# Table of Contents

Animal Health Libraries Librarians & Librarianship Bibliography

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# *refbase* Help

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## Main Menu

### Home

The main menu (3.1) is located just below the database title and includes hyperlinks to:

- Home (this page)
- Show All (the page that displays all the records in groups)
- Simple Search (only includes some of the most common fields for search criteria)
- Advanced Search (includes many fields and lots of options to filter and display data)

The database information, including recent changes, will be displayed initially (3.2). The data in this section is dynamic and will change as records are added, edited, and published by the owner of the database. Scanning this page at each login is recommended.

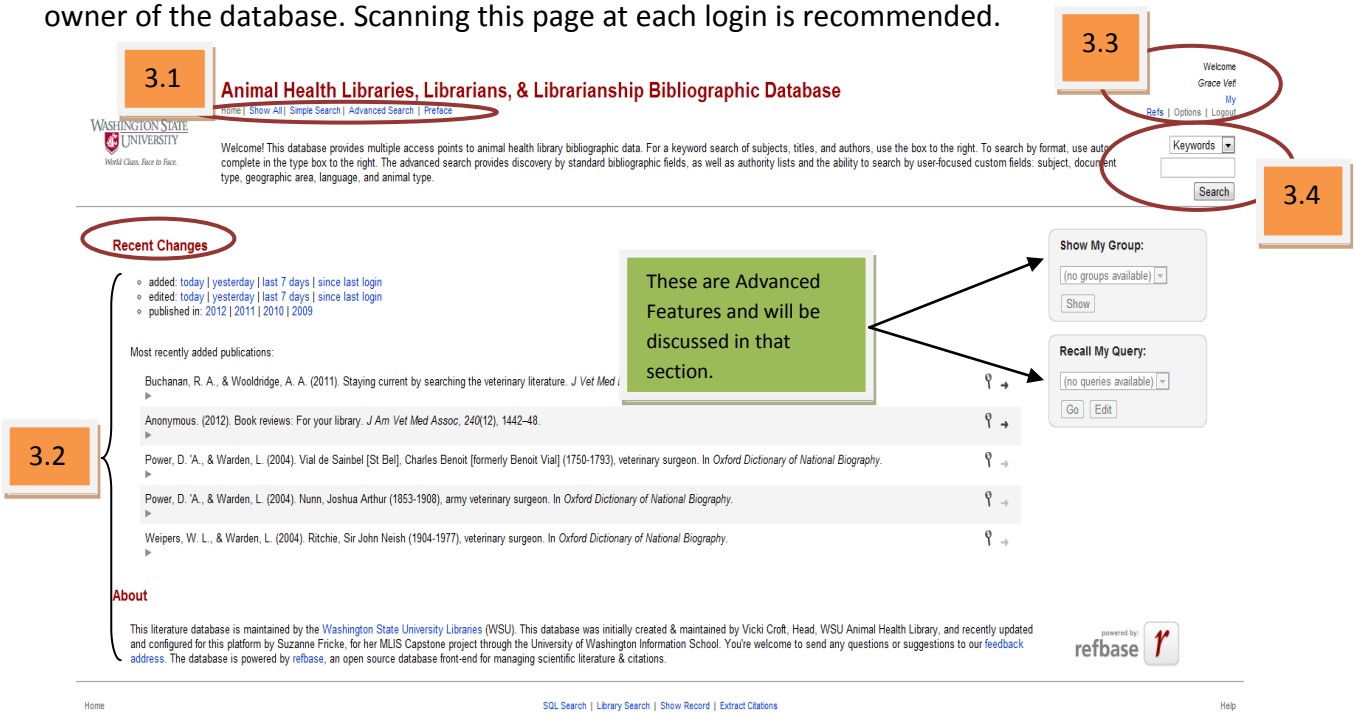


**Figure 1 (Home Page)**

The personalized information is displayed in the upper right corner of the home page. It displays “Welcome, <user name>” – along with the specific options that are available (3.3).

The Keyword search (aka Quick Search) feature (3.4) affords the user a simple search function of just one field. You can either select the field from the drop down menu or let refbase search all of the main fields (listed in the drop down menu), type the search criteria in the blank search box, and click **SEARCH** – fast and easy! All query results pages are built in the same manner. They will be discussed later in the Data section of this document. Also, see the Customizing Quick Search section to learn how to customize this feature.

## Show All

This feature lists all of the citations that are a part of the current bibliographic database in groups of 20 (default number) but this number can vary. The list is sorted by the column with the arrow (4.1 & 5.1) - up or down designating ascending or descending order. Any column listed here can be used to sort this data simply by clicking on the column heading (4.2).

