

Managing Recommendation Profiles and Feeds

To manage Recommendation Feed profiles, you must have one of the following roles:

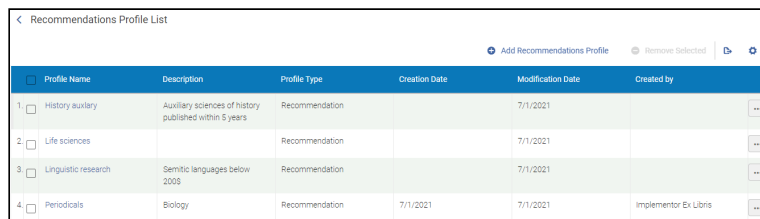
- Rialto Administrator
- Super Selector

Rialto Recommendation Feeds streamline the Selector's workflow by enabling them to see all offers in their selected subjects found in the Rialto marketplace, ranked in accordance to their preferences. Through the pairing of self- and institution-defined profile criteria with Rialto's data insights and machine-learning capabilities, Selectors can review best-fit offers with minimal effort.

Feeds begin at the administration level, through the creation of baseline institution-wide recommendation and ranking profiles. Once the profiles are in place, the library selection staff can begin refining their feed output to best suit their areas of expertise and feed purpose.

New offers matching the recommendation become automatically available in the feed. At any time, users can open a feed and purchase offers, add offers to a list, or dismiss unsuitable offers. An offer that has been dismissed will no longer appear in the user's feed view.

You can configure the institution-level recommendations profile that defines users' feeds on the Recommendations Profile List page (**Collection Development > Manage Profiles and Ranking > Recommendation Profiles**).



<input type="checkbox"/>	Profile Name	Description	Profile Type	Creation Date	Modification Date	Created by	
<input type="checkbox"/>	History auxiliary	Auxiliary sciences of history published within 5 years	Recommendation		7/1/2021		...
<input type="checkbox"/>	Life sciences		Recommendation		7/1/2021		...
<input type="checkbox"/>	Linguistic research	Semitic languages below 2008	Recommendation		7/1/2021		...
<input type="checkbox"/>	Periodicals	Biology	Recommendation	7/1/2021	7/1/2021	implementor Ex Libris	...

Recommendations Profile List

Managing recommendation feeds includes:

- [Creating a recommendation feed profile.](#)
- [Configuring the recommendation feed profile.](#)
- [Testing the recommendation feed profile.](#)
- [Editing a recommendation profile.](#)
- [Deleting a recommendations feed](#) when it becomes obsolete.

Rialto Default Recommendation Profiles

The following Recommendation Profiles are provided with Rialto out-of-the-box. Each of these profiles has a single rule defined in it. These profiles allow the selection staff to do their work in the first weeks after Rialto integration, before the institutional profiles are finalized. You can modify the profiles as you like, or leave them as-is while you are creating the

institutional profiles.

Profile	Rule	Description
Recent Publications	Published X years ago = '1'	Brings in all titles that were published within the last year
Ebook offerings for print holdings	Ebook offerings for print holdings = 'True'	Brings in all ebook titles that match print titles already held by the institution

Creating a Recommendation Profile

Note

In order to save a recommendation profile, a ranking profile must be selected for it. If you have not created a ranking profile yet (see [Managing Ranking Profiles](#)), you can use one of the [default ranking profiles](#) that Rialto provides. A different ranking profile can be applied at any time.

To create a recommendation profile:

1. On the Recommendations Profile List page ([Collection Development > Profiles and Rankings > Recommendation Profiles](#)), select **Add Recommendations Profile**. A dialog box opens.
2. Under **Choose name**, enter a name for the recommendation profile, and then select **Add**. A Query Builder page opens.
3. Use the Query Builder to configure the criteria by which you want to filter the offers that appear in the recommendations feed, as explained under [Configuring the Recommendations Feed Profile](#), below.
4. When you have defined all the criteria, select the ranking profile at the top to define the order in which the offers will be displayed in the feed. When viewing the feed results, the Selector can select another ranking directly from the feed.
5. On the right-hand side, under **Profile Description**, enter a description for your profile (optional).
6. Select **Save**. The profile is saved.

