

CABI Training Materials

CAB Direct

Quick Guide

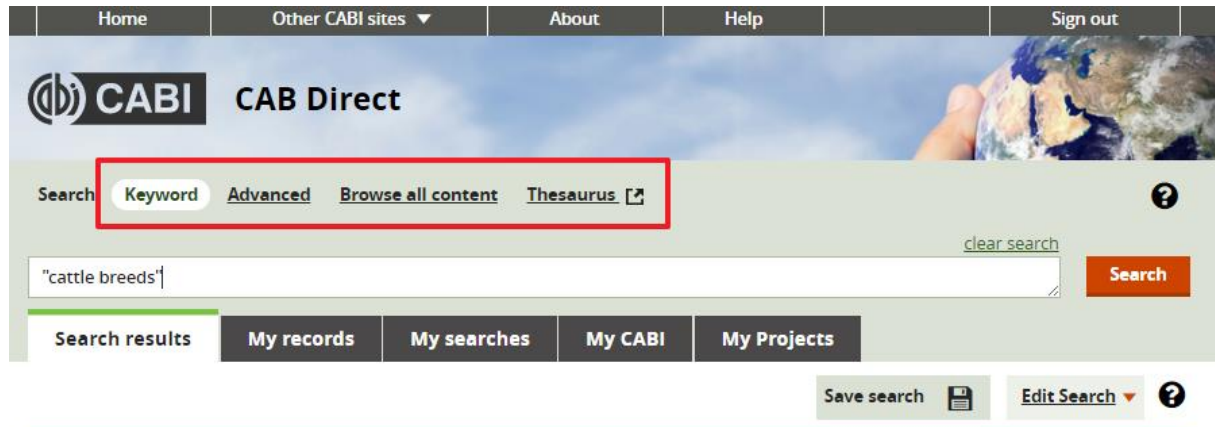
CONTENTS

CONTENTS

- 1. Searching and browsing on CAB Direct 3
- 2. Keyword Searching..... 4
 - 2.1. Search Rules 5
 - 2.2. Boolean Operators 6
- 3. Advanced searching 7
- 4. Browsing content 8
- 5. Search results 9
 - 5.1. Refining search results 10
 - 5.2. Edit Search..... 12
 - 5.3. managing records..... 12
 - Performing actions on your results 13
 - Highlighting and annotating records..... 15
 - Building searches from index terms..... 16
 - 5.4. Managing your searches 16
 - 5.5. Performing actions on your searches..... 16
- 6. My Projects tab 18
 - 6.1. Managing project contents 20
 - 6.2. Activity Log tab..... 20
 - 6.3. Records tab 21
 - 6.4. Searches tab 21

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**.



Search Results: 1 result

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.

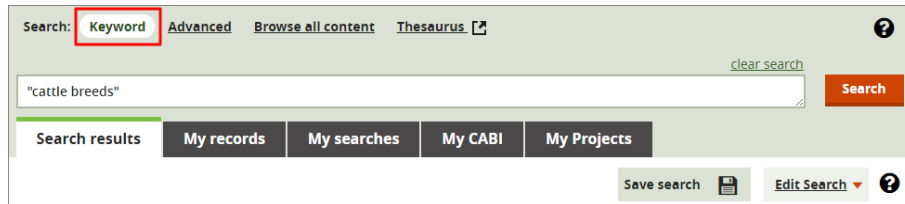
Advanced searching, on the other hand, enables you to easily narrow your search to the index fields most relevant to your search. You can filter your search by database field, (e.g. article title, author name, publisher etc.), date, document type, CAB product etc.

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

Use the CAB **Thesaurus** to search CAB'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.

The image shows a screenshot of the CAB Direct search interface. At the top, there is a search bar with the text "Search: Keyword" and a red box around the word "Keyword". To the right of the search bar are links for "Advanced", "Browse all content", and "Thesaurus". Below the search bar is a text input field containing the text "cattle breeds". To the right of the input field is a "clear search" link and a red "Search" button. Below the search bar is a navigation menu with tabs for "Search results", "My records", "My searches", "My CABI", and "My Projects". At the bottom right of the search bar area are buttons for "Save search" and "Edit Search".

