New CAB Direct Platform - External FAQs (updated 15/08/16)

General Questions

What are the new features and can you explain them?

A: The new platform is designed with the principles and methods of user-centred design, and offers a much improved experience for users. Here is a general overview of the new features:

Search
Powerful new search features to help you to:
- Combine multiple facets with Boolean logic to quickly focus your search
- Find similar records
- Edit long searches quickly and effectively

Browse
You can browse through:
- Authors
- Topics
- Serials – made available from 2nd August product release

Analyse
New visualisation tools for year of publication and other key index fields to help you:
- analyse your search results visually
- drill down quickly to find the most relevant results

Highlight and annotate
New highlighting and annotation tools so you can:
- highlight points of interest and add your own notes
- store your notes and highlights in your projects area or export them

Projects
Create an unlimited number of projects to help you:
- organise your searches and records
- track your activities in a project
- share your results and activities with colleagues

What are the functionality differences between the old and new platforms?

New Features	New CAB Direct platform (released July 5th 2016)	Old CAB Direct platform
Select multiple terms within a facet	Yes	No
Ability to vary Boolean operators between terms within a facet refine (OR, AND, NOT)	Yes	No
Simultaneously select terms from multiple facets to refine	Yes	No
View similar records from Abstract level	Yes	Only based on a single individual field
View similar records based on multiple indexing fields that you can select	Yes	No
Actionable Visualization for Year results and key fields	Yes: Year, Topics, Organism Descriptors, Broader Terms, Geographic Location	No
Highlight	Yes	No
Annotate	Yes	No
Save Records to personal Projects Workspaces	Yes	My CABDirect enables saving records
Save Searches to personal Project Workspaces	Yes	My CABDirect enables saving of searches
Export a detailed log of your Project activities (especially useful for continued long-term activities)	Yes	No
Browse	CAB Thesaurus (initially as per the old platform, but later will be integrated), CABICODE, Author, Publications	CAB Thesaurus (not integrated)

How does Explore Similar Records work?

Explore Similar Records uses the indexing on the record that you are looking at to find records in the database that have similar patterns of indexing. Each record uses several indexing fields and an algorithm ranks the terms in each of these index fields by importance. CAB Direct then looks at the top five ranked terms for the record you are viewing, and uses them to find the most similar records, within your subscriptions. The fields that it uses from the CAB Thesaurus are: Preferred Terms, CABI Codes, Alternative Terms, and it also uses words in the abstract and title of the record.

Search similar provides a different way of finding content that is related to what you are looking at. Sometimes it can pull up some records that appear to be unrelated. For example, if the record that you are looking at is on the distribution maps of a particular pest, then it may recall records about other distribution maps because the term "distribution map" is important within the context of the record. They are related in their indexing, even if the subject areas are not similar.

It says "approx." beside the search results count. Why is this?

We use an index to quickly search and sort the very large volumes of content in our database. The quoted number of results comes from the number of times your search terms are found in the index, and is a very close approximation to the actual number retrieved. To ensure this is fully transparent to our users, the labelling "approx." has been applied. The results listed in the results page(s) are all of the records that contain your search terms and are 100% accurate.

Sometimes there may be a small difference between the first approximate count and the definitive, exactly accurate, set of results that are actually returned. CABI uses the latest technology and web standards in its search services, and is consistent with the way other major search platforms work.

Are all features in the old platform available under the new CAB Direct?

No.

In response to customer feedback and industry trends, we have decided to discontinue two features. In each case, these are being replaced with improved alternatives.

1. Roaming Passport: By saving a Passport to your laptop, tablet or mobile device, this feature allowed you to take the old CAB Direct with you wherever you went. In the new platform, this is being replaced by an improved form of off-site authentication, OpenAccess ID, which will be implemented by early 2017.

2. Direct MARC records export (eBooks): In response to customer feedback, we started producing and supplying full-level MARC records separately from CAB Direct in 2013. These are created manually by human catalogers using the RDA cataloguing standard and with full authorized Library of Congress subject headings. They are available for download from our CABeBooks site www.cabi.org/cabebooks/marc-records

Making the Transition to the new Platform

When did the old platform cease?

After an extensive period of Beta testing the old CAB Direct platform was replaced by the new CAB Direct on July 5th 2016.

Has the URL change?

No, after the Beta period, the new platform ran on www.cabdirect.org (the original domain name).

