

EQUELLA®

Canvas User Guide

Version 6.4

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Canvas Learning Management System and EQUELLA

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

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

Please note that this guide has been developed using EQUELLA version 6.3 (GA) and Canvas and as such may differ in appearance to your own installation. Contact your system administrator for access to extra features or to reconfigure your installation.

Canvas homepage and course page

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

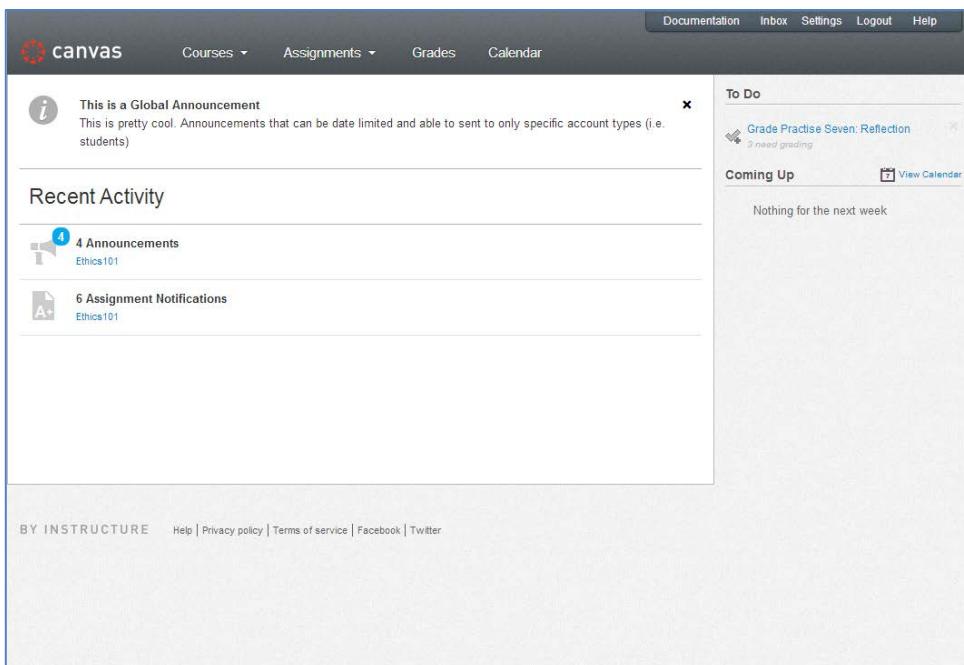


Figure 1 Canvas homepage

Courses can be viewed and selected by selecting the **Courses** drop-down at the top of the page. An example is shown in Figure 2.

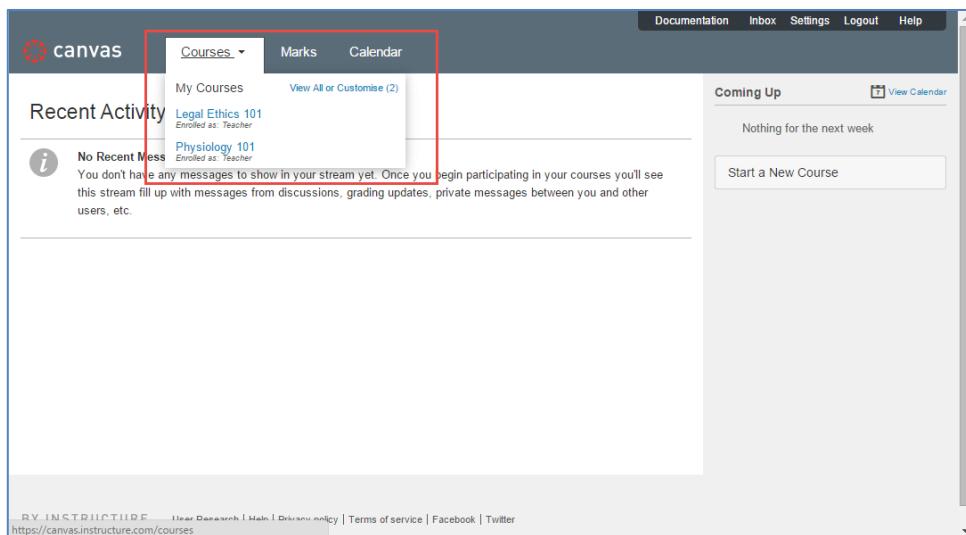


Figure 2 View and select courses

Click **Modules** from the course page navigation menu to view the course modules and existing content. An example is shown in Figure 3.

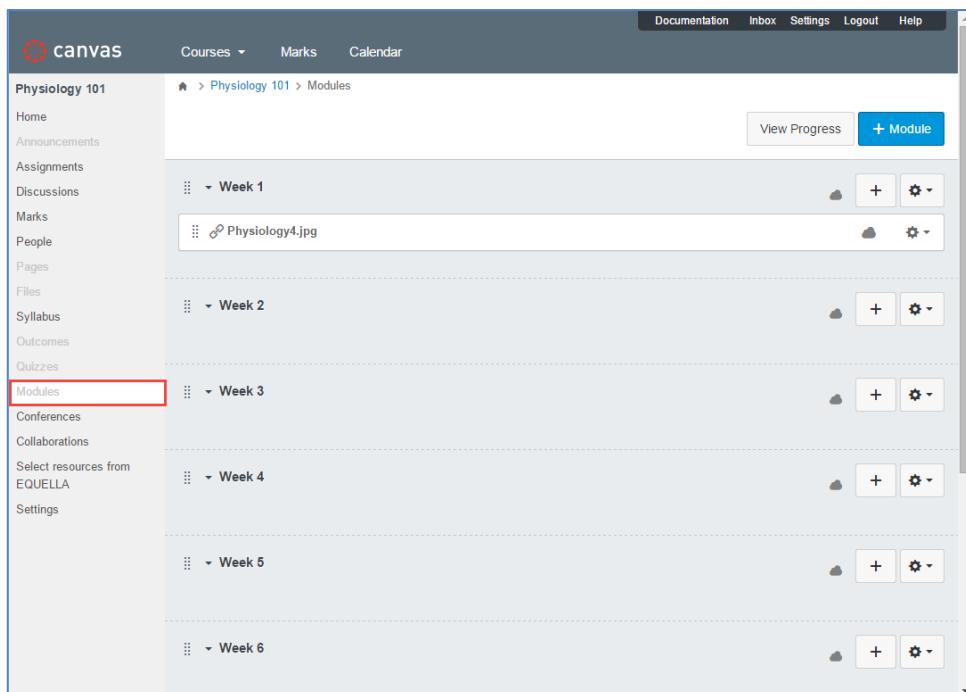


Figure 3 Canvas course modules

Adding content to Canvas course modules

EQUELLA content can be added to Canvas course modules in two ways:

- Selecting the **Select resources from EQUELLA** option from the course navigation menu. Using this option opens the EQUELLA Integration screen, which lists all the Canvas course modules on the right, and allows the user to search for and select

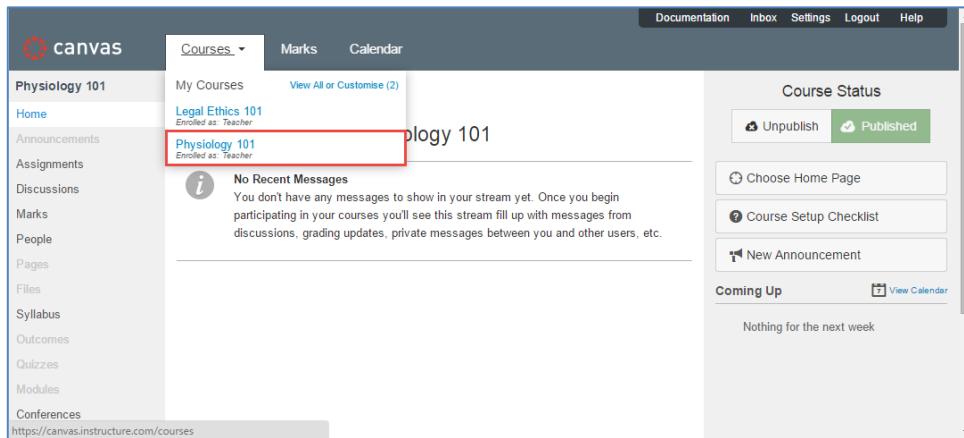
multiple resources to add to one or more course modules. See [Accessing the EQUELLA Integration screen](#) on page 6 and [Selecting items](#) on page 56 for further information.

- Selecting the  button beside a specific course module from the Modules page. Using this option allows the user to select EQUELLA as an external tool, and add a single resource to the selected module. See [Adding EQUELLA resources from within a Canvas module](#) on page 62 for further information.

Accessing the EQUELLA Integration screen

To add an EQUELLA resource to a course

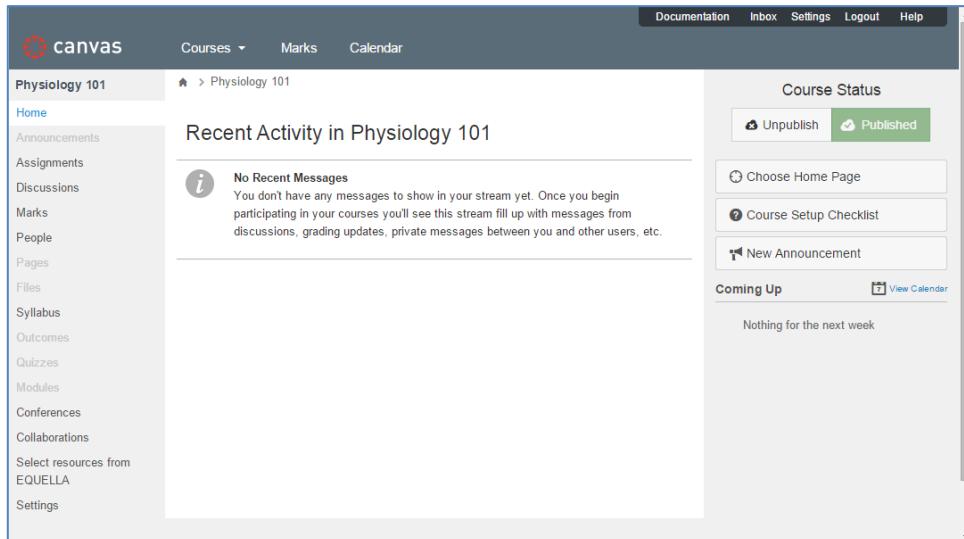
1. Select an appropriate course (e.g. *Physiology*) from the **Courses** drop-down. An example is shown in Figure 4.



The screenshot shows the Canvas interface. On the left is a sidebar with links like Home, Announcements, Assignments, Discussions, Marks, People, Pages, Files, Syllabus, Outcomes, Quizzes, Modules, and Conferences. The main area has tabs for Courses, Marks, and Calendar. A dropdown menu labeled 'Courses' is open, showing 'My Courses' with 'View All or Customise (2)'. Inside this dropdown, 'Physiology 101' is highlighted with a red box. To the right is a 'Course Status' section with 'Unpublish' and 'Published' buttons, and a 'Coming Up' section stating 'Nothing for the next week'.

Figure 4 Canvas Courses drop-down

The Course page displays. An example is shown in Figure 5.



The screenshot shows the Canvas Course page for 'Physiology 101'. The sidebar and top navigation are identical to Figure 4. The main content area is titled 'Recent Activity in Physiology 101' and contains a 'No Recent Messages' message. The right side features the 'Course Status' and 'Coming Up' sections from Figure 4.

Figure 5 Canvas Course page

2. Select **Select resources from EQUELLA** from the course navigation menu. The **EQUELLA Integration** screen displays. An example is shown in Figure 6.

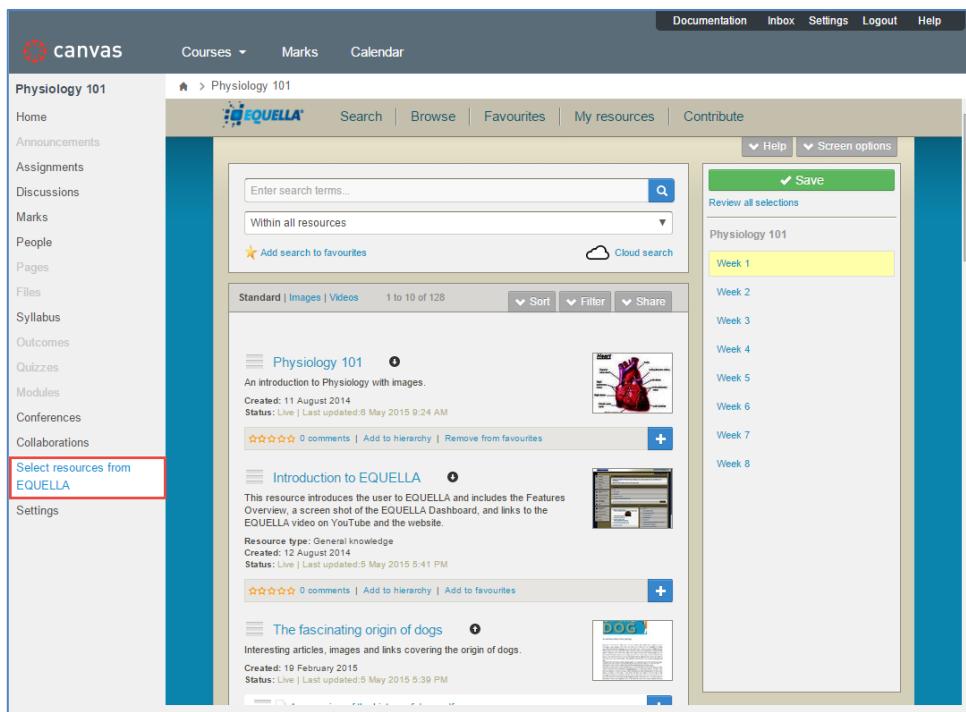


Figure 6 EQUELLA Integration screen

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 Canvas course modules using either the **+** button or by dragging and dropping resources to the relevant module.
- 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 **Canvas panel**. An example is shown in Figure 7.

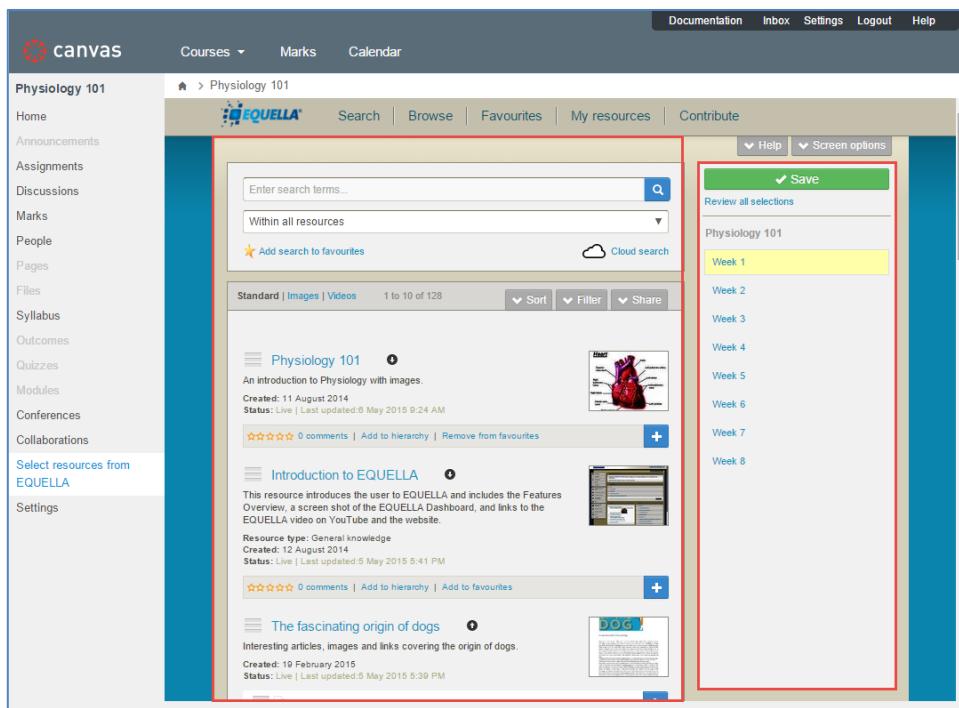


Figure 7 Integration screen – Search/Results and Canvas panel

- 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 8 for further details.
 - **Browse** – see [Browse](#) on page 14 for further details.
 - **Favourites** – see [Favourites](#) on page 15 for further details.
 - **My resources** – see [My resources](#) on page 17 for further details.
 - **Contribute** – see [Contribute](#) on page 18 for further details.
- The **Search/Results panel** has search relevant search options for each page, and the *Results* box underneath.
- The **Canvas** panel shows the **Course title**, and lists the **Course modules**. The first course module is highlighted and bolded as the default. EQUELLA resources are selected and added to course modules during the selection session. Selections can be previewed before they are saved to the Canvas course modules by clicking the course module 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 8.