Configuring a Recommendation Profile

A profile is composed of one or more rules that filter the offers that will be included in the recommendations feed.

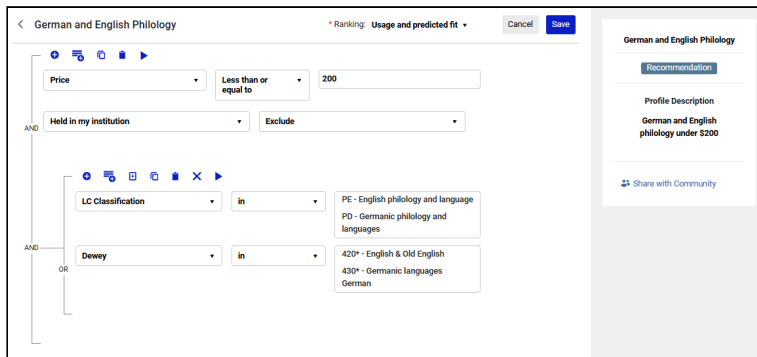
The rules you define are organized into one or more groups. By default, the logical relationship between the individual rules in each group, and between the groups of rules, is AND. This means that each criterion must be true for a resource to appear in the feed. For example, you might specify a "Price" limit AND a "Year published" limit. If a resource is outside of either limit, it will not appear in the feed.

You can change the relationships between the individual rules within a group, or between groups on the same level, to OR. In this case, resources that match any of the criteria in the group will appear. For example, you might specify several "Readership level" limits with an OR relationship. In this case, a resource that matches any of the listed readership levels will appear in the feed.

Note that only the criteria that you include in the profile are used to filter the offers in the feed. Criteria that you did not include in the profile do not affect the feed. For example, if "Price" was included in the profile, the feed will show only offers

in the range that you specified. But if "Price" was not included as a criterion, the feed will show offers of any price.

For more information, watch [Query Builder](#) (3 mins).



Recommendation-Feed Criteria

To configure a profile:

1. A new profile contains a single rule in a single group, with default values selected. Modify the rule as required: Select a parameter by which to filter the offers in your feed, an operator to include or exclude specific offers, and a value for the parameter.

For more details about the parameters, see [Parameters Included in the Recommendations Profile](#).

2. To add additional rules, do one of the following:

- To add another rule, above the first rule, select



.

- To duplicate a rule:

1. Hover over the the rule. Editing controls for the rule appear to its right.

2. Select



. A copy of the rule is added below it.

3. Edit the new rule as necessary.

- To paste a copied rule from your clipboard, to the right of the rule under which you want to add the copied rule, select



. (See [Copying Rules from a Recommendation Profile](#), below.)

3. To add a group of rules, above the group under which you want to add the new group, select



. Add as many rules as necessary to the new group, as explained in the previous step.

4. To change the relationships between the groups, select any of the Boolean operators between the rules. Flags for AND and OR appear at the top of the group. Select one of the flags to select that type of a relationship. To stop displaying these flags, click again on any of the Boolean operators.

5. To remove a rule, hover your cursor over the line to display editing controls to its right, and select **Remove rule** (



) to remove the line. To remove an entire group, above the group, select **Remove group** (



6. When you have defined all the rules, at the top of the page, select the [ranking profile](#) to use. The settings of the profile define the order in which the offers will be displayed in the feed. When viewing the feed results, the Selector can select another ranking directly from the feed.

Note

The ranking profile must already be created at this point. If it wasn't created yet, you can use the [default ranking profile](#) that Rialto provides.

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7. Prior to saving your selections, test the profile to validate that it brings the desired results. See [Testing a Recommendations Feed Profile](#).
8. Click **Save** to save your selections. You are directed to the Recommendations Profile List page, where you will find your new ranking profile.

