

Indication Rules

Indication rules are created in the Metadata editor and are used to filter sets of records. Indication rules are generally quite simple, and look like this:

rule "Retrieve all records which contain a 336 and a 337 and a 338 field"

when

((exists "336") AND (exists "337") AND (exists "338"))

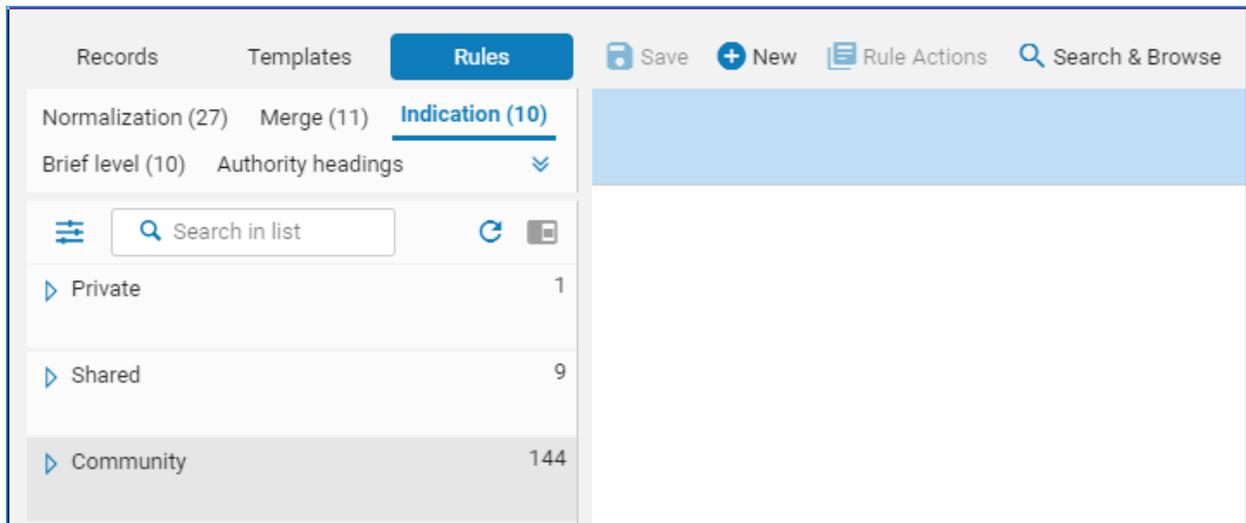
then

set indication."true"

end

Ex Libris has a [webpage with examples](#) of indication rules.

1. Creating the indication rule. Open the metadata editor, and you will see that rules are found under the Rules tab.



You can click on the categories, Private, Shared, and Community, to find your rules or rules shared by others from the community.

The easiest way to create a new rule is to copy one from the community, but you can also create a new one from scratch by clicking on New and selecting Indication.

- a. To copy a rule, click on it to highlight it. The rule will appear in the right pane.
- b. Right-click the rule and select Duplicate.

Records Templates **Rules**

Normalization (34) Merge (16) **Indication (31)**

Brief level (11) Authority headings

Search in list

505 exists
Drool

520 existe
Drool

540_present
Drool

555u.xml exists

View
Duplicate
Properties

- c. A dialog appears – you can change the name and the description. It is best to leave the rule “Shared” otherwise you cannot use it. Click Save.

Duplicate Rule

Name *
Copy Of 505 exists

Description *
505 exists

Type
 Form Drool XSL

Access Level
 Private Shared

Last updated by
System (May 31, 2020)

Contributed by
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Cancel Save

- d. The rule is now saved to the Institution’s shared folder and can be used to filter sets. If you need to edit the rule, you can in the right pane and click Save to save it.
2. Using the indication rule to filter a set of records and create a set of records that meet the criteria of the rule.

In this example we have a rule which is looking for titles that begin with “Nickel.”

```
rule "Title has Nickel"  
when  
  (exists "245.a.Nickel*")  
then  
  set indication."true"  
end
```

We have a set of 11 records- two of them begin with the word “Nickel” in the title. After we filter the set with the indication rule we get a new record set with 2 records in it.

Click on the row action menu next to the set you want to filter and click on Filter set.

