EBSCO Discovery Service
&
OPAC on EBSCOhost
User Guide

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EDS & OPAC on EBSCOhost User Guide
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EBSCO Discovery Service

EBSCO Discovery Service provides users with an easy, yet powerful means of accessing all of an institution's information resources through a single search. This is achieved by harvesting metadata from both internal (library) and external (database vendors) sources, and creating a pre-indexed service of unprecedented size and speed. Although the resulting collection can be massive in size and scope, the fact that it is indexed locally (on the EBSCOhost® servers) allows for exceptionally fast search response times. As no two institutions are the same, EBSCO Discovery Service offers a vast array of customization options with regard to both the underlying collection of metadata as well as the front-end delivery of search results. All of this functionality is based upon the powerful EBSCOhost search experience familiar to researchers worldwide.

Note: With many customization options for available to administrators, your EBSCO Discovery Service appearance will be unique.

System Requirements

In order to effectively use all EBSCOhost features, the minimum browser requirements are Internet Explorer 7.0, Firefox 8.0, Google Chrome 16, and Safari 5.1 (for Macintosh). You must also have Adobe® Reader® installed to view the PDF Full Text files. If you are using Visual Search, you must also install Adobe® Flash Player 8.0 or higher.

Inside this User Guide

This guide is designed to cover the unique features of the EBSCO Discovery Service interface as well as common features of the EBSCOhost interface. User guides for all EBSCO interfaces can be downloaded from the EBSCO Support Site at support.ebsco.com.
Setting Preferences

Setting Preferences allows you to control the look and feel of the EBSCO Discovery Service Result List. The selections you make on the Preferences Screen can now be saved to your personal account (My EBSCOhost) and retrieved for use at any time. Once you sign in to My EBSCOhost, your personal preferences are applied. And, if you make changes to your preferences, those changes are saved for future use.

To set your EBSCO Discovery Service preferences:

1. From any screen, click the Preferences link in the toolbar in the upper-right of the screen.

![Preference Settings](image)

### General Settings

- **Language**
  - English 
- **Autocomplete search suggestions**
  - On / Off

### Result List Display

- **Format**
  - Standard
  - Title Only
  - Brief
  - Detailed
- **Page layout**
  - Three Columns
  - Two Columns
  - One Column
- **Sort by**
  - Relevance
  - Database Default

### Print, Email, Save Export

- **Default format**
  - Standard Field Format
  - Detailed Citation and Abstract
  - Citation Format
  - AMA (American Medical Assoc.)
  - Customized Field Format
- **Export settings**
  - Save citations to a file formatted for:
    - Direct Export in RIS Format (e.g., CITAVI)
    - Email a file with citations in:
      - RIS Format (e.g., CITAVI, EasyBib, EndNote)

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2. **General Settings** – Choose language and keyword suggestion settings.

   - **Language** – Select the language in which you want to display the interface: Spanish, French, German, Italian, Portuguese, Russian, Korean, Japanese, Simplified Chinese, Traditional Chinese, Turkish, Greek, Polish, Arabic and Thai. (Your library administrator decides whether this feature will be available.)

   - **Autocomplete search suggestions** – As you begin to enter a search term in the Find field, keyword suggestions are automatically displayed. (Set to On or Off.)

   - **Run SmartText Search when query returns no results** – If enabled by your administrator, set to automatically run your search using the SmartText Searching search mode when your initial query returns no results.

3. **Result List Display** – Choose the look and feel of your Result List.

   - **Format** – Select the level of detail for each result: Standard, Title Only, Brief or Detailed.

   - **Image Quick View** – Turn on or off the display of image thumbnails on the Result List, Citation, and Folder. (Availability varies by database.)

   - **Results per page** – Specify how many results (or records) are displayed per page (for example: 5, 10, 20, 30, 40 or 50). (Will be applied to both the Result List and the Folder.)

   - **Sort by** – You can set how you would like your results sorted. Sort by Relevance or the Database Default. (Will be applied to only the Result List.)

   - **Page layout** – Control which columns display on the Result List.

4. **Print, E-mail, Save, Export** – Set your defaults for Print, E-mail, Save and Exporting of your results. You can still change these settings when you print, e-mail, save or export your results.

   - **Default Format** – Decide how much information you want to include with your results.

   - **Standard Field Format** – Defaults to "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** – Indicates that a detailed citation and an abstract should be printed.

   - **Citation Format** – If you would like to default your citations to 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

   - **Customized Field Format** – Indicates that the Print/E-mail/Save Managers should default to this selection.
• **E-mail From** – The “From” address on the e-mail you send defaults to ephost@epnet.com. If you would like to change that address, enter the information in this field. (For example, you could enter your own e-mail address, or a library e-mail address.) This will automatically fill in the “From” field on the e-mail that is sent.

• **E-mail To** – The “To” address on the E-mail Manager defaults to a blank field. If you would like to automatically fill in the E-mail Address field with a specific e-mail address, enter the information in this field. (For example, you could enter your own e-mail address, or list of e-mail addresses for the students in class or a group of colleagues.)

• **E-mail Format** – Select whether you want to default your e-mails to Rich Text or Plain Text format.

• **Export Settings** – You may be able to export your results into a format compatible with your bibliographic management software. (For example, RefWorks, EndNote, ProCite, etc.) Your library administrator decides whether the Export feature is available.
  - Save citations to a file formatted for – Select the default bibliographic management format to save a file.
  - E-mail a file with citations in – Select the default bibliographic management format to e-mail a file.

5. Click the **Save** button. If you were previously at the Result List, it is updated according to your selections. If you were previously at the Search Screen, you must first perform a search before viewing the customized Result List.
**Guest Access**

Guest Access allows non-authenticated users to search an institution’s Discovery Service profile. When searching as a Guest, users:

- Can search all EBSCO Discovery content.
- Can view Detail Records and real-time catalog information for catalog and institutional repository results.
- Must log in to view full text content from an institution’s databases.
- Must log in to print, email, save, or export their results.
- Must log in to view Integrated Search results.

If you are accessing Discovery Service as a guest, a login prompt will be visible near the Find field on all screens and you will be prompted to log in when clicking a Result List title or full text link from a database provider (i.e. EBSCO).

**To search Discovery Service as a Guest User:**

1. Enter your terms in the **Find** field and click **Search**.

   **Note:** Depending on your institution, Guest User access may also be available by using a search box on your institution’s web site.
2. A result list is displayed.

Viewing Results as a Guest User

- Some results can only be viewed by users who are logged in. Click the Login link and enter your ID and password to view these results.

