NICE National Institute for Health and Care Excellence

# A guide to using Healthcare Databases Advanced Search (HDAS)

## http://hdas.nice.org.uk

HDAS gives you access to a set of bibliographic databases, which you can search to find references to journal articles and other published papers. If you find an article from a journal that you have electronic access to through OpenAthens, HDAS will give you a link to the full text of that article.

This guide shows you how to use HDAS. You can use the links in the contents list below to jump between sections of the guide.

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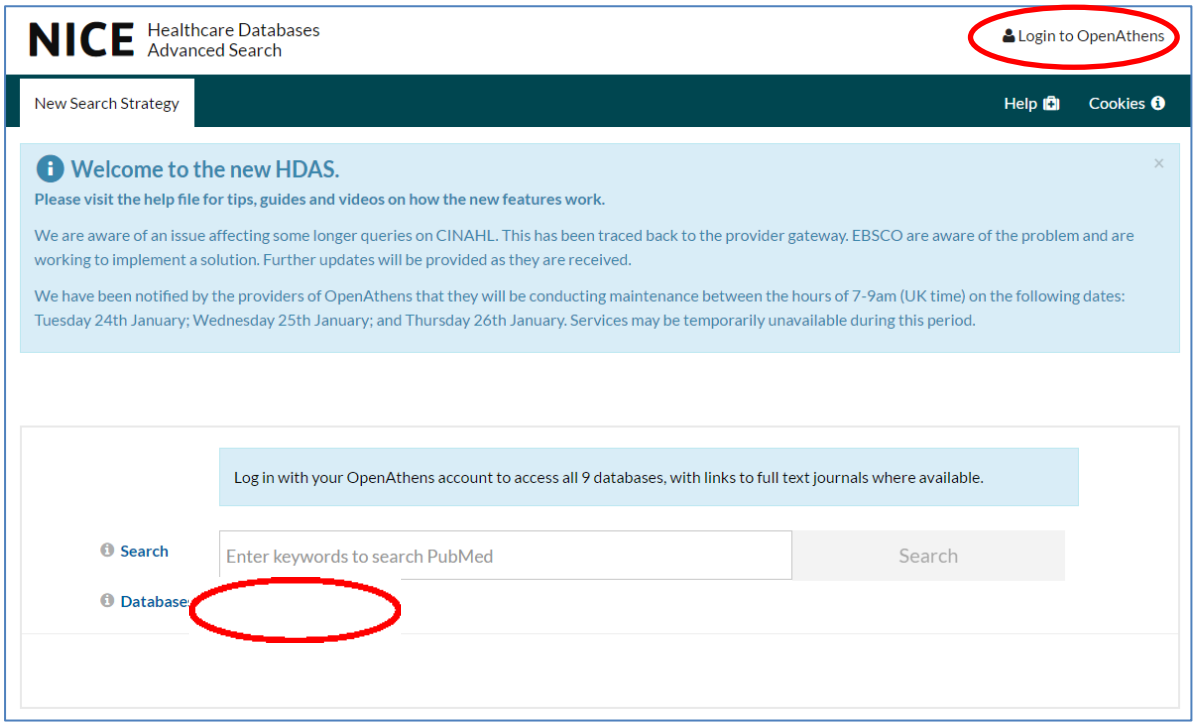
## HDAS – home page – not logged in

Go to http://hdas.nice.org.uk.

You will see a welcome message, which will contain details of any known issues with any of the databases or providers.

From this page, you can carry out a search without logging in. This means that you will only be searching in the PubMed database, and you will not see any links to full text articles.

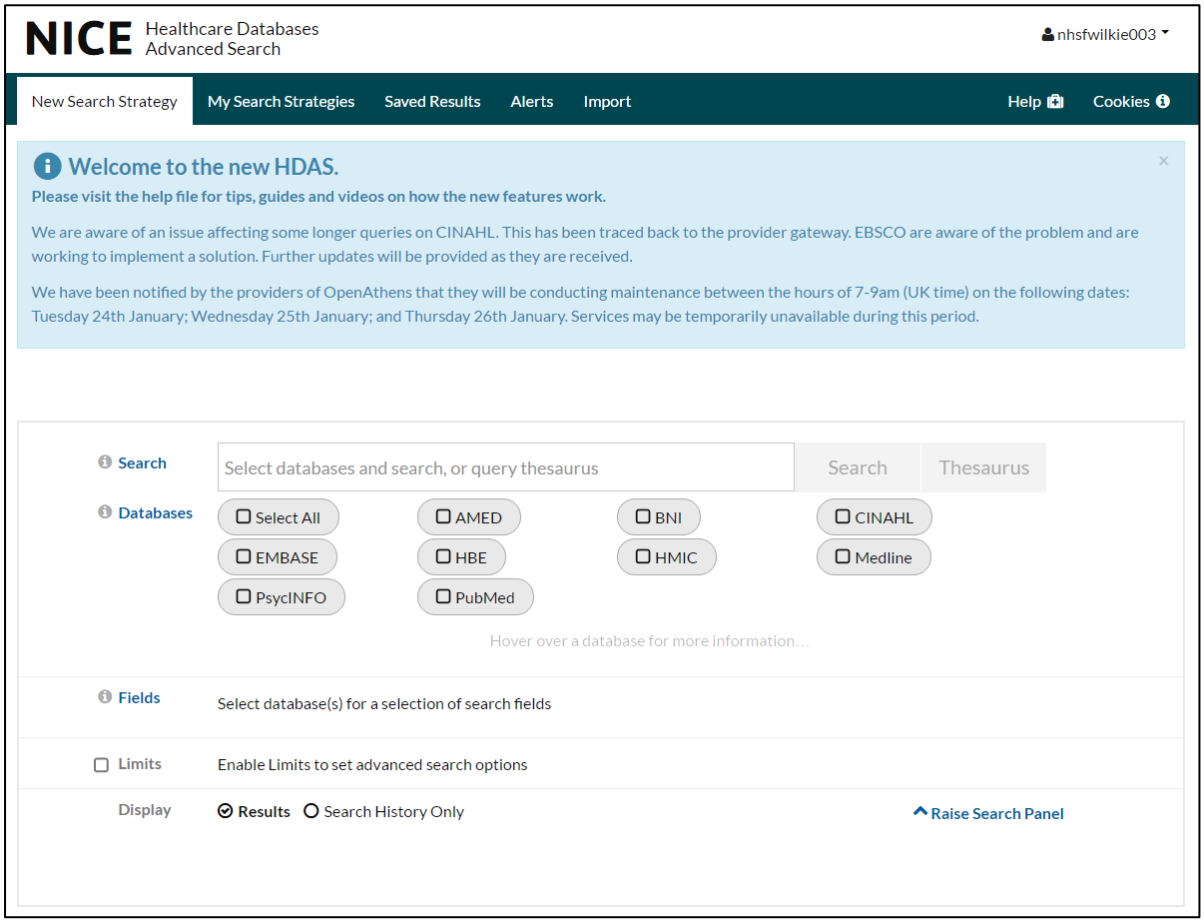
To search the full range of databases with links to articles where these are available, you need to log in with an NHS OpenAthens username and password. You can login from 2 places:




When you click on one of these links, you will be transferred to the OpenAthens login page. Enter your username and password, and you will be transferred back to HDAS.

## HDAS – home page – logged in

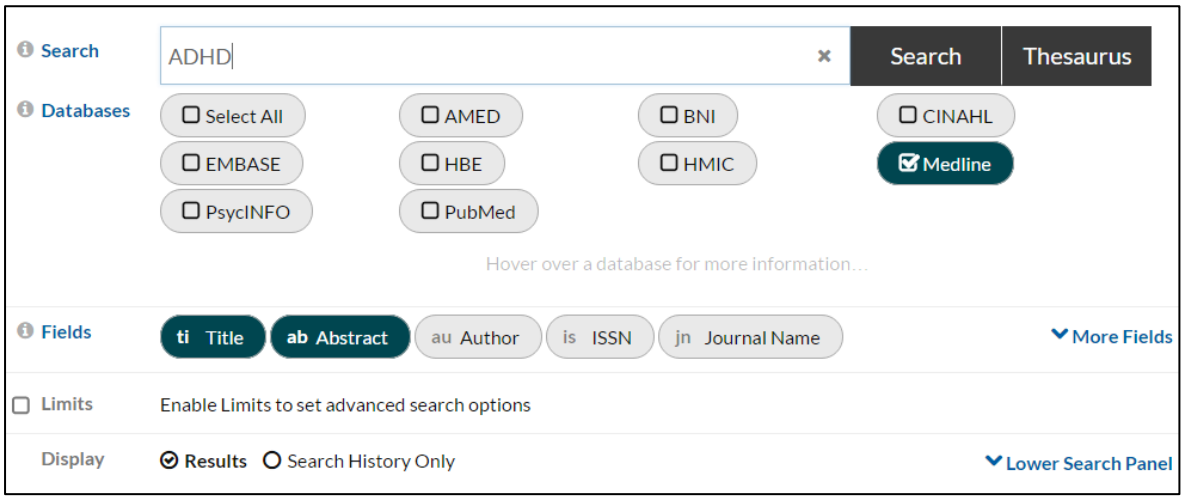
After you have logged in, your page looks like this:



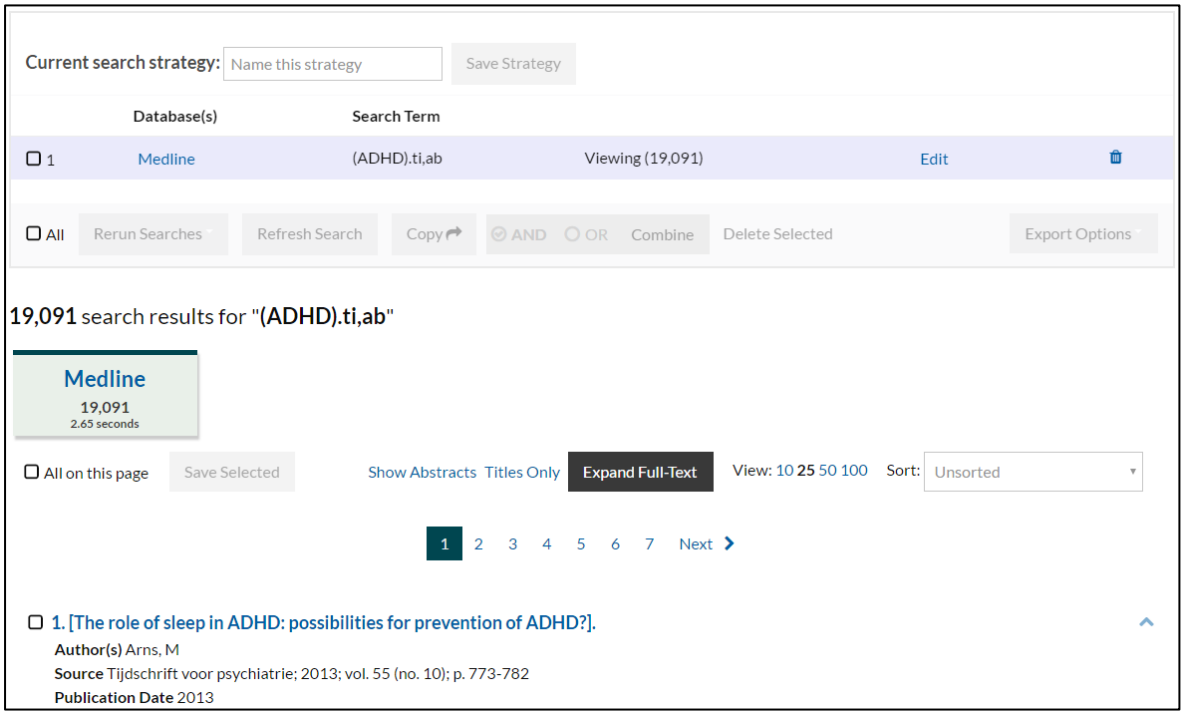
## Carrying out a basic search

To do a basic keyword (free text) search in the title and abstract fields:

- select your database(s)
- type your search terms into the search box
- click the **Search** button (which will now be clickable) or press enter on your keyboard




Your search will run and when it has finished, you will see the following display:




Your search shows as row 1 in your current search strategy, and your results are shown underneath your strategy.

The search box and database selection panel stay on the same web page, above your search strategy. You can choose to move them to below your search strategy by clicking the **Lower Search Panel** link (see page 9).

## Search terms

You can use phrase searching, truncation, wildcard, and proximity searching in the search box. You can also type Boolean operators AND, OR, NOT and ADJ into the box. In the online help, the syntax table shows which symbols and operators can be used, and the searching section shows you how to use them.

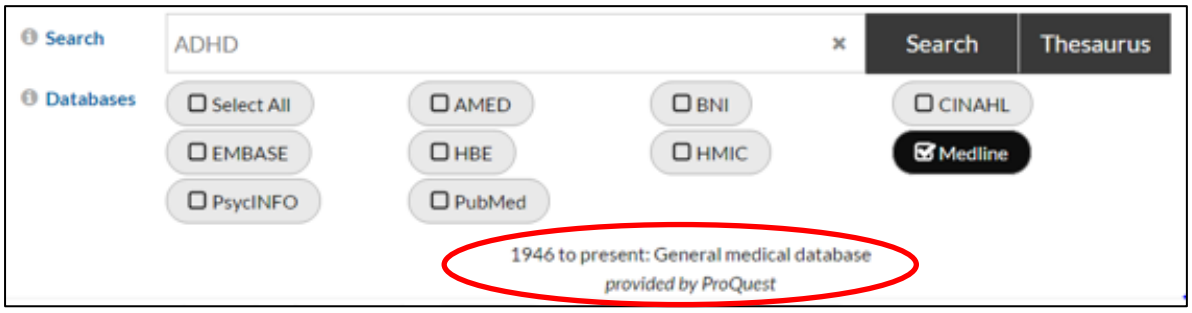
You can see the online help by clicking the information symbol or the word **Search** next to the search box:

The help page will open in a separate tab so that you can keep your search page open as well.

