CAB Direct Help v1.0

User Guide

by CABI

CAB Direct User Guide

version 1.0

by CABI

Welcome to the CAB Direct user guide. This guide contains similar content to the online help, which is available on the CAB Direct interface from the help icons.

Getting Started

1 Getting Started

Welcome to the CAB Direct help. CAB Direct provides a single point of access for all your CABI database products.

The online help is context-sensitive, so if you want help on a particular CAB Direct page, click the relevant help icon ❓ to display information about that page.

About CAB Direct

CAB Direct is CABI's online database platform, providing a single point of access to all of your CABI database subscriptions.

CABI has worked with development partners from across academia and industry to develop the next generation of the CAB Direct platform. Designed around the way researchers work, CAB Direct has completely new features to help you get more out of the literature, a more intuitive user experience, and has a new look and feel.

CAB Direct is the only online platform built specifically to help you get the most out of CABI's world class databases, CAB Abstracts and Global Health.

Through CAB Direct's innovative platform you and your users have access to:

- over 11 million bibliographic records

- over 340,000 full text articles hosted by CABI

- many other authoritative reviews, news articles and reports

If you have any questions or feedback the CAB Direct platform please contact support@cabi.org

1.1 Signing in and out

Signing in to CAB Direct

Sign in to CAB Direct either via your institution, (using institution name or your IP address), or with an individual CAB Direct account.

Signing out of CAB Direct

It is recommended you close your CAB Direct session when you have finished, either by:

- closing the browser tabs you have been using for CAB Direct, or

- signing out of CAB Direct.

After periods of inactivity you are signed out automatically by CAB Direct.

Note. Signing out of CAB Direct will:

- remove your recent searches,

- remove selected records that are not saved in My CABI 58,

- sign you out of your CAB Direct session so others can sign in.

1.2 Searching Overview

There are four ways to find information on CAB Direct : **Keyword** and **Advanced** searching, **Browse** all content and **CAB Thesaurus**.
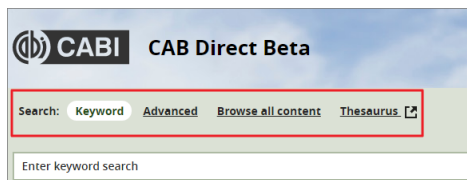
Keyword (or simple) searching is similar to using an internet search engine, where you type search terms then press **Search**. The Keyword search explores <u>all</u> indexed fields in the CAB Direct database. Search filters (or *facets*) help you narrow your search results.

Advanced searching, on the other hand, enables you to easily narrow your search to the index fields most relevant to your search. You can filter your search by database field, (e.g. article title, author name, publisher etc.), date, document type, CABI product etc.

Browse all content enables you to browse the CAB Direct records by subject (using CABI codes), author name or journal title.

Use the CAB **Thesaurus** to search CABI's controlled vocabulary of terms covering pure and life sciences, technology and social sciences.

Search mode	Benefit
Keyword ⌐10⌐	Simple, quick. Retrieves the maximum number of records. Use search filters (or *facets*) to narrow your search.
Advanced ⌐16⌐	Choose particular index fields to make your search more relevant. You can also use search filters (or *facets*) to narrow your search.
Browse all content ⌐23⌐	Browse by topic, author or journal.
CAB Thesaurus ⌐27⌐	Build a search query using terms from the CAB thesaurus

Keyword Searching

2   Keyword Searching

The **Keyword** search enables you to carry out a search by typing a single word, a phrase or a complex query.
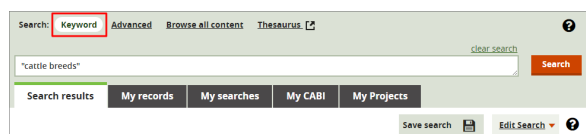
A CABI database record, e.g. an article or paper, contains individual data fields such as the title, the abstract, the publisher, etc. When you type a word or phrase in the **Keyword** search box, then press the **Search** button, CAB Direct searches the whole record, i.e. the record's title, all indexing fields (including the author), the abstract and the record's bibliographic details. This is known as a 'free-text' search.

Single Word Searching

A single term is a single word such as `cattle`. Multiple words entered into the search box are treated as single terms and combined with an invisible `AND`.

For example, `cattle breeds` is treated as `cattle AND breeds`.

Phrase Searching

A search phrase **must** be surrounded by double quotes as in the example `"cattle breeds"`.

Example:
You can enter a search string that contains multiple terms, i.e. single words and phrases, as in the example `"cattle breeds" "milk production" europe`. These three terms are, by default, combined with an invisible `AND`, as in, `"cattle breeds" AND "milk production" AND europe`

For greater control of your search, you can combine multiple terms with the three Boolean operators (`AND`, `OR`, `NOT`) to form a more complex query. Make sure each phrase in your Boolean query is identified correctly. For more information, see Boolean Operators 12.

2.1   Word Stemming

By default, CAB Direct uses *word-stemming* to find additional terms with a common beginning, or stem.

Searching for `House`, for example, also finds `Housing` and `Houses` and `Housed`.

Conversely, searching for `Housing` also finds `House` and `Houses` and `Housed`.

Truncating search terms
If you want to search for several words that have the same stem, using *truncation* can save time. For unlimited truncation, use the asterisk (*), as in this example:

Example:
Typing `Nutri*` retrieves words starting with `NUTRI` such as `NUTRIA`, `NUTRIENT`, `NUTRIENTS`, `NUTRITION`, etc.

Tip. Truncation and word-stemming can sometimes find irrelevant records. To prevent stemming, for example if you want to make a very specific search, use quotation marks

around your search terms, for example "`housing`".

2.2 Search Rules

This table explains some search rules to help you enhance your searches:

Search term	Search Rule	Examples and exceptions
Punctuation	Punctuation in search terms is ignored	Exceptions: ! (exclamation mark) is treated as a searchable character, – (hyphen), terms with or without a hyphen find the same result, e.g. `malaria–resistant` finds records containing malaria-resistant and malaria resistant
Capitalisation	Search terms are case insensitive	CABI, Cabi and cabi are treated the same
Accented characters	Letters with accents and foreign characters are ignored	ñ is treated as n
Asterisk wildcard *	Represents <u>any group</u> of characters	Can be used before, after or in the middle of a search term, e.g. `*type` finds genotype, subtype, karyotype etc. `col*r` finds colour and color
Question mark wildcard ?	Represents <u>any single</u> character	`wom?n` matches woman and women
Wildcards * and ?	* and ? may be combined	`organi?ation*` matches organisation, organisations, organisational, organization, organizations, organizational
Boolean operators AND, OR, NOT	Can be used to refine your search	For more information, see [Boolean Operators](#) 12
Parentheses and quotation marks	Use either quotation marks or parentheses around phrases, if you are combining more than one phrase with Boolean operators	`(Antibiotic OR Antiviral) AND (Alga* OR Seaweed)` For more information, see [Boolean Operators](#) 12
Single term using index field names (or *tags*)	Enter the names or tag followed by a colon (:)	Example, using the corporate author tag, `ca:` To search for all records authored by WHO,

Search term	Search Rule	Examples and exceptions
		enter `ca:"World Health Organization"` Click here 71 for a list of field codes.

Multiple terms (i.e. a phrase) using index field names (or *tags*)	The index field is only valid for the term that it directly precedes. To group several terms together with a single field, use either:
	• quotes, if searching for a phrase, or
	• parentheses (brackets) if searching for separate words
		`pb:blackwell publishing`
		Matches 'blackwell' in the publisher field, and 'publishing' in the Free-Text index.
		
		`pb:"blackwell publishing"`
		Matches the phrase 'Blackwell Publishing' in the publisher field.
		
		Click here 71 for a full list of field names and tags.

2.3 Preferred terms

CAB Direct replaces certain search terms with its own *preferred* indexing terms. For example, if you type `"mad cow disease"` CAB Direct searches for *bovine spongiform encephalopathy* which is the preferred indexing term.

Note. To see if your search terms has a preferred term, please refer to the CABI Thesaurus which contains CABI's controlled vocabulary of terms in pure and applied life sciences, technology and social sciences. For more details on the CABI controlled vocabulary, see CABI Controlled Vocabulary 21

2.4 Boolean Operators

To make searching more accurate you can use Boolean operators (AND, OR, NOT) to link your search terms.

AND
By default, phrases and single words are searched in combination and are linked with the Boolean operator `AND`

Example:
The search phrase `"cattle housing"` europe `"animal welfare"` retrieves records whose indexing contains all three search terms together.

Note. You can type `AND` in either upper or lower case as shown here:

`"cattle housing"` and europe AND `"animal welfare"`

OR
Use this Boolean operator to modify or refine your search.

Example:
You want to find research papers about cattle or sheep or horses. If you type the three terms: `cattle sheep horses`, CAB Direct retrieves only records that contain all three terms. In other words, they would be `AND`ed together.

This search would not find records that contain just one or two of the terms. This would seriously limit the search. In this example, you want to find records that contain all the words or any of the words. To do this, you can use the `OR` operator, i.e.

`cattle OR sheep OR horses`

This search finds records that contain one or more of the three search terms. The `OR` operator "expands" the search. The search gets larger as you `OR` more terms together.

NOT
Use this Boolean operator to exclude terms from your search.

Example:
You are interested in research papers about breeding but not genetics. To do this, use the `NOT` operator:

`breeding NOT genetics`

This search finds all records containing the word *breeding*, but excludes any record that includes the word *genetics*. The `NOT` operator restricts your search, making it smaller.

Tip. Use the `NOT` operator carefully, as it is possible to lose relevant records by accident.

2.5   Using Multiple Operators

To further narrow a search, you can combine two or more of Boolean operators together, in a single, complex search statement.

Example
You are interested in research papers about the breeding of sheep or cattle or horses but <u>not</u> in papers about genetics. In this search, use `AND`, `OR` and `NOT`, as shown below:

`cattle OR sheep OR horses AND breeding NOT genetics`

Then you must describe the order in which to carry out the search:

Firstly, find `cattle OR sheep OR horses`,

Secondly, combine this group (or set) of records with the word `breeding`,

Lastly, remove the records containing the word `genetics`.