The screenshot shows the 'Manage Sets' interface with the following details:

- Page title: Manage Sets (1 - 20 of 321)
- Search bar: Set name []
- Sort by: Creation Date []
- Scope: All []
- Status: All []
- Clear All button
- Set 1: Ehrenreich set (Physical titles, Institution only, Set ID 11041577640006076, Created by Administrator, Alma, Created On 03/03/2026 02:48:40 PM, CST)
- Set 2: state docs 2 (All Titles, Institution only, Set ID 11041568050006076, Created by Administrator, Alma, Created On 02/25/2026 09:05:23 AM, CST) - Context menu is open with 'Filter Set' highlighted.
- Set 3: state doc - itemized - 02/25/2026 08:58:59 AM, CST (All Titles, Institution only, Set ID 11041557590006076, Created by Administrator, Alma, Created On 02/25/2026 08:59:02 AM, CST)
- Set 4: THES4 Items (Physical items, Set ID 11041557590006076, Created by Administrator, Alma, Created On 02/25/2026 08:59:02 AM, CST)

In the form that appears select the indication rule in the top box and click Filter.

Filter Set

Indication Rule*

Title has Nickel

New Filtered Set (Itemized)

Set name*

Ehrenreich set - filtered - 03/03/2026 02:54:17 PM, CST

Content origin

Institution only

Private

Description

Enter description

Active

Note

Enter note

i Submitting this process will create an itemized set from set with 11 members.

Note: this job might take a while, you will be notified upon completion

Cancel

Filter

Here are the members of the newly created set:

< | **Physical Titles** (1 - 2 of 2)

Set Name: **Ehrenreich set - filtered - 03/03/2026 02:54:17 PM, CST**

| Sort page by: **Rank** ▼ ⚙️ | Secondary sort page by: **Rank** ▼ ⚙️ | Expand: *Select a value* ▼

1  **Nickel and dimed : on (not) getting by in America / Barbara Ehrenreich.**

Book (Book - Physical) text; unmediated; volume
 By Ehrenreich, Barbara. (New York : Metropolitan Books, 2001.)
 Subject Working poor--United States. ; Work--United States. ; Poverty--United States. and others
 Modification Date 05/02/2025 03:18:27 AM, CDT
 Edition 1st ed.

P ● Physical (2)

2  **Nickel and dimed : on (not) getting by in America / Barbara Ehrenreich.**

Book (Book - Physical) text; unmediated; volume
 By Ehrenreich, Barbara. (New York, N.Y. : Henry Holt, 2002, ©2001.)
 Subject Poverty ; Minimum wage. ; Poverty. and others
 Modification Date 05/02/2025 03:18:20 AM, CDT
 Edition 1st Owl books ed.

P ● Physical (1)

3. We can also do the opposite. Using the indication rule to filter a set of records and create a new set of records that exclude the criteria of the rule.

In this example we have a rule which is looking for titles that do not begin with “Nickel.”

```
rule "Title has Nickel"
when
(not exists "245.a.Nickel*")
then
set indication."true"
end
```

Notice that the third line in this rule is “not exists” so it will search for titles that do not start with “Nickel.”

When we filter our original set again with this rule our results exclude the two records with a title beginning with “Nickel” leaving 9 records.

< Physical Titles (1 - 9 of 9)

Set Name: Ehrenreich set - filtered - 03/03/2026 03:01:58 PM, CST



Sort page by: **Title** ▾ ↓

Secondary sort page by: **Rank** ▾ ↓

Expand: Select a value

1



Bait and switch : the (futile) pursuit of the American dream / Barbara Ehrenreich

Book (Book - Physical) text; unmediated; volume

By Ehrenreich, Barbara. (New York : Metropolitan Books, 2005.)

Subject Displaced workers--United States. ; White collar workers--United States. ; Downward mobility (Social sciences)--United States. and others

Modification Date 09/22/2024 07:31:07 AM, CDT

Edition First edition.



P ● Physical (1)

2



Blood rites : origins and history of the passions of war / Barbara Ehrenreich.

Book (Book - Physical) text; unmediated; volume

By Ehrenreich, Barbara. (New York : Metropolitan Books, 1997.)

Subject armed conflicts. ; wars. ; 89.76 polemology. and others

Modification Date 05/10/2025 03:32:00 AM, CDT

Edition 1st ed.



P ● Physical (1)

3



Complaints and disorders : the sexual politics of sickness / Barbara Ehrenreich

Book (Book - Physical) text; unmediated; volume

By Ehrenreich, Barbara, (Old Westbury, N.Y. : Feminist Press, ©1973.)