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EQUELLA Features Guide

Version 6.6

Document History

Date	Change	Responsible
29/05/2018	DRAFT	CF
12/06/2018	Published	CF

June 2018 edition.

Information in this document may change without notice.

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EQUELLA 6.6 features overview

This guide provides an overview of the features released in EQUELLA 6.6.

The following features are included:

- **Repeater control enhancements** – an extra Add button displays at the top of the repeater entry list, and a confirmation dialog now displays on deletion of a repeater entry. See Repeater wizard control enhancements on page 5.

- **Extra information from Moodle stored in Item XML** – additional information is now stored in an item's XML for items that are contributed in Moodle. See Moodle information stored in item XML on page 7.

- **Settings page user interface** – the Setting page has been improved for easy navigation. See Settings page user interface on page 9.

- **Course Editor moved to web** – the Course Editor and its functionality has been moved out of the Administration Console and into the web, and is now accessed from the Settings page. See Course Editor on page 10.

- **New UI template –** uses a new Navigation menu and header, and allows all EQUELLA pages to display in a full-screen format. See New UI template on page 32.

- **Search page prototype with facet searching functionality –** a prototype of the new search page which incorporates the ability to configure facets to use for filtering, using stored metadata. See Search page prototype on page 34.

- **Reporting** – a number of Reporting Tutorials are now available to assist with the querying of the EQUELLA database.

Repeater wizard control enhancements

Two enhancements have been added to the Repeater wizard control which displays on Contribution Wizard pages:

Add button at top of Repeater list

An **Add [Name]** button now displays at the top of the repeater list as well as the bottom. If the top button is selected, the entry is added to the top of the list. Selecting the button at the bottom adds the entry to the bottom of the list.

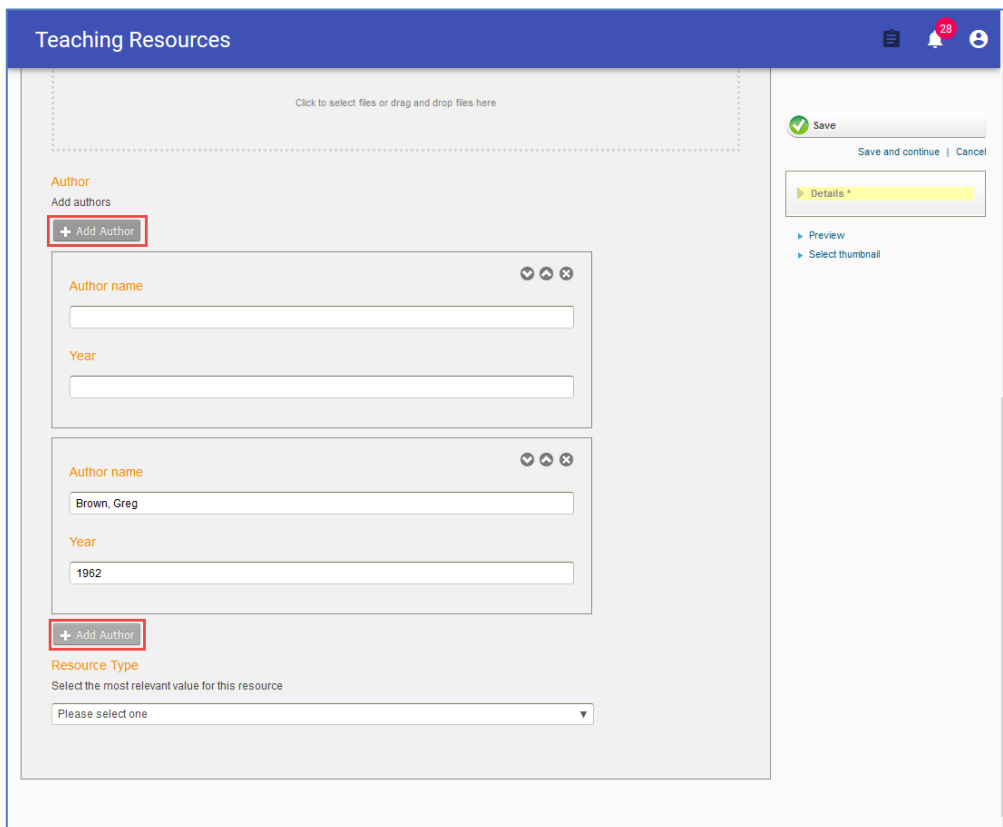An example is shown in Figure 1 below.

Figure 1 Repeater wizard control – new button at top of Repeater control list

Confirmation on deletion of Repeater entry

A confirmation dialog now displays when the delete icon is selected for a repeater entry.

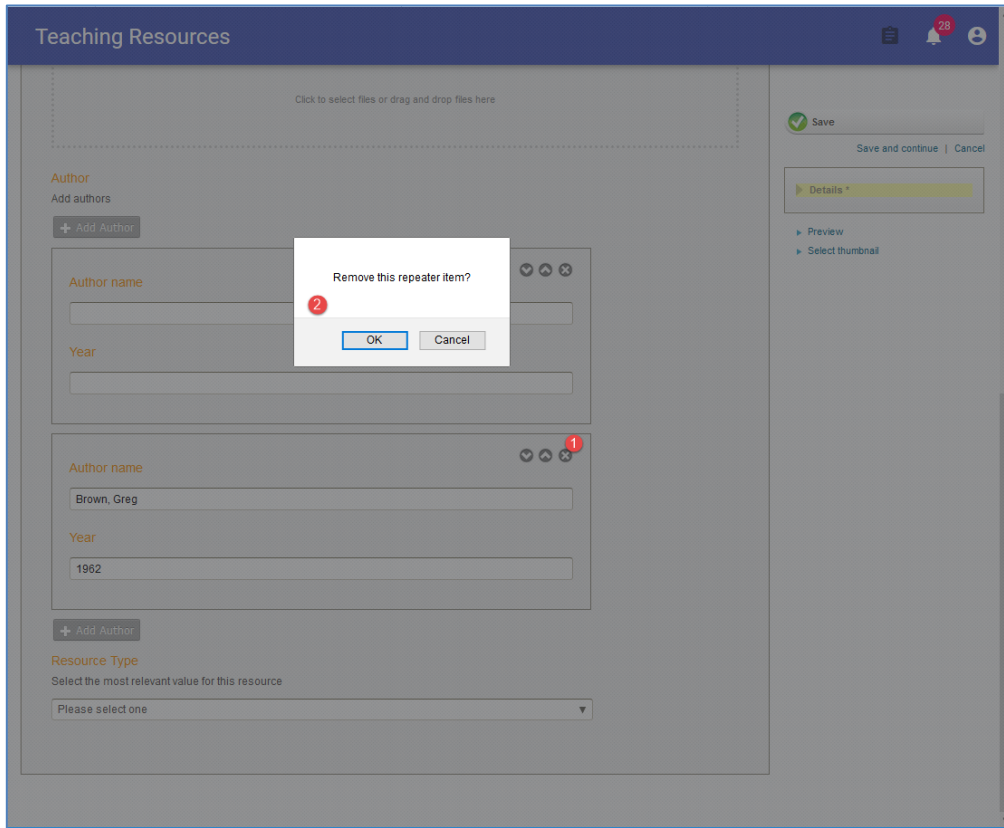An example is shown in Figure 1 below.

Figure 2 Deletion confirmation dialog

Moodle information stored in item XML

More information is now stored in the item XML for items that have been contributed in Moodle either using the file drag and drop function or contributing using either quick contribute or accessing a full contribution wizard from Moodle.

Changes have been made to the [EQUELLA Moodle module](#) to enable this functionality. Users will need to have the latest version to store the extra information.

Below is an example of an item XML where the item has been contributed via Moodle. Note that the **bolded** entries are new for any items contributed in Moodle using contribution methods other than the Moodle file drag and drop contribution function. The entries **bolded** **and** shown in **red** are also new for contributions made using the Moodle file drag and drop contribution function.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<xml>
    <item id="7135c135-e682-471c-a53c-0b6d357a14c7" itemdefid="01a5e1b9-cc89-4ef2-92a8-
40e24110157c" itemstatus="live" key="451" moderating="false" version="1">
        <name>A test title</name>
        <description>A test desc</description>
        <attachments>
            <attachment type="local">
                <conversion>false</conversion>
                <size>240007</size>
                <uuid>9089255a-2cf0-4e9f-a550-08da1b854db9</uuid>
                <file>fade.jpg</file>
                <description>fade.jpg</description>
                <restricted>false</restricted>
                <thumbnail>_THUMBS/fade.jpg.jpeg</thumbnail>
                <attributes/>
            </attachment>
        </attachments>
        <staging/>
        <newitem>false</newitem>
        <thumbnail>initial</thumbnail>
        <owner>83bb1131-e54c-6f1e-e063-9d00597c8d97
            <user id="83bb1131-e54c-6f1e-e063-9d00597c8d97">
                <username>admin</username>
                <givenname>ad</givenname>
                <surname>min</surname>
                <email>ad@min.com</email>
            </user>
        </owner>
        <datecreated>2018-01-12T17:50:43+1100</datecreated>
        <datemodified>2018-01-12T17:50:43+1100</datemodified>
        <dateforindex>2018-01-12T17:50:43+1100</dateforindex>
        <rating average="-1.0"/>
        <badurls/>
        <history>
            <statechange applies="false" date="2018-01-12T17:50:43+1100" state="live"
user="83bb1131-e54c-6f1e-e063-9d00597c8d97">83bb1131-e54c-6f1e-e063-
9d00597c8d97</statechange>
        </history>
        <moderation>
            <liveapprovaldate>2018-01-12T17:50:43+1100</liveapprovaldate>
        </moderation>
```

