

EQUELLA®

# Administration Overview Guide

*Version 6.4*

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# Administration overview

The purpose of this guide is to provide system administrators with an understanding of the EQUELLA administration and management tools. The tools described in this document include the:

- **Administration Console**—for managing EQUELLA institution content, users and security.
- **Institution Manager**—for managing multiple EQUELLA institutions on the same server.
- **Settings page**—to manage various parts of the EQUELLA institution.

Please note that this guide has been developed to best reflect the full capabilities of EQUELLA and as such may differ in appearance to your own installation.

Information on institution management is provided in the *EQUELLA Installation and Administration Guide*.

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## Administration Console

The EQUELLA Administration Console provides a range of tools and plug-ins that simplify the management and configuration of EQUELLA.

To access EQUELLA and open the Administration Console

1. Open a browser and enter your EQUELLA URL (e.g. '<http://equella.myequellainstitution.edu>').
2. Log in to EQUELLA as an administrator, select **Settings** then **Administration console**, as shown in Figure 1.

The screenshot shows the EQUILLA Settings page. On the left is a navigation sidebar with various options like Dashboard, Favourites, My resources, etc. A red box labeled '1' highlights the 'Settings' option at the bottom of the sidebar. On the right, under the 'Settings' heading, there's a table with several rows. One row, labeled '2', has a red border around it and contains the 'Administration console' link, which is also highlighted with a red box.

**Figure 1 Settings page - Administration console**

The **Administration console** displays, as shown in Figure 2.

The screenshot shows the EQUILLA Administration Console. The title bar says 'Administration Console - v6.4.r1088 (6.4-Alpha)...'. The main area is titled 'Administration Console' and contains a vertical list of management modules, each with a blue square icon: Metadata Schemas, Collection Definitions, Advanced Searches, Dynamic Collections, Taxonomies, Workflow Templates, Hierarchy Editor, Reporting, Harvester Profiles, Remote Repositories, Courses, User Management, and Security Manager. At the bottom left is a red 'Exit Console' button.

**Figure 2 Administration console**

## Administration Console tools

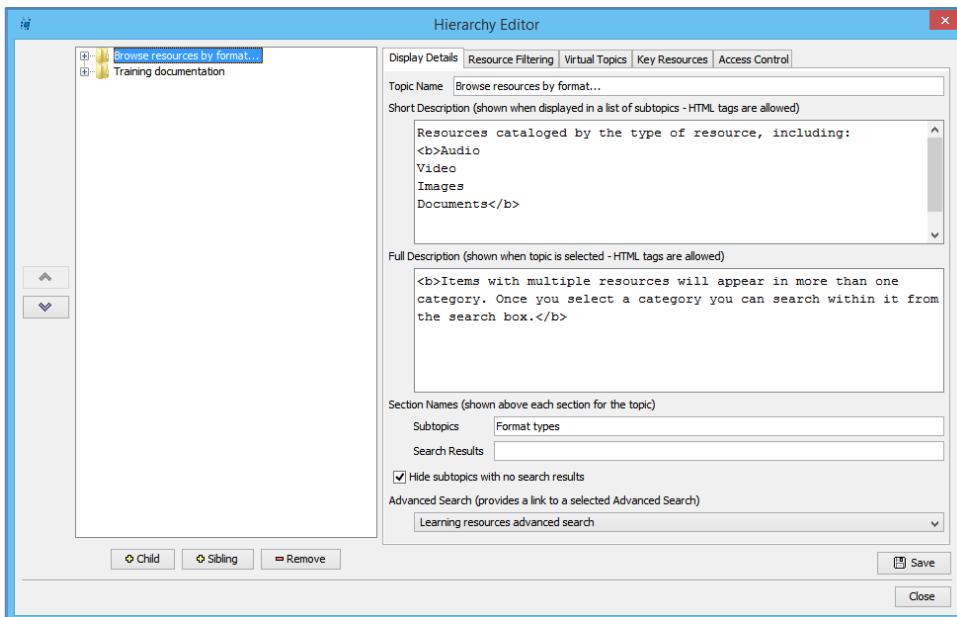
Each Administration Console tool provides an interface to edit or configure a series of EQUELLA properties. The following is an overview of the Administration Console tools:

- **Metadata Schemas**—enables the creation of schemas that are used to hold the metadata for collections. One schema can be used in multiple collections. Further information is provided in the *EQUELLA Metadata Schema Configuration Guide*.
- **Collection Definitions**—the type of resources stored in the EQUELLA Digital Repository. A collection represents a unique container to store resources within EQUELLA and provides information about the resource, assisting in activities such as searching, storage, collaboration and contribution. Further information is provided in the *EQUELLA Collection Definitions Configuration Guide*.
- **Advanced Searches**—creates custom searches by searching specified metadata nodes and collections. Further information is provided in the *EQUELLA Advanced Search Configuration Guide*.
- **Taxonomies**—enables the creation and use of large taxonomies for improved resource classification. Further information is provided in the *EQUELLA Taxonomies Guide*.
- **Dynamic Collections**—the EQUELLA implementation of OAI Sets based on collection resources from one or more collections. Further information is provided in the *EQUELLA Dynamic Collections Guide*.
- **Workflow Templates**—allows content moderation and quality assurance processes to be customised and automated for each associated collection. Further information is provided in the *EQUELLA Workflow Configuration Guide*.
- **Hierarchy Editor**—configures the display of resources in hierarchies to make them more discoverable to users. Further information is provided in the *EQUELLA Hierarchy Configuration Guide*.
- **Reporting**—manages EQUELLA Digital Repository report availability, import and export. Further information is provided in the *EQUELLA Reporting Guide*.
- **Harvester Profiles**—manages the configuration of Harvesters for harvesting of resources into selected collections. Further information is provided in the *EQUELLA Harvesting Configuration Guide*.
- **Remote Repositories**—configures external repositories which allow users to search for external resources and import results directly into a contribution wizard. Further information is provided in the *EQUELLA Remote Repositories Configuration Guide*.
- **Courses**—configures a list of courses for use with a copyright or integrated third-party system. Further information is provided in the [Courses](#) section on page 11.
- **User Management**—configures the plug-ins for user management in EQUELLA. Further information is provided in the *EQUELLA User Management Configuration Guide*.
- **Security Manager**—manages the privileges associated with users and groups allowing fine-grained control of user privileges for all areas of EQUELLA. Further information is provided in the *EQUELLA Security Administration Guide*.

## Opening the Administration console tools

The administration console tools behave in different ways when selected:

- **Hierarchy Editor** and **Security Manager** display an editor. An example of the Hierarchy editor is shown in Figure 3.



**Figure 3 Hierarchy Editor**

- **User Management** displays a list that appears as a pane on the right-hand side of the page and a **Configure** button. An example is shown in Figure 4.

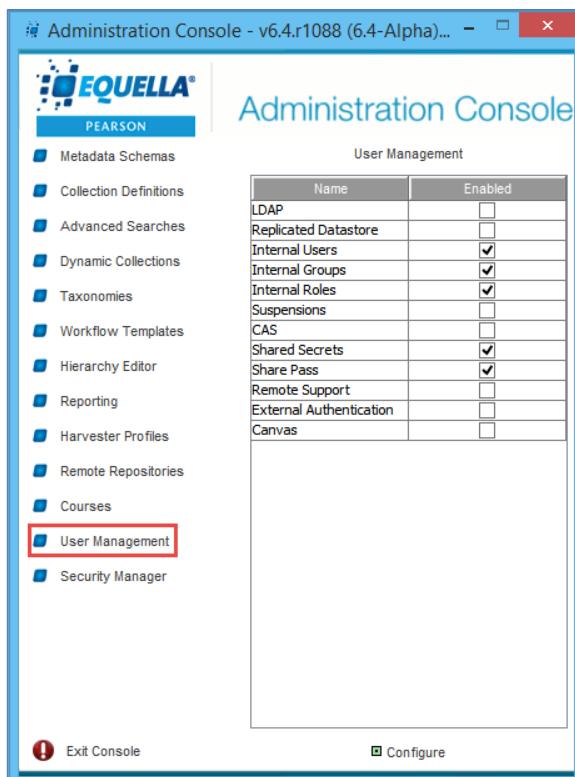


Figure 4 Administration Console—User Management

- **Metadata Schemas, Collection Definitions, Advanced Searches, Taxonomies, Dynamic Collections, Harvester Profiles, Workflow Templates, Reporting, Remote Repositories or Courses** enables:
  - A list that appears as a pane on the right-hand side of the page. An example of Courses is shown in Figure 5.
  - The **Add, Edit, Remove, Clone, Import** and **Export** buttons. The **Courses** tool also has **Bulk, Archive** and **Unarchive** buttons (providing the correct privileges have been granted) Refer to the *EQUELLA Security Administration Guide* for further information regarding privileges.

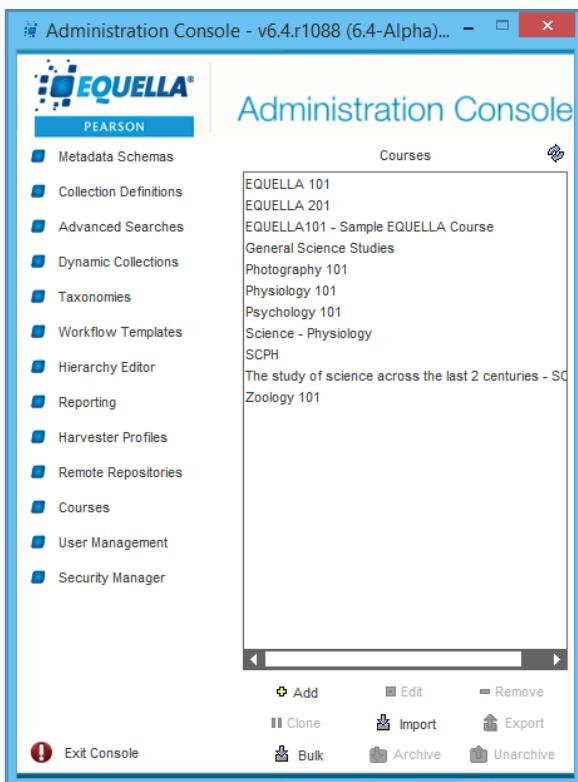


Figure 5 Administration Console—Courses pane

## Administration Console buttons

The following action buttons can be displayed:

### Add

Click **Add** to display an editor and create a new object for the EQUELLA instance.

### Edit

Select an object and click **Edit** (or double-click the object) to open the editor and make changes.

If the selection is being edited by another user a **Locked** dialog displays, as shown in Figure 6, providing the following options:

- —disables the **Save** button so that no changes can be made.
- —unlocks the entity from the previous owner. Editing can occur but changes can be lost from one or other user.
- —the selected editor is not opened.

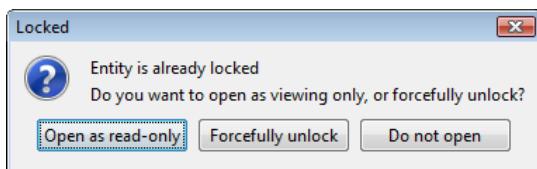


Figure 6 Locked entity dialog

## Remove

Click to delete the selection. Click to confirm and display a confirmation dialog then click to close the dialog.

## Clone

Click to copy an existing selection. Click to confirm and display a confirmation dialog then click to close the dialog. The cloned instance can then be modified by selecting it and clicking .

## Import

Click to import a selection that has previously been exported from the Administration Console. A warning dialog displays as shown in Figure 7.

(*NOTE: Only import ZIP files that have been exported from the Administration Console with the current version of EQUELLA—other ZIP files can adversely affect the stability of the system.*)

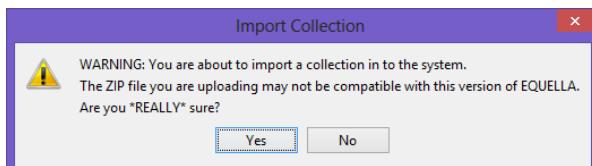


Figure 7 Import Schema warning dialog

## Export

Click to export the selection as a ZIP file. Select a location and File name then click . An Export Security dialog displays, as shown in Figure 8.



Figure 8 Export Security dialog

Click or to export the security rules and display a confirmation dialog. Click to close the dialog.

## Bulk

Click  **Bulk** to import multiple courses as a CSV file. Click  or  to display a confirmation dialog then click  to close the dialog. See [To import multiple courses](#) on page 11 for more information.

## Archive

Click  **Archive** to store selected courses for future use. This toggles the Archived property of the course. Click  to confirm and display a confirmation dialog then click  to close the dialog. See [To archive courses](#) on page 12 for more information.

## Unarchive

Click  **Unarchive** to reinstate a previously archived course. This toggles the Archived property of the course. Click  to confirm and display a confirmation dialog then click  to close the dialog. See [To unarchive courses](#) on page 12 for more information.

## Configure

Click  **Configure** to display the selected plug-in's dialog.

## Courses

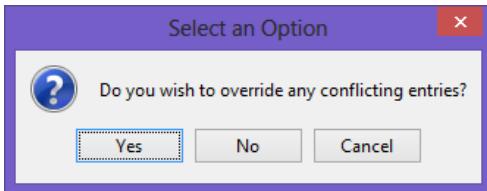
Courses in EQUELLA are used for copyright license activation and for third-party integrations such as Blackboard™ or Moodle™. Courses can be archived for future use or multiple courses can be imported with a bulk upload.

### To access an EQUELLA course

1. Select **Courses** from the Administration **Console** to display a list of courses. An example is shown in Figure 5.

### To import multiple courses

1. Click  **Bulk** to display a **Select an Option** dialog, as shown in Figure 9.



**Figure 9 Select an Option dialog**

2. Choose  to overwrite any conflicting entries with new entries that have the same name, or  to leave the original entries.
3. Choose  or  to display a Bulk Import... dialog.
4. Select the relevant CSV file from the local computer or network then click  to display a confirmation dialog. Click  to display the courses in the Courses pane. (*NOTE: Archived courses can be included by using an Archived column with true or false values.*)

## To archive courses

Select the courses to store for future use.

1. Click  [Archive](#) to display an Archive dialog.
2. Click  [Yes](#) to confirm and display a confirmation dialog then click  [OK](#) to close the dialog.

## To unarchive courses

Select the archived courses to restore.

1. Click  [Unarchive](#) to display an Unarchive dialog.
2. Click  [Yes](#) to confirm and display a confirmation dialog then click  [OK](#) to close the dialog.

## To add a new course

1. Click  [Add](#) to display the **Course Editor**.

## To edit a course

Select a course (e.g. *EQUELLA101*).

1. Click  [Edit](#) to display the Course **Editor**.

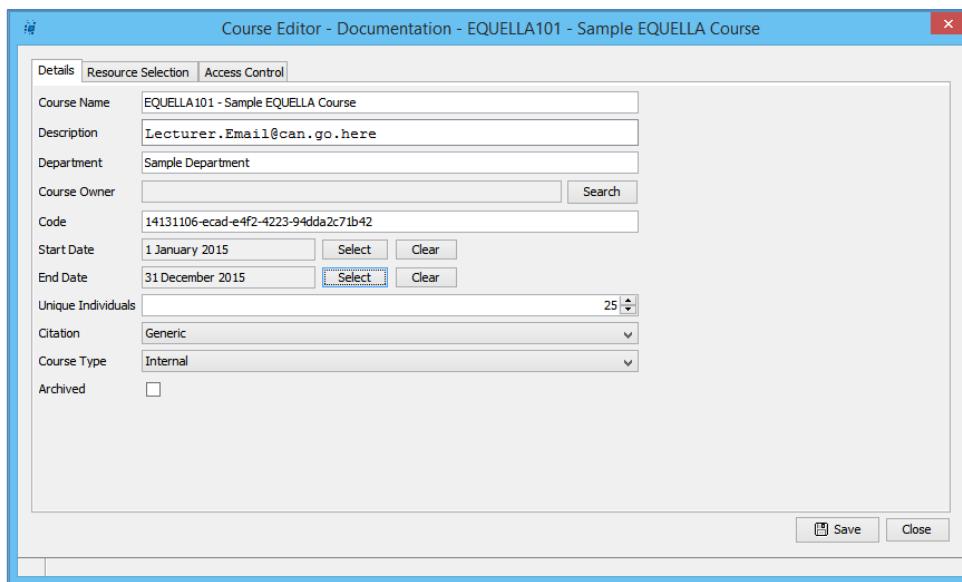
## The Course Editor

The **Course Editor** provides an interface for course configuration with the following tabs:

- **Details**—includes general information for a course.
- **Resource Selection**—provides choices for viewing resources.
- **Access Control**—controls access to a course.

## Details tab

The **Details** page provides general information and configurable elements for a course. An example is shown in Figure 10.



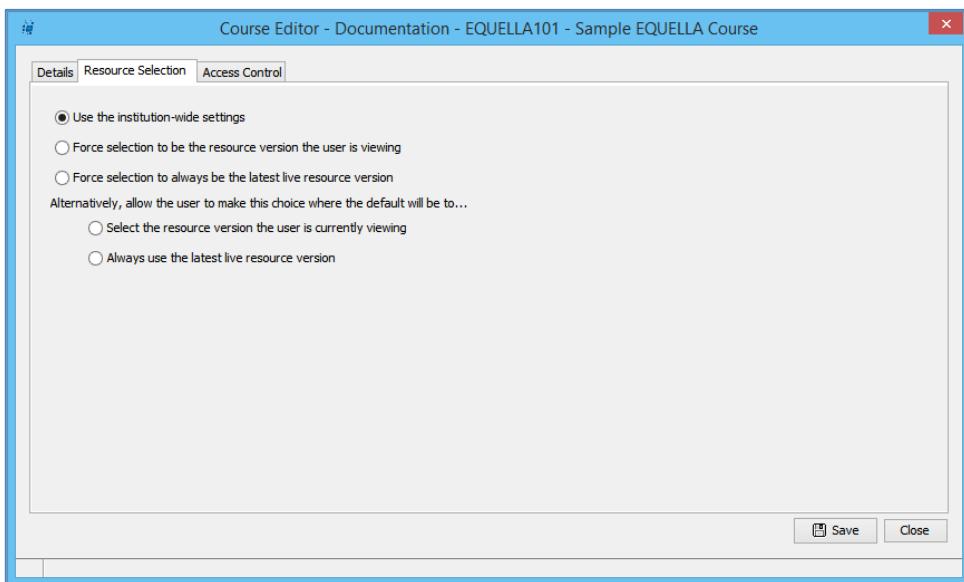
**Figure 10 Course Editor—Details page**

The Details page elements include:

- **Course Name**—enter an appropriate course name (e.g. *EQUELLA 101*). This name is displayed to users when activating and managing copyright resources.
- **Description**—enter an appropriate course description. This description is displayed on the resource's Copyright tab when a resource is activated. An email address or URL can be entered and are displayed as a clickable link.
- **Department**—enter the name of the department responsible for material (e.g. *Sample Department*).
- **Course Owner**—defaults to the course creator. Clicking  displays the **Select Recipients...** dialog where a new owner can be selected.
- **Code**—enter an ID for linking the course to third-party integrations such as Blackboard™ or Moodle™. (*NOTE: The EQUELLA course code should be exactly the same as the course code used in the integrated system.*)
- **Start Date**—selecting the course start date is optional. If this field is blank the course start date is determined by the System Settings Course Defaults. Further information is provided in the EQUELLA System Settings Configuration Guide.
- **End Date**—selecting the course end date is optional. If this field is blank the course end date is determined by the System Settings Course Defaults.
- **Unique Individuals**—enter the number of participants for the course (e.g. 25).
- **Citation**—select a style from the drop-down list (e.g. *Generic*) to be used when citing licensed material (optional). The citation styles are configured during metadata schema creation. Further information is provided in the EQUELLA Metadata Schema Configuration Guide.
- **Course Type**—select an appropriate course type from the drop-down list (e.g. *Internal*). This is used in CAL reporting.
- **Archived**—check to prevent a course from displaying to users when activating and managing copyright items.

## Resource selection tab

The **Resource Selection** page provides institution-wide and course-specific settings for resource version selection. Resource selection configuration is used to determine which version of a resource is displayed when a resource is selected. These settings are applicable to resources selected and saved when EQUELLA is integrated with a third party application such as Blackboard™ or Moodle™. Figure 11 shows a Resource Selection page.



**Figure 11 Course Editor—Resource Selection page**

The Resource Selection configurable options include:

- **Use the institution wide settings** (default option)—select to apply the configured settings from the System Settings Version Selection plug-in.
- **Force selection to be the resource version the user is viewing**—select to display the saved version of a resource.
- **Force selection to always be the latest live resource version**—select to display the most recent live version of a resource even if the saved resource is for an older version.
- **Select the resource version the user is currently viewing**—select to allow the user to choose between the saved resource version and most recent live version. This option defaults to the saved resource version.
- **Always use the latest live resource version**—select to allow the user to choose between the saved resource version and most recent version. This option defaults to the most recent resource version.

## Access control tab

The **Access Control** page allows configuration of security properties associated with the selected course.

The three privileges for courses are:

- CREATE\_COURSE\_INFO = create a course
- DELETE\_COURSE\_INFO = delete this course
- EDIT\_COURSE\_INFO = edit this course.

These privileges are typically granted to Administrators.

If *delete* or *edit* privileges are not specified on the Access Control page of the Course Editor, users and collaborators associated with this particular course will inherit the privileges that are set at the Courses level in the Administration Console Security Manager. Further information is provided in the *EQUELLA Security Administration Guide*.

### To save the course settings

1. Click  Save to save the configuration details.
2. Click  Close to close the Course Editor.

### To log out of the Administration Console

1. Click  Exit Console.

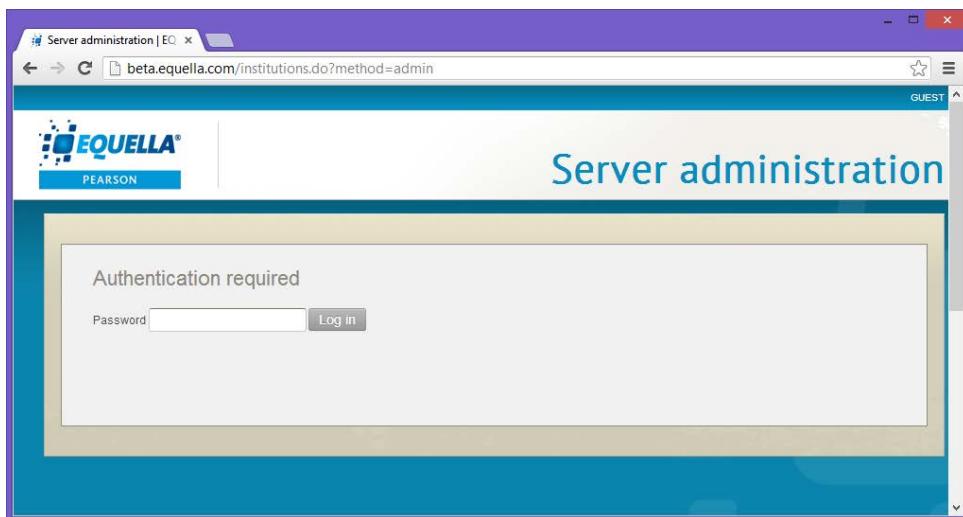
## Institution Manager

The **Institution Manager** allows hosting of EQUELLA institutions. Each institution can share the same database and parent filestore while being entirely independent of any other institution. Multiple databases can be installed so each institution can be associated with its own database. (See the *EQUELLA Installation and Administration Guide* for more information.)

Institutions are created by cloning an existing server institution or importing an institution. Both processes create independent copies of the parent institution although initially the institutions may appear identical to the parent. Institutions can also be edited, exported, deleted or disabled.

### To access the Institution Manager

1. Open a browser and enter the EQUELLA address of the hosting server with '/institutions.do?method=admin' appended to the URL. (e.g. 'http://equella.myinstitution.edu/logon.do' would become 'http://equella.myinstitute.edu/institutions.do?method=admin') to display the **Server administration Authentication page**, shown in Figure 12.



**Figure 12 Login to the EQUELLA Institution Manager**

2. Enter the Password used by the EQUELLA server administrator. (This is set on the Server Settings page after installation. Refer to the *EQUELLA Installation and Administration Guide* for more information.) Then click **Log in**. The **Institution Manager** page displays. An example is shown in Figure 13.

Institution	Status	Actions
APAC Webinar 2015	Enabled	Login   Disable   Edit   Delete   Clone   Export
Canvas1	Enabled	Login   Disable   Edit   Delete   Clone   Export
Canvas2	Enabled	Login   Disable   Edit   Delete   Clone   Export
Canvas3	Enabled	Login   Disable   Edit   Delete   Clone   Export
CathDemo	Enabled	Login   Disable   Edit   Delete   Clone   Export

**Figure 13 Institutions page**

Further information on the Institution Manager is provided in the *EQUELLA Installation and Administration Guide*.