Parameters Included in the Recommendations Profile

Parameter	Description
Accessibility Information	Use to filter offers based on whether they have accessibility details.
Added X weeks ago	Enter the numerical amount of weeks from the current date. This allows you to focus on offers that have been recently added to the Rialto catalog.
ATO Available	Use to show or hide ebooks that are available as Access to Own under a DDA plan.
Author	Use this field to search by the author's name.
Author Affiliation *	Use to search for titles that have been written by authors associated with your university. These values are manually assigned to offers by the New Titles team when treating titles.
Availability	Select a value to display titles that are yet to be published, out of print, in stock or available to purchase. The " In Stock " value is to assist users in quickly identifying items with multiple quantities on hand in warehouses (Currently, only for North America). <hr/> Note 'Available to purchase' does not mean the item is in stock with a provider. It may need to be sourced from the publisher. <hr/>
Available X weeks ago	Enter the numerical amount of weeks from the current date. This field captures new offers added to the marketplace that are available for purchase, and offers that were previously cataloged, but are newly made available. For example, when an offer previously flagged as "Not Yet Published" becomes available per the publisher/platform.

Parameter	Description
Award Name	Use to narrow offers in feeds and Selection Plans down to those that have ever been nominated for and/or received a specified award. Award information is acquired by Rialto from Proquest Syndetics .
Award Result	Use to narrow offers in feeds and Selection Plans down to those having award recipients or to those having award nominees. Award information is acquired by Rialto from Proquest Syndetics .
Award Year	Use to narrow offers in feeds and Selection Plans down to those having award recipients and/or nominees in a specified year (or NOT in a specific year). Award information is acquired by Rialto from Proquest Syndetics .
Binding	Enter the type of binding of the offer. Rialto supports over one 120 binding options, any of which could display here, regardless of the format selected.
Book Type *	Use to search for unique titles that fall under a specific type of publication, such as dissertation or textbook. These values are manually assigned to offers by the New Titles team when treating titles. For a complete list of available values, see Book Type Values .
Collection	Search for a specific collection name, or select a platform to then view the first set of results.
Country of Publication	Enter the country of publication of the offer. If needed, the city of publication can be viewed in the offer details.
DCR available (Ebooks)	Use this field to show or hide ebooks that are available to be added to the DCR pool.
DDA available (Ebooks)	Use this field to show or hide ebooks that are available to be added to the DDA pool. <hr/> Note On DDA profiles page, this does not appear because this is already configured as selected. <hr/>
Dewey	Enter a three-digit number to begin searching for the level of the classification you want to include or exclude.
Downloadable (Ebooks)	Use to show or hide ebooks that can be downloaded by patrons.
DRM free	Use to show or hide ebooks that have no digital rights-management assignment.
Ebook offerings for print holdings	This unique filter pulls in your institution's print holdings and matches them to the corresponding ebooks available in the marketplace.
Edition Type *	Select edition types to include ("in") or exclude ("not in") from the list.
Format	Enter the format of the offer: print, e-book, or other, which includes all the alternative formats, such as various audio and video formats, and offers that include CD-ROMs, maps, music scores, video games, etc.
Genre *	Enter genre to include or exclude offers that are part of a listed category. These are manually assigned to offers by