- You will be prompted to login when you click an article title and full text links from database providers.
• From the Detailed Record of a library catalog result, you may be able to view real-time availability information for the item you are viewing.
Interface Languages

Changing the Language of the Interface

If enabled by the library administrator, you can change the interface text of EBSCO Discovery Service from English to:

- Arabic
- Bahasa Indonesian
- Chinese (Simplified)
- Chinese (Traditional)
- Croatian
- Czech
- Danish
- Dutch
- Farsi
- Finnish
- French
- German
- Greek
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese (Brazilian)
- Romanian
- Russian
- Slovenian
- Spanish
- Swedish
- Thai
- Turkish

The language selection feature is located on top toolbar and the Preferences Screen in EBSCO Discovery Service.

To change the language of the interface:

1. Hover your pointer over Language on the top toolbar on the interface. The drop-down menu of available languages appears.

2. Select by clicking on the desired language in the list. The interface is refreshed and translated into the selected language.

You can set your default language to any of the languages listed above, and the next time you sign in to My EBSCOhost, the screens will display in your selected language.

To set a default language preference:

1. Sign in to My EBSCOhost.
2. From your search screen or Result List, click the Preferences link that appears below the Find field.
3. In the General Settings area, select your language from the drop-down list.
4. Click Save.
Translating an Article

By default, EBSCO Discovery Service screens are presented in English. If enabled by your library administrator, you can translate a full-text article from English into the following languages:

- Arabic
- Bulgarian
- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- French
- German
- Greek
- Hausa
- Hebrew
- Hindi
- Hungarian
- Indonesian
- Italian
- Japanese
- Korean
- Norwegian
- Pashto
- Persian
- Polish
- Portuguese
- Romanian
- Russian
- Spanish
- Serbian
- Swedish
- Thai
- Urdu

To translate the full text of an article:

1. From the article detail, select a language from the Choose Language drop-down list.
2. Click Translate. The full text of the article is presented in the language you selected.
3. To return to English, click Return.

Note: If you print, e-mail or save the full text, it will be delivered in the language of the database. However, you can print the translated text using your browser’s Print function.
Searching the Discovery Service

The Basic Search Screen lets you create a search with limiters, expanders, and Boolean operators. Because of the customization options available with EBSCO Discovery Service, your interface options may vary.

To search EBSCO Discovery Service:

1. On the Basic Search Screen, enter your search terms in the **Find** field.

2. If desired, select to restrict your results to a **Title** search or an **Author** search using the radio buttons below the **Find** field.

   **Note**: Selecting the **Title** radio button will employ the **Boolean/Phrase** search mode while selecting the **Author** radio button will employ the **Find all my search terms** search mode.

3. If you want to use any of the optional Limiters or Expanders, click the **Search Options** link.
4. You can use a specific search mode, such as "Find all of my search terms," or "SmartText Searching"; apply Limiters such as Full Text or Publication type; or use search options that expand your search, such as "Apply related words."

5. To close the Search Options, click the link again.

6. Click the Search button. The Result List displays.

The search field is displayed above the Result List. Your search terms, limiters and expanders are retained. To refine your search, you can click the Refine Search link below the Find field.

Note: If included in your institution’s Discovery Service subscription, you may see a real-time availability message included with your results. This will indicate whether the item is available at your institution or currently checked-out.
Advanced Search – Single Find Field

To use Advanced Search with Single Find Field:

1. Click the Advanced Search link below the Find field.

2. On the Advanced Search Screen, enter your search terms in the Find field.

3. If desired, select to restrict your results to a Title search or an Author search using the radio buttons below the Find field.

   Note: Selecting the Title radio button will employ the Boolean/Phrase search mode while selecting the Author radio button will employ the Find all my search terms search mode.

4. Select from the available Search Options:

   - Search modes – Use specific search modes, such as “Find all of my search terms,” or “SmartText Searching,” or use search options that expand your search such as “Apply related words.”

   - Limit your results – such as Full Text or Publication type.

   - Special Limiters – Apply limiters specific to a database. If you select a special limiter, it is applied only to the database under which it appears.
5. Click the Search button. The Result List displays. The search field is displayed above the Result List. Your search terms, limiters and expanders are retained. To revise your search, you can click the Search Options link under Limit your results.
Advanced Search – Guided Style Find Fields

To use Advanced Search with Guided-Style Fields:

1. Click the **Advanced Search** link below the **Find** field.

2. Enter your search terms in the first **Find** field on the Advanced Search screen.

3. Choose the search field from the optional **Select a Field** drop-down list (for example, search in only the Subject Terms field of the citation).

4. Repeat steps 1 and 2 for the second set of **Find** fields.

5. Select a Boolean operator (AND, OR, NOT) to combine the two **Find** field entries.

6. You can enter another Boolean operator, keyword, and search field in the third set of fields.

7. 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.
8. Select from the available Search Options:

- **Search modes** - Use specific search modes, such as "Find all of my search terms," or "SmartText Searching," or use search options that expand your search such as "Apply related words."

- **Limit your results** - such as Full Text or Publication type.

- **Special Limiters** - Apply limiters specific to a database. If you select a special limiter, it is applied only to the database under which it appears.

9. Click the **Search** button. The Result List displays.
Search History

All searches performed during your EBSCO Discovery Service session are available from the Search History/Alerts Screen. You can combine recent searches and retrieve previous searches saved in your personal folder (My EBSCOhost).

To use your search history:

1. Run a search on EBSCO Discovery Service, and view your search results.

2. Click the **Search History** link below the **Find** field. Search history is displayed above the Result List. To close Search History, click the **Search History** link again.

3. Select from the following search history features:

   - **Add lines of search statement history to your current search** – Select the lines of your search statement by marking the check boxes to the left of the search statements and then click either **Search with AND** or **Search with OR**. The lines of search history will be added to the **Find** field with the appropriate Boolean operator. Click **Search** to display a new Result List.

     **Note:** If your institution’s administrator has set EBSCOhost to clear the **Find** field after performing a search, the lines of search history will not appear in the **Find** field but the result list will reflect the new search.

   - **Copy your search into an RSS reader** – Click the **RSS alert** icon to display the Syndication Feed URL, and then copy it into your newsreader.
• **View Results for a line of your search history** – Click a linked View Results (xx). The Result List is displayed.

• **View Details** – Click a View Details link to view the Interface, Search Screen, and Database for that line of your search history.

• **Edit Search** – Click an Edit Search link. The Edit Search window is displayed. You can modify your search terms in the Find field and make any desired changes to limiters/expanders. Click Search. An updated Result List is displayed.

4. You can delete specific searches from your history by placing a check in the box next to the desired searches and clicking the **Delete Searches** button.

