



**U.S. Pharmacopeia**  

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**Pharmacopeial Forum**

**USP-PF Online  
Quick Start Guide**

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## GETTING STARTED

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This Quick Start Guide will help you get started using the United States Pharmacopeia (USP) Pharmacopeial Forum (PF) online application. The guide explains the application requirements, login and logoff procedures, and the application's window layout. The guide also provides an overview of the following PF online features:

- Search Current Issue and Advanced search features
- My PF feature, used to store bookmarks and save search results
- Print functionality

This guide can be read as a PDF file or printed for future reference. Although most information is defined and the application is straight-forward, a basic knowledge of pharmaceutical terminology is expected.

### Document Conventions

Within this guide, some text appears in different fonts, sizes, and weights.

- **Boldface** type is used throughout the document to emphasize a topic or to alert you to a title or name. Boldface type is also used in procedures to designate key or button selections, typed text, or menu option selections.
- Hyperlinks appear in underlined text, in either light blue or purple
- Note textboxes appear throughout to provide additional information or tips on a topic.

### Technical Requirements

For optimal performance, the following settings are required:

#### System Requirements

- Windows Vista, XP, or Windows 7
- Pentium II processor, 350 MHz or faster
- 128 MB RAM or more
- 30 MB free disk space
- SVGA video or better monitor (800x600 minimum resolution)

#### Browser Requirements

- Microsoft Internet Explorer® 6, 7, or 8
- Scripting must be enabled (JavaScript)
- Style Sheets must be enabled
- Cookies must be set to "Accept All."
- Pop-up blockers must be disabled.

\* These settings are the typical default settings and need only to be changed in rare instances. Refer to your browser's documentation for instructions on changing these settings.

## LOGIN AND LOGOFF

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When launching PF online, the first page displayed is the Login page. The Login page also re-displays after one hour of inactivity in the application. If your session expires, you will be prompted to log in again.

The Login page requires the use of a username and password. If you have lost or forgotten your password, click on the **Forgot your password** hyperlink, and your password will be sent to the email address you provided during registration.



## Logging On

To log in, type your email address (or user name) and password in the labeled fields and then click **Log On**. Your user name will be visible as you type it. For security reasons, however, your password will be encrypted when you type it. Keep in mind: Passwords are case-sensitive.

## Logging Off

To log off, click the **Logout** link located in the application toolbar. This link logs you out of your current session and returns you to the Login page.

## MANAGING YOUR PROFILE

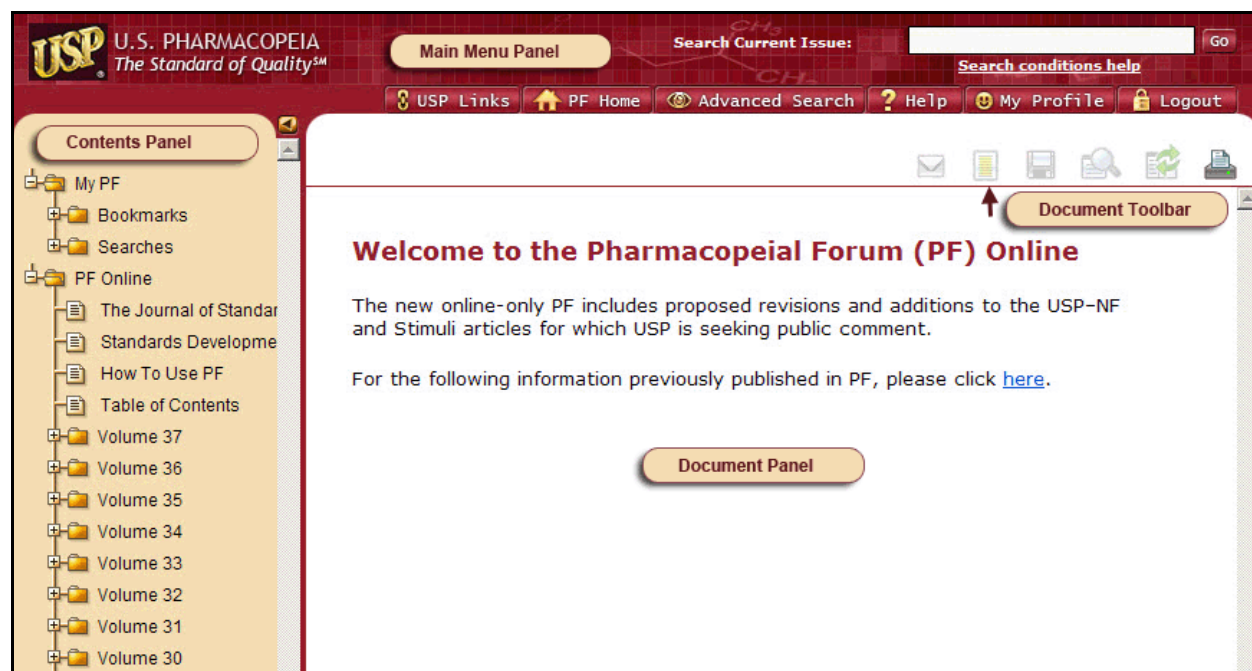
From the Online PF application, you can access and update your registration profile (e.g., company, address). On your profile page, you can also select to register for other free USP publications.

