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# **EQUELLA Features Guide**

Version 6.5



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## **EQUELLA 6.5 features overview**

This guide provides an overview of the features released in EQUELLA 6.5.

General features include:

- Manage resources filters new filters to display items with no owner and items with bad URLs.
- File attachment control change implementation of an enhanced User Interface for the upload of files during contribution. Users can now drag and drop or upload files straight from the wizard page rather than going through another series of pages to achieve the same result.

EQUELLA 6.5 also focuses on the enhancement of the **Workflow** module, and includes both improvements to current features and new features, as follows:

- Moderation page redesigned User Interface for better process flow and improved viewing of comments.
- My tasks page additional sorting options, enhanced results display to sort tasks based on assignment and priority relevance, the ability to select multiple tasks and approve or reject the selection in one action (based on permissions). Additionally, the ability to make a selection then sequentially process the task in the selection without returning to the My tasks page in-between.
- **Manage tasks page** additional filtering options, the ability to select multiple tasks and approve or reject the selection in one action or assign selected tasks to a specific moderator.
- Manage resources workflow bulk actions new actions to remove a selection of items from a workflow and move a selection of items from one workflow task to another task within the same workflow.
- Workflow attachments The ability to attach files only relevant to the workflow during moderation, which are then saved and can be viewed as part of the workflow process.
- Script task a new type of workflow task where a script can be added as a task that is run automatically once the preceding task is approved, and the item moved to the next task in the workflow once the script has run.
- Notification templates enhanced notification templates with meaningful subject titles and body text.
- Notification options the ability for users to configure which workflows from which they would like notifications. Additionally, contributors can choose if they would like to be notified when their items become 'live'.
- Moderation page User Interface changes overhaul of the moderation page so workflow information is more clearly displayed, and Approve and Reject buttons appear in a more logical order.



## **General enhancements**

## Uploading files from the wizard page

EQUELLA 6.5 enables users to upload files directly from the contribution wizard page for attachments controls with the attachment type of **Files** enabled. This substantially reduces the number of clicks required to upload a file.

Any contribution wizard with a current Attachments control which allows files to be uploaded will automatically display a file upload area on the wizard page after upgrading to EQUELLA 6.5.

Files can be dragged and dropped straight onto the wizard page. Alternatively, a click anywhere in the drag and drop box will open a file selection dialog.

An example of a contribution wizard page with a File attachment control is shown in Figure 1.

EC	QUELLA Supplementary Stude	
<b>* 3</b>	Contribute > Supplementary Student Resources  Details Name * Enter the name of the resource  Description * Enter a concise description	Save Save and continue   Cancel Cance
	Attachments and links Add attachments and links here No attached resources Add a resource Click to select files or drag and drop files here	

Figure 1 Contribution wizard page with Attachments control

## **Uploading files**

Files and packages (e.g. *SCORM packages, zip files*) can be uploaded then file display names and default viewers can be edited if required.

#### To upload files using from the contribution wizard page

1. From a contribution wizard page with an *Attachments control* that has the **Files** attachment type enabled either:



a. drag the required file/s and drop them within the outline of the drag and drop box. An example is shown in Figure 2.

No attached resources	
Add a resource	
	Click to select files

Figure 2 Files being dropped into drag and drop box

or,

b. click anywhere in the drag and drop box to open the selection dialog to navigate to and select the required files. An example is shown in Figure 3.

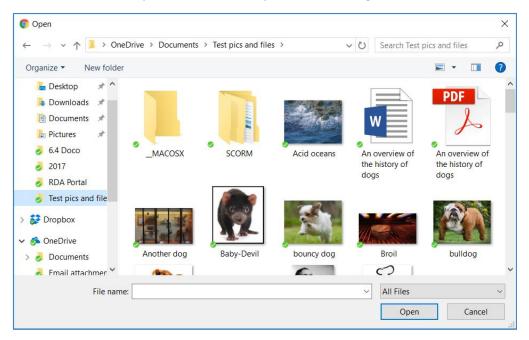


Figure 3 File selection dialog



The file/s upload and display above the drag and drop box. An example is shown in Figure 4.

Concerned dog.jpg		Edit   Replace   Dele
chilling dog.jpg		Edit   Replace   Dele
Add a resource		
	Click to select files or drag and drop files here	

#### Figure 4 Attachment control with uploaded files

Use the Edit link to change a file's display name or default viewer.

### **Zip file options**

Use the **Edit** link to unzip a zip file. An example is shown in Figure 5.

Upload files from your computer			⊗
Dogs.zip ————————————————————————————————————			
	Туре:	Archive	
• Display.name Dogs.zip	Filename:	Dogs.zip	
* indicates mandatory fields	Size:	154.79 KB	
Unzip files		Download this file	
		🗸 S	ave

#### Figure 5 Edit attachment - Unzip files button

Click the Unzip files button to see further display options. An example is shown in Figure 6.



Upload files from your computer	8
Edit attachment	
Display name     Dogs.zip     * indicates mandatory     Remove unzipped files     Show zip on	Type:     Archive       Filename:     Dogs.zip       Size:     154.79 KB
Select files to make visible	
Concerned dog.jpg	_
bouncy dog.jpg	
🔲 📓 bulldog.jpg	_
chilling dog.jpg	
Select all   Select none	
	✓ Save

#### Figure 6 Edit attachment - zip file display options

## **Manage resources filters**

Two new filters have been added to the *Manage resources* **Filter** tab to enable administrators to easily identify resources with no owners and those containing bad URLs. An example is shown in Figure 7.



Results	1 to 10 of 22	V Sort	▲ Filter	✓ Share
Filter by owner Select user Show items with no owner	r			
Filter by date modifie	ed			
After	•			
Filter by status				
All statuses	<b>v</b>			
Only show items in mode	ration			
Filter by bad URL Show items with bad URI	5			

Figure 7 Manage resources Filter tab



## **Workflow enhancements**

## **Moderation**

The **Moderation** page has been redesigned so that the processes flow in a more logical order for moderators, and to improve the ease of viewing workflow comments.

An example of the new Moderation page is shown in Figure 8.

	EQUELLA Teach	ing Resources
	Validate content Moderator to validate the content to make sure it is meaningful and relevant. Assigned to: Unassigned (assign to me) EQUELLA Documentation for moderation by EQUELLA Documentation, Sue Smith, Bob Carter (show all) 5 comments (post a comment)	< Prev 2 of 6 tasks Next >
	EQUELLA Documentation less than a minute age Formatting is still wrong - see attached university of oxford style guide.pdf	•
	Contribute > Teaching Resources	
*	Details Title * Enter the name of the resource	Edit resource     View summary     Approve
<b>M</b>	A history of cattle dogs Description *	😢 Reject
	Enter a concise description of the resource keeping in mind that this field is used when searching for items.  An broad overview of the history of cattle dogs COPYRIGHT APPROVED	Details
	File attachments	

Figure 8 Moderation page

## Workflow task details

The top area of the page displays the workflow task details, including the **Task name**, **Task description**, **Assignment** details, **Submitted by** details and task navigation tools. An example is shown in Figure 9.



Figure 9 Moderation page - Task details section



## **Comments**

Workflow **Comments** are now displayed in a separate scrollable area beneath the **X comments** label. Note that the scrollable comment area does not appear if there are no comments. An example is shown in Figure 10.

5 comments (post a comment)	
EQUELLA Documentation <u>13 minutes ago</u> Formatting is still wrong - see attached university of oxford style guide pdf	
2 EQUELLA Documentation <u>44 minutes ago</u>	-

#### Figure 10 Moderation page - Comments section

Rejection comments display with a pink background and approval comments display with a green background.