To do this in more detail:
Step 1. Specify the order of the search, use parentheses (i.e. round brackets) to enclose the three separate operations. We want the `OR` operation done first, so enclose the `OR`ed terms in brackets:

```
(cattle OR sheep OR horses) AND breeding NOT genetics
```

Step 2. Add the `AND` operation, by enclosing this in a second set of brackets:

```
((cattle OR sheep OR horses) AND breeding) NOT genetics
```

Because the `NOT` operation is outside both sets of brackets, this is performed last.

Step 3. Click **Search**.

Advanced searching

3   Advanced searching

The **Advanced** search screen enables you to run complex search queries in multiple search boxes which you can link together with Boolean operators (AND, OR, NOT).

Limit your search

Once you have entered a search term in one of the search boxes, you can refine your search by applying filters as follows:

Screen field:	Limit your search to...
All fields	index fields that are relevant to your search, e.g. Article title. For more information see Field searching 17
Published between	a range of publication dates of the original papers
Added since	those records added since your previous search, for example
Document type	specific documents types, such as books and conference proceedings
Only search for	• **CABI Hosted Full Text**. Publications which are hosted but <u>not</u> published by CABI, e.g conference proceedings, smaller publishers' journals etc. These are typically referred to as 'grey' literature. • **Evidence Based Research**. Designed to retrieve systematic review and meta-analyses by searching for elements in a publication's title and abstract. • **Open Access Journals**. Retrieves only articles published in 'gold open access' journals, which are free to download and use. Currently CAB Direct only retrieves data published from 2015 onwards.
Search in	one or more CABI products

Tip. Use the **And** drop-down to use Boolean operators to link and refine your search terms. For more information see Boolean Operators 12.

To carry our your search, click the **Search** button to display the results in the **Search** tab. For information, see Search Results tab 29

3.1   Field searching

Use the index field drop-down list to refine your advanced search by selecting the appropriate index field for your search:

Advanced index field	Explanation	Searching tips
Article title	Includes: ▪ English Item Title ▪ Non-English Item Title	Use Article Title, for example, to search for a paper when you know all or part of the title, and you only need additional bibliographic data. more [18]
Abstract	Abstract	
Author name	Includes: ▪ Personal Author ▪ Author Variant ▪ Editor ▪ Additional Author ▪ Corporate Author	*Personal authors* - link name and initial with hyphens, e.g. `smith-j-a` *Corporate authors* - use double quotes, or hyphens, e.g. `"world health organisation"`, or `world-health-organisation` more [19]
Author Affiliation	Represents the principal author's institution, e.g. University of Kaposvár	
Descriptor	Terms included in CAB Thesaurus, e.g. disease prevention, epidemiology. more [20]	
Organism descriptor	Terms included in CAB Thesaurus, e.g. scientific names such as plant and animal names, part of the organism's taxonomy. more [20]	
Geographic location	Location of the research, not necessarily where it is published. Terms included in CAB Thesaurus. more [20]	
Broad term	Terms which exist above a search term in the taxonomic or geographic hierarchy in the CAB	

Advanced index field	Explanation	Searching tips
	Thesaurus, e.g. primate, viruses. more 20	
Identifier	Terms or organisms that are not in CABI's controlled vocabulary, e.g. papers containing new concepts.	
Subject term	Searches a combination of Descriptor, Organism descriptor, Geographic Location, Broad term and Identifier fields	Quick way to search the main index fields where you want a high degree of relevance on a topic. more 19
Publication source	Publication source	Search for 'highest level' publications, e.g. journals, books, conference proceedings (i.e. not chapters or articles)
Publisher	Includes: • Publisher name • Location of publisher • Country of publication	
CABICODE	CABICODE Cabi codes are CABI's own classification codes for broad subjects. Each database record is assigned with at least one CABI code.	You can also use CABI codes to browse the CAB Direct database, see Browse All Content 23
Conference	Includes: ▪ Conference dates ▪ Conference title	
Language	Includes: ▪ Language(s) of Summary ▪ Language(s) of Text	
Year	Year of publication	
Record number	Unique CABI internal number for a record.	Enter the CABI record number, e.g. 20020293241
DOI	Digital Object Identifier - Unique number provided by publishers	
ISSN	International Standard Serial Number	
ISBN	International Standard Book Number	

For a full list of field index tags, see Field Tag list 71.

3.1.1 Article title

All CAB ABSTRACTS records have an English Item Title (i.e. Article title) which is the English version of the title of the article that has been abstracted. As most original articles are written in English, the **Article title** is usually the title of the original article.

Non-English language abstracts
If the original article is written in a non-English language, the Article title field contains an English translation of the original title. For example, you may see a French article with an original title in French and an English translation of this title in the Article Title field. Although the English Title and the Original Item Titles are entered as two separate input fields, they are merged into one field, the Article Title field, for searching purposes.

3.1.2 Author name

There are two types of Author:

- Individuals, often referred to as **Personal Authors**, and

- Organisations, like the World Health Organization, referred to as **Corporate Authors**.

Personal Authors

When CABI creates a record for a paper written by a personal author or authors, the policy is to include the names of all authors. Author's names are copied exactly from the original publication. When adding authors' names to a record, they are added as family name, first initial, second initial, e.g. `smith, t. a.`

Author Variants
Many authors' names fit this format, but many do not. For names that do not fit this standard pattern, CABI often includes variations of an author's name in another field called Author Variants, which is also included in the **Author name** field.

Editors names
If a book, conference proceeding or journal issue has an Editor, the Editor's name(s) is also added to the record. All personal authors' and editors' names are added to the Author Index, so you can search in one place, i.e. **Author name**.

Corporate Authors

When you search for corporate authors use double quotes or hyphens between the words to get an exact phrase match. You can also use round brackets which gives a slightly broader search, as it searches not for the exact phrase but simply for the occurrence of the individual words somewhere in the corporate author field, and in any order, e.g. `ca:(world health organization)`

Tip. As it is not possible to apply strict rules for adding corporate authors to a record, it is best to search for several variations, i.e. double quotes, hyphens, round brackets.

3.1.3 Subject term

The subject term index field searches five important index fields at the same time, i.e. Descriptor, Geographic Location, Organism Descriptor, Identifier and Broad terms fields.

Therefore when you select **Subject term** in the **Advanced** search drop-down list, you restrict the search to just the important papers and <u>not</u> simply all papers that mention your search terms in the abstract or the title.
The effect of using the Subject term field is to reduce the total number of records found but to increase the importance of the records you do find.

Example:

Tip. The **Subject term** index field includes the **Broad terms** field. This is useful in searching for geographic terms. For example if you search for `developing countries`, this searches not just the broad term but also a list of related narrower terms, in this case, all individual developing countries.

3.1.4   Other important fields

Broad term field
As the CAB Thesaurus is a hierarchy, entries have 'broader terms' above them and 'narrower terms' below them. For example, the CABI Thesaurus entry for *Coleoptera*:

Broader terms, from the CAB Thesaurus are added automatically to the Broad Term field in CAB Direct database. This is only done for animal names, plant organism names and geographic terms, i.e. all the terms that appear in the Organism Descriptor field and the Geographic Location field.

Taking the example of *Coleoptera*, every time you search for a beetle species name in the **Organism Descriptor** field, the broader term *Coleoptera* is automatically added to the **Broad term** field.

Identifier field
This field is used for non-controlled index terms; terms that do <u>not</u> appear in the CAB Thesaurus. This field is important for papers that discus new concepts that, currently, do not have their own Thesaurus term. This would include new chemicals, new species, etc.

The record has to be indexed with an appropriate term but, because it is not in the Thesaurus, this term can not be added to the Descriptor, Organism Descriptor or Geographic Location fields. It would be rejected. Instead, it is added to the Identifier field, where it can be searched using the Identifier field tag (`id`).

3.2   CABI Controlled Vocabulary

All the terms appearing in the following database fields are controlled by the CAB Thesaurus, CABI's controlled vocabulary of terms:

- Organism Descriptor,

- Geographic Location,

- Descriptor, and

- Broad Term fields.

The advantage of having a controlled vocabulary is that you only need to use one term to search for a concept rather than using many terms.

The *Organism Descriptor* field is used for animal and plant and micro-organism names, the *Geographic Location* field is used for country and other geographic names and the *Descriptor* field is used for all the "other" terms that are neither organism names nor geographic. The entries in these three fields are added to the records manually, by the CABI Indexers.

Common v. scientific names

Because CAB ABSTRACTS is a scientific database, it is important to remember that most animal and plant concepts are indexed with their scientific names. All animals, except for commonly managed livestock like cattle, sheep, goats, etc. are indexed with their scientific names.

For example, if you want to search for papers about beetles, you would need to search for the scientific index term, *Coleoptera*, rather than beetles. However, plants are indexed with both their scientific and their common names, so the searching of plants is easier.

In general, index terms are added specifically to a concept within a paper. If a paper is a general paper about beetles, for example, it is indexed with the Organism Descriptor term *Coleoptera*. But, if the paper is about a specific beetle species, it is indexed with the species name, and not the word *Coleoptera*. In this case *Coleoptera* will appear in the Broad Term field.

# Browse all content

4   Browse all content

The **Browse all content** link enables you to browse the CABI database in three different ways:

- by <u>Subject</u> 23, use CABICODES to browse broad areas of interest to which you have access,

- by <u>Author</u> 24, browse/search alphabetically to select author names,

- by <u>Journal</u> 25, browse by publication title.

