

# EQUELLA®

## Store User Guide

*Version 6.0*

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# Store overview

The EQUELLA Content Exchange enables institutions to set up their EQUELLA instance as a Store, a Store front or both.

An EQUELLA system can be configured as a Store front for the purpose of registering with EQUELLA Stores to access available catalogues and purchase content.

Content can be added to a shopping cart and paid for using a payment gateway. Basic workflow rules can be implemented to allow for different users to create, approve and pay for orders. Once a resource is paid for, it is harvested from the Store to the Store front and added to a predefined collection. See the *EQUELLA Store Front User Guide* for further information.

EQUELLA instances set up as Stores make content available for purchase to registered EQUELLA store fronts via Store catalogues. Catalogues are created and resources are priced (based on a number of available pricing models) and allocated to relevant catalogues. The catalogues are then browsed at an EQUELLA Store front, and users can select and purchase desired content.

Configuring EQUELLA as a store involves setting up Store details and images which display at a store front (where the purchase transaction takes place), creating catalogues containing resources that will be available for purchase or subscription and configuring pricing tier details.

One or more payment gateways are configured, and once payment has been completed at the store front, the purchased resources are harvested from the store to the store front.

The purpose of this guide is to provide system administrators with an understanding of the EQUELLA Store functionality and the configuration required to successfully set up an EQUELLA Store. It also provides instruction to the users involved in the creation and maintenance of catalogues and pricing of catalogue resources.

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## Prerequisites

### **Licence addendum**

An EQUELLA licence addendum is required to have access to the store functionality outlined in this guide. Please contact [support@equella.com](mailto:support@equella.com) for further information.

### **Store front registrations**

A process outside of the EQUELLA system is required to acquire the mandatory registration information from store fronts wishing to access store catalogues. The information is required for successful store front registration:

- **Requested Transactions** (*Free, Outright purchase, Subscription*) - depending on what pricing models the store is using
- **Sales tax** – any sales taxes valid for the store front
- **Application** – (e.g. *EQUELLA*). In future releases, other applications may be able to register with an EQUELLA store.
- **Version** – the application version (e.g. *6.0 GA*)
- **Country** – the country in which the store front is based. This is used for region restrictions, if applicable.
- **Contact no.** – a contact number or email for the store front.

Additionally, a unique **EQUELLA User** (with no permissions) must be created at the Store for each Store front registration. See [Store front registrations](#) on page 29 for further information.

## SSL

At a minimum, the EQUELLA Store REST API endpoints must be run in an SSL ([https](https://)) environment. Alternatively, it is recommended that the EQUELLA store instance as a whole should run in an SSL ([https](https://)) environment.

## Store privileges

The following privileges have been introduced as part of the Store functionality. See the *EQUELLA 6.0 Security Administration Guide* for further information.

- **CREATE\_CATALOGUE** - enables the creation of new Store catalogues. This privilege can be granted at an institution level or on the Catalogue object.
- **EDIT\_CATALOGUE** - enables the editing of Store catalogues. This privilege can be granted at an institution level or catalogue level.
- **DELETE\_CATALOGUE** - enables the deleting of Store catalogues. This privilege can be granted at an institution level or catalogue level.
- **MANAGE\_CATALOGUE** - allows users to access the **Add to catalogue** and **Exclude from catalogue** functions, as well as access to catalogue resource filtering via Manage resources and catalogue related bulk actions. This privilege can be granted at an institution or catalogue level.
- **CREATE\_PAYMENT\_GATEWAY** - enables the creation of new Payment gateways. This privilege can be granted at an institution level or on the Payment gateway object.
- **EDIT\_PAYMENT\_GATEWAY** - enables the editing of Payment gateways. This privilege can be granted at an institution or Payment gateway level.
- **DELETE\_PAYMENT\_GATEWAY** - enables the deleting of Payment gateways. This privilege can be granted at an institution level or payment gateway level.
- **CREATE\_REGION** - enables the creation of new Regions. This privilege can be granted at an institution level or on the Regions object.
- **EDIT\_REGION** – enables the editing of Regions. This privilege can be granted at an institution or region level.

- **DELETE\_REGION** - enables the deleting of Regions. This privilege can be granted at an institution level or region level.
- **CREATE\_STOREFRONT** - enables the creation of new Store front registrations. This privilege can be granted at an institution level or on the Store front object.
- **EDIT\_STOREFRONT** - enables the editing of Store front registrations. This privilege can be granted at an institution or store front level.
- **DELETE\_STOREFRONT** - enables the deleting of Store front registrations. This privilege can be granted at an institution level or store front level.
- **CREATE\_TAX** - enables the creation of new Store taxes. This privilege can be granted at an institution level or on the store tax object.
- **EDIT\_TAX** - enables the editing of Store taxes. This privilege can be granted at an institution or the store tax level.
- **DELETE\_TAX** - enables the deleting of Store taxes. This privilege can be granted at an institution level or store tax level.
- **CREATE\_TIER** - enables the creation of new Pricing tiers. This privilege can be granted at an institution level or on the Tiers object.
- **EDIT\_TIER** - enables the editing of Pricing tiers. This privilege can be granted at an institution or Pricing tier level.
- **DELETE\_TIER** - enables the deleting of Pricing tiers. This privilege can be granted at an institution level or pricing tier level.
- **SET\_TIER\_FOR\_ITEM** - allows a pricing tier to be set for a resource or group of resources. This privilege can be granted at an institution, collection, resource or resource metadata level.
- **VIEW\_SALES\_FOR\_ITEM** - allows users to view the sales history for a resource. This privilege can be granted at an institution, collection, resource or resource metadata level.
- **VIEW\_TIERS\_FOR\_ITEM** - allows users to view the current pricing tiers set for resources from the resource summary page and the search results page. This privilege can be granted at an institution, collection, resource or resource metadata level.

## Store settings

A number of store settings must be configured before a store can begin trading. See Figure 1.

## Settings, Store

### Store setup

Enable store functionality and set Store name, images and contact details.

### Regions

Create regions, if required.

### Catalogues

Create and maintain catalogues, including names, associated dynamic collection and region settings.

### Pricing tiers

Configure pricing tiers for outright purchases and/or subscriptions.

### Payment gateways

Configure payment gateways (Google Checkout or PayPal).

### Store taxes

Configure sales taxes

### Store front registrations

Register new store front registrations, and view, edit or disable existing. Details include OAuth settings.

**Figure 1** Store settings

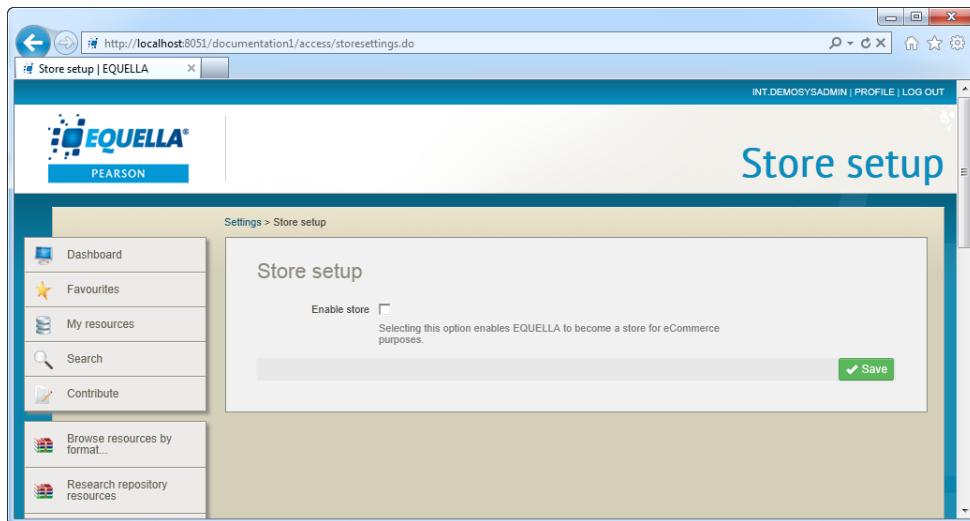
## *Store setup*

The **Store setup** setting enables Store functionality and allows a store name, description and images to be configured for the store. This information is displayed in a number of places on the Store front.

Store contact details are also entered here. These contact details also display at the store front, allowing store front users to view the contact information for the store in case of enquiries or problems.

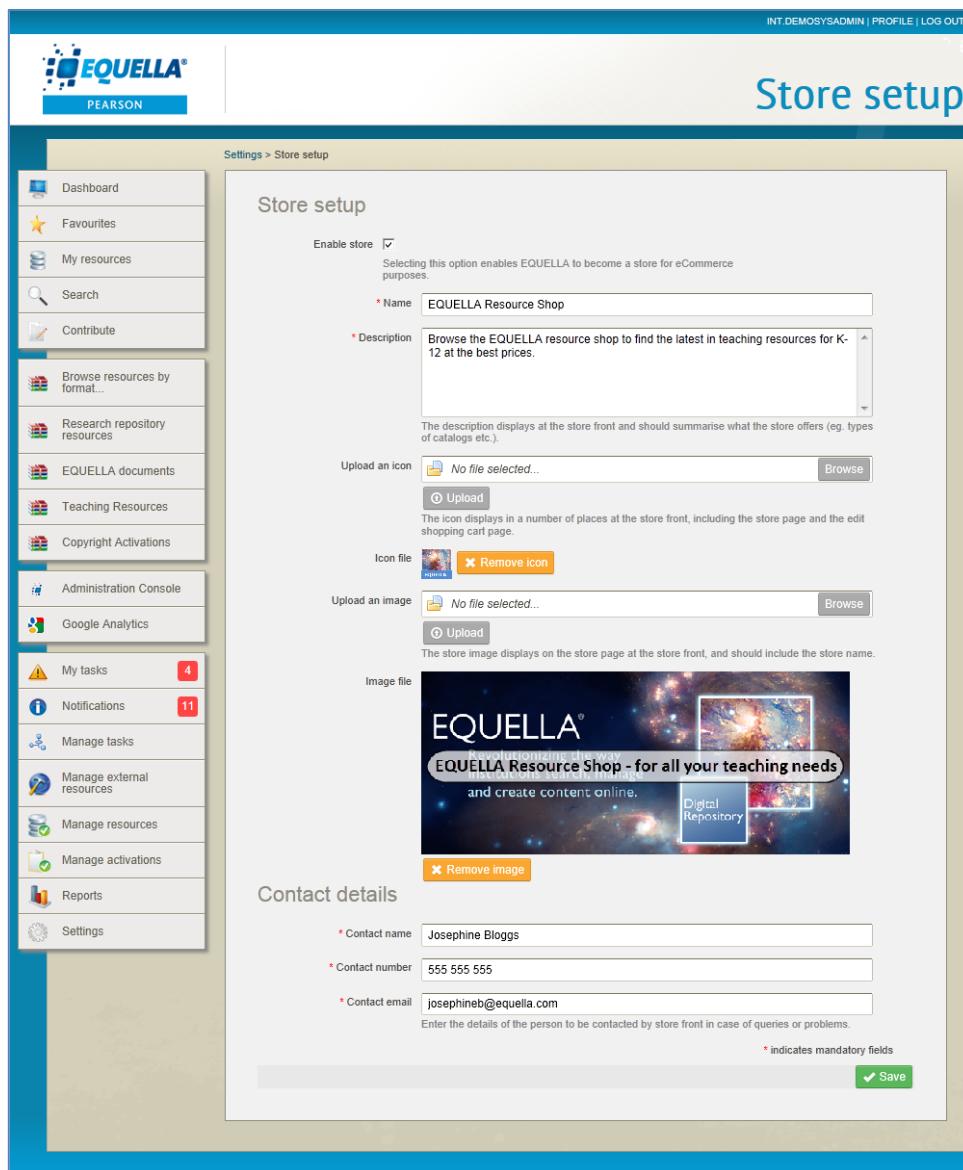
## To enable Store functionality and configure settings

1. Go to **Settings, Store setup**. The **Store setup** page displays. An example is shown in Figure 1.



**Figure 2 Store setup page**

2. Select **Enable store**. Additional Store setup options display on the page. An example is shown in Figure 3.



**Figure 3 Enabled Store front page**

3. Enter the following:

- **Name** – enter a store name. Note that the name displays on a number of store front pages during the viewing and purchasing of catalogue resources.
- **Description** – enter a description for the store. The text entered in this field should describe the catalogues and resources available in the store (for example, *Hundreds of resources for all levels, K-12, TAFE and University, across all subjects*) as it displays under the store's image on the Stores page at the Store front.
- **Upload an icon** – upload an icon which displays next to the store name at the store front. Size requirement is 32px W x 32px H.

*NOTE: If a customised icon is not supplied, a vanilla default image is used.*

- **Upload an image** – upload an image which displays on the Stores page at the store front. The Stores page displays a list of available stores where the user clicks on the store they wish to browse, so the image doubles as a marketing tool. It should include

the store name, graphics and any other text required. The size requirement is 445px W x 190px H.

*NOTE: If a customised image is not supplied, a vanilla default image is used.*

- **Contact name, Contact number and Contact email** – enter the contact details for the delegated store contact. This information is displayed at the store front, so store front administrators with queries or problems can call or email the store contact.

4. Click .

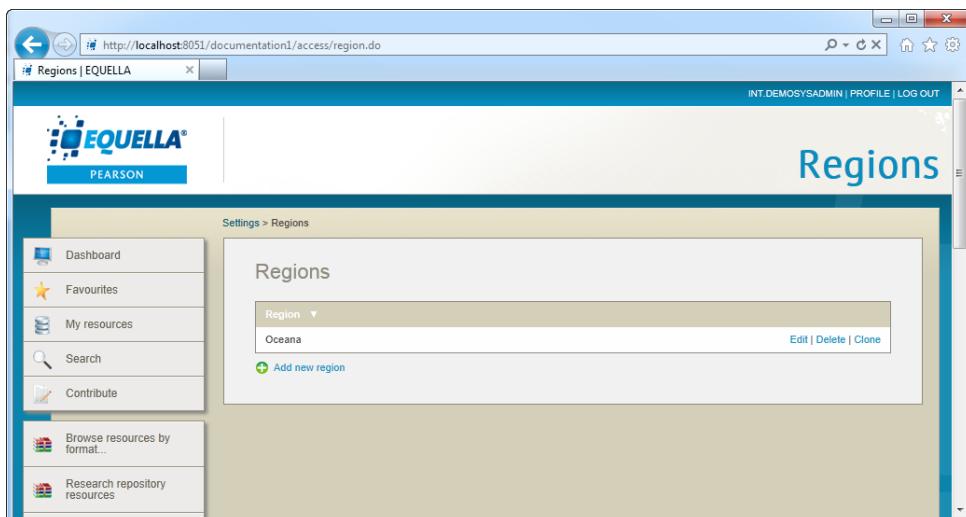
## Regions

Regions can be configured and used to restrict access to catalogues. When creating a region, countries can be handpicked or predefined regions can be selected.

*NOTE: The Region configuration ACLS are CREATE\_REGION, DELETE\_REGION and EDIT\_REGION.*

### To add a region

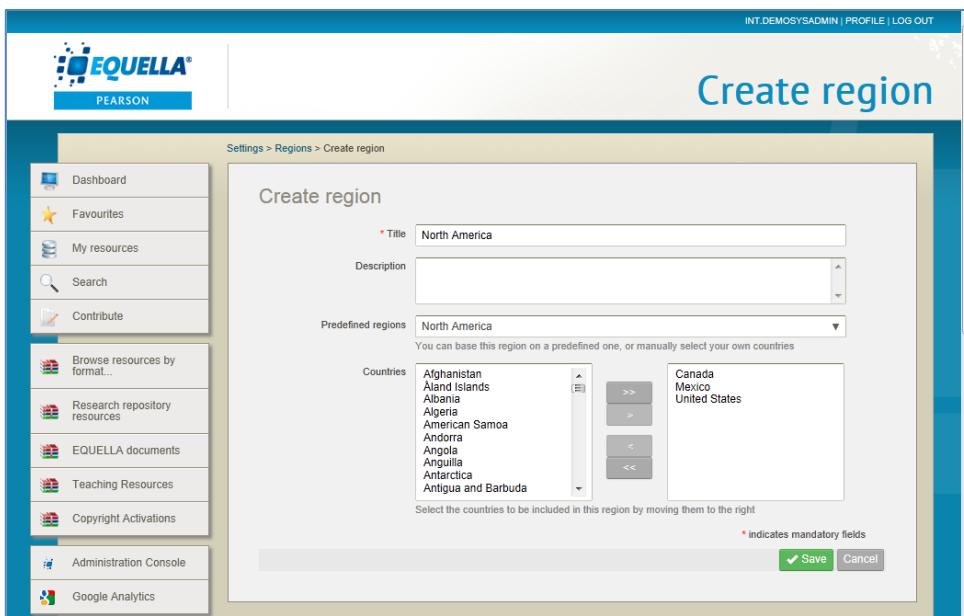
1. Go to **Settings, Regions**. The **Regions** page displays with any existing regions listed. An example is shown in Figure 4.



The screenshot shows a web browser window for the EQUILLA platform. The URL is http://localhost:8051/documentation1/access/region.do. The title bar says 'Regions | EQUILLA'. The main content area is titled 'Regions' and shows a table with one row. The table has columns for 'Region' and actions 'Edit | Delete | Clone'. The single row contains the value 'Oceana'. At the bottom of the table is a link 'Add new region'. On the left, there's a sidebar with links like Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format..., and Research repository resources. The top right corner shows user info: INT.DEMOSYSADMIN | PROFILE | LOG OUT.

**Figure 4 Regions page**

2. Click the **Add new region** link at the bottom of the table. The **Create region** page displays, as shown in Figure 5.



**Figure 5 Create region page**

3. Enter a **Title** (mandatory) and **Description** (optional).
4. Either:
  - **Select a predefined region** from the drop-down list if the region to be created matches one of the predefined regions, or
  - Select the countries to be included in the new region.