Click the **post a comment** link to open the **Post a comment** dialog to add new comment. An example is shown in Figure 11.

Post a comment	8
Enter a comment *	
	2
Attached files	
Click to select files or drag and drop files here	
<u>1</u>	1
Comment Cance	əl

Figure 11 Post a comment dialog

## Approve & Reject buttons

As many moderation tasks involve viewing and/or editing resources, the **Approve** and **Reject** buttons have been moved underneath the **Edit resource** and **View summary** buttons. An example is shown in Figure 12.



	Va	lidate content	< Prev	2 of 6 tasks	Next >
	Ass	erator to validate the content to make sure it is meaningful and relevant. igned to: Unassigned (assign to me) mitted by: EQUELLA Documentation for moderation by EQUELLA Documentation, Sue Smith, Bob Carter (show all)			
	5 c	omments (post a comment)			
		EQUELLA Documentation 21 minutes area Formatting is still wrong - see attached university of oxford style guide pdf			
		EQUELLA Documentation about an heur age			-
		Contribute > Teaching Resources			
<u>.</u>		Details	Edit res	ource	
$\star$		Title *	O View su	mmary	
100		Enter the name of the resource	Approve	9	
0		A history of cattle dogs	😢 Reject		
्		Description *			
		Enter a concise description of the resource keeping in mind that this field is used when searching for items.	Details		

Figure 12 Moderation page - Approve and Reject buttons

## Approving and rejecting tasks

When the **Approve** or **Reject** buttons are selected, the relevant dialog opens to complete the task action. Examples of the **Approve task** and **Reject task** dialogs are shown in Figure 13 and Figure 14.

Approve task	8
Approval message	
	,,
Attached files	
	1
Click to select files or drag and drop files here	
L	
Approve Canc	

Figure 13 Approve task dialog



Reject task	8
Rejection message *	
	11
Reject back to	
Original Contributor	▼
Attached files	
Click to select files or drag and drop files here	
✓ Reject Car	

Figure 14 Reject task dialog

## My tasks

**My tasks** lists any tasks that may be moderated by the logged in user. The **My tasks** page is accessed by selecting the **Tasks** icon at the top-right of any EQUELLA page.

A number of features and enhancements have been introduced to the **My tasks** page in EQUELLA 6.5.

## Default sort order

On opening the **My tasks** page, the tasks now display based on the **priority** set for the task (*High*, *Normal* or *Low*), **Assignee** (*Assigned to me, Unassigned then Assigned to other*) then **Moderating since** time.

Tasks display in the following order:

- Tasks where the priority is set to **High** AND assigned specifically to the logged in user.
- Tasks where the priority is set to **High** and unassigned.
- Tasks where the priority is set to **High** and assigned to another moderator.
- Tasks where the priority is set to **Normal** AND assigned specifically to the logged in user.
- Tasks where the priority is set to Normal and unassigned.
- Tasks where the priority is set to **Normal** and assigned to another moderator.
- Tasks where the priority is set to **Low** AND assigned specifically to the logged in user.
- Tasks where the priority is set to **Low** and unassigned.
- Tasks where the priority is set to **Low** and assigned to another moderator.

Tasks where the priority is set to **High** display with an <sup>1</sup> icon.



Tasks assigned specifically to the logged in user display with an An example of the **My tasks** page is shown in Figure 15.

		3 🜲 13 👤 DOCUMENTATION 🕐 LOG OUT
EQUELL	Å	My tasks
		✓ Screen options
Dashboard	Successfully approved previous task	Selection (0)
★ Favourites		You have selected 0 results
My resources	Enter search terms	<ul> <li>Select all results in this search</li> </ul>
C Search		O Perform an action
Contribute	Results 1 to 10 of 13 V Sort V Filter V Share	Moderate selected
Browse by format	Heart of Darkness - Joseph Conrad	
Browse by origin	An overview of the novel Status: Moderating Last updated. <u>18 days ago</u> Moderating since: 18 days ago	
😤 Manage tasks	Workflow: Teaching resources workflow Task: Editorial   Expires.in 2 days Time at this task: gloot a minute	
S Manage resources	Priority: High Assigned to: Me	
b Manage activations	Moderation progress + Select & Moderate	
L Reports	Joseph Conrad and his heart of darkness Photos and an essay on Joseph Conrad, the author of Heart of Darkness	
Settings	Status: Moderating Last updated 14 days ago Moderating since: 2 minutes ago Workflow: Tasching resources workflow Task: Stored Express 2 days Priority: Light resources an Annuale Assigned to: Unassigned Moderation progress + Select & Moderate	
	Law and Ethics         An overview of the subject of common law and ethics COPYRIGHT APPROVED         Status: Moderating Last updated 28 days age         Moderating mere about a mouth age         Workflow: Tracking mesuruses workflow         Task: Control PDF Lepined 11 days age         Task: Control PDF Lepined 11 days age         Moderating notation         Moderating notation         Moderation progress	

Figure 15 My tasks page - default sort order

## Sort options

In addition to the existing sort options of *Priority (default), Expiry date, Time waiting in task* and *Title,* **Assignee** and **Workflow** have been added.

- Assignee sorts the results based on who has been assigned to the task (*Me*, *Unassigned* then *Assigned to other*).
- Workflow if there are tasks from multiple workflows, sorts results in Workflow order (alphabetical).

An example of the My Tasks page Sort options is shown in Figure 16.



	My tasks
Enter search terms	✓ Screen options      Selection (0)      You have selected 0 results     ► Select all results in this search
Results     1 to 10 of 14     Sort     Filter     Share       Sort results by     Title     A     2       Priority     Expiry date     2	Perform an action     Moderate selected
Assignee Time waiting in task Uvorkflow story of cattle dogs Title ated:13.days.ago Workflow: Teaching resources workflow Task: Create PDF   Expires:in 2.days Time at this task: 20 minutes Priority: Normal	
Assigned to: Unassigned Moderation progress	

#### Figure 16 My tasks - Sort options

## Filter options

In addition to the existing filter options of *Filter by assignment, Filter by collection, Filter by owner* and *Filter by date modified*, **Filter by status** has been added. This allows users to only view Rejected tasks if required.

An example of the My tasks page filter options is shown in Figure 17.



	My tasks
Enter search terms	Screen options  Selection (0)  You have selected 0 results
Results 1 to 10 of 14 Sort Filter Share	► Select all results in this search
Filter by assignment	O Perform an action
All assignments	Moderate selected
Filter by collection All resources Filter by owner Select user	
Filter by date modified	
After	
Filter by status       All statuses	

Figure 17 My tasks - filter options

## My tasks page design

The **My tasks** page has been redesigned to allow for the selection of multiple tasks to enable actions to be performed on the selection in a single process. Each task now has a **Select** and **Moderate** button. A **Selection** panel displays in the top right which enables the selection of all tasks within the current results or to view or unselect the tasks currently selected.

An example is shown in Figure 18.



	My tasks
	✓ Screen options
Enter search terms Q	Selection (3)
Results 1 to 10 of 14 V Sort V Filter V Share	You have selected 3 results  View selected results  Unselect all results  Select all results in this search
Jane Austen's six major novels A look at the most famous of Jane Austen's novels, including Pride and Prejudice, Emma, Persuasion, Sense and Sensibility, Northanger Abbey and Mansfield Park. Status: Moderating   Last updated: <u>12 days ago</u> Moderating since: <u>17 days ago</u> Moderating since: <u>17</u>	Perform an action     Moderate selected
Australian Dog Breeds A documentary of Australian Dog Breeds Status: Moderating I Last updated: <u>12 days ago</u> Moderating since: <u>12 days ago</u> Workflow: Teaching resources workflow Task: Editorial   Expired: <u>2 days ago</u> Time at this task: <u>5 days</u> Priority: High Assigned to: Unassigned	
Moderation progress       1 moderation comment       Image: Comment       Image: Comment         Australian Kelpies       Image: Comment       I	
Moderation progress	
Dog images CHECKED CHECKED Images of dogs	

Figure 18 My tasks - new Select buttons and Selection panel

## **Bulk actions**

Functions to allow suitably privileged moderators to approve or reject a selection of tasks from the My tasks page using a bulk action is now available. These actions require new privileges to be granted before they display.