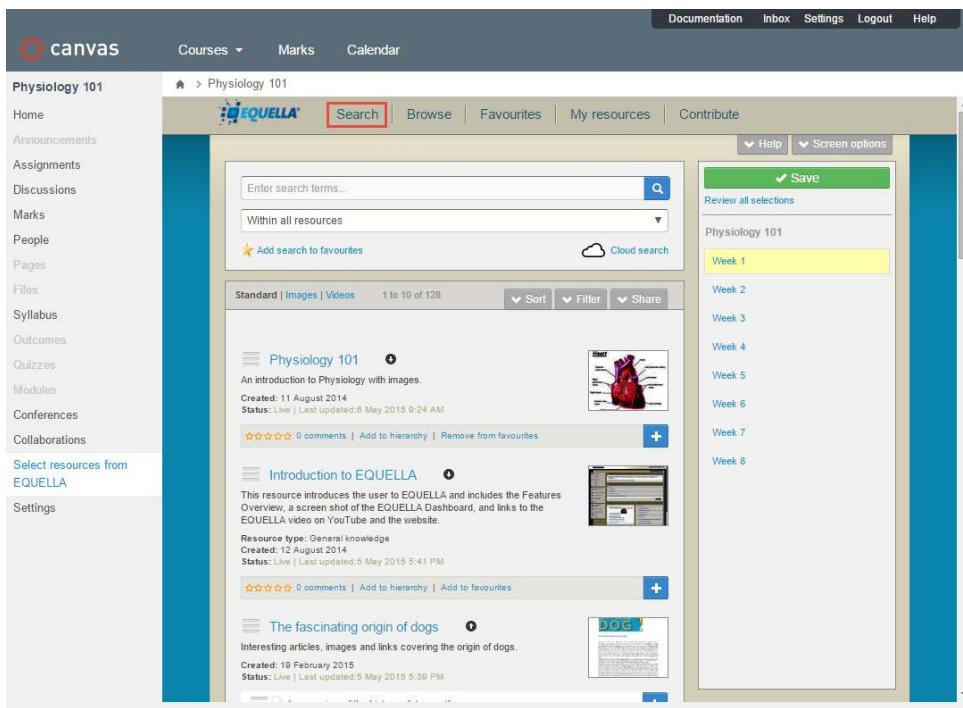


Figure 8 Integration screen - Search link

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 10 and [Advanced search](#) on page 11 for further information).
- **Add search to favourites** link – opens the **Add search to favourites** dialog (see [Adding or removing favourite resources](#) on page 15 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 9.



Figure 9 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 10.

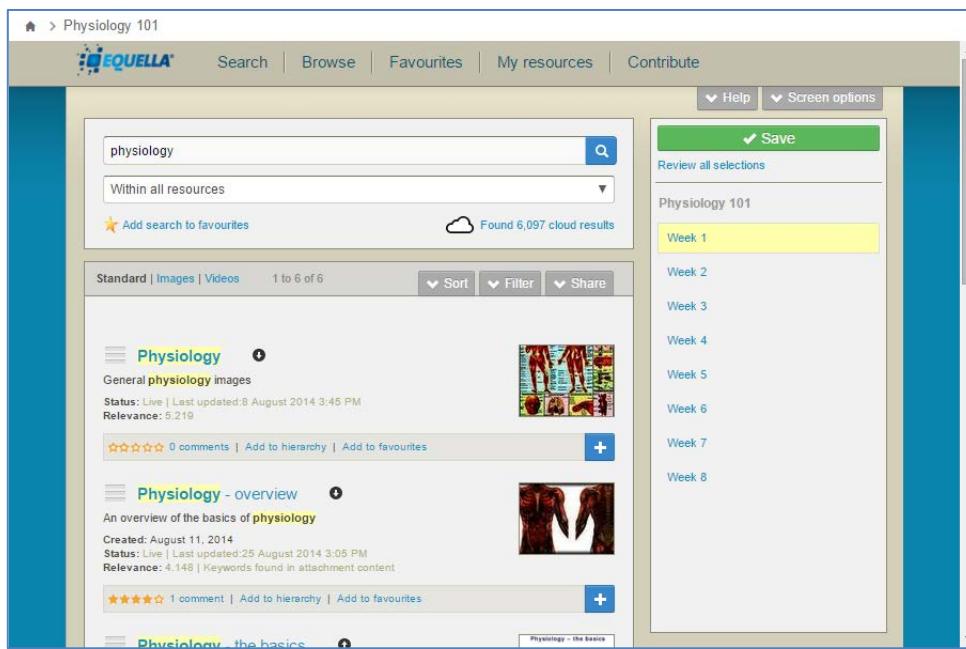


Figure 10 Search results

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 23 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 11.

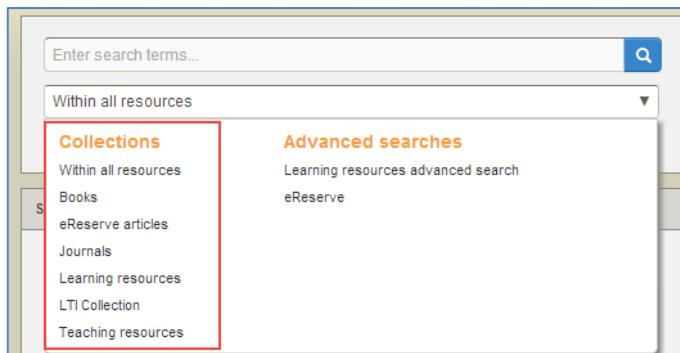


Figure 11 Within drop-down – Collections

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

Advanced search

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

To conduct an advanced search

1. Click the **Within** drop-down to display the available search categories. An example is shown in Figure 12.

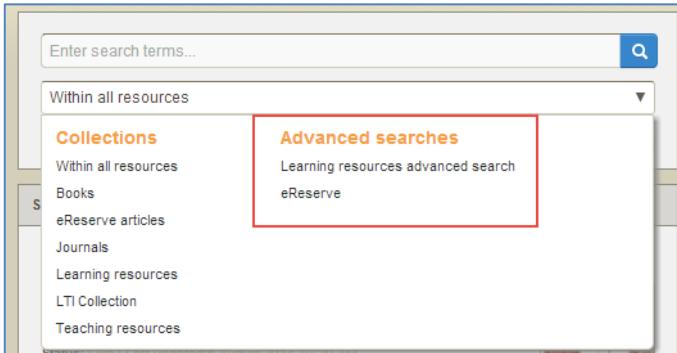


Figure 12 Within drop-down - Advanced searches

2. Select an advanced search (e.g. *Learning resources advanced search*) from the **Advanced searches** list. The advanced search criteria page displays. An example is shown in Figure 13.

A screenshot of the 'Learning resources advanced search' criteria page. The page has a header with the Canvas logo and navigation links for Documentation, Inbox, Settings, Logout, and Help. On the left is a sidebar with course navigation (Home, Announcements, Assignments, Discussions, Marks, People, Pages, Files, Syllabus, Outcomes, Quizzes, Modules, Conferences, Collaborations), a link to 'Select resources from EQUELLA', and Settings. The main content area has sections for 'Format of resource' (checkboxes for Audio, Video, Image, Document, Other), 'Aggregation level' (checkboxes for Level 1 through Level 4), 'Learning resource type' (checkboxes for Diagram, Exam, Exercise, Figure, Graph, Index, Lab demonstration, Lecture, Narrative text, Problem statement, Questionnaire, Self assessment, Simulation, Slide, Table), and a 'Review all selections' sidebar on the right. A green button at the top right says 'Save'. The sidebar shows a list of weeks: Week 1 (highlighted in yellow), Week 2, Week 3, Week 4, Week 5, Week 6, Week 7, and Week 8.

Figure 13 Advanced search criteria page

3. 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 14.

The screenshot shows the EQUELLA search interface. In the search bar, the term '/item/lom/technical/format is image' is entered. Below the search bar, there are buttons for '+ Edit query' and 'Clear'. To the right of the search bar, there is a sidebar titled 'Physiology 101' with a list of weeks from Week 1 to Week 8. Week 1 is highlighted with a yellow background. On the main search results page, two items are listed: 'Sample content - The Overland Track' and 'Sample content - Walls of Jerusalem'. Both items have small thumbnail images and detailed descriptions below them. At the bottom of the search results page, there are buttons for 'Edit query', 'Clear', 'Comments', 'Add to hierarchy', and 'Add to favourites'.

Figure 14 Advanced Search criteria in place

Additional advanced search information and buttons are added to the **Search** pane, as shown in Figure 14.

4. 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 15.

The screenshot shows the EQUELLA interface with a search bar containing 'physiology'. Below the search bar, a dropdown menu shows 'Within all resources'. A button labeled 'Add search to favourites' is visible. To the right, a message box displays 'Found 6,097 cloud results'. The main content area lists three items under the heading 'Physiology': 'General physiology images', 'Physiology - overview', and 'Physiology - the basics'. Each item has a thumbnail, status information (e.g., 'Status: Live | Last updated: 8 August 2014 3:45 PM'), and a rating section. On the right side, a sidebar titled 'Review all selections' shows a list of weeks from Week 1 to Week 8, with Week 1 highlighted.

Figure 15 Cloud results link

2. Click the **Local resources** link to return to the local resource results. An example is shown in Figure 16.

The screenshot shows the EQUELLA interface with a search bar containing 'ethics'. Below the search bar, a dropdown menu shows 'Within all resources'. A button labeled 'Add search to favourites' is visible. To the right, a message box displays 'Local resources'. The main content area lists three items under the heading 'Results': 'Ethics: Moral Status', 'Ethics: Killing Animals for Food', and 'Ethics: The Problem of Evil'. Each item has a thumbnail, status information (e.g., 'Status: Live | Last updated: 2 months ago'), and a rating section. On the right side, a sidebar titled 'Review all selections' shows a list of weeks from Week 1 to Week 8, with Week 1 highlighted.

Figure 16 Cloud results with Local resources link

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

Browse

The Browse page 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 17.

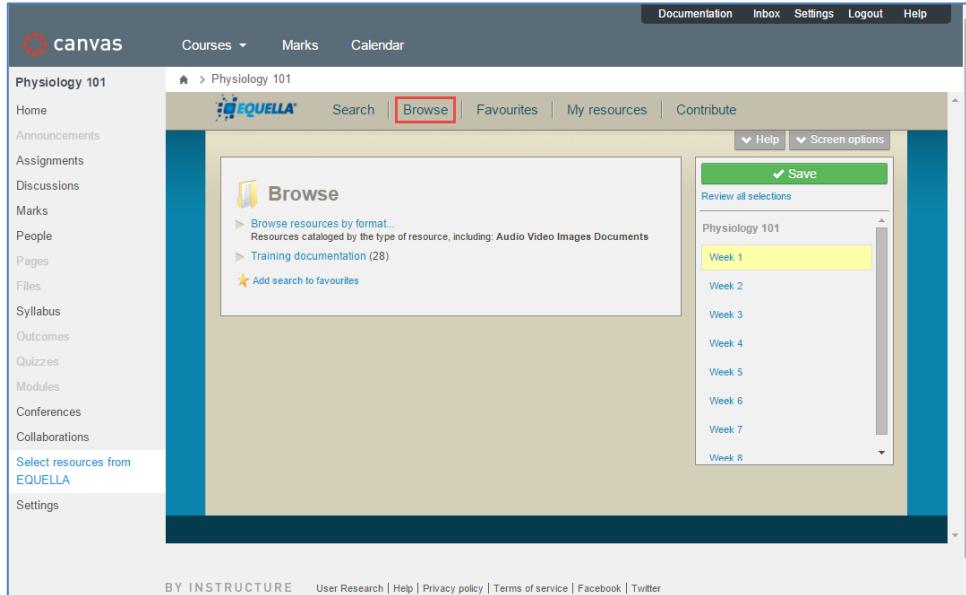


Figure 17 Integration screen - Browse view

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 18.

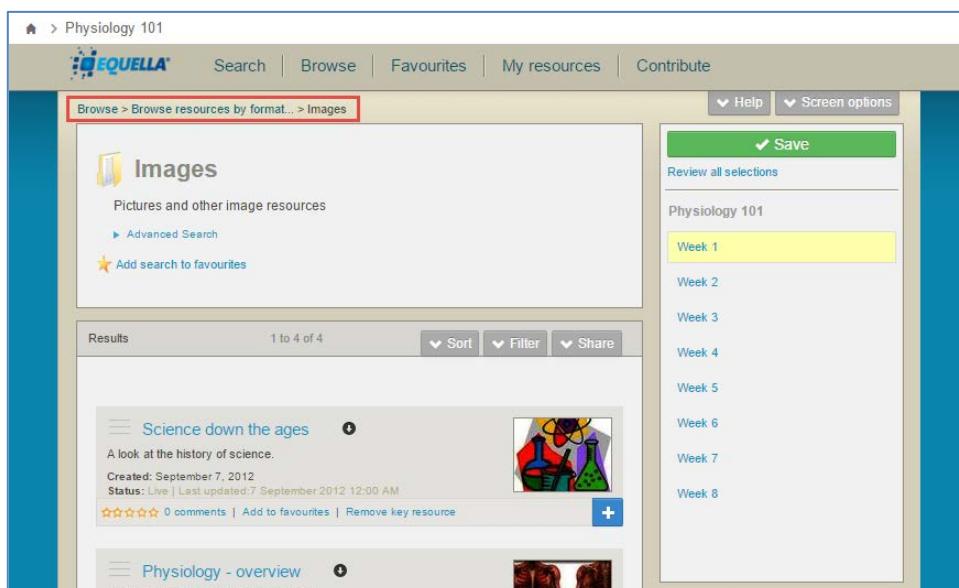


Figure 18 Browse page - hierarchy breadcrumb

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 19.

The screenshot shows the EQUELLA interface. The top navigation bar includes links for Home, Physiology 101, Search, Browse, **Favourites** (which is highlighted with a red box), My resources, and Contribute. Below the navigation is a toolbar with Help, Screen options, Save (with a checkmark), and Review all selections. The main content area is titled 'Favourites' and contains tabs for Resources and Searches. It shows a single resource entry for 'Physiology 101', described as 'An introduction to Physiology with images'. The entry includes details like Created: 11 August 2014, Status: Live, Last updated: 6 May 2015 9:24 AM, and Date favourited: 12 May 2015 11:12 AM. Below the entry are links for 0 comments, Add to hierarchy, and Remove from favourites. To the right of the main content is a sidebar titled 'Physiology 101' which lists weeks 1 through 8. Week 1 is highlighted with a yellow background, while the others are in light blue. At the bottom of the sidebar is a 'Save' button with a checkmark and the text 'Review all selections'.

Figure 19 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 20.

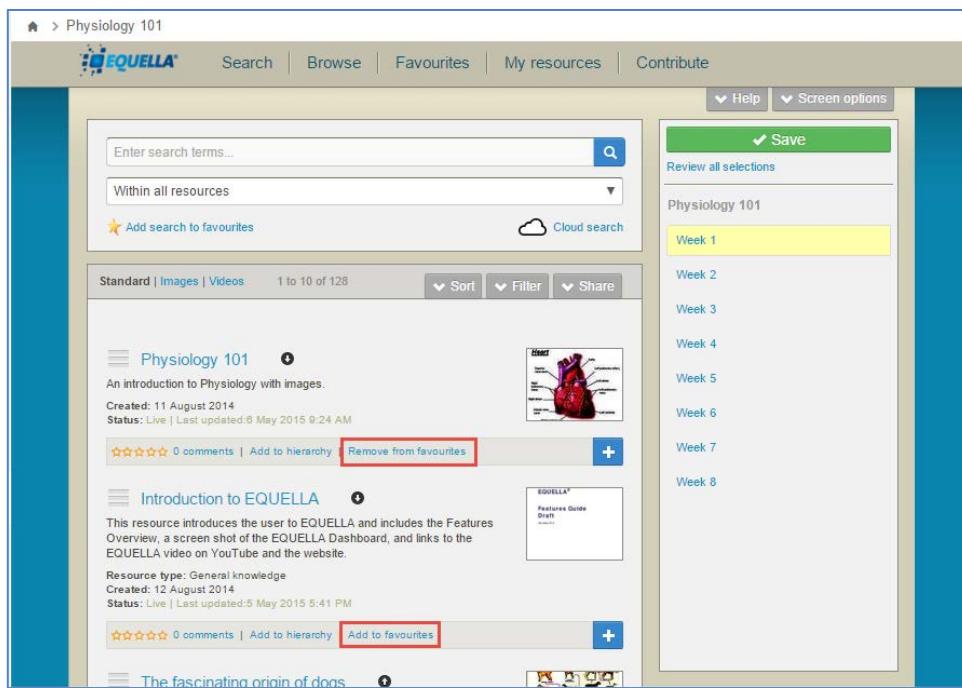


Figure 20 Add to/Remove from favourites links

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 21.

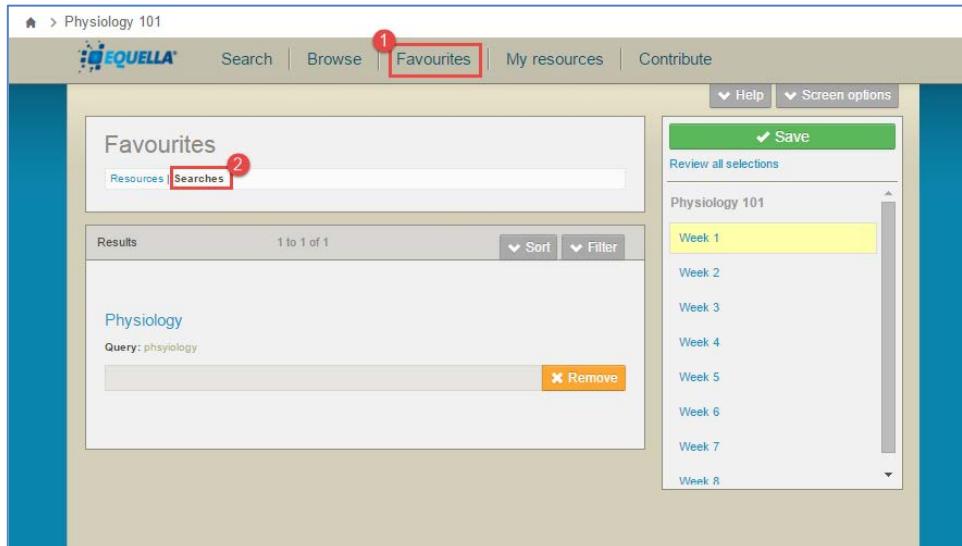


Figure 21 Favourites - Searches page

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 22.