## Databases

If you move your mouse over the name of a database, some basic information about that database is displayed:

- who the database is supplied by
- what years are covered
- its main subject areas.




To find more detailed information about each database, click the information symbol next to the word **Databases** (this will open in a separate tab).

**NOTE**: You can select more than one database to search in at a time, but if you do this, your searching options are then more limited:

- you won't be able to use the Thesaurus
- there will be fewer fields and limits options available
- you won't be able to combine searches carried out in more than 1 database.

## Fields

The field options are automatically set to search Title and Abstract (you will see they are highlighted in a teal colour).

Each database makes different fields available for searching. Common ones are displayed (but are grey until you select them). You can see all the fields available for a database by clicking the **More Fields** link to the right of those displaying.

You can choose additional fields to search in by clicking one or more options – they will become teal-coloured to show that they have been selected.

Each field has a 2-letter code associated with it (eg ti for Title, ab for Abstract). If you know the code for the field that you want to search, you can enter this directly into the search box (eg Smith.au).

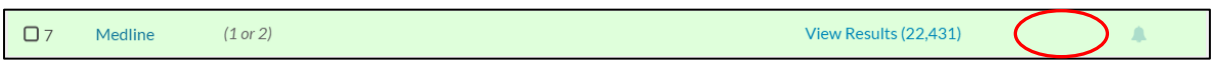
You can set the field options before you carry out a search. Or you can edit the fields on an existing search row (NOTE, you can only do this if the row is not a combined one and doesn't have any other rows dependent on it):

- in your search strategy click on the **Edit** button for the appropriate row:

- click on **Edit Limits**

- the search panel reloads - make your changes in the field options underneath the main search box
- click on the **Update** button:

**NOTE**: you cannot apply fields to a combined search row – the Edit link does not display:




You need to apply fields to the individual search terms and then combine the rows.

## Limits

Limits give you some advanced search options around the types of information you search for, dates to search between, age groups, language, etc. Each database has different limit options, so if you are searching in more than one database at a time, you will only see the limits that are common to all the databases you have selected.

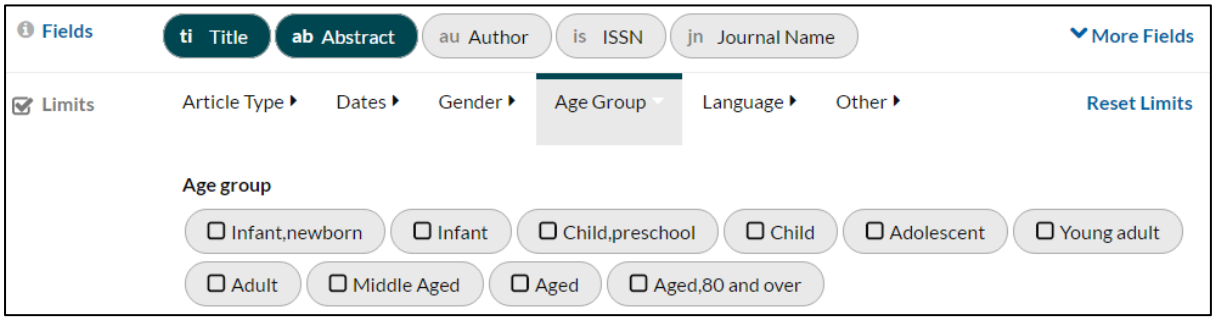
You can apply Limits either before you search, or at the end of your search. **If you are doing a search in which you need to combine rows, you will need to apply your limits at the end of your search.** You can do this by typing the number of the search row you wish to limit into the search box, then choosing your limits before clicking on **Search**.

To apply limits, click in the check box next to the word Limits:

If you haven't already selected a database, you will be prompted to do this.

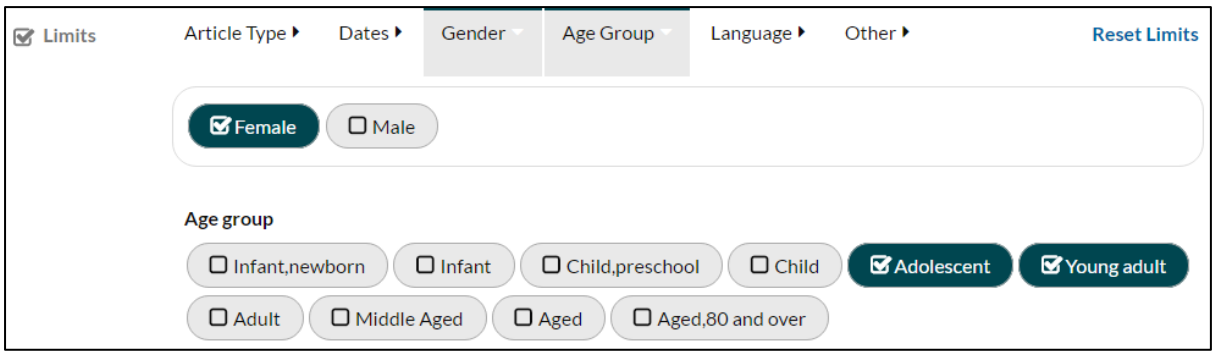
The limits available for your database will then be displayed, grouped into categories:

To select limits, click on a category heading – this will open out the list of limits for that category:




You can then select as many limits from within a category as you like by clicking on them – they will become teal-coloured to show they have been selected.

You can open more than one category at a time – the limit options will display one above another:

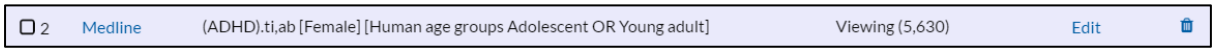


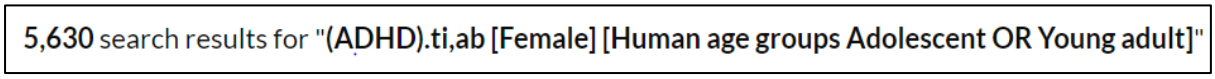

You can close down a category by clicking on the heading again.

If you change your mind, you can clear your selection one at a time by clicking on the individual limits, or you can use the **Reset Limits** link to clear them all at once.

Once you have selected the limits you want, click on the **Search** button to run your search with those limits applied.

The limits you have applied are displayed clearly in your search row and at the top of your search results:



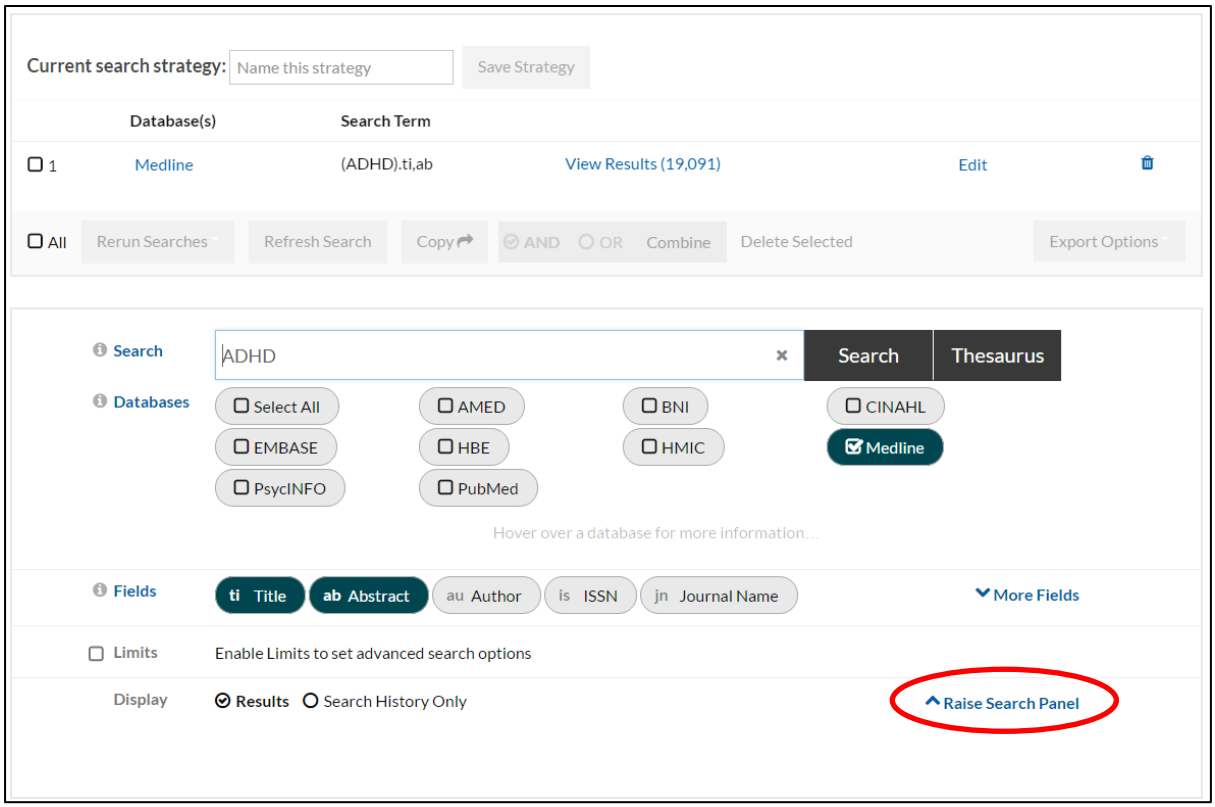



## Lower search panel

The search panel (which contains the search box, database selection, and field and limit options) appears by default at the top of the page, above your search strategy and results. You can choose to move this, if you prefer, so that the search box appears immediately below the last line of your search strategy.

To do this, click on the **Lower search panel** link below the limit options:

This then changes your screen:




You can move the search panel back again by clicking on the **Raise Search Panel** link.

## Thesaurus searching

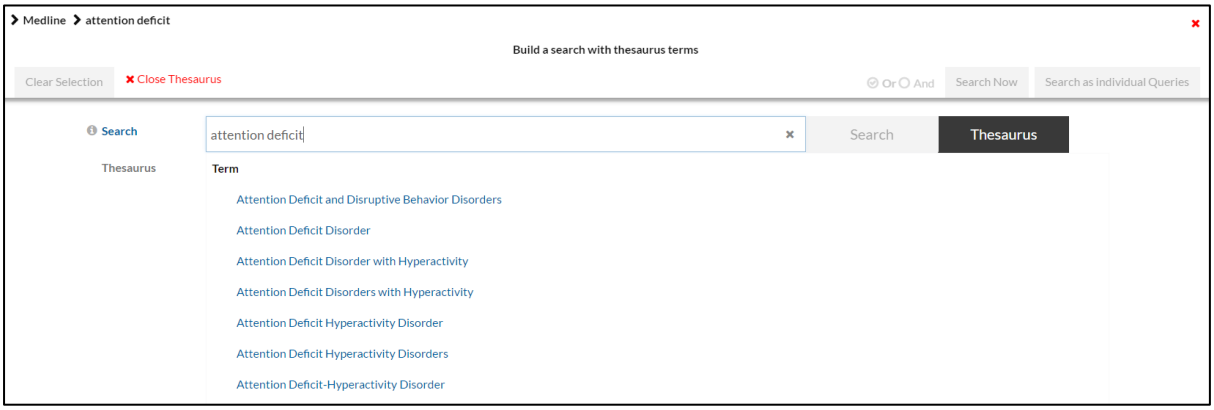
A thesaurus is a list of terms (also called subject headings) that are used to label articles in a database. When you search using the thesaurus, you find results that have been labelled as being about a particular term (rather than just mentioning the search term in passing, or using an alternative term). For example, a commonly used phrase is “heart attack”, but in Medline the thesaurus term for that phrase is “myocardial infarction”. If you only carry out a free-text search for “heart attack”, you may miss many other articles that use “myocardial infarction” or other synonyms such as “cardiac arrest” or “heart arrest”. If you use the thesaurus, you will find articles that use any or all of these terms, and have been checked to make sure that heart attack/myocardial infarction is the focus of the article.

Each database has a different thesaurus, so **you can only use thesaurus searching when you select a single database to search in**.

