<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Searching and browsing on CAB Direct</td>
<td>3</td>
</tr>
<tr>
<td>2.</td>
<td>Keyword Searching</td>
<td>4</td>
</tr>
<tr>
<td>2.1</td>
<td>Search Rules</td>
<td>5</td>
</tr>
<tr>
<td>2.2</td>
<td>Boolean Operators</td>
<td>6</td>
</tr>
<tr>
<td>3.</td>
<td>Advanced searching</td>
<td>7</td>
</tr>
<tr>
<td>4.</td>
<td>Browsing content</td>
<td>8</td>
</tr>
<tr>
<td>5.</td>
<td>Search results</td>
<td>9</td>
</tr>
<tr>
<td>5.1</td>
<td>Refining search results</td>
<td>10</td>
</tr>
<tr>
<td>5.2</td>
<td>Edit Search</td>
<td>12</td>
</tr>
<tr>
<td>5.3</td>
<td>managing records</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td>Performing actions on your results</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>Highlighting and annotating records</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Building searches from index terms</td>
<td>16</td>
</tr>
<tr>
<td>5.4</td>
<td>Managing your searches</td>
<td>16</td>
</tr>
<tr>
<td>5.5</td>
<td>Performing actions on your searches</td>
<td>16</td>
</tr>
<tr>
<td>6.</td>
<td>My Projects tab</td>
<td>18</td>
</tr>
<tr>
<td>6.1</td>
<td>Managing project contents</td>
<td>20</td>
</tr>
<tr>
<td>6.2</td>
<td>Activity Log tab</td>
<td>20</td>
</tr>
<tr>
<td>6.3</td>
<td>Records tab</td>
<td>21</td>
</tr>
<tr>
<td>6.4</td>
<td>Searches tab</td>
<td>21</td>
</tr>
</tbody>
</table>
1. SEARCHING AND BROWSING ON CAB DIRECT

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 all 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.
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**.
### SEARCH RULES

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

<table>
<thead>
<tr>
<th>Search term</th>
<th>Search Rule</th>
<th>Examples and exceptions</th>
</tr>
</thead>
</table>
| 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 any group 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 any single character                  | wom?n matches woman and women                                                                                                                                  |
| Wildcards * and ?                  | * and ? may be combined                           | Organ?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                                                                                                                 |
| 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                                                                                                                   |
| 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, enter ca:"World Health Organization" |
|                                    |                                                  | Click here 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 for a full list of field names and tags.                                                                                                           |
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 **AN**Ded 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 **And** drop-down to use Boolean operators to link and refine your search terms. For more information see **Boolean Operators**.

*Tip.* Use the **NOT** operator carefully, as it is possible to lose relevant records by accident.
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). Use the index field drop-down list to refine your advanced search by selecting the appropriate index field for your search terms:

![Advanced search screen](image)

### ADDITIONAL FILTERS

Once you have entered a search terms in the search boxes, you can refine your search by applying additional filters as follows:

<table>
<thead>
<tr>
<th>Screen field</th>
<th>Limit your search to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Published between</td>
<td>a range of publication dates of the original papers</td>
</tr>
<tr>
<td>Added since</td>
<td>those records added since your previous search, for example</td>
</tr>
<tr>
<td>Document type</td>
<td>specific documents types, such as books and conference proceedings</td>
</tr>
<tr>
<td>Only search for</td>
<td>• <strong>CABI Hosted Full Text.</strong> Publications which are hosted but not published by CABI, e.g conference proceedings, smaller publishers' journals etc. These are typically referred to as 'grey' literature.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Evidence Based Research.</strong> Designed to retrieve systematic review and meta-analyses by searching for elements in a publication's title and abstract.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Open Access Journals.</strong> 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.</td>
</tr>
<tr>
<td>Search in</td>
<td>one or more CABI products</td>
</tr>
</tbody>
</table>
4. BROWSING CONTENT

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

- by Subject, use CABICODES to browse broad areas of interest to which you have access,
- by Author, browse/search alphabetically to select author names,
- by Journal, browse by publication title.
5. SEARCH RESULTS

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.
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.

![Results by Year](image)

**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.

![Facets](image)

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:
To refine your search by facet:

1. Select the facet you want to refine your 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 simply close the facet using the close button and open another facet. Do not click the Refine results button yet. The combined facets are displayed on each facet window.

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 Using Edit Search.
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.

![Edit Search button](image)

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

MANAGING 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.

![Check-box](image)

**Note.** CAB Direct automatically copies your selected records to the Selected Records tab. They are retained on the system only for the duration of your current CAB Direct session. To save your selected results for future use, you must first sign in to My CABI.
PERFORMING ACTIONS ON YOUR RESULTS

CAB Direct enables you to perform actions on your search results, such as print, download, etc. using toolbar buttons.

