

Heurist tutorial

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How-to

Filter data

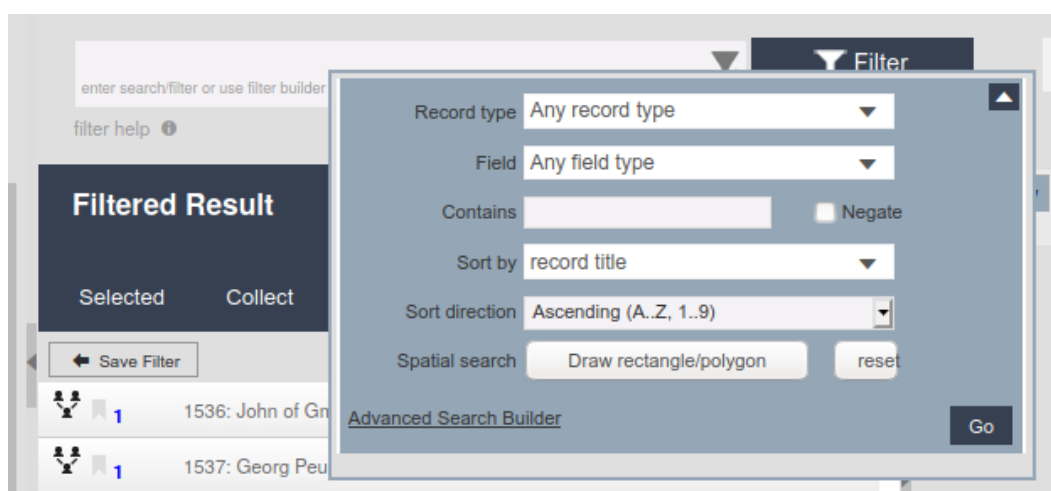
Filter

HEURIST Context Help - Advanced Search

HEURIST Help Basic, Quick, Advanced, and Faceted searches (filters) Basic search: Words typed in the filter field are matched against any part of the record titles (only). This is very good for quickly retrieving records where you know what words are likely to appear in the title and the set of results will

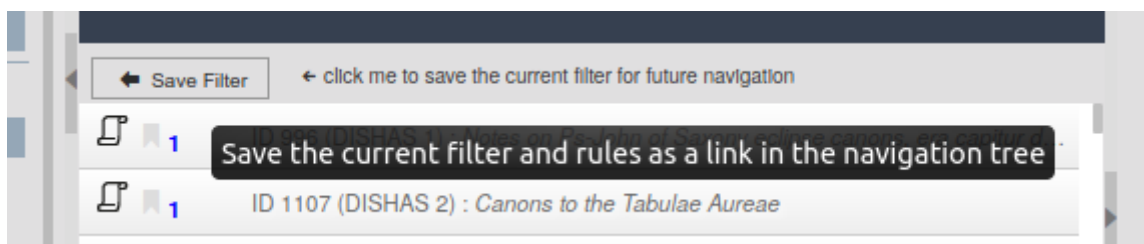
https://heurist.huma-num.fr/heurist/context_help/advanced_search.html

The first way you can select certain types of records is with filters : the filters do not intersect different record types, but restrict the set of results based on the value of certain fields.

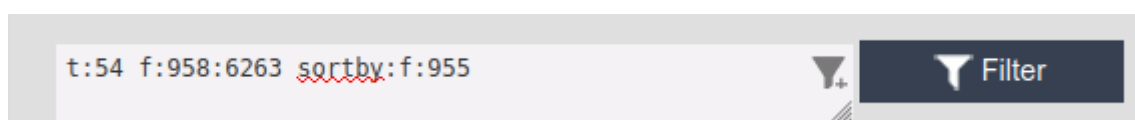


Filters can be easily configure by clicking on the funnel icon that opens a form interface to help you formulate the filter. Click on "Go" and a results set will

appear in the central table with the records corresponding to the filter.

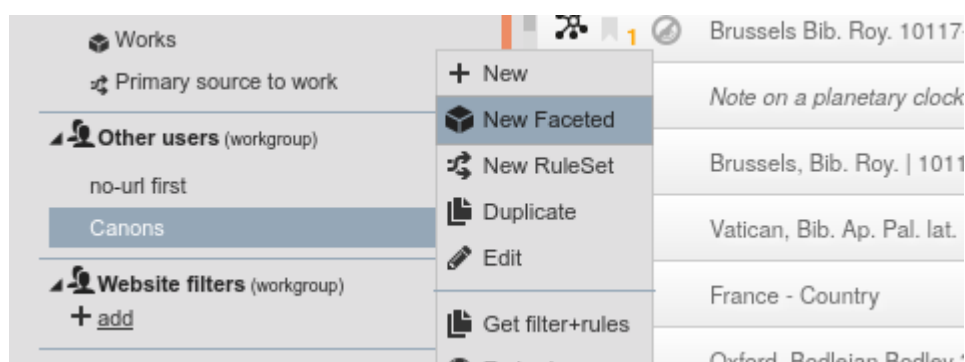


You can save this filter by clicking on the "Save filter" button on the upper part of the results table: in the modal that appears, define a name and other kind of metadata for this filter. It will then appear in the menu on the left.