# Settings

The EQUELLA **Settings** page allows suitably privileged users to setup, configure and edit a number of EQUELLA administration functions that affect the way EQUELLA behaves. It also has a link to the *Administration console*.

## To access Settings

1. Open a browser and enter your EQUELLA URL (e.g. `http://equella.myequellainstitution.edu`).
2. Log in to EQUELLA as an administrator then select **Settings** from the navigation menu. The **Setting** page displays. An example is show in Figure 14.

The screenshot shows the EQUELLA administration interface. The left sidebar contains a navigation menu with various links such as Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format, Training documentation, Google search, Manage tasks, Manage external resources, Manage resources, Manage activations, Reports, and Settings. The 'Settings' link is highlighted with a red box and a circled '1'. The main content area is titled 'Settings' and displays a table of settings categories. The table has two columns: 'Setting categories' and a detailed description. A red box highlights the second column with a circled '2'. The categories listed are: Active caching, Administration console, Approvals and payments, Content restrictions and quotas, Course defaults, Custom links, Dashboard, Diagnostics, Display date format, Echo360 EchoSystem servers, External system connectors, External tool providers (LTI), Google Analytics, Google API, Harvester, HTML editor, Kaltura, Languages, Logged in users, Login, LTI consumers, Mail, Manual data fixes, MIME types, OAI identifier, OAuth, Scheduled tasks, Searching and content indexing, Selection sessions, Shortcut URLs, Store front setup, Store setup, Themes, and User scripts.

Setting categories	Description
Active caching	Configure active caching options to improve repository access for low bandwidth users
Administration console	Launch the administration console for advanced configuration of EQUELLA users and content
Approvals and payments	Configure order approval and payment rules
Content restrictions and quotas	Select common virus carrying file types to be prohibited for uploading to the EQUELLA repository. Also configures the amount of storage available to EQUELLA users
Course defaults	Set default course start and end dates
Custom links	Configure custom links that can display on the navigation menu
Dashboard	Manage Dashboard portlets
Diagnostics	View a user's groups and group membership information
Display date format	Configure the system display date format
Echo360 EchoSystem servers	Configure EchoSystem server details for seamless authentication.
External system connectors	Configure external system connectors to enable content to be published directly to an LMS
External tool providers (LTI)	Configure default settings for LTI providers
Google Analytics	Configure Google Analytics to monitor and analyse website traffic
Google API	Configure a Google API key
Harvester	Configure harvesters to skip DRM acceptances when harvesting items
HTML editor	Administer third party HTML editor plugins and manage the HTML editor toolbar and styles.
Kaltura	Configure Kaltura streaming media servers
Languages	Import language packs and select contribution languages
Logged in users	Display a list of all logged in users
Login	Configure login settings and authentication by IP address. Author a Login notice to display to users on login
LTI consumers	Create and maintain LTI consumer client registrations
Mail	Configure the EQUELLA mail server
Manual data fixes	Run manual data fixes for data correction (under Support guidance)
MIME types	Display a list of MIME types, where the properties can be edited, including viewer defaults
OAI identifier	Configure OAI identifier attributes, ensuring that OAI items can be uniquely identified
OAuth	Create and maintain OAuth clients and view generated tokens
Scheduled tasks	Configure the times for scheduled and manual tasks to be run
Searching and content indexing	Configure options for searching and content indexing
Selection sessions	Configure Quick Contribute control for EQUELLA Select page, and configure version control options
Shortcut URLs	Associate a text alias with a URL to create a shortcut
Store front setup	Configure store front settings.
Store setup	Enable store functionality and set up store details
Themes	Upload a new theme file to change the EQUELLA look and feel
User scripts	Create or edit scripts for use in other areas of EQUELLA

**Figure 14 Settings page**

Enter the start of a search term in the **Enter text to filter table rows** edit box to show only Settings categories that contain the entered search term in the title or description.

(*NOTE: This edit box only displays if there are 10 or more Settings categories displayed*).

The **Settings categories** displayed depend on the privileges granted to the user, and can include:

- **Active caching**—configures caching schedules. See the [Active caching](#) section on page 20 for more information.
- **Administration console**—click the link to open the Administration console. See [Administration Console](#) on page 4 for more information.
- **Approvals and payments** – used with the EQUELLA Content Exchange – Store front functionality. See *EQUELLA Store Front User Guide* for further information.
- **Content restrictions and quotas**—manages the common virus-carrying files types banned from the repository and user upload limits. See the [Content restrictions and quotas](#) section on page 24 for more information.
- **Course defaults**—configures default start and end dates for courses. See the [Course defaults](#) section on page 27 for more information.
- **Custom links**—allows the setup of external links to be accessed from the EQUELLA system. See the [Custom links](#) section on page 28 for more information.
- **Dashboard**—enables the management and configuration of user Dashboard portlets. See the [Dashboard](#) section on page 30 for more information.
- **Diagnostics** – gives access to basic tools including finding groups for a user and users for a group. See the [Diagnostics](#) section on page 40 for further information.
- **Display date format** – enables administration users to configure the default system display date format. See the [Display date format](#) section on page 42 for more information.
- **Echo360 EchoSystem servers** – configures EchoSystem servers for Echo360 integrations. See the *EQUELLA Echo360 Integration Guide* for more information.
- **External system connectors**—enables the creation and management of connectors for Push to LMS functionality. See the *EQUELLA Push to LMS User Guide* for more information.
- **External tool providers (LTI)** – configures external LTI tool providers. See the *EQUELLA LTI User Guide* for further information.
- **Google analytics**—provides a link to the Google Analytics function. See the [Google Analytics™ configuration](#) section on page 43 for more information.
- **Google API** – configures the Google API used for YouTube videos. See the [Google API](#) section on page 48.
- **Harvester**—configures the DRM acceptance setting for harvesters. See the [Harvester](#) section on page 48 for more information.
- **HTML editor** – provides the ability for users to customise the HTML Editor, including advanced customisations, adding and editing styles, customising the toolbar and uploading third-party plug-ins. See the *EQUELLA HTML Editor User Guide* for more information.

- **Kaltura**—configures the Kaltura server settings. See the [Kaltura](#) section on page 49 for more information.
- **Languages**—configures the languages used by EQUELLA. See the [Languages](#) section on page 52 for more information.
- **Logged in users**—allows the user to view a list of all logged in users. See the [Logged in users](#) section on page 54 for more information.
- **Login**—configures logins and authentication options. See the [Login](#) section on page 55 for more information.
- **LTI consumers** – enables the creation and maintenance of LTI consumers. Additionally, users can map LTI roles to EQUELLA roles. See the *LTI Consumer Configuration Guide* for further information.
- **Mail**—enables the configuration of email settings. See the [Mail](#) section on page 60 for more information.
- **Manual data fixes**—provides access to data fix applications that may need to be run under instruction from EQUELLA support. See the [Manual data fixes](#) section on page 60 for more information.
- **MIME types**—enables the adding, editing or deleting of MIME types within the EQUELLA system to control the way different file types are displayed. See the [MIME types](#) section on page 61 for more information.
- **OAI identifier**—enables the editing of identifier attributes. See the [OAI identifier](#) section on page 67 for more information.
- **OAuth**—configures OAuth client applications and lists associated tokens. See the *EQUELLA REST API Guide* for more information.
- **Scheduled tasks**—configures the times scheduled tasks should be executed. See the [Scheduled tasks](#) section on page 68 for more information.
- **Searching and content indexing**—enables the configuration of options for searching, filtering and sorting as well as content indexing. See the [Searching and content indexing](#) on page 69 for more information.
- **Selection sessions**—configures the Quick Contribute control in integrated third-party systems and the document version defaults. See the [Selection sessions](#) section on page 75 for more information.
- **Shortcut URLs**—enables the creation of URL shortcuts. See the [Shortcut URLs](#) section on page 80 for more information.
- **Store front setup** - used with the EQUELLA Content Exchange – Store front functionality. See *EQUELLA Store Front User Guide* for further information.
- **Themes**—enables the uploading of theme files to change the EQUELLA ‘look and feel’. See the *EQUELLA Theming Guide* for more information.
- **User scripts** – allows users to create and save JavaScript and FreeMarker scripts for use in the system. See the [User scripts](#) section on page 81 for further information.

## Active caching

Active caching is used to improve repository access for low bandwidth users. Active caching allows a cache server to download repository resources from the central server

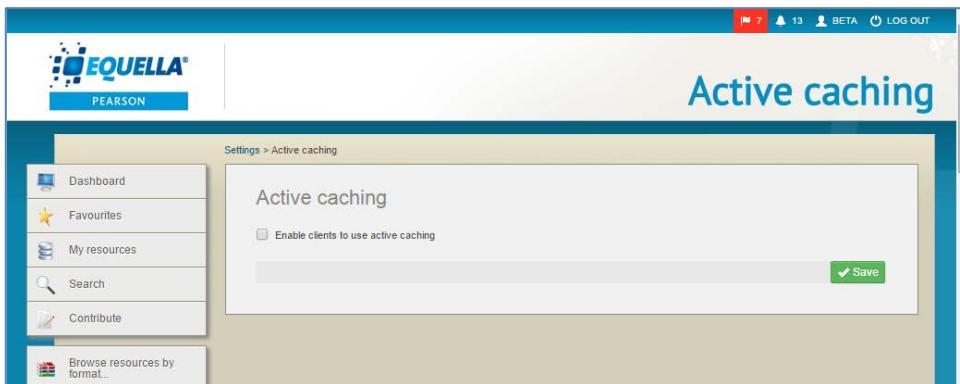
during low usage times so local users can have improved responsiveness when using and viewing the cached items.

A cache configuration requires the following to be configured:

- Enable and configure remote caching on the central server (covered in the following section). Convert local times to GMT.
- Create client remote cache users on the central server. Further information on user creation is provided in the *EQUELLA User Management Configuration Guide*.
- Configure each client remote cache server. Further information on configuring a caching proxy server is provided in the *EQUELLA Installation and Administration Guide*.

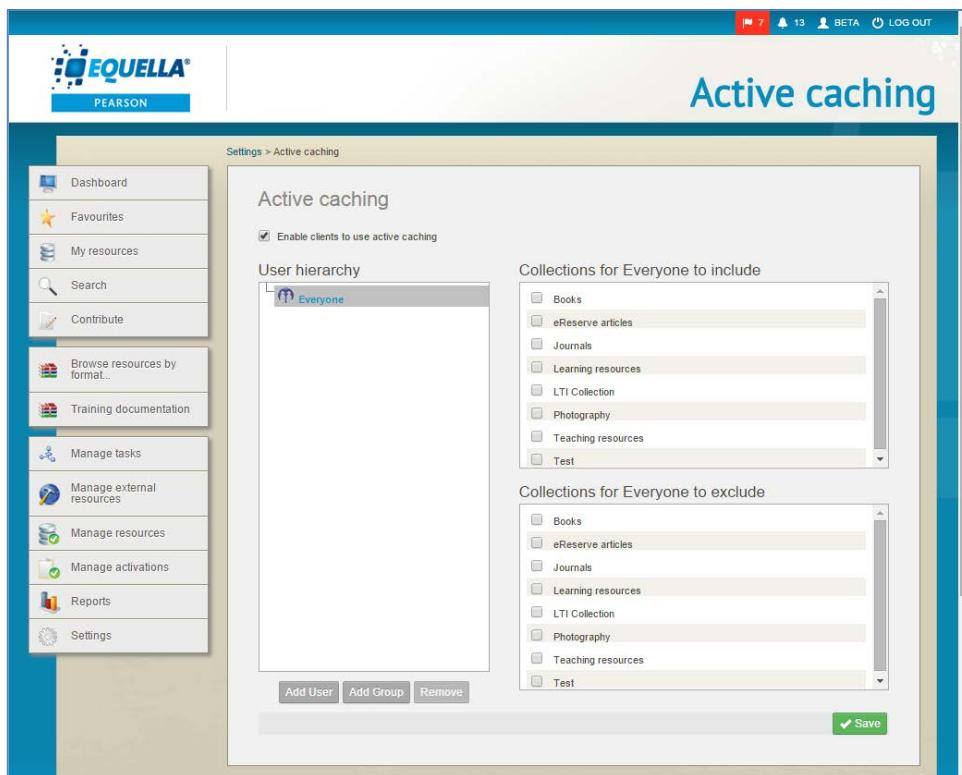
## To configure Active caching

1. Select the **Active caching** link from the Settings page. The **Active caching** page displays, as shown in Figure 15.



**Figure 15** Active caching page

2. Select the **Enable clients to use active caching** checkbox. Further elements display on the Active caching page, as shown in Figure 16.



**Figure 16 Active caching page with active caching enabled**

The Active caching page now has three sections:

- **User hierarchy**—used to add User hierarchy groups (unrelated to User Management groups) and users.
- **Collections for (x) to include**—select the required collections to be cached to the selected users.
- **Collections for (x) to exclude**—select the required collections to be excluded from caching for the selected users.

### To add a group

1. Highlight the required parent node (in this case '*Everyone*') then click **Add Group** to display the **Create a grouping** dialog, as shown in Figure 17.



**Figure 17 Create a grouping dialog**

2. Enter a name (e.g. *Education cache*) then click **OK**. The new group appears as a child of the selected parent node.
3. Click **Save**.

## To add a user

1. Highlight the required parent node (in this case '*Education cache*') then click **Add User** to display the **Select user(s)** dialog. An example is shown in Figure 18.



**Figure 18 Select user(s) dialog**

2. Select the required users then click **✓ Select these users** to add them to the selected parent node as child nodes. An example is shown in Figure 19.



**Figure 19 Users added to Education group**

3. Click **✓ Save**.

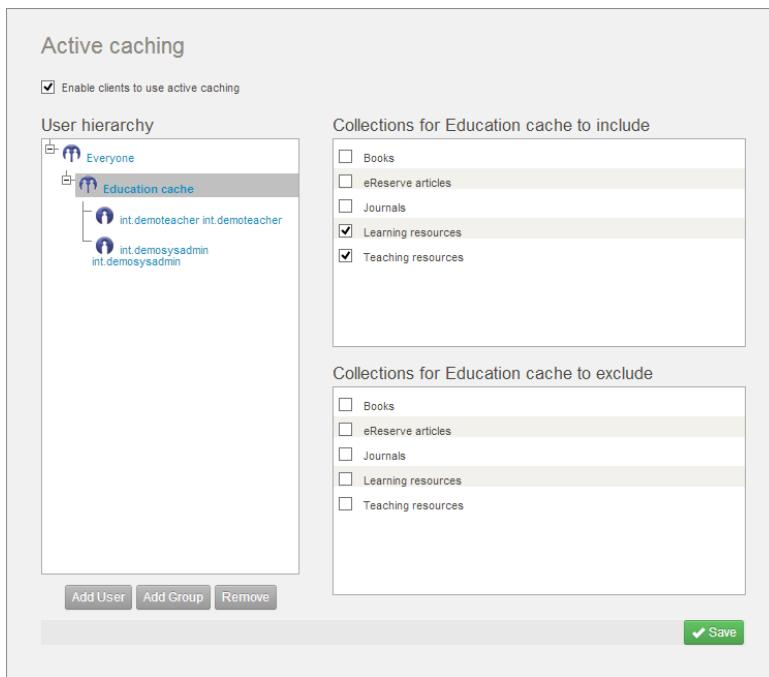
## To remove a user or group

1. Highlight the required user or group then click **Remove**.

2. Click .

To configure the collections the cache server user to group can access

Highlight the required group or user then select the required collections in the **Collections for (x) to include**. An example is shown in Figure 20.



**Figure 20 Collection selection**

(NOTE: Selected included and excluded collections are inherited by child nodes.)

3. Click .

To exclude collections from a group or user

1. Highlight the required group or user then select the required collections in the **Collections for (x) to exclude**.

(NOTE: Selected included and excluded collections are inherited by child nodes.)

2. Click .

## Content restrictions and quotas

The Content restrictions and quotas page has two sections:

- **Banned file extensions**—useful for prohibiting specific file types that are common virus carriers from being uploaded to the repository. Users are prevented from uploading file types listed in the Banned file extensions list.
- **User content quotas**—configures the amount of storage available to EQUELLA users. The default value is to allow all users unlimited storage. Users with quotas will have all uploads monitored to ensure the quota is not exceeded. Any attempt to exceed the quota will cause the upload to fail. When a user is listed in more than one quotas group they will be allocated the larger amount.

## Configure Content restrictions and quotas

1. Click the **Content restrictions and quotas** link from the Settings page. The **Content restrictions and quotas** page displays, as shown in Figure 21.

The screenshot shows the 'Content restrictions and quotas' page in EQUILLA. On the left, there's a sidebar with various navigation links like Dashboard, Favourites, My resources, Search, Contribute, etc. The main content area has two sections: 'Banned file extensions' and 'User content quotas'. Under 'Banned file extensions', there's a list of extensions: BAT, COM, EXE, SCR, SHS, and VBS. Each entry has a delete icon (an 'X') to its right. Below this list is a link to 'Add banned extension'. Under 'User content quotas', there's a table with one row: 'Size' (250 MB) and 'Expression' (INT - Content Administrators AND Science Dept Payers). There are 'Edit' and 'Delete' links next to the expression, and a 'Add user content quota' link below the table.

Figure 21 Content restrictions and quotas page

### To add a Banned file extension

1. Click the **Add banned extension** link to display the **Enter banned extension** dialog. An example is shown in Figure 22.



Figure 22 Add banned extension dialog

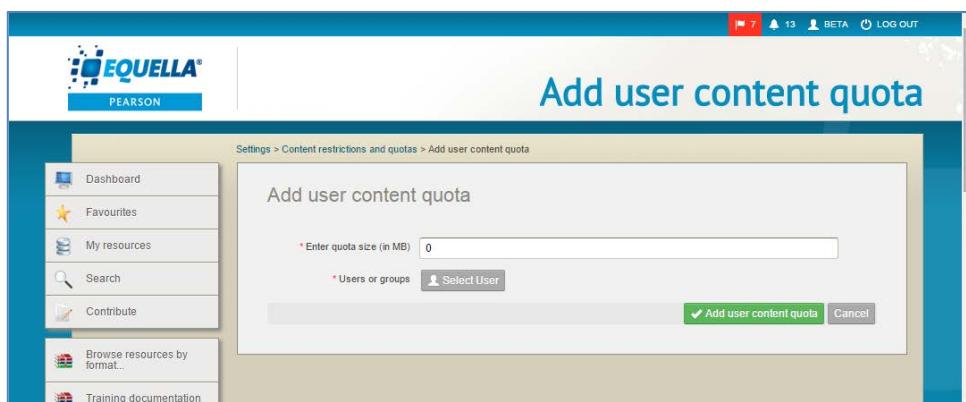
2. Enter the **File extension** to be banned, then click **OK**. The file extension now displays in the Banned file extension list. Click the **Add banned extension** link to add further file extensions.

### To remove a Banned file extension

1. Click **X** beside the required Banned file extension.

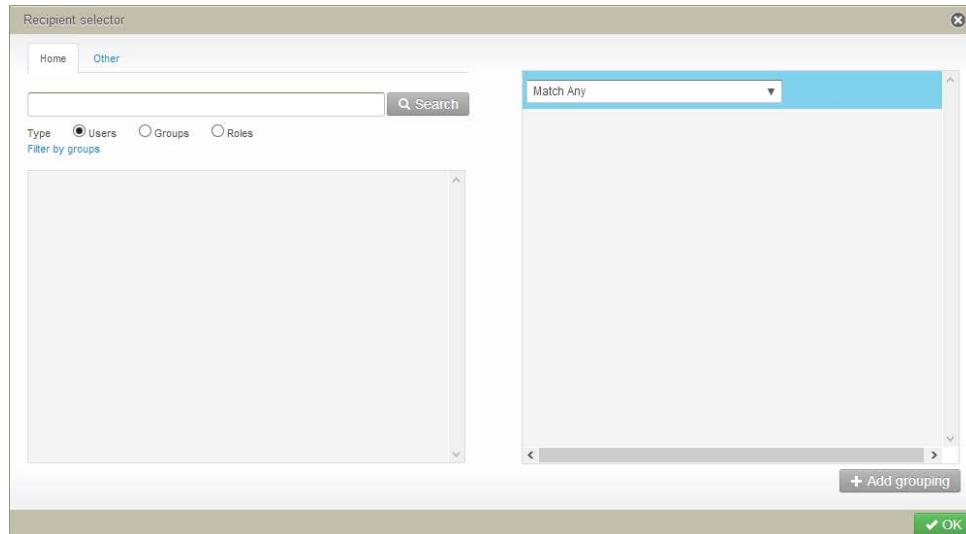
### To configure User content quotas

1. Click the **Add user content quota** link to open the **Add user content quota** page. An example is shown in Figure 23.



**Figure 23 Add user content quota page**

2. Enter quota size (in MB).
3. Click **Select User**. The **Recipient selector** dialog displays. An example is shown in Figure 24.



**Figure 24 Recipient selector dialog**

4. Select the required Users, Groups and/or Roles to which the entered quota is to be applied then click **OK**. See [Recipient selector](#) on page 84 for more information.
5. Click **Add user content quota**. The new Content quota now displays in the User content quotas list. An example is shown in Figure 25.

User content quotas	
Size	Expression
500 MB	INT - Students
<a href="#">Edit   Delete   ▲▼</a>	
<a href="#">Add user content quota</a>	

**Figure 25 User content quotas list**

6. Click the **Add user content quota** link to add further user content quotas.

### To edit a User content quota

1. Click the **Edit** link beside the required User content quota to open the **Edit user content quota details** page.
2. Make the required changes, then click **✓ Add user content quota**.

### To remove a User content quota

1. Click the Delete link beside the required User content quota.

### To reorganise the User content quota list

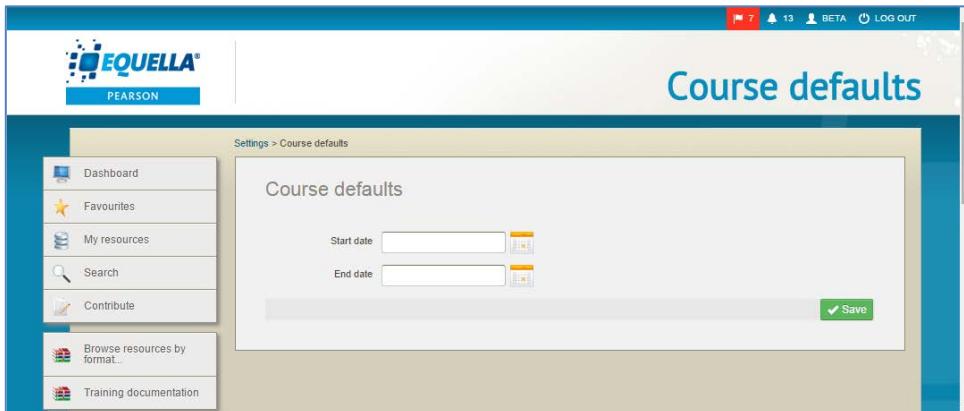
1. Use the button to move the selected User content quota up one place in the list, or use the button to move the selected User content quota down one place in the list.

## Course defaults

The Course Defaults page configures start and end dates for copyright activation. These values are used as default values for all course activations and can be changed when a course is being configured.

### To configure the course start and end dates

1. Select the **Course Defaults** link from the Settings page. The **Course defaults** page displays, as shown in Figure 26.



**Figure 26 Course defaults page**

2. Click next to the **Start date** to display a calendar. An example is shown in Figure 27.



**Figure 27 Select the default date calendar page**

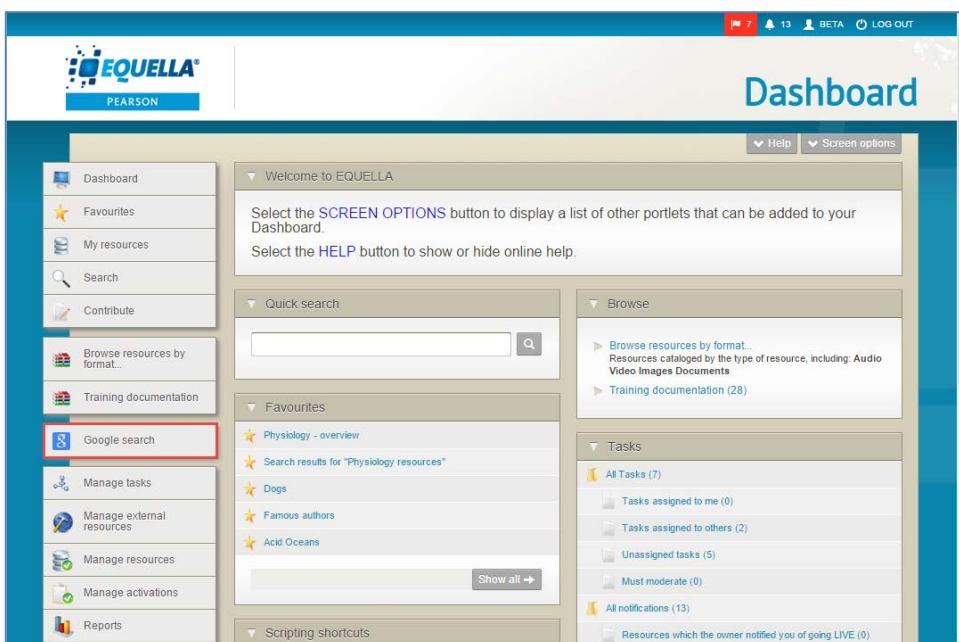
3. Select the month from the month drop-down list.
4. Select the year from the year drop down list.
5. Click the required day on the calendar.
6. Repeat for the **End date**.
7. Click **Save**.