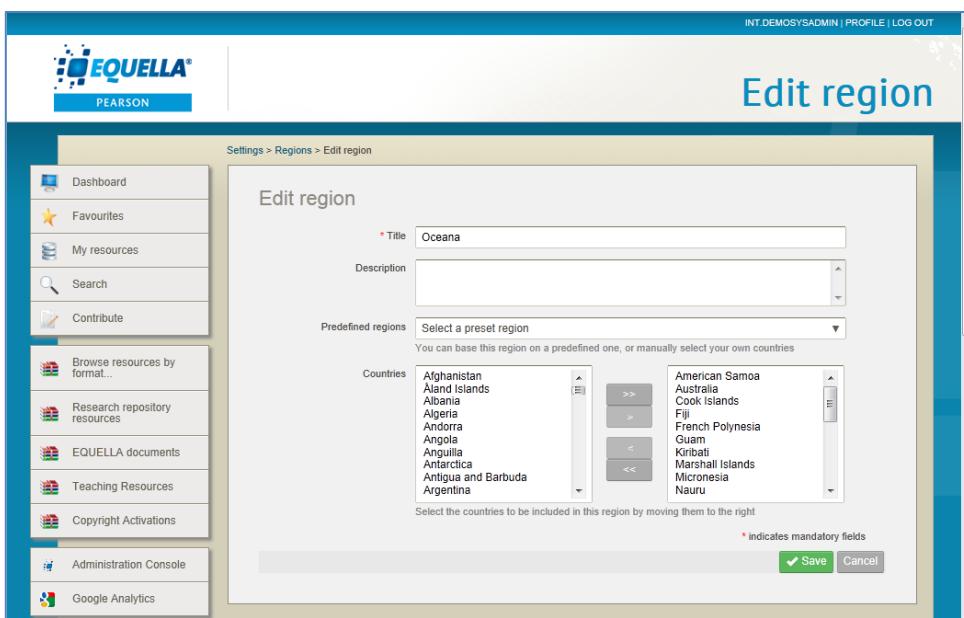
*NOTE: The predefined regions can be edited, so if the region to be created is close to matching a predefined one, select the closest match then add and remove countries as required.*

If a predefined region is selected, the region's countries are listed in the right hand panel. Use the following buttons to create or edit the region:

- Click **>** to add selected countries from the **Countries** list (hold down **CTRL** to select multiple countries) to the right hand panel.
  - Click **>>** to add all countries in the **Countries** list to the right hand panel.
  - Click **<** to remove selected countries from the right hand panel.
  - Click **<<** to remove all countries from the right hand panel.
5. Click **✓ Save**. The region is now listed on the **Regions** page.

## To edit a region

1. Go to **Settings, Regions**. The **Regions** page displays with existing regions listed. An example is shown in Figure 4.
2. Click the **Edit** link beside the region to be edited. The Edit region page displays. An example is shown in Figure 6.



**Figure 6 Edit region page**

3. Make the required changes, then click .

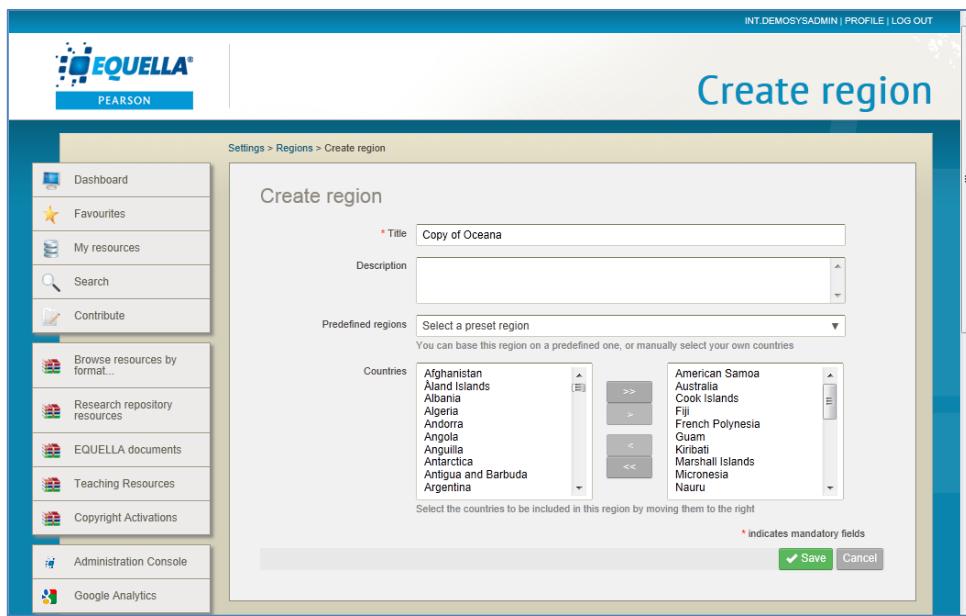
### To delete a region

1. Go to **Settings, Regions**. The **Regions** page displays with existing regions listed. An example is shown in Figure 4.
2. Click the **Delete** link beside the region to be deleted. A confirmation box displays. Click  to confirm the deletion.

*NOTE: A 'This region is in use and cannot be deleted' dialog displays if a user tries to delete a region currently in use.*

### To clone a region

1. Go to **Settings, Regions**. The **Regions** page displays with existing regions listed. An example is shown in Figure 4.
2. Click the **Clone** link beside the region to be cloned. The Create region page opens, with the country information defaulted. An example is shown in Figure 7.



**Figure 7 Create region page after Clone option selected**

3. Change the **Title** and country information as required.
4. Click **✓ Save**. The new region is now listed on the **Regions** page.

## Catalogues

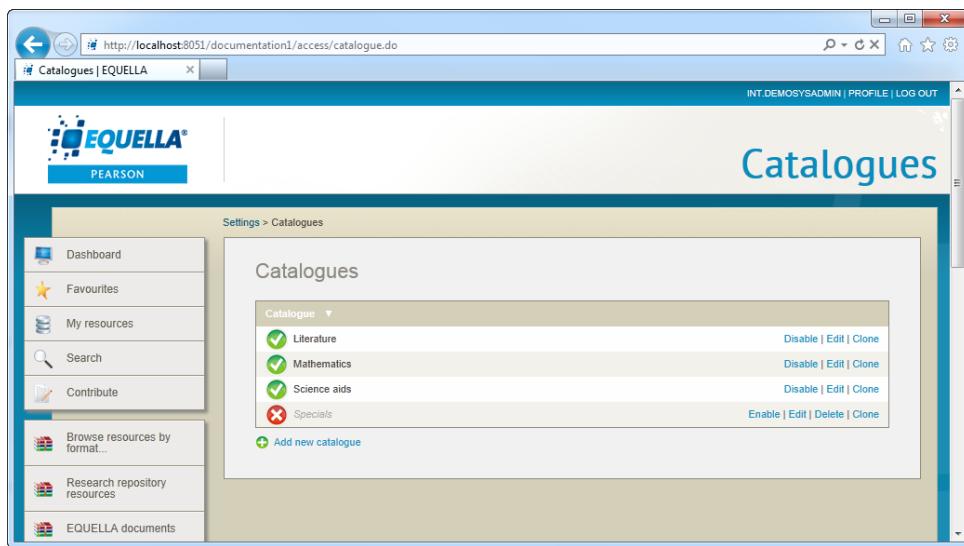
Catalogues enable resources to be grouped and priced, then made available to store front users for purchasing. Catalogues can be restricted to specific regions. Resources can be automatically added to a catalogue via an associated dynamic collection, or added manually. See [Catalogues](#) on page 33 for further information.

*NOTE: The dynamic collection must exist prior to creating the catalogue. See the EQUELLA 6.0 Dynamic Collection Configuration Guide for further information.*

*NOTE: The Catalogue configuration ACLs are CREATE\_CATALOGUE, DELETE\_CATALOGUE and EDIT\_CATALOGUE.*

### To add a catalogue

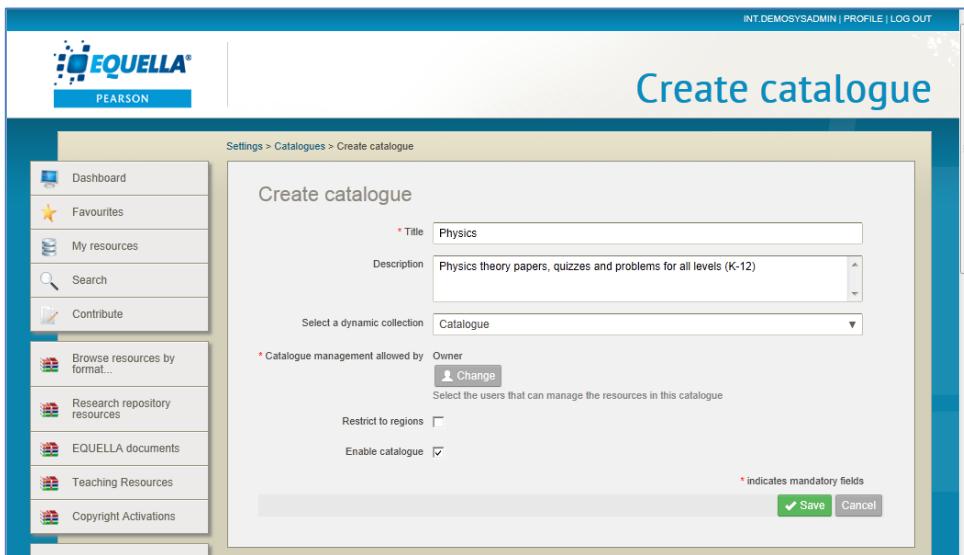
1. Go to **Settings, Catalogues**. The **Catalogues** page displays with any existing catalogues listed. An example is shown in Figure 8.



**Figure 8 Catalogues page**

*NOTE: Enabled catalogues display with the ✓ icon, and disabled with the ✗ icon.*

2. Click the **Add new catalogue** link at the bottom of the table. The **Create catalogue** page displays, as shown in Figure 9.



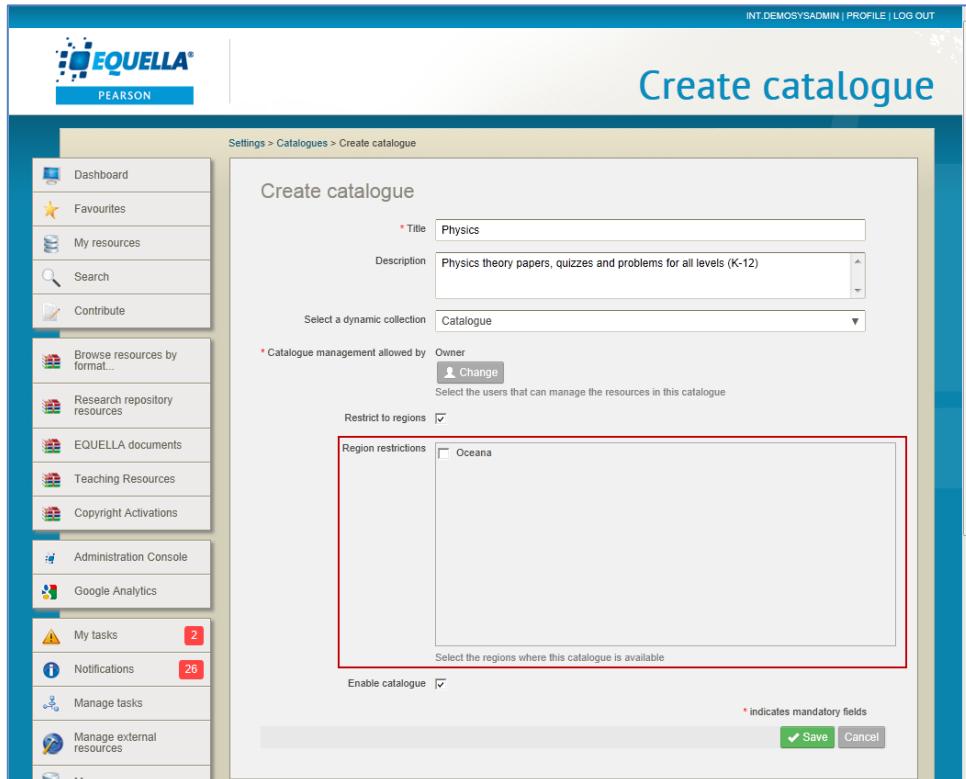
**Figure 9 Create catalogue page**

3. Enter the **Title** and **Description**, which display at the store front. The text entered in the description field should clearly summarise what is contained in the catalogue, so purchasers can select the catalogues most relevant for their purpose.
4. **Select a dynamic collection** to automatically add resources matching the dynamic collection's criteria to the catalogue. If a dynamic collection is not selected, resources can be handpicked and added manually. (See [Catalogues](#) on page 28 for further information.)
5. The **Catalogue management allowed by** field defaults to **Owner**. This is associated with the MANAGE\_CATALOGUE privilege, which, when granted to a user at a catalogue level, allows them to add resources to and exclude resources from that

catalogue, as well as search and filter that catalogue's resources. (See [Store privileges](#) on page 5 for further information.)

Click **Change** to open the **Select recipients** dialog, select the required users, groups or roles, then click **✓ OK**.

- If the catalogue is only available to specific regions, select the **Restrict to regions** checkbox to display available regions. An example is shown in Figure 10.



**Figure 10 Create catalogue page with regions restrictions enabled**

- Select the regions that are able to access the catalogue, if relevant.
- Select the **Enable catalogue** checkbox to make the catalogue available for use.

*NOTE: A disabled catalogue does not display at a store front. Enabling a catalogue makes it store front-ready.*

- Click **✓ Save**. The new catalogue is now listed on the **Catalogues** page.

## To enable a catalogue

- Go to **Settings, Catalogues**. The **Catalogues** page displays with existing catalogues listed. An example is shown in Figure 8.
- Click the **Enable** link beside the catalogue to be enabled. The link changes to **Disable** and the **✓** icon displays.

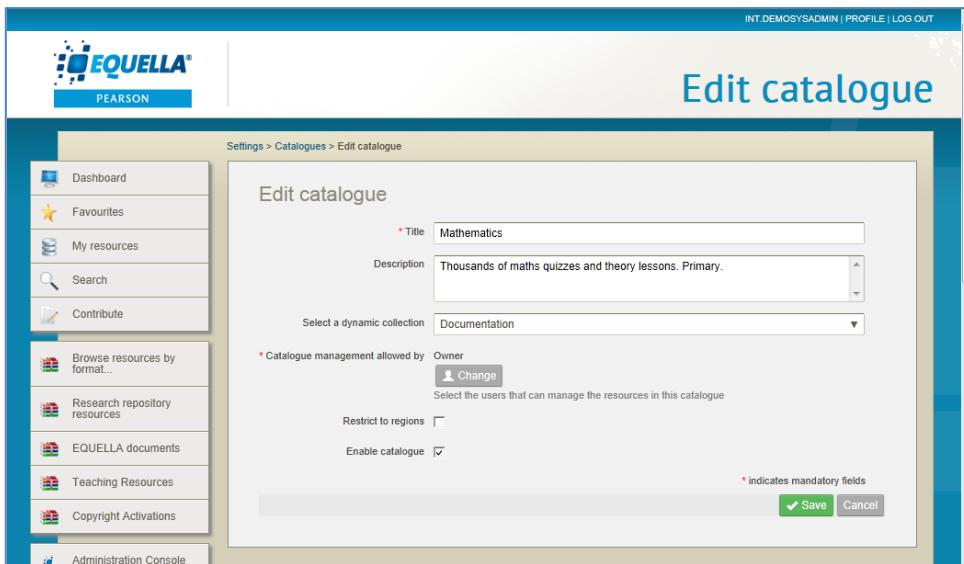
## To disable a catalogue

- Go to **Settings, Catalogues**. The **Catalogues** page displays with any existing catalogues listed. An example is shown in Figure 8.

2. Click the **Disable** link beside the catalogue to be disabled. The link changes to **Enable** and the  icon displays.

### To edit a catalogue

1. Go to **Settings, Catalogues**. The **Catalogues** page displays with any existing catalogues listed. An example is shown in Figure 8.
2. Click the **Edit** link beside the catalogue to be edited. The **Edit catalogue** page displays. An example is shown in Figure 11.



**Figure 11 Edit catalogue page**

3. Make the required changes then click .

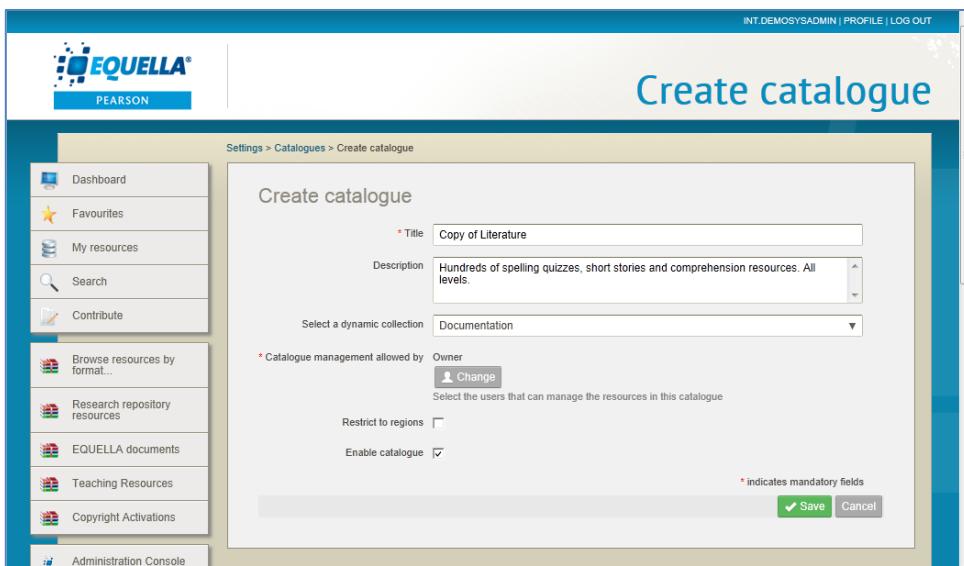
### To delete a catalogue

*NOTE: A catalogue must be **Disabled** to be deleted. The delete link doesn't appear for enabled catalogues.*

1. Go to **Settings, Catalogues**. The **Catalogues** page displays with existing catalogues listed. An example is shown in Figure 8.
2. Click the **Delete** link beside the catalogue to be deleted. A confirmation dialog displays. Click  to confirm the deletion.

### To clone a catalogue

1. Go to **Settings, Catalogues**. The **Catalogues** page displays with any existing catalogues listed. An example is shown in Figure 8.
2. Click the **Clone** link beside the catalogue to be cloned. The **Create catalogue** page displays. An example is shown in Figure 12.



