Quick Guide to Searching *Global Health*
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Getting help as you go along

As you use the interface you can refer to help guides - just click on a question mark to find out more.

These question marks lead to help information.
Browsing content on Global Health homepage, theme and region pages

Users can browse for information on a theme. Editors have selected the content and update it regularly. There are 2 ways to browse, you can choose a subject theme or a regional theme. There are also alerts updated daily on the right-hand menu.

Each page, including the homepage, has 5 areas:

- News - a recent article
- Articles - selected items from the bibliographic database
- Book chapters - selected book chapters with fulltext access
- Reviews - relevant reviews from CAB reviews also with fulltext access
- Alerts - a curated feed of items of third party content relevant to that page.

“see more” expands the list of articles.
“search more” launches a relevant search of the site.
Searching on *Global Health*

There are 3 ways to search for information on *Global Health*: **Keyword** searching, **Advanced** searching, and searching with vocabulary from **CAB Thesaurus**.

**Keyword** (or simple) searching is similar to using an internet search engine, where you type search terms then press **Search**. The Keyword search explores all indexed fields in the *Global Health* database. Search filters (or **facets**) help you narrow your search results.

**Advanced** searching, on the other hand, enables you to easily narrow your search to the index fields most relevant to your search. You can filter your search by database field, (e.g. article title, author name, publisher etc.), date, document type, CABI product etc.

Use the **CAB Thesaurus** to search CABI's controlled vocabulary of terms covering pure and life sciences, technology and social sciences.(not covered in this Quick guide)

**Keyword searching**

The **Keyword** search enables you to carry out a search by typing a single word, a phrase or a complex query.

A CABI database record, e.g. an article or paper, contains individual data fields such as the title, the abstract, the publisher, etc. When you type a word or phrase in the **Keyword** search box, then press the **Search** button, *Global Health* searches the whole record, i.e. the record's title, all indexing fields (including the author), the abstract and the record's bibliographic details. This is known as a 'free-text' search.
Single Word Searching
A single term is a single word such as *cattle*. Multiple words entered into the search box are treated as single terms and combined with an invisible AND.

For example, *antibiotic resistance* is treated as *antibiotic AND resistance*.

Phrase Searching
A search phrase must be surrounded by double quotes as in the example "*antibiotic resistance*".

Example:
You can enter a search string that contains multiple terms, i.e. single words and phrases, as in the example "*antibiotic resistance*" "*Staphylococcus aureus*" Europe. These three terms are, by default, combined with an invisible AND, as in, "*antibiotic resistance*" AND "*Staphylococcus aureus*" AND Europe

For greater control of your search, you can combine multiple terms with the three Boolean operators (AND, OR, NOT) to form a more complex query. Make sure each phrase in your Boolean query is identified correctly. For more information, see Boolean Operators.

Search rules
This table explains some search rules to help you enhance your searches:

