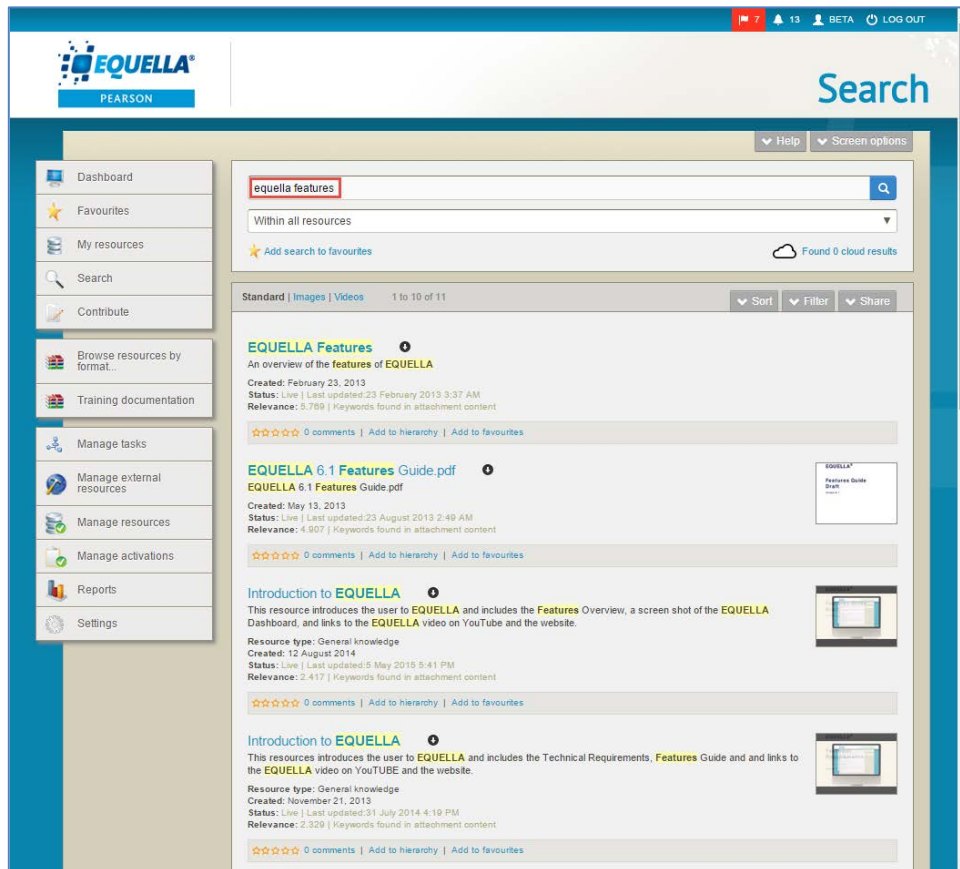
(*NOTE: Each keyword match is highlighted in yellow.*)

- **Multiple keyword with 'or'**—entering two or more keywords with *'or'* between each will return resources that contain either all or one of the keywords. For example, entering '*equella or features'* will display resources that have one or both words contained within its title, description or attachment name, with the ones containing both words at the top.

Use of a wildcard (*)

The definition of a wildcard is a character that can be used to substitute for any other character or characters in a string. This comes in handy if the user is unsure of spelling or wants to find a range of results that start with a certain character or string of characters.

In EQUELLA, a user can enter a character or string of characters with the wildcard (*****) to find any resources that start with that value. For example, the user could enter ***tas**** to return any resources that contain the word *tasmania*. Any other resources containing

words starting with the character string '*tas*' will also be returned (e.g. ***tas**te*, ***tas**sel etc.*).

A wildcard can also be placed in the middle of two characters or character strings. For example, entering ***t*a*** will also return any resources containing the word *tasmania*, as well as any resources containing a word starting with *t* and ending in *a* (e.g. *tarantula, tea etc.*).

(*NOTE: Wildcards cannot be used at the beginning of a search term.*)

Relevance scores and searching attachments

Relevance scores display for each result when a search term or terms have been entered and the sort order is set at *Relevance.* The relevance score is a number calculated using an algorithm based on the boost values set for title, metadata and attachments. The higher the number, the more relevant the result to the search criteria. An example is shown in Figure 10.
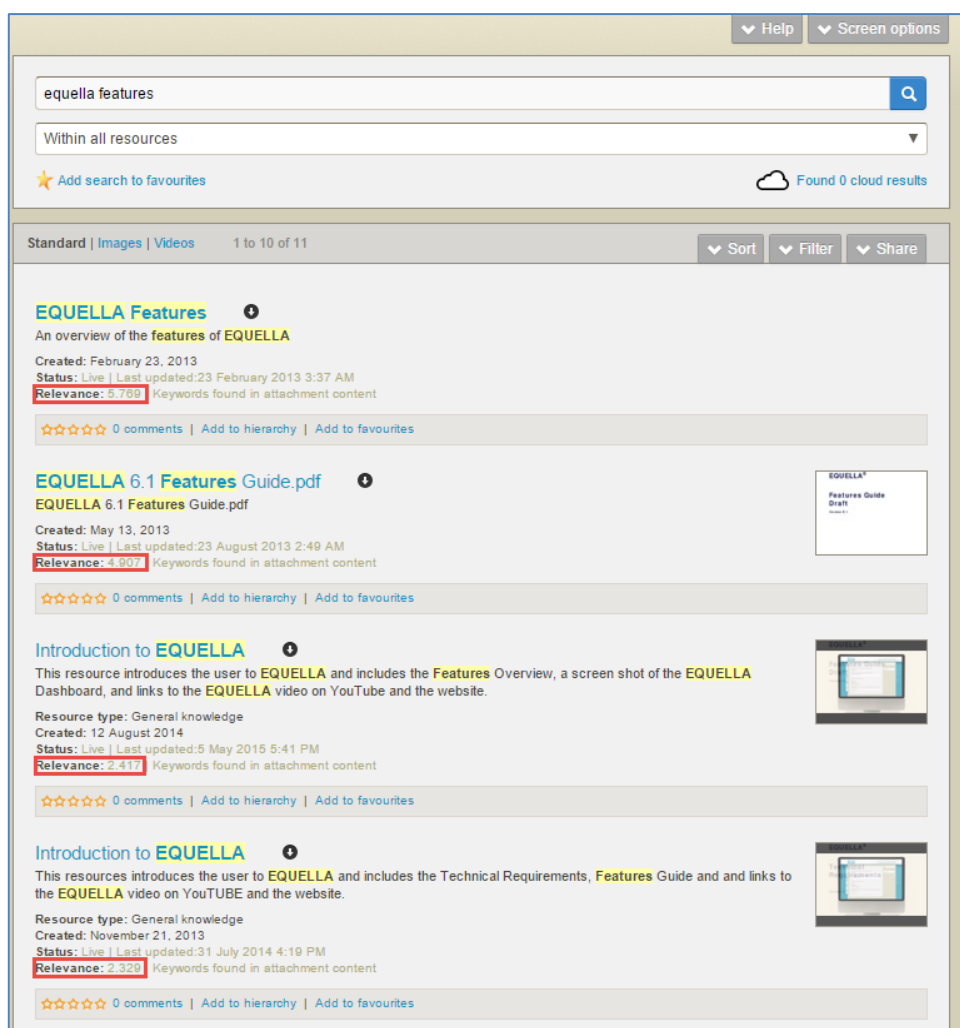
Figure 10 Relevance scores

Additionally, if attachments have a boost value set to something other than *Off* (that is, attachment names and content are searched for matches to the search terms), and matches are found, *Keywords found in attachment content* displays next to the Relevance score. An example is shown in Figure 11.
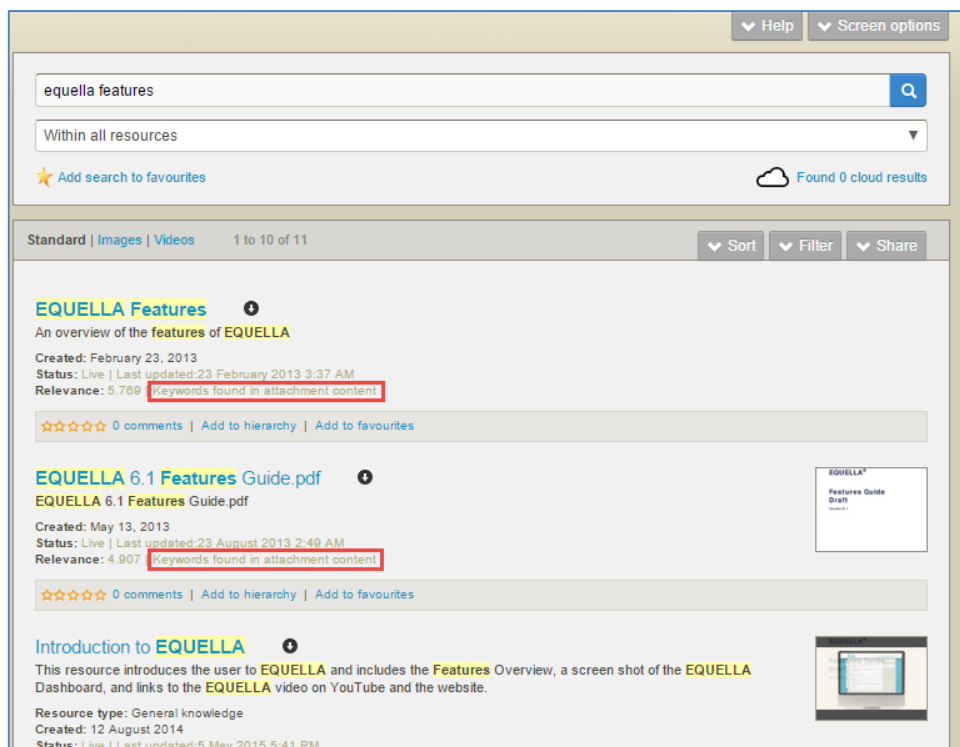
Figure 11 Keywords found in attachment content message

If the boost value for attachments is set at any value besides *Off*, individual users may toggle the attachment search from the Results page **Screen options.** This allows users to choose whether they want their keyword searches to look in attachments, or only in the resource title and metadata. An example is shown in Figure 12.
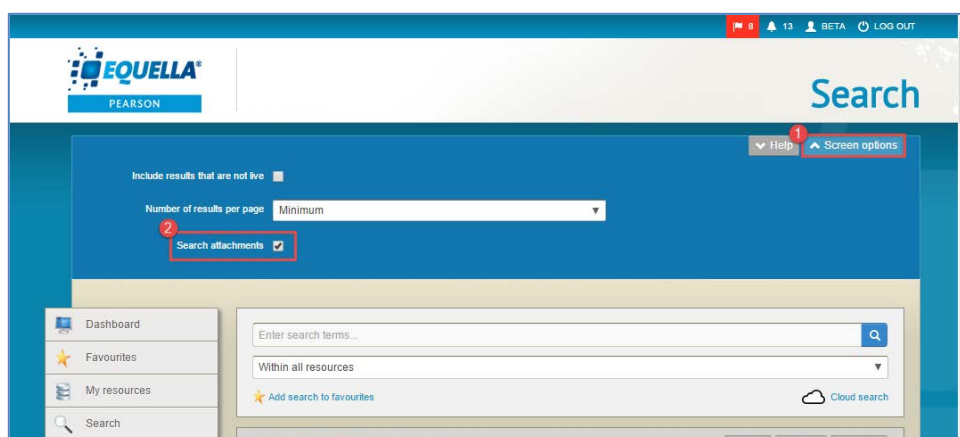
Figure 12 Search attachments toggle option

See Searching terms boost on page 76 for further information.

Quick search

The **Quick search** portlet is found on the EQUELLA Dashboard page, and allows the user to perform simple keyword searches using the search edit box. An example is shown in Figure 13.

Figure 13 Quick search portlet

To perform a search using the Quick search portlet

1. Using one the methods outlined above, enter keywords (e.g. *equella*) in the search field.

2. Click the search ![search button] button or press **Enter** to return matching results. The **Search** page opens with the results displayed. An example is shown in Figure 14.
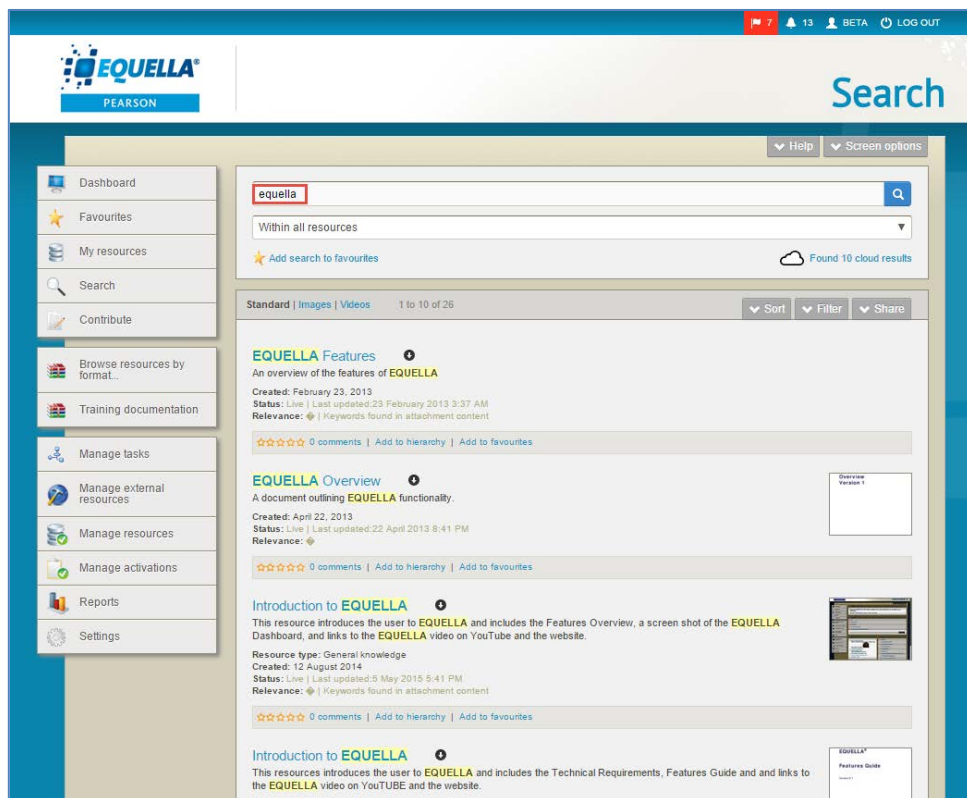
Figure 14 Search page with search results

Search page

The **Search page** enables the user to search resources using simple keyword searches, but also provides the ability to search within particular collections or perform more complex searches such as advanced searches and remote repository searches. The search page is accessed by selecting **Search** from the navigation menu, as shown in Figure 15.
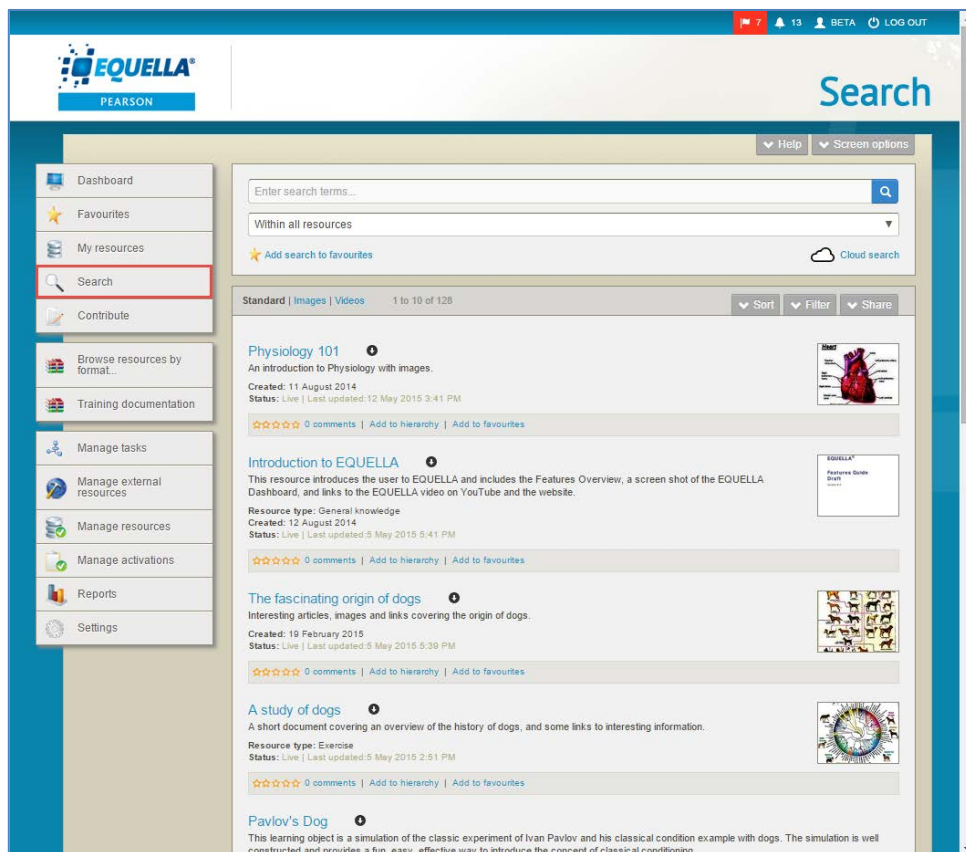
Figure 15 Search page

On first logging into EQUELLA and selecting the search page, the search results default is **Within all resources.** If the user leaves the search page after changing the search criteria, on returning to the search page, the last criteria selected will be the default.

The **Search** page has the **Search box** at the top, where criteria are selected, and the **Results box** displayed below. An example is shown in Figure 16.
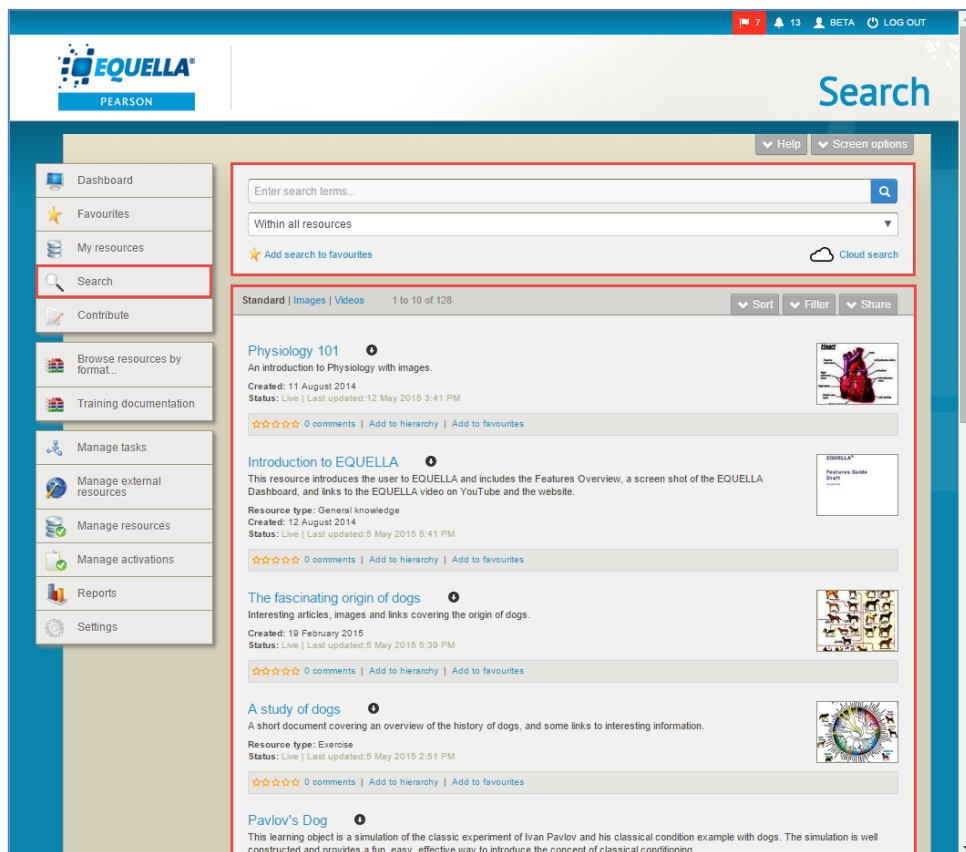
Figure 16 Search page with Search box and Results box

The user can enter keywords in the search text box, and use the **Within** drop-down list to further qualify results. A value can be selected from the **Within** drop-down box without entering keywords in the search text box.

Search options

Searching can be refined by selecting a collection, advanced search, remote repository or all resources from the **Within** search categories in the **Search** box. An example is shown in Figure 17.
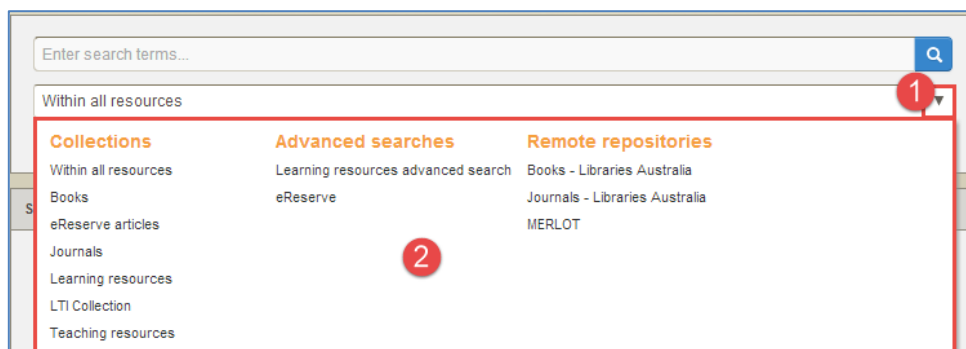
Figure 17 Within search categories

Search by Collection

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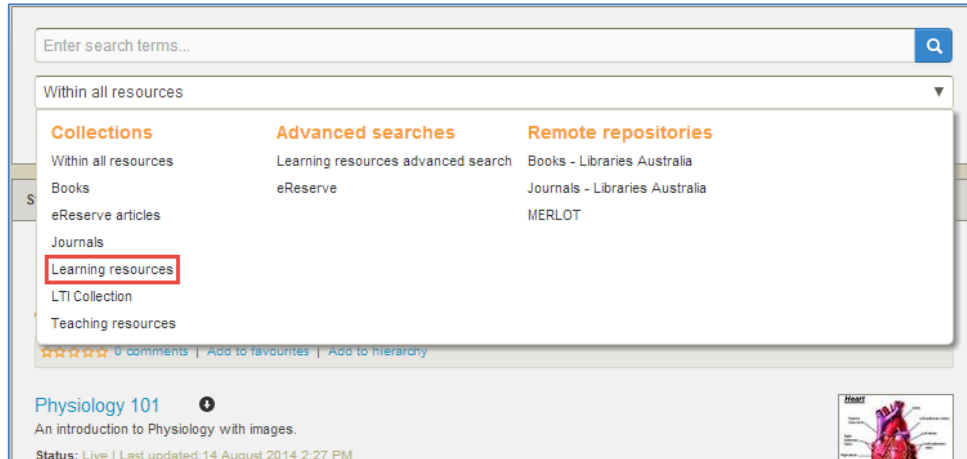
Figure 18 Select a collection

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

Advanced search

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

To conduct an advanced search

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

Figure 19 Select an advanced search
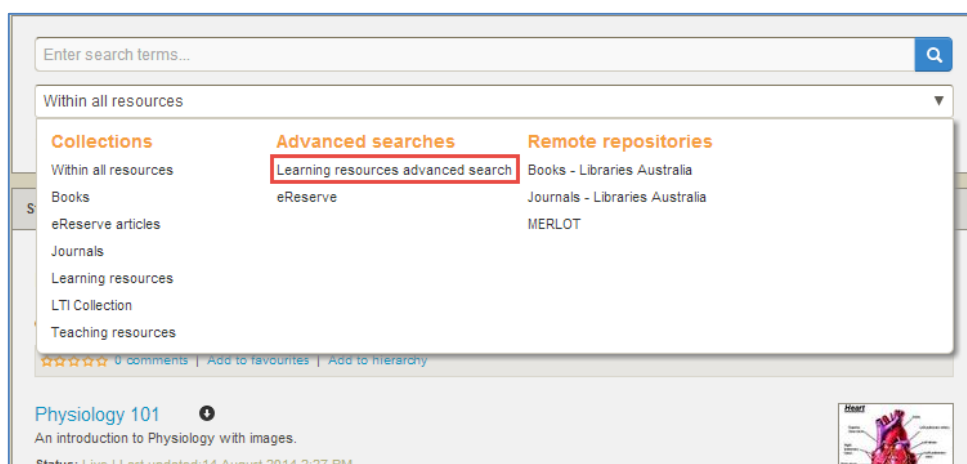
2. Select an advanced search (e.g. *Learning resources advanced search*) from the **Advanced searches** list. The advanced search criteria page displays. An example is shown in Figure 20.