**Figure 12 Create catalogue page after Clone option selected**

3. Change the **Title** and other information as required.
4. Click **✓ Save**. The new catalogue is now listed on the **Catalogues** page.

## Pricing tiers

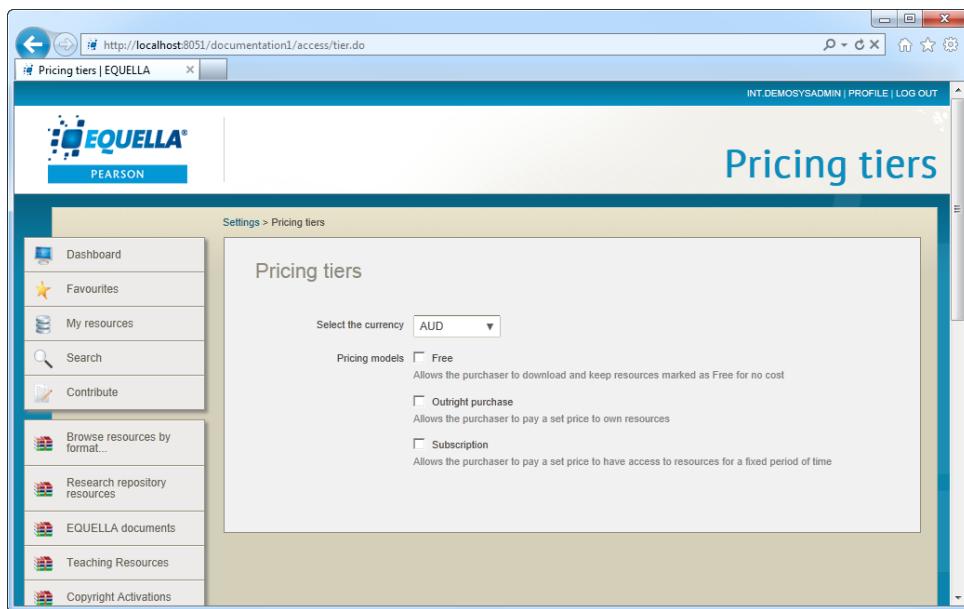
Pricing tiers allow resources to be priced for purchasing, and are set at a global level, along with the store currency. Three pricing models are available to be used at the store, and are outlined below:

- **Free** – Selecting this option allows the store to offer resources to the store front free of charge. The purchaser can download and keep resources marked as Free for no cost.
- **Outright purchase** – Selecting this option allows the store to offer resources that can be purchased outright. The purchaser pays a set price to own the resource.
- **Subscription** – Selecting this option allows the store to offer resources that can be purchased for a fixed duration, after which the resource is no longer available to the purchaser.

*NOTE: The pricing tier configuration ACLS are CREATE\_TIER, EDIT\_TIER and DELETE\_TIER.*

### To configure pricing tiers

1. Go to **Settings, Pricing tiers**. The Pricing tiers page displays. An example is shown in Figure 13.



**Figure 13 Pricing tiers page**

2. **Select the currency** to be used for the store from the drop-down list. The currency initially defaults to that of the country set in the system regional settings.
3. Select the **Pricing models** to be available when pricing resources for the store.
  - If **Outright purchase** is selected, the **Purchase pricing tiers** section displays. See [Purchase pricing tiers](#) on page 19.
  - If **Subscription** is selected, the **Subscription pricing tiers** section displays. See [Subscription pricing tiers](#) on page 21.

*NOTE: Prices entered in the pricing tiers function are sales tax exclusive.*

An example of the Pricing tier page with configured pricing tiers is shown in Figure 14.

The screenshot shows the 'Pricing tiers' page in the EQUELLA administration console. The left sidebar includes links for Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format..., Research repository resources, EQUELLA documents, Teaching Resources, Copyright Activations, Administration Console, Google Analytics, My tasks (2), Notifications (26), Manage tasks, Manage external resources, Manage resources, Manage activations, and Reports.

The main content area is titled 'Pricing tiers'. It shows 'Purchase pricing tiers' and 'Subscription pricing tiers' sections.

**Purchase pricing tiers:**

- Prices based on: Flat rate

Pricing tier	Price	Action
OP Tier 1	\$25.00 AUD	Disable   Edit   Clone
OP Tier 2	\$30.00 AUD	Disable   Edit   Clone
OP Tier 3	\$35.00 AUD	Disable   Edit   Clone

[Add new purchase pricing tier](#)

**Subscription pricing tiers:**

  - Prices based on: Per user

Pricing tier	Week	Month	3 Months	6 Months	Year	Action
S Tier 1	\$0.99 AUD	\$2.99 AUD	\$4.99 AUD	\$6.99 AUD	\$10.99 AUD	Disable   Edit   Clone
S Tier 2	\$1.99 AUD	\$3.99 AUD	\$5.99 AUD	\$7.99 AUD	\$12.99 AUD	Disable   Edit   Clone
S Tier 3	\$3.99 AUD	\$5.99 AUD	\$7.99 AUD	\$9.99 AUD	\$15.99 AUD	Disable   Edit   Clone

[Add new subscription pricing tier](#)

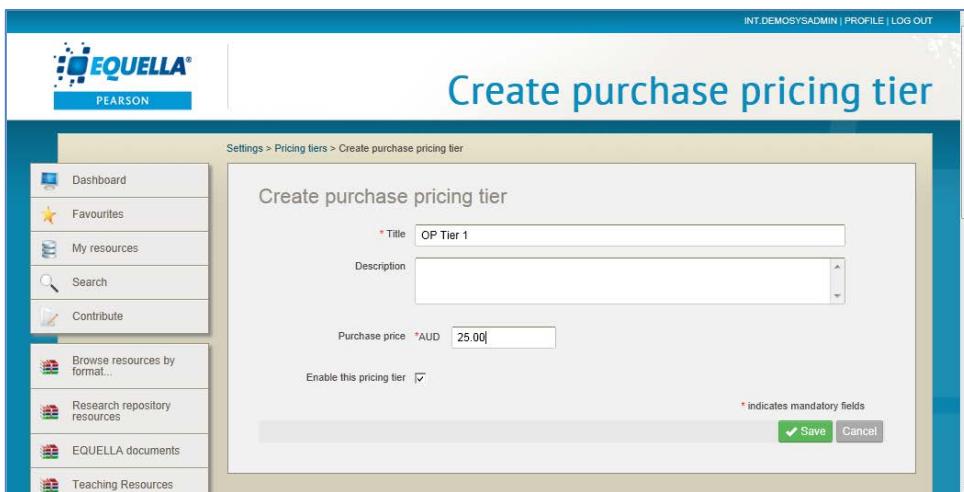
Figure 14 Pricing tiers page with configured tiers

## Purchase pricing tiers

When this pricing model is enabled, resources to be made available for purchase have a set price. The purchaser pays the price to own the resource. The pricing can be based on a **Flat rate** or a **Per user** price. If **Per user** is selected, when a purchaser selects the resource, they also select the number of users. All tiers use the selected pricing base.

### To add a Purchase pricing tier

1. Select **Flat rate** or **Per user** from the **Prices based on** drop-down. *NOTE: This option is selected the first time a Purchase pricing tier is set up. It applies to all the purchase pricing tiers.*
2. Click the **Add new purchase pricing tier** link. The **Create pricing tier** page displays, as shown in Figure 15.



**Figure 15 Create purchase pricing tier**

3. Enter a tier **Title** (mandatory), (e.g. *OP Tier*) and description (optional). Note that the pricing tier title (without costs) displays on results pages for catalogue resources, so try to make it brief but meaningful.
4. Enter the **Purchase price** (e.g. 25.00).

*NOTE: Prices entered in the pricing tiers function are sales tax exclusive.*

5. Click **✓ Save**. The new pricing tier is now listed in the Purchase pricing tiers section. An example is shown in Figure 16.

Purchase pricing tiers		
Prices based on <b>Flat rate</b>		
Pricing tier	Price	
OP Tier 1	\$25.00 AUD	<a href="#">Edit   Delete   Clone</a>
<a href="#">+ Add new purchase pricing tier</a>		

**Figure 16 Purchase pricing tiers section**

### To edit a purchase pricing tier

1. Go to **Settings, Pricing tiers**. The Pricing tiers page displays with existing pricing tiers listed.
2. Click the **Edit** link beside the purchase pricing tier to be edited. The **Edit purchase pricing tier** page displays.
3. Make the required changes, then click **✓ Save**.

### To delete a purchase pricing tier

1. Go to **Settings, Pricing tiers**. The **Pricing tiers** page displays with existing pricing tiers listed.
2. Click the **Delete** link beside the purchase pricing tier to be deleted. A confirmation box displays. Click **OK** to confirm the deletion.

*NOTE: A 'This pricing tier is in use and cannot be deleted' dialog displays if a user tries to delete a pricing tier currently in use.*

### To clone a purchase pricing tier

1. Go to **Settings, Pricing tiers**. The **Pricing tiers** page displays with existing purchase pricing tiers listed. An example is shown in Figure 16.
2. Click the **Clone** link beside the purchase pricing tier to be cloned. The **Create purchase pricing tier** page opens, with the pricing tier information defaulted. An example is shown in Figure 17.

The screenshot shows the 'Create purchase pricing tier' dialog box. The title bar reads 'Create purchase pricing tier'. The main form contains the following fields:

- Title: Copy of OP Tier 1
- Description: (empty)
- Purchase price: \*AUD 25.00
- Enable this pricing tier:

At the bottom right of the dialog are 'Save' and 'Cancel' buttons. A note at the bottom right indicates that asterisks (\*) denote mandatory fields.

**Figure 17 Create purchase pricing tier after Clone option is selected**

3. Change the **Title**, **Description** and **Purchase price** as required.
4. Click **✓ Save**. The new purchase pricing tier is now listed in the **Purchase pricing tiers** section on the **Pricing tiers** page.

## Subscription pricing tiers

When this pricing model is enabled, resources to be made available for subscription have set durations with associated pricing. The purchaser selects the required duration and pays the associated price to have access to the resource for that duration.

Durations that can be set are:

- **Week**
- **Month**
- **3 Months**
- **6 Months**
- **Year**

It is not mandatory to set a price for every duration, although at least one must be configured. A duration may have a zero price set (e.g. 0.00) to allow for a free subscription period before the subscription requires purchasing. The purchaser can select the subscription start date.

The pricing can be based on a **Flat rate** or a **Per user** price. If **Per user** is selected, when a purchaser selects the resource, they also select the number of users. Each tier added uses the selected pricing base.

## To add a Subscription pricing tier

1. Select **Flat rate** or **Per user** from the **Prices based on** drop-down. *NOTE: This option is selected the first time a Subscription pricing tier is set up. It applies to all the subscription pricing tiers.*
2. Click the **Add new subscription pricing tier** link. The **Create subscription pricing tier** page displays, as shown in Figure 18.

**Create subscription pricing tier**

\* Title: S Tier 1

Description:

Week  \*AUD 99

Month  \*AUD 2.99

3 Months  \*AUD 4.99

6 Months  \*AUD 6.99

Year  \*AUD 10.99

Enable this pricing tier

\* indicates mandatory fields

**Save** **Cancel**

**Figure 18 Create subscription pricing tier**

3. Enter a tier **Title** (mandatory), (e.g. *S Tier 1*) and **Description** (optional).
4. Select the required durations, and enter the associated **Subscription price** (e.g. *Week* and *.99*, *Month* and *2.99*, *3 Months* and *4.99*, *6 Months* and *6.99*, *Year* and *10.99*).

*NOTE: Prices entered in the pricing tiers function are sales tax exclusive.*

5. Click **Save**. The new pricing tier is now listed in the Subscription pricing tiers section. An example is shown in Figure 19.

**Subscription pricing tiers**

Pricing tier	Week	Month	3 Months	6 Months	Year
S Tier 1	\$0.99 AUD	\$2.99 AUD	\$4.99 AUD	\$6.99 AUD	\$10.99 AUD

**Add new subscription pricing tier**

**Figure 19 Subscription pricing tiers section**

## To edit a subscription pricing tier

1. Go to **Settings, Pricing tiers**. The Pricing tiers page displays with existing pricing tiers listed. An example is shown in Figure 19.
2. Click the **Edit** link beside the subscription pricing tier to be edited. The **Edit subscription pricing tier** page displays.
3. Make the required changes, then click **✓ Save**.

## To delete a purchase pricing tier

1. Go to **Settings, Pricing tiers**. The **Pricing tiers** page displays with existing pricing tiers listed. An example is shown in Figure 19.
2. Click the **Delete** link beside the subscription pricing tier to be deleted. A confirmation box displays. Click **OK** to confirm the deletion.

*NOTE: A 'This pricing tier is in use and cannot be deleted' dialog displays if a user tries to delete a pricing tier currently in use.*

## To clone a purchase pricing tier

1. Go to **Settings, Pricing tiers**. The **Pricing tiers** page displays with existing subscription pricing tiers listed. An example is shown in Figure 19.
2. Click the **Clone** link beside the subscription pricing tier to be cloned. The **Create subscription pricing tier** page opens, with the pricing tier information defaulted. An example is shown in Figure 20.

The screenshot shows the 'Create subscription pricing tier' page. The title bar says 'Create subscription pricing tier'. The main area has a form with the following fields:

- Title:** Copy of S Tier 1
- Description:** (empty)
- Week:** checked, \*AUD 0.99
- Month:** checked, \*AUD 2.99
- 3 Months:** checked, \*AUD 4.99
- 6 Months:** checked, \*AUD 6.99
- Year:** checked, \*AUD 10.99

At the bottom, there's a checkbox for 'Enable this pricing tier' and a note: '\* indicates mandatory fields'. There are 'Save' and 'Cancel' buttons at the bottom right.

**Figure 20 Create subscription pricing tier page after Clone option has been selected**

3. Change the **Title**, **Description** and duration information as required.
4. Click **✓ Save**. The new subscription pricing tier is now listed in the **Subscription pricing tiers** section on the **Pricing tiers** page.

## Payment gateways

Payment gateways are the third party payment applications that can be accessed from an order page on the store front. The payer selects the relevant payment gateway icon to open the gateway and complete the transaction. The payment gateways supported in EQUELLA 6.0 are:

- **Google Checkout** (available for the U.K. and U.S.A. only).
- **PayPal**

*NOTE: The payment gateway configuration ACLs are CREATE\_PAYMENT\_GATEWAY, EDIT\_PAYMENT\_GATEWAY and DELETE\_PAYMENT\_GATEWAY.*

### Google Checkout

*NOTE: Google Checkout is only available to merchants in the USA or UK.*

A merchant Google Checkout account will need to exist for the store institution to use this function. Go to

<https://accounts.google.com/ServiceLogin?service=sierra&ltmpl=selleruk&continue=https://checkout.google.com/merchantSignInRedirect> and follow the directions to set up a merchant account.

Google Checkout also allows a Sandbox environment to be created. Sandbox accounts can be created and used for testing purposes.

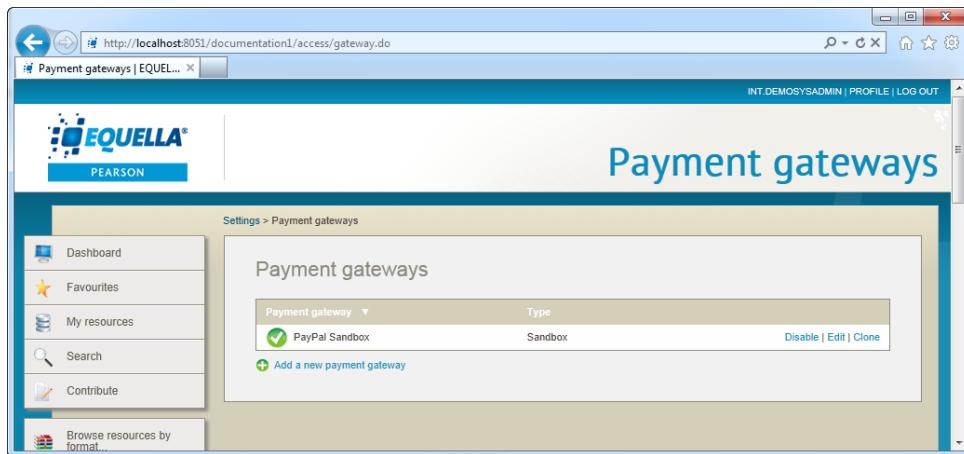
*NOTE: Sandbox environments should only be used for testing purposes in-house prior to the Store going live with registered Store fronts. If registered Store fronts access the Sandbox payment gateway, valid transactions can occur which result in resources being harvested from the Store at no cost.*

Go to <http://support.google.com/checkout/sell/bin/answer.py?hl=en&answer=134469> to create Sandbox accounts.

*NOTE: To access the Google Checkout account information required to set up the Payment gateways in EQUELLA, once the account is created, go to **Settings**, **Integrations** page on the Google Checkout site. The Google Checkout Integrations page displays the **Merchant ID** and **Merchant Key**. Additionally, the Store URL needs to be entered into the **API Callback URL** field on that page, in the form http://myinstitution.com/institution/google-notification/.*

### To set up a Google Checkout

1. Go to **Settings**, **Payment gateways**. The **Payment gateways** page displays with existing payment gateways listed. An example is shown in Figure 21.