• 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, expanders, and search fields (author, title, subject) that 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 Actions column in place of View Results. 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.

• You can refresh your search results from within the Search History/Alerts window by placing a check in the box next to the search(es) you would like to refresh and clicking the **Refresh Search Results** button.
Editing a Search

1. Click the **Edit** link for the search you would like to edit.

2. On the **Edit Search** screen, edit your search terms, search mode, expanders and/or limiters and click **Save**.
3. A new result list is displayed. Any changes you made to your search are reflected in the Search History/Alerts window.
Visual Search

If a Visual Search link appears below the Find field, you can also search EBSCO Discovery Service and have your results presented in an interactive, visual map. You can change the style of the Result List at any time by selecting either Block style or Column style from the Display Style menu.

Columns Style Result List

To conduct a visual search:

1. Click the Visual Search link below the Find field on the EBSCO Discovery Service 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.

Note: Visual Search returns the top 250 most recent results related to your search terms.
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 view 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 EBSCOhost 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.
Search Modes

Under Search Options, the search modes offer four different ways to conduct a search. You can combine a search mode with expanders such as Apply related words, and/or with limiters such as Full Text or Publication Type.

Select from:

- **Boolean/Phrase** – Supports any Boolean searching or exact phrase searching. Stop words are ignored when part of phrases being searched.

- **Find all of my search terms** – Auto AND all search terms entered (e.g. web AND accessibility)

- **Find any of my search terms** – Auto OR all search terms entered (e.g. web OR accessibility)

- **SmartText Searching** – You can copy and paste chunks of text (up to 5,000 characters including spaces) to search for results. SmartText Searching leverages a technology that summarizes text entered to the most relevant search terms then conducts a search. This search mode is not available for all databases.

When you click the SmartText Searching radio button, the Find field grows to indicate that you can enter as much text as you want. Type in text or copy and paste text from an article, email, word document, or other source into the Find field, select any of the limiters or expanders, and click Search.

SmartText Searching will run the search using the citation's abstract and a new Result List will display. If no abstract is available, SmartText Searching will run the search on the article title. If SmartText Searching is not available in the database being searched, Find Similar Results will search the article's subject headings or descriptors.
Images

The Image Collection provides you with instant access to more than 180,000 images relating to people, natural science, places, history, and flags. The Image Quick View Collection provides thumbnails of the images in an article right from the EBSCO Discovery Service Result List, Citation View, or the Folder.

Focus your image search by using the Image Collection types available:
• Photos of People
• Natural Science Photos
• Photos of Places
• Historical Photos
• Maps
• Flags

You can also focus your search using the Image Quick View Collection types available:
• Black and White Photographs
• Color Photographs
• Diagrams
• Illustrations
• Charts
• Graphs
• Maps

To search for an image:

1. On the top toolbar, click Images. The Image Collections Search Screen appears.

2. Enter your search terms for the image you want in the Find field (for example: mountains). Your search term must match exactly a word in the title or caption of an image; the search term mountains does not yield the same results as the search term mountain range. You can use Boolean terms to further specify your search. (For example: mountains and rivers.)

3. Select from the available Image Collection or Image Quick View Collection categories to narrow the focus of your search. If you make no selections, all categories are searched.
4. Click **Search**. A Result List consisting of thumbnail images with brief descriptions appears.

- To print the image, click the thumbnail image and click **Print**. The Print Manager is displayed. Click **Print**, then print from your browser window.

- To save the image, click the thumbnail image and click **Save to Disk**. The Save Manager is displayed. Click **Save**, then save from your browser window.

**Viewing Image Quick View Results from the Result List**

If Image Quick View Collection results are available for your EBSCO Discovery Service keyword search, they will appear with their related articles in the result list and the article detail page.

Click on a thumbnail image to view the full size version of the image.
Personal Account

If provided by your library administrator, you can set up a personal account that you can use to 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 Create a New Account link.

2. The Create a New Account Screen appears with Personal Account entered in the Account Type field. Fill in the fields on the Create a New Account Screen. When you have completed the fields, click Submit.

3. If all the information was accepted, a message appears that provides your user name and password. Click OK. You will be automatically logged 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 Sign In 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 logged in as a personal user based on your new password. You should note the new password so you can log in at a future session.

If you have forgotten your user name and password, you can submit information to retrieve your user name and password.

To retrieve your user name and password:

1. From the Sign In Screen, click I forgot my user name and password. A screen appears.
2. You are prompted to enter your first name, last name and e-mail address. Click Continue. The Reset Your Password Screen appears with your user name displayed.
3. You are prompted to answer the question you entered as a password hint, enter a new password twice.
4. Click Continue. You are automatically logged in as a personal user based on your new password. You should note the new password so you can log in at a future session.

If desired, when you sign in to My EBSCOhost, you can retrieve Preferences settings that you selected and saved in a previous session.

To load Preferences from My EBSCOhost:

1. From the Sign In Screen, enter your user name and password.
2. Mark the Load Preferences from My EBSCOhost check box.
3. Click the Login button. Any Preferences that you set during the session are replaced with your saved Preferences settings.

If your information has changed, you can update your account with the new information.

To update your account:

1. Sign in to your personal folder by clicking Sign In in the toolbar at the top of the screen.
2. Click the Update My Account link found in the personalized toolbar at the top of the screen
3. Use the options on the page to update your account - such as change your e-mail address.
   **Note:** You cannot change your User Name.
4. Click Submit to save your changes. A message is displayed confirming that your account has been updated.
Saving Searches

If enabled by your library administrator, you can set up a personal account that you can use to save searches, retrieve and reuse them, and print them as needed. For information on saving a search as an alert, see Saving a Search as an Alert.

To save searches:

1. Run a search on EBSCO Discovery Service and view your search results.
2. Click the Search History link, then click the Save Searches/Alerts link. The Saved Search/Alerts Screen appears. If you have not signed in to My EBSCOhost, you will be prompted to do so.
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 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 signed into your personal account, you will be prompted to do so. Enter your user name and password; or click Cancel and return to the Search Screen.
3. The Saved Searches area of your folder displays.
4. Click on the Retrieve Saved Search link for the desired search.

To print search history:

1. From the Search History/Alerts Screen, click Print Search History. A browser window appears with the search history formatted for printing.
2. On the browser toolbar, click the Print icon. To close the browser, click the x in the top right corner of the window.
Setting Up a Journal Alert

You can also set up an e-mail alert to automatically notify you each time a new issue of a selected journal title is available. For a list of EBSCOhost databases that support the creation of Journal Alerts, click here.