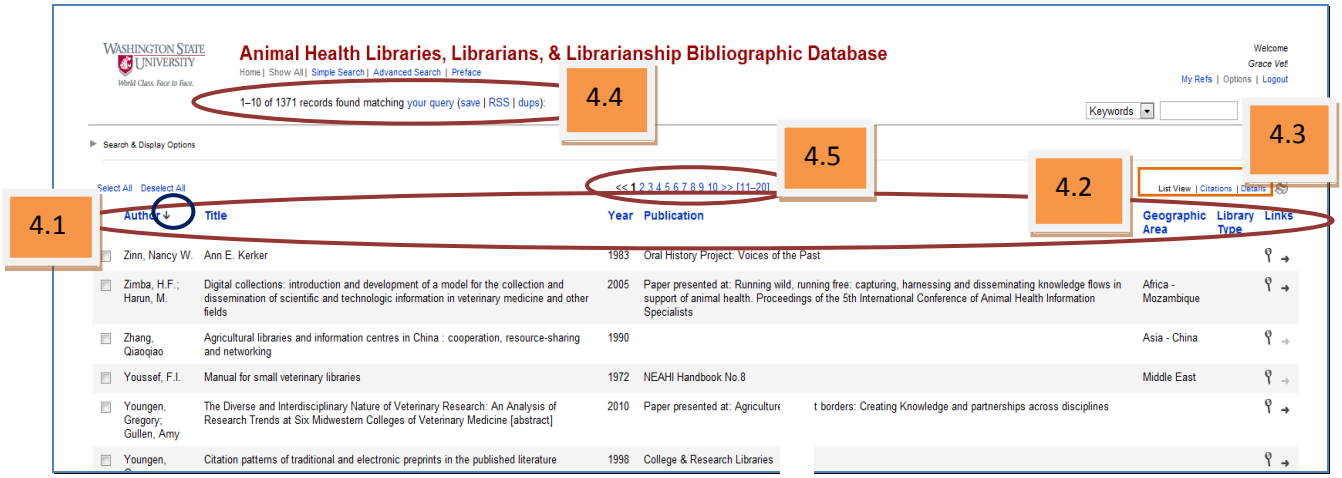


**Figure 2 (List View)**

If the exact sort cannot be accomplished because the column heading is not displayed on the Show All results page, try using the Simple Search or the Advanced Search functions. The Search & Display Options link is used to add a field to the current view. However, this technique will not change anything for future searches.

When records are displayed there is the option of using the List view (example, Figure 4), Citations view, or Details view (example, Figure 5) – in addition, the “magnifying glass” view displays the entire, individual record (only one). The List and Details views are the only views that can sort by column headings. The Details view shows **all** field names and can be sorted by

any field. The Details view has the same look as the “magnifying glass” view except ALL of the records that were in the original query remain together in the Details view instead of displaying only one individual record.

Between the top of the page and the actual query results are two useful pieces of information. The number of records out of the total records is displayed (4.4 and 5.3). All records from the query results in the Details view are kept together. Each page of results contains multiple records sorted appropriately (example 5.1; arrow indicates column and descending/ascending scope). This also includes a hyperlink to view **your query** (only if you are allowed to use SQL Search and are logged in) as well as links to **save** the current query or to run a query to identify **dup**licate records.

A bit further down the page (4.5 and 5.4) is the number of pages (1 - ??) that hold the results of the current query. By clicking on the page number, *refbase* will move directly to that page.

## Links

In the Details view, there is a heading titled “Links” (5.5). If a website (WWW) or record details via OpenURL (XREF) are available, a link will appear in this column. If the user has edit rights, a pencil will also be shown under this column to allow for editing of the record details.


**Figure 3 (Details View)**

## Simple Search

The Simple Search screen (Figure 6) contains 7 main fields that can be used to search; however, each field contains several operations (6.1). These are: contains, does not contain, is equal to, is

not equal to, starts with, and ends with. If the field is numeric (year), additional operators are available: greater than, less than, within the range, and in a list. With these operators just about any information can be found from these six fields. The "Show" column (6.2) allows control whether that field is displayed on the results page or not.

There are up to three fields (from the main seven) that can be sorted in ascending or descending (6.3) order. Once this form is completed, click the **SEARCH** button to see the query results.

