Alma Essentials – Admin  
Creating Filtered Sets

A set of titles in Alma can be filtered to further refine it beyond the original saved query. For example, you can filter the set to contain only books of a certain size in centimeters, or only titles that have a 130 field. In fact, you can filter based on any field in the bibliographic record!

Filtering is done using indication rules, which test if selected fields of the record satisfy specified conditions. Indication rules can refine searches beyond what's available in Alma's search bar.

Let's see how to create a filtered set using an existing indication rule, and then how to create your own indication rule.

To create a filtered set of titles, enter a search query for the desired titles. On the search results page, click Save and Filter Query. In the Set Details page, give your set a name and enter other details as desired. Then, click Save and Filter. This opens the Filter set section, where you can select an Indication Rule to filter the set. For example, this rule will narrow down our set only to records that have more than one 050 field. Let's select this rule, which will filter for records where the 041 language code field has a value of English. Click Filter This Set. Confirm the filtering.

We can see the set based on our original query was created. Meanwhile, Alma is running a job to create the filtered set as well. When it's done, refreshing the page shows us our new filtered set. Note that this is an itemized set, meaning it won't update dynamically. You can always run another filter on the original set under options > Filter set. You can view the members of the filtered set under Members. Our set has been filtered down to around 3,000 titles, from an original query of around 4,000.

Now let's see how you can create your own Indication Rules, that can be used to filter sets. Open the Alma Metadata Editor. In the navigation panel, open the Rules tab, and select Indication. Here you can see the existing indication rules, divided into three folders. Private rules are your drafts visible only to you. Shared rules are created by you and your colleagues for the benefit of your institution. And Community rules are created by Alma users around the world for everyone's benefit.

To create a new indication rule, click New > Indication. Give the rule a Name and Description. In our case, we'll filter for Arabic titles. Select the rule Type. In this demonstration, we'll show how to create an indication rule using a user-friendly form, but you can learn about the powerful Drool and XSL options in the documentation. For Access Level select Shared, otherwise the rule won't be available in the Filter Set menu. For the Record Type we'll select Bibliographic, and for the record Format – MARC21. Click Save.

In the form we can now compose our rule. Let's add our first condition. First select the field. All MARC fields are available! In our example, we'll select 041. You can specify indicators, and a subfield, in our case, a. Click Done. So, we've selected the 041 field, with any value for the indicators (as indicated by the asterisks), subfield a. Now we can select an operator, in our example, Contains Phrase, and enter the desired phrase. We can add more conditions, if we like, using the plus icon here or here. For example, let's see if there's a populated 500 note field.

Our conditions are currently connected with a logical And. We can change this to an Or. You can copy a condition, via the copy icon, and change it. You can also add a nested rule group, where child groups will be evaluated before their parent groups. You can remove and individual condition or a group.

Once you are pleased with your rule, click Save. Your new indication rule can be found in the Shared folder.

To test your indication rule on a record, enter split mode, this opens the right pane in the editor. And search for a title. Click Edit Record. Then, back in the Metadata Editor, click the play button in your rule, to try it out on the record. The message banner on the bottom shows us the result. In this case, the evaluation of our indication rule on this record is false.

So that's how you create filtered sets of titles, and the indication rules used for filtering them.

Thanks for joining!