Parameter	Description
	the New Titles team.
Held in my institution	<p>Use to include or exclude your institution's holdings from feed results. The holdings data is pulled directly from what is available in Alma, helping to prevent duplicate purchases, or facilitating the purchase of additional copies of highly-used materials.</p> <p>Holdings includes print and electronic titles that are owned by the institution, as well as electronic titles that are included in an active subscription.</p> <p>By default, Rialto is configured to show holdings that are suppressed. Administrators can configure the system to hide suppressed holdings by changing the value of the <code>rialto_prevent_publish_and_display_suppressed_holdings</code> parameter. For additional information, see Configuring Rialto Settings.</p>
Interdisciplinary Studies *	Select this option to focus on offers under an area of study that crosses multiple disciplines. These values are manually assigned to offers by the New Titles team. For a list of offers, see Interdisciplinary Studies Subject Areas .
ISBN	Search by full ISBN (10 or 13 digit). You can search for multiple ISBNs at one time (the amount of ISBNs that you can search for is limited to 256 characters in total). To do so, enter the ISBN's into "ISBN" marketplace search with a comma placed between number sets.
ISSN	Search by full ISSN to retrieve offers that fall under a specific serial publication.
Keyword	Enter a keyword, or several keywords separated by comma (,). Rialto finds any titles with the keywords in the title, author name, publication year, and series title. For example, searching for "Harry Potter Rowling 2020" finds all works with "Harry Potter" in the title and with Rowling as the author released in 2020.
Language	Enter the language in which the offer is available to purchase.
Last Sold X years ago	This allows for filtering by materials sold during the past eleven years by ProQuest, enabling users to focus on items with verified sales to reduce potential noise when performing a broader search.
LC Classification	Select one of the main classes of the Library of Congress classifications, or drill down to the next level in the hierarchy.
LC Subject	Enter the LC enter the subject name to refine feed output by Library of Congress Subject Headings.
License	Enter the available e-book license types offered by the platforms: Single User, Three User, Concurrent, Unlimited, Non Linear Lending.
Newest edition for held titles	Match owned titles with the most recent editions published and available in the market.
NLM Classification	Select one of the main classes of the NLM (National Library of Medicine) classification, or drill down to the next level in the hierarchy. For details, see NLM Classification .
Platform	Select the electronic platform on which the title is made available. Rialto holds all available platforms in ProQuest, and will continue to grow to provide a vendor-neutral marketplace.
Predicted to be treated	Use this to focus on materials that have not yet been reviewed by our New Titles team, but are expected to be reviewed by them. The New Titles team locates and evaluates newly published content and provides enhanced metadata to enable optimal collection management activities.

Parameter	Description
	<p>This criterion can be used to limit the list of offers to a certain number of offers that are expected to be ranked most likely to be reviewed by the New Titles team: 500,000; 1,000,000; and so on. The larger the quantity selected, the lower the chances that any particular offer in the list will be reviewed.</p> <p>The ranking of titles for this feature is based on the analysis of a range of data about each work:</p> <ul style="list-style-type: none"> • Metadata fields of the work, including LCC and Dewey subjects, binding, country of publication, readership level, language, author, publisher, publication date, and price • Data derived from the workgroup to which the work belongs: <ul style="list-style-type: none"> ◦ Historical sales information ◦ Age of the work compared to those of other works in the workgroup ◦ Edition of the work compared to other editions in the workgroup ◦ Size of the workgroup
Price	Select this option to refine your feed output by list price. Choose your operator to include or exclude offers above or below a given list price.
Publication Type	Select the category of titles that you would like to include or exclude. Present categories are reprints and self published.
Published X years ago	Enter the numerical amount of years from the current year. Rialto finds any titles published in the range from the current year to the indicated number of years.
Publisher (contains)	This option allows for you to enter free text within name field, and when used in a search will either include or exclude all related values that contain the text entered. For example, using the phrase "university press" will search for all publishers that contain the text "university" and "press" within their name.
Publisher (exact)	This option allows for you to enter text within the name field, however, you are required to select an exact publisher name after entering text, and when used in a search will either include or exclude all the values that fall within the exact name selected. For example, after entering the phrase "university press," you must select a publisher name before performing the search. If no name is selected the page will display an error (within the query builder) or return no results (advanced search).
Publisher lists	Enables administrators to create a list of publishers for other staff to include or exclude from queries. For more information, see Publishers Lists .
Publisher Type	Use this filter to exclude or include titles that are known to be offered by publishers that focus primarily on reprinted or self published materials.
Readership level *	Enter the readership level of the offer. Some offers may have multiple readership levels, so when you apply a filter for one level you might see other levels returned in your results. These values are manually assigned to offers by the New Titles team.
Reading List Course Dates	<p>This parameter allows you to filter recommendations based on the course date range of the Leganto reading lists associated with a title.</p> <p>It supports the following values:</p> <ul style="list-style-type: none"> • Current – restricts results to titles that appear on reading lists for courses that are active today • Future – restricts results to titles that appear on reading lists for courses with upcoming start dates
Reading List Tags	This parameter filters recommendations according to institution-specific tags applied to reading lists in Leganto.