The screenshot shows the EQUELLA search interface for 'Physiology 101'. In the search bar, 'physiology' is entered. Below the search bar, there's a dropdown menu set to 'Within all resources'. A red box highlights the 'Add search to favourites' button, which is located next to the search icon. To the right of the search results, a sidebar lists weeks from Week 1 to Week 8. Week 1 is highlighted with a yellow background. At the top right of the main search area, there's a green 'Save' button with a checkmark and the text 'Review all selections'.

Figure 22 Search page - Add search to favourites link

- The **Add search to favourites** dialog displays. An example is shown in Figure 23.

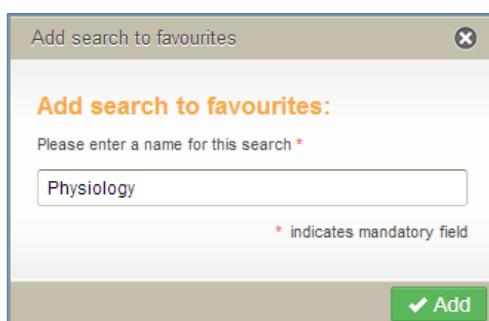


Figure 23 Add search to favourites dialog

- Enter a name for the search, then click **Add**. The search now displays on the **Favourites – Searches** page, as shown in Figure 21.

My resources

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

To view My Resources

1. Select the **My resources** link from the top of the page. The **My resources** page displays. An example is shown in Figure 24.

The screenshot shows the EQUELLA interface for managing resources. At the top, there's a navigation bar with links for Home, Physiology 101, Search, Browse, Favourites, My resources (which is highlighted with a red box), Contribute, Help, and Screen options. The main area is titled 'My resources' and includes tabs for Published, Drafts, Scrapbook, Moderation queue, Archive, All resources (which is selected and highlighted with a red box), and Purchased. Below these tabs, there's a search bar with a 'Add search to favourites' button. The results section shows one item: 'Law and ethics.pdf'. It has a small thumbnail, the file name, a status indicator (green circle with a dot), the creation date ('Created: 12 May 2015'), and the last update ('Status: Live | Last updated: 12 May 2015 3:16 PM'). There are also buttons for comments, hierarchy, and favourites. To the right of the results is a sidebar with a 'Save' button and a list of weeks from Week 1 to Week 8, where Week 1 is highlighted with a yellow background.

Figure 24 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 Canvas 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 Canvas 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 25.

The screenshot shows the EQUILLA Contribute page embedded within a Canvas application window. The left sidebar of the Canvas interface lists various course modules like Home, Announcements, Assignments, etc. The main content area is the EQUILLA contribute screen. At the top, it asks 'What type of resource are you contributing?'. Below this, there's a 'Quick contribution' section with a 'Browse' button and an 'Upload' button. Further down, there are sections for 'Demonstration', 'eReserve articles', 'Journals', 'Learning resources', and 'Teaching resources'. The 'Contribute' button in the top right of the EQUILLA header is highlighted with a red box.

Figure 25 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 EQUILLA repository) or a standard collection.

Quick contribution

To create a new EQUILLA resource using Quick contribution

1. Select the **Contribute** link from the integration screen. The Contribute page displays. An example is shown in Figure 25.
2. In the **Quick contribution** panel, click **Browse** and locate and **Open** the required file.
3. Click **Upload**. An example is shown in Figure 26.

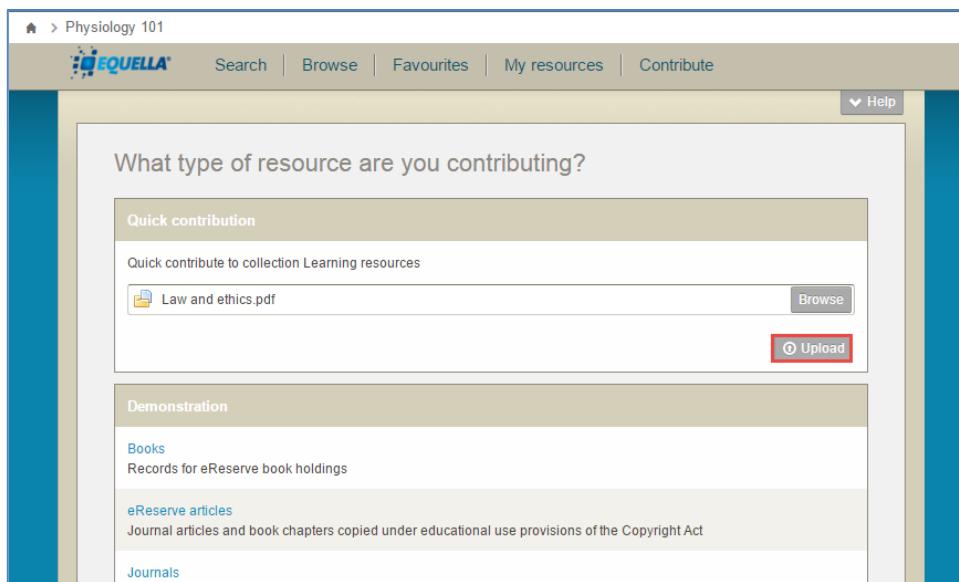


Figure 26 Quick contribute - Upload a file

The file is automatically added to the Canvas course module that was highlighted in the LMS panel when the Contribute link was selected. An example is shown in Figure 27.

A screenshot of the Canvas course interface. On the left, there's a sidebar with various course management links like 'Home', 'Announcements', 'Assignments', etc. The 'Modules' link is currently selected. In the main area, it shows a list of modules: 'Week 1', 'Week 2', 'Week 3', and 'Week 4'. Each module contains a list of files. In 'Week 1', there are two files: 'Physiology4.jpg' and 'Law and ethics.pdf', with 'Law and ethics.pdf' highlighted by a red box.

Figure 27 Canvas course with Quick contribution file added

Additionally, the file has been added into EQUILLA with the file name as the title and description. An example is shown in Figure 28.

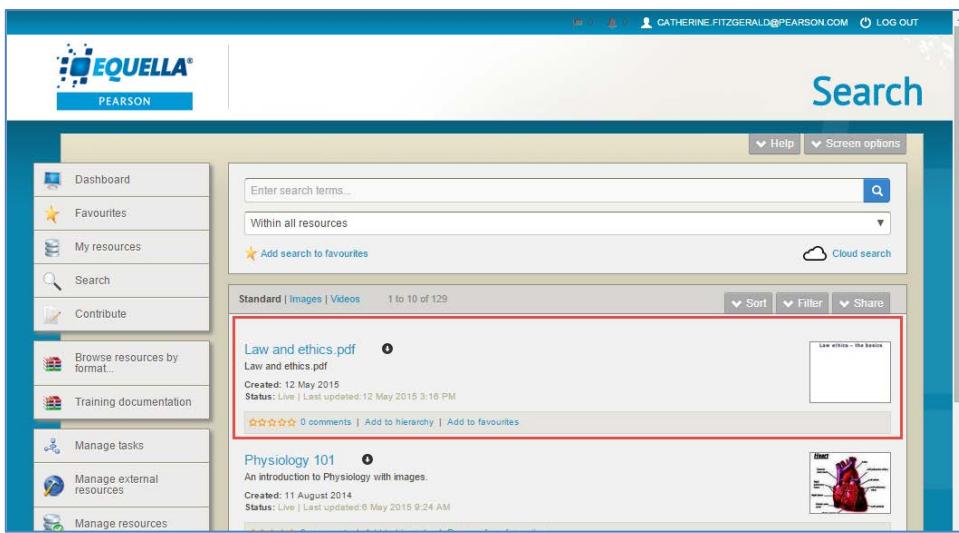


Figure 28 Quick contribution as appears in EQUELLA repository

Standard contribution

To contribute a new EQUELLA resource

1. Select the **Contribute** link from the integration screen. The Contribute page displays. An example is shown in Figure 25.
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 29. Wizard controls will differ for each collection.

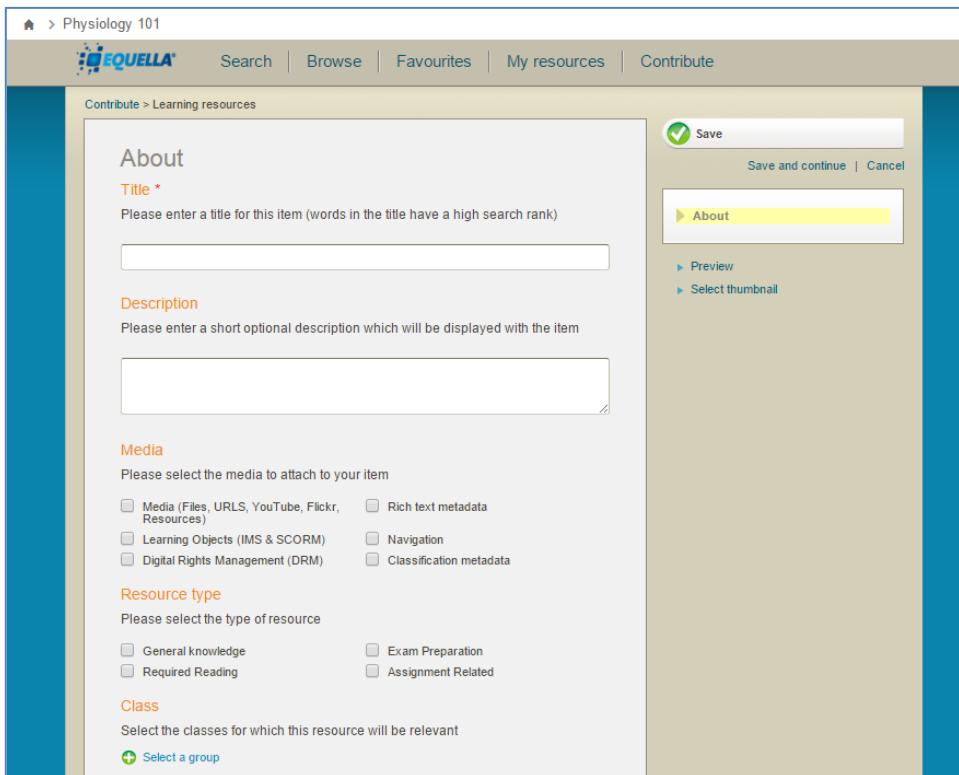


Figure 29 Example contribution wizard

Contribution wizard elements can include:

- —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 30.

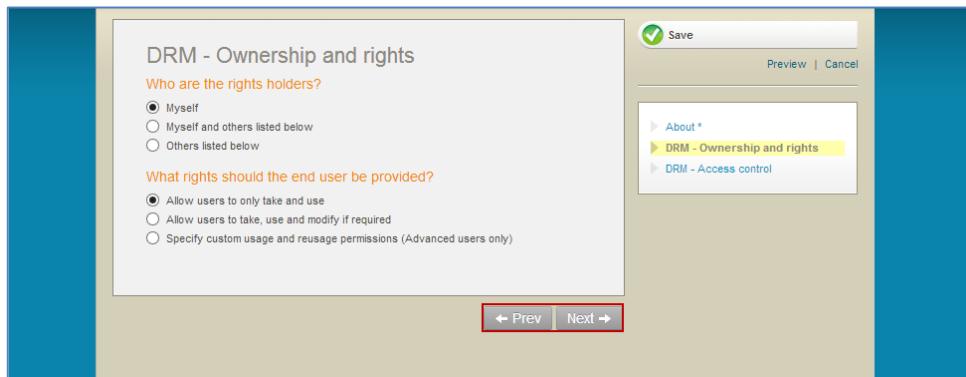


Figure 30 Next and previous buttons in contribution wizard

- **Pages** pane—lists the wizard pages. Select the page name link to move to that page. An example is shown in Figure 31.

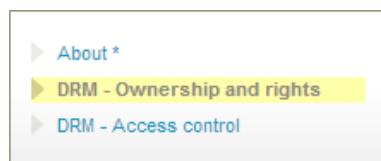


Figure 31 Pages pane

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

To submit the resource to the repository

1. Click  to display a dialog. An example is shown in Figure 32.

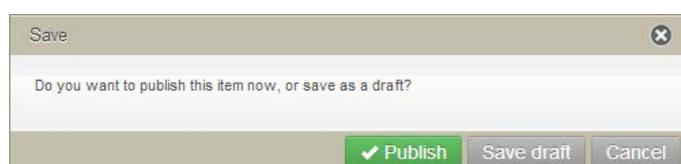


Figure 32 Save dialog

2. If the resource is not ready to be submitted, either:
 - Click **Save draft**—the resource is saved as a draft and can be edited and submitted later, or
 - Click **Cancel** to close the dialog and return to the resource for further editing.

3. If the resource is ready to be submitted, click Publish. The resource is published to the repository and can be selected for addition to a course (see Figure 34). If the collection selected for contribution is associated with a Moderation Workflow, the dialog shown in Figure 33 displays.



Figure 33 Submit for moderation dialog

Select Submit for moderation to enter the resource into the moderation workflow. The **Summary** page displays with the Canvas panel. An example is shown in Figure 34.

Figure 34 Integration screen - Summary page

Search results – Standard view

An example of a Search results page is shown in Figure 35.

The screenshot shows the EQUELLA search interface. At the top, there's a navigation bar with links for Home, Search, Browse, Favourites, My resources, and Contribute. Below the search bar, there's a search form with fields for 'Enter search terms...' and 'Within all resources', along with a 'Cloud search' button. The main content area displays search results in a grid format. Each result includes a title, a brief description, creation date, last update date, and status. The first result, 'Physiology 101', is highlighted with a yellow background. To the right, a sidebar titled 'Week 1' through 'Week 8' is visible, with a green 'Save' button at the top. A 'Review all selections' link is also present in the sidebar.

Figure 35 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 32 for further information) and Videos view (see [Search results – Videos view](#) on page 34).

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 36.
- - 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*.

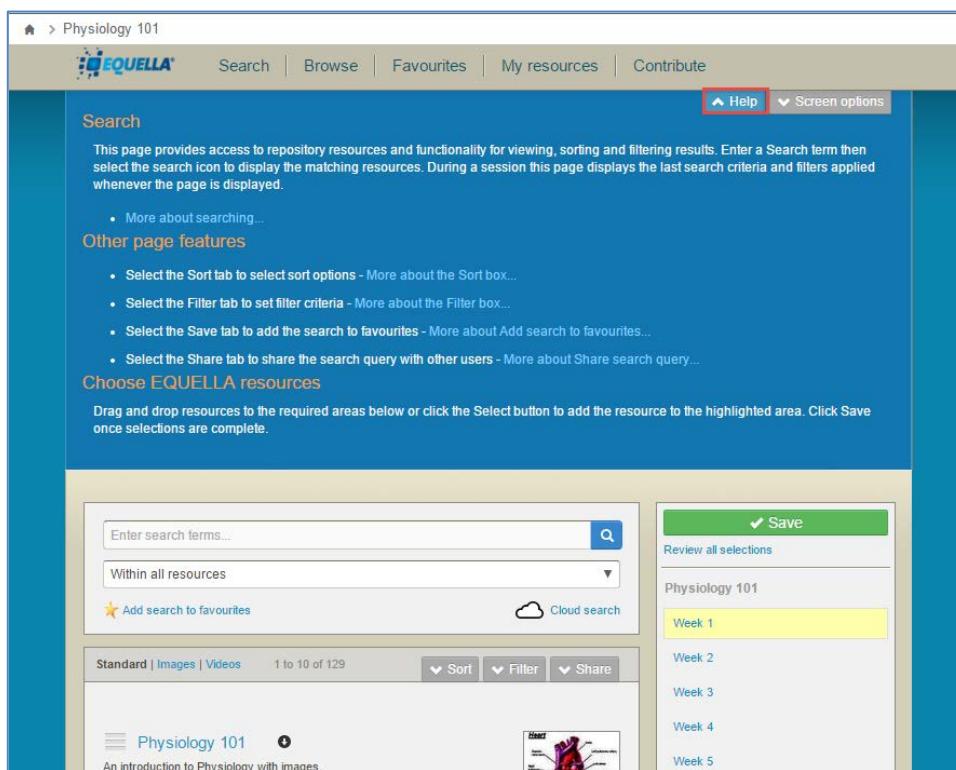
NOTE: Only resources with the status of Live can be added to course modules.

- **Last updated** - the time period passed since the resource was last updated.
- **Star rating and <x> comment** - 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 40.

- **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 15 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 26 for further details.
-  - click this button to select the resource summary page or attachment for addition to the currently selected Canvas module.

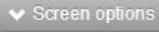
Other elements on the Search page include:

-  - click the button to display context-sensitive help at the top of the page. An example is shown in Figure 36. 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's a navigation bar with links for Physiology 101, Home, Search, Browse, Favourites, My resources, and Contribute. Below the navigation bar, there's a 'Help' button and a 'Screen options' button. The main content area has sections for 'Search', 'Other page features', and 'Choose EQUELLA resources'. In the 'Search' section, there's a search bar with placeholder text 'Enter search terms...', a dropdown for 'Within all resources', a 'Cloud search' button, and filters for 'Standard', 'Images', and 'Videos'. The results list shows '1 to 10 of 129' items. One item is highlighted: 'Physiology 101: An introduction to Physiology with images.' On the right side, a 'Save' panel is open, showing a list of weeks: Week 1 (highlighted), Week 2, Week 3, Week 4, and Week 5. The 'Save' button is checked.

Figure 36 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 37.