Figure 20 Advanced search criteria page

(*NOTE: The appearance of the Advanced search criteria screen depends on the design of the selected search.*)

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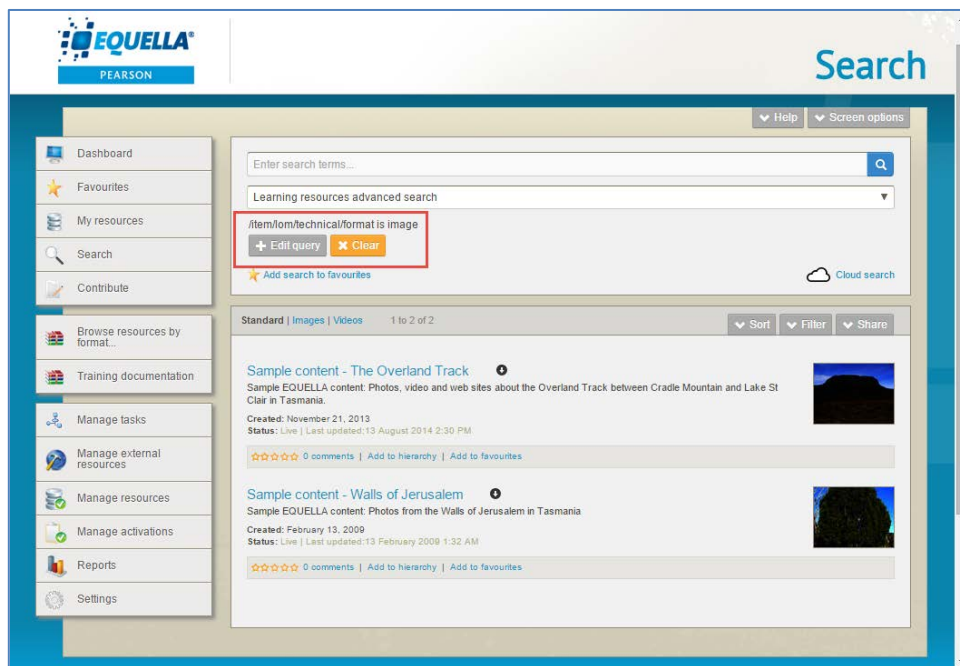
Figure 21 Advanced Search criteria in place

An additional section is added to the **Search** pane, as shown in Figure 21.

4. Select ![+ Edit query] from the search box to open the advanced search criteria page and change or refine the search criteria, or ![× Clear] to remove the criteria.

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

Cloud search

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 in the text field in the Search box 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.

NOTE: Cloud search can only find matches to the text search string entered in the edit box on a search page. As the OER has its own metadata schema, it can't use information selected from the Within drop-down list to further tailor the search results.

Viewing Cloud results in conjunction with a local EQUELLA search

The Cloud search occurs simultaneously with the standard EQUELLA search, so 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 in conjunction with a local EQUELLA search

1. From the Search page, enter a search term (e.g. *physiology*). The matching results display in the Results box. An example is shown in Figure 22.
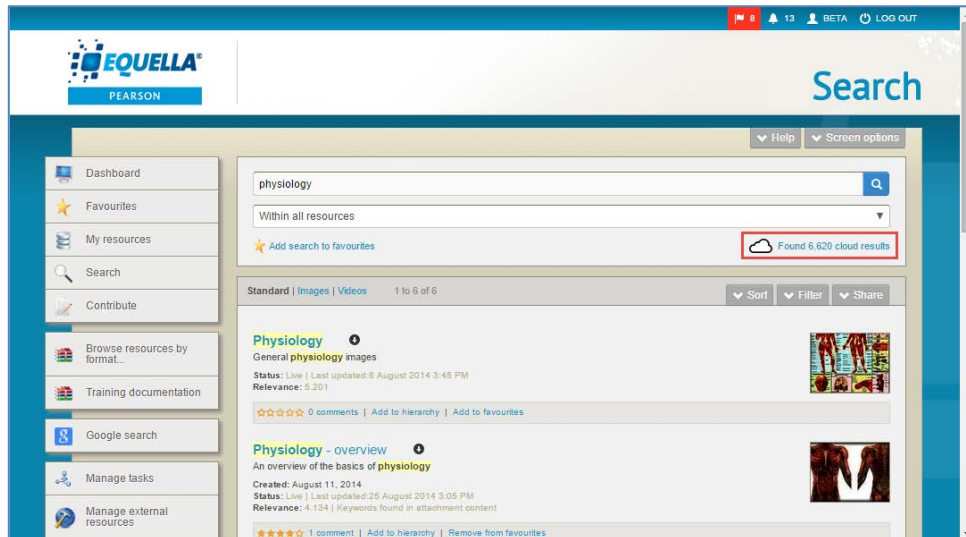
Figure 22 Search results page with available Cloud results

The system has also searched the cloud with the same search term, and found available results.

2. Click the **Found x cloud results** link to open the Cloud search page and view the matching cloud results. An example is shown in Figure 23.
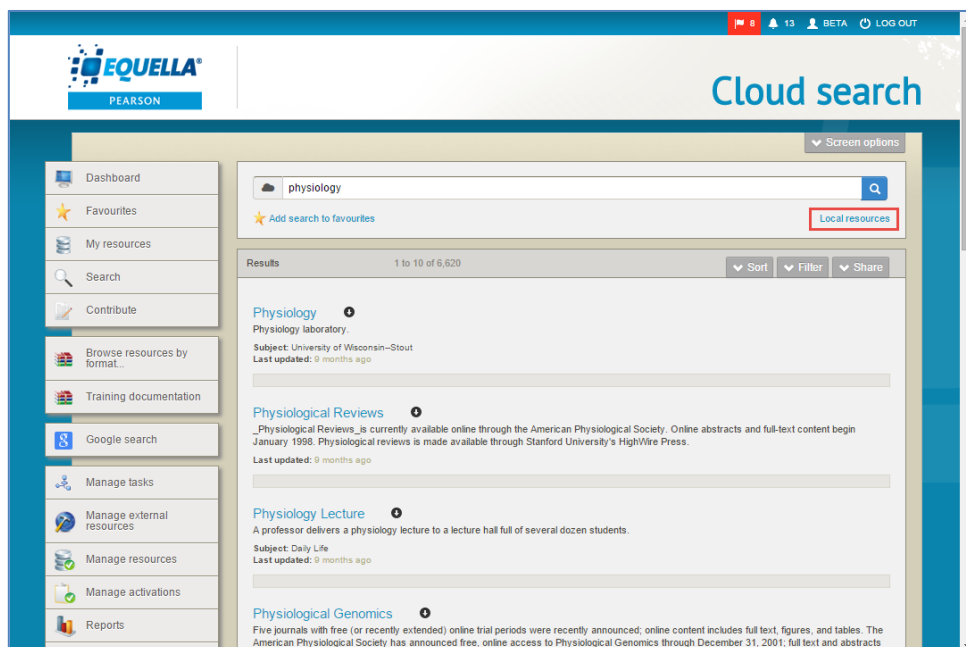
Figure 23 Cloud search page with matching results

Click the **Local resources** link to return to the Search page.

Searching the Cloud (OER)

Users can also search the cloud directly for relevant content.

To perform a Cloud search

1. From the Search page, click the **Cloud search** link in the bottom-right of the Search box. An example is shown in Figure 24.
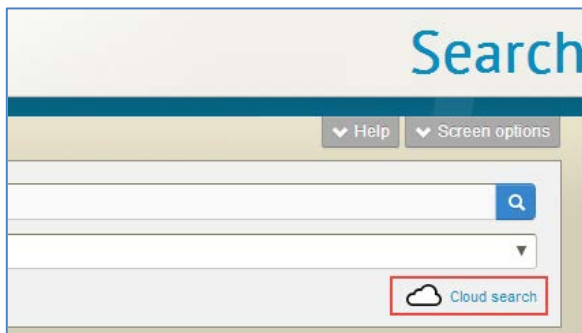
Figure 24 Cloud search link

The **Cloud search** page displays, as shown in Figure 25.
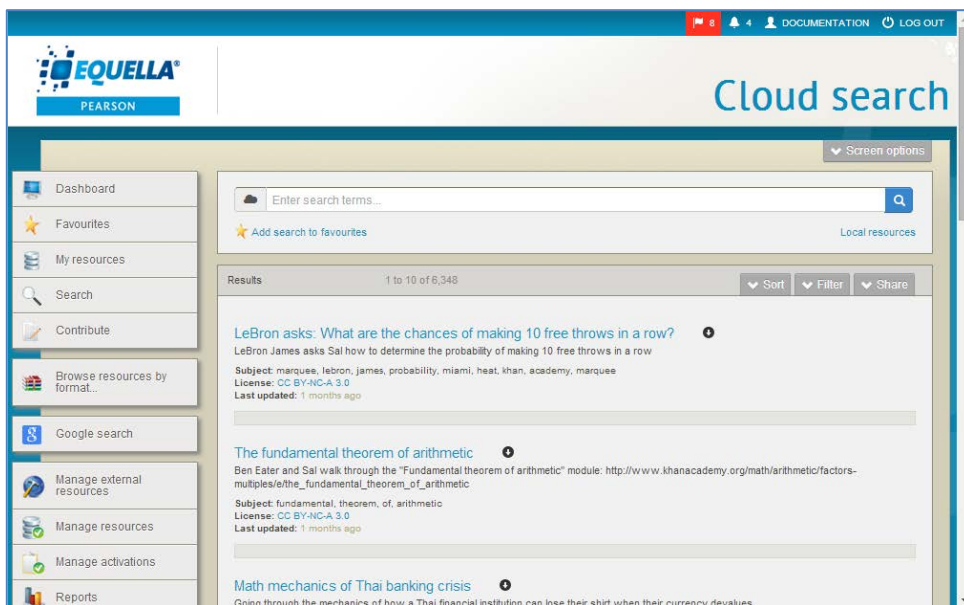
Figure 25 Cloud search page

2. Enter the required search term (e.g. *science*) then click [Q]. The matching search results display in the Results box. An example is shown in Figure 26.
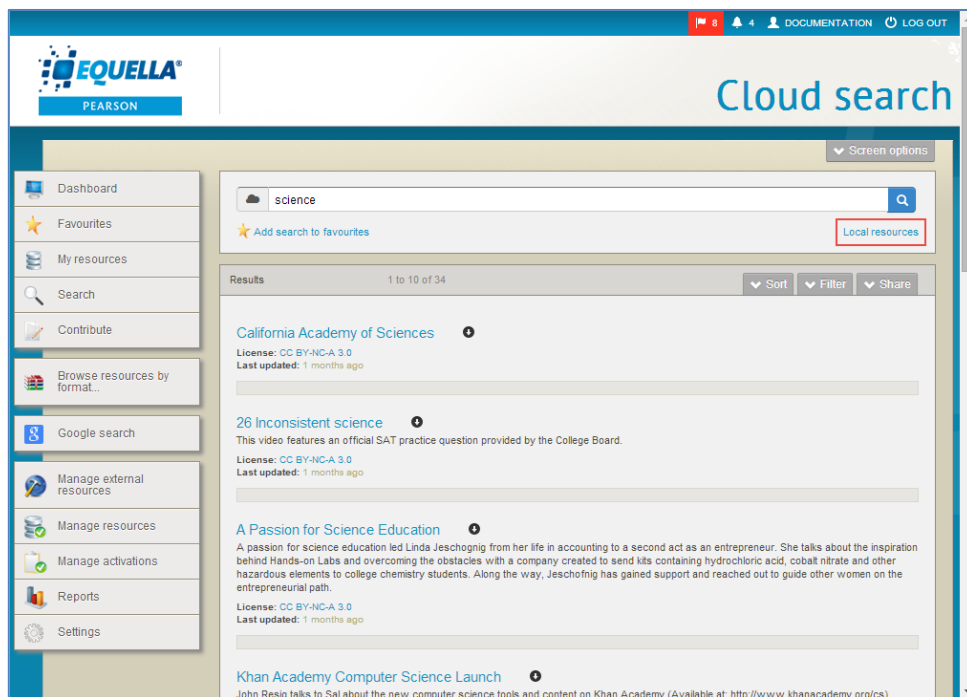
Figure 26 Cloud search with matching results

When performing a cloud search, the system automatically searches the local content for matching search term results. Click the **Local resources** link to view the local results.

The Cloud search functionality can be disabled by an administrator if not required, and enabled at another time. When disabled, the **Cloud search** link in the bottom-left of the Search box no longer displays. See Disable/Enable Cloud searching on page 77.

Cloud search sorting and filtering

The **Cloud** results page has **Sort** and **Filter** tabs to further drill down to relevant results. See Sorting, filtering and sharing results on page 28 for further information on sorting.

Filter Cloud 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 27.
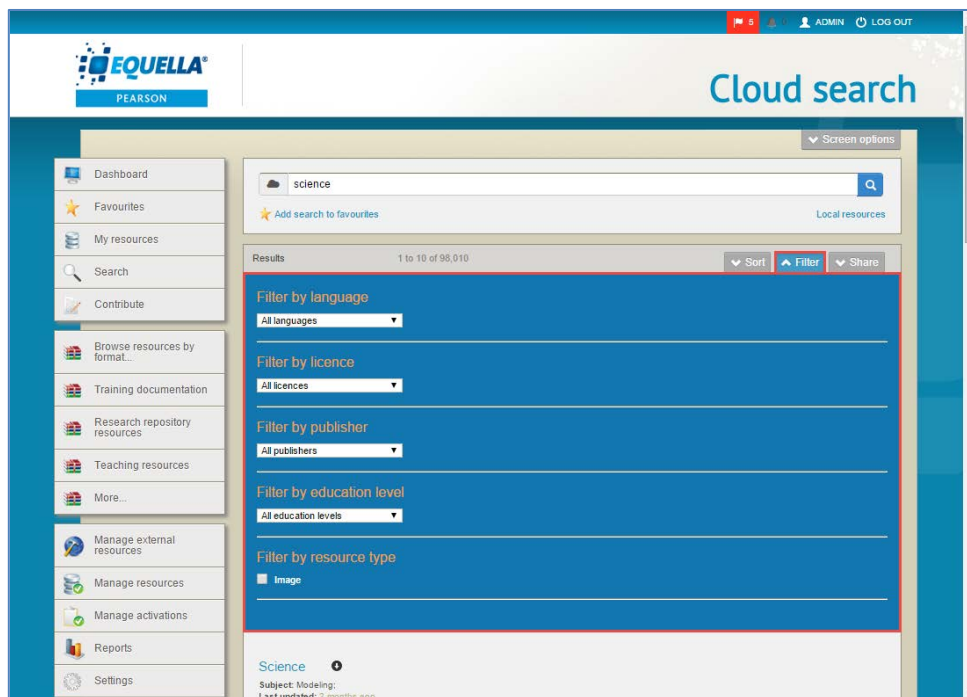
Figure 27 Cloud results filter pane

The following filters are included, and come from fields populated by OER contributors:

Filter by language – displays languages entered by OER contributors during contribution. Note that languages may display multiple times, depending on spelling, extra spaces etc. when entered during contribution. Select a language to view resources that have a matching value in the OER metadata.

Filter by licence – displays license types entered by OER contributors during contribution. Select a licence type to filter results to those that have a matching value in the OER metadata.

Filter by publisher – displays a list of publishers entered by OER contributors during contribution. Select a publisher to filter results to those that have a matching value in the OER metadata.

Filter by education level – displays a list of education levels entered by OER contributors during contribution. Select a level to filter results to those that have a matching value in the OER metadata.

Search results – Standard view
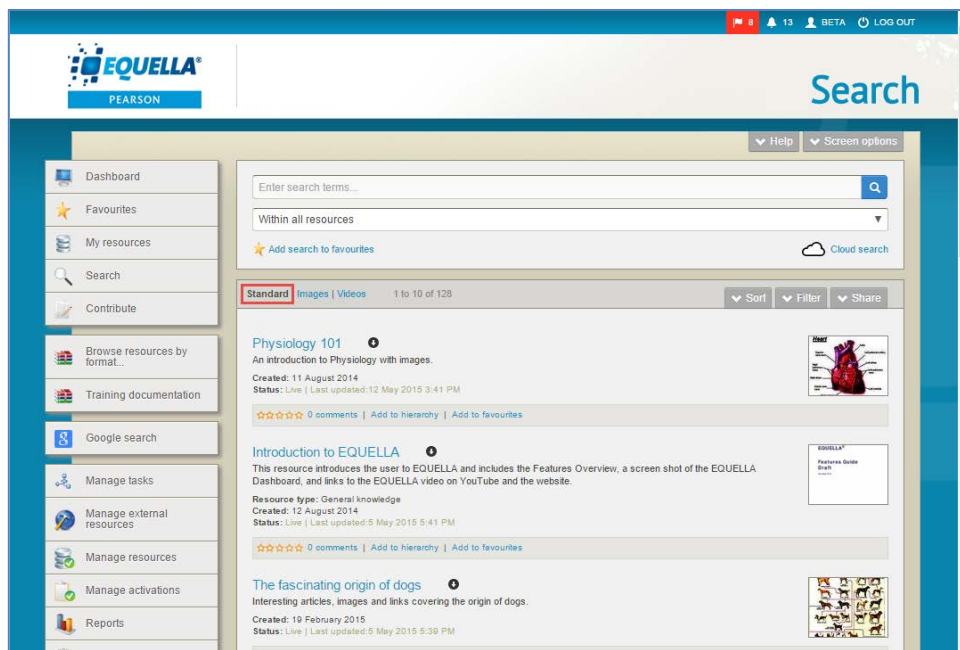
An example of a Search results page (Standard view) is shown in Figure 28.

Figure 28 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 33) and the **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:
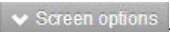
- **Title—**select this link to display the summary page.
- ⬇ - this drop-down icon displays next to the title when a resource has one or more attachments. Clicking the icon displays the attachments in either a structured or thumbnail grid format, depending on the collection's search results template 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*.
- **Last updated—**either the date the resource was last updated or the time period passed since the resource was last updated, depending on date display format configuration.
- **Star rating and <x> comments—**select this link to display the resource summary page where comments and ratings can be entered.
- **Add to favourites/Remove from favourites—**select this link to add the resource to, or delete it from the resource favourites list.
- **Add to hierarchy** – opens the **Modify key resource** page to add the resource to a hierarchy topic or sub-topic as a key resource.

Other elements on the Search page include:

- **Help**—click the button to display context-sensitive help at the top of the page. An example is shown in Figure 29. Depending on the context, links to other help topics can also display. Click the button again to hide the help pane.
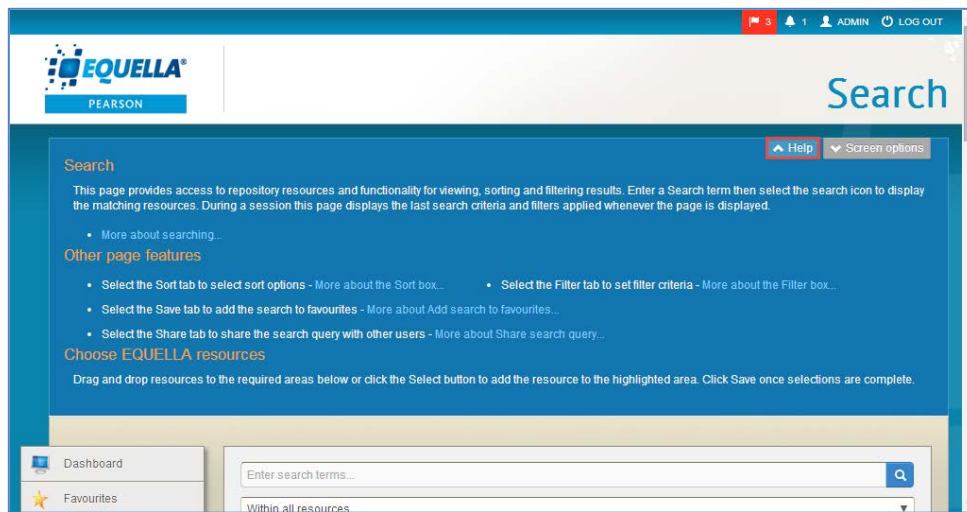
Figure 29 Help page

- **Screen options**—click the button to display the screen configuration options, which can include:

  - **Include results that are not live**—select the checkbox to display all results, regardless of their status. (*NOTE: This option will only display if set by your administrator. Additionally, only resources with a status of* Live *can be added to courses.*) This option is not relevant to the **Cloud** search results page.

  - **Number of results per page**—select how many results are displayed per page from the drop-down list.

    - **Minimum** - 10 results in Standard view, 30 results in Gallery view
    - **Medium** - 50 results in Standard view, 60 in Gallery view
    - **Maximum** – 100 results in Standard view, 90 in Gallery view. Note that this option is not relevant for the **Cloud** search results page.

  - **Search attachments** –uncheck if it is not required to search in attachments for the search terms entered in the search box.

  An example is shown in Figure 30.
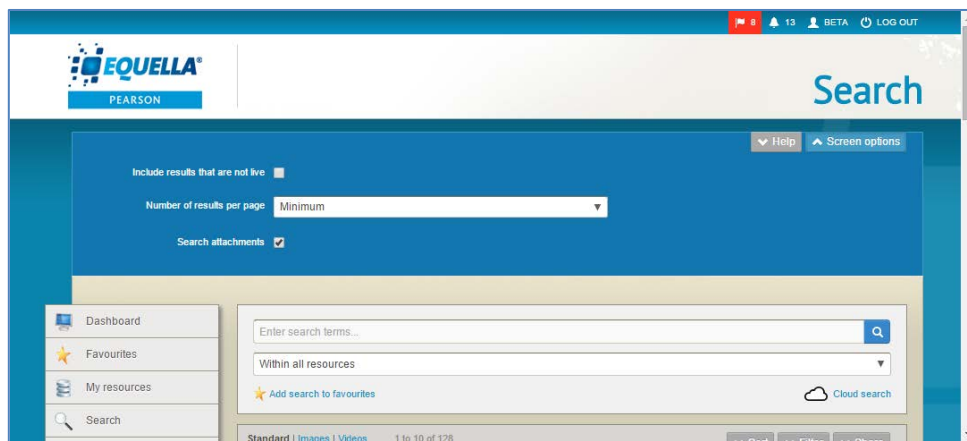
Figure 30 Screen options

Other standard results page elements include:

- **Add search to favourites** link—click to save the current search with a name to the Favourites search section. See <u>Add search to favourites</u> on page 27 for more information.

- **Sort** tab—provides options for sorting the results list. See <u>Sort results</u> on page 29 for more information.

- **Filter** tab—provides options for setting criteria to drill down to relevant search results. See <u>Filter results</u> on page 30 for more information.

- **Share** tab—search results can be shared with other users by sending them the search results for their use. See <u>Share results</u> on page 32 for more information.

Add search to favourites

Useful searches can be saved as favourites by users, then viewed from the **Favourites** page.