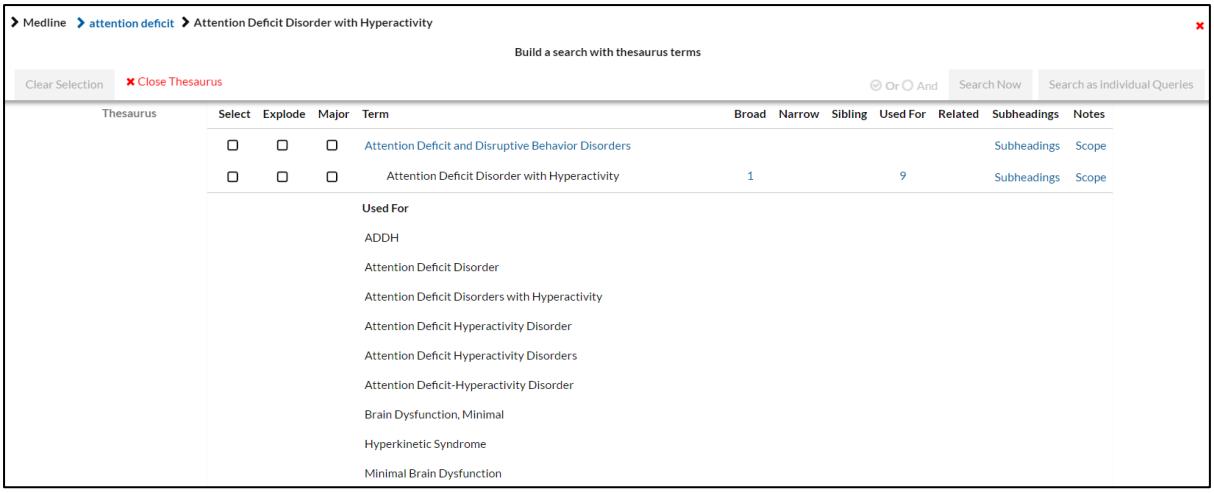
To carry out a search using the thesaurus:

- type your search terms into the search box
- select a single database
- click on the **Thesaurus** button (note, if you have more than one database selected, the Thesaurus button won’t become clickable)

The thesaurus opens and the first thing you see is a list of all the subject headings that contain your search terms:




Click on the one that seems to be most relevant to your search and you will be taken further into the thesaurus:



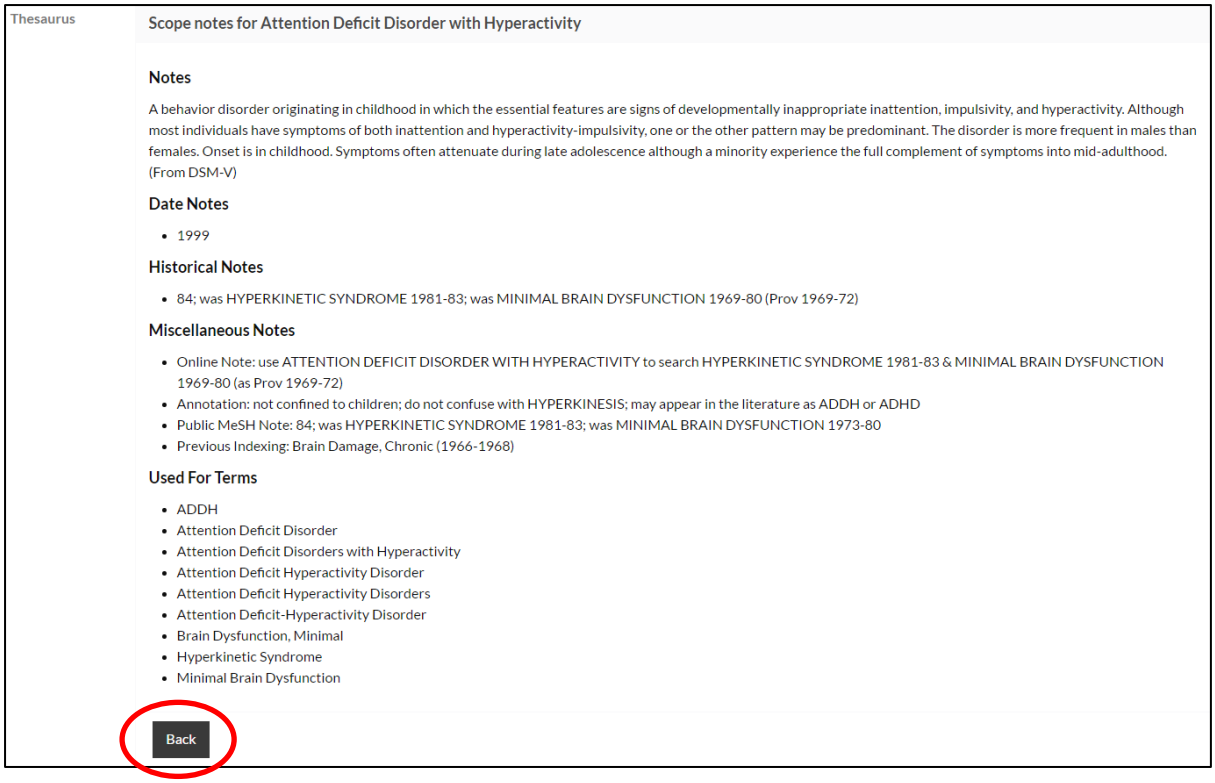

This brings you to a structured view of your chosen term's place in the list. The list of subject headings is hierarchical, with broad categories narrowing down to more specific terms.

The term you have chosen is above the line, but you can also see any broader and narrower terms. **Sibling** terms, where they are available, show any other terms that are listed under the same broader term. The list of **Used For** terms shows you common variations in the way a term might be expressed – these are grouped together under one subject heading.

In this example, the term chosen is **Attention Deficit Disorder with Hyperactivity**. This is a more specific sub-set of the broader term Attention Deficit and Disruptive Behavior Disorders. It is also used to label articles that talk about ADDH, Attention Deficit Disorder, etc.

### Scope notes

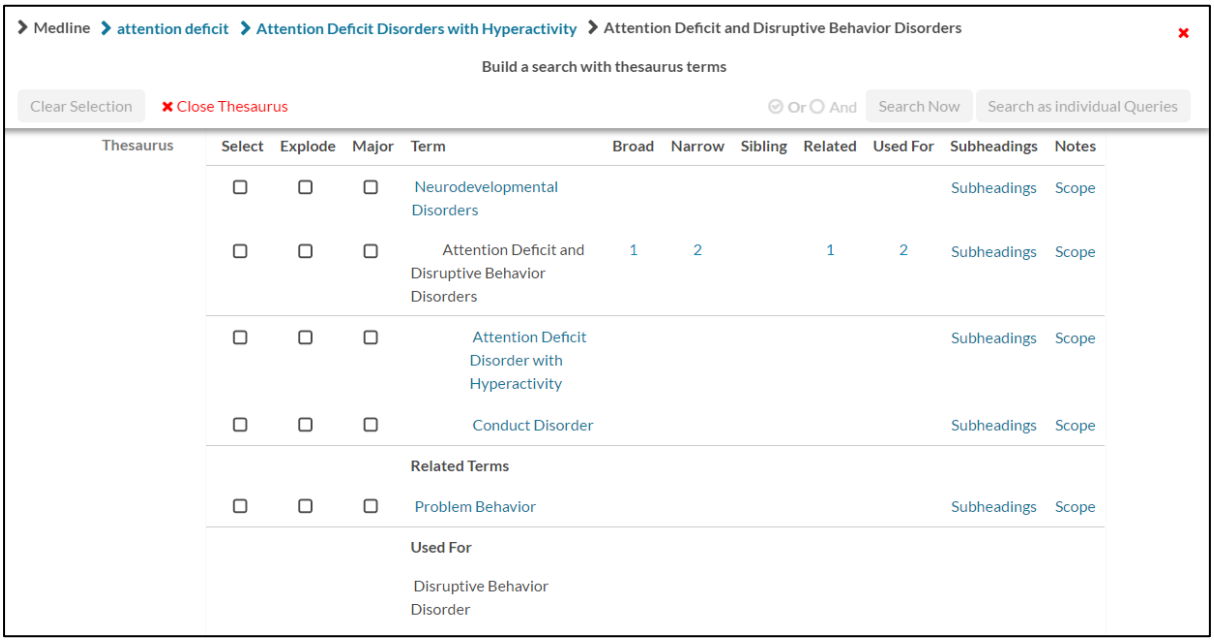
You can check whether the term you have chosen is the right one for your search by looking at the Scope notes – click on the word **Scope** to the right of your chosen term. This opens the notes for you to check:



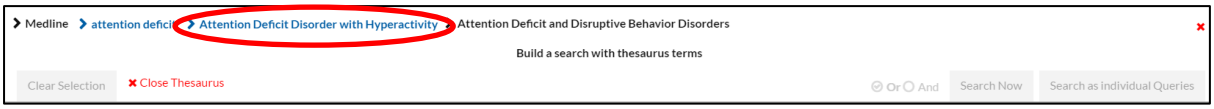

To close the scope notes, click on the **Back** button at the bottom of the notes – this takes you back to the thesaurus.

NOTE: when you close the scope notes, the link in the thesaurus builder changes to say **x notes**, rather than Scope – you can click the **x notes** link to display the scope notes again.

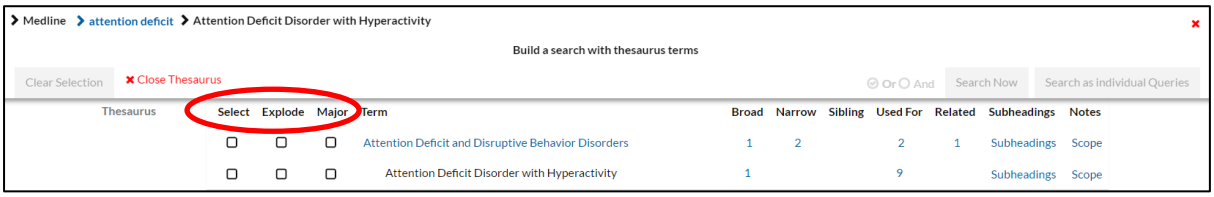
If you decide that you haven't chosen the most appropriate term, you can move around within the thesaurus by clicking any other terms that are blue – this moves you to the view of that term's place in the thesaurus:



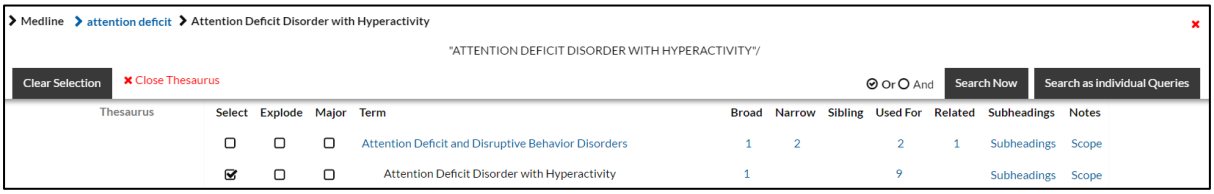
To go back to a term you have already looked at, you can use the breadcrumb trail at the top of the thesaurus screen – just click on any term:




When you have found a term that you want to include, you have some options about what to do with that term (although not all of the databases give you all 3 options) – **Select**, **Explode** and **Major**:




Clicking in the checkbox under **Select** adds that term to your search (you can see it added at the top of the screen:




Choosing **Explode** adds the term you've selected plus any narrower terms under it to the search. This adds the letters **exp** before your search term, to show that you have chosen to explode:

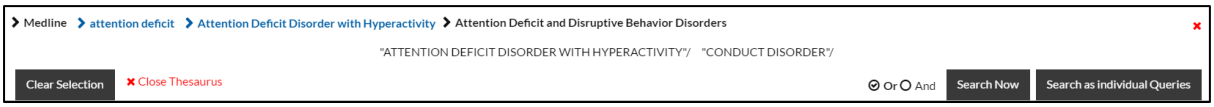
exp "ATTENTION DEFICIT DISORDER WITH HYPERACTIVITY"/

Choosing **Major** gives you only the results that have your chosen term marked as a key or major subject heading. This is shown by an asterisk in front of your chosen term:

*"ATTENTION DEFICIT DISORDER WITH HYPERACTIVITY"/

You can choose to select, explode and major all at the same time, by clicking in all 3 boxes.

You can select/explode/major more than one term at a time – you'll see your selection build up at the top of the screen:

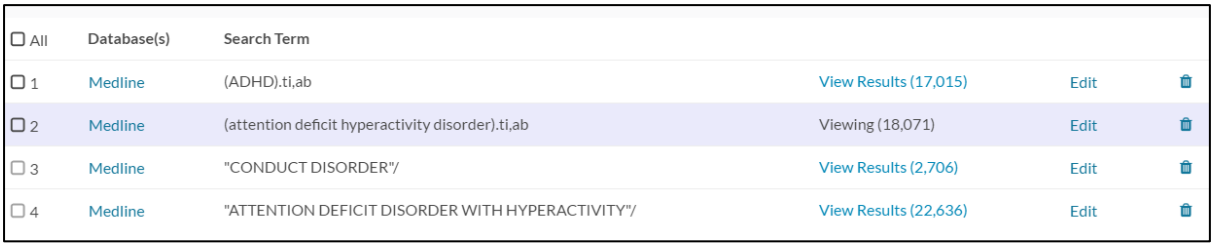



You can unselect terms either one at a time by clicking in the check boxes again, or all at once by using the **Clear Selection** button.

Once you have made your selection, you can run your search in one of two ways:

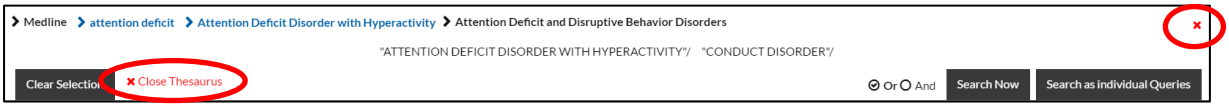
- you can **Search Now** – which will run one search with all your chosen terms combined using OR or AND (you select by clicking the buttons) – this will display in your search strategy as one row
- you can **Search as Individual Queries** – which will run separate searches for each term you have selected – these will display in your search strategy as separate rows.

When you have chosen a search option, your search runs and then you will be taken to your search strategy. You will see searches using thesaurus terms display slightly differently:




Thesaurus searches have the search terms shown in capital letters, with phrase marks around them and a slash (/) at the end of the term.

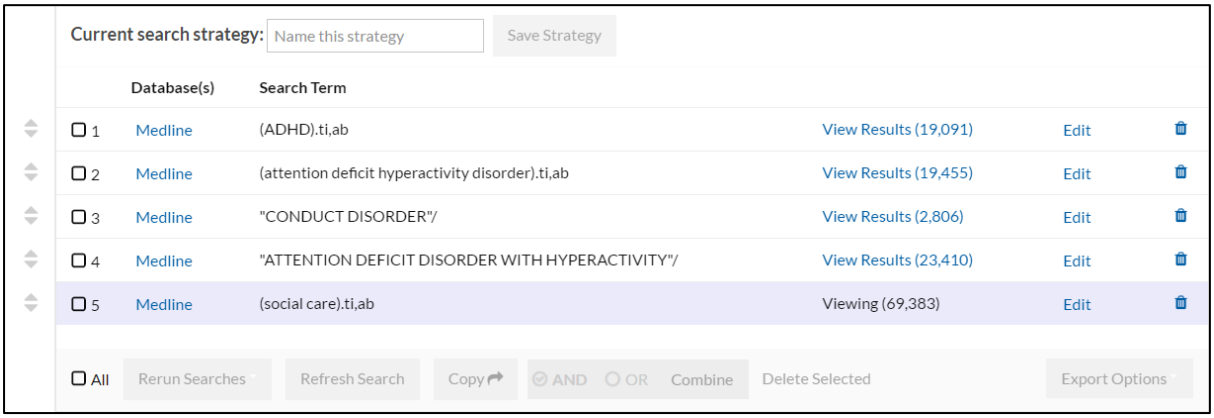
The thesaurus stays open until you choose to close it, so if you want to carry on searching using your own free-text terms, you will need to scroll to the top of the screen and close the thesaurus using either the red cross in the top right hand corner, or the **Close Thesaurus** link:




If you want to carry out another thesaurus search, you can just enter a new term in the main search box and click on the **Thesaurus** button again, without closing the thesaurus first.