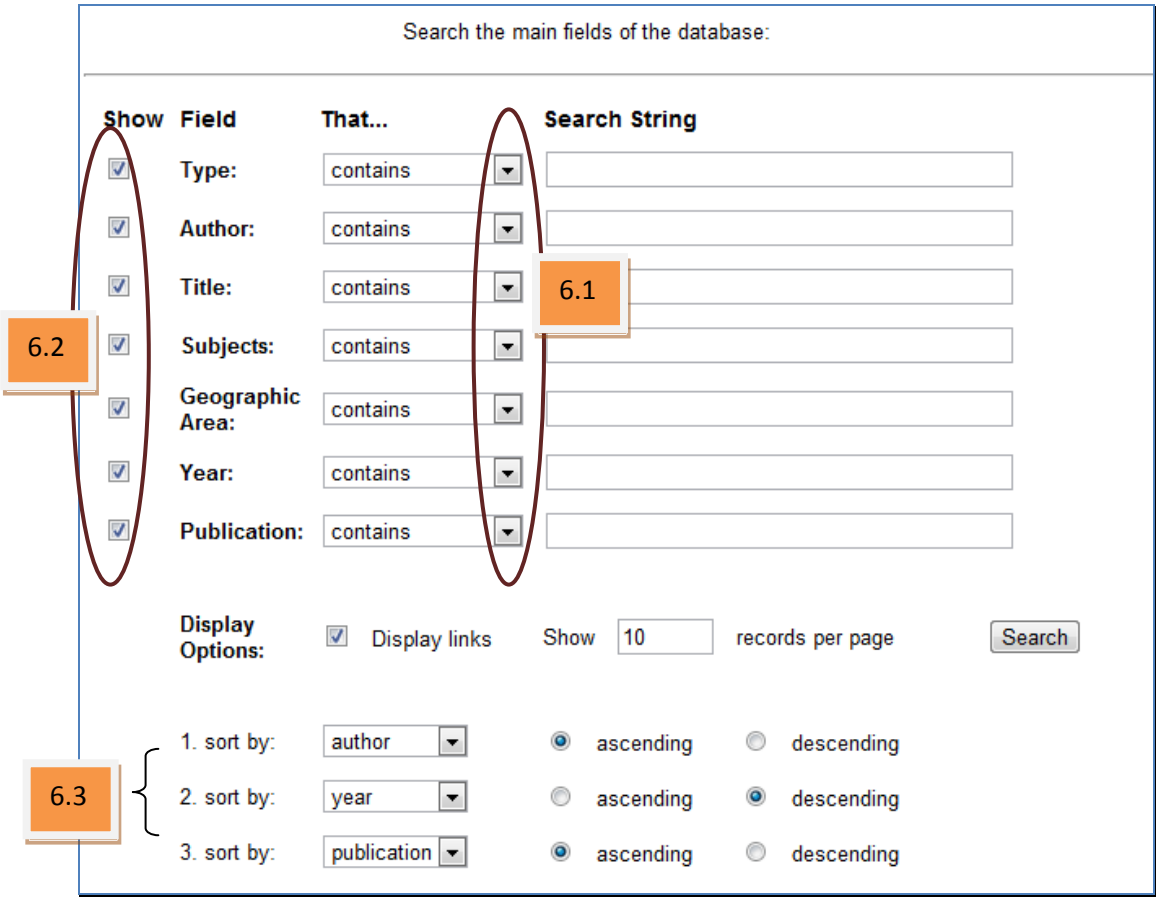


**Figure 4 (Simple Search)**

Begin typing a word or part of a word in the Search String field and a list of possible results for that main field are listed. This is taken directly from the database. For instance, if **smith** is typed in the search string for the Author, a list of authors with "smith" in the name are included in the list including "smithy" and "silversmith". If one specific author is sought, this can be a very helpful feature, especially if the correct spelling of the name is not known.

## Advanced Search

This feature is complex but not complicated. Most of the data fields - not just the main fields - are available in this search. That is the biggest difference between the Simple and the Advanced Searches.

To use, click Advanced Search from any *refbase* page (Figure 7). It is set up identically to the Simply Search, including the Display Options section and the sort functions at the bottom of the page. One minor difference is that the Search String fields work a bit differently than in the Simple Search. In the Simple Search, by beginning to type a word, *refbase* will give you a list of possible matches. That does not happen in Advanced Search. In the Advanced Search search string, a down arrow is displayed to the far right on the field. Click on the down arrow to obtain a list of possible matches. This list is taken directly from the database, just as it is for Simple Search.

Before searching, it is recommended that you write out (yes, with paper & pencil) exactly what data you want to pull from the database – what are the results you wish to get. If you want to see all citations related to wolves, you might want to search by **Keyword contains wolf** (no need to actually display the Keyword field in the results, so leave Show unchecked next to the Keyword field) and click Search. Now, if you get a zillion citations and wish to scale it down a bit more, you can use the **Search within Results** feature. This is an *advanced feature* and will be discussed in the **Advanced Features** section. (NOTE to self: Explain how and/or works so they can rationalize process).