Clicking the **Add search to favourites** link on the bottom-left of the *Search box* displays the **Add search to favourites** dialog where a name is entered to help identify the search. An example is shown in Figure 31.
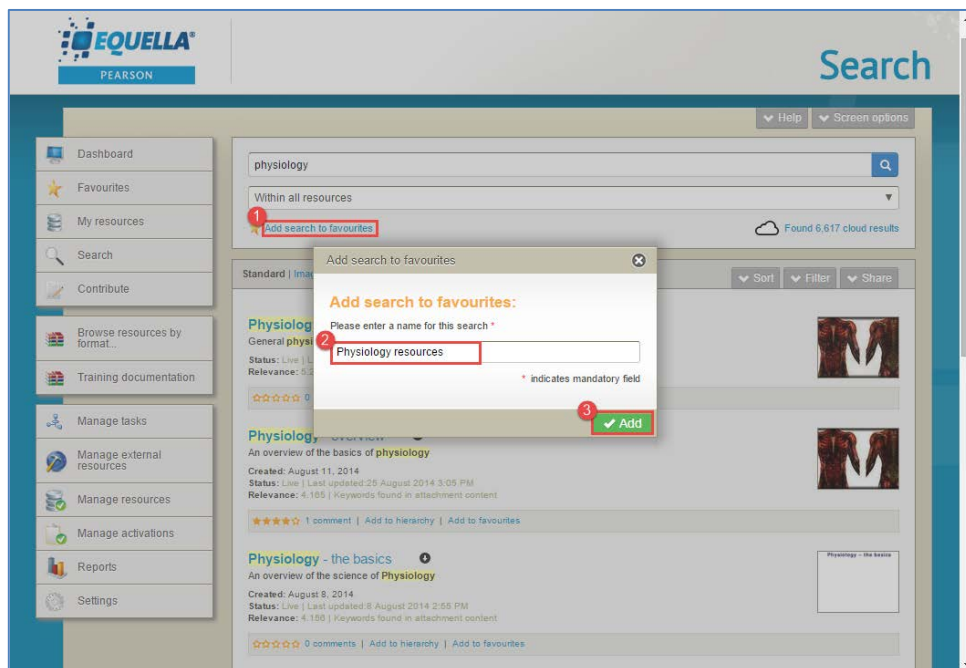
Figure 31 Add search to favourites dialog

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

Sorting, filtering and sharing results

Once search results display on the results screen, resources can be sorted and filtered to drill down to the most relevant results. Every results page in the EQUELLA system has sorting and filtering options, and these options may change, or additional options may display, depending on the type of results list. For example, the My resources results page has different filter options (*Filter by keyword, Filter by collection and Filter by date modified)* than the Search results page (*Filter by owner, Filter by date modified*). Additionally, search results can be shared with other users. An example is shown in Figure 32.
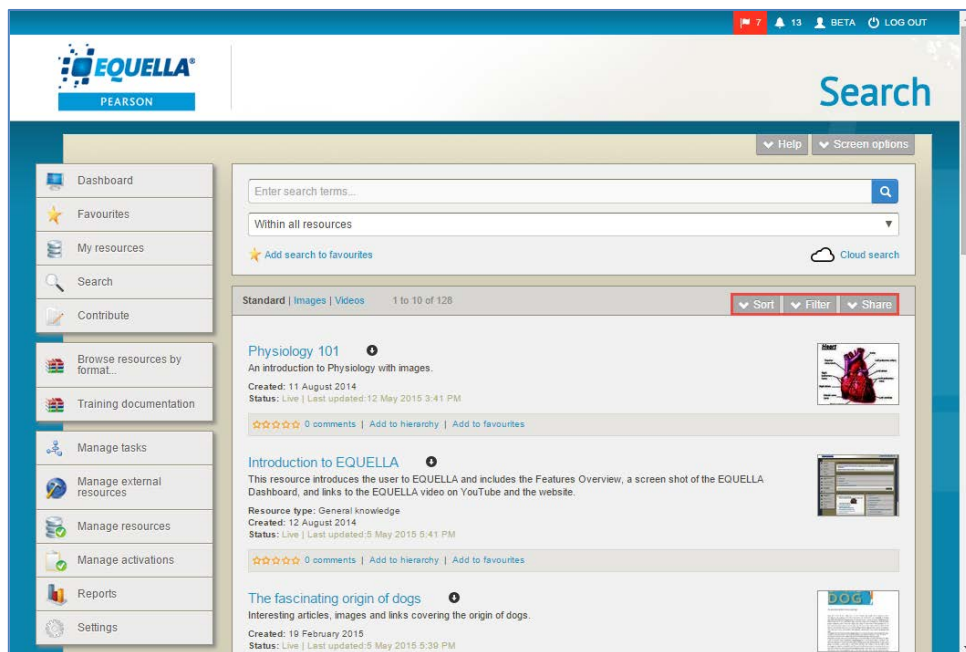
Figure 32 Sort, filter and share tabs

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 33.

Figure 33 Sort pane

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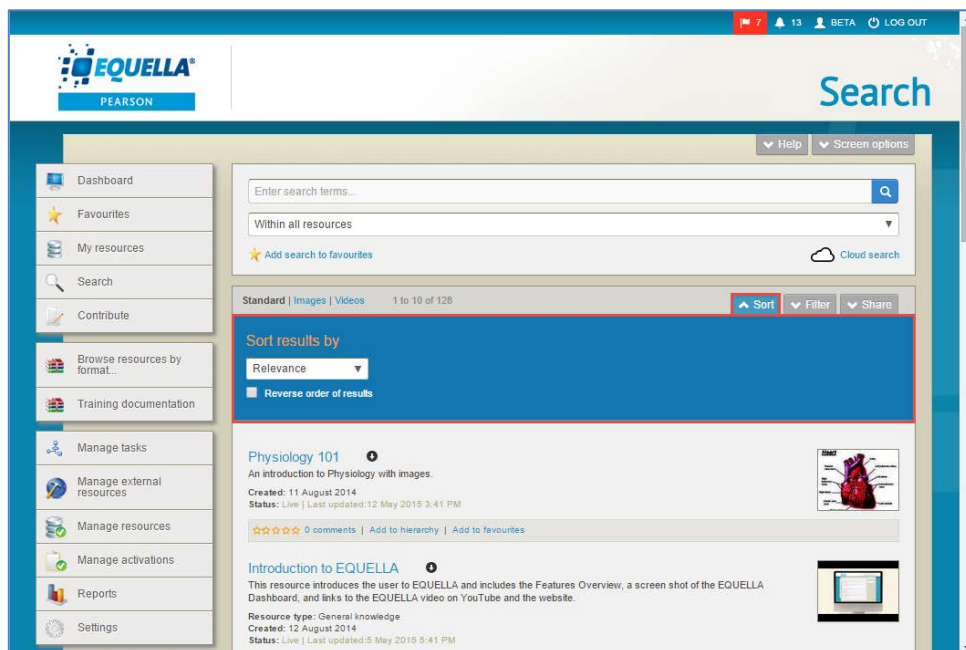
Click the **Sort** drop-down again to toggle the Sort pane display.

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 34.
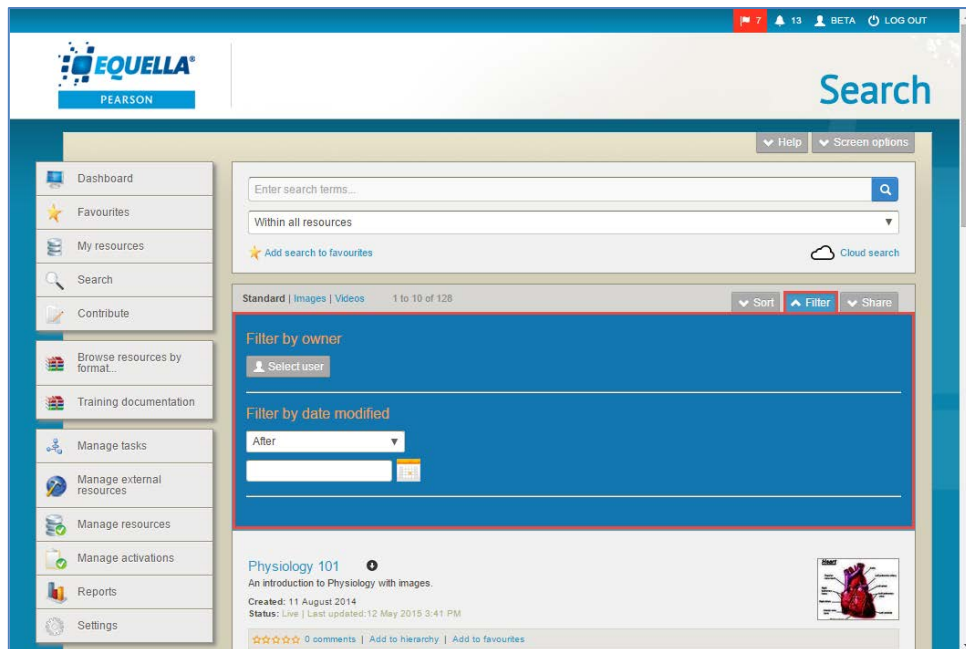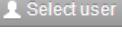

Figure 34 Filter pane

The following filters are included:

Filter by owner

Click [Select user] to display the **Select owner to filter by dialog**. Enter search terms and click [Search] to display a list of matching results. An example is shown in Figure 35.
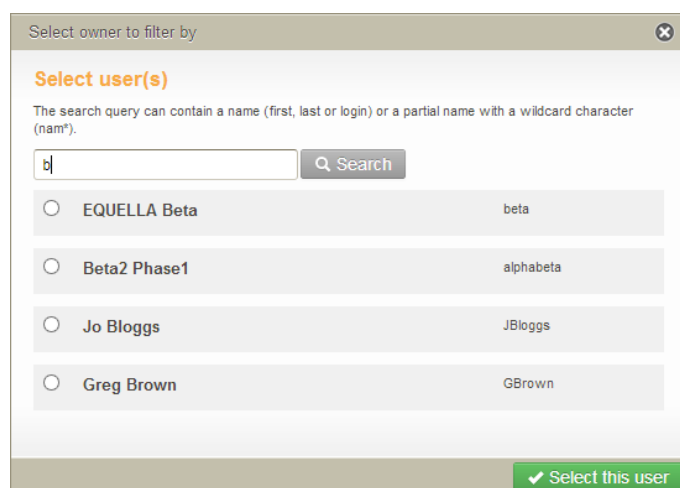
Figure 35 Select owner to filter by dialog

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** pane. An example is shown in Figure 36.
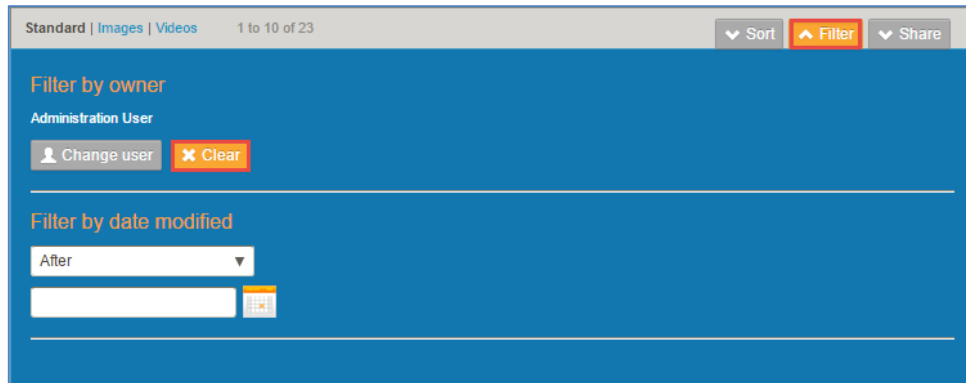
Figure 36 Example with owner filter set

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 icon to display a calendar control. An example is shown in Figure 37.

Figure 37 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 38.
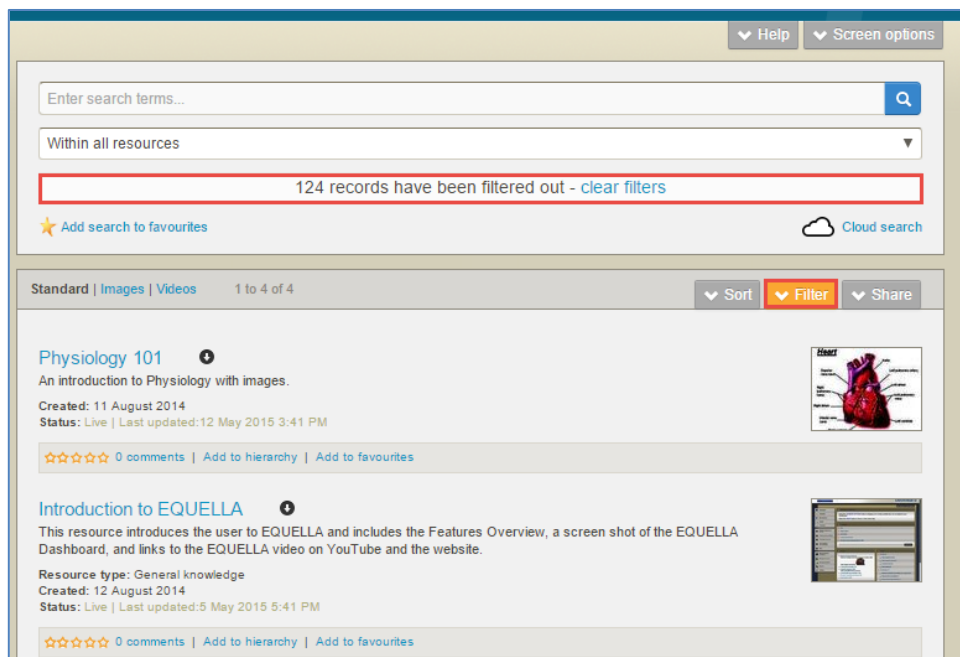
Figure 38 Filter message

Select the **clear filters** link to remove 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 39.
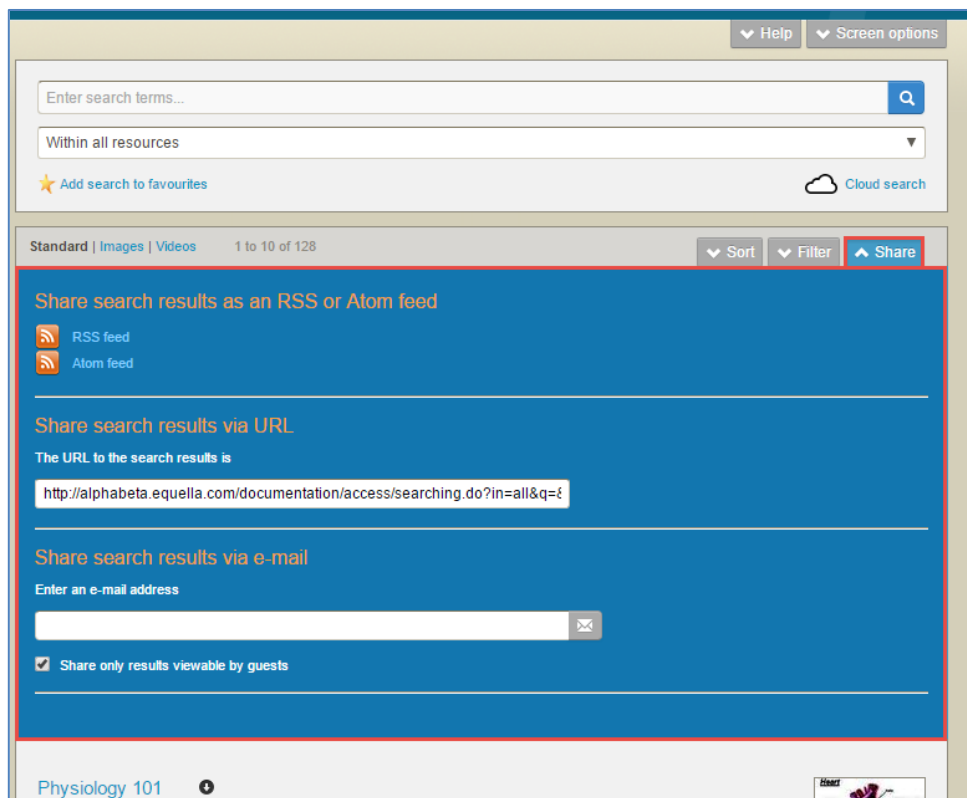
Figure 39 Share search results dialog

- **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 [image]. 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.

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 (for those resources with image attachments). An example is shown in Figure 40.
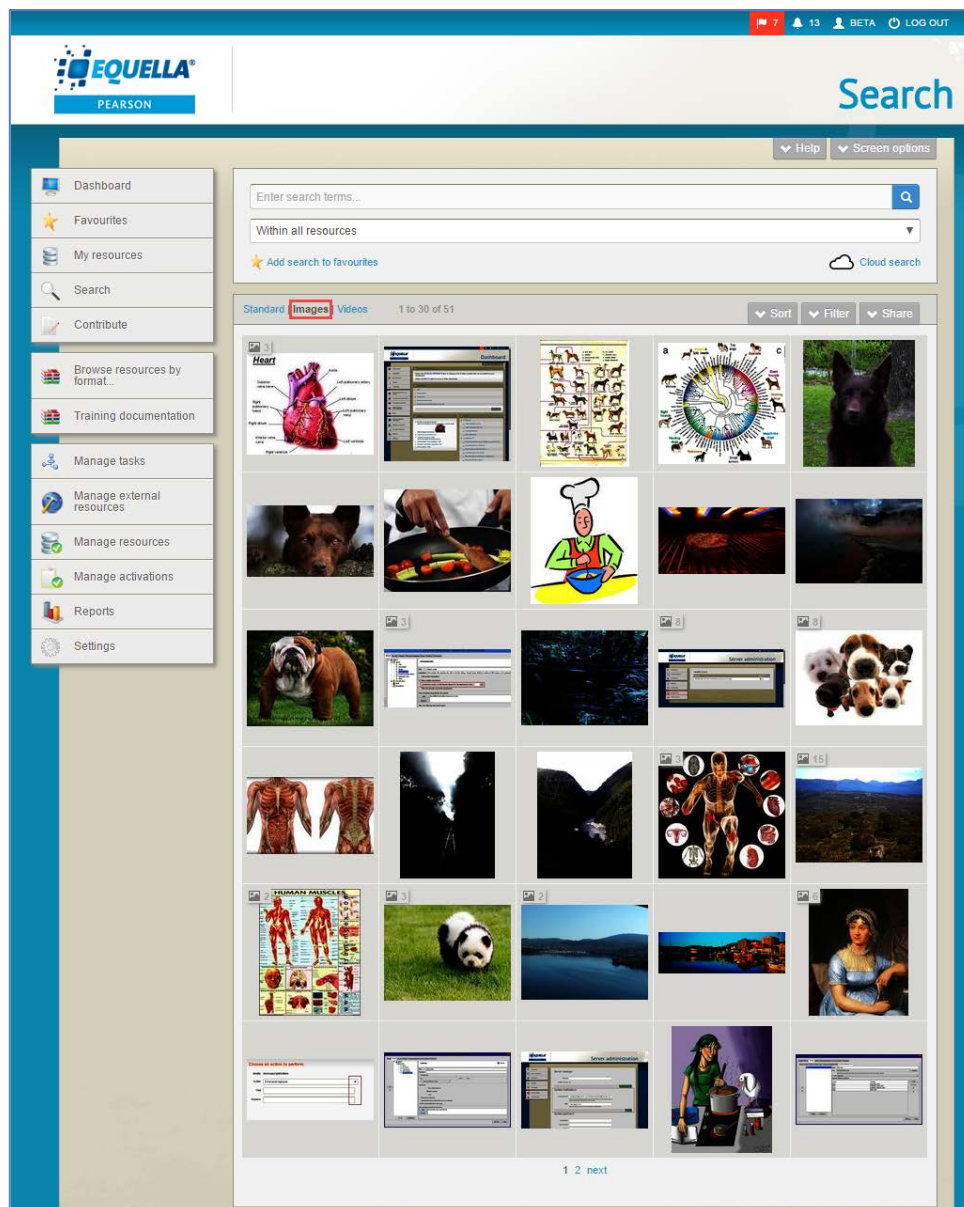
Figure 40 Images view

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 41.
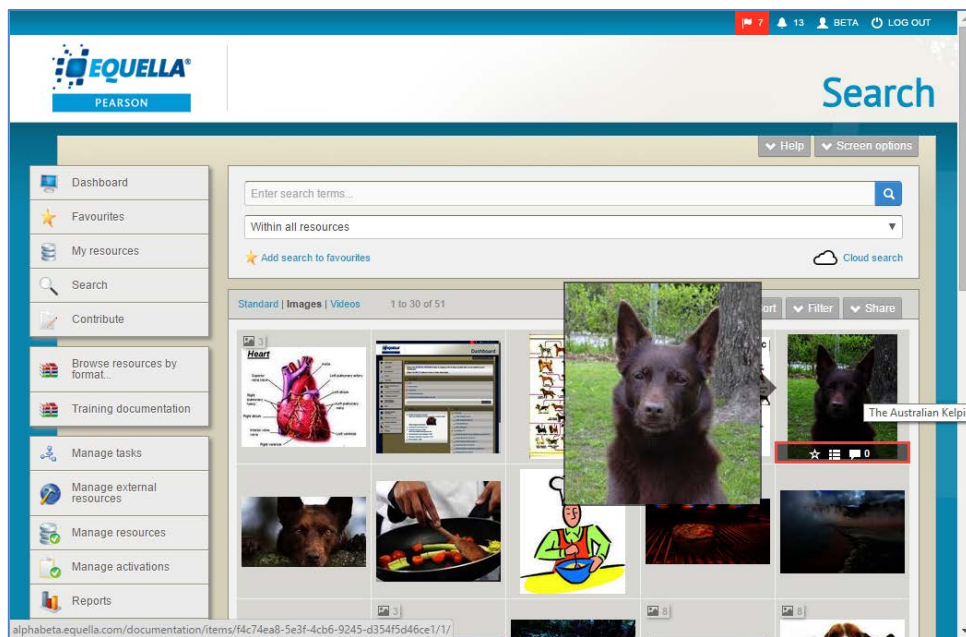
Figure 41 Images view - image enlarged with mouse hover

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.

▤ - Click to open the **Modify key resource** dialog to add or delete the resource as a key resource from a hierarchy.

💬1 - Click to open the Resource summary page with a focus on the Comments section.

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

The Images view can be disabled by an administrator if not required, and enabled at another time. When disabled, the **Images** link in the top left of the results box no longer displays. See Gallery views on page 77 for further information.

Multiple image file count

One image thumbnail is used to represent an EQUELLA resource on the Images page. Resources may have multiple images attached, and in this case, the total number of image file attachments displays in the top left corner of the thumbnail. An example is shown in Figure 42.
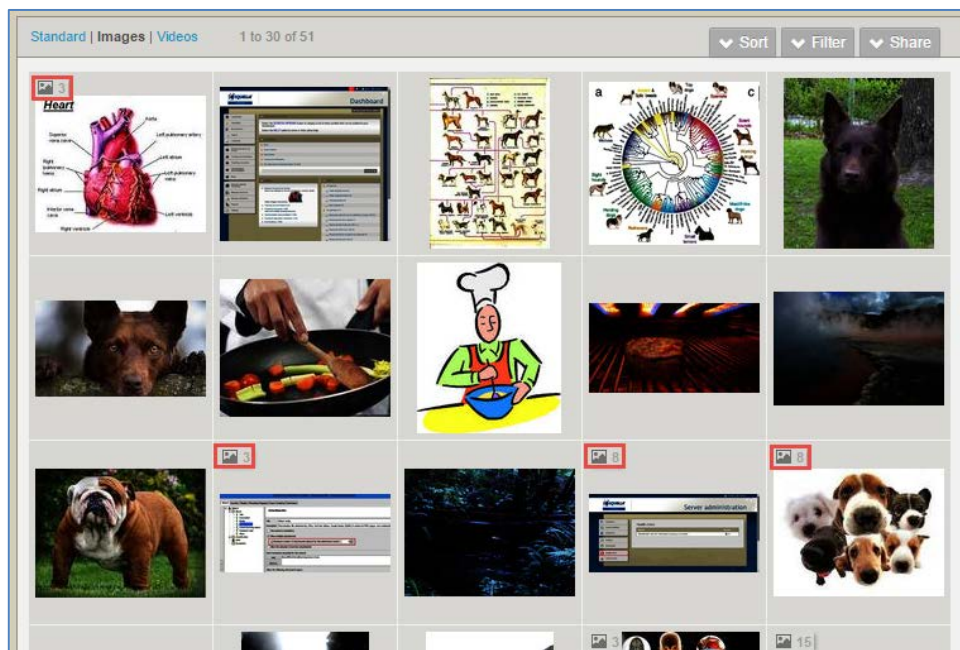
Figure 42 Multiple image file counts

The indicators alert users to the presence of other images, and clicking on the image thumbnail opens the Resource summary so all image attachments can be viewed.

The file count can be disabled by an administrator if not required, and enabled at another time. See Gallery views on page 77 for further information.

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.