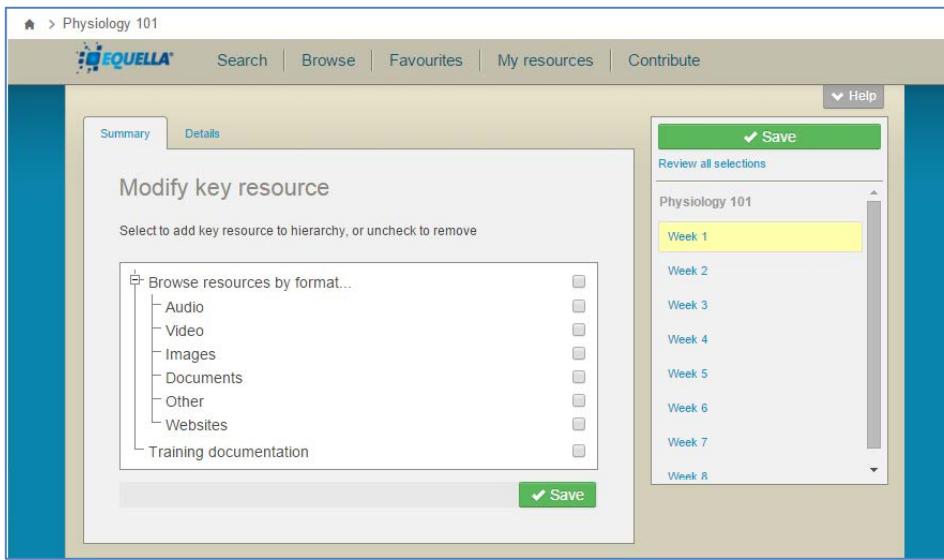


Figure 37 Modify key resource page

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 37.

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

4. Click . A confirmation screen displays, as shown in Figure 38.

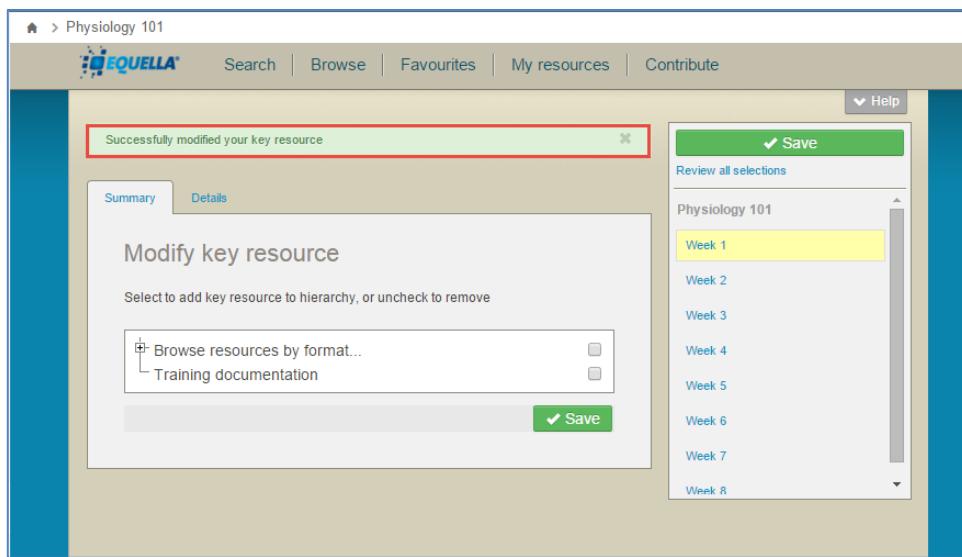


Figure 38 Confirmation of Key resource modification

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 39.

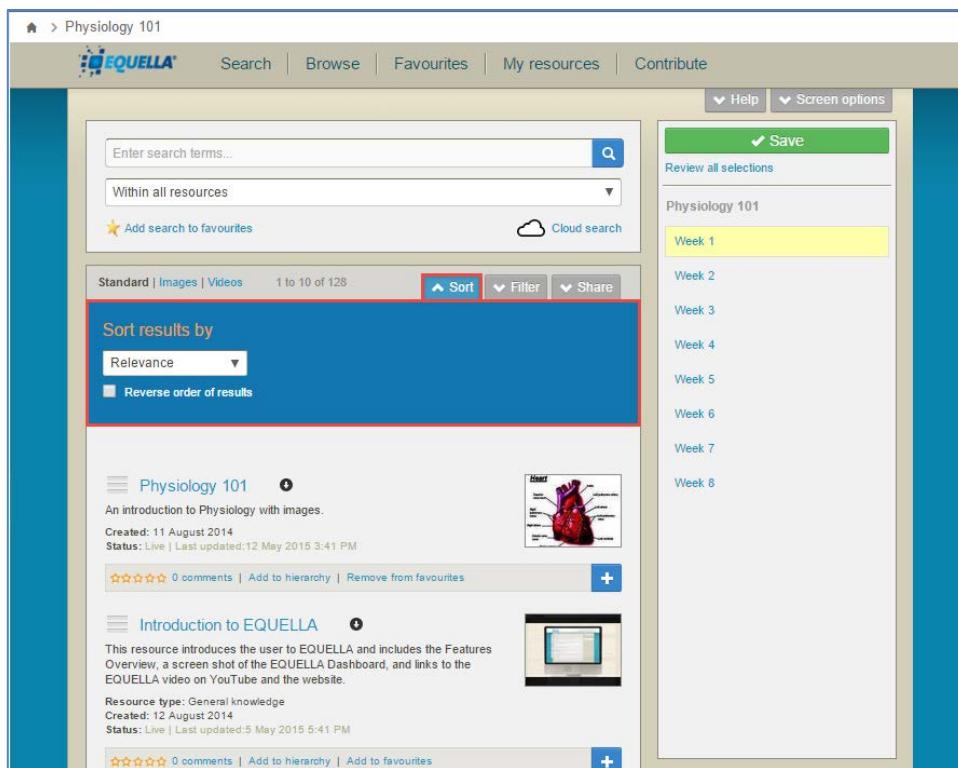


Figure 39 Sort options

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 40.

The screenshot shows the Equella interface for a course titled 'Physiology 101'. The left sidebar contains navigation links: 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'. The main area has a search bar with placeholder 'Enter search terms...' and a dropdown menu set to 'Within all resources'. Below the search bar are buttons for 'Add search to favourites' and 'Cloud search'. A 'Filter' button is highlighted with a red box. To the right, there's a sidebar with a 'Save' button and a 'Review all selections' link. The main content area shows a list of weeks from 'Week 1' to 'Week 8'. Week 1 is highlighted with a yellow background. At the bottom, there's a resource card for 'Physiology 101' with a thumbnail image of a heart.

Figure 40 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 41.

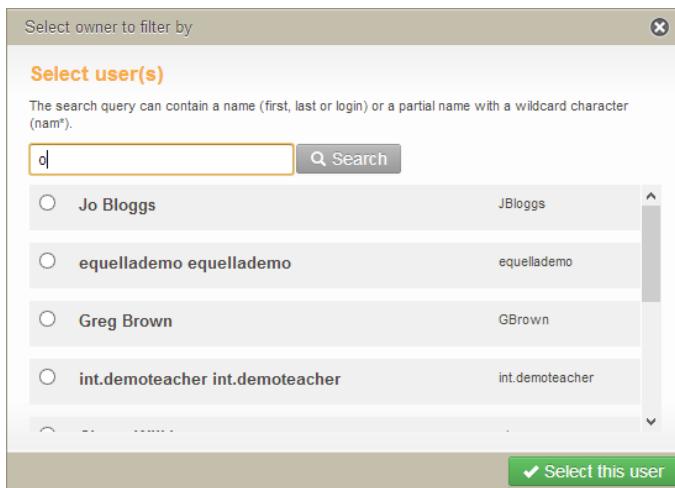


Figure 41 Select owner to filter by dialog

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 42.

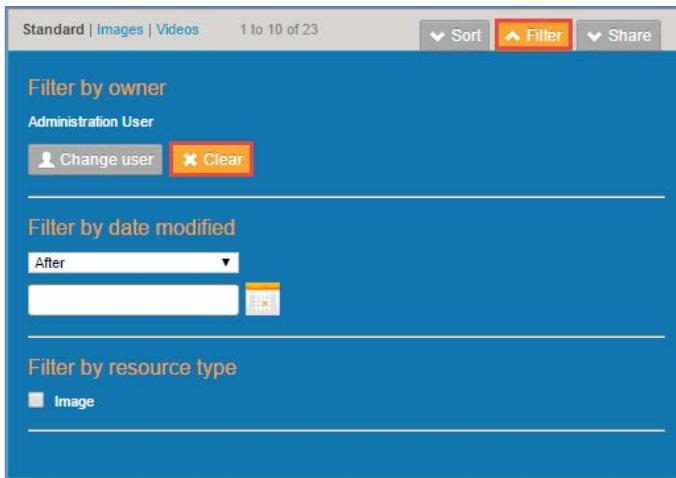


Figure 42 Example with Owner filter set

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 in calendar field or to display a calendar control. An example is shown in Figure 43.

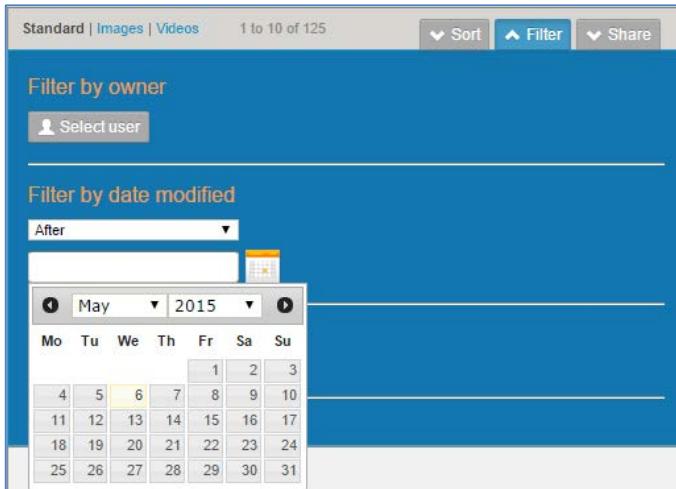


Figure 43 Calendar control

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 44.

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...". Underneath the search bar is a dropdown menu set to "Within all resources". A red box highlights a message box containing the text "116 records have been filtered out - clear filters". Below this is a button labeled "Add search to favourites" and a "Cloud search" button. The main search results area displays two items: "Physiology 101" and "Introduction to EQUELLA". Each item has a thumbnail image, resource type, creation date, last update date, and status. Below each item is a rating section with five stars and the number "0 comments", followed by "Add to hierarchy" and "Add to favourites" buttons. To the right of the search results is a sidebar titled "Physiology 101" with tabs for Week 1 through Week 8. Week 1 is highlighted with a yellow background. At the top right of the sidebar is a green "Save" button with a checkmark and the text "Review all selections".

Figure 44 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 45.

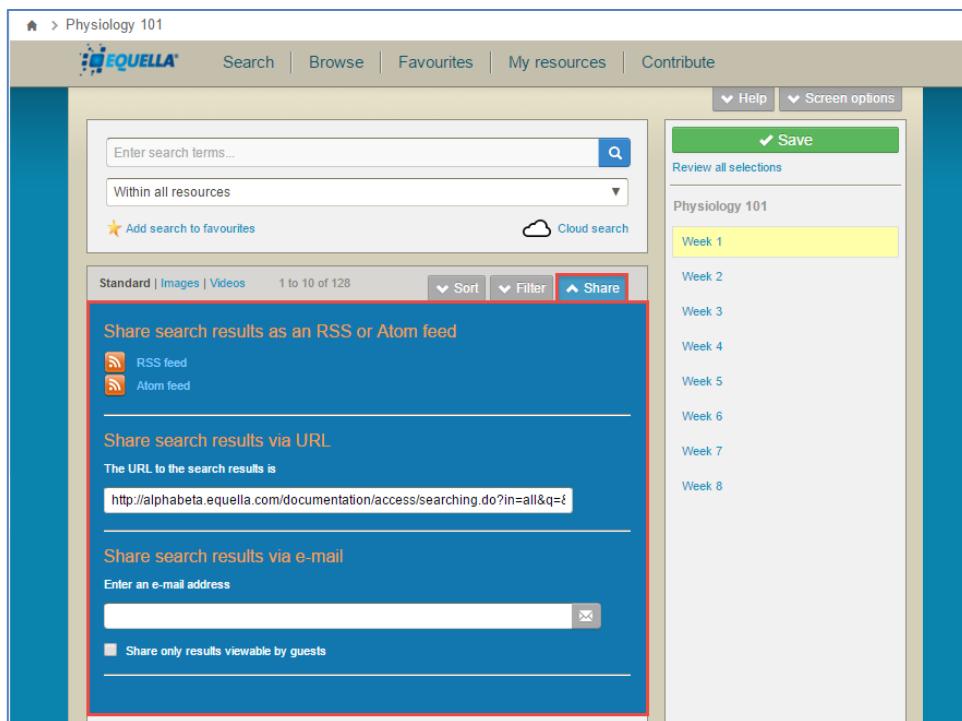


Figure 45 Share search results dialog

- **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 46.

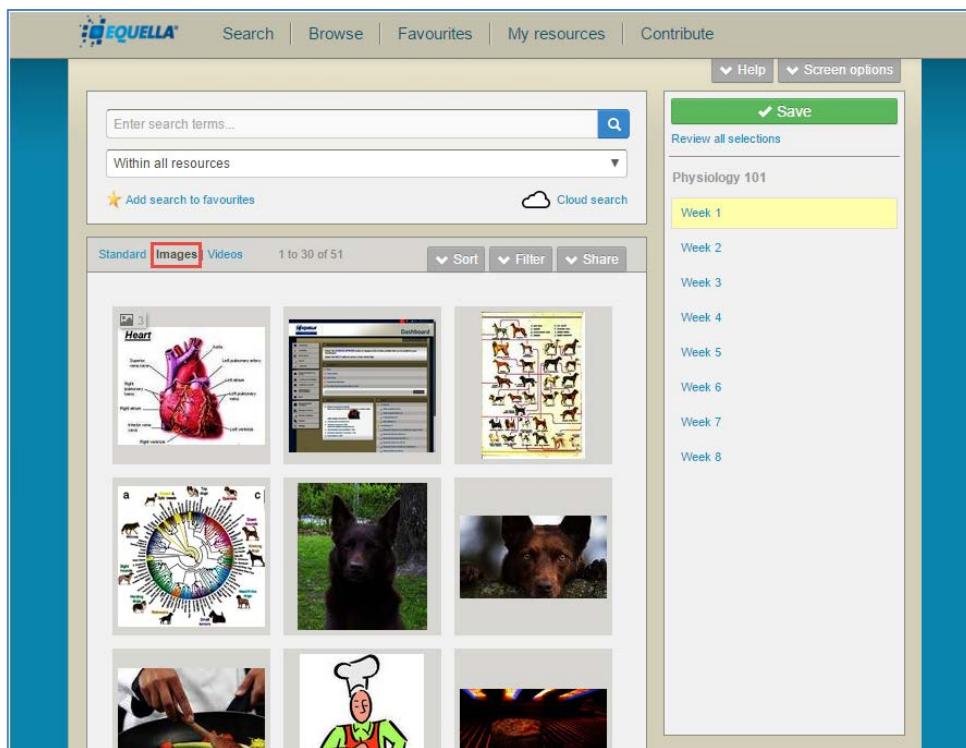


Figure 46 Images view

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 47.

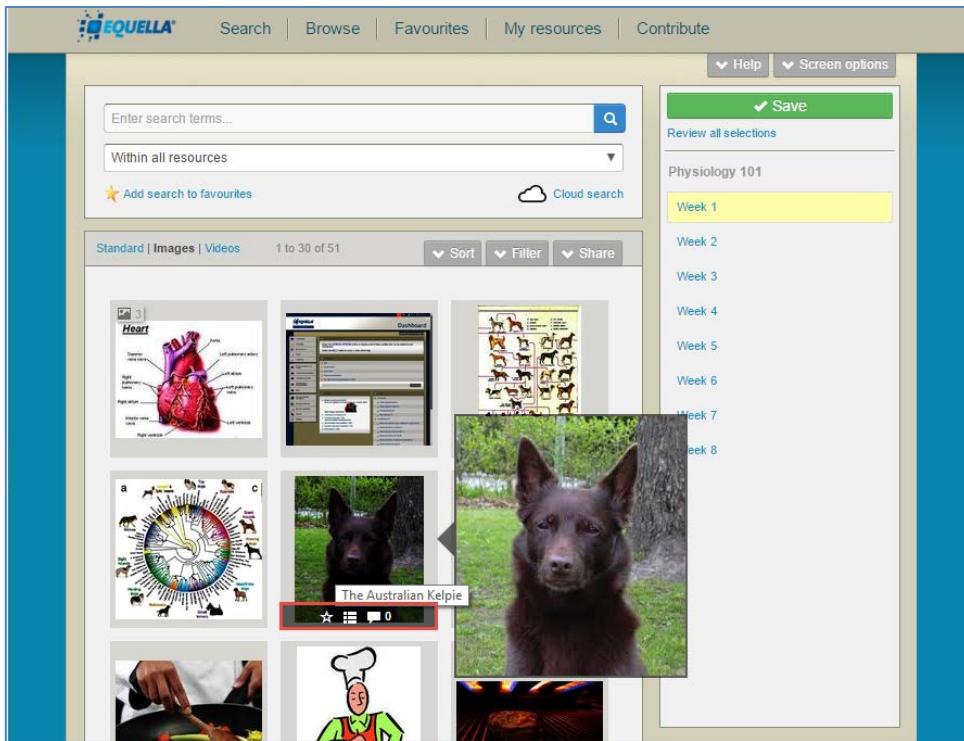


Figure 47 Images view - image enlarged with mouse hover

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 15 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 26 for further information).
- comment - 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 48.