Parameter	Description
Regional Focus *	Select a region to find offers with content that is about or features specific geographic areas. You can select the areas in the drop down or search. These values are manually assigned to offers by the New Titles team.
Review Source	Use to refine offers by review source.
Screen Reader Friendly	Use to include or exclude offers that support screen reader functionality.
Series title *	Use to refine by offers that fall under a specific series title.
Series Type *	Use to refine by offers that have a specific series type.
Short Term Loan (Ebooks)	Use to show or hide ebooks that are available as Short Term Loan under a DDA plan.
Subject	Use to refine searches by normalized subject values, eliminating the need to navigate through specific LCC and DDC trees to find books under broad categories. The Subject field follows the same pattern as the existing "Binding" field, supporting the "in/not in" operators and enabling search and multi-select of newly indexed subject values.
Title	Search by a full title or a part of title.
Treated Titles *	Use this to focus on materials that have been reviewed by our New Titles team. The New Titles team locates and evaluates newly published content and provides enhanced metadata to enable optimal collection management activities.
Treated X weeks ago *	Enter the numerical amount of weeks from the current date. This allows you to focus on offers that have been recently treated by the New Titles team.
Year of publication	Enter the publication year for the title(s) you are targeting.

Note

Values marked with an asterisk (*) apply only to content treated by the New Titles team. These fields will not retrieve newly added content as of June 2026 and the volume retrieved will decrease gradually over time from now until June 2026. For now, they remain available to support back-runs and historical queries.

Testing a Recommendation Profile

Before publishing the profile to users, it may be a good idea to validate that your recommendations profile brings the desired results, and if it does not, edit it some more.

You can test your entire profile or only a single group of criteria within the profile.

To test a recommendation profile:

- Once you have created your profile, click



. You can click it for the entire profile or for a single group of criteria within the profile.

The screen splits and the feed resulting from the profile appears on the left. If you like the result, click **Save**. If not,

close the feed by clicking **X** in the upper-top corner and edit the profile.

Editing a Recommendation Profile

To edit a recommendation profile:

1. On the Recommendations Profile List page (**Collection Development > Manage Profiles > Recommendations Profile List**), check a profile that you would like to edit.
2. Make the necessary changes. You can modify name and description, modify configuration, and change the ranking profile.
3. When done, select **Save**.


Note

After a recommendation profile is first saved, feeds will only inherit edits made to the base query. Any modification to the name, description, or a change in ranking profile used will not carry over to the feeds.


Copying Rules from a Recommendation Profile

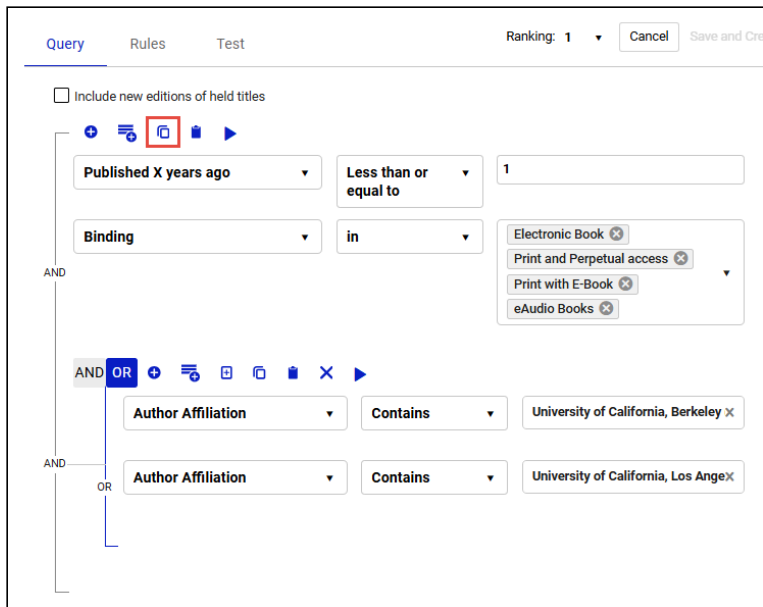
Rules can be copied individually or as groups. The copied rules can be pasted into a Recommendation Profile, Selection Plan, or other profile, or they can be pasted into a text file for transmission to other environments.