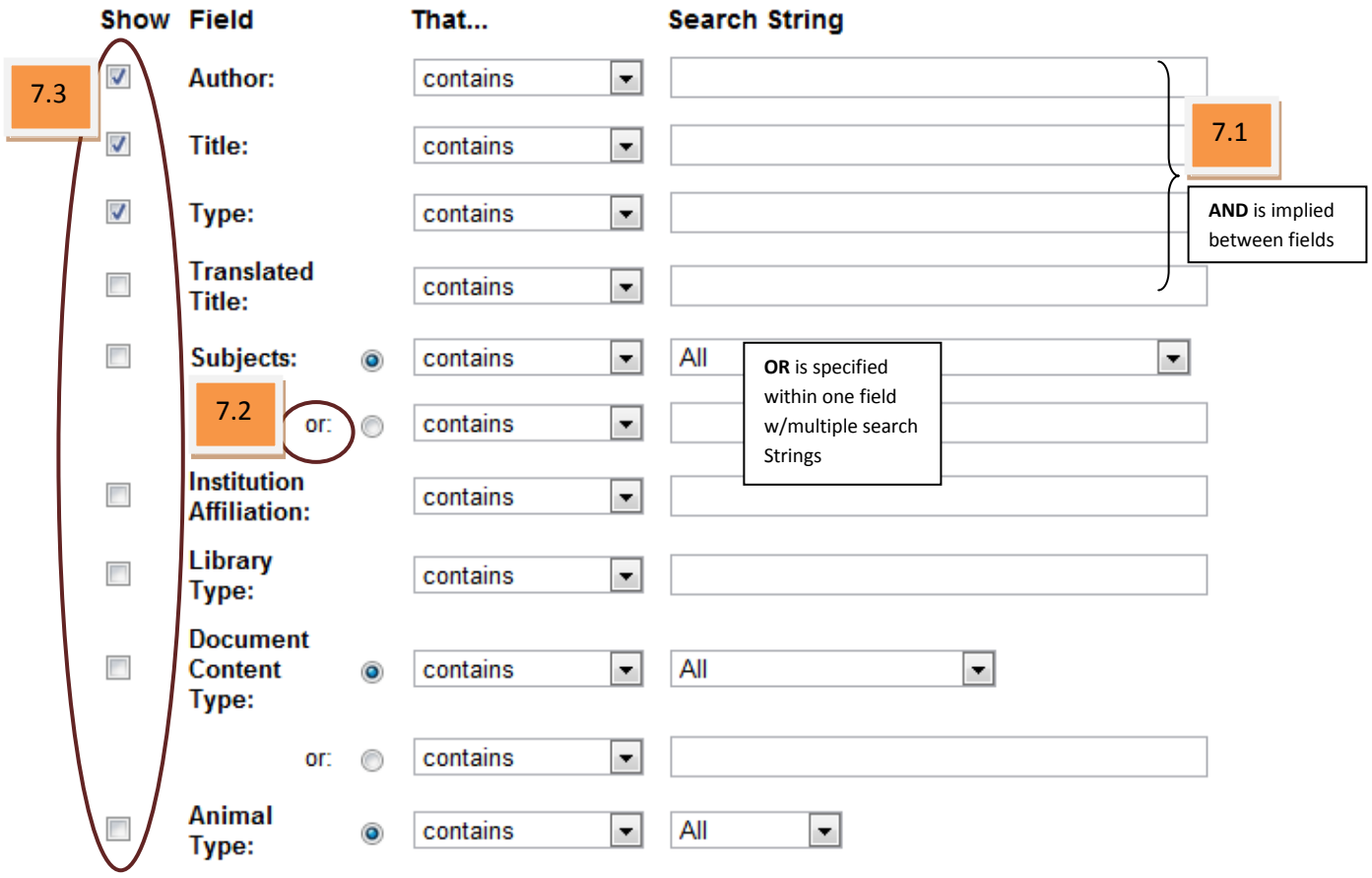


**Figure 5 (Advanced Search)**

The snippet above (Figure 7) is a small portion of the fields available to search from. The ones that use OR with the search are marked, otherwise, if multiple fields are used, the AND

operator is assumed. This screen may appear differently depending on which refbase database you are using. Most have been customized so consult the database for the actual field names.

## Data

### Results

For this example, I used the Advanced Search and left everything at the defaults, except I added "Year – within range – 2000-2007". I also changed how the results are sorted (Figure 8).

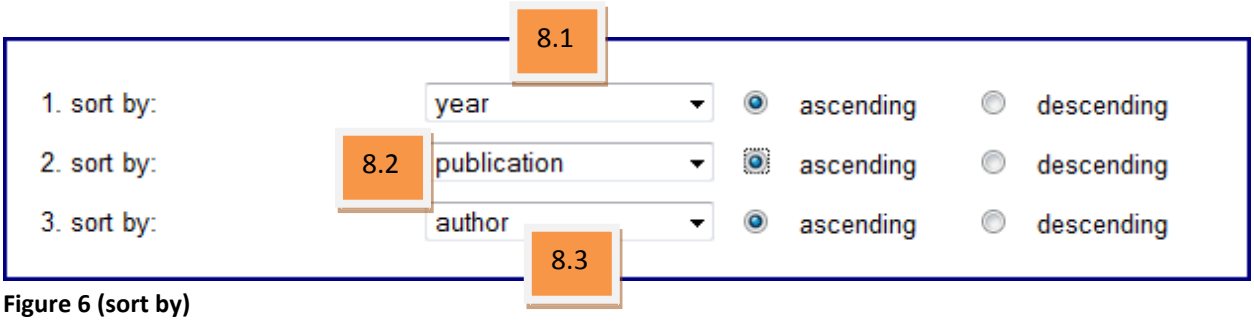


**Figure 6 (sort by)**

The results are displayed (in List View) in Figure 9. Page 9 of the results is used in this example.

1. The primary sort (8.1) is the Year field (9.1). Note the up arrow beneath the Year column header that shows it is the primary sort.
2. The secondary sort (8.2) is in the Publication/Proceeding field (9.2)
3. The tertiary sort (8.3) is the author field (9.3).

Note that the first three records shows the same year, the same publication, so the deciding sort is in the author field.