To set up a journal alert:

1. Click the Publications link at the top of the screen. The Publications Screen displays.

   ![Publications Screen]

2. To locate the publication, enter the title in the Browse Publications field and click Browse, or use the A - Z links and left/right arrows to browse through the list of titles.

3. From the journal's Publication Details Screen, click the Alert/Save/Share link, and then click the E-mail Alert link. If you have not signed in to My EBSCOhost, you will be prompted to do so.
4. The Journal Alert window appears, with the Subject and E-mail from address automatically filled in. If you have not already signed into your My EBSCOhost account, do so by clicking the Sign in link.

5. Set your alert parameters and click Save Alert.

Notes:
- Before your alert expires, you will be e-mailed and given the opportunity to renew it.
- To view all available alert parameters, click the Advanced Settings link.

In the E-mail area

1. Subject – enter a brief explanation that will appear in the subject line of the Journal Alert e-mail.
2. E-mail from - defaults to EPAlerts@EPNET.COM. You can enter a different “From” e-mail address if desired.
3. E-mail to - 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.
4. 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.
5. **Select the E-mail format to use** - Plain Text or HTML.

6. **E-mail contents** - Indicate whether you want to include: Link to table of contents or Link to individual articles.

**In the General Settings area**

1. **Select the Results format to use** - Brief, Detailed, or Bibliographic Manager formats.

2. **Alert on full text only** – Mark the check box to indicate that you want to be alerted only when the full text is available.
   - One month (the default)
   - Two months
   - Six months
   - One year

**Using the Advanced Alert Settings**

Click the **Advanced Settings** link to view the Journal Alert screen, featuring all available parameters.

**In the Run Alert for field**, select how long the journal alert should run:

**In the Alert Options area**

1. **Select the Alert results format to use**: Brief, Detailed, or Bibliographic Manager formats.

2. **To limit EBSCO Discovery Service access to only the articles in the alert** (rather than the entire site), mark the checkbox 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 Options 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: **EBSCOhost 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. Indicate whether you want to include: Link to TOC page on EBSCOhost or Article links embedded within the results.

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.
Saving a Search as an Alert

EBSCO’s Search Alert feature automates the process of checking for new results from a specific search. Save any search you’ve conducted as a Search Alert, and EBSCO Discovery Service will automatically e-mail you with any new results. You can also retrieve those alerts to perform the search immediately, instead of waiting for the alert to run. There are three ways to save your search as an alert.

Saving from the Alert/Save/Share Link

To save your search as an alert from the Alert/Save/Share link:

1. Run a search on EBSCO Discovery Service and view your search results.
2. Click the Alert/Save/Share link and select E-mail alert from the resulting pop-up menu. The Create Alert window will appear over the result list.
3. If you have not done so already, click the Sign in link in the alert window to sign into your My EBSCOhost folder.
4. Set your alert parameters and click Save Alert.
In the **E-mail** area of the window:

1. **Subject** - In the **Subject** field, enter a brief explanation that will appear in the subject line of the Alert e-mail.

2. **E-mail from** - Defaults to: **EPAlerts@EPNET.COM**. You can enter a different "From" e-mail address if desired.

3. **E-mail to** - Enter your **E-mail Address**. If you are entering multiple e-mail addresses, place a semicolon between each e-mail address.

4. **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.

5. **E-mail format** - Select Plain Text or HTML.

In the **General Settings** area of the window:

1. **Frequency** - Select how often you want to receive the alerts.

2. **Articles published within the last** - Select the time frame for the alerts.

3. **Results format** - Choose how you want to receive the results: Brief or Detailed.
1. **Frequency** - Select how often the search will be run:
   - Once a day (the default)
   - Once a week
   - Bi-weekly
   - Once a month

2. **Results format** - Select a results format for your alert.
   - Brief
   - Detailed
   - Bibliographic Manager

3. **Articles published within the last** - To limit which articles are searched, select one:
   - One month
   - Two months
   - Six months
   - One year
   - No limit (the default)

**Note**: To view all available alert settings, click the **Advanced Settings** link.
One-Step RSS Search and Journal Alerts

If you prefer to view your search or journal alerts via an RSS reader, one-step alerts offer a quick and easy way to obtain the alert syndication feed, which you can then copy into your RSS reader.

Note: Be sure to add the feed to an aggregator within one week of its creation. A one-step alert will not expire unless the aggregator does not automatically update results (extremely unlikely) supplied by the feed for two months.

Your library administrator decides whether one-step alerting is available.

To set up a one-step RSS search or journal alert:

1. From the Result List or Search History Screen, click the RSS alert icon or the RSS Feed link on the Alert/Save/Share pop-up screen.

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

3. Click the Save Alert button.
4. If you decide that e-mail delivery of the alert information is required, click the Sign in link. Once you sign in to My EBSCOhost, the Search Alert Screen appears. You can save the alert as described in Saving a Search as an Alert.

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

To set up a one-step RSS journal alert:

1. Click the Publications link at the top of the EBSCOhost screen. Once you have found the desired publication, click the RSS alert icon to the left of the publication name.

   ![Publications Screen](image)

   - **Publications** link
   - **Search Alert Screen**
   - **Save Alert** button
   - **Sign in** link
   - **RSS Feed URL**

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

   ![General Settings](image)

3. Click the Save Alert button.

4. If you decide that e-mail delivery of the alert information is required, click the Sign in link. Once you sign in to My EBSCOhost, the Journal Alert Screen appears. You can save the alert as described in Setting Up a Journal Alert.
Creating an Alert from the Search Screen

If enabled by the library administrator, you can set up search alerts in just one step directly the Search screen.

To create a search alert from the search screen:

1. Enter a search term for your alert in the Find field and click Create Alert.

2. The result list screen will be displayed with the Alert window appearing.

3. Click the Sign in link to sign in to your personal My EBSCOhost folder account.
4. Set your alert parameters.

5. Click Save Alert to save the alert to your folder.

Click Cancel Alert to cancel the alert and return to the Result List.

Click Save Alert and Create Another to save the alert to your folder and return to the search screen.

Notes: To view all available alert parameters, click the Advanced Settings link.
Result List

Search results can be citations, library catalog records, full text articles, books, multimedia, document summaries or abstracts, and can include links to full text.

The Result List Screen has three columns:

- **Left - Limiters and Facets**
- **Middle - Results Display**
- **Right - Related Information**

You can hide or show the different areas by clicking the control arrows at the top of the left and right columns. Your library administrator decides whether the facets in the left column are displayed.

Left - Limiters and Facets

The Left Column displays the Breadbox feature, Limiters, and Facets.

