Business Searching Interface (BSI)
User Guide

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Search Screens

Basic Search

On the Business Searching Interface, Basic Search provides both the ability to keyword search and a "lookup" feature that lets you search within the Indexes and Authority Files. You can also go directly to screens that let you browse Company Profiles, Industry Reports, Country Reports and Market Research Reports.

To conduct a Basic Keyword Search:

1. From the Basic Search Screen, enter search terms, select the **Keyword** radio button and click **Search**.
2. A Keyword search is run against the main database and a Result List is displayed. The search terms are retained in the **Find** field above the Result List.

- To return to Basic Search with your search terms retained, click **Refine Search**.
- To return to Basic Search with your search terms cleared, click the **Basic Search** tab.
- To carry your search terms and expanders over to Advanced Search, click **Advanced Search**.
To search an Index or Authority File:
1. From the Basic Search Screen, enter search terms, select a radio button other than Keyword and click Search.
2. The Index or Authority File you selected is displayed at the closest match to your search terms. If no terms were entered, the Index or Authority File displays at the beginning of the list.
3. Mark terms, add them to the Find field, and click Search. A Result List is displayed. Your search terms are retained in the Find field above the Result List.

To access Browse Screens:
1. From the Basic Search Screen, click on any of the links on the Browse area of the screen. (Company Profiles, Industry Reports, Company Reports or Market Research Reports.)
2. The corresponding Browse list of available profiles or reports is displayed. You can mark items, add them to the Find field, and click Search. A Result List displayed.
Advanced Search Screens

Advanced Search with Guided-Style Fields
If you click Advanced Search from a Basic Search Result List, your search terms are placed in the first search field on the Guided-Style version of Advanced Search. If the library administrator set any "hidden" expanders, they are also carried to Advanced Search.

To create an Advanced Search:
1. In the first Find field, enter a keyword. To remove search terms, click the Clear button. To reset limiters/expanders to their defaults, click the Reset button.
2. Choose the search field from the drop-down list (for example, search in only the Subject Terms field of the citation).
3. Repeat steps 1 and 2 for the second set of Find fields.
4. Select a Boolean operator (AND, OR, NOT) to combine the two Find field entries.
5. If you need additional rows, click the Add row link. Up to 12 rows can be displayed. To delete a row, click the Remove row link.
6. If a More Options link appears, you can click it to view all limiters and expanders that are available. You can add any of these limiters/expanders to your search. (To close this link, click Hide Options.)
7. Click **Search**. A Result List is displayed.

8. To refine your search from the Result List, click the **Refine Search** link. You will be returned to Advanced Search with search terms, limiters and expanders retained in the appropriate fields.

The Boolean Operators (And, Or, Not)

- **And** - combines search terms so that each search result contains all of the terms. For example, *travel AND Europe* finds articles that contain both *travel* **AND** *Europe*.

- **Or** - combines search terms so that each search result contains at least one of the terms. For example, *college OR university* finds results that contain either *college* **OR** *university*.

- **Not** - excludes terms so that each search result does not contain any of the terms that follow it. For example, *television NOT cable* finds results that contain *television* but **NOT** *cable*.

**Note:** If "Suggest Subject terms" is marked, but Field Codes are used, “Suggest” is ignored and a keyword search is run. If only limiters are selected, “Suggest” is ignored and a keyword search on the limiters selected is run.
Advanced Search with Pre-Selected Fields

The Company, Industry, Author and Publication fields are “pre-selected” search fields that can be used separately or in combination with the Keyword Find field on Advanced Search. The fields are connected via AND.

To create an Advanced Search using Pre-selected Fields:

1. From the Advanced Search Screen, enter terms in the Find field and combine with the pre-selected fields, or use them separately.

2. Click one of the links next to the pre-selected fields, e.g., Choose Company, etc.

3. A pop-up window displays the appropriate list (company, industry, author, publication). Select the terms from the list and click the Add to Search button. The terms are added to the pre-selected Find field. To clear the entry field, click Reset.
(If you enter terms in the pre-selected field before clicking on the lookup list link, you will be positioned to the nearest term in the list that matches your entry. Once you add terms from the list to the search, your previous entry in the pre-selected field is replaced by the newly added terms.)

4. Select any limiters that you want to apply. (If a More Options link appears, you can click it to view all limiters that are available. To close this link, click Hide Options.)

5. Click Search. A Result List is displayed.
6. To refine your search from the Result List, click the **Refine Search** link. You will be returned to Advanced Search with search terms, limiters and expanders retained in the appropriate fields.

**Notes:**

- Upon revising or re-running a line of search history for a search created with pre-selected fields back into the Advanced Pre-selected style screen, the search string, limiters and expanders are displayed in the appropriate boxes. (When the search terms are “posted,” that state is retained when the user revises or re-runs the search.)

- If you refine a search after following a persistent link to a search with pre-selected fields (and the link provides the user with full access to the Business Searching Interface), the search string is displayed in the top **Find** field, and limiters are displayed in the appropriate boxes on the Advanced Search Screen with pre-selected fields.

- If "Suggest Subject terms" is marked, but Field Codes are used, "Suggest" is ignored and a keyword search is run. If only limiters are selected, “Suggest” is ignored and a keyword search on the limiters selected is run.
Search History

All searches performed on the Advanced Search Screen are available from the Search History/Alerts tab. From this tab you can combine recent searches and retrieve previous searches saved in your personal folder.

**Note:** If enabled by your library administrator, Search History may also be available from Basic Search.

**To use your search history:**

1. On the Advanced Search Screen, when you click the **Search History/Alerts** sub-tab, all lines of Search History are displayed.

   ![Search History/Alerts Tab](image)

2. You can do any of the following:
   - Mark the lines of search you want to use and click the **Add** check box. You will be returned to the search screen with the lines of search added to the **Find** field. Click **Search**. A Result List is displayed.
   - Click the **RSS alert icon** to display and then copy the Syndication Feed URL into your newsreader.
   - Click a linked **View Results (xx)**. The search is automatically run and a Result List is displayed.
   - Click a **Revise Search** link. You will be returned to the search screen with the terms added to the **Find** field and any limiters/expanders marked. Click **Search**. A Result List is displayed.

3. To clear your search history, either click **Clear Search History**, or end your session.
   - The search history available to you includes only the searches from the current session. Unless you create a saved search, when your session ends, search history is cleared.
   - If you change databases, your search history is saved (the query only, not the result counts).
• If the limiters and expanders you applied in the original databases are not available when you change databases or search screens, your searches may be affected.

• If search history is opened in a new database, "Rerun" appears in the Results column. This indicates that the counts are not known because the search has not been run on your current database. When you view the results (by clicking on the "Rerun" link), a new search is launched and its results counts are added to the search history.

The Search History Screen

• **Combine searches with** - To combine lines of history, mark the check box to the left of the lines and select a Boolean operator (and, or, not) from the drop-down list, and click **Add**. The lines of history will be placed in the **Find** field.

• **Search ID #** - The number assigned to your search. You can also select a search from the list by entering S and the search number (S1, S2, etc.).

• **Search Terms** - The terms you entered in the **Find** field, including any field codes or Boolean operators. If you have set up the search as an RSS feed, the RSS logo will appear.

• **Limiters/Expanders** - The limiters and/or expanders used in your search are displayed.