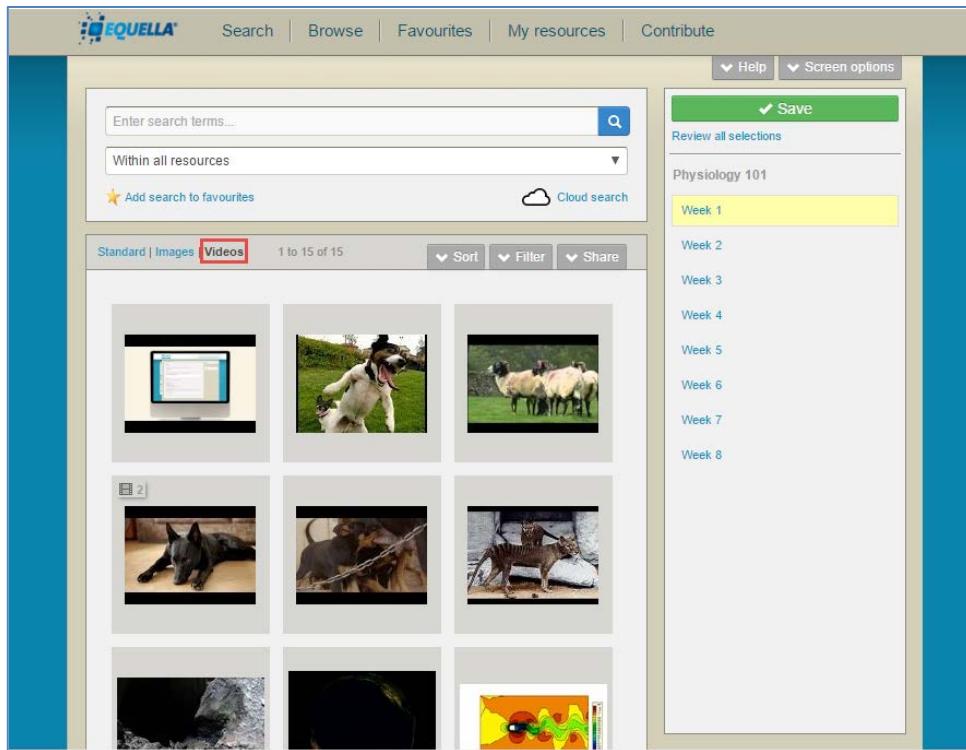


Figure 48 Videos view

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

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

Hover the mouse over a specific video to display a larger version with a **Play** button to start playing a review. To stop playing the preview, point the mouse away from the preview box. An example is shown in Figure 49.

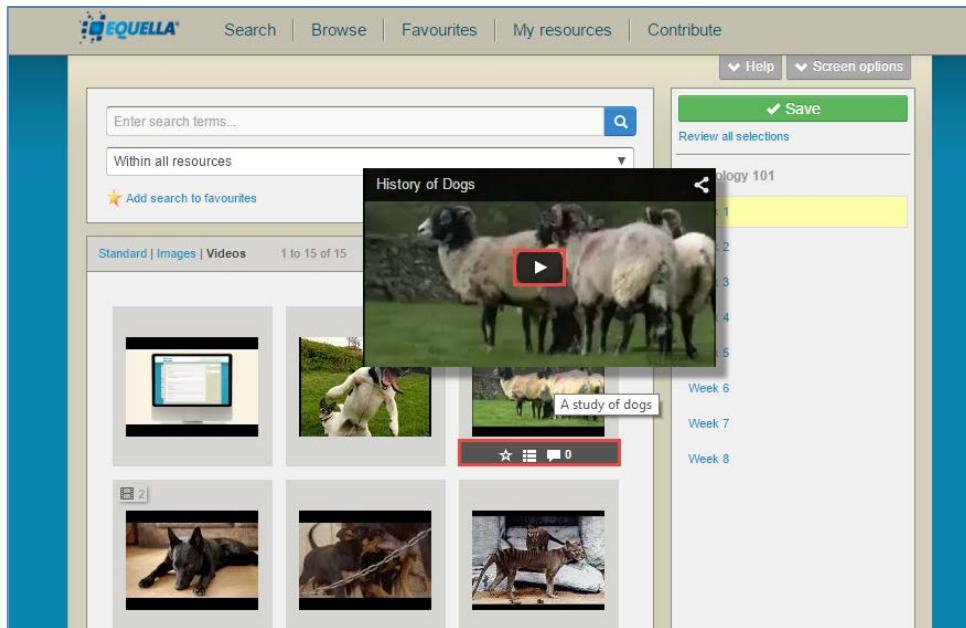


Figure 49 Videos view - video enlarged with mouse hover

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 15 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 26 for further information).
- 💬 - Click to open the Resource summary page with a focus on the Comments section.

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

Resource summary page

The Resource summary page is used to view, edit, comment and rate resources. An example is shown in Figure 50.

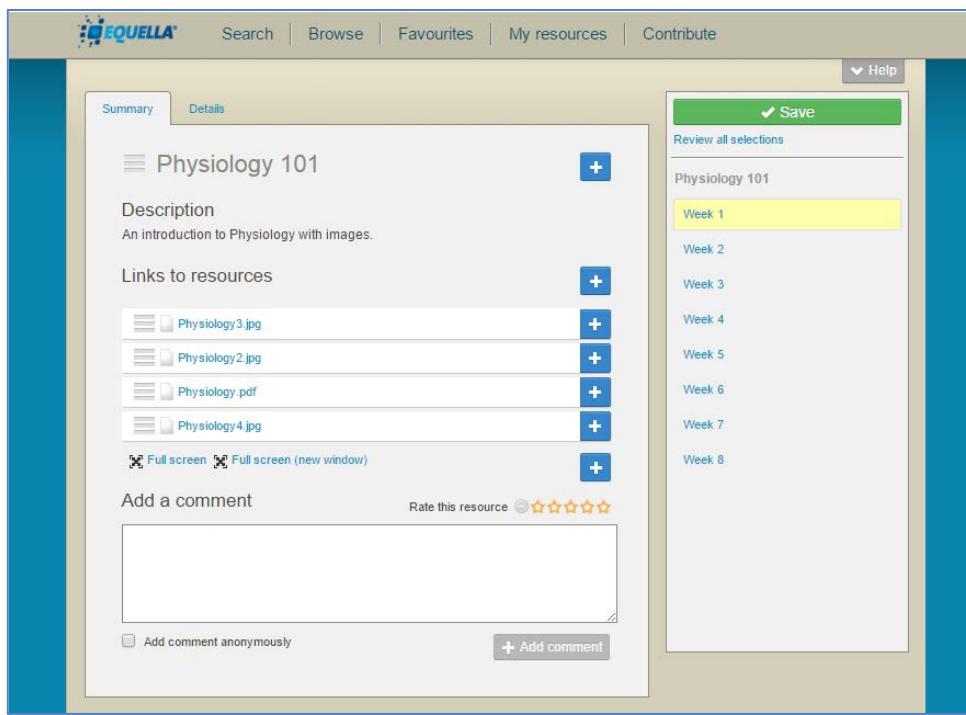


Figure 50 Integration screen Resource summary page - Summary tab (default)

The Resource 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 37 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 41 for further details).

Summary tab

The **Summary** tab can include the following information:

- **Title**
- **Description**
- **Links to resources section** – lists the resource attachments. See [View attachments](#) on page 37 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 40.

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 51.

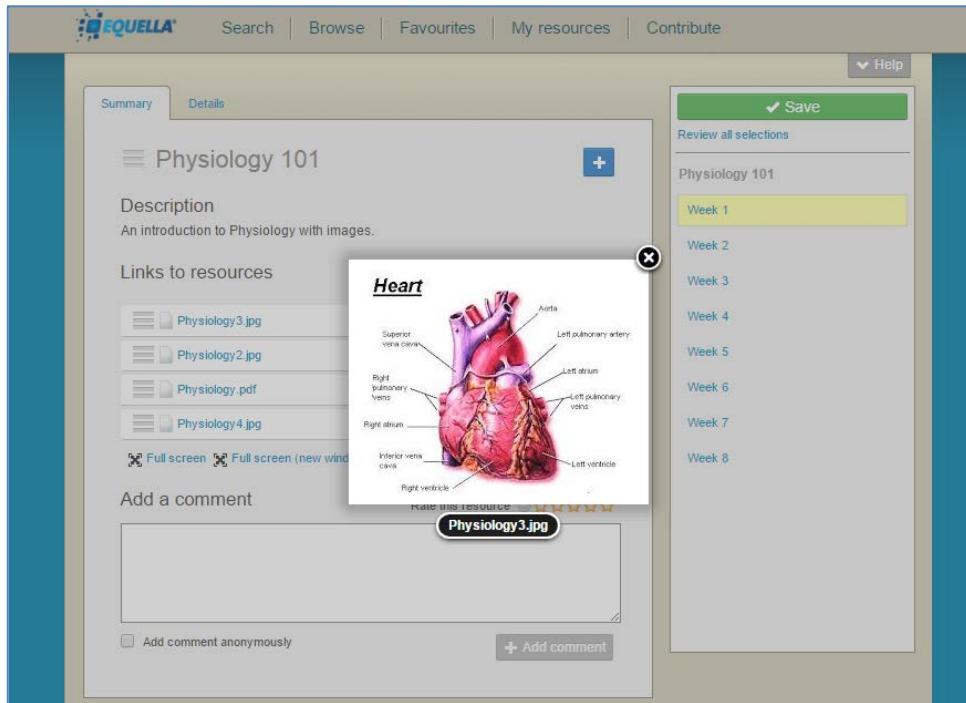


Figure 51 Attachment displayed in default viewer

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 52.

The screenshot shows the EQUELLA interface. On the left, there's a sidebar with a search bar and navigation links for 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'. The main area displays a resource titled 'Physiology 101' with a description: 'An introduction to Physiology with images.' Below this is a section for 'Links to resources' containing four attachments: 'Physiology3.jpg', 'Physiology2.jpg', 'Physiology.pdf', and 'Physiology4.jpg'. To the right of these attachments is a preview of 'Physiology3.jpg', which is a diagram of a heart. Below the preview, it says 'Type: Image', 'Filename: Physiology3.jpg', and 'Size: 8.98 KB'. There are also 'Full screen' and 'Full screen (new w...' buttons. Further down, there's a 'Add a comment' section with a text input field and a checkbox for 'Add comment anonymously'. At the bottom right of this section is a 'File viewer' button, which is highlighted with a red box. To the right of the main content area is a vertical sidebar with a 'Save' button at the top, followed by a list of weeks from 'Week 1' to 'Week 8', where 'Week 1' is highlighted with a yellow background.

Figure 52 Viewer options

2. Select a configured viewer (e.g. **Large image viewer**) to display the attachment. An example is shown in Figure 53.

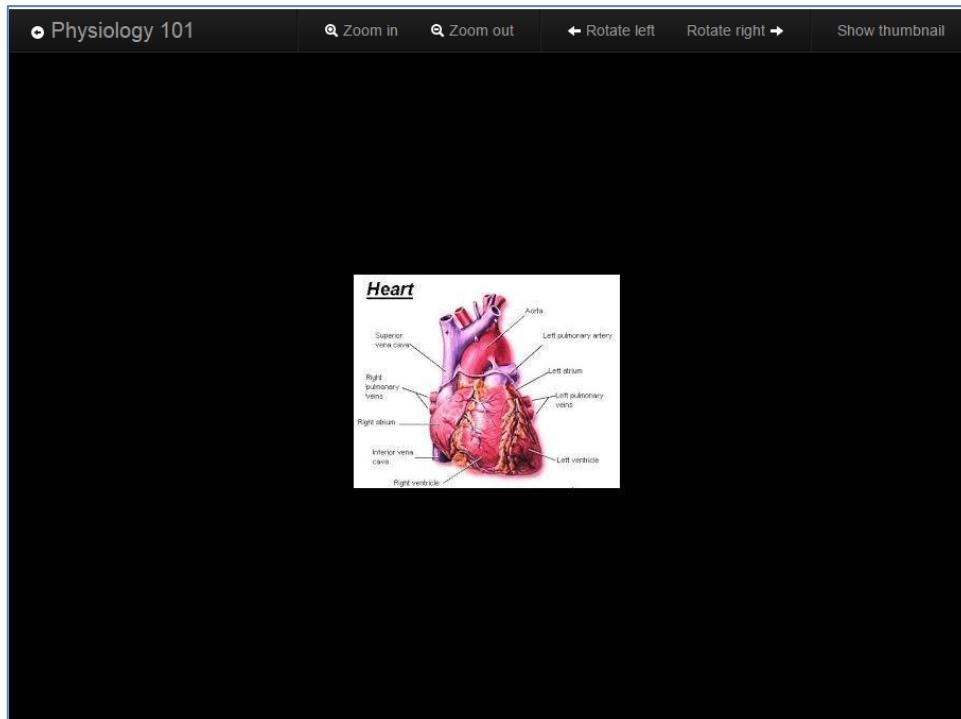


Figure 53 Attachment displayed in large image viewer

Further information is provided in the [Large image viewer](#) section on page 45.

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 54.

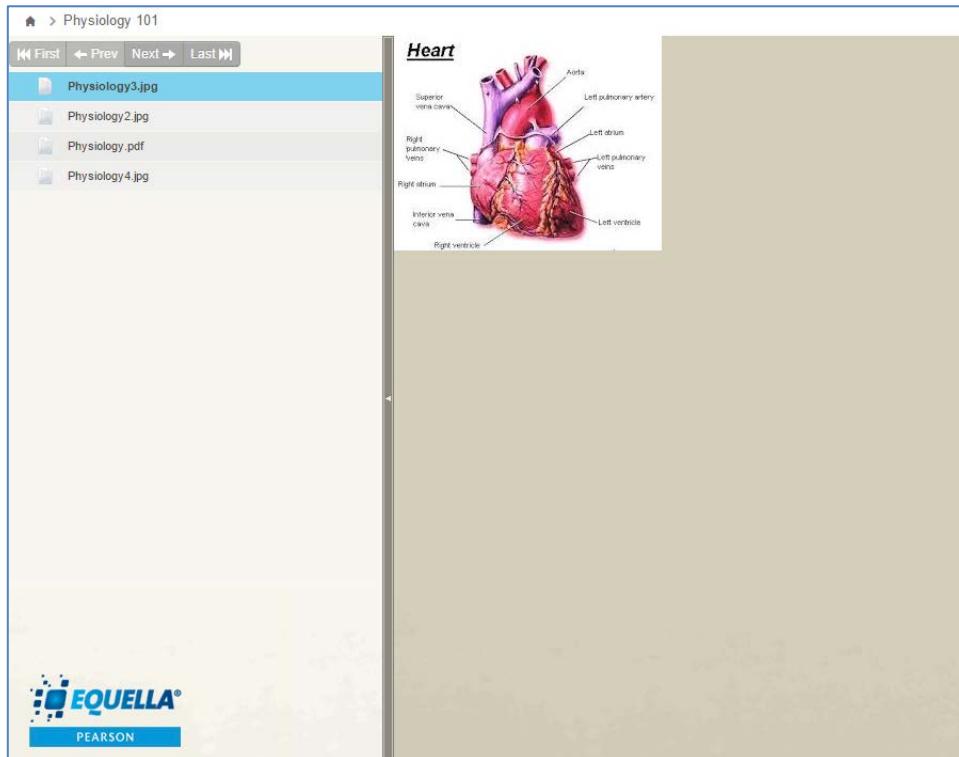


Figure 54 File viewer with packaged content

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 55.

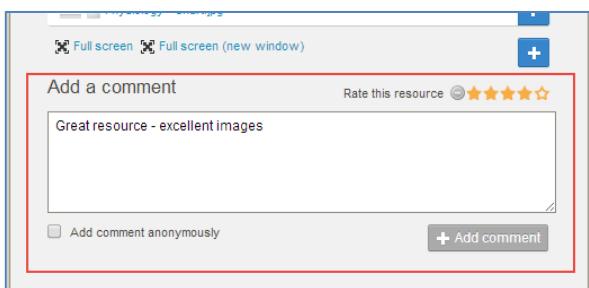


Figure 55 Add a comment section

3. Click **+ Add comment**.

To delete a comment

1. Select the icon that appears in the comment box alongside the comment, as shown in Figure 56.

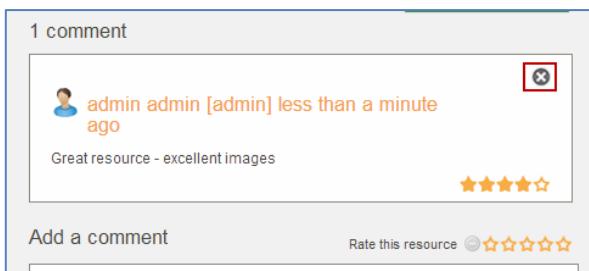


Figure 56 Delete comment

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 57.

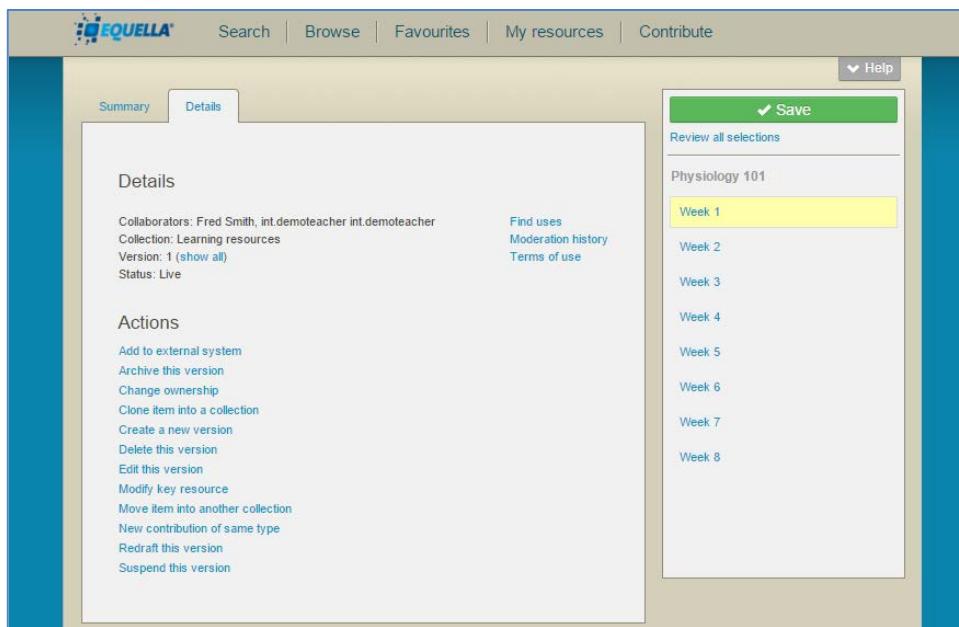


Figure 57 Integration Resource summary page - Details tab

The **Details** section can include:

- **Owner**—the user that created the resource.
- **Collaborators**—any users who have been added as collaborators for this resource. See [Change ownership](#) on page 47 for further information.
- **Collection**—the collection to which the resource belongs. Selecting the collection link displays a search result list for that collection.
- **Status**—resource statuses can be Live, Archived, Deleted, Suspended, Review, Moderating, Rejected or Draft.