```xml
        <navigationNodes/>
    </item>
    <integration>
        <course>
            <code>eq101</code>
            <fullname>Equella 101</fullname>
            <shortname>eq101</shortname>
        </course>
        <itemdescription>A test desc</itemdescription>
        <user>
            <username>admin</username>
            <lastname>User</lastname>
            <firstname>Admin</firstname>
        </user>
        <file>
            <mimetype>image/jpeg</mimetype>
            <size>240007</size>
            <filename>fade.jpg</filename>
        </file>
        <item>
            <keyword/>
            <iscopyright>No</iscopyright>
            <title>A test title</title>
            <description>A test desc</description>
        </item>
        <moodle>
            <category>
                <category>
                    <category>
                        <name>Faculty of Arts</name>
                    </category>
                    <name>Sociology</name>
                </category>
                <name>2018</name>
            </category>
            <course>
                <id>2</id>
                <idnumber>eq101</idnumber>
            </course>
        </moodle>
        <filesize>240007</filesize>
        <copyrightflag>No</copyrightflag>
        <lms>Moodle</lms>
        <itemkeyword/>
        <contributiontype>quick</contributiontype>
        <displayname>A test title</displayname>
    </integration>
    <template>entity/107/displaytemplate/</template>
    <itemdir>/workflow/items/7135c135-e682-471c-a53c-0b6d357a14c7/1/</itemdir>
    <sessionparams/>
    <collection>No Workflow</collection>
</xml>
```

Settings page user interface

The **Settings** page user interface has been updated to improve navigation. Each setting has been assigned one of the following four categories:

- **General** – all settings that don't fit the other three categories

- **Integrations** – any settings related to EQUELLA integrations with third party products

- **Diagnostics** – diagnostic tools

- **UI** – options associated with the EQUELLA UI templates

To view the settings in each category, click the arrow to the right of the category name. An example is shown in Figure 3.
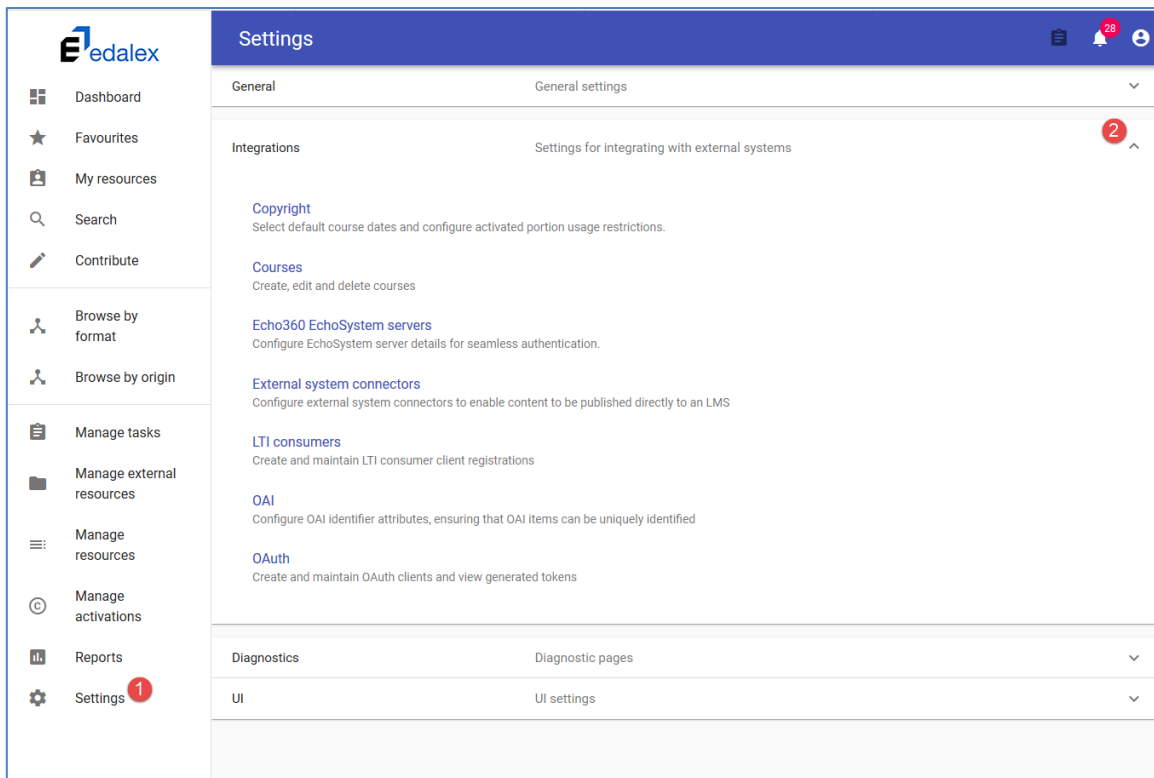
Figure 3 Settings page with categories

Course Editor

The Course editor can now be accessed from the **Settings** page (but is still available from the Administration Console at this point).

Accessing the Course Editor

To access the Course Editor:

1. From **Settings**, select **Integrations** then **Courses**. An example is shown in Figure 4.
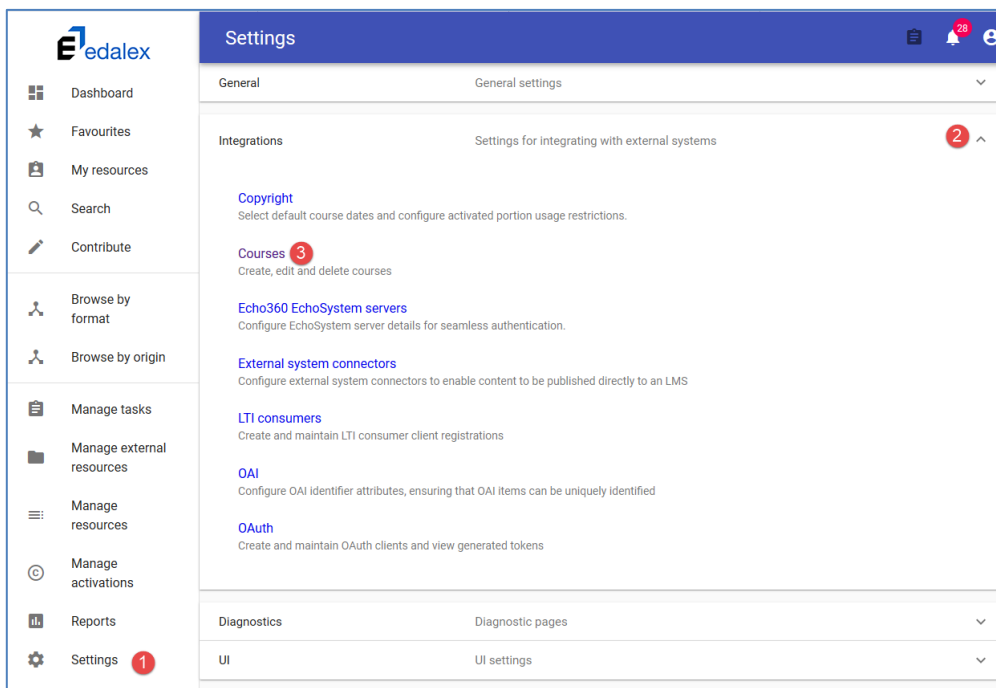
Figure 4 Access Courses

The **Courses** page displays. An example is shown in Figure 5.
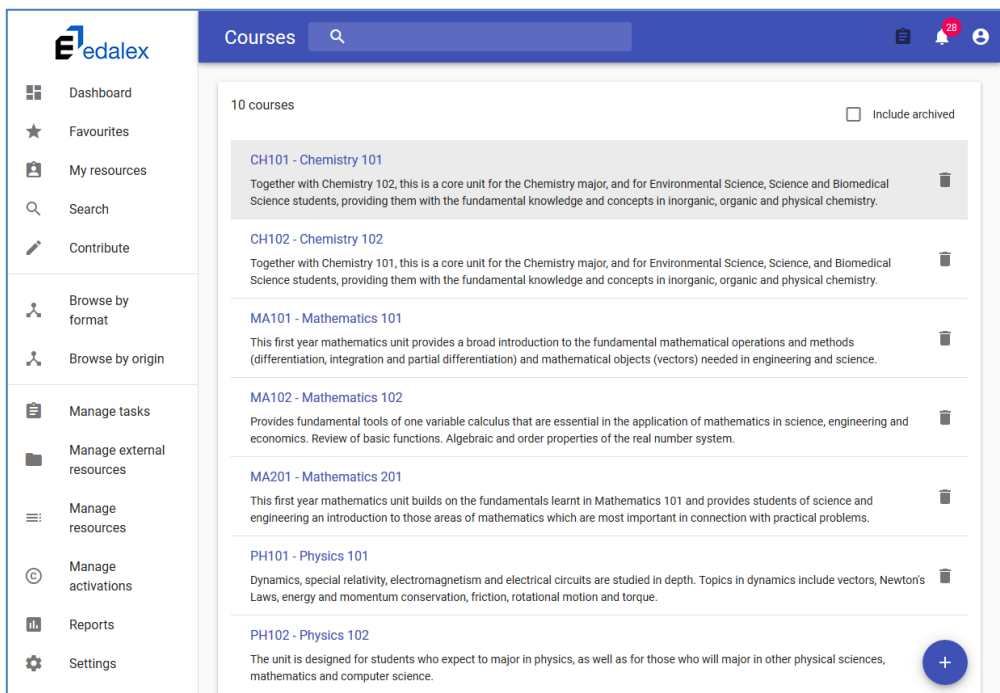
Figure 5 Courses page

