

EQUELLA user guide for Monash University

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A brief introduction to EQUELLA

EQUELLA is a digital repository that provides a central platform on which to house Monash University's teaching and learning content. EQUELLA is currently in use in a wide range of schools, universities, colleges, TAFEs, departments of education, government agencies, and corporations worldwide. One instance of EQUELLA is in fact already being used at Monash University by the Faculty of Medicine, Nursing and Health Sciences, and the library.

Why are we implementing EQUELLA at Monash University?

EQUELLA is being implemented at Monash University to allow us to establish a central location for teaching content and to help overcome some of the limitations of file management in Moodle.

Some of the benefits of implementing EQUELLA include:

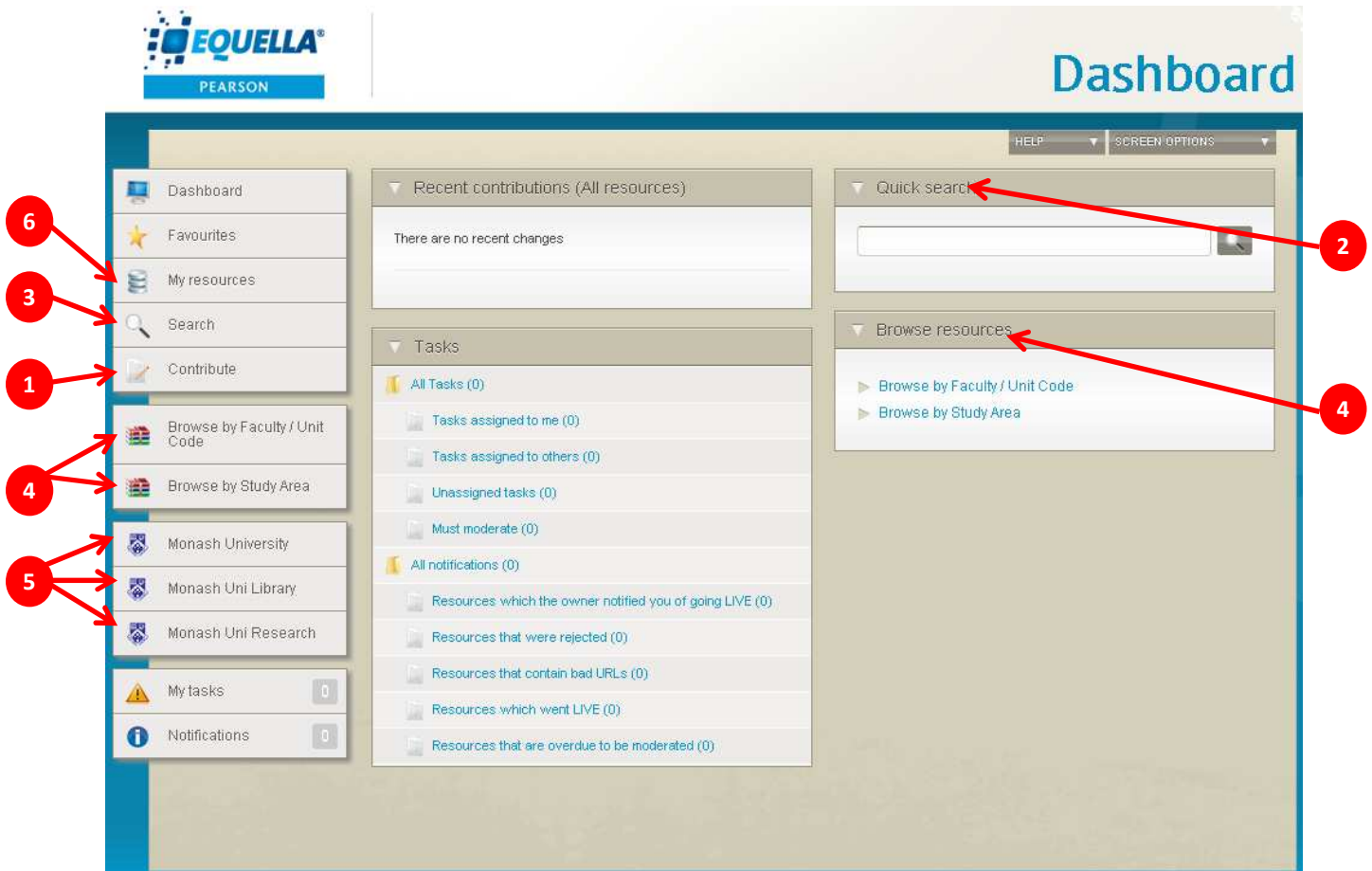
- Increased capacity for learning materials to be shared/ reused amongst academic staff across the University
- Reduced time and effort required to search for/ find a particular resource or file
- When uploading a resource/ file to EQUELLA, staff are required to enter some basic metadata about it (ie. A brief description of the item, units/ course to which the item might be relevant, etc), making it easier for other staff to search for and locate an appropriate resource/ file
- Single 'point of truth' for learning and teaching objects

EQUELLA and your obligations

As Monash staff, you need to be mindful of your rights and responsibilities around issues such as copyright and privacy in relation to EQUELLA. If you're not sure about the copyright status of an item you'd like to upload, please visit <http://copyright.monash.edu.au/>.

Log into EQUELLA

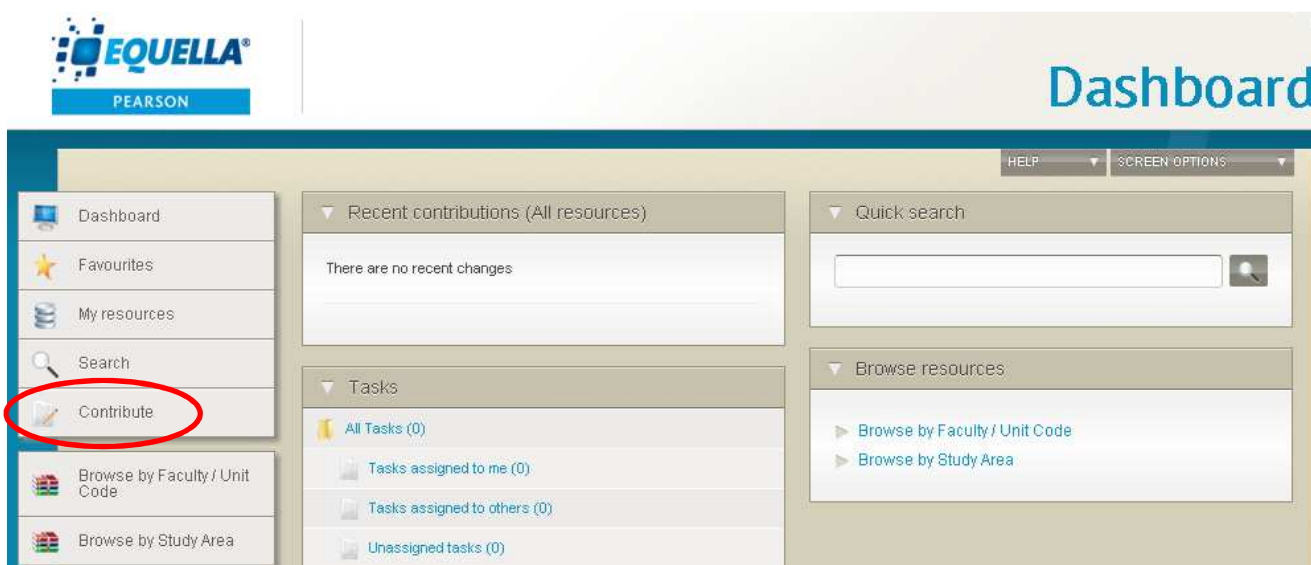
1. Open your web browser and enter the URL for Monash University's EQUELLA interface (URL provided via email)
2. Enter your authcate username and password, and click **Log in**
3. The EQUELLA dashboard will appear in your browser - the key elements of the dashboard are highlighted below:



1	Contribute	Click here when you want to add a resource to EQUELLA
2	Quick search	Use the Quick search function when you want to do a quick keyword search for resources in EQUELLA
3	Search	Click here when you want to do more advanced searching (eg. Searching for a resource within a particular University collection, with a particular owner, of a particular file type, etc.)
4	Browse resources	Enables you to browse through the EQUELLA resources by Faculty, unit code or study area
5	Useful websites	Click here to be taken to the various external Monash University websites listed
6	My resources	Click here to see a full listing of the resources you own within EQUELLA

Add a resource to EQUELLA

1. From the EQUELLA dashboard, click **Contribute**:



2. If you have access to multiple collections, you will need to select the collection to which you want to contribute the new resource. Otherwise, proceed to step 3
3. The EQUELLA contribution wizard will appear, prompting you to enter information about the resource you are adding. Mandatory fields are those with an asterisk (*) beside their title:

About the Monash resource (required fields)

Title *
Please enter a title for this item (words in the title have a high search rank)

Author of the resources *
Please choose the author for this resource

I am the author Monash staff External authors

Description /Keywords *
Please enter a short description or keywords which will be displayed with the item

Your contribution wizard will contain a unique combination of mandatory and optional fields. Please consider the following when completing these selected fields in the contribution wizard (and please note that not all of the fields described below will appear in your contribution wizard):

Field	Description	Tips/ Hints for completion
Author of the resource	Individual(s) who developed/ wrote the resource. The resource can have one or many authors, internal and external to Monash University.	EQUELLA will automatically assume that you are the one and only author of the resource. Change/ Add other authors as necessary.
Description/ Keywords	A means of telling other EQUELLA users what the resource contains or is useful for.	Keep it simple.
Unit code/ Course code/ Faculty wide#	Units or courses to which the resource is relevant.	Select all units and courses for which the resource is relevant. If the resource is fairly general in nature, consider selecting Faculty wide instead.
Discipline/ Area of Study#	Disciplines/ Areas of study relevant to the resource.	Select all disciplines/ areas of study relevant to the resource being contributed. If the resource is fairly general in nature, you can keep this field blank.
Access	Group that will have access to the resource once it has been published in EQUELLA. Those granted access under the All of Monash and My faculty options will be given view access to the resource; those granted access under the Owners and Collaborators only option will be granted both view and edit access	Default will be My Faculty . If you believe the resource would be valuable to other faculties, consider selecting All of Monash instead. For more information on the Owners and Collaborators only option, please see Restrict access to a resource in EQUELLA section of this document.
File Upload	Where any attachments/ files are to be uploaded.	Consider whether it is appropriate to upload multiple files to a single EQUELLA resource. For example, you may wish to upload both the Microsoft PowerPoint and Adobe PDF versions of lecture notes to the one resource. Your decision will largely depend on whether you will be allowing students access to the whole resource or just a single file within the resource via Moodle (see Appendix B for further information)
Semester	Semester for which this resource is relevant.	
Resource type#	Assessment, case study, lecture notes, unit guide, etc.	
Notes and other fields	A field in which to capture details about the resource that could not be captured elsewhere in the contribution wizard. In this space, you can record information regarding the	Do not use this field as a substitute for any of the fields listed above and keep it simple (eg. Theme=mathematics; Suitable for accreditation).

	resource's intended audience, language, associated graduate attributes or discipline/ area of study to which it is relevant. You can also capture general notes about the resource.	
--	---	--

For these items, you can make multiple selections. Start typing the name of the relevant unit, course, area of study, etc. into the field, select the item from the dropdown list that appears and hit **Enter**:

Unit code / Course code / Faculty wide *

Unit code Course code Faculty wide

Unit code *

fit10

FIT1001 - Computer systems - FACULTY OF INFORMATION TECHNOLOGYFIT1001 - Computer systems

FIT1002 - Computer programming - FACULTY OF INFORMATION TECHNOLOGYFIT1002 - Computer programming

FIT1003 - IT in organisations - FACULTY OF INFORMATION TECHNOLOGYFIT1003 - IT in organisations

FIT1004 - Data management - FACULTY OF INFORMATION TECHNOLOGYFIT1004 - Data management

FIT1005 - Networks and data communications - FACULTY OF INFORMATION TECHNOLOGYFIT1005 - Networks and data communications

SELECT

SELECT

Repeat this for each relevant unit, course, discipline/ area of study, etc.

To delete a selection, click the **x** corresponding to that selection:

Unit code / Course code / Faculty wide *

Unit code Course code Faculty wide

Unit code *

SELECT

FIT1001 - Computer systems

x

4. Use the **Next** and **Previous** buttons at the bottom right of your screen to navigate through the contribution wizard
5. When you have completed all necessary fields, click the **Save** button at the top right of the contribution wizard:

Additional metadata (optional)

Save

Preview | Cancel

NB. If you do **not** want to save the EQUELLA resource, click **Cancel** (below the **Save** button)

6. If you are ready to publish your resource, click **Publish**
7. If you would prefer to come back and publish it later, click **Save draft**

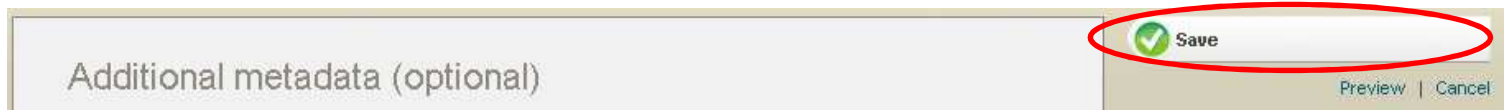
Restrict access to a resource in EQUELLA

As mentioned in the [Add a resource to EQUELLA](#) section, when contributing a new resource, the contribution wizard asks that you enter information about the resource. One of the required fields is “Access” where you are asked to select the group that will have access to the resource once it has been published in EQUELLA.

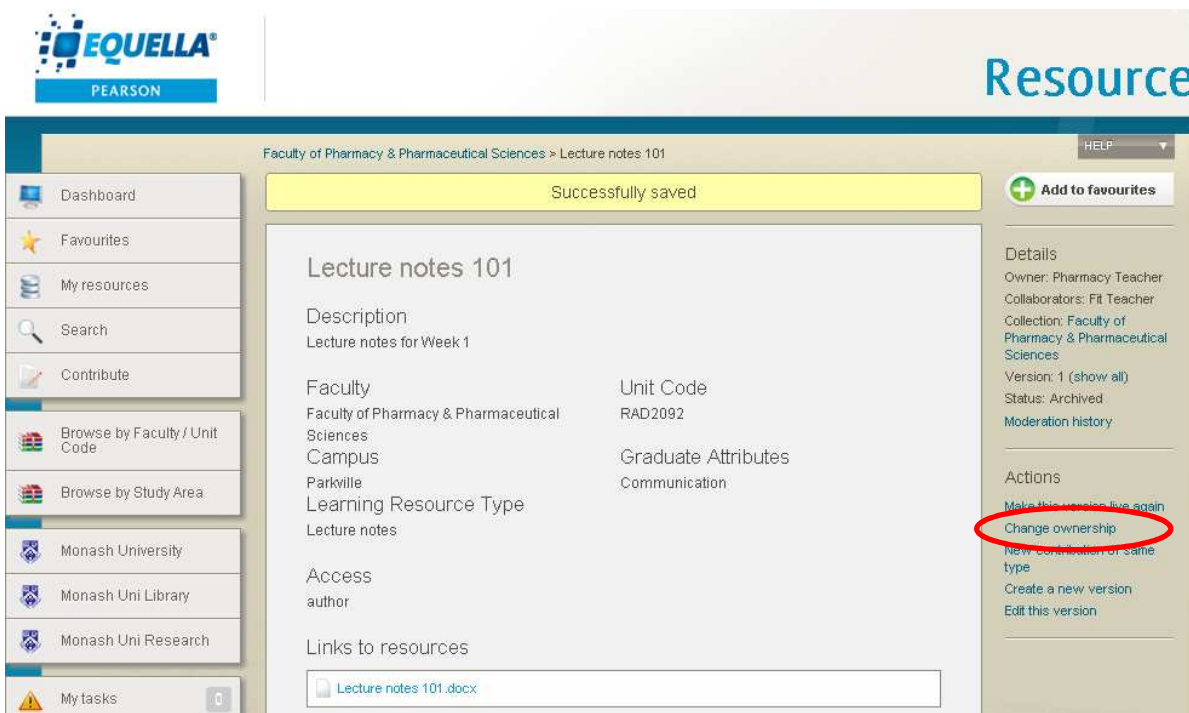
If you are happy for the resource to be *viewable* by all of Monash, select the **All of Monash** option; if you would prefer *view* access to be restricted to staff within your Faculty, select the **My Faculty** option.

If you wish to restrict *view* and *edit* access to yourself and a select few, you will need to undertake the following:

1. When adding metadata for your new EQUELLA resource, select the **Owners and Collaborators only** option under ‘Access’ and proceed to complete the remaining contribution wizard fields as required
2. When you have completed all necessary fields, click the **Save** button at the top right of the contribution wizard:



3. Navigate to the **Actions** list and click the **Change ownership** link on the right of your screen:



4. Navigate to the **Collaborators** section and click the **Add collaborators** link:

Faculty of Pharmacy & Pharmaceutical Sciences > Lecture notes 101 > Owner and collaborators

- Dashboard
- Favourites
- My resources
- Search
- Contribute
- Browse by Faculty / Unit Code
- Browse by Study Area
- Monash University
- Monash Uni Library

Owner and collaborators

Owner

Pharmacy Teacher
Change

Collaborators

There are currently no collaborators

+ Add collaborators

Add to favourites

Details

Owner: Pharmacy Teacher
Collection: Faculty of Pharmacy & Pharmaceutical Sciences
Version: 1 (show all)
Status: Archived
Moderation history

Actions

Make this version live again
Change ownership
New contribution of same type
Create a new version
Edit this version

5. Start typing the surname of the first individual you would like to grant access to the EQUELLA resource to and hit **Enter**
6. Select the individual's name from the dropdown list that appears and click the **Select these users** button:

Select collaborators

Select user(s)

Share ownership of this item by choosing one or more collaborators. The search query can contain a name (first, last or login) and a wildcard character (*).