## Search strategy

You build up a search strategy by carrying out additional searches: type your next term into the box and click to search or use the thesaurus – you will see it appear as the next row in your search strategy:




Once you have a search strategy, there are a number of things you can do with it: combine rows, delete rows, re-order or move rows, edit rows, rerun rows, refresh your search, copy rows, and save the whole strategy.

### Combine search rows

You can combine search rows in 2 different ways – by using the Combine button, or by typing into the search box.

**NOTE 1**: you cannot combine search rows that have been carried out in more than 1 database with any other rows.

**NOTE 2**: you cannot combine search rows carried out in 1 database with rows carried out in a different database.

To combine using the button:

- click in the checkboxes of the rows you want to combine
- the **Combine** button then becomes clickable
- choose to combine with either **And** or **Or** by clicking next to your choice

- click on the **Combine** button

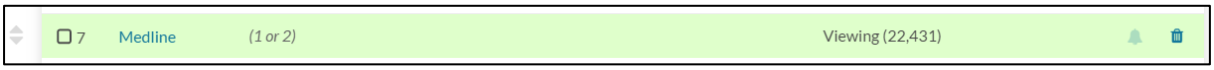
To combine a row by typing in the search box:

- type your row numbers with and/or in the search box, for example:

  1 or 2

- click on the search button or press enter on your keyboard.

Whichever way you combined, you then see a new row in your search strategy:




**NOTE 1**: combined rows are coloured green to make them stand out in your search strategy.
**NOTE 2**: You cannot edit a row that is a combination of 2 other rows.

## Delete search rows

You can delete rows from your search strategy in 2 ways: using the Delete Selected link at the bottom of your strategy, or using the bin icon at the end of each row.

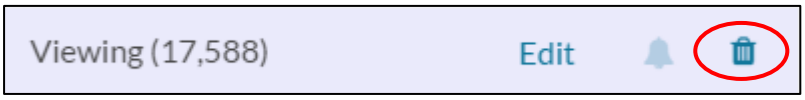
To delete rows using the link:

- select the row(s) that you want to delete by clicking in the checkboxes next to each row – you can delete as many as you like in one go
- click on the **Delete Selected** link
- the link changes to a red button that says **Confirm** - click on **Confirm** to delete the rows*
- the row(s) will disappear from your search strategy.

*If you change your mind, you can just do nothing – the Confirm button disappears after a couple of seconds.

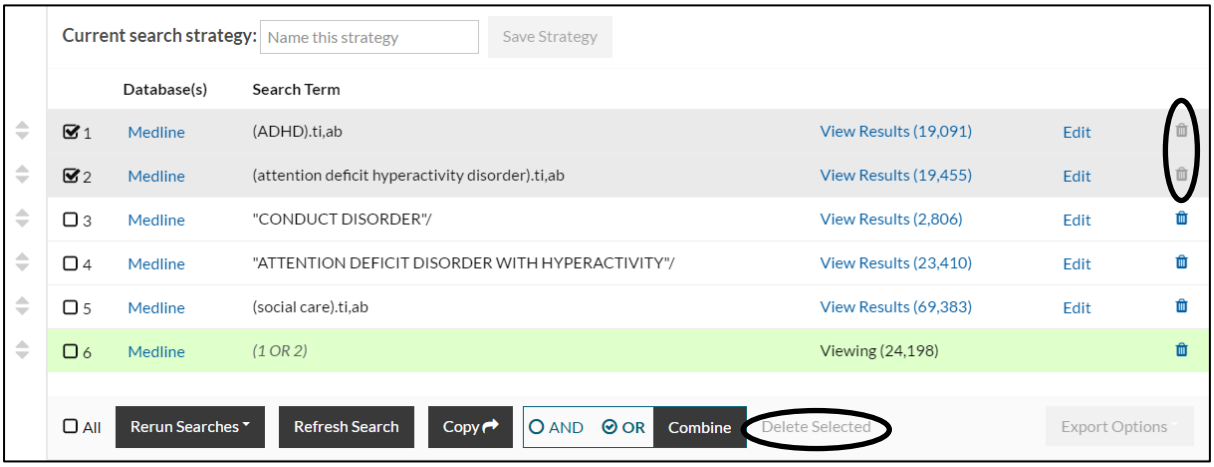
To delete rows using the bin icon:

- click on the bin icon at the end of a search row:




- the icon changes to a red button that says **Confirm** - click on **Confirm** to delete the row
- the row will disappear from your search strategy. This cannot then be retrieved later.

**NOTE 1**: you cannot delete a row which has another row that is dependent on it. In the example below, row 6 is rows 1 and 2 combined – so row 6 is dependent on rows 1 and 2. This means that the bin icon at the end of rows 1 and 2 is greyed out (it isn't clickable), and if you select rows 1 and 2, the Delete Selected button is not activated (it remains grey). If you want to delete rows 1 and/or 2, you would first need to delete row 6.



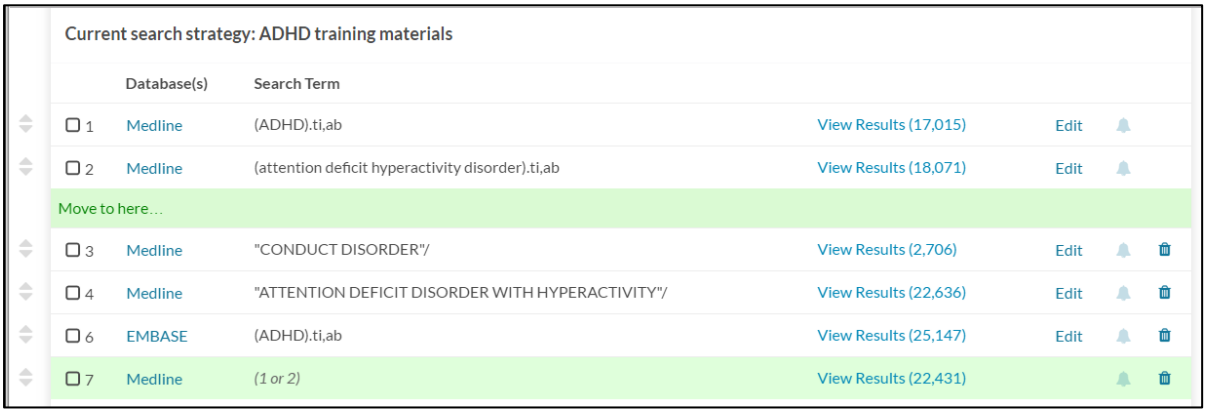

**NOTE 2**: if you delete a row from your strategy, the other rows are not re-numbered. So if you choose to delete row 3 for example, your search strategy would just show rows 1, 2, 4, 5, etc. You can copy your search if you want to see your strategy with a logical number order.

## Re-order search rows

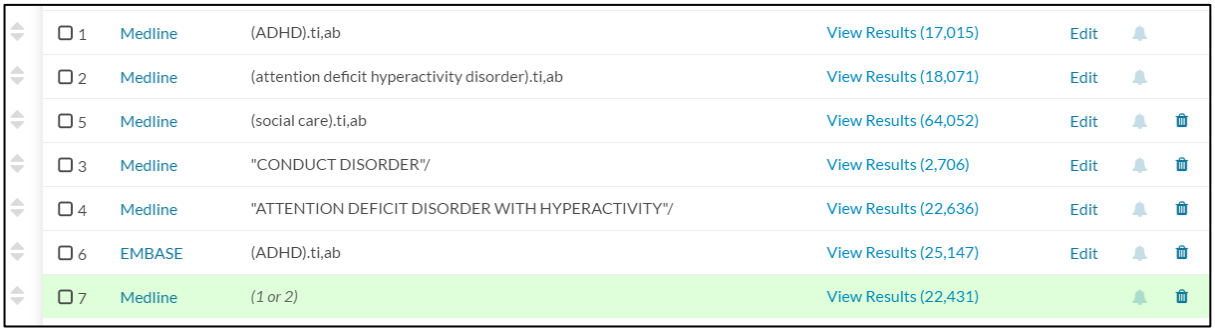
You can move a row up or down in your search strategy if you decide you want to order your search strategy differently.

To move a search row:

- click on the grey arrows to the left of your row number and hold your mouse button down
- holding the mouse button down, drag your mouse diagonally up or down to the position you want to move the row
- you will see a green row inserted saying **Move to here…**




- let go of your mouse when it's over the words **Move to here…**, not over the grey arrows (otherwise it won't move the row)
- you will see your row in its new position – in this example, row 5 has been moved to come after row 2:




NOTE: your rows will not be re-numbered – they keep their original numbers, so the row numbers will appear out of order.

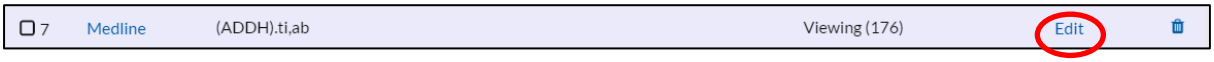
## Edit a search row

Editing a search row allows you to make changes to that row without having to create a new search row. This is particularly useful if you have made a spelling mistake, for example, or want to change the database that you searched in.

**NOTE**: you cannot edit a combined row.

To edit a search row:

- click on **Edit** on the right hand side of your selected row:




- this then reloads the search line with your editing options:

- you can choose a different database by clicking in the checkboxes next to the one you want
- you can correct your spelling (in the example above, ADDH has been typed instead of ADHD) – just click in the box to amend
- click on the blue **Update** button your search will re-run and the new details will show in your search strategy, with the same row number.

You can also use the Edit function to add or amend any fields or limits to the row. Once you have clicked on **Edit** for your chosen row, click on the **Edit Limits** link. This takes you back to the search panel, where you can select or amend your limits.

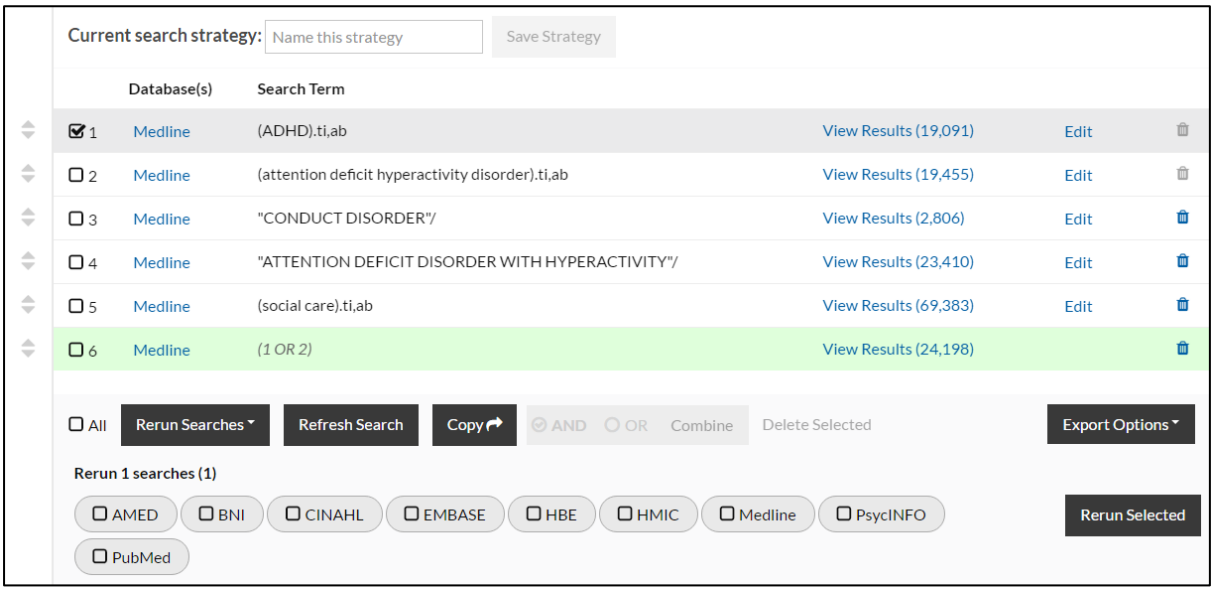
**NOTE**: the **Edit Limits** option is not available if the row you want to edit has another row dependent on it (if, for example, you have combined that row with another).

## Rerun searches

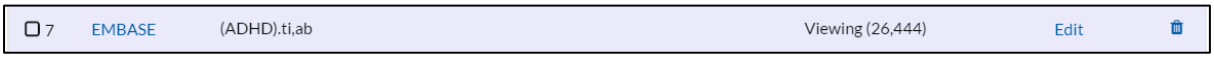
This option allows you to take an existing row in your search strategy and get results for the same search from a different database.