The **Courses** page displays the following components:

- **Search box** – start typing in a search term to display only matching results. As little as a single character will trigger the search matching, and the more characters added to the query, the more accurate the results displayed. The Course Name, Description and Code fields are used to find matches to the entered search query.

- **Results panel** – all courses display until a search term is entered. A scroll bar allows users to move up and down the results list. Course results display:

  - **Code & Title** – click this link to view and/or edit course details

  - **Description** – course description

  - **Delete icon** – click to delete the selected course

- **Include archived checkbox** – select to include archived courses in the results list

- **Add (Plus)** button – click to add a new course

Adding a course

To add a course

1. From the **Courses** page, click the **Add** button. An example is shown in Figure 6.
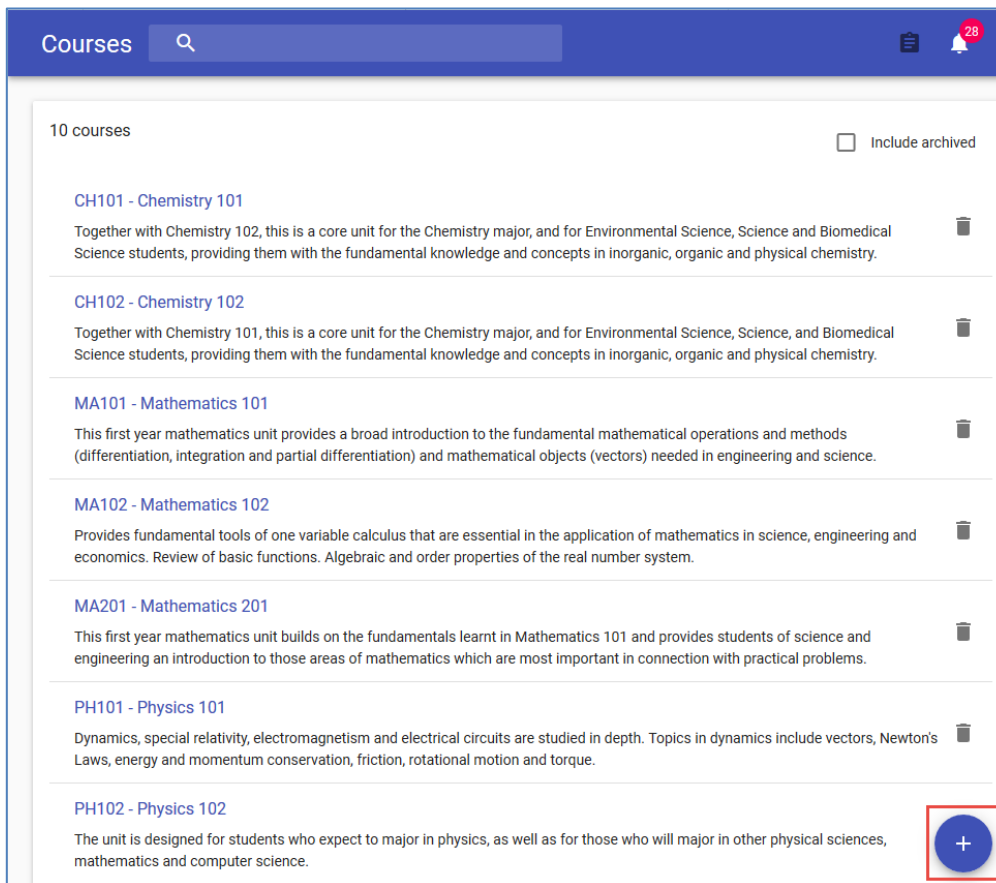
Figure 6 Courses page - Add button

The **Edit Course** page displays, as shown in Figure 7.
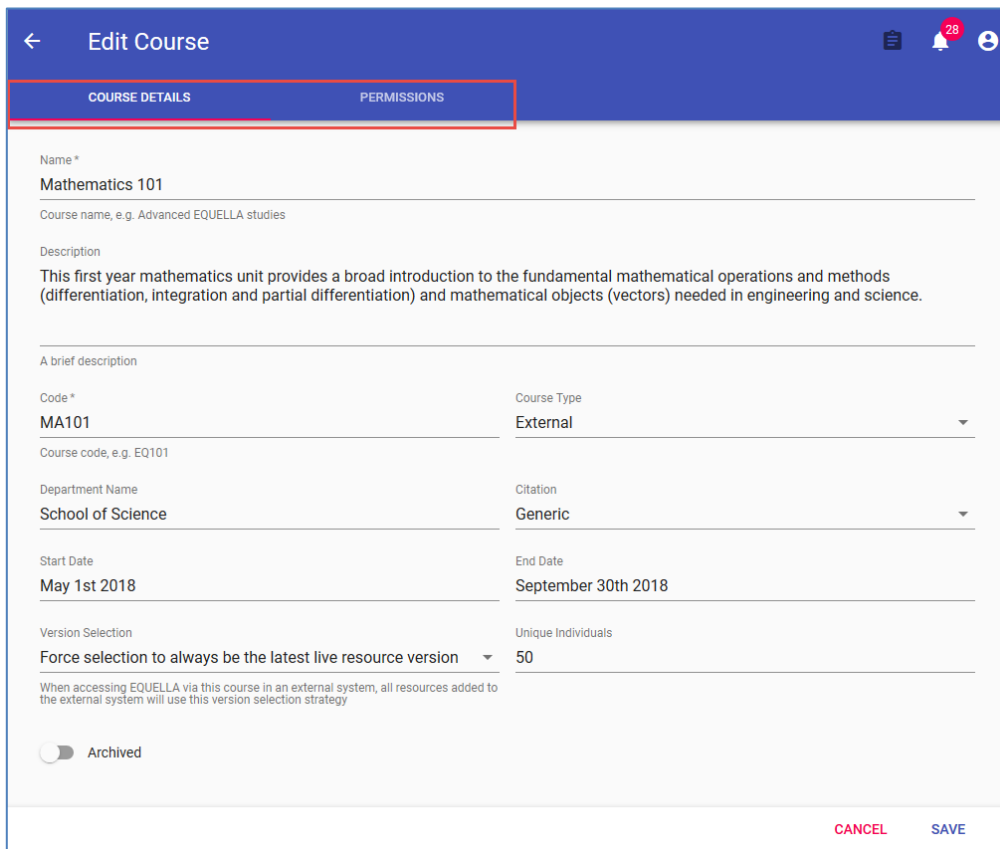
Figure 7 Edit Course page

The **Edit Course** page has two tabs, **Course Details** and **Permissions**.

Course Details

The Course Details tab records information about the course.

2. Enter the following:

- **Name** (mandatory) - no limit to the number of characters.

- **Description** – no limit to the number of characters

- **Code** (mandatory) – limited to 128 characters

- **Course Type** – drop-down with hard-coded values (*Internal, External, Staff*)

- **Department Name** – limited to 512 characters

- **Citation** – drop-down displaying available Citation types

- **Start Date** – select from calendar. If left blank, will use default dates set in the Selection Sessions setting.

- **End Date** – select from calendar. If left blank, will use default dates set in the Selection Sessions setting.

- ▪ **Version Selection** – drop-down with hard-coded values. Defaults to *Default* which takes the **Version Selection option** set on the **Selection Sessions** setting page. To override this setting, select from *Force selection to be the resource version the user is* viewing, *Force selection to always be the latest live resource version, user can choose, but default to be the resource version the user is viewing* or *User can choose, but default to be the latest live resource version*.

- ▪ **Unique Individuals** – the number of students expected to access the course.

- ▪ **Archived** – select to mark course as *Archived* (see).

3. Click **SAVE.**

Permissions

The **Permissions** tab enables administrators to set the permissions for each course. This can also be done through the Security Manager accessed from the Administration Console.