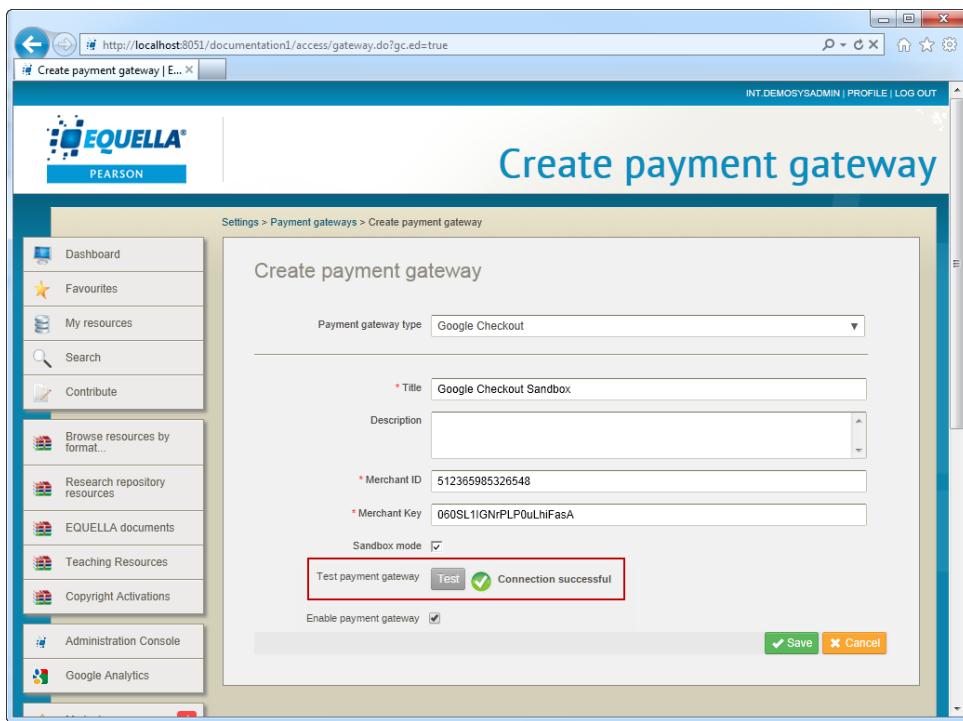


**Figure 21 Payment gateways page**

2. Click the **Add a new payment gateway** link. The **Create payment gateway** page displays, with a **Payment gateway type** drop-down.
3. Select **Google Checkout** from the list. The **Google Checkout** fields display. An example is shown in Figure 22.

**Figure 22 Create payment gateway - Google Checkout**

4. Enter a **Title** (mandatory) (e.g. *PayPal*) and **Description** (optional).
5. Enter the **Merchant ID** supplied by Google Checkout.
6. Enter the **Merchant Key** supplied by Google Checkout.
7. Select **Sandbox** mode if it is a sandbox account.
8. Click **Test** to test the connection. A **Connection successful** message displays. An example is shown in Figure 23.



**Figure 23 Google Checkout - successful connection**

9. Click the **Enable payment gateway** to start using the account immediately.
10. Click **✓ Save**. The Payment gateway is now listed on the **Payment gateways** page.  
*NOTE: Multiple payment gateways can be set up for Google Checkout, but only one can be enabled at a time. For example, a Sandbox and Live version could be configured, but not enabled simultaneously.*

## PayPal

A business PayPal account will need to exist for the store institution to use this function. Go to [www.paypal.com](http://www.paypal.com) and click on the **Business** tab to create the required account.

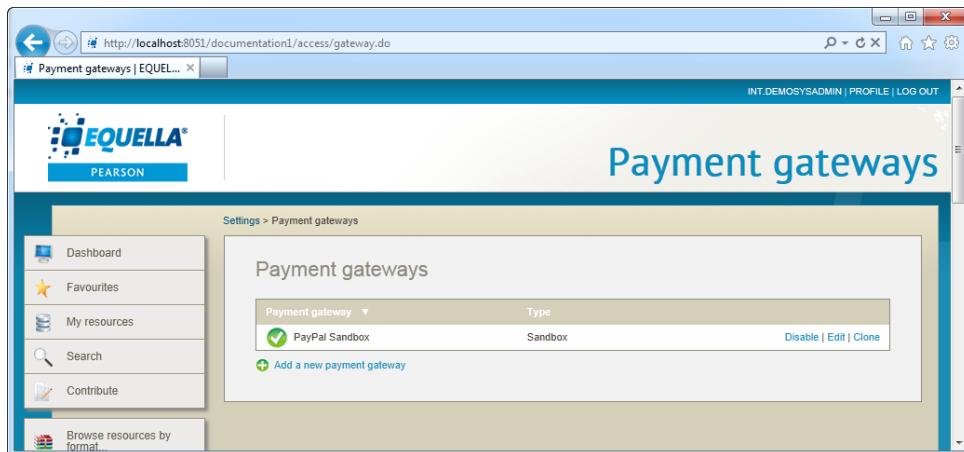
PayPal also allows a Sandbox environment to be created. Sandbox accounts can be created and used for testing purposes.

*NOTE: Sandbox environments should only be used for testing purposes in-house prior to the Store going live with registered Store fronts. If registered Store fronts access the Sandbox payment gateway, valid transactions can occur which result in resources being harvested from the Store at no cost.*

Go to <http://developer.paypal.com> to create Sandbox accounts.

## To set up a PayPal payment gateway in EQUILLA

1. Go to **Settings, Payment gateways**. The **Payment gateways** page displays with existing payment gateways listed. An example is shown in Figure 24.



**Figure 24 Payment gateways page**

2. Click the **Add a new payment gateway** link. The **Create payment gateway** page displays, with a **Payment gateway type** drop-down.
3. Select **PayPal** from the list. The **PayPal** fields display. An example is shown in Figure 25.

The screenshot shows the 'Create payment gateway' page for PayPal. The left sidebar is identical to Figure 24. The main form has a title 'Create payment gateway'. It includes a 'Payment gateway type' dropdown set to 'PayPal', a 'Title' field containing 'PayPal', a 'Description' text area, a 'PayPal Username' field with the value 'myinstitution@myinstitution.com', and a 'Sandbox mode' checkbox. At the bottom are 'Save' and 'Cancel' buttons.

**Figure 25 Create payment gateway – PayPal**

4. Enter a **Title** (mandatory) (e.g. *PayPal*) and **Description** (optional).
5. Enter the institution's **PayPal Username** (which is an email address) for live versions, or the Sandbox email address supplied by PayPal for sandbox versions.
6. Select **Sandbox mode** if the Sandbox account has been used.
7. Click the **Enable payment gateway** to start using the account immediately.
8. Click **Save**. The Payment gateway is now listed on the **Payment gateways** page.

*NOTE: Multiple payment gateways can be set up for PayPal, but only one can be enabled at a time. For example, a Sandbox and Live version could be configured, but not enabled simultaneously.*

## Store taxes

The **Store taxes** setting allows sales taxes to be configured. These taxes can be applied to individual store fronts registering to purchase content from the store. See [Store front registrations](#) on page 29 for further information.

### To add a store tax

1. Go to **Settings, Store taxes**. The **Store taxes** page displays, with existing taxes listed. An example is shown in Figure 26

Title	Tax code	Rate (%)
Australian GST	GST	10.00

[Edit | Delete | Clone](#)

[Add new tax](#)

Figure 26 Store taxes page

2. Click the **Add new tax** link to display the **Create tax** page. An example is shown in Figure 27.

**Create tax**

\* Title: Colorado Sales Tax

Description:

\* Tax code: STAX  
E.g. VAT, GST

\* Rate (%): 8

\* indicates mandatory fields

Save    Cancel

Figure 27 Create tax page

3. Enter a tax **Title** (mandatory) and **Description** (optional).
4. Enter a **Tax Code** (e.g. **STAX**). This code displays on the Shopping cart page at the Shop front, so should be limited to 6 or less characters.
5. Enter the tax **Rate (%)** (e.g. **8**)
6. Click  **Save**. The Store tax is now listed on the **Store taxes** page.

## To edit a store tax

1. Go to **Settings, Store taxes**. The **Store taxes** page displays with any existing taxes listed. An example is shown in Figure 26.
2. Click the **Edit** link beside the store tax to be edited. The **Edit tax** page displays.
3. Make the required changes then click **✓ Save**.

## To delete a store tax

1. Go to **Settings, Store taxes**. The **Store taxes** page displays with existing taxes listed. An example is shown in Figure 26Figure 28.
2. Click the **Delete** link beside the store tax to be deleted. A confirmation dialog displays. Click **OK** to confirm the deletion.

## To clone a store tax

3. Go to **Settings, Store taxes**. The **Store taxes** page displays with existing taxes listed. An example is shown in Figure 26Figure 28.
4. Click the **Clone** link beside the store tax to be cloned. The **Create tax** page displays with the tax information defaulted. An example is shown in

The screenshot shows the 'Create tax' form within the EQUELLA interface. The left sidebar contains links like Dashboard, Favourites, My resources, Search, Contribute, and several EQUELLA-specific sections. The main form has fields for Title (set to 'Copy of Australian GST'), Description, Tax code (set to 'GST'), and Rate (%). A note at the bottom right says 'indicates mandatory fields'. At the bottom are '✓ Save' and 'Cancel' buttons.

5. Change the **Title**, **Description** and other information as required.
6. Click **✓ Save**. The new store tax is now listed in the **Store taxes** page.

## Store front registrations

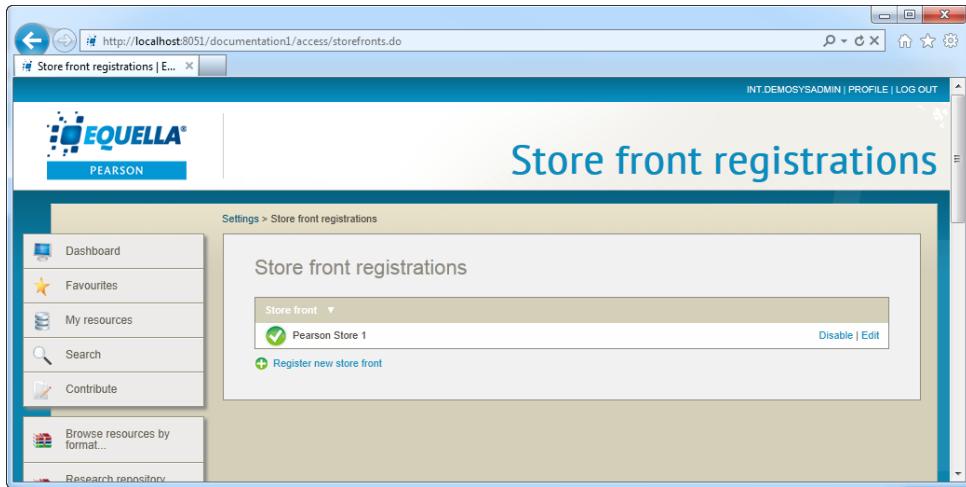
The **Store front registrations** setting enables the store to register store fronts.

A unique Store front user is created for each store (with no permissions), and general store front information is entered. To complete the registration process, registration information is then provided to the store front, which, once entered at the store front, allows that store front access to the store and its catalogues.

*NOTE: The Store front registrations configuration ACLs are CREATE\_STOREFRONT, EDIT\_STOREFRONT and DELETE\_STOREFRONT.*

## To add a store front registration

1. Go to **Settings, Store front registrations**. The **Store front registrations** page displays, with existing registrations listed. An example is shown in Figure 28.



**Figure 28 Store front registrations page**

*NOTE: Enabled Store front registrations display with the icon, and disabled with the .*

2. Click the **Register new store front** link. The **Create store front registration** page displays. An example is shown in Figure 29.

The screenshot shows the 'Edit store front registration' page in the EQUELLA interface. The left sidebar contains various navigation links such as Dashboard, Favourites, My resources, Search, Contribute, and several document-related options like Browse resources by format, Research repository resources, EQUELLA documents, Teaching Resources, and Copyright Activations. The main form is titled 'Edit store front registration' and includes the following fields:

- Registration name:** Pearson University
- Notes:** (empty text area)
- Transactions allowed:**
  - Free
  - Outright purchase
  - Subscription
- Tax:** Australian GST
- Registration details:**
  - Application:** EQUELLA
  - Version:** 6.0 GA
  - Country:** Australia
  - Contact no.:** 555 555 555
- OAuth:**
  - Client ID:** 000001
  - Redirect URL:** http://localhost:8060/shopfront/access/registerstore.do
  - Store front user:** Internal EQUELLA Demonstration System Administrator (with a 'Change user' button)
- Enabled:**

A note at the bottom right indicates that the asterisk (\*) denotes mandatory fields. At the bottom right of the form are 'Save' and 'Cancel' buttons.

**Figure 29 Create store front registration page**

3. Enter the **Registration name** (e.g. *Pearson University*), and any relevant **Notes**.
4. Select the **Transactions allowed** for the registration. Depending on the pricing models configured for the store, some transaction types may be irrelevant. The transaction types are:
  - **Free**
  - **Outright purchase**
  - **Subscription**

This setting can be used to restrict store fronts from accessing a particular transaction type (based on pricing models). Additionally, when registering with a store, a store front may request only particular transaction types for their users (for example, *Free* and *Subscription*), which would prevent their users from seeing the *Purchase Outright* options.

5. Select a relevant **Tax** from the drop-down list, if applicable (e.g. *Australian GST*). The default is *No tax*.
6. Enter the **Application** (mandatory) that the shop front is using (e.g. *EQUELLA*) and the application **Version** (e.g. *6.0*).
7. Select the store front's **Country** from the drop-down list. This is used for regions restrictions, if applicable.
8. Enter the **Contact no.** provided by the shop front.

9. Enter the **Client ID** for the shop front. This is a unique, user-defined ID which can be made up of numbers, letters and/or symbols and is case sensitive. The Client ID is provided to the store front to enable a successful connection with the store.

10. Enter the **Redirect URL** for the store front. This is in the format:

*http://storefrontinstitution/institution/access/registerstore.do*

11. Click **Change user** to open the **Select user(s)** dialog, search for the previously created store front user, then click **✓ Select this user**.

*NOTE: This user should have no permissions granted, as it is possible to log into the EQUELLA Store using this logon.*

12. Select the **Enabled** checkbox to enable the store front registration.

*NOTE: If a Store front is disabled, it won't be able to access the store and its catalogues.*

13. Click **✓ Save**. The Store front registration is now listed on the **Store front registrations** page.

### To enable a store front registration

1. Go to **Settings, Store front registrations**. The **Store front registrations** page displays with existing registrations listed. An example is shown in Figure 28.
2. Click the **Enable** link beside the store front registration to be enabled. The link changes to **Disable** and the  icon displays.

### To disable a store front registration

1. Go to **Settings, Store front registrations**. The **Store front registrations** page displays with existing registrations listed. An example is shown in Figure 28.
2. Click the **Disable** link beside the store front registration to be disabled. The link changes to **Enable** and the  icon displays.

### To edit a store front registration

3. Go to **Settings, Store front registrations**. The **Store front registrations** page displays with any existing catalogues listed. An example is shown in Figure 28.
4. Click the **Edit** link beside the store front registration to be edited. The **Edit store front registration** page displays.

5. Make the required changes then click **✓ Save**.

### To delete a store front registration

*NOTE: A store front registration must be **Disabled** to be deleted. The delete link doesn't appear for enabled store front registrations.*

6. Go to **Settings, Store front registrations**. The **Store front registrations** page displays with existing registrations listed. An example is shown in Figure 28.
7. Click the **Delete** link beside the store front registration to be deleted. A confirmation dialog displays. Click **OK** to confirm the deletion.

# Catalogues

## Catalogue overview

A catalogue is created to group and price resources that are to be made available for purchase at a store front. It would typically group resources related in subject matter (e.g. *Physics*, *English literature* etc.), although catalogues can be created and resources selected ad-hoc.

Users can mark resource attachments as '*preview*' attachments (see [Mark preview attachments](#) on page 46 for further details). The preview attachments are able to be opened at the store front, and should provide samples or outline what content will be supplied if the resource is purchased.

Resources in catalogues can have one of the following statuses:

- **Live catalogue resource** – a *live* catalogue resource is a resource added to a catalogue automatically (via an associated dynamic collection) or manually (using the [Add to catalogues](#) function), that has a resource status of '*live*' AND a pricing tier set. These resources displays for purchase at the store front.
- **Pending catalogue resource** – a '*pending*' catalogue resource is a resource added to a catalogue automatically (via an associated dynamic collection) or manually (using the [Add to catalogues](#) function), that has a resource status other than *live*, such as *moderating*, *archived*, *suspended* etc. and/or has not yet had a pricing tier set. These resources do not display in the catalogue at the store front.

Once BOTH the resource status is '*live*' and a pricing tier is set, the resource becomes a '*live catalogue resource*' and displays for purchase at the store front.

Resources can be added to a catalogue automatically by associating a dynamic collection during the catalogue creation (see [To add a catalogue](#) on page 13 for further details). All the resources matching the dynamic collection criteria are added to the catalogue as pending catalogue resources, unless pricing tiers are set prior to the catalogue being created.

Resources can also be manually added to a catalogue, either individually or in bulk.

Resources can be excluded from catalogues. It is possible that some resources matching the dynamic collection are inappropriate for the catalogue, and these resources can be excluded from the catalogue, which prevents them from automatically being added. Resources that have been excluded from a catalogue or catalogues can be removed from the exclusion list at any time.

Pricing tiers can be set for single resources from the Resource summary page (see [To set pricing tiers for a resource](#) on page 43), or for multiple resources through the **Set pricing tiers** bulk action through Manage resources function (see [To set pricing tiers for multiple resources](#) on page 44).

## Edit catalogues function

The **Edit catalogues** function is accessed from the **Actions** menu on the **Resource summary** page, and gives a snapshot of the status of a single resource in relation to the store catalogues.

*NOTE: A user must be granted the MANAGE\_CATALOGUES ACL for at least one catalogue for this function to display.*

An example of an **Edit catalogues** page is shown in Figure 30

The screenshot shows a web browser window for the EQUELLA application. The URL is <http://localhost:8051/documentation1/items/4f77de90-cef4-4f77-a0cb-0b311sa99e3c/1/?is.summaryId=arfc>. The page title is "Resource". On the left, there's a sidebar with links like Dashboard, Favourites, My resources, Search, Contribute, and various document types. The main content area has a heading "Edit catalogues" with a red box labeled "2.". Below it is a table:

Catalogue	Status	Action
Fine Arts	Manual	<a href="#">Remove from manual additions</a>
Literature	Auto	<a href="#">Exclude from catalogue</a>
Mathematics	Excluded	<a href="#">Remove from exclusions</a>
Science aids	Manual	<a href="#">Remove from manual additions</a>
Specials	None	<a href="#">Add to catalogue</a>

Below the table are two buttons: "In this catalogue" (with a green checkmark) and "Not in this catalogue" (with a red X). To the right of the table is a sidebar with "Details" (Owner: Internal EQUELLA Demonstration System Administrator, Collection: Learning resources, Version: 1 (show all), Status: Live, Find uses, Sales history, Moderation history) and "Actions" (Modify key resource, Add to external system, Archive this version, Mark this for review, Suspend this version, Delete this version, Change ownership, **Edit catalogues** (highlighted with a red box and labeled "1."), Set pricing tiers, Export, Move item into another).