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:

| 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 |
| 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: <ul style="list-style-type: none">• 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 ANDed 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:

The screenshot shows the 'Advanced' search interface. At the top, there are tabs for 'Keyword', 'Advanced' (highlighted with a red box), 'Browse all content', and 'Thesaurus'. Below the tabs are three search boxes, each with an 'Enter keyword search' placeholder and an 'in' dropdown menu set to 'All fields'. The search boxes are connected by 'And' operators. Below the search boxes is an 'Add +' button. Further down, there are filter options: 'Published between : YYYY and YYYY', 'Added since :', 'Document type : All types', 'Only search for', and 'Search in : Your products'. A 'Search' button is located at the bottom right.

ADDITIONAL FILTERS

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

| | |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Screen field: | Limit your search to... |
| 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 | <ul style="list-style-type: none"> • 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 |

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.

Search: [Keyword](#) [Advanced](#) **[Browse all content](#)** [Thesaurus](#) [?](#)

Browse by:

- +** [Animal Science \(General\) - \(LL000\)](#)
- [Aquatic Sciences \(General\) - \(MM000\)](#)
 - [Aquaculture \(Animals\) - \(MM120\)](#)
 - [Aquaculture \(Plants\) - \(MM130\)](#)
 - [Aquatic Biology and Ecology - \(MM300\)](#)
 - [Fisheries - \(MM110\)](#)
- +** [Biotechnology \(General\) - \(WW000\)](#)
- +** [Economics \(General\) - \(EE000\)](#)
- +** [Education, Extension, Information and Training \(General\) - \(CC000\)](#)
- +** [Engineering and Equipment \(General\) - \(NN000\)](#)
- +** [Food Science and Food Products \(Human\) - \(QQ000\)](#)
- +** [Forage and Feed Products \(Non-human\) - \(RR000\)](#)
- +** [Forestry, Forest Products and Agroforestry \(General\) - \(KK000\)](#)
- +** [Human Health and Hygiene \(General\) - \(VV000\)](#)
- +** [Miscellaneous](#)
- +** [Natural Resources \(General\) - \(PP000\)](#)
- +** [Non-food/Non-feed Agricultural Products \(General\) - \(SS000\)](#)
- +** [Other Sciences - \(ZZ000\)](#)
- +** [Pathogen, Pest, Parasite and Weed Management \(General\) - \(HH000\)](#)
- +** [Plant Science \(General\) - \(FF000\)](#)
- +** [Social Sciences \(General\) - \(UU000\)](#)
- +** [Soil Science \(General\) - \(JJ000\)](#)
- +** [Wastes \(General\) - \(XX000\)](#)
- +** [Zoology of Wild Animals \(Vertebrates and Invertebrates\) \(General\) - \(YY000\)](#)

Subject Browse

- Subject browse uses CABICODES which are CABI's own classification codes for broad subjects that would be difficult to describe with keywords alone.
- Each database record is assigned with at least one CABICODE which describes the relevant area of science.
- Click on a subject area to search for all records coded with that CABICODE.
- Open each top category by clicking on the + to see the full array of topics for that area.
- The CABICODE organization is hierarchical so if you click one of the top categories, this automatically includes all its subsections in your search.

5. SEARCH RESULTS

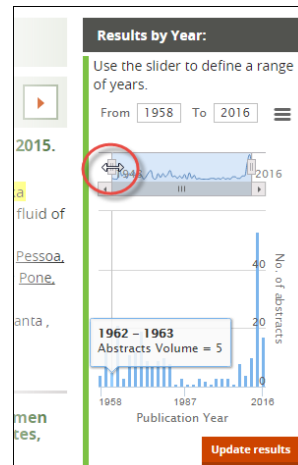
The **Search results** tab displays the results of your searches (**Keyword** or **Advanced**) and browsing (**Browse all Content**). Each search result shows a shortened version of the main record and includes the record title, the first few lines of the abstract and the main bibliographic details.