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 43.
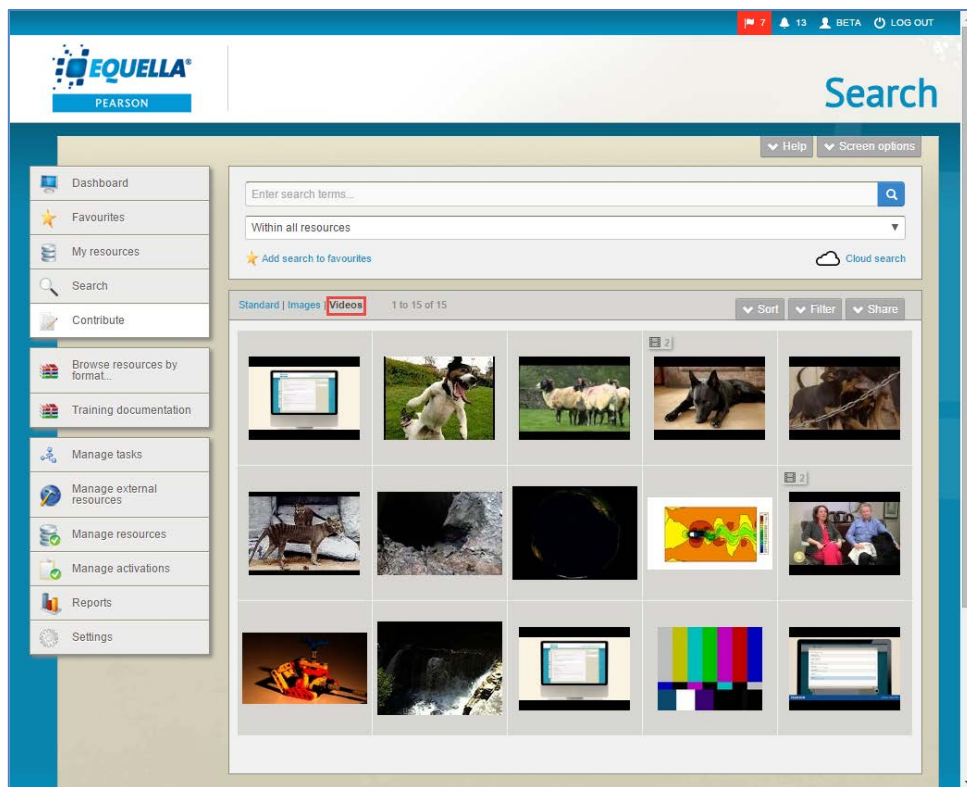
Figure 43 Videos view

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 the preview. To stop playing the preview, point the mouse away from the preview box. An example is shown in Figure 44.
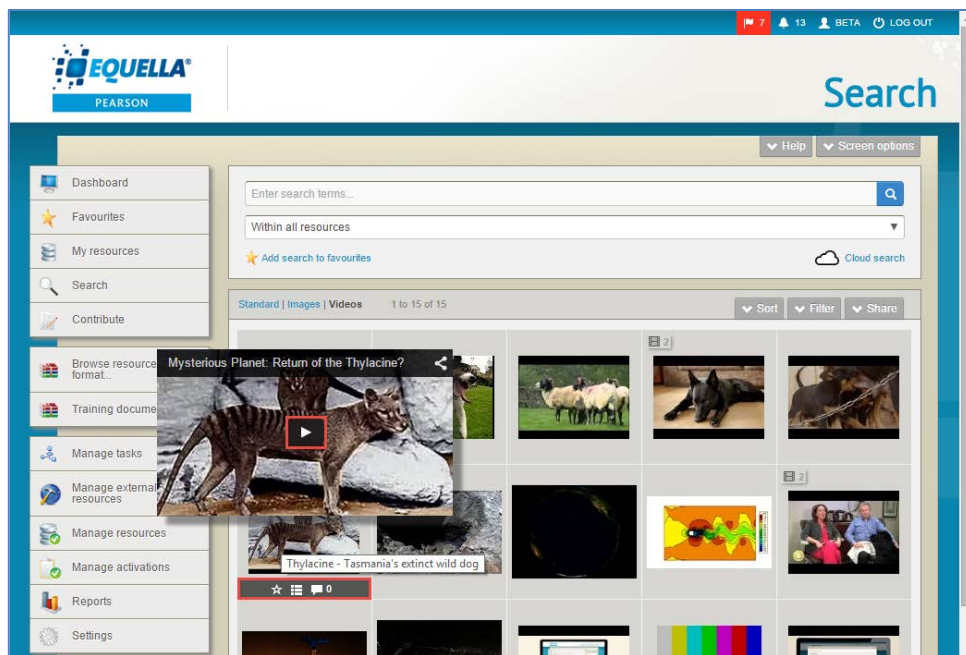
Figure 44 Videos view - video enlarged with mouse hover

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.

▤ - Click to open the **Modify key resource** dialog to add or delete the resource as a key resource from a hierarchy.

💬¹ - Click to open the Resource summary page with a focus on the Comments section.

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

The Videos view can be disabled by an administrator if not required, and enabled at another time. When disabled, the **Videos** link in the top left of the results box no longer displays. See Gallery views on page 77 for further information.

Multiple video file count

One video thumbnail is used to represent an EQUELLA resource on the Videos page. Resources may have multiple video attachments, and in this case, the total number of video attachments displays in the top left corner of the thumbnail. An example is shown in Figure 45.
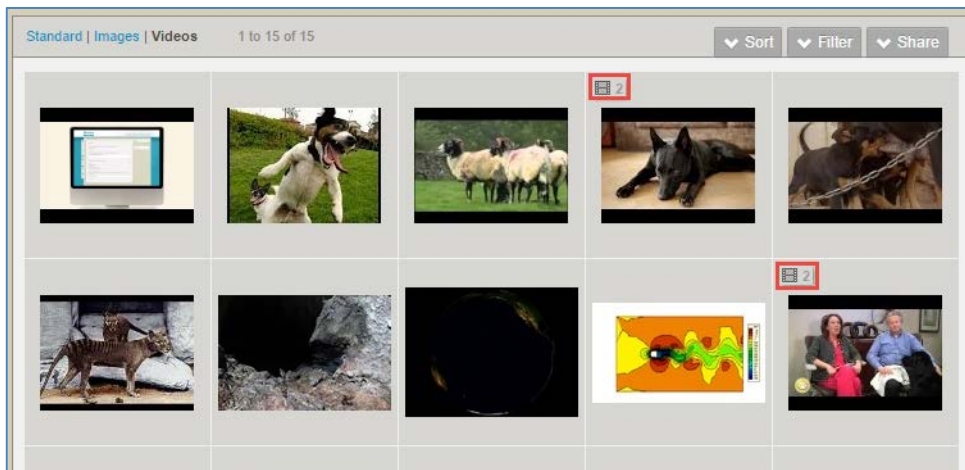
Figure 45 Multiple video file counts

The indicators alert users to the presence of other videos, and clicking on the video thumbnail opens the Resource summary so all video attachments can be viewed.

The file count can be disabled by an administrator if not required, and enabled at another time. See Gallery views on page 77 for further information.

Search Remote repositories

External (remote) repositories can be searched and the results imported directly to a contribution wizard. Using this search method can increase accuracy and save time entering information manually.

To conduct a remote repository search

1. Click the **Within** drop-down arrow to display the available search categories, then select a remote repository from the **Remote** repositories list (e.g. *MERLOT*)*.* An example is shown in Figure 46.
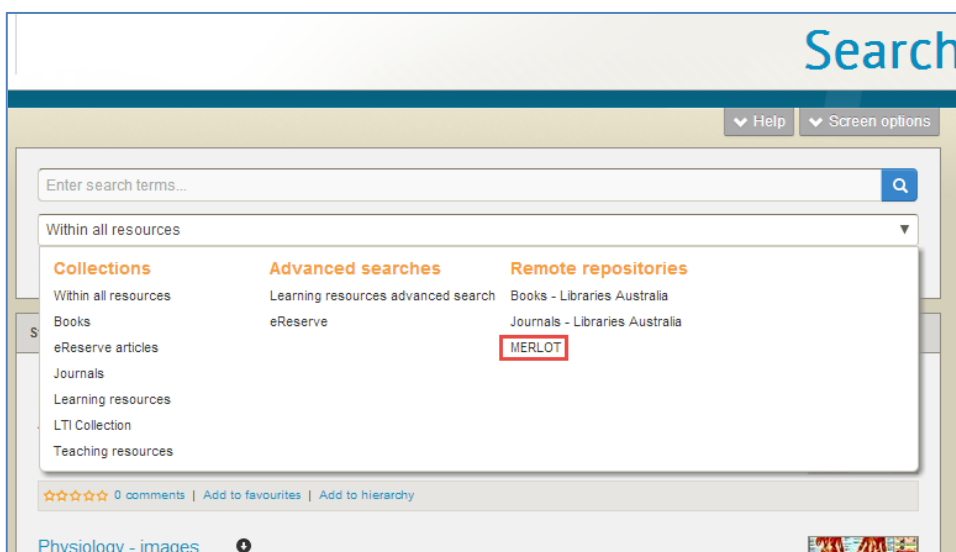
Figure 46 Access Remote repositories search

The MERLOT searching page opens. An example is shown in Figure 47.
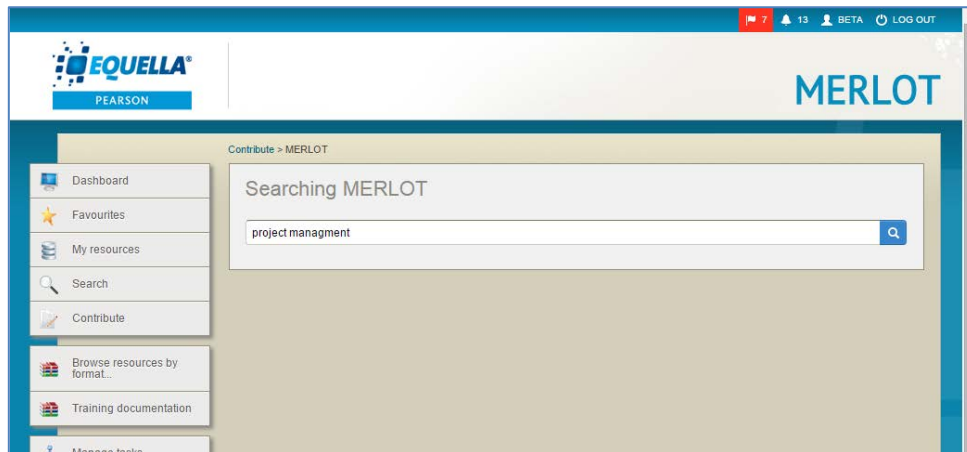
Figure 47 MERLOT Searching page

2. Enter search terms (e.g. *Project management*) and click [Q] to return matching results.

MERLOT sort and filter options

The MERLOT search results box has **Sort** and **Filter** tabs at the top.

Most of the options in these sort and filter boxes are specific to MERLOT so won't appear on other search result pages.

Select a resource from the **Results** list (e.g. *Introduction to Project Management*) to display the resource details.

To import results

1. Click [✓ Import] to display a contribution wizard. The collection is defined in the Administration Console—Remote Repositories tool. (See the *EQUELLA Remote Repositories Configuration Guide* for more information.) An example is shown in Figure 48.

Figure 48 Contribution wizard with pre-filled fields

See the *EQUELLA Contribution User Guide* for more information on contributing resources.

Other remote repository types

Search boxes and sorting and filtering options may differ depending on the types of remote repositories set up in your EQUELLA system. An example of the Libraries Australia remote repository search results screen is shown in Figure 49.
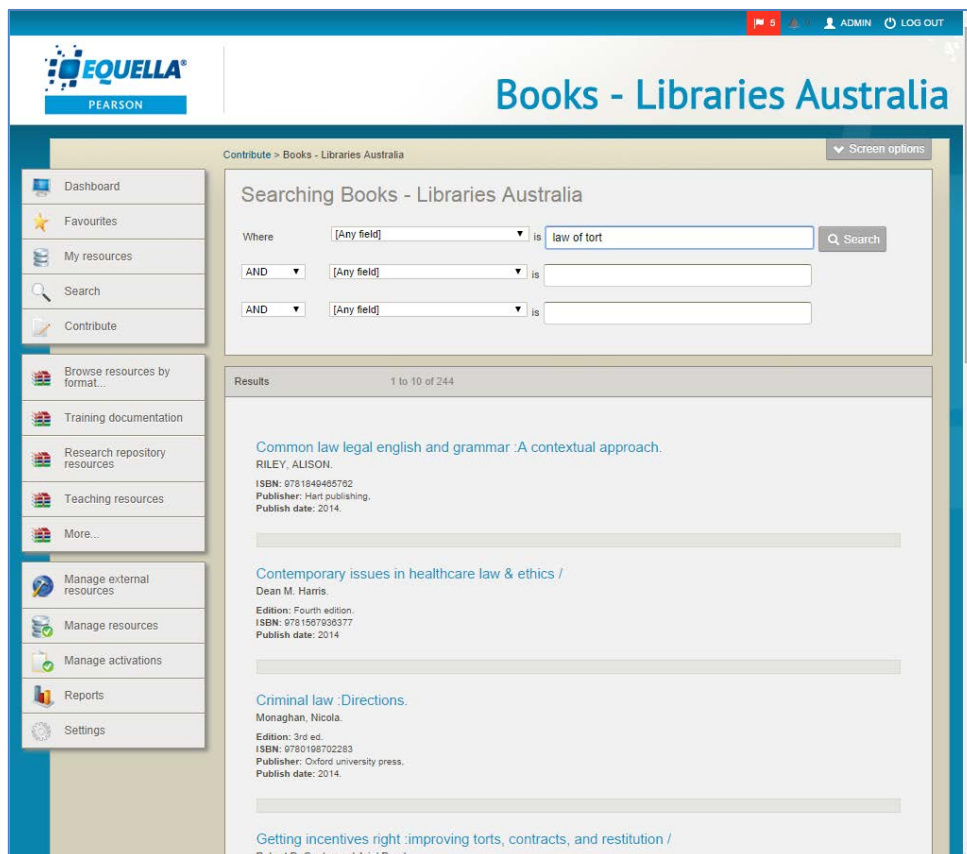
Figure 49 Libraries Australia search results page

(*NOTE: there are no sort or filter options for this type of remote repository search.*)

Favourites

Users can save bookmarks to resources and searches they find useful by using EQUELLA's 'Favourites' functionality. Depending on how your EQUELLA system is configured, resources and searches added to favourites are listed as links in the **My Favourites** portlet on the Dashboard page. Select a link to go straight to the resource summary page for a resource, or the search results page for a search.

The Favourites page is accessed by selecting **Favourites** from the navigation menu. An example showing both access points is shown in Figure 50.
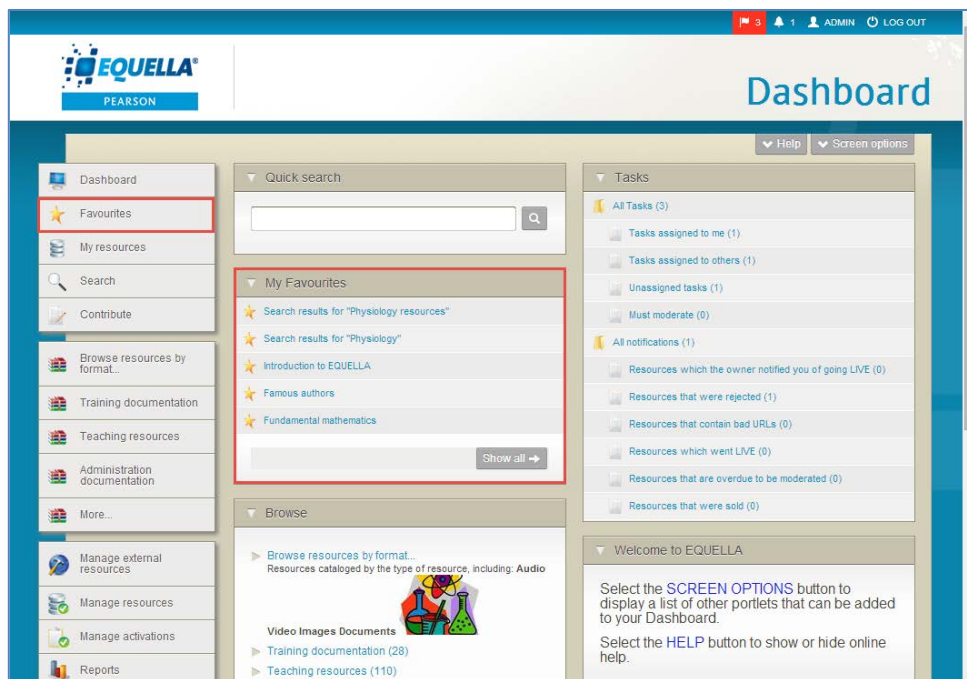
Figure 50 Access to Favourites

Selecting the **Favourites** link from the navigation menu opens the **Favourites** page which consists of two main sections, **Resources** and **Searches**. Selecting the link to either one under the *Favourites* heading will switch the list of results.

Resources

The **Resources** list contains the same resource details as a search results list, with the addition of two further fields, as highlighted in Figure 51. A **Tags** field lists the tag values entered into the dialog when adding the resource to favourites. (See *EQUELLA My Resources User Guide* for more information on adding resources to favourites.) This field is not visible if no tags have been set. A **Date favourited** field shows either the date the resource was added to favourites or how much time has passed since this resource was added to favourites. depending on the date format settings.
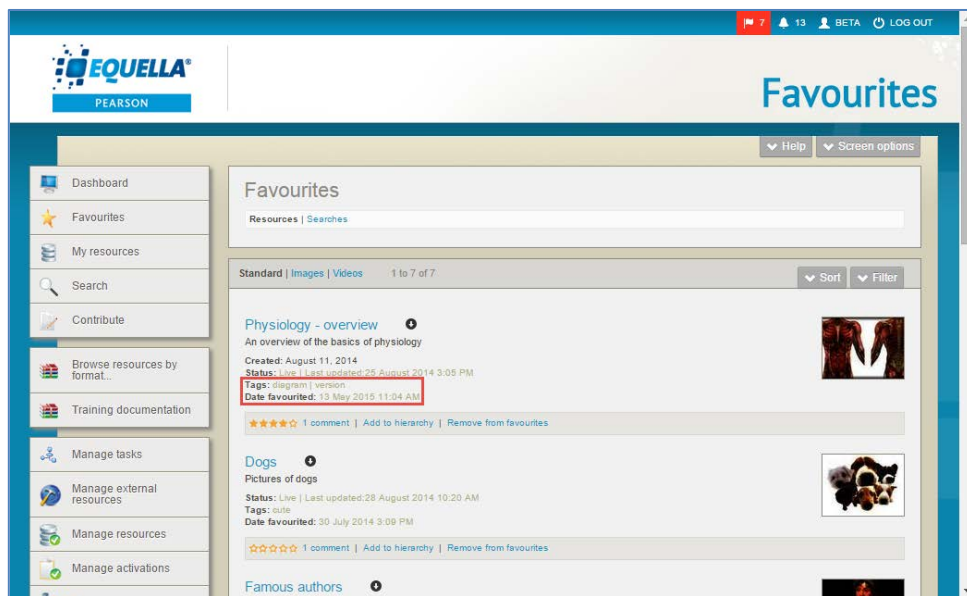
Figure 51 Favourite resources

Sort and filter

On the **Favourites** - **Resources** page, the **Sort** and **Filter** panes have some additional options not found on the Search results page.

In addition to **Relevance**, **Date last modified**, **Title** and **User rating**, there is a **Date favourited** option in the sort drop-down. Selecting this option will sort the resources in order of the date they were added to favourites.

The **Filter** pane has a **Filter by keyword** edit box, which allows the user to search by keywords within the favourites resource list. The system searches for matching keywords in the resource title, description, attachment name and tags fields. The favourites filter pane doesn't have the **User** filter.

Searches

Click the Resources link on the Favourites page to display any saved searches. Each search in this list may display the following (an example is shown in Figure 52):

- A name, set when adding the search to favourites. (See Add search to favourites on page 27 for more information). Selecting the name link takes the user to the search results page when clicked.

- The search criteria that were requested, for example '*equella*' in the search text box, '*Published*' from My Resources etc.

- a **✕ Remove** button. Clicking this button will remove the search from the list of favourites.

Figure 52 Favourite searches

Click on a saved search title to view the matching results for that search.

Sort and filter

On the **Favourites - Searches** page, the **Sort** and **Filter** panes have some additional options not found on the Search results page.
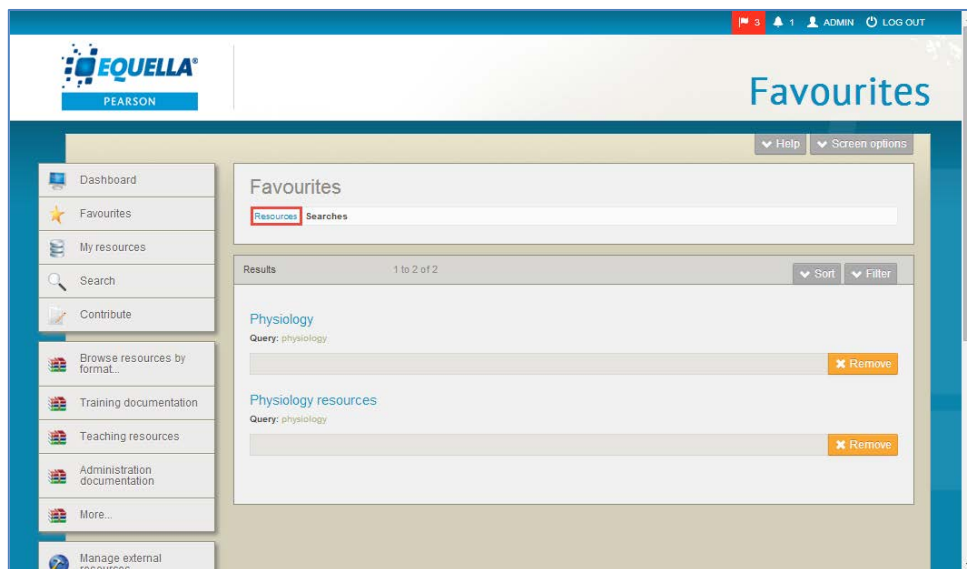
In addition to **Relevance**, **Date last modified**, **Title** and **User rating,** there is a **Date favourited** option. Selecting this option will sort the searches in order of the date they were added to favourites.

The following filter options are available:

- **Filter by keyword—**allows the user to enter keywords to search within the **Favourites – Searches** page. The system searches for matching keywords in the saved search title.

- **Filter by date modified**—select a qualifier from the drop-down list (**After**, **Before**, **Between** or **On**), then click the calendar field or icon to display a calendar control.

My resources

My resources displays resources that belong to the currently logged in user.

Pre-defined criteria are displayed as links across the top of the page, with the current selection shown in black and the others in blue. An example with **Published** resources selected is shown in Figure 53.
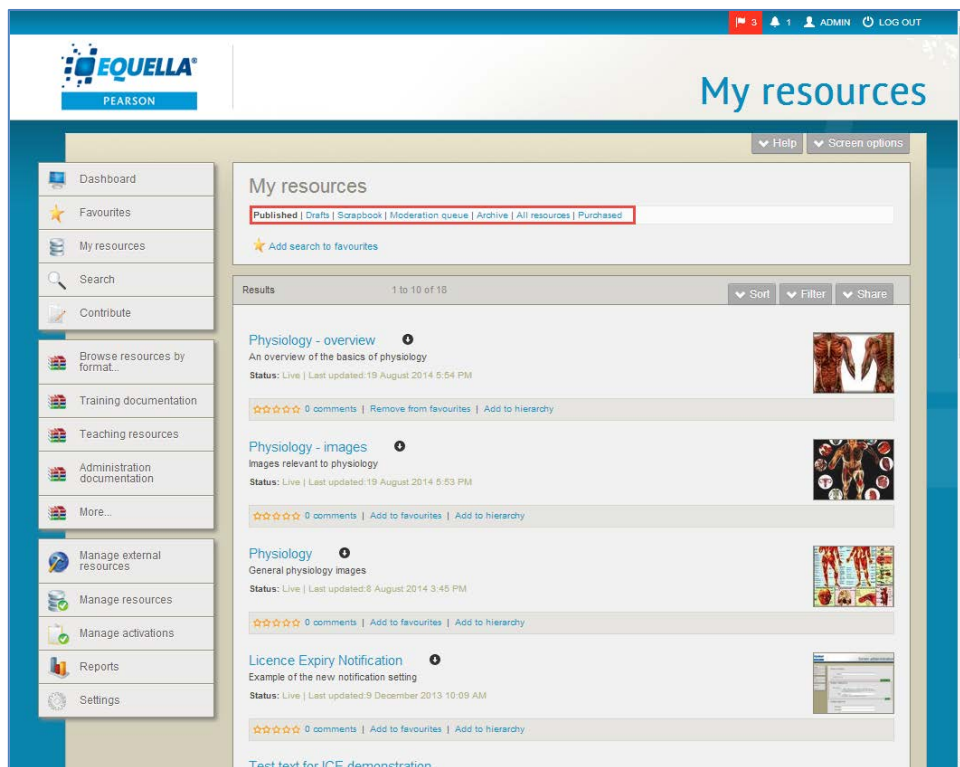
Figure 53 My resources grouping links

Click on a link to change the results displayed. Available links are:

- **Published—**displays resources that are in a *live* state through having been moderated or through belonging to a collection that does not require moderation. Additionally, resources with a status of review are displayed, and are live resources which are due for review.

- **Drafts**—resources that are under construction.