**Figure 30 Edit catalogues page**

The **Edit catalogues** page lists all catalogues (regardless of the MANAGE\_CATALOGUE ACL), with a **Status** and **Action**. The following statuses may display:

- **Auto** – the resource has been automatically added to the catalogue through an associated dynamic hierarchy. It can be excluded from the catalogue by clicking the **Exclude from catalogue** link.
- **Excluded** – the resource has been excluded from the catalogue. It can be removed from exclusions by clicking the **Remove from exclusions** link. *NOTE: If the resource matches the catalogue's associated dynamic hierarchy, as soon as it is removed from exclusions, it is added to the catalogue.*
- **Manual** – the resource has been manually added to the catalogue. It can be removed from manual additions by clicking the **Remove from manual additions** link. *NOTE: The resource will also be removed from the catalogue (unless it also matches the associated dynamic hierarchy criteria).*
- **None** – the resource is not currently in the catalogue. It can be added to the catalogue by clicking the **Add to catalogue** link. (See [Adding a single resource to catalogues](#) on page 35 for further information.)

## Add to catalogues

Resources can be manually added to catalogues, either individually or in bulk.

### Adding a single resource to catalogues

A resource can be added to one or more catalogues from the Resource summary page.

*NOTE: A user must be granted the MANAGE\_CATALOGUES ACL for at least one catalogue for this function to display.*

#### To add a resource to one or more catalogues

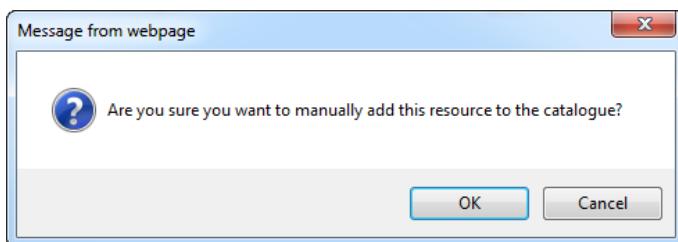
- From the Resource summary page, click the **Edit catalogue** link from the Actions menu. The **Edit catalogue** page displays, listing all catalogues with the resource's associated **Status** and the next available **Action**. An example is shown in Figure 31.

Edit catalogues			
Catalogue	Status	Action	
<input checked="" type="checkbox"/> Fine Arts	Manual	<a href="#">Remove from manual additions</a>	
<input checked="" type="checkbox"/> Literature	Auto	<a href="#">Exclude from catalogue</a>	
<input checked="" type="checkbox"/> Mathematics	Excluded	<a href="#">Remove from exclusions</a>	
<input checked="" type="checkbox"/> Science aids	Manual	<a href="#">Remove from manual additions</a>	
<input checked="" type="checkbox"/> Specials	None	<a href="#">Add to catalogue</a>	

In this catalogue       Not in this catalogue

**Figure 31 Edit catalogues page – Add to catalogue**

- For catalogues with a status of **None**, click the **Add to catalogue** link to manually add the resource to the catalogue (for example, *Specials*). A confirmation dialog display, as shown in Figure 32.



**Figure 32 Confirmation dialog**

- Click **OK**. The status now displays as *Manual*, and the next available action *Remove from manual additions*. An example is shown in Figure 33.

Catalogue ▾	Status	Action
<input checked="" type="checkbox"/> Fine Arts	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Literature	Auto	<a href="#">Exclude from catalogue</a>
<input checked="" type="checkbox"/> Mathematics	Excluded	<a href="#">Remove from exclusions</a>
<input checked="" type="checkbox"/> Science aids	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Specials	Manual	<a href="#">Remove from manual additions</a>

In this catalogue       Not in this catalogue

Figure 33 Resource manually added to **Specials** catalogue

## Adding multiple resources to catalogues

Multiple resources can be selected, then added to one or more catalogues using the bulk **Add to catalogues** action, accessed through the **Manage resources** function.

*NOTE: A user must be granted the MANAGE\_CATALOGUES ACL for at least one catalogue for this function to display.*

### To add multiple resources to one or more catalogues

1. Select **Manage resources** from the navigation menu. The **Manage resources** page displays.
2. Select the required resources by clicking **Select**, then click **Perform an action**. The **Bulk actions** dialog displays. An example is shown in Figure 34.

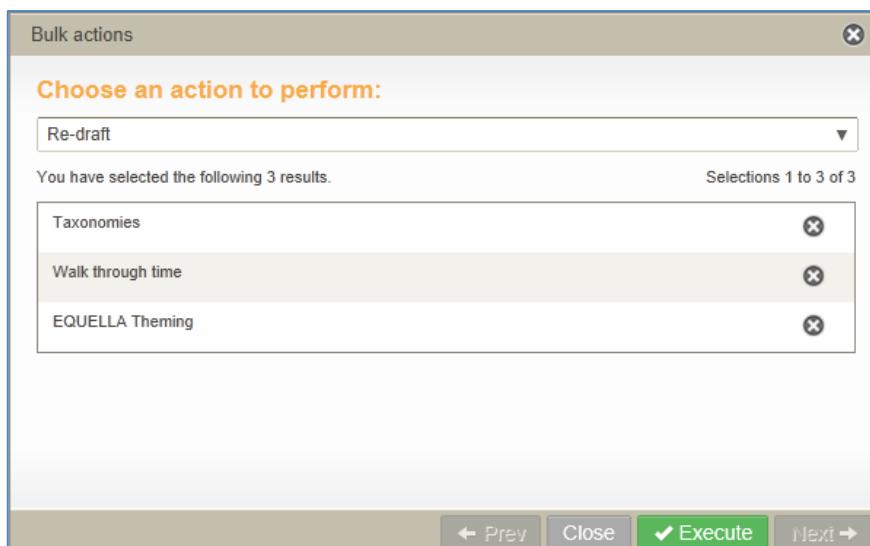
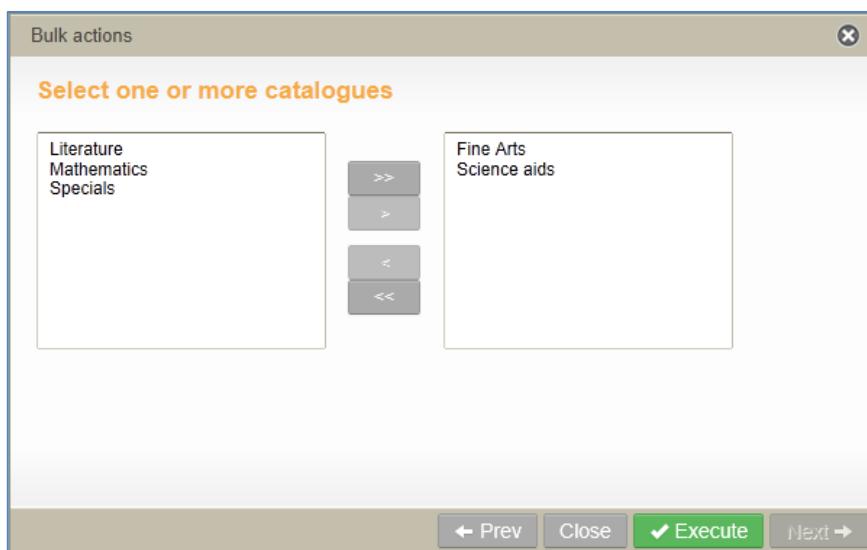


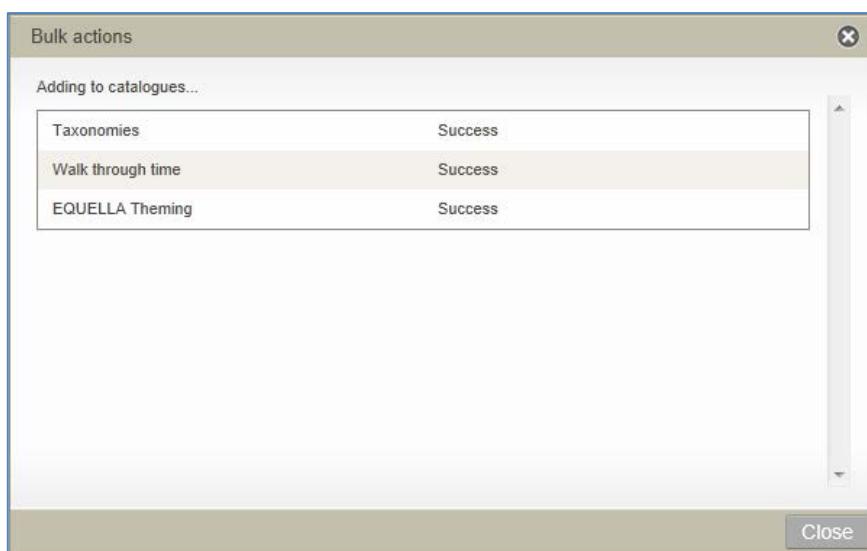
Figure 34 Bulk actions dialog

3. Select **Add to catalogues...** from the drop-down list then click **Next**.
4. The **Select one or more** catalogues dialog displays. An example is shown in Figure 35.



**Figure 35 Bulk action - Add to catalogues**

5. Select the catalogues to which the resources are to be added:
  - Click > to add selected catalogues to the right hand panel.
  - Click >> to add all catalogues to the right hand panel.
  - Click < to remove selected catalogues from the right hand panel.
  - Click << to remove all catalogues from the right hand panel.
6. Click > Execute . A confirmation dialog displays. Click OK to proceed.
7. The **Bulk actions** confirmation dialog displays. An example is shown in Figure 36.



**Figure 36 Bulk actions confirmation dialog**

8. Click Close .

*NOTE: If resources already added to the catalogue via an associated dynamic collection are added again through the Add to catalogues function, the resource's catalogue status*

updates to 'Manual'. If the resource is removed from manual additions, the status will change back to 'Auto'.

## Exclude from catalogue

Some resources that may match an associated dynamic collection's criteria may not be appropriate for specific catalogues or for sale in general. These resources can be excluded from one or more catalogues, which will prevent them from being automatically added to those catalogues.

Resources can be excluded from one or more catalogues either individually from the Resource summary page, or in bulk using the **Exclude from catalogues** bulk action through the **Manage resources** function.

*NOTE: A user must be granted the MANAGE\_CATALOGUES ACL for at least one catalogue for these functions to display.*

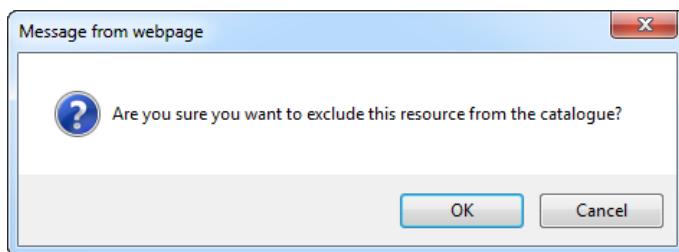
### To exclude a resource from one or more catalogues

1. From the Resource summary page, click the **Edit catalogue** link from the Actions menu. The **Edit catalogue** page displays, listing all catalogues with the resource's associated **Status** and the next available **Action**. An example is shown in Figure 37.

Edit catalogues			
Catalogue	Status	Action	
✓ Fine Arts	Manual	Remove from manual additions	
✓ Literature	Auto	Exclude from catalogue	
✗ Mathematics	Excluded	Remove from exclusions	
✓ Science aids	Manual	Remove from manual additions	
✗ Specials	None	Add to catalogue	

**Figure 37 Edit catalogues page – Exclude from catalogue**

2. For catalogues with a status of **Auto**, click the **Exclude from catalogue** link to exclude the resource. A confirmation dialog displays, as shown in Figure 38.



**Figure 38 Confirmation dialog**

3. Click **OK**. The status now displays as *Excluded*, and the next available action *Remove from exclusions*. An example is shown in Figure 39.

Edit catalogues

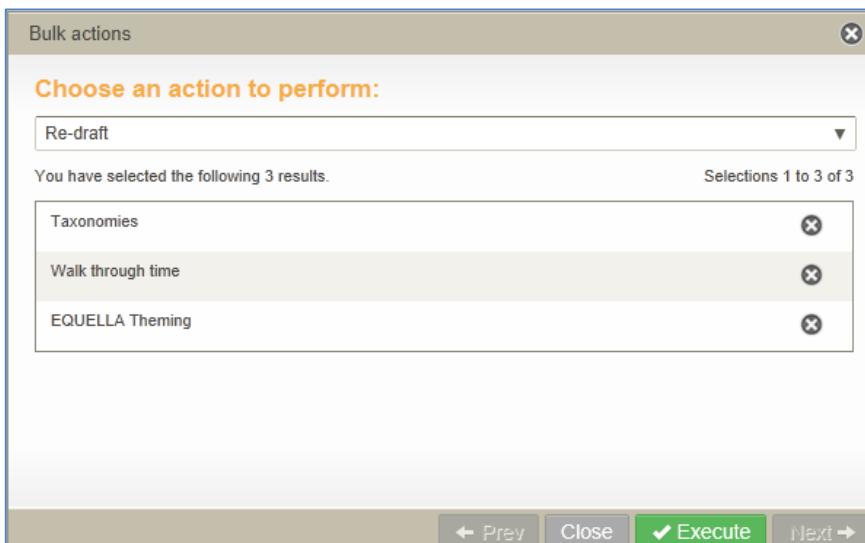
Catalogue ▾	Status	Action
<input checked="" type="checkbox"/> Fine Arts	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Literature	Excluded	<a href="#">Remove from exclusions</a>
<input checked="" type="checkbox"/> Mathematics	Excluded	<a href="#">Remove from exclusions</a>
<input checked="" type="checkbox"/> Science aids	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Specials	None	<a href="#">Add to catalogue</a>

In this catalogue       Not in this catalogue

**Figure 39 Edit catalogues - Excluded**

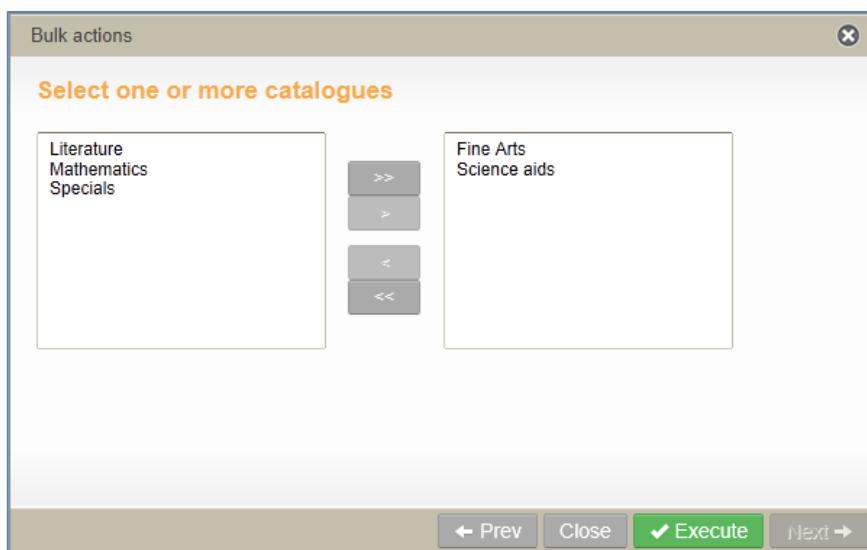
To exclude multiple resources from one or more catalogues

1. Select **Manage resources** from the navigation menu. The **Manage resources** page displays.
2. Select the required resources by clicking  **Select**, then click . The **Bulk actions** dialog displays. An example is shown in Figure 40.



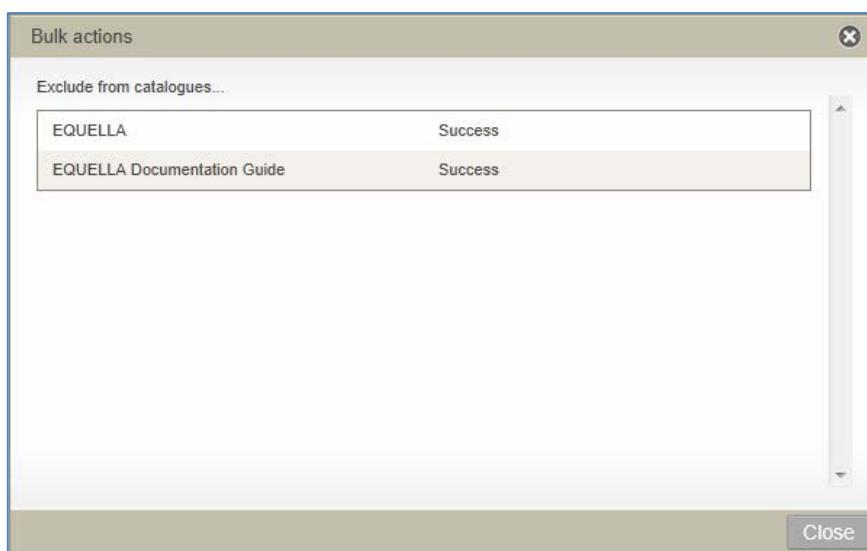
**Figure 40 Bulk actions dialog**

3. Select **Exclude from catalogues...** from the drop-down list then click .
4. The **Select one or more** catalogues dialog displays. An example is shown in Figure 41.



**Figure 41 Bulk action – Exclude from catalogues**

5. Select the catalogues from which the resources are to be excluded:
  - Click > to add selected catalogues to the right hand panel.
  - Click >> to add all catalogues to the right hand panel.
  - Click < to remove selected catalogues from the right hand panel.
  - Click << to remove all catalogues from the right hand panel.
6. Click > Execute . A confirmation dialog displays. Click OK to proceed.
7. The **Bulk actions** confirmation dialog displays. An example is shown in Figure 42.



**Figure 42 Bulk actions confirmation dialog**

8. Click Close .

## Remove from exclusions

Resources that have previously been excluded from one or more catalogues have a status of **Excluded**. These resources can be removed from exclusions, so that they can be added to a catalogue manually or automatically via an associated dynamic collection.