The screenshot shows the search results page for the keyword 'zika'. The page includes a search bar at the top with tabs for 'Keyword', 'Advanced', 'Browse all content', and 'Thesaurus'. Below the search bar are navigation tabs: 'Search results', 'Selected records', 'Search history', 'My CABI', and 'My Projects'. A 'Save search' button and an 'Edit Search' dropdown are also visible. The main content area displays a list of search results, with the first three results visible. Each result includes a title, a short abstract, and bibliographic information. A 'Results by Year' chart is located on the right side of the page, showing the number of results per year from 1940 to 2018. A 'Refine by' sidebar is also present on the right, with various filters like 'Topics', 'Organism Descriptors', 'Broader terms', etc. Annotations with red arrows point to various features: 'This tab displays the results of your searches.' points to the 'Search results' tab; 'Use results' Actions to print, email, download, save to My CABI and add to a project.' points to the 'Actions' icons; 'Results you tick are automatically listed on the Selected records tab.' points to the checkbox next to the second result; 'Click on a title to open the full abstract which you can then annotate and highlight.' points to the title of the third result; 'Log in to My CABI to save your searches, including refinements.' points to the 'My CABI' tab; 'Refine results by year of publication.' points to the 'Results by Year' chart; 'Use the date slider to define a range of years.' points to the date range selector in the chart; 'Refine results by important headings (or facets).' points to the 'Refine by' sidebar; and 'Use external sites to compare your search results.' points to the 'Find results from other sites' section.

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.

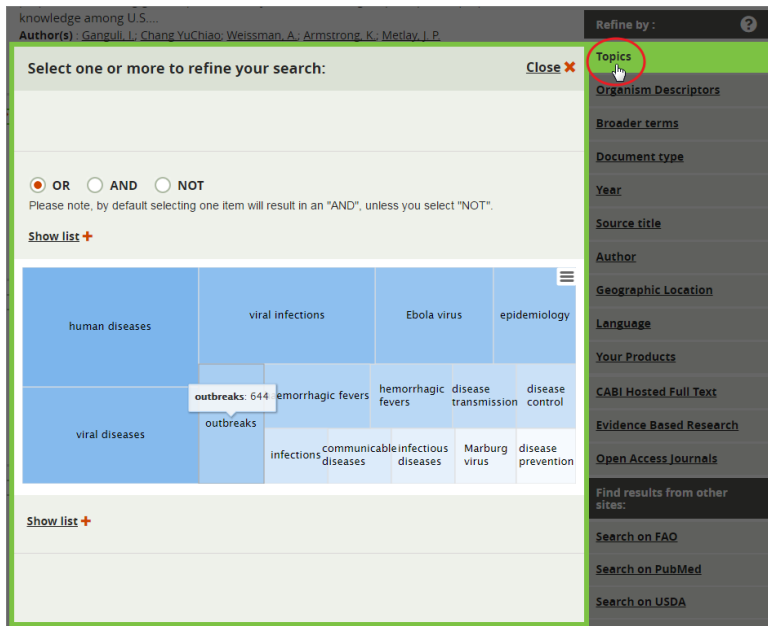


Facets are index terms applied by CABI indexers to each abstract according to important headings, such as topics, organism descriptors, author, year of publication, etc. Use facets to see which indexed terms occur most frequently in a record to get more specific search results.



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:

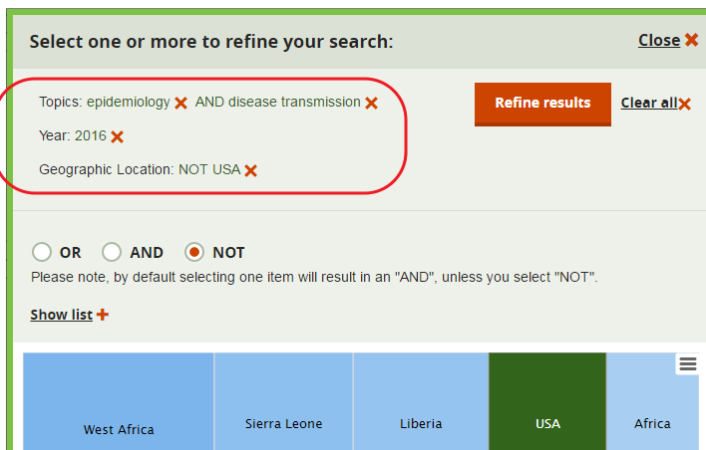


Tip. To see all terms and their frequency as a selectable list, click the **Show more +** button.

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 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.