4.1   by Subject using CABICODES

All database records that you have access to are displayed alphabetically in a hierarchy of subjects (based on CABICODES). You can select a subject heading to automatically run a **Keyword** search. Select either:

- Subjects (CABICODES with 000 suffix), e.g. **Food Science and Food Products (Human) - (QQ000)**, or
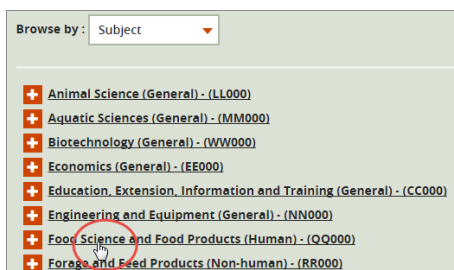
- Subtopics by expanding the headings (click the + button to expand the topics).
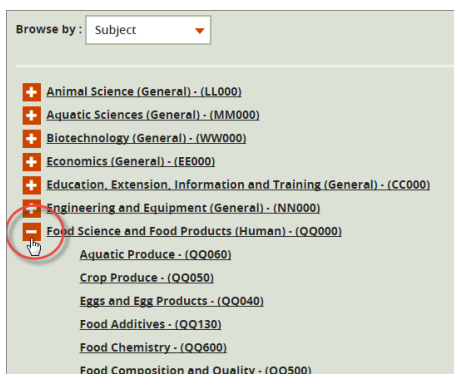
4.1.1   About CABICODES

In addition to adding index terms to a record, broad concepts or subjects are also "indexed" with a classification system known as CABICODES.

CABICODES are a hierarchical list of classification codes that divide the subject coverage of the CAB ABSTRACTS database into 23 major sections or subjects. Each subject then includes a series of codes that divides that subject into more specific subjects. The codes themselves are typically used to code for subjects that would be difficult to describe with keywords alone. The area of *Forestry*, for example, has its own set of codes, as shown here:

CABICODE Name
KK000   Forestry, Forest Products and Agroforestry (General)
KK600   Agroforestry and Multipurpose Trees; Community, Farm and Social Forestry

KK530	Chemical and Biological Processing of Wood
KK130	Forest Fires
KK120	Forest Mensuration and Management (Discontinued March 2000)
KK500	Forest Products and Industries (General)
KK100	Forests and Forest Trees (Biology and Ecology)
KK515	Logging and Wood Processing
KK540	Non-wood Forest Products
KK160	Ornamental and Amenity Trees
KK150	Other Land Use (Discontinued March 2000)
KK140	Protection Forestry (Discontinued March 2000)
KK110	Silviculture and Forest Management
KK510	Wood Properties, Damage and Preservation
KK520	Wood Utilization and Engineered Wood Products

4.2   by Author

You can browse for publications by author.

1. From the **Browse by**: drop-down, select **Author**,

2. Type at least 2 letters of the author's surname, then press the **Search** button to display the results of authors matching your search showing the number of records found in brackets.

    If you know the author's surname and initial, enter: *surname<comma><space> initial*, e.g.
    `Rothwell, J`

    Note. The use of wildcards, i.e `*` and `?` are not supported in the search box.

3. Click an author's name from the results to display their records on the **Search results** tab.

For more information how the author field is indexed, see Author name 19

4.3 by Journal

You can search for publications using the journal title.

1. From the **Browse by**: drop-down, select **Journal**,

2. Select the journal either by typing 2 or more letters of the journal name or by selecting a letter from the alphabetic list.

3. Press the **Search** button to display the title and ISSN of the journals matching your search.

4. Click the required journal's name from the results to display their abstracts on the **Search results** tab.

Searching using CAB Thesaurus

5   Searching using CAB Thesaurus

CAB Thesaurus is CABI's controlled vocabulary covering pure and applied life sciences, technology and social sciences. By browsing the CAB Thesaurus you can select terms to add to your CAB Direct search.

The CAB Thesaurus is displayed via a link from the main search page:


Adding search terms from the CAB Thesaurus

1. Click the **Thesaurus** link on the main search page to open the CAB Thesaurus.

2. Using the **Search Thesaurus** box, search and browse for the term you want.

    Note. To find more information about using the CAB Thesaurus, click the **Help with search >>** link to open the CAB Thesaurus online help.

3. Click the **search** button (or the orange search arrow) to display the **Search results** page:
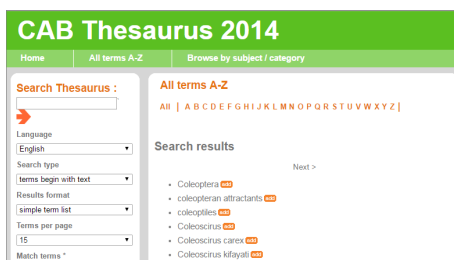
4. Browse the results to find the thesaurus term you want to add to your CAB Direct search.

5. To add a term from the Thesaurus, click the **Add** button next to the term. The term you selected is added to the **Search string** box on the right-hand side of the CAB Thesaurus page:

6. When you have finished adding terms to the Search string box, click **Send to CAB Direct** button to insert the terms into the CAB Direct **Keyword** search box:

7. Continue with your CAB Direct search. For more information see Keyword Searching 10

Search results tab

6 Search results tab

The **Search results** tab displays the results of your searches (**Keyword** or **Advanced**) and browsing (**Browse all Content**). Each search result shows a shortened version of the main record and includes the record title, the first few lines of the abstract and the main bibliographic details.

To view the full abstract record, click the results title:

Note. In the **Results** tab, your search terms are, by default, highlighted in yellow.

For more information about narrowing your displayed search results, see Refining search results 29 .

6.1 Refining search results

If your **Keyword** or **Advanced** search retrieves an unmanageable number of results, you can narrow the list to the most relevant records by using these two key search tools:

- **Results by Year**. This shows a chart of the number of abstracts published from the earliest year of publication to the most current. Use the slider controls to define a range of years.
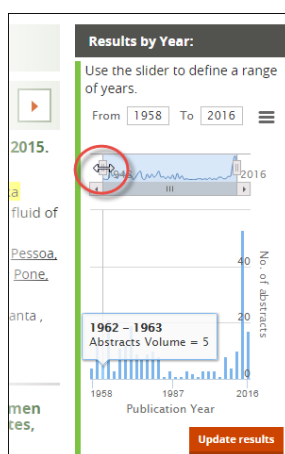
For more information, see Refining by Year 30 .

- **Facets**. Facets are index terms applied by CABI indexers to each abstract according to important headings, such as topics, organism descriptors, author, year of publication, etc.

Use facets to see which indexed terms occur most frequently in a record to get more specific search results.
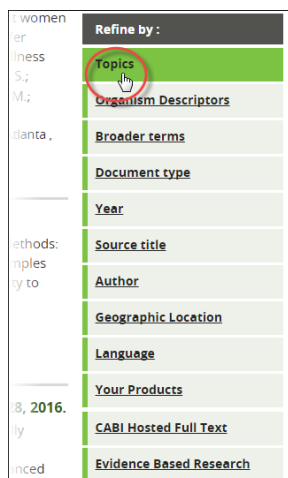
For more information, see Refining by Facets 32

6.1.1 Refining by year

Using the **Results by Year:** panel on the right-side of the search results page you can do the following:

Refine results by year range 30

Refine results by specific year 31

Print a Year Chart 31
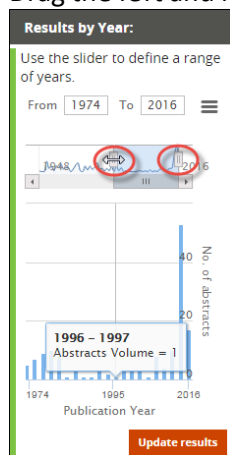
Download a Year Chart image 31

Refining by year range

To refine your search results by a range of publication dates, use the **Results by Year** slider on the right-side of the search results page:

1. Drag the left and right sliders to select the desired year range:

2. Click the **Update results** button to refine the search results based on your new date range. The chart is re-drawn to show the start and end years of your selected range.

Refining by specific year

To refine your search results by a particular year of publication, use the **Results by Year** slider on the right-side of the search results page:

1. In the **Results by year** chart, click the bar corresponding to the publication year you want. In the following example, the results from 2014 to 2015 have been selected:
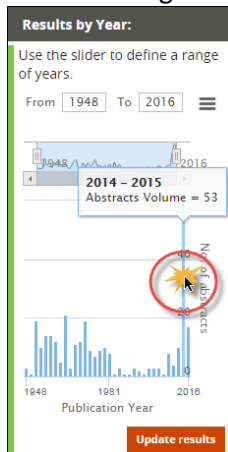
Note. The search results are update automatically and the date range is added to the search box, e.g.

`((zika virus) AND yr:[2014 TO 2015]`

Printing Year Chart

To print the **Results by year** chart:

1. Select the chart context menu,
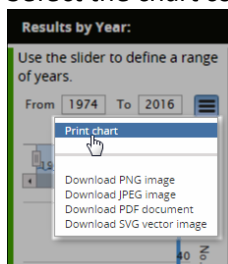
2. Click **Print chart** to display the Windows **Print window.**

3. If required configure the print options, then click the **Print** button.

Downloading Year Chart image

To download the **Results by year** chart, select the chart context menu, then click the image download format you want, i.e. PNG, JPEG, PDF or SVG vector.

6.2 Refining by facets
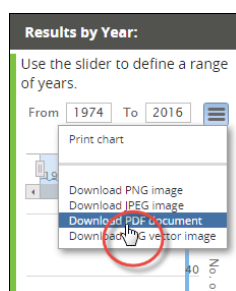
To refine your search results by facets (i.e. important subject headings), select the required facet from the **Refine by:** list on the right-side of the search results page.

Facet windows help to visualise important terms as boxes on a chart called a 'tree map'. The size of a term's box relates to the number of times the term occurs in the search results' abstracts, as in this example from the **Topics** facet:
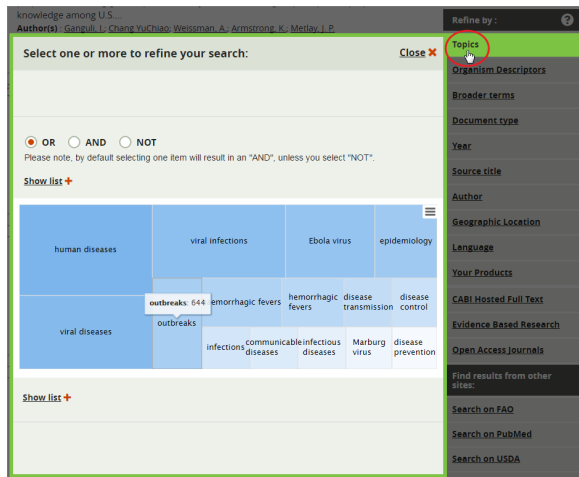
Tip. To see <u>all</u> terms and their frequency as a selectable list, click the **Show more +** button.

