

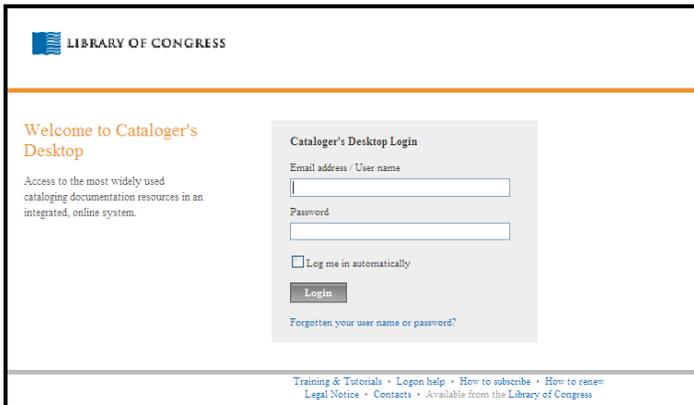
Cataloger's Desktop:
A Comparison of Versions
CD3 and CD4 (2014)

Anna M. Ferris
University Libraries
University of Colorado at Boulder
Norlin Library, Metadata Services Dept.

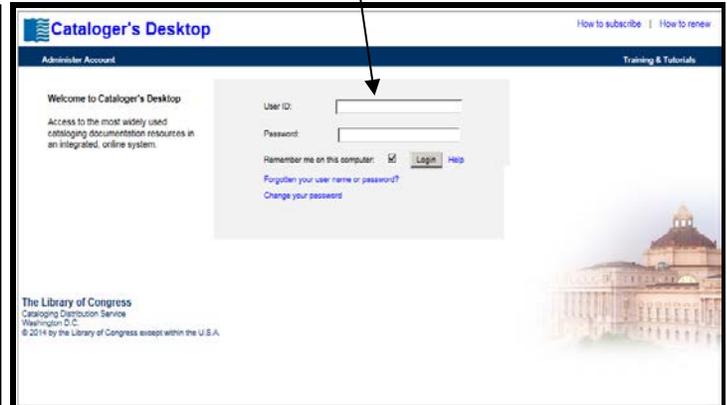
September 18, 2014

INITIAL LOGIN

The login procedure for **CD4** is the same as it was for **CD3**—only a personal email address and password are required. Use <https://desktop.loc.gov/> to log in.



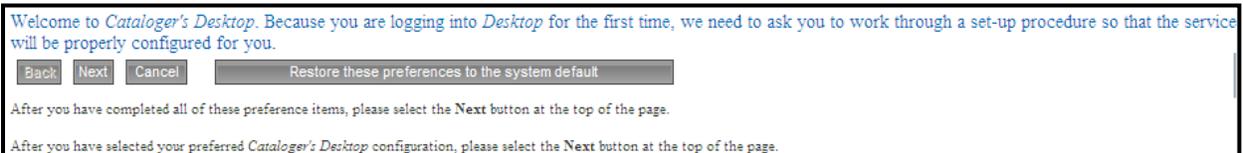
(CD3—Login Screen)



(CD4—Login Screen)

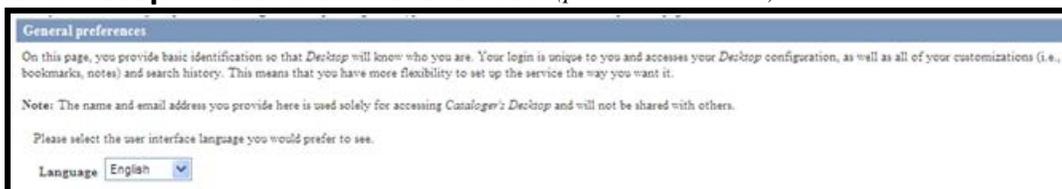
CD3 (Preferences Set Up)

When logging into **CD3** for the first time, users were prompted to set up their Preferences (i.e., the list of cataloging resources they will access most often) by means of a three-step process.

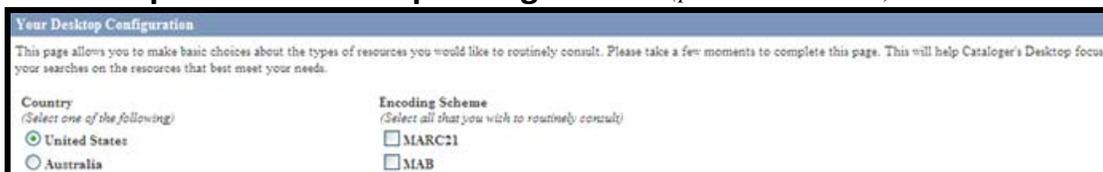


(CD3—Initial Login Prompt to Set Preferences)

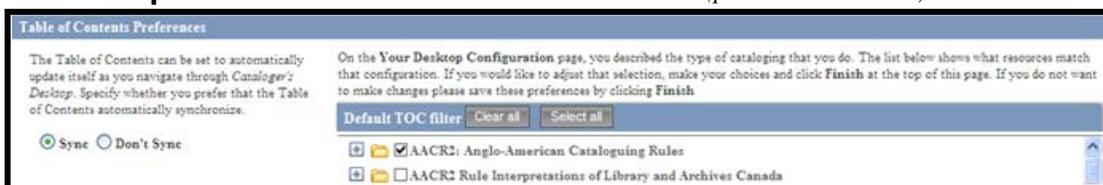
CD3—Step 1: General Preferences: (partial screen view)



CD3—Step 2: Your Desktop Configuration: (partial screen view)