• **Actions**
  - **View Results/Rerun** - Either **View Results** (xx) or **Rerun** appears as a hyperlink. Click the link to return the search and display an updated Result List.
  - **Revise Search** - Indicates that the lines of search can be edited. When you click **Revise Search**, the search terms are displayed in the Find field and the limiters and expanders. You can then edit the search manually, entering field codes or changing limiters on the Search Options area.
  - **View Details** - To view the details of the search, including which interface, search screen and database were used, click **View Details**. A pop-up window appears, displaying the details of the search.

• **Delete** - Indicates that individual lines of search history can be deleted. If you delete a line earlier within search history, any dependent lines are deleted, and the remaining lines of history are renumbered. A message displays when you delete lines of search history.
Visual Search

If a Visual Search tab appears, you can also search BSI and have your results presented in an interactive, visual map. You can switch between Result List styles at any time by selecting either Block style or Column style from the Display Style menu. Adobe Flash Player 8.x or higher is required when using Visual Search.

Columns Style Result List

To conduct a visual search:

1. Click the Visual Search tab at the top of the BSI screen.
2. Enter your search terms in the Find field.
3. Click Search. Your search results are displayed in columns. To follow a path, click on the subject (or publication) name. Your results are narrowed even further.

4. Results Sorting Options - To see different ways to group, sort, or filter your search, click any of the buttons above the Result List. You can select these options at any time – before you run your search, or after, when you are viewing your results.
   - **Group Results** – You can group by Subject or by Publication Name.
   - **Sort Results** – You can sort the results by Date (newest to oldest), or by Relevance (articles with the greatest relevance at the top of the list; those with the least relevance at the bottom of the list).
   - **Filter Results by Date** – Move the Date Range slider to filter from the newest articles to the oldest.
   - **Display Style** – Switch between the Blocks or Columns styles at any time.
To preview an article:

1. To view the citation, click the **article title** inside the result. The Summary window displays more information about the article, including Title, Author, Journal Name, and a brief abstract.

2. To view the full text of the article (if available), click the **More** link at the bottom of the citation. The Summary window will expand to display the full article.

To collect articles:

Use the Collect Articles area to "drag-and-drop" articles that you are interested in. Items that you "collect" will remain there for the current session, unless you remove them. You will need to collect the items that you want to save to your folder.
To save items to your folder:

1. With your Result List displayed, drag the articles to the **Collect Articles** area.

2. Click the **Add to Folder** link. The items are immediately added to your "session" folder.

3. If you want to save the items for use in a future session, be sure to sign into your **My Business Source** account.
Block Style Result List

If you select a Display Style of Blocks, the "block-style" Result List will display.

The Block Style Result List has two additional features - the control arrows, and the Results Map. To follow a path, use the control arrows on the left-hand side of the screen. Or, click in a new block within the Results Map to move to a different area of the Result List.

Note: Your library administrator decides whether Visual Search will be available, and which style (blocks or columns) will be the default Result List style.
Search Tools

Boolean Operators (And, Or, Not)

Boolean logic defines logical relationships between terms in a search. The Boolean search operators are **and**, **or** and **not**. You can use these operators to create a very broad or very narrow search.

- **And** combines search terms so that each search result contains all of the terms. For example, *travel and Europe* finds articles that contain both *travel* and *Europe*.
- **Or** combines search terms so that each search result contains at least one of the terms. For example, *college or university* finds results that contain either *college* or *university*.
- **Not** excludes terms so that each search result does not contain any of the terms that follow it. For example, *television not cable* finds results that contain *television* but not *cable*.

The following table illustrates the operation of Boolean terms:

<table>
<thead>
<tr>
<th>And</th>
<th>Or</th>
<th>Not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Each result contains <strong>all</strong></td>
<td>Each result contains <strong>at</strong></td>
<td>Results <strong>do not contain</strong></td>
</tr>
<tr>
<td>search terms.</td>
<td><strong>least one</strong> search term.</td>
<td>the specified terms.</td>
</tr>
<tr>
<td>The search <em>heart and lung</em></td>
<td>The search <em>heart or lung</em></td>
<td>The search <em>heart not lung</em></td>
</tr>
<tr>
<td>finds items that contain <strong>both</strong></td>
<td>finds items that contain</td>
<td>finds items that contain</td>
</tr>
<tr>
<td><em>heart and lung</em>.</td>
<td>either <em>heart</em> or items that</td>
<td><em>heart</em> but <strong>do not contain</strong></td>
</tr>
<tr>
<td></td>
<td>contain <em>lung</em>.</td>
<td><em>lung</em>.</td>
</tr>
</tbody>
</table>

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Using Stop Words

Stop words are commonly used words such as articles, pronouns and prepositions. Stop words are not added to the search dictionary, since their relevance is minimal, but they are counted as words for proximity (the distance between words). Ignoring stop words allows the program to retrieve a more precise Result List, especially for a relevancy ranked search.

The search engine ignores stop words (such as the, for, of and after), finding any single word in its place. For example, if you entered company of America, the search engine would find company of America, company in America, or company for America. It would not find company of the America, because the search engine retains a word distance.

If you enter two stop words, the search engine will find any two words in the place of the stop words. For example, if you searched for company of the America, the search engine finds any two words in the place of the stop words.

EBSCO has two primary lists of stop words, separate for Boolean and Natural Language searching. Additionally, several databases have their own list of stop words. All of these lists were created based upon The Library of Congress' suggestions on stop words, as well as our own statistical analysis.

Using Quotation Marks

Typically, when a phrase is enclosed by double quotations marks, the exact phrase is searched. This is not true of phrases containing stop words. A stop word will never be searched for in an EBSCO database, even if it is enclosed in double quotation marks. A search query with stop words only (i.e. no other terms) yields no results.

Using Punctuation

If you enter phrases with punctuation, the search engine searches for the term both with and without the punctuation. For example, if you enter television: talk show, the search engine finds results with television talk-show, television talk show, and if synonyms have been activated, TV talk show.

If you enter hyphenated words in a search, the search engine automatically searches for the word in both hyphenated and non-hyphenated forms. For example, entering coca-cola will find both Coca Cola and Coca-Cola.
Wildcard (?) and Truncation (*) Symbols

Use the wildcard and truncation symbols to create searches where there are unknown characters, multiple spellings or various endings. Neither the wildcard nor the truncation symbol can be used as the first character in a search term.

- **The wildcard** is represented by a question mark (?). To use the wildcard, enter your search terms and replace each unknown character with a ?. The search engine finds all citations of that word with the ? replaced by a letter.
  
  For example, type ne?t to find all citations containing neat, nest or next. The search engine does not find net because the wildcard replaces a single character.

- **Truncation** is represented by an asterisk (*). To use truncation, enter the root of a search term and replace the ending with an *. The search engine finds all forms of that word.
  
  For example, type comput* to find the words computer or computing.

Field Codes

You can use field codes to create a search using indexed fields referenced in either the citation or full display (or full text, if available). EBSCO uses two-character abbreviations for field codes such as SU-Subject, AU-Author or TI- Article_Title.

Field codes are database specific. For more information on which searchable fields are available for a database, on the Choose Databases Screen, click the More Information link for the database.

To create a search using a field code:

1. At the Search Screen, type one of the two-letter codes before your search terms in the text entry field. For example, to search for articles that include the subject sports injuries and the term hockey, type: SU Sports Injuries and Hockey.

2. Click Search. The Result List appears.

Proximity Searches

You can use a proximity search to search for two or more words that occur within a specified number of words (or fewer) of each other in the databases. Proximity searching is used with a keyword or Boolean search.