- Emily Bond [ebond]**
- Marie Bond [mariebo]**
- Molly Bond [bondm]**
- Nicholas Bond [nickbond]**

<

>

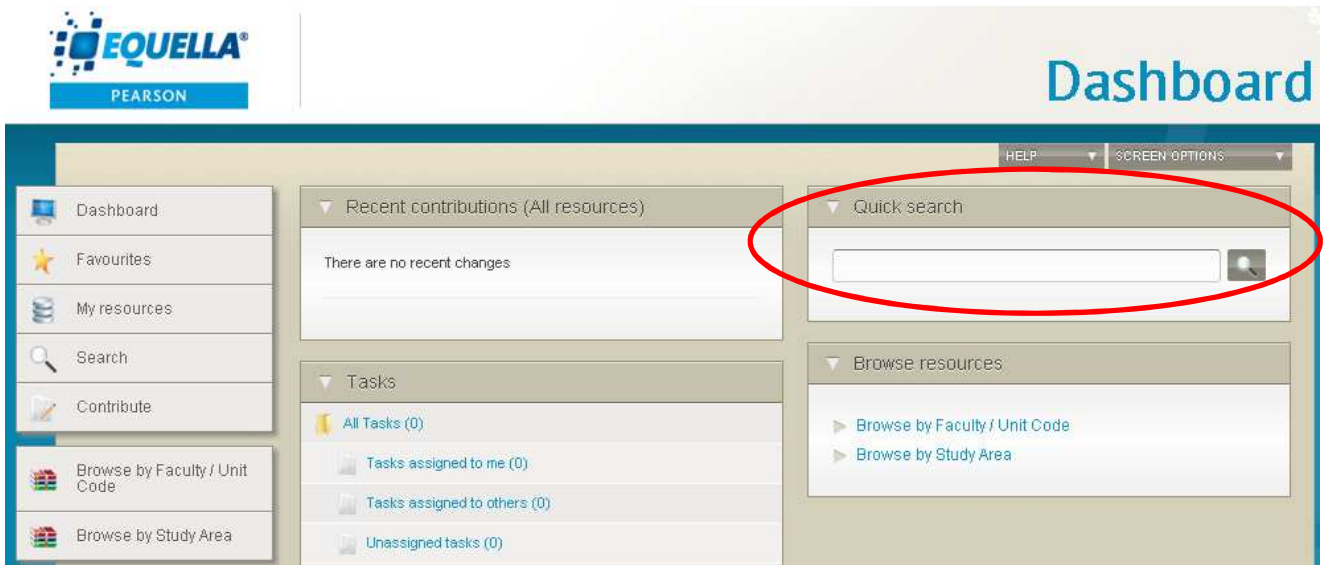
SELECT THESE USERS
CANCEL

7. Repeat steps 4 – 6 for each of the individuals you would like to grant access to the EQUELLA resource to
8. Return to the EQUELLA dashboard by clicking on the **Dashboard** link in the top left of your screen

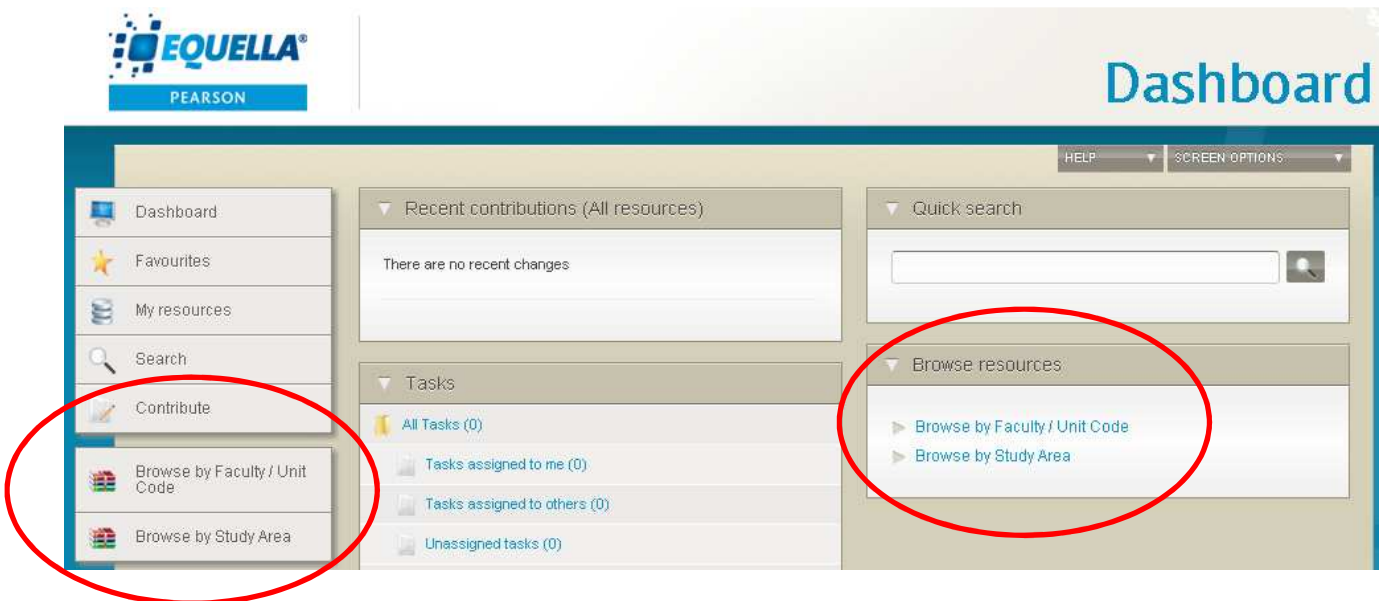
Search for a resource in EQUELLA

There are several ways in which you can search for a resource in EQUELLA:

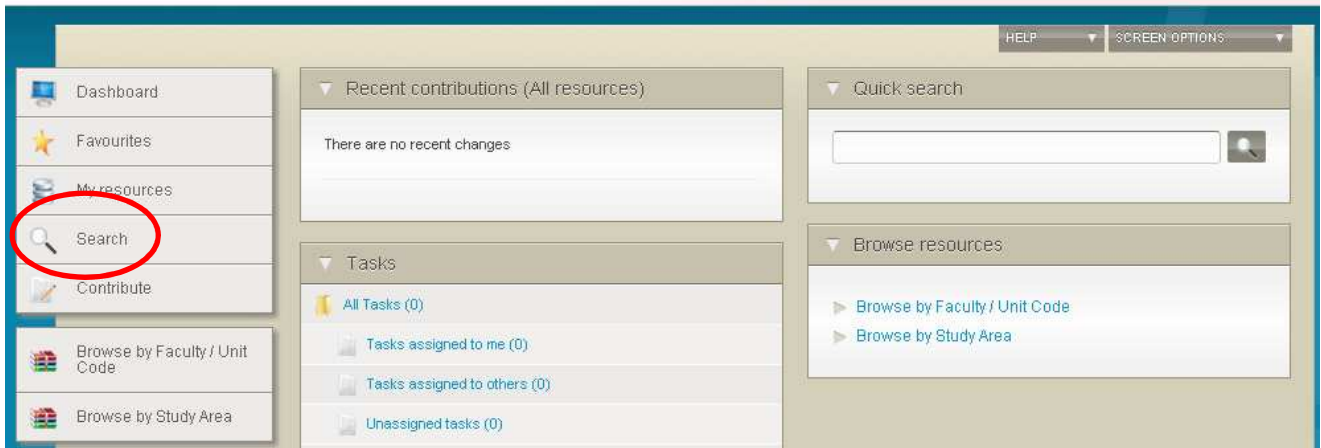
- You can do a quick search by entering key terms into the quick search textbox on the dashboard and clicking on the **magnifying glass** button:



- You can **browse** through the full suite of EQUELLA resources by Faculty/ Unit Code or Study Area:



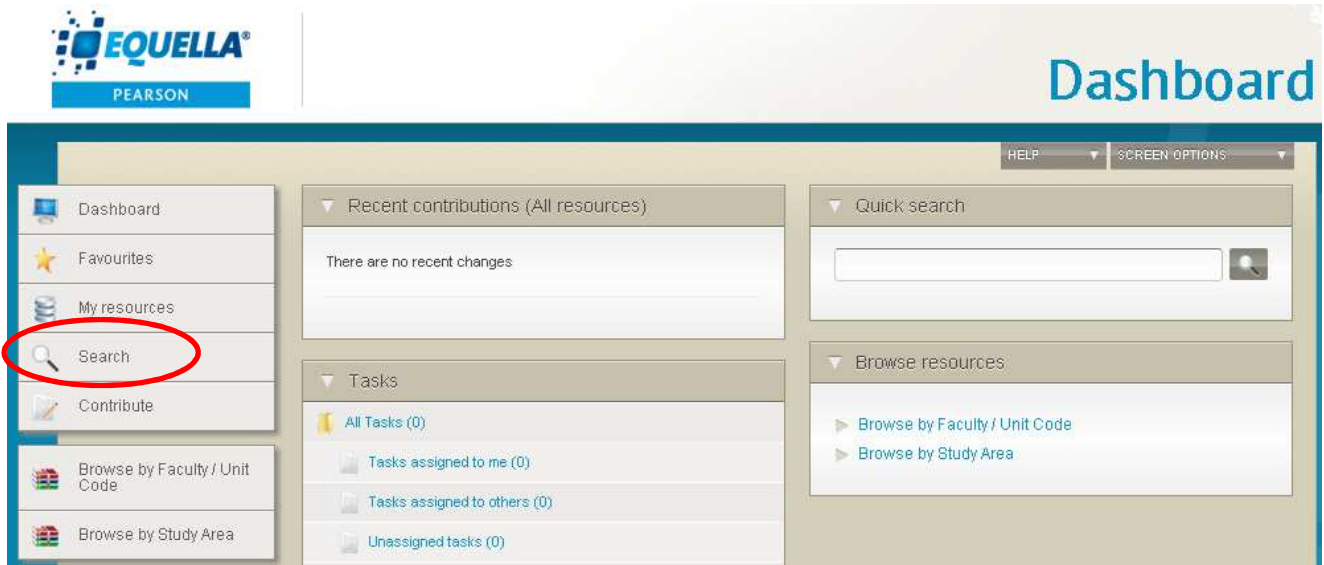
- You can use the **advanced search** function:



This user guide will describe searching using the **advanced search** function only.

Advanced search

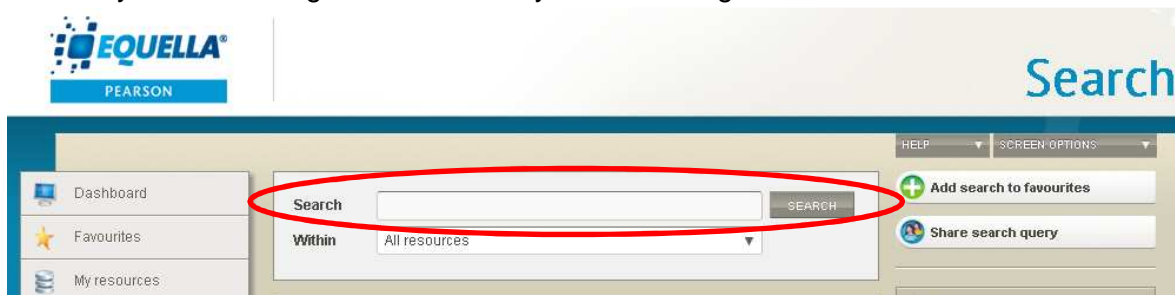
1. From the EQUELLA dashboard, click **Search**:



2. Remove any existing search filters (if necessary) by clicking **clear filters**:



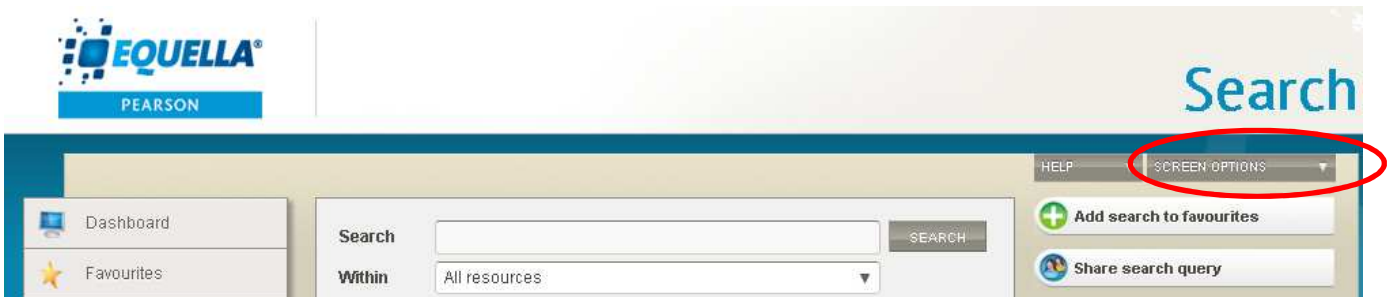
3. Enter key words relating to the resource you are looking for into the **Search** box:



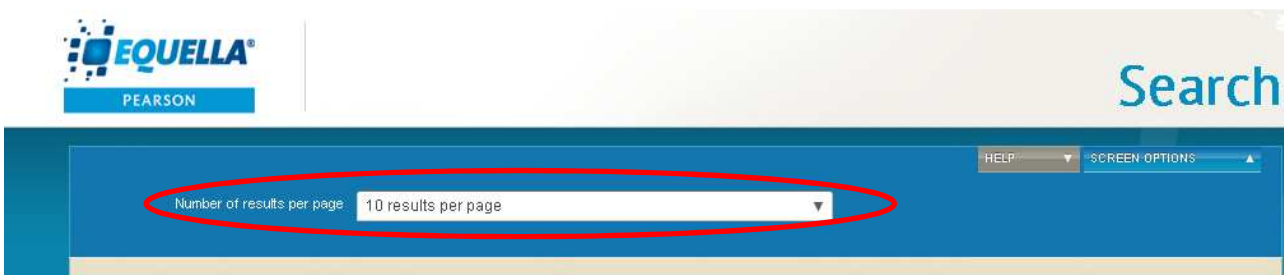
4. If desired, restrict your search to within a particular collection (ie. Faculty of Medicine, Nursing and Health Sciences) by clicking on the dropdown box next to **Within** and making your selection:



5. Click **Search**
6. A list of resources matching the search criteria are returned (sorted by relevance)
7. The default number of results per page is 10. If you would like to change this, click **Screen options** at the top right of your screen the expand the **screen options** section:



8. Click the dropdown box next to **Number of results per page** and make your selection:



9. Click **Screen options** at the top right of the page to collapse the **screen options** section

NB. If the results set returned is large, you may like to filter or sort it (see 'Managing search results' below)

Manage search results

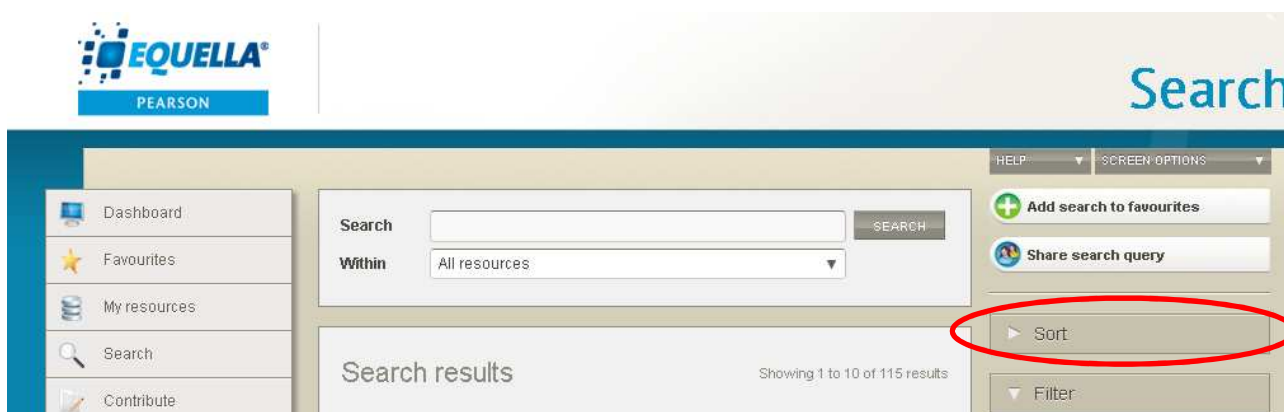
When you run a search in EQUELLA, the number of resources returned in the results set may be very large and overwhelming. In order to find the resource you are after quickly and easily, you may want to sort or filter the results. There are a number of ways in which you can do this – you can:

- Sort the returned resources by relevance, title, last modified date or user rating
- Restrict the results to resources owned (ie. developed or collaborated on) by a particular user
- Restrict the results by modification date
- Restrict results to resources of a particular type (eg. PDF document, video)