To clear either a start or end date

1. Click the **Clear** link to remove the current dates.

## Custom links

The Custom links function enables administrators to configure, reorder, assign viewing rights and attach an icon to external web page links, which are displayed on the navigation menu. An example is shown in Figure 28.



**Figure 28 Custom link displayed on navigation menu**

## To add a custom link

1. Select the **Custom links** link from the Settings page. The **Custom links** page displays. An example is shown in Figure 29.

The screenshot shows the EQUELLA interface with the 'Custom links' page open. The left sidebar includes links like Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format, and Training documentation. The main content area is titled 'Custom links' and shows a section for 'Existing links'. It contains one entry: 'Google search - http://google.com' with an icon, followed by 'Edit' and 'Delete' buttons, and a '+ Add' button.

**Figure 29 Existing links page**

Existing links can be edited by clicking or deleted by clicking .

2. Click . The **Create link** page displays. An example is shown in Figure 30.

The screenshot shows the 'Create link' page within the EQUELLA interface. The left sidebar is identical to Figure 29. The main form is titled 'Create a new link' and contains fields for 'Display text' (set to 'Google search'), 'URL' (set to 'http://google.com'), and 'Open in a new window' (checkbox checked). There's also a 'Select Users...' button and a note about who can view the link. Below these are sections for 'Upload an icon' (with a 'Browse' button) and 'Download remote icon' (with a 'Download' button). At the bottom are 'Save' and 'Cancel' buttons, with a note that asterisks indicate mandatory fields.

**Figure 30 Create link page**

3. Enter the **Display text** to show as the menu item (e.g. *Google search*).
4. Enter the **URL** of the required web page (e.g. *http://google.com*).
5. Select **Open in a new window** to open the page in separate window, or leave unchecked to open in the EQUELLA window.

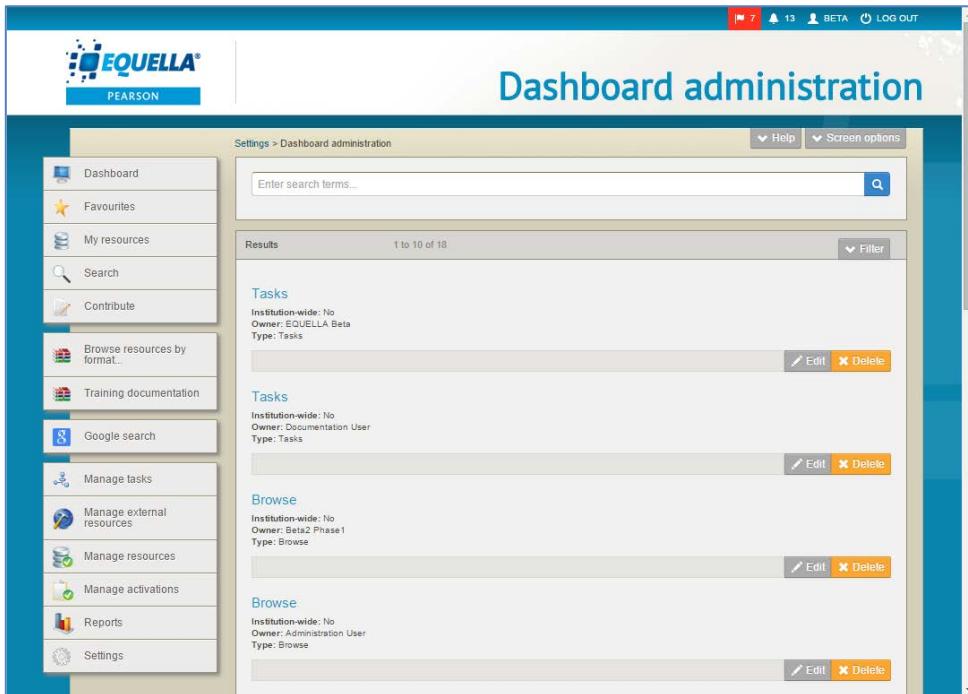
6. Click  **Select User** to open the **Select recipients** dialog, and select the required users. (See [Recipient selector](#) on page 84 for more information.)
7. If required, click  **Browse** to open a stored icon file on the hard disk or network, then click  **Upload**. Alternatively, click  **Download** for the system to attempt to find the logo from the entered web page. The icon is displayed beside the link name, as shown in Figure 28.
8. Click  **Save**.

## Dashboard

The Dashboard function enables administrators to create, disable and delete portlets that display on the EQUELLA Dashboard page.

### To configure portlets

1. Click the **Dashboard** link from the Settings page. The **Dashboard administration** page displays, as shown in Figure 31.



The screenshot shows the 'Dashboard administration' page within the EQUELLA interface. The left sidebar contains navigation links such as Dashboard, Favourites, My resources, Search, Contribute, and various management tasks like Browse resources by format, Training documentation, Google search, Manage tasks, Manage external resources, Manage resources, Manage activations, Reports, and Settings. The main content area is titled 'Dashboard administration' and shows a table of portlets. The table has columns for Title, Institution-wide, Owner, Type, Edit, and Delete. There are four entries:

Title	Institution-wide	Owner	Type	Edit	Delete
Tasks	No	EQUELLA Beta	Tasks		
Training documentation	No	Documentation User	Tasks		
Browse	No	Beta2 Phase1	Browse		

**Figure 31 Dashboard administration page**

The Dashboard administration results page displays a list of all portlets that have been created in the EQUELLA system. Each result displays the following elements:

- **Title**—the name of the portlet.
- **Institution-wide**—will display **Yes** if *Show for other users* is selected, or **No** if *Show for other users* is not selected.
- **Owner**—the user that created the portlet.

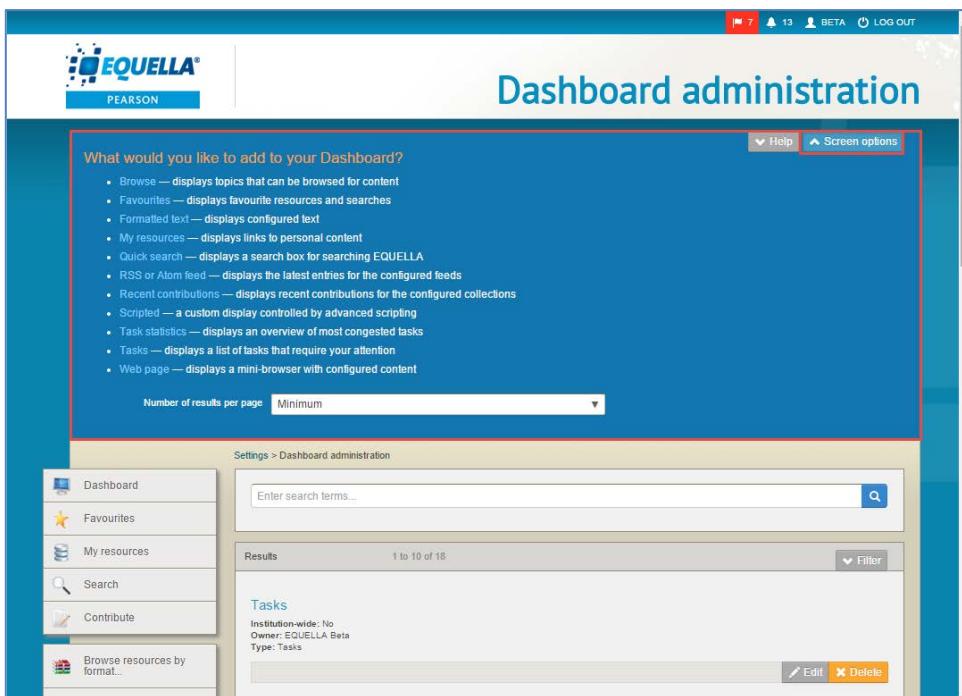
- **Type**—the type of portlet. Types can be *Browse*, *Favourites*, *Formatted text*, *My resources*, *Quick search*, *Recent contributions*, *RSS or Atom feed*, *Scripted*, *Tasks*, *Task statistics* and *Web page*.
-  **Edit**—click to open the relevant portlet editor page.
-  **Delete**—click to delete the portlet.

## Add portlets

Administrators can add portlets to users' Dashboard pages. Portlets can be configured to show for all users, a group of users or a single user. Other properties, such as the ability for users to minimise or close the portlets, can also be set.

### To add a portlet

1. Click  at the top right of the Dashboard administration page. The **What would you like to add to your Dashboard?** section displays, as shown in Figure 32.



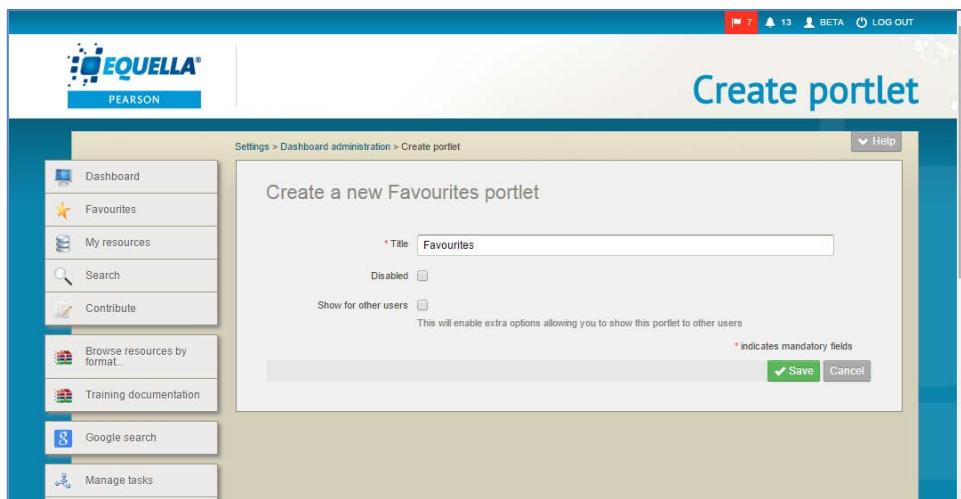
The screenshot shows the EQUELLA Dashboard administration interface. At the top, there's a navigation bar with icons for notifications (7), a user profile (13), and 'LOG OUT'. Below the navigation is a header 'Dashboard administration'. On the left, a sidebar menu includes 'Dashboard', 'Favourites', 'My resources', 'Search', 'Contribute', and 'Browse resources by format...'. The main content area has a red box highlighting the 'What would you like to add to your Dashboard?' section. This section contains a list of portlet types with descriptions:

- **Browse** — displays topics that can be browsed for content
- **Favourites** — displays favourite resources and searches
- **Formatted text** — displays configured text
- **My resources** — displays links to personal content
- **Quick search** — displays a search box for searching EQUELLA
- **RSS or Atom feed** — displays the latest entries for the configured feeds
- **Recent contributions** — displays recent contributions for the configured collections
- **Scripted** — a custom display controlled by advanced scripting
- **Task statistics** — displays an overview of most congested tasks
- **Tasks** — displays a list of tasks that require your attention
- **Web page** — displays a mini-browser with configured content

Below this list is a dropdown menu 'Number of results per page' set to 'Minimum'. At the bottom of the main content area, there's a 'Settings > Dashboard administration' sidebar with a search bar and a 'Results' table showing '1 to 10 of 18' items, with a 'Filter' button. The bottom right corner of the main content area has 'Edit' and 'Delete' buttons.

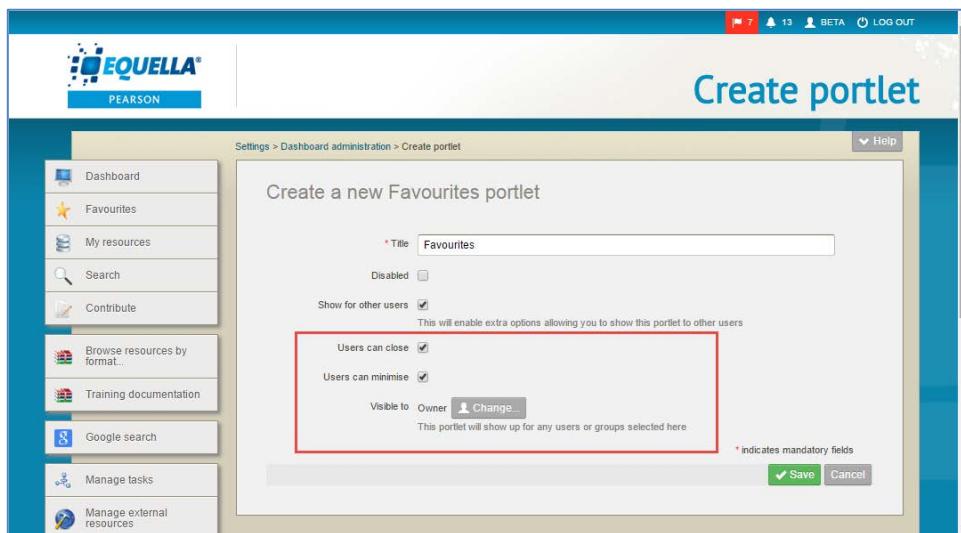
**Figure 32 'What would you like to add to your Dashboard' section**

2. Select a portlet type from the list (e.g. *Favourites*). The relevant portlet editor displays. The screen elements are the same for the *Favourites*, *Browse*, *Tasks*, *My Resources* and *Quick Search* editors. For information on other portlet editors, see [Portlet editors](#) on page 33. An example of the *Favourites* portlet editor is shown in Figure 33.



**Figure 33** Favourites portlet editor

3. Change the default **Title**, if required.
4. Leave the **Disabled** checkbox unchecked. This checkbox can be selected if the portlet needs to be disabled at some point in the future. Disabling the portlet will prevent it from displaying on the Dashboard page. Unchecking the box will reinstate the portlet.
5. Check the **Show for other users** checkbox. Selecting this option means that other users, in addition to the logged in administrator, will see this portlet. Left unchecked, only the logged in user can view the portlet. Additional options display once this box is selected. An example is shown in Figure 34.



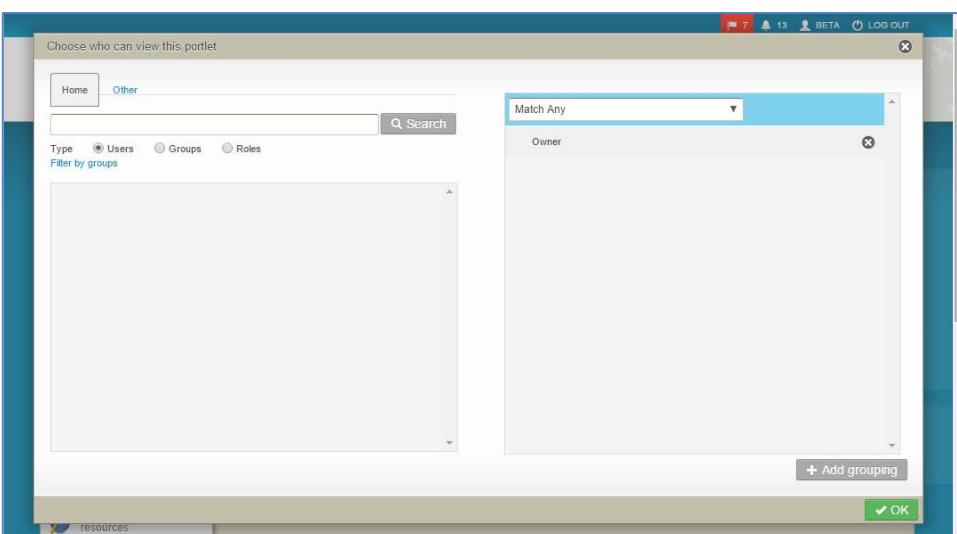
**Figure 34** Additional options

6. Check the **Users can close** checkbox. This allows users to close the portlet from the Dashboard page by clicking on the top right of the portlet. The button does not display if this option is left unchecked. An example of a portlet as it displays on the Dashboard page is shown in Figure 35.



**Figure 35 Favourites portlet**

7. Check the **Users can minimise** checkbox. This allows the user to click the arrow button to the left of the portlet name to minimise the portlet. Click to expand the portlet. The minimise and expand arrows do not display if this option is left unchecked.
8. In the **Visible to** field, click to display the **Select recipients** page. An example is shown in Figure 36.



**Figure 36 Select recipients page**

9. Select the users, groups, roles or other option to view the new portlet then click . For more information on the Select recipients page, see [Recipient selector](#) on page 84.
10. Click to save the portlet configuration. The portlet now displays on the Dashboard page for each selected user.

## Portlet editors

### RSS or Atom feed

The RSS or Atom feed portlet allows users to have the feed displayed on the Dashboard page for easy viewing. The RSS or Atom feed portlet editor enables the configuration of the selected feed, including the *URL*, *Default number of results to show* and *Display*

options (*Show the title and description* or *Show only the title*). An example is shown in Figure 37.

The screenshot shows the configuration interface for an RSS or Atom feed portlet. It includes fields for Title (RSS or Atom feed), Disabled status, Show for other users (unchecked), URL (http://), Default number of results to show (maximum 30), and Display options (Show the title and description). A note indicates that asterisks (\*) denote mandatory fields. At the bottom are Save and Cancel buttons.

**Figure 37 RSS or Atom feed portlet editor**

## Recent contributions

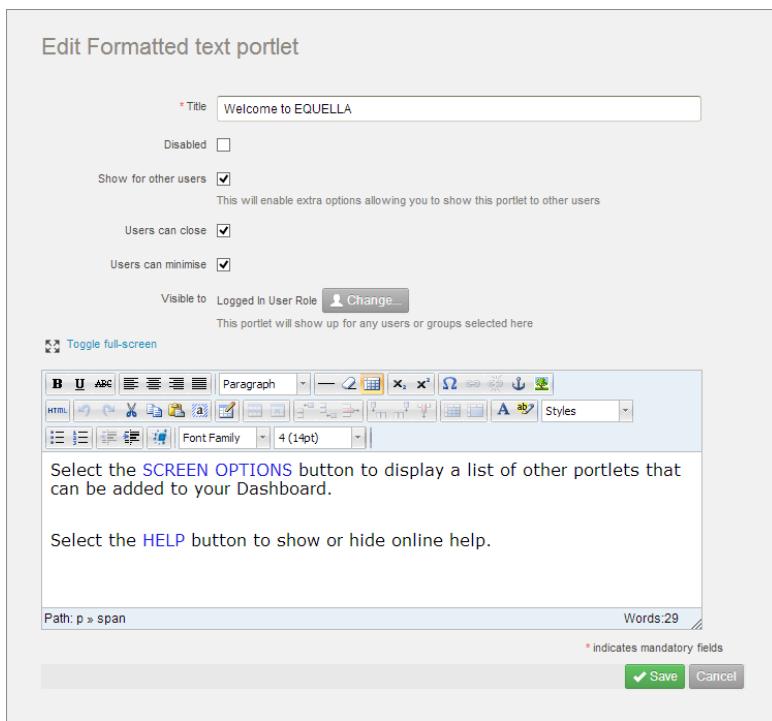
The recent contributions portlet enables the user to view resources they have recently contributed to the EQUELLA repository. The Recent contributions portlet editor allows the user to configure viewing options, including specific collections, resources with a certain status, the maximum age in days and display options (*Show the title and description* or *Show only the title*). An example is shown in Figure 38.

The screenshot shows the configuration interface for a Recent contributions portlet. It includes fields for Title (Recent contributions), Disabled status, Show for other users (unchecked), Collections (All resources selected, with Books, eReserve articles, Journals, Learning resources, and Teaching resources as options), Status (All statuses), Query, Maximum age in days (30), and Display options (Show the title and description). A note indicates that asterisks (\*) denote mandatory fields. At the bottom are Save and Cancel buttons.

**Figure 38 Recent contributions portlet editor**

## Formatted text

The Formatted text portlet enables the administrator to create a portlet containing formatted text, which displays on the Dashboard page for the selected users. An example is a welcome message. The Edit Formatted text portlet page contains an HTML Editor in addition to the standard elements. See the *EQUELLA HTML Editor User Guide* for more information. An example is shown in Figure 39.



**Figure 39 Edit Formatted text portlet page**

### Scripted portlet

The Scripted portlet enables the user to create a custom display using advanced scripting. FreeMarker scripts can be saved prior then selected from the **Load a script** dropdown (see [User scripts](#) on page 81). See the *EQUELLA Scripting Guide (Advanced)* for further information. An example of the Scripted portlet editor is shown in Figure 40.

Create a new Scripted portlet

\* Title

Disabled

Show for other users   
This will enable extra options allowing you to show this portlet to other users

Freemaker / HTML  Server-side script  Client-side on-ready script

**Freemarker markup**  
HTML to display for this portlet. Freemarker mark-up can be used here.

1

Enter the urls of any external css files you wish to load:

**CSS file**

\* indicates mandatory fields

**Figure 40 Create a new Scripted portlet page**

### Task statistics portlet

The Task statistics portlet enables administrators to view statistics associated with Workflow moderation tasks. See the *EQUELLA Workflow Moderation User Guide* for more information. An example of the Task statistics portlet editor is shown in Figure 41.

Create a new Task statistics portlet

\* Title

Disabled

Show for other users   
This will enable extra options allowing you to show this portlet to other users

Default trend  Weekly  Monthly

\* indicates mandatory fields

**Figure 41 Tasks statistics portlet editor**

### Web page portlet

The Web page portlet enables the administrator to create a portlet which shows a web page, and displays on the Dashboard page for the selected users. The Edit Web page portlet page contains a URL field in addition to the standard elements. An example is shown in Figure 42.

Create a new Web page portlet

\* Title

Disabled

Show for other users   
This will enable extra options allowing you to show this portlet to other users

\* URL

\* indicates mandatory fields

**Figure 42 Edit Web page portlet**

An example of the Web page portlet displayed on the Dashboard is shown in Figure 43.

The screenshot shows the EQUELLA Dashboard. On the left is a vertical navigation bar with icons for Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format, Training documentation, Google search, Manage tasks, Manage external resources, Manage resources, Manage activations, Reports, and Settings. The 'Dashboard' icon is highlighted with a red box. The main content area is titled 'Dashboard'. It features a 'Welcome to EQUELLA' message and a 'Web page' portlet. The 'Web page' portlet displays the Pearson logo and a banner for the '2014 CODiE Awards Winner'. Below the portlet are sections for 'Quick search' and 'Browse'.

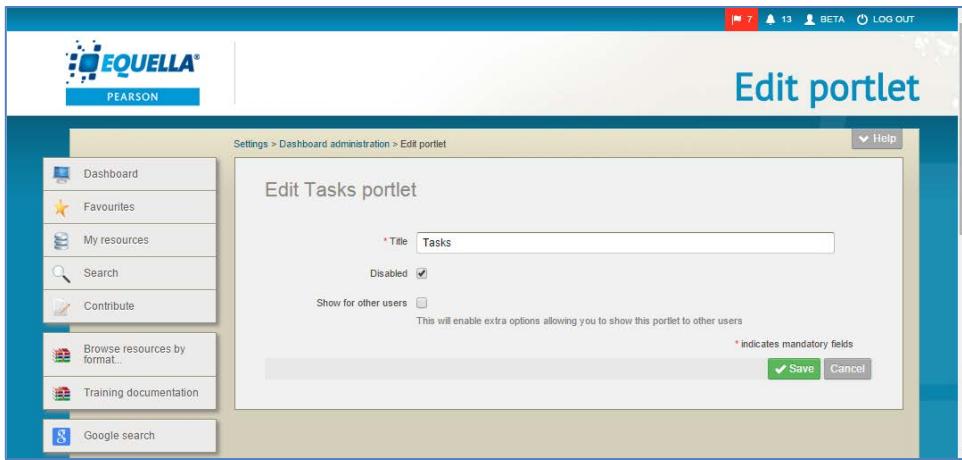
**Figure 43 Web page portlet on Dashboard**

## Edit portlets

Once created, portlets can be edited. All the properties configured when the portlet is created are editable.

### To edit a portlet

1. Click for the required portlet. The relevant portlet editor displays. An example of a Tasks portlet is shown in Figure 44.