NOTE: If permissions are not set at an individual course level, the course will adopt the permissions set at an overall Course level (in the Security Manager).

Only permissions relevant to courses will show on the Permissions tab (EDIT_COURSE_INFO and DELETE_COURSE_INFO). An example of the **Permissions** tab is shown in Figure 8.
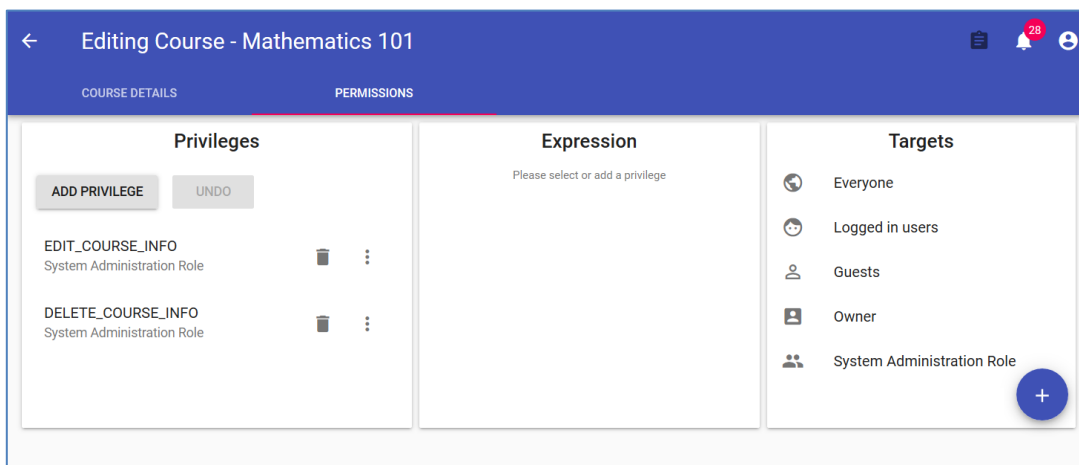
Figure 8 Permissions tab

The **Permissions** tab has the following three panels:

Privileges – displays configured privileges

Expression – displays expressions configured for a privilege. Targets are added to this panel to create an expression.

Targets – the users, groups, roles and other sources of users that may be granted or denied a privilege. This panel displays the recently used targets, but more can be added using the Add button.

To add a course privilege

1. From the course **Permissions** tab, click the **ADD PRIVILEGE** button. A dialog displays with the available privileges. An example is shown in Figure 9.
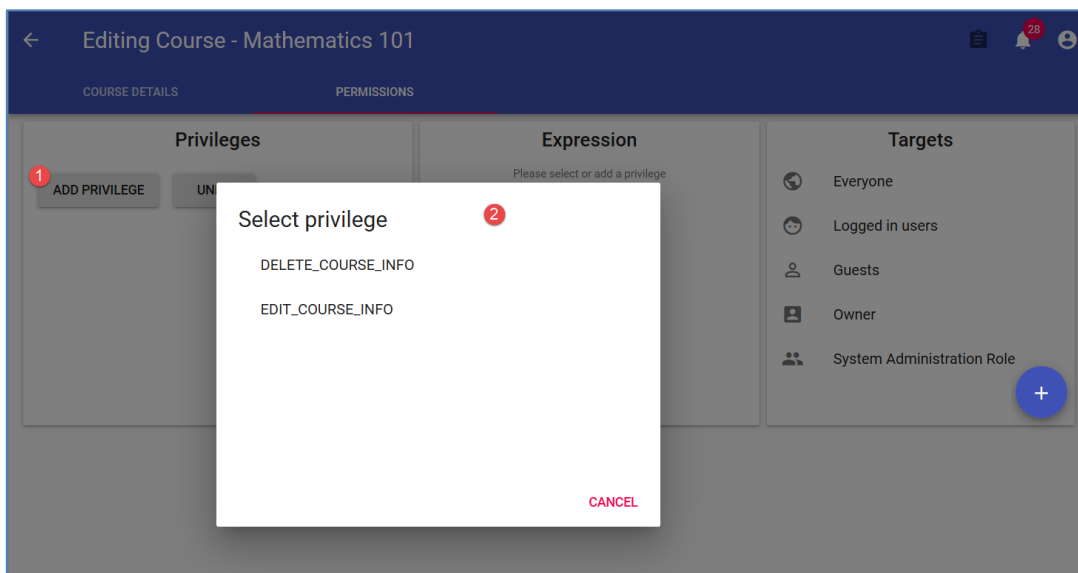

Figure 9 Add Privilege

2. Select the required privilege to be configured (e.g. *EDIT_COURSE_INFO*). The selected privilege displays in the **Privileges** and **Expression** panels. An example is shown in Figure 10.
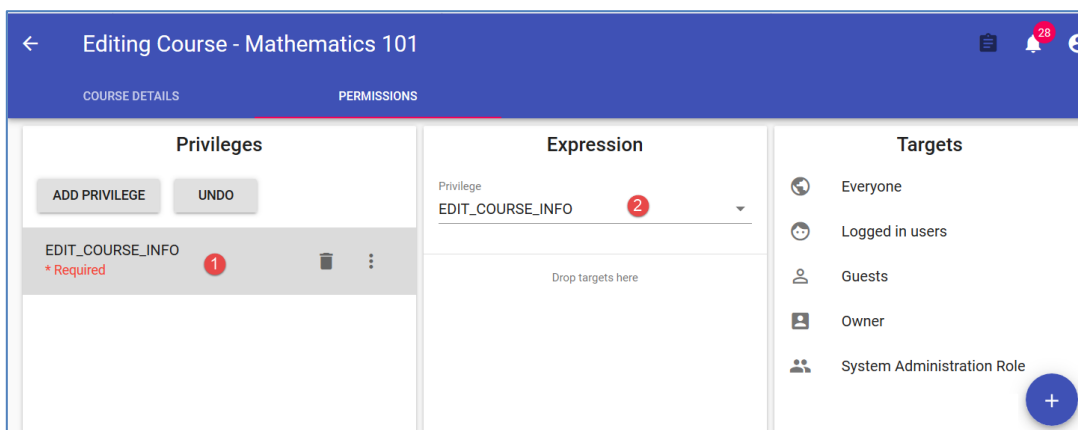

Figure 10 Selected privilege

NOTE: Multiple instances of the same privilege can be added with different expressions applied. Permission will be granted based on order (from top to bottom). The order of privileges can be rearranged by dragging and dropping into the desired order.

Targets

Targets are the users that can be added to an Expression to define who can and/or cannot carry out actions on objects, such as courses, in EQUELLA.

The **Targets** panel enables the targets to which the privilege expression will apply to be selected, such as specific users, groups or roles. Up to 10 recently used targets display in the Targets panel, and can be dragged and dropped into the Expression panel. An example is shown in Figure 11.
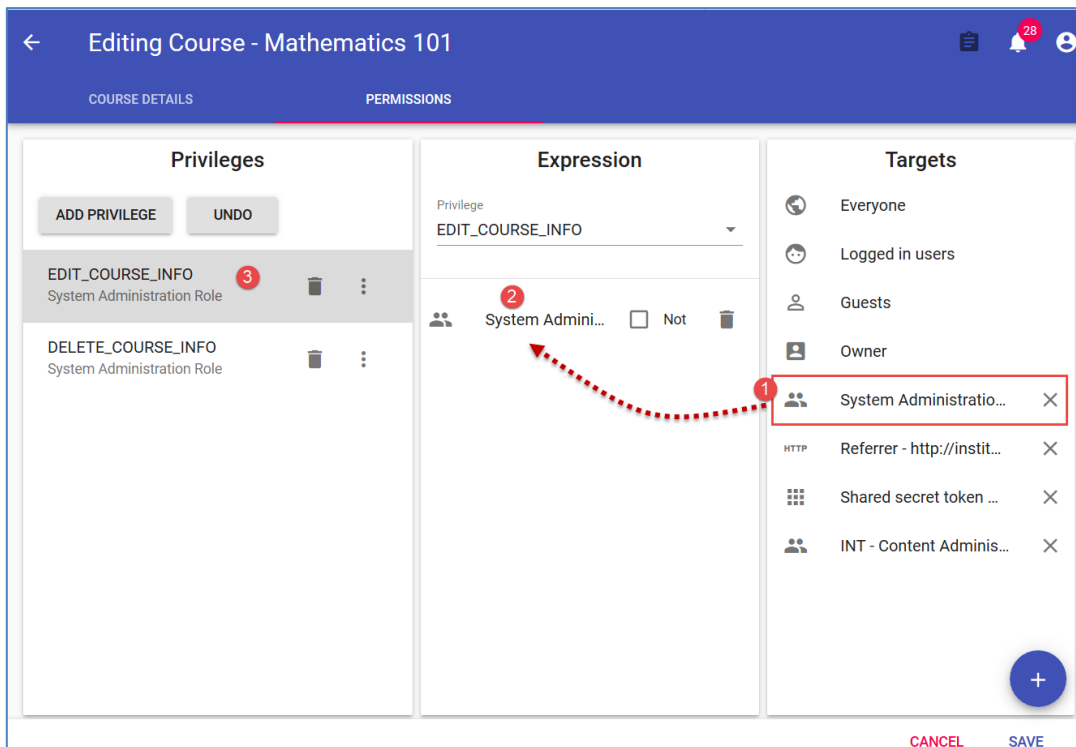
Figure 11 Drag and drop recently used target

Targets that have been added to the Targets panel can be removed by clicking the delete icon to the right of the target.

Targets that appear permanently in the Targets panel and can't be deleted are:

- **Everyone** – represents everyone who can access this instance of EQUELLA. This group includes everyone who can access an EQUELLA URL and comprises *Guest* and *Logged in* users.

- **Logged in users** - represents users who are logged into this instance of EQUELLA.

- **Guests** - represents users who can access the EQUELLA URL without logging in.

- **Owner** - represents the course owner, typically the course creator.