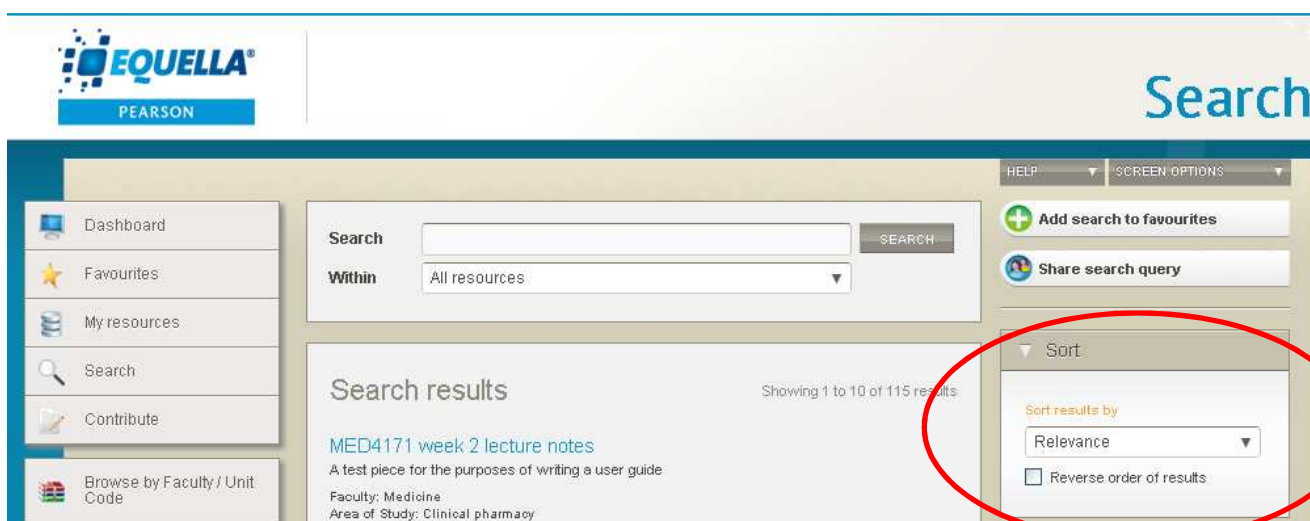
Each of these methods of managing your search results are described below:

Sort the returned resources by relevance, their title, last modified date or user rating

1. Once you have the results of a completed search on your screen, navigate to the **sort** section on the right side of your screen:



2. Expand the **sort** section by clicking on **sort**:



3. Click the dropdown box below **Sort results by** and make your selection (if you would like the results displayed in reverse order, check the box next to **Reverse order of results**)

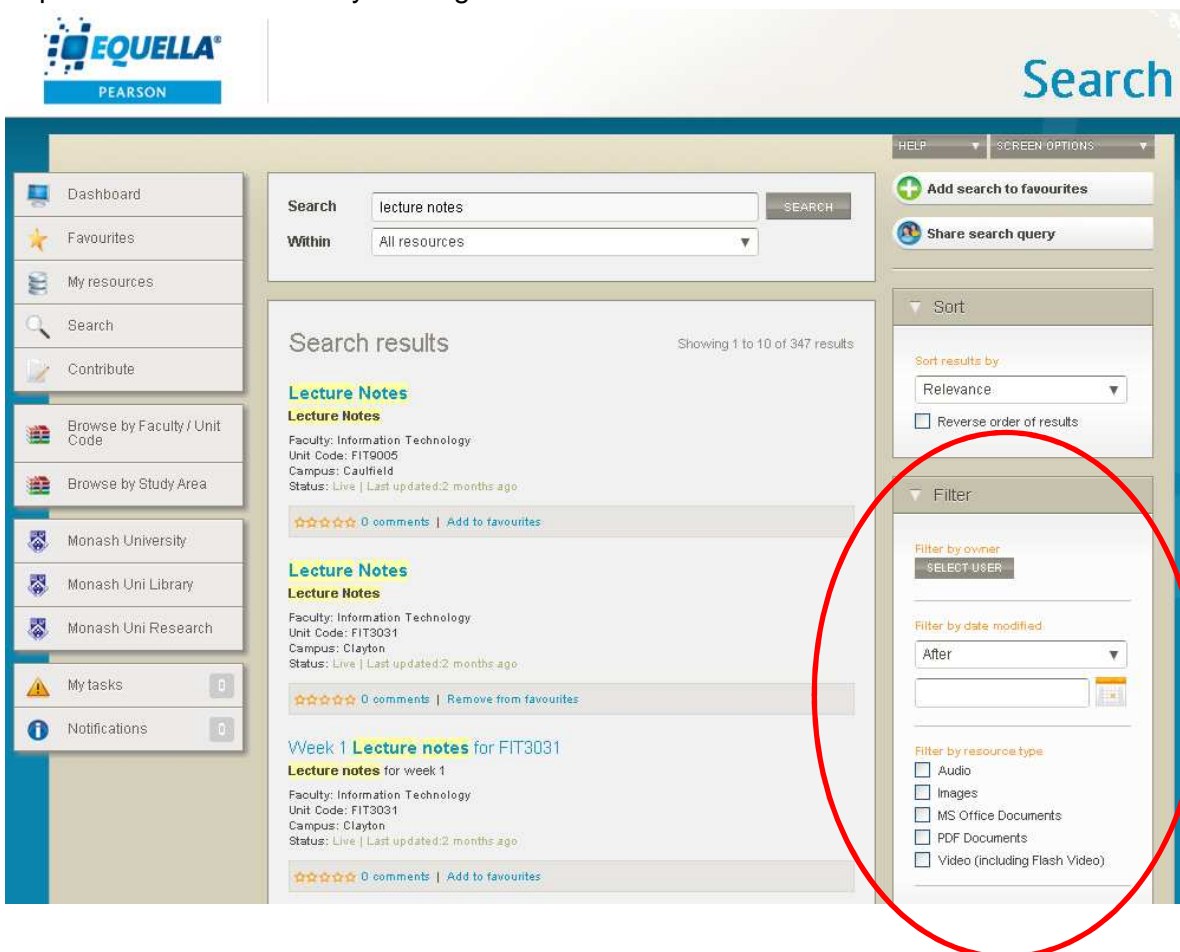
NB. To return to the original view of the results, select *Relevance* from the dropdown box below **Sort results by**

Restrict the results to resources owned (ie. developed or collaborated on) by particular resource author

1. Once you have the results of a completed search on your screen, navigate to the **filter** section on the right side of your screen:



2. Expand the **filter** section by clicking on **filter**:



3. Click the **Select User** button

4. Enter part of the name of the author/ collaborator you would like to restrict the results to and click **Search**
5. Select the name of the author/ collaborator from the list and click **Select this user**
6. Review the results
7. To *change* the author/ collaborator on which the results are filtered, click the **Change user** button; to *remove* the owner filter, click the **Clear** button:

The screenshot displays the EQUELLA search interface. At the top left is the EQUELLA PEARSON logo. The main search area shows a search box with 'lecture notes' and a 'SEARCH' button. Below the search box, it indicates '13 records have been filtered out - clear filters'. The search results section shows three results, each titled 'Lecture Notes' with details like Faculty, Unit Code, and Campus. On the right side, there are filter options: 'Sort results by' (set to Relevance), 'Filter by owner' (with 'CHANGE USER' and 'CLEAR' buttons circled in red), 'Filter by date modified' (set to After), and 'Filter by resource type' (with checkboxes for Audio, Images, MS Office Documents, PDF Documents, and Video).

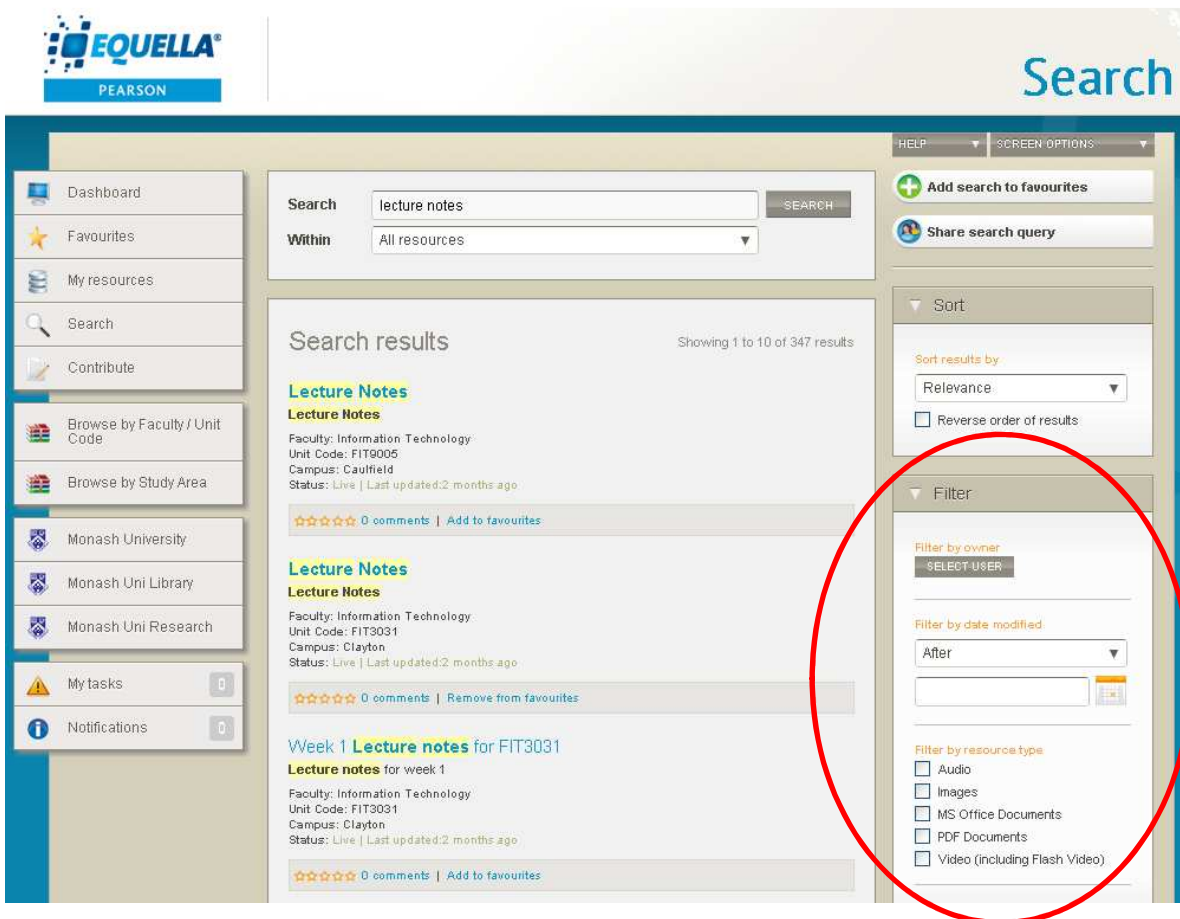
NB. To return to the original view of the results, click **Clear filters** at the top of the screen

Restrict the results by their last modified date

1. Once you have the results of a completed search on your screen, navigate to the **filter** section on the right side of your screen:



2. Expand the **filter** section by clicking on **filter**:



3. Click the dropdown box below **Filter by date modified** and make your selection
4. Complete the date field(s) as required
5. Review the results
6. To remove the date modified filter, click **Clear**:

The screenshot displays the EQUELLA search interface. On the left is a navigation sidebar with options like Dashboard, Favourites, My resources, Search, and Contribute. The main search area at the top shows a search box containing 'lecture notes' and a 'SEARCH' button. Below this, the search results are displayed, showing two 'Lecture Notes' entries. The first entry is for 'Lecture Notes' from Faculty: Information Technology, Unit Code: FIT9005, Campus: Caulfield, Status: Live, last updated 2 months ago. The second entry is for 'Lecture Notes' from Faculty: Information Technology, Unit Code: FIT3031, Campus: Clayton, Status: Live, last updated 2 months ago. On the right side, there are filters for sorting (Relevance) and filtering by owner, date modified (with a 'Clear' button circled in red), and resource type (Audio, Images, MS Office Documents, PDF Documents, Video).

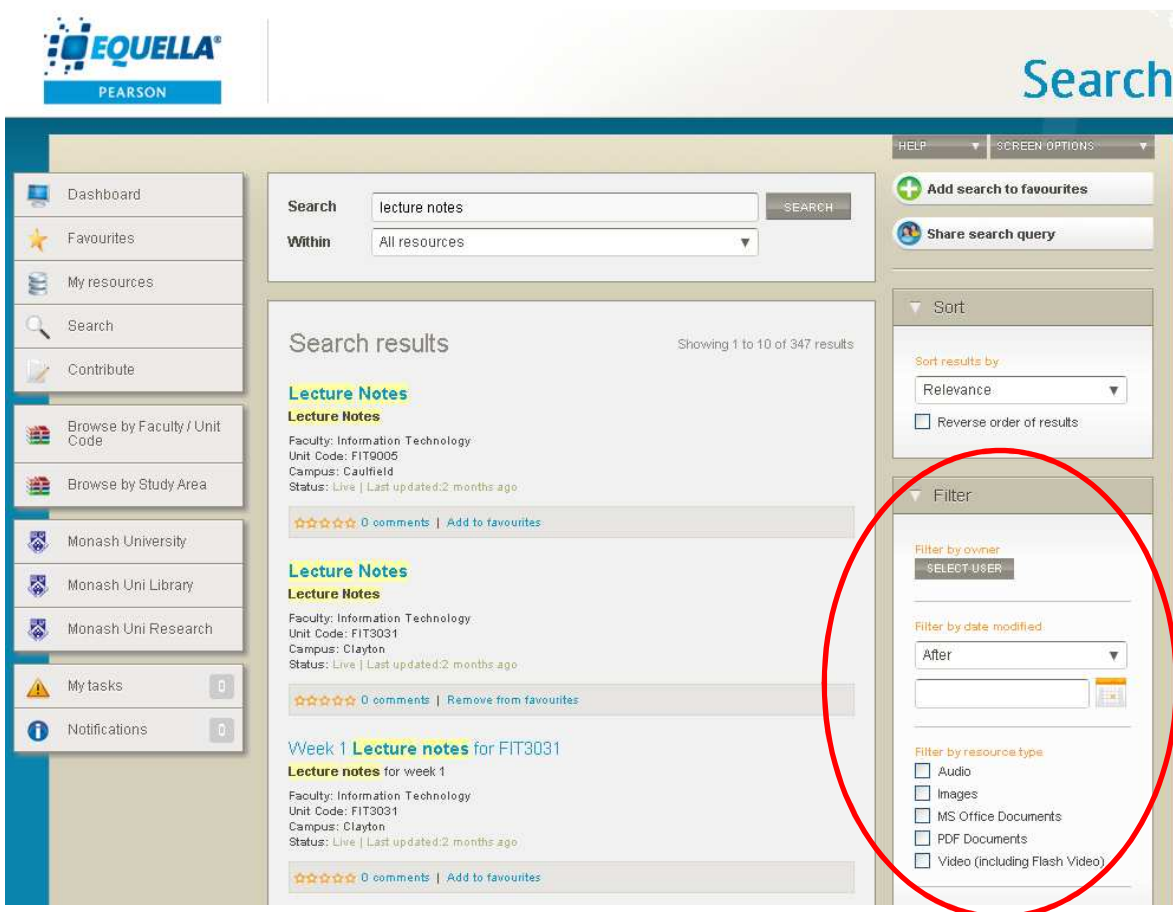
NB. To return to the original view of the results, click **Clear filters** at the top of the screen

Restrict results to resources of a particular type

1. Once you have the results of a completed search on your screen, navigate to the **filter** section on the right side of your screen:



2. Expand the **filter** section by clicking on **filter**:



3. Navigate to the **Filter by resource type** and make your selection(s)
4. Review the results

5. To *change* the resource type filter, check and uncheck the boxes in the **Filter by resource type** section as required; to *remove* the filter, uncheck all of the boxes in this section:

The screenshot displays the Equella search interface. At the top left is the Equella logo with 'PEARSON' underneath. At the top right is a 'Search' button. Below the logo is a navigation menu with items: Dashboard, Favourites, My resources, Search, Contribute, Browse by Faculty / Unit Code, Browse by Study Area, Monash University, Monash Uni Library, Monash Uni Research, My tasks (0), and Notifications (0).

The main search area shows a search box containing 'lecture notes' and a 'SEARCH' button. Below it, a dropdown menu is set to 'All resources'. A message states '80 records have been filtered out - [clear filters](#)'. The search results section is titled 'Search results' and shows 'Showing 1 to 10 of 267 results'. Three results are visible, each titled 'Lecture Notes - 04 - Computer Architecture' with a small thumbnail image. Each result includes details: Faculty: Information Technology, Unit Code: FIT9005, Campus: Caulfield, and Status: Live | Last updated: 2 months ago. Below each result are star ratings (0 comments) and an 'Add to favourites' link.