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.

If you are logged in to My CABI you can save records or add them to a project. The Saved records tab contains both selected records and saved records.

The following actions can be performed from:

- Search results
- Selected records
- Saved records
- Project records
- Abstract page
For some actions you need to be signed in to My CABI:

<table>
<thead>
<tr>
<th>Action</th>
<th>Instructions</th>
</tr>
</thead>
</table>
| Print records    | • Select records and press **Print** from the Action toolbar  
• Print a) citation only, b) citation and abstract, or c) full record                                                                 |
| Email record/s   | • Select records and press **Email** from the Action toolbar  
• Enter the email address  
• select a) citation only, b) citation and abstract, or c) full record                                                                 |
| Download record/s| • Select records and press **Download/export** from the Action toolbar  
• Select ‘Download to file’ or RefWorks  
• Select a file format if you have selected download to file  
• To export to RefWorks you need a RefWorks account  
• select a) citation only, b) citation and abstract, or c) full record  
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 |
| Save record/s    | • Select records and press **Save** from the Action toolbar  
• You need to have a My CABI account to save a record. If you are not already logged in you will be prompted to log in or create an account  
• If you have created projects you are given the opportunity to save records to a project instead  
• Records are saved to **Saved records** on **My Records** tab.  
Note: Saved records show with [icon.](#) |
| Add to Project   | • Select records and press **Add to project** from the Action toolbar  
• You need to have a My CABI account to add a record to a project. If you are not already logged in you will be prompted to log in or create an account  
• Select the project and press ‘Add to project’ button |
HIGHLIGHTING AND ANNOTATING RECORDS

You can use the tools on a record page to:

- Highlight passages of text
- Add annotations to the abstract

To highlight:

- Click the highlight tool and select the highlight colour (if you have not signed into My CABI you are prompted to do so)
- Select the text you want to highlight then click the highlight icon
- 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.

To annotate:

- Click the annotate tool (if you have not signed into My CABI you are prompted to do so)
- Select the text you want to annotate then click the annotate icon
- In the Add annotation window, type the Annotation title and text
- Click the save button to add the annotation to the abstract

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.
BUILDING SEARCHES FROM INDEX 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:

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.

MANAGING YOUR SEARCHES

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.

If you are signed in to My CABI you can save your searches for future use or add them to a project. If you are logged in the My Searches tab contains your search history and saved searches.

PERFORMING ACTIONS ON YOUR SEARCHES

The following actions can be performed from:

- Search history
- Saved searches
- Search results
- Project searches
<table>
<thead>
<tr>
<th>Action</th>
<th>Instructions</th>
</tr>
</thead>
</table>
| **Save search**  | You can save a search from the search results tab using the **Save search** button, or from Search History by:  
• Selecting the search(es) and press **Save** from the Action toolbar  
• You need to have a My CABI account to save a search. If you are not already logged in you will be prompted to log in or create an account  
• If you have created projects you are given the opportunity to save searches to a project instead  
• Searches are saved to **Saved searches** on **My Searches** tab.  
•                                                                                                                                               |
| **Create an email alert** | Select search(es) from either Saved searches or Search history and press **Email alert** from the Action toolbar  
• You need to have a My CABI account to create an email alert. If you are not already logged in you will be prompted to log in or create an account  
• Enter the email address  
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.  
•                                                                                                                                               |
| **Add to Project** | Select search(es) and press **Add to project** from the Action toolbar  
• You need to have a My CABI account to add a search to a project. If you are not already logged in you will be prompted to log in or create an account  
• Select an existing project, or create a new one and press **Add to project** button  
•                                                                                                                                               |
| **Combine searches** | Select the searches you want to combine  
• Select the Boolean operator AND, OR or NOT  
• Press **Combine searches** button  
•                                                                                                                                               |
| **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.
6. 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 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:

<table>
<thead>
<tr>
<th>Create new projects</th>
<th>1. Click <strong>Create New project</strong> to display the <strong>Create a project</strong> window.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. Type the name and description of your new project, then click the <strong>Create project</strong> button.</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Change view</th>
<th>To change the default display of projects from a 'grid' to a 'list' (or vice versa), click the appropriate <strong>Change view</strong> toolbar button:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Change a project name</th>
<th>To re-name a project:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Click the project name to open the <strong>Activity Summary</strong> list.</td>
</tr>
<tr>
<td></td>
<td>2. Click the <strong>Edit</strong> button.</td>
</tr>
<tr>
<td></td>
<td>3. Edit the name as required, then click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>
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.

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

**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.

**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.

---

**RECORDS TAB**

The Project Records tab displays details of the records in a project. From here you can print, email, download records.

**SEARCHES TAB**

The Searches tab displays details of the searches in a project. From here you can create email alerts for a search, or combine searches. You can also create a note for a search.