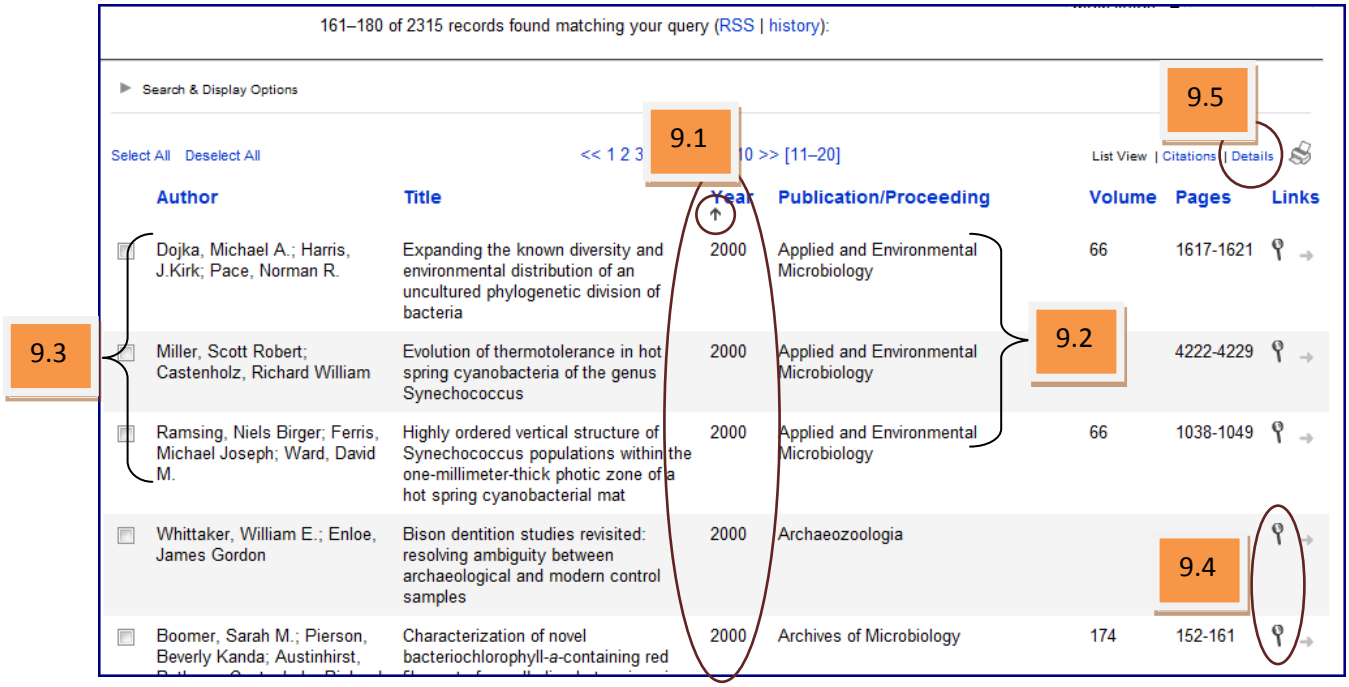


**Figure 7 (results)**

If the magnifying glass (9.4) is selected, the details of **that record only** will be displayed **–** there will be no option of viewing the next or previous records in this view. However, if Details (9.5) is selected instead from the results screen, the same **details of the record** will be displayed; but the user now has the ability to see each of the records (see snippet in Figure 10). Page down <PgDn> or page up <PgUp> or use the scroll bar on the right side to view all of the records on this page.

## Permanent Link

At the bottom of each record is a hyperlink labeled “Permanent link to this record” that can be used to link to **this exact record in this database**. Right-click on the hyperlink and select **copy link location** (this is from Firefox - menu options may vary) from the menu. The URL is now copied into the clipboard; paste it (<Ctrl-V>) into any document or RSS reader (i.e., Google Reader) – see Advanced Features section.


**Figure 8 (Details view from results)**

## Save Results and/or Add to a Group

It does not matter which view is displayed, the manner that a user selects individual records to include in a file or group is identical. The following must be done on each individual page before proceeding to the next page of the results.

1. *To select a record*, put a checkmark (10.1) in the box in the left margin to select (**or** use the Select All/Deselect All at the top of page [10.2]).

2. Scroll to the bottom of the page (Figure 11) to access the save features.

3. *To create a file* containing the designated results on the current page, select your records and then select the format of the file (11.1). Click **CITE** button and follow the onscreen prompts.

4. *To add the selected records into a group*, select individual records (10.1) and select Selected Records (11.2) **OR** use the All Found Records choice (11.2) to add all records on the results page to the group.

5. *To create a new group*, select New: and type in the name of the group, click Add (11.3). **NOTE**: At least one record must be selected in order to create a new group.

6. The entire group can be *exported* into one file in the format required.

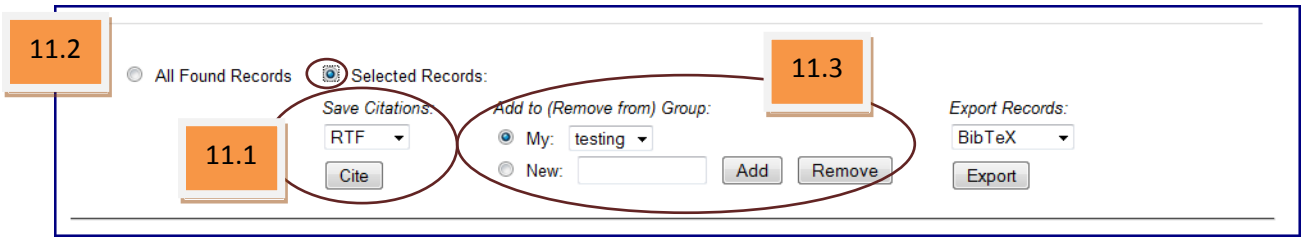


**Figure 9 (bottom of results page)**

NOTE: To *delete a group*, select the New radio button, type the name of the group to delete in the blank field, and click **REMOVE** button OR select group in "My <group>" and click **REMOVE** button..

7. Continue in this manner though the multi-page results. This MUST be done on each page.

8. Once all the required records are added to the group, go to the **Save Citations:**, choose the appropriate format, and click the **CITE** button. A prompt to save or open the file is displayed. Select **SAVE** and choose an appropriate location on the local computer to save the file. The information is now available in the chosen format.

## Export Records

Exporting bibliographic records in a variety of formats such as BibTeX, EndNote, RIS, ISI, and XML (various) is also available.

1. Follow the instructions above to put the required records into a group.

2. After all records are in the group, select the proper format under Export Records:

3. Click the **EXPORT** button.

4. They will be saved in the chosen file format to the chosen location of on the local computer.

## Exporting vs. Saving

Use the export feature to compile a file that will either be imported into an existing bibliographic database OR to create a new bibliographic database using a bibliographic manager (i.e., RefManager, *refbase*).

The save feature is most commonly used to create a listing of citations that can then be used to write a paper or article and have the information to create the references list or footnotes.

# Advanced Features

## Save Query/Search

After the search results are displayed, there are three new hyperlinks to the right of the # of records line (12.1). The options are (save | dups | history). Click the **save** hyperlink to retain the current query/search.

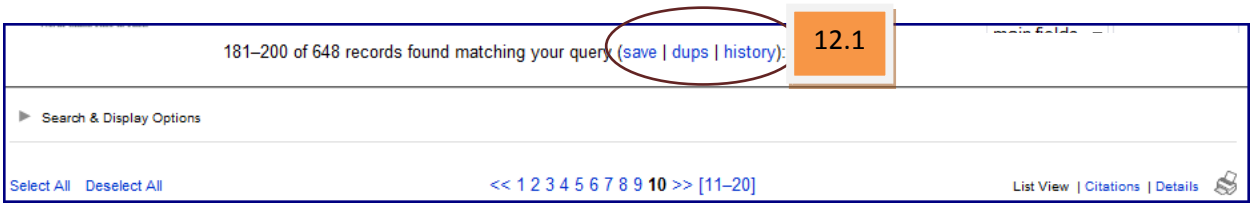


**Figure 10**

A new screen is displayed (Figure 13). Complete the Query Name field (13.1) and click Add Query (13.2). The query/search criteria can be preserved so the specific results can be obtained as often as needed. This option is only available to those who have logged into the *refbase* database.