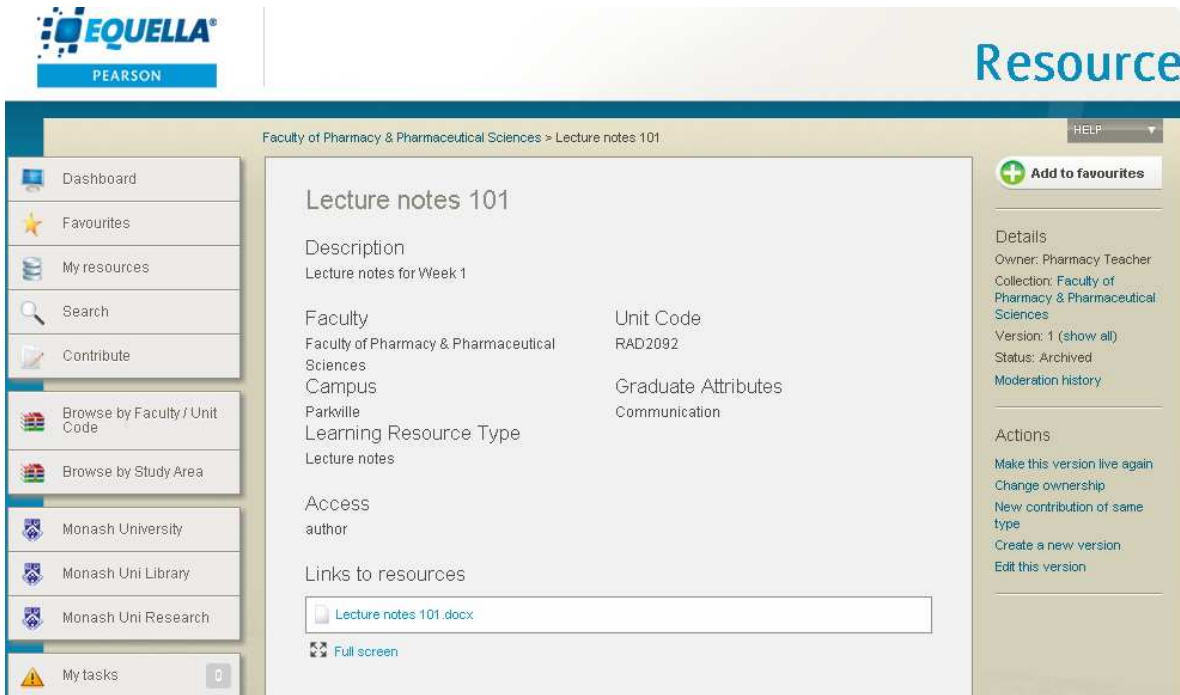
On the right side, there is a filter panel. It includes 'Add search to favourites' and 'Share search query' buttons. The 'Sort' section has a dropdown set to 'Relevance' and a checkbox for 'Reverse order of results'. The 'Filter' section has three sub-sections: 'Filter by owner' with a 'SELECT USER' button, 'Filter by date modified' with a dropdown set to 'After' and a date input field, and 'Filter by resource type' which is circled in red. The 'Filter by resource type' section contains the following options:

- Audio
- Images
- MS Office Documents
- PDF Documents
- Video (including Flash Video)

Bookmark/ Save an EQUELLA resource

You may have a resource that you anticipate using multiple times – one that you would like to bookmark or save for future use. To save a resource to your favourites:

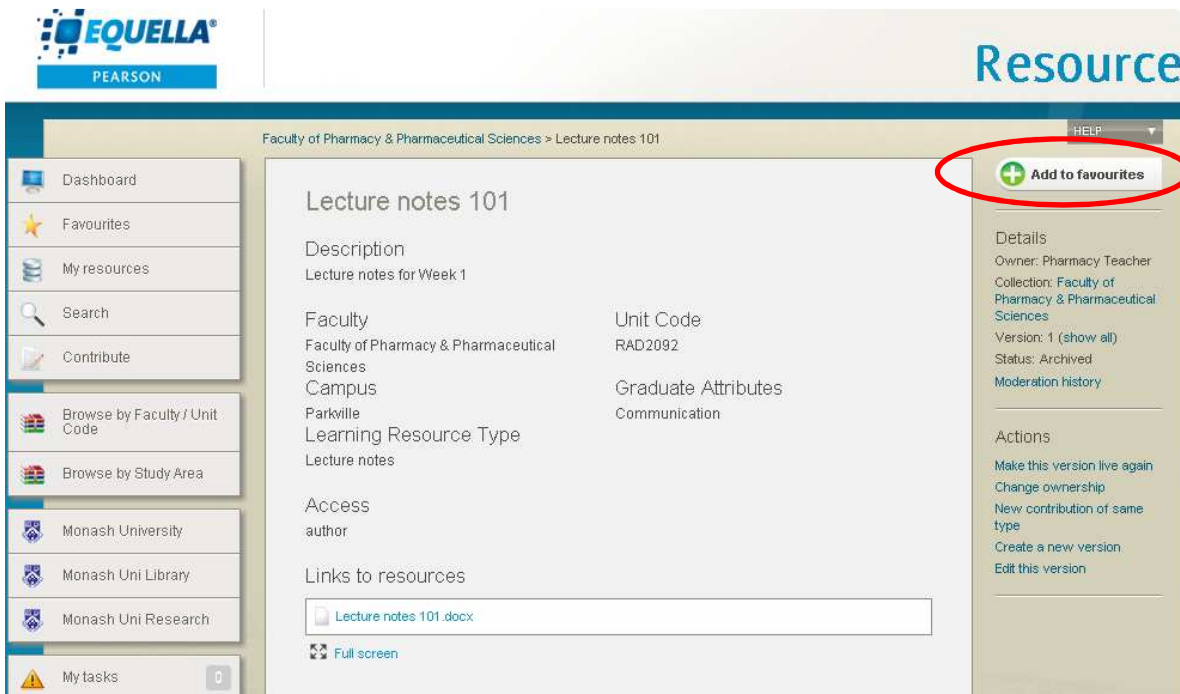
1. Locate the resource you would like to bookmark/ save and open it into the individual Resource screen:



The screenshot shows the EQUELLA interface for a resource titled 'Lecture notes 101'. The page is divided into several sections:

- Left Sidebar:** Contains navigation options such as Dashboard, Favourites, My resources, Search, Contribute, Browse by Faculty / Unit Code, Browse by Study Area, Monash University, Monash Uni Library, Monash Uni Research, and My tasks.
- Header:** Displays the EQUELLA logo and the word 'Resource'.
- Main Content Area:** Shows the resource title 'Lecture notes 101' and its description 'Lecture notes for Week 1'. It lists details such as Faculty (Faculty of Pharmacy & Pharmaceutical Sciences), Unit Code (RAD2092), Campus (Parkville), and Learning Resource Type (Lecture notes). It also includes an 'Access' section with 'author' and a 'Links to resources' section with a link to 'Lecture notes 101.docx' and a 'Full screen' button.
- Right Sidebar:** Features an 'Add to favourites' button (highlighted with a green plus icon), a 'Details' section with information like Owner (Pharmacy Teacher), Collection (Faculty of Pharmacy & Pharmaceutical Sciences), Version (1), and Status (Archived), and an 'Actions' section with options like 'Make this version live again', 'Change ownership', 'New contribution of same type', 'Create a new version', and 'Edit this version'.

2. Navigate to the **Add to favourites** button on the right side of your screen:

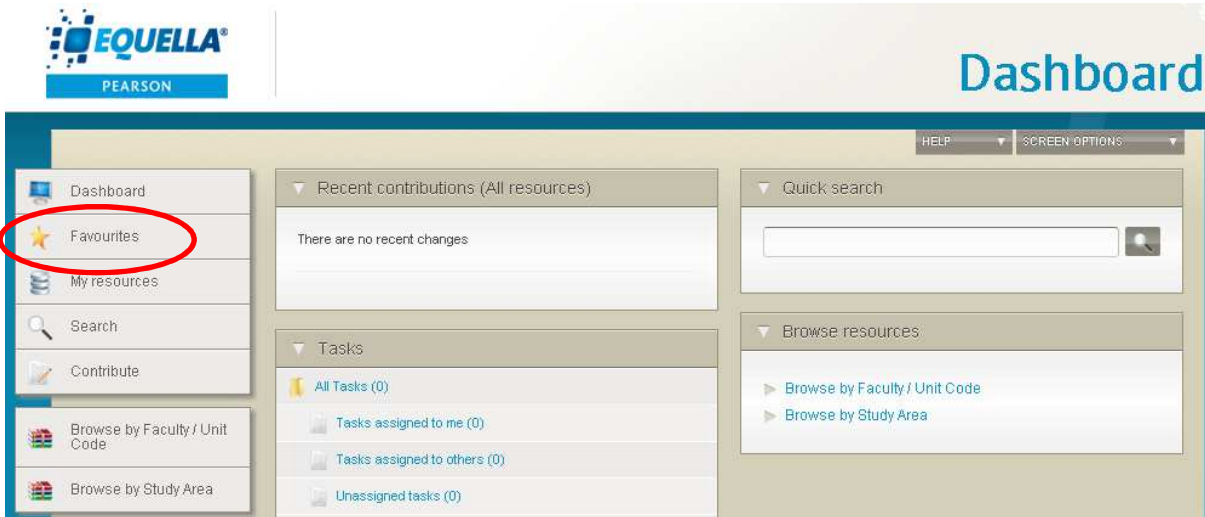


This screenshot is identical to the one above, but the 'Add to favourites' button in the right sidebar is circled in red to indicate the next step in the process.

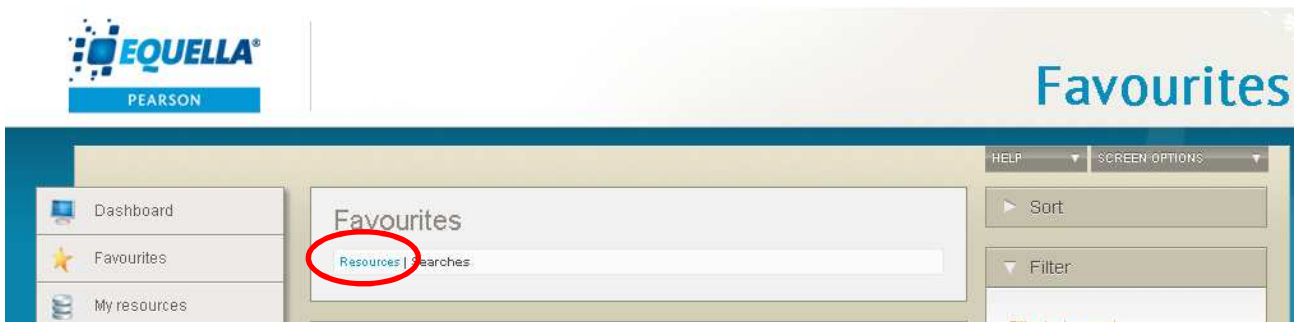
3. Click the **Add to favourites** button and add any tags that would help you search for the resource at a later date under the 'Provide tags to help when searching (optional)' heading
4. Update the 'Select version to add' section as necessary and click **Add**
5. You should see a 'Successfully added to favourites' message at the top of your screen

Reuse a favourite/ bookmarked resource

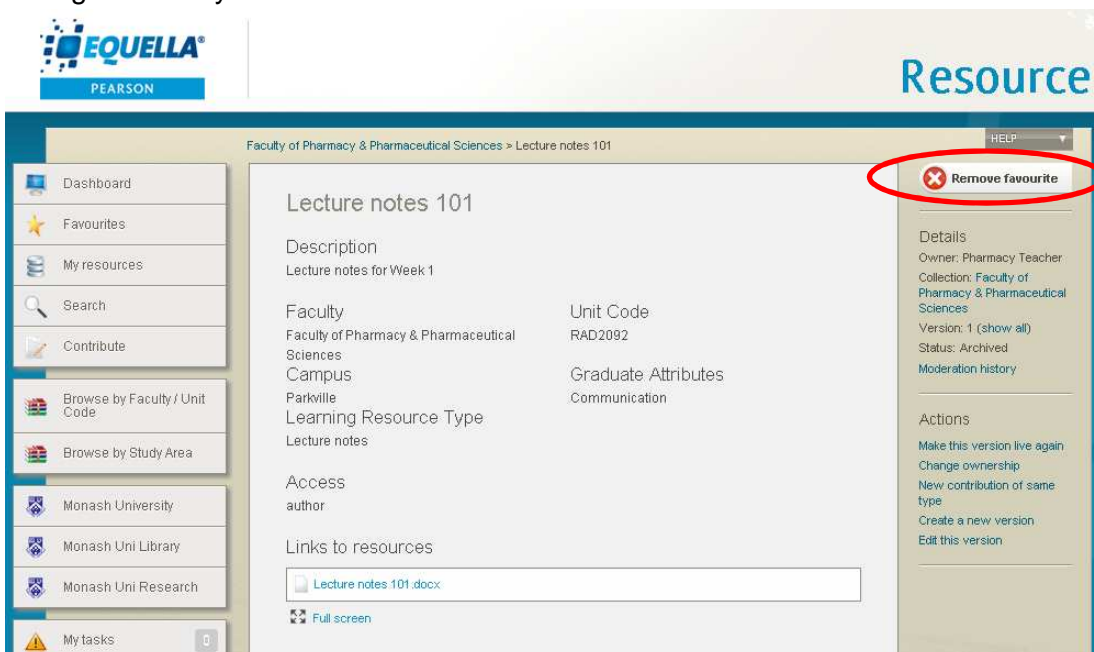
1. From the EQUELLA dashboard, click **Favourites**:



2. Under the **Favourites** title, select **Resources**:



3. Browse the list of saved resources and select the one you are after
4. You will be taken to the individual Resource screen where you can view the resource
5. If you wish to delete the resource from your favourites at this point, click the **Remove favourite** button on the right side of your screen:

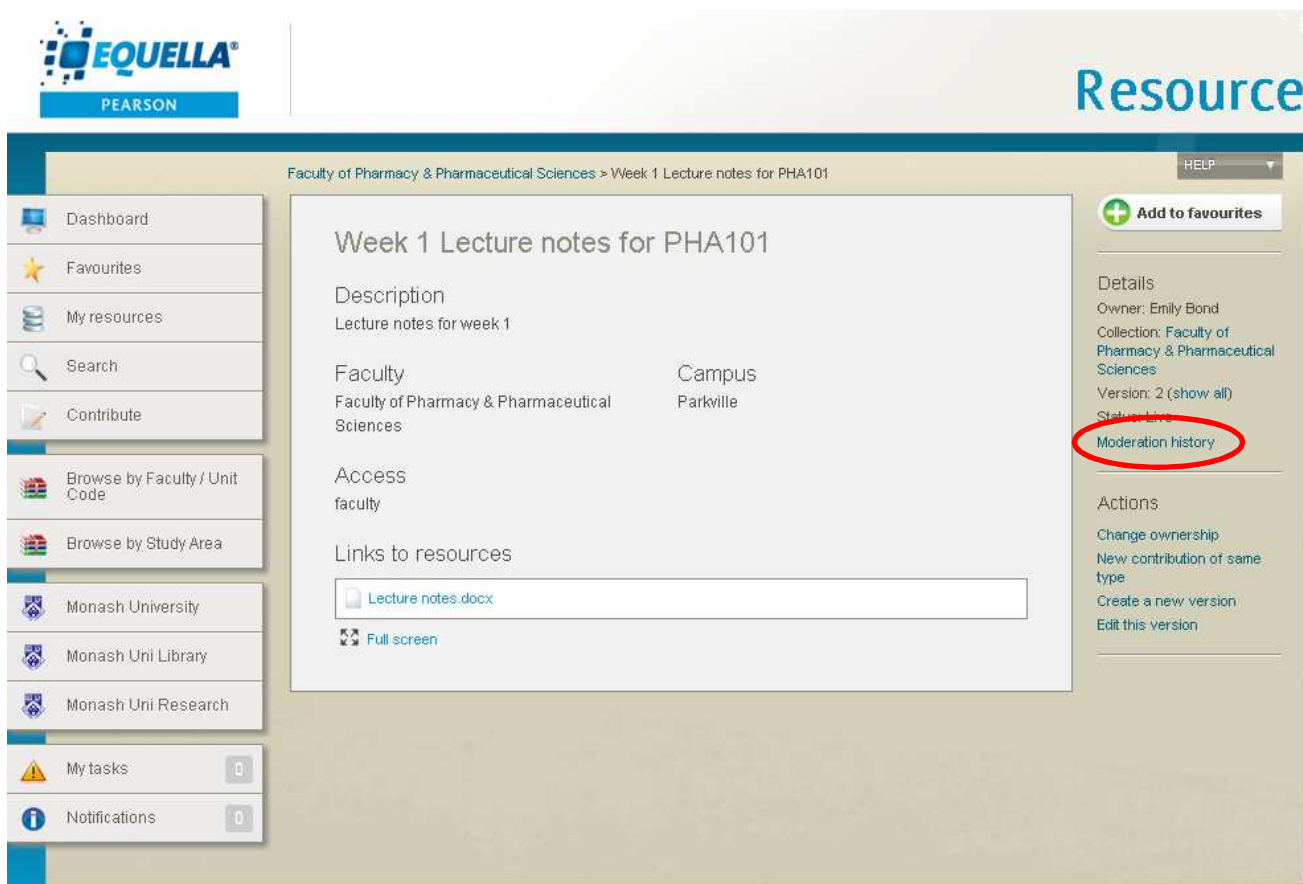


View resource moderation information

There may be times when you need to look back at an EQUELLA resource's history – to see when it was contributed/ added to EQUELLA, when a new version of the resource was created, or when a new version went live.