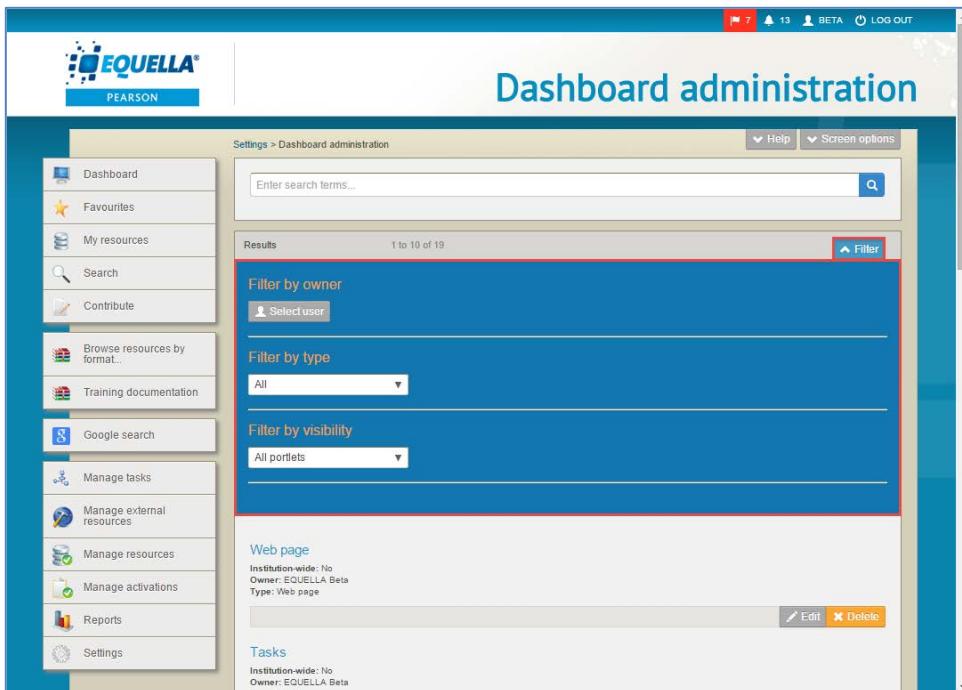


**Figure 44 Edit Tasks portlet**

2. Make the required changes.
3. Click **Save** to save the changes.

## Filter results

The **Filter** tab (shown in Figure 45) provides options for reducing the number of displayed results.



**Figure 45 Filter tab**

The following filters are included:

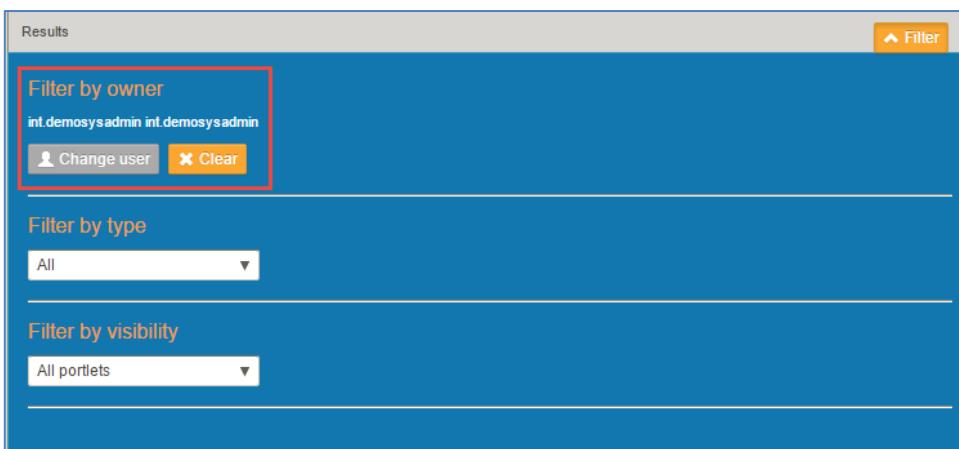
### Filter by owner

Click **Select user** to display the **Select user(s)** dialog. Enter search terms and click **Search** to display a list of matching results. An example is shown in Figure 46.



**Figure 46 Select owner to filter by dialog**

Select a user (e.g. *equellademo*) then click **Select this user** to filter the results to those owned by the selected user. The selected owner is displayed in the **Filter by owner** pane. An example is shown in Figure 47.



**Figure 47 Filter by owner pane**

The owner selected can be changed by clicking **Change user**, or removed by clicking **Clear**.

### Filter by type

Select the required Type from the drop-down list to see only portlets of the selected type. Options are *All*, *Favourites*, *Scripted*, *Web page*, *Browse*, *Quick search*, *Task statistics*, *My resources*, *RSS or Atom feed*, *Formatted text*, *Tasks* and *Recent contributions*.

### Filter by visibility

Select the required option from the drop-down list. Options are:

- **All portlets**
- **Portlets visible to others**—all portlets where the option **Show for other users** is checked.

- **User portlets**—all portlets where the option **Show for other users** is unchecked.  
(Only displays for the user that created the portlet.)

## Diagnostics

The **Diagnostics** function allows administration users to view information about users. It currently contains two tools:

- **View groups for a user** – select a user to display all the groups to which that user has been added.
- **View users in a group** – select a group to display all the group members.

### To view groups for a user

1. Select the **Diagnostics** link from the Settings page. The **Diagnostics** page displays, as shown in Figure 48.

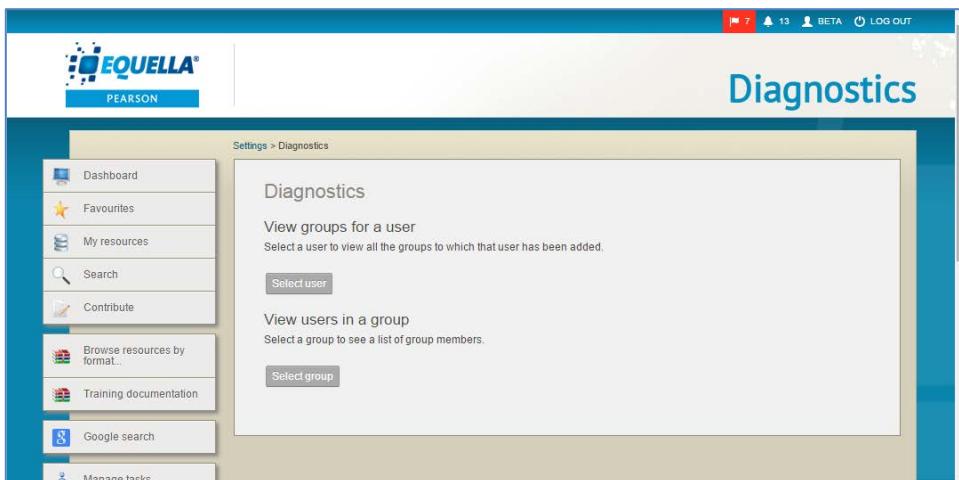


Figure 48 Diagnostics page

2. Click **Select user** in the **View groups for a user** section to open the **Select user** dialog. An example is shown in Figure 49.



Figure 49 Select user dialog

3. Search for and select the required user, then click  Select this user. A table displays showing all groups that the selected user belongs to. An example is shown in Figure 50.

The screenshot shows the EQUILLA Diagnostics page. On the left is a sidebar with various links: Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format, Training documentation, Google search, Manage tasks, Manage external resources, Manage resources, and Manage activations. The main content area is titled 'Diagnostics' and contains two sections: 'View groups for a user' and 'View users in a group'. Under 'View groups for a user', there is a button 'Change user' followed by a list box titled 'Groups for Jo Bloggs' containing the following items: Science Dept Approvers, EQUILLA 101, Contributors, EQUILLA 201, and INT - Students. This list box is highlighted with a red border. Below it is another section 'View users in a group' with a 'Select group' button.

**Figure 50 Diagnostics page with groups listed for selected user**

Click **Change user** to select a different user.

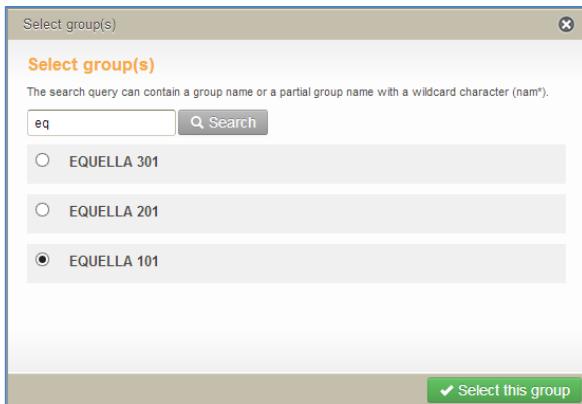
### To view users in a group

1. Select the **Diagnostics** link from the Settings page. The **Diagnostics** page displays, as shown in Figure 51.

This screenshot is identical to Figure 50, showing the EQUILLA Diagnostics page. The sidebar and the 'View groups for a user' section are the same. However, the 'View users in a group' section below it is now active, indicated by a red border around its 'Select group' button. The rest of the page content is identical to Figure 50.

**Figure 51 Diagnostics page**

2. Click **Select group** in the **View users in a group** section to open the **Select group** dialog. An example is shown in Figure 52.



**Figure 52 Select group dialog**

3. Search for and select the required group, then click **✓ Select this group**. A table displays showing all users in the selected group. An example is shown in Figure 53.

**Figure 53 Diagnostics page with groups listed for selected user**

Click **Change group** to select a different user.

## Display date format

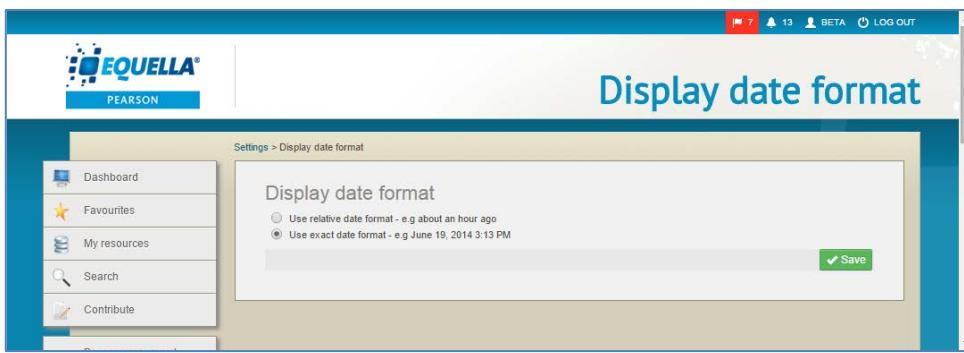
The **Display date format** function allows administration users to configure the default system display date format for dates pertaining to resource activities. The selections are:

- **Use relative date format – e.g. about an hour ago**
- **Use exact date format – e.g. June 19, 2013 3:13 PM**

*NOTE: When one format is selected as the default, the other format displays on mouse-over of the date.*

### To set the display date format

1. Select the **Display date format** link from the Settings page. The **Display date format** page displays, as shown in Figure 54.

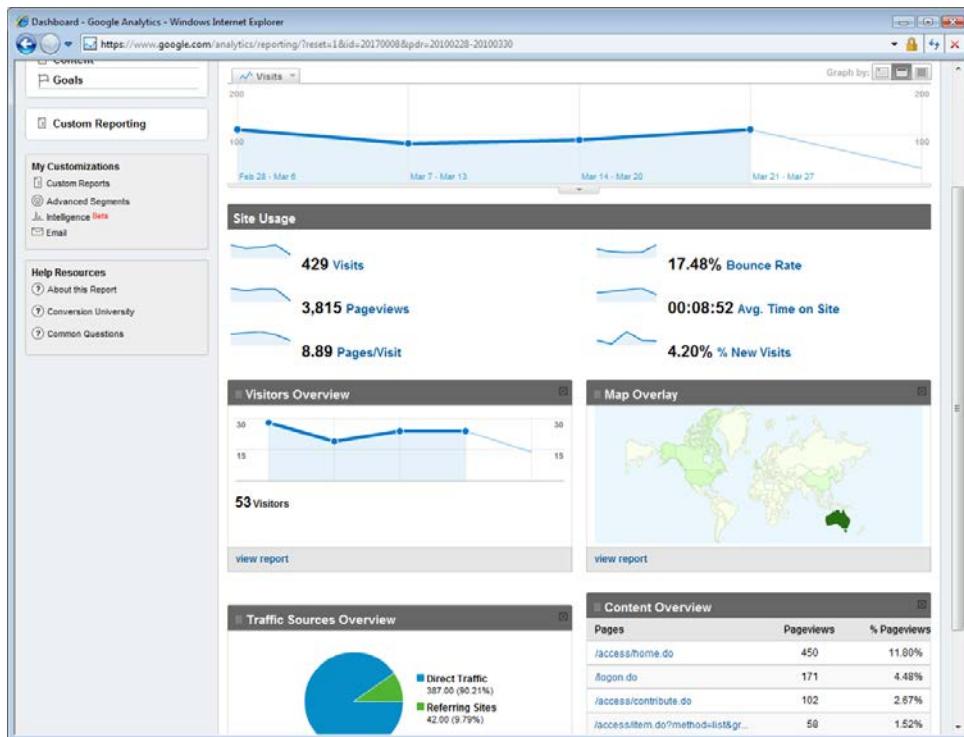


**Figure 54 Display date format page**

2. Select the required display date format to be used as a default, then click

## Google Analytics™ configuration

Google Analytics is a free service offered by Google™ that is used to monitor site traffic and provide metrics for site development. An example is shown in Figure 55.



**Figure 55 Website data provided by Google Analytics**

## EQUELLA configuration

To track website traffic a Google Analytics account must be created and the Account ID (e.g. UA-12345678-1) added to EQUELLA.

1. Select the **Google analytics** link from the Settings page. The **Google Analytics** page displays, as shown in Figure 56.

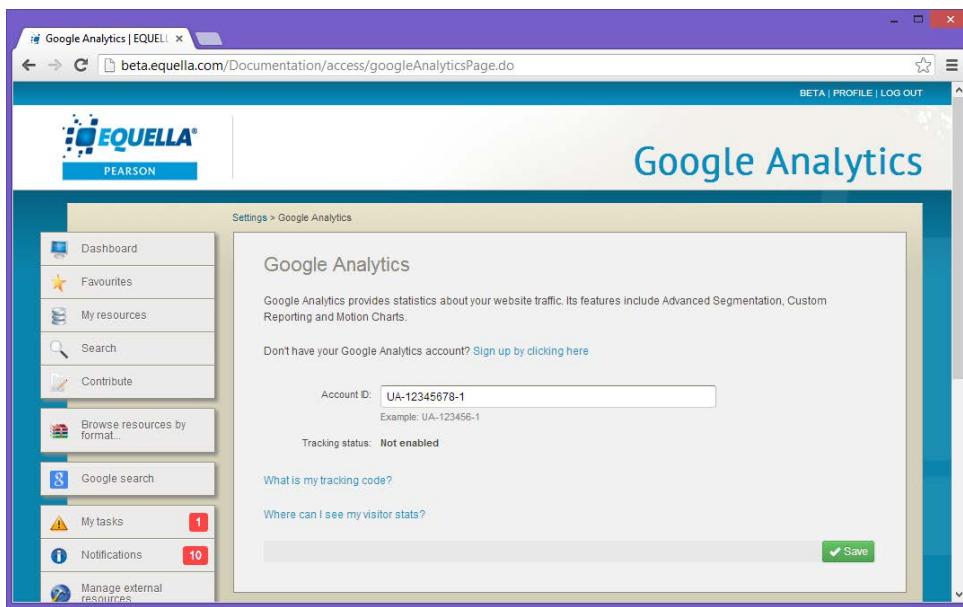


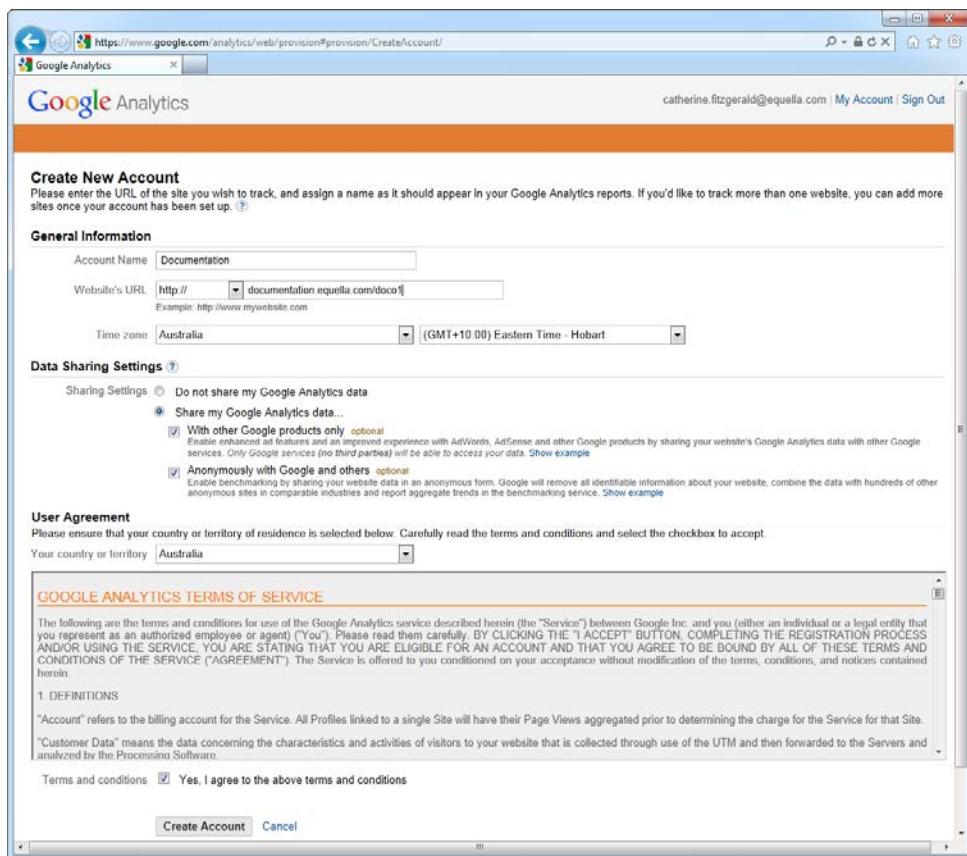
Figure 56 EQUELLA Google analytics page

The Google Analytics page elements include:

- **Account ID**—enter the Tracking ID number provided by Google Analytics after creating an account (e.g. *UA-12345678-1*).
- **Save**—click to enable or disable tracking.
- **Tracking Status**—displays the current tracking state as **Not Enabled** or **Enabled**.
- **Help links:**
  - **Don't have your Google Analytics account?**—click **Sign up by clicking here** to register with Google Analytics at [http://www.google.com/analytics/sign\\_up.html](http://www.google.com/analytics/sign_up.html). Refer to the [Register with Google Analytics](#) section for more information.
  - **What is my tracking code?**—click to display the **Google Analytics Help** page.
  - **Where can I see my visitor stats?**—click to display the Google Analytics login page at <http://www.google.com/analytics/>. Refer to the [Analytics data for your institution](#) section on page 46 for more information.

## Register with Google Analytics

1. Register with Google Analytics by creating an account (e.g. *googleanalytics@equella.com*) at [http://www.google.com/analytics/sign\\_up.html](http://www.google.com/analytics/sign_up.html).
2. Sign up for a new Google Analytics account using the URL of your EQUELLA institution (e.g. '<http://equella.myinstitution1.edu>' or '<http://equella.edu/myinstitution1>'). An example is shown in Figure 57.



**Figure 57 Google Analytics: New Account Signup page**

3. Complete the account setup form and click **Create Account**.

An Overview of your Analytics Account is provided with the Google Analytics **Tracking ID** (e.g. *UA-12345678-1*) in to the Account ID field.

## Add the tracking ID to EQUELLA

To start tracking website traffic the Google Analytics account ID (e.g. *UA-12345678-1*) must be added to EQUELLA.

1. Select Google Analytics to display the Google Analytics page.
2. Enter the Google Analytics Tracking ID (e.g. *UA-12345678-1*).
3. Click **Save** to change the Tracking Status to Tracking Enabled. An example is shown in Figure 58.

The screenshot shows the Google Analytics setup page. It includes fields for Account ID (UA-12345678-1), Tracking status (Not enabled), and links for 'What is my tracking code?' and 'Where can I see my visitor stats?'. A green 'Save' button is at the bottom.

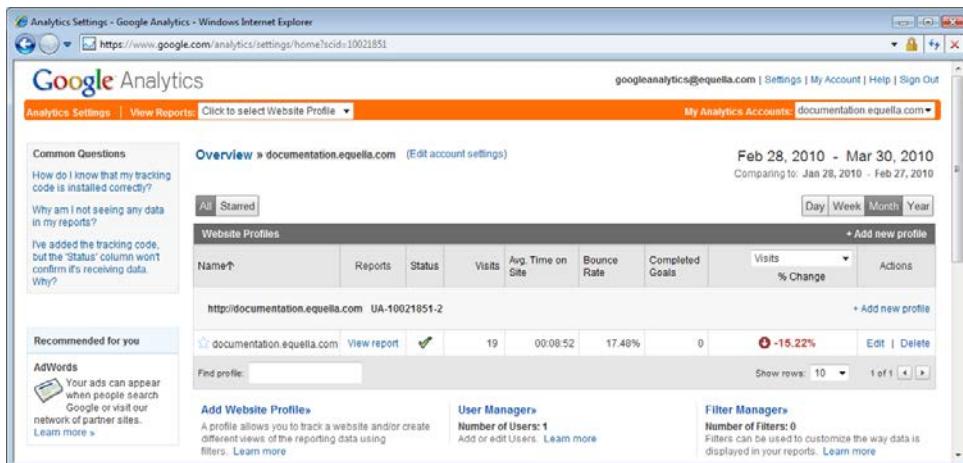
**Figure 58 EQUELLA Google Analytics page—Tracking Enabled**

## Analytics data for your institution

(Note: *It can take up to 24 hours before any data is received.*)

### To display the analytics data

1. Log in to your Google Analytics Account (e.g. [googleanalytics@equella.com](mailto:googleanalytics@equella.com)) at <http://www.google.com/analytics/reporting/> to display the data for your institution. An example is shown in Figure 59.



**Figure 59 Account profile**

### To view a report

1. Click the **View Report** link to display the data. An example is shown Figure 55.

### To change the profile settings

1. Click the **Edit** link next to the required institution.

### To delete an institution

1. Select the **Delete** link next to the required institution.

## Track multiple institutions

Multiple institution profiles can be added and tracked.

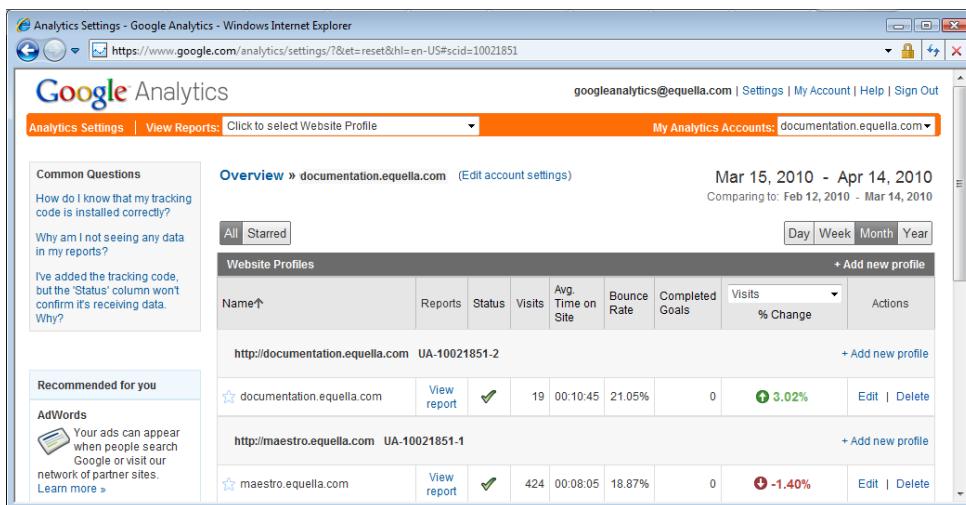
### To add a new profile

1. Select the Add new profile link to display the Create New Website Profile page.
2. Select the Add a Profile for a new domain radio button in the Choose Website Profile Type section.
3. Enter the details using the URL of your EQUELLA institution (e.g. '<http://equella.edu/myinstitution2>').
4. Click the Continue button to display the Tracking Status Information.
5. Click the Save and Finish button to complete the setup.
6. Add the Google Analytics account ID (e.g. *UA-12345678-2*) to the EQUELLA Institution. Refer to the [Add the tracking ID to EQUELLA](#) section on page 45 for more information.