### **New privileges**

On the **Security Manager** page accessed from the *Administration Console*, two new privileges can be granted in the **Workflows** section:

- **APPROVE\_BULK\_TASKS** allows granted users to approve multiple tasks in one action.
- **REJECT\_BULK\_TASKS** allows granted users to reject multiple tasks in one action.



#### An example is shown in Figure 19.

institution		/iew / Modify ACLs				
Collections	1.					
Advanced Searches		Action	Privilege	Who?	Override?	O Add
Schemas					overnue:	
Remote Repositories		Grant	CREATE_WORKFLOW	System Administration Role		= Remove
Courses		Grant	DELETE_WORKFLOW	System Administration Role		
Workflows		Grant	EDIT_WORKFLOW	System Administration Role		~
Eearning Resources Work		Grant	MANAGE_WORKFLOW	System Administration Role OR C		
Teaching resources workf		Grant	APPROVE_BULK_TASKS	System Administration Role		~
Connectors		Grant	REJECT_BULK_TASKS	System Administration Role		
External Tools						
Taxonomies						
Harvester Profiles						
Portlets						
LTI Consumers						
HTML editor plugins						
Reports						
User Scripts	11					
Dynamic Collections						
EchoSystem servers						
Custom Links						00.000
v v						E Save

Figure 19 Security Manager - new Workflows privileges

### Approving or rejecting a selection of tasks

Multiple tasks can be selected then approved or rejected in one action. A single moderation comment can be recorded and will be stored in the moderation history for each task moderated in the bulk action.

#### To approve or reject a selection of tasks

- 1. From the **My tasks** page, select the tasks to be approved or rejected.
- 2. From the right-hand panel, select the **Perform an action** button. An example is shown in Figure 20.



	My tasks
	✓ Screen options
Enter search terms Q	Selection (2)
Results 11 to 14 of 14 Sort Filter Share	You have selected 2 results <ul> <li>View selected results</li> <li>Unselect all results</li> <li>Select all results in this search</li> </ul>
Canine breeds through the years A look at the the introduction of new dog breeds Status: Moderating   Last updated.2 minutes ago Moderating since: 13 days ago Workflow: Teaching resources workflow	O     Perform an action       O     Moderate selected
Task: Create PDF   Expires in 2 days Time at this task: about 21 hours Priority: Normal Assigned to: Unassigned Moderation progress Unselect	
Emily Bronte's Wuthering Heights Emily Bronte's Wuthering Heights made her famous. See this essay about her rise to fame after the book was published.	
Status: Moderating   Last updated: <u>13 days ago</u> Moderating since: <u>7 days ago</u> Workflow: Teaching resources workflow Task: Validate content   Expired: <u>5 days ago</u> Time at this task: <u>7 days</u> Priority: Normal Assigned to: Unassigned	
Moderation progress Vinselect 🖒 Moderate	
Authors of the 20th Century Photos and documents covering lives and works of a number of authors including Conrad, Eliot, Dickens, Collins	

#### Figure 20 My tasks - Perform an action

The **Bulk actions** dialog displays. An example is shown in Figure 21.

Bulk actions	۲
Choose an action to perform:	
Reject tasks	
Assign/reassign to moderator	<b>^</b>
Approve tasks	
Reject tasks	<b>•</b>
Emily Bronte's Wuthering Heights - Validate content	$\odot$
	Next →

Figure 21 My tasks - Bulk actions dialog



- 3. Select Approve tasks or Reject tasks from the Bulk actions dropdown and click Next.
- 4. Enter an optional approval message or Enter your rejection message (mandatory) in the dialog's text box, noting that this message will appear in the moderation history for each selected task. An example with an approval message is shown in Figure 22.

Bulk actions	۲
Approving tasks	
Enter an optional approval message:	
Formatting complete	
	11
← Prev ✓ Exec	ute

#### Figure 22 My tasks Bulk actions - Approving tasks comment text box

5. Click **Execute** then **OK** to confirm. The selected tasks move to the next task in the workflow if approved, or move to the relevant rejection point if rejected.

The **Bulk actions** dialog confirms the selected tasks have been successfully processed. An example is shown in Figure 23.



Bulk actions		۲
Approving tasks		
Canine breeds through the years - Create PDF	Success	
Emily Bronte's Wuthering Heights - Validate content	Success	
Operations finished		
		T

Figure 23 Bulk actions confirmation dialog

## Sequential task processing

In EQUELLA versions prior to 6.5, when moderating tasks from the **My tasks** page, the moderator was returned to the **My tasks** page after processing each task. A new feature is introduced in EQUELLA 6.5 that allows moderators to select the tasks they wish to moderate, and move through and moderate them sequentially without returning to the My tasks page.

#### To moderate tasks sequentially

1. From the **My tasks** page, select the tasks to be moderated, then select the **Moderate selected** button. An example is shown in Figure 24.



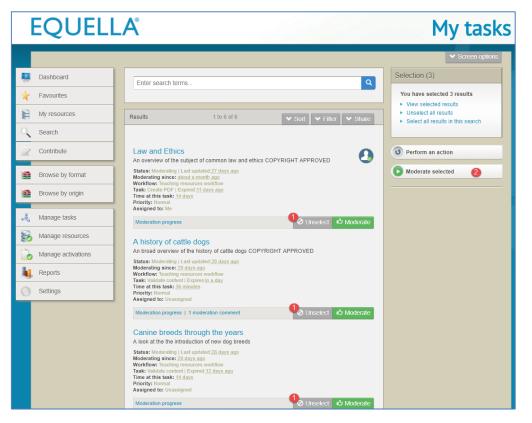


Figure 24 My tasks - Moderate selected

The **Moderation** page for the first task selected displays.

2. **Approve** or **Reject** the task to move to the Moderation page of the next task, and repeat the process until all the selected tasks are moderated. Once completed the My tasks page displays.

## Manage tasks

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

A number of features and enhancements have been introduced to the **Manage tasks** page in EQUELLA 6.5.

## Sort options

In addition to the existing sort options of *Priority (default), Expiry date, Time waiting in task* and *Title,* **Assignee** and **Workflow** have been added.

• Assignee – sorts the results based on who has been assigned to the task (Username, Unassigned or Me).



• **Workflow** – if there are tasks from multiple workflows, sorts results in Workflow order (alphabetical).

An example of the Manage Tasks page Sort options is shown in Figure 25.

			Manage tasks
Enter search terms Within all workflows		<u>م</u> ۲	✓ Screen options      Selection (0)      You have selected 0 results      Select all results in this search
Results Sort results by Title Priority	1 to 10 of 13 2	● <b>Sort</b> ♥ Filter ♥ Share	3 Perform an action
Expiry date Assignee Time waiting in task Workflow Title			

Figure 25 Manage tasks - Sort options

## **Filter options**

In addition to the existing filter option of *Filter by moderator*, **Filter by assignee**, **Filter by collection**, **Filter by owner**, **Filter by date modified** and **Filter by status** have been added. This provides administrators with more granular filtering capabilities.