- **Scrapbook**—displays personal files or web pages belonging to the user. These items have not been published to the EQUELLA Digital Repository, and they cannot be viewed, edited or deleted by other users.

- **Moderation queue**—resources that have been submitted for moderation, and are still at some point in the moderation workflow.

- **Archived**—resources that have been *live* but are now superseded by a new version. These resources are no longer available to repository users other than the resource owner and the system administrator.

- **All resources—**all the resources the user owns or has permission to view.

- **Purchased-** resources that have been purchased using the EQUELLA Store front function. (See the *EQUELLA Store Front User Guide* for further information.)

Filter

From the My resources results pages, the following filter options may be available:

- **Filter by keyword**—allows the user to enter keywords to search within the My resources page. The system searches for matching keywords in the resource title, description and attachment name.

- **Filter by collection**—select the required collection from the drop-down list to see only resources belonging to that collection. Not available for *Scrapbook* items.

- **Filter by date modified**—select a qualifier from the drop-down list (**After**, **Before**, **Between** or **On**), then click the calendar field or icon to display a calendar control.

- **Filter by workflow task** –select a task name from the drop-down list to see only resources at that task in the workflow.

- **Filter by status**—select a status from the drop-down list (*All statuses, Draft, Live, Rejected, Moderating, Archived, Suspended, Deleted, Review or Personal*). Check the '*Only show items in moderation*' checkbox to display resources currently in the moderation workflow. (That is, resources with the status of *Moderating or Rejected.*) Only available for *Moderation queue* and *All resources.*

An example with *All resources* selected is shown in Figure 54.
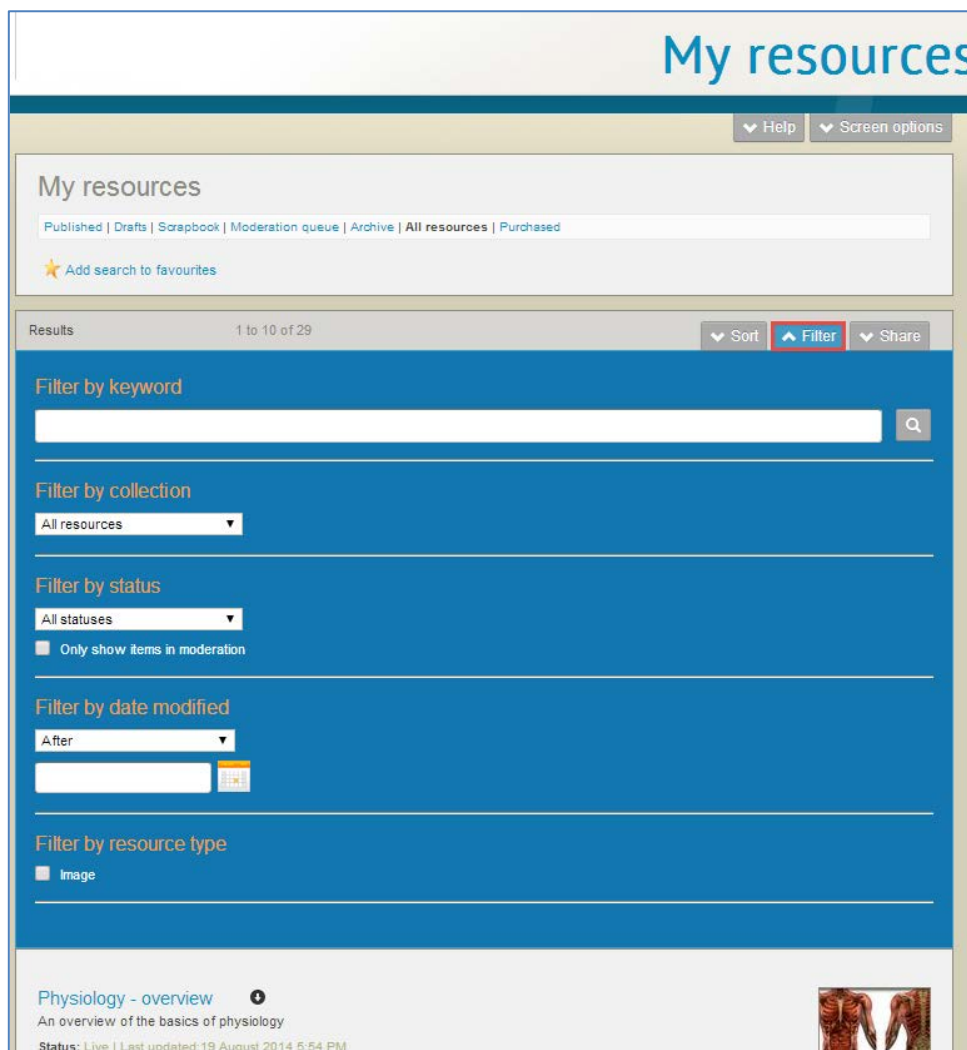
Figure 54 My resources filters

Refer to the *EQUELLA My Resources User Guide* for more information.

My tasks

My Tasks lists any tasks that require moderation by the currently logged in user. The My tasks page is accessed by selecting the **Tasks** icon at the top-right of any EQUELLA page. An example is shown in Figure 55.
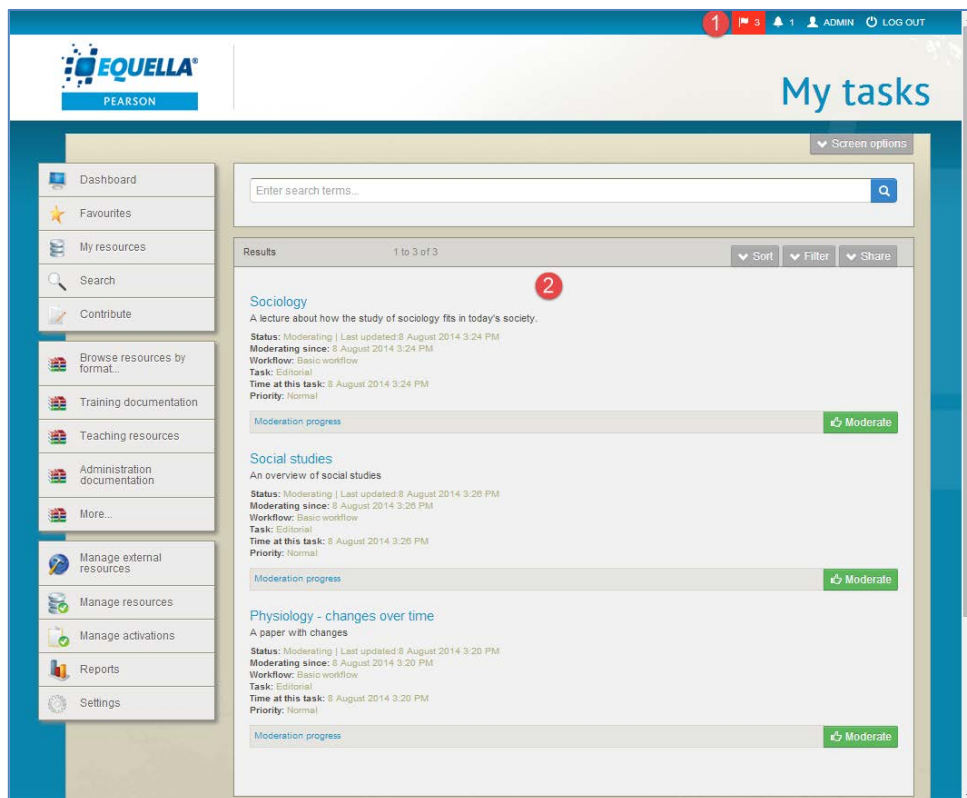
Figure 55 My tasks page

A search text box is displayed at the top of the page to enter keyword searches, and each result displays the following:

- **Title**—the name of the resource. Select this link to go to the **Task: Edit Document** page.

- **Description**—resource description.

- **Status**—the status of the task. Task statuses will always be *moderating.*

- **Moderating since**—time since first entered moderation workflow.

- **Workflow**—name of the moderation workflow with which the resource collection is associated.

- **Task**—the resource's current workflow task.

- **Time at this task**—time since first arrived at this task.

- **Priority**—the priority of the workflow's current task.

- **Moderation progress link**—select this link to open the **Moderation progress** page to see a diagram of the current moderation workflow.

- **(x) moderation comment(s)** —this link displays if comments have been added during previous moderation tasks. Click the link to display the comments.

- 👍 Moderate —click to moderate the resource.

See the *EQUELLA Workflow User Guide* for more information of workflows and moderation.

Sort and filter

The **Sort** and **Filter** panes on the My tasks results page display options relevant to tasks. An example of the **Sort** panel is shown in Figure 56.
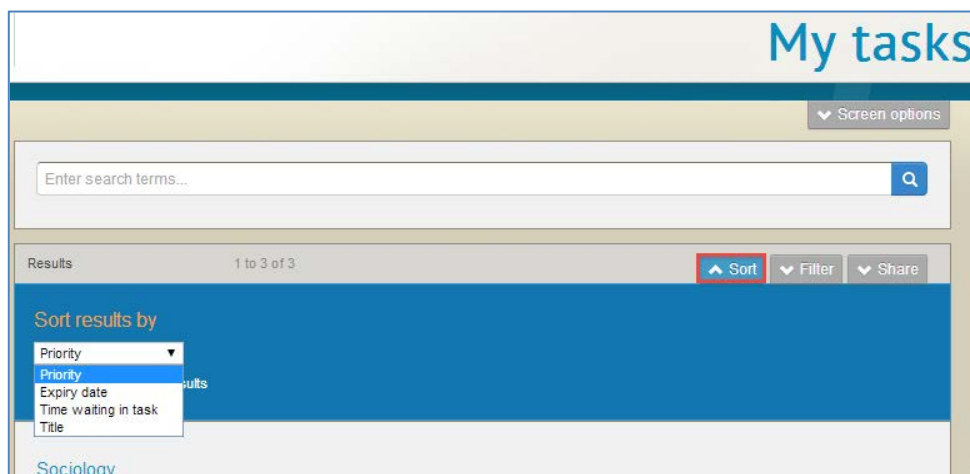
Figure 56 My tasks Sort pane

The sort options are:

- **Priority**—the priority of the resource's current workflow task.

- **Expiry date**—the date set as the last day that the task can be performed.

- **Time waiting in task**—time since resource arrived at current workflow task.

- **Title**—name of the resource.

An example of the **Filter** pane is shown in Figure 57.

Figure 57 My tasks filter pane

From the My tasks results pages, the following filter options are available:

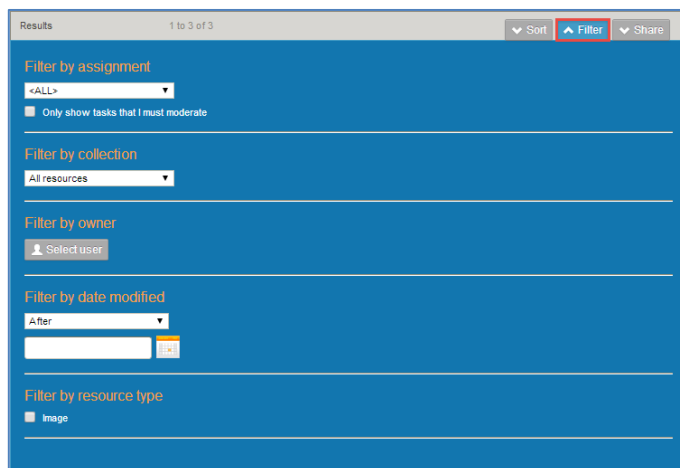- **Filter by assignment**—select a value from the drop-down list. Available options are *<All>*, *Assigned to me*, *Assigned to others* and *Unassigned*. See the *EQUELLA Workflow User Guide* for more information. Select the **Only show tasks that I must moderate** to show tasks where the current user is required to be a moderater.

- **Filter by collection**—select the required collection from the drop-down list to see only resources belonging to that collection.

- **Filter by owner**—click [Select user] to display the **Select owner to filter by** dialog and search for and select the required owner. See Filter by owner on page 30 for more information.

- **Filter by date modified**—select a qualifier from the drop-down list (**After**, **Before**, **Between** or **On**), then click the calendar field or icon to display a calendar control.

Notifications

The **Notifications** page displays items such as tasks that are overdue for moderation, rejected workflow items and notifications that resources have become available (*Live*). The **Notifications** page is accessed by selecting the **Notifications** icon at the top-right of any EQUELLA page. An example is shown in Figure 58.
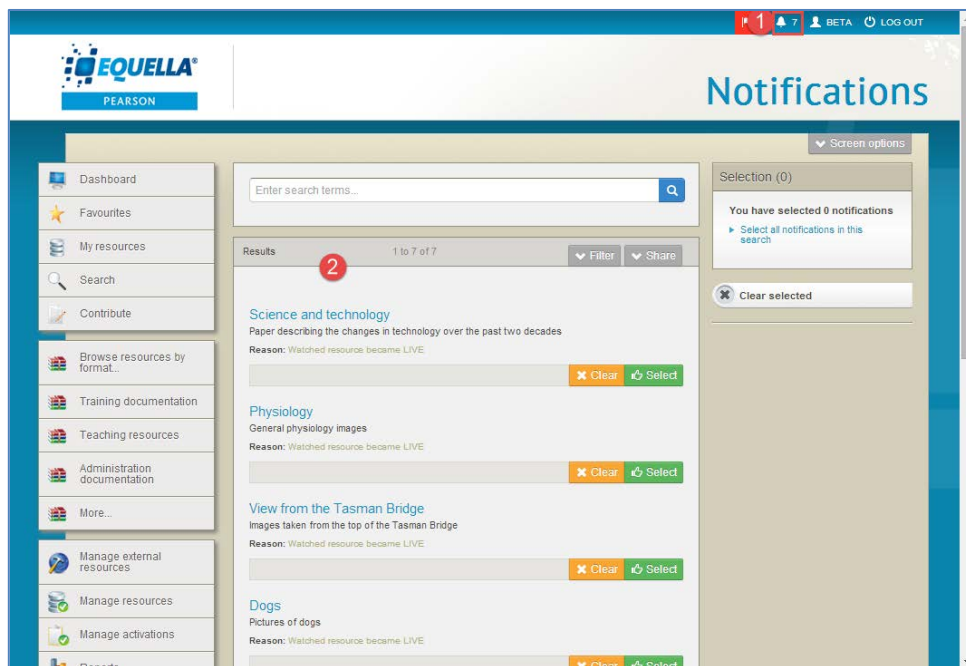
Figure 58 Notification page

A search text box is displayed at the top of the page to enter keyword searches, and each notification may display the following, depending on its type:

- **Title**—the name of the resource. Select this link to go to the **Resource summary** page.

- **Description**—resource description.

- **Reason**—why the user has received a notification. Reasons can include:

  - **Owner notified you**—notification that the resource has become available (*Live)*.

  - **Rejected**—the resource has been rejected at a workflow task.

  - **Moderation overdue**—a task assigned to the user has passed its due by date.

  - **Bad URL —** a linked URL is incorrect and doesn't work.

  - **Purchased resource updated —** resource that has been purchased using the EQUELLA Store Front function has been automatically updated from the source Store.

  - **Watched resource became LIVE** – resource that has been in moderation has now become *Live.*

  - **Item was sold** – resource has been purchased by another institution (only relevant where the EQUELLA Content Exchange is configured).

For full descriptions and more information, see the *EQUELLA Workflow User Guide.*

Filter

The **Filter** pane on the **Notifications** results page displays options relevant to notifications.

An example of the **Filter** pane is shown in Figure 59.
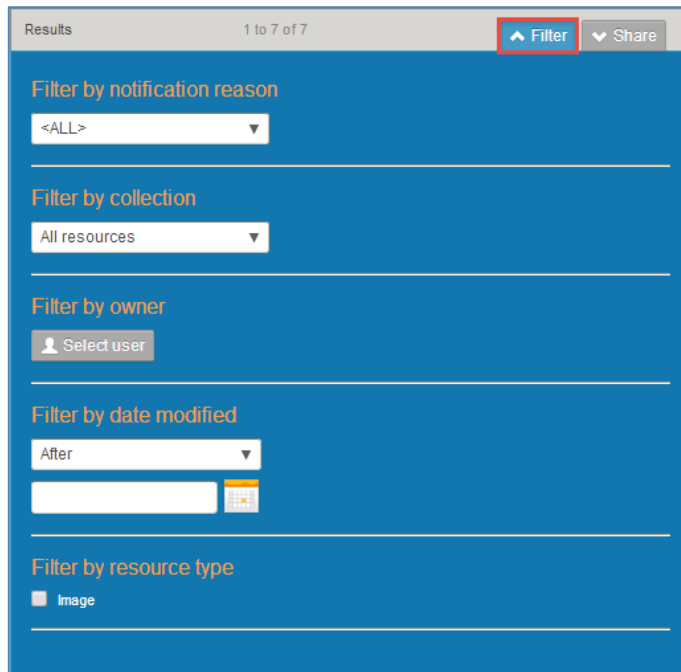

Figure 59 Notifications filter pane

From the Notifications results pages, the following filter options are available:

- **Filter by notification reason**—select a value from the drop-down list. Available options are <ALL>, Moderation overdue, Contains bad URL, Was rejected, Notified of resource becoming LIVE, Watched resource became LIVE, Updated purchases and Item sales. See the *EQUELLA Workflow User Guide* for more information.

- **Filter by collection**—select the required collection from the drop-down list to see only resources belonging to that collection.

- **Filter by owner**—click ![Select user] to display the **Select owner to filter by dialog** and search for and select the required owner. See Filter by owner on page 30 for more information.

- **Filter by date modified**—select a qualifier from the drop-down list (**After**, **Before**, **Between** or **On**), then click the calendar field or icon to display a calendar control.

Manage external resources

The Manage external resources page displays all instances of an EQUELLA resource or resource attachment that have been allocated to courses within configured LMSs. Additionally, Manage external resources also allows the user to view the uses of internal EQUELLA resources and attachments within the EQUELLA system, if *Local resources* has been configured as a connector.

The **Manage external resources** page is accessed by selecting the **Manage external resources** link from the navigation menu. An example is shown in Figure 60.
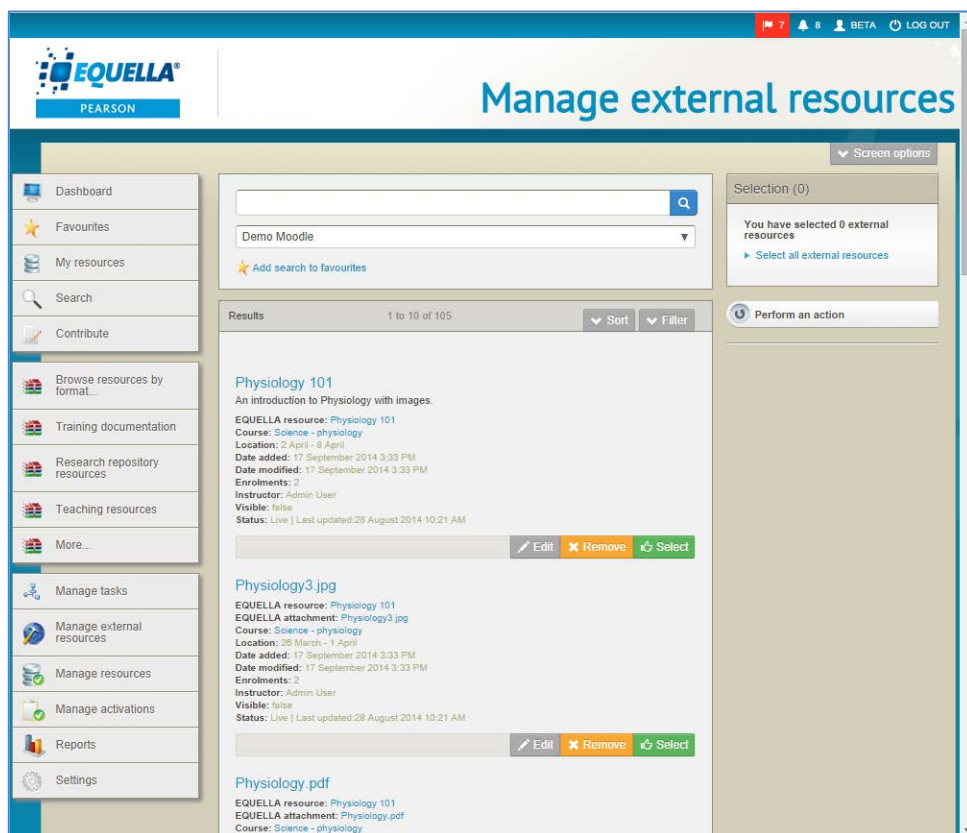
Figure 60 Manage external resources page

The **Manage external resources** page has the **Search box** at the top, where criteria are selected, and the results list displayed below.

The search box has a search text box to enter keyword searches, and a **Within** drop-down list. (*NOTE: The Within drop-down list only displays if there are multiple external connectors configured on the system.*) A value must be selected from the **Within** drop-down list before results are displayed. An example is shown in Figure 61.
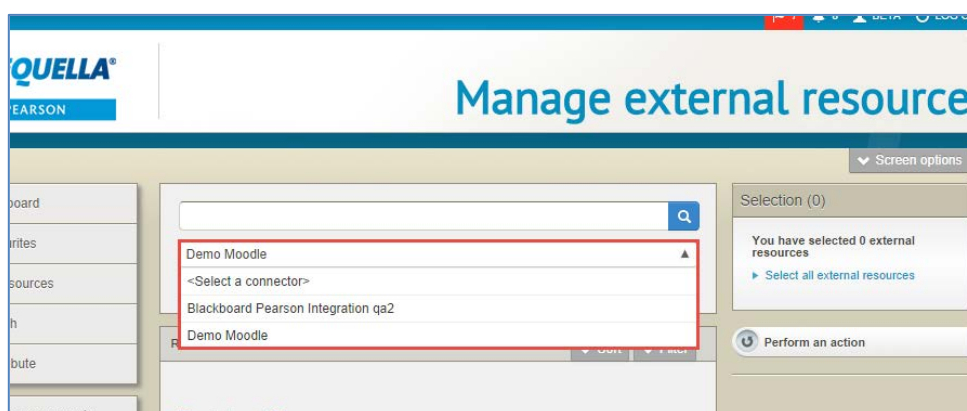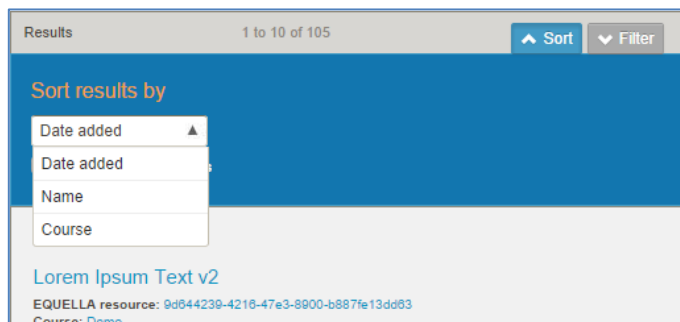

Figure 61 Manage external resources Within drop-down list

Each LMS connector can display different information about its resources. See the *EQUELLA Push to LMS Guide* for detailed information on results displayed.

Similarly, the sort and filter options within the Manage external resources results pages can be slightly different depending on the LMS connector selected. An example of the Moodle sort and filter options are shown below. See the *EQUELLA Push to LMS Guide* for full details.

Sort and filter

The **Sort** and **Filter** tabs on the Manage external resources results page (Moodle) display options relevant to Moodle resources. An example of the **Sort** pane is shown in Figure 62.
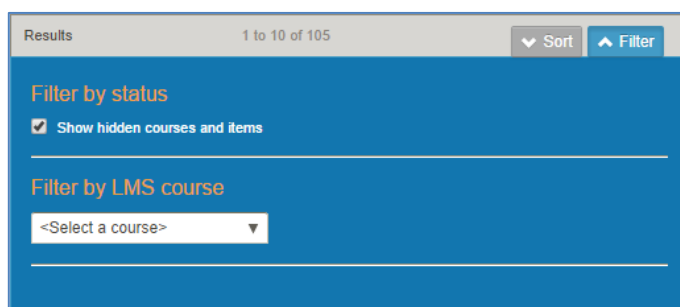

Figure 62 Manage external resources sort pane

The sort options are:

- **Date added—**sorts the results by the date the resource was added to its Moodle location.

- **Name—**sorts the results by the Moodle name of the resource.

- **Course—**sorts the results by Moodle course name.

- **Reverse order of results—**select to change the order of the results.

An example of the **Filter** pane is shown in Figure 63.

Figure 63 Manage external resources filter pane—Moodle

From the Manage external resources results page (Moodle), the following filter options are available:

- **Filter by status—**select this option to include results from courses set as 'hidden' in Moodle.