To access a resource's moderation information:

1. Search for the EQUELLA resource for which you would like to view a history
2. Click the **Moderation history** link:



The screenshot shows the EQUELLA interface for a resource titled "Week 1 Lecture notes for PHA101". The page is divided into several sections:

- Header:** EQUELLA PEARSON logo on the left, "Resource" title on the right.
- Navigation:** A sidebar on the left with links: Dashboard, Favourites, My resources, Search, Contribute, Browse by Faculty / Unit Code, Browse by Study Area, Monash University, Monash Uni Library, Monash Uni Research, My tasks, and Notifications.
- Main Content:**
 - Description:** "Lecture notes for week 1"
 - Faculty:** Faculty of Pharmacy & Pharmaceutical Sciences
 - Campus:** Parkville
 - Access:** faculty
 - Links to resources:** A box containing a link to "Lecture notes.docx" and a "Full screen" button.
- Right Sidebar:**
 - Add to favourites:** A green button with a plus icon.
 - Details:** Owner: Emily Bond, Collection: Faculty of Pharmacy & Pharmaceutical Sciences, Version: 2 (show all), Status: Live.
 - Moderation history:** A link circled in red.
 - Actions:** Change ownership, New contribution of same type, Create a new version, Edit this version.

3. Adjust the level of detail given in the moderation history by selecting (and deselecting) the options below the Moderation history table:

Faculty of Pharmacy & Pharmaceutical Sciences > Week 1 Lecture notes for PHA101 > Moderation history

- Dashboard
- Favourites
- My resources
- Search
- Contribute
- Browse by Faculty / Unit Code

Moderation history

Event	User	Date
Went live	Emily Bond	13 days ago
Contributed	Emily Bond	13 days ago
New versioned	Emily Bond	13 days ago

This item is due for review in 12 months

Basic details
 Include edits
 Include all moderation details

[Add to favourites](#)

Details

Owner: Emily Bond
 Collection: Faculty of Pharmacy & Pharmaceutical Sciences
 Version: 2 (show all)
 Status: Live
[Moderation history](#)

Actions

[Change ownership](#)

NB. Because the date section in the Moderation history table is not specific (ie. 13 days ago, 2 months ago, etc.), you may like to add a date into the title of each version of your resource so that you can quickly and easily determine when that version was used/ valid.

Add an EQUELLA resource in Moodle

Prior to the start of each semester, teaching staff are given the opportunity to update their Moodle units with content relevant for the upcoming teaching period. With the introduction of EQUELLA, rather than uploading resources (eg. lecture notes, unit guides, etc.) **directly** into Moodle, teaching staff can add **links** to resources stored in EQUELLA.

When adding a link to an EQUELLA resource, teaching staff can do one of the following:

1. Link to the entire EQUELLA resource (ie. the metadata entered about the resource plus any files/ attachments)
2. Link directly to a file/ attachment **within** an EQUELLA resource

There are advantages and disadvantages of both – Appendix B explains the difference between linking to an EQUELLA resource and a file/ attachment **within** an EQUELLA resource, and when it may be appropriate to opt for one over the other. It is recommended that you take the time to understand the differences between and implications for each option before making a decision. As a general rule, it is recommended that you link directly to a file/ attachment.

The following section will explain both the process for adding a link to an EQUELLA resource and a file/ attachment from within an EQUELLA resource:

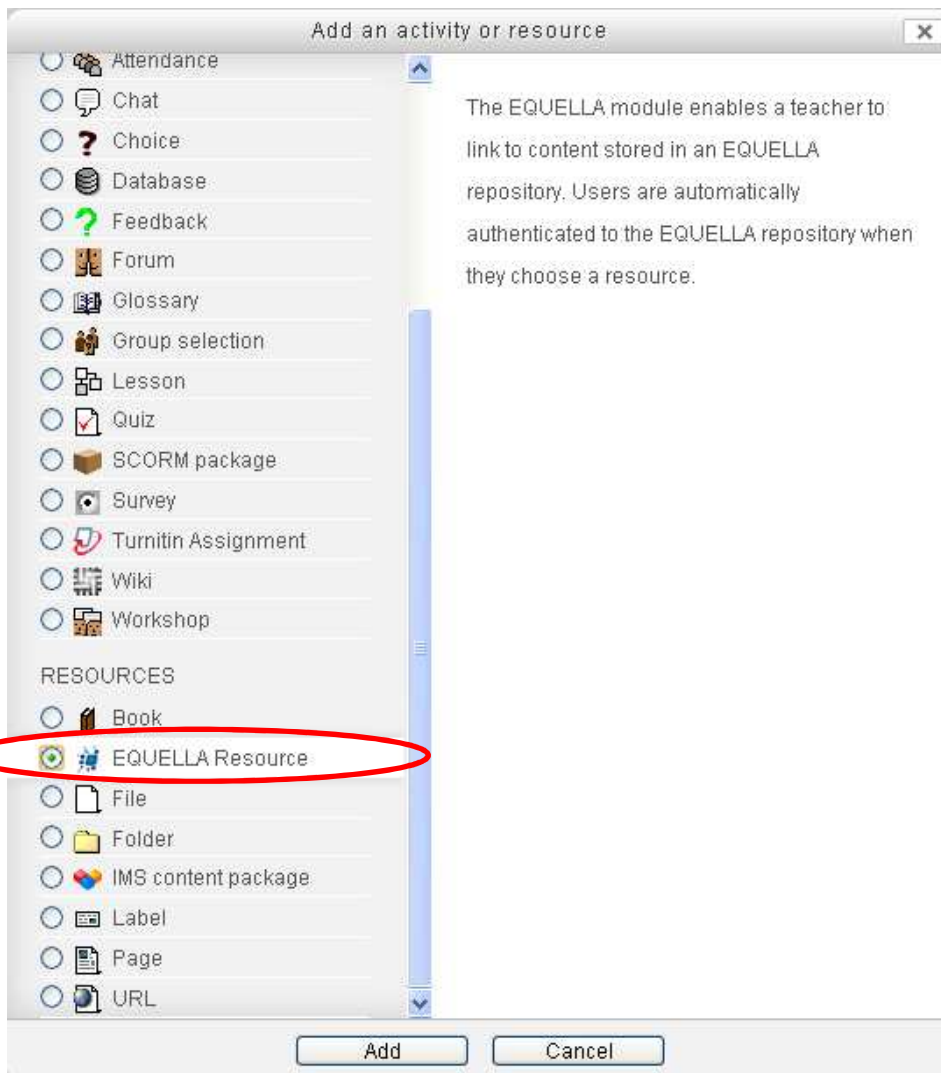
The rules around linking to an EQUELLA resource vs. a file/ attachment in Appendix B are generic. Please see your Faculty Administrator about when each is appropriate for your faculty.

Add a link to an entire EQUELLA resource in Moodle

1. Navigate to your Moodle unit page and ensure [editing is on](#).
2. Locate the section where you want to add the resource and click **Add an activity or resource**:



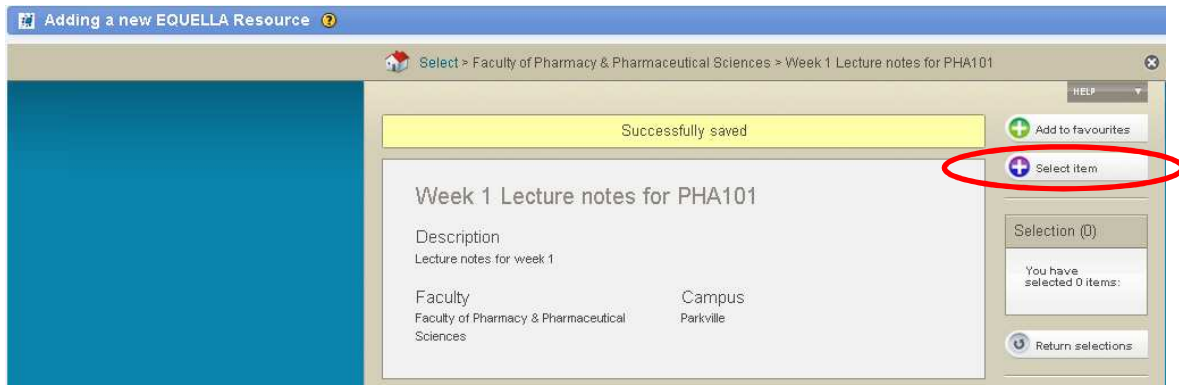
3. Select **EQUELLA Resource** from the Resources list and click **Add**:



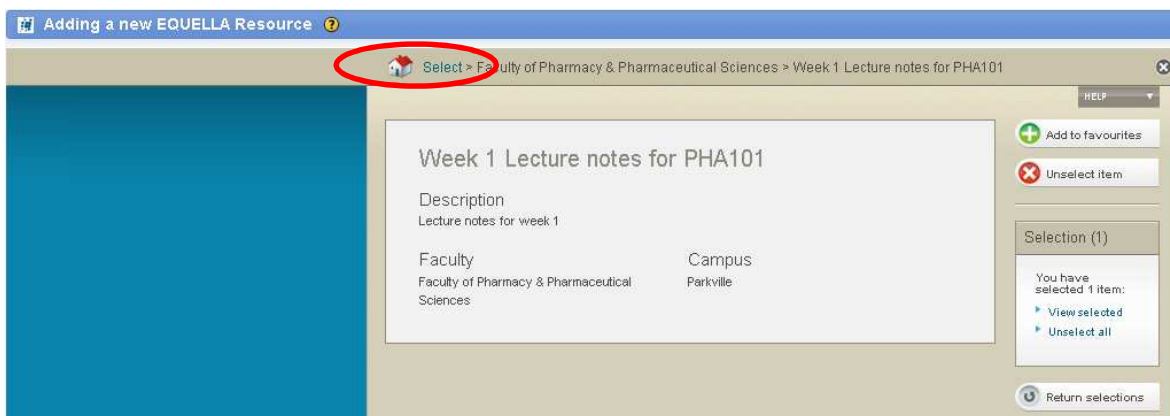
NB. If you see *two* EQUELLA Resource items in your Resources list, make sure you select **EQUELLA Resource** and not **EQUELLA Resource - Medicine**

4. To create a new resource from scratch:

- a) Click the **Contribute** button and follow the instructions in the [Add a resource to EQUELLA](#) section of this document
- b) Once you have added the resource, you should see a 'Successfully saved' message at the top of your screen
- c) Click the **Select item** button on the right side of your screen:

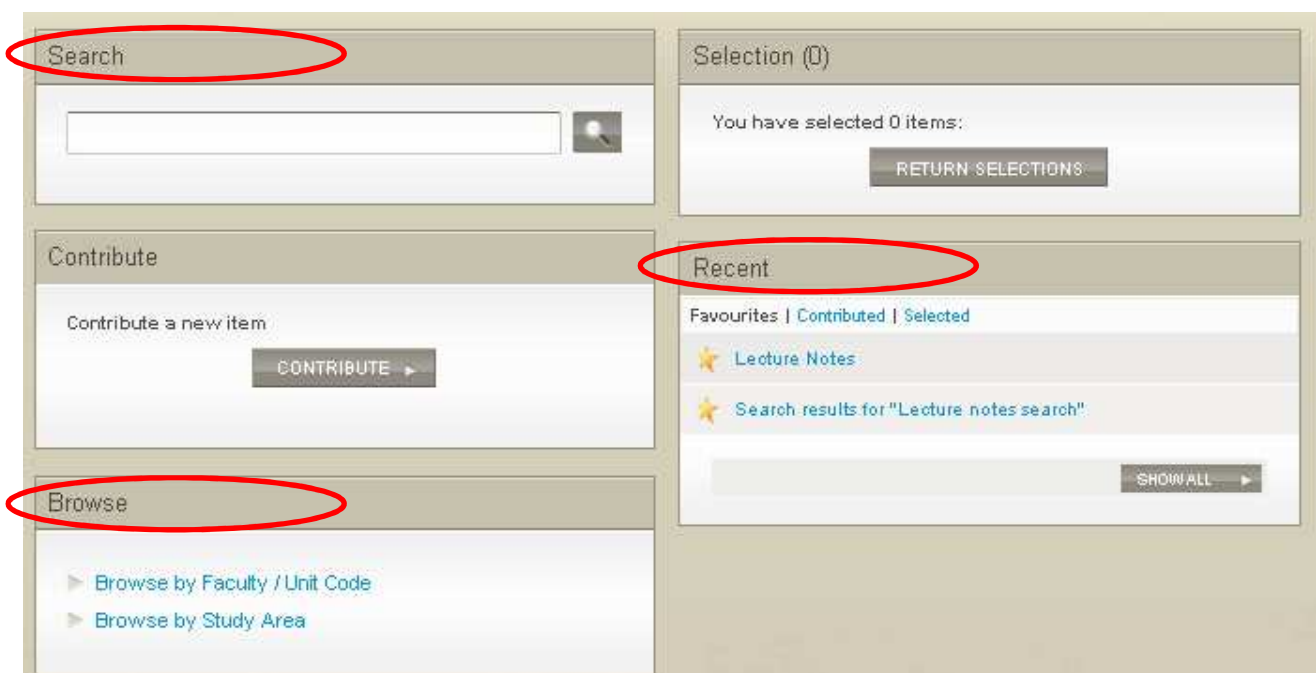


d) Click **Select** in the breadcrumbs at the top of the screen:

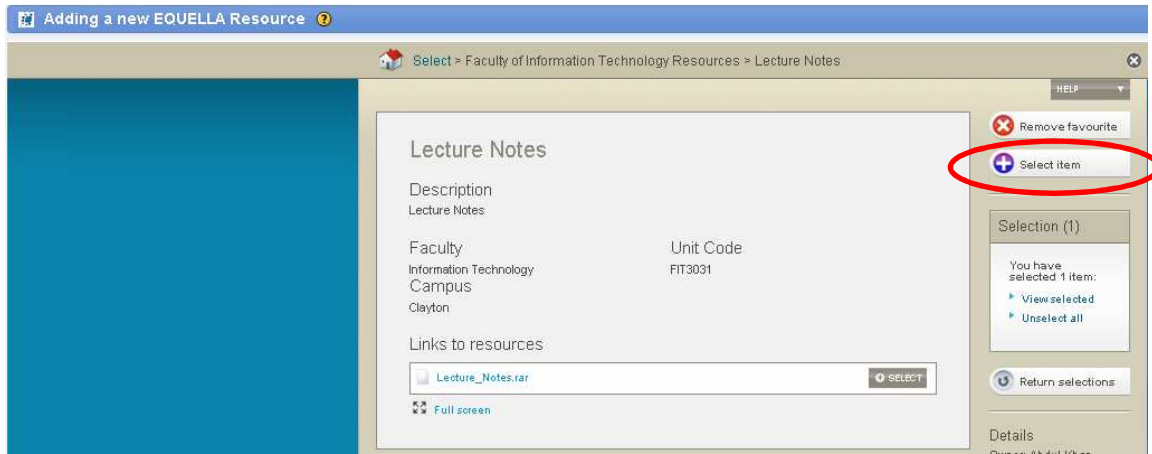


5. To add an existing EQUELLA resource:

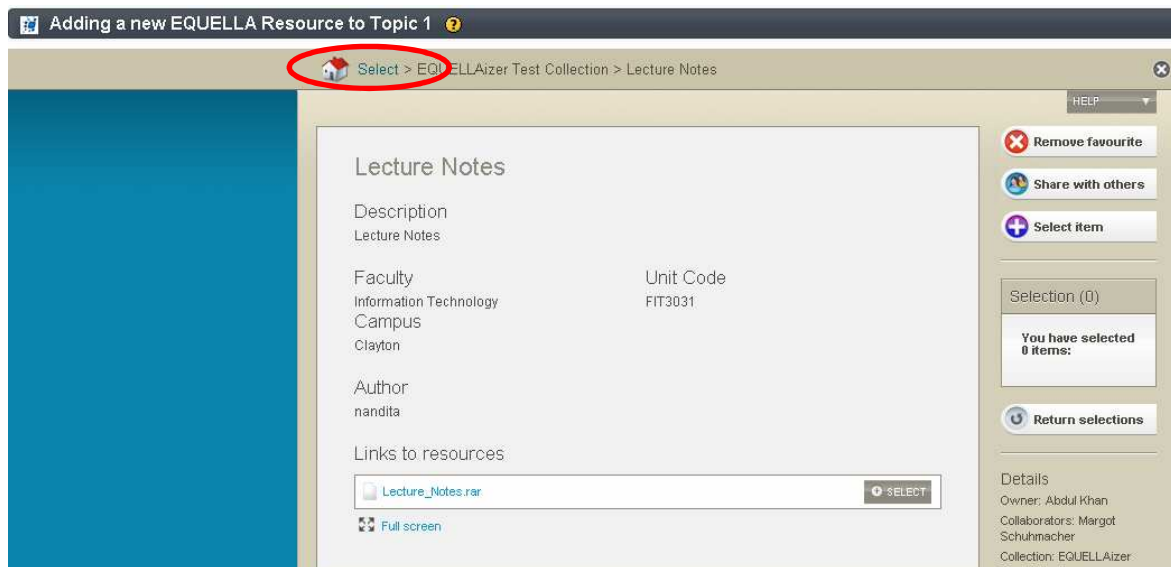
a) Locate the resource you wish to add using either the Search, Browse or Recent functions (see [Search for a resource in EQUELLA](#) section for further information on how to use these functions):