*NOTE: A user must be granted the MANAGE\_CATALOGUES ACL for at least one catalogue for this function to display.*

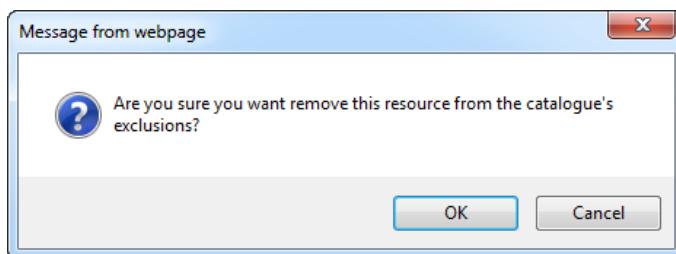
### To remove a resource from exclusions

1. From the Resource summary page, click the **Edit catalogue** link from the Actions menu. The **Edit catalogue** page displays, listing all catalogues with the resource's associated **Status** and the next available **Action**. An example is shown in Figure 43.

Edit catalogues			
Catalogue ▾	Status	Action	
Fine Arts	Manual	<a href="#">Remove from manual additions</a>	
Literature	Auto	<a href="#">Exclude from catalogue</a>	
Mathematics	Excluded	<a href="#">Remove from exclusions</a>	
Science aids	Manual	<a href="#">Remove from manual additions</a>	
Specials	None	<a href="#">Add to catalogue</a>	
In this catalogue			Not in this catalogue

**Figure 43 Edit catalogues page - Remove from exclusions**

2. For catalogues with a status of **Excluded**, click the **Remove from exclusions** link to remove the resource from the selected catalogue's exclusions. A confirmation dialog displays, as shown in Figure 44.



**Figure 44 Confirmation dialog**

3. Click **OK**. The status now displays as either *Auto* (if the resource matches the associated dynamic collection) with an action of **Exclude from catalogue** or *None* with an action of **Add to catalogue**. An example is shown in Figure 43.

Edit catalogues

Catalogue ▾	Status	Action
<input checked="" type="checkbox"/> Fine Arts	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Literature	Auto	<a href="#">Exclude from catalogue</a>
<input checked="" type="checkbox"/> Mathematics	Auto	<a href="#">Exclude from catalogue</a>
<input checked="" type="checkbox"/> Science aids	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Specials	None	<a href="#">Add to catalogue</a>

In this catalogue       Not in this catalogue

Figure 45 Edit catalogues - Removed from exclusions

## Remove from manual additions

Resources that have previously been added to one or more catalogues using either the **Edit catalogue** function from the Action menu on the Resource summary page or the bulk **Add to catalogues** action from the **Manage resources** page can be removed from the manual additions for a catalogue.

*NOTE: A user must be granted the MANAGE\_CATALOGUES ACL for at least one catalogue for this function to display.*

To remove a resource from manual additions

- From the Resource summary page, click the **Edit catalogue** link from the Actions menu. The **Edit catalogue** page displays, listing all catalogues with the resource's associated **Status** and the next available **Action**. An example is shown in Figure 46.

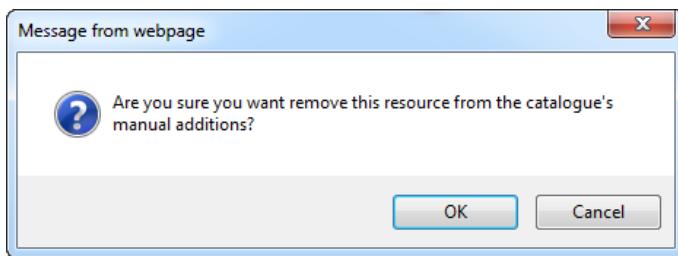
Edit catalogues

Catalogue ▾	Status	Action
<input checked="" type="checkbox"/> Fine Arts	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Literature	Auto	<a href="#">Exclude from catalogue</a>
<input checked="" type="checkbox"/> Mathematics	Excluded	<a href="#">Remove from exclusions</a>
<input checked="" type="checkbox"/> Science aids	Manual	<a href="#">Remove from manual additions</a>
<input checked="" type="checkbox"/> Specials	None	<a href="#">Add to catalogue</a>

In this catalogue       Not in this catalogue

Figure 46 Edit catalogues page - Removed from manual additions

- For catalogues with a status of **Manual**, click the **Remove from manual additions** link to remove the resource from the selected catalogue's manual additions. A confirmation dialog displays, as shown in Figure 47.



**Figure 47 Confirmation dialog**

3. Click **OK**. The status now displays as either *None* with an action of **Add to catalogue** or *Auto* (if the resource matches the associated dynamic collection) with an action of **Exclude from catalogue**. An example is shown in Figure 48.

A screenshot of a web-based application titled 'Edit catalogues'. A table lists resources categorized by 'Catalogue': Fine Arts (Manual, Remove from manual additions), Literature (Excluded, Remove from exclusions), Mathematics (Auto, Exclude from catalogue), Science aids (None, Add to catalogue), and Specials (None, Add to catalogue). The 'Science aids' row is highlighted with a red border. Below the table, there are two buttons: 'In this catalogue' (with a green checkmark) and 'Not in this catalogue' (with a red X).

**Figure 48 Edit catalogues - Removed from manual additions**

## Set pricing tiers

Pricing tiers are created at a global level, and more than one pricing model can be used within a store. (See [Pricing tiers](#) on page 17 for further information.) Pricing tiers are set at an individual resource level through the **Set pricing tiers** option from the **Resource summary** page **Actions** menu, or for multiple resources by selecting the **Set pricing tiers** bulk action accessed from the **Manage resources** page.

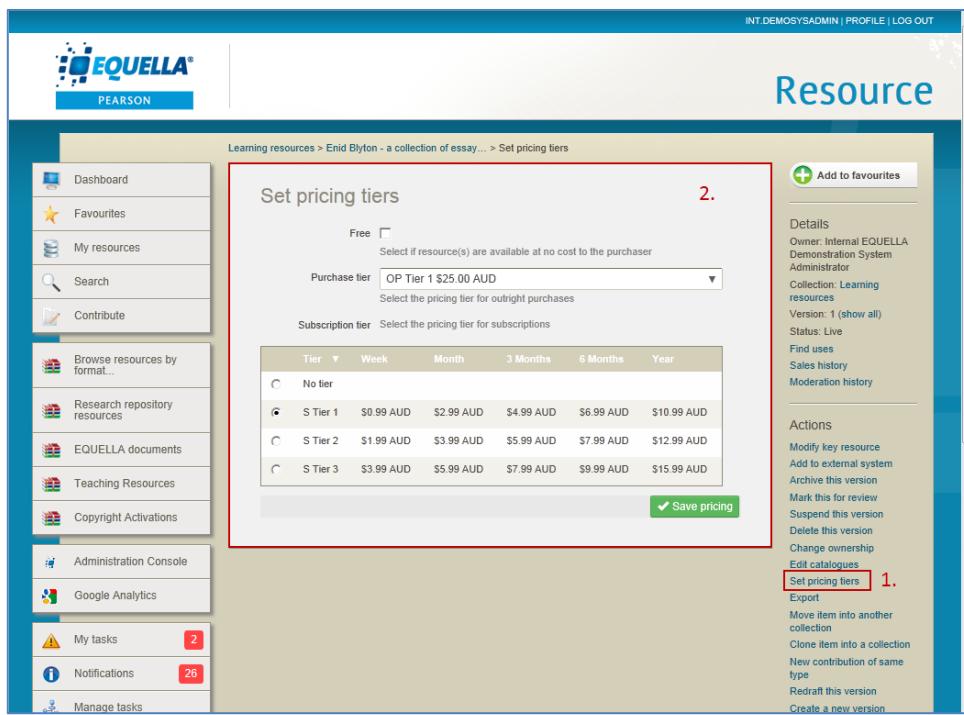
*NOTE: Catalogue resources that have no pricing tiers set do not display at the store front.*

If more than one pricing model has been configured for the store, the user can select a pricing tier for each of the configured pricing models.

*NOTE: A user must be granted the SET\_TIER\_FOR\_ITEM ACL for these functions to display.*

### To set pricing tiers for a resource

1. From the Resource summary page, click the **Set pricing tiers** link from the Actions menu. The **Set pricing tiers** page displays. An example is shown in Figure 49.

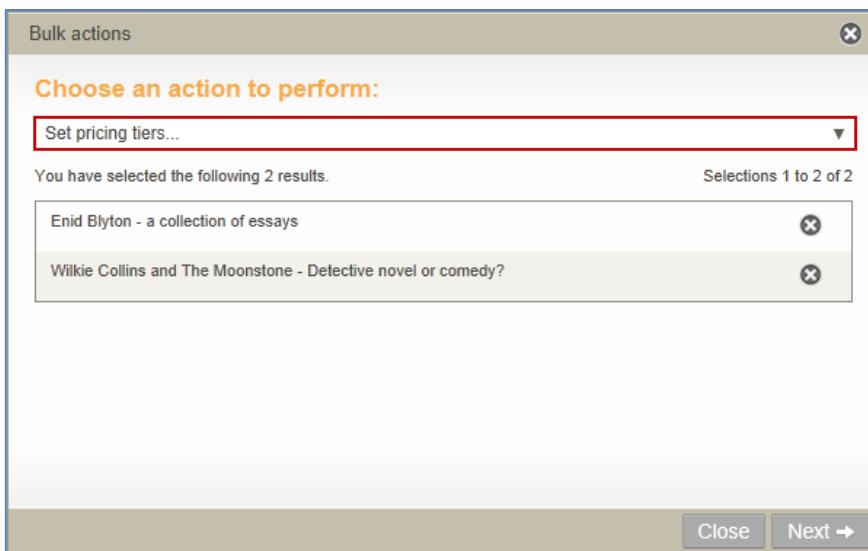


**Figure 49 Set pricing tiers page**

2. Select the required pricing tier for each available pricing model:
  - **Free** – select the Free checkbox to make the resource available at no cost to the purchaser. *NOTE: If Free is selected in combination with another pricing model, the resource will show only as 'Free' for store fronts where Free is enabled as a transaction type. For store fronts where Free is not enabled as a transaction type, the alternative pricing tier/s display. See [Store front registrations](#) on page 28 for further details.*
  - **Purchase tier** – select an Outright purchase tier from the table, if relevant.
  - **Subscription tier** – select a Subscription tier from the table, if relevant.
3. Click **✓ Save pricing**.

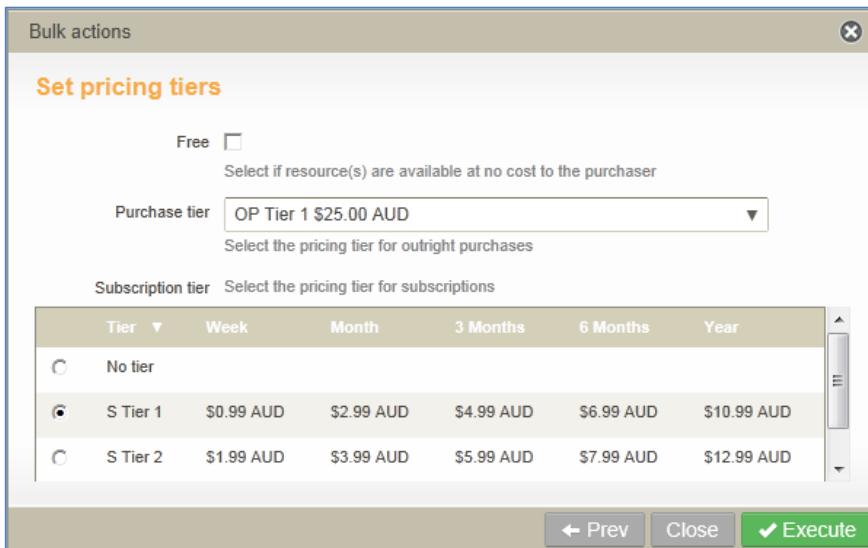
### To set pricing tiers for multiple resources

1. Select **Manage resources** from the navigation menu. The **Manage resources** page displays.
2. Select the required resources by clicking **Select**.  
*NOTE: Existing pricing tiers for selected resources will be overwritten with the pricing tiers selected during the bulk action.*
3. Click **Perform an action**. The **Bulk actions** dialog displays. An example is shown in Figure 50.



**Figure 50 Bulk actions dialog**

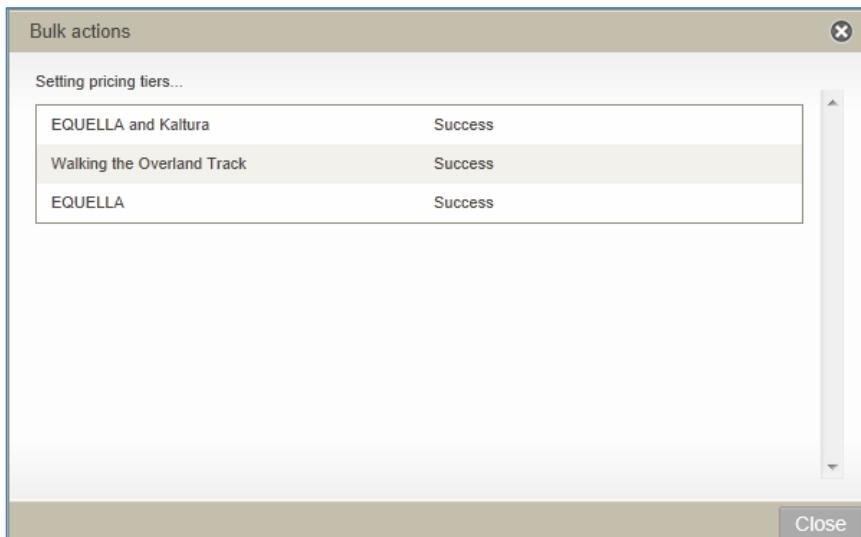
4. Select **Set pricing tiers...** from the drop-down list then click **Next →**. The **Select pricing tiers** dialog displays. An example is shown in Figure 51.



**Figure 51 Select pricing tiers dialog**

5. Select the required pricing tier for each available pricing model:
  - **Free** – select the Free checkbox to make the resource available at no cost to the purchaser. *NOTE: If Free is selected in combination with another pricing model, the resource will show only as 'Free' for store fronts where Free is enabled as a transaction type. For store fronts where Free is not enabled as a transaction type, the alternative pricing tier/s display. See [Store front registrations](#) on page 28 for further details.*
  - **Purchase tier** – select an Outright purchase tier from the table, if relevant.
  - **Subscription tier** – select a Subscription tier from the table, if relevant.

6. Click **✓ Execute**. A confirmation dialog displays. Click **OK** to proceed. The **Bulk actions** page displays the resources that have been updated. An example is shown in Figure 52.



**Figure 52 Bulk actions confirmation dialog**

7. Click **Close**.

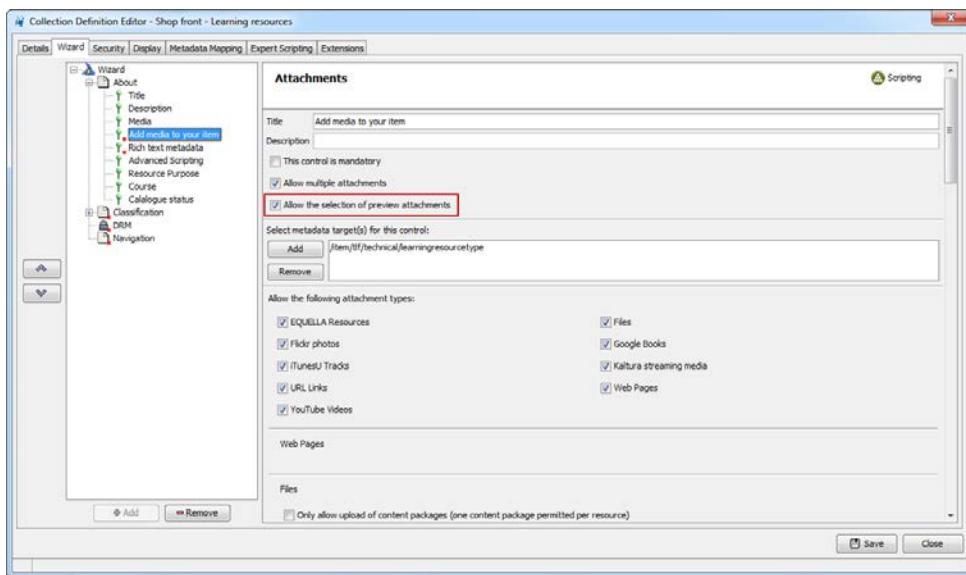
## Mark preview attachments

Catalogue resources may include attachments that are used to preview the content that is available for purchase or subscription. Users can mark attachments as *preview* attachments, which displays them as links that the user at the store front can open and view. Attachments not marked as preview attachments are also listed at the store front, but not as links. (See the *EQUELLA 6.0 Store Front User Guide* for further information.)

An option on the attachments control enables the Preview checkbox to display for attachments.

### To enable the Preview checkbox for attachments

1. From the **Collection Definition Editor** in the **Admin Console**, open the relevant attachment control. An example is shown in Figure 53.



