Alma Administration – Resources  
Customizing Available Search Indexes

Alma searches start with choosing a search type and then a search index, which is the field in which to search, followed by the search term.

Depending on the search type, users will see a list of available search indexes relevant to that type. This is the case for Simple Searches from the persistent search bar, as well as for Advanced Searches.

In this session, you will learn how, as an administrator, you can configure which search indexes are available for simple searches, and which are available for advanced searches. This allows you to simplify the dropdown options that appear to users and to disable indexes that your institution never uses. You will also learn how to change the labels for local fields.

Local fields are fields in each record that you can use for information that is important to your institution. These start out with numbered labels, but you can change each local field label to reflect how that field is used in your institution. For example, you can change “Local field 902” to “Project Code,” and that will be the label that appears as the search index.

Open Alma Configuration. Open the Resources menu, and under Search Configuration, select Search Indexes. This table shows all the search indexes alphabetically by index code. Each one can be enabled or disabled with this toggle switch. The Simple Search and Advanced Search columns shows whether that index is displayed in the dropdown menu of each method of search.

Many institutions prefer to limit their simple search dropdown menus to a short list of the most frequently used indexes. The less frequently used indexes are removed from the simple search, but remain available in the advanced search.

Here’s how to do that. Locate the index you want to change. Click the row-action button and then Customize. Change the field in the Simple Search column from true to false. Leave the Advanced Search as true. You may customize more indexes the same way. Then click Save.

If there are some indexes that your institution never uses, you can disable them. For example, if your institution doesn’t use Dublin Core records, you may choose to get rid of all of those indexes, which start with “dc”.

Click the row-action button and then Customize. Switch the toggle to disable the index. Then Save. This index will not appear in either simple or advanced search, regardless of what is written in these columns. Disabling an index makes the option invisible to users. Therefore, we recommend thinking carefully before disabling an index, and, if you do, documenting that choice so that your staff is aware that they could choose to enable it in the future.

You may find it easier to locate a particular index by exporting the table with this Export List icon, and then opening it in Excel, where you can use filters and the Find tool.

If you want to know the Index Code for a Search Index Label, see the table in the Alma Online Help article Configuring What Search Indexes are Available.

Of these search index labels, only local field labels can be changed. Here is how to change how a local field is displayed. Open Alma Configuration. Open the Resources menu, and under Search Configuration, select Customize Indexes Labels. Locate the field and change the description. Then save. If you want this local field to be available as a search index, go back to the search indexes table, as we saw before. Enable the local field and set it to display for simple and/or advanced search, as desired.

You will need to sign out of Alma and then sign in again to see your configuration changes.

Thanks for watching!