To rerun a search:

- select a row from your strategy by clicking in the checkbox next to the row number (you can rerun more than one row at a time, either by clicking several checkboxes, or by choosing All)
- the **Rerun Searches** button becomes clickable – click on the button
- the list of databases opens underneath:



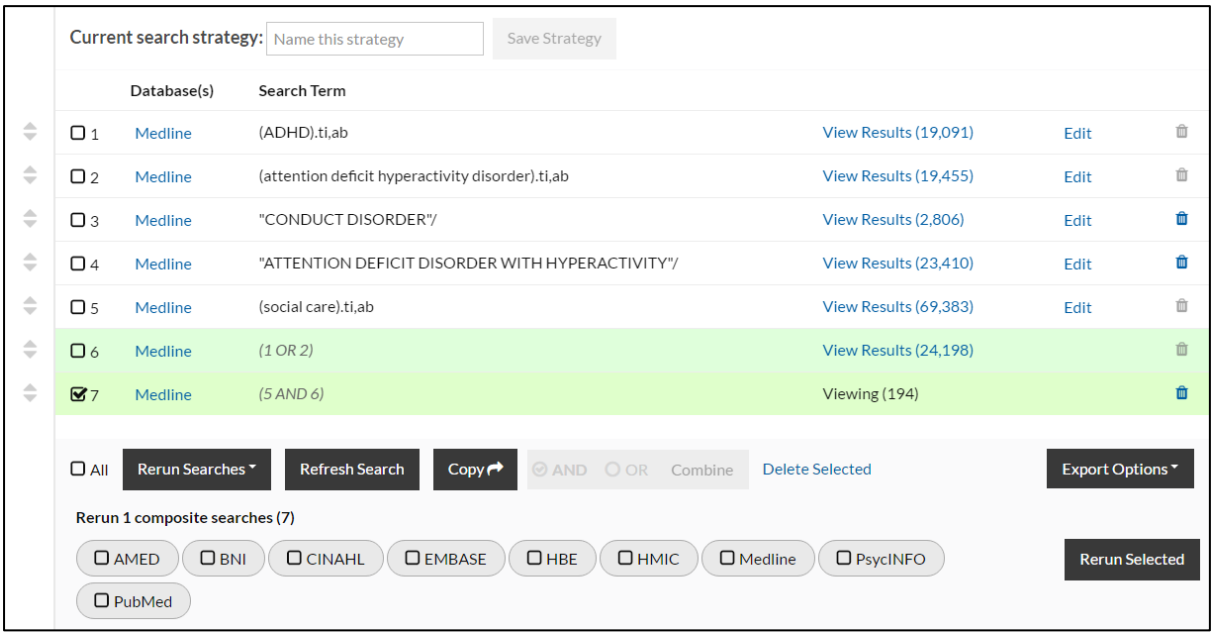

- select the new database by clicking next to it
- click on the **Rerun Selected** button to the right of the database list
- you will see a new row appear in your search strategy, which shows the search you selected in the new database:




**NOTE** – if you clicked the **Rerun Searches** button and then change your mind about rerunning your search, you can click on the **Rerun Searches** button again to close down the options and return to your search strategy.

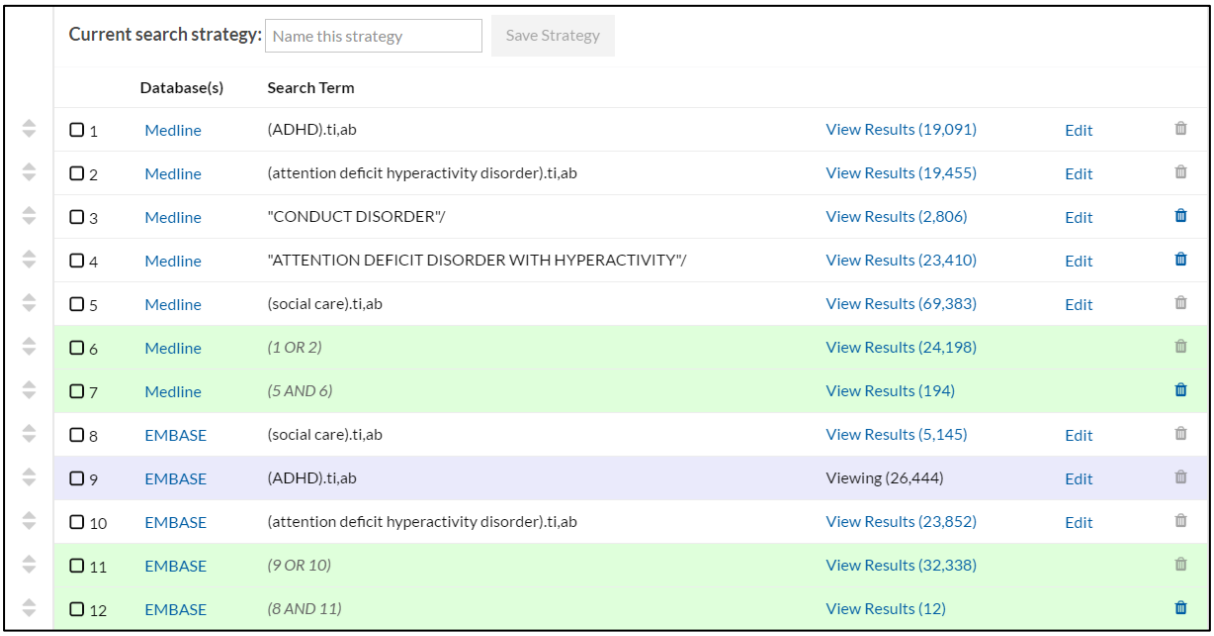
### Rerunning combined rows

If you've created a strategy with combined rows, then you only need to select the final combined row you've created to rerun. HDAS will automatically recreate all of the other rows it needs to successfully rerun your strategy in your new database.




In the example above, a simple combined row has been created (row 6). This has then been combined with row 5, making a nested combined row (row 7). To rerun this strategy in a new database, you only need to select row 7. Doing so recreates all the necessary rows in the new database.

- Select row 7, then click the **Rerun Searches** button
- choose your new database(s)
- then click on the **Rerun Selected** button
- your strategy will refresh, and show the search rows replicated in the new database:

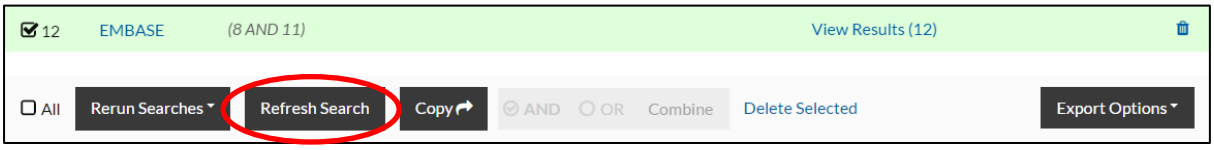



**NOTE**: all of the existing rules around syntax, fields and limits still apply. If one of these rules is broken, for example if a field label is different in the new database, the system will provide a syntax error message prompting you to review the syntax.
Similarly, if you rerun a search with thesaurus terms, if that thesaurus term does not exist in the new database, the database provider will return zero results.

## Refresh Search

The refresh search option allows you to re-run all the searches in a strategy. This means that if you access a strategy that you haven't run recently, you can make sure that you are looking at the very latest results, without having to manually refresh each row.

Use the checkboxes to select the row(s) you want to refresh, then click on the **Refresh Search** button:




You will see that the searches are refreshing, as the word Running will appear next to View Results in each row.

**NOTE**: if you have a search row that is a combination of other rows, you can just select that row to refresh – clicking the Refresh Search button will automatically refresh the other rows as well.

## Copy search rows

You can copy one or more rows from a search strategy into another search strategy.

To copy a search strategy:

- select the row(s) of your search that you want to copy by clicking in the checkboxes next to the row number (or use **All** to select them all)
- the **Copy** button becomes clickable – click on the button

- you then have several options for where to copy your search rows to:
    - a new search strategy
    - an existing saved search strategy
    - an unsaved search strategy

- choosing a **new search strategy** creates a brand new strategy, populated with the rows you've selected. This can be useful if you have deleted rows and want to see your search with a logical number order. [For example, if you've deleted rows, your search strategy might display row numbers 1, 2, 5, 6, 7. This option would give you a copy of your search strategy with the rows numbered 1-5.]
  You will be taken to the new search strategy.

- choosing to copy your rows into an existing saved strategy adds your selected rows to the end of the strategy you choose

- choosing to copy your rows to an unsaved search strategy can be more difficult, as you may have a large number of unsaved search strategies, which are only identifiable by date/time. The full list of unsaved search strategies available to you is hidden by default – you can click to open it out.

**NOTE**: if you choose to copy and then change your mind, you can click on the **Copy** button again to close down the options and return to your search strategy.

## Saving a search strategy

Each time you make a change to your search strategy, or add a new row, your strategy is autosaved. This means that if there is a system problem, or you have to stop working in the middle of your search, you won't lose your work. These autosaved search strategies are kept in the system for 28 days before being automatically deleted.

There is also the option to save your search strategy with a name of your choice. These named strategies are kept in the system until you choose to delete them. Saving your strategy means that you can come back to it at any later date and carry on working with it. Giving them a name also makes it easier for you to find them (see Accessing Saved Search Strategies for details on how to find them once they have been saved).

In addition, saving your strategy gives you the option to set up Alerts.

To save the strategy you are working on:

- type a name into the box above your strategy:

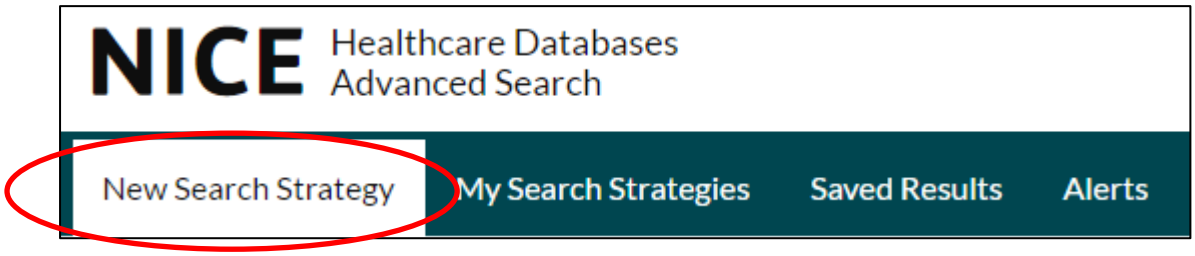
- click on the **Save Strategy** button (which will have become clickable)
- you will see a brief message saying it has been saved
- the box and Save Strategy button are no longer available:

- any changes you then make to your search strategy, or additional search rows you add, will be saved automatically under that name.

**NOTE:** the system won't let you give 2 strategies the same name. If you try to save a strategy with a name you've already used, you will see a brief message that the **Name is in use**. If this happens, you can amend the name in the box, and then click on **Save Strategy** again.

## New Search Strategy

You can start a **new search strategy** at any point by clicking on **New Search Strategy** at the top of the page:

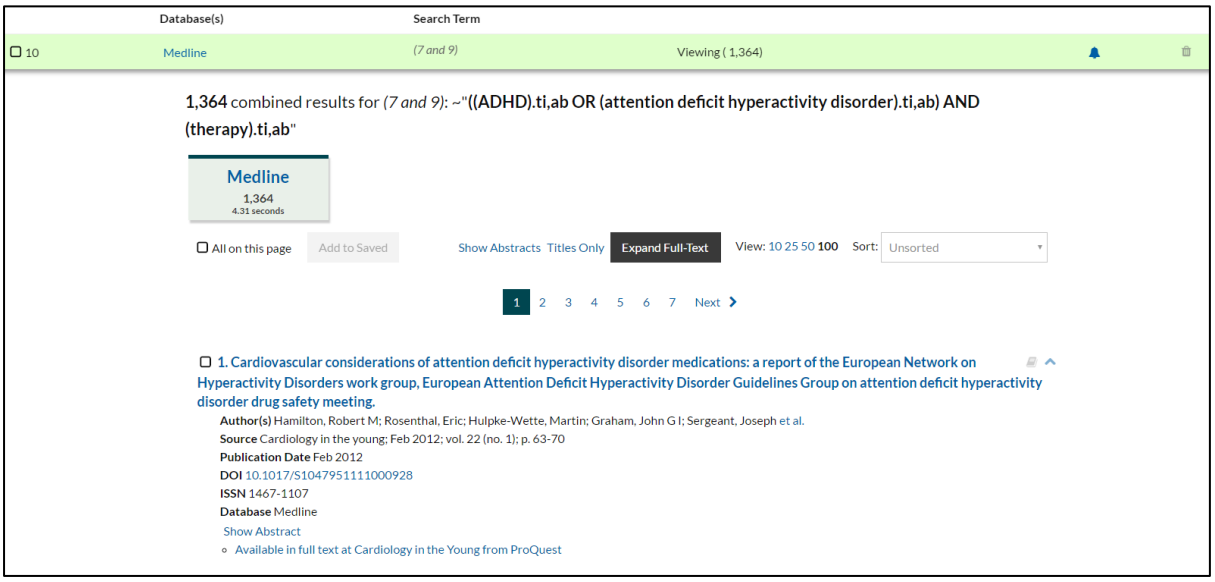



This will replace any strategy you were previously working on. If you hadn't saved your previous strategy, you can still find it by going to My Search Strategies.

# Results

You can display the results from any row in your search strategy by clicking on the words **View Results** in that row:

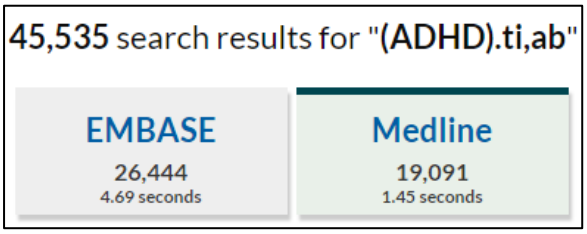
Your results display below your search strategy (and below the search panel if you have lowered it). As you scroll down the page beyond the search box, the line of your search strategy that you are viewing the results from will always pop up at the top of the screen:




You can click the **Back to top** button in the bottom right hand corner of your screen to jump back to the top of your search strategy.

At the top of your results, your search query is displayed in full so that you can see exactly what search your results are for.