NOTE: Only Live resources can be added to Canvas 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 42.
- **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 43.
- **Show moderation history**— select this link to display the **Moderation history** page. Refer to the [Moderation history page](#) section on page 44 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 58.

The screenshot shows a 'Details' page for a resource. At the top, there are 'Summary' and 'Details' tabs. Below the tabs, the word 'Details' is displayed. Underneath, it shows the owner is 'Administration User', it's in the 'Learning resources' collection, and its status is 'Live'. To the right, it says 'Version: 2 (show all)' with a 'Show moderation history' link. On the far right, there's a vertical sidebar with icons for 'Review', 'Science', 'General', '19', '26', and '24'. At the bottom left, there are 'Actions' links: 'Add to external system' and 'Archive this version'.

Figure 58 Version (show all) link

The **Versions of this item** page displays, listing all resource versions and their statuses. An example is shown in Figure 59.

The screenshot shows the 'Versions of this item' page. At the top, there are 'Summary' and 'Details' tabs. Below them, it says 'Versions of this item' and has a 'Back' button. A table lists two versions: Version 2 (Title: Physiology - images, Status: live) and Version 1 (Title: Physiology - images, Status: archived). To the right, there's a vertical sidebar with icons for 'Review', 'Science', 'General', '19', '26', and '24'.

Figure 59 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 59 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 60.

The screenshot shows the 'Terms of use' page for a resource titled 'Physiology 101'. At the top, there are tabs for 'Summary' and 'Details'. Below the tabs, the title 'Terms of use' is displayed. A section titled 'Licence agreement' contains text about the rights granted to end users. A list of terms follows, with a note that images may be used in demonstrations, trials, and pilot implementations. A 'Back' button is located at the bottom left of this section. To the right, a sidebar lists weeks from Week 1 to Week 8, with Week 1 highlighted in yellow. A green 'Save' button with a checkmark is at the top right. Below the 'Licence agreement' section, a table shows '6 users have accepted this licence' with columns for 'User' and 'Date'. The table lists six users and their acceptance dates.

User	Date
Documentation LTIUser	12 May 2015 4:26 PM
Beta2 Phase1	21 November 2013 4:53 PM
administrator administrator	14 May 2013 2:59 AM
Administration User	13 May 2013 10:07 PM
equellademo equellademo	18 April 2013 9:18 PM
EQUELLA Beta	7 February 2013 3:37 AM

Figure 60 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 61.

The screenshot shows the 'Moderation history' page for the same 'Physiology 101' resource. The page has 'Summary' and 'Details' tabs at the top. The main content area is titled 'Moderation history' and contains a table of events. The table has columns for 'Event', 'User', and 'Date'. It lists three events: 'Went live' (User: Unknown user, Date: 21 April 2012 2:38 AM), 'State changed to Archived' (User: Unknown user, Date: 21 April 2012 2:37 AM), and another 'Went live' (User: Unknown user, Date: 13 February 2009 1:32 AM). Below the table are three radio buttons for filtering: 'Basic details' (selected), 'Include edits', and 'Include all moderation details'. To the right, a sidebar shows weeks from Week 1 to Week 8, with Week 1 highlighted in yellow. A green 'Save' button with a checkmark is at the top right.

Event	User	Date
Went live	Unknown user	21 April 2012 2:38 AM
State changed to Archived	Unknown user	21 April 2012 2:37 AM
Went live	Unknown user	13 February 2009 1:32 AM

Figure 61 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, Blackboard and Canvas 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 modules within the selected connector.

To add a resource to an external system

1. Select the **Add to external system** link from the **Actions** menu.
2. Select the external system from the drop down list to which the resource is to be added. If only one external system is set up, the **Add to external system** screen displays immediately. An example is shown in Figure 62.

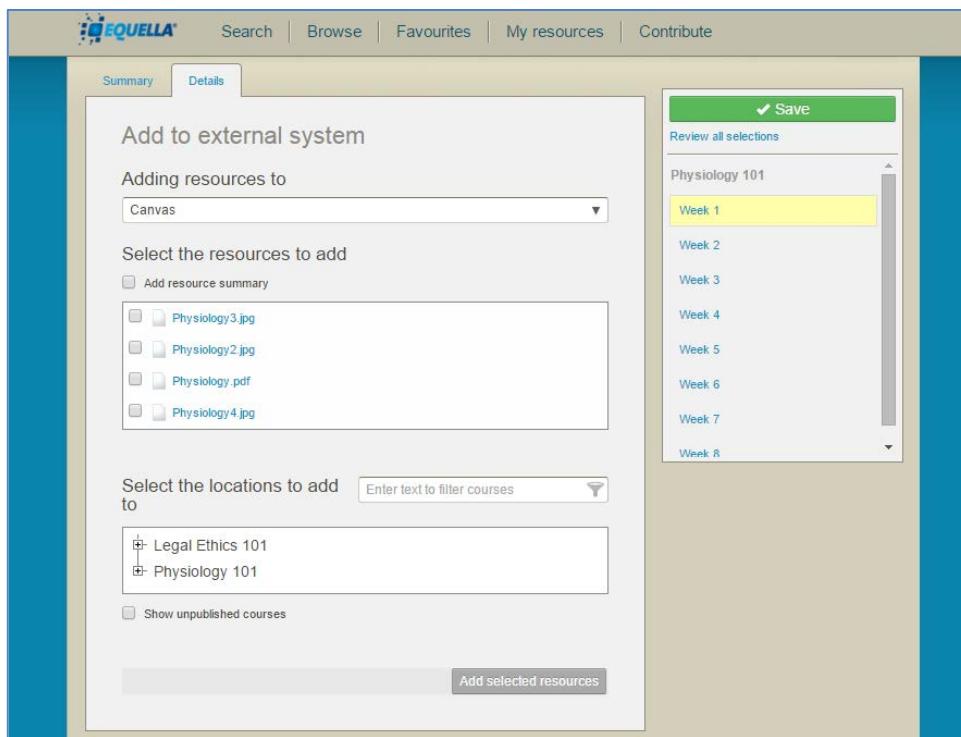


Figure 62 Add to external system

3. Select the required resources from the **Select the resources to add** section.
4. Click the **Show unpublished courses** checkbox to display any courses set as 'unpublished' in Canvas, use to expand courses to show their modules 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 modules to add to* pane.)
5. Select the module/s to which the resource should be added, then click **Add selected resources**.
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 63.

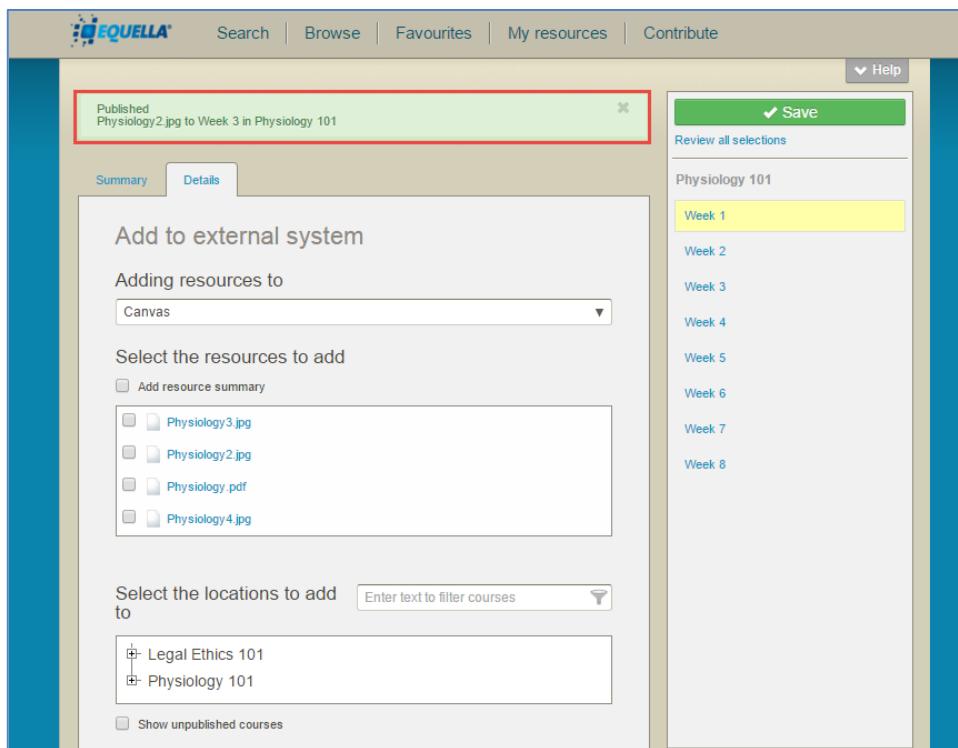


Figure 63 Successful addition of resource to Canvas module

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 64.

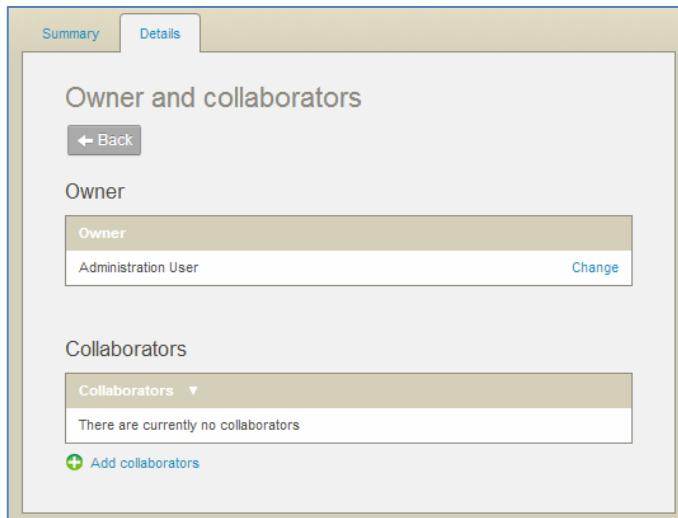


Figure 64 Owner and collaborators page

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 65.

A screenshot of the "Clone this item" page. The page has a header "Clone this item". Underneath, there is a "Select an operation" section with two radio buttons: "Clone" (selected) and "Clone without attachments". Below that is a "Select a collection" section with a dropdown menu showing "Teaching resources". Under "Select a schema transform (optional)", there is another dropdown menu showing "(None selected)". At the bottom right is a green "Clone" button with a checkmark icon.

Figure 65 Clone this item page

2. Select an option from the **Select an operation** section. There are two options:
 - **Clone**—copy the entire resource, including all attachments and metadata; or

- **Clone without attachments**—copy metadata without attachments.

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

To assign the cloned resource to a different collection

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

To apply an optional schema transform to the cloned resource

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

Create a new version

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

Delete this version

This action removes the resource from the repository and marks it for purging with the next purge scheduled task.

Edit this version

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

Export

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

Mark this for review

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

Modify key resource

Resources can be added or deleted as key resources to one or more hierarchy topics. See [Modify key resource](#) on page 26 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 66.

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 'Select a schema transform (optional)' with a dropdown menu showing 'OAI_DC'. At the bottom right is a green button labeled 'Move' with a checkmark icon.

Figure 66 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 67.

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.

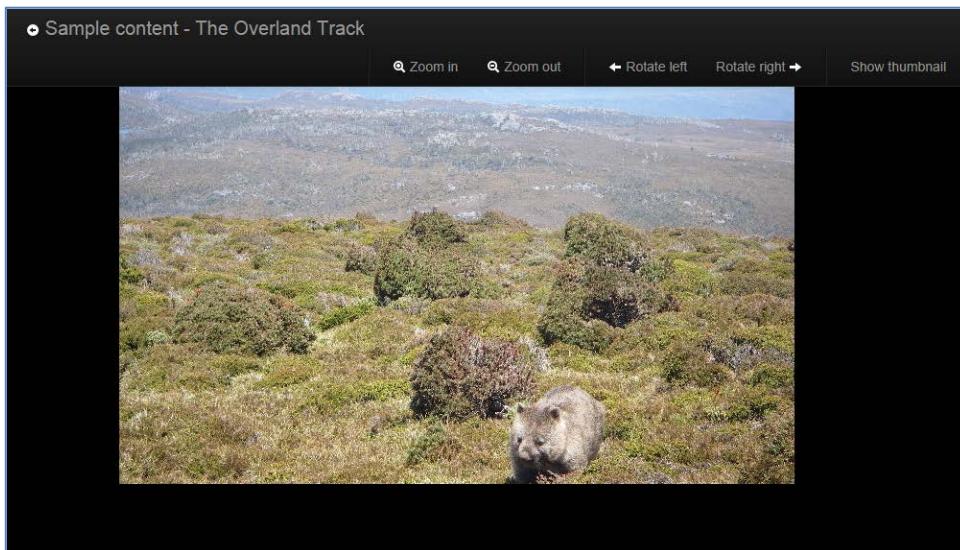


Figure 67 Large image viewer

LMS panel

The LMS panel displays the details of the integrated LMS course (in this case, Canvas) and course modules. An example is shown in Figure 68.



Figure 68 LMS (Canvas) 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 Canvas course modules.
- **Review all selections** link – see [To view and edit all selections in a selection session on page 60](#).

The bottom section displays the Canvas Course title and the course modules.

NOTE: The first Canvas course module is highlighted and bolded in the LMS panel as a default.

Resources can be selected and added to any course module. See [Select and add resources to a course](#) on page 52.

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 module.

Clicking the select button will add the selected attachment or summary page to the currently highlighted course module. There are a number of ways to make selections for course modules, 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 69.

The screenshot shows the EQUELLA interface. At the top, there is a navigation bar with links for Search, Browse, Favourites, My resources, and Contribute. On the right side, there are Help and Screen options buttons. A sidebar on the right lists weeks from Week 1 to Week 8, with Week 1 highlighted. The main content area displays search results for 'Physiology 101'. The first result is 'Physiology 101', described as 'An introduction to Physiology with images.' It shows a thumbnail of a heart diagram and has a 'Select summary page' button. Below it is another result, 'Introduction to EQUELLA', with a thumbnail of a document and a similar 'Select summary page' button. The interface includes standard search filters like Sort, Filter, and Share.

Figure 69 Select summary page button on result page

An example on the Resource summary page is shown in Figure 70.

The screenshot shows the EQUELLA interface. On the left, there's a summary card for a resource titled "Physiology 101". The card includes sections for "Description" (an introduction to Physiology with images), "Links to resources" (with attachments for "Physiology3.jpg", "Physiology2.jpg", "Physiology.pdf", and "Physiology4.jpg"), and "Add a comment". A red box highlights the blue "Select summary page" button located at the top right of the card. On the right, a sidebar shows a list of weeks from Week 1 to Week 8, with Week 1 highlighted in yellow. At the top of the sidebar is a green "Save" button.

Figure 70 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 Canvas course module.

Select all attachments

The **Select all attachments** button displays above the attachments list. An example is shown in Figure 71.

This screenshot is similar to Figure 70, showing the EQUELLA interface with the "Physiology 101" resource summary card. The "Select all attachments" button is highlighted with a red box. The sidebar on the right shows the weeks from Week 1 to Week 8, with Week 1 highlighted in yellow. The green "Save" button is also visible at the top of the sidebar.

Figure 71 Resource summary page - Select all attachments button

When this button is selected, a single link for each attachment is added to the highlighted Canvas course module. An example is shown in Figure 72.

The screenshot shows a Canvas course interface for 'Physiology 101'. On the left, a sidebar lists various course sections like Home, Announcements, Assignments, etc. The main area displays 'Week 1' with four attachments: 'Physiology4.jpg', 'Physiology2.jpg', 'Physiology.pdf', and 'Physiology3.jpg'. A red box highlights these attachments. At the top right, there are 'View Progress' and '+ Module' buttons. Below the attachments are 'Week 2' and 'Week 3' sections with their own attachment lists.

Figure 72 Canvas course module 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 beneath the attachments list. An example is shown in Figure 73.

The screenshot shows a Resource summary page for 'Physiology 101' in EQUELLA. The left panel shows a summary of the resource, including its title, description, and a list of attachments: 'Physiology3.jpg', 'Physiology2.jpg', 'Physiology.pdf', and 'Physiology4.jpg'. Below this is a 'Select package' button. The right panel shows a list of weeks from 'Week 1' to 'Week 8', with 'Week 2' highlighted. A green bar at the top indicates a successful save operation.

Figure 73 Resource summary page - Select package button

When this button is selected, a single link for all the attachments is added to the highlighted Canvas course module. An example is shown in Figure 74.