- **Filter by LMS course**—select a Moodle course from the drop-down list to show only results from the selected course.

Manage tasks

The **Manage tasks** page displays all workflow tasks. Content and system administrators would typically be granted privileges to access this function to view moderation progress. The **Manage tasks** page is accessed by selecting the **Manage tasks** link from the navigation menu. An example is shown in Figure 64.
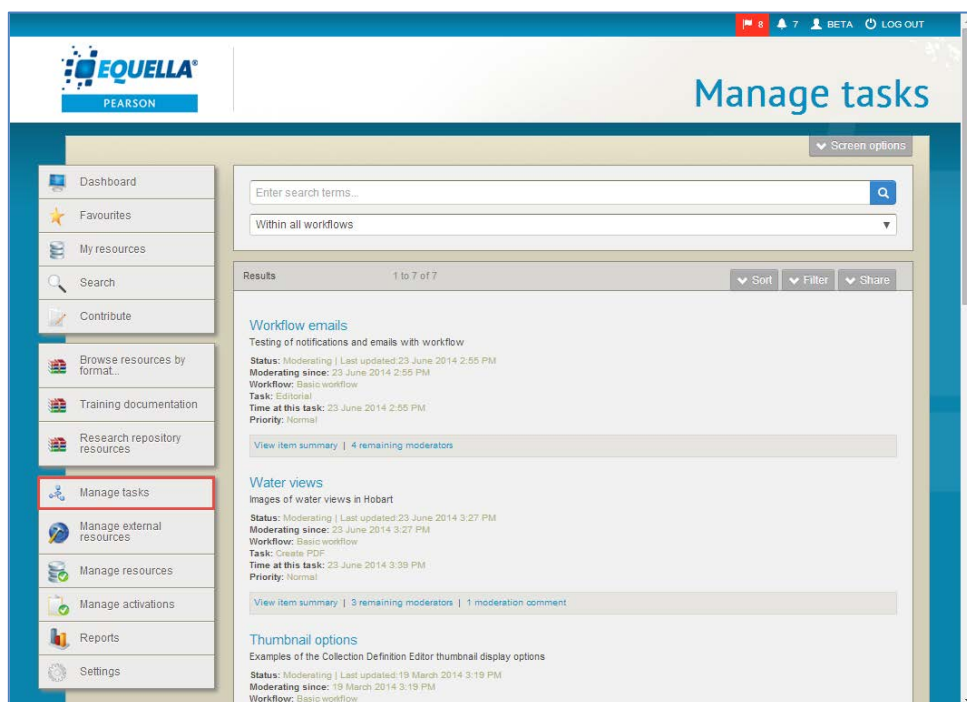

Figure 64 Manage tasks page

The **Manage tasks** page has the **Search box** at the top, where criteria are selected, and the results list displayed below.

The search box has a search text box to enter keyword searches, and a **Within** drop-down list. Searching can be refined by selecting *All workflows* or a specific workflow (e.g. *Document Review*) from the **Within** drop-down list. An example is shown in Figure 65.
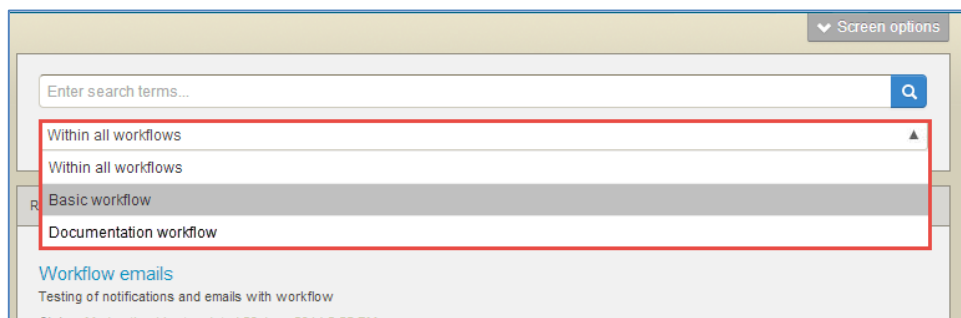

Figure 65 Manage tasks Within drop-down list

The tasks results screen lists the matching tasks, and displays the following:

- **Title—**the name of the resource. Select this link to go to the **Moderation progress** page.

- **Description—**resource description.

- **Status—**will always be *Moderating* or *Review.*

- **Moderating since—**time since first entered moderation workflow.

- **Workflow—**name of the moderation workflow with which the resource collection is associated.

- **Task—**the resource's current workflow task.

- **Time at this task—**time since first arrived at this task.

- **Priority—**the priority of the workflow's current task.

- **View item summary—**select to go to the resource summary page.

- **(x) remaining moderator—**select to view the **Moderators** dialog, which lists the names of any remaining moderators.

- **(x) moderation comment—**select to view the **Moderation comments** dialog, which displays recorded moderation comments.

Sort and filter

The **Sort** and **Filter** panes on the Manage tasks results page display options relevant to managing tasks. An example of the **Sort** pane is shown in Figure 66.
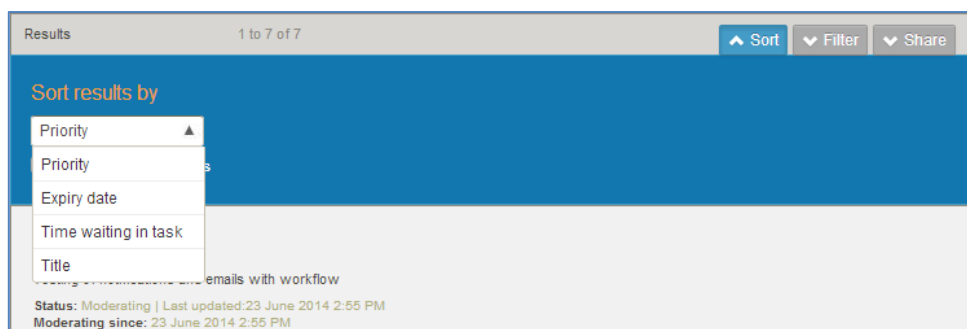

Figure 66 Manage tasks sort pane

The sort options are:

- **Priority—**the priority of the resource's current workflow task.

- **Expiry date—**the date set as the last day that the task can be performed.

- **Time waiting in task—**time since the resource arrived at current workflow task.

- **Title—**name of the resource.

- **Reverse order of results—**check to reverse the order results are displayed.

An example of the **Filter** pane is shown in Figure 67.
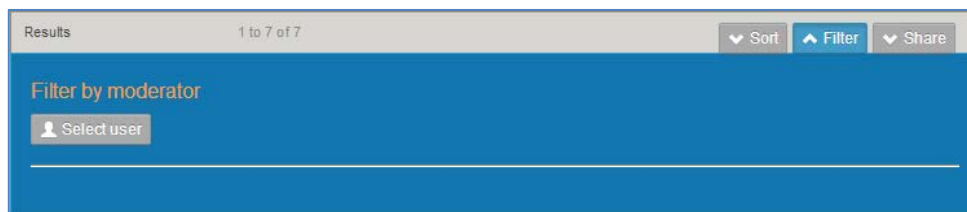
Figure 67 Manage tasks filter pane

From the Manage tasks results pages, the following filter option is available:

- **Filter by moderator**—click [Select user] to display the **Choose moderator to filter by** and search for and select the required user. See Filter by owner on page 30 for more information.

Manage resources

The **Manage resources** page displays all resources. . Content and system administrators would typically be granted privileges to access this function to manage resources. The **Manage resources** page is accessed by selecting the **Manage activations** link from the navigation menu. An example is shown in Figure 68.
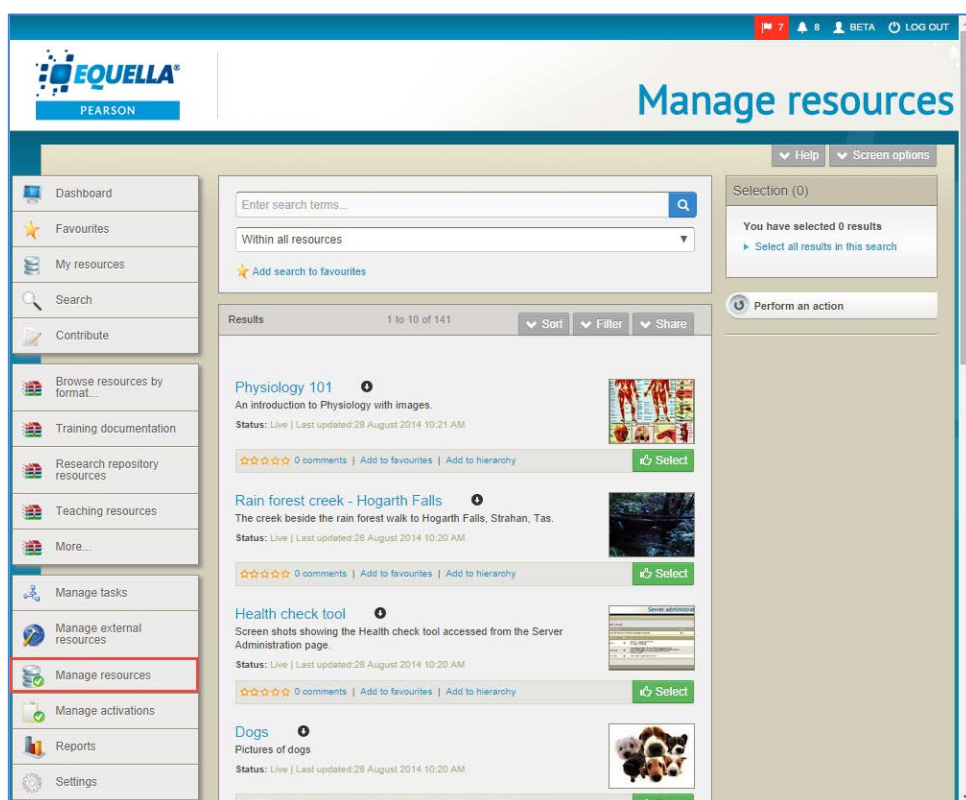
Figure 68 Manage resources page

The Manage resources results page lists resources, and displays the following:

- **Title—**the name of the resource. Select this link to go to the **Resource summary** page.
- **Description—**resource description.

- **Status—** *Draft*, *Live*, *Rejected*, *Moderating*, *Archived*, *Suspended*, *Deleted* or *Review.*
- **Last updated** – Time since last updated or date last updated, depending on date format settings.

Filter

The Manage resources filter pane displays options relevant to resources.

An example of the **Filter** pane is shown in Figure 69.
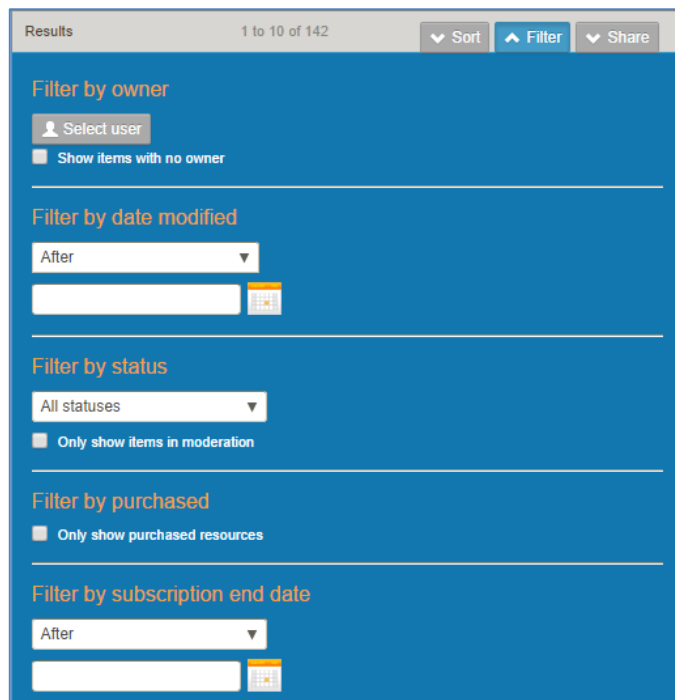
Figure 69 Manage resources filter pane

From the Manage resources results pages, the following additional filter options are available:

- **Filter by owner** – click [Select user] to display the **Select owner to filter by** and search for and select the required user. See Filter by owner on page 30 for more information. Select the **Show items with no owner** checkbox to display resources where no owner is recorded.

- **Filter by status** – select from *All statuses, Draft, Live, Rejected, Moderating, Archived, Suspended, Deleted* or *Review.* Select the **Only show items in moderation** checkbox to display the resources that are currently in moderation in a workflow.

- **Filter by purchased** – select the **Only show purchased resources** to view resources that have been purchased from other institutions. This is only relevant when your institution has the *EQUELLA Content Exchange* in use.

- **Filter by subscription end date** – Select a condition from the drop-down (e.g. *on)* then select a date to display the matching subscription resources. This is only relevant when your institution has the *EQUELLA Content Exchange* in use.

Manage activations

The **Manage activations** page displays copyright activations. Content and system administrators would typically be granted privileges to access this function to manage activations. The **Manage activations** page is accessed by selecting the **Manage activations** link from the navigation menu. An example is shown in Figure 70.
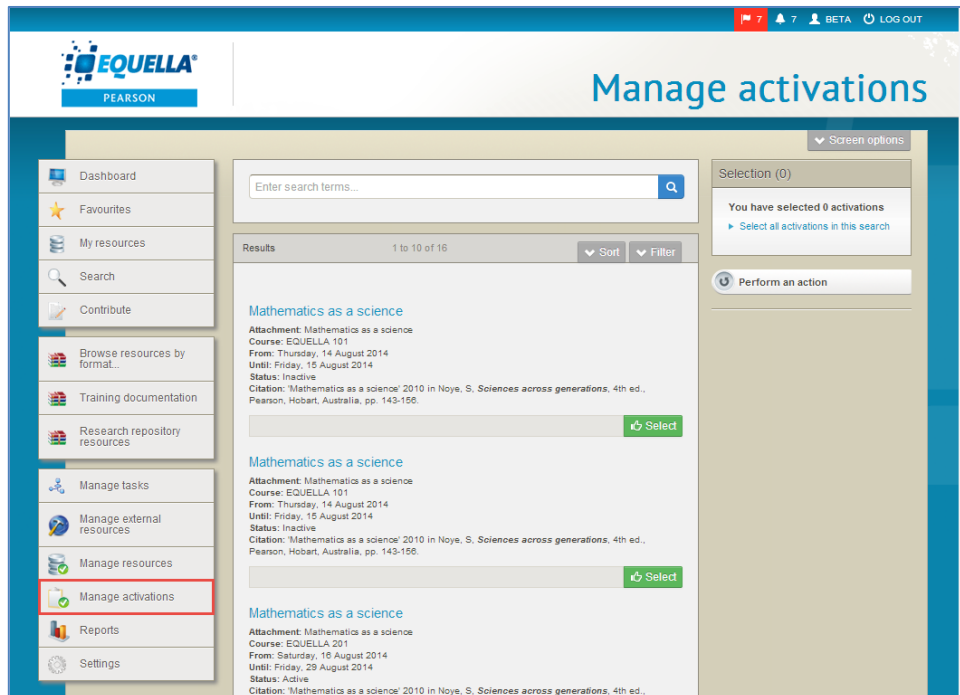
Figure 70 Manage activations page

The Manage activations results screen lists activations, and displays the following:

- **Title**—the name of the resource. Select this link to go to the **Resource summary** page.

- **Description**—resource description.

- **Attachment**—name of attachment (extract).

- **Course**—the course the resource is associated with.

- **From**—the date the resource is available from.

- **Until**—the date the resource is available to.

- **Status**—the status of the resource (e.g. *Live, Moderating etc.*).

- **Citation** – displays the citation.

See *EQUELLA Copyright Contribution Guides* (CAL and CLA) for more information.

Filter

The Manage activations filter pane displays options relevant to activations.

An example of the **Filter** pane is shown in Figure 71.

Figure 71 Manage activations filter pane

From the Manage activations results pages, the following filter options are available:

- **Filter by activation status** – select from *Active*, *Pending* or *Inactive*

- **Filter by course**—click [Select course] to display the **Select a course** dialog. Enter the name or part name of the course and click [🔍 Search]. An example is shown in Figure 72.

Figure 72 Select a course dialog

Select the required course from the results, then click ✔ OK. Click Change course to choose a different course, or ✖ remove to clear the filter.

- **Filter by owner**—click 👤 Select user to display the **Select owner to filter by dialog** and search for and select the required owner. See Filter by owner on page 30 for more information.

- **Activation range**—includes *Start date between x and y, End date between x and y* and *Activated between x and y,* where x and y are dates picked from calendar controls.

Google Books search

Google Books references can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.
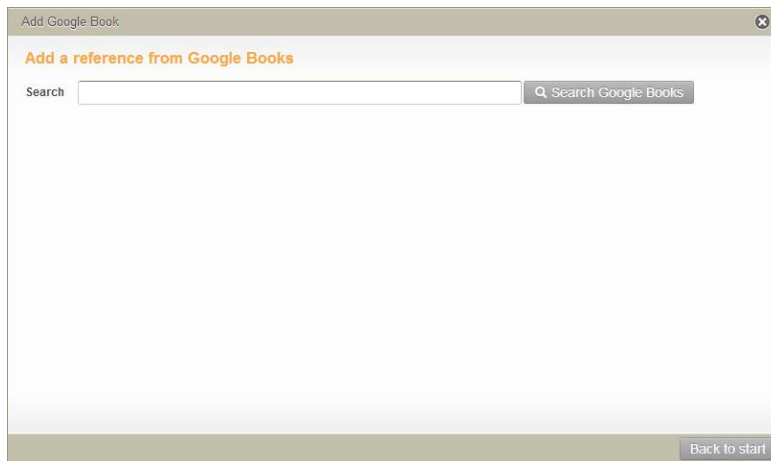
To add a Google Book reference

1. Select **Google Books** from the contribution attachments control, then click Next. An example is shown in Figure 73.
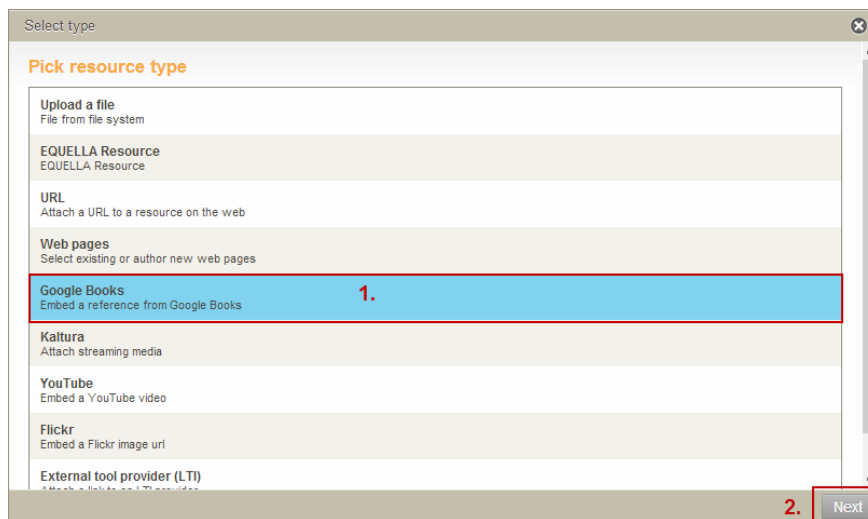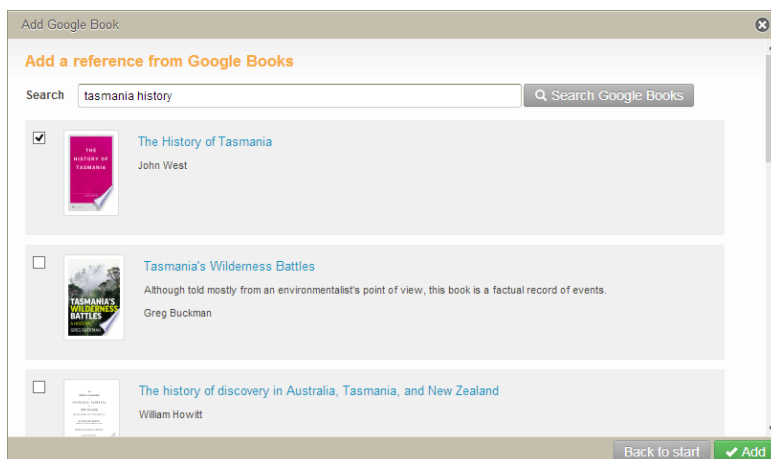

Figure 73 Contribution attachment control—Google Books

The **Add Google Book** page displays, as shown in Figure 74.

Figure 74 Add Google Book

2. Enter keywords into the search text box then click [🔍 Search Google Books]. The more keywords entered, the more relevant the search results will be. For example, *tasmania* will return all results containing the word 'tasmania', whereas *tasmania* and *history* will return results containing both words first, with the most relevant at the top of the results list. Results containing only one word match display underneath. An example is shown in Figure 75.

**Figure 75 Add Google Book results page**

3. Select the required references then click [✔ Add].

iTunes U search

iTunes U[TM] tracks can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.
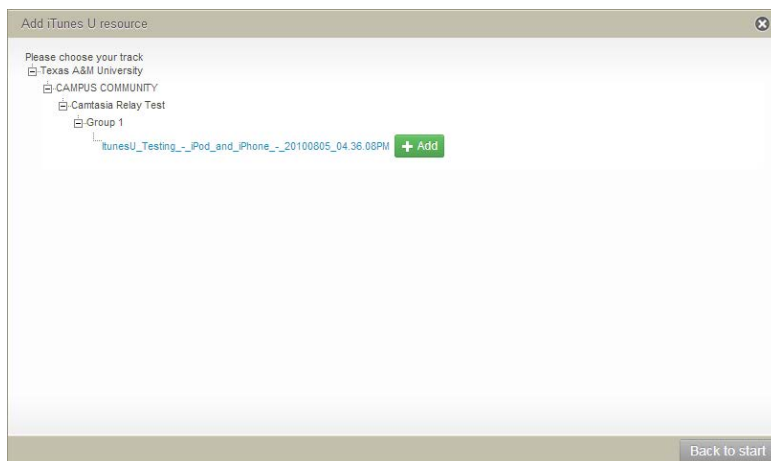
To add an iTunes U track

1. Select **iTunes U** from the contribution attachments control, then click [Next]. An example is shown in Figure 76.
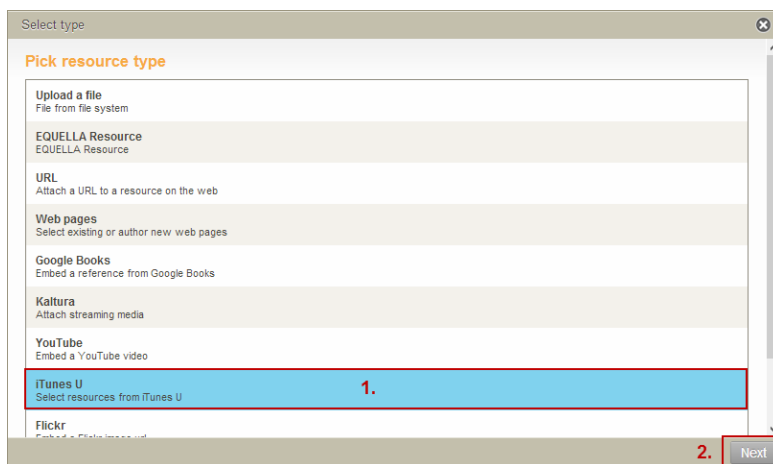
Figure 76 Contribution attachment control—iTunes U

The **Add iTunes U resource** page displays. An example is shown in Figure 77.

Figure 77 iTunes U resource page

2. Click **+** to drill down to the required track, then click ✔ Add .

YouTube search

YouTube video links can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.