- **Breadbox** - Click the toggle arrow to open the Breadbox. The Breadbox keeps track of the numbers of results, your search terms, search options, and clusters applied to your search.

- **Limit your results** – Apply limiters right from the Result List. Select any of the limiters displayed and click Update. A revised Result List displays. (You can refine your search even more by clicking the Show More link under Limit your results.)
• **Facets** – You can narrow by source type, subject, journal, author, and more. 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.
  
  o To narrow your results, check the box for one or more subject terms in a section of your choice and click **Update**. A new Result List, limited to the chosen term or terms is displayed and the list of subject terms is refreshed. For more info, see **Facets**.

**Middle - Results Display**

**Results Display** – The articles that were found are displayed in the center of the Result List Screen. You can also access the **Result Sort**, **Page Options**, and **Alert/Save/Share** drop-down menus from the Results column.

• The **article title** link takes you to the citation information and/or the full text. Place your mouse over the **Preview** icon 📖 to view the Abstract.

• The **HTML Full Text** link takes you directly to the full text of the article.

• The **PDF Full Text** link takes you to a PDF version of the full text. The PDF will open in the Adobe® Reader®.

• The **Audio Summary** link prompts you to download or listen to audio summaries. (*Business Book Summaries* database only.)

• **Add to Folder** – To save an article to the Folder, click the **Add to Folder** link to the right of the Relevancy indicator, or inside the Article Preview that you hover over with your mouse.

• **Subjects** – Subject Terms that are assigned to each item are displayed in the result list.

• **Result List Sort** – Click this link to select one of the following result list sorting options: Date Descending, Date Ascending, Author, Source, or Relevance.

• **Page Options** – Click this link to view the page display options.

• **Alert/Save/Share** – Click this link to view alerting, linking and bookmarking options.

**Right - Related Information**

When additional sources such as EBSCOhost Integrated Search, images, blogs, widgets, and Web news are available, they will be displayed in this column.

• **EBSCOhost Integrated Search Panel** – If your institution subscribes to EBSCOhost Integrated Search, the EHIS panel will appear in the right column. For more information, see **Using Integrated Search with Discovery Service**.

• **Folder** – If articles are stored in the folder, they will appear in this column under **Folder has items**. To view the items in your Folder, click the **Go to Folder View** link. To save them, sign in to your My EBSCOhost folder. *(Note: If the Integrated Search Panel is present, folder items do not appear in this column.)*

• **Related Images** – Place your mouse over an image—a full size view of the image displays.
• **Additional Source Types** – You may be able to refine your results list by additional source types when the appropriate databases are being searched. These additional Source Types include:
  - Videos
  - Business Videos
  - Small Business Videos
  - Historical Images

• **Widgets** – If any additional resources have been added by your administrator using widgets, they will appear in this column.

**Notes:**
- The library administrator decides which features will be available, so your Result List may look slightly different.
- You can save the look of your Result List for future sessions by making changes in the **Preferences** area and signing in to your My EBSCOhost folder.

**Page Options**

Use this drop-down menu to customize how your result list page is displayed.

**Note:** The setting currently being used is highlighted with a yellow box.

**To set your Page Options:**
- **Result Format** - Click the select a result list format.
- **Image QuickView** - Select whether or not you would like thumbnails of images from your articles to display on the result list.
- **Results per page** - Select the number of results per page you would like displayed.
- **Page Layout** - Select your desired column layout for the Result List.
Alert/Save/Share

To use the Alert/Save/Share menu:

- **Add to folder** - Add all displayed articles to the folder or add the search to the folder as a persistent link to a search.

- **Create an alert** - Create a search alert e-mail or an RSS feed right from the Result List, even if you are not signed in to My EBSCOhost.

- **Use Permalink** - Highlight the link text and copy using your browser’s copy function. You can immediately paste the link into a website, document or e-mail.

  You can also store links to your EBSCO Discovery Service pages to social bookmarking sites such as dig, del.icio.us, Technorati, bloglines, etc.

- **Export Results** - If enabled by your administrator, click to email a link to download exported results.

  **Note**: Up to 5000 results can be exported.
Facets

Your library administrator decides whether the facets (also known as “clusters”) will display with your results. When facets are available, they will appear in the column on the left side of the Result List.

Hide or show the different facets by clicking the control arrows near the top of each cluster. You can narrow by source type, subject, journal, and more. This feature 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.

If enabled by your administrator, hit counts are available indicating the number of results for each facet. Facets are displayed by hit count in descending order.

To use facets:

1. Select a term or multiple terms by selecting the checkboxes in a facet.  
   **Note:** Terms can be selected in only one section at a time. The rest of the screen will be grayed out until you have finished making selections and click Update.

2. Click the Show More link (if available) to view all available terms.

3. Finish making your selections and Click Update.
   
   **Note:** You can select to re-sort Subjects by name by clicking the Name link at the top of the facet.
A new Result List, limited to the chosen term or terms is displayed and the selected terms are added to the Breadbox.

Notes:
- When you select a single heading (Subject, Journal, Author, etc.) from a facet on the result list and click **Update**, the heading is added to the search terms with the AND operator, limiting results to only those related to the search terms and subject heading.
- When you select multiple headings from a cluster before clicking the **Update** button, the headings are added to the search terms with the OR operator to prevent the user from receiving zero results.
- To limit your search to fewer results by using multiple headings, it is recommended that you select one subject heading and update the search before adding an additional heading.
Using the Breadbox

The Breadbox is located at the top of the left column and keeps track of your entire search by displaying:

- The number of available results.
- Your search query.
- All applied limiters and expanders.
- Applied source types.
- Applied subject terms.

Each limiter, expander, source type, and/or subject term you selected is added to the Breadbox with an ‘x’ icon. Clicking on the icon will remove the corresponding term from the search and a new result list will be displayed.

Clicking on a hyperlinked breadcrumb item will execute a search for only that term.
Reading an Article

When you click the title of an article, the “Best View” selected by your library administrator is displayed. To view a different format, click on the citation, HTML full text or PDF icon.

Detailed Record

When the Detailed Record is displayed, it may also include a summary or an abstract. If activated by your library administrator, the full text of the article may appear below the Detailed Record. The Image Quick View feature provides the ability to view thumbnails of the images in an article right from the citation.