Are my credentials still valid? Yes, the same customer profiles along with preferences and account settings continue to work on the new platform.

Has my usage stats account login remained the same?

Yes, the portal for accessing usage statistics remains the same, and there has been no interruption to your COUNTER4 usage statistics service.

Is there any change to how the usage is reported?

No, there is no change to how the COUNTER4 usage statistics are reported.

What do I need to do to transition to new platform?

Nothing. Your account settings were transferred automatically by CABI, including any IP ranges, log-ins etc.

I had a My CABDirect account; have my details been migrated to a new My CABI account?

On launch day, July 5th, CABI automatically created a My CABI account for each My CABDirect user, with the same username as they previously had. We migrated any saved searches, saved records and email alerts, from the old to the new platform.

Do I need to sign any Licence Agreements?

All subscribing institutions must sign a Licence Agreement, detailing the conditions of purchase of CABI resources. Those institutions that have existing agreements in place with CABI do not need a new agreement relating to the new CAB Direct platform. The revision of the standard licence agreements remains a standard part of the renewal process.

Technical Questions

Is the new platform compatible with remote access technologies?

Yes, the new platform is compatible with the same remote access technologies as the old platform – Shibboleth and OpenAthens.

Does the new platform work with all internet browsers?

Yes, the new CAB Direct works on the main browsers including Chrome, Firefox and versions of IE and Safari.

Does the new platform work on mobile devices?

The full version of the new platform works well on touchscreen tablet devices as small as the iPad mini.

There will be a dedicated mobile version of the platform for smartphone users in the Autumn 2016.

As well as the functionality differences in the platform are there any changes in the basic features (e.g. default timeout, compatibility with different internet browsers etc)?

We apply the same standards across all sites and will continue to do so. There are no changes to these features.

Is the export function compatible with services such as Ref Works, Mendeley etc?

The new platform supports record exports in RIS and BIBTEXT formats which covers all major reference management software packages. There is a direct export into Ref Works and EndNote as there was on the old platform. CABI will consider developing further direct export features into other reference managers on a case-by-case basis.

How do the searching algorithms work with regards to relevancy, ranking and Boolean logic?

The search works with all of the existing Boolean functionality. Search results for Relevancy are based upon finding the search term in the indexing fields, the title, and the abstract, which enables us to provide a ranking of relevancy. The results of the relevancy ranking are slightly different from those on the old CAB Direct platform as we are using different technologies in the new platform.

Can I access my saved records offline?

You can export saved records and save them locally for access offline. In order to view saved records in CAB Direct, you will need to be online and signed in to your My CABI account.

Does the new platform support foreign languages?

Not currently, but we are actively investigating the implementation of foreign language support for simplified Chinese, Arabic and Spanish, on the platform itself. Additional languages will be investigated if a need is identified.

Does the platform follow Accessibility Guidelines?

Every effort has been made to meet the W3 Web Accessibility Guidelines and we undertake rigorous testing to ensure compliance. Further details are available here: www.cabi.org/accessibility

My Projects Questions

What is My Projects?

My Projects allows users to set up projects to manage their searches, saved records, highlights and annotations. It enables users to export an accurate log of their actions for M&E purposes, and removes some of the administrative burden of having to document their search strategies. It enables sharing, and eventually collaboration.

Will I be able to collaborate 'My Projects' with others who don't have a subscription to CAB Direct or another institution?

You can share your saved records, exported project records and project activity log with anyone via email.

Customer Support Questions

How should I report any technical issues?

Any issues accessing the new platform in the months after launch should be reported to support@cabi.org

What training is available post launch?

There is detailed context sensitive help in-built in the new platform. This covers all areas of functionality and integration with library systems. There will be regular online training webinars scheduled throughout the year. There are also some video tutorials.

Please visit:

http://www.cabi.org/publishing-products/resources-for-database-users/

How can I contribute to the future development of the platform?

Our customers and their feedback are vital to the future development of CAB Direct platform.

If you have any comments or feedback on specific functionalities, you can discuss these with your CABI account manager (listed below), or alternatively email support@cabi.org

How frequently do you release changes to the platform?

CAB Direct is developed and hosted by CABI, enabling CABI to respond to customer feedback through enhancements to the platform and to fix bugs continually. Code releases are made regularly throughout the year. We post release notes about additions, changes and fixes to the platform on the About page.

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