Targets not listed in the Targets panel can be selected by clicking the **Add** button. Types of targets that can be added are:

Users, groups and roles

1. Click the **Add** button then select the Users, Groups and Roles icon. An example is shown in Figure 12.
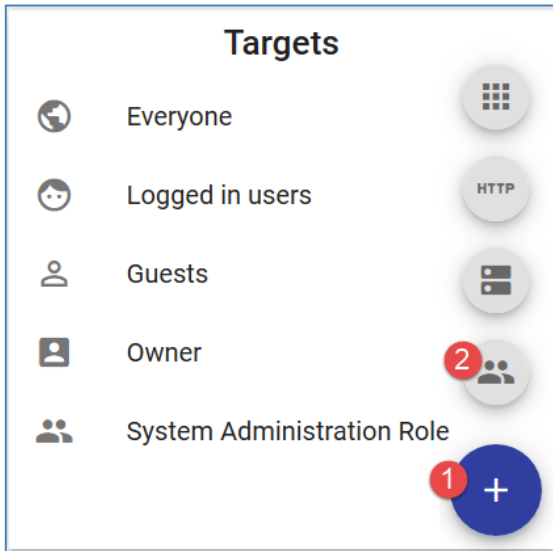
Figure 12 Add Users, Groups and Roles

The **Select User / Group / Role** dialog displays.

Enter a search term or click the search icon to view all users, groups and roles. An example is shown in Figure 13.
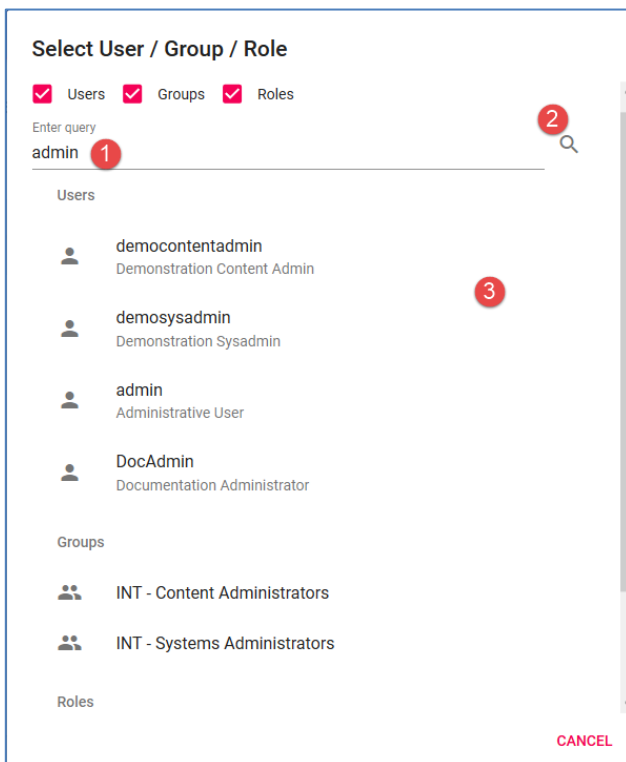
Figure 13 Select User / Group / Role dialog

NOTE: Search results can be further tailored by unchecking the unneeded groups. For example, if you are searching for Groups and Roles, uncheck Users at the top. An example is shown in Figure 14.
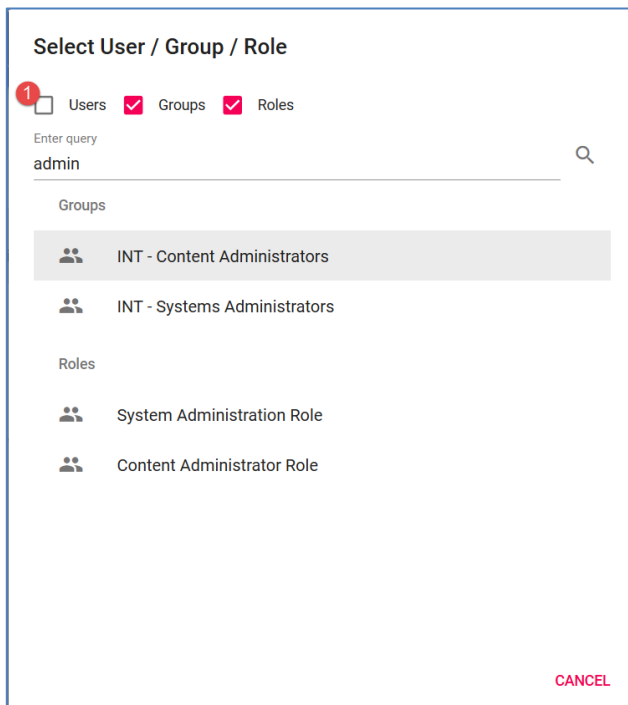
Figure 14 View only Groups and Roles

2.   Select the required target. On selection, the User, Group or Role is added to the Privileges, Expression and Targets panels. An example is shown in Figure 15.
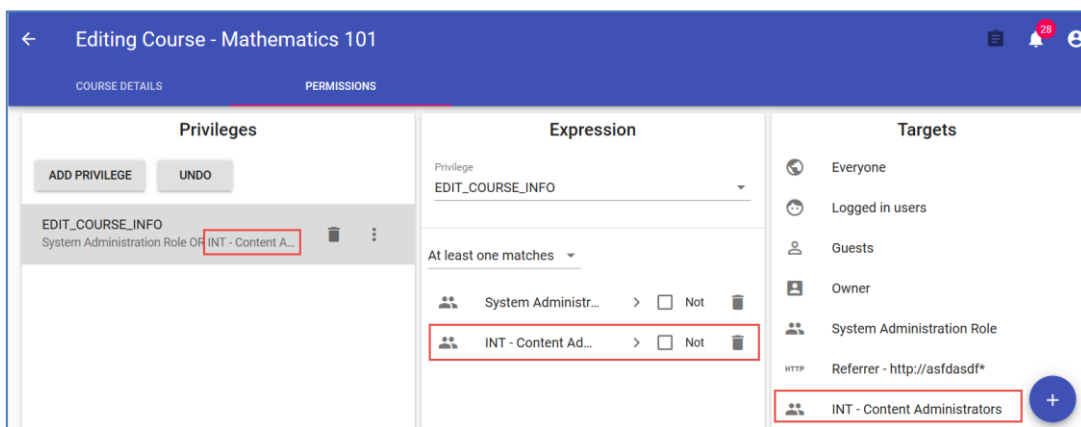
Figure 15 New target added to panels

IP Range

1.   Click the **Add** button then select the IP Range icon. An example is shown in Figure 16.
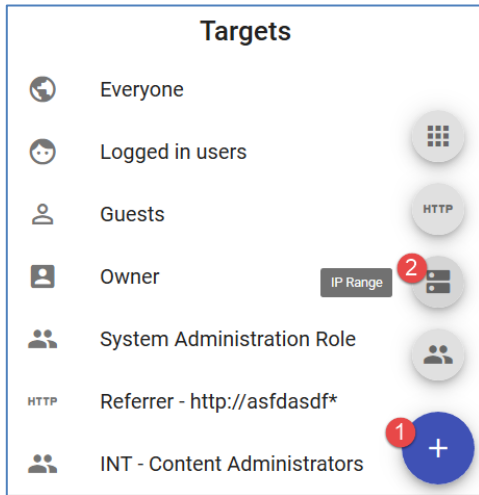
Figure 16 Add IP Range

2. The Select IP range dialog displays, as shown in Figure 17
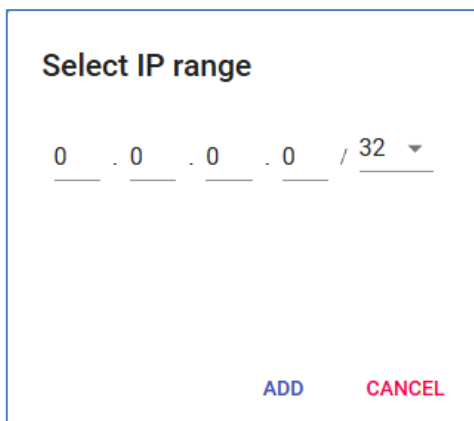
Figure 17 Select IP range dialog

3. Enter an IP address in standard 255.255.255.255 format and select a subnet mask in CIDR notation from the drop-down (*8, 16, 24 or 32*). The subnet mask represents the number of bits masked from the starting bit of the IP address. An example IP address and mask of *192.168.102.127/24* will allow access from IP addresses in the range 192.168.102.0 to 192.168.102.255.

4. Click **ADD**. The IP Range is added to the Privileges, Expression and Targets panels. An example is shown in Figure 18.
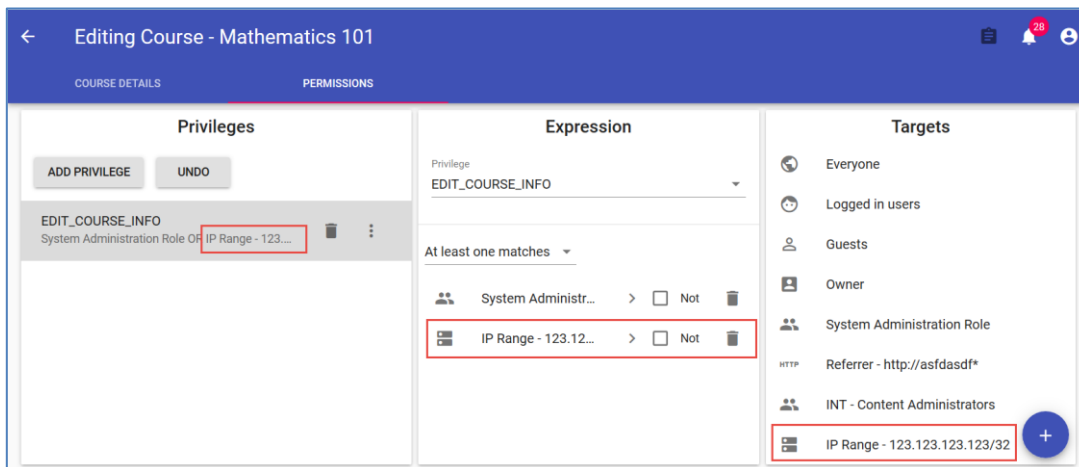
Figure 18 IP Range added to panels

HTTP Referrer

1. Click the **Add** button then select the HTTP Referrer icon. An example is shown in Figure 19.
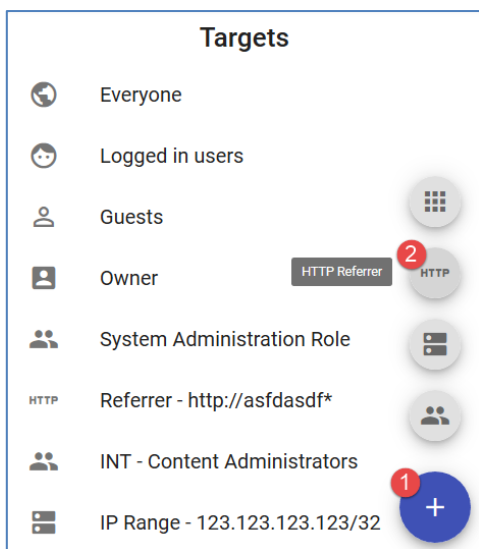
Figure 19 Add HTTP Referrer

2. The HTTP Referrer dialog displays, as shown in Figure 20.
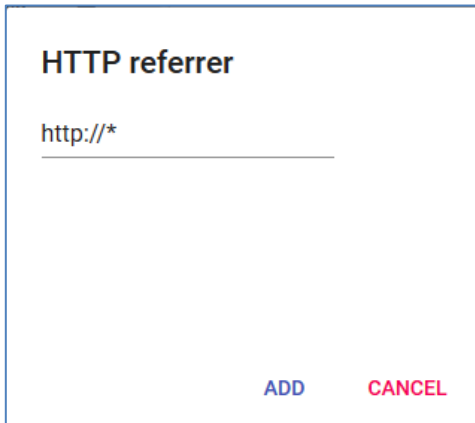
Figure 20 HTTP referrer dialog

3. Enter a text string that will be matched to the URL of the recipient. An exact address can be entered, or use the wild card to match referrers containing the value.

4. Click **ADD**. The HTTP referrer is added to the Privileges, Expression and Targets panels. An example is shown in Figure 21.
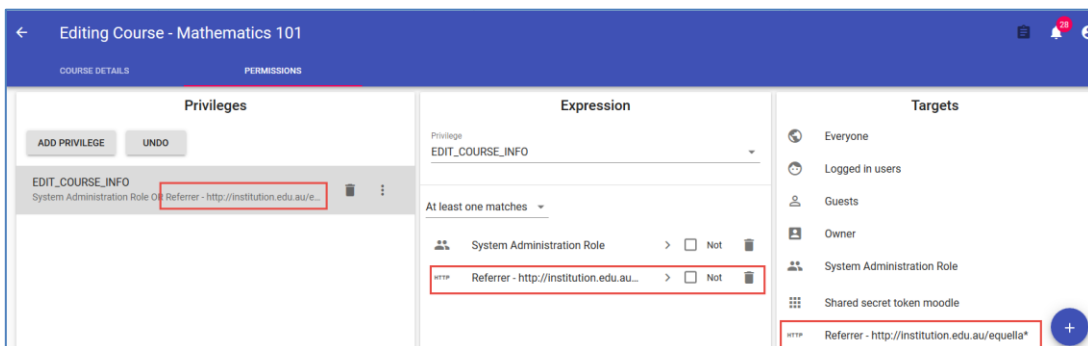
Figure 21 HTTP Referrer added to panels

Shared Secret

1. Click the **Add** button then select the Shared Secret icon. An example is shown in Figure 22.