To update your profile

1. Click on the **My Profile** tab in the [Main Menu bar](#).
  - The registration page opens, pre-populated with all your current information.
2. Edit fields as needed. Ensure that all required fields (at top of the form) are completed.
3. Click the **Submit** button to save your changes.







## USP-PF ONLINE HOME PAGE

The Home page is the first screen you see when you log on to PF online. The Home page is divided into the following three sections: Main Menu Panel, Contents Panel, and Document Panel.





## Main Menu Panel



The Main Menu Panel is displayed at the top of all USP PF application windows. It contains a Search feature and the following Main Menu buttons and links.

Icon	Function
	Provides a dropdown menu that allows you to link to external USP sites providing reference standards information, highlights of past issues of the PF, and USP contact information.
	Reloads the PF home page and refreshes the table of contents.
	Allows you to define more advanced search criteria.
	Launches the online Help.
	Launches a registration profile form pre-populated with your information.
	Logs you out of the PF online application.

## Contents Panel

The Contents Panel is displayed on the left-hand side of the page. The Contents Panel lists the document sections (denoted with a folder  icon); each of those sections contains topics (denoted with a document  icon).







- Click on a folder to reveal the topics within that section. Click on the folder again to hide the topics.
- Click on a topic to open that document in the Document Panel.

**NOTE** Internet Explorer users can close and re-open the Contents Panel by clicking on the  and  buttons located at the top of the panel.

## Document Panel

When PF online is launched, the Document Panel initially displays a splash screen. Afterwards, the Panel displays a document selected from the Contents Panel or search results, if a document search has been performed.

The Document Panel contains a Document toolbar, located at the top of the panel. The toolbar includes the following six functional icons:

Icon	Name	Function
	Email Comments	Enables you to submit comments on a monograph or other scientific item to USP.
	Toggle Highlights	Turns on/off the highlighting of search term(s) found within a selected document.
	Save to My PF	Used to save search results or to bookmark a document.
	Display Document	Displays the current document in a new window.
	Sync TOC	Displays the location of an open document in the Contents panel.
	Print Document	Used to print a document or selection of a document.