<table>
<thead>
<tr>
<th>Search term</th>
<th>Search Rule</th>
<th>Examples and exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Punctuation</td>
<td>Punctuation in search terms is ignored</td>
<td>Exceptions: ! (exclamation mark) is treated as a searchable character,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>– (hyphen), terms with or without a hyphen find the same result,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>e.g. malaria-resistant finds records containing malaria-resistant and malaria resistant</td>
</tr>
<tr>
<td>Capitalisation</td>
<td>Search terms are case insensitive</td>
<td>CABI, Cabi and cabi are treated the same</td>
</tr>
<tr>
<td>Accented characters</td>
<td>Letters with accents and foreign characters are ignored</td>
<td>ñ is treated as n</td>
</tr>
<tr>
<td>Asterisk wildcard *</td>
<td>Represents any group of characters</td>
<td>Can be used before, after or in the middle of a search term, e.g. *type finds geno-type, subtype, karyotype etc.</td>
</tr>
<tr>
<td>Question mark wildcard ?</td>
<td>Represents any single character</td>
<td>wom?n matches woman and</td>
</tr>
<tr>
<td>Wildcards * and ?</td>
<td>* and ? may be combined</td>
<td>Organ?ation* matches organisation, organisations, organisational, organization,</td>
</tr>
<tr>
<td>Boolean operators AND, OR, NOT</td>
<td>Can be used to refine your search</td>
<td>For more information, see Boolean Operators</td>
</tr>
<tr>
<td>Parentheses and quotation marks</td>
<td>Use either quotation marks or parentheses around phrases, if you are combining more than one phrase with Boolean operators. Example: (Antibiotic OR Antiviral) AND (Alga* OR Seaweed) For more information, see Boolean Operators</td>
<td></td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Single term using index field names (or tags)</td>
<td>Enter the names or tag followed by a colon (:) Example, using the corporate author tag, ca: To search for all records authored by WHO, enter ca:&quot;World Health Organization&quot;</td>
<td></td>
</tr>
<tr>
<td>Multiple terms (i.e. a phrase) using index field names (or tags)</td>
<td>The index field is only valid for the term that it directly precedes. To group several terms together with a single field, use either: quotes, if searching for a phrase, or parentheses (brackets) if searching for separate words. Example: pb:blackwell publishing Matches 'blackwell' in the publisher field, and 'publishing' in the Free-Text index. pb:&quot;blackwell publishing&quot; Matches the phrase 'Blackwell Publishing' in the publisher field.</td>
<td></td>
</tr>
</tbody>
</table>

**Boolean operators**

To make searching more accurate you can use Boolean operators (AND, OR, NOT) to link your search terms.

**AND**

By default, phrases and single words are searched in combination and are linked with the Boolean operator AND.

Example:
The search phrase "antibiotic resistance" europe"mycobacterium tuberculosis" retrieves records whose indexing contains all three search terms together.

**Note.** You can type AND in either upper or lower case as shown here: "antibiotic resistance" and Europe AND "mycobacterium tuberculosis"

**OR**

Use this Boolean operator to modify or refine your search.

Example:
You want to find research papers about measles mumps or rubella. If you type the three terms:

Measles mumps rubella

*Global Health* retrieves only records that contain all three terms. In other words, they would be ANDed together.
This search would not find records that contain just one or two of the terms. This would seriously limit the search. In this example, you want to find records that contain all the words or any of the words. To do this, you can use the OR operator, i.e.

Measles OR mumps OR rubella

This search finds records that contain one or more of the three search terms. The OR operator “expands” the search. The search gets larger as you OR more terms together.

NOT
Use this Boolean operator to exclude terms from your search.

Example:
You are interested in research papers about children but not infants. To do this, use the NOT operator:

children NOT infants

This search finds all records containing the word breeding, but excludes any record that includes the word genetics. The NOT operator restricts your search, making it smaller.

Tip. Use the AND drop-down to use Boolean operators to link and refine your search terms. For more information see Boolean Operators.

Tip. Use the NOT operator carefully, as it is possible to lose relevant records by accident.

Using Multiple Operators

To further narrow a search, you can combine two or more of Boolean operators together, in a single, complex search statement.

Example
You are interested in research papers about the breeding of sheep or cattle or horses but not in papers about genetics. In this search, use AND, OR and NOT, as shown below:

Measles OR mumps OR rubella AND children NOT infants

Then you must describe the order in which to carry out the search:

Firstly, find Measles OR mumps OR rubella
Secondly, combine this group (or set) of records with the word children
Lastly, remove the records containing the word infants

To do this in more detail:

Step 1. Specify the order of the search, use parentheses (i.e. round brackets) to enclose the three separate operations. We want the OR operation done first, so enclose the ORed terms in brackets:

(Measles OR mumps OR rubella) AND children NOT infants

Step 2. Add the AND operation, by enclosing this in a second set of brackets:
((Measles OR mumps OR rubella) AND children) NOT infants

Because the NOT operation is outside both sets of brackets, this is performed last.