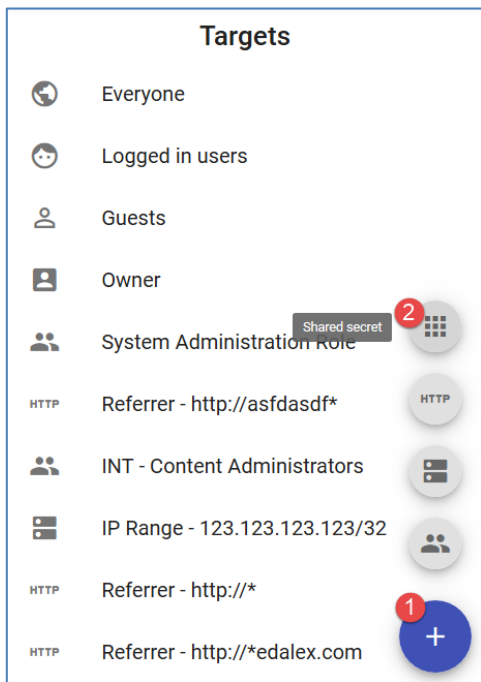
Figure 22 Add Shared Secret

2. The **Shared Secret** dialog displays, as shown in Figure 23.
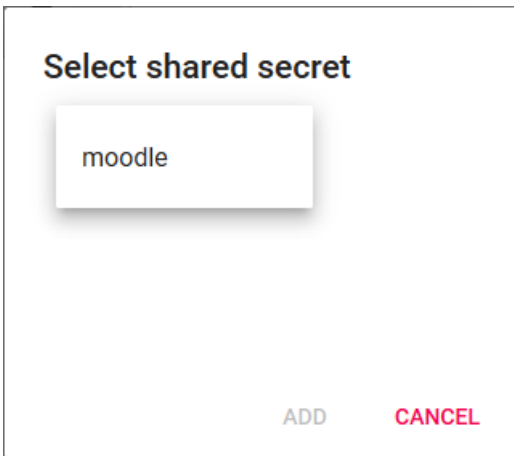
Figure 23 Shared secret dialog

3. Select the required shared secret from the drop-down (which displays any shared secrets configured in EQUELLA), then click **ADD**. The shared secret is added to the Privileges, Expression and Targets panels. An example is shown in Figure 24.
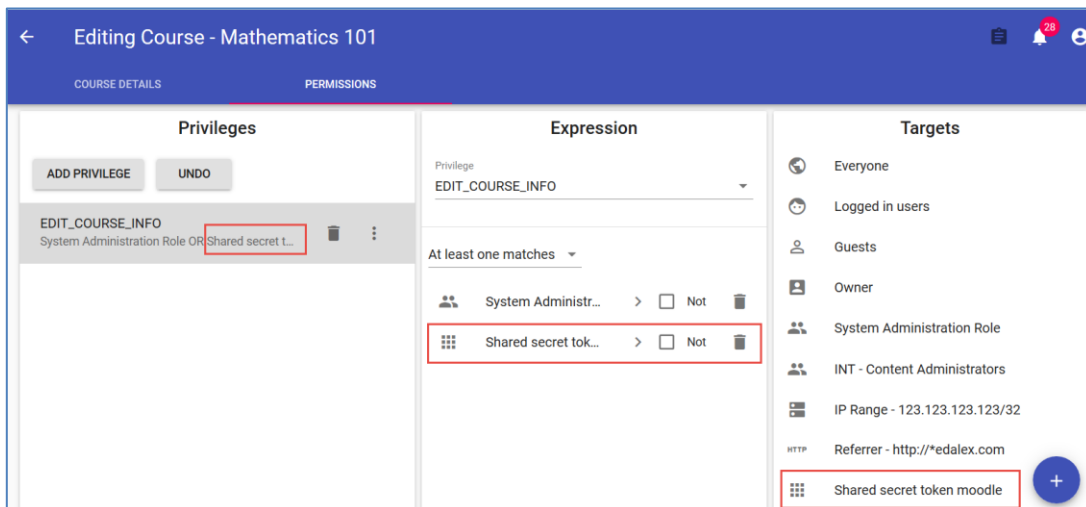
Figure 24 Shared secret added to panels

Configuring expressions

One target (e.g. System Administrator Role) can be added to the Expression pane, which grants only users that belong to that target (System Administrator role in this example) the privilege being set. If two or more targets are added, the default operator of **At least one match** is applied, but more advanced expressions can also be configured.

An example of an expression where a user must belong to either the System Administration role or the Content Administration group to edit a course is shown in Figure 25.
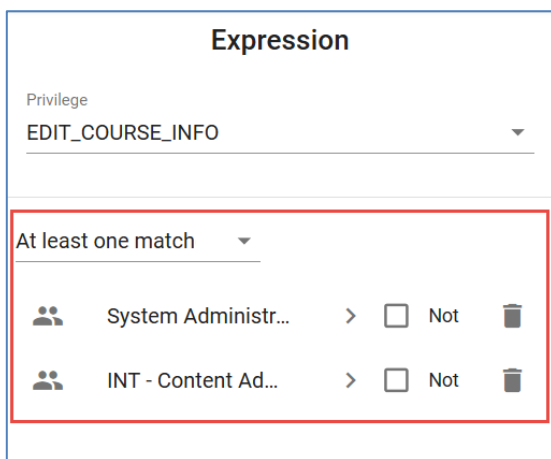

Figure 25 Simple 'At least one match' expression.

Creating advanced expressions

More complex expressions using groupings (expression operators) can be combined to create an expression of arbitrary complexity when a more sophisticated list is required.

Available group operators are:

- **At least one matches**—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.

- **All Match**—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.

- **None Match**—equivalent to the Boolean NOT (…OR….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 cannot use the associated privilege.

- **Not all match** – equivalent to the Boolean NOT (…AND….AND…) operator. When used at the top level of a user expression, a user belonging to all the user entities in this group cannot use the associated privilege.

To change a group operator, select the required operator from the drop-down list.

An example where a user would need to belong to both a *System Administration Role* and the *Content Administrator* group to edit the course is shown in Figure 26.
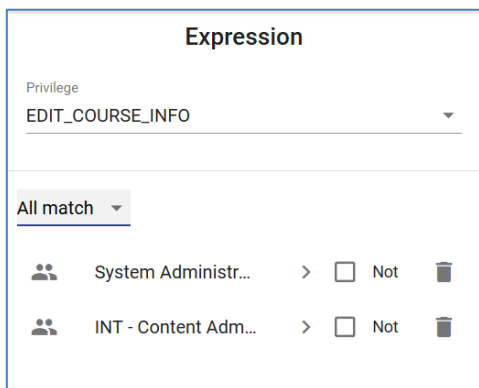
Figure 26 Example expression

Adding Groupings

To add a new grouping

1. Add the first target for the new group to the **Expression** pane.

2. Click the arrow to the right of the target to create the new grouping. An example is shown in Figure 27.
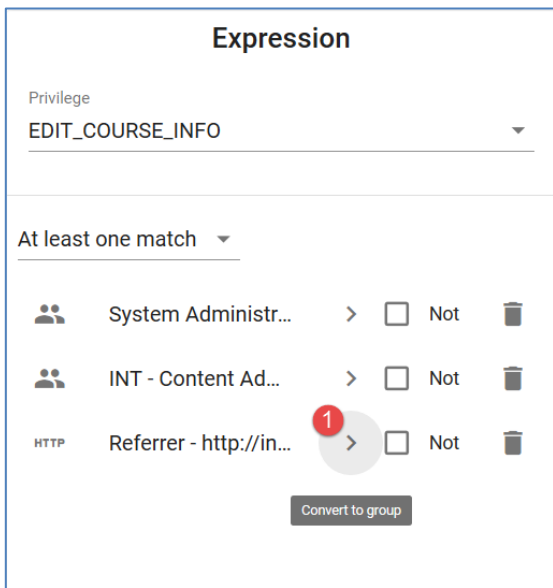
Figure 27 Create new grouping

3. The new grouping is created. An example is shown in Figure 28.
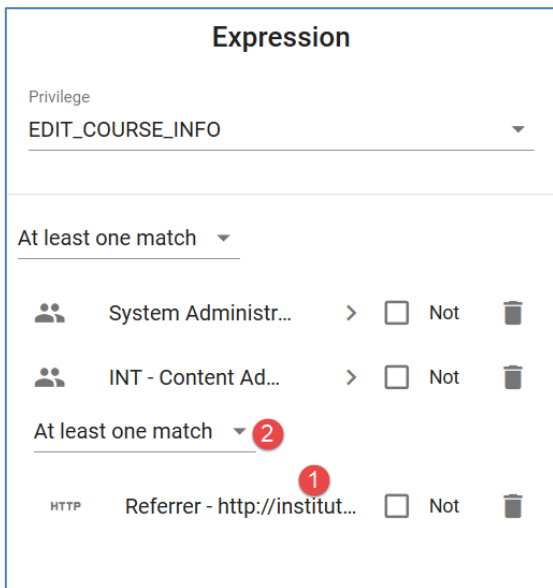

Figure 28 New grouping

4. Select the required operator from the drop-down and any further targets.