## Analytics data for multiple institutions

### To display the data for multiple accounts

1. Log in to your Google Analytics Account. An example is shown in Figure 60.



**Figure 60 Multiple account profiles**

### To close the Google Analytics account

1. Click the **Sign Out** button.

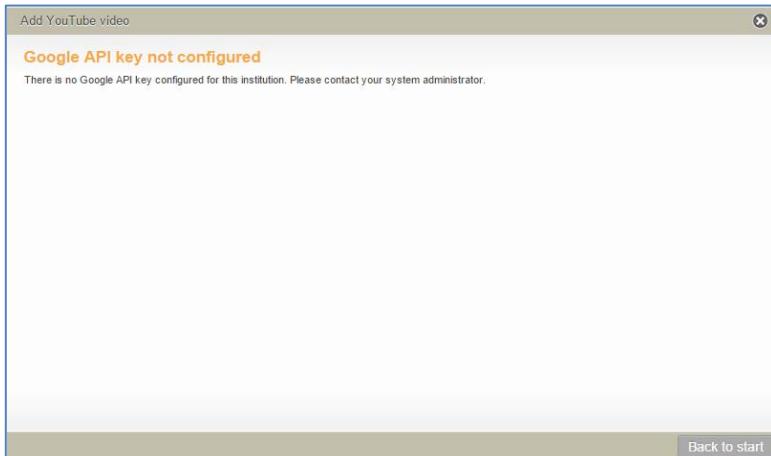
### To log out of the System administration account

1. Click the **Log out** button.

## Google API

The **Google API** option allows a Google API key (with the YouTube Data API (v3) enabled) to be stored in EQUELLA. This allows users to search and select YouTube content from an attachment control during contribution.

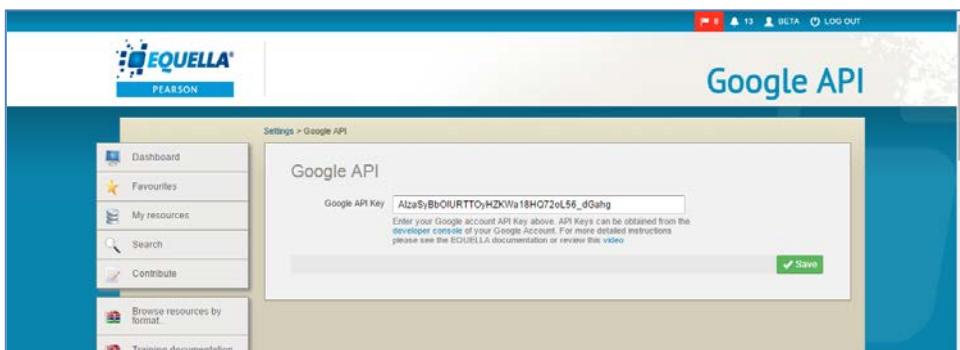
*NOTE: If the Google API key is not configured in EQUELLA, existing YouTube links will continue to open and play. However, searching for new YouTube content during contribution or editing of resources will result in the following message being displayed:*



**Figure 61 Message when no Google API key configured**

### To configure the Google API Key

1. Select the **Google API** from the Settings page. The **Google API** page displays. An example is shown in Figure 62.



**Figure 62 Google API page**

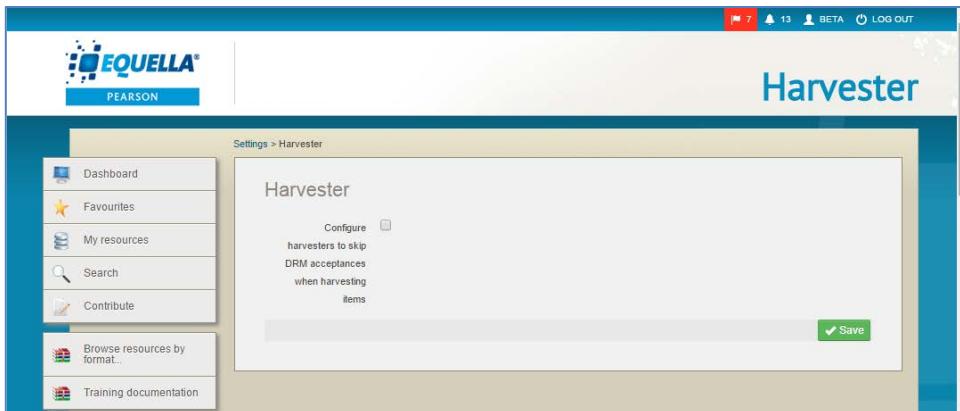
2. Enter the **Google API Key** as provided by Google. API Keys can be obtained from the [Developers Console](#) site after creating a project. For step-by-step instructions to obtain a Google API Key (with YouTube Data API (v3) enabled), use the **video** link on the Google API page or click [here](#).
3. Click **Save**.

## Harvester

The Harvester page allows the user to set harvesters to ignore DRM acceptances when harvesting resources.

### To configure the Harvester option

1. Select the **Harvester** link from the Settings page. The **Harvester** page displays, as shown in Figure 63.



**Figure 63** Harvester page

2. Check the **Allow harvesters to skip DRM acceptances when harvesting items** checkbox.
3. Click **Save**.

## Kaltura

The Kaltura server settings page allows the user to configure Kaltura-streaming media servers and their access details. Multiple Kaltura servers can be configured, which may include Kaltura SaaS servers and local Kaltura servers.

### To access Kaltura server settings

1. Select the **Kaltura settings** link from the Settings page. The **Kaltura settings** page displays with any current servers listed, as shown in Figure 64.



Figure 64 Kaltura settings page

### To add a Kaltura server

- From the **Kaltura servers** page, click the **Add Kaltura server** link. The **Add new Kaltura server** page displays, as shown in Figure 65.

A screenshot of the EQUILLA interface showing the 'Edit Kaltura server' form. The left sidebar includes links for Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format, Training documentation, Google search, Manage tasks, Manage external resources, Manage resources, Manage activations, Reports, and Settings. The main content area is titled 'Edit Kaltura server' and contains fields for UUID (ea3e3d1-1512-4a40-a4ff-0b645b71f1b8), Name (Kaltura.com SaaS), Description, Endpoint (http://www.kaltura.com), Partner ID (794862), Sub partner ID, Administrator secret (3ed91bc51898104f0facd07684f2ccc), and User secret (541b9c75a8e366c09aebe8fb3cb943897). A note indicates that asterisks (\*) denote mandatory fields. At the bottom, the Test status is 'Not tested' and there is a 'Test connection' button, along with 'Save' and 'Cancel' buttons.

Figure 65 Add new Kaltura server page

- Enter a **Name** (mandatory) and **Description** (optional) for the Kaltura server.
- Enter the Kaltura **Endpoint**, which is the Kaltura server address. For example, the Kaltura SaaS server address is <http://www.kaltura.com>.
- Enter your institution's **Partner ID**, **Sub partner ID** (optional), **Administrator secret** and **User secret** (see [Accessing Kaltura connection details](#) below).

5. Click  **Test connection**. The **Test status** changes from *Not tested* to  **Successfully connected to Kaltura**. If the test is not successful, go back and check your Kaltura details (see [Accessing Kaltura connection details](#) below).

(*NOTE: The EQUELLA Kaltura server settings cannot be saved until they have been tested successfully.*)

6. Once the connection is successful, **Select default player** for Kaltura resources accessed from this server from the drop-down list. The *EQUELLA default player* will always display in the list, along with other players that may be configured for your Kaltura instance.
7. Click  **Save**. The Kaltura server now displays in the list.

### To edit a Kaltura server

1. Go to **Settings, Kaltura**. The **Kaltura servers** page displays.
2. Click the **Edit** link beside the relevant Kaltura server. The **Edit Kaltura server** page displays.
3. Make the required changes, then click  **Save**.

### To delete a Kaltura server

1. Go to **Settings, Kaltura**. The **Kaltura servers** page displays.
2. Click the **Delete** link beside the relevant Kaltura server. A confirmation dialog displays.
3. Click  **OK** to proceed.

### To disable a Kaltura server

1. Go to **Settings, Kaltura**. The **Kaltura servers** page displays.
2. Click the **Disable** link beside the relevant Kaltura server. The server is disabled, and the link changes to **Enable**.

*NOTE: Disabled servers are unavailable to users both for contributing and viewing Kaltura resources.*

### To enable a Kaltura server

1. Go to **Settings, Kaltura**. The **Kaltura servers** page displays.
2. Click the **Enable** link beside the relevant Kaltura server. The server is enabled, and the link changes to **Disable**.

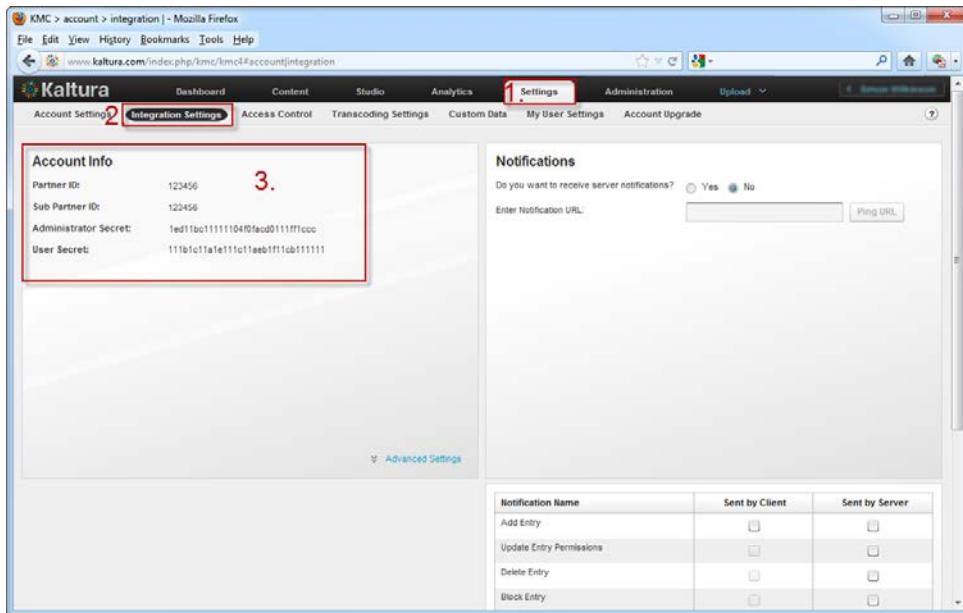
## Accessing Kaltura connection details

If the institution's **Partner ID**, **Administrator secret** and **User secret** have not been recorded, an administration user needs to log in to the Kaltura server to access these details.

### To access Kaltura details

1. Open a web browser and enter the Kaltura server address (e.g. <http://www.kaltura.com> for SaaS, or the local server address with /kmc appended). For example, <http://myinstitution/equelle/kulturaserver1/kmc>.

2. **Login** using your institution's Kaltura KMC (Kaltura Management Console) details.
3. Once successfully logged in, click the **Settings** tab, then the **Integration Settings** link. The **Account Info** displays. An example is shown in Figure 66.



**Figure 66 Kaltura Settings | Integration Settings | Account info page**

4. Note the **Partner ID**, **Sub Partner ID** (not currently used), **Administrator secret** and **User secret** details, which are the fields required to set up the Kaltura server in the EQUELLA system.

## Languages

The Languages page enables the use of multiple languages within EQUELLA and provides customisation of EQUELLA labels and text (e.g. display titles and error messages) to specific locales. It provides controls for managing **Language packs** and **Contribution languages**. An example is shown in Figure 67.

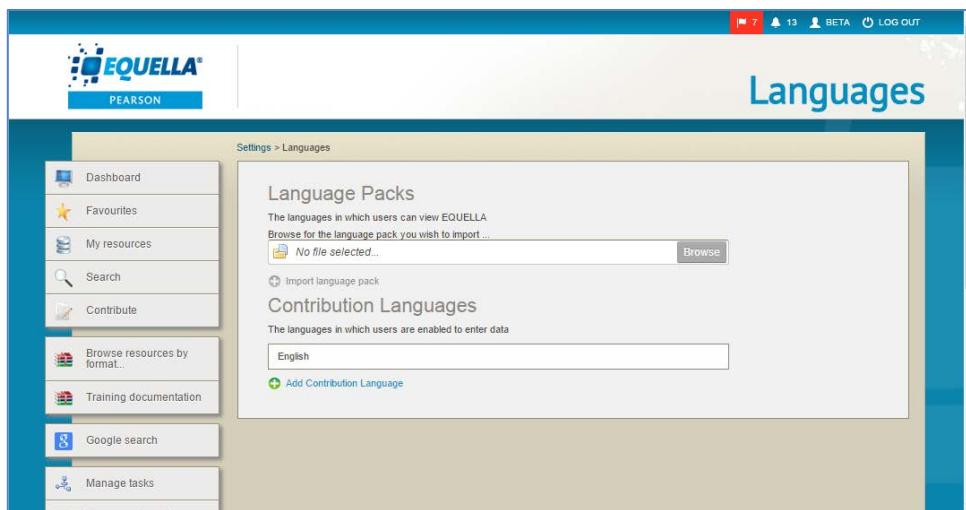


Figure 67 Languages page

## Language settings

### Language packs

Language packs allow the default controls in EQUILLA to display institution-specific text such as display titles or error messages and allow users to select a preferred language for the user interface display.

### Contribution languages

Contribution languages are defined by country and locale to allow for variations in language or dialect in different regions, for example English (United States) (en-US), English (Australia) (en-AU) and English (United Kingdom) (en-GB). Selecting a contribution language allows the user to customise any content that is added or contributed to the EQUILLA Digital Repository.

Further information on language configuration is provided in the *EQUILLA Language Settings Configuration Guide*.

### Display languages

The default display language setting is that of the browser where the EQUILLA instance is being viewed. Languages imported as language packs can be selected in the EQUILLA Digital Repository as the preferred display language. Selecting a preferred display language will override the browser locale setting.

Users can select their preferred display language on the **Profile** page accessed by clicking on their username at the top of EQUILLA pages. An example is shown in Figure 68.

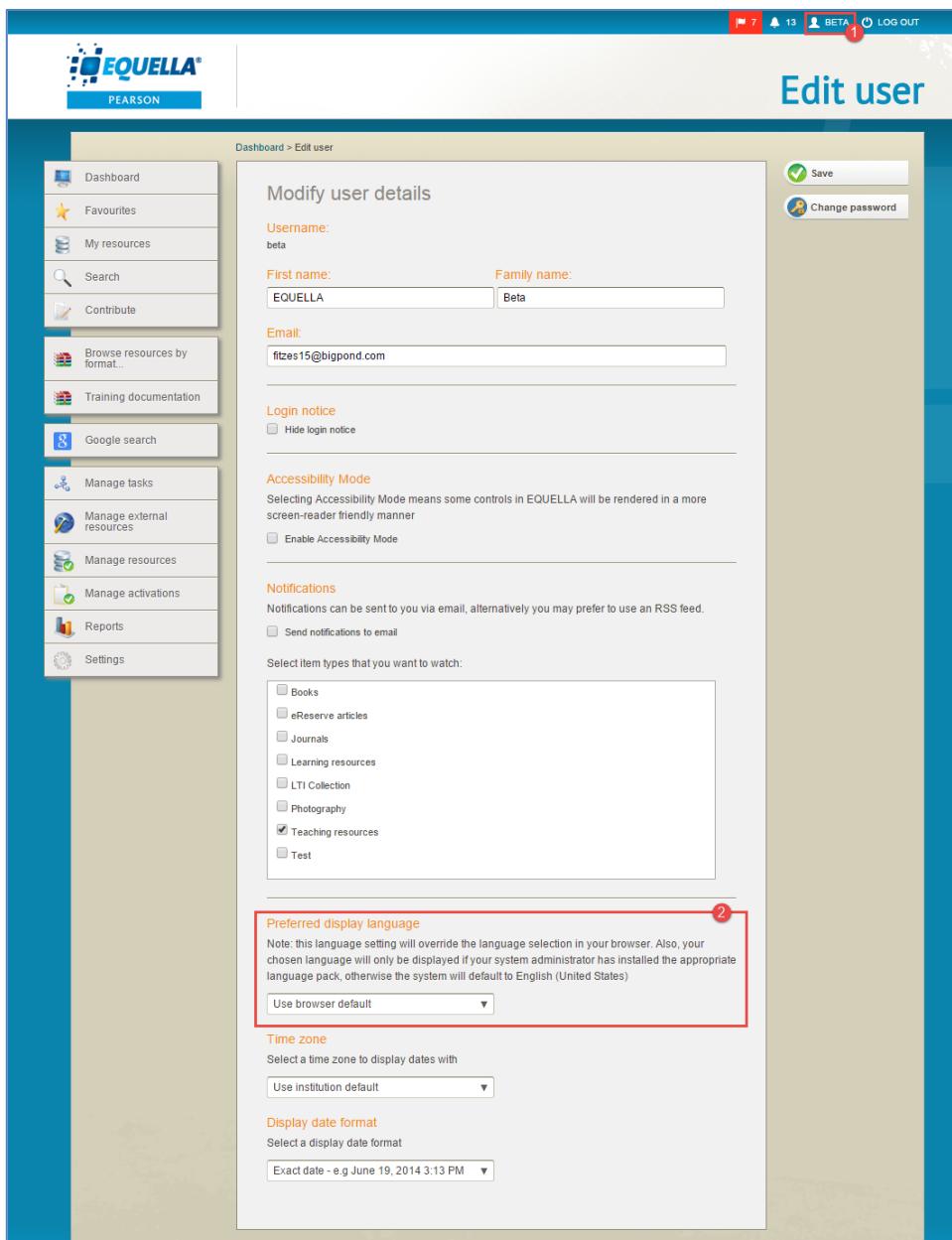


Figure 68 Profile page—Preferred display language

## Logged in users

The **Logged in users** page provides administrators with a list of all currently logged in users.

To display a list of users currently logged in to the institution

1. Select the **Logged in users** link from the Settings page. The **Logged in users** page displays. An example is shown in Figure 69.

The screenshot shows the EQUILLA Administration Console interface. At the top, there is a navigation bar with icons for search, notifications, user status (BETA), and log out. Below the navigation bar, the title 'Logged in users' is displayed. On the left, a sidebar menu includes 'Dashboard', 'Favourites', 'My resources', 'Search', 'Contribute', 'Browse resources by format...', and 'Training documentation'. The main content area is titled 'Logged in users' and shows a table with two sessions:

Username	Address	Logged in	Last access
beta	110.142.112.101	18 May 2015 2:40 PM	18 May 2015 2:41 PM
JBloggs	110.142.112.101	18 May 2015 2:40 PM	18 May 2015 2:40 PM

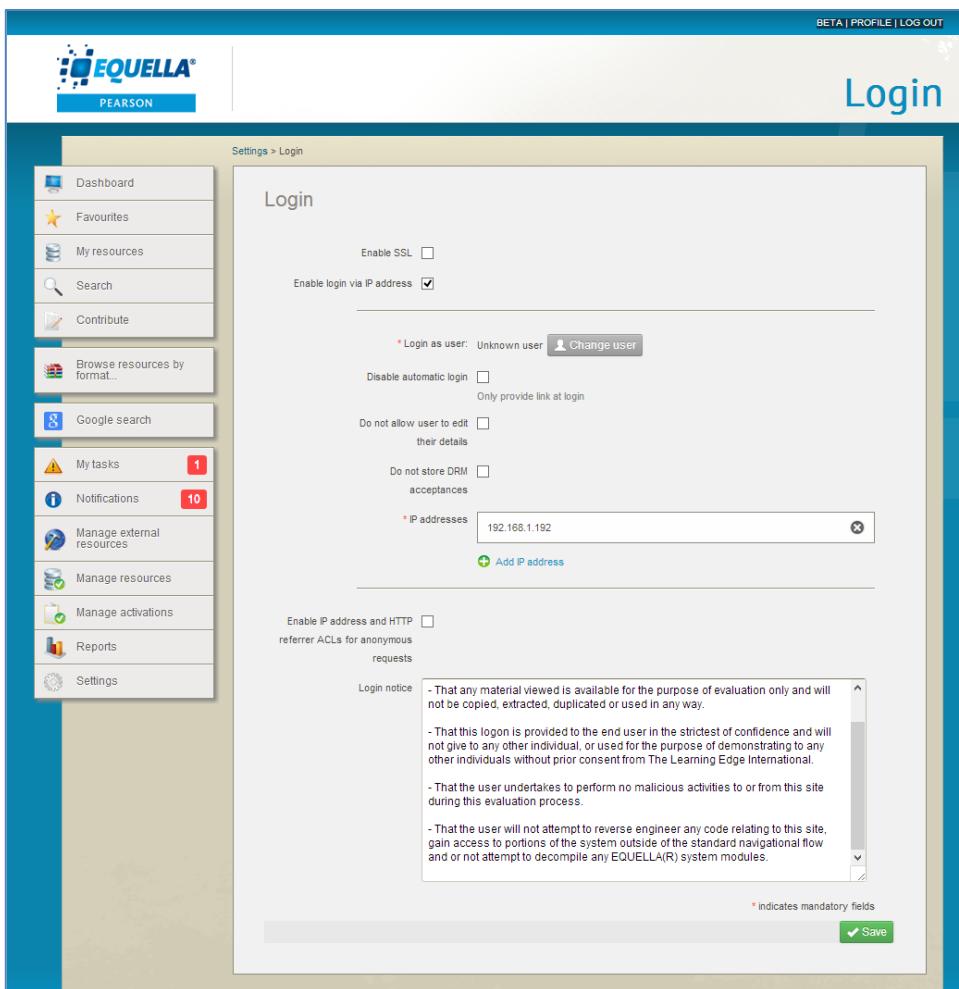
Figure 69 Logged In Users page

## Login

The Login settings page comprises a series of controls for configuring login and authentication by IP address.

If SSL connections are to be used, it is important to note that the EQUILLA server must be configured to allow SSL connections prior to enabling SSL for the institution. Otherwise the institution will not be able to receive connections, thus effectively locking out all users. Ensure the Administration Console remains open until connections have been tested after this option has been enabled, to allow the disabling of SSL in the event of an error.

An example of the Login page is shown in Figure 70.



**Figure 70 Login page**

## To enable SSL login

(Note: Do not check this box unless SSL has been setup on the server.)

1. Check the **Enable SSL** checkbox to enable SSL connections to the institution.

The institution login URL will be redirected from, for example:

'<http://equella.myinstitution.edu/logon.do>' to

'<https://equella.myinstitution.edu/logon.do>'.

## To configure login by IP address

1. Check the **Enable login via IP Address** box to enable the login options. The relevant options display on the page, as shown in Figure 71.

The screenshot shows a configuration page for enabling login via IP address. At the top, there is a checked checkbox labeled "Enable login via IP address". Below it, there is a section for selecting a user, with a note that it defaults to the current user. There is also a "Change user" button. Underneath, there are three checkboxes: "Disable automatic login" (unchecked), "Only provide link at login" (unchecked), and "Do not allow user to edit their details" (unchecked). Further down, there is a checkbox for "Do not store DRM acceptances" (unchecked). A section for "IP addresses" contains a text input field with the value "192.168.1.192" and a delete button. Below this is a "Add IP address" button. At the bottom, there is another checkbox for "Enable IP address and HTTP" (unchecked).

**Figure 71 Enable login via IP Address options**

2. **Login as user:** defaults to the current user. Click **Change user** to display the **Select user(s)** dialog.
3. Enter a search value then click **Search**. An example is shown in Figure 72.



**Figure 72 Select user(s) dialog**

4. Select the required user then click **Select this user** to populate the **Login as user** field.
5. Select any of the following options:
  - a. **Disable automatic login (only provide link at login)**—select this checkbox to display a link on the login page (rather than take the user to their home page).
  - b. **Do not allow user to edit their details**—select this checkbox to stop users from editing the login user details, reducing any administrative overhead.
  - c. **Do not store DRM acceptances**—select this checkbox to discard any acceptances created by this user.
6. Click the **Add IP address** link to open the **Add IP address** dialog and enter an IP address.

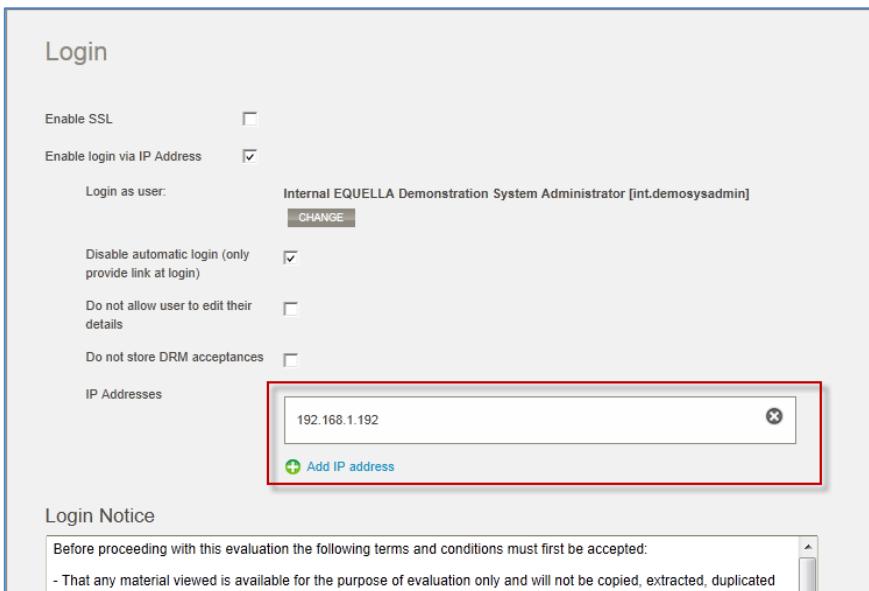
(*NOTE: Wildcards are permitted, for example 192.168.\*.\*.*)

7. An example is shown in Figure 73.



**Figure 73 Add IP address dialog**

8. Click **✓ OK** to add the IP address to the list of addresses. An example is shown in Figure 74.



The screenshot shows the 'Login' configuration page. In the 'IP Addresses' section, there is a list box containing the IP address '192.168.1.192'. This list box is highlighted with a red border. Below the list box is a blue button with a plus sign and the text 'Add IP address'.