An example of the Manage tasks page filter options are shown in Figure 26.



	Manage tasks
	✓ Screen options
Enter search terms     Q       Within all workflows     V	Selection (0) You have selected 0 results For Select all results in this search
Results 1 to 10 of 13 Sort Filter Share	<b>O</b> Perform an action
Filter by moderator	
Filter by assignee Select user Only show unassigned tasks	
Filter by collection All resources	
Filter by owner	
Filter by date modified After	
Filter by status	
All statuses	

#### Figure 26 Manage tasks - filter options

- Filter by moderator select a user to see all tasks that user can moderator.
- Filter by assignee select a user to see all tasks that have been assigned specifically to that user.
- Filter by collection select a collection to see all tasks in the workflow associated with that collection.
- Filter by owner select a user to see all tasks related to resources in the workflow that are owned by that user.
- Filter by date modified select date filters to see only tasks that fit the date criteria entered.
- Filter by status this allows administrators to select a specific status (for example, '*Rejected*') to view only tasks related to resources with that status.



## Manage tasks page design

The **Manage tasks** page has been redesigned to allow for the selection of multiple tasks to enable actions to be performed on the selection in a single process. Each task now has a **Select** button. A **Selection** panel displays in the top right which enables the selection of all tasks within the current results or to view or unselect the tasks currently selected.

	Manage tasks
	-
	✓ Screen options
Enter search terms Q	Selection (2)
	You have selected 2 results
Within all workflows	View selected results
Results 1 to 10 of 13 V Sort V Filter V Share	<ul> <li>Unselect all results</li> <li>Select all results in this search</li> </ul>
	O Perform an action
A history of cattle dogs An broad overview of the history of cattle dogs	
Status: Moderating   Last updated: <u>less than a minute ago</u> Moderating since: <u>14 days ago</u> Workflow: Teaching resources workflow Task: Create PDF   Expires:in <u>2 days</u> Time at this task: <u>about 22 hours</u> Priority: Normal	
Assigned to: Unassigned	
View item summary   10 remaining moderators	
Australian Cattle Dogs Video about Australian Cattle Dogs	
Status: Moderating   Last updated:7 <u>days ago</u> Moderating since: <u>14 days ago</u> Workflow: Teaching resources workflow Task: Create PDF   Expired. <u>4 days ago</u> Time at this task: <u>7 days</u> Priority: Normal Assigned to: Me	
View item summary   10 remaining moderators	
Australian Dog Breeds A documentary of Australian Dog Breeds	
Status: Moderating   Last updated;13.days.ago Moderating since; 13.days.ago Workflow: Teaching resources workflow Task: Editorial   Expired;2.days.ago Time at this task: <u>6.days</u> Priority: High Assigned to: Unassigned	
View item summary   10 remaining moderators   1 moderation comment + Select	
Australian Kelpies 🚯	

An example is shown in Figure 27.

Figure 27 Manage tasks - new Select buttons and Selection panel

## **Bulk actions**

All administrators who can access the **Manage tasks** page have access to a new function enabling them to assign multiple tasks to a specific moderator. Additionally, functions allowing suitably privileged administrators to approve or reject a selection of tasks from the **Manage tasks** page using



a bulk action is now available. These actions require new privileges to be granted before they display (see <u>New privileges</u> on page 17**Error! Bookmark not defined.** for further information).

### Assigning or reassigning a selection of tasks

Multiple tasks can be assigned to a specific moderator. For example, one moderator in a group of moderators might have more experience in a specific area, so an administrator can assign tasks with material relating to that area to that moderator. Or a moderator assigned to a group of tasks may be absent, so an administrator can reassign those tasks to an alternative moderator.

**NOTE**: Only users who are allocated as moderators for a task on the Moderators tab in the Workflow Task Editor (in the Administration Console) can be assigned a task.

#### To assign or reassign tasks to a specific moderator

- 1. From the **Manage tasks** page, select the tasks to be assigned.
- 2. From the right-hand panel, select the **Perform an action** button. An example is shown in Figure 28.



	Manage tasks
	Manaye Lasks
	✓ Screen options
Enter search terms	Q         Selection (2)           You have selected 2 results
Within all workflows	View selected results     Unselect all results     Select all results in this search
Results 1 to 10 of 13 V Sort V Filter V S	hare
A history of cattle dogs An broad overview of the history of cattle dogs	Perform an action     2
Status: Moderating   Last updated. <u>about an hour ago</u> Moderating since: <u>14 days ago</u> Workflow: Teaching resources workflow Task: Create PDF   Expires.jn.2 days Time at this task: <u>about 23 hours</u> Priority: Normal Assigned to: Unassigned	
View item summary   10 remaining moderators	elect
Australian Cattle Dogs Video about Australian Cattle Dogs Status: Moderating   Last updated.7 days ago Moderating since: <u>14 days ago</u> Workflow: Teaching resources workflow Task: Create PDF   Expired. <u>4 days ago</u> Time at this task: <u>7 days</u> Priority: Normal Assigned to: Me	0
View item summary   10 remaining moderators	elect
Australian Dog Breeds A documentary of Australian Dog Breeds Status: Moderating   Last updated: <u>13 days ago</u> Moderating since: <u>13 days ago</u> Workflow: Teaching resources workflow	
Task: Editorial   Expired: <u>3 days ago</u> Time at this task: <u>6 days</u> Priority: High Assigned to: Unassigned	
View item summary   10 remaining moderators   1 moderation comment	elect
Australian Kelpies	0

#### Figure 28 Manage tasks - Perform an action button

The **Bulk actions dialog** displays. An example is shown in Figure 29.



Bulk actions	8
Choose an action to perform:	
Assign/reassign to moderator	
You have selected the following 2 results.	Selections 1 to 2 of 2
A history of cattle dogs - Create PDF	8
Australian Dog Breeds - Editorial	0
	Next →

#### Figure 29 Manage tasks - Bulk actions dialog

3. Select Assign/reassign to moderator from the dropdown and click Next. The Select assignee dialog displays, as shown in Figure 30.

Bulk actions		۲
allocated moderator on the Moderators The search query can contain a name	b be assigned to the selected tasks. Note that the user selected must s tab for the task in the Workflow Template Editor. (first, last or login) or a partial name with a wildcard character (nam	
jo Jane Jones	Q Search jjones	
<ul> <li>John Smith</li> </ul>	jsmith	
Joe Bloggs	jbloggs	
	← Prev 🗸	Execute

#### Figure 30 Manage tasks - Bulk actions - Select assignee dialog

- 4. Search for the required moderator, keeping in mind that the user selected must be an allocated moderator on the *Moderators* tab for the task in the *Workflow Template Editor*.
- 5. Click Execute then OK to confirm. The selected tasks are assigned to the selected moderator.
- 6. The **Bulk actions** dialog confirms the selected tasks have been successfully processed. An example is shown in Figure 31.



Bulk actions		۲
Assigning/reassigning user to selected tasks		
A history of cattle dogs - Create PDF	Success	<b>^</b>
Australian Dog Breeds - Editorial	Success	
Operations finished		
		*

#### Figure 31 Bulk actions confirmation dialog

A notification is sent to the assignee to inform them of the task assignments.

### Approving or rejecting a selection of tasks

Administrators with the relevant privileges granted (see <u>New privileges</u> on page 17) can select multiple tasks for approval or rejection in one action from the **Manage tasks** page. A single moderation comment can be recorded and will be stored in the moderation history for each task moderated in the bulk action.

#### To approve or reject a selection of tasks

- 1. From the Manage tasks page, select the tasks to be approved or rejected.
- From the right-hand panel, select the **Perform an action** button. An example is shown in Figure 32.