The example in Figure 29 show an expression set for a course which allows a user who belongs to either the System Administration role OR the Content Administrators group OR belongs to BOTH the defined Referrer AND Shared Secret to edit the course details.
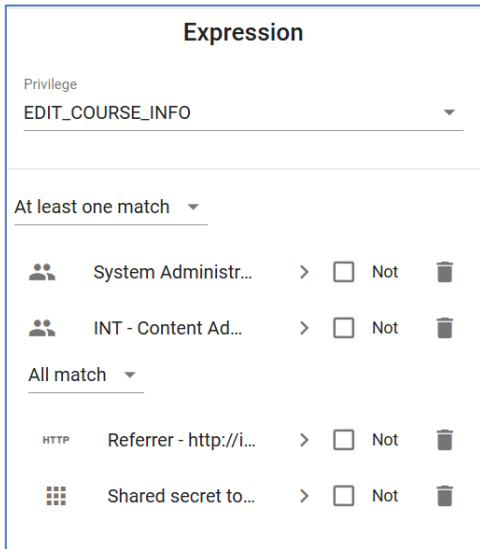
Figure 29 Example grouping rule

*NOTE: One or more targets within an Expression can have the privilege revoked by selecting the **NOT** checkbox.*

Revoking a privilege

A privilege and its associated expression can be revoked.

To revoke a privilege

1. In the **Privileges** panel, click the **More options** icon next to the Privilege to be revoked. An example is shown in Figure 30.
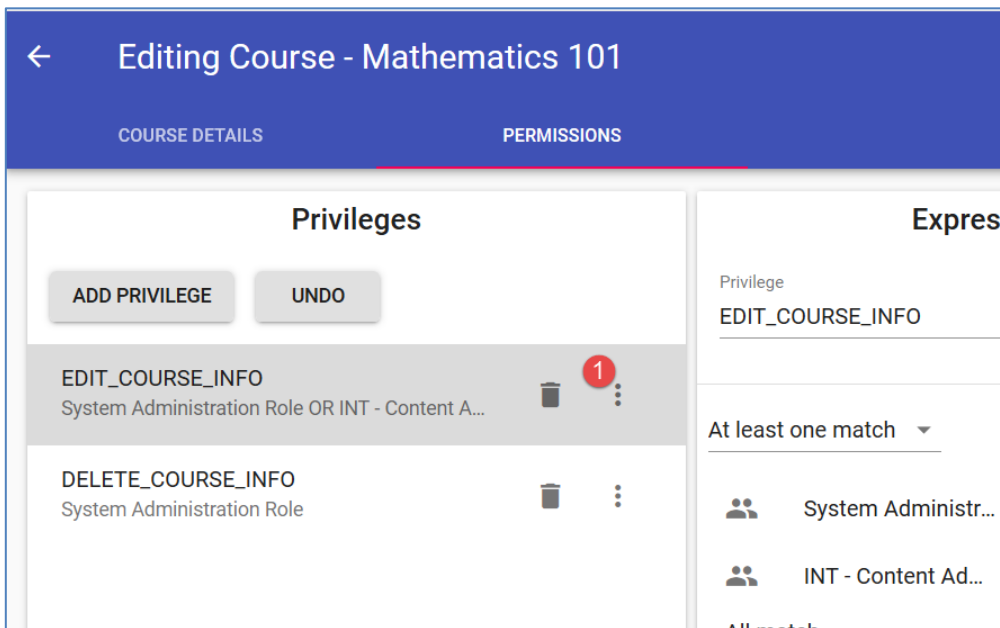
Figure 30 Privileges panel - More options icon

2. Select **Revoked.** The privilege is marked as *Revoked*. An example is shown in Figure 31.
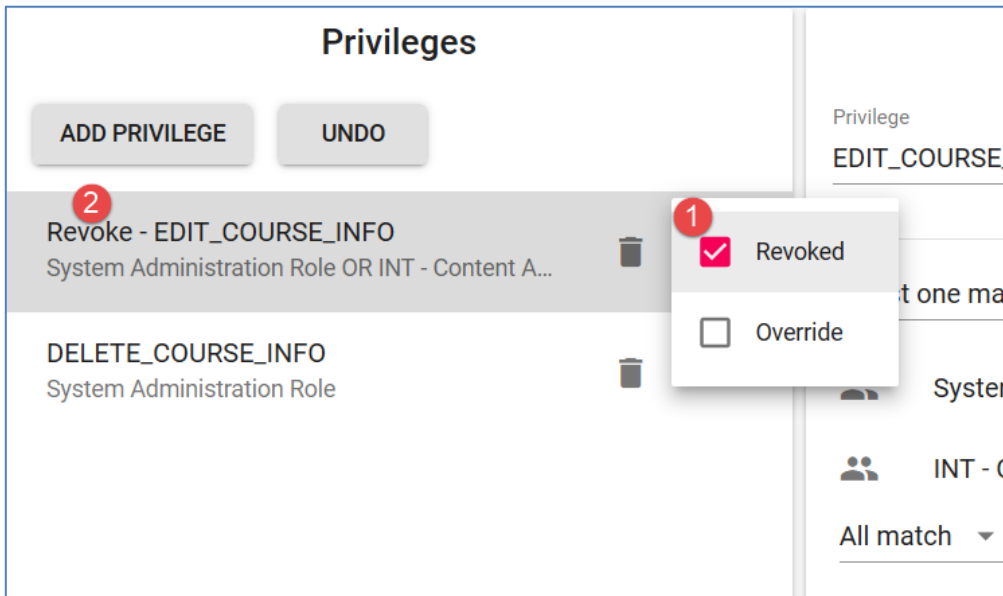
Figure 31 Revoked privilege

3. Click **SAVE**.

Editing a course

To edit a course

1. From the **Courses** page, click on the *Code and Name* link for the course to the edited. The **Edit Course** page displays. An example is shown in Figure 32.
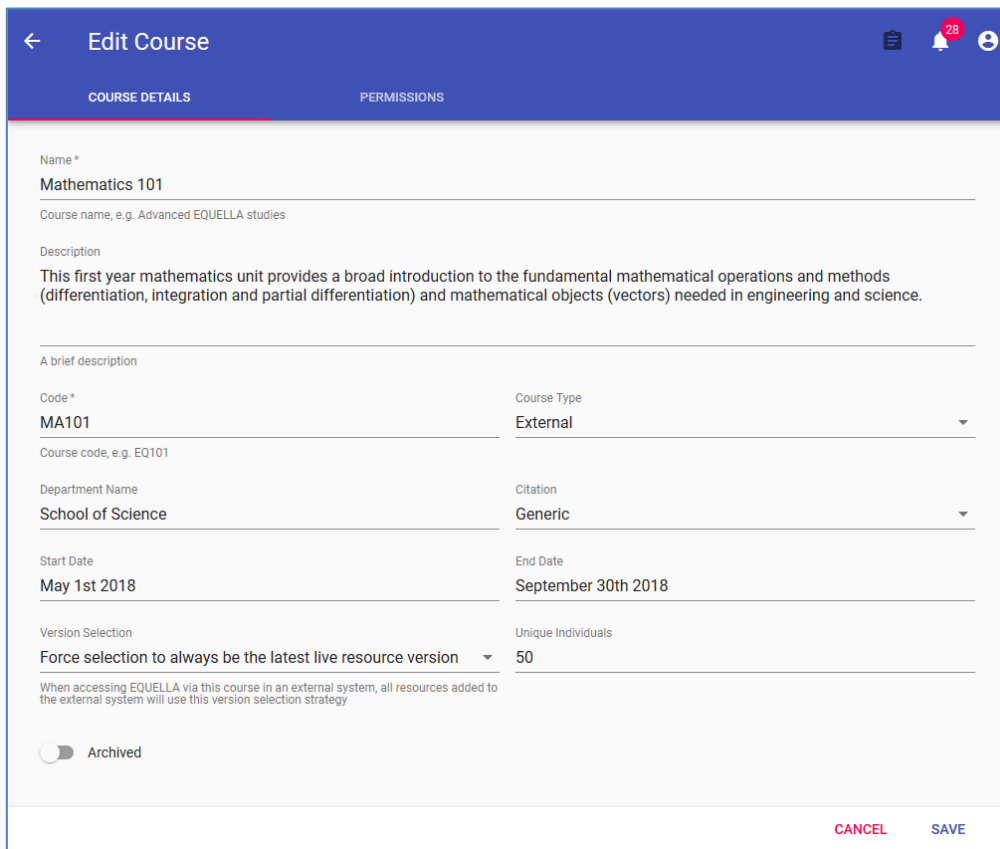
Figure 32 Edit Course page

2. Change the required details then click **SAVE.**

Deleting a course

To delete a course

1. From the **Courses** page, click the **Delete** icon to the right of the course to be deleted. An example is shown in Figure 33.
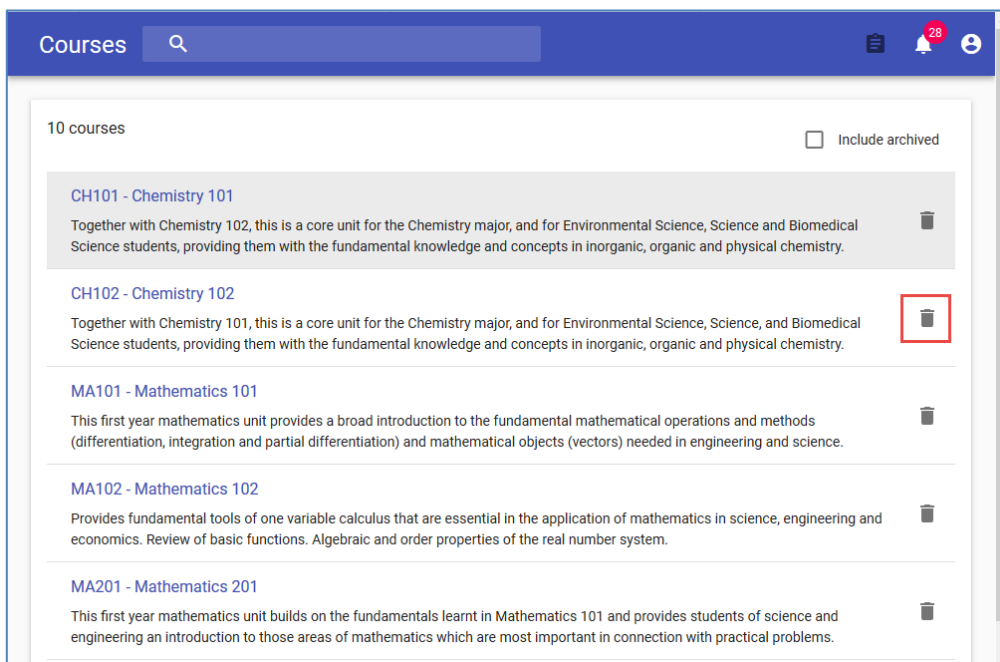
Figure 33 Course page - Delete icon

A confirmation dialog displays. An example is shown in Figure 34.
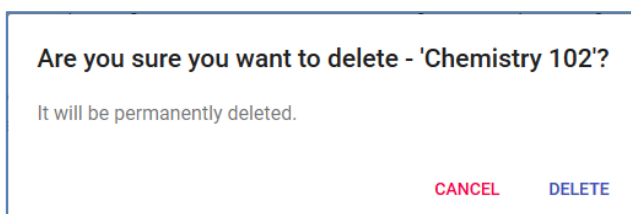
Figure 34 Confirmation dialog

2. Click **DELETE** to confirm deletion.

Viewing archived courses

To view archived courses

1. From the **Courses** page, click the **Include archived** checkbox in the top right corner. All archived courses will display in the results panel with **(Archived)** after the title. An example is shown in Figure 35.
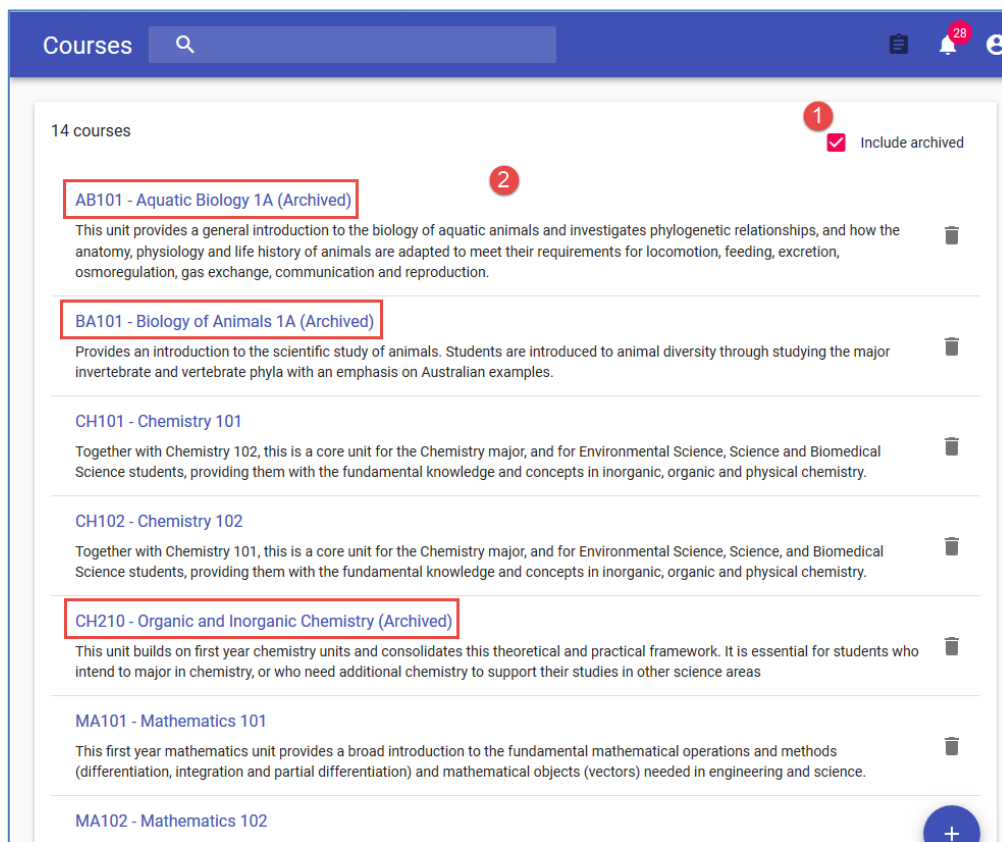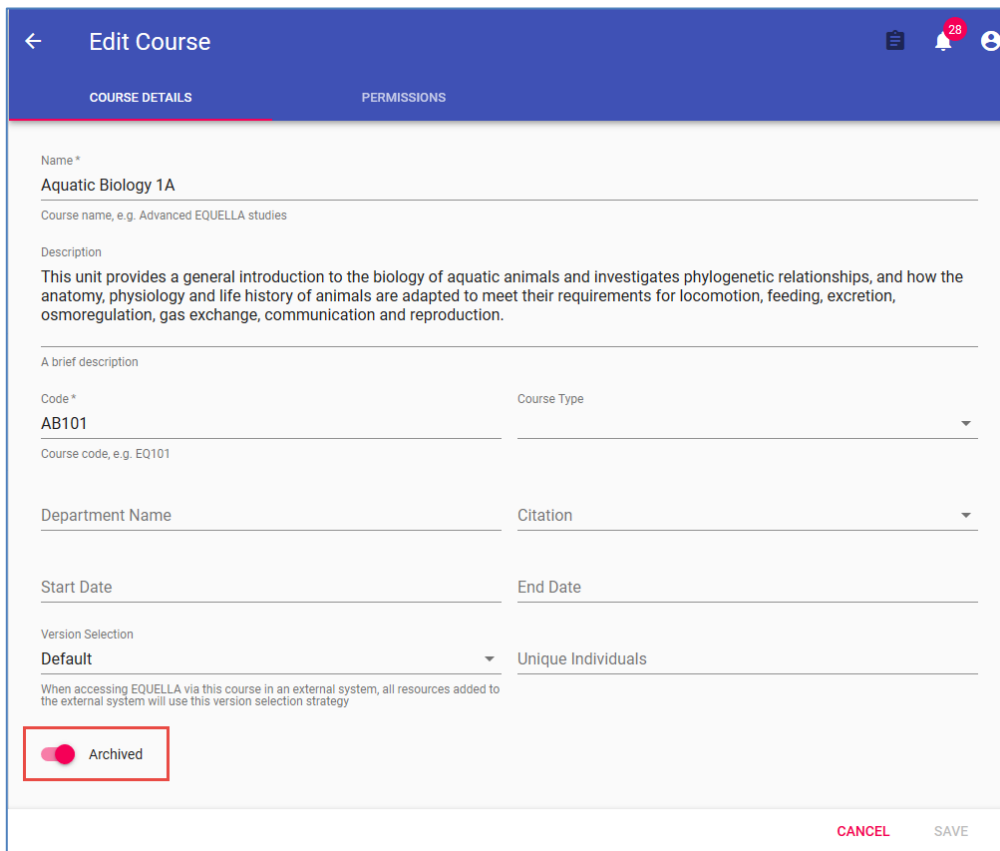
Figure 35 Display archived courses

Archiving a course

To archive a course

1. From the **Courses** page, click on the required course to open the Edit Course page.

2. Click the **Archived** button (changed to red) to set the course status to *Archived*. An example is shown in Figure 36.

Figure 36 Edit Course - Archived button

3. Click **SAVE.**

User Interface (UI) template & Search page prototype

EQUELLA 6.6 sees the introduction of a new, optional UI template. This template is based on Google Material Design methodologies and allows current EQUELLA pages to be used within a full screen frame.

A new Search page prototype is also available in EQUELLA 6.6. Elements of the current Search page have been brought into the new page, as well as the ability to create additional search facets based on selected metadata.