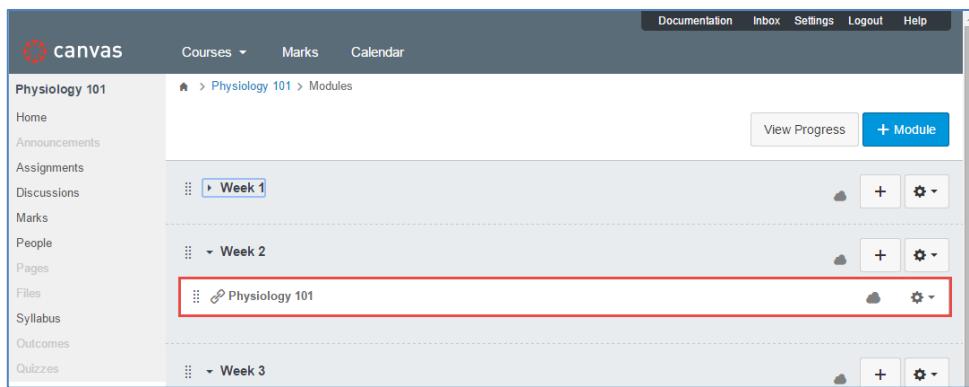


Figure 74 Canvas course module with single link for all attachments

Clicking on the link opens the attachments in the package viewer. An example is shown in Figure 75.

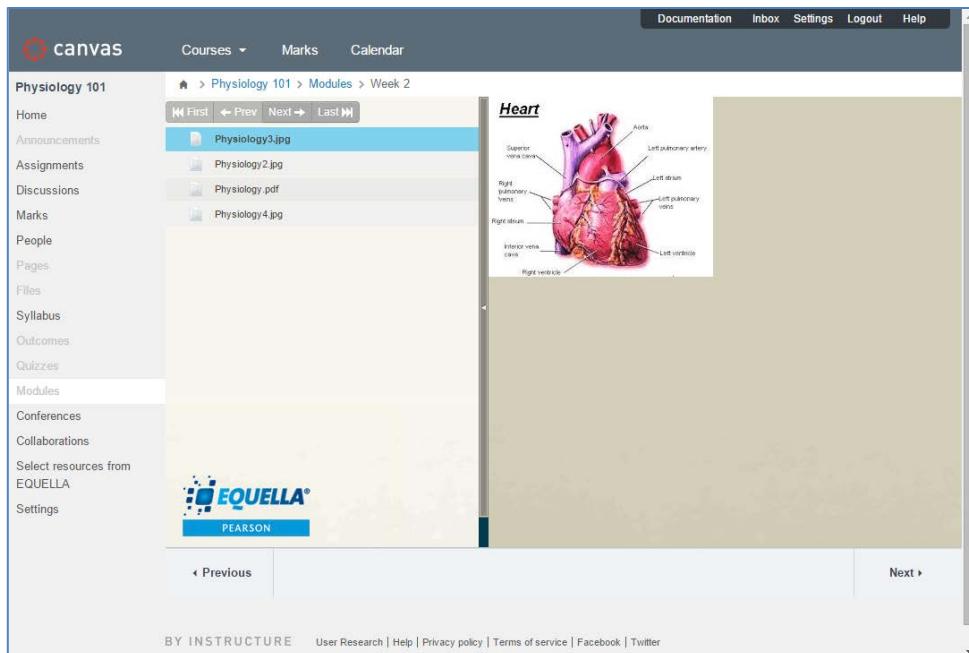


Figure 75 Package link - opens the package viewer where all attachments can be viewed

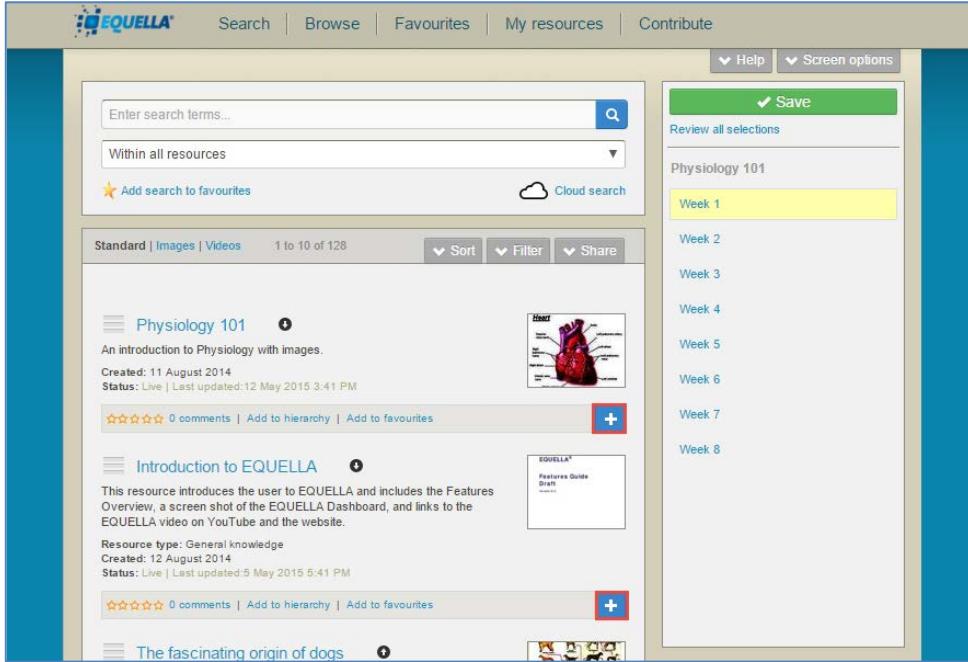
Selecting items

Selection using buttons

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

1. Check that the required course module is currently highlighted in the LMS panel. To highlight an alternative module, click beside the module name.
2. Click **+** beside the required attachment/s, summary pages or packages to add them to the highlighted course module.

- **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 53 for further information). An example from the results page is shown in Figure 76.



The screenshot shows the EQUELLA search interface. At the top, there's a navigation bar with 'Search', 'Browse', 'Favourites', 'My resources', and 'Contribute'. Below the search bar, there's a search form with fields for 'Enter search terms...' and 'Within all resources'. The main area displays three resource cards:

- Physiology 101**: An introduction to Physiology with images. Created: 11 August 2014. Status: Live | Last updated: 12 May 2015 3:41 PM. It has a 5-star rating and links to a thumbnail image of a heart.
- 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: 12 August 2014. Status: Live | Last updated: 5 May 2015 5:41 PM. It has a 5-star rating and links to a thumbnail image of a computer screen.
- The fascinating origin of dogs**: A resource card with a 5-star rating and links to a thumbnail image of a dog.

To the right, a sidebar for 'Physiology 101' is open, showing a list of weeks: Week 1 (highlighted in yellow), Week 2, Week 3, Week 4, Week 5, Week 6, Week 7, and Week 8. At the top of the sidebar, there are 'Help' and 'Screen options' buttons, and a 'Save' button with a checkmark.

Figure 76 Selecting summary page from search results page

- **Single attachments** can be selected from the results page by clicking the  icon to open the attachment display or by opening the summary page, then clicking the  button/s beside the relevant attachments. An example from the results page is shown in Figure 77.

Figure 77 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 54 for further information). An example is shown in Figure 78.

Figure 78 Selecting 'All attachments' button from the summary page

- **Select package** (showing as a single link that displays as a package in the course) can be selected by opening the summary page, then clicking the **+** button

underneath the attachment list (see [Select package](#) on page 55 for further information). An example is shown in Figure 79.

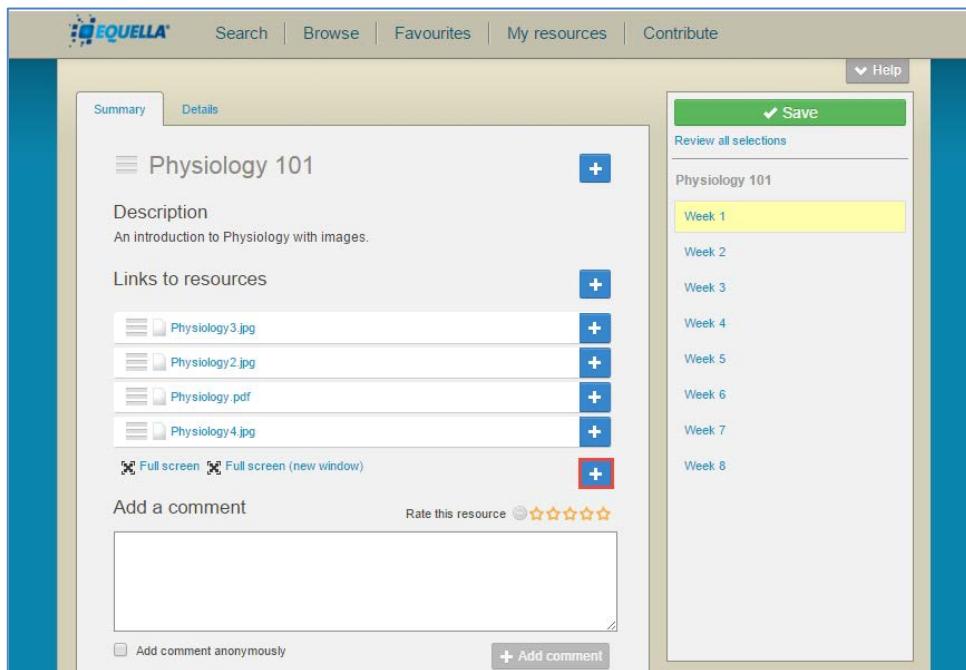


Figure 79 Selecting package from summary page

Selection using drag and drop

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

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 module.

NOTE: The user can drag to any course module, 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 module as items are selected. An example is shown in Figure 80.



Figure 80 Item count

To view and edit the items selected for one course module

1. Click the required course module list (e.g. Week 3). The **Edit resource selections** dialog displays. An example is shown in Figure 81.

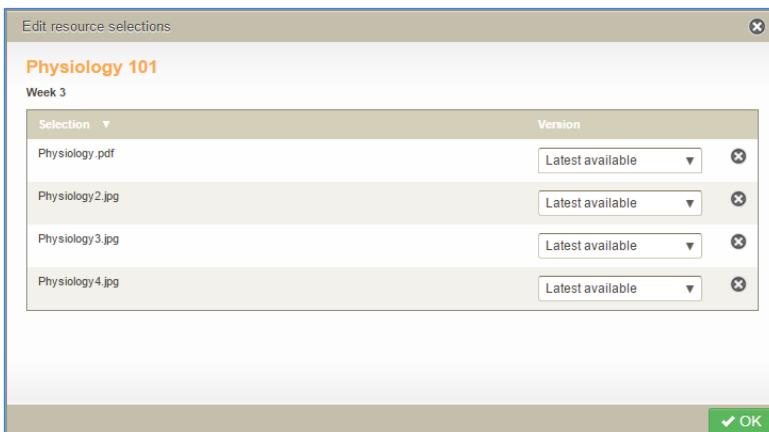


Figure 81 Edit resource selections

- 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 82.



Figure 82 Review all selections link

The **Edit resource selections** dialog displays, showing all course modules where selections have been added. An example is shown in Figure 83.

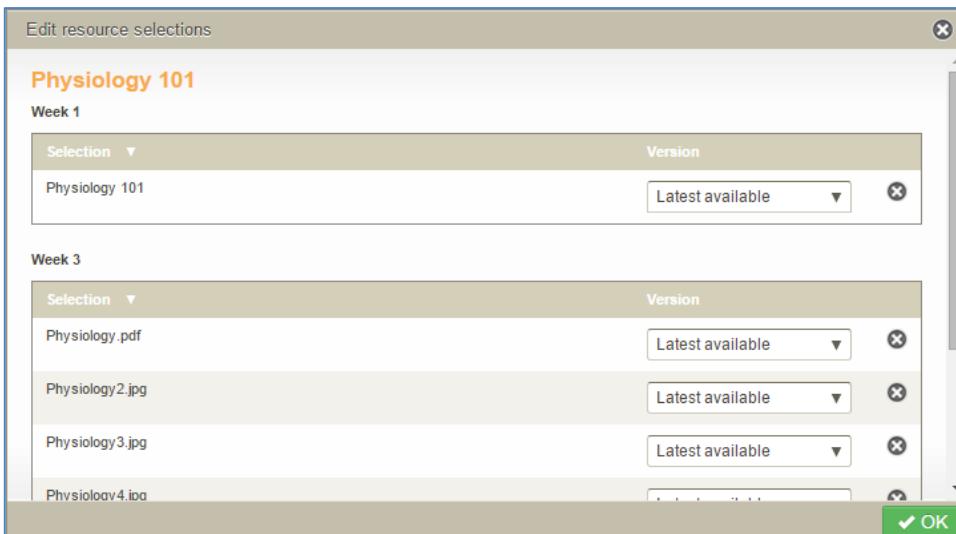


Figure 83 Edit resource selections - multiple course modules

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

To save selections

- Once all selections have been made for a selection session, click  to add the selections to the course modules.
- Go to Modules from the course navigation menu to view the added resource links. An example is shown in Figure 84.

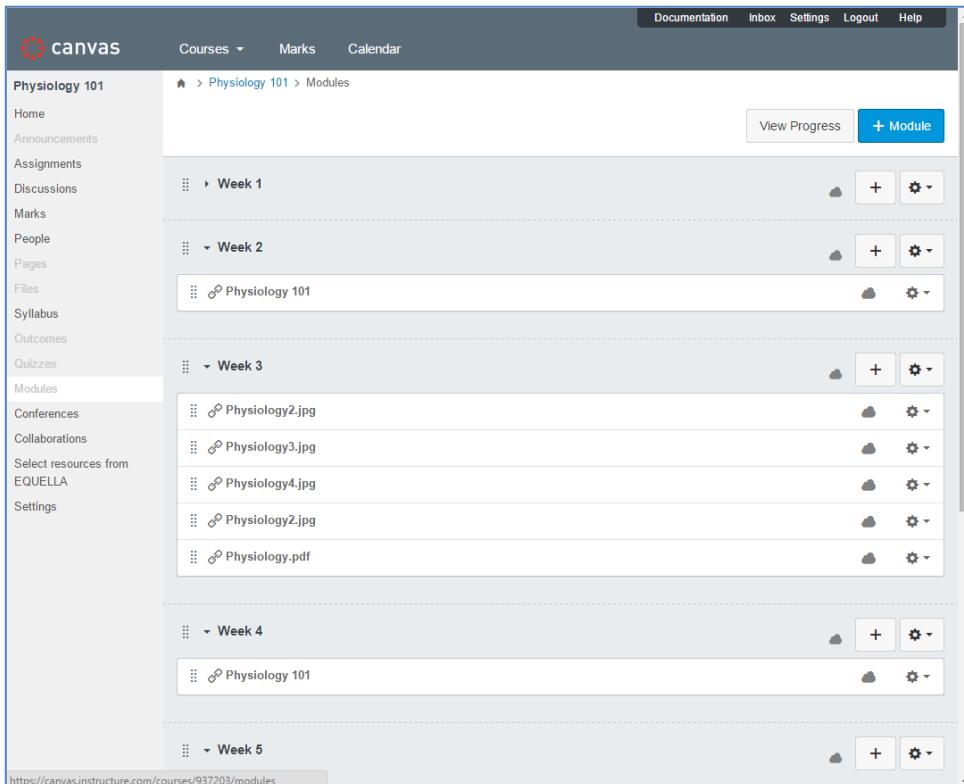


Figure 84 Canvas course page with new links

Adding EQUELLA resources from within a Canvas module

EQUELLA resources can be added to a Canvas course module from the module itself. Using this method allows the user to add a single EQUELLA resource at a time, and that resource will be added to the course module the EQUELLA Select screen was accessed from.

To add an EQUELLA resource to a module

- Select **Modules** from the course navigation menu. A list of course modules display on the screen.
- Click the  button beside the module the resource is to be added to. An example is shown in Figure 85.

The screenshot shows the Canvas course interface for Physiology 101. The left sidebar lists various course sections like Home, Announcements, Assignments, Discussions, Marks, People, Pages, Files, Syllabus, Outcomes, Quizzes, and Modules. The 'Modules' link is highlighted with a red box and has a circled '1' above it. The main content area displays a module structure for weeks 1 through 5. Week 2 is currently selected, showing a module titled 'Physiology 101' with a red box and a circled '2' above its plus sign icon, indicating it can be added.

Figure 85 Canvas course Modules page

The **Add item to Module name** dialog opens.

3. Select **External Tool** from the **Add** drop-down list. An example is shown in Figure 86.

The screenshot shows the 'Add Item to Module name' dialog for the Ethics101 course. The 'Add' dropdown menu is open, showing options like Assignment, Quiz, File, Content Page, Discussion, Text Header, External URL, and External Tool. The 'External Tool' option is highlighted with a red box and has a circled '1' above it. The dialog also includes a text input field for the item name ('Propose solutions to ethical issues and apply ethical study practice.') and an 'Indentation' dropdown set to 'Don't Indent'. At the bottom are 'Cancel' and 'Add Item' buttons.

Figure 86 'Add Item to Module name' dialog

A list of available external tools displays. An example is shown in Figure 87.

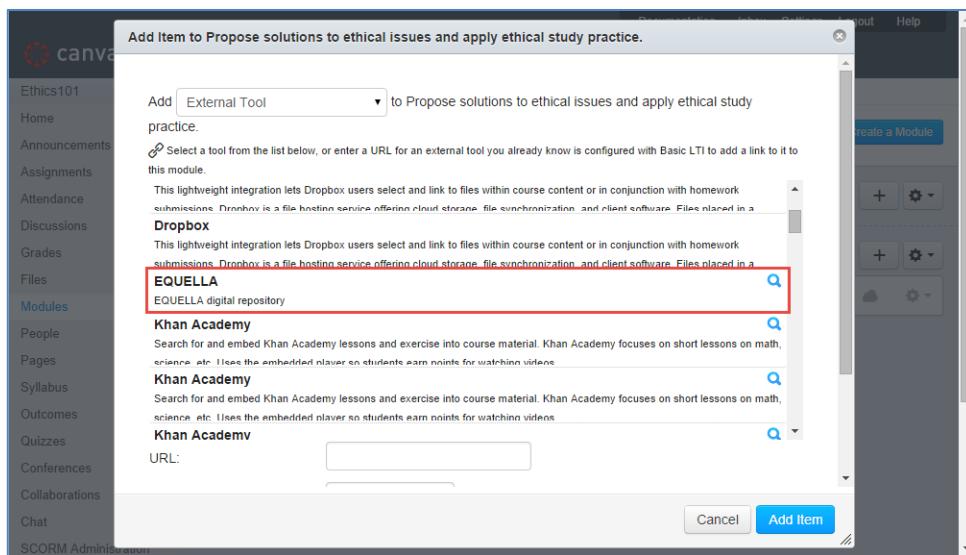


Figure 87 External tools list

- Locate and select **EQUILLA** from the list. The EQUILLA Select page displays. An example is shown in Figure 88.