	Managa tacks
	Manage tasks
	✓ Screen options
Enter search terms	Selection (2) You have selected 2 results
Within all workflows	View selected results  Unselect all results  Select all results in this search
Results 1 to 10 of 13 V Sort V Filter	✓ Share
A history of cattle dogs An broad overview of the history of cattle dogs	Perform an action
Status: Moderating   Last updated; <u>about an hour ago</u> Moderating since: <u>14 days ago</u> Workflow: Teaching resources workflow Task: Create PDF   Expires; <u>in 2 days</u> Time at this task: <u>about 23 hours</u> Priority: Normal Assigned to: Unassigned	
View item summary   10 remaining moderators	Ø Unselect
Australian Cattle Dogs Video about Australian Cattle Dogs Status: Moderating   Last updated: <u>7 days ago</u> Moderating since: <u>14 days ago</u> Workflow: Teaching resources workflow Task: Create PDF   Expired. <u>4 days ago</u> Time at this task: <u>7 days</u> Priority: Normal Assigned to: Me	•
View item summary   10 remaining moderators	+ Select
Australian Dog Breeds A documentary of Australian Dog Breeds Status: Moderating   Last updated: <u>13 days ago</u> Moderating since: <u>13 days ago</u> Workflow: Teaching resources workflow Task: Editorial   Expired. <u>3 days ago</u>	
Time at this task: <u>6 days</u> Priority: High Assigned to: Unassigned	
View item summary   10 remaining moderators   1 moderation comment	O Unselect
Australian Kelpies	

Figure 32 Manage tasks - Perform an action

The **Bulk actions** dialog displays. An example is shown in Figure 33.



Bulk actions	8
Choose an action to perform:	
Reject tasks	
Assign/reassign to moderator	<b>^</b>
Approve tasks	
Reject tasks	-
Emily Bronte's Wuthering Heights - Validate content	0
	Next →

#### Figure 33 Manage tasks - Bulk actions dialog

- 3. Select Approve tasks or Reject tasks from the Bulk actions dropdown and click Next.
- 4. Enter an optional approval message or Enter your rejection message (mandatory) in the dialog's text box, noting that this message will appear in the moderation history for each selected task. An example with an approval message is shown in Figure 34.

Bulk actions	8
Approving tasks	
Enter an optional approval message:	
Formatting complete	
	_//
← Prev ✓ Exec	ute

#### Figure 34 Manage tasks Bulk actions - Approving tasks comment text box

5. Click **Execute** then **OK** to confirm. The selected tasks move to the next task in the workflow if approved, or move to the relevant rejection point if rejected.



The **Bulk actions** dialog confirms the selected tasks have been successfully processed. An example is shown in Figure 35.

Bulk actions		۲
Approving tasks		
Canine breeds through the years - Create PDF	Success	
Emily Bronte's Wuthering Heights - Validate content	Success	
Operations finished		
		÷

Figure 35 Bulk actions confirmation dialog

## Manage resources workflow actions

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

A number of features and enhancements have been introduced to the **Manage tasks** page in EQUELLA 6.5.

## Filter options

In addition to the existing filter options of *Filter by owner, Filter by date modified and Filter by status,* **Filter by workflow** and **Filter by workflow tasks** have been added. This provides administrators with more granular filtering capabilities.

An example of the Manage resources page filter options are shown in Figure 36.



Man	age resources
	✓ Help ✓ Screen options
Enter search terms       Q         Within all resources <ul> <li>11 records have been filtered out - clear filters</li> <li>Add search to favourites</li> </ul>	Selection (5) You have selected 5 results > View selected results > Unselect all results > Select all results in this search
Results 1 to 7 of 7     Filter by owner     Select user     Show items with no owner     Filter by date modified     After	Perform an action
Filter by status         All statuses         Image: Contract of the status of the stat	
Show items with bad URLs  Filter by workflow  Teaching resources workflow ▼  Filter by workflow tasks	
Create PDF	

#### Figure 36 Manage resources - filter options

- Filter by assignee select a user to see all tasks that have been assigned specifically to that user.
- Filter by workflow this filter category displays only after the Only show items in moderation checkbox in the *Filter by status* category is selected. Select a workflow to display all resources that have a current task in the selected workflow.
- Filter by workflow task this filter category displays only after a workflow has been selected in the *Filter by workflow* category. Select a workflow task to display all resources that have a selected workflow task.

### Bulk actions

Two new functions related to workflow have been added to the bulk actions list accessed from the **Manage resources** page. **Remove from workflow** allows an administrator to remove a group of



resources from the associated workflow(s) which will change their status to 'Live'. Additionally, **Move to another workflow task** allows an administrator to select a group of resources and move them from their current task within a workflow to another task within the same workflow.

#### **Removing resources from workflow**

A new action is available to remove a selection of resources from their associated workflow(s) and change their status to '*Live*' (if the status is not already set at '*Live*').

To remove resources from the associated workflow

1. From the **Manage resources** page, select the **Filter** tab and select the **Only show items in moderation** checkbox in the *Filter by status* category. An example is shown in Figure 37.

Man	age resources
	✓ Help ✓ Screen options
Enter search terms Q Within all resources	Selection (0) You have selected 0 results Select all results in this search
7 records have been filtered out - clear filters	<b>O</b> Perform an action
Results 1 to 10 of 11 Sort Kitter Share	
Filter by owner Select user Show items with no owner	
Filter by date modified After	
Filter by status       All statuses       ▼       Only show items in moderation	
Filter by bad URL Show items with bad URLs	
Filter by workflow Teaching resources workflow	
Filter by workflow tasks All tasks	

Figure 37 Manage resources - Filter tab

Only resources in moderation display. To further filter results, you may also wish to select a specific workflow in the *Filter by workflow* dropdown.



2. Select the resources to be removed from workflow then click **Perform an action**. An example is shown in Figure 38.

	Manage resources
	✓ Help ✓ Screen options
Enter search terms	Q Selection (3)
Within all resources	You have selected 3 results           View selected results
7 records have been filtered out - clear filters	Unselect all results     Select all results in this search
Add search to favourites	
Results 1 to 10 of 11 Sort V Filter	Share
A history of cattle dogs O An broad overview of the history of cattle dogs	
Status: Moderating Last updated:about 3 hours ago Moderating since: <u>14 days ago</u>	
☆☆☆☆☆ 0 comments   Add to hierarchy   Add to favourites	<b>ð</b> Unselect
Australian Cattle Dogs	
Status: Moderating   Last updated.7 days.ago Moderating since: 14 days.ago	R.
00000 0 comments   Add to hierarchy   Add to favourites	∂ Unselect
Australian Kelpies	
The famous dogs of Australia Status: Moderating   Last updated:7 days ago Moderating since: 7 days ago	
COCOC 0 comments   Add to hierarchy   Add to favourites	Vinselect
Emily Bronte's Wuthering Heights • Emily Bronte's Wuthering Heights made her famous. See this essay about her rise to fame after the book was published.	
Status: Moderating   Last updated: <u>13 days ago</u> Moderating since: <u>7.days ago</u>	
☆☆☆☆☆ 0 comments   Add to hierarchy   Add to favourites	+ Select
Jane Austen's six major novels • A look at the most famous of Jane Austen's novels, including Pride and Prejudice, Emma, Persuasion, Sense and Sensibility, Northanger Abbey and Mansfield Park.	1 -
Status: Moderating   Last updated: <u>13 days ago</u>	

#### Figure 38 Manage resources - Perform an action

The **Bulk actions** dialog displays. An example is shown in Figure 39.