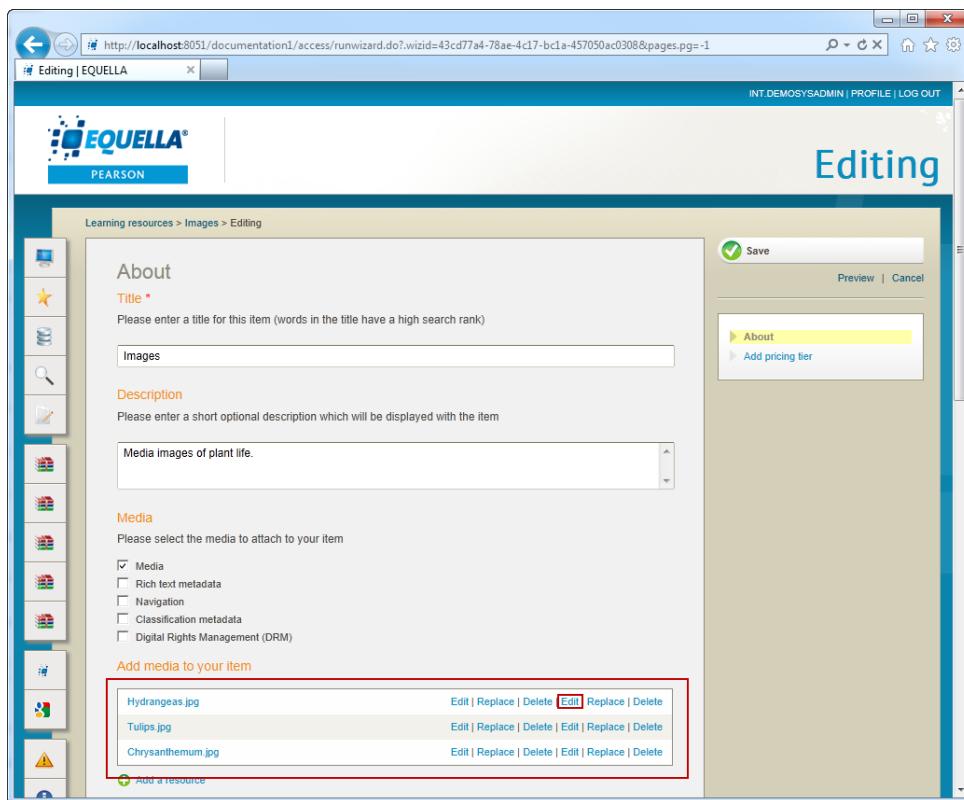
**Figure 53 Attachment control - Preview option**

2. Select the **Allow the selection of preview attachments** checkbox.
3. Click **Save**.

The **Preview** checkbox now displays for attachments added using this attachment control.

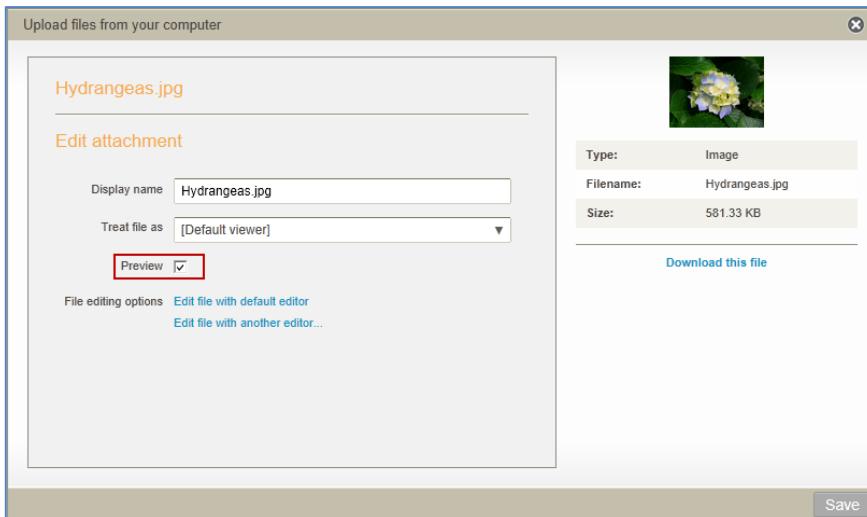
### To mark existing attachments as preview attachments

1. From the Resource summary page, click the **Edit this version** link from the Actions menu. The **Editing** page displays, with the attachments listed under the attachment control. An example is shown in Figure 54.



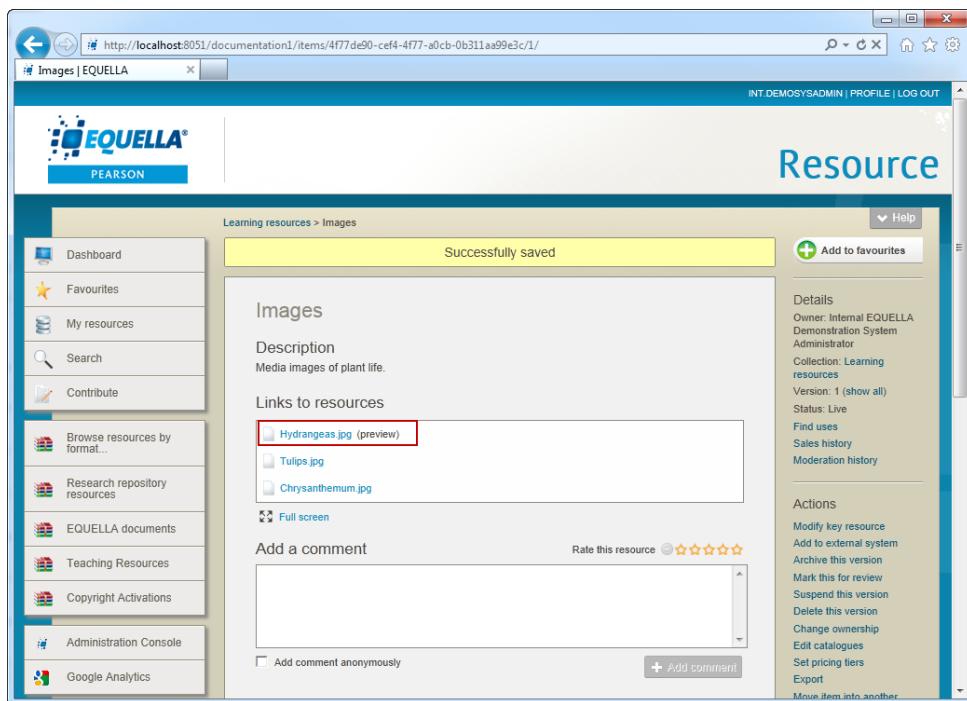
**Figure 54** Editing page

- Click the **Edit** link beside the attachment to be marked as a preview. The relevant **Edit attachment** dialog displays (depending on attachment type). An example is shown in Figure 55.



**Figure 55** Edit attachment dialog

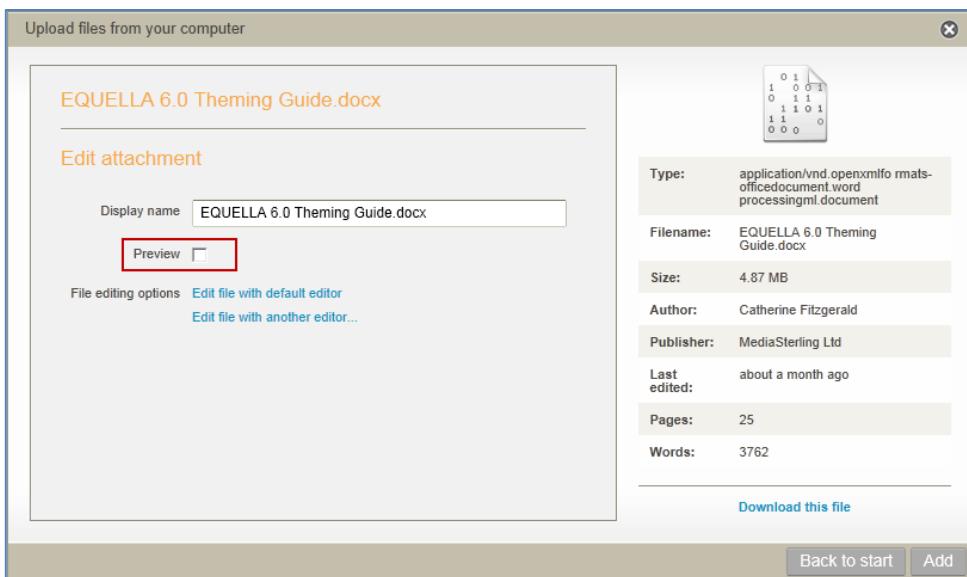
- Select the **Preview** checkbox, as highlighted in Figure 55, then click **Save**.
- Click the **Save** button to save the editing changes. The Resource summary page displays, and the preview attachments display with *(preview)* beside them. An example is shown in Figure 56.



**Figure 56 Resource summary page with preview attachment**

### To mark preview attachment during contribution

1. From the relevant contribution page, click the **Add a resource** link, then select the **Resource type** (e.g. *Upload a file*).
2. Click **Browse** and find and select the required file (e.g. *EQUELLA 6.0 Theming Guide*), then click . The **Edit attachment** dialog displays. An example is shown in Figure 57.



**Figure 57 Edit attachment dialog**

3. Select the **Preview** checkbox, as highlighted in Figure 57, then click **Add**. The attachment is added to the attachment control, with (preview) displayed beside it. An example is shown in Figure 58.

The screenshot shows a user interface for adding media to an item. At the top, there's a section titled "Media" with the instruction "Please select the media to attach to your item". Below this is a list of options with checkboxes: "Media" (which is checked), "Rich text metadata", "Navigation", "Classification metadata", and "Digital Rights Management (DRM)". Below the list is a button labeled "Add media to your item". At the bottom of the interface, there's a preview box containing the file name "EQUELLA 6.0 Theming Guide.docx (preview)" and a red-bordered "Edit | Replace | Delete" button. To the right of the preview box is another "Edit | Replace | Delete" button. At the very bottom left is a "Add a resource" button.

**Figure 58 Attachment control during contribution**

## View a resource's catalogue and pricing details

Once resources have been added to a catalogue, either automatically through an associated dynamic collection or manually, and the pricing tiers have been set, pricing and catalogue information can be viewed from the Resource summary page. Pricing tiers also display on results pages.

*NOTE: The VIEW\_PRICING\_TIERS ACL is required to view pricing tier details.*

An example of the Resource summary page with pricing and catalogue details is shown in Figure 59.

The screenshot shows the EQUELLA Resource summary page for a resource titled 'Images'. The left sidebar contains navigation links such as Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format..., Research repository resources, EQUELLA documents, Teaching Resources, Copyright Activations, Administration Console, and Google Analytics. A notifications section shows 4 tasks and 11 notifications. The main content area displays the resource details, links to resources (Hydrangeas.jpg, Tulips.jpg, Chrysanthemum.jpg), an add comment section, and a rating bar. A red box highlights the 'Pricing tiers' and 'Catalogues' sections. The 'Pricing tiers' section shows a purchase tier for OP Tier 1 at \$25.00 AUD. The 'Catalogues' section lists Science aids, Fine Arts, and Mathematics. The right sidebar shows resource details (Owner: Internal EQUELLA Demonstration System Administrator, Collection: Learning resources, Version: 1 (show all), Status: Live) and actions (Modify key resource, Add to external system, Archive this version, Mark this for review, Suspend this version, Delete this version, Change ownership, Edit catalogues, Set pricing tiers, Export, Move item into another collection, Clone item into a collection, New contribution of same type, Redraft this version, Create a new version, Edit this version).

**Figure 59 Resource summary page with pricing and catalogue details**

An example of a results page with pricing tier information displayed is shown in Figure 60.

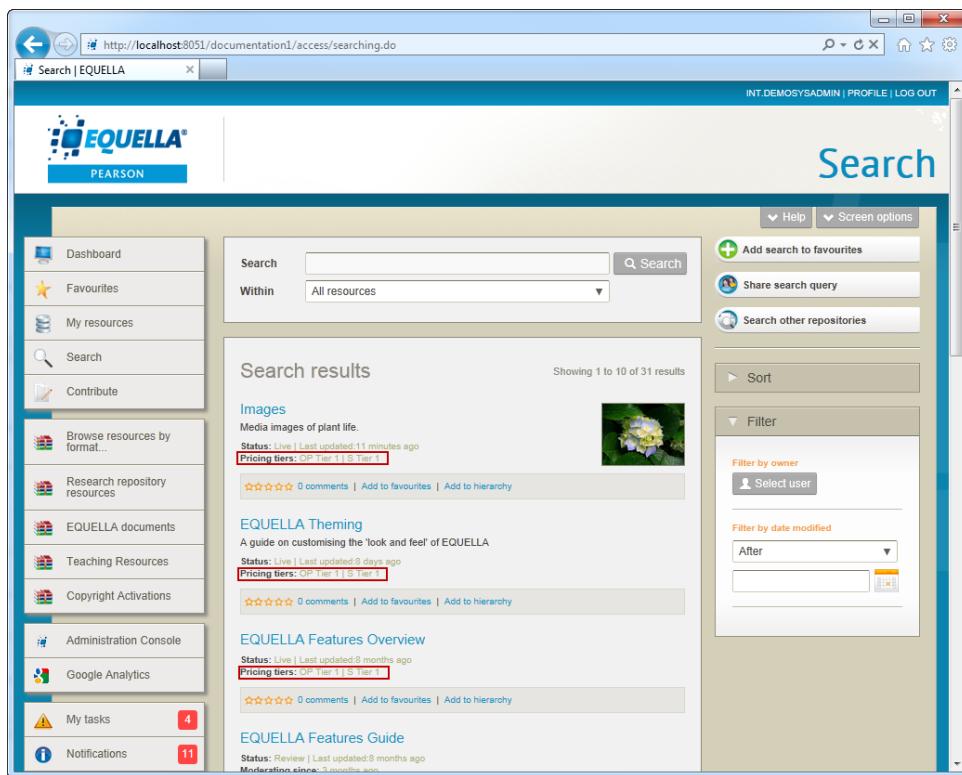


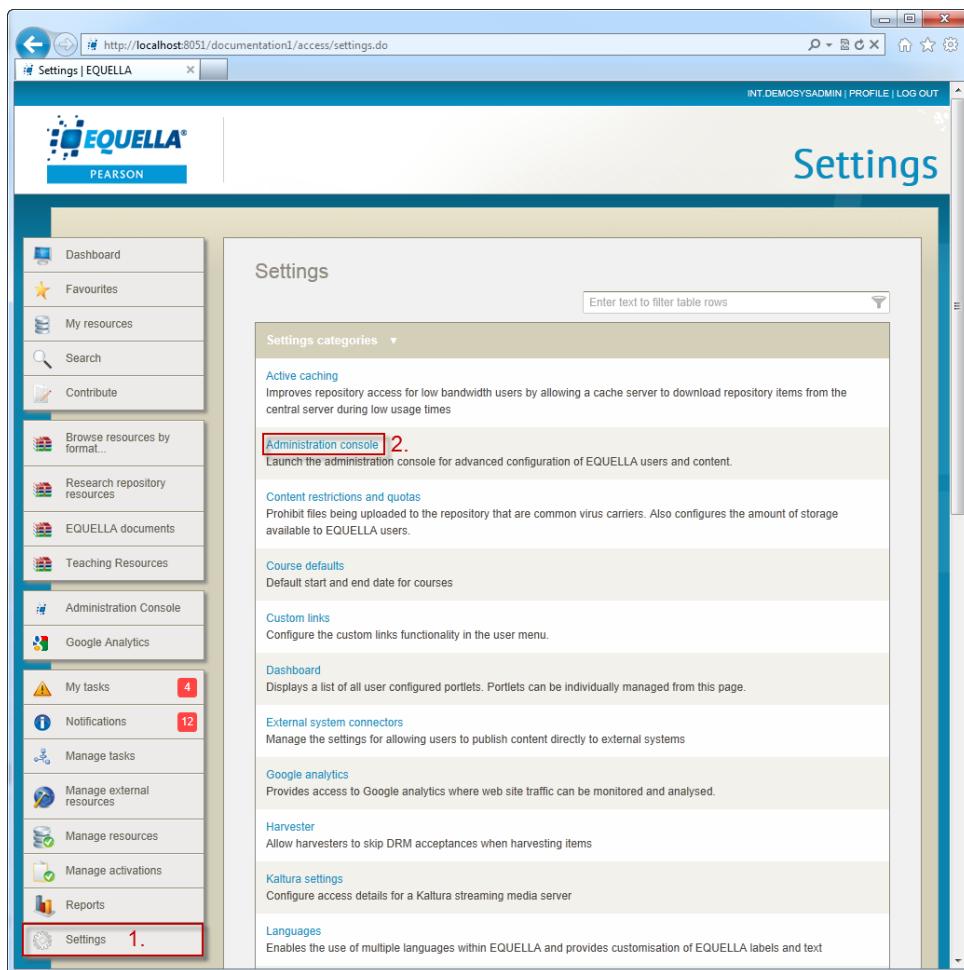
Figure 60 Results page with pricing tier information displayed

## Configuring collections to display pricing tier information

To enable pricing and catalogue information to display on the resource summary page, pricing details display options must be configured in the Collection Definitions Editor for the relevant collections.

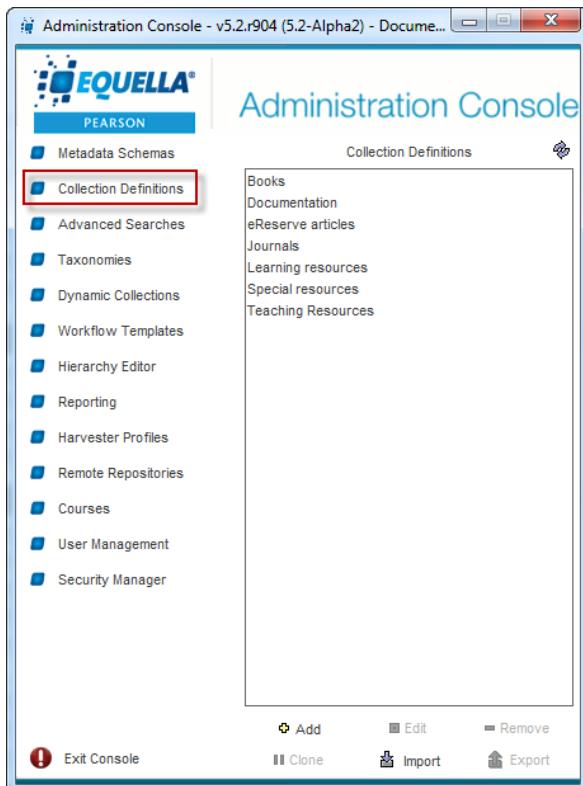
### To configure Purchase display options

1. Log in to EQUELLA as an administrator, select **Settings** then **Administration console**, as shown in Figure 61.



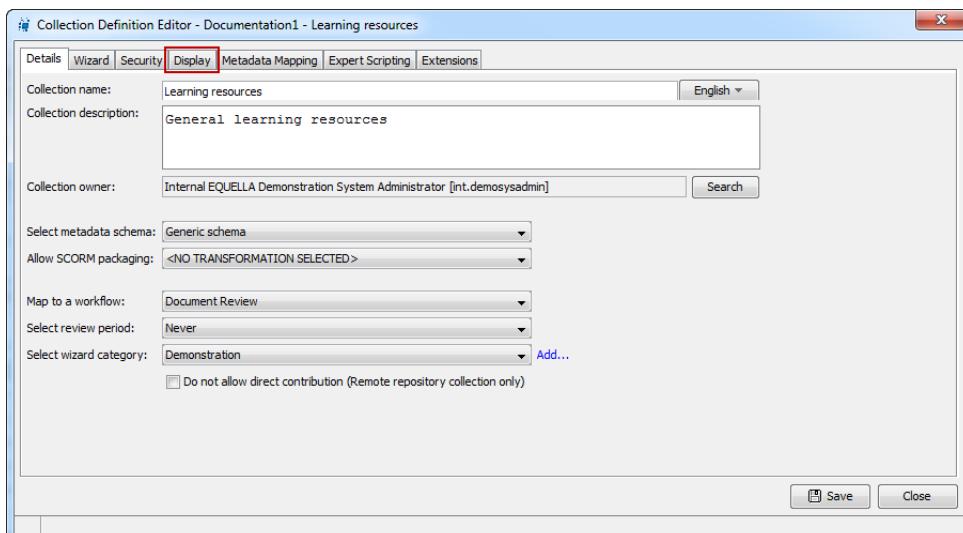
**Figure 61 Open Administration console**

2. The Administration console displays. Select **Collection Definitions** to display a list of collections, as shown in Figure 62.