To refine your search by facet:

1. Select the facet you want to refine you search on, e.g. **Topics**, to display the facet.

2. Select one or more terms from the facet window.

3. The default Boolean operator is OR which you can change if required.

   Note. To refine by combining multiple facets, see <u>Combining multiple facets</u> 32.

4. When you have finished, click the **Refine results** button to update the search results page. Your facet terms are listed in the **Refined by:** field at the top of the **Search results** tab.

Tip. To see your search terms (in syntax format) including your initial search (Keyword or advanced) and subsequent refinements, click **Edit Search**. For more information, see <u>Using Edit Search</u> 36.

6.2.1 Combining multiple facets

You can combine facets to further refine your search. For example, you can select terms from **Topics**, **Organism Descriptors** and **Author** facets to give your search further focus.

To combine facets:

1. Select from each facet window in turn using the above procedure in <u>Refining by Facets</u> 32. However, do <u>not</u> click the refine results button yet.

2. Exit each facet window by clicking the **Close** button. The combined facets are displayed on each facet window. In this example terms from three facets have been combined, i.e. Topics, Year and Geographic Location:
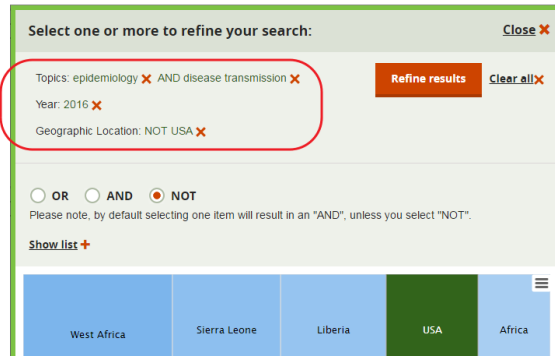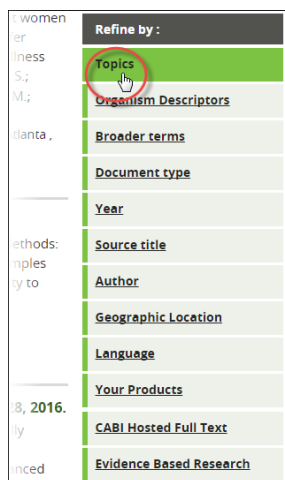
3. When you have finished combining facets, in the final facet window, click the **Refine results** button to display your search results.

Note. The default Boolean operator within a facet is OR, which you can change to AND or NOT, as required. However when you combine multiple facets, you can still choose any Boolean operator <u>within</u> each facet but the Boolean operator <u>between</u> facets is AND, which you can't change.

6.2.2 List of facets

Here is an explanation of the facets using in CAB Direct to refine your search results.

| Facet	Explanation
Topics	Includes the Descriptor and Identifier record fields.
Organism Descriptors	Plant and animal scientific names from the CAB Thesaurus.
Broader terms	Terms which exist above your search term in the CAB Thesaurus taxonomic and geographic hierarchy, e.g. a search for Coleoptera shows Insects as a Broader term. For more details, see Other important fields [20].
Document type	Category of publication, for example, journal, conference proceeding etc.
Year	Year of publication.
Source title	Title of publication.
Author	Includes Personal Authors, Author Variants, Editors, Additional

Authors and Corporate Authors.

Geographic Location	Location of the research, not where it is published. Terms included in CAB Thesaurus.
Language	Language(s) of Summary and Language(s) of Text.
Your Products	The CABI products that your institution has subscribed to, e.g. Global Health.
CABI Hosted Full Text	Publications which are hosted but <u>not</u> published by CABI, e.g conference proceedings, smaller publishers' journals etc. These are typically referred to as 'grey' literature.
Evidence Based Research	Designed to retrieve systematic review and meta-analyses by searching for elements in a publication's title and abstract.
Open Access Journals	Retrieves articles published in 'gold open access' journals, which are free to download and use. Currently CAB Direct only retrieves data published from 2015 onwards.

6.2.3   Printing and downloading tree maps

Facet windows help to visualise important terms as boxes on a chart called a 'tree map'.

To print a facet treemap chart:

1. Open the **Refine by:** facet window you want to print, e.g. **Topics**

2. Select the **Chart context menu**,
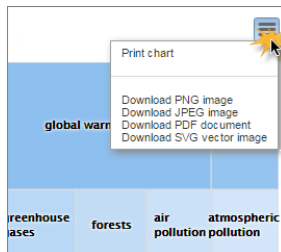
3. Click **Print chart** to display the Windows **Print** window,

4. If required configure the print options, then click the **Print** button.

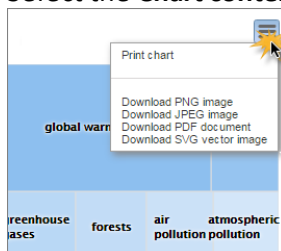**To download a Facet treemap chart as an image or PDF, for example to include in a presentation:**
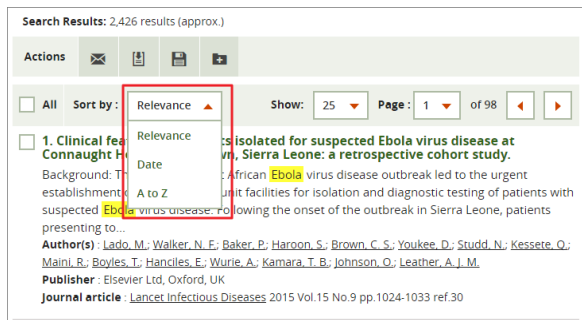
1. Open the **Refine by:** facet window you want to download, e.g. **Topics**,

2. Select the **Chart context menu**,

3. Click the required **Download to...** option, to download the image to your default download folder.

6.3   Viewing results

To re-order your search results, select from the **Sort by:** drop-down list:

You can change the displayed order of search results as follows:

Sort by:	Explanation
Relevance	Importance of your search terms in the ranking algorithm.
Date	Descending order of the date the publication was added to CAB Abstract, i.e. the latest is displayed at the top.
A to Z	Alphabetical, by article title name.

To move to the next (or previous) page of results, click the ◀ left (or ▶ right) page arrow buttons:
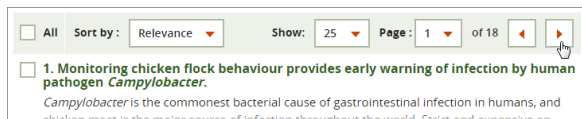
To scroll to a specific page of results, select the required page from the **Page** drop-down list:

To change the number of results listed on a page, select from the **Show** drop-down list:

Viewing Full Text

Certain publications are available for you to view online, e.g. in PDF format. Where the text of the full publication exists, a link button is shown in the search result.
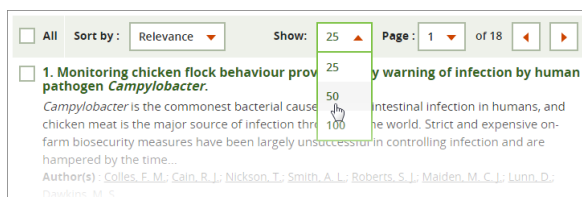
To view the full publication, click **View full text** button:

6.4   Edit Search

As well as the clickable search filters available to refine and edit your search terms, you can also directly view and edit the 'behind the scenes' query statement used by the CAB Direct search engine.

To see how your search is interpreted on the CAB Direct search engine, click the **Edit Search** button.

Note. The **Edit Search** is an advanced feature of CAB Direct and care and knowledge is required to edit a search statement successfully.

6.5   Selecting your records

When you have refined your search results to a manageable list, you can group those records you are most interested in.

To select those records you are interested in, tick the check-box on the left side of the title.


Note. CAB Direct automatically copies your selected records to the **Selected Records** tab. They are retained on the system <u>only</u> for the duration of your current CAB Direct session. To save your selected results for future use, you must first sign in to <u>My CABI</u> 58 .

Other options
Buying a publication online

Certain publications listed in the search results are available for you to buy from the CABI online bookshop, http://www.cabi.org/bookshop/.

To buy a publication, click the **Buy this Book** button to display the relevant CABI bookshop purchase page:
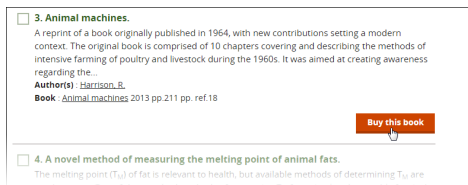
6.6   Search results actions

CAB Direct enables you to perform actions on your search results, such as print, download, etc. using toolbar buttons.
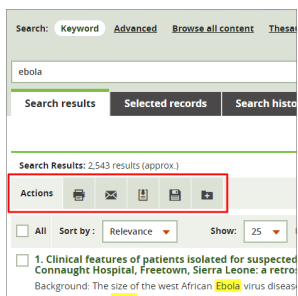
For some actions you need to be signed in to My CABI:

Search Results action	My CABI sign in required ?	More information
Print selected records	x	Print a) citation only, b) citation and abstract, or c) full record
Email record/s	x	Send an email containing records. more… 38
Download record/s	x	Download record to a file or *RefWorks*. more… 38
Save record/s	✔	Saved records show with 📑 icon. Saved to **Saved records** on **My Records** tab. You can also save records to a project. more… 39
Add to Project	✔	Add records to a Project. more… 39

Note. If you have <u>not</u> signed in to My CABI you are prompted to sign in (or register) to My CABI.