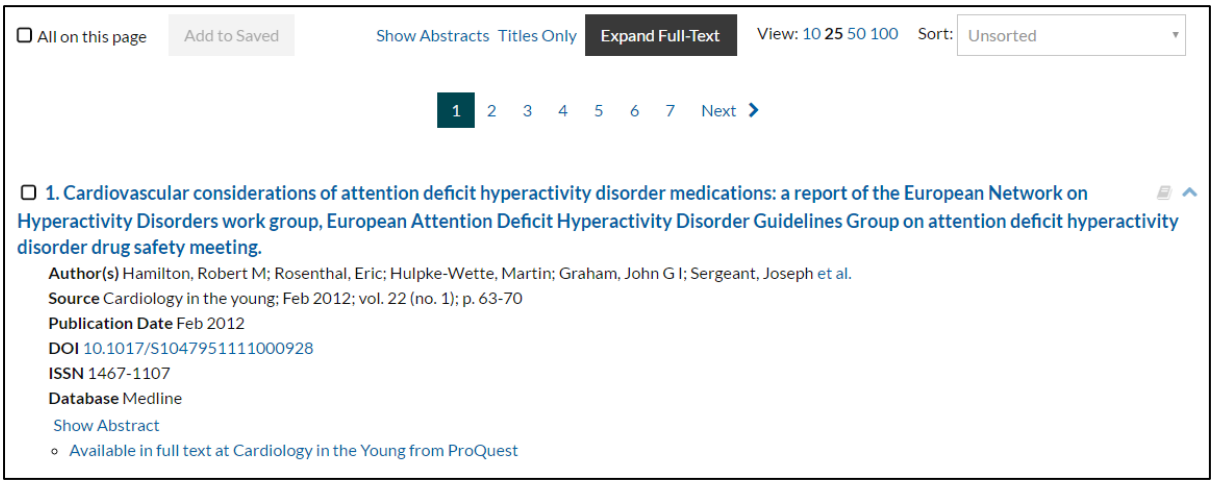
If you have searched more than 1 database at a time, the results from each database are grouped together in separate tabs, showing how many results are from each database:




You view the results from each database separately by clicking on each tab (the tab with the teal-coloured line at the top is the one that you are currently viewing).

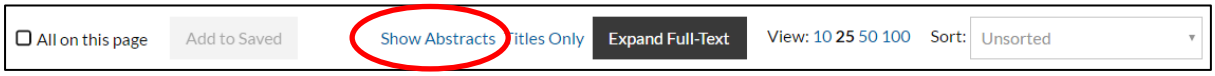
## Results display options

The default settings are to display 25 results on a page, with the title and bibliographic details such as authors, journal, publisher, publication date, etc for each result. If a result has a link to the full text of the paper, this will display as well:




- **Abstracts**
  If a result has an abstract available, you can view it by clicking on the **Show Abstract** link below the result.

  Or, you can choose to show the abstracts for all results by clicking the **Show Abstracts** link at the top of the results:




  If you want to hide all the abstracts again, click on the **Hide Abstracts** link.

- **Titles only**
  You can also choose to just display the titles for each result, by clicking on the **Titles Only** link at the top of the results:

  To display the results with the details again, click on the **Show Details** link.

- **Expand full-text**
  Clicking the **Expand Full-Text** button changes your results display so that you only see the default level of detail for results that have a full text link. For results that don't have a full text link, just the titles are shown. This enables you to quickly scan your results for those that you can get as full text papers.

- **Number of results displaying per page**
  You can choose how many results to display at a time by clicking on the number options next to the word **View**: - the choices are 10, 25, 50 or 100 (25 is the default option). It takes a short while for the page to reload with the new number of results.

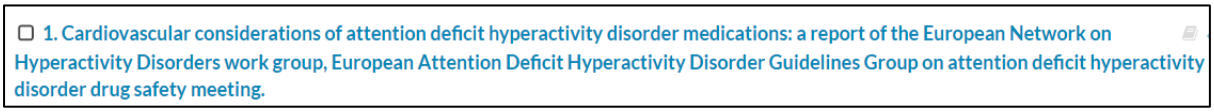
- **Sort**
  The results display in whichever order the database provider supplied them – this is different for different databases. Some send them in date order, with the most recent first. Some send them in order of relevancy.

  If a database has different sort options available, you can see them by clicking in the **Sort** box and clicking on the alternative. This will then reload your results page – you may need to wait a short while for the page to reload.

  NOTE 1: HDAS only displays the sort orders for each database that is given by the database provider. You can find additional sort options if you save your results.
  NOTE 2: if you change the sort order, that option will be kept for any new searches you carry out in the same database in the same search strategy.

## Viewing individual results

You can see the full details for any **individual search result** by clicking on the blue title link:




This then changes your results display so that you are viewing all the details for that result:

You can print these individual results by clicking on the print icon in the top right hand corner.

You can choose to work through your results like this one at a time by clicking on the **Next Result** or **Previous Result** buttons at the top of the screen.
Or you can go back to your whole set of search results by clicking on the **Back to Results** button in the top left hand corner of the screen.

## Saving results

Once you have a set of results, you can look through them and select the ones you want to save as a set of Saved Results. Saving your results allows you to export or download just the ones that are most relevant to you. You also need to save a set of results if you want to combine the results from more than 1 database or search and see everything together in one place. See the section on accessing saved results for how to find them once you've saved them.

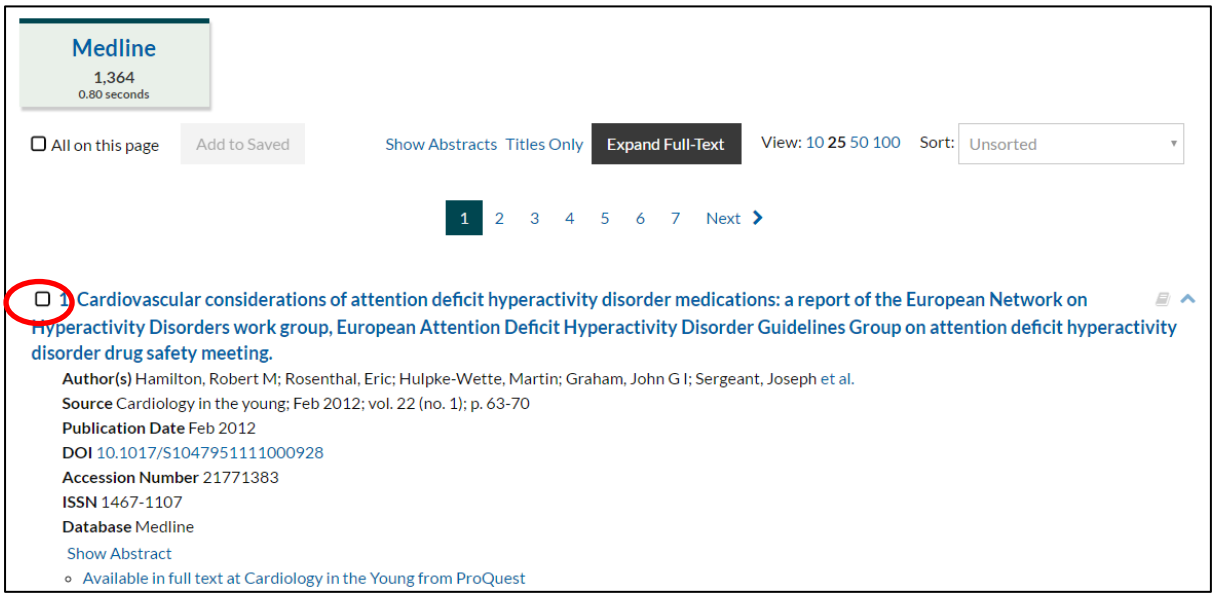
To make your results easier to find, it is best to save your search strategy before you save your results – that way your set of results is given the same name as your search strategy.

If you haven't saved your strategy first, your results set will be given a search strategy number and date.

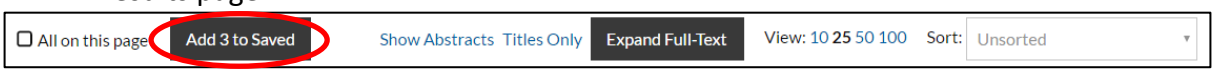
You can only save results from one page at a time, so you might want to change the number of results displaying on a page.

To save results:

- click in the checkbox next to a title

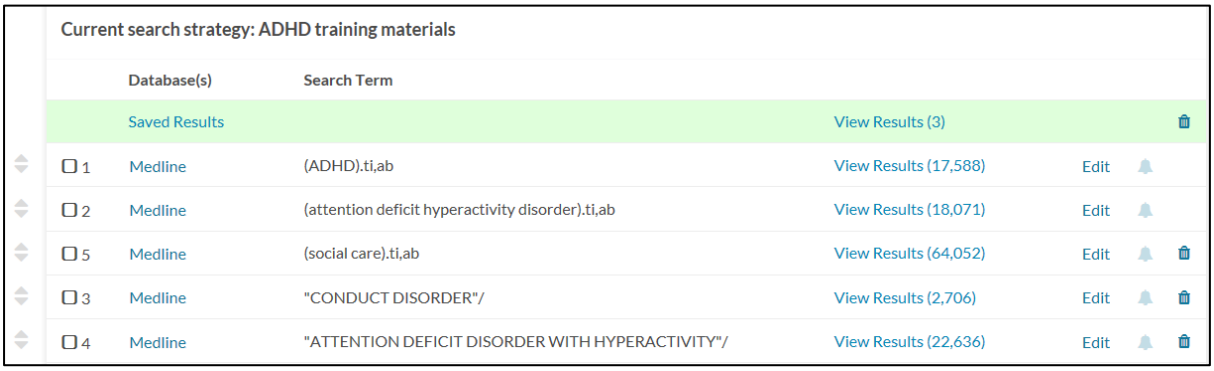



- you can select as many as you like from the page of results you are looking at – you can see how many you have selected on the button at the top or bottom of your results page:




- or you can choose to save all the results on a page by clicking in the checkbox next to the text **All on this page:**

- once you have made your selection, click on the **Add n to Saved** button (where n is the number you have selected)
- you get a brief notification that they have been saved – the button turns grey and says **Saving…**, then says **Saved** before changing back to say **Add to Saved**
- you can then move on to your next page of results, make your selection from that page and add them to the same set of saved results in the same way
- similarly, if you have results from more than one database, you can change database by clicking on the database tab at the top of your results, then make a selection and add them to your set of saved results
- you can add results to your saved set from any line of your search strategy in the same way
- you will see a new line added to the top of your search strategy that shows how many results you have saved in that set:




**NOTE**: if you try to save the same result more than once, the system will only save it once in your set of saved results. This might occasionally mean that the number of results shown as saved is slightly lower than the number that you think you saved.

## Accessing saved results

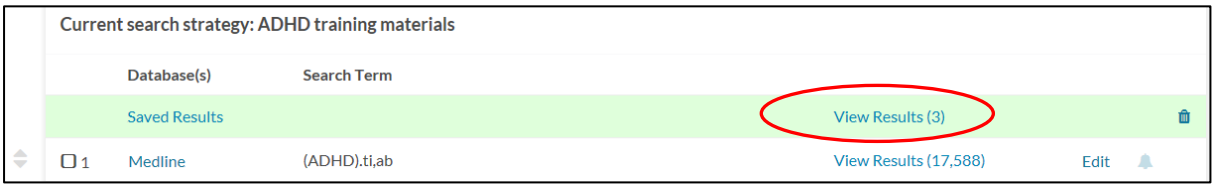
Any results you save with a named search strategy are kept in the system until you decide to delete them, so you can access them and carry on working with them at any time.

If you have saved results without saving your search strategy, then they will be saved for 28 days, which is how long autosaved strategies are kept.

There are 2 ways to access your saved results: from within the search strategy you are working with, or from the **Saved Results** link at the top of the page.

To access your saved results from the search strategy you're currently working in:

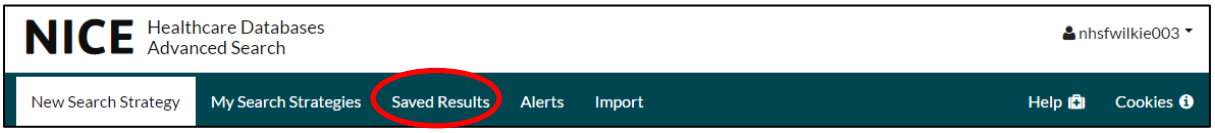
- scroll to the top of your search strategy
- click on the **View Results** link in your Saved Results row



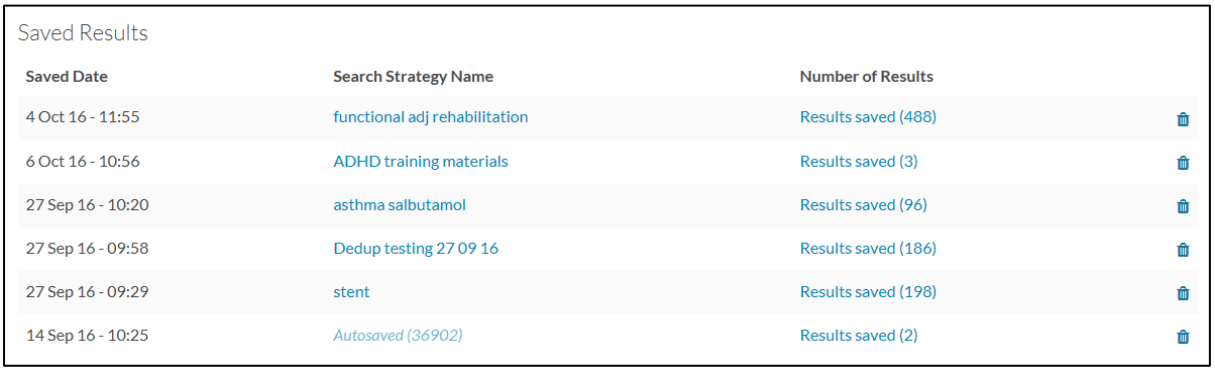

- your results will then load below your search strategy.