To add an YouTube video link

1. Select **YouTube** from the contribution attachments control, then click Next . An example is shown in Figure 78.

Figure 78 Contribution attachments control—YouTube

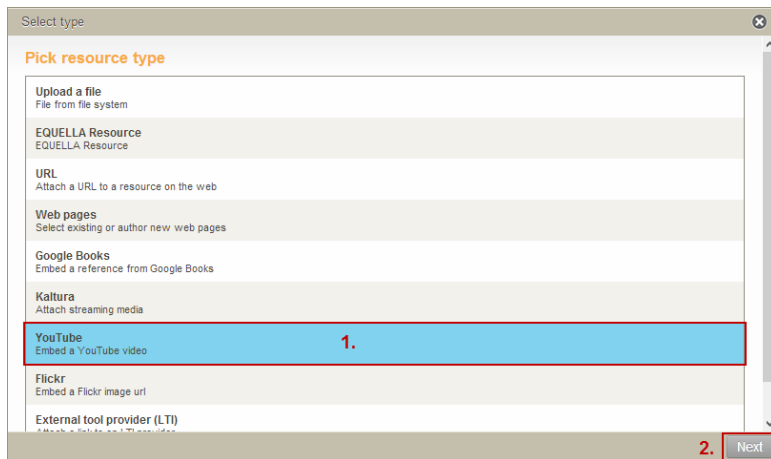The **Add YouTube** page displays. An example is shown in Figure 79.
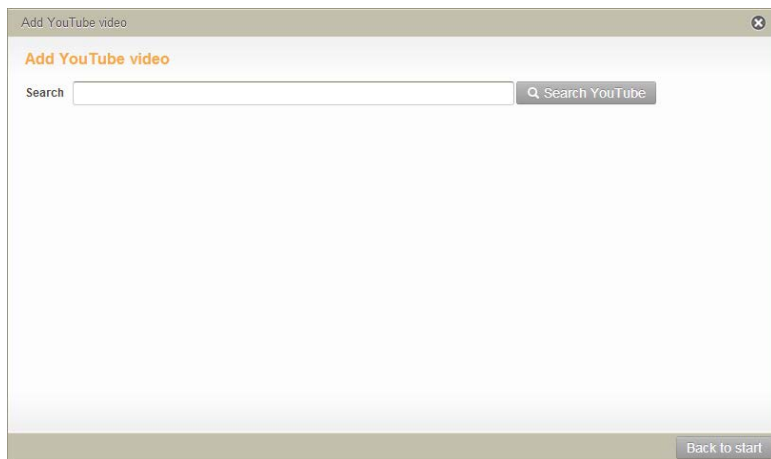
Figure 79 Add YouTube video page

2. Enter keywords into the search text box then click [Search YouTube]. The more keywords entered, the more relevant the search results will be. For example, *tasmania* will return all results containing the word 'tasmania', whereas *tasmania* and *history* will return results containing both words first, with the most relevant at the top of the results list. Results containing only one word match display underneath. An example is shown in Figure 80.

Figure 80 Add YouTube video results page

3. Select the required videos then click [✔ Add].

Flickr search

Flickr image links can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.

To add a Flickr image link

1. Select **Flickr** from the contribution attachments control, then click [Next]. An example is shown in Figure 81.
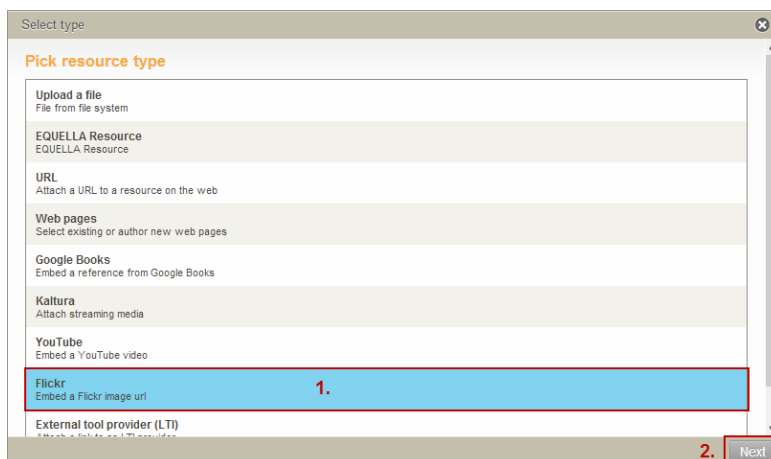
Figure 81 Contribution attachments control—Flickr
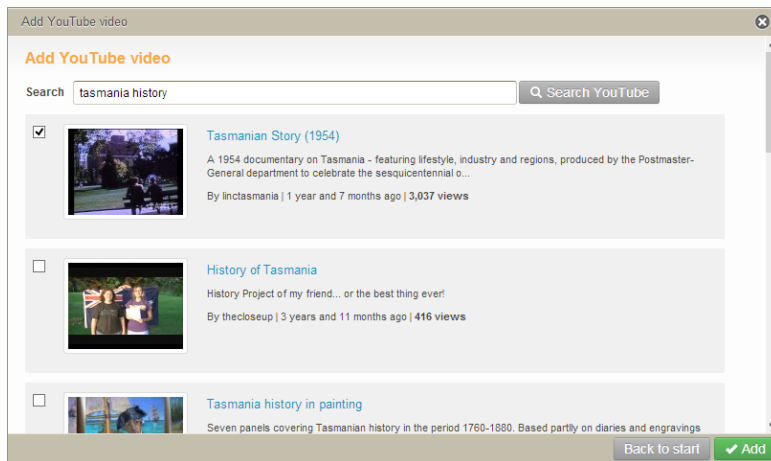
The **Add Flickr image** page displays, as shown in Figure 82.
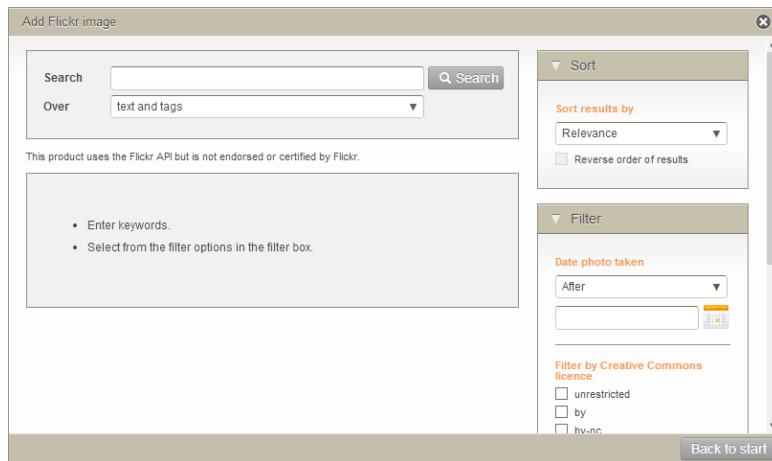
Figure 82 Add Flickr image page

The **Add Flickr image** page has a search box with a **Search** text box for entering keywords and an **Over** drop-down list with a default value of **text and tags.** The Over values are:

- **text and tags**—perform a freetext search matching values in a photo's title, description or tags.

- **any tags**—search tags for ANY keyword match (using an OR combination).

- **all tags**—search tags for an ALL keyword match (using an AND combination).

2. Enter keywords into the search text box (e.g. *tasmania*), select a value from the Over drop-down list (e.g. *text and tags*) then click [Search]. The **Add Flickr image** results page displays. An example is shown in Figure 83.
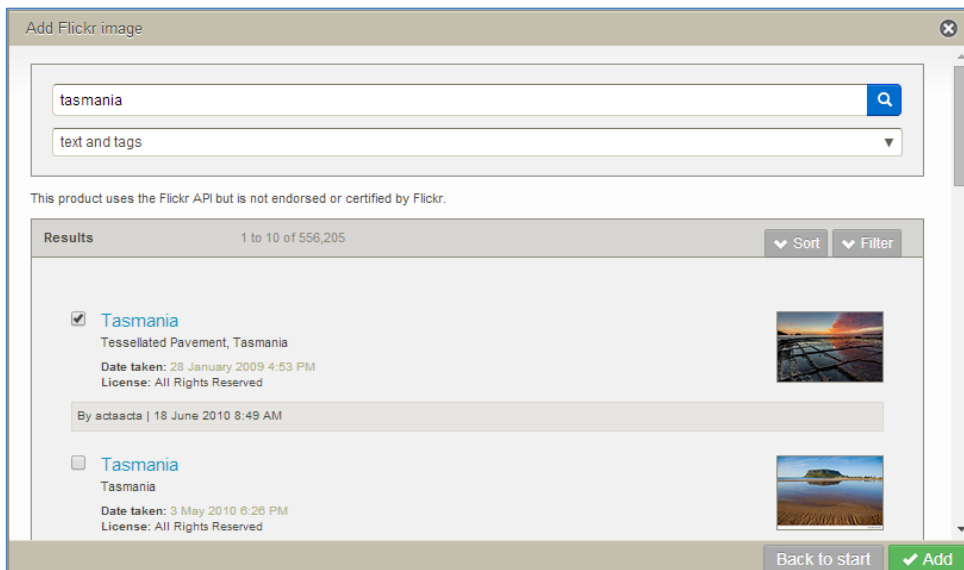

Figure 83 Add Flickr image results page

The **Add Flickr image results page** displays Flickr image thumbnails, and in addition to *title* and *description*, may display the following:

- **Full image size**—shows the full image size dimensions

- ▪ **Date taken**
- ▪ **License**—the type of license associated with the image

3. Select the required videos then click ✔ Add.

Sort and filter

The **Sort** and **Filter** panes on the Add Flickr image results page displays options relevant to Flickr images. An example of the **Sort** pane is shown in Figure 84.

Figure 84 Add Flickr image sort pane

The sort options are:

- **Relevance**—relevance to keywords entered
- **Interestingness** (a Flickr term) —a term of measurement from Flickr
- **Date taken**
- **Date posted**

An example of the **Filter** pane is shown in Figure 85.
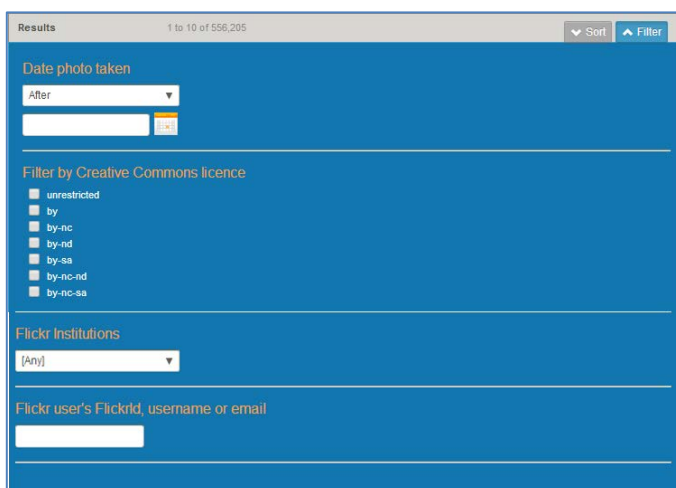
Figure 85 Flickr filter pane

From the Add Flickr image results pages, the following filter options are available:

- **Date photo taken**—select a value from the drop-down list. Available options are *After*, *Before*, *Between* and *On*. Select the date or dates from the calendar controls.

- **Filter by Creative Commons licence**—select the type of licenses required.

- **Flickr Institutions**—a 'Creative Commons Institution' can be selected from the drop-down list. This list is a subset of all the Creative Commons Institutions available in Flickr. Creative Commons Institutions contain images with *unrestricted* licences, so selecting **unrestricted** in the **Filter by Creative Commons licence** field effectively returns images from all Flickr Creative Commons Institutions.

- **Flickr user's FlickrId, username or email**—enter to search for images within the user's Flickr collection.

Kaltura search

Kaltura streaming media links can be added to resources during contribution using the attachments control. See *EQUELLA Contribution User Guide* for more information.
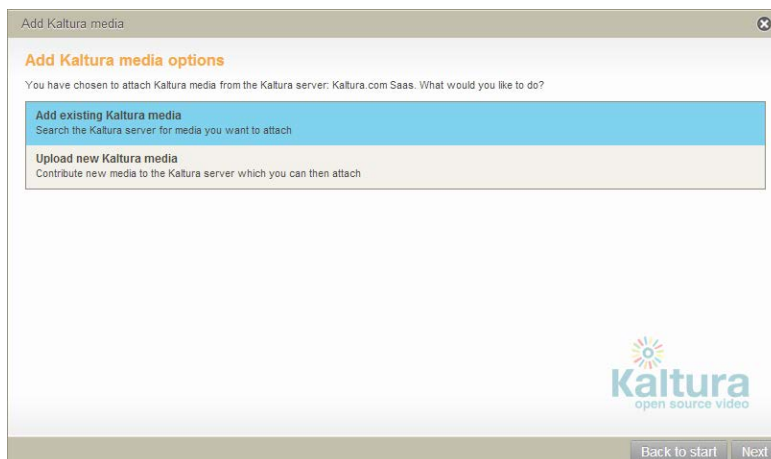
To add a Kaltura video link

1. Select **Kaltura** from the contribution attachments control, then click Next . An example is shown in Figure 86.
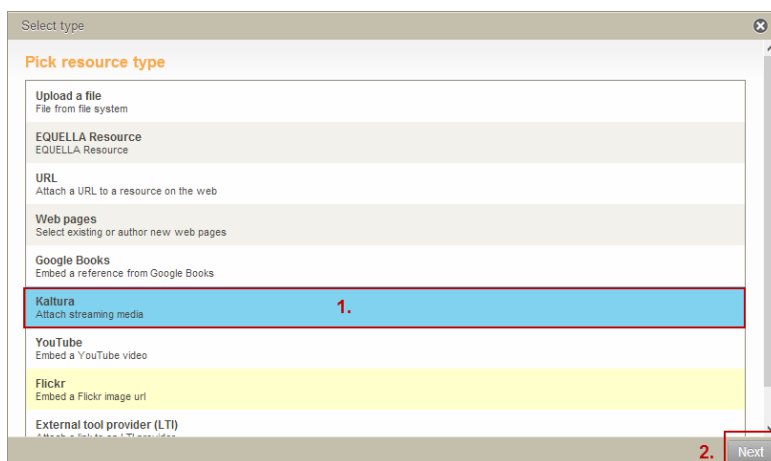
**Figure 86 Contribution attachments control—Kaltura**

The **Add Kaltura media** page displays, as shown in Figure 87.

Figure 87 Add Kaltura media page

The *Add Kaltura media* page provides the user with two options, **Add existing Kaltura media** and **Upload new Kaltura media** (see the *EQUELLA Contribution User Guide* for more information on the *Upload new Kaltura media* function).

2. Select the **Add existing Kaltura media** option then click Next to display the **Add Kaltura media** search page, as shown in Figure 88.
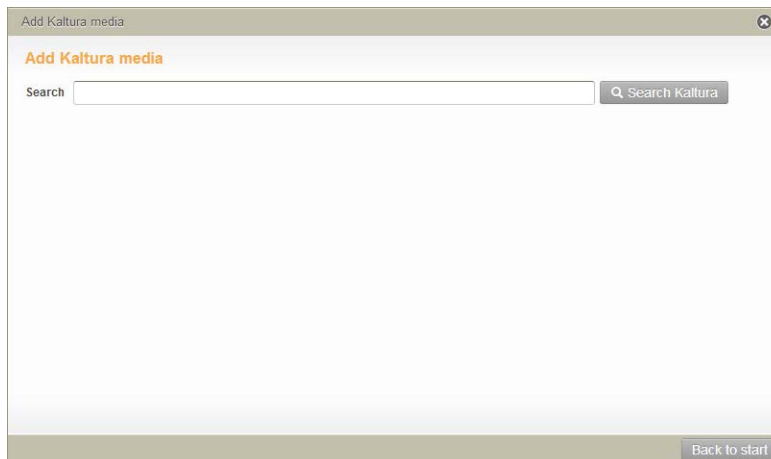
Figure 88 Add Kaltura media search page

(*NOTE: Kaltura does not allow the use of wildcards. Additionally, a full word match must be made to return results.*)

3. Enter search criteria (e.g. *wildlife*) then click Q Search Kaltura . The search results display. An example is shown in Figure 89.
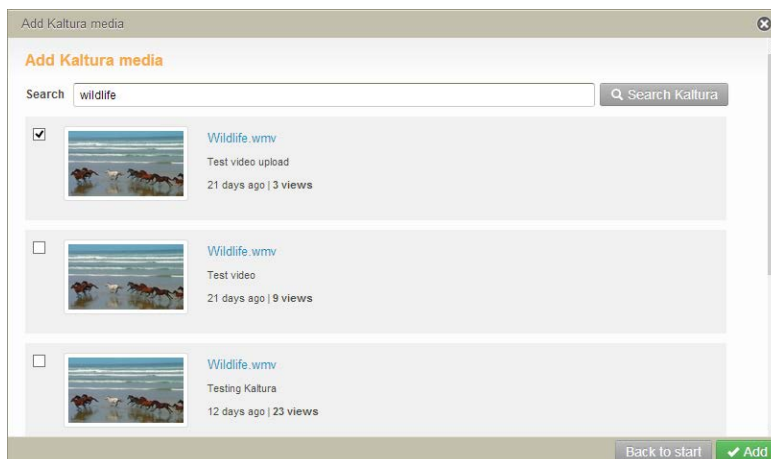
Figure 89 Add Kaltura media search results

4. Select the required resources then click ✔ Add .

Browsing

In addition to searching, the EQUELLA Digital Repository allows the user to browse hierarchies of logically grouped resources.

Hierarchical browsing allows users to discover resources placed within the digital repository based upon category. Users can 'drill down' into topics and their subfolders and search within the results. EQUELLA can be configured to provide a count of subtopics and results and allow contributors to add their most important resources to a hierarchy topic as key resources. See *EQUELLA Hierarchy Configuration Guide* for more information.

Hierarchy topics are accessed from the EQUELLA Dashboard page via the Browse portlet or from the hierarchy topic links displayed on the navigation menu.

Browsing using hierarchy topic links

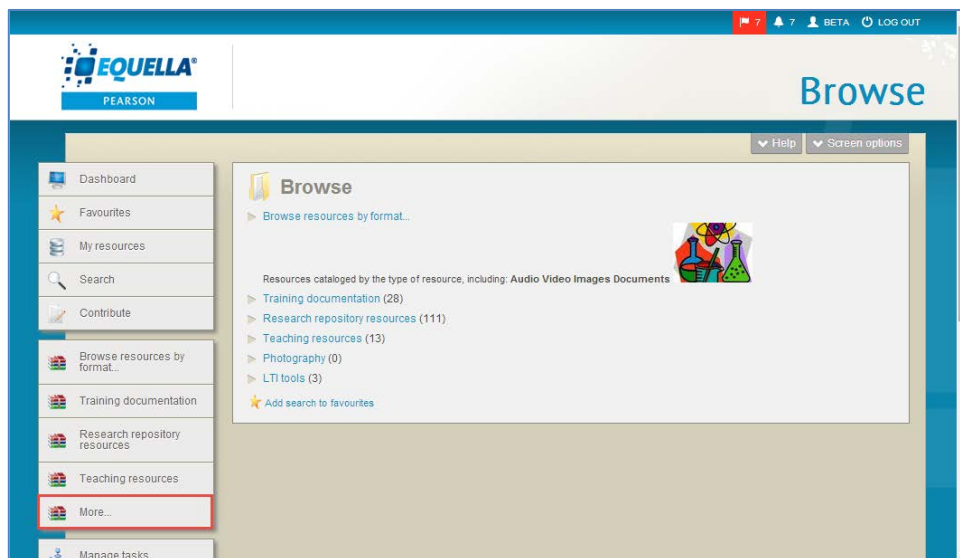Hierarchy topic links display in a group on the left-hand navigation menu. Select a link to display subtopics and results.

When six or more topics are added, the first four plus a **More...** link display. An example is shown in Figure 90.
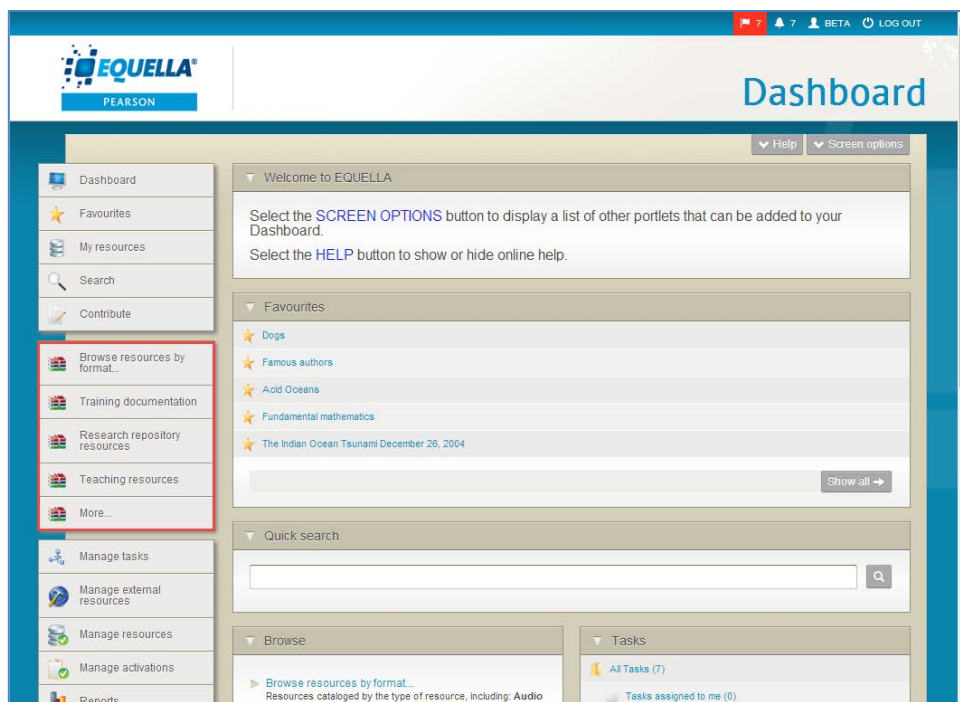
Figure 90 Hierarchy topic links

Selecting the **More...** link displays the **Browse** page with a list of all hierarchy topics, as shown in Figure 91.

Figure 91 Browse page from More... link

Select a topic to display subtopics and results.

Browsing using the Browse portlet

The EQUELLA Dashboard page can display multiple portlets, including Browse, Favourites, Formatted text, My resources, Quick search, RSS or Atom feed, Recent contributions, Scripted, Task statistics, Tasks and Web page, depending on user privileges.

These portlets are configured by clicking ⌄ Screen options from EQUELLA Dashboard then selecting the required portlet.

To add a Browse portlet to the Dashboard

1. Click ⌄ Screen options from the top right-hand corner of the Dashboard page. An example is shown in Figure 92.
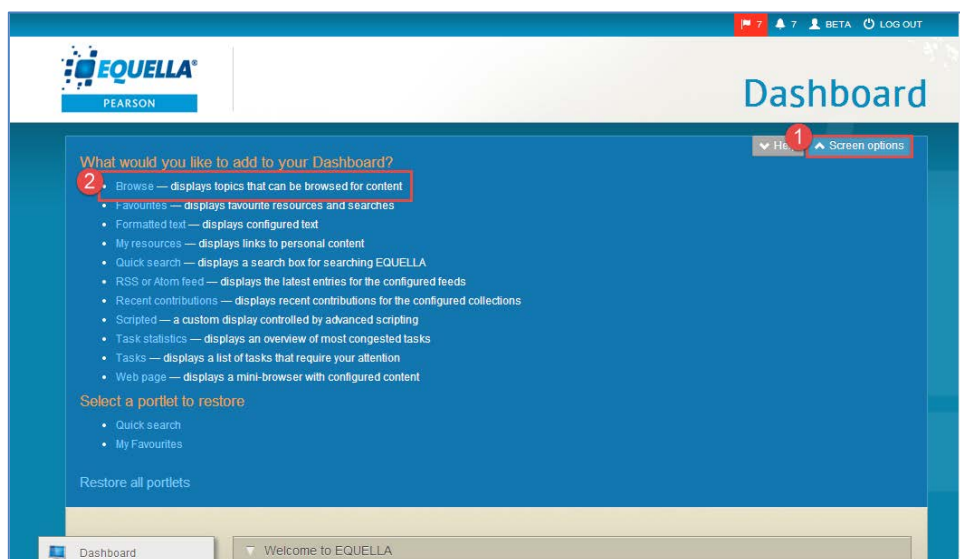
Figure 92 Accessing screen options

A list of available portlets displays. Click the **Browse** link to display the **Create a new Browse portlet** page, as shown in Figure 93.

Figure 93 Create a new Browse portlet page

2. The default Title is **Browse** but may be changed, if required.

3. Click ✔Save . The **Browse** portlet now displays on the Dashboard page, as shown in Figure 94.

Figure 94 Dashboard with Browse portlet

Select a topic to display subtopics and results.