Step 3. Click Search.
Searching for Author names

If you are looking for an author name in Keyword search, you need to remember that this search works across all fields, so searching on the last name will search all text in a record and may give false results if the name you are searching for also appears in the Abstract or Title fields in addition to the Author field, as illustrated here with this search for Ashby which has retrieved Ashby in the title:

To increase accuracy, if you know at least one author initial, use quotation marks around the last name followed by the initial e.g. “Ashby, R”. Using quotes instructs the search to look for that match of characters and will reduce the number of false results.

For example searching for Ashby on its own brings back one set of results but searching for “Ashby, R.” brings back a much more targeted list of author names and will include
results for Ashby, R. as well as those for Ashby R.E., Ashby R. L., Ashby, R.M., Ashby, R.O. and Ashby, R. P.

You can also use the Author Refine feature to hone your search results further; choose alphabetic order as your sort choice in the Refine feature to make it easier to view results.
Proximity Searching

To search for words that occur within a certain number of words from each other use the lowercase expression `<near/x>` where x is the number of words between the words you are searching for. Please note that x cannot equal 0.

So “cognitive near/3 therapy” finds records where the word “cognitive” occurs within three words of the word “therapy”. The larger the value of x the more results you will find for your search.

Examples:
**Advanced searching**

The **Advanced** search screen enables you to run complex search queries in multiple search boxes which you can link together with Boolean operators (AND, OR, NOT). Use the index field drop-down list to refine your advanced search by selecting the appropriate index field for your search terms:
Additional filters

Once you have entered a search terms in the search boxes, you can refine your search by applying additional filters as follows:

<table>
<thead>
<tr>
<th>Screen field:</th>
<th>Limit your search to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Published between</td>
<td>a range of publication dates of the original papers</td>
</tr>
<tr>
<td>Added since</td>
<td>those records added since your previous search, for example</td>
</tr>
<tr>
<td>Document type</td>
<td>specific documents types, such as books and conference proceedings</td>
</tr>
<tr>
<td>Only search for</td>
<td>CABI Hosted Full Text. Publications which are hosted but not published by CABI, e.g. conference proceedings, smaller publishers' journals etc. These are typically referred to as 'grey' literature. Evidence Based Research. Designed to retrieve systematic review and meta-analyses by searching for elements in a publication's title and abstract. Open Access Journals. Retrieves only articles published in 'gold open access' journals, which are free to download and use. Currently <em>Global Health</em> only retrieves data published from 2015 onwards.</td>
</tr>
<tr>
<td>Search in</td>
<td>one or more CABI products</td>
</tr>
</tbody>
</table>
Search results

The Search results tab displays the results of your searches (Keyword or Advanced). Each search result shows a shortened version of the main record and includes the record title, the first few lines of the abstract and the main bibliographic details.

Refining your results

If your Keyword or Advanced search retrieves an unmanageable number of results, you can narrow the list to the most relevant records by using the facets.

To refine your search results by facets (i.e. important subject headings), select the required facet from the Refine by: list on the right-side of the search results page.

Facet windows help to visualise important terms as boxes on a chart called a 'tree map'. The size of a term's box relates to the number of times the term occurs in the search results' abstracts, as in this example from the Topics facet.
**Tip.** To see all terms and their frequency as a selectable list, click the **Show list** button.

**To refine your search by facet:**

1. Select the facet you want to refine your search on, e.g. **Topics**, to display the facet.
2. Select one or more terms from the facet window.
3. The default Boolean operator is OR which you can change if required.
**Note.** To refine by combining multiple facets simply close the facet using the close button and open another facet. Do not click the **Refine results** button yet. The combined facets are displayed on each facet window.

4. When you have finished, click the **Refine results** button to update the search results page. Your facet terms are listed in the **Refined by:** field at the top of the **Search results** tab.

**Tip.** To see your search terms (in syntax format) including your initial search (Keyword or advanced) and subsequent refinements, click **Edit Search**. For more information, see **Edit Search Section**.