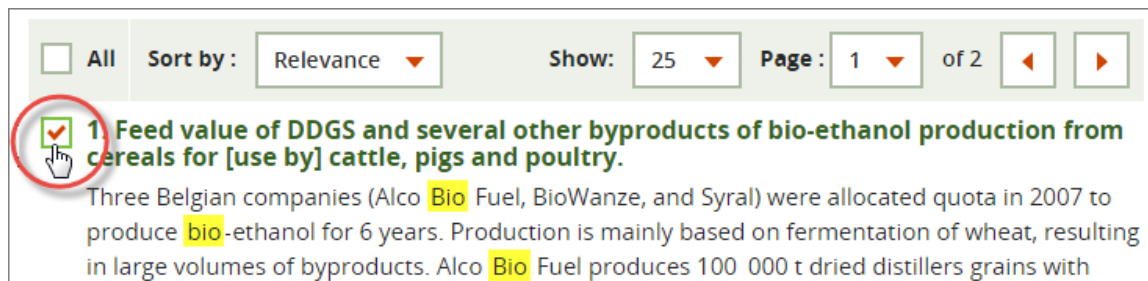


Note. The **Edit Search** is an advanced feature of CAB Direct and care and knowledge is required to edit a search statement successfully.

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.



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.

The screenshot shows the CAB Direct search interface. At the top, there are search options: "Keyword" (selected), "Advanced", "Browse all content", and "Thesaurus". The search bar contains the text "cattle breeds". Below the search bar are navigation tabs: "Search results" (selected), "Selected records", "Search history", "My CABI", and "My Projects". A "Save search" button is visible on the right. The search results section shows "Search Results: 57,291 results (approx.)". A toolbar with the following icons is highlighted with a red box: "Actions", a printer icon, an envelope icon, a document icon, a folder icon, and a plus icon. Below the toolbar, there are options for "All" (checked), "Sort by: Relevance", "Show: 25", and "Page: 1 of 2292". The first search result is titled "1. Comparison of linkage disequilibrium levels in Iranian indigenous cattle using whole genome SNPs data." and includes background information, author details, publisher information, and a journal article reference.


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:

| Action | Instructions |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Print records | <ul style="list-style-type: none"> • Select records and press Print from the Action toolbar • Print a) citation only, b) citation and abstract, or c) full record |
| Email record/s | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 <p>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</p> |
| Save record/s | <ul style="list-style-type: none"> • 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. <p>Note: Saved records show with  icon.</p> |
| Add to Project | <ul style="list-style-type: none"> • 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

The screenshot shows a record page with a navigation bar at the top containing 'Search results', 'Selected records', 'Search history', 'My CABI', and 'My Projects'. Below the navigation bar, there are links for 'Back to results page' and 'Next result'. A toolbar labeled 'Actions' contains icons for printing, email, download, and a plus sign. To the right of the toolbar is a 'Tools' section, which is highlighted with a red box and contains icons for highlighting, annotation, and help. Below the toolbar, the record title is 'Comparison of linkage disequilibrium levels in Iranian indigenous cattle using whole genome SNPs data.' The author information includes 'Author(s): Karimi, K.; Koshkoiyeh, A. E.; Gondro, C.', 'Author Affiliation: Department of Animal Science, Faculty of Agriculture, Shahid Bahonar University of Kerman, Kerman, PB 76169-133, Iran.', 'Author Email: karim.karimi81@gmail.com', 'Journal article: Journal of Animal Science and Technology 2015 Vol.57 No.47 pp.(24 December 2015) ref.35', 'ISSN: 2055-0391', and 'URL: http://download.springer.com/static/p...'. On the right side, there is a section titled 'Explore similar records' with several links: 'Detection of single nucleotide polymorphism...', 'Genetic and economic aspects of applying...', 'Genomic prediction of genetic merit using...', and 'Inferring demography from runs of...'.

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:

Comparison of linkage disequilibrium levels in Iranian indigenous cattle using whole genome SNPs data.