Changes can be made to the SQL Query (13.3) area of this page only if the user is familiar with mySQL (or SQL). If not, it is advisable to leave that particular area alone.

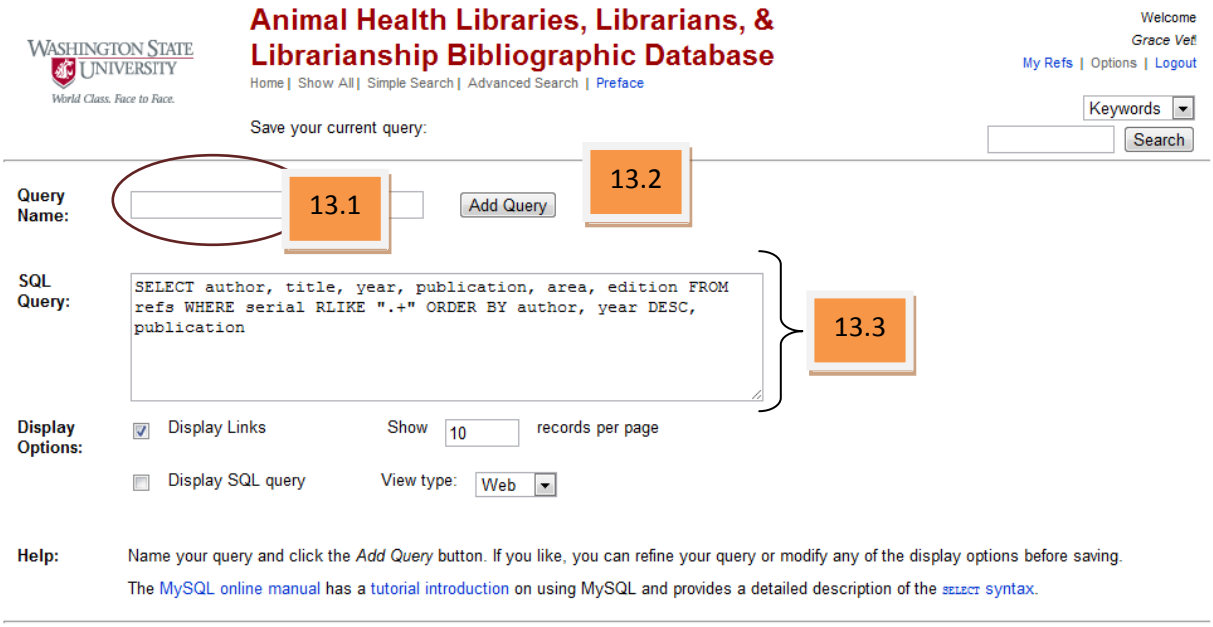


**Figure 11 (mySQL save)**

IF the query has been saved, it can be accessed any time from the user's "Home" page (Figure 14). Select the appropriate query under Recall My Query: (14.1) and click Go. The query is performed on the current dataset. Editing the saved queries is also allowed.

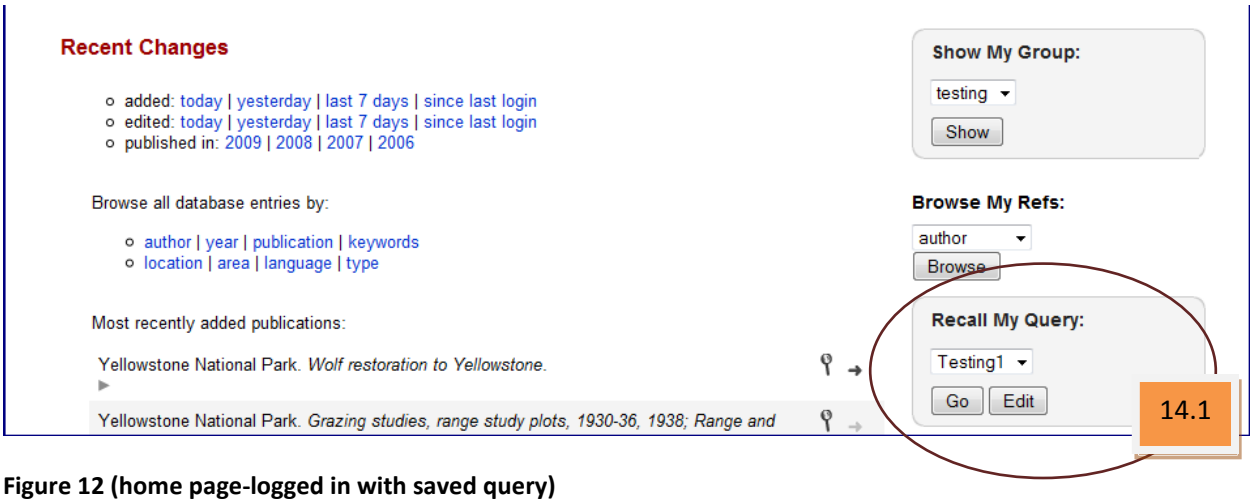


**Figure 12 (home page-logged in with saved query)**

## Search within Results

To illustrate how this feature is used, the following example will be used:

Wanted results: Anything written in 2001 on wolf behavior.