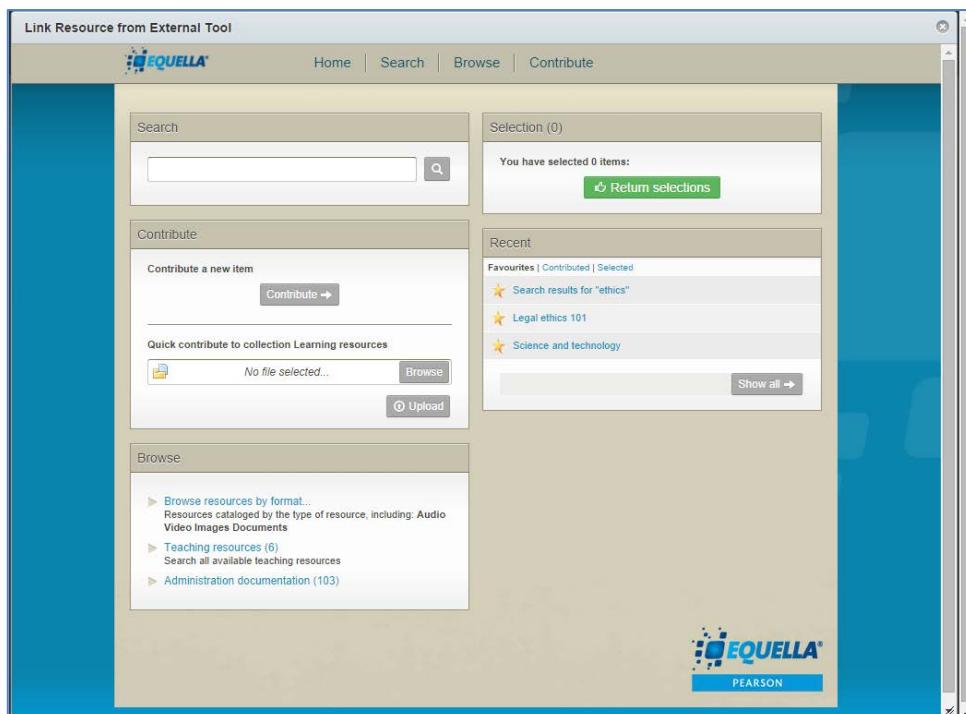


Figure 88 EQUILLA Select screen

The **Select** screen has the following links at the top of the page:

Home – click to return to the home page, as seen in Figure 96.

Search – click to open the standard EQUILLA Search page.

Browse – click to browse results from hierarchy topics and sub-topics.

Contribute – click to contribute a new resource to EQUILLA.

5. Select the required item using the select buttons (see [Selecting items](#) on page 56 for further information).

NOTE: Selection is restricted to one item per selection session.

The **My selections** dialog displays. An example is shown in Figure 89.

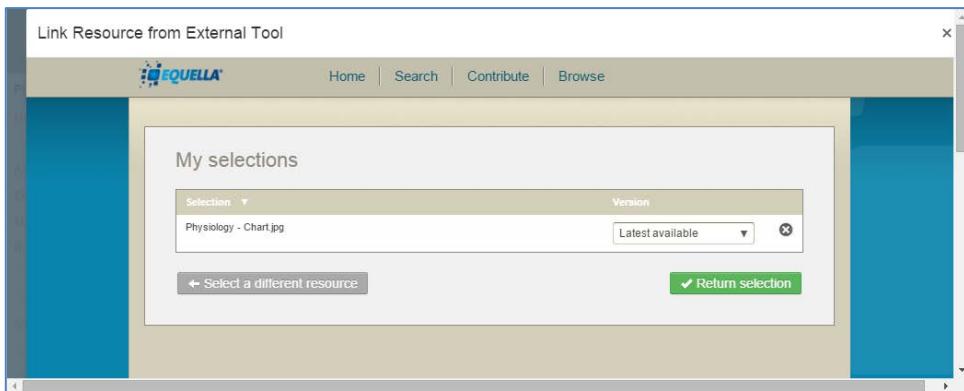


Figure 89 My selections dialog

Select the required version option (if applicable).

Click to remove the selection.

Click to swap the selected resource to a different one.

6. Click . The **Add item to Module name** dialog displays as shown in Figure 86.

7. Click . The resource link is added to the Canvas module. An example is shown in Figure 90

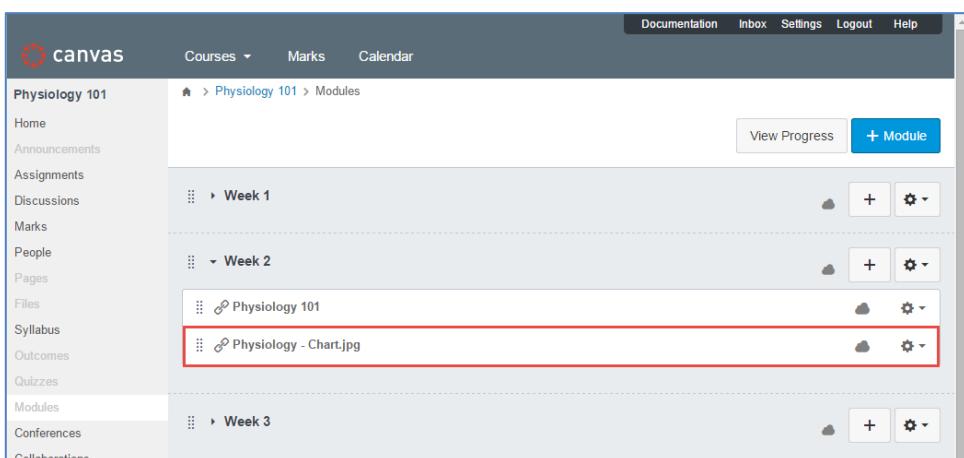


Figure 90 Course module with resource link added

Managing resources in Canvas

Resources added to Canvas module can be managed in the following ways:

- Click on the icon to the left of the link to drag the link either to a different location within the current module, or to another module within the current course.

- Click the  icon to 'publish' an item. This changes the status from 'draft' to 'published' within the course module. Click the same icon to 'unpublish' a published item.

From the **Edit** menu:

- Select **Increase indent** to indent the item within the module.
- Select **Edit** to open the **Edit Item Details** dialog. An example is shown in Figure 91.

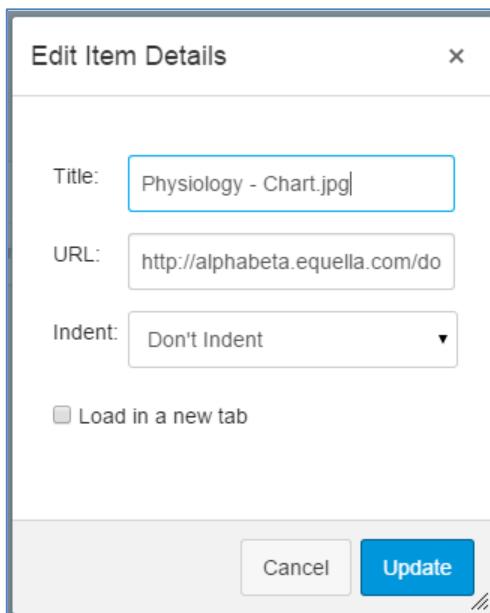


Figure 91 Edit Item Details dialog

The **Title**, **URL** and **Indent** options can all be edited. Select the **Load in a new tab** checkbox to open the item in a separate tab.

- Select **Remove** to delete an item from the course module

To view a resource

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

The screenshot shows the Canvas interface for a course titled 'Physiology 101'. The left sidebar contains navigation links such as Home, Announcements, Assignments, Discussions, Marks, People, Pages, Files, Syllabus, Outcomes, Quizzes, Modules (which is selected), Conferences, Collaborations, Select resources from EQUELLA, and Settings. The main content area displays a resource titled 'Physiology 101' with a description: 'An introduction to Physiology with images.' Below the description is a section titled 'Links to resources' containing four image thumbnails labeled 'Physiology 3.jpg', 'Physiology 2.jpg', 'Physiology pdf', and 'Physiology 4.jpg'. There are also 'Full screen' and 'Reorder attachments' buttons. A comment input field is present with a 'Rate this resource' button and a five-star rating. On the right side, there is a sidebar with 'Add to favourites' and 'Details' sections, which include information like 'Collection: Learning resources', 'Version: 1 (show all)', 'Status: Live', and 'Find uses'. A large 'Actions' section lists various options: Add to external system, Archive this version, Change ownership, Clone item into a collection, Create a new version, Delete this version, Edit this version, Modify key resource, Move item into another collection, New contribution of same type, Redraft this version, and Suspend this version.

Figure 92 Resource summary page

Adding EQUELLA resources to the Canvas HTML editors

The EQUELLA repository can be used as a search destination for content-creation functionality within Canvas. Images (and other resources) from EQUELLA can be added using Canvas's HTML editor.

To add EQUELLA content to the Canvas HTML editor

(Note: *EQUELLA content can be accessed from any of the Canvas HTML editors. These HTML editors exist in a number of places in Canvas, and this guide will refer to just one of those.*)

1. On the Canvas Course page, select **Assignments** from the navigation menu, then click **+ Assignment**. An example is shown in Figure 93.

The screenshot shows the Canvas course interface for 'Physiology 101'. The left sidebar has 'Assignments' selected and highlighted with a red box. The main content area shows a list of assignments under the heading 'Assignments'. One assignment, 'Study of toad anato...', is listed with a small icon and a gear icon for settings. At the top right of the main area, there are buttons for '+ Group', '+ Assignment' (which is also highlighted with a red box), and a gear icon.

Figure 93 Canvas course page

The **Create new assignment** page displays with the HTML Editor An example is shown in Figure 94.

The screenshot shows the 'Create new assignment' page in Canvas. The left sidebar includes 'Assignments' under the 'Courses' dropdown. The main area has 'Assignment Name' input field, an 'HTML Editor' toolbar with various formatting options, and a large text editor area. On the right, there's a sidebar titled 'Insert Content into the Page' with tabs for 'Links', 'Files', and 'Images', and a section for 'Wiki Pages'. Below that is a sidebar with links to 'Assignments', 'Quizzes', 'Announcements', 'Discussions', 'Modules', and 'Course Navigation'. At the bottom, there's a 'Points' input field set to '0'.

Figure 94 Create new assignment page

2. Select the  icon (EQUELLA) from the HTML editor toolbar. An example is shown in Figure 95.

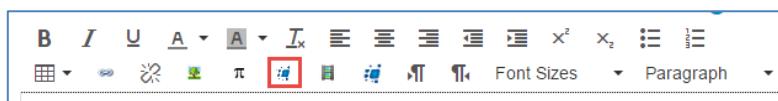


Figure 95 Canvas course page—Editing settings

NOTE: The second, larger  icon (Insert EQUELLA links) has been added by Canvas, and does not link to the integrated EQUELLA instance. It opens the OER repository. The same OER content can be accessed via Cloud search results from the integrated EQUELLA.

The **EQUELLA Select** screen displays. An example is shown in Figure 96.

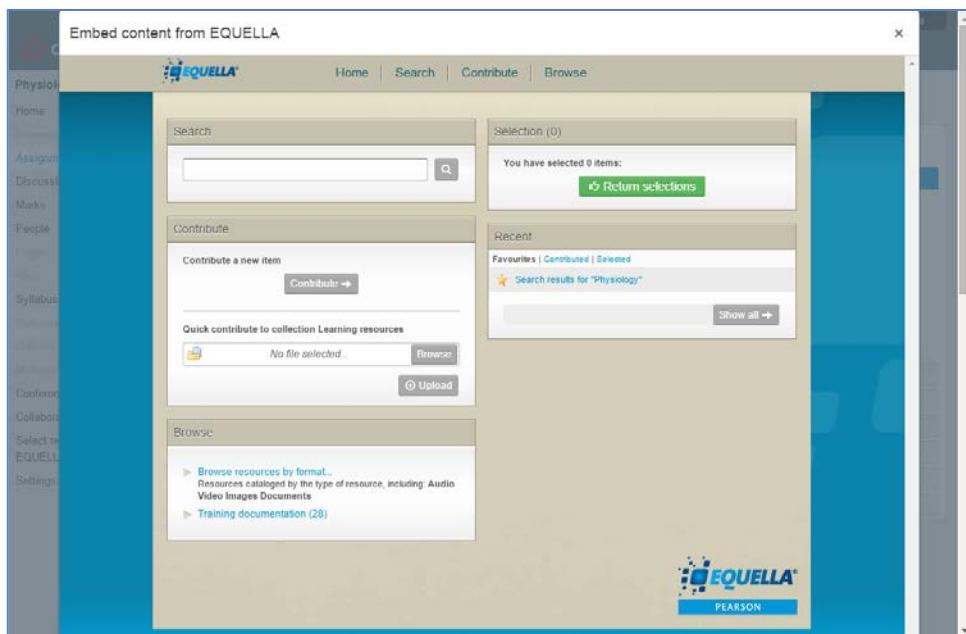


Figure 96 EQUELLA Select screen

The **Select** screen has the following links at the top of the page:

Home – click to return to the home page, as seen in Figure 96.

Search – click to open the standard EQUELLA Search page.

Browse – click to browse results from hierarchy topics and sub-topics.

Contribute – click to contribute a new resource to EQUELLA.

3. Select the required item using the select buttons (see [Selecting items](#) on page 56 for further information).

NOTE: Selection is restricted to one item per selection session.

The **My selections** dialog displays. An example is shown in Figure 97.

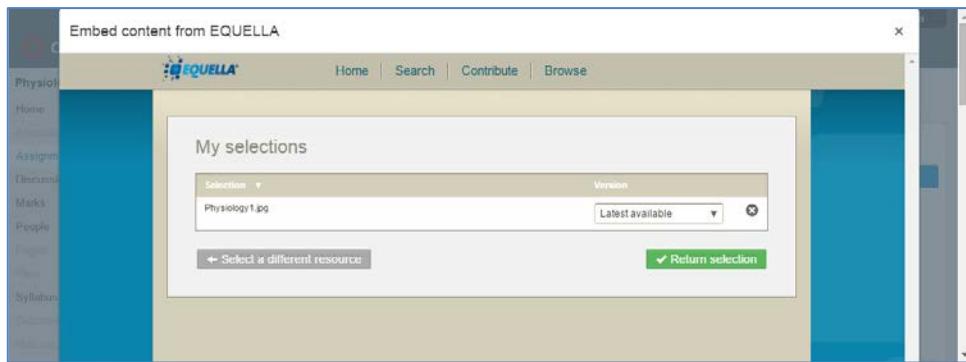


Figure 97 My selections dialog

Select the required version option (if applicable).

Click to remove the selection.

Click **Select a different resource** to swap the selected resource to a different one.

4. Click **✓ Return selection**. The selection displays in the HTML Editor. An example is shown in Figure 98.

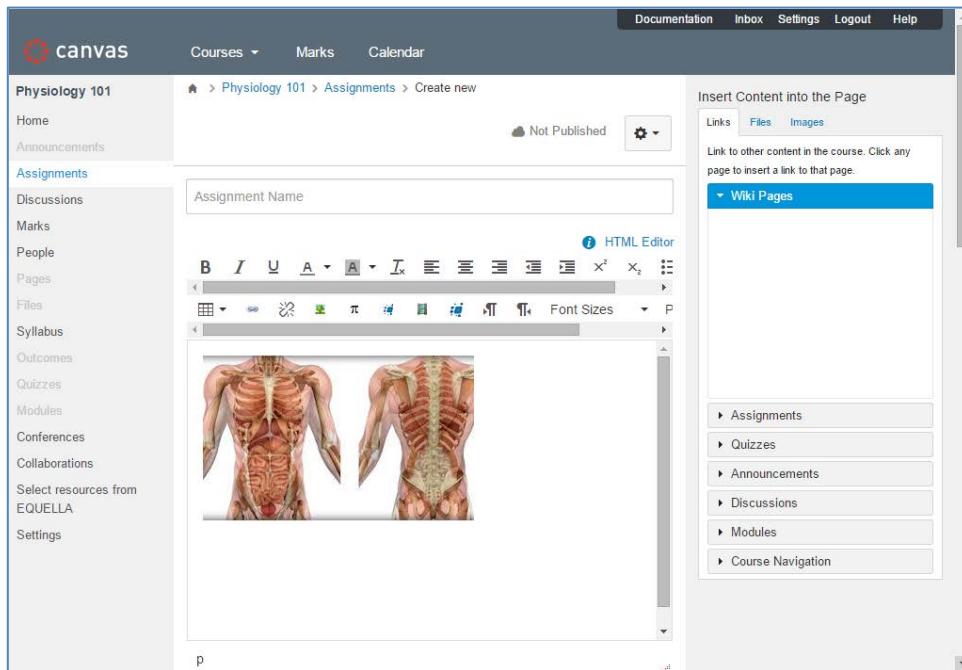


Figure 98 Embedded EQUELLA resource

Push to LMS (Add to external system)

EQUELLA content can be added to Canvas course modules using the **Add to external system** function accessed from the Resource summary page *Actions* menu in native EQUELLA.

For further information, see [Add to external system](#) on page 45.

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>.