Author(s) : Karimi, K.; Koshkolyeh, A. E.; Gondro, C.
Author Affiliation : Department of Animal Science, Faculty of Agriculture, Shahid Bahonar University of Kerman, Kerman, PB 76169-133, Iran.
Author Email : karim.karimi81@gmail.com
Journal article : *Journal of Animal Science and Technology* 2015 Vol.57 No.47 pp.(24 December 2015) ref.35
ISSN : 2055-0391
URL : <http://download.springer.com/static/p...>
Record Number : 20163149292

Abstract :
 Background: Knowledge of linkage disequilibrium (LD) levels among different populations can be used to detect genetic diversity and to investigate the historical changes in population sizes. Availability of large numbers of SNP through new sequencing technologies has provided opportunities for extensive research in quantifying LD patterns in cattle breeds. The aim of this study was to compare the extent of linkage disequilibrium among Iranian cattle breeds using high density SNP genotyping data. Results: A total of 70 samples, representing seven Iranian indigenous cattle breeds, were genotyped for 777962 SNPs. The average values of LD based on the r² criterion were computed by grouping all syntenic SNP pairwises for intermarker distances from 0 Kb up to 1 Mb using three distance sets. Average r² above 0.3 was observed at distances less than 30 Kb for Sistani and Kermani, 20 Kb for Najdi, Taleshi, Kurdi and Sarabi, and 10 Kb for Mazandarani. The LD levels were considerably different among the Iranian cattle breeds and the difference in LD extent was more detectable between the studied breeds at longer distances. Lower level of LD was observed for Mazandarani breed as compared to other breeds indicating larger ancestral population size in this breed. Kermani breed continued to have more slowly LD decay than all of the other breeds after 3 Kb distances. More slowly LD decay was observed in Kurdi and Sarabi breeds at larger distances (>100 Kb) showing that population decline has been more intense in more recent generations for these populations. Conclusions: A wide genetic diversity and different historical background

Explore similar records

[Detection of single nucleotide polymorphism...](#)

[Genetic and economic aspects of applying...](#)

[Genomic prediction of genetic merit using...](#)

[Inferring demography from runs of...](#)

[Comparison of genomic selection approaches...](#)

[Single nucleotide polymorphism in the...](#)

Show all similar records

Indexing terms for this record ?

Organism Descriptors : (4)

Descriptors : (9)

Identifiers : (5)

Broad Terms : (16)

GeographicLocation : (1)

Other sources of full text :

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

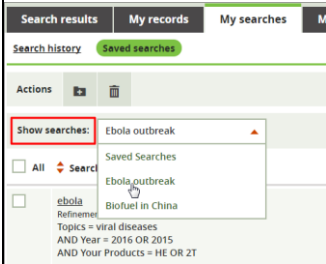
The searches you have made (Keyword and Advanced) are automatically added to the **Search history** list. The search terms you used and any refinements are retained only for the duration of your current CAB Direct session.

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

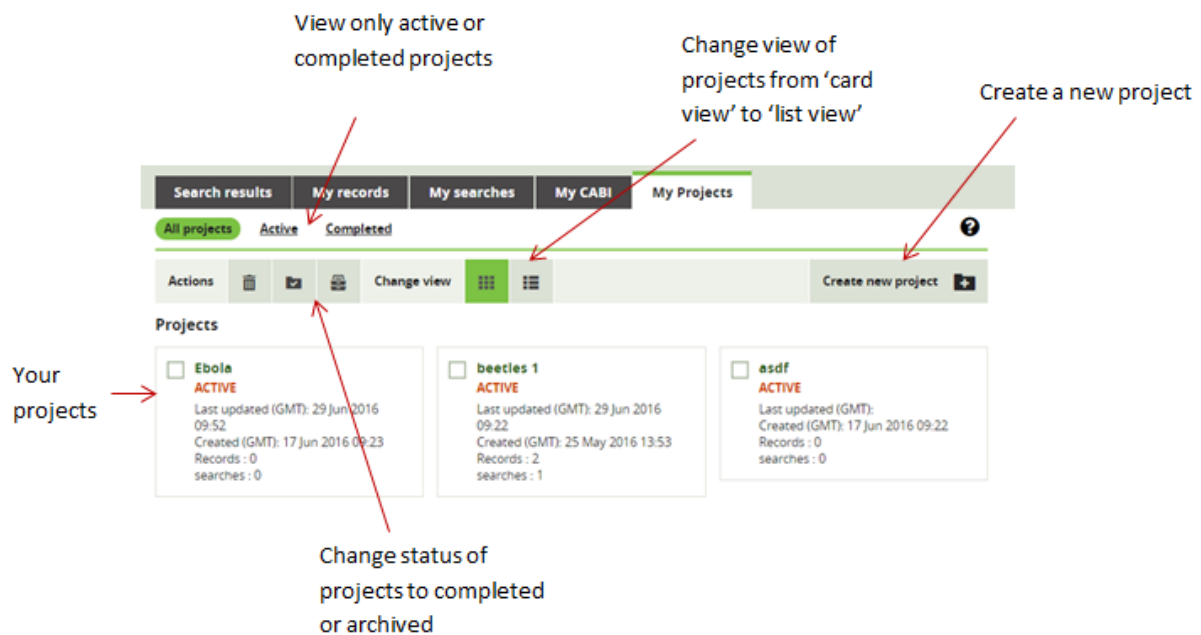
The following actions can be performed from:

