

CAB Direct Platform - External FAQs (updated January 2017)

CAB Direct is CABI's online database platform, providing a single point of access to all of your CABI database subscriptions. The platform was re-launched in July 2016.

General Questions

What are CAB Direct's features and can you explain them?

CAB Direct's functionality has been designed with the principles and methods of user-centred design in mind, and offers a much improved experience for users against earlier versions. Here is a general overview of the features of the platform:

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
- Serials – three options: alphabetically, by ISSN or by title
- Subject
- CAB Thesaurus

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

Here is a summary of the functionality improvements released in 2016

New Features	New CAB Direct platform (released July 5 th 2016)	Old CAB Direct platform
Select multiple terms with a facet refine	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 for Serials, Author, Subject, Thesaurus terms	Yes	Only browse in 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 earlier platform available under the version of CAB Direct launched in 2016?

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 mid-year 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

Technical Questions

Is CAB Direct compatible with remote access technologies?

Yes, CAB Direct works with the Shibboleth and OpenAthens remote access technologies. To enable access we need to know your Organization ID and Entity ID.

CAB Direct also works with EZ Proxy web proxy server. For information about this please see <http://www.oclc.org/support/services/ezproxy/documentation/db/cabdirect.en.html>

Does CAB Direct work with all internet browsers?

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

Does CAB Direct work on mobile devices?

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

A dedicated mobile version of the platform for smartphones is currently being developed and due to be released before March 2017.

What is the timeout duration for CAB Direct?

30 minutes.

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

CAB Direct 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 the .RIS format can be exported directly into EndNote, based on settings for the version of EndNote you have. 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.

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 CAB Direct 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

What kind of usage statistics are available for CAB Direct?

Customers can obtain COUNTER4 usage reports for all products delivered on the CAB Direct platform. Usage events will be logged as coming from CAB Direct under the platform column in these reports.

Please also note that any events recorded prior to July 2016 are logged on a separate line, as coming from CAB Direct3; this is because COUNTER rules do not allow amalgamation of events captured from separately hosted sources, so to differentiate between the recent and earlier versions of CAB Direct, events logged on CAB Direct prior to July 2016 are reported separately.

For further information please see our COUNTER4 FAQ sheet accessible from:

<http://www.cabi.org/publishing-products/information-for-librarians/usage-statistics/>

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 CAB Direct platform should be reported to support@cabi.org

What training is available for CAB Direct?

CAB Direct has detailed context sensitive help. This covers all areas of functionality and integration with library systems. There are regular online training webinars scheduled throughout the year.

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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