**Figure 74 IP Address list**

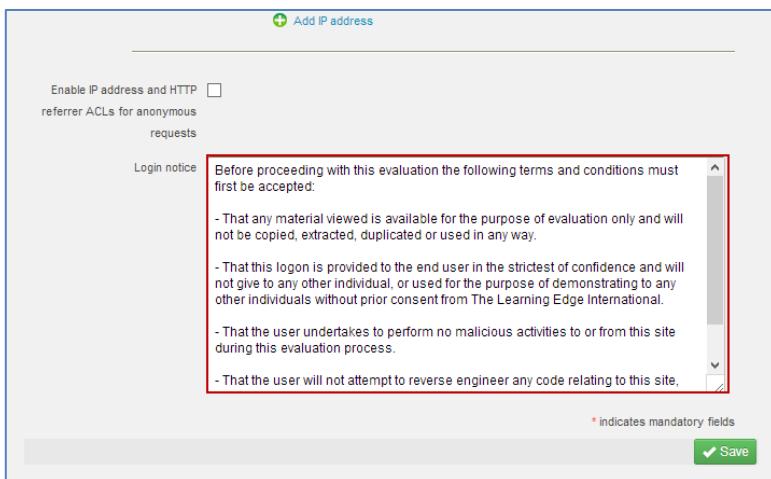
9. Click the **Add IP address** link to add another IP address if required.
10. Click **✓ Save** to save the changes.

#### To remove an IP address

1. Click **✗** beside the IP address to be removed.
2. Click **✓ Save** to save the changes.

## Login Notice

The Login Notice section is used to edit the notice that appears when users log in to EQUELLA. Figure 75 shows the **Login Notice Editor** where text can be entered, copied, pasted and deleted.

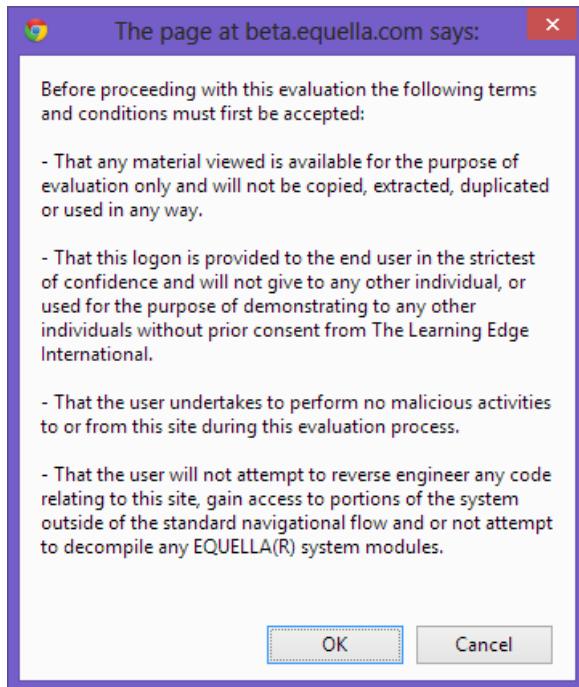


**Figure 75 Login Notice Editor**

### To edit text

1. Move the cursor to the position for the edit.
2. Enter, paste or delete the text, as required, then click **✓ Save**.

Figure 76 shows the notice as displayed to users at login.



**Figure 76 User view of login notice**

(Note: Deleting all the text prevents the login notice being displayed to users.)

### To hide the login notice

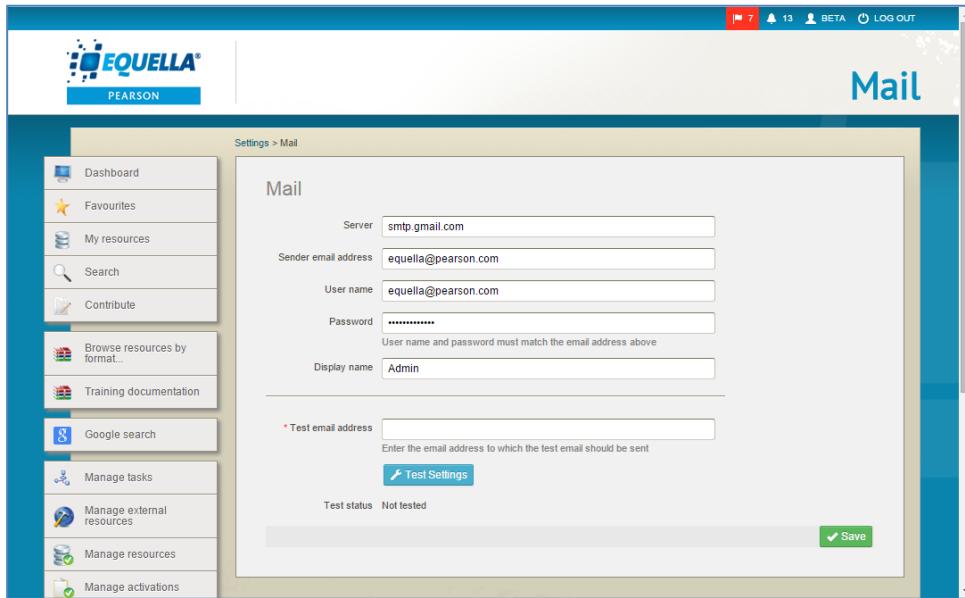
Users can conceal the login notice by checking the **Hide login notice** checkbox on the **Profile** page in the EQUELLA Digital Repository, as shown in Figure 68.

## Mail

The Mail settings page is where the mail server details are set up. EQUELLA uses the mail server to send internal emails, such as notifications.

### To set up the mail server

1. Select the **Mail settings** link from the Settings page. The **Mail settings** page displays, as shown in Figure 77.



**Figure 77** Mail settings page

2. Enter the **Email address** to serve as the sender address.
3. Enter the **Server** address.
4. Enter a **Display name** for the sender name.
5. Enter a **User name** to authenticate to the mail server.
6. Enter the **Password** for the authenticating mail server.

### To test the settings

1. Enter a valid **Test email address** to send the test email to.
2. Click **Test Settings**. A test email is sent to the Test email address. If the mail settings are incorrect, an error message displays.
3. Once successfully tested, click **Save**.

## Manual data fixes

The Manual data fixes page, shown in Figure 78, provides the following three data fix functions:

- **Generate thumbnails**—generates missing thumbnails for resources with file attachments.
- **Attachment hashing (MD5)**—calculates missing md5 hashes for attachments.

- **Refresh the content index**—sets all resources for reindexing.

(NOTE: These data fixes should only be run under instruction from the EQUELLA Support Team.)

The screenshot shows the EQUELLA administration interface. The top navigation bar includes the Pearson logo, a notification icon (7 notifications), a beta status, and a log out link. The main title is "Manual data fixes". On the left, there's a sidebar with links like Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format, Training documentation, Google search, Manage tasks, Manage external resources, Manage resources, and Manage activations. The main content area is titled "Manual data fixes" and contains three sections: "Generate thumbnails and previews" (with a "Generate thumbnails" button), "Attachment hashing (MD5)" (with a "Start hash" button), and "Refresh the content index" (with a "Refresh index" button). The "Refresh index" section includes a note about setting all items for reindexing after a timeout of 5 minutes.

Figure 78 Manual data fixes page

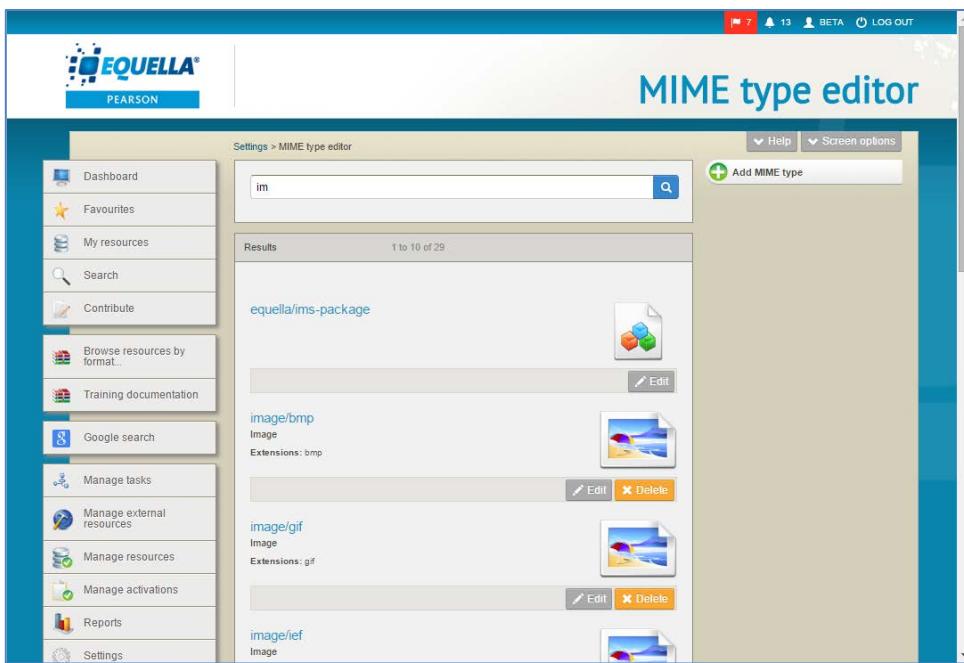
## MIME types

Administrators can search, add, delete and edit MIME types based on file extensions. The following MIME type properties can be configured:

- Descriptive name and icon.
- Enable multiple extractors to index items (for some items, such as *html*).
- Enable multiple viewers and choose a default viewer:
  - To open in a new window and control the window sizes
  - To force the user to download a file or package
  - To add a single sign-on (SSO) token
- Add a template for embedding objects when using the HTML Editor.

To configure MIME types:

1. Select the **MIME Types** link from the Settings page. The **MIME type editor** page displays with MIME type results listed. An example is shown in Figure 79.



**Figure 79 MIME types editor page**

The number of results returned is displayed and the number of results displayed per page can be set to 10 (default), 50 or 100 by clicking **Screen options**, with pages displayed at the bottom of the page when there are more results than can be displayed under the current setting. The results can be refined by entering a search term and clicking **Search**.

Each MIME type has an icon or a thumbnail depending on the MIME type, a title, a **Edit** button, and a **Delete** button. The exceptions are MIME types beginning with 'equella'. New MIME types can also be added.

### To add a new MIME type

1. Click **Add MIME type** to display the **Add MIME type** page.

### To edit a MIME type

1. Click **Edit** to display the **Edit MIME type** page. An example is shown in Figure 80.

Edit MIME type

**Details**

Description	Image
* MIME type	image/jpeg
Extensions	<input type="button" value="Add"/> <input type="button" value="Remove"/> jfif jfif jpe jpg jpeg
Current icon:	
Upload new icon:	<input type="button" value="Browse"/> <input type="button" value="Upload"/>

**Viewers**

Default	Enabled	Viewer	Configure
<input type="radio"/>	<input type="checkbox"/>	Download file	<input type="button" value="Configure"/>
<input type="radio"/>	<input checked="" type="checkbox"/>	File viewer	<input type="button" value="Configure"/>
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Gallery	<input type="button" value="Configure"/>
<input type="radio"/>	<input checked="" type="checkbox"/>	Large image viewer	<input type="button" value="Configure"/>
<input type="radio"/>	<input type="checkbox"/>	View via Google Docs	<input type="button" value="Configure"/>

**Embedding template**  
Use this template when embedding objects of this type using the HTML Editor:

```

```

Use \${url} and \${title} as placeholders for their final value. For example:  


\* indicates mandatory fields

**Figure 80 Edit MIME type page**

The **Edit MIME Type** page elements include:

## Details section

- **Description**—enter an individual description.
- **MIME Type**—enter a MIME type (this is the only mandatory field).
- **Extensions**—type the required extension then click  to add. Highlight an existing extension and click  to delete the selected extension.
- **Current icon**—displays the icon currently used for the selected MIME type.
- **Upload new icon**—if required, click  to open a stored icon file on the hard disk or network, then click .

## Viewers section

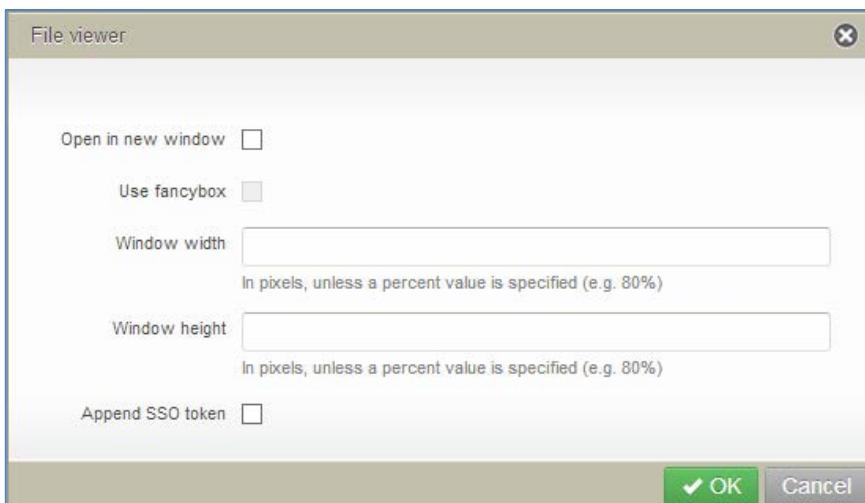
A list of viewers relevant to the MIME type is listed. An example is shown in Figure 81.

Viewers			
Default	Enabled	Viewer ▾	
<input type="radio"/>	<input type="checkbox"/>	Download file	<button>Configure</button>
<input type="radio"/>	<input checked="" type="checkbox"/>	File viewer	<button>Configure</button>
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Gallery	
<input type="radio"/>	<input checked="" type="checkbox"/>	Large image viewer	<button>Configure</button>
<input type="radio"/>	<input type="checkbox"/>	View via Google Docs	<button>Configure</button>

**Figure 81** Viewers section

The Viewers section elements include:

- **Default**—select a radio button to allocate a default viewer. When a user selects the attachment title, the attachment is displayed in the viewer selected as default.
- **Enabled**—check to enable multiple viewers as required.
- **Viewer**—lists the types of viewers available for the selected MIME type. These can include:
  - **Download File**—forces the user to save rather than view the file.
  - **Download Package**—for downloading IMS packages. This option is only available for *equella/ims-package* type and is not available in the Navigation Builder control.
  - **File Viewer**—displays the attachment in the current browser window or native application.
  - **Large Image Viewer**—displays all image types allowing the user to easily view very large, detailed images.
  - **Pretty Photo**—displays *image/jpeg*, *image/png* and *image/gif* types in a gallery style allowing the user to iterate through the images. This viewer option is not available in the Navigation Builder control.
  - **External Link Viewer**—displays external links in EQUELLA. This option is only available for *equella/link* type.
  - **Embedded Movie Player**—displays *video/x-flv* type in a flash video viewer.
  - **IE Mov Popup Fix Viewer**—displays all *video/\** types in a new IE6 or IE7 browser window.
  - **HTML Conversion**—allows *.doc*, *.xls* or *.ppt* files to be converted to HTML. (Note: *Office 2007 is not supported*.)
  - **View as JPEG image**—displays all the larger image formats (e.g. *image/bitmap*, *image/x-portable-graymap*) as a *jpg*. This viewer option is not available in the Navigation Builder control.
- **Configure**—click to open the applicable **viewer** dialog. An example of the **File viewer** dialog is shown in Figure 82.



**Figure 82 File viewer configuration dialog**

The **viewer** dialog elements can include:

- **Open in new window**—select to display the attachment in a new window.
- **Use fancybox**—check to display the attachment in a window with a wide white border. Only available if *Open in new window* is checked.
- **Window Width**—enter the required width of the display window in pixels.
- **Window Height**—enter the required height of the display window in pixels.
- **Append SSO Token**—select to add a single sign-on token. During contribution, when a file of that type is uploaded (e.g. *wmv* file), hovering over the link on the item's confirmation page or summary page shows the token appended to the URL on the bottom bar of the browser.
- **OK**—click to save the details and close the dialog.
- **Cancel**—click to close dialog without saving details.

The enabled viewer options are listed on the resource's summary page and can be available as viewer options in the Navigation Builder control. Figure 83 shows a resource summary page with *File Viewer* and *Large Image Viewer* options enabled for the *jpg* resources.

**Figure 83 Resource summary with jpg viewers**

When a user selects a viewer option (e.g. *Large image viewer*) the resource is displayed in the selected viewer. When the resource title is selected (e.g. *Jellyfish.jpg*) the resource is displayed in the viewer selected as the default.

## Embedding template section

The **Embedding Template** page allows the user to allocate the MIME types that can be embedded in the HTML Editor. The *gif*, *jpeg*, *png*, and *quicktime* types are embedded by default and can be overridden. An example of the default jpeg embedding template is shown in Figure 84.

```

```

Use \${url} and \${title} as placeholders for their final value. For example:  


**Figure 84 Embedding template section (jpeg)**

## Text Extractors section

The **Text Extractors** section provides a list of available text extractors to index attachments that are included in searches. An example of the **text/html** Text extractor section is shown in Figure 85.

Text extractors	
Enabled	Extractor
<input checked="" type="checkbox"/>	HTML text extractor
<input type="checkbox"/>	Plain text extractor

**Figure 85 Edit MIME type page for *text/html* MIME type—Text Extractors section**

The Text Extractors section elements include:

- **Enabled**—check to enable multiple extractors as required. Some types are enabled by default. For example, the *Plain Text Extractor* is enabled for *text/plain* type or *.txt* files.
- **Extractor**—lists the types of text extractors available for the selected MIME type.

## OAI identifier

The OAI identifier page enables the editing of identifier attributes.

OAI (Open Archives Initiative) identifiers are persistent URN (Uniform Resource Name) identifiers, ensuring that OAI items can be uniquely identified.

To access the identifier the **/p/oai?verb=Identify** must be appended to the EQUELLA institution URL. (*Note: The /oai endpoint is available for backwards compatibility.*)

For example, the following URL:

'<http://equella.myinstitution.edu>' would become  
'<http://equella.myinstitution.edu/p/oai?verb=Identify>'

An example identifier is shown in Figure 86.

```

<?xml version="1.0" encoding="UTF-8"?>
- <oai:PMH xmlns="http://www.openarchives.org/OAI/2.0/" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://www.openarchives.org/OAI/2.0/ http://www.openarchives.org/OAI/2.0/OAI-PMH.xsd">
  <responseDate>2009-07-01T05:30:49Z</responseDate>
  <request verb="Identify" href="http://beta40.equella.com/documentation/p/oai"></request>
- <Identify>
  <repositoryName>EQUELLA</repositoryName>
  <baseURL>http://beta40.equella.com/documentation/p/oai</baseURL>
  <protocolVersion>2.0</protocolVersion>
  <adminEmail>documentation@equella.com</adminEmail>
  <earliestDatestamp>1998-01-01T00:00:00Z</earliestDatestamp>
  <deletedRecord>transient</deletedRecord>
  <granularity>YYYY-MM-DDTh:mm:ssZ</granularity>
  <compression>gzip</compression>
  <compression>deflate</compression>
- <description>
  - <toolkit xmlns:schemaLocation="http://oai.dlib.vt.edu/OAI/metadata/toolkit http://alcheme.oclc.org/oaiCat/toolkit.xsd"
    xmlns="http://oai.dlib.vt.edu/OAI/metadata/toolkit">
    <title>OCLC's OAIcat Repository Framework</title>
    - <author>
      <name>Jeffrey A. Young</name>
      <email>jyoung@oclc.org</email>
      <institution>OCLC</institution>
    </author>
    <version>1.5.57</version>
    <toolkitIcon>http://alcheme.oclc.org/oaiCat/oaiCat_icon.gif</toolkitIcon>
    <URL>http://www.oclc.org/research/software/oai/cat.shtml</URL>
  </toolkit>
- <description>
  - <oai:Identifier xmlns:schemaLocation="http://www.openarchives.org/OAI/2.0/oai-identifier http://www.openarchives.org/OAI/2.0/oai-identifier.xsd"
    xmlns="http://www.openarchives.org/OAI/2.0/oai-identifier" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    <schema>oai</schema>
    <repositoryIdentifier>http://equella.myinstitution.edu</repositoryIdentifier>
    <delimiter></delimiter>
    <sampleIdentifier>oai:http://equella.myinstitution.edu:ABCDEF/1</sampleIdentifier>
  </oai:Identifier>
</description>
</Identify>
</OAI-PMH>

```

**Figure 86 Sample identifier**

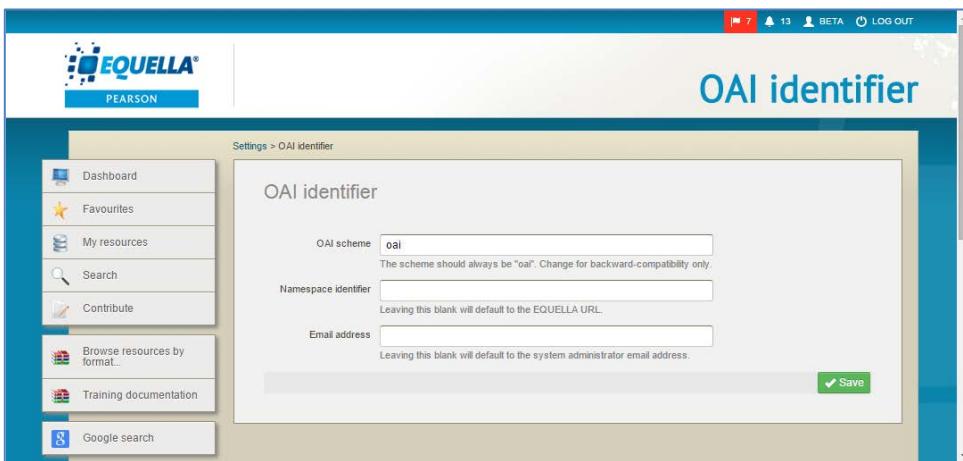
Further information for OAI Identifiers is provided at

<http://webservices.itcs.umich.edu/mediawiki/oaibp/index.php/OAIIdentifiersAndRegistrationSection> and <http://www.openarchives.org/OAI/2.0/guidelines-oai-identifier.htm>.

## Configure OAI Identifier settings

To configure OAI identifier settings

1. Select the **OAI identifier** link from the Settings page. The **OAI identifier** page displays, as shown in Figure 87.



**Figure 87 OAI identifier page**

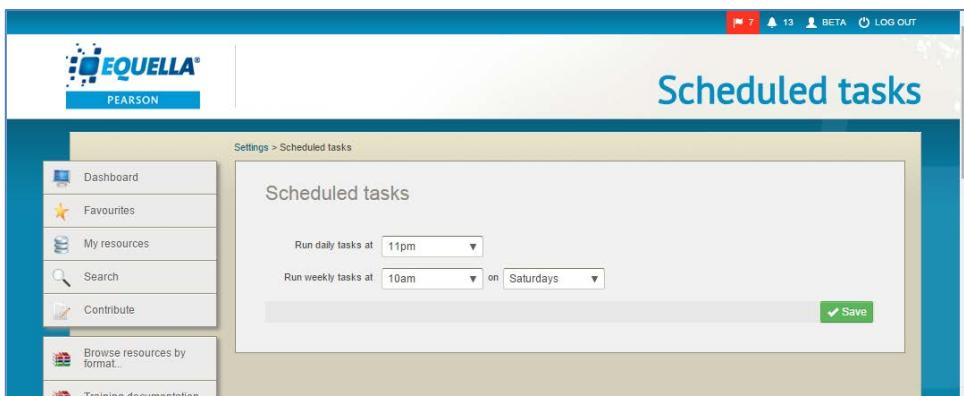
2. Enter or edit the **OAI scheme** when required for backward-compatibility.
3. Enter the **Namespace identifier**. Typically a domain name is used as these are unique. If no value is entered the default value will be the institution's URL.
4. Enter the **Email address** for the user responsible for managing OAI compatibility. If no value is entered the default value will be the System Administrator's email.
5. Click **Save**.