- Search history
- Saved searches
- Search results
- Project searches

| Action | Instructions |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Save search | <p>You can save a search from the search results tab using the Save search button, or from Search History by:</p> <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 <p>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.</p> |
| Add to Project | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • Select the searches you want to combine • Select the Boolean operator AND, OR or NOT • Press Combine searches button |
| Sort by project | <p>Use the Show Searches drop-down list to display searches you have saved to a particular project.</p>  <p>Note. The Saved Searches option in the drop-down, displays only those saved searches which you have <u>not</u> added to a project.</p> |

6. MY PROJECTS TAB

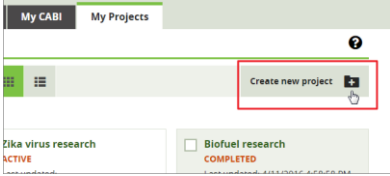
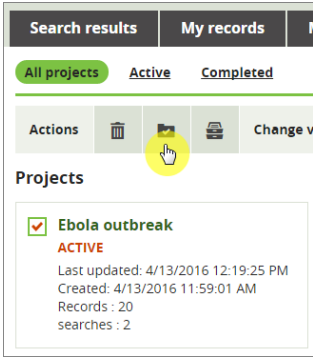
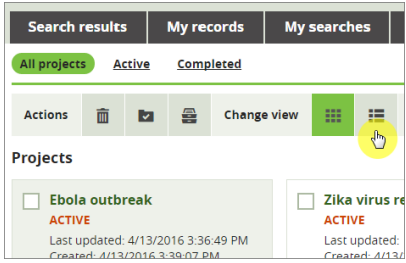

CAB Direct enables you to organise your search activities into projects. Projects are folders where you can save your records and searches about a particular topic.



Once you have logged in to My CAB 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:

| | |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Create new projects</p> | <ol style="list-style-type: none"> 1. Click Create New project to display the Create a project window.  <ol style="list-style-type: none"> 2. Type the name and description of your new project, then click the Create project button. |
| <p>Complete a project</p> | <p>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'.</p> <p>To complete a project, select the project's check-box then click the Complete Project button on the Actions toolbar.</p>  |
| <p>Change view</p> | <p>To change the default display of projects from a 'grid' to a 'list' (or vice versa), click the appropriate Change view toolbar button:</p>  |
| <p>Change a project name</p> | <p>To re-name a project:</p> <ol style="list-style-type: none"> 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. |

MANAGING PROJECT CONTENTS

Records saved into the project

Searches saved into the project

Project title → beetles 1

Log of project activity →

Export activity log as csv file

| Date (GMT) | Activity | Description/title | Count | Activity Note |
|-------------------|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|---------------|
| 25 May 2016 12:54 | Added Search | Search: beetle AND yr (2003 TO 2016) Show more | Number of Results: 25053 | Add note |
| 25 May 2016 12:53 | Added Record | Behaviours of phoretic mites (Acar) associated with <i>Ips pini</i> and <i>Ips grandicollis</i> (Coleoptera: Curculionidae) during host-tree colonization. | Number of Annotations: 0 | Add note |
| 25 May 2016 12:53 | Added Record | Rove beetles (Coleoptera Staphylinidae) - their abundance | Number of Annotations: 0 | Add note |


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.