You can access the "raw expression" of this filter by clicking on the eye icon in the search bar.

To perform more complex query, right-click on the left menu to choose between more advanced features.

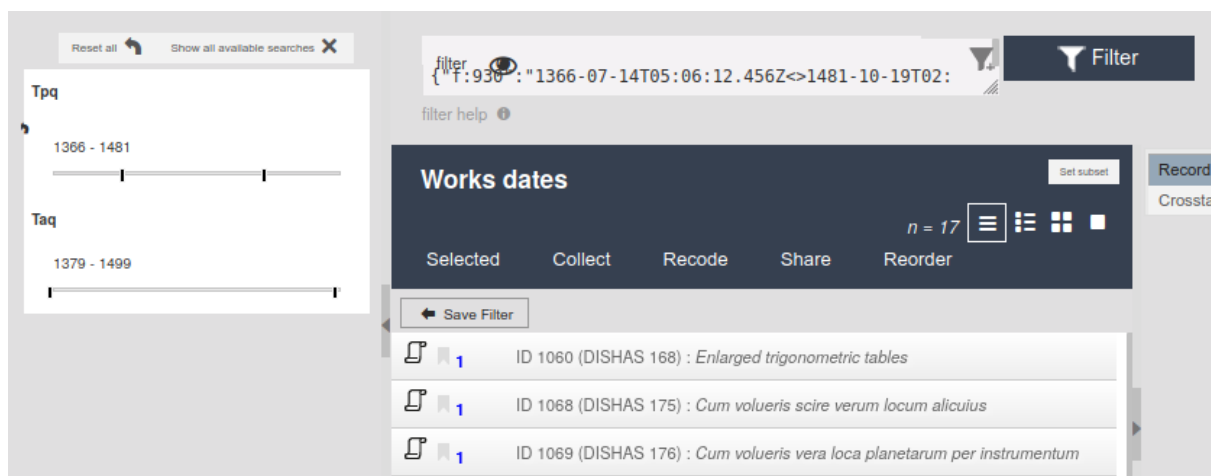


Faceted search

Faceted searches allow the user to drill-down into the database on a set of pre-selected database fields

Faceted searches allow to create an interactive interface for one or more particular record types, where the user will be able to find records of that type corresponding to particular points of interest. For example, you can create a faceted search to find works based on their creation dates:

1. Right click on the left menu and select **New Faceted**
2. In the modal that appears, choose the record type(s) on which you like to create the faceted search
3. Define the name of the search as well as the sub-group in the left menu in which it will appear
4. Check the fields that are relevant to be filtered (in our case: Minimal date and maximal date)
5. Define the appearance of the faceted form (e.g. slider or list to filter on a value?) and validate



Rule set

A rule set does not perform a search. However it applies rules to current result set and expand the initial search to a larger set of records by following a set of rules specifying which pointers and relationships to follow (including relationship type and target record types)



A **rule** describes the set of pointers and relationships (including reverse pointers) to follow from each of the records in the initial selection set (i.e. the results of a search) in order to add related records to the current result set. A rule can comprise several steps out from the initial selection set.

For instance a rule building on a search that retrieved a set of menus might add a number of recipes referenced by the menu which in turn might add a number of ingredients referenced by the recipe; however this rule will not add the restaurants which reference the menus or the chefs referenced by the recipes as their creator. These would each be a separate rule starting from the initial set of menus (Menus << Restaurants and Menus >> Recipes >> Creators).

Rule sets may contain several rules. Rule sets can be saved - they appear in the rule sets section of the navigation panel - and can be applied to any set of records retrieved by a search. Rule sets are also saved as part of the saved search when the search is saved after applying a rule set.

When a rule set is applied, it operates on the initial selection set resulting from the query. Each rule set applied replaces the results of the previous rule set - they are not additive. If you need to apply several rules to build the set of records you require, they should all be defined in one rule set.