6.6.1   Printing records

You can print the following details from your selected search results:

Format options	Contains
1. Citation Only	Depends on the publication source but typically the article title,

Format options	Contains
	author(s), book title, publisher, date of publication, page number(s)
2. Citation + Abstract	As 1. (above) plus the abstract
3. Full record	As 2. (above) plus the full bibliographic details

To print your selected search results:

1. Select the records you want to print by ticking their check-boxes,

2. To view the results and open your printer window, click **Print**.

6.6.2   Emailing records

You can email the following details from your selected records:

Format options	Contains
1. Citation Only	Depends on the publication source but typically the article title, author(s), book title, publisher, date of publication, page number(s)
2. Citation and Abstract	As 1. (above) plus the abstract
3. Full Record	As 2. (above) plus the full bibliographic details.

You can select how to send the records in an email:

Email content option	Search result content is emailed...
Text of email	In the body of the email
Text file attachment	Attached as unformatted text (*attachment.txt*)
HTML attachment	Attached as a single web page (*attachment.html*) containing a hyperlink to the CAB Direct record.

6.6.3   Downloading records

You can export your records, as follows:

Export option	More information
Download to File	Select a file format from the drop-down list. When you click the **Export** button, the file is downloaded to your computer. The supported download formats are `RIS`, `BibTeX`, `CSV`, `TXT`, `HTML` **Note**. If you want to download a record that includes annotations and highlighting, you need to be signed in to My CABI and select `HTML`
Ref works	To export to RefWorks you need a RefWorks account.

You can download the following details from your records:

Download content	Contains
1. Citation only	Depends on the publication source but typically the article title, author(s), book title, publisher, date of publication, page number(s)
2. Citation and abstract	As 1. (above) plus the abstract
3. Full record	As 2. (above) plus the full bibliographic details

6.6.4 Saving records

Before you can permanently save your selected records, you must be signed in to My CABI 58.

To save your records:

1. Select the records you want to save by ticking their check-boxes. Alternatively, to save an entire page of records, select the **All** button,

2. Click the **Save** button on the **Search results** toolbar:

   - If you have <u>not</u> signed in to My CABI you are prompted to sign in (or register) to My CABI.

   - If you have signed in to My CABI, a confirmation message is displayed prompting you to also add your records to a project. To save without adding your records to a project, click the **OK** button.

3. To add your records to a project, either:

   - select the project from the drop-down list, then click the **OK** button, or

   - to create a new project click the **Create new project** button to display the Create a project window. Type the name and description of your new project, then click the **Create project** button.

Note. A saved icon is displayed in the search results page next to each saved record. Your records are also saved in the **My records** tab, under **Saved records**.

Removing your saved records

To permanently remove a saved record:

1. In **My records** tab, under **Saved records**, select the record(s) you want to remove by ticking the relevant check-box(es),

2. Click the **Remove** icon on the **Saved records** toolbar. The number of records in the **Displaying** field is reduced by the number of records you deleted.

6.6.5 Adding records to a project

Before you can add your selected records to a project, you must be signed in to My CABI. See My CABI 58 for more details.

Projects are folders where you can store and manage your records and searches, for example about a particular piece of research.

To add your records to a project:

1. Select the records you want to add by selecting their check-boxes,

2. On the **Actions** toolbar, click the **Add to project** icon:

   ▪ If you have <u>not</u> signed in to My CABI you are prompted to sign in (or register) to My CABI.

   ▪ When you have signed in to My CABI, the **Add to project** window is displayed.

3. To add your records to a project, either:

   ▪ select an existing project from the drop-down list, then click the **Add to project** button, or

   ▪ to create a new project click the **Create new project** button to display the **Create a project** window. Type the name and description of your new project, then click the **Create project** button.

4. In the **Confirm action** window, click the **OK** button.

Note. To see details of your projects, click the **My Projects** tab. For details about projects, see My Projects tab 62.

6.6.6 Saving your search

You can save your search term(s) and any refinements you have made, e.g. facet refinements, for use in the future.

To save your search:

1. In the **Search** results page, click the **Save search** button.
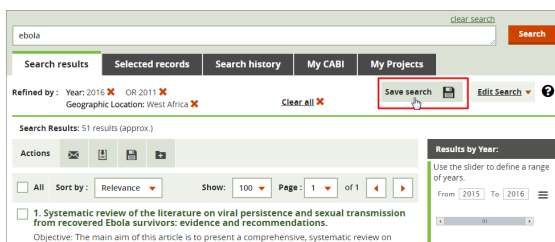
   ▪ If you have not signed in to My CABI you are prompted to sign in (or register) to My CABI.

   ▪ If you have signed in to My CABI, a confirmation message is displayed prompting you to also add your search to a project. To save without adding your search to a project, click the **OK** button.

2. To add your search to a project, either:

   ▪ select the project from the drop-down list, the click the **OK** button, or

   ▪ to create a new project, click the **Create new project** button to display the **Create a project** window. Type the name and description of your new project, then click the **Create project** button.

Your saved search is displayed in the **My Searches** tab under **Saved searches**.
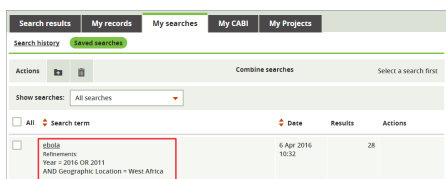
For details on using your saved searches, see <u>Saved Searches</u> 55 .

Note. You can also save searches from <u>Search History</u> 53 .

6.7   Viewing external sites

On the **Search Results** page, you can compare your search results with results from these external resource organisations:

My records tab
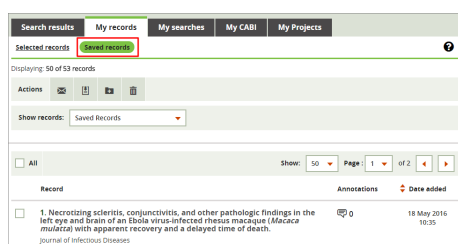
7 My records tab

This tab displays the records you have selected from the Search Results page and your saved records.

The **My records** tab displays:

- **Selected Records** 43

- **Saved Records** 44. Available if you have signed in to My CABI.

7.1 Selected records

In a CAB Direct session, the records you select from your search results (by ticking their check-boxes) are automatically added to the **Selected Records** list. In this way you can accumulate records from one or more searches to a single list which you can review and refine.
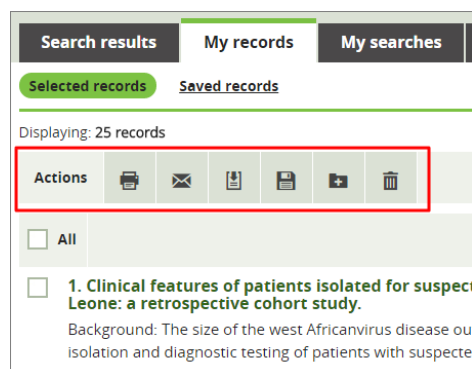
Here is what you can do to your selected records:

Selected record action	My CABI sign in required ?	More information
Print selected records	x	Print a) citation only, b) citation and abstract, or c) full record. more... 37
Email records	x	Send an email containing records. more... 38
Download records	x	Download record to a file or *RefWorks*. more... 38
Save records	✔	Saved records show with ⊟✓ icon. Saved to **Saved records** on **My Records** tab.

		You can also save records to a project. more… 39
Add to Project	✔	If you are signed in to My CABI you can add the selected records to a project. In a project you can add records and searches related to a piece of research, for instance. more… 39
Remove records	x	Permanently removes a record from your **Selected records** list. Select the record, then click the **Remove** toolbar button.

Note. If you are <u>not</u> signed in to My CABI, your selected records list is cleared when you quit the current session. You can save your selected records for future use by signing in to My CABI. See My CABI 58 for more details.

7.2 Saved records
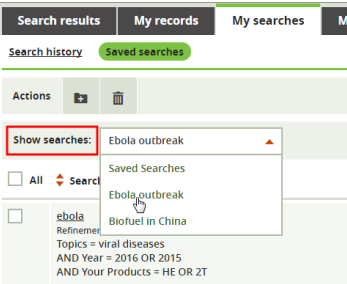
The **Saved records** list contains the your previously saved records. Using the **Show records:** drop-down list, you can view a) all your saved records, or b) filter by project.
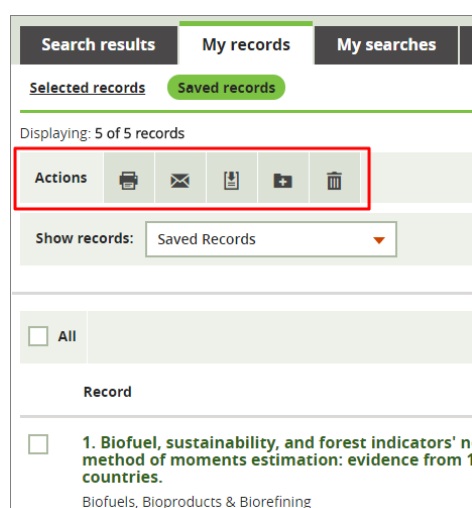
Note. The **Saved records** list is only available if you have signed in to My CABI.

Here is what you can do to your saved records:

Saved record action	More information
Print selected records	Print either a) citation only, or b) citation and abstract, or c) full record. more.. 37 .
Email records	Send an email containing your saved records. more… 38
Download records	Download your saved records to a file or *RefWorks*. more… 38
Add to Project	If you are signed in to My CABI you can add the selected records to a project. In a project you can add records and searches related to a piece of research, for instance. more… 39
Remove records	Permanently removes a record from your **Saved records**

|	list. Select the record, then click the **Remove** toolbar button. **Note**. The **Remove** action only removes a record from the **Saved records** list. To remove a search from a project, go to **My Projects** tab. [more…]⌐64⌐
Sort by project	Use the **Show Searches** drop-down list to display records you have saved to a particular project. **Note**. The **Saved Records** option in the drop-down, displays only those saved records which you have <u>not</u> added to a project.

Abstract page

8   Abstract page

The **Abstract** page displays the abstract you selected from the **Search Results** page. Included on the abstract page is the article's full abstract, citation and bibliographic details.