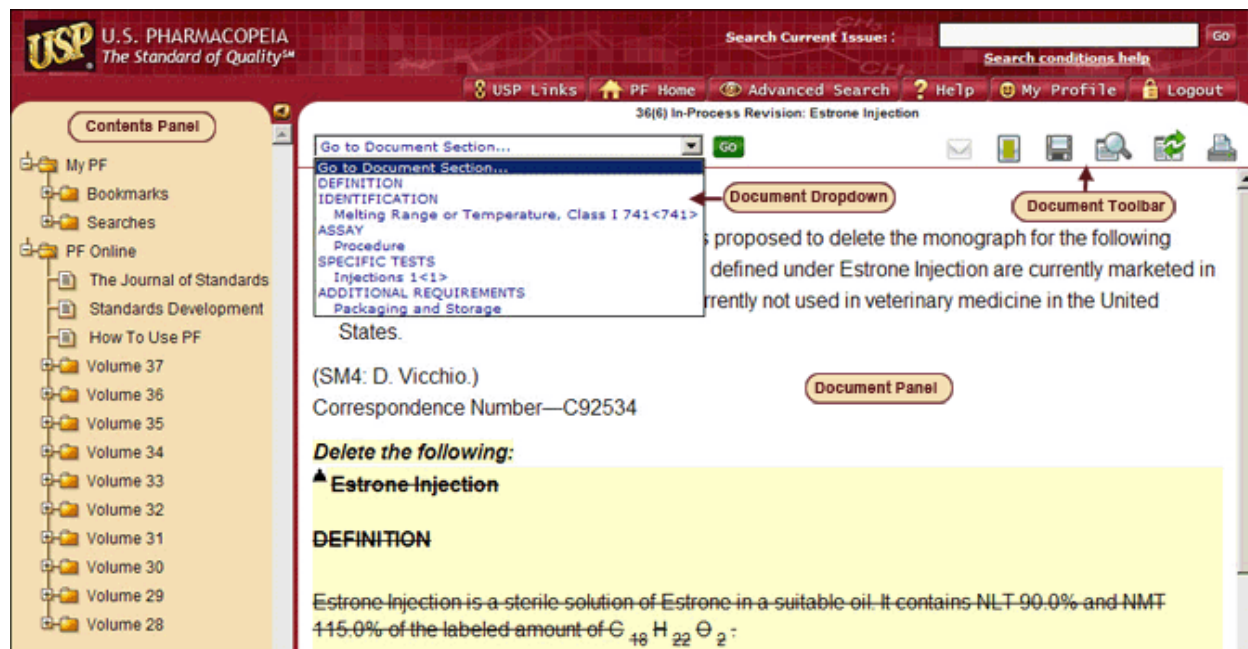
## ACCESSING DOCUMENTS AND IMAGES

The following sections describe how to display and bookmark documents, display and save document images, and print documents.

### Working with Documents

You can access a document several ways:

- By selecting one of the topics from the Contents Panel.
- By searching for a topic using the Search Current Issue or Advanced Search links in the Main Menu Panel. (For more information on searches, see [Using Search Current Issue/Advanced Search](#).)



### Displaying a Document

To display a document from the Contents Panel

1. Click on the section folder icon in which the document is located.
  - A list of documents contained within that section displays.
2. Click on the document icon.
  - The document displays in the Document Panel.

**NOTE** You can opt to display the open document in a new window by clicking on the icon in the Document Toolbar.

If a document has multiple sections, a Document Section dropdown box, containing a list of sections, appears at the top of the Document Panel. To display another section of the document, select a topic from the list and click **GO**. The Document Panel scrolls to that section.


**NOTE** Revisions to a document/monograph are now indicated with yellow highlighting, making it easier to locate areas of change.

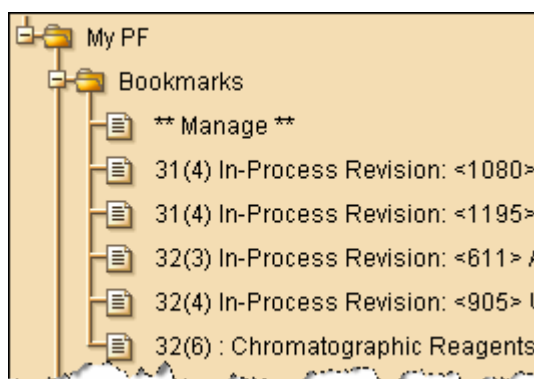
To display the location of an open document within the Contents Panel, click on the Synchronize TOC icon in the Document toolbar. The table of contents refreshes to show the location of the document, with the document name displaying in bold font.