The proximity operators are composed of a letter (N or W) and a number (to specify the number of words). The proximity operator is placed between the words that are to be searched, as follows:

- **Near Operator (N)** - N5 finds the words if they are within five words of one another regardless of the order in which they appear.
  
  For example, type tax N5 reform to find results that would match tax reform as well as reform of income tax.

- **Within Operator (W)** - In the following example, W8 finds the words if they are within eight words of one another and in the order in which you entered them.
  
  For example, type tax W8 reform to find results that would match tax reform but would not match reform of income tax.
Limiters

Limiters let you narrow the focus of your search so that the information retrieved from the databases you search is limited according to the values you select. You can use more than one limiter if more than one is available.

Common limiters that can appear on Advanced Search include:

- **Full Text** – Click to limit results to articles with full text.
- **Cover Story** – Click to limit results to articles that were featured as cover stories.
- **Local Titles** – Click to limit results to articles available at your library.
- **Journal/Magazine** - Enter a journal/magazine name in this field to limit results to articles only from that title.
- **Peer Reviewed** - Limits search results to articles from peer-reviewed journals. Peer-reviewed journals are publications that include only those articles that have been reviewed and/or qualified by a selected panel of acknowledged experts in the field of study covered by the journal.
- **Date Published** - Use this option to search for articles within a specified date range. Create a range by using the drop-down lists to specify the months of the range and enter the last two digits of the year in the entry fields to specify the years of the range.
- **Number of Pages** - Enter a number in this field to limit results to a specific number of pages in length. Place the < (less than) or > (greater than) symbol before the number to search for articles with a specific page length range. For example: to search for articles that are greater than three pages in length, enter \( >3 \) in this field. You can also use a dash to enter a range of pages. For example, to find articles between five and ten pages long, enter \( 5 - 10 \).

Limiters do limit one another. If you select both Full Text and Cover Story limiters, the results that are retrieved include only Full Text items that are Cover Story items. The exception to this rule is the use of Full Text and Local Titles limiters. In this situation, use of these limiters produces a list of results that has Full Text or is part of a local collection. Limiters may vary by interface, database and search screen.

To create a search using a limiter:

1. In the **Find** field, enter your search terms.
2. Select the limiter you want to use from the **Limit Your Results** section of the Search Screen.
3. Click **Search**. The Result List appears.
Expanders

*Expanders* let you broaden the scope of your search. They do this by widening your search to include words related to your keywords or including the actual text of the full text results in your search.

Common expanders that may appear on Advanced Search include:

- Apply additional terms to query – expands results to include synonyms and plurals.
- Also search within the full text of the articles – expands search results by finding your term(s) within the full text of the articles.
- Automatically "And" search terms – expands results by applying the AND operator between terms, e.g., typing *space shuttle* would give results for *space* and *shuttle*.

**To create a search using an expander:**

1. On Advanced Search, enter your search terms in the *Find* field.
2. Select the expander you want to use from the *Expand results to* area of the Search Screen.
3. Click *Search*. The Result List appears.
Browse Screens

Browsing by Subject

To browse by Subject:

1. From the Advanced Search Screen, click the **Subjects** link. The Subjects Browse Screen is displayed.

   ![Subjects Browse Screen](image)

2. Enter your search terms in the **Browse for** entry field, and then select from: Term Begins With, Term Contains, or Relevancy Ranked radio buttons and click **Browse**.

3. A list of headings is displayed. In some databases, you can hover over the **Scope** link and view the entire Scope Note. Clicking on the **Scope** link positions you directly at the Scope Note area of the detail screen.

4. As you select headings, mark explode and/or major concept, and then add to your search using and, or, or not, your search is being built in the **Find** field.

5. To display a list of results that match your search terms, click **Search**.

**Term Begins With**

If you browse the Subject list and enter “finance” in the **Browse for** field and select **Term Begins With**, the list displays the terms in alphabetical order:

- FINANCE
- FINANCE charges
- FINANCE companies
- FINANCE houses Use FINANCE companies
- FINANCE, International Use INTERNATIONAL finance
- FINANCE, Local Use LOCAL finance
Term Contains
If you browse the Subject list and enter “finance” in the Browse for field and select Term Contains, the term searched for appears first followed by a list of terms displayed in alphabetical order:

FINANCE
ACCOUNTING -- Effect of inflation on
AGENCIES, Rating (Finance) Use RATING agencies (Finance)
ANTI-inflationary policies
BANK investment contracts
BANKS & banking, Foreign

Relevancy Ranked
If you browse the Subject list and enter “finance” in the Browse for field and selected Relevancy Ranked, the exact match for the term appears first followed by a list of terms displayed in order of relevance.

FINANCE
LOCAL finance
CORPORATIONS -- Finance
HOUSING -- Finance
MUNICIPAL finance
OPTIONS (Finance)

Using Explode and Major Concept

Explode
When you Explode a term, you create a search query that “explodes” the subject heading. The headings are exploded to retrieve all references indexed to that term as well as all references indexed to any narrower terms.

Major Concept
When you select Major Concept for a term, you create a search query that finds only records for which the subject heading is a major point of the article. Searches are limited with specific qualifiers (subheadings) to improve the precision of the search, and limited to major subject headings indicate the main concept of an article.

Combining Explode and Major Concept
If you select Explode and Major Concept, you retrieve all references indexed to your term (and its narrower terms) and all articles for which the subject heading is a major point of the article.
Searching for People and Places

In certain databases, People and Places appear as additional sub-tabs when you view the Thesaurus or Subject Terms list.

To browse for People or Places:
1. Click the People or Places sub-tab.

2. Enter search terms in the Browse for field and click Browse. A list of indexed terms is displayed. (You could also page through the terms using the Next | Previous links and mark the terms you want.)

3. You can mark terms and click Add. The terms are added to the Find field.

4. Click Search. A Result List is displayed.
Browsing an Index

To browse Indexes from Advanced Search:

1. From the Advanced Search Screen, click the Indexes link. The Indexes Browse Screen is displayed.

2. From the Browse an Index drop-down list, select a field. (For example, Author or Subject—the fields vary by database. You can enter a term in the Browse for text entry field or leave it empty.)

3. Click Browse. A list of index terms is displayed.

4. Build a search query by marking the terms and selecting a Boolean operator (and, or, not). Click Search. You are returned to the Keyword Search screen. A Result List is displayed.
Cited Reference Searching

Browsing Cited References

Some databases provide the ability to "browse cited references." When you run a Basic or Advanced Keyword Search, any "Cited References" or "Times Cited in this Database" links that are available are presented with your search results.

Cited References - If you click the Cited References hyperlink on a result, the Cited References sub-tab presents a list of records cited in your original article.
Related Records - If you select one or more cited references and click the Related Records button, the Related Records sub-tab presents a list of records related to your original article. These records are sorted by relevance, based on the greatest number of shared references.

![Related Records screenshot](image1)

Times Cited in this Database - If you click the Times Cited in this Database hyperlink on a result, the Citing Articles sub-tab presents a list of records that cite your original article.

![Citing Articles screenshot](image2)

Cited References and Times Cited within this Database hyperlinks are also displayed on the article detail page. Records with Cited References and Times Cited within this Database links can be saved to the folder. However, linking to Cited References or Citing Articles lists is not available from the folder.
Searching for Cited References

If a database supports “cited reference” searching as well as “cited reference” browsing, a Cited References Search Screen is also available.