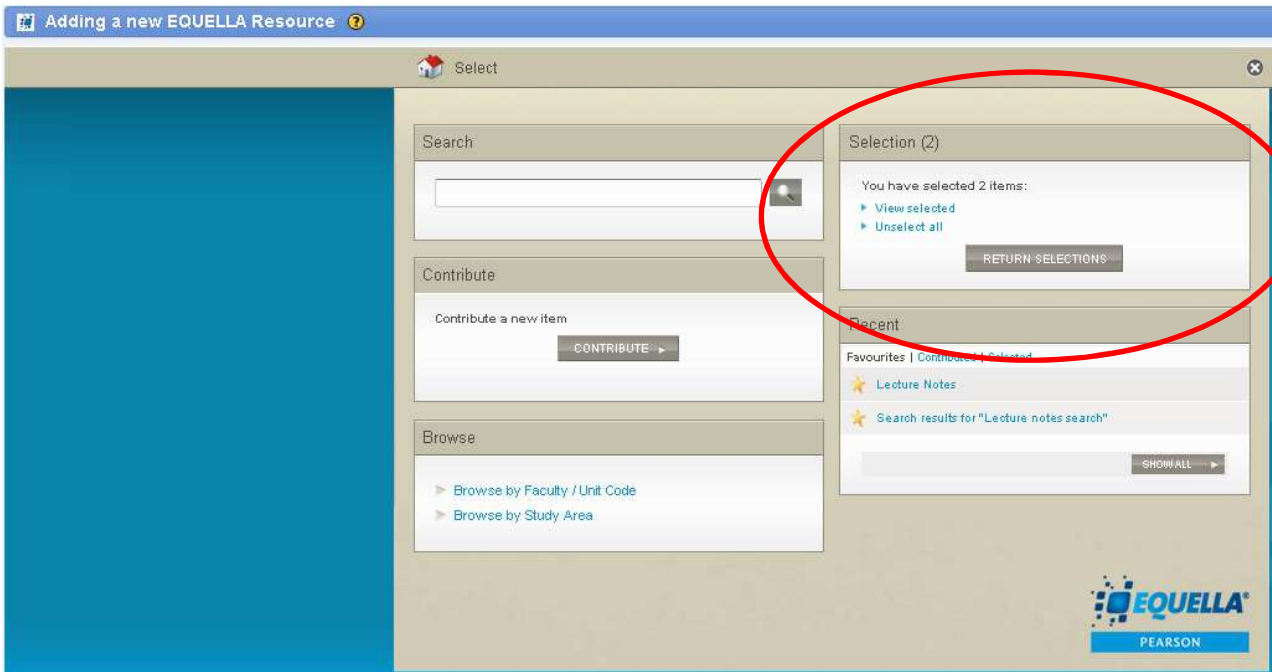
b) Click the **Select item** button on the right side of your screen:



c) Click **Select** in the breadcrumbs at the top of the screen:



6. Repeat step 4 and/ or 5 above until you have selected all of the EQUELLA resources you wish to add to Moodle at this time
7. Navigate to the Selection section and review the full suite of EQUELLA resources selected:



8. Once satisfied with your selections, click the **Return selections** button, followed by a second **Return selections** button, to return to your Moodle unit
9. Note that the EQUELLA resource(s) you selected now appear in your Moodle unit:

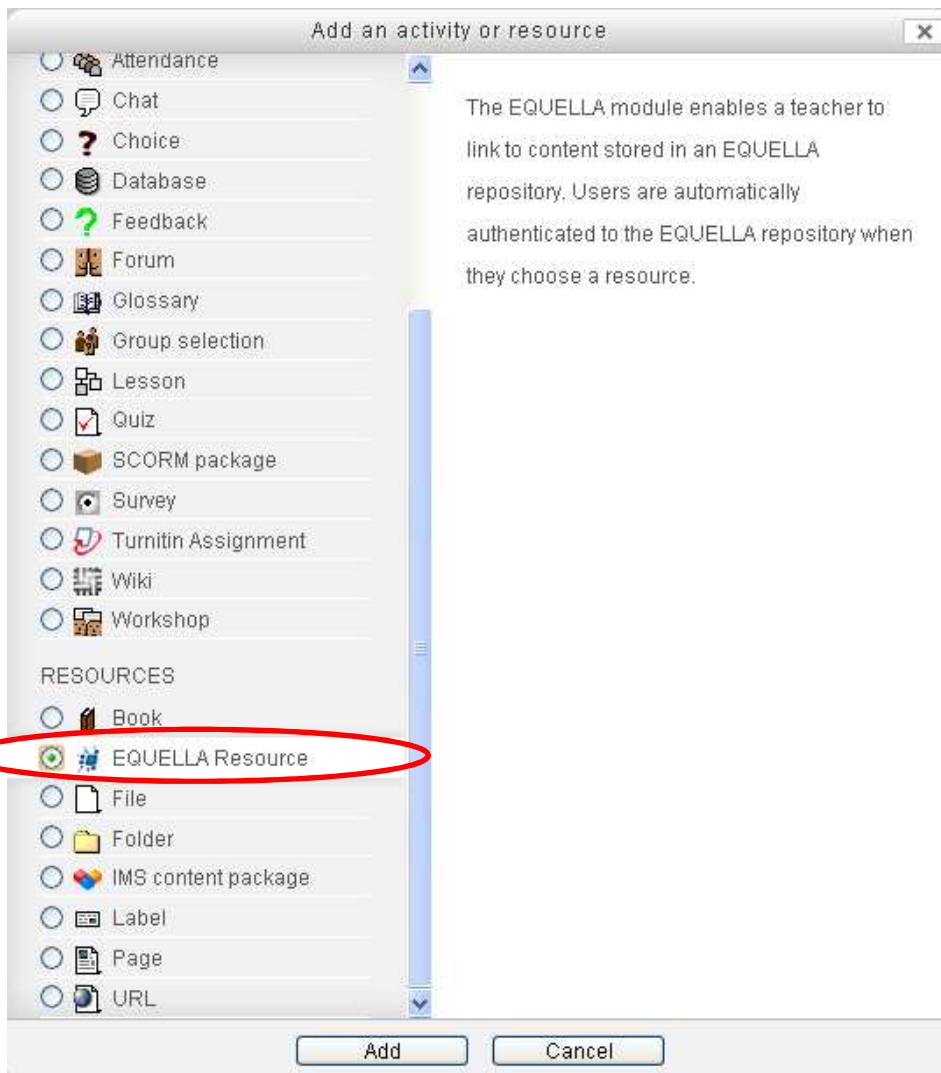


Add a link to a file/ attachment *within* an EQUELLA resource

1. Navigate to your Moodle unit page and ensure [editing is on](#).
2. Locate the section where you want to add the resource and click **Add an activity or resource**:

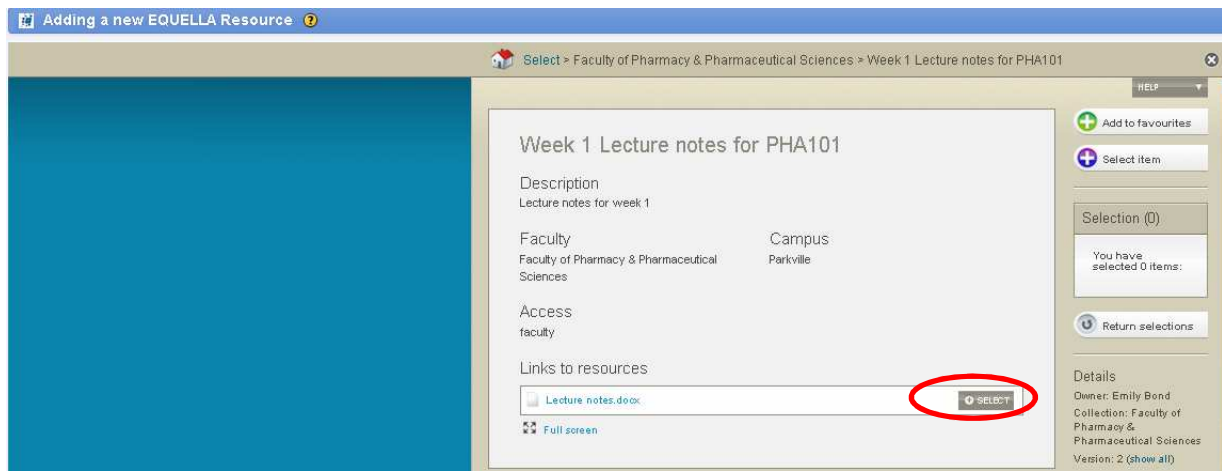


3. Select **EQUELLA Resource** from the Resources list and click **Add**:

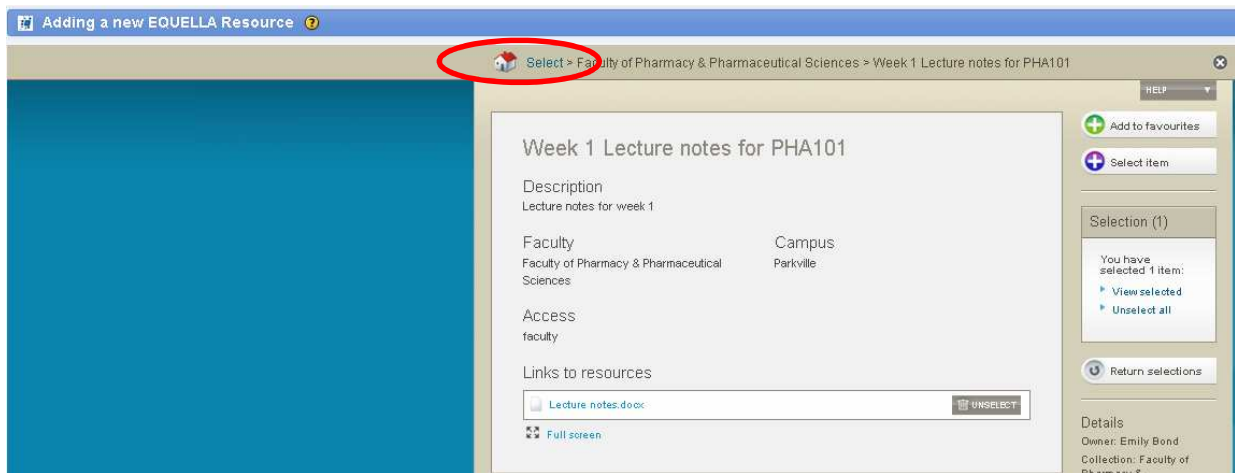


NB. If you see *two* EQUELLA Resource items in your Resources list, make sure you select **EQUELLA Resource** and not **EQUELLA Resource - Medicine**

4. To create a new resource (with file(s)/ attachment(s)) from scratch:
 - a) Click the **Contribute** button and follow the instructions in the [Add a resource to EQUELLA](#) section of this document
 - b) Once you have added the resource, you should see a 'Successfully saved' message at the top of your screen
 - c) Determine which file/ attachment you would like to link to in your Moodle unit and click the **Select** button to the immediate right of the file/ attachment:

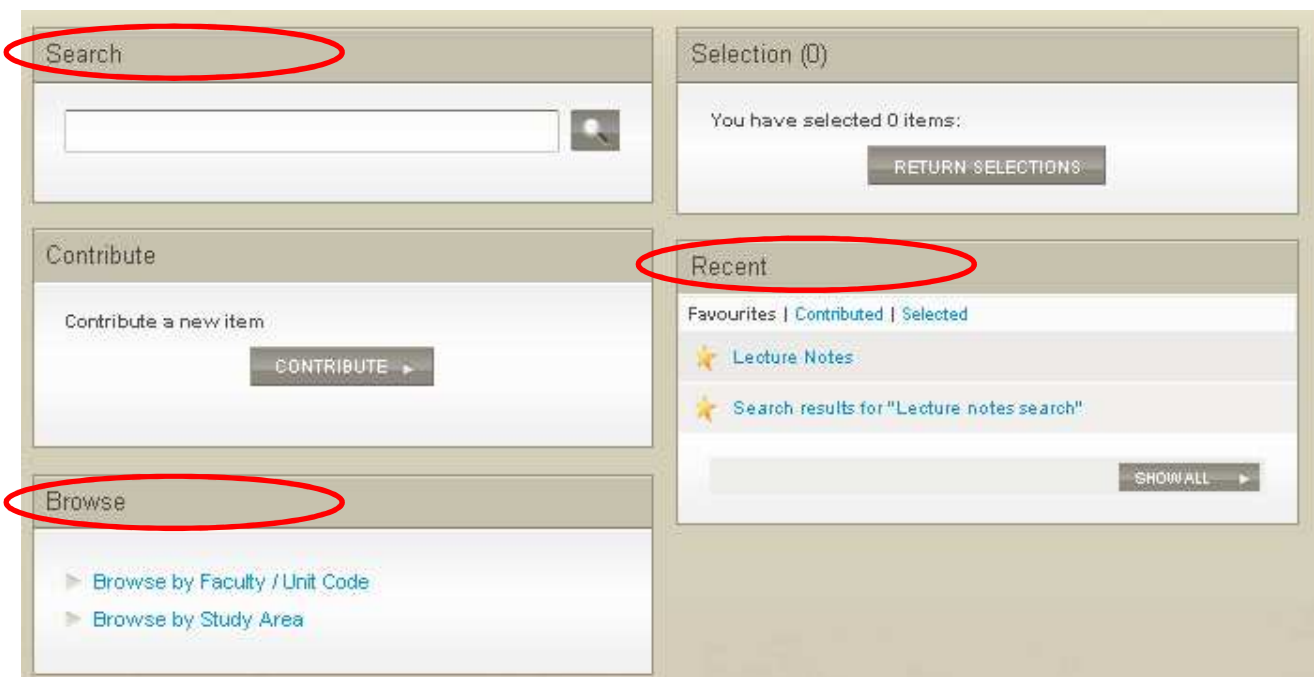


d) Click **Select** in the breadcrumbs at the top of the screen:

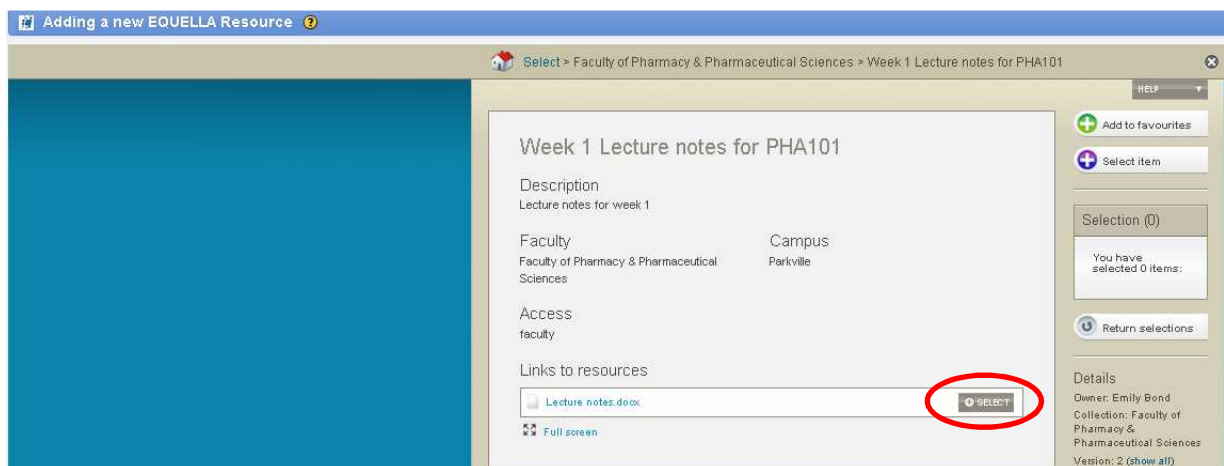


5. To add a file/ attachment from within an existing EQUELLA resource:

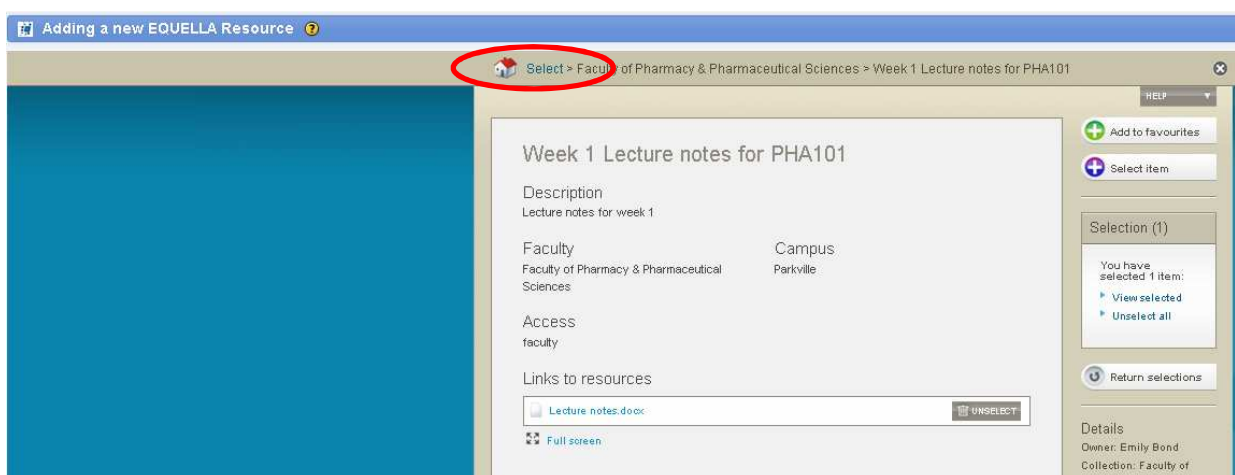
- a) Locate the resource you wish to add using either the Search, Browse or Recent functions (see [Search for a resource in EQUELLA](#) section for further information on how to use these functions):