## Bookmarking a Document

When you find a document that you want to reference later, you can bookmark it for later access. Bookmarked documents are saved to the [My PF](#) folder, the top folder in the Contents Panel, where they can be easily re-accessed.

To create a bookmark

1. Display a document.
2. Click the  icon, found in the Document toolbar, to bookmark the document.
3. The title is automatically filled in. Click **OK**.
4. A confirmation screen displays, indicating your bookmark was saved. Click **Close**.
5. Your bookmark is added to the list in the **Bookmarks** folder in the Contents Panel.







## Working with Images

When you open a document that includes an image, you can view the image in a separate pop-up window, as well as print or save the image. Within the image pop-up window, you can increase or decrease the size of the image.

### Displaying an Image

To view the image in a separate pop-up window

1. Click on the image. The image will open in a new window.
2. To enlarge the image, click the  icon repeatedly. To shrink the image, click  icon repeatedly.
  - Clicking on the image itself also allows you to repeat the zoom action.
3. To print the image, click the print  icon in the upper right corner.
4. To close the image pop-up window, click the  in the upper right corner.

### Saving an Image


To save the image as a graphic file

1. Right-click on the image.
2. Select the **Save Picture As** option from the pop-up menu.
3. Specify a name and location for the image file in the Save Picture settings window.
4. Click **Save**.

**NOTE** This procedure may differ when using a browser other than Internet Explorer.

## Printing Documents

To print a document

1. Click on the print icon  from the Document toolbar.
2. Select your print options in the Print settings window.
3. Click on the **Print** button.

**NOTE** To print the any document highlighting, you will need to set your browser options to "Print Background Colors and Images." Refer to the online Help for additional instruction.

## USING THE SEARCH FEATURE

To display documents, you can perform a search or you can access a document directly using the Contents Panel. The search option allows you to retrieve documents that contain specific keywords or phrases. The PF online application offers two types of searches:

- **Search Current Issue** – Enables you to search the current issue of PF.
- **Advanced Search** – Enables you to limit your search to specific document types or sections, such as monographs, chapters, or chromatographic reagents across multiple PF issues.

### Search Conditions

Search conditions allow you to use characters, symbols, or words to enhance your search. PF online supports the use of the following four types of search conditions, within specific guidelines:


- **Boolean** – Lets you use the *AND* and *OR* connectors to expand or limit a search.
- **Phonetic** – Lets you perform a search based on the sound, rather than spelling, of a word.
- **Proximity** – Lets you specify the number of words between your keywords.
- **Wildcard** – Lets you search for multiple variations of a keyword by substituting \* or ? for missing characters.

**NOTE** For guidelines on using these search conditions, refer to the PF online Help, accessed by clicking on the **Help** button in the Main Menu Panel.

### Using Search Current Issue

Accessed from the Main Menu Panel, the Search Current Issue feature allows you to search the current issue of PF for a particular term(s).

To perform a quick search

1. Type one or several words, in the **Search Current Issue** box. (The volume/issue no. of the current issue displays to the left of the field.)The screenshot shows a dark red search box with the text "Search Current Issue:" on the left, a white text input field in the center, and a red "GO" button on the right.
  - You may enter any combination of alphanumeric characters.
  - You can use any of the four types of search conditions in the Search text field.
2. Click **GO** to start the search.
  - The Document Panel displays a list of documents meeting your search criteria. By default, each search results page displays a maximum of 25 documents.
3. To display a document, click on the document title.

### Using Advanced Search

Accessed from the Main Menu Panel, the Advanced Search feature allows you to search for a term(s) in a specific document, document section, or monograph. You can also specify the number of results to appear per page.

The Advanced Search button launches the Advanced Search window, which has the following six category tabs: **Monographs**, **Chapters**, **Reagents**, **Reference Tables**, **Other/Misc**, and **All Sections**. Each tab displays a different set of search fields. Some fields feature dropdown menus from which you select criteria; others are free or full text fields in which you enter search criteria.