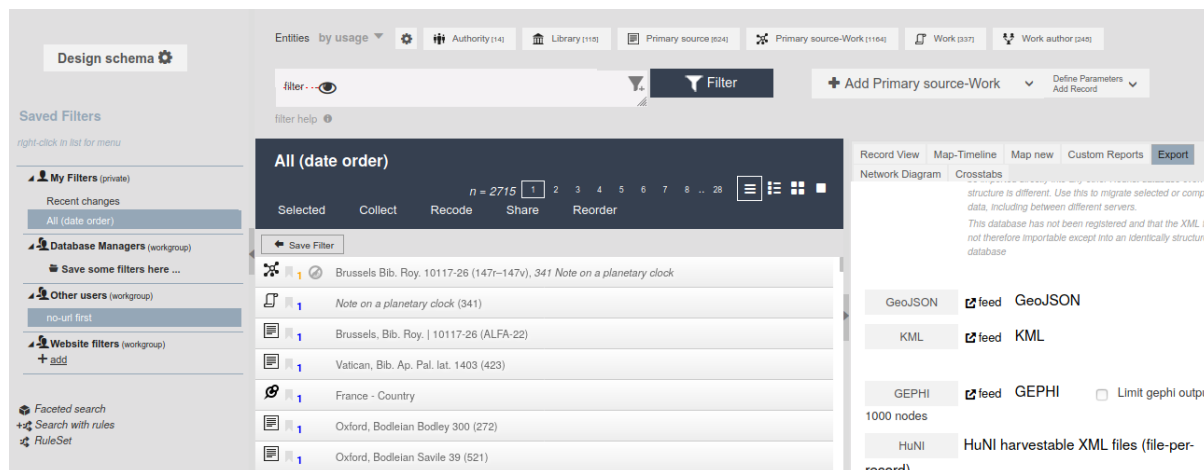
Search with rules

Searches with addition of a rule set automatically expand the initial search to a larger set of records by following a set of rules specifying which pointers and relationships to follow (including relationship type and target record types)

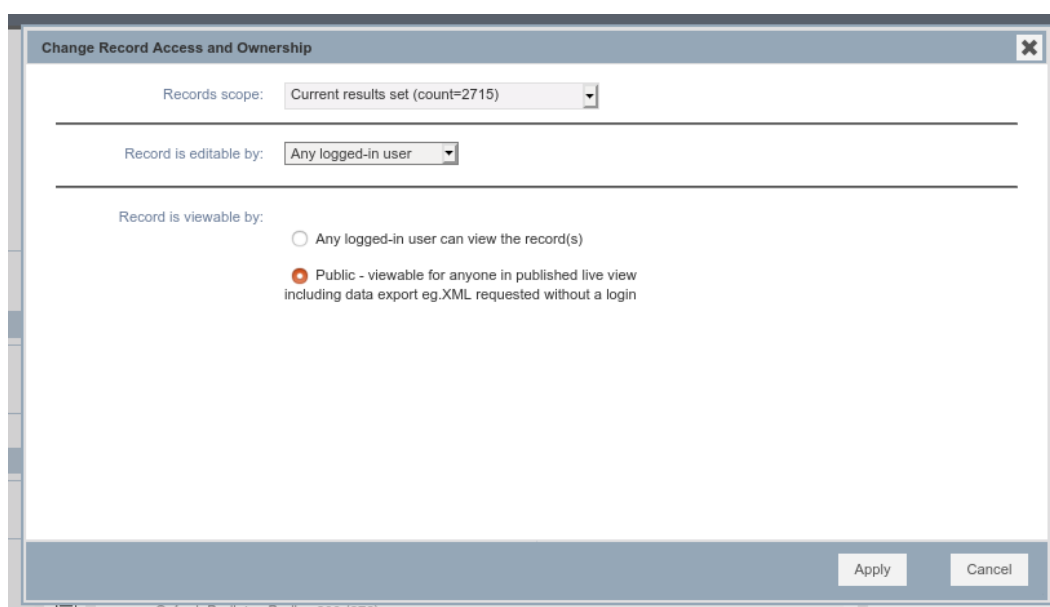
Exposing data

Making it public

Unless public, none of your records will be accessible to non logged-in users on the web. In order to retrieve and use Heurist data outside of its back office or CMS, you need to make it public.



1. Select in the central table the records you wish to make public
To select all database, click on "All (date order)" on the left menu
2. Click on the "Share" tab above the central table, then on "Ownership / visibility"
3. In the modal that appear, for **Records scope**, select "Current results set"
For **Record is viewable by**, check "Public"



JSON feed

Any result set can be accessed dynamically in a raw format with the Export as feed option.

1. Select the records set you wish to export
2. Click on the "Export" tab in the right panel
3. Click on the "Feed" button beside the format you want for the data
4. Choose an option relative to whether or not to display records linked by record pointers