

Query Builder

Hello, in this tutorial you will learn how the query builder is used in profiles and how you can create a query in Rialto.

Recommendation feeds and selection plans are based on queries that you can create and edit. You can see your existing feeds by going to Market > “My Feeds,” then select a feed.

The query builder allows you to outline the baseline filters for a recommendations feed or selection plan. Reviewing feeds and managing selection plans are covered in another session. A selection plan query works the same as a recommendation query, so we’ll use the recommendation profile in this tutorial as our example.

To create a new Recommendations profile you’ll go to Market > Recommendation profiles. Here you can either select an existing profile, or create a new one by clicking “Add Recommendations Profile”.

You’ll enter a profile name and description; and select a ranking profile. For more information about how to create ranking profiles please watch the “Ranking Profiles” tutorial.

Now you can add your filters. Filters define what the system will search for to show on the feed. In this case you only want items published no more than 5 years ago... you can set specific Library of Congress Classifications... set the item availability... and only items in English.

If you want the system to choose from one of several values, or create more advanced combinations, you can use the group functionality. First, you’ll add a group, and in this example you’ll set the readership level you want to General – Academic.

You can save a little time by duplicating this filter. You can select the “Copy rule” action that appears when you hover over a filter. You’ll add three more rows... then update them to the readership levels you want to search for. Now you have a group that is searching for four possible readership levels. However, we need to tell the system to find titles with any one of the four, rather than all of them. To do this, click on the line in front of the whole group and bring up the “AND/OR” toggle and select “OR.”

You can add as many groups as you need, including groups inside of other groups. These tools will allow you to create advanced queries.

To see whether your query is working as expected, click the “Run” button. Rialto will show the results of the current query, sorted based on the selected Ranking Profile.

When you're done click "Save".

Your query has now been added to the list of recommendation profiles. If you need to make any changes, just open the row action tool and click Edit.

This process is also used for creating queries for selection plans. Please watch the Selection Plan tutorial for more information.