



## Guide to searching the British American Tobacco Documents Archive

### Overview

This Guide describes the mechanics of searching, navigating search results, and saving selected results in the British American Tobacco Documents Archive (BATDA). The Guide complements the [Searching](#) section of the BATDA Web site, which explains search syntax and provides more detailed information about constructing searches. Note that the search syntax detailed in the Searching section, including fielded searches and Boolean searches, is valid for all of the search options described below.

BATDA offers three search options: Quick, Advanced, and Expert. Quick Search, available on most pages of the BATDA Web site, is ideal for first time users or for a quick exploratory search.

Advanced Search provides two options, both of which help users without experience with Boolean operators to construct more precise searches. Advanced search also offers date range limitations and sorting options. Expert search provides space for searchers comfortable creating complex Boolean searches. This Guide will address the Quick Search option first.

### Quick Search

In any of the Quick Search boxes, enter your search term(s) and click the search button (or hit enter).

A screenshot of the Quick Search form on the BATDA website. The form has a dark blue background. At the top, it says "Quick Search (please enter a word or phrase):". Below this is a white text input field containing the text "ets consultants". To the right of the input field is a yellow button with the word "SEARCH" in blue capital letters. At the bottom of the form, there are two links: "Search Fields" and "Guide to Searching", both in white text.

By default, BATDA returns documents containing ALL of your search terms. The search above retrieves documents containing both ets and consultants.

### Results Page

Search-related pages on BATDA include a special Search Menu just beneath the main menu. The Search Menu allows you to move easily between search forms and Preferences, History, and Folder. These features are described below.

The results page is the same regardless of which search form you use to enter your search. A search box containing your search term(s) appears at both the top and the bottom of the results page, making it easy to refine, correct, or otherwise adjust your search. Beneath the box are tools that enable you to add date limitations, to sort your results in six different ways, and to move between brief and long display.

Find

From  to  Sort by:

[Search fields](#)

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Query: **ets consultants** Found: **553 documents.**

First Previous   of 56 Next Last

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1. **ETS** Presentation, Singapore  
**Author:**SB  
**Document date:**19900214  
**Page count:**1  
**Bates number:**304028897 [Previous Bates](#) [Next Bates](#)  
**Search Terms In Context:** E- PresenI at :on~\_ ~~~ z Update ..rent s.: enLif ic position on: - epidemic-Logy - Inc  
broad **ETS** strategies proposed b%\* EAT and infotab. Example: Australian **ETS** action..., and by Pbiip Morris. i) L  
**consultants**  
**View:** [PDF](#) [Page-by-page](#)  
**Bookmark as:** <http://guilda.library.ucsf.edu:8080/gf/tid/rij10a99>  
[Save in folder](#)

[Search fields](#) opens a list of field abbreviations you can use to search for your terms in specific fields. See [Expanded Field Descriptions](#) for an explanation of each field and [Fielded Searches](#) for details about creating targeted searches.

The purple line highlights your search query, the number of documents found, and which of the documents are currently displayed on the results page. The First, Previous, Next, & Last links above your search results allow you navigate through your results. By default, your search results appear in a brief format that includes title, author(s), document date, page count, Bates number, and search terms in context.

Next to the document Bates number(s) appears an option that allows you to move between adjacent documents; clicking *Previous Bates* or *Next Bates* takes you to the document record for the documents with the preceding or subsequent Bates numbers. You might choose to explore nearby documents, for example, if the current document refers to an attachment but the attachment does not appear. Adjacent documents might also be relevant to your search because they came from the same file, which might have contained related documents.

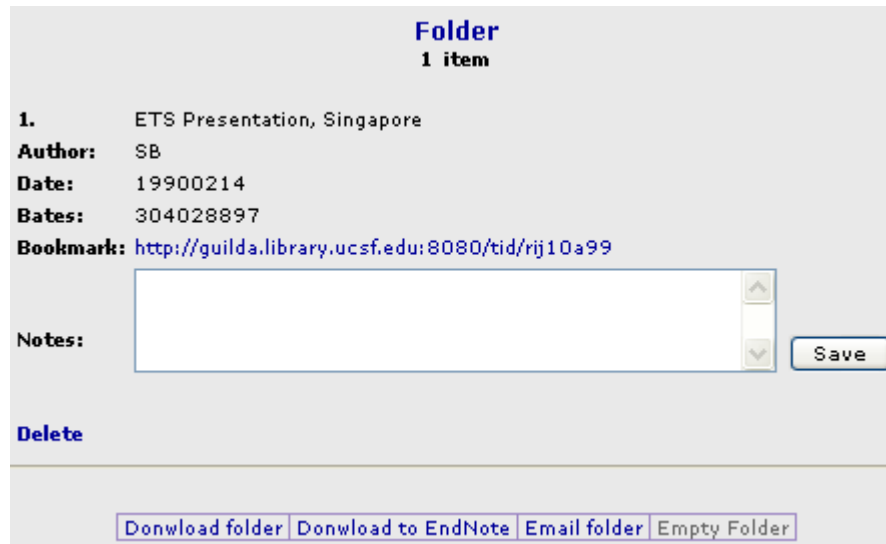
*Search terms in context* shows snippets of text to help you determine whether the document interests you. You can adjust the amount of text you see or remove it from your results altogether by changing your [preferences](#).

You can view the entire document as a searchable PDF or in a page-by-page PDF mode. The latter option exists primarily to aid users with slower Internet connections.

The bookmark provides a permanent link to the document record. Use the bookmark when citing a document.

## Folder

Each document record in your results list ends with the line *Save in folder*. Clicking the link adds a document to the folder. Save selected documents, with notes, to email, download, or import to the bibliographic software EndNote. You can add notes at any time, but you must click the save button for every note you enter.