Remove from workflow	
Restore	-
	_
Suspend	_
Resume	_
Review	
Change owner	
Add collaborators	
Edit Metadata	
Move to another workflow task	
Execute script	
Clone	
Move	
Remove from workflow	

#### Figure 39 Manage resources - Bulk actions dialog

- 3. Open the **Choose an action to perform** dropdown, scroll down to select **Remove from workflow** and click **Next**.
- 4. Click **Execute** then **OK** to confirm. The selected resources are removed from their associated workflow(s) and their status will be changed to '*Live*'.

The **Bulk actions** dialog confirms the selected resources have been successfully processed. An example is shown in Figure 40.



Bulk actions		۲
Removing the selected resources from workflow:		
A history of cattle dogs	Success	
Australian Cattle Dogs	Success	
Australian Kelpies	Success	
Operations finished		
		*

### Figure 40 Bulk actions confirmation dialog

### **Resetting the workflow task**

A new action is available to move a selection of resources from their current workflow task to another workflow task in the same workflow.

NOTE: Resources must be filtered to show only items with a status of moderating from one workflow only for the **Reset to workflow task** action to display.

### To remove resources from the associated workflows

 From the Manage resources page, select the Filter tab, select the Only show items in moderation checkbox in the *Filter by status* category and select the relevant workflow from the *Filter by workflow* dropdown. An example is shown in Figure 41.



Man	age resources
	Help     Screen options
Enter search terms Within all resources	Selection (3) You have selected 3 results > View selected results > Unselect all results > Select all results in this search
Results 1 to 8 of 8 Sort 7. Filter Share	Perform an action
Filter by owner  Show items with no owner  Filter by date modified  After  Filter by status  All statuses  Only show items in moderation  Filter by bad URL	
Show items with bad URLs	
Filter by workflow 3 Teaching resources workflow	
Filter by workflow tasks All tasks	

### Figure 41 Manage resources - Filter tab

Only resources in moderation associated with the selected workflow display. To further filter results, you may also wish to select a specific workflow task in the *Filter by workflow tasks* dropdown.

2. Select the resources to be moved to another task then click **Perform an action**. An example is shown in Figure 42.



	Manage resource
	✓ Help ✓ Screen options
Enter search terms	Selection (5)
Within all resources	You have selected 5 results View selected results
10 records have been filtered out - clear filters	<ul> <li>Unselect all results</li> <li>Select all results in this search</li> </ul>
Add search to favourites	
esults 1 to 8 of 8 V Sort V Fil	ter V Share
Ethical law - an oxymoron?  C How do law and ethics go together - a look at how the two go hand in hand. Status: Moderating   Last updated: <u>less than a minute ago</u> Moderating since: <u>14 days ago</u> C C C C C C C C C C C C C C C C C C C	Unselect Unselect
Dog images Images of dogs Status: Moderating   Last updated: <u>about a minute ago</u> Moderating since: <u>13 days ago</u>	Unselect
Law and Ethics  An overview of the subject of common law and ethics Status: Moderating   Last updated:2_minutes ago Moderating since: 14 days ago Comments   Add to hierarchy   Add to favourites	Conselect
Emily Bronte's Wuthering Heights • Emily Bronte's Wuthering Heights made her famous. See this essay about her rise to fame after the book was published.	

Figure 42 Manage resources - Perform an action

The **Bulk actions** dialog displays. An example is shown in Figure 43.



Bulk actions	8
Choose an action to perform:	
Remove from workflow	
Archive	: <b>*</b>
Suspend	
Resume	
Review	
Change owner	
Add collaborators	
Edit Metadata	
Reset to workflow task	
Execute script	
Clone	
Move	
Remove from workflow	-
	Next →

Figure 43 Manage resources - Bulk actions dialog – Reset to workflow task

3. Open the **Choose an action to perform** dropdown, scroll down to select **Move to another workflow task** and click **Next**.

The **Moving to another workflow task** dialog displays. An example is shown in Figure 44.

Bulk actions	8
Resetting to another workflow task	
Teaching resources workflow         Select the workflow task to which the selected items are to be reset to.         Validate content         Image: Content         Resetting to validate content as processes have not been followed correctly, as per moderator email.	
ß	
← Prev ✔ Execut	te

### Figure 44 Moving to another workflow task dialog

- 4. Select the required workflow task to which the selected resources are to be moved.
- 5. **Enter an optional message**. This message will be stored with the workflow task and displayed in the moderation history for each item.



6. Click **Execute** then **OK** to confirm. The selected resources are moved from their current workflow tasks to the workflow task selected. Relevant notifications are sent to the moderators.

The **Bulk actions** dialog confirms the selected resources have been successfully processed. An example is shown in Figure 45.

Bulk actions		۲
Moving to another workflow task		
Emily Bronte's Wuthering Heights	Success	<b>^</b>
Law and Ethics	Success	
Law and medical ethics	Success	
Ethical law - an oxymoron?	Success	
Dog images	Success	
		•

Figure 45 Bulk actions confirmation dialog

The **Moderation history** for the resources moved from one workflow task to another reflects the process. An example is shown in Figure 46.



Moderation history			← Prev Next →
Event	User	Date ▼	Share with others
Task Create PDF moved to task Validate content (Show comment)	EQUELLA Documentation	<u>3 minutes</u> ago	Add to favourites
Edited	EQUELLA Documentation	<u>15 minutes</u> ago	Details
Completed for script Basic Script		a day ago	Owner: EQUELLA Documentation
Accepted for task Editorial	EQUELLA Documentation	a day ago	Collection: Teaching Resources
Accepted for task Validate content (Show comment)	System	<u>6 days ago</u>	Version: 1 (show all)
Workflow reset	EQUELLA Documentation	<u>14 days ago</u>	Status: Moderating Moderation progress
Submitted for moderation	EQUELLA Documentation	<u>14 days ago</u>	Moderation history
Edited	EQUELLA Documentation	14 days ago	Actions
Contributed	EQUELLA Documentation	<u>14 days ago</u>	Change ownership Clone item into a collection
Basic details 🧼 Include edits 💽 Include all moderation	details		Create a new version Delete this version Edit this version Export Modify key resource Move item into another collection New contribution of same type Redraft this version Suspend this version

Figure 46 Moderation history reflecting task movement

# **Workflow attachments**

Moderators can now upload files relevant to the workflow during the moderation process (for example, a file might be uploaded to illustrate required document formats relevant to attachments being moderated). These files can be viewed only by moderators and administrators during workflow task processing.

### Uploading a workflow file

1. From the **My tasks** page, open a workflow task and select either **Reject** or **Approve**. The **Approve** or **Reject task** dialog displays. An example is shown in Figure 47.



Approve task
Approval message
Attached files Click to select files or drag and drop files here
✓ Approve Cancel

### Figure 47 Approve task dialog

- 2. Enter a message in the message box note that a message is mandatory if a file is going to be attached.
- 3. Click to select files or drag and drop files into the drag and drop box below the message text box. The file(s) display as links below the upload box. An example is shown in Figure 48.

Approve task	8
Approval message	
Please see style guide attached for correct format protocols	
Attached files	
Click to select files or drag and drop files here	
university of oxford style guide.pdf	Ø
	-
	Concel
Appro Vice	ove Cancel

Figure 48 Approve task dialog with attached file



4. Click **Approve** (or **Reject**) to approve (or reject) the task. The file(s) is stored with the comment, and can be viewed within workflow comments. An example of the **Moderation** page showing the comment and attachment is shown in Figure 49.