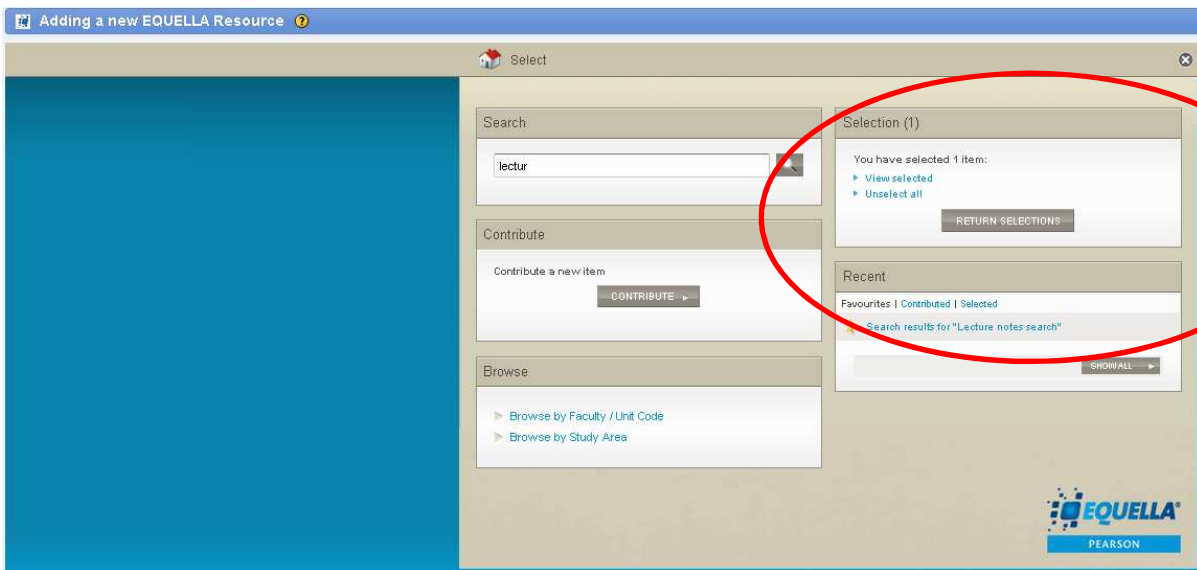
b) Determine which file/ attachment you would like to link to in your Moodle unit and click the **Select** button to the immediate right of the file/ attachment:



c) Click **Select** in the breadcrumbs at the top of the screen:



- Repeat step 4 and/ or 5 above until you have selected all of the EQUELLA files/ attachments you wish to add to Moodle at this time
- Navigate to the Selection section and review the full suite of EQUELLA files/ attachments selected:



- Once satisfied with your selections, click the **Return selections** button, followed by a second **Return selections** button, to return to your Moodle unit
- Note that the file(s)/ attachment(s) you selected now appear in your Moodle unit:



Update an EQUELLA resource

Once you have saved a resource into EQUELLA, you can go back and edit it at any time **or** create a new version of the resource. The situations in which you opt for editing a resource vs. creating a new version vary – Appendix A explains the difference between editing a resource and creating a new version, and when it is appropriate to opt for one over the other. The following section will explain the process for updating an EQUELLA resource using both methods:

The rules for editing versus creating a new version explained in Appendix A are generic. Please see your Faculty Administrator about when each is appropriate for your faculty.

Edit a resource in EQUELLA

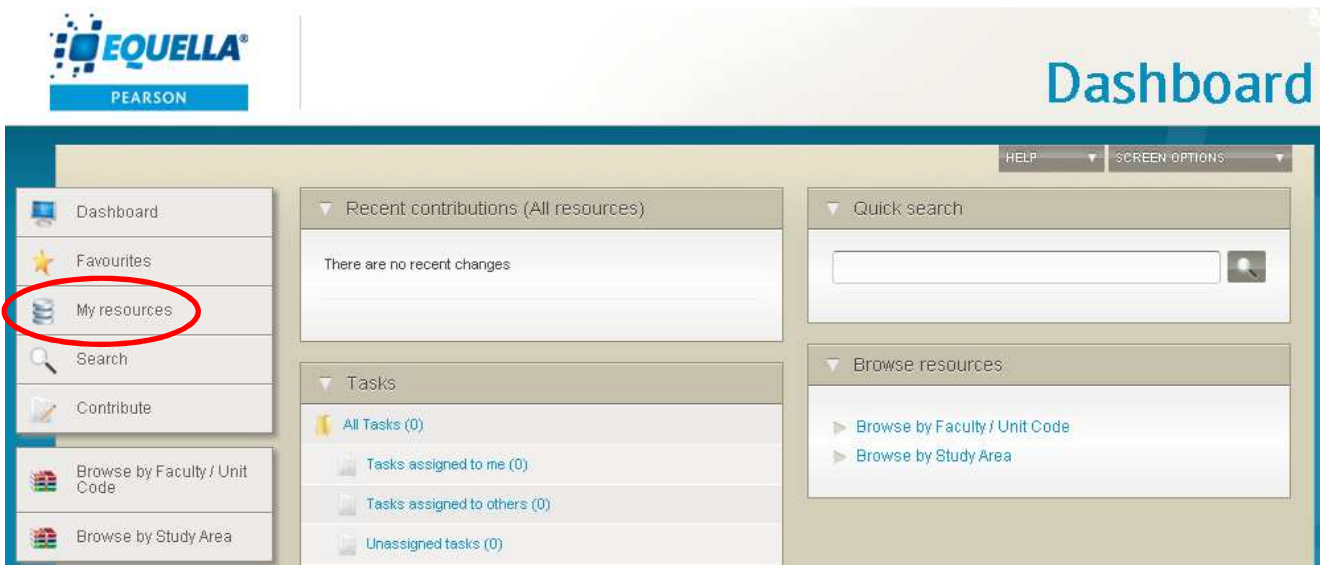
An EQUELLA resource contains two key elements:

- I. Metadata (ie. information about the resource such as title, description, units to which the resource is relevant, etc.)
- II. Files/ attachments

The steps required to edit each are detailed below:

I. Edit a resource's metadata

1. From the EQUELLA dashboard, click **My resources**:



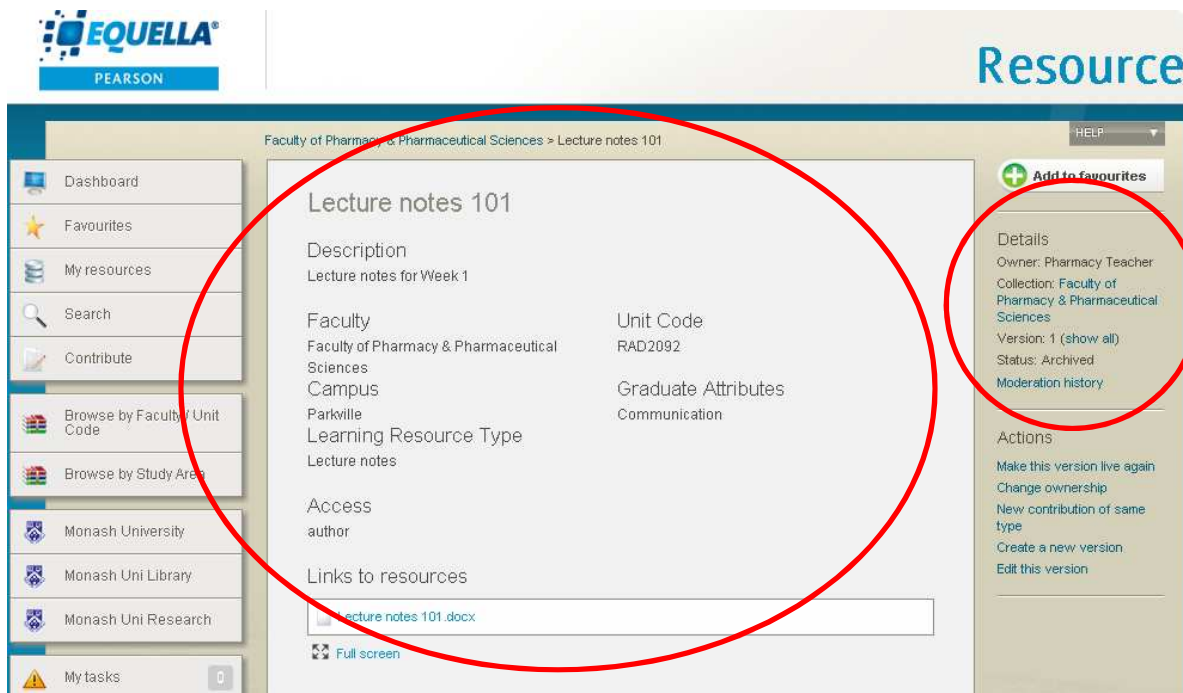
2. At the top of your screen, you will see a **My resources** heading with a series of subheadings below:



3. Click each of the subheadings to scroll through the full suite of resources *owned by you*
4. Locate the resource you want to edit under the **Results** heading in the centre of your screen

NB. If the resource you want to edit is not visible on the page, use the **sort** or **filter** function on the right of your screen to assist

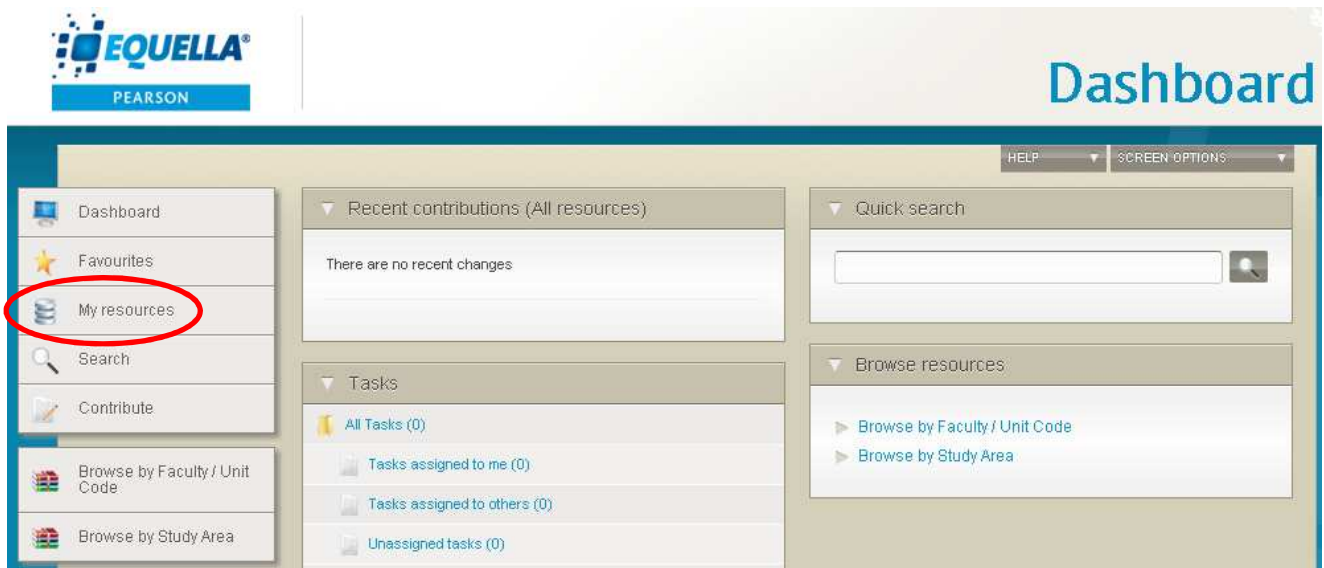
5. Click the title of the resource you want to edit and review the information recorded about it:



6. Locate the **Actions** list at the bottom right of your screen and click **Edit this version**
7. Update the metadata pertaining to the resource as necessary and click **Save**
8. Once you have been returned to the Resource screen, you should see a 'Successfully saved' message at the top of your screen

II. Edit a resource's files/ attachments

1. From the EQUELLA dashboard, click **My resources**:



2. At the top of your screen, you will see a **My resources** heading with a series of subheadings below:

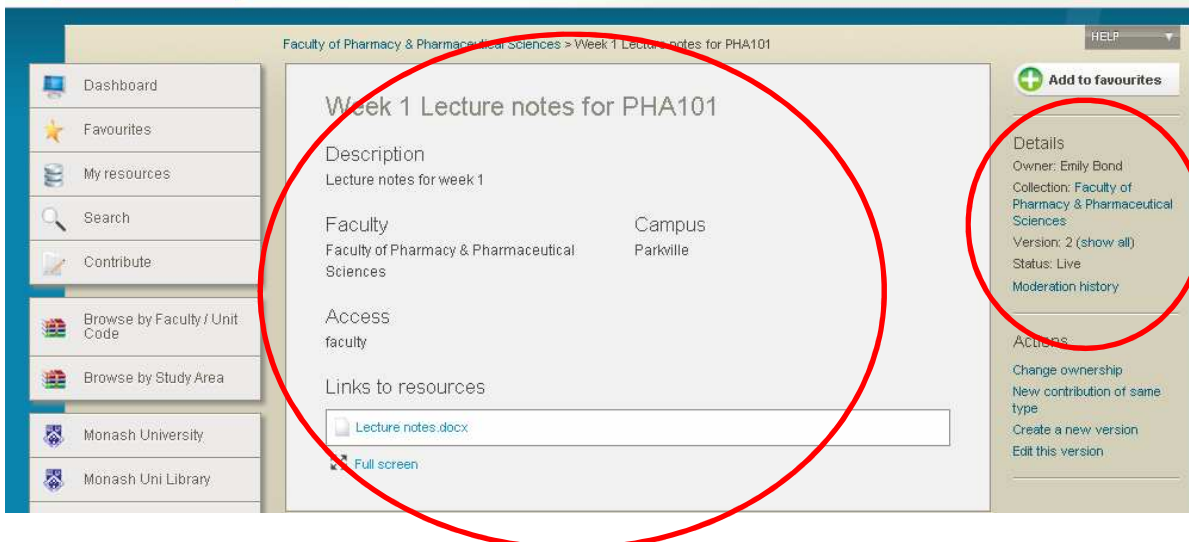


3. Click each of the subheadings to scroll through the full suite of resources *owned by you*

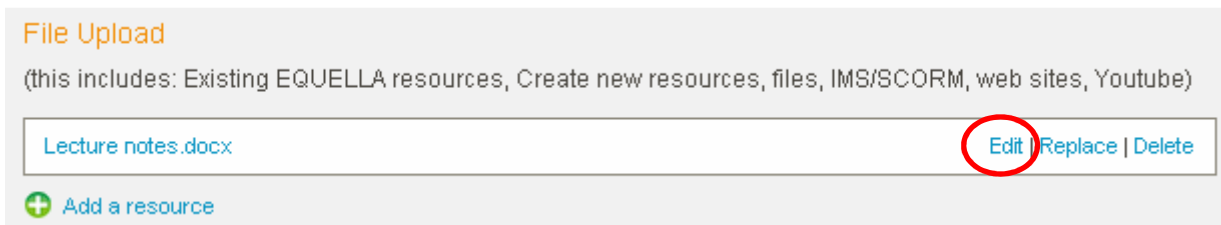
4. Locate the resource you want to edit under the **Results** heading in the centre of your screen

NB. If the resource you want to edit is not visible on the page, use the **sort** or **filter** function on the right of your screen to assist

5. Click the title of the resource you want to edit and review the information recorded about it:



6. Locate the **Actions** list at the bottom right of your screen and click **Edit this version**
7. Scroll down the page to the **File Upload** section
8. If you would like to simply add a new file/ attachment to the EQUELLA resource:
 - a. Click **Add a resource** button
 - b. Proceed to add your chosen file/ attachment (see [Add a resource to EQUELLA](#) section for further information)
9. If you would like to **make a change** within the file/ attachment:
 - a. Click on the **Edit** link next to the file/ attachment you would like to edit:



- b. Then click **Edit file with default editor**

NB. Editing a file with the default editor (eg. Microsoft Word for documents; Microsoft PowerPoint for slide shows, etc.) requires you to have a Java plug-in installed. EQUELLA will lead you to the appropriate plug-in download page at this time if you don't already have it installed.

- c. Update/ edit the file/ attachment in the default editor as required and **save** the file/ attachment
 - d. Close the default editor to return to EQUELLA
 - e. Click **Save**
 - f. Once you have been returned to the Resource screen, you should see a 'Successfully saved' message at the top of your screen
10. If you would like to **replace** the existing file/ attachment with a new file/ attachment:
 - a. Click on the **Replace** link next to the file/ attachment you would like to replace:

File Upload

(this includes: Existing EQUELLA resources, Create new resources, files, IMS/SCORM, web sites, Youtube)

Lecture notes.docx

Edit | **Replace** | Delete

[+ Add a resource](#)

- b. Work through the series of steps to upload a new file/ attachment in its place
- c. Once you have replaced the existing file/ attachment successfully, click **Save**
- d. Once you have been returned to the Resource screen, you should see a 'Successfully saved' message at the top of your screen

NB. If you **replace** the existing file in EQUELLA with a new file of the *same name*, any links to the file in Moodle will be updated automatically. If, however, the replacement file has a *different name*, you will need to return to the Moodle unit(s) in which a link to the file exists and update the links so that they point to the new replacement file.