**Edit search**

As well as the clickable search filters available to refine and edit your search terms, you can also directly view and edit the 'behind the scenes' query statement used by the **Global Health** search engine.

To see how your search is interpreted on the **Global Health** search engine, click the **Edit Search** button.

**Note.** The **Edit Search** is an advanced feature of **Global Health** and care and knowledge is required to edit a search statement successfully.
Building searches from index terms

Based on the indexing terms of the abstract record you are viewing, you can broaden your enquiry by running a new search. Indexing terms are keywords of records analysed and tagged by CABI’s indexers - the frequency of each indexing term in the record is shown in this example:

Selecting multiple indexing terms

You can select indexing terms from multiple headings. For example, you could select terms from **Organism Descriptors** then close that window and open **Identifiers** to add more terms to your search. Use the **Close** button to exit each heading window. When you have selected from the final heading window, click the **Search** button.
My CABI

Signing in to My CABI enables you to:

- save your searches,
- save your records,
- annotate and highlight your records,
- set up email alerts for saved searches, and
- create projects that contain searches and records.

To sign in to your My CABI account:

1. If you are already registered in My CABI Tab, enter your registered Username/email and Password, in the Already Registered section.
2. Click the Sign In button.

Creating a My CABI account

To set up a My CABI account:
1. Click the My CABI tab on the main search page.

2. On the My CABI tab complete the fields to create an account:

   - First and last name
   - Email address
   - Username (this can be your email address – just tick the Use email as username checkbox)
   - Password (must be at least 6 characters and meet at least 2 of the criteria listed)
   - Confirm password

3. Click Create account. A confirmation email is sent to your registered email address,

To return to your previous screen, click the Continue link.
Managing records

When you have refined your search results to a manageable list, you can group those records you are most interested in.

To select those records you are interested in, tick the check-box on the left side of the title.

Note. Global Health automatically copies your selected records to the Selected Records tab. They are retained on the system only for the duration of your current Global Health session. To save your selected results for future use, you must first sign in to My CABI.

Performing actions on your results

Global Health enables you to perform actions on your search results, such as print, download, etc. using a toolbar buttons. Some actions will require you to sign into your myCABI account.
In a *Global Health* session, the records you select from your search results (by ticking their check-boxes) are automatically added to the **Selected Records** list. In this way you can accumulate records from one or more searches to a single list which you can review and refine.

If you are logged in to My CABI you can save records or add them to a project. The Saved records tab contains both selected records and saved records.
The following actions can be performed from:
- Search results
- Selected records
- Saved records
- Project records
- Abstract page

For some actions you need to be signed in to My CABI:

<table>
<thead>
<tr>
<th>Action</th>
<th>Instructions</th>
</tr>
</thead>
</table>
| Print records   | Select records and press Print from the Action toolbar  
Print a) citation only, b) citation and abstract, or c) full record |
| Email record/s  | Select records and press Email from the Action toolbar  
Enter the email address  
select a) citation only, b) citation and abstract, or c) full record |
| Download record/s | Select records and press Download/export from the Action toolbar  
Select ‘Download to file’ or RefWorks  
Select a file format if you have selected download to file  
To export to RefWorks you need a RefWorks account  
select a) citation only, b) citation and abstract, or c) full record  
Note. If you want to download a record that includes annotations and highlighting, you need to be signed in to My CABI and select HTML |
| Save record/s   | Select records and press Save from the Action toolbar  
You need to have a My CABI account to save a record. If you are not already logged in you will be prompted to log in or create an account  
If you have created projects you are given the opportunity to save records to a project instead  
Records are saved to Saved records on My Records tab. Note:  
Saved records show with icon. |
| Add to Project  | Select records and press Add to project from the Action toolbar  
You need to have a My CABI account to add a record to a project. If you are not already logged in you will be prompted to log in or create an account.  
Select the project and press ‘Add to project’ button |
Claim your publications on *Global Health* with your ORCID iD. This process connects your My CABI account to your ORCID account and enables you to export the metadata of your publications from *Global Health* to your ORCID account; at the same time your ORCID iD is appended to your name on our abstracts, you will have claimed your publications.