EQUEL	LA Resour	ce summary
Submitted by: EQUEL 4 comments (post a c	gned (assign to me) LA Documentation for moderation by EQUELLA Documentation, Sue Smith, Bob Carter (show all) comment) umentation Jess than a minute ago guide attached for correct format protocols	< Prev 2 of 6 tasks Next >
	Teaching Resources > A history of cattle dogs	
Dashboard     Favourites     My resources	A history of cattle dogs Description An broad overview of the history of cattle dogs COPYRIGHT APPROVED	← Prev Next →     ✓ View metadata     ✓ Approve
C Search	File attachments	Reject
Contribute	Kelpiet jpg	Details
<ul><li>Browse by format</li><li>Browse by origin</li></ul>	¥ Full screen Add a comment Rate this resource ☺☆☆☆☆	Owner: EQUELLA Documentation Collection: Teaching Resources Version: 1 (show all)

Figure 49 Moderation page – comment with attached file link

# Script task

In versions prior to EQUELLA 6.5 there was one type of task, *Workflow task*, available as a step type for workflows. EQUELLA 6.5 introduces the **Script task** step type, which enables administrators to configure a script that will run automatically when a resource reaches that step in the workflow. The resource then continues to the next workflow task without user moderation.

Specific users or groups can be configured to receive notifications if the script fails (or successfully runs).

## Configuring a Script task

Script tasks are configured from the Workflow Template Editor accessed from the Administration Console.

### To configure a workflow Script task

1. From the **Administration Console**, **Workflow Templates** option, open the required Workflow template. An example is shown in Figure 50



Administration Cons	ole - v6.5.r56 (	—	□ ×
EQUELLA	Adminis	tration	Console
Metadata Schemas	W	orkflow Templat	es 👳
Collection Definitions	Learning Resourc Teaching resourc		2
Advanced Searches	Teaching resource	es worknow	2
Dynamic Collections			
Taxonomies			
Workflow Template			
Hierarchy Editor			
Reporting			
Harvester Profiles			
Remote Repositories			
Courses			
User Management			
Security Manager			
	Add	Edit	Remove
Exit Console	Clone	🛓 Import	윹 Export

Figure 50 Administration Console - Workflow Templates

The **Workflow Template Editor** displays the selected workflow details. An example is shown in Figure 51.

À	Workflow	Template Editor - Documentation Institution - Teaching resources workflow	×
١	Workflow Steps	Access Control	
١	Norkflow name:	Teaching resources workflow	
Ň	Norkflow owner:	EQUELLA Documentation [Documentation] Search	
	Should reso	rces become live immediately upon submission?	
-			_
		Start ] Validate content ] Editorial ● Basic Script ] Create PDF	
		Close Close	e

Figure 51 Workflow Template Editor

 Highlight the parent level to which the Script Task is to be added then click Add. Select Script Task from the Select a step type list. An example is shown in Figure 52.



Workflow Template Editor - Documentation Institution - Teaching resources workflow	×
Workflow Steps Access Control	
Workflow name: Teaching resources workflow Select a step type	
Workflow owner: EQUELLA Documentation [Documentation]	
Should resources become live immediately upon submission? 	_
1 Workflow Task	_
Script Task	

Figure 52 Workflow Template Editor - Add a step type



The Script Task Editor Details page displays. An example is shown in Figure 53.

🕷 Script Task Editor	$\times$
Details Notifications	
Script name Copyright script	
Description Add 'Copyright approved' to the description	\$
Make this resource live automatically:	
🔿 on arrival at this task	
On completion of this task	
Proceed to next task if a scripting error occurs	
Check this box to allow the resource to continue to the next task in the workflow if a scripting error occurs. A notification will be sent to the us on the Notifications tab for this task. If left unchecked and a scripting error occurs, the resource will stay at this scripting task until it is review notified user. Script	
1 xml.set('item/itembody/description', xml.get('item/itembody/description') + ' COPYRIGHT APPR	OVED') 🔨
2	
	~
K Line 2 Colome 0	>
Line: 2, Column: 0	
Save	Close

Figure 53 Script Task Editor Details page

- 3. Enter a Script name.
- 4. Enter a **Description**.
- 5. If desired, select Make this resource live automatically and choose either:
  - On arrival at this task (the item's status becomes 'live' as soon as it arrives at the script task) or
  - On completion of this task (the item's status becomes 'live' as soon as the script task has successfully run.
- 6. Select **Proceed to next task if a scripting error occurs** to continue to the next task in the workflow if an error occurs. A notification is sent to the relevant administrator. If left unchecked and a scripting error occurs, the resource will stay at the script task until the task is corrected by an administrator.



- 7. Enter the **Script** in the script edit box.
- 8. Click the **Notifications** tab. The **Script Task Editor Notifications** page displays. An example is shown in Figure 54.

🖗 Script Task Editor	×
Details Notifications	
Select the users to notify if there is a script error	
Search Browse	EQUELLA Documentation [Documenta 🔺
Search for:	Search
in: O Users Groups	
Results:	
	>
	<
	<<
	<b>~</b>
	< >>
Select users to notify once the script has successfully executed	
Search Browse	^
Search for:	Search
in: OGroups	
Results:	<u>^</u>
	>
	<
	~
	Save Close

#### Figure 54 Script Task Editor Notifications tab

9. Search for and **Select the users to notify if there is a script error** (Users and/or Groups). These users will be notified by email and internal notifications if a script is not successfully executed.

# NOTE: This field is mandatory. At least one user must be selected to enable the workflow to be successfully saved.

**NOTE**: If a script fails, and Proceed to next task if a scripting error occurs has not been selected, on correcting the script, the script will automatically rerun and the tasks will move to the next step.

10. Select **Select the users to notify once the script has successfully executed** for notifications to be sent every time the script task run successfully as part of the workflow. Note that this could result in large numbers of notifications that may not necessarily be useful. If selected, search for and select the users and/or groups to be notified.



11. Click Save.

# **Notification emails**

Prior to EQUELLA 6.5, email notifications have been restrictive, as one subject line was shared by all notification types. The subject line language string could be edited using the language pack functionality, but any changes would apply to all EQUELLA notifications.

EQUELLA 6.5 brings changes to email notifications, including:

- Individual subject titles for each type of notification (allowing changes to be made using the language pack functionality)
- Meaningful subject titles
- Useful and easy to read body text (text can be changed using the language pack functionality)
- HTML format

## Notification email definitions

Different types of notifications are generated in EQUELLA, through workflow and other functions. The following is a list of notification emails by **Subject** title (which can be changed using language pack functionality):

- NOTIFICATION: Resources in a collection you are watching are now 'Live' sent to users who have selected to receive *New resource notifications* for one or more collections (see <u>New</u> resource notifications on page 52).
- NOTIFICATION: Overdue workflow tasks sent to moderators for workflow tasks that have become overdue. An example is shown in Figure 55.



NOTIFICATION: Overdue workflow tasks Inbox x					
Admin <fore@the to me ▼</fore@the 	Admin <fore@theforemann.com> to me  ■</fore@theforemann.com>				
Hi Joe Bloggs,	Hi Joe Bloggs,				
The following workflow tasks are now overdue:					
Resource name Owner Task name Due date <u>Moderate</u>	Tasmanian Devils and the extinction threat EQUELLA Documentation (Documentation) Validate content Sep 28, 2017				
Resource name Owner Task name Due date <u>Moderate</u>	Tasmanian Devils - a history EQUELLA Documentation (Documentation) Validate content Sep 28, 2017				
Resource name Owner Task name Due date <u>Moderate</u>	Dogs and anxiety EQUELLA Documentation (Documentation) Validate content Sep 28, 2017				
Resource name Owner Task name Due date <u>Moderate</u>	A history of cattle dogs EQUELLA Documentation (Documentation) Validate content Sep 28, 2017				
Resource name Owner Task name Due date <u>Moderate</u>	Ethical law - an oxymoron? EQUELLA Documentation (Documentation) Validate content Sep 28, 2017				
Resource name Owner Task name Due date <u>Moderate</u>	Law and medical ethics EQUELLA Documentation (Documentation) Validate content Sep 28, 2017				

### Figure 55 Example Overdue tasks notification email

- **NOTIFICATION: Your resource has been rejected** sent to the owner/s of resources if the resource is rejected at any step in the workflow.
- **NOTIFICATION: Resources you own contain bad URLs** sent to the owners of resources which contain bad URLs. The scheduled Bad URL checker generates these notifications.
- NOTIFICATION: New resources have become available sent to the users selected in the Notify users when item becomes available section when the Share with others button is used from a Draft resource summary page.
- NOTIFICATION: Script task (script name) has failed sent to the user/s selected on the Notifications tab of the Script task to alert them to a script error (see <u>Configuring a Script task</u> on page 44).