To copy a rule:

- Hover over the rule, and then, when its editing controls appear to its right, select **Copy rule** (). The rule is copied to your clipboard in JSON format.

To copy a group of rules:

- Above the group, select **Copy group** (). The group of rules and their logical relationships are copied to your clipboard in JSON format.



Copy Group Button Above a Group of Rules

You can paste a copied rule or group of rules below any existing rule or group of rules in a profile. To paste them below an existing rule, hover over the rule, and then, when the controls appear to its right, select **Paste** (



). To paste them below an existing group of rules, above the existing group, select **Paste** (

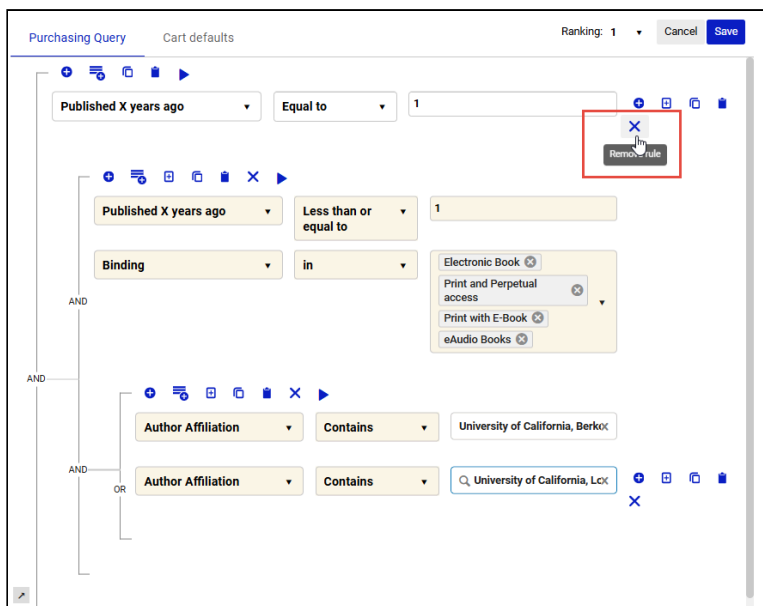


).

Note that if you want to *replace* existing rules with the rules you are pasting, you must do this in two steps: first paste the copied rules, and then use the **Remove rule / Remove group** (



) option to delete the existing rules. If the rule you want to delete is the top-level group of the profile, hover over the group to display the editing controls, and then select the **Remove rule** button.



Copied Group of Rules Pasted Below the Top-Level Group, with the Remove Rule Option Shown

Copied rules are formatted in JSON and can be viewed and saved by pasting them into a text file. The JSON can later be copied from the file and pasted into a profile, as described above.

```
{
  "condition": "and",
  "rules": [
    {
      "field": "~pubage",
      "type": "positiveNumber",
      "value": 1,
      "operator": "<=",
      "new": false
    },
    {
      "field": "binding",
      "type": "category",
      "operator": "in",
      "new": false,
      "validationErrorMessage": "qb.required_field",
      "value": [
        "Electronic Book",
        "Print and Perpetual access",
        "Print with E-Book",
        "eAudio Books"
      ]
    }
  ],
  {
    "condition": "or",
    "rules": [
      {
        "field": "authaffildesc",
        "type": "autocomplete",
        "operator": "=",
        "new": false,
        "validationErrorMessage": "qb.required_field",
        "value": "University of California, Berkeley (Main Campus)"
      },
      {
        "field": "authaffildesc",
        "type": "autocomplete",
        "operator": "=",
        "new": false,
        "validationErrorMessage": "qb.required_field",
        "value": "University of California, Los Angeles (UCLA)"
      }
    ]
  }
]
```

Copy of a Group of Rules Pasted into a Text Editor

Deleting a Recommendation Profile and Its Feed

Deleting a recommendations profile will remove the feed for all selectors. The next time the selector views their list of feeds, they will no longer see the deleted recommendations feed associated with the deleted profile.

To delete a recommendation profile:

1. On the Recommendations Profile List page (**Collection Development > Manage Profiles > Recommendations Profile List**), check one or more profiles that you would like to delete.
2. Select **Remove Selected** above the list. The profiles are removed.