1. Login to *refbase* database.
2. Select Advanced Search from "home" page.
3. Select Year contains 2001 AND Keyword contains wolf – Search.
4. Appropriate records are displayed in the default view.

From these results, all records dealing with wolf behavior only are required.

5. Select Search & Display Optins (15.1).
6. Select "keywords" from drop down menu (16.1).
7. In the blank field below "keywords", type behavior and click Search (16.3).

The initial search results in 30 records but by narrowing the scope of the 2001 records with wolf contained in the keyword field to include only those with behavior also contained in the keywords field, the total records have been brought down to only 2 records.

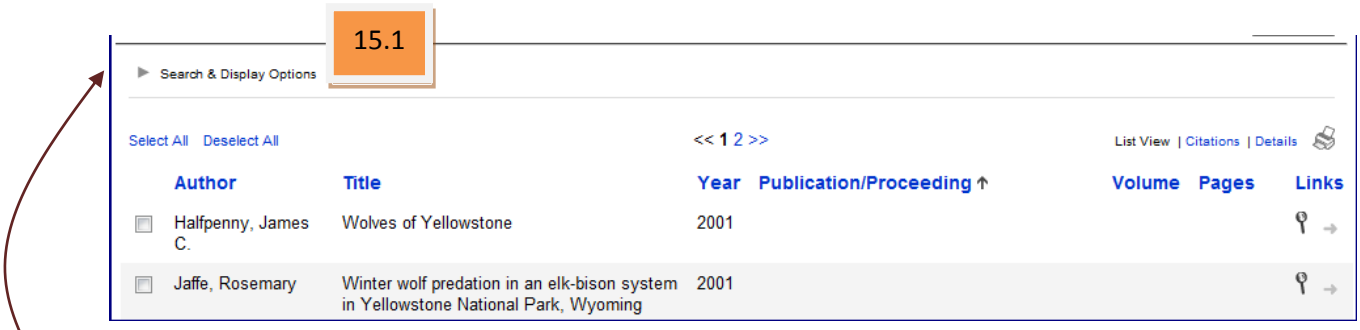


**Figure 13 (Results of first search)**

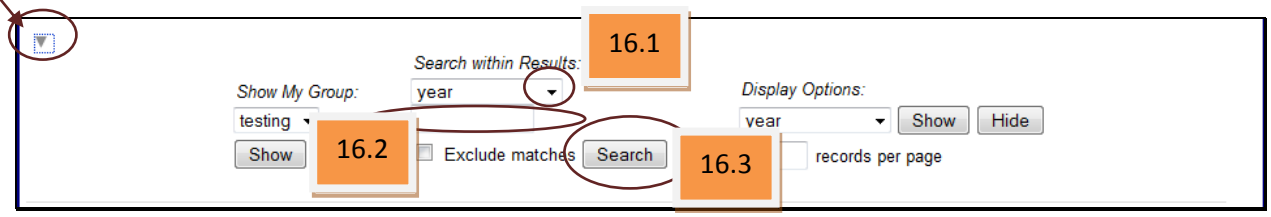


**Figure 14 (Search & Display Options)**

The results returned are 2 records that are related to **wolf behavior**; both published in 2001 (see Figure 17).


**Figure 17 (results of second search)**

If after a second search there are still too many records, the Search within Results feature in the Search & Display Options can be used as many times as necessary to narrow the results.

In the Display Options area (16.4), different columns may be added to or hidden from the current view as well as changing the number of records displayed on each page. These are reasonably easy features to use. Experimenting with them is the fastest way to learn these features.

## "Show My Group"

From the home page (the user must be logged in to see this), the records added to each customized group prior to creating the citations or exporting the data for the citation can be viewed here. Deleting existing records from a group (NOTE: it is simply a link to that record, **not** the record itself), adding a new records (from a query or individually) to a new or existing group, or creating a new group using all the records from the current group (a backup or duplicate) are all available in this one area of *refbase*.

## Customize Quick Search

The user must be logged in to the *refbase* database in order to customize the quick search. In the upper right corner of the screen, under "Welcome, <user name>", is a menu. Select **Options** from the menu (18.1).

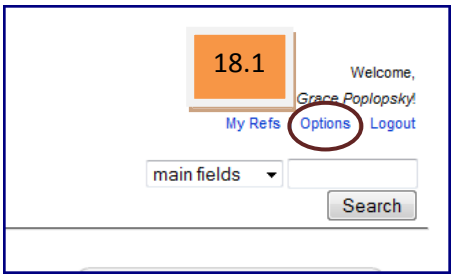


**Figure 18**

"Account details and options for <user name>" is displayed. Find the Display Options: column (19.1) and then locate the page icon (edit icon) just to the right of Display Options (19.2).