Enter search terms in the author, title, source, year or all fields. The results of a cited reference search are displayed below the Cited References sub-tab. The Search fields remain available so you can edit your search terms or run a new search.

Cited References - From the Cited References Search Screen, the Cited References sub-tab presents a list of citation records for the search terms you entered.
Citing Articles - From the Cited References sub-tab, you can mark check boxes, click Find Citing Articles, and retrieve a list of Citing Articles.

Note: Support for cited reference searching varies by database.
Searching by Publication

The Publication Authority File lists the information contained in a database according to journal or magazine name.

To browse a Publication Authority File:

1. From Advanced Search, click the Publication link or any of the source-type links (Academic Journals, Magazines, etc.). The Publication Authority File (or section of the file—e.g., Newspapers) appears, with the beginning of the list displayed.

2. From the Publications tab, enter your search terms in the Browse for field. You can enter all or part of a publication name. (For example, you could enter Time.) To narrow by source type (Industry Reports, SWOT Analyses, etc.), select from the Select Type drop-down list.
3. Select a search type. Click one:
   - **Alphabetical** - Finds journals beginning with the letters you entered. Results are displayed in alphabetical order.
   - **By Title, Subject & Description** - Finds publications that carry that term in the Subject, Description or Title fields of the Publication Details.
   - Depending on the type of publication you are searching for, additional selections may be displayed. When searching within Country or Industry Reports, you may also be able to narrow by Country, Region, Industry, or All Reports.

4. Click **Browse** to view your terms as they appear in the Publication Authority File. A Result List is displayed.

5. Browse the list by using the **scroll bar** or the **arrow keys** to move up or down the current page, or by using the up or down arrows at the top and bottom of the page.

For a description of the journal or publication, click the hyperlinked **Publication Name**.

The information found in the Publication Details may include: the title, ISSN, publisher information (name, address, publisher URL), title history, bibliographic record and full text coverage, publication type, the subject and/or a description of the journal, and whether the journal is peer reviewed.

Hyperlinks to all issues are displayed in a column on the right side of the screen. If the journal displays a title history, you can switch between **All Issues** in the history or **Current Title Only** (the issues for the current title being displayed).
Marking Items for Search

You can use the *Mark Items for Search* feature to search several publications at the same time, or to combine publication names with other search terms.

**To search for several publications at the same time:**

1. With the Publication Result List displayed, mark the check boxes to the left of the publications you want to search. Click **Add**. The publications you selected are placed in the **Find** field on the Search Screen. (They are combined with "or.")

2. To search within those publications, click **Search**. To revise your search, you can add more terms in the **Find** field and click **Search**.

For example, enter *science* in the **Browse for** field and click **Browse**. You could then mark the publications *Science and Society* and *Science as Culture*, and click **Add**. Your selections would be posted in the **Find** field as:

JN "Science & Society" OR JN "Science as Culture"

You could click **Search**, and obtain results from both publications. You could also edit your search in the **Find** field, adding "and humanity" to your search. This would provide a different set of search results.

**To search within a publication:**

1. From a journal’s Publication Detail Screen, click the **Search within this publication** link.

2. The Search screen appears with the **JN** tag and the journal name entered in the **Find** field. Add any additional search terms and/or limiters and click **Search**.

3. A Result List is displayed.
Setting Up a Journal Alert

To set up a journal alert:

1. From the Advanced Search Screen, click the Publications link. To locate the publication, enter the title in the Browse Publications field and click Browse, or use the A – Z links and the left/right arrows to browse through the list of titles.

2. From the journal’s Publication Details Screen, click the Journal Alert link. If you have not signed into your personal account, you will be prompted to do so.

3. The Journal Alert Screen appears. The Journal Alert name, Date Created, Database, and Interface name are automatically filled in.

4. In the Run Alert for field, select how long the journal alert should run:
   - One month (the default)
   - Two months
   - Six months
   - One year
In the **Alert Options** area

1. Select the **Alert results format** to use: Brief, Detailed, or Bibliographic Manager formats.
2. To **limit EBSCOhost access to only the articles in the alert** (rather than the entire site), mark the check box to the left of this field.
3. **Alert on full text only** – Mark the check box to indicate that you want to set up an alert for only the full text
In the **E-Mail Properties** area

1. Indicate how you would like to be notified. Select one:
   - E-mail all alerts and notices (the default)
   - E-mail only creation notice
   - No e-mail (RSS only) – if you select this option, the remaining E-mail Properties will be hidden (because they are not necessary for RSS).

2. **E-mail Address** - to be notified by e-mail when a new issue is available, enter your e-mail address. If you are entering multiple e-mail addresses, place a semicolon between each e-mail address.

3. **Hide Addresses from recipients** – if you select this option, the e-mail addresses you enter will be placed into the BCC (Blind Copy) field of the e-mail, rather than the “To” field.

4. **Subject** - enter a brief explanation that will appear in the subject line of the Journal Alert e-mail.

5. **Title** - you can optionally enter a title for the e-mail. The default value for the Title field is: *Business Source Alert Notification*.

6. **E-mail [From] address** - defaults to *EPAlerts@EPNET.COM*. You can enter a different "From" e-mail address if desired.

7. Select the **E-mail format to use**: Plain Text or HTML.

8. Indicate whether you want to include: **Link to TOC page on BSI** or **Article links embedded within the e-mail message**.

9. **Include in e-mail** - To have your search string included with your results, mark the **Query** check box. To include the frequency (how often the alert will run), mark the **Frequency** check box.

10. When you have finished making changes, click **Save**. You will be returned to the Publication Details Screen. A message is displayed that indicates a journal alert has been set for the publication.
Setting Up a One-Step Journal Alert

If enabled by your library administrator, you may also be able to set up one-step journal alerts right from the Publications Browse Screen.

To set up a one-step journal alert:

1. Click the **Publications** link on the sub-toolbar. Once you have found the desired publication, click the **RSS alert** icon to the left of the publication name.

2. A pop-up screen displays with the journal alert information. Copy the **Syndication Feed URL** into your newsreader.

3. If you decide that e-mail delivery of the alert information is required, click the **Sign in and create a new alert** link. Once you sign in to My BSI, the Journal Alert Screen appears. You can save the alert as described earlier in “Setting Up a Journal Alert.”
Saving Searches and Alerts

Saving Searches
You can save single or multiple searches for later use.

To save searches:
1. From the Search History/Alerts Screen, click Save Searches/Alerts. The Saved Search/Alerts Screen appears.

   ![Saved Search/Alerts Screen](image)

   - **Name**: Banking Search
   - **Description**: 
   - **Date Created**: 2/13/2007
   - **Database**: Business Source Premier
   - **Interface**: bsi
   - **Save Search As**: Saved Search (Permanent)

2. If you have not already logged in to your personal account, you will be prompted to sign in. Enter your **user name** and **password**; or click **Cancel** and return to the Advanced Search Screen.

3. Enter a **Name** and **Description** for the search. (For example, mysearch1)

4. In the **Save Search As** field, select one of the following:
   - Saved Search (Permanent)
   - Saved Search (Temporary 24 hours)
   - Alert - If you selected Alert, additional fields are available. For more information, see “Saving a Search as an Alert.”

5. To save the search, click **Save**; otherwise, click **Cancel**. You are returned to the Search History/Alerts Search Screen.
You can retrieve your saved searches and alerts and edit and reuse them.