## Scheduled tasks

**Scheduled tasks** configures the start times for daily and weekly tasks. Daily tasks could include such items as checking for overdue moderation tasks, escalation of moderation tasks, notification creation for resources requiring review and new available resources, and harvester profiles. Weekly tasks could include such items as removing deleted items, checking URLs, checking for deleted users and Blackboard connector synchronisation.

To configure Scheduled tasks

1. Select the **Scheduled tasks** link from the Settings page. The **Scheduled tasks** page displays, as shown in Figure 88.



**Figure 88 Scheduled tasks page**

2. From the **Run daily tasks at** drop-down, select the required time.
3. From the **Run weekly tasks at** drop-down, select the required time, then from the **on** drop-down, select the required day of the week.
4. Click **✓ Save**.

## Searching and content indexing

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

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

### To access Searching and content indexing settings

Select **Settings** from the navigation menu. The **Settings** page displays.

1. Select the **Searching and content indexing** link to display the **Searching and content indexing** page, as shown in Figure 89.

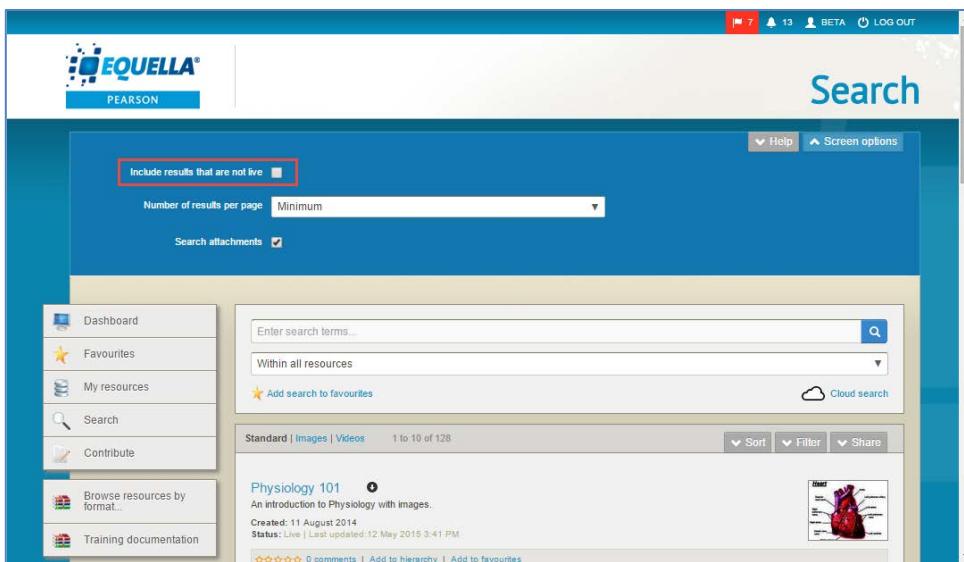
The screenshot shows the EQUELLA administration interface with the title 'Searching and content indexing'. The left sidebar contains navigation links such as Dashboard, Favourites, My resources, Search, Contribute, Browse resources by format, Training documentation, Google search, Manage tasks, Manage external resources, Manage resources, Manage activations, Reports, and Settings. The main content area is divided into several sections: 'Searching' (Default results order set to Relevance, Allow non-live results checked), 'Searching terms boost' (Title, Other metadata, Attachment content sliders), 'Content indexing' (radio buttons for Web page indexing: Do not index attached web pages, Index the linked web page only, Index the linked web page and any secondary linked web pages), 'Cloud' (Disable cloud searching checkbox), 'Gallery views' (Disable Images, Disable Videos, Disable file count checkboxes), 'Search filters' (Search filters dropdown showing 'Images', with 'Edit | Remove' and 'Add a new search filter' buttons). A 'Save' button is located at the bottom right.

Figure 89 Searching and content indexing page

## Searching options

To configure Searching options

1. From the **Default results order** drop-down list, select the required default order resources will display on search results pages (*Relevance, Date last modified, Title or User rating*).
2. Select the **Allow non-live results** checkbox to show the '*Include results that are not live*' checkbox in the Search page *Screen options*. An example is shown in Figure 90.



**Figure 90** Search page screen options

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

## Searching terms boost

When the results sort order is set to *Relevance*, and search terms are entered, the results display a relevance score. (See the *EQUELLA Searching User Guide* for further information.)

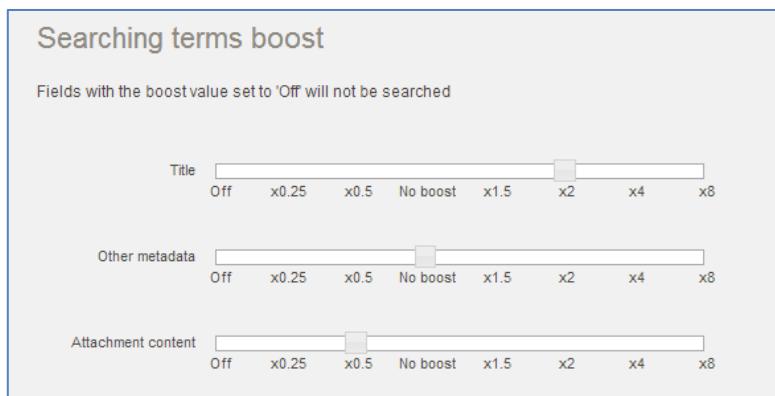
When calculating the relevance score in EQUELLA versions prior to 6.2, the item title was worth 1.5 times as much as content found anywhere else (metadata plus attachments). Attachment content and metadata were grouped into the same field and were worth the same.

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

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

### To configure Searching terms boost

1. Drag the boost variables to the required values. An example is shown in Figure 91.



**Figure 91 Searching terms boost**

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

2. Click Save.

## Content indexing options

To configure Content indexing options

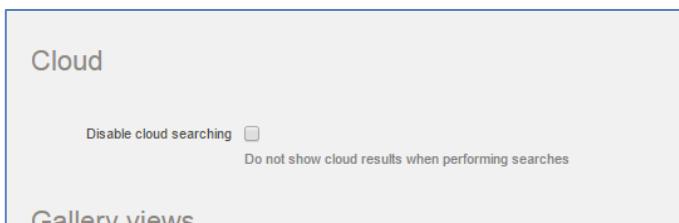
1. Select the required option from:
  - **Do not index attached web pages**—select this option if it is not required for searches to return matching results on linked web pages.
  - **Index the linked web page only**—select this option to index the web page of the linked URL, but no further linked web page levels. This means that searches will return matching results from the web page content.
  - **Index the linked web page and any secondary linked web pages**—select this option to index the page of the linked URL and the next level of web pages (limit 0.5 Mb). This means that searches will return matching results from each level of web pages.

2. Click Save.

## Cloud

To disable/enable Cloud searching

1. Select the **Disable cloud searching** checkbox in the **Cloud** section. An example is shown in Figure 92.



**Figure 92 Cloud option**

2. Click Save.

## Gallery views

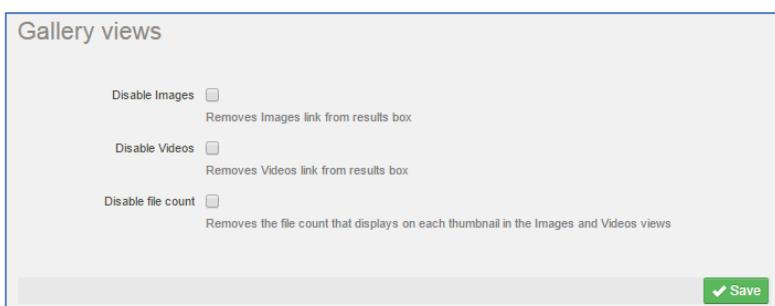
In some cases, administrators may wish to disable the Images and/or Videos views on EQUELLA results pages. This will remove the **Images** and/or **Videos** links at the top left of the results box. Thumbnails for image and video files will still be created in the background, so if the views are enabled,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

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

### To configure Gallery views options

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

An example is shown in Figure 93.



**Figure 93 Gallery views options**

2. Click Save.

## Search filters

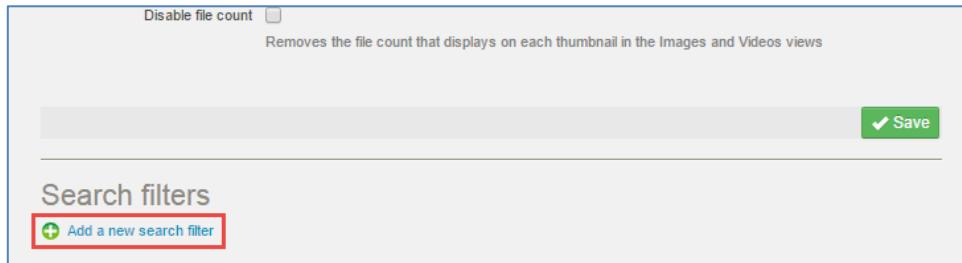
Adding one or more search filters adds those filters to the filter box on resource results screens. This allows the user more filtering options for their search results, enabling easier discovery of resources.

Search filters are based on MIME types. For example, a filter might be required to show only resources that have image attachments. An example is shown in Figure 94.

**Figure 94 Filter box with added search filter**

### To add a Search filter

1. Click the **Add a new search filter** link. An example is shown in Figure 95.



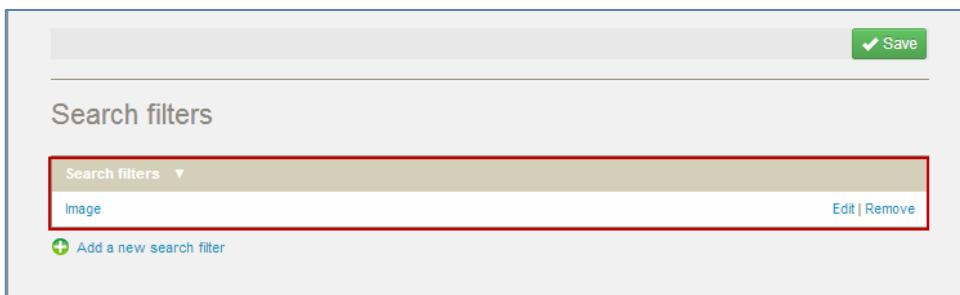
**Figure 95 Add a new search filter link**

The **Create new search filter** page displays. An example is shown in Figure 96.

The screenshot shows the 'Create new search filter' form. It has a field labeled 'Name' with the value 'Image'. Below it is a list of 'MIME Types' with several options checked, including 'Image (image/bmp)', 'Image (image/gif)', 'Image (image/jpg)', 'Image (image/png)', and 'Scalable Vector Graphics (image/svg+xml)'. A note at the bottom says '\* indicates mandatory fields'. At the bottom right are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box.

**Figure 96 Create new search filter**

2. Enter a name for the filter in the **Name** field (e.g. *Image*).
3. Select the MIME Types required (e.g. Image (image/gif, image/bmp etc.)).
4. Click **Save**. The Search setting page displays with the new filter listed. An example is shown in Figure 97.



**Figure 97 Search settings with Search filter added**

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

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

The search filter displays at the bottom of the filter tab on resource results screens under the heading of **Filter by resource type**. An example is shown in Figure 98.



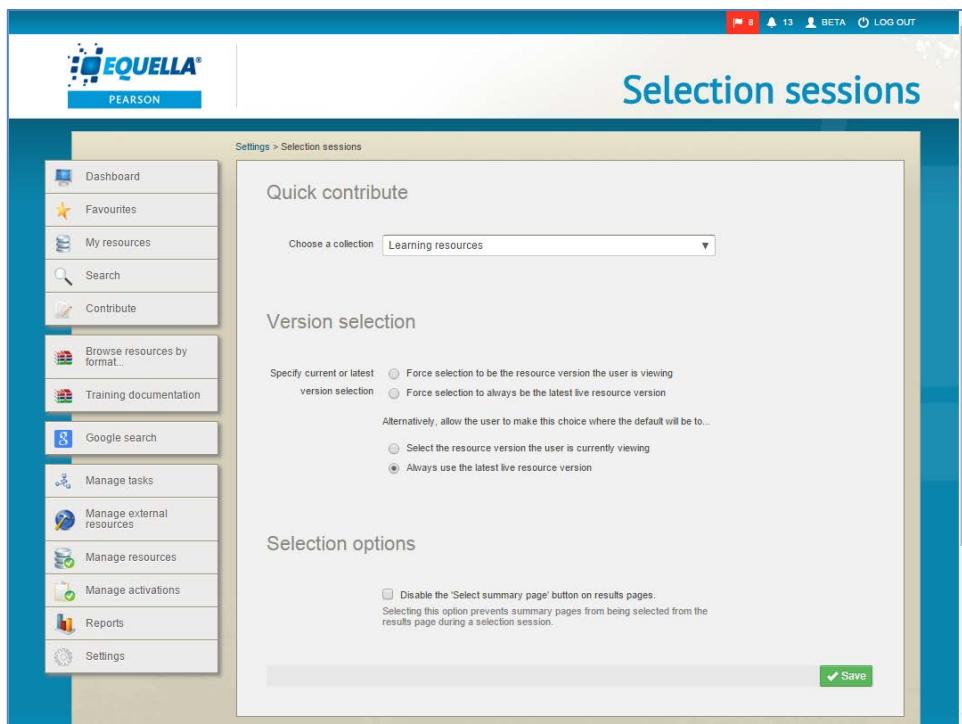
**Figure 98 Filter tab with added search filter**

## Selection sessions

The Selection sessions page provides the Quick Contribute setting, as well as version defaults for resource version selection.

### To configure Selection sessions

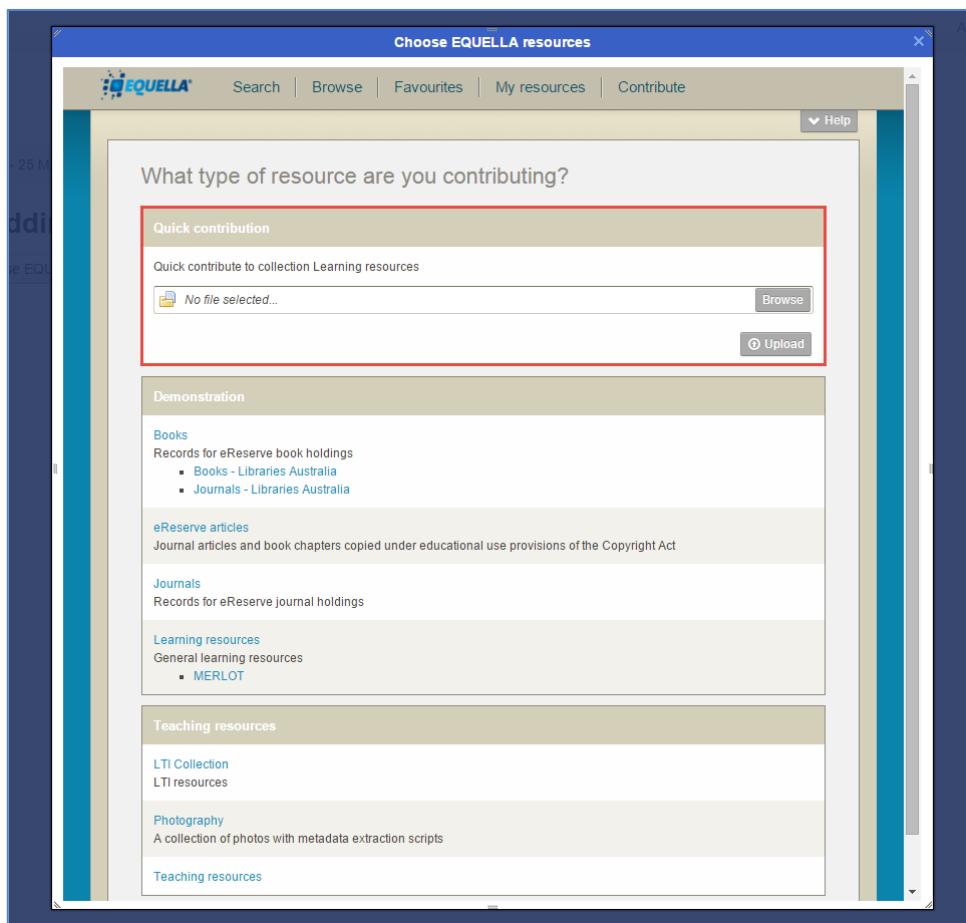
1. Select the **Selection sessions** link from the Settings page. The **Selection sessions** page displays, as shown in Figure 99.



**Figure 99 Selection settings page**

## Quick Contribute

In integrated third-party systems such as Blackboard™ and Moodle™, the Integration screen **Contribute** page enables a **Quick Contribute** control. An example is shown in Figure 100.



**Figure 100 EQUELLA Integration screen - Contribute page - Quick Contribute feature**

Users can navigate to and select a file that is automatically contributed as an EQUELLA resource into the chosen EQUELLA collection and added to the integration's course list.

The Quick Contribute control prevents duplicate files being uploaded into EQUELLA.

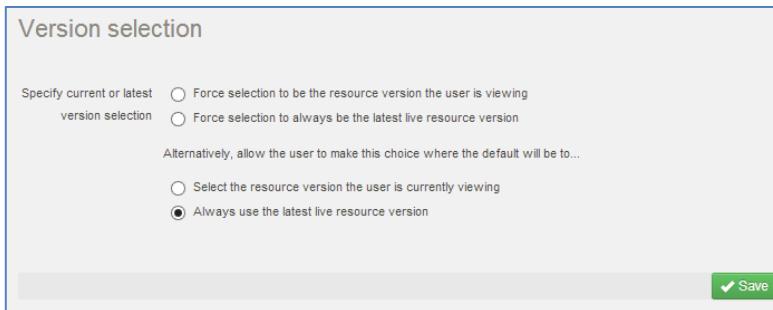
#### To select a collection for Quick Contribute

1. Select a collection from the **Choose a collection** drop-down list.
2. Click **✓ Save**.

#### Version selection

The **Version selection** section of the Selection sessions page provides institution-wide settings for resource version selection. Course specific version selections can be managed using the Administration Console Courses tool.

Version selection configuration is used to determine which version of a resource is displayed when a resource link is selected. Figure 101 shows the **Version selection** section.



**Figure 101 Version Selection section**

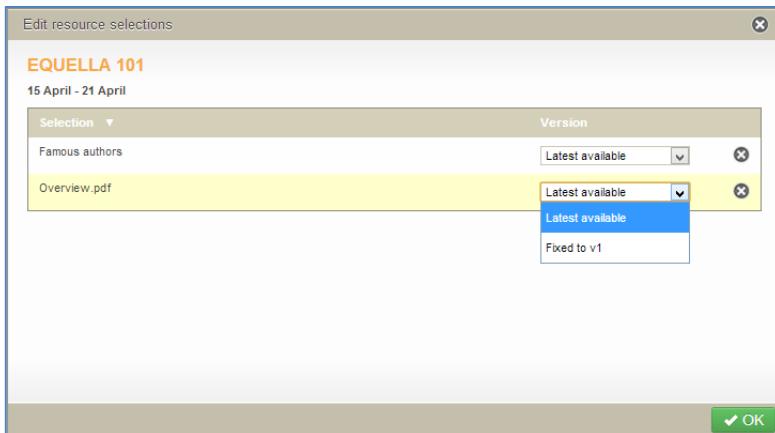
Selecting the *latest live version* options displays the latest version of the resource when the link is selected even if the saved link is for an older version; otherwise the version associated with the link is displayed.

The options that allow a user to choose the version are enabled when adding an EQUELLA Resource to an item during contribution and when EQUELLA is integrated with a third party application such as Blackboard, Moodle or Canvas. An example is shown in Figure 102.

## To configure version selection

1. Select one of the following:

- **Force selection to be the resource version the user is viewing**—(default option) displays the originally linked resource.
- **Force selection to always be the latest live resource version**—displays the latest version of the originally linked resource.
- **Select the resource version the user is currently viewing**—allows the user to choose between the selected resource version and the latest version of that resource during contribution when selecting existing EQUELLA resources as attachments. When this option is selected, a drop-down list displays on the My selections page and the user selects the required option. *Fixed to v(x)* is shown as the default when this option is selected. An example is shown in Figure 102.
- **Always use the latest live resource version**—allows the user to choose between the originally linked resource and the latest version of that resource during contribution when selecting existing EQUELLA resources as attachments. When this option is selected, a drop-down list displays on the My selections page and the user selects the required option. *Latest available* is shown as the default when this option is selected. An example is shown in Figure 102.



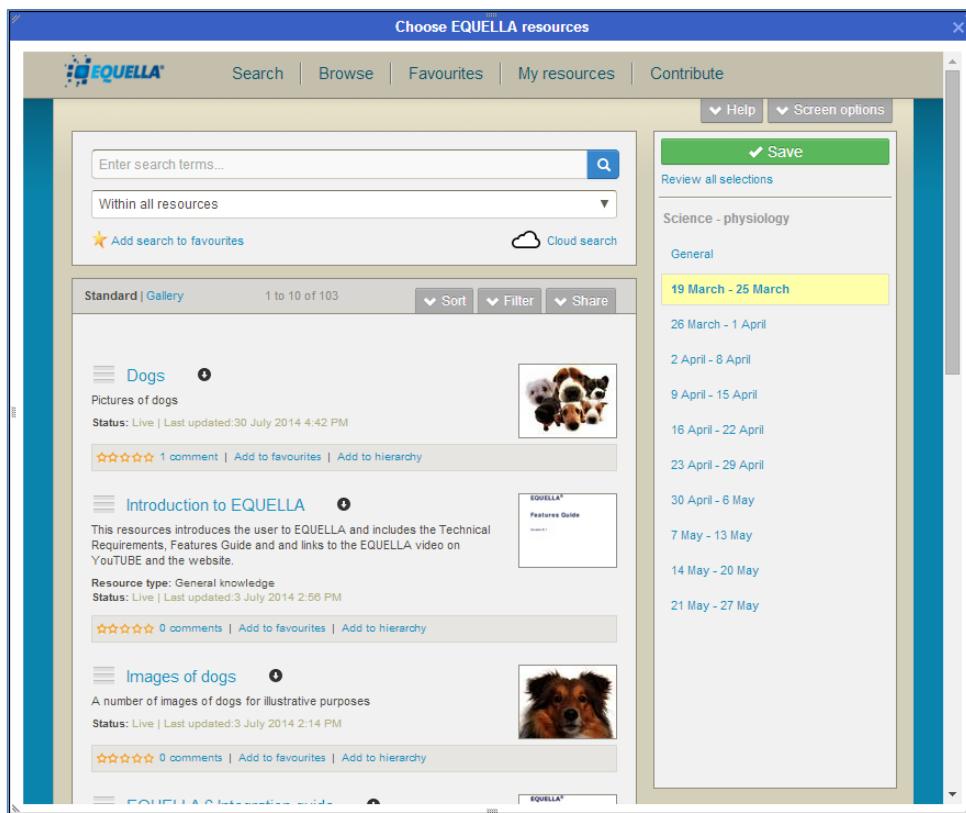
**Figure 102 EQUELLA Resources My selections version drop-down**

## Selection options

Select the **Disable the 'Select summary page' button on results pages** checkbox to stop the **+ Select summary page** button from displaying on the EQUELLA integration screen results pages. This prevents users from accidentally adding the summary page links whilst thinking they're adding attachment links.

An example with the **+ Select summary page** button enabled is shown in Figure 103 and with the button disabled in Figure 104.

**Figure 103 Integration screen Search results page with 'Select summary page' button enabled**



**Figure 104 Integration screen Search results page with 'Select summary page' button disabled**

## Shortcut URLs

The Shortcut URLs page associates a text alias with a URL to create a shortcut for entering the URL.

### To configure Shortcut URLs

1. Select the **Shortcut URLs** link from the Settings page. The **Shortcut URLs** page displays with any current shortcut URLs listed. An example is shown in Figure 105.

**Figure 105 Shortcut URLs page**

Shortcuts can be used by appending `/s/shortcutname` to the institution shortname in the institution URL. For example, an institution URL of '<http://equella.myinstitution.edu/doco>' would become '<http://equella.myinstitution.edu/doco/s/Support>' when using the shortcut shown in Figure 106.