**NOTE** The Advanced Search tab has a ? icon in the top right corner. Click on this icon to information on using the search options and how to use search conditions.

**NOTE** Searches on some keywords like “dosage form” may return documents that do not appear to have any instances of the term in them. In these cases, the term was found in the information pertaining to the document, but not in the portion displaying on the screen.

To perform an advanced search

1. Click on the



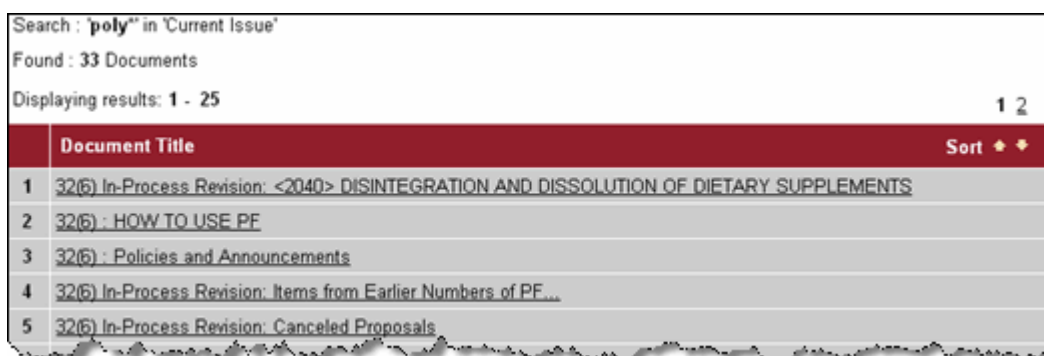
button.

- The Advanced Search window displays.
2. Select a search category from the tabs aligned on the left side of the window.
    - The Monograph tab is displayed initially, by default.
  3. Select search criteria from the dropdown fields or enter search criteria into the blank search fields.
    - The more search fields you complete, the more you will narrow your search.
    - When searching in free text search fields, you can use Boolean and Wildcard search conditions to refine your search.
    - You can search for a text string by enclosing the text within quotes, e.g., "molecular weight".
  4. Accept the default setting (25) or enter another number to change the setting for results displayed per page.
  5. Click **GO** to start the search. The Document Panel displays a list of documents meeting your search criteria.
    - To clear the search fields of any entries, click **RESET**.
  6. To display a document, click on the document title. (For more information, see “Viewing Search Results”.)

A screenshot of the "Search in Monographs" window. It features a sidebar with tabs: "Monographs" (selected), "Chapters", "Reagents", "Reference Tables", "Other/Misc.", and "All Sections". The main area contains search criteria fields: "Volume" (dropdown), "Issue" (dropdown), "PF Section" (dropdown), "Document Type" (dropdown), "Drug Name" (text), "Definition" (text), "Dosage Form" (dropdown), "Monograph Section" (text), "Full Text" (text), and "Results/Page" (input field with "25"). At the bottom are "Reset" and "Go" buttons.


## VIEWING AND SAVING SEARCH RESULTS

After you perform a search, the search results display in the Document Panel. The search criteria used and the number of matching documents found are shown at the top of the page.

A screenshot of search results for the query "poly" in the "Current Issue". It shows 33 documents found, with results 1-25 displayed. The results are listed in a table with columns for document number and title. The first five results are:



	Document Title	Sort
1	32(6) In-Process Revision: <2040> DISINTEGRATION AND DISSOLUTION OF DIETARY SUPPLEMENTS	♦ ♦
2	32(6) - HOW TO USE PF	
3	32(6) - Policies and Announcements	
4	32(6) In-Process Revision: Items from Earlier Numbers of PF...	
5	32(6) In-Process Revision: Canceled Proposals	

To display a document, click on the document title. Within the document, the search keywords are highlighted. For example, for a search for the text string "water soluble," all occurrences of the word "water soluble" will be highlighted, as well as the words "water" and "soluble". If no results were found, a message displays stating no matching documents were found.