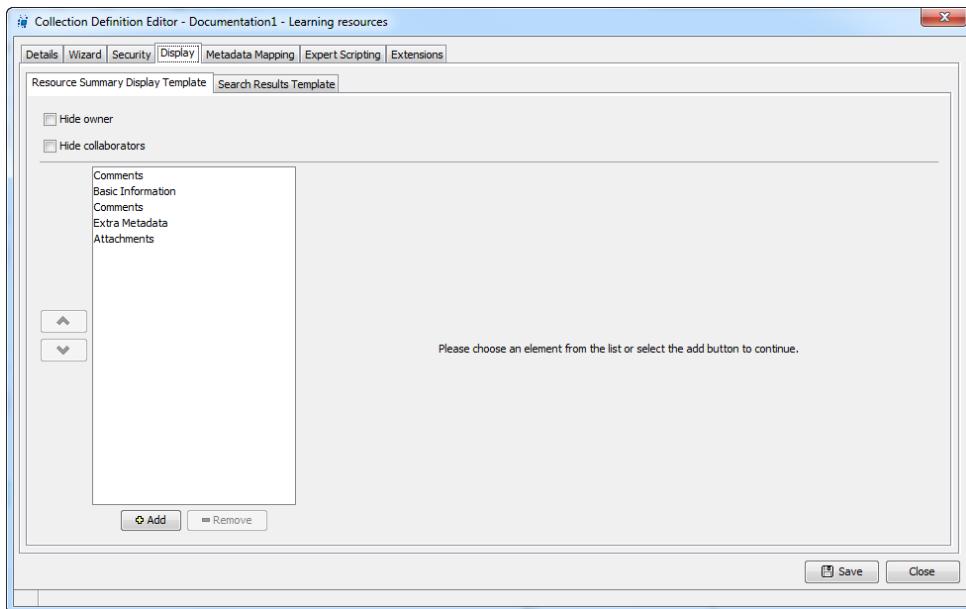
**Figure 62 Administration Console—Collection Definitions pane**

3. Select the required collection then click (or double-click on a collection name) to display the **Collection Definition Editor**. An example is shown in Figure 63.



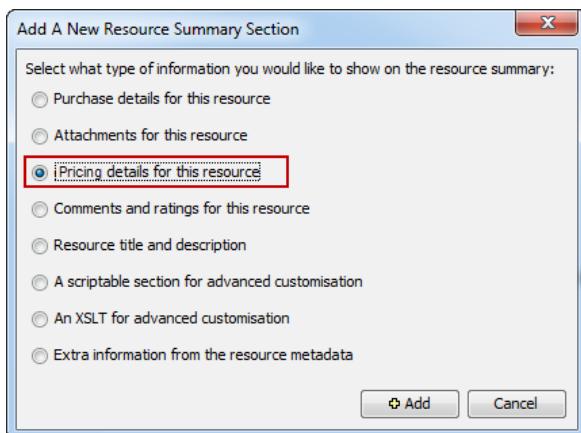
**Figure 63 Collection definition editor**

4. Click the **Display** tab to display the **Resource Summary Display Template** page. An example is shown in Figure 64.



**Figure 64 Resource Summary Display Template**

5. Click . The **Add A New Resource Summary Section** dialog displays. An example is shown in Figure 65.



**Figure 65 Add A New Resource Summary Section dialog**

6. Select **Pricing details for this resource** then click . **Pricing Information** displays in the panel.
7. Click to save the changes, then to close the Collection Definition Editor. The pricing tier and catalogue information now displays on the resource summary page for resources belonging to the configured collection, as shown in Figure 59.

## Manage catalogue resources

Catalogues and their associated resources can be viewed, filtered and managed through the **Manage resources** function. Resources can be filtered by *catalogue*, *catalogue status*, *pricing model*, *catalogue membership* and *pricing*.

In addition, there are three bulk actions specific to catalogue resources available from the **Manage resources** function:

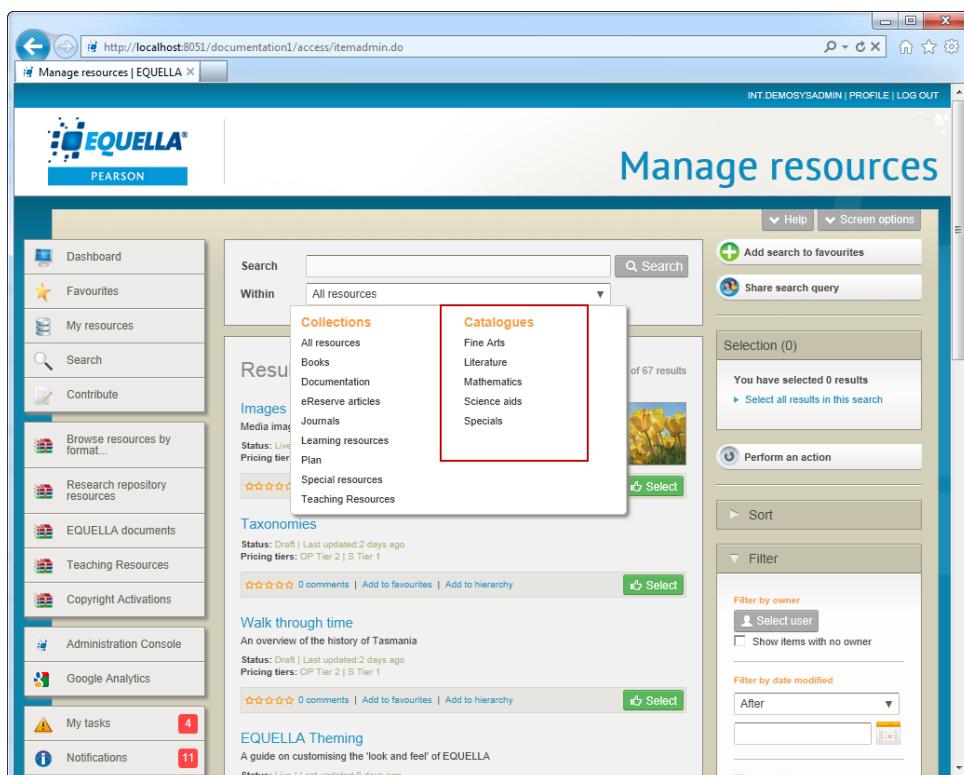
- **Add to catalogues** – see [Adding multiple resources to catalogues](#) on page 35.
- **Exclude from catalogues** – see [To exclude multiple resources from one or more catalogues](#) on page 39.
- **Set pricing tiers** – see [To set pricing tiers for multiple resources](#) on page 44.

## Viewing catalogue resources

*NOTE: The MANAGE\_CATALOGUES ACL is required to access catalogue functionality within Manage Resources.*

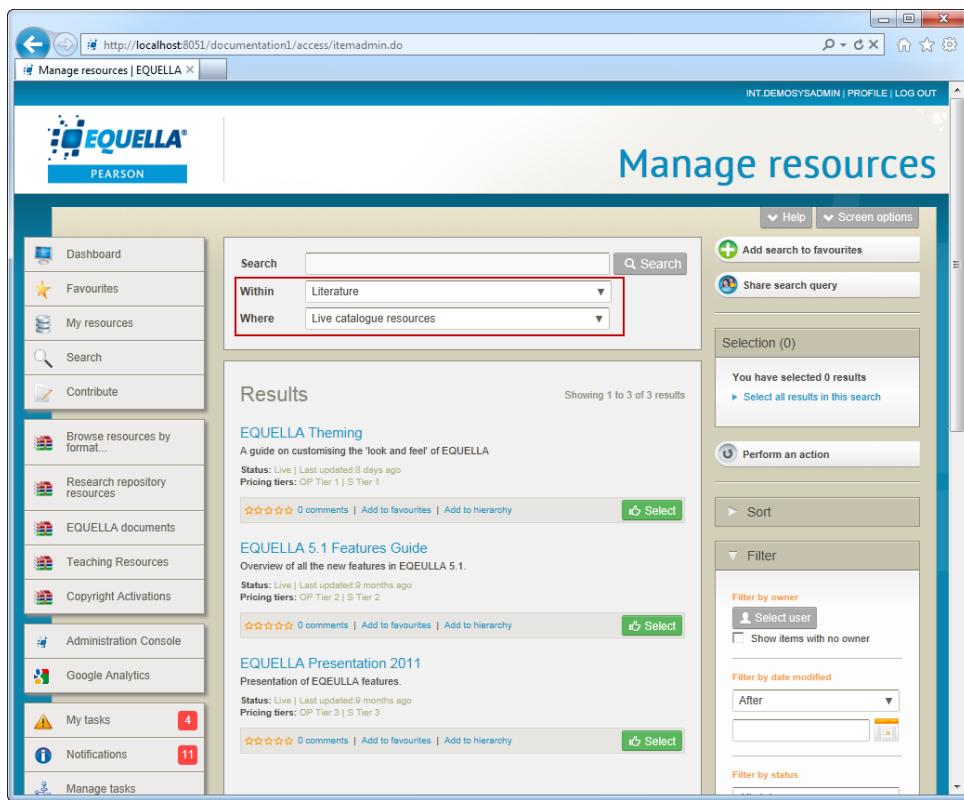
### To view a catalogue

1. Select **Manage resources** from the navigation menu. The **Manage resources** page displays.
2. Click the **Within** dropdown in the search panel, and select the required catalogue from the **Catalogues** list (e.g. *Literature*). An example is shown in Figure 66.



**Figure 66** Manage resources - Within drop-down

The catalogue's live resources display in the search results. An example is shown in Figure 67.



**Figure 67 Catalogue search results**

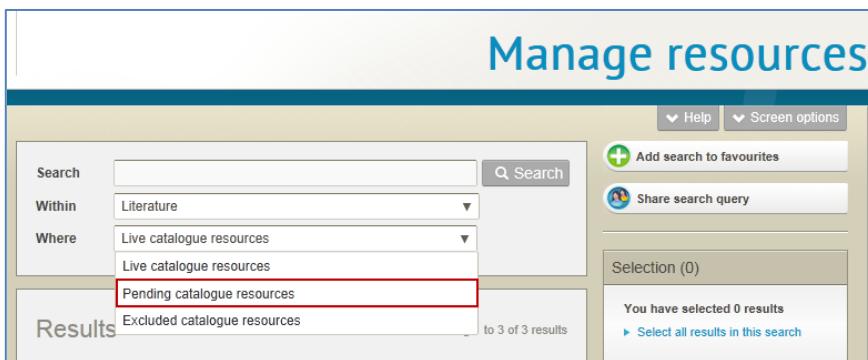
**NOTE:** Live catalogue resources is the default search result view once a catalogue is selected.

**NOTE:** Live catalogue resources are resources that display at the store front. They have both a pricing tier set AND a resource status of 'live'.

### To view a catalogue's pending resources

**NOTE:** Pending catalogue resources are resources that have been added to the catalogue but don't display at the shop front. A catalogue resource is pending if it has no pricing tier set and/or it has a resource status other than 'live' (e.g. moderating, suspended etc.).

1. Select **Manage resources** from the navigation menu. The **Manage resources** page displays.
2. Click the **Within** dropdown in the search panel, and select the required catalogue from the **Catalogues** list.
3. A **Where** drop-down displays under the **Within** drop-down, with the default value of 'Live catalogue resources'. Click the drop-down and select 'Pending catalogue resources' from the list. An example is shown in Figure 68.

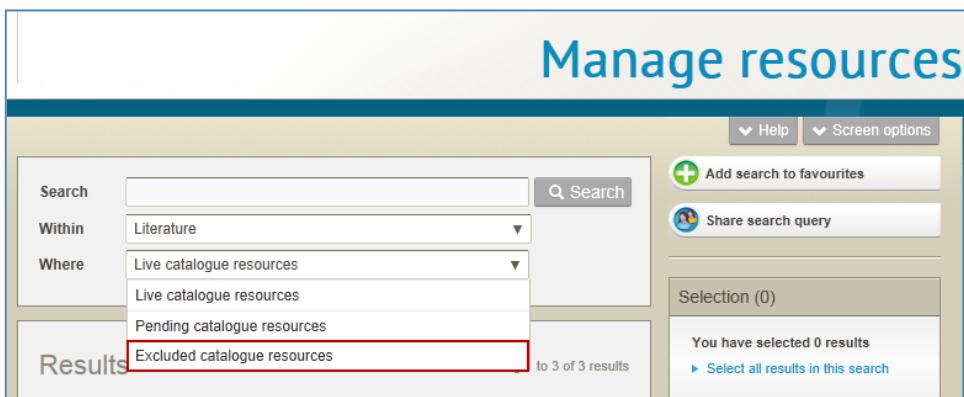


**Figure 68 Manage resources – Pending catalogue resources**

The catalogue's pending resources display in the search results.

#### To view a catalogue's excluded resources

1. Select **Manage resources** from the navigation menu. The **Manage resources** page displays.
2. Click the **Within** dropdown in the search panel, and select the required catalogue from the **Catalogues** list.
3. A **Where** drop-down displays under the **Within** drop-down, with the default value of '*Live catalogue resources*'. Click the drop-down and select '*Excluded catalogue resources*' from the list. An example is shown in Figure 69.



**Figure 69 Manage resources - Excluded catalogue resources**

All resources that have been excluded from the catalogue display in the search results.

### Filtering catalogue resources

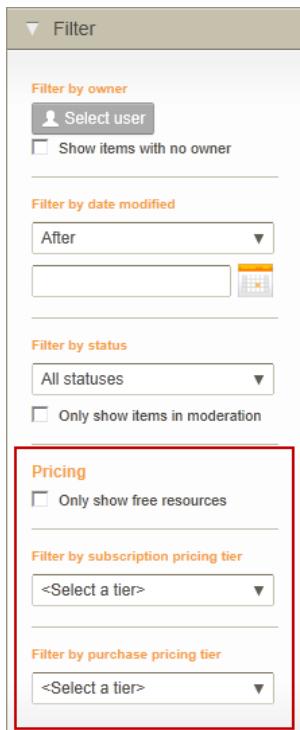
A number of filters are available to assist users to drill down to specific properties for catalogue resources.

*NOTE: The MANAGE\_CATALOGUE ACL is required for at least one catalogue to access the catalogue specific filtering options.*

In addition to the standard filtering options, the following options are available in the **Filter** box from the general Manage resources page:

- **Pricing** – Selecting *Only show free resources* displays resources where the pricing model of **Free** is selected.
- **Filter by subscription pricing tier** – select the required subscription tier from the drop-down list. Only resources with a matching pricing tier display.
- **Filter by purchase pricing tier** – select the required purchase pricing tier from the drop-down list. Only resources with a matching pricing tier display.

An example is shown in Figure 70.



**Figure 70 Pricing filters**

Once a catalogue is selected from the **Within** drop-down, the following option is also available in the **Filter** box:

- **Catalogue membership**
  - **Manual additions** - select to view only resources that have been added to the selected catalogue via either the **Edit catalogue – Add to catalogue** function or the **Add to catalogue** bulk action in Manage resources. These resources have a catalogue status of **Manual**.
  - **Auto inclusions** – select to view only resources that have been added to the selected catalogue automatically via the catalogue's associated dynamic collection. These resources have a catalogue status of **Auto**.

An example is shown in Figure 71.

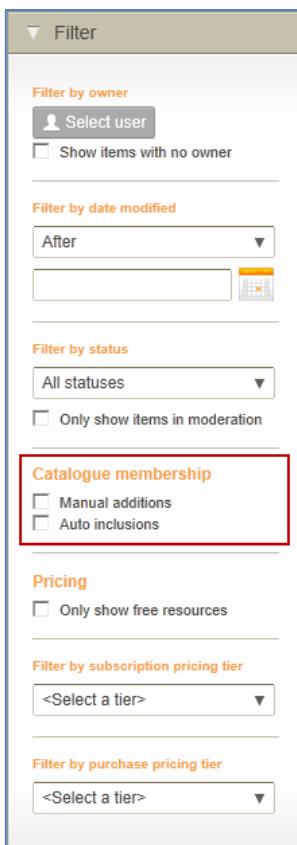


Figure 71 Catalogue member filter options

## View sales history

The sales history for a resource can be displayed from the Resource summary page.

*NOTE: The VIEW\_SALES\_FOR\_ITEM ACL must be granted to access this function.*

### To view the sales history for a resource

1. From the Resource summary page, select the **Sales history** link from the **Details** sections. The **Sales history** page displays. An example is shown in Figure 72.

Copy of Learning resources > LunchBothSubs > Sales history

Date Purchased ▾	Store front	Transaction	Total
30/08/12	SF1/4	Purchase	\$160.00 AUD
30/08/12	SF1/4	Subscription	\$20.00 AUD

Add to favourites

Share with others

Details

Owner: Internal EQUELLA Demonstration System Administrator

Collection: Copy of Learning resources

Version: 1 (show all)

Status: Live

**Sales history**

Moderation history

Figure 72 Sales history page

## Contact Client Support

We are always happy to help.

If your organisation has a support agreement with EQUELLA then help is available at <http://support.equella.com/>.