- The author and subject terms of the record can appear as links that let you perform a search of that particular field.
- If the article is available in your institution’s catalog, you can click the Link to catalog record link found in the column on the left to view the catalog information for that item. In addition, you may also have the ability to view the Holdings Information for that item below the Catalog link.
- When available, a Find Similar Results link will display on the citation. Click the link to perform a SmartText search for related articles. SmartText Searching will run the search using the citation’s abstract and a new Result List will display. If no abstract is available, SmartText Searching will run the search on the article title. If SmartText Searching is not available in the database being searched, Find Similar Results searches the article’s subject headings or descriptors.
- 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.
If there are other editions or formats of the item available from your institution's catalog (Book, eBook, Audiobook, etc.) they can be viewed in the Other Formats and Editions widget.

**HTML Full Text View**

When the HTML full text view is displayed, you can also return to the Detailed Record, 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 Detailed Record or Full Text views, you can refine your search and return to the Result List.

- When available, a **Find Similar Results** link will display on the Detailed Record and HTML Full Text views. Click the link to perform a SmartText search for related articles. SmartText Searching will run the search using the citation's abstract and a new Result List will display. If no abstract is available, SmartText Searching will run the search on the article title. If SmartText Searching is not available in the database being searched, Find Similar Results searches the article's subject headings or descriptors.
PDF Full Text Viewer

When PDF Full Text is displayed, it will be viewed in the PDF Full Text Viewer tool.

Tools Menu

When viewing an article, there are several tools available to you on the right-hand side of the screen.

- **Add to folder** - Add the article to the session folder or your personal My EBSCOhost folder.
- **Print** - Print the article.
- **E-mail** - E-mail the article to yourself or multiple e-mail addresses.
- **Save** - Save the article to a destination on your computer.
- **Cite** - Retrieve citation information for the article in several different formats.
- **Export** - Export the article to your bibliographic management software.
- **Create Note** - Save a note on the article to your My EBSCOhost folder.
- **Permalink** - Copy and paste a persistent link to the article.
- **Bookmark** - Bookmark the article to one of many to social bookmarking sites such as dig, del.icio.us, Technorati, bloglines, etc.
- **Listen** - Hear the HTML Full Text of an article read to you using Text-to-Speech. (If enabled by your administrator.)
- **Translate** - Translate the HTML Full Text of the article to one of many available languages. (If enabled by your administrator.)
Using Text-To-Speech

If enabled by your administrator, EDS can read HTML articles aloud to you using the Text-To-Speech feature.

To use Text-To-Speech:

1. Locate an EBSCOhost article in HTML format which you would like read to you.
2. From the Accent drop-down menu, select an accent in which you would like the article to be read.
3. Click the Settings icon to set your Reading Speed and Highlighting Options.
4. Click the Listen button to hear the article read out loud.
   -OR-
   Click the Download button to download an MP3 file of the article being read to your computer.
Use Text-To-Speech to Hear a Section of an Article

You may also choose to have only a section of an article read to you.

Global warming's evil twin threatens West Coast fishing grounds

Over the next few decades, coastal waters off of California, Oregon, and Washington are in danger of becoming acidic enough to harm the rich fisheries and diverse marine ecosystems there, according to a new study. Blame it on global warming's evil twin.

The process changing the seas' chemistry has been dubbed "ocean acidification." It refers to the impact that rising carbon dioxide levels in the atmosphere are having on seawater. CO2 emissions are increasing as humans burn fossil fuel and change land-use patterns. The oceans absorb up to 26 percent of the carbon dioxide that is expected to go up as the Arctic Ocean loses more of its summer sea-ice cover.

Highlight the passage of text you would like to be read out loud. A new mini-toolbar appears. Click the Listen button on the mini-toolbar.

Downloading Text-to-Speech MP3s

You may also download audio files of HTML articles being read aloud to your computer in MP3 format.

To download Text-to-Speech MP3 files:

1. On the Text-to-Speech toolbar, click the Download button.

2. Select to Open or Save the file to your computer.

3. If saving the file, browse to a location in the Save As dialog box and click Save.

The MP3 file is saved to your computer.
Viewing Catalog Results

EBSCO Discovery Service lets you view catalog details for a result in your library's catalog. If included in your subscription to EBSCO Discovery Service, you may also see real-time availability information that informs you of the up-to-the-minute status of an item in your library.

To view a library catalog record:

1. Perform a search on EBSCO Discovery Service.

2. On the result list, click the Article Title about which you would like library catalog information.

3. The Detailed Record is displayed.

4. If enabled by your administrator, Enhanced Catalog Record information appears in the left column under Related Information and below the book jacket image.
Additional book enrichment data from Library of Congress may include:
- Table of Contents
- Author information

Related Information may include:
- Reviews of the title being viewed.
- Similar Books.
- Other books by the same author.
- Summaries from Literary Reference Center. *

* Included if subscribed to Literary Reference Center and database is included in your search

**Real-time availability**

If included in your institution's EBSCO Discovery Service (EDS) subscription, you will see up-to-date information that advises you of the availability of a resource within the library. Real-time availability advises the user of:

**Status:**
- Available
- In Library Use
- On Hold
- Checked Out
- Missing
- Lost

**Location:**

If your library is part of a library group, you will also be advised of the specific location of an item within the group of libraries.

**Examples:**

Your real-time catalog updates may look like the following examples:

```
Link to catalog record
```

```
Link to catalog record
```

```
Link to catalog record
Call No. J841 6A 1.5/2:T-RCED-98-219 Main 2nd floor Government Documents
```
Enhanced Catalog Records

Enhanced Catalog Records provide additional related information to catalog results in EBSCO Discovery Service (EDS) or EBSCOhost searches.

Additional book enrichment data from Library of Congress may include:

- Table of Contents
- Author information

Related Information may include:

- Reviews of the title being viewed.
- Similar Books.
- Other books by the same author.
- Summaries from Literary Reference Center. *

* Included if subscribed to Literary Reference Center and database is included in your search
Using Integrated Search with Discovery Service

EBSCOhost Integrated Search allows users to simultaneously search EBSCO Discovery Service as well as all other electronic resources, including those from other database aggregators, OPACs, and publisher packages. However, unlike federated search products, true integration is possible with EBSCOhost Integrated Search as libraries can now apply the powerful EBSCO Discovery Service search experience to all of their other electronic information resources.

Conducting a Search

To conduct an EBSCO Discovery Search with EBSCOhost Integrated Search:

1. On the EBSCO Discovery Service search screen, enter your search terms in the **Find** field.

2. If you desire, select any of the available Limiters.

   Limiters that apply to all selected databases, EBSCO Discovery Service or external sources (i.e. non-EBSCOhost sources), will appear directly under Limit your results.

3. Click the **Search** button.

4. The Result List displays with the Integrated Search Panel on the right-hand side of the screen.
Note: EBSCO Discovery Service will remove multiple instances of one record and display only the one with the most information included (i.e. full-text, longer abstract, more relevant.)