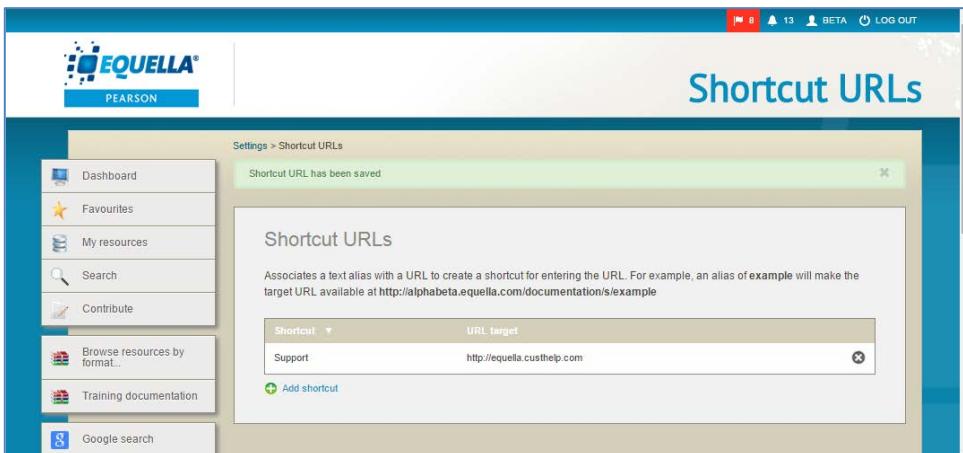
## To create a shortcut

1. Click the **Add shortcut** link to open the **Add shortcut URL** dialog. An example is shown in Figure 106.



**Figure 106 Add shortcut URL dialog**

2. Enter the **Shortcut** name (e.g. *Support*) and **URL target** (e.g. <http://equella.custhelp.com>) in the relevant fields.
3. Click **✓ OK** to add the shortcut to the shortcut list. An example is shown in Figure 107.



**Figure 107 Shortcut URLs list**

## To remove a Shortcut URL

1. Click **✗** beside the Shortcut URL to be removed.

## User scripts

The User scripts setting allows users to create and save FreeMarker and JavaScript scripts that can be run from various areas of EQUILLA.

Saved FreeMarker scripts can be accessed from *Scripted portlets*.

Saved Javascripts can be accessed from the *Manage resources, Execute script* function.

## To add a User script

1. Select the **User scripts** link from the Settings page. The **User scripts** page displays with any existing user scripts listed. An example is shown in Figure 108.

The screenshot shows the EQUILLA interface with the Pearson logo at the top. The main title is "User scripts". On the left, there's a sidebar with various links like Dashboard, Favourites, My resources, Search, Contribute, etc. The main content area shows a table titled "User scripts" with columns: Script, Module name, and Script type. There are five entries:

Script	Module name	Script type
Example bulk executable script		Executable
Module use example	Example	Executable
Scripting shortcuts		Display
Seasonal portlet		Display
Set item name	itemName	Executable

A blue "Create new script" button is located at the bottom left of the table area.

**Figure 108** User scripts page

2. Click the **Create new script** link to display the **Create new script** page. An example is shown in Figure 109.

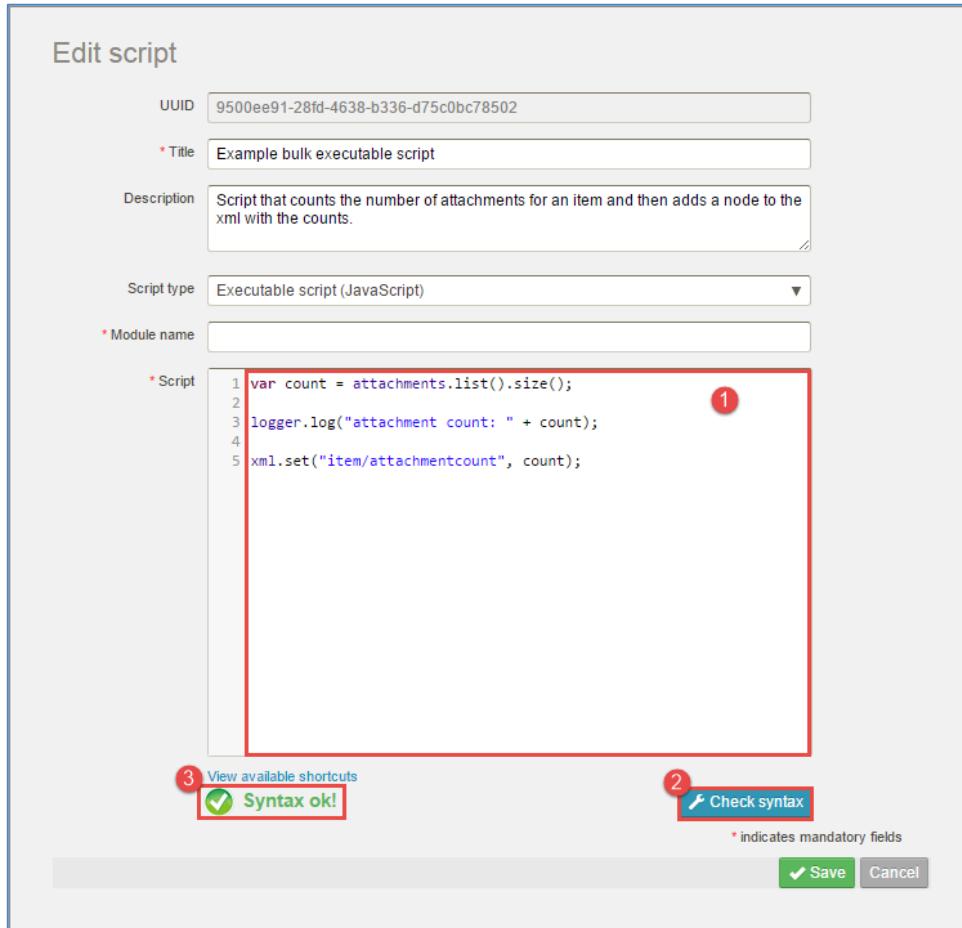
The screenshot shows the EQUILLA interface with the Pearson logo at the top. The main title is "Create new script". On the left, there's a sidebar with various links like Dashboard, Favourites, My resources, Search, Contribute, etc. The main content area shows a form titled "Create new script" with fields for UUID (auto-filled), Title (empty), Description (empty), Script type (set to "Display script (FreeMarker)"), and a large "Script" text area containing "1". At the bottom, there are "Save" and "Cancel" buttons.

**Figure 109** Create new script page

3. Enter a **Title** and **Description** (optional).
4. Select the **Script type** from the drop-down. Options are **Display script (FreeMarker)** or **Executable script (JavaScript)**.

5. Enter the **Script** body. Hover the mouse over the **View available shortcuts** link to see a list of scripting shortcuts.

For JavaScript scripts, click the  **Check syntax** button. A  **Syntax ok!** message should display. An example is shown in Figure 110.



**Figure 110 Example of a JavaScript script**

*NOTE: If an error occurs, check the JavaScript script syntax for errors then check the syntax again.*

6. Click .

## Running user scripts

Saved FreeMarker scripts can be accessed from the  drop-down on the *Create a new Scripted portlet* page. An example is shown in Figure 111.

Create a new Scripted portlet

\* Title

Disabled

Show for other users   
This will enable extra options allowing you to show this portlet to other users

Freemaker / HTML  Server-side script  Client-side on-ready script

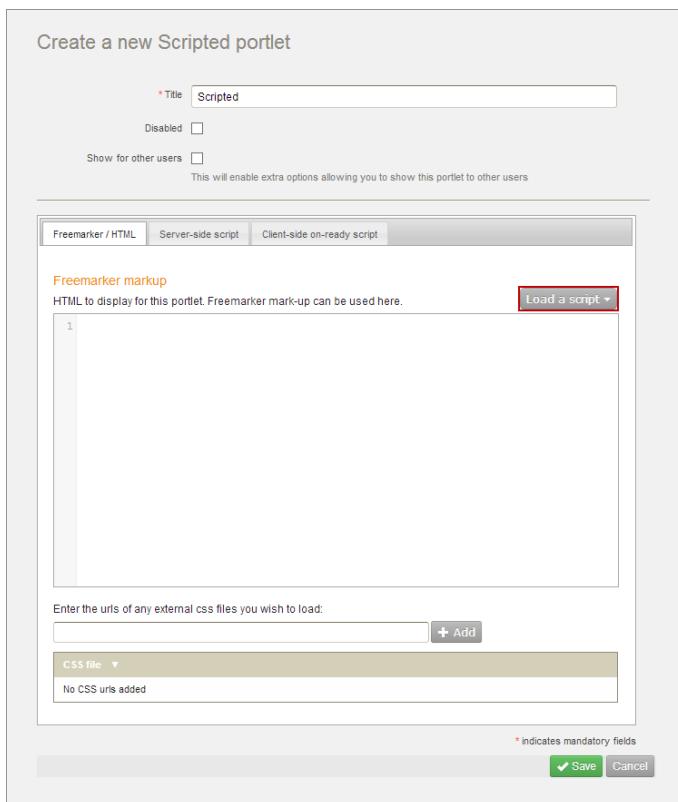
**Freemarker markup**  
HTML to display for this portlet. Freemarker mark-up can be used here. [Load a script](#)

Enter the urls of any external css files you wish to load:  [+ Add](#)

**CSS file** [▼](#)  
No CSS urls added

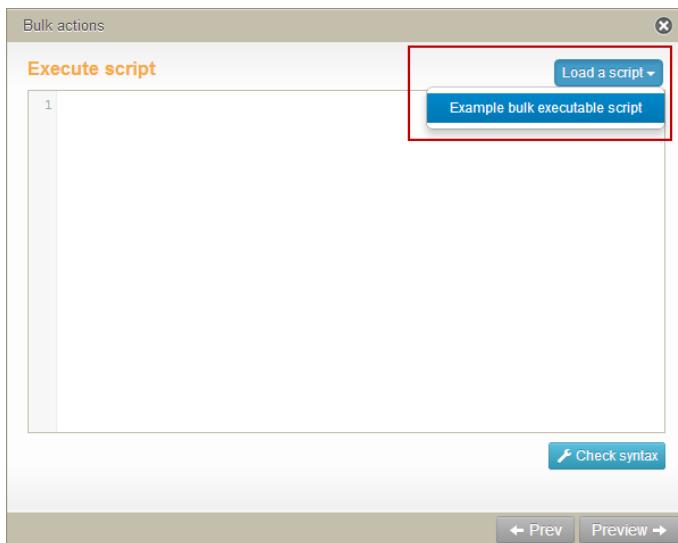
\* indicates mandatory fields

[Save](#) [Cancel](#)



**Figure 111 Load a script drop-down on Scripted portlet page**

Saved JavaScript scripts can be accessed and run from the *Execute script* bulk action accessed through the Manage resources function. An example is shown in Figure 112.



**Figure 112 Load a script drop-down on Execute script dialog**

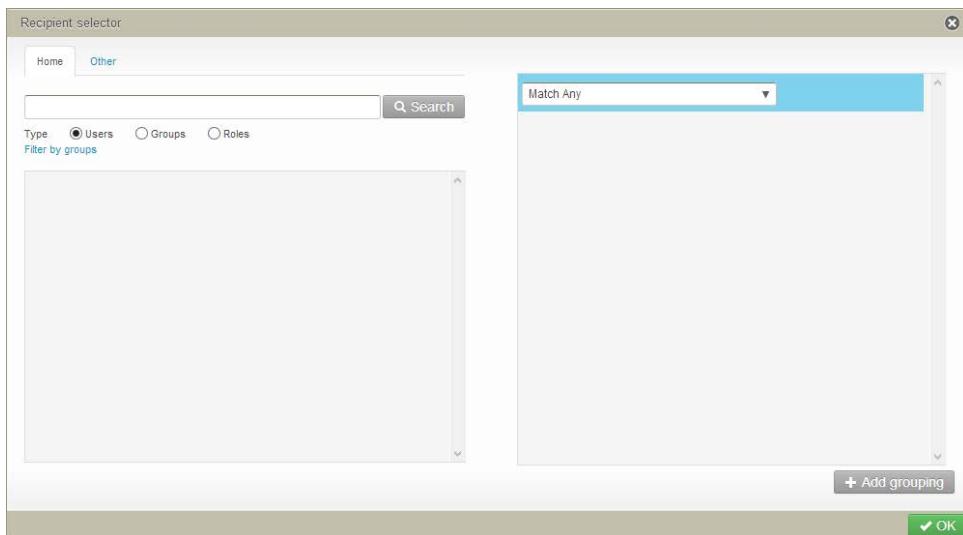
## Recipient selector

The Recipient selector enables users to select users, groups and/or roles that can have access to areas in EQUELLA. It is used in the following functions:

- **Approvals and payments** – select the users, groups and/or roles that are part of an approval or payment rule for EQUELLA instances set up with the EQUELLA Content Exchange Store Front capability. See the *EQUELLA Store Front Guide* for further information.
- **Content quotas** – select the users, groups and/or roles to which a content quota applies (see [Content restrictions and quotas](#) on page 24 for further information).
- **Custom links** – select the users, groups and/or roles that can view a custom link (see [Custom links](#) on page 28 for further information).
- **Create portlets** – select the users, groups and/or roles that can view a portlet (see [Add portlets](#) on page 31 for further information).

## Recipient selector elements

The Recipient selector is made up of the *Home* and *Other* tabs, and the *User entity pane*. An example of the **Recipient selector** dialog is shown in Figure 113.



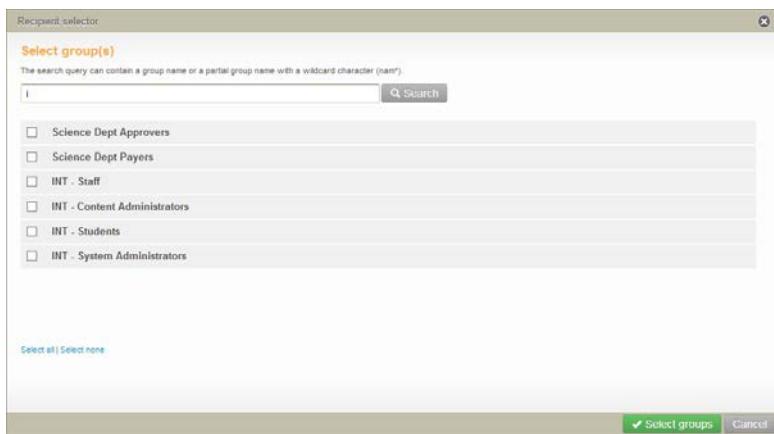
**Figure 113 Recipient selector dialog**

### Home tab

The **Home** tab searches the selected user entity (Users, Groups or Roles) for the text entered in the search criteria.

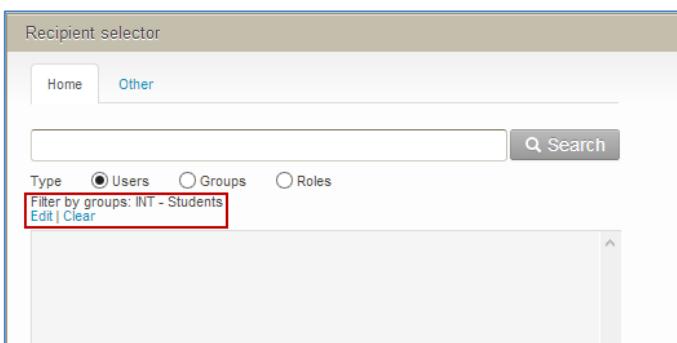
#### To search for Users, Groups or Roles

1. Select **Users, Groups or Roles** using the radio button.
2. If selecting *Users* or *Groups*, a group filter may be added by clicking the **Filter by groups** link. A **Select group(s)** dialog displays. An example is shown in Figure 114.



**Figure 114 Add group filter - Select group(s) dialog**

3. Enter a search query (at least one letter or digit), then click
4. Select the groups that the user or group search will be restricted to, the click . The group filter displays, and applies to any searches based on users or groups, until the filter is cleared or the Recipient selector closed. An example is shown in Figure 115.

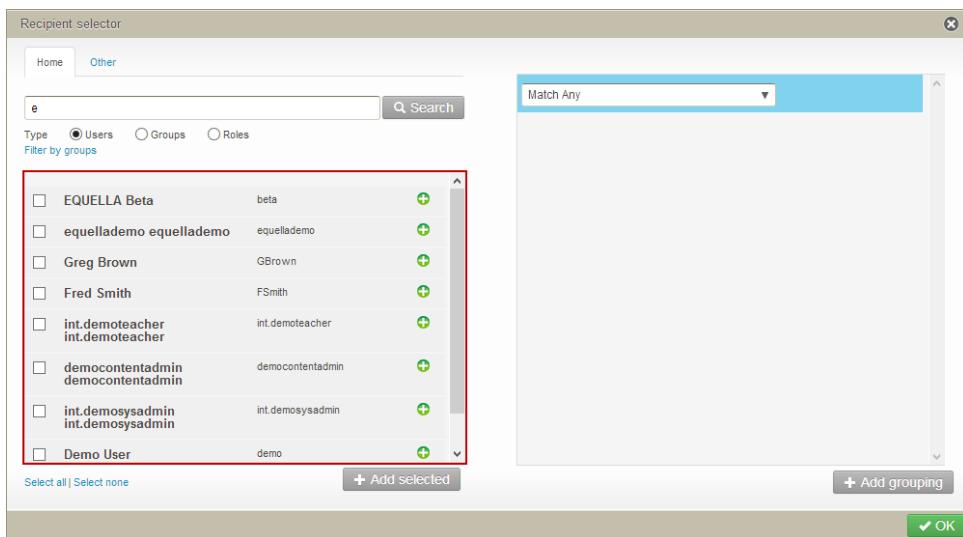


**Figure 115 Group filter**

- Click the **Edit** link to edit the group filter.
  - Click the **Clear** link to remove the filter.
5. Enter a search query in the search text box then click .

*NOTE: At least one letter or digit must be included in the search query. Partial names can be entered without the use of a wildcard.*

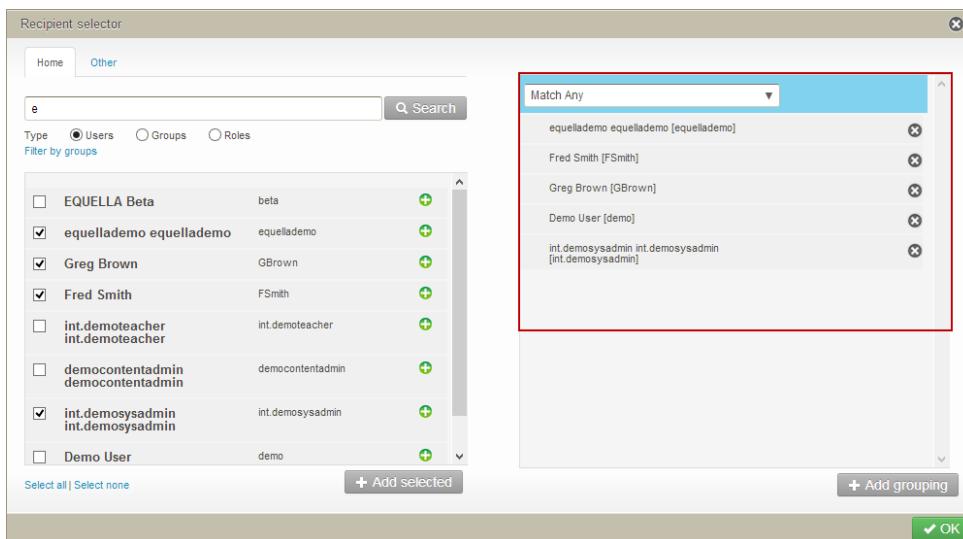
The results display in the results panel. An example with *users* is shown in Figure 116.



**Figure 116 Recipient selector - Search results panel**

### To select results

1. To select single results, click , or to select multiple results, select the checkboxes beside the required results, then click **+ Add selected**. The selections display in the *User entity pane*. An example is shown in Figure 117.

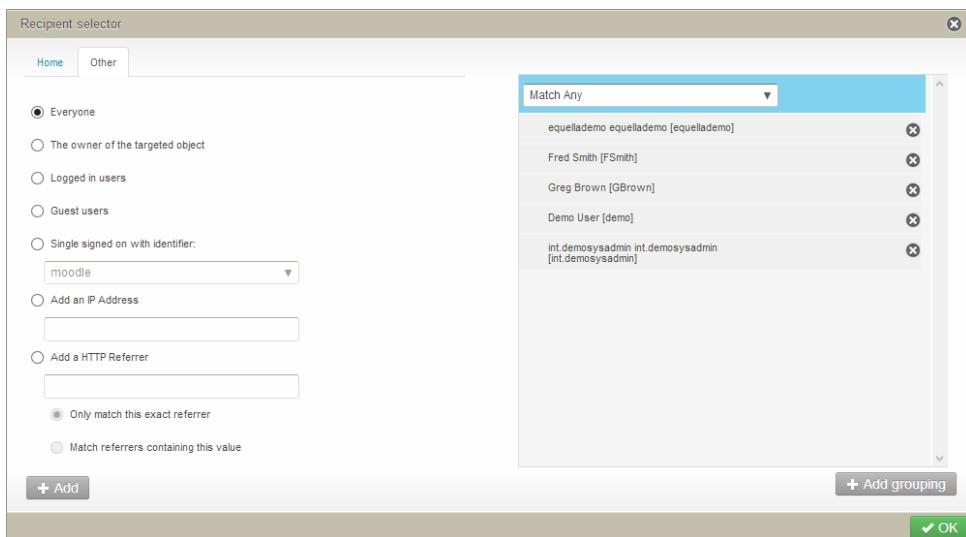


**Figure 117 Results selected added to User entity pane**

- Selections can be removed from the User entity pane by clicking .
  - Selected results can be cleared in the Results pane by clicking the **Select none** link.
  - All results can be selected by clicking the **Select all** link.
2. Click **✓ OK** to save.

### Other tab

The **Other** tab provides alternative options for selecting users. An example of the **Other** tab is shown in Figure 118.



**Figure 118 Recipient selector - Other tab**

The **Other** tab entities represent groupings that cannot be easily specified using the Home tab. The options are:

### Everyone

Represents everyone who can access this instance of EQUELLA. This group includes everyone who can access an EQUELLA URL and includes *Guest* and *Logged in* users.

### The owner of the targeted object

Represents object owners, typically object creators.

### Logged in users

Represents users who are logged in to this instance of EQUELLA.

### Guest users

Represents users who can access the EQUELLA URL without logging in.

### Single signed on with identifier:

Represents users who are logged on using the Shared Secrets plug-in. This option is mainly for use with third-party integrations.

### Add an IP Address

Enter an IP address in standard 255.255.255.255 format and a subnet mask in CIDR notation, a number between 0–32. The subnet mask represents the number of bits masked from the starting bit of the IP address.

### Add a HTTP Referrer

Enter a text string that will be matched to the URL of the recipient. For example, <http://institution.edu.au/equella/>.

- **Only match this exact referrer**—the recipient URL must match the entered referrer URL exactly.

- **Match referrers containing this value**—the recipient URL must contain the entered referrer text string. The entered text string does not need to be a resolvable URL.

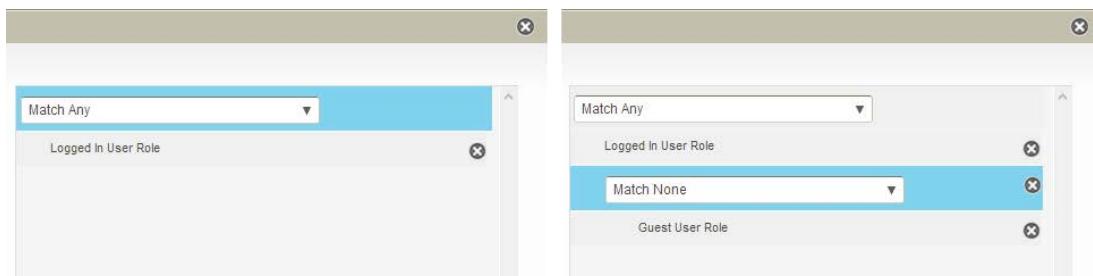
## To add an Other tab element to the User entity pane

1. Select the required element (e.g. *Logged in users*).
2. Click **+ Add**.
3. Click **✓ OK** to save.

## Create advanced user entity lists

User entity lists are expressions whose evaluation for the current user determines access to objects. The user entity list consists of user and groupings (expression operators) that can be combined to create an expression of arbitrary complexity. User entity lists can be created by identifying a user or users to be matched using the default **Match Any** grouping but occasionally a more sophisticated list is required. Important considerations when creating user entity expressions are:

- Readability—use the most readable expression. This makes maintenance by other users easier as the intent of the expression is clearly stated.
- Simplicity—use the simplest possible expression to achieve the required user access. Figure 119 shows the same access configuration expressed in two ways, with the first (simple) expression being preferable.



**Figure 119 Equivalent expressions**

The available groupings are:

- **Match Any**—equivalent to the Boolean OR operator. When used at the top level of a user expression, a user belonging to any one of the user entities in this group can use the associated privilege.
- **Match None**—equivalent to the Boolean NOT operator. When used at the top level of a user expression, a user belonging to any one of the user entities in this group cannot use the associated privilege.
- **Match All**—equivalent to the Boolean AND operator. When used at the top level of a user expression, a user must belong to all the user entities in this group to use the associated privilege.

## Add Grouping button

Click **+ Add grouping** to add a new user entity grouping with the default **Match Any** operator.

## 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>.