You need to have a My CABI account to add a record to a project. If you are not already logged in you will be prompted to log in or create an account.

### Highlighting and annotating records

You can use the tools on a record page to:

- Highlight passages of text
- Add annotations to the abstract

You need to have a My CABI account to annotate and highlight records if you are not already logged in you will be prompted to login or create an account.

#### To highlight:

1. Click the **highlight tool** and select the highlight colour (if you have not signed into My CABI you are prompted to do so)
2. Select the text you want to highlight then click the **highlight icon**
3. Click the **save** button to add the highlighting to the abstract

**Note.** To remove highlighting, hover over the text to display the pop-up remove icon. To permanently remove the highlight, click the remove icon.
To annotate:

1. Click the annotate tool (if you have not signed into My CABI you are prompted to do so)
2. Select the text you want to annotate then click the annotate icon
3. In the Add annotation window, type the Annotation title and text
4. Click the save button to add the annotation to the abstract

Note. To see the annotation, hover over the annotated passage in the abstract. The Annotation window is displayed where you can edit or delete the annotation.
Managing your searches

The searches you have made (Keyword and Advanced) are automatically added to the Search history list. The search terms you used and any refinements are retained only for the duration of your current Global Health session.

If you are signed in to My CABI you can save your searches for future use, add them to a project or set up email alerts. If you are signed in to My CABI the My Searches tab contains your search history and saved searches.

Performing actions on your searches

The following actions can be performed from:

- Search history
- Saved searches
- Search results
- Project searches

<table>
<thead>
<tr>
<th>Action</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save search</td>
<td>You can save a search from the search results tab using the Save search button, or from Search History by: Selecting the search(es) and press Save from the Action toolbar You need to have a My CABI account to save a search. If you are not already logged in you will be prompted to log in or create an account If you have created projects you are given the opportunity to save searches to a project instead Searches are saved to Saved searches on My Searches tab.</td>
</tr>
<tr>
<td>Create an email alert</td>
<td>Select search(es) from either Saved searches or Search history and press Email alert from the Action toolbar. You need to have a My CABI account to create an email alert. If you are not already logged in you will be prompted to log in or create an account Enter the email address You will receive a weekly email alert showing up to 10 new records.</td>
</tr>
</tbody>
</table>
**Add to Project**
Select search(es) and press **Add to project** from the Action toolbar.
You need to have a My CABI account to add a search to a project. If you are not already logged in you will be prompted to log in or create an account.
Select an existing project, or create a new one and press **Add to project** button.

**Combine searches**
Select the searches you want to combine.
Select the Boolean operator AND, OR or NOT.
Press **Combine searches** button.

**Sort by project**
In MyCABI use the **Show Searches** drop-down list to display searches you have saved to a particular project.

Note. The **Saved Searches** option in the drop-down, displays only those saved searches which you have not added to a project.
My projects tab

*Global Health* enables you to organise your search activities into projects. Projects are folders where you can save your records and searches about a particular topic. You need to be signed into MyCABI to use this.

Once you have logged in to My CABI you can:

- Create one or more projects to organise your work,
- Save records and searches into those projects,
- View your project activity and export this activity log as a CSV file,
- Send this activity log and citation information to other project members.

On the My Projects tab you can:

<table>
<thead>
<tr>
<th>Create new projects</th>
<th>Click Create New project to display the Create a project window. Type the name and description of your new project, then click the Create project button.</th>
</tr>
</thead>
</table>
Complete a project
If you want to show that a project's purpose has been fulfilled, e.g. a systematic review, you can mark the project as 'Complete'. To complete a project, select the project's check-box then click the Complete Project button on the Actions toolbar.