5. To view details about your search in the Database Status Hover, including results per database and search retrieval times, hover your pointer over the Detail hover icon found above the Integrated Search Panel.

Viewing the Result List

Search results can be citations, full text articles, document summaries or abstracts, and can include HTML or PDF full text as well as links to full text from external sources.

- Limit your results – Apply limiters right from the Result List. Select any of the limiters displayed and click Update. A revised Result List displays. (You can refine your search even more by clicking the Show More link under Limit your results.)

- Clustering – You can narrow by source type, subject, journal, author, and more. 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.

  o To narrow your results, check the box for one or more subject terms in a section of your choice and click Update. A new Result List, limited to the chosen term or terms is displayed and the list of subject terms is refreshed. For more info, see Clustered Results.
**All Results** – The articles that were found display in the center of the Result List Screen.

- The **article title** link takes you to the citation information and/or the full text. Place your mouse over the **Preview** icon to view the Abstract. 📚 indicates citation only; 📚 indicates citation plus full text.

- The **HTML Full Text** link takes you directly to the full text of the article.

- The **PDF Full Text** link takes you to a PDF version of the full text. The PDF will open in the Adobe® Reader®.

- The **Retrieve Full Text** link takes you to the available full text of the article from an external source.

- **Add to Folder** – To save an article to the Folder, click the **Add to Folder** link, or when available, inside the Article Preview that you hover over with your mouse.

- **Folder** – To save an article to the Folder, click the **Add to Folder** link to the right of the Relevancy indicator. To view the items in your Folder, click the **Go to Folder View** link.

- **Related Information** – When additional sources such as images, blogs, and Web news are available, they will be displayed.

- **Related Images** – Place your mouse over an image—a full size view of the image displays.

- **Alert/Save/Share** – Click this link to view alerting, linking and bookmarking options.
  - **Create an alert** – Create a search alert or an RSS feed right from the Result List, even if you are not signed in to My EBSCOhost.
  - **Add search to folder** – Add the query to the folder as a persistent link to a search.
  - **Permalink** – 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.
 Bookmark – Store links to your EBSCOhost pages to social bookmarking sites such as dig, del.icio.us, Technorati, bloglines, etc.

Notes:

- When only external sources are being searched, the Alert/Save/Share menu will feature Add search to folder, Permalink, and Bookmark as options.

- If results from external sources are displayed in the result list, limiters will be available to refine your search from the Search Options link under Limit your results.

**EBSCOhost Integrated Search Panel**

**To use the Integrated Search Panel:**

- Only EBSCO Discovery Service is treated as a Tier 1 database and will have results available in the results list after the initial search. All other resources are treated as Tier 2 databases and will appear in the Result List after you choose to view their results.

- To view the number of results for a particular database, hover your pointer over the database name. The number of results will be displayed.

- To view results for a particular database, click the linked database name. The result list will be updated to reflect only results from that source.

- To view results from select databases, place a check in the boxes for the databases you would like to view results for and click the View Results button. Your Result List will be updated to reflect the selected databases.

- You can read a description of a database by hovering your pointer over the icon.

- When a connection to a source cannot be established, an icon will appear.

- Click the All or Less link in the upper right corner of the panel to expand or shorten the list of databases that were searched.
Integrated Search Details

You can view database specific information about your search in the Database Status Hover by clicking the Details link found at the top of the Result List.

The first table displays:

- **Results Displayed**: Results available from EBSCO Discovery Service and displayed in the current Result List.
- **Total Results**: Total number of results found per database.
- **Retrieval Time**: Retrieval time for the search on each database.

The second table displays:

- **Results Available**: Results available to display from all other sources designated as Tier 2. Up to the Top 30 results from each external source are available to view.
- **Total Results**: Total number of results found per database.
- **Retrieval Time**: Retrieval time for the search on each database.
Saving External Results to the Folder

You can save articles from sources other than EBSCOhost to the Folder from the article citation, or from the Result List.

Click the Add to Folder link or icon.

The articles you add from external sources will appear in the folder under Other Content Sources.

You can then print, e-mail or save many results all at the same time. If you have signed in via My EBSCOhost, any search results that you collect in your folder will be automatically saved at the end of the session.

Note: Because results from external providers use session URLs, links to articles from those providers are not available from within your folder.
Using the Folder

To collect several articles, click the Add to folder link at the bottom of each article result. To add all items on a page to your folder, open the Alert/Save/Share menu and click Results (X-XX) at the top of the results. 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 (or the Go to Folder View link) and review which items have been added. The Image Quick View feature provides the ability to view thumbnails of the images in an article right from the Folder screen.

You can then print, e-mail or save many results all at the same time. If you have signed in via My EBSCOhost, any search results that you collect in your folder will be automatically saved at the end of the session.
Managing Custom Folders

The custom folder feature provides the ability to create numerous folders, each on a particular topic, for example, in which various results can be sorted and stored. You can customize the name of each folder and determine which folders nest within other folders, to maximize efficiency when managing saved items.

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 personalized user (My EBSCOhost) 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 an “Environmental Science Project” folder, and then place a “Going Green” sub-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 **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 the **plus sign** next to the folder that you want to delete.

2. Click the **Edit** link below the folder name.

3. Click the **Delete Folder** button. A confirmation message displays.

4. 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, click the **Edit** link below the folder that you want to move.

2. From the **Move Folder to** drop-down list, select the folder to which you want to move the items (the “target” folder).

3. Click **Save**. 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. To select all, mark the **Select All** check box to the left of the Delete Items button.)
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. To select all, mark the **Select All** check box to the left of the Delete Items button.)

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. To select all, mark the **Select All** check box to the left of the Delete Items button.)

2. Click the **Delete Items** button. The items are automatically deleted.
Saving Articles to a Specific Folder

If you have custom folders created within your My EBSCOhost folder, you can specify which folder you would like your articles saved in, when you click the **Add to Folder** link.

The article is added to the folder you specify.

When you click the **Add/Remove** link, the name of the folder which contains the article displays a folder icon.

- To move the article to a different folder, click the name of the folder you would like to move the article to.
- To remove the article from the folder entirely, click the name of the folder that contains the article.
Printing Your Results

You can set the defaults for Standard Field Format and Citation Format on the Preferences Screen. The selections that are set on Preferences will be applied when printing.

To print one or more articles or citations:

1. From the article, click the Print icon.

The Printing panel is displayed at the top of the article.

2. Accept the defaults and click Print. The Printing dialog box appears.

3. Click OK to being printing.

4. To return to the article or citation, click Back.

Advanced Features:

- 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.