To access your saved results from the Saved Results link:

- click on the Saved Results link at the top of the page:




- this then opens a list of all your sets of saved results:




- click on the **Results saved** link on any row to go directly to that set of saved results
- you can then carry on working with your saved results – sorting, exporting, etc.

NOTE: you can delete sets of saved results by clicking on the bin icon at the end of a row.

### Working with your saved results

Once you have a set of saved results, you can work with that set in the same way you do a set of results direct from a database – you can view more detail, etc.

You have some additional options with saved results: you can view more on a page, sort them in different ways, and deduplicate them.

- **Number displaying on a page** – you can increase the number you see on a page to 500 and 1000 in sets of saved results.
- **Sorting** – you can sort your saved results by date and title.

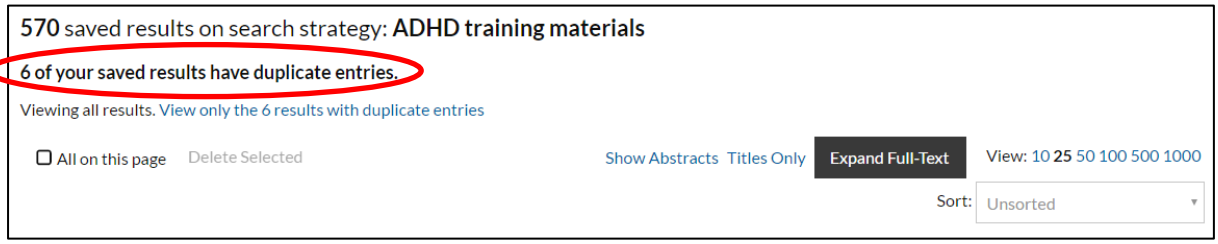
## Deduplication

If you are saving results from more than 1 database, you might find that you are saving duplicate results. This happens because different databases may index the same journal articles, so your search retrieves the article from each database that you search.

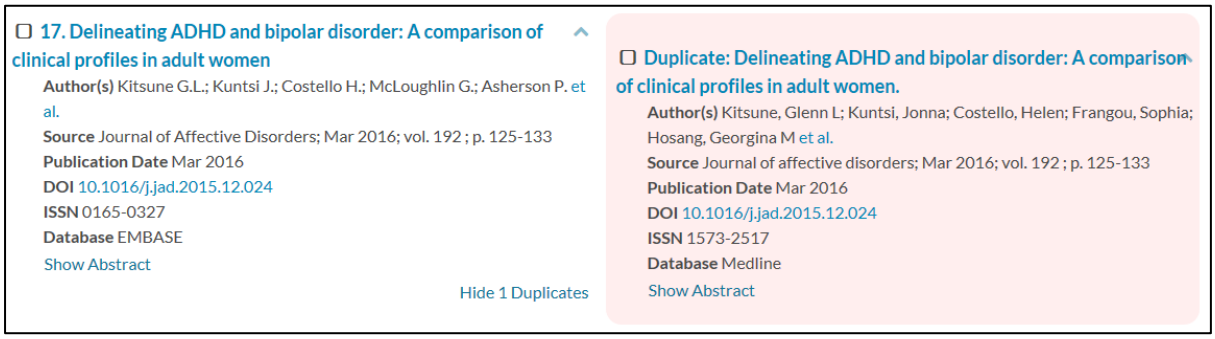
HDAS offers you the option of deduplicating your sets of results. It doesn't do this automatically for you. The HDAS system identifies duplicates by looking for matches in 2 fields – PubMed ID, where this is available, and the title . Exact matches on the PubMed ID mean the documents are identified as duplicates. When the titles are used, HDAS takes 2 titles and calculates the number of changes needed to make them identical. This gives us a percentage match for the documents. Anything which is over 90% similar is flagged as a potential duplicate. Occasionally the databases have the details entered incorrectly, which means that you might get duplicates identified that are actually different articles. HDAS allows you to view the results it thinks are duplicates, based on matching the title and PubMed ID fields, and gives you the option of choosing to delete the genuine ones.

To deduplicate sets of saved search results:

- go to your saved results and click to view them
- if there are duplicate records in your results set, you will see a message at the top of your results telling you how many duplicates you have:



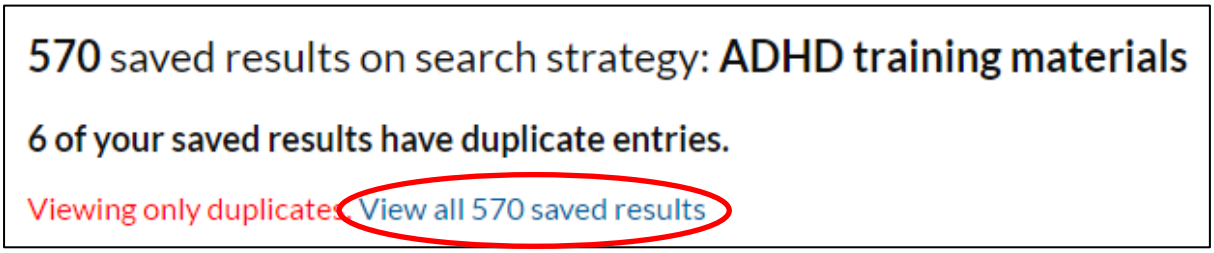
- click on the link that says **View only the n results with duplicate entries** (where n is the number of duplicate records)
- you will see a list of the suggested duplicate results side by side so that you can easily compare them: work down your list of suggested duplicates, checking to see if they are genuinely the same article
- if they are, you can choose which version to delete by clicking in the checkbox next to it:




- once you have finished selecting the duplicate records, you can delete them by clicking the **Delete Selected** button at the top or bottom of your screen:

- confirm you want to delete them by clicking the red **Confirm** button
- you will then be returned to your full set of deduplicated search results.
  If you have deleted some duplicate results, you will see that you have a new total number of saved results showing.

NOTE: you can come out of your duplicate results view at any point by clicking on the **View all n saved results** link:

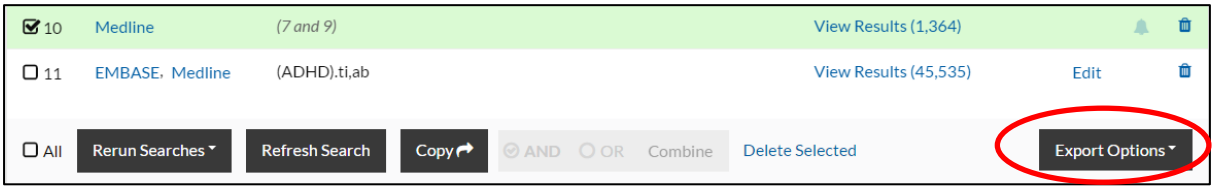


## Exporting results

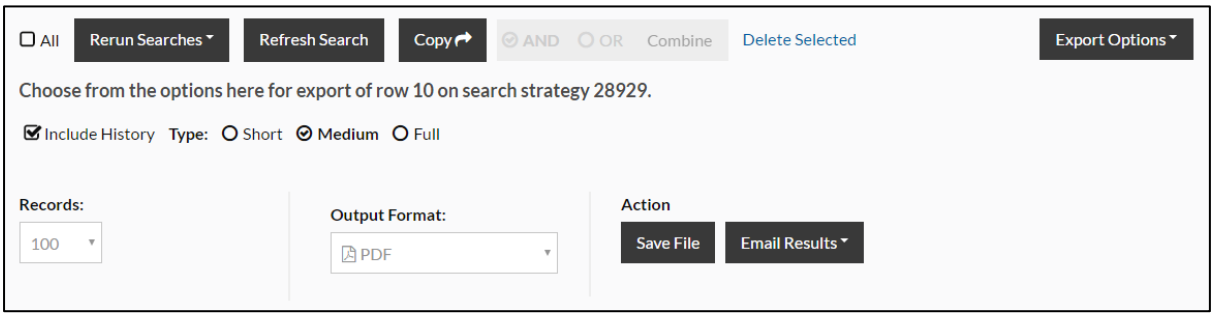
Once you have a set of results, you may want to export them so that you can see or work with them outside of HDAS.

You can only export one search row (from a search in a single database) at a time. The Export Options box is greyed out until you select a row.

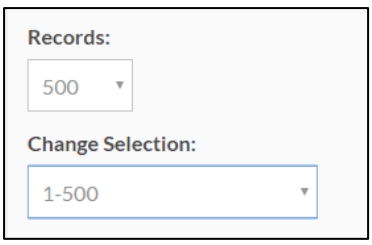
Select the row you want to export by ticking the checkbox at the left hand side. Once you do this, the **Export Options** button at the bottom of your search strategy becomes black and clickable:




When you click on this button, the export options panel opens, which gives you some choices about what to export:




- your search strategy is automatically included with your search results. You can choose not to export the strategy by clicking in the checkbox next to **Include History.**
- choosing Short, Medium or Full varies the amount of detail you export for each record:
    - **Short** includes basic bibliographic details (author, title, journal name, publication year, volume, issue, page numbers)
    - **Medium** includes the bibliographic details with the abstract
    - **Full** includes all the above, as well as ISSN, DOI, accession number and keywords.
- you can then specify how many results you want to export using the drop down box next to Records – the default is set to 100, but you can choose 50, 100, 300 or 500 records.



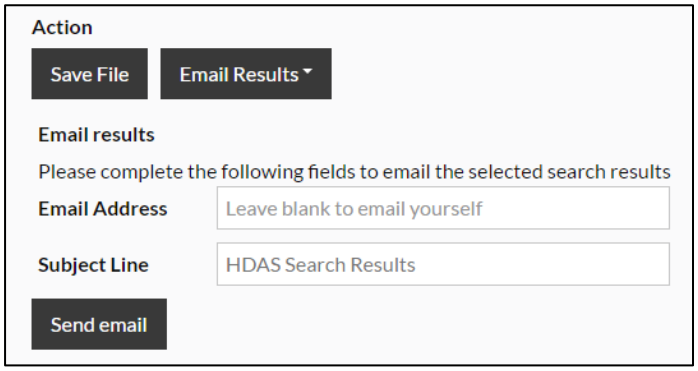

If you select 500, you will see an additional drop-down selection box displayed:
This allows you to export results in batches of 500, up to a maximum of 4000. You can choose which set of 500 to export at a time.

**NOTE 1**: If your search row has more than 100 results, you will need to change the number of records from the default to export them all – otherwise, just the first 100 will be exported.
**NOTE 2**: selecting larger numbers to export gives you a prompt that it may take a while to generate the export, with advice about how to carry on working while you wait.

- you then need to choose your output format from the drop-down selection box: PDF, Word, Excel or RIS.

  **NOTE**: RIS gives you a file which can then be opened and used with reference management software. If you want to export full text links in your RIS file, you will need to choose the Full records option.

- your final choice is then whether to save or email your file:
  To save your file, click on the **Save File** button - a new window will open while your export file is generated. You can then open the download file and save it.
  To email your results, click on the **Email Results** button. Some additional boxes will be displayed:




You can type the email address of the person you want to send the export to in the box (leaving the box blank will send the email to the address registered with your OpenAthens account). You can send to more than one person by typing all the email addresses in the box, separated with either spaces, commas or semi-colons.
You can also change the subject line of the email.
Once you've done this, click the **Send email** button. You get a brief message saying **Sending…**, then **Sent!** to confirm that the export has been sent.

To close the export options once you have your file, click on the **Export Options** button:

This brings you back to your search strategy.

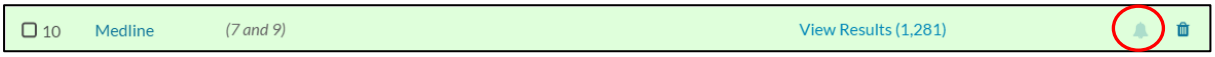
**NOTE**: you cannot export results directly from a search carried out from more than one database. You need to save results from each database into a set of saved results, and then export your saved results set.

# Alerts

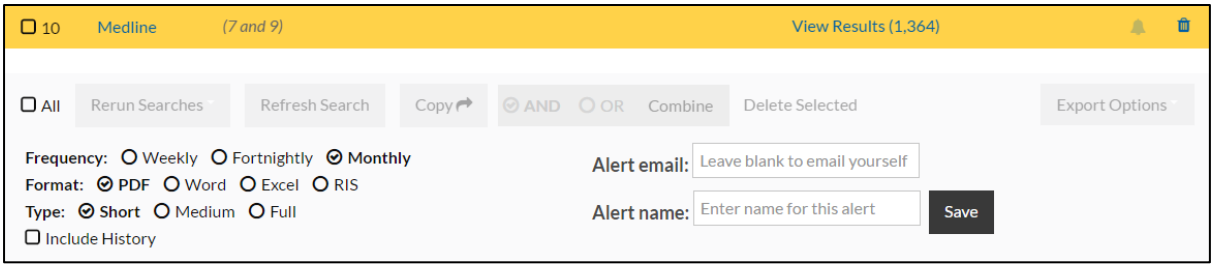
Once you have created and saved a search, you may want to run it regularly to see what new results become available. HDAS has an alerts feature that allows this to be done automatically for you, with the results emailed to you. You can also choose to have the results emailed to someone else.

## Creating an alert

You can set up an alert on any row in any **saved** search strategy by clicking on the bell icon at the end of the row (note: the bell is a pale blue if it hasn't already got an alert set up):




This then opens some options below your strategy:




You can choose:

- **Frequency**: how often you want to receive your alert (weekly, fortnightly or monthly)
- **Format**: what sort of file you want to be emailed to you (PDF, Word, Excel or RIS)
- **Type**: how much detail to include for any new results
- **Include History**: whether to include your search strategy with the results.