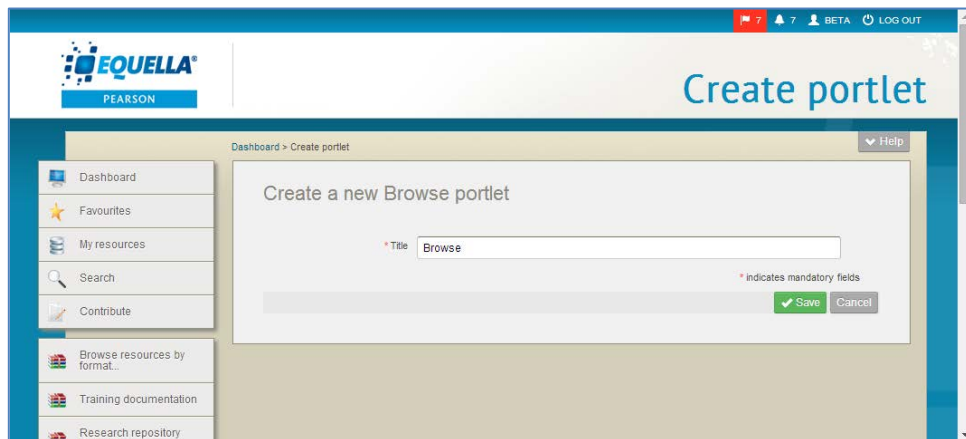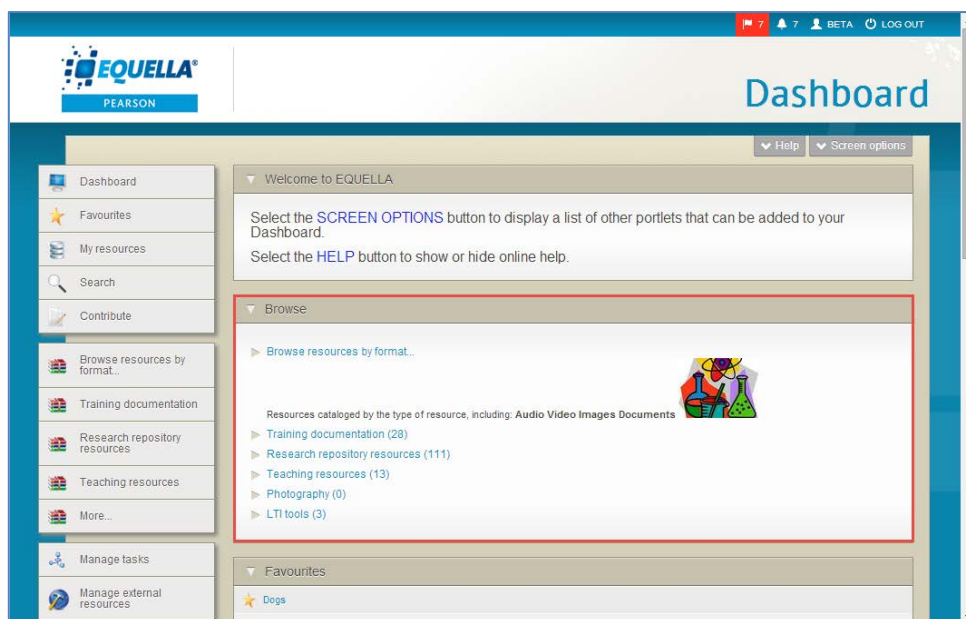## *Displaying subtopics and results*

Once a topic is selected, any subtopics are displayed. Results may also display at this point, depending on how the hierarchy has been configured. Some hierarchies may require a subtopic to be selected before any results display.

An example of a hierarchy where only subtopics display is shown in Figure 95.
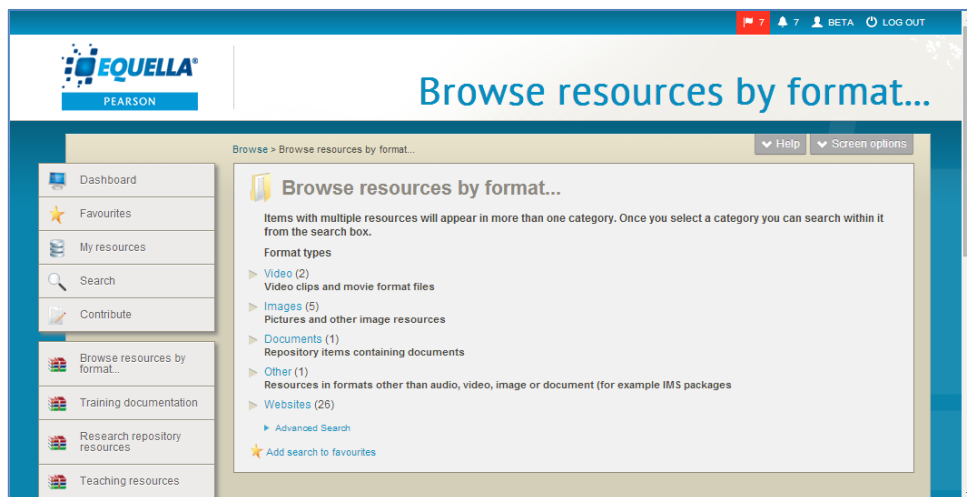
Figure 95 Hierarchy with subtopics and no results

Select a subtopic to display results.

An example of a hierarchy where both subtopics and results display is shown in Figure 96.
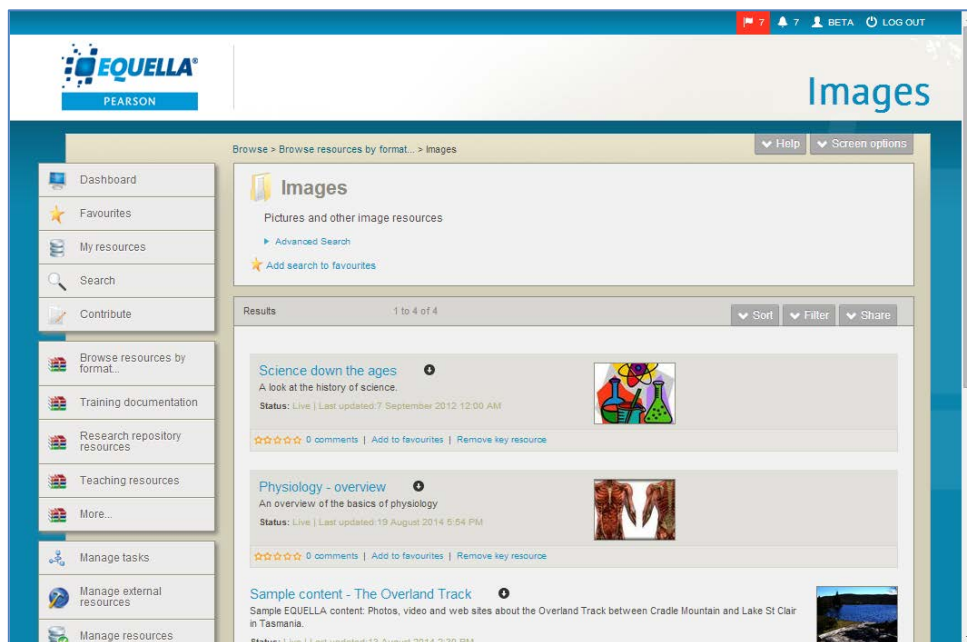
Figure 96 Hierarchy with subtopic and results

Click **Add search to favourites** to save the current search to Favourites. (See Add search to favourites on page 27 for more information.)

Open the **Share** tab to display the **Share search query** pane and select the share method. (See Share results on page 32 for more information.)

The **Sort** and **Filter** panes can be used to further 'drill down'.

Viewing key resources

Key resources are important resources added to a hierarchy, and are always highlighted and displayed at the top of hierarchy results. An example is shown in Figure 97.
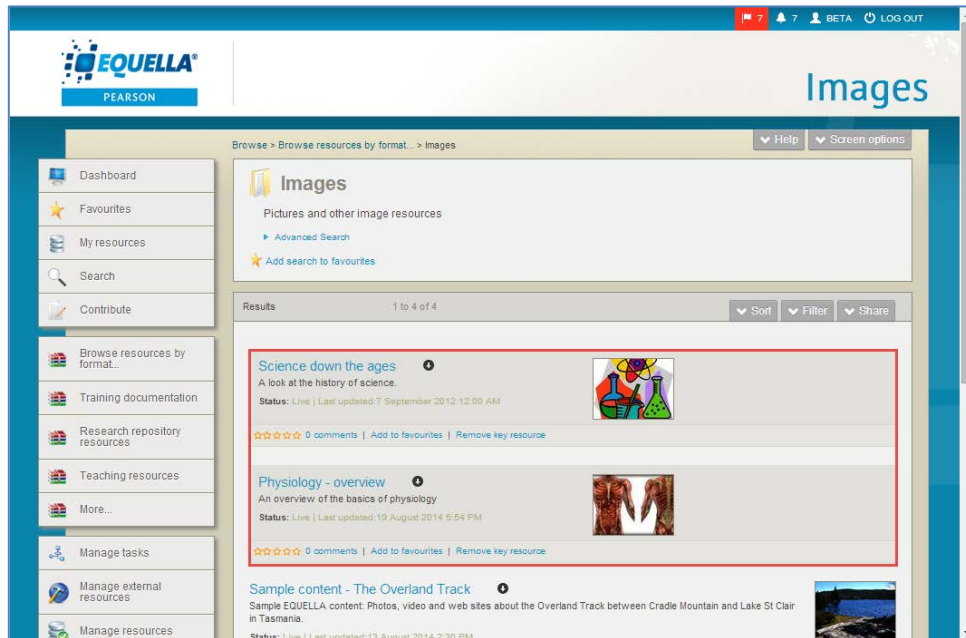

Figure 97 Viewing key resources

See the *EQUELLA Hierarchy Configuration Guide* for more information about key resources and hierarchies.

Search settings

The **Searching and content indexing page** is where default searching options are set, additional search filters can be added or edited, searching boosting is configured and content indexing options are set.

A user with administrator privileges would generally have access to these settings.

To access Searching and content indexing settings

1. From the navigation menu, select **Settings, Searching and content indexing.** The **Searching and content indexing** page display. An example is shown in Figure 98.
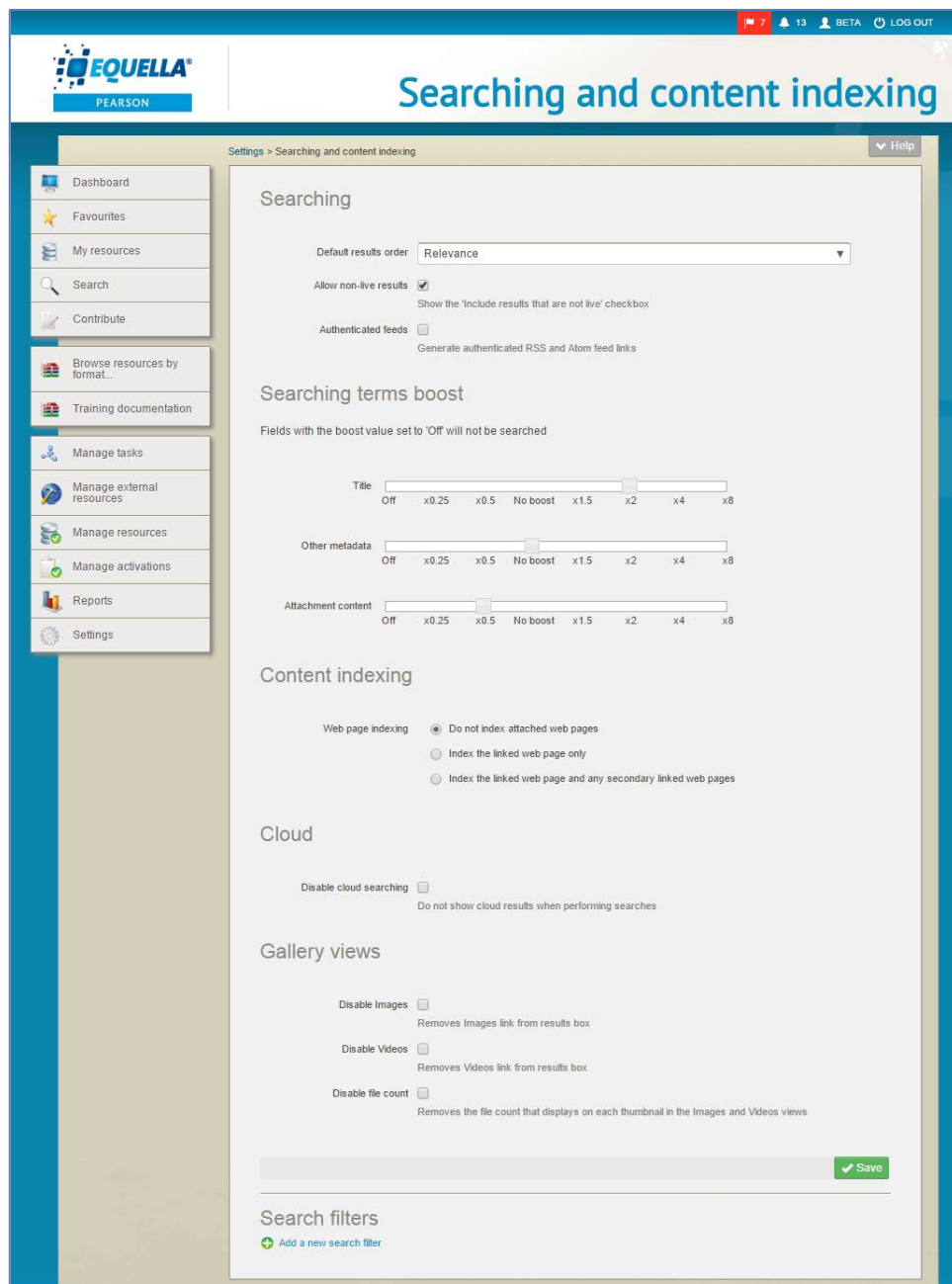
Figure 98 Searching and content indexing page

Searching options

To configure Searching options

1. From the **Default results order** drop-down list, select the required default order resources will display on search results pages (*Relevance, Date last modified, Title* or *User rating)*.

2. Select the **Allow non-live results** checkbox to show the '*Include results that are not live'* checkbox in the Search page *Screen options.* An example is shown in Figure 99.
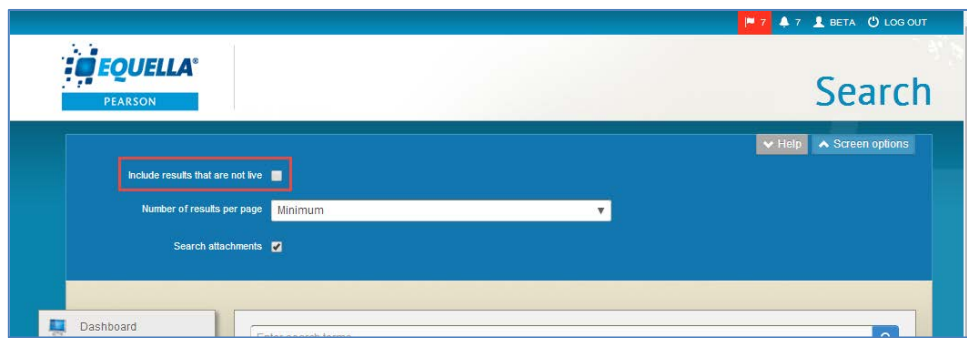
Figure 99 Search page screen options

3. Check the **Authenticated feeds** checkbox to default to authenticated RSS or Atom feeds. If this box is not checked, users can only see public items in their feed, rather than all the results generated.

4. Click .

Searching terms boost

When the results sort order is set to *Relevance*, and search terms are entered, the results display a relevance score. (See Relevance scores and searching attachments on page 12 for further information.)

When calculating the relevance score in EQUELLA versions prior to 6.2, the item title was worth 1.5 times as much as content found anywhere else (metadata plus attachments). Attachment content and metadata were grouped into the same field and were worth the same.

From EQUELLA 6.2, these weights are adjustable, and in addition the attachment content is a separately configurable weight. That is, title, metadata and attachment content can all be adjusted from being not searched at all to being 8 times more relevant.

NOTE: Different indexed metadata nodes cannot be made more or less relevant; they are all worth the same.

To configure Searching terms boost

1. Drag the boost variables to the required values. An example is shown in Figure 100.
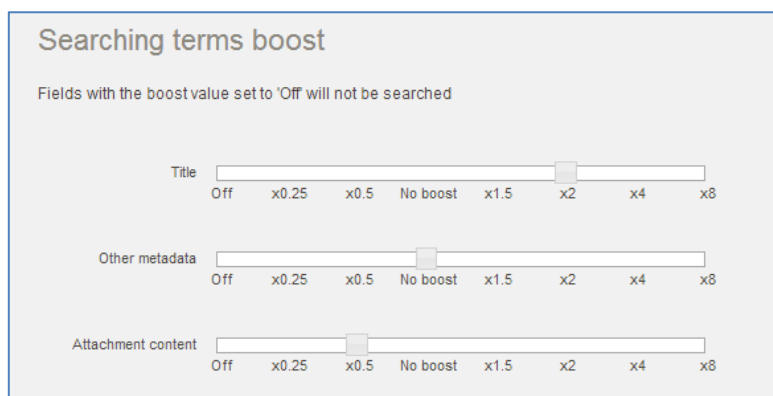
Figure 100 Searching terms boost

NOTE: Setting a boost value to **Off** *will prevent the system from searching in that field. (e.g. If Attachment content is set to* Off*, the system will not look at attachment content for matches to the search criteria.)*

2. Click ✔Save.

Content indexing options

To configure Content indexing options

1. Select the required option from:

    ▪   **Do not index attached web pages**—select this option if it is not required for searches to return matching results on linked web pages.

    ▪   **Index the linked web page only**—select this option to index the web page of the linked URL, but no further linked web page levels. This means that searches will return matching results from the web page content.

    ▪   **Index the linked web page and any secondary linked web pages**—select this option to index the page of the linked URL and the next level of web pages (limit 0.5 Mb). This means that searches will return matching results from each level of web pages.

2. Click ✔Save.

Disable/Enable Cloud searching

Cloud searching can be disabled by selecting the **Disable cloud searching** checkbox in the **Cloud** section. An example is shown in Figure 101.
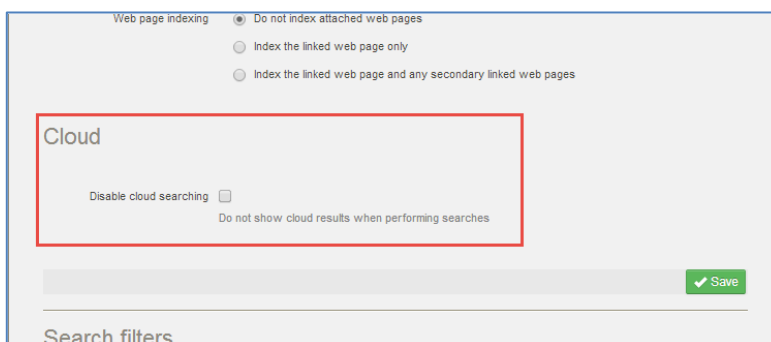

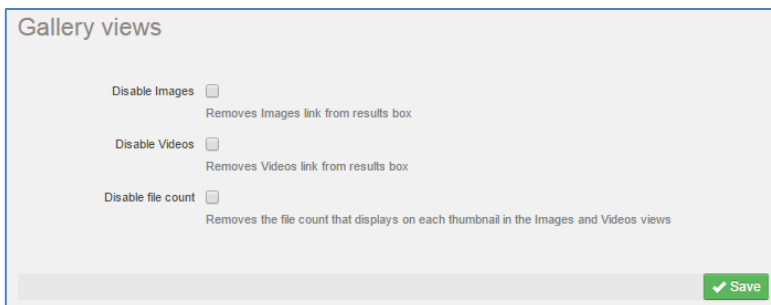**Figure 101 Cloud option**

Gallery views

In some cases, administrators may wish to disable the Images and/or Videos views. This will remove the Images and/or Videos links at the top left of the results box. Thumbnails for image and video files will still be created in the background, so if the views are enabled, thumbnails will display immediately.

Additionally, the file count that shows to the top left of image and video thumbnails when there are multiple files can also be disabled.

To configure Gallery views options

1. In the **Gallery views** section, select from the following options:
   - **Disable Images** – select to remove the **Images** link from the results box, or uncheck to add the Images link to the results box (default is unchecked).
   - **Disable Videos** – select to remove the **Videos** link from the results box, or uncheck to add the Images link to the results box (default is unchecked).
   - **Disable file count** – select to remove the file count indicator that displays at the top left of thumbnails when there are multiple image or video attachments.

An example is shown in Figure 102.

Gallery views

Disable Images ☐
Removes Images link from results box

Disable Videos ☐
Removes Videos link from results box

Disable file count ☐
Removes the file count that displays on each thumbnail in the Images and Videos views

✔ Save

**Figure 102 Gallery views options**

2. Click ✔ Save.

Search filters

Adding one or more search filters adds those filters to the filter pane on resource results screens. This allows the user more filtering options for their search results, enabling easier discovery of resources.

Search filters are based on MIME types. For example, a filter might be required to show only resources that have image attachments.
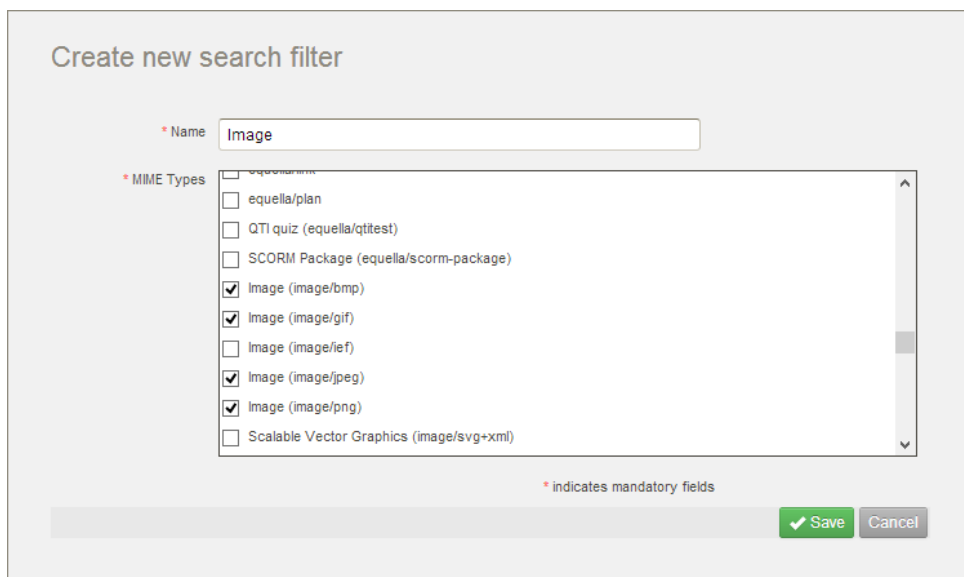
To add a Search filter

1. Click the **Add a new search filter** link. An example is shown in Figure 103.

Search filters
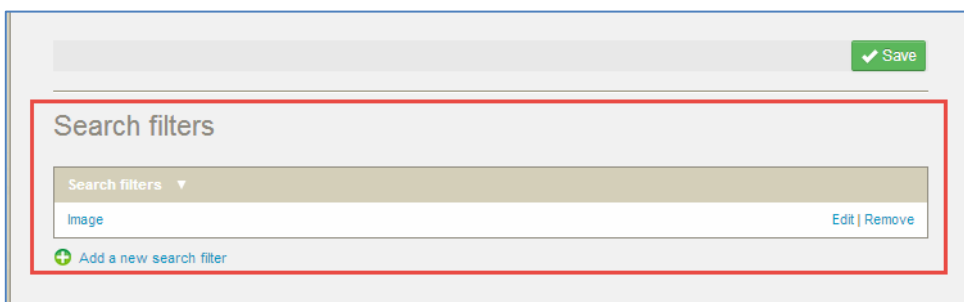⊕ Add a new search filter
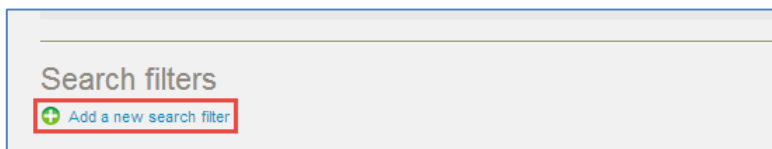
Figure 103 Add a new search filter link

The **Create new search filter** page displays. An example is shown in Figure 104.

Figure 104 Create new search filter

2. Enter a name for the filter in the **Name** field (e.g. *Image*).

3. Select the MIME Types required (e.g. Image (image/gif, image/bmp etc.)).

4. Click ![Save]. The Search setting page displays with the new filter listed. An example is shown in Figure 105.

Figure 105 Search settings with Search filter added

More search filters can be added by selecting the **Add a new search filter** link.

The search filter can be edited or removed by clicking the relevant link.

The search filter displays at the bottom of the filter pane on resource results screens under the heading of **Filter by resource type.** An example is shown in Figure 106.

Figure 106 Filter pane with added search filter

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.