Welcome to this introduction to the Dialog search platform
Learning Objectives

At the end of the session, you will be able to:

• Differentiate among the databases in Dialog
• Conduct basic searches using the Dialog platform.
• Refine your search results.

During this session we will show you the basic features of Dialog and at the end of the session you’ll be able to.....
The most typical way of accessing Dialog is via an individual username and password. The login page can be reached at this url.

There are other authentication options, that your company/Institution may have selected in alternative to the individual access.
Dialog gives access to over 140 databases with the standard contract access, so the brand new users may need some help initially to orient themselves among the dozens of databases and their subject coverage.

The Dialog platform offers several ways of selecting the databases, from the easier access available in Basic Search via the **Industry Groups**, to the more flexible option of multifile selection from the **Drop-Down List**, to finally the possibility for each user to build their own fast access group(s) using the **“My Shortcuts”** option accessible from the Preferences in My Research.
The Industry Groups in Basic Search also allow a fair glimpse at the topics covered by the whole database portfolio available in Dialog

**40 Patent Databases**: Full text for 31 country authorities, plus bibliographic information for additional 65 countries, plus additional 8 specialty, mostly international patent databases.


**20 Business, Trade, News & Financial databases**, mostly full text, covering all the strategic industrial sectors just mentioned.
The Dialog platform offers also 3 different levels of searching, each designed to meet the needs of users with different experience stages, from the novice user, for whom the **Basic Search** is the ideal starting point, to the middle level researcher, who will find useful the **Advanced Search** that offers many helps for more refined strategies, to the very experienced online searcher, that will be comfortable with the **Command Line** search form, where (s)he can build long, complex and interactive multiset searches whenever there is the need.

In this introductory session we will concentrate on starting simple searches in Basic Search. We can launch simple one string searches, and go straight to the Results page.
The Results page contain many features that allow evaluating the results, refining them by using various Narrow Filters, sorting them, saving the search at various levels, for rerunning them at a later stage, saving the results on your own pc in various formats or sharing them via email etc.

KWIC = Key Words in Contexts, shows the search terms highlighted in the context of few lines of text. Helps assessing the relevancy of the results.
When displaying the single documents online, the Document view page also offers several features to evaluate the documents, check for duplicates, translate the text in various languages on the fly, analyse the full indexing details, retrieve similar documents, and access additional postprocessing tools that we have already seen in the Results page.
Defaults – Automatic retrieval of word variants

All searches to demo these features were run on 2 databases: Embase and Medline, on March 22, 2019

Basic Search Syntax – Defaults
By default the system will automatically search:

- **singular and plurals (nouns)**
  - cat, cats
  - child, children
  - bacteria, bacterium
  - fungus, fungi

- **comparatives & superlatives (adjectives)**
  - tall, taller, tallest
  - cool, cooler, coolest
  - good, better, best

- **US and UK spellings**
  - color, colour
  - defense, defence
  - oestrogen, estrogen
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Defaults - Multiple Terms

When entering multiple terms separated by a space
• AND is implied between each term

CANCER RESEARCH → CANCER AND RESEARCH

How can I search for a phrase
• Enclose a phrase in quotation marks for an exact search
• Quotation marks “turn off” word variations

“FINANCIAL FUTURES”
“THE CAT IN THE HAT”
Phrase Searching

“double quotes” deactivate the automatic retrieval of word variants.

The hyphen is another way of phrase searching and doesn’t deactivate the automatic retrieval of word variants. Here includes EVENTS

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CANCER RESEARCH ➔ CANCER AND RESEARCH

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“The CAT IN THE HAT”
Boolean Operators

Terms can be combined using AND, OR, NOT

**AND**
Retrieves all records that contain all of your words or phrases.

`cancer AND research`

**OR**
Retrieves all records that contain any of your words or phrases.

`food OR nutrition`

**NOT**
Retrieves records that contain the first search term, but not the term following the NOT operator.

`nursing NOT shortage`
Truncation, using *

* Left, right and middle truncation.
Retrieves from zero to ten characters.