The screenshot shows a window titled "Folder" with the subtitle "1 item". It contains a list of one item with the following details:

- 1.** ETS Presentation, Singapore
- Author:** SB
- Date:** 19900214
- Bates:** 304028897
- Bookmark:** <http://guilda.library.ucsf.edu:8080/tid/rj10a99>

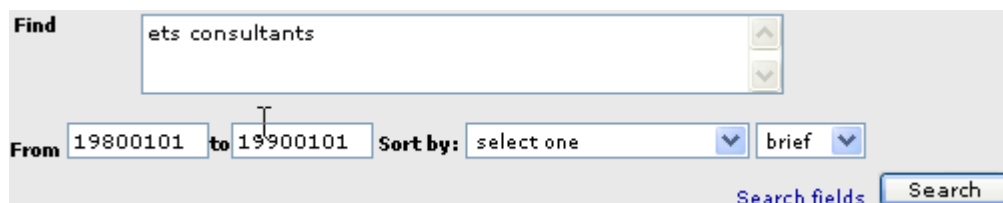
Below the metadata is a "Notes:" label followed by a text input field with up and down arrow buttons. To the right of the field is a "Save" button. Below the notes field is a "Delete" link. At the bottom of the window, there is a horizontal bar with four buttons: "Download folder", "Download to EndNote", "Email folder", and "Empty Folder".

The Folder pops up in a new window when you add a document. You can also access the Folder at any time from the *Search* menu.

## Simple Search Modifications

The search box and related tools on the results page allow you to modify your search in various ways.

Limit by date range to narrow your results. Add dates in the *From* and *to* boxes in the format *yyyymmdd*.



The screenshot shows a search interface with the following elements:

- Find:** A text input field containing "ets consultants".
- From:** A text input field containing "19800101".
- to:** A text input field containing "19900101".
- Sort by:** A pull-down menu currently set to "select one".
- Display:** A pull-down menu currently set to "brief".
- Search fields:** A link to view search criteria.
- Search:** A button to execute the search.

By default, your results are sorted by relevance to your query. Using the *Sort by* pull down menu, you can sort your results by date, page count, and date loaded descending and ascending.

Switch between brief and long display using the pull-down menu on the right.

## Preferences

Preferences allows you to customize how BATDA displays your search results. Options include setting the number of results displayed on each page, the context displayed for search terms in context, and which fields appear in brief and long display.

### Preferences

**Number of results per page:**  10  20  30  40  50  100

**Search terms in context:**  Brief view  Expanded view

**Brief Display**

<input checked="" type="checkbox"/> Title	<input type="checkbox"/> File number	<input checked="" type="checkbox"/> Bates number	<input type="checkbox"/> Box number
<input checked="" type="checkbox"/> Author	<input checked="" type="checkbox"/> Document date	<input type="checkbox"/> Document type	<input type="checkbox"/> Corporate author
<input type="checkbox"/> Recipient	<input type="checkbox"/> Corporate recipient	<input type="checkbox"/> Persons copied	<input type="checkbox"/> Named persons
<input type="checkbox"/> Named organization	<input type="checkbox"/> Language	<input type="checkbox"/> Date loaded	<input checked="" type="checkbox"/> Page count
<input type="checkbox"/> Country	<input checked="" type="checkbox"/> Search terms in context		

**Long Display**

<input checked="" type="checkbox"/> Title	<input type="checkbox"/> File number	<input checked="" type="checkbox"/> Bates number	<input type="checkbox"/> Box number
<input checked="" type="checkbox"/> Author	<input checked="" type="checkbox"/> Document date	<input type="checkbox"/> Document type	<input checked="" type="checkbox"/> Corporate author
<input checked="" type="checkbox"/> Recipient	<input checked="" type="checkbox"/> Corporate recipient	<input checked="" type="checkbox"/> Persons copied	<input checked="" type="checkbox"/> Named persons
<input checked="" type="checkbox"/> Named organization	<input type="checkbox"/> Language	<input type="checkbox"/> Date loaded	<input checked="" type="checkbox"/> Page count
<input type="checkbox"/> Country	<input checked="" type="checkbox"/> Search terms in context		

You must save your preferences for them to take effect. Your preferences remain for as long as your search session is active and for 24 hours afterwards.

## History

History helps you keep track of your research. History contains your search queries as well as the number of results each query retrieved. Clicking on the search terms will rerun a search. You can download or email your history for future reference.

### History

Click on search terms in the history list to resubmit a search

Query	Search Terms	Results
1	<a href="#">ets consultants</a>	553 results
2	<a href="#">ets consultants from: 19800101 to: 19900101</a>	71 results
3	<a href="#">latin american ets from: 19800101 to: 19900101</a>	40 results

## Advanced Search

The advanced search page comprises two forms. The first form helps you construct basic Boolean queries. It also allows you to limit by date range and to choose a sort option, if desired; both modifications are optional.

Find documents with **all** the words   
with the **exact phrase**  
with **at least one** of the words  
From  to  Sort by

**with all the words:** finds documents containing all of the words you list.

**with the exact phrase:** finds documents containing the exact words in the order you typed them.

**with at least one of the words:** finds documents containing at least one of the words you list.

Please note that you can use only one of these three boxes per search.

The second form on the Advanced Search page allows you to combine search terms using Boolean operators and also allows you to specify in which field(s) the term(s) should appear. For example, you can search for documents with certain authors and with certain words in the document title.

Find documents   
  
  
From  to  Sort by   
author  AND   
entire record  AND   
title  AND   
entire record  AND   
entire record  AND   
entire record

## Expert Search

Expert search provides ample space for users comfortable constructing complex Boolean queries. See [Boolean Operators](#) for more information about Boolean searching.

Find documents   
From  to  Sort by