- NOTIFICATION: Script task "script name" has executed successfully sent to the user/s selected on the Notifications tab of the Script task to notify them that the script has run successfully (see <u>Configuring a Script task</u> on page 44).
- NOTIFICATION: Resources have been assigned to you for moderation sent to a moderator if multiple tasks have been assigned to that moderator.
- NOTIFICATION: Resources you own have been moderated to 'Live' sent to the owner/s of resources that have become 'live' (see <u>My resource notifications</u> on page 55).
- NOTIFICATION: A resource has been assigned to you for moderation (*workflow task name*) sent to a moderator if a task has been specifically assigned to that moderator.
- NOTIFICATION: A resource has reached a workflow task (*workflow task name*) allocated to your moderation group sent to all moderators when a resource reaches a task where a group of moderators has been specified for task moderation. An example is shown in Figure 56.

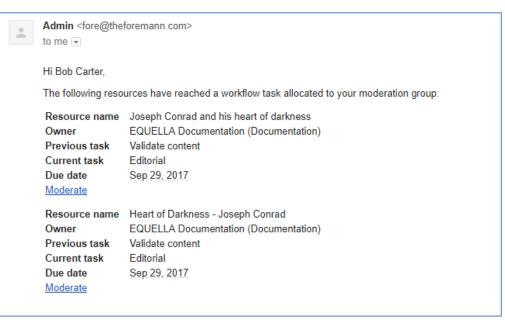


Figure 56 Example email notification for multiple moderator tasks

 NOTIFICATION: A rejected resource has reached a workflow task (workflow task name) allocated to your moderation group – sent to all moderators when a resource is rejected back to a task where a group of moderators has been specified for task moderation. An example is shown in Figure 57.



NOTIFICATION: A rejected resource has reached a workflow task (Validate content) allocated to your moderation group					
÷	Admin <fore@theforem to me 💌</fore@theforem 	ann.com> 11:38 AM (0 minutes ago) 🏠 🔺 👻			
	Hi Bob Carter,				
	The following resource has been rejected back to a workflow task allocated to your moderation group:				
	Resource name Owner Rejected task Rejection reason Rejection attachment Current task Due date <u>Moderate</u>	A history of cattle dogs EQUELLA Documentation (Documentation) Create PDF "Formatting is still wrong - see attached" by EQUELLA Documentation (Documentation) <u>university of oxford style guide.pdf</u> Validate content Sep 28, 2017			

Figure 57 Example rejection email for task with multiple moderators

NOTIFICATION: A rejected resource has been assigned to you for moderation (workflow task name) – sent to a moderator when a resource is rejected back to a task specifically assigned to that moderator.

## **Notification options**

The notification options on the **Edit User** page accessed by clicking on the **Username** in the top right of any EQUELLA screen have been enhanced to allow users to better customise email notifications.

Prior to EQUELLA 6.5, in the **Notifications** section of the *Edit User* page, all email notifications can be switched off and specific collections selected by the user. They are notified when new resources become available (*'live'*) in those collections.

EQUELLA 6.5 has three separate sections for setting notifications:

### New resource notifications

This section enables a user to select collections to 'watch'. The user is notified of any new resources that become available ('live') in the selected collections. An example is shown in Figure 58.



	P 0 🔺 13	
EQUELL	Å	Edit user
	Dashboard > Edit user	
<ul> <li>Dashboard</li> <li>Favourites</li> <li>My resources</li> <li>Search</li> <li>Contribute</li> <li>Browse by format</li> <li>Browse by origin</li> <li>Manage tasks</li> <li>Manage tasks</li> <li>Manage activations</li> <li>Reports</li> <li>Settings</li> </ul>	Modify user details         Username:         Documentation         First name:         EQUELLA         Documentation         Email:         documentation@edalexsolutions.com         Login notice         Hide login notice         Accessibility Mode         Selecting Accessibility Mode         Selecting Accessibility Mode         Enable Accessibility Mode         New resource notifications         You will be notified when new resources become available in the selected collections.	Save
	Select the collections to watch:	

Figure 58 Edit user page - New resource notifications

## Workflow email notifications

This section allows the user to unsubscribe from receiving workflow task-specific email notifications. Workflow task notifications are emailed by default, but the user can uncheck the collections from which they do not wish to receive workflow task email notifications.

### NOTE: Email notifications are always sent for rejected tasks regardless of configuration.

An example is shown in Figure 59.



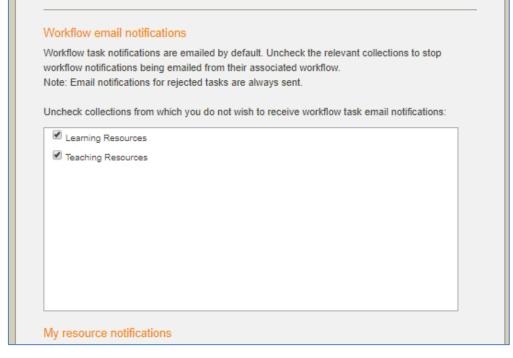


Figure 59 Edit user - Workflow email notifications

Regardless of email notification configuration, internal notifications are always found on the **Notifications** page. An example is shown in Figure 60.

	en e	6 🔔 13 👤 DOCUMENTATION 🕐 LOG OUT
		•
EQUELL	Å	Notifications
		✓ Screen options
Dashboard	Enter search terms	Selection (0)
★ Favourites		You have selected 0 notifications
My resources	Results 1 to 10 of 13 V Filter V Share	search
C Search		Clear selected
Contribute	Heart of Darkness - Joseph Conrad	
Browse by format	Reason: Moderation overdue	
Browse by origin	Clear + Select	
I Manage tasks	Canine breeds through the years A look at the the introduction of new dog breeds	
Manage resources	Reason: Moderation overdue  Citean + Select	
Manage activations		
Reports	Law and Ethics An overview of the subject of common law and ethics COPYRIGHT APPROVED	
Settings	Reason: Assigned task  Clean + Select	
	Heart of Darkness - Joseph Conrad An overview of the novel Reason: Assigned task X Clear + Select	
	Dog images	

### Figure 60 Notifications page



## My resource notifications

The user can check this box if they wish to receive notifications that resources they own have become 'live'. An example is shown in Figure 61.

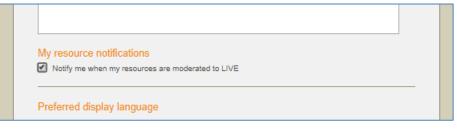


Figure 61 My resource notifications

# **Contact Client Support**

We are always happy to help.

Please call 1800 EDALEX (1800 332539) to speak to our Support Team or email <a href="support@edalexsolutions.com">support@edalexsolutions.com</a>.