- **nurs*** nurse, nurses, nursing, nursery, nurselings
- **advers*** adverse, adversely, adversaries, adversarial
- **col*** colour, color, colder, collar, collector, columnar, colinear, collaborator
- **old** old, told, household
Truncation, using *

* Left, right and middle truncation. Retrieves from zero to ten characters.

nurs* nurse, nurses, nursing, nursery, nurselings

advers* adverse, adversely, adversaries, adversarial

col*r colour, color, colder, collar, collector, columnar, colinear, collaborator

*old old, told, household
Parentheses: Using OR with other operators

Carefully consider the precedence order when combining multiple terms. And that (parentheses) have precedence over all the Logical Operators, use parentheses to redefine the default order, for example when the searcher intends to use OR to search synonyms or term variants.

**Use (parentheses) when combining OR with other Boolean operators:**

- `(illness OR disease) AND research`
- `(illness OR disease) AND (human OR animal)`
- `(illness OR disease) NOT plant`
Use Synonyms and Truncation

Truncation, using *

* Left, right and middle truncation.
Retrieves from zero to ten characters.

nurs* nurse, nurses, nursing, nursery, nurselings

advers* adverse, adversely, adversaries, adversarial

col*r colour, color, colder, collar, collector, columnar, collinear, collaborator

*old old, told, household
### Proximity Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRE (same order)</td>
<td>retrieve the search terms if separated by max 4 intervening words (so PRE includes also the phrase)</td>
</tr>
<tr>
<td>NEAR (any order)</td>
<td></td>
</tr>
<tr>
<td>PRE/#</td>
<td>adding a number after the slash / changes the default of 4 words to less or more</td>
</tr>
<tr>
<td>NEAR/#</td>
<td></td>
</tr>
</tbody>
</table>

**Example:**
- Pre/1 N/3

**Frequent Phrase:**
```
((ADVERSE OR SIDE OR UNTOWARD N/2 EVENT OR EFFECT OR REACTION)) AND (PARACETAMOL OR ACETAMINOPHEN) AND PD(1940-2019)
```

**40174 Results**

**Search within**

**Dialog Solutions**

**Note:**
- PRE and NEAR
  - can be followed by a number (can be “zero”)
  - used without number default to PRE/4, NEAR/4

**Example:**
- DRUG* NEAR/5 THERAPY
- CANCER PRE/0 RESEARCH
Scrolling down on the results titles is easy to verify if the search is spot on or needs some refining.
Refining results with Narrow Filters

Several Narrow Filters in the Results page allow analyzing the content of key parts of the records and using some of the most relevant terms as additional filters to further focus the results.

One of the easiest tools that can be used is the Publication Date graph, showing initially a column per decade, if the literature for a given topic goes back for many years, or one column per year. Single columns can be clicked on, if need to focus on a specific decade or year, otherwise the toggles can be moved back and forth to identify a range of years. Then click on the Update button.

The applied filters will show at the top of the results list.
Analyse the content of given fields

Some of the filters show the content of specific parts of the documents (fields) and can be used to identify the most relevant terms (usually sorted by record count, from the most covered down). The list of terms can be sorted alphabetically or by record count.

With the columns **Include** or **Exclude**, selected terms can be used as further focus of the existing search (**Narrow my results**), or as search terms for a totally new search (**Run new search**).

They can also be saved in a list in various formats for further analysis (**Save list**).

The most common filters are **Publication Title**, **Document Type**, **Author**, **Language**, **Subject**, etc.
In a search over more than one databases, with similar subject coverage, the retrieval of duplicates is highly probable. PQDialog allows recognition and removal of the duplicates, up to a maximum of 5,000 results. In most cases the Duplicates removal is active by default and operates in the background.

If it happens to be deactivated, it can be launched after the fact in the Results page, in the Duplicate documents settings panel. Click on the **Remove duplicates** button. (Remember this works on a maximum of 5,000 results.)

Once the process is completed, the nr of results at the top of the page shows the final nr after the removal, and is marked by an asterisk. The options in the Duplicate documents settings panel show that the “Duplicates are removed”, plus the reverse order **Include duplicates** button plus some advanced features.
Online Help is Always Available

The Online Help is reachable from the ? At the top right corner of every page and from the “Search tips” link in the search page.
It contains a wealth of information on every feature of the search platform, the search syntax and some preliminary information on the most used databases.
Summary

After this session you will be able to:
• Evaluate the wealth of databases available in Dialog and select them for searching
• Conduct efficiently a simple search
• Evaluate the results and refine the search if necessary.
More information on the Dialog platform, its features and the databases can be found in the LibGuide.

Each single database hosted in PQDialog has its own guide. They are called ProSheets, and can be reached from the link at the top left corner of every page of the search platform.