- 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.

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

- 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.)

- 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 – Indicates that a detailed citation and an abstract should be printed.

- 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

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

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:

To print an item in PDF Full Text format, you must use the Adobe Reader Print option. When viewing the PDF document in your browser window, the Adobe Print option (a printer icon) is included on the Adobe Reader toolbar located above the article. Note that if the item includes a citation and/or HTML text, they will print from the browser window.

To print Linked Full Text:

- If you are printing an article that includes Linked Full Text, you must follow the links directly to the Full Text and then print.
- If the article 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.
E-mailing Your Results

You can set the defaults for Standard Field Format, Citation Format, E-mail Format, and the default E-mail To address on the Preferences Screen. The selections that are set on Preferences will be applied when e-mailing.

To e-mail an article:

1. From the article, click the E-mail icon.

The E-mailing panel is displayed above the article.

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. To send the e-mail, click Send; otherwise, click Cancel. A message appears when your e-mail has been sent.

Advanced Features:

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

- **Comments** - enter any comments you would like to include with your e-mail.

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

- 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.

- **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 use the “Customized Field Format” selection.) Persistent links to articles are automatically included in the e-mail.

- **HTML Full Text (when available)** – Include the HTML Full Text of the article, if available.
• **PDF as a separate attachment** (when available) – Include all citation information and the article in Adobe PDF format, if available.

• **Standard Field Format** - Most users will choose the default - “Detailed Citation and Abstract.” You can also select from the drop-down list:
  
  o **Brief Citation** – Indicates that only a brief citation should be e-mailed.

  o **Brief Citation and Abstract** – Indicates that a brief citation and an abstract should be e-mailed.

  o **Detailed Citation and Abstract** – Indicates that a detailed citation and abstract should be e-mailed.

• **Citation Format** - If you would like to save your citations in a specific format, select one from the drop-down list:
  
  o **AMA** - American Medical Association

  o **APA** - American Psychological Association

  o **Chicago/Turabian Author - Date**

  o **Chicago/Turabian Humanities**

  o **MLA** - Modern Language Association

  o **Vancouver/ICMJE**

• **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.)

**To e-mail Linked Full Text:**

If the results include Linked Full Text, the Linked Full Text cannot be delivered via the folder. 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 a persistent link to a search:**

1. Click the **Alert/Save/Share** link on the right of your Result List.

2. Click the hyperlinked terms to the right of **Add search to folder**. The search query is now saved in the folder as a persistent link to a search.
3. From the Persistent Links to Searches area of the folder, click the **E-mail** icon. The **Links to Searches** area of the E-mail Manager displays.

4. 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.)

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

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

7. 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.

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

9. 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**.

(The library administrator decides whether the persistent links feature is available.)
Saving Your Results

You can set the defaults for Standard Field Format and Citation Format on the Preferences Screen. The selections that are set on Preferences will be applied when saving.

To save an article:

1. From the article, click the **Save** icon.

   ![Save icon](image)

   The Save panel is displayed.

2. To save the results, click **Save**. Otherwise, click **Cancel**.

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

4. Click **Save**. To return to the article, click **Back**.

**Advanced Features:**

- 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.

- **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.

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

- **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.)
• **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.

• **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

**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 the results include Linked Full Text, the Linked Full Text cannot be delivered via the folder. 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. Click the Alert/Save/Share link on the right of your Result List.
2. Highlight the link text in the Permalink box 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. Click the Alert/Save/Share link on the right of your Result List.
2. Click the hyperlinked terms to the right of Add search to folder. The search query is now saved in the folder as a persistent link to a search.
3. From the persistent links to searches area of the folder, click the Save icon. The Links to Searches area of the Save Manager displays.
4. 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.
5. Click Save; otherwise, click Back.
6. 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.

(The library administrator decides whether the persistent links feature is 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. You can set the defaults for your preferred Export Settings on the Preferences Screen. The selections that are set on Preferences will be applied when exporting.

To save citations in bibliographic manager format:

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

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 your file.

2. Save citations to a file formatted for, select one of the following:

   o Direct Export in RIS Format (e.g. CITAVI, EndNote, ProCite, Reference Manager, Zotero) - includes those fields supported by reference managers that utilize Research Information Systems (RIS) format for bibliographic management. (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.)

   o Generic bibliographic management software - includes all fields available with a citation.

   o Citations in XML format - includes all fields in XML format. Click here to view a Document Type Definition file for a description of each of the XML tags.

   o Citations in BibTeX format - includes citation fields in BibTeX format.

   o Citations in MARC21 format - includes citation fields in MARC21 format.

   o Citations in MARC21 format - includes citation fields in MARC21 format.
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 Web - includes those fields supported by ISI's Direct Export technology for exporting to EndNote Web.

3. Click Save.

   o 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:ProjectResearchInfo). 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.

   o 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.

To e-mail citations in bibliographic manager format:

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

2. Click the E-mail link at the top of the Export Manager panel.

3. 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 e-mailing your file.

4. 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).

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

6. Enter any Comments you would like to include with your e-mail.
7. **E-mail a file with citations in** - select one of the following:

- **RIS Format** *(e.g. CITAVI, EndNote, ProCite, Reference Manager, Zotero)* - includes those fields supported by reference managers that utilize Research Information Systems (RIS) format for bibliographic management. *(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 format** - includes all fields available with a citation.

- **Citations in XML format** - includes all fields in XML format. Click [here](#) to view a Document Type Definition file for a description of each of the XML tags.

- **Citations in BibTeX format** - includes citation fields in BibTeX format.

- **Citations in MARC21 format** - includes citation fields in MARC21 format. *(Note: Persistent links to the records are automatically included in the e-mail and the export file.)*

8. 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.
Notetaking

The Notetaking feature assists with your research by allowing you to take notes on articles and save them to your My EBSCOhost folder for later viewing.

To use the Notetaking feature in EBSCO Discovery Service:

1. From the Detailed Record or HTML Full Text on which you would like to leave a note, click on the Create Note icon in the tools menu on the right.

2. Click the +New Note button.

3. The Create Note window appears. The article citation information will appear in the Context area.
4. Enter the text of your note in the field provided. When finished entering your note, click the Save button.

5. The Note is saved to the folder and is displayed in the Notes panel. Click Sign in to store notes to save your notes or click the Folder Notes View link to view your notes in the EBSCOhost folder.

6. From inside the EBSCOhost folder, your note is available by clicking Notes in the menu on the left side. To save your note beyond this session, sign in to your My EBSCOhost folder.

7. To view your Note, click the Note title in the folder. You can view the page on which the note was taken by clicking the View Context link.