New UI template

The new UI template can be switched on and used with current EQUELLA pages. Advantages to using the new UI template include:

- Use of full screen

- Attractive Navigation menu

- New header

- Responsive design (screens rearrange themselves to fit different screen sizes)

NOTE: It is not recommended for institutions using customised CSSs to change to the new UI template at this point, as the customisations won't work with the new design.

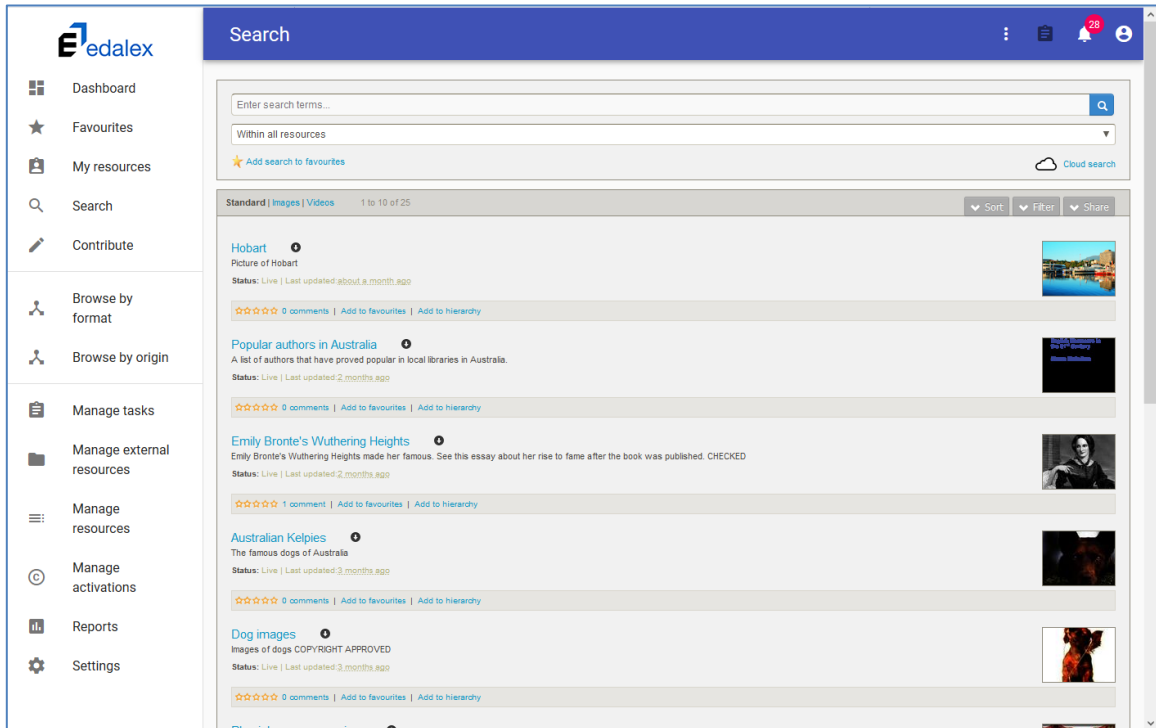An example of the Search page with the new UI template enabled is shown in Figure 37.

Figure 37 Search page in new UI template

To enable the new UI template

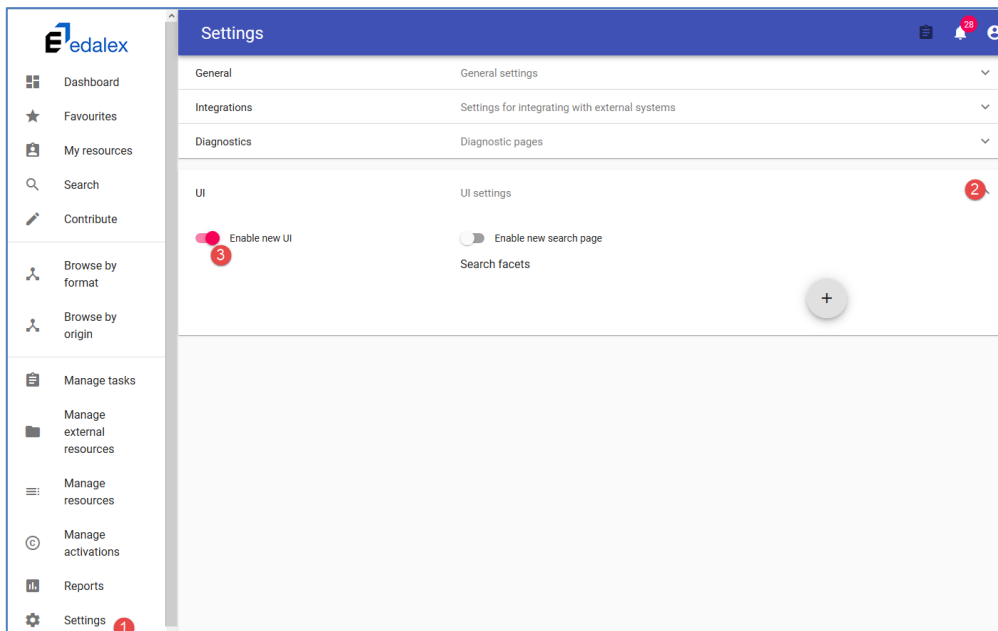1. From **Settings**, select **UI** then **Enable new UI**. An example is shown in Figure 38.

Figure 38 Settings – UI settings

NOTE: A page refresh may be required before the new template is applied.

Search page prototype

A new Search page has been developed, using new UI methodologies that are modern, fresh and pleasing to the eye and includes infinite scrolling, replacing the current pagination model. Partial functionality has been applied to the prototype, with the balance to be added in the near future.

Part of the new functionality added to the prototype is the ability to configure customised facets based on metadata stored in EQUELLA for filtering purposes on the Search page.

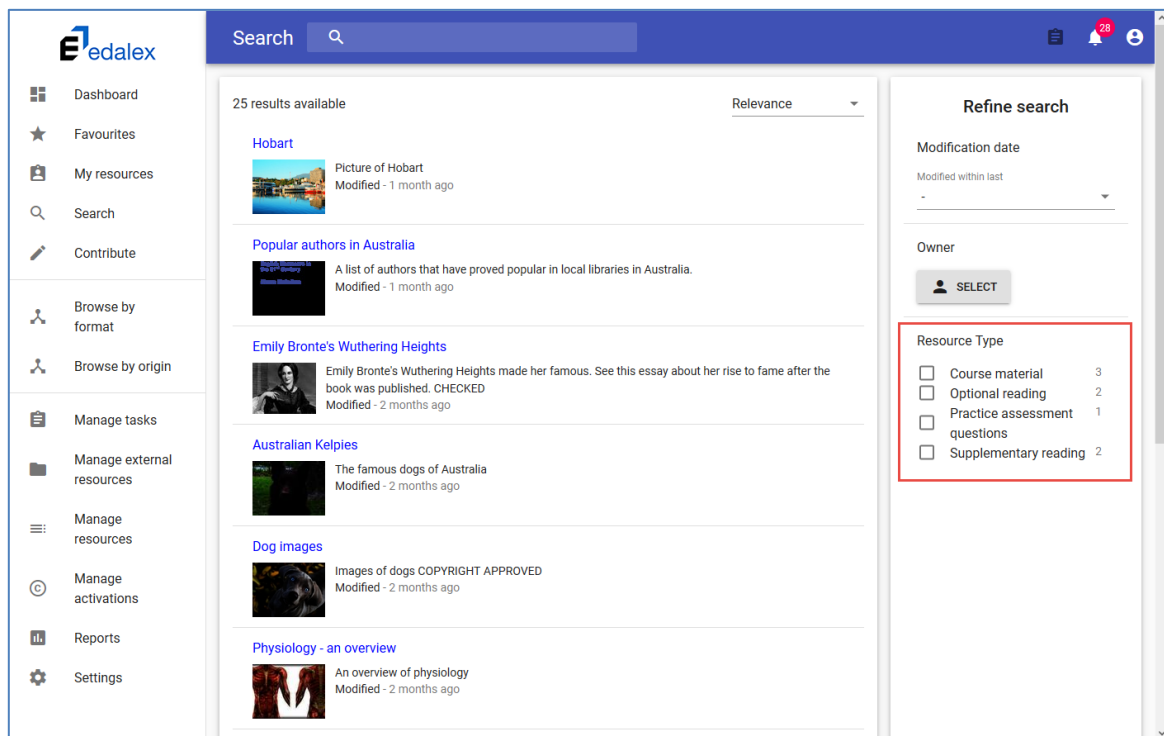An example of the new Search page, with a configured facet filter is shown in Figure 39.

Figure 39 Search page prototype

To enable the Search page prototype

1. From **Settings**, select **UI, Enable new UI** (if not already enabled), then **Enable new search page**. An example is shown in Figure 40.
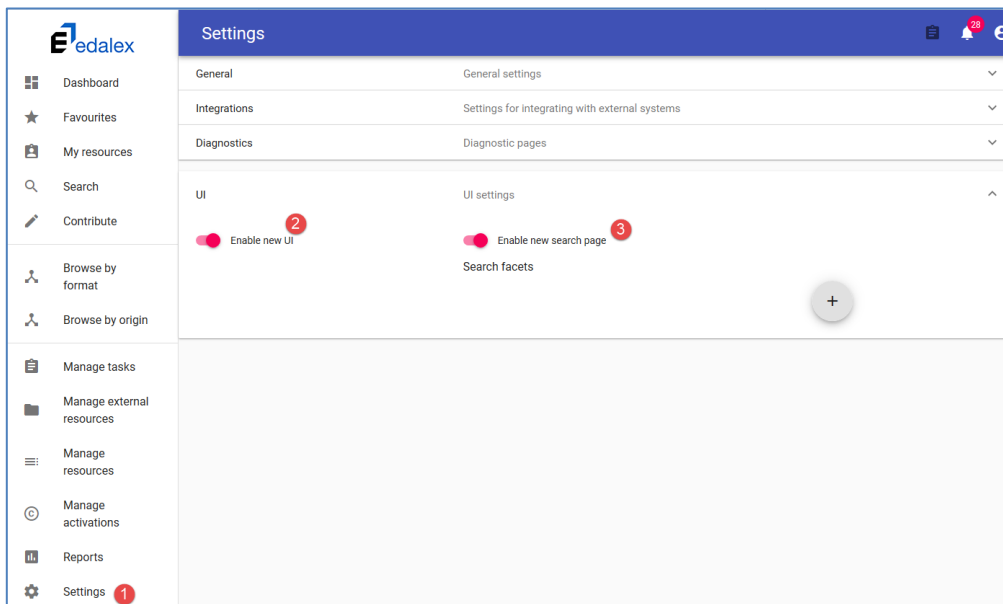
Figure 40 Enable Search page prototype

NOTE: A page refresh is required before the new search page is applied.

Adding Search facets

Search facets can be configured, and display in the right hand panel of the new search page. These are based on metadata nodes existing in the metadata schema, and the schema path is required for configuration.

To add a facet to the search page

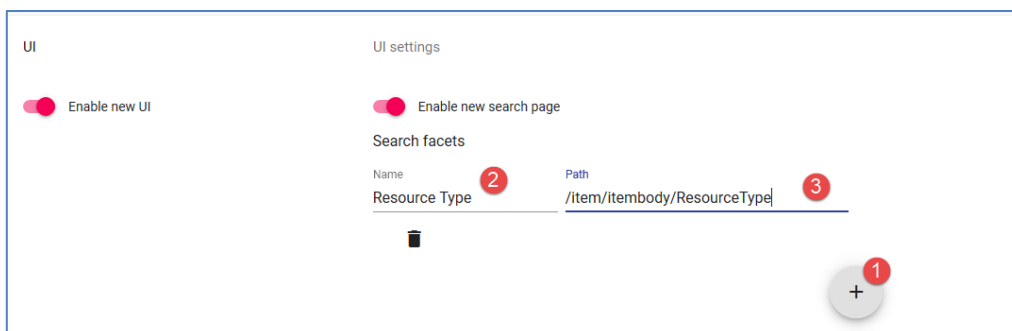1. From **Settings**, select **UI** then click the **Add** button. An example is shown in Figure 41.

Figure 41 Settings - UI - Add facet

2. Enter the **Name** to appear as the filter label on the search page (e.g. *Resource Type*).

3. Enter the metadata node **Path** (note this is case sensitive).

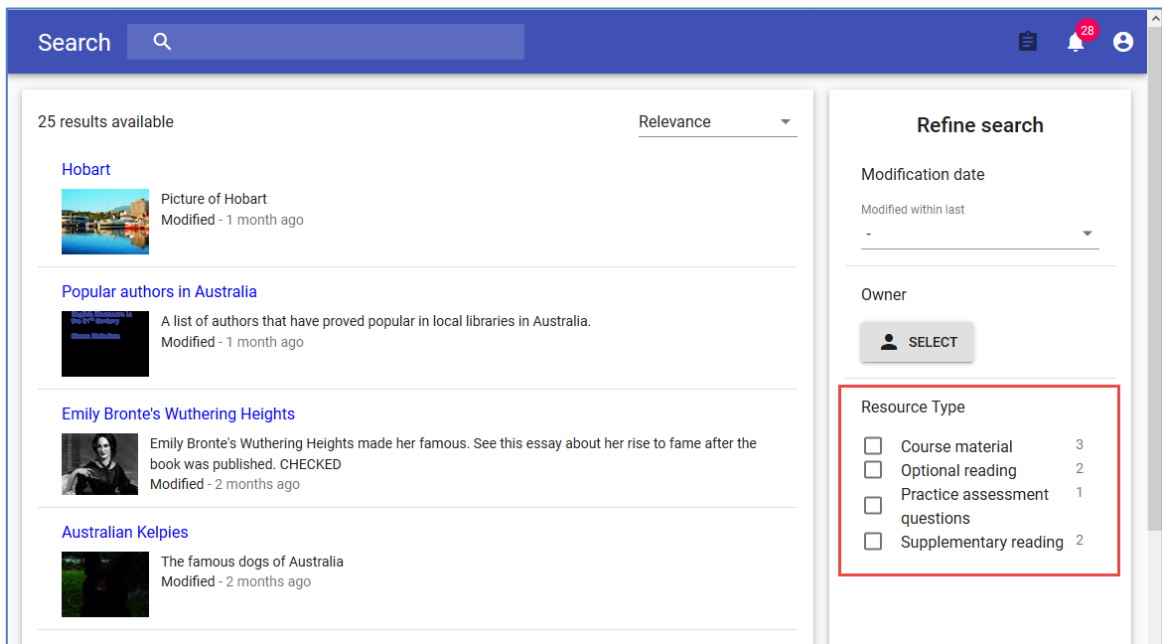The facet now shows in the filter panel on the new search page. An example is shown in Figure 42.

Figure 42 Facet filter on Search prototype page

Multiple facet filters can be added by clicking the **Add** icon.