To retrieve searches:

1. From the Search History/Alerts Screen, click **Retrieve Searches**.

2. If you have not already logged into your personal account, you will be prompted to sign in. Enter your **user name** and **password**; or click **Cancel** and return to the Advanced Search Screen.

3. If you currently have search history open, you are prompted to save your current search. If you proceed without saving, the retrieved search appears and your current search is cleared. To retrieve a search from the Saved Searches List, click on the **Retrieve Saved Search** link.

4. You are returned to the Advanced Search Screen. The **Find** field now includes all information for the search you retrieved. All search counts are replaced with question marks. When you view the results (by clicking on a **Rerun** link in the Results column), a new search is launched and its results are added to the search history.

**Note:** If you retrieve a search saved on EBSCOhost into the Business Searching Interface, your results may vary. This is because the limiters may be different on either interface.
Saving a Search as an Alert
To save a search as an alert:

1. From the Advanced Search Screen, or from the Result List, click the Search History/Alerts link. (If enabled by your library administrator, Search History may also be available from Basic Search.)

2. From the Search History/Alerts Screen, click Save Searches/Alerts. The Saved Search/Alert Screen appears. If you have not already signed in to your personal account, you will be prompted to do so.

On the Save Search/Alert Screen:

1. Enter a Name and Description for the Alert.
2. To run the Alert against a different database, select the Databases from the drop-down list. (Hold down the control key and left-click your mouse to select multiple databases.)
3. Search strategy – The search terms are displayed. (not editable)

In the Save Search As area of the screen:

1. To save the search as an Alert that can be automatically run, click the Alert radio button.
2. To select how often the search will be run, from the Frequency drop-down list, select one:
   - Once a day
   - Once a week
   - Bi-weekly
   - Once a month (the default).
Save Search/Alert Screen

3. To limit which articles are searched, from the **Articles published within the last** drop-down list, select one:
   - One month
   - Two months
   - Six months
   - One year
   - No limit (the default)
4. In the Run Alert for field, select one:
   - One month
   - Two months
   - Six months
   - One year (the default)

In the Alert Options area of the screen:

1. Select the Alert results format: Brief, Detailed, or Bibliographic Manager.
2. To limit access to only the articles in alert (rather than the entire site), mark the check box to the left of this field.

In the E-mail Properties area of the screen:

1. Indicate how you would like to be notified. Select one:
   - E-mail all alerts and notices (the default)
   - E-mail only creation notice
   - No e-mail (RSS only) - if you select this option, the remaining E-mail Options will be hidden (because they are not necessary for RSS).
2. Enter your E-mail Address. If you are entering multiple e-mail addresses, place a semicolon between each e-mail address.
3. Hide addresses from recipients - if you select this option, the e-mail addresses you enter will be placed into the BCC (Blind Copy) field of the e-mail, rather than the “To” field.
4. In the Subject field, enter a brief explanation that will appear in the subject line of the Alert e-mail.
5. Title - you can optionally enter a title for the e-mail. The default value for the Title field is: Business Source Alert Notification.
6. E-mail [From] address - Defaults to: EPAalerts@EPNET.COM. You can enter a different "From" e-mail address if desired.
7. Select the E-mail format to use: Plain Text or HTML.
8. To have your search string included with your results, mark the Include query string in results check box. To include the alert frequency, mark the frequency check box.
9. When you have finished making changes, click the Save button.
Setting Up a One-Step Search Alert

If enabled by the library administrator, you may be able to set up search alerts in just one step directly from the Result List or Search History Screens.

To set up a one-step search alert:

1. From the Result List or Search History Screen, click the **RSS alert icon**, or the **Create alert for this search link**.

2. A pop-up screen displays with the search alert information. Copy the **Syndication Feed URL** into your newsreader.

3. If you decide that e-mail delivery of the alert information is required, click the **Sign in and create a new alert** link. Once you sign in to My BSI, the Search Alert Screen appears. You can save the alert as described earlier in “Saving a Search as an Alert.”
Setting Up a Personal Account

If provided by your library administrator, you can set up a personal account that can be used in all EBSCO interfaces. With a personal account, you can save search results, persistent links to searches, saved searches, search alerts, journal alerts and web pages to your personal folder.

To set up a personal account:

1. From the Sign In Screen, click the I'm a new user link.

2. The Create a New Account Screen displays with Personal Account entered in the Account Type field.

3. Fill in the fields on the Create a New Account Screen. When you have completed the fields, click Continue.

4. If all the information was accepted, a message appears that provides your user name and password. Click OK. You will be automatically signed in as a personal user. You should note the user name and password you created so you can log in at a future session.

When you set up a personal account, we ask for your name, e-mail address, a unique login name, password, and password validation. EBSCO uses this information only to identify you at log in so your searches are not viewed or used by anyone else. We do not share this information. Click on our privacy policy for more information.
If you have forgotten your *password*, you can submit your user name to retrieve your password.

**To reset your password:**

1. From the Login Screen, click *I forgot my password*. A screen appears.

2. Enter your *user name* and click *Continue*. You are prompted to answer the question you entered as a password hint.

3. Enter your new password twice.

4. Click *Continue*. You are automatically signed in as a personal user based on your new password. You should note the new password so you can sign in at a future session.

**Setting Up a Charge Back Account**

If you are a corporate user (for example, a law firm or an advertising agency) who needs to track usage on a per client basis for billing purposes, you can set up a *Charge Back Account*. In addition to having all features available in a personal account, you can also set up clients, start a timer to track usage by client, and obtain a report of the time spent. Usage information can be printed and/or e-mailed.

**To set up a charge back account:**

1. From the Sign In Screen, click the *Create a Charge Back Account* link.

2. The Create a New Account Screen displays with Charge Back Account entered in the Account Type field.

3. After you have completed the Create a New Account Screen click *Submit*. A confirmation message is displayed. Click *OK*.

4. The Set Up New Client Screen appears. Enter the charge back information for the first client and click Submit. Your charge back information is displayed.

5. You can continue entering charge back clients, or click *Cancel* and return to searching. You can add, change or delete charge back clients at any time.
To use charge back with Business Searching:

1. Sign in using a charge back account user name and password. Your list of Charge Back clients is displayed.

2. Select a client from the Charge Back List and click **Start Timer**. When you have finished searching for that client, click the **Stop Charge Back Timer** link.

3. The Charge Back Report Screen displays the client name, date, and time spent searching. You can print and/or e-mail the report.
Viewing Search Results

Viewing the Result List

Search results can be citations, full text, document summaries or abstracts, and can include links to full text.

- Each result is numbered, and the available formats for the article are displayed—HTML Full Text, PDF Full text, or Linked Full Text. Click the linked page numbers (or forward/backward arrows) to move through the Result List.
- Where a "Sort by" drop-down list is available, you can re-sort your results by author, date, relevance, etc.
- You can change your Preferences settings (from the Utility Toolbar) to specify how many results per page should be displayed, and how much detail should be displayed for each result—title only; a brief citation; or a detailed citation of the article.
- The article title is a hyperlink to the "best view" as selected by the library administrator—this could be the citation; a brief citation plus full text; a PDF file; or links to full text. To view a different format, click on any of the icons listed below the title.
- When a Result List is displayed, an Add search to folder icon appears to the right of your search string. You can add the query to the folder as a persistent link to a search.
- From a Result List, you can click the Display link to search icon that appears at the end of the search string. The search query is displayed in a shaded area below the link. Highlight the link text and copy using your browser's copy function. You can immediately paste the link into a web site, document or e-mail.
- When the Create alert for this search link displays at the end of the search string, you can create an alert right from the Result List, even if you are not signed in to My BSI.
Clustered Result List

Some databases support organizing the Result List by subjects, authors, or journals. This feature, also known as “clustering,” is helpful if you want to discover the major subject groups for your topic without having to browse multiple pages of results, or checking individual articles to see if they are relevant.