### Alert email

You can then specify an email address to have the alert sent to:

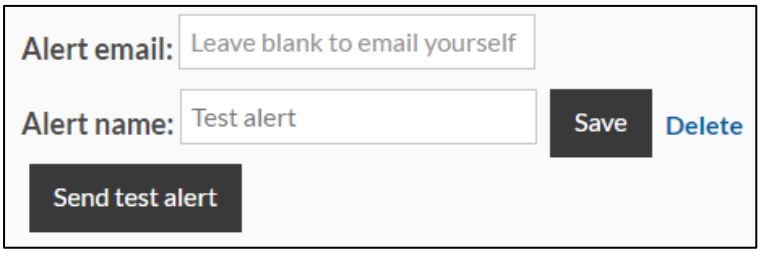
- if you leave this box blank, the results will be emailed to yourself, using the address that you gave when you registered for your OpenAthens account
- you can add more than 1 email address – just separate them with a comma or a semi-colon
- if you want to email yourself as well as someone else, you will need to type your address in the box as well.

### Alert name

You also need to give your alert a name by entering it in the **Alert name** box and then clicking the **Save** button.

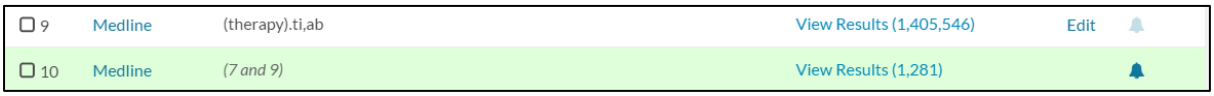
You get a message to confirm that your alert has been saved.

Once you've saved the alert with a name, you get the option to **send a test alert**, so that you can check that it's working as you intended:



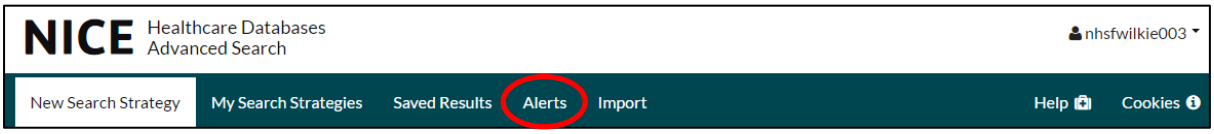

You (or whoever you chose to send the alert to) will get an email with a file attached.

You can close the alert panel by clicking on the bell icon in your search strategy again. Note that the bell is now a darker blue – this indicates that an alert has been set up for that row:

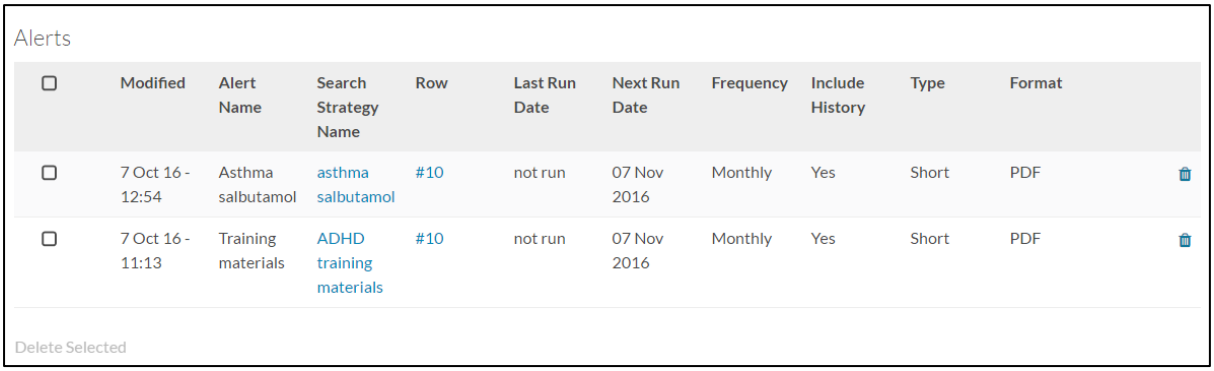



## Editing and deleting alerts

You can access and test all of your saved Alerts from the **Alerts** tab at the top of the page:




When you click this link, you are taken to a list of all your saved alerts, with the date each was last modified, the name you gave the alert, the name and row number of the saved search you set it up from, when it was last run, and when the next alert is due:




**To edit an alert**:

- click on the row number (for example, #10 in the image above)
- this takes you to the appropriate line in your search strategy
- click on the bell icon to open the alert panel
- make any changes to the frequency, format or type
- click on **Save**
- you will see confirmation that your changes have been saved.

**To test an alert:**

- open the alert panel as above, then click on the blue Send test alert button
- you will get a message confirming that the test has been sent:

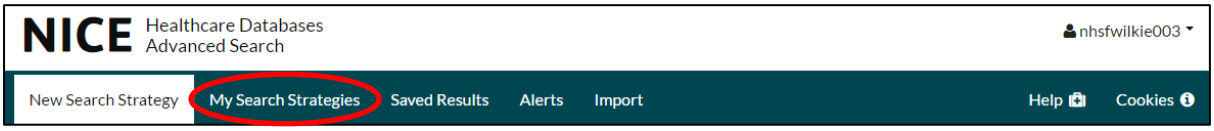
**To delete an alert**:

- click on the bin icon at the end of the row in your list of alerts, then click on the red Confirm button
  OR
- delete more than one at a time by clicking in the checkboxes next to each alert, then click on **Delete Selected**
  OR
- go to edit an alert (see above), and click the **Delete** button from within the alert panel:

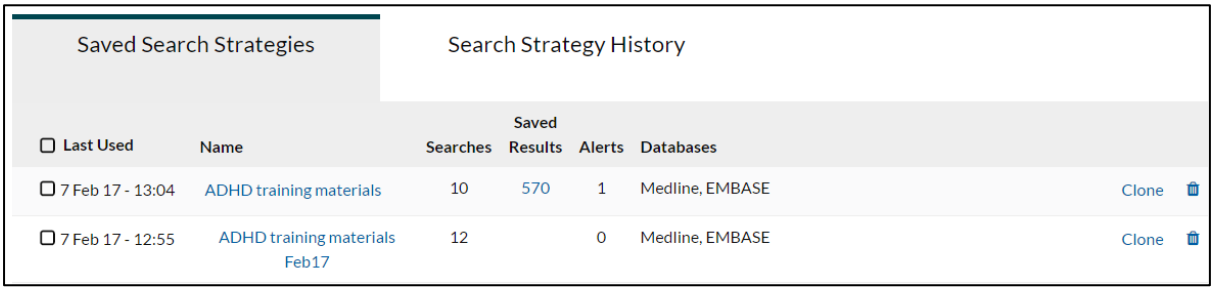
# Saved search strategies

## Accessing your previous search strategies

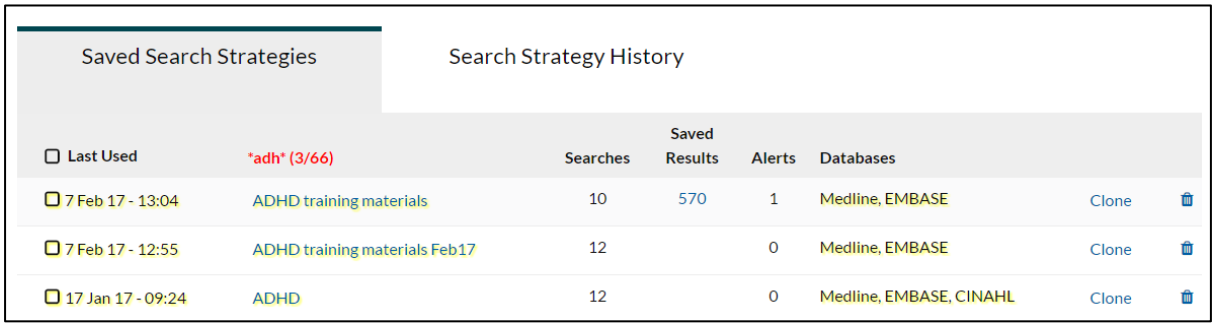
You can find all of your saved search strategies by clicking on **My Search Strategies** at the top of the page:




You are presented with 2 sets of strategies:

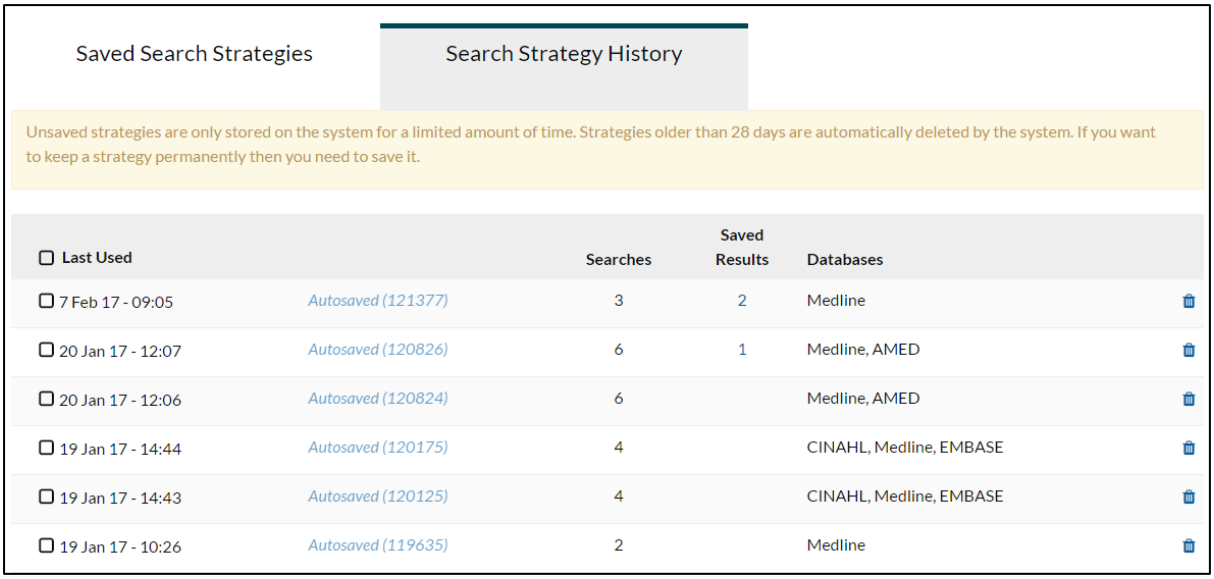



- **Saved Search Strategies** are the ones that you have given a name to and saved yourself (see section on Saving a search strategy). These are saved until you choose to delete them.
  They are saved in date order. You can identify searches by their names and **Last Used** dates, and see how many rows are in each saved search, how many results are saved for that search, and which databases were used.
  If you have a long list of Saved Search Strategies, you can search for a specific one by just typing the first few letters of its name (you don't need to click anywhere on the screen to do this, just start typing):




  In the example above, the letters **adh** have been typed, and 3 saved search strategies have been found.
  You can use the backspace key on your keyboard to remove the typed letters and go back to your full list of saved search strategies.
  You can click on the name of the search strategy to open it and continue working.
  Clicking on the number of saved results takes you to those results.

- **Search Strategy History** displays the autosaved strategies for searches you have carried out but not saved.




These are stored on the system for 28 days before being automatically deleted. They allow you to find and carry on working with searches in case of a system crash or time-out.

They are given a number to identify them, and are named as **Autosaved (number)**.

You need to use the Last Used date and time to find a particular search. When you find the one that you want, you can click on the **Autosaved (number)** link to reload the search strategy and continue working.

## Deleting saved search strategies

To delete saved search strategies or autosaved search strategies:

- click on the bin icon at the end of a row, then click on the red **Confirm** button

  OR
- select more than one at a time using the checkboxes next to each one, click on **Delete selected** and then click the red **Confirm** button.

## Cloning saved search strategies

The clone feature allows you to create a copy of a whole search strategy, which you can then save under a new name and continue working on, without changing the original saved strategy. This might be useful if you want to start a search and then try out different search options or save different sets of results. It also allows you to set up and save strategies that you might need to use repeatedly, such as publication type search filters: you can save them once and then clone each time you want to use the filter with other search term terms.

You can only clone a search from the My Search Strategies list:

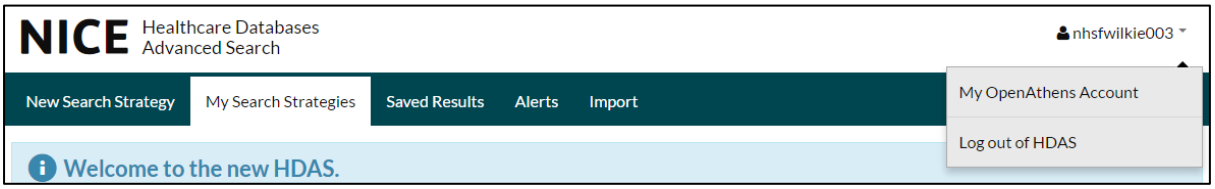
- find your saved search strategy, then click on the Clone button:

- your search strategy will open up, but you will see that you have the option to save this as a new search strategy:

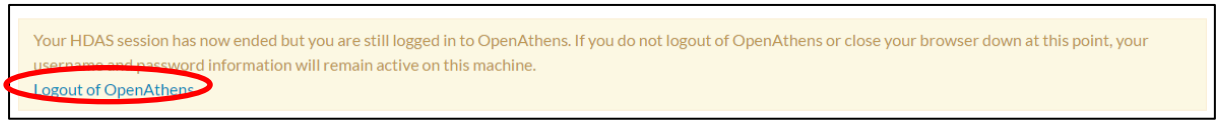
- you can then continue to build your search.

# Logging out

To log out of HDAS, click on your username in the top right hand corner of the screen and choose **Log out of HDAS**:




This logs you out of HDAS. You are also given the option to log out from OpenAthens:




Clicking the **Logout of OpenAthens** link takes you to the OpenAthens site to complete the logout.