11. If you would like to simply **delete** the existing file/ attachment:

- a. Click on the **Delete** link next to the file/ attachment you would like to remove from the EQUELLA resource:

File Upload

(this includes: Existing EQUELLA resources, Create new resources, files, IMS/SCORM, web sites, Youtube)

Lecture notes.docx

Edit | Replace | **Delete**

[+ Add a resource](#)

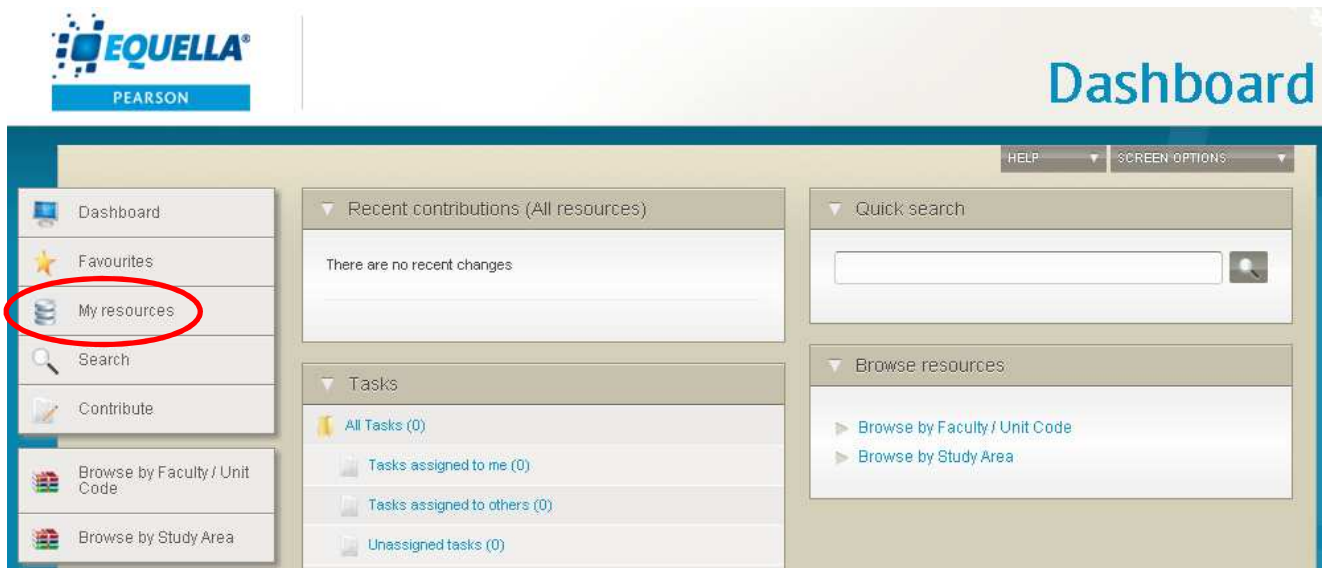
- b. Work through the prompts and then click **Save**
- c. Once you have been returned to the Resource screen, you should see a 'Successfully saved' message at the top of your screen

NB. If you **delete** an existing file in EQUELLA but then add a new file of the *same name*, any links to the file in Moodle will be updated automatically. If, however, the new file has a *different name* to the deleted file, you will need to return to the Moodle unit(s) in which a link to the file exists and update the links so that they point to the new file.

If you are not replacing the deleted file with a new file, please ensure you remove any corresponding links from Moodle accordingly.

Create a new version of a resource in EQUELLA

1. From the EQUELLA dashboard, click **My resources**:



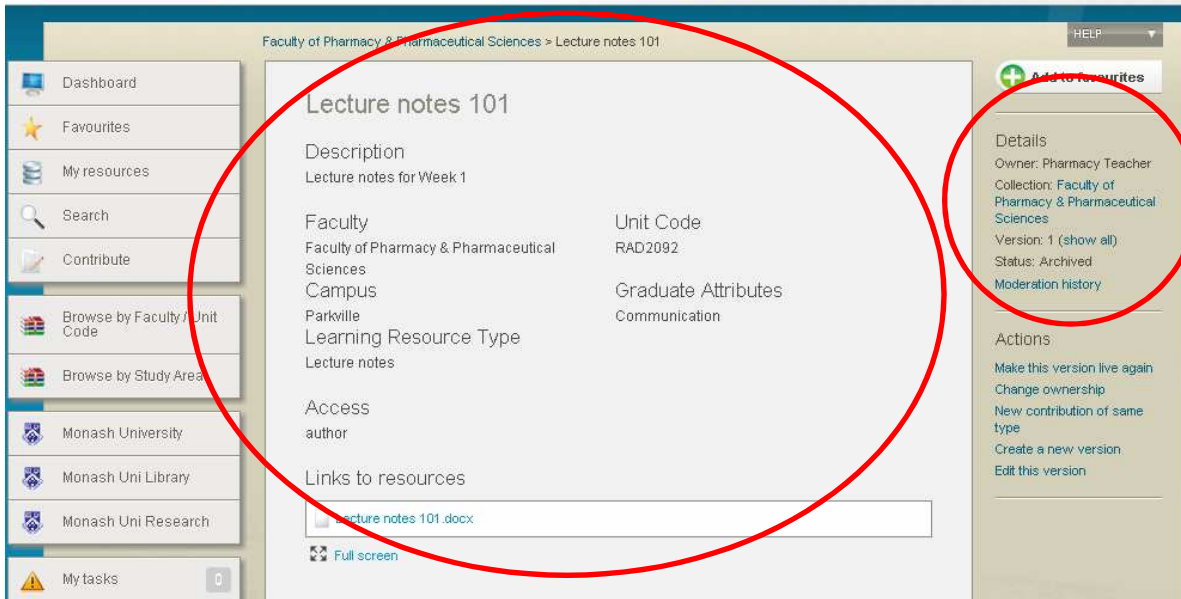
2. At the top of your screen, you will see a **My resources** heading with a series of subheadings below:



3. Click each of the subheadings to scroll through the full suite of resources *owned by you*
4. Locate the resource you want to edit under the **Results** heading in the centre of your screen

NB. If the resource you want to edit is not visible on the page, use the **sort** or **filter** function on the right of your screen to assist

5. Click the title of the resource you want to edit and review the information recorded about it:



6. Locate the **Actions** list at the bottom right of your screen and click **Create a new version**
7. Adjust the metadata pertaining to the resource as necessary and click **Save**

NB. Your faculty may have specific requirements when it comes to creating a new version of a resource (eg. specific naming conventions, the addition of a note in the Notes section, a need to alert certain individuals to the fact that you are creating a new version, etc.). Please see your Faculty Administrator about when each is appropriate for your faculty.

Once you have been returned to the Resource screen, you should see a 'Successfully saved' message at the top of your screen. You will also note that the version number now associated with the item has changed:

Successfully saved

Lecture notes 101 version 2

Description
Lecture notes for Week 1

Faculty	Unit Code
Faculty of Pharmacy & Pharmaceutical Sciences	RAD2092
Campus	Graduate Attributes
Parkville	Communication

Learning Resource Type
Lecture notes

Access
author

Links to resources

[Lecture notes 101.docx](#)

[Add to favourites](#)

Details

Owner: Pharmacy Teacher
Collection: Faculty of Pharmacy & Pharmaceutical Sciences
Version: 2 (show all)
Status: Live
Moderation history

Actions

[Change ownership](#)
[New contribution of same type](#)
[Create a new version](#)
[Edit this version](#)

To go back and view previous versions of the resource:

1. Click on the **show all** link next to the current version number
2. Select the version that you would like to view/ edit

Save a search

You may have a search that you anticipate using multiple times – one that you would like to save for future use. To save a search:

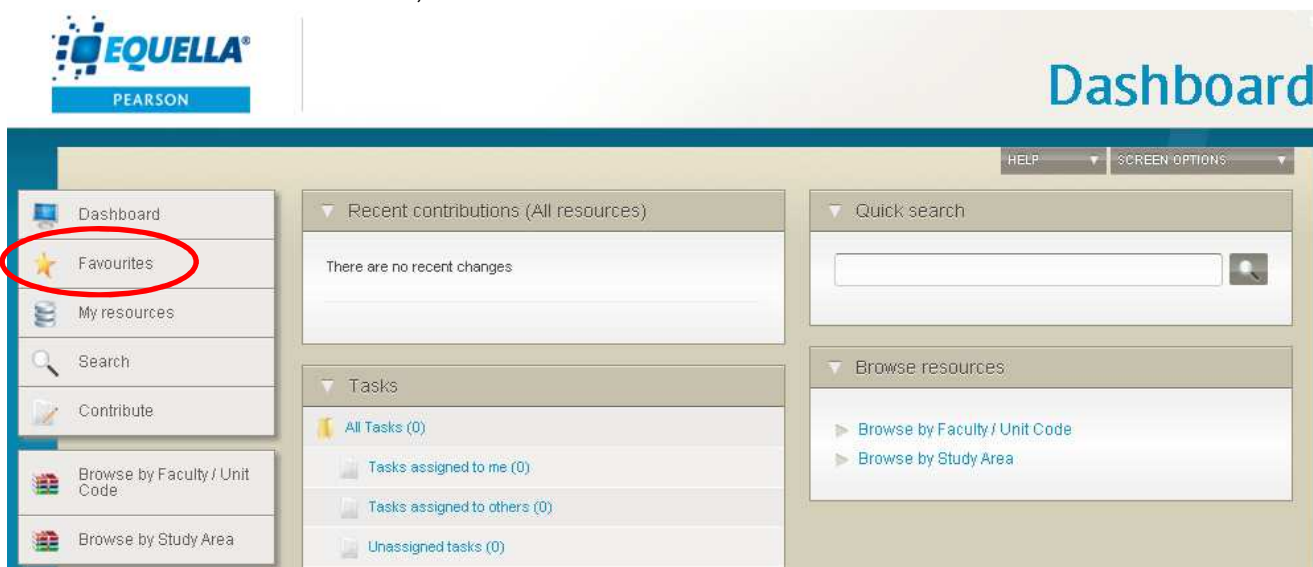
1. Once you have the results of a completed search on your screen, navigate to the **Add search to favourites** button on the right side of your screen:



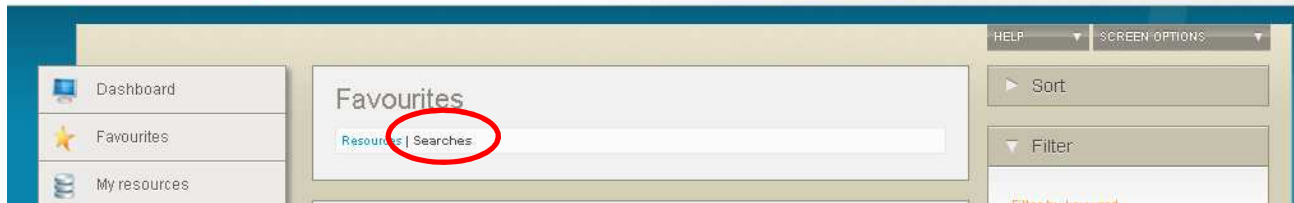
2. Click the **Add search to favourites** button, enter an appropriate name for the search and click **Add**
3. You should see a 'Successfully saved' message at the top of your screen

Reuse a search

1. From the EQUELLA dashboard, click **Favourites**:



2. Under the **Favourites** title, select **Searches**:



3. Browse the list of saved searches and select the one you are after
4. You will be taken to the Search screen where you can review the latest results for that search or amend/update the search as necessary

Appendix A: Edit a resource vs. create a new version

Prior to the start of each semester, teaching staff are given the opportunity to update their Moodle units with content relevant for the upcoming teaching period. With the introduction of EQUELLA, rather than uploading resources (eg. lecture notes, unit guides, etc.) **directly** into Moodle, teaching staff can add **links** to resources stored in EQUELLA.

It may be that there are resources in EQUELLA that are already fit for purpose and don't need to change from semester to semester. Examples may include study guides, videos and software. In this case, all the staff member would need to do is add a link to the **existing** EQUELLA resource in their Moodle unit (see [Add an EQUELLA resource in Moodle](#) section above).

Where there is a resource that does need to be **updated/ changed** to be made relevant for the upcoming teaching period, the staff member needs to ensure a **new version** of that resource is created before adding the link to their Moodle unit. The main reason why a new version must be created (and why the metadata and files within the resource can't just be edited directly) is that as a University, we are required to keep a record of the files/ resources that were used in each teaching period for each unit. If the resource were to be edited directly, old Moodle units would link to the updated resource/ file – a resource that was not 'valid' at the time of teaching. This would put the University in breach of its data retention/ archiving requirements.

As a result, it is recommended that the following process be followed when considering an update/ change to a resource prior to and over the course of a teaching period:

Steps to be undertaken just prior to the commencement of a new semester/ teaching period are as follows:

1. *For resources that are updated semester-to-semester (eg. tutorial/ lab instructions, assignments, lecture notes, etc.)*
 - a. The person responsible for the resource in question (eg. the Chief Examiner or lecturer) must create a new version of the resource in EQUELLA, prior to the start of semester (see [Create a new version of a resource in EQUELLA](#) section above)
 - b. Once the person responsible has finished creating a new version of the resource as necessary, he/ she needs to go through their Moodle units for the upcoming semester and update the links to EQUELLA resources such that they link to the recently created new version
 - c. If there are others who may have used this resource in the past, the person responsible needs to advise them to update their links (as required)
2. *For items that do not need to be updated semester-to-semester (eg. study guides, videos, software, etc)*
 - a. No action required (ie. No new versions need to be created; no updates to links in Moodle are required)

If the person responsible for an EQUELLA resource wants to make changes to that resource during a semester/ teaching period (eg. change the information about the item, update the attachments, etc.):

3. Determine whether a new version of that resource was created at the start of the current teaching period (see point 1 above) or whether the resource was retained 'as is' from previous teaching period (see point 2 above). This information can be discovered by looking at the moderation history of the resource (see [View resource moderation information](#) section above)
4. If a **new version** of the item was created at the start of the current teaching period (eg. tutorial/ lab instructions, assignments, lecture notes, etc.):
 - a. **Edit the resource directly** (see [Edit a resource in EQUELLA](#) section above)

5. If the item was retained from the previous teaching period (eg. study guides, videos, software, etc.):
 - a. Create a **new version** of the resource *before* you make any changes/ updates to it
 - b. Make changes/ updates to the new version of the resource as required
 - c. Determine who else had been using the previous version of the resource and advise them that there is a new version of the item available
 - d. Go into your Moodle units and change the links to the resources such that they point to the **new version** of the item

An example:

Let's say you have a Study Guide that has been used for the past three years and you want to use it again in Semester 1 2013. You simply retain the link to that resource in your Moodle unit(s).

In the *middle of Semester 1 2013*, you need to make some changes to that Study Guide. Because it was used in Moodle units over the past three years, those units need to continue to point to the Study Guide in its original form. So, you need to create a new version of the Study Guide so as not to compromise the integrity of the previous years' Moodle units.

This may need to be communicated if multiple units are using that Study Guide for Semester 1 2013 and thus they will need to update their links in Moodle as well so they are current/ valid for that semester.

KEY MESSAGE

When you want to update/ change an EQUELLA resource that has been used in a previous teaching period, create a new version first.

Appendix B: Linking to an entire EQUELLA resource vs. a file/ attachment

When adding a link in Moodle to an EQUELLA resource, teaching staff can do one of the following:

1. Create a link to the entire EQUELLA resource (ie. the metadata entered about the resource plus any files)
2. Create a link directly to a file **within** an EQUELLA resource

In general, *it is recommended that you link directly to a file **within** an EQUELLA resource* but the following table outlines when you might adopt each method of linking and the advantages/ disadvantages of each:

Linking method	When you might use it	Advantages	Disadvantages
1. Link to the entire EQUELLA resource	<ul style="list-style-type: none"> • When it is important/ appropriate for students to view the metadata for an EQUELLA resource and/ or previous versions of the resource 	<ul style="list-style-type: none"> • All updates/ changes made to an EQUELLA resource (including any changes to files) will flow through to Moodle without the staff member having to update any links in his/ her Moodle units 	<ul style="list-style-type: none"> • Linking to an entire EQUELLA resource means that students will see all of the metadata relating to the resource such as title, author, description/ keywords, etc. They will also have access to the previous versions of the resource. This information may not be appropriate for students to see • If you have several files in the one EQUELLA resource, it may be that students have to determine which is valid for them. The risk here is that they access the wrong version of a file or the wrong file altogether
2. Link to an individual file/ attachment within an EQUELLA resource	<ul style="list-style-type: none"> • When it is not necessary/ appropriate for students to view the metadata for an EQUELLA resource and/ or previous versions of the resource 	<ul style="list-style-type: none"> • Linking to a specific file means that students will not have access to all of the metadata relating to the EQUELLA resource it belongs to (eg. Title, author, description/ keywords, etc). In addition, they will not have access to the previous versions of the resource • If you have several files in the one EQUELLA resource, linking to a specific file means that students do not have to determine for themselves which is valid for them. The risk of accessing/ using the wrong version of the file (or the wrong file altogether) is eliminated 	<ul style="list-style-type: none"> • When a file within an EQUELLA resource is replaced with a file of the <i>same name</i>, the links in Moodle are directed to point at the replacement file. If, however, the replacement file has a <i>different name</i>, the current links in Moodle units pointing to that file need to be updated such that they point to the replacement file • If the replacement file (with a <i>different name</i>) was linked to in multiple Moodle units, multiple updates will be required. And if the Moodle units in which these links appear are managed by a number of staff members, each individual needs to be identified and told of the change so that they may go into their Moodle units and make their updates as required