You can page through the results just as on a “regular” Result List. Or, to narrow your results, click a hyperlinked subject in the "Narrow Results by Subject" column. A new Result List, limited to the chosen subject, is displayed and a new list of subjects appears in the left-hand column.

- Clustered Results are grouped by Subject, Journal or Author (as set in EBSCOadmin).
- The first 125 results, relevancy ranked, will appear for the clusters selected in EBSCOadmin.
- The maximum number of clusters (subjects) is 9.

Note: Your Library Administrator decides whether this feature will be available.
Viewing the Full Record

Available Formats
When you click the title of an article, the "Best View" selected by your library administrator is displayed. This can be a citation, HTML full text or PDF. To view a different format, click on any of the icons displayed on the Formats line.

Citation View
When the citation view is displayed, it may also include a summary or an abstract. Your original keywords are highlighted throughout the record. If activated by your library administrator, the full text of the article may appear below the citation.

- The author and subject of the record can appear as links that let you perform a search of that particular field.
- Where a Find More Like This link appears, you can click the link to perform a search for articles with similar subject headings. A new Result List will display.
- The source may display a link or journal logo that leads to a detailed view of the source or publication. Clicking on the journal logo links you to a detailed description of the journal. Clicking Back returns you to the full record of the article.
- The source may also include a table of contents link that lets you perform a search on the same issue of the source or publication.
HTML Full Text View

When the HTML full text view is displayed, you can also return to the citation, or any PDF or linked text by clicking on the available icons. The text is displayed formatted and ready for printing. A brief citation is always included at the end of the article.

- From either the citation or full text views, you can refine your search, return to the Result List, save to the folder, and print, e-mail, or save the article.

- Where a Find More Like This link appears, you can click the link to perform a search for articles with similar subject headings. A new Result List will display.
PDF View

When the PDF view is displayed, the article opens in the Adobe Acrobat Reader. To print the article, use the print capability available from the Reader. You can also return to the citation, any full text, or linked text by clicking on the available icons. From the PDF view, you can also refine your search, return to the Result List, or e-mail the article.

Linked Full Text View

You can link to full text articles from electronic journals subscribed to through EBSCO Subscription Services and Electronic Journals Service.

When the linked full text result is displayed, you can also return to the citation, full text, or linked text by clicking on the available icons. When you click on an available hyperlink and open full text, you can refine your search, return to the Result List, and print, e-mail or save the article.
Using the Folder

To collect several articles, click the Add icon for each article. To add all items on a page to your folder, click Add (1-10) at the top of the Add column. Result numbers to be added will change as you page through the list of results.

As you add the articles to the folder, you can click the Folder icon and review which items have been added. You can then print, e-mail or save many results all at the same time. If you have signed in via My BSC or My BSP, any search results that you collect in your folder will be automatically saved at the end of the session.
Managing Custom Folders

You can create new custom folders and sub-folders, rename folders, move items to different folders, and add notes to a folder. You can create as many levels of folders and sub-folders as you like. However, only four levels of folders and sub-folders are displayed. Any folders below that will display at level four.

You must be signed in as a personal user (My BSI) to use the custom folders feature.

To create a new custom folder:

1. Click the Folder icon. My Folder is displayed.

2. Click the New link to the right of the My Custom link. The Create New Folder Screen displays.

3. In the Folder Name field, enter a name for the folder; up to 40 characters.
4. **Move Folder To** – You can select a “level” for the folder. (For example, you could create a “History” folder, and then place a “U.S. History” folder within it.)

5. In the **Notes** field, you can enter information regarding the folder; up to 200 characters.

6. Click **Save**. You are returned to the Folder area, with your named folder displayed in the left-hand column.

**To rename a folder:**

1. Click the **Folder** icon then click on the **named folder** that you want to rename.

2. In the **Folder Name** field, enter the new name for the folder; up to 40 characters.

3. Click **Save**. You are returned to the Folder area, with your renamed folder displayed in the left-hand column.

**To delete a folder:**

1. Click the **Folder** icon then click on the **folder** that you want to delete.

2. Click **Delete Folder**. A confirmation message displays.

3. Select **Yes**. The folder and its contents are permanently deleted.

**Note:** the top-level folder (My Folder) can never be deleted.

**To move a folder and its contents to different folder:**

1. From within the Folder, select the **folder** that you want to move.

2. Click the **Move To** button. Select the folder to which you want to move the items (the “target” folder). The folder and its contents are moved to the target folder.
To move items to a different folder:

1. From within the Folder, mark the check box to the left of the items that you want to move. (For example, articles, images, videos, etc.)

2. Click the Move To button. Select the folder to which you want to move the items (the “target” folder). The items will be moved to the target folder.

To copy items to a different folder:

1. From within the Folder, mark the check box to the left of the items that you want to copy. (For example, articles, images, videos, etc.)

2. Click the Copy To button. Select the folder to which you want to copy the items (the “target” folder). The items will be copied to the target folder.

To delete items from a folder:

1. From within any folder, mark the check box to the left of the items that you want to delete. (For example, articles, images, videos, etc.)

2. Click the Delete Items button. The items are automatically deleted.
Linking to Information

**SmartLinks**
You can link to full text articles from electronic journals subscribed to through EBSCO Subscription Services using the EBSCOhost Electronic Journals Service (EJS). When checking for links, SmartLinks searches all full text databases your library administrator makes available.

**SmartLinks** are present in the Result List and in the Full Record when:

- The article does *not* contain full text or a page image (PDF) but is available in full text in another EBSCOhost database.
- The article is available in an electronic journal your institution subscribes to through EJS.

To link directly to the article, click the hyperlinked article title.

**Persistent Links**
Persistent linking lets users retrieve an article by clicking on a link embedded in a web site. This feature lets professors, teachers and librarians include links to articles on their web pages.

Persistent links to articles can be e-mailed or saved. When you e-mail search results, persistent links to articles are automatically included with the e-mail. Persistent links to searches can also be added to the folder and e-mailed or saved.

Only authorized users can access the articles. A user who cannot be authenticated is prompted with an error message indicating that he does not have the proper access rights for the article.

The library administrator activates persistent linking through EBSCOadmin.

**CustomLinks**
If your library supports an online public access catalog, your library administrator can make links to it available on the full record display next to the "View Links" heading.

The text of the link varies, but generally reads "Check library catalog for this item." Clicking this link takes you to your library holdings catalog page (often in a new browser window).

From this page you can see if the journal is available in your library. Depending on the features available in your library catalog, you may be able to request the item through interlibrary loan.

If made available by your library administrator, you may also be able to link to: document delivery services, book services, search engines, and other linking servers.
Printing/E-mailing/Saving/Exporting

Printing Your Results

To print one or more articles or citations:

1. From the open result or from the folder, click **Print**. The Print Manager appears.

2. If you are in the folder, **Remove these items from folder after printing** appears. Indicate whether you want to empty the folder of all items after printing.

3. **Include when printing** - If you do not make any selections in this area, the defaults will apply. The Detailed Citation and Abstract (plus any available HTML Full Text) will be printed. (Most users will not need to use the "Customized Field Format" selections.)