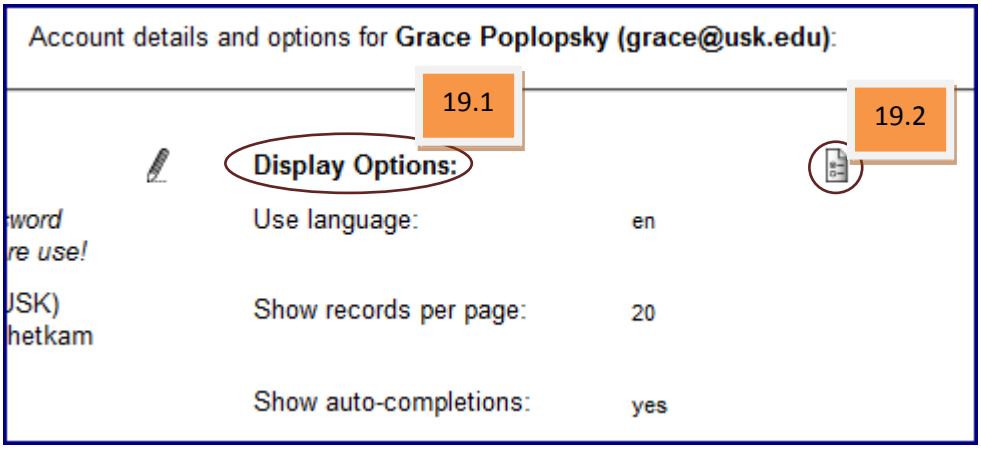


**Figure 19 (Zoom of User Options)**

This screen is where modification of the account options can be done. Scroll down the page to **"Main fields" searches:**. Highlight each field name wanted for Quick Searches. Hold down the <Ctrl> key & click on the item to keep more than one field highlighted (20.1). Once the changes

are made to this list, click Submit (20.2). The user is returned to the account details & options screen (Figure 19). **NOTE**: The main fields may be different in this database than depicted in the figures contained in this help file.

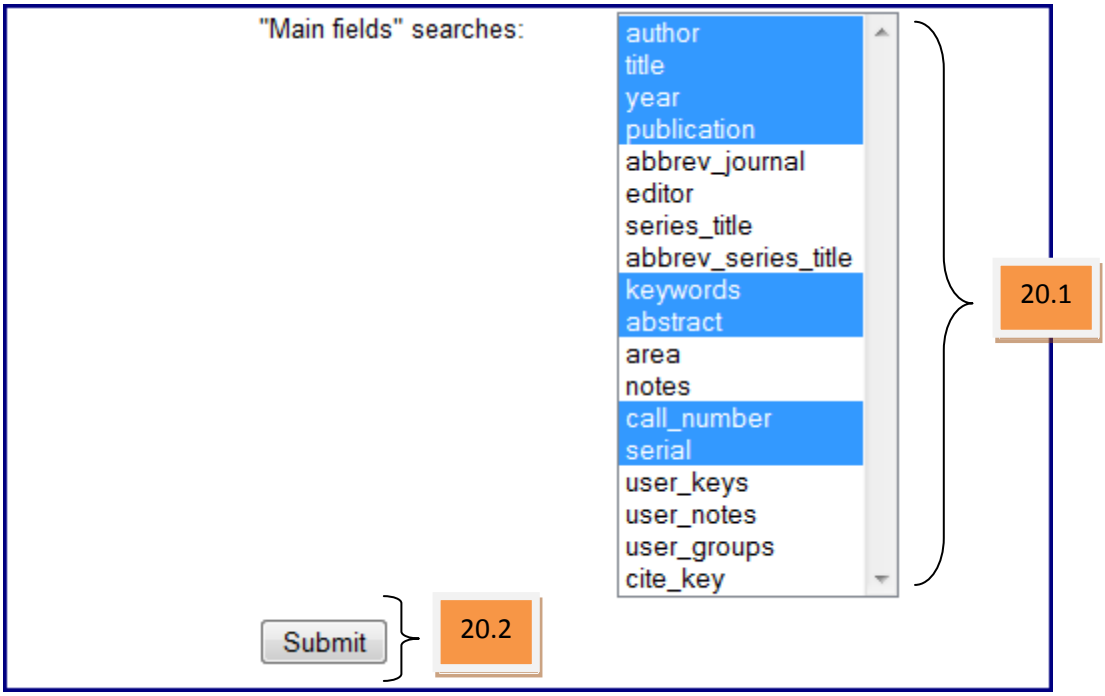


**Figure 20 (How to change Quick Search list)**

## Search Specifics

When searching, *refbase* performs a "contains" search by default. This means that *refbase* will return all records where the searched field contains the specified search string. As an example, searching the *title* field for:

***arctic***

will return records where the *title* field contains "**Arctic**", "Ant**arctic**", "Ant**arctic**a", "Ant**arctic**que" "sub**arctic**", etc. because they each contain the string **arctic**.

The "contains" search is the standard search behavior in simple search forms such as the Quick Search or Search within Results forms. It is also used in all other search forms if "contains" or "does not contain" is selected in the drop-down that specifies the search mode.

If the search string consists of several words, *refbase* will return all records where the searched field literally contains the given string of words. E.g., if you searched in the *title* field for:

***sea ice thickness***

*refbase* will return any records whose title **exactly** contains the string "sea ice thickness" (in that order). This means that quotation marks are not needed to force an exact match (as is the case for various online search engines such as Google). When searching a *refbase* database, quotation marks are treated as regular characters and have no special meaning.

Now, what if a search is required for the occurrence of two words, within one field, that are not necessarily next to each other? In *refbase*, the easiest way of searching for something like "contains xxx AND contains yyy" is to simply start your search with the first search term (xxx), then use the Search within Results from above the search results list to search for the second search term (yyy). Using this method, a complex search on multiple fields (and using multiple search terms) can quickly be accomplished without the need of figuring out the correct search pattern in advance.

When searching for two (or more) authors of a particular paper, the order in which the two authors occur in the record is not usually known. In this case, make use of the .+ (period plus) metacharacter sequence that matches any string of characters. As an example:

***Cota.+Smith***

will find all records where the field **contains** "Cota" followed by "Smith". If this search was performed on the author field, the author Cotella Smith would be included in the results; however, the name Costella Smith would not be.

## RSS Feeds

From the user home page (user must be logged in), copy the URL (from the address field in the browser) and paste it into the RSS reader of your choice (as a new feed subscription). This has been tested on Google Reader and works great. Any time a record is added to the database, this page will change and the user will have a NEW designation for this page.