Having selected a record, you can:

- **view the full text** of the article. If the full text of the article is available, a link is displayed in the search results page to a PDF of the publication:
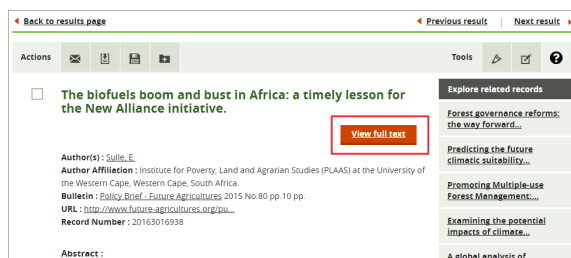
- **view similar records** based on the closeness of their meta-data. See <u>Exploring similar records</u> 48 , or

- **start a new search** using specific *Indexing terms*, i.e. keywords of records analysed and tagged by CABI's indexers. See <u>Analysing indexing terms</u> 48 .

- **run another search** by using links in a record's meta-data, e.g. author, journal article, publisher etc. For example, if you click an **Author(s):** link, it runs a search for all publications written (or co-authored) by that author:
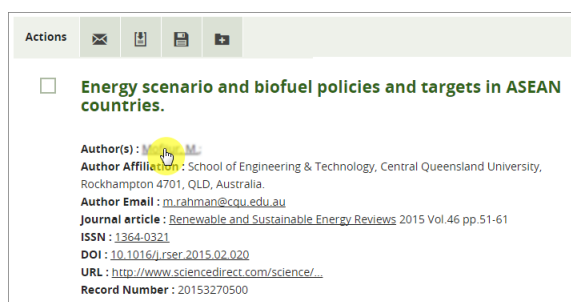
Tip. To view the full text of the <u>original</u> publication, click a record's **DOI:** (*Digital Object Identifier*) link. To view the website where the publication is hosted, click the **URL:** link.

- use the **Sources of full text** links to open the *Copyright Clearance Center* and *Google Scholar* websites. See <u>Other sources of Full Text</u> 49 .

8.1   Abstract actions

Here are the actions you can do to an abstract:

Abstract action	My CABI sign in required ?	More information
Print an abstract	x	Print a) citation only, b) citation and abstract, or c) full record. <u>more...</u> 37
Email an abstract	x	Send an email containing the abstract. Select the citation format and the email type. <u>more...</u> 38

Download an abstract	x	Download the abstract as a file (RIS, BibTeX, CSV, TXT, HTML) or an export to RefWorks. more... 38
	✔	My CABI sign in required if you want to download a record that includes annotations and highlighting. You must select HTML to download annotations and highlights.
Save abstract	✔	Saved to **Saved records** on **My Records** tab. You can also save abstracts to a project.
Add abstract to Project	✔	Save an abstract to a project. In a project you can add records and searches related to a piece of research, for instance. more... 39

Abstract Tools
You can highlight text and make annotations to the abstract. more... 50

8.2   Exploring similar records

Based on your record's meta-data profile CAB Direct lists records which are similar to the abstract you are viewing. The most similar records are listed on the right-side of the **Abstract** pages under the heading **Explore similar records**.

To see the full title of the similar abstract, hover your cursor over the record link heading.

To display all similar records, click **Show all similar records** at the bottom of the list.
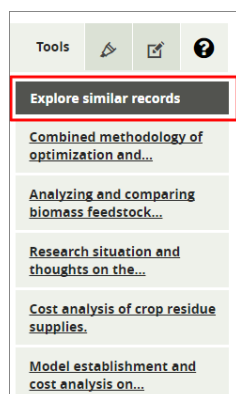
8.3   Analysing indexing terms

Based on the indexing terms of the abstract record you are viewing, you can broaden your enquiry by running a new search. Indexing terms are keywords of records analysed and tagged by CABI's indexers - the frequency of each indexing term in the record is shown in this example:
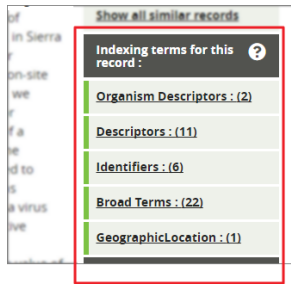
The indexing terms are Organism Descriptors (`od:`), Descriptors (`de:`), Identifiers (`id:`), Broad Terms (`up:`) and Geographic Location (`gl:`). For more information, see [Field searching](#) 17

To use indexing terms to run another search:

1. In an **Abstract** page, select a heading from the **Indexing terms for this record:** list, for example, **Descriptors**, to open a pop-up window of terms,

2. Select one or more terms for your search. To view a complete list of indexing terms, click **Show more** link,

3. If required, select a Boolean operator, **Or** (the default) or **And**

4. Click the **Search** button to run the new search.

Note. The syntax from your search is placed in the search box. Experienced CAB Direct users can edit this syntax by clicking the **Edit Search** button. For more details, see [Using Edit Search](#) 36.

Selecting multiple indexing terms
You can select indexing terms from multiple headings. For example, you could select terms from **Organism Descriptors** then close that window and open **Identifiers** to add more terms to your search. Use the **Close** button to exit each heading window. When you have selected from the final heading window, click the **Search** button.

8.4   Other sources of Full Text

From a CAB Direct abstract record, you can search certain external websites for the full text of a publication.


In the **Other sources of full text:** links in the **Abstract** page you can view the following websites:

- *CCC RightFind.* With a *RightFind* account, you can browse the *Copyright Clearance Center RightFind* website,

- *Google Scholar.* Runs a *Google Scholar* search on the title of your selected abstract.

8.5 Highlight and Annotate

You can use the abstract tools to:

- highlight passages of text, and

- add your annotations to the abstract.
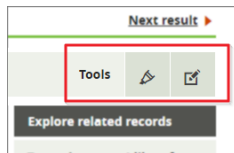
Note. If you have <u>not</u> signed in to My CABI you are prompted to sign in (or register) to My CABI.

Highlight tool

To highlight details of an abstract record:

1. In an **Abstract** page, click the **Highlight** button on the **Tools** toolbar to enable you to select a highlight colour,

2. Choose the highlight colour you want, then select the text in the abstract you want to highlight,

3. Click the **Highlight** icon to display the **Highlight** window:
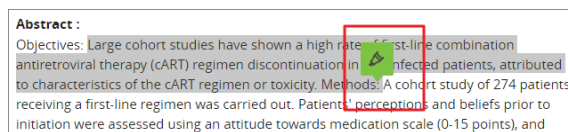
4. Click the **Save** button to add the highlighting to the abstract.

Note. To remove highlighting, hover over the text to display the pop-up remove icon. To permanently remove the highlight, click the remove icon.

Annotate tool

To create annotations on an abstract record:

1. In an **Abstract** page, click the **Annotate** button on the **Tools** toolbar,

2. On the abstract, highlight the text you want to annotate then click the pop-up **Annotate** icon:
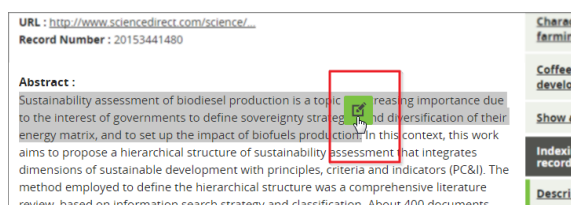
3. In the **Add Annotation** window, type an **Annotation Title** and **Annotation** text,

4. Click the **Save** button.

Note. To see the annotation, hover over the annotated passage in the abstract. The **Annotation** window is displayed where you can edit or delete the annotation.

My searches tab

9   My searches tab

My Searches tab displays your search history, i.e. searches you have made in this CAB Direct session and your saved searches.

The **My searches** tab displays:

▪ <u>Search History</u> 53. Your searches are automatically added to the **Search History** list.

▪ <u>Saved Searches</u> 55. Available if you have signed in to My CABI. For more information, see <u>My CABI</u> 58

9.1   Search history

The searches you have made (Keyword and Advanced) are automatically added to the **Search history** list. The search terms you used and any refinements are retained only for the duration of your current CAB Direct session.

Note. If you are signed in to My CABI you can save your searches for future use or add them to a project. See <u>My CABI</u> 58 for more details.

Here is what you can do to your searches:

Run a search   To run a search from your search history, click an item in the **Search term** list, for example:

The **Search tab** is displayed showing the results of your search.

Save   If you are signed in to My CABI you can save your searches for future use. Saved searches are displayed in **My searches** tab> **Saved searches**

Remove   Permanently removes a search from your **Search history** list.

Add Project   If you are signed in to My CABI you can add a selected search to a project.

Combine searches   Using Boolean operators you can combine existing searches to create a new search. See <u>Combining saved searches</u> 54

9.1.1   Saving a search

You can save your searches for future use if you have signed in to My CABI. Your saved search statements include the terms you have entered <u>and</u> any refinements you have made, such as *Year* or *Source title* facets.

To save your search statements:

1. Select the searches you want to save by ticking their check-boxes. Alternatively, to save all searches on a page, select the **All** check-box,

2. Click the **Save** button on the **Search results** toolbar:

   ▪ If you have <u>not</u> signed in to My CABI you are prompted to sign in (or register) to My CABI.

   ▪ If you have signed in to My CABI, a confirmation message is displayed prompting you to also add your searches to a project. To save without adding your searches to a project, click the **OK** button.

3. To add your searches to a project, either:

   ▪ select the project from the drop-down list, then click the **OK** button, or

   ▪ to create a new project click the **Create new project** button to display the Create a project window. Type the name and description of your new project, then click the **Create project** button.

9.1.2 Combining saved searches

Using Boolean operators you can combine search statements to create a new search statement.

To combine searches:

1. Select the searches you want to combine by ticking their check-boxes,

2. Select the appropriate Boolean operator you want to apply to the search, i.e. **And Or** or **Not**,

3. Click the appropriate **Combine** button to display your new search results.
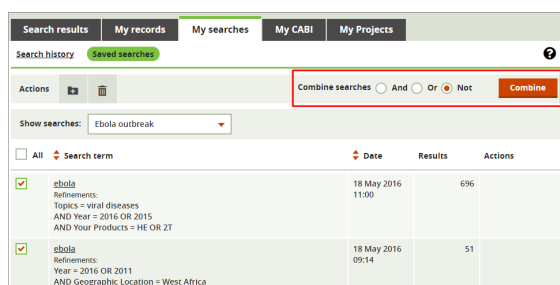
Note. If there is ambiguity or a conflict in the combined search statement, the prompt **What query would you like to run?** is displayed. Either select from the displayed list of possible searches, or to cancel the combined search click the **Go back to results** link.