4. **HTML Full Text** (when available) – Indicate whether the HTML Full Text of the article (if available) should be included.

5. **Current Search History** (when available) – Indicate whether the current search history should be printed with your Result List Items. **(Note:** It is possible that the current search history and the Result List Items may not match. If your folder contains items from a previous session, or if you've edited or cleared search history without clearing your folder, you may receive both current search history and earlier folder results.)
6. **Standard Field Format** - Most users will choose the default - "Detailed Citation and Abstract." You can also select from the drop-down list:
   - Brief Citation – Indicates that only a brief citation should be printed.
   - Brief Citation and Abstract – Indicates that a brief citation and an abstract should be printed.
   - Detailed Citation and Abstract – A detailed citation and an abstract should be printed.

7. **Citation Format** - If you would like to print your citations in a specific format, select one from the drop-down list:
   - AMA - American Medical Association
   - APA - American Psychological Association
   - Chicago/Turabian Author - Date
   - Chicago/Turabian Humanities
   - MLA - Modern Language Association
   - Vancouver/ICMJE

8. **Customized Field Format** - If you want to select which fields are included with your results, see Custom Fields for Print/E-mail/Save.

9. Click **Print**. The articles or citations are displayed in your browser window. Click the **Print** icon on the browser toolbar.

10. To return to the article or citation, click **Back**. If you selected more items than allowed by the library administrator, any remaining items will still be available in the folder, even if you marked **Remove these items from folder after printing**.

**Note:** If your library administrator has provided the ability to translate an article, you must print the translated article directly from your browser window.

**To print PDF Full Text:**

If you are printing an item that includes PDF Full Text, the PDF does not automatically format for printing from your browser window. You must open the PDF in Adobe Acrobat Reader, and use the Reader's print capability.

If the item includes a citation and/or HTML Full Text, they will print from the browser window, but you will still need to open the PDF in Adobe Acrobat Reader, and use the Reader's print capability.

**To print Linked Full Text:**

If you are printing an item that includes Linked Full Text, you must follow the links directly to the Full Text and then print.

If the item includes a citation and/or HTML Full Text, they will print from the browser window, but you will still need to follow the links directly to the Full Text and then print.
Saving Your Results to a File

To save one or more articles or citations:

1. From an open result or from the folder, click **Save to Disk**. The Save Manager appears.

   - **Back**
   - **Articles**

   - **Number of items to be saved:** 3
     - **Remove these items from folder after saving**

   - **Save Manager**

   - **Include when saving:**
     - ✔ HTML link(s) to article(s)
     - ✔ Current Search History

   - **Standard Field Format**
     - Detailed Citation and Abstract
     - Citation Format
       - AMA (American Medical Assoc.)
     - Customized Field Format

   - **For information on saving full text, see online help. For information on using Citation Formats, see online citation help.**

2. If you are in the folder, **Remove these items from folder after saving** appears. Indicate whether you want to empty the folder of all items after saving.

3. **Include when saving** - If you do not make any selections in this area, the defaults will apply. The Detailed Citation and Abstract (plus any available HTML Full Text and HTML links to articles) will be saved.

4. **HTML Full Text** – Indicate whether the HTML Full Text of the article (if available) should be included.

5. **HTML links to articles** – Indicate whether HTML links to the articles you have selected should be included. (To save only the persistent links to the articles, clear the Additional citation details and abstract and the HTML Full Text check boxes and be sure to mark the HTML links to articles check box.)

6. **Current Search History** (when available) – Indicate whether the current search history should be saved with your Result List Items. **(Note:** It is possible that the current search history and the Result List Items may not match. If your folder contains items from a previous session, or if you’ve edited or cleared search history without clearing your folder, you may receive both current search history and earlier folder results.)
7. **Standard Field Format** - Most users will choose the default - "Detailed Citation and Abstract." You can also select from the drop-down list:
   - Brief Citation – Indicates that only a brief citation should be saved.
   - Brief Citation and Abstract – Indicates that a brief citation and an abstract should be saved.
   - Detailed Citation and Abstract – Indicates that a detailed citation and an abstract should be saved.

8. **Citation Format** - If you would like to save your citations in a specific format, select one from the drop-down list:
   - AMA - American Medical Association
   - APA - American Psychological Association
   - Chicago/Turabian Author - Date
   - Chicago/Turabian Humanities
   - MLA - Modern Language Association
   - Vancouver/ICMJE

9. **Customized Field Format** - If you want to select which fields are included with your results, see "Custom Fields for Print/E-mail/Save."

10. To save the results, click **Save**; otherwise, click **Back**.

11. From your browser menu, click **File>Save As**. Enter the path where the file should be saved (for example, C:\Project\ResearchInfo). To save to a floppy disk, enter the path to the floppy drive (for example, A:\ResearchInfo). Be sure to save as an HTML or text file.

12. Click **Save**. To return to the open article or to the folder, click **Back**.

**To save PDF Full Text:**
If you are saving an item that includes PDF Full Text, the PDF does not automatically save from your browser window. You must open the PDF in Adobe Acrobat Reader, and use the Reader’s save capability.

If the item includes a citation and/or HTML Full Text, they will save from the browser window, but you will still need to open the PDF in Adobe Acrobat Reader, and use the Reader’s save capability.

**To save Linked Full Text:**
If you are saving an item that includes Linked Full Text, you must follow the links directly to the Full Text, and then save it.

If the item includes a citation and/or HTML Full Text, they will save from the browser window, but you will still need to follow the links directly to the Full Text, and then save it.
To copy a persistent link to a search:
1. From a Result List, click the **Display link to search** icon at the end of the search query displayed above the **Find** field.
2. The search query is displayed in a shaded area below the link. Highlight the link text and copy using your browser’s copy function. You can immediately paste the link into a web site, document or e-mail.

To save persistent links to searches to the folder:
1. From a Result List, click the **Add search to folder** icon at the end of the search query displayed above the **Find** field. The search query is now saved in the folder as a persistent link to a search.
2. From the persistent links to searches area of the folder, click **Save to Disk**. The Save Manager appears. A Links to Searches sub-tab is displayed.
3. If you are in the folder, **Remove these items from folder after saving** appears. Indicate whether you want to empty the folder of all items after saving.
4. Click **Save**; otherwise, click **Back**.
5. From your browser menu, click **File>Save As**. Enter the path where the file should be saved (for example, C:\Project\ResearchInfo). To save to a floppy disk, enter the path to the floppy drive (for example, A:\ResearchInfo). Be sure to save as an HTML or text file.

**Note:** The library administrator decides whether the persistent links feature is available.
E-mailing Your Results

To e-mail one or more articles or citations:

1. From the open result or from the folder, click E-mail. The E-mail Manager appears.

2. Enter the E-mail Address. To send to more than one e-mail address, use a semicolon between each e-mail address. (For example, name1@address.com; name2@address2.com).

3. Enter a Subject to appear on the e-mail subject line. (For example, Results of research on topic ABC.) (40-character maximum.)

4. Enter any Comments you would like to include with your e-mail.

5. Format – Select whether you want to send the e-mail in Rich Text or Plain Text format.

6. If you are in the folder, Remove these items from folder after e-mailing appears. Indicate whether you want to empty the folder of all saved items after e-mailing.