Change view
To change the default display of projects from a 'grid' to a 'list' (or vice versa), click the appropriate Change view toolbar button:

Change a project name
To re-name a project: Click the project name to open the Activity Summary list. Click the Edit button. Edit the name as required, then click Save.

Archive a project
To archive a project, select the project's check-box then click the Archive Project button on the Actions toolbar:

Managing project contents
A project's contents can include your saved records and saved searches. You can manage a project's contents, as follows:

Log of project activity
Export activity log as a CSV file
Records saved into the project
Searches saved into the project

Project title
Log of project
Activity Log tab

Displays a log of records and searches you have added to (or removed from) a project.

Records tab

Displays records you have added to a project with brief details - article title, journal name, author and publisher.

Searches tab

Displays searches you have added to a project with brief details - search terms and any refinements, the date you added the search and the number of search results.

**Activity log tab**

The **Activity Log** displays the history of records and searches added to (or removed from) a project. It also shows text highlights and annotations you have made.

<table>
<thead>
<tr>
<th>Activity Log tab:</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add (or edit) project summary text</td>
<td>Click the Edit Summary button then type your text. Click the Save button.</td>
</tr>
<tr>
<td>Add an activity note</td>
<td>Click the Add note link in the Activity Note column. Type your note, then click the Add note button.</td>
</tr>
<tr>
<td>Edit an activity note</td>
<td>Click the Edit note link in the Activity Note column. Make your change, then click the Edit note button.</td>
</tr>
</tbody>
</table>

**Records tab**

The **Project Records** tab displays details of the records in a project. From here you can print, email, download records.

**Searches tab**

The **Searches** tab displays details of the searches in a project. From here you can create email alerts for a search, or combine searches. You can also create a note for a search.
Claim your publications on *Global Health* with your ORCID iD

ORCID is an independent non-profit organization that provides a persistent identifier – an ORCID iD – that distinguishes you from other researchers, and a mechanism for linking your research outputs and activities to your iD. ORCID is integrated into many systems used by publishers, funders, institutions, and other research-related services. You can learn more at [orcid.org](http://orcid.org).

If you are the author of a publication indexed in *Global Health* you are now able to confirm authorship via the ORCID button on *Global Health*. This process connects your My CABI account to your ORCID account and enables you to export the metadata of your publications from *Global Health* to your ORCID account; at the same time your ORCID iD is appended to your name on our abstracts, you will have claimed your publications on *Global Health*!  

1. To begin select the abstracts which match your publications and click on the ORCID button

![ORCID button](image)

2. A pop up will appear which prompts you to log into your personal My CABI account. If you don’t already have a My CABI account you will be able to register for one.

3. As soon as you have successfully signed into your My CABI account you will see a pop up prompt to connect to your ORCID account.
When you click the “Connect” button, you are giving us permission to share your iD using an authenticated process: either by registering for an ORCID iD or, if you already have one, by signing into your ORCID account, then granting us permission to get your ORCID iD by clicking on the “Sign into ORCID” button. This process ensures that you are correctly identified and securely connecting your ORCID iD. Learn more about What’s so special about signing in to your ORCID account.

Click the “Sign into ORCID” button.
Your ORCID account and your My CABI account are now connected. Your ORCID iD is added to your My CABI Profile and from now on you will be able to claim records from *Global Health* by simply signing into your My CABI account.

5. After you have completed the ORCID authentication you will immediately see a pop up box which asks you to select the author name under which you are claiming records from *Global Health*. You need to select your name from the list of authors and click the orange Claim button. It is possible to claim more than one publication simultaneously.

5. When you have successfully claimed the records on *Global Health* and added them to your ORCID account your ORCID iD has been added to your name on the abstracts of the publications you have claimed on *Global Health*.

It is also possible to view the titles of all the publications you have claimed on *Global Health* in your My CABI/ My Works page. Here you will be able to use all the usual output options such as email, export and print.
CABI Offices

Americas

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