9.1.3 Adding searches to a project

If you have logged in to My CABI you can add your searches to a project, for future use.

To add a search to a project:

1. Select one or more searches from the **Search history** list.

2. Click the **Add to Project** icon on the Actions toolbar to open the **Add to project** window.

3. Select an existing project or create a new project to add the search to.

4. When you have finished click the **OK** button.

9.2 Saved searches

The **Saved searches** list contains your previously-saved searches.

Note. The **Saved searches** list is only available if you have signed in to My CABI.

Here is what you can do to your saved searches:

Saved search action	More information
Remove	Permanently removes a search from your **Saved searches** list. Select the search, then click the **Remove** toolbar button. **Note**. The **Remove** action only removes a search from the **Saved searches** list. To remove a search from a project, go to **My Projects** tab. more... 65
Add to Project	You can add the selected searches to a project folder in **My Projects**. more... 56
Email alerts	Receive an email when new records are added to CAB Direct from a saved search. more... 55
Combine searches	As with the **Search history** list, you can use Boolean operators to combine existing searches to create a new search. more... 54
Sort by project	Use the **Show Searches** drop-down list to display searches you have saved to a particular project.
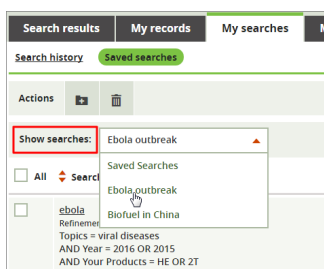
Note. The **Saved Searches** option in the drop-down, displays only those saved searches which you have not added to a project.

9.2.1 Creating an email alert

You can choose to receive an email when new records are added to CAB Direct from a saved search.

You can only create an email alert for your searches if you are signed in to My CABI. If you have not signed in you are prompted to sign in or register to My CABI 58.

To create an email alert for your saved searches:

1. In the **Saved searches** list, select the searches for which you want to create email alerts by clicking their check-boxes. Alternatively, to save receive email alerts for all your saved searches on the **Search searches** page, click the **All** check-box,

2. Click the **Email Alert** icon in the **Actions** toolbar.

Note. You will receive a weekly email alert showing up to 10 new records. To display the full list, click the link to CAB Direct in the email.

9.2.2 Adding searches to a project

You can add your searches to a project, for future use.

To add a search to a project:

1. Select one or more searches from the **Saved searches** list.

2. Click the **Add to Project** icon on the Actions toolbar to open the **Add to project** window.

3. Select an existing project or create a new project to add the search to.

4. When you have finished click the **OK** button.

My CABI

10 My CABI

Signing in to My CABI enables you to:

- save your searches,

- save your records,

- annotate and highlight your records,

- set up email alerts for saved searches, and

- create projects that contain searches and records.

To sign in to your My CABI account:

1. In **My CABI** tab > **Already Registered**, enter your registered **Username/email** and **Password**,

2. Click the **Sign In** button.

If you have <u>not</u> yet registered for a MY CABI account , click [here] 58

Note. If you have a personalisation account for any of CABI's internet products, such as *Vet Med Resource*, *Crop Protection Compendium* etc. you can use the same username and password to sign into **My CABI**.

10.1 Creating a MyCABI account

If you have a personalisation account for any of CABI's internet products, such as *Vet Med Resource*, *Crop Protection Compendium* etc, you can use the same username and password for your My CABI account.

If you do <u>not</u> have an existing account for any of CABI's Internet products and you want to benefit from registering with My CABI please follow the steps below.

To set up a **My CABI** account:

1. Select either:

    ▪ the **Register here** link on the CAB Direct Welcome page to go the My CABI page, OR

   ▪ click the **My CABI** tab on the main search page.

2. On the **My CABI** tab complete the fields to create an account:

   ▪ First and last name

   ▪ Email address

   ▪ Username (this can be your email address – just tick the **Use email as username** check-box)

   ▪ Password (must be at least 6 characters and meet at least 2 of the criteria listed)

   ▪ Confirm password

3. Click **Create account.** A confirmation email is sent to your registered email address,

To return to your previous screen, click the **Continue** link.

10.2 For My CABDirect users

Previously known as *My CABDirect*, the personalisation feature on the new platform is now called **My CABI**. All existing *My CABDirect* users will have to create a new My CABI account and manually re-populate their saved searches and saved records.

Regenerate your saved searches from My CABDirect
1. Go into **My CABDirect** on the 'old' Cab Direct platform,

2. Go to your saved searches,

3. Copy the search,

4. Go to the 'new' CAB Direct platform and paste the search into the search box. Press **Search**

5. On the **Search Results**, press '**Save Search**' to add the search to your **Saved Searches:**
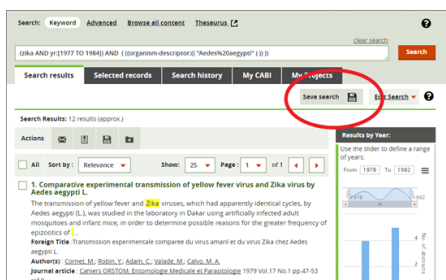
Regenerate your saved records from My CABDirect

1. Go into My CABDirect on the 'old' Cab Direct platform.

2. Go to your saved records. There are two options:

3. Either:

   i.   Copy the title of the record,

   ii. Paste this into the search box of the 'new' CABDirect platform. Press **Search**

   iii. On the search results, select the record and press the **Save** icon to add the record to your 'Saved records'.

4. Or:

   i.   Export all your saved records (either as *RIS* format, or into *Refworks*)

   ii. Copy the record ID. This is the 11 digit number in the ID field, e.g. `20161234567`

   iii. Paste this into the search box of the 'new' CABDirect platform. Press **Search**

        Note. If you have more than one record you can enter multiple ID's separated by 'OR' to give you multiple records in the search results,

   iv. On the search results, select the record/s and press the **Save** icon to add the record to your 'Saved records':
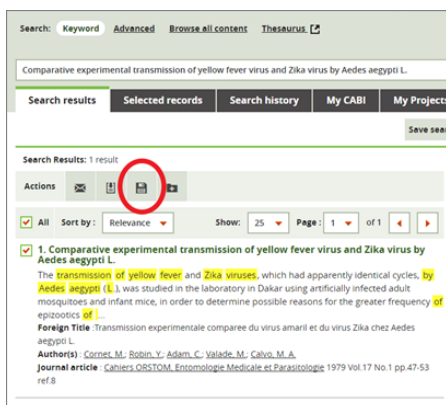
My Projects tab
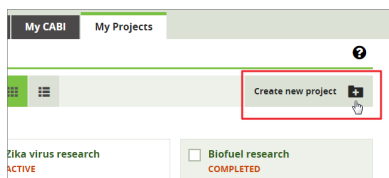
11   My Projects tab

CAB Direct enables you to organise your search activities into projects. Projects are folders where you can save your records and searches about a particular topic. Once you have logged in to My CABI 58 you can:

- Create one or more projects to organise your work,

- Save records and searches into those projects,

- View your project activity and export this activity log as a CSV file,

- Send this activity log and citation information to other project members.

On the **My Projects** tab you can:

Create new projects	1. Click **Create New project** to display the **Create a project** window. 2. Type the name and description of your new project, then click the **Create project** button.
Open a project	To open a project to view and edit its contents, click the project name to display the project's **Activity Log**: See **Managing a Project's contents:** below for details of viewing and editing a Project's contents.
Archive a project	To archive a project, select the project's check-box then click the **Archive Project** button on the **Actions** toolbar:
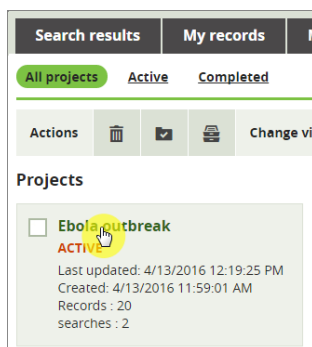
Complete a project

If you want to show that a project's purpose has been fulfilled, e.g. a systematic review, you can mark the project as 'Complete'.

To complete a project, select the project's check-box then click the **Complete Project** button on the **Actions** toolbar.
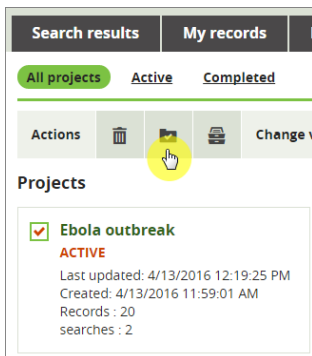
Remove a project

To permanently delete a project from CAB Direct:

1. Select the project's check-box then click the **Trash** button on the **Actions** toolbar,

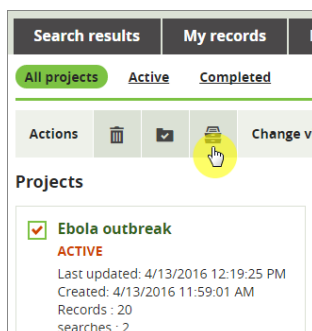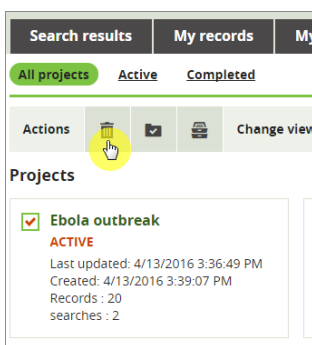2. In the **Remove projects** window, click the **Remove projects** button.