**NOTE** You can turn off the highlighting in the document by clicking on the Toggle  icon in the Document Toolbar. To redisplay the highlighting, click the icon again.

## Sorting Search Results

You can use the sorting arrows, displayed at the top of the search results page, to resort the order of the documents listed.



1. Click  to sort the list in ascending order OR click  to sort the list in descending order.
2. Click the opposite arrow to reverse the order of sorting.

## Viewing the Next Group of Results

Each search results page displays a maximum of 25 documents per page, by default. (Note: You can change this setting in the Advanced Search option.) If the list of search results exceeds one page, grouped numbers (e.g., 1 2 3 4 5) appear sequentially at the top and bottom of the page. Each number acts as a hyperlink to a different page of search results.

## Viewing Search Results in a Separate Window


You can opt to display the search results in a separate browser window, which enables you to select and view documents in the Document Panel without closing the search results page.

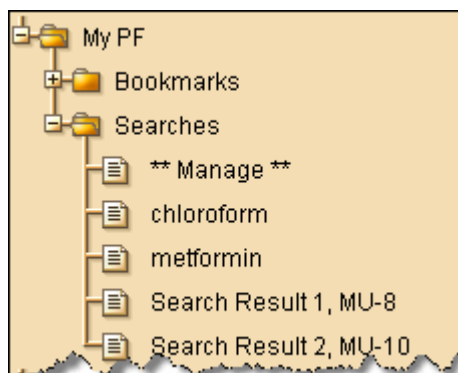
1. From the search results page, click the  Show Results List button, located on the Document toolbar.
  - The search results appear in a separate window.
2. To close the search results window, click on the  icon at the top of the window

## Saving Search Results

If you have done a search and want to save the results for future reference, you can save your results using the My PF feature. Search results are saved to the **My PF** folder, the top folder in the Contents Panel, where they can be easily re-accessed.

To save a search

1. Perform a search using either the Search Current Issue or Advanced Search feature.
2. After the search results are displayed, click the  icon, found in the Document toolbar, to save the results.
3. Type a title and click **OK**.
4. A confirmation screen displays, indicating your search was saved. Click **Close**.

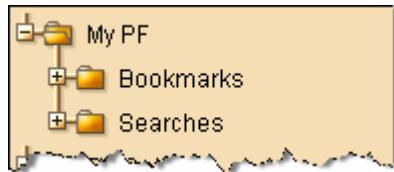



5. Your search results document is added to list in the **Searches** folder in the Contents Panel.

## My PF

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The My PF feature allows you to redisplay, edit, and manage your bookmarks and saved search results. You can access your bookmarks and saved searches via the **My PF** folder located at the top of the Contents Panel.



For more information on re-displaying and managing bookmarks and saved searches, refer to the PF online Help, accessed by clicking on the  button in the Main Menu Panel.

**NOTE** My PF allows you to save a maximum of 100 items. Those items can be bookmarks, saved searches, or a combination of both, as long as the 100-item limit is not exceeded.

## HELP RESOURCES

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### Technical Support

Should you encounter technical problems using PF online, the USP support team is available to help you. USP technical support is free to all licensed users. You can reach us via phone, fax, or email during our standard business hours of 9:00 a.m. - 5:00 p.m. (EST), Monday through Friday.


**Phone:** 800-822-8772, ext. 8291

**Email:** [support@usp.org](mailto:support@usp.org)

**FAX:** 301-816-8301

**Web site:** <http://www.usp.org/support>

### Additional Help Resources

**Online Help** – Provides more detailed information on using the various features of the PF online application, such as using search conditions and managing bookmarks and saved searches. You can browse the Contents panel in the Help for a list of topics, scan the index for a particular subject, or search for a keyword using the Search button. To access the help, click on the  icon in the Main Menu Panel.

**USP Pharmacopeial Forum [support web site](#)** – Contains additional FAQs and technical requirements information.