7. Include when sending - If you do not make any selections in this area, the defaults will apply. The Detailed Citation and Abstract (plus any available HTML Full Text and PDF Full Text) will be sent. (Most users will not need to user the "Customized Field Format" selection.) Persistent links to articles are automatically included in the e-mail.

8. HTML Full Text (when available) – Include the HTML Full Text of the article, if available.

9. PDF as a separate attachment (when available) – Include all citation information and the article in Adobe PDF format, if available.
10. **Current Search History** (when available) – Indicate whether the current search history should be e-mailed with your Result List Items. The history will be delivered as a separate HTML attachment. **(Note:** It is possible that the current search history and the Result List Items may not match. If your folder contains items from a previous session, or if you've edited or cleared search history without clearing your folder, you may receive both current search history and earlier folder results.)

11. **Standard Field Format** – Most users will choose the default - "Detailed Citation and Abstract." You can also select from the drop-down list:

12. **Citation Format** - If you would like to e-mail your citations in a specific format, select one from the drop-down list:
   - AMA - American Medical Association
   - APA - American Psychological Association
   - Chicago/Turabian Author - Date
   - Chicago/Turabian Humanities
   - MLA - Modern Language Association
   - Vancouver/ICMJE

13. **Customized Field Format** – If you want to select which fields are included with your results, see "Custom Fields for Print/E-mail/Save."

14. To send the e-mail, click **Send**; otherwise, click **Back**. A message appears when your e-mail has been sent. If you selected more items than allowed by the library administrator, any remaining items will still be available in the folder, even if you marked Remove these items from folder after e-mailing.

**To e-mail Linked Full Text:**
If you are e-mailing an item that includes Linked Full Text, you must follow the links directly to the Full Text and then e-mail it. Otherwise, only the citation and any available HTML Full Text will be sent. If you follow the links to the Full Text and it is PDF format, the PDF will be sent as an attachment to the e-mail.

**To e-mail persistent links to searches:**
1. From a Result List, click the **Add search to folder icon** at the end of the search query displayed above the **Find** field. The search query is now saved in the folder as a persistent link to a search.
2. From the Persistent Links to Searches area of the folder, click **E-mail**. The E-mail Manager appears. A Links to Searches sub-tab is displayed.
3. Enter the **E-mail Address**. To send to more than one e-mail address, use a semicolon between each e-mail address. (For example, name1@address.com; name2@address2.com.)
4. Enter a **Subject** to appear on the e-mail subject line. (For example, *Results of research on topic ABC.*) (40-character maximum.)

5. Enter any **Comments** you would like to include with your e-mail.

6. If you are in the folder, **Remove these items from folder after e-mailing** appears. Indicate whether you want to empty the folder of all items after e-mailing.

7. Click **Send**; otherwise, click **Back**.

8. A message appears when your e-mail has been sent. If you selected more items than allowed by the library administrator, any remaining items will still be available in the folder, even if you marked **Remove these items from folder after e-mailing**.

**Note:** The library administrator decides whether the persistent links feature is available.
Custom Fields for Print/E-mail/Save

Most users will want to include the Standard Fields for the database being searched when printing, e-mailing or saving search results. If you would like to select the fields to be included within your print, e-mail or save output, you can make these selections in the Customized Field Format area of the Print/E-mail/Save Managers.

To customize which fields are included with print/e-mail/save:

1. From the Print, E-mail or Save Manager, select Customized Field Format and click the Select Fields button.

2. On the Select Fields for Output area of the screen, mark the check boxes to the left of the fields you want to include. The fields shared by all the databases you are searching appear in the Fields in Common area at the top of the screen. The individual databases are displayed in alphabetical order, with a maximum of five databases per page. You can use the page numbers or navigation arrows to view additional lists of database fields.
3. Click **Continue**, or click **Cancel** to discard your changes. Your selections will be retained throughout the session for all print, e-mail, or save activity. If you want your selections retained for a future session, be sure to sign in as a personal user.

4. Continue printing, e-mailing or saving your search results.

**Notes:**

- The Customized Field selections do not apply to output using the Bibliographic Manager.
- If you use the Customized Field Format option, the estimated number of pages to be printed, e-mailed or saved is not available.
Exporting Your Results

From the Export Manager, you can save or e-mail citations in a format compatible with your bibliographic management software. Your library administrator decides whether the Export feature is displayed.

To save citations in bibliographic manager format:

1. From the open result or from the folder, click Export. The Export Manager appears.

2. If you are in the folder, Remove these items from folder after saving appears. Indicate whether you want to empty the folder of all items after saving.

3. Save citations to a file formatted for - select one of the following:
   - **Direct Export to RefWorks** - exports citations directly to RefWorks web-based bibliographic management software. (Your library must have a subscription to RefWorks to use this option. You must also set your browser to accept pop-ups.)
   - **Direct Export to EndNote, ProCite, or Reference Manager** - includes those fields supported by ISI's Direct Export technology. (This would be useful if you are at a remote location and have bibliographic management software such as ProCite® or EndNote® on your home or office computer. You could save your citations at a school or public library and import them into your citation library at home.)
   - **Generic bibliographic management software** - includes all fields available with a citation.
   - **Citations in BibTeX format** – includes citation fields in BibTeX format.
   - **Citations in MARC21 format** - includes citation fields in MARC format.
4. To save the results, click **Save**.

- If you saved your citations in a format that can be uploaded to bibliographic management software, the articles and citations are displayed in your browser window. Save from your browser window. Be sure to enter the path where the file should be saved (for example, C:\Project\ResearchInfo). To save to a floppy disk, enter the path to the floppy drive (for example, A:\ResearchInfo). Be sure to save as an HTML or text file. Click **Save**.

- If you saved in Direct Export format and bibliographic management software (such as ProCite® or EndNote®) is installed on your computer, that software should automatically open. You should be able to indicate whether to add the citations in the export.txt file to a new or existing citation library.

**Notes:**

- For more information, you should review the bibliographic software documentation.
- Some browser versions include a pop-up blocking feature. If you are using RefWorks, you should enable your browser to allow pop-ups from epnet.com servers.

**To e-mail citations in bibliographic manager format:**

1. From the open article or citation, or from the folder list, click **Export**. The Export Manager appears.

   ![Export Manager](image)

2. Enter the **E-mail Address**. To send to more than one e-mail address, use a semicolon between each e-mail address. (For example, name1@address.com; name2@address2.com).

3. Enter a **Subject** to appear on the e-mail subject line. (For example, Citations for topic ABC.) (40 character maximum.)

4. Enter any **Comments** you would like to include with your e-mail.

5. If you are in the folder, the **Remove these items from folder after e-mailing** option is displayed. Indicate whether you want to empty the folder of all saved items after exporting.
6. **E-mail a file with citations in** - select one of the following:
   - **EndNote, ProCite, or Reference Manager format** - includes those fields supported by ISI's Direct Export technology. (This would be useful if you are at a remote location and have bibliographic management software such as ProCite® or EndNote® on your home or office computer. You could e-mail yourself citations at a school or public library and import them into your citation library at home.)
   - **Generic bibliographic management software format** - includes all fields available with a citation.
   - **Citations in BibTeX format** – includes citation fields in BibTeX format.
   - **Citations in MARC format** - includes citation fields in MARC21 format.

   **Note:** Persistent links to the records are automatically included in the e-mail and the export file.

7. To e-mail the results, click **Send**.

**Notes:**

- For more information on exporting files to bibliographic management software, you should review that product's documentation.
- The Export Manager does not support the Customized Fields feature.