Change view

To change the default display of projects from a 'grid' to a 'list' (or vice versa), click the appropriate **Change view** toolbar button:
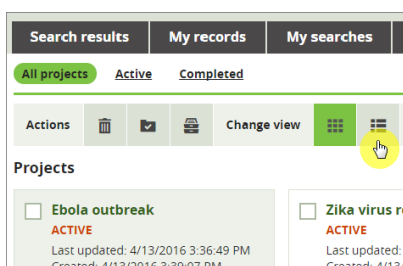
Change a project name

To re-name a project:

1. Click the project name to open the **Activity Summary** list.

2. Click the **Edit** button

3. Edit the name as required, then click **Save**.

11.1   Managing project contents

A project's contents can include your saved records and saved searches. You can manage a project's contents, as follows:

Activity Log tab | Displays a log of records and searches you have added to (or removed from) a project. more... 64

Records tab | Displays records you have added to a project with brief details - article title, journal name, author and publisher. more... 64

Searches tab | Displays searches you have added to a project with brief details - search terms and any refinements, the date you added the search and the number of search results. more... 65

11.2   Activity Log tab

The **Activity Log** displays the history of records and searches added to (or removed from) a project. It also shows text highlights and annotations you have made.

Activity Log tab:	Do this...
Add (or edit) project summary text	Click the **Edit Summary** button then type your text. Click the **Save** button.
Add an activity note	Click the **Add note** link in the **Activity Note** column. Type your note, then click the **Add note** button.
Edit an activity note	Click the **Edit note** link in the **Activity Note** column. Make your change, then click the **Edit note** button.
Change a project name	1. Click the project name to open the **Activity Summary** list. 2. Click the edit button 3. Edit the name as required, then click **Save**
Export project activity as a CSV file	Click the **Export Activity** button to download a CSV file to your computer.

11.3   Records tab

The **Project Records** tab displays details of the records in a project.

Records tab:	Do this...
Print selected records	Print either a) citation only, or b) citation and abstract, or c) full record. more.. 37 .
Email records	Send an email containing your project records. more... 38
Download records	Download your project records to a file or *RefWorks*. more... 38

Remove a records	1. Select one or more record check-box(es) then click the **Remove** icon on the **Actions** toolbar.
	2. Click the **Remove record** button to permanently delete the record from the project.
View the full record	Click the record title to open the full abstract. For more information, see Abstract page 47.

11.4   Searches tab

The **Searches** tab displays details of the searches in a project.

Searches tab:	**Do this...**
Email alerts	Receive an email when new records are added to CAB Direct from a saved search. more... 55
Add a search note	Click the **Add note** link in the **Notes** column. Type your note, then click the **Add note** button.
Edit a search note	Click the **Edit note** link in the **Notes** column. Make your change, then click the **Edit note** button.
Remove a search from a project	1. Select one or more check-box(es), then click the **Remove** icon on the **Actions** toolbar.
	2. Click the **Remove search** button to permanently delete the search from the project.
Combine searches	You can use Boolean operators to combine existing searches to create a new search. more... 54

For Librarians

12 For Librarians

We have compiled a list of key questions regarding the new CAD Direct Platform, along with answers which we hope you will find useful. During the Beta test period we will continue to enhance this list:

Frequently Asked Questions

12.1 Tailoring CAB Direct for your institutional environment

Institutional logos
It is possible to enable CAB Direct to display your institutional logo on the Home page. Please email our Support team support@cabi.org with your Logo Address e.g. http://www.library.univ.edu/logo[67].

Open URL Resolvers
CAB Direct supports use of Open URL resolvers to enable linking to institutional services and electronic subscriptions.

To enable an Open URL resolver for your institution please email our Support team support@cabi.org with the following information:

- The resolver address (e.g. http://resolver.library.univ.edu)
- The URL of your resolver icon (e.g. http://www.library/ulibraries/full_text.jpg[67])

Authorised account administrators may view the Open URL settings for their institutions via our Customer portal
http://subs.sams.cab.semcs.net You will need to know your institutional administrator credentials gain access. If you have any questions please contact our Support team support@cabi.org

12.2 Usage Statistics

Usage reports may be viewed via our Customer portal http://subs.sams.cab.semcs.net
You will need to know your institutional administrator credentials gain access. If you have any questions please contact our Support team support@cabi.org.

Further information about our COUNTER usage reports may be viewed here. http://www.cabi.org/Uploads/CABI/publishing/InformationLibrarians/COUNTER4FAQs.pdf

12.3 About MARC records

Full level, whole book MARC records are available for CABI's ebook collections. These can be accessed from the CABeBooks website http://www.cabi.org/cabebooks/marc-records/

Reference - Search codes

13   Reference - Search codes

Keyword and **Advanced** searching in CAB Direct has been designed to be straightforward, using selectable drop-down menus to build simple or more complex search strings. However for certain search fields you can use *field codes* to achieve similar results.

For example, you can use CABI product codes to retrieve all abstracts in a particular CABI product using the subject field code, `sc`**:**

To retrieve all *Global Health* articles on Ebola, for instance, type `sc:he` into the **Keyword** or **Advanced** search box:

Note. You can achieve the same result by selecting Global Health from the **Search in:** drop-down menu on the **Advanced** search page, however CAB Direct enables you to enter field codes if you prefer.

Tip. Field codes are displayed for all your searches by clicking the **Edit Search** button. For more details see Using Edit Search 36

13.1   CABI product codes sc:

You can use CABI product codes to retrieve all abstracts in a particular CABI product using the following subject codes (`sc:`). For example, type `sc:he` to retrieve all Global Health articles. Here is a list of all CABI product codes:

```
CA    CAB Abstracts 1973-Current
X0    CAB Abstracts Archive
HE    Global Health 1973- Current
X9    Global Health Archive
ZS    CAB Abstracts + Global Health 1973-Current

7B    AgBiotechNet Database
ZA    Animalscience Database
ZD    Nutrition and Food Sciences Database
TR    ForestScience Current Database
XF    ForestScience Archive Database
3R    LeisureTourism Database
ZC    Organic Research Database
VE    VetMed Resource Database
ZG    Environmental Impact Database
FT    CABI Full Text
FR    CAB Reviews Current
FA    CAB Reviews Archive
FV    Distribution Maps of Plant Pests
FW    Distribution Maps of Plant Diseases
FX    Descriptions of Fungi and Bacteria
GF    CAB eBooks Current file
GA    CAB eBooks Archive file
B1    CAB eBooks Agriculture file
B2    CAB eBooks Animal&Veterinary file
B3    CAB eBooks Environment file
```

```
B4    CAB eBooks Human, Food, Nutrition file
B5    CABeBooks Leisure and Tourism
B6    CABeBooks Plant Sciences
8A    Agricultural Engineering
0E    Agricultural Entomology
7Y    Agroforestry
0A    Animal Breeding
0N    Animal Nutrition
5C    Aromatic&Medicinal Plants
7E    Biocontrol
YB    Biofuels
YA    Botanical Pesticides
7Q    Crop Physiology
0D    Dairy Science
0Q    Field Crops
1F    Forest Products
0F    Forestry
0G    Grasslands and Forage
0H    Helminthology
0C    Horticultural Science
0U    Human Nutrition
7S    Irrigation and Drainage
3R    Leisure, Recreation, Tourism
6P    Maize
0J    Medical and Veterinary Entomology
0L    Medical&Veterinary Mycology
0T    Nematology
7C    Ornamnental Horticulture
7D    Pig Science
0P    Plant Breeding
6C    Plant Genetic Resources
7W    Plant Growth Regulators
0M    Plant Pathology
7H    Postharvest Research
7K    Potatoes
7A    Poultry
0Y    Protozoology
1T    Public Health
7U    Rice
2R    Rural Development
7G    Seed Science
0S    Soils and Fertilizers
7N    Soyabeans
1C    Sugar Industry
2T    Tropical Diseases
0W    Weeds
6T    Wheat
0I    Index Veterinarius
0V    Veterinary Bulletin
VE    Veterinary Medicine
0R    World Ag.Economics and Rural Sociology
```

13.2   Field tag list

You can use field tags (or codes) to narrow search results to specific index fields in the CABI database, for example, `ca:"World Health Organization"`

Here is a list of all index field names and their tag codes:
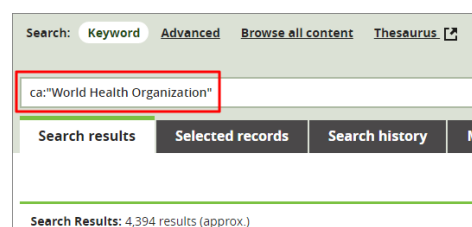
Note. The **Title** index field is a 'super field' and is designed for easier, targeted searching. When you search using `title:` CAB Direct searches the record title, the subject and all author fields. To use the title index field, type as follows: `title:Coleoptera`

Index field name	Code
Abstract	ab
Additional Authors	ad
Author Affiliation	aa
CABICODES	cc
CAS Registry Numbers	ry
Conference Dates	cd
Conference Title	ct
Corporate Author	ca
Country of Publication	cp
Descriptors	de
Digital Object Identifier	oi
Document Editors	ed
Document Title	do
Email	em
English Item Title	et
Non English Item Title	ft
Geographic Location	gl
Identifiers	id
ISBN	bn
ISSN	sn
Item Type	it
Language(s) of Summary	ls
Language(s) of Text	la
Location of Publisher	lp
Main Abstract	ab
Organism Descriptors	od
Pan Number	pa
Personal Author	au
Personal Author Variants	av
Publisher	pb
CABI Product Code	sc
Broad Terms (or, Up-posted Descriptors)	up
Web URL	ur
Year of Publication	yr

Training Resources

14 Training Resources

CAB Direct user guides:

CAB Direct complete User Guide

CAB Direct Quick Guide

Training Videos:

Here is a list of training videos available to view and share:

Simple searching

Advanced searching

Refining results

Selecting and exporting records

Finding similar records

Highlighting and annotating records

Training Webinars:

Date and time	Session title	Duration	Signup
24th August 2016 8:30 (BST)	CAB Direct - Introducing the next generation platform	30 minutes	Register
24th August 2016 16:00 (BST)	CAB Direct - Introducing the next generation platform	30 minutes	Register
28th September 2016 8:30 (BST)	CAB Direct - Introducing the next generation platform	30 minutes	Register
28th September 2016 16:00 (BST)	CAB Direct - Introducing the next generation platform	30 minutes	Register