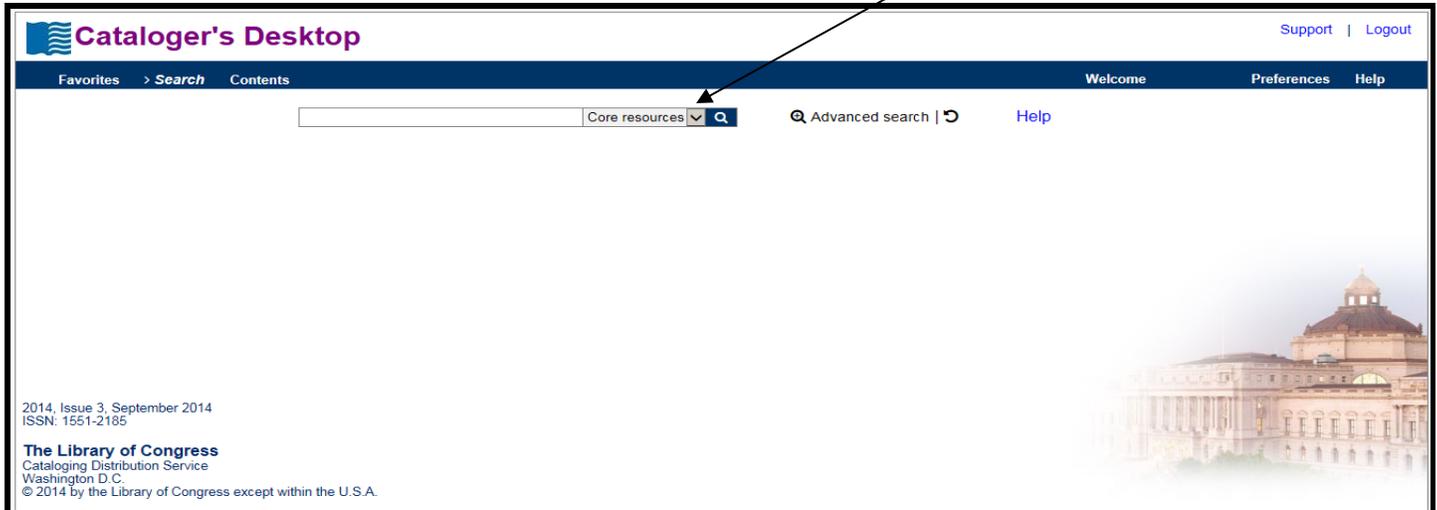


CD3—Step 3: Table of Contents Preferences: (partial screen view)



CD4 (Preferences Set Up)

When logging into **CD4** for the first time, users are *not* prompted to set up their Preferences as with **CD3**. They are greeted instead by a simple search box with “*Core resources*” selected as the default search set. From here, users may begin searching straightaway.



The resource types in **CD3** were configured in three categories:

Table of Contents (All resources)

Table of Contents (My resources)

Table of Contents (LC resources)

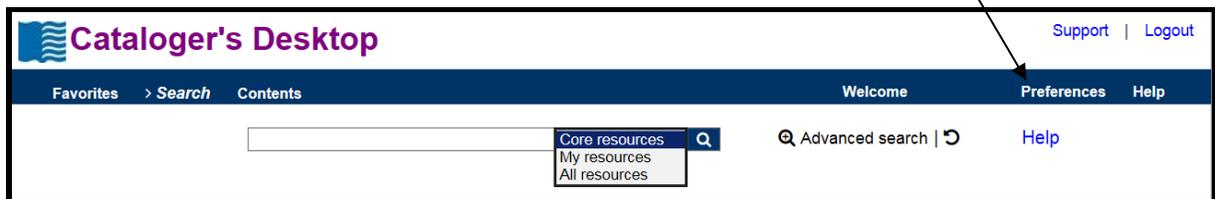
CD4 has a similar configuration with a newly upgraded set of *Core Resources*.

Core Resources: 25 pre-defined resources used most frequently by *Desktop* subscribers

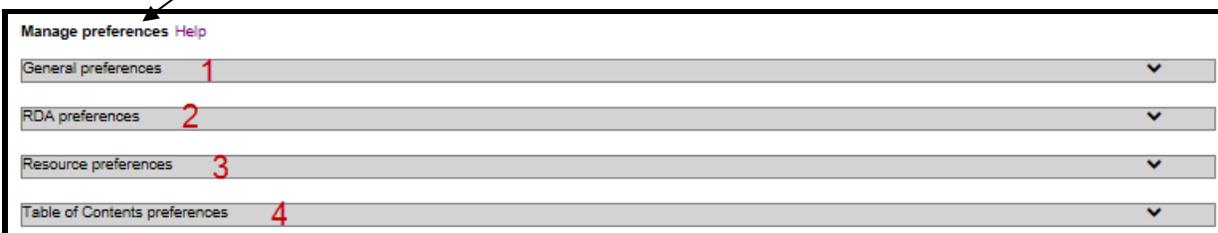
My Resources: A customized list of resources a user will consult on a routine basis

All Resources: 300+ resources of the most widely used standard cataloging documentation

Users may change the default resource type setting by clicking *Preferences*.



This will open the *Manage Preferences* screen from which users can customize *Desktop* and select the resources they will access most often.



CD4 (Preferences Set Up) (Cont'd.)

GENERAL PREFERENCES (1): Change resource type setting here. Then click “Apply.”

General preferences

Language: English

First Name: Anna

Last Name: Ferris

Number of hits: 20

Inactivity timeout: 30 minutes

Warn before timeout: 5 minutes

Default homepage: Search (selected), Contents

Default resource set: My Resources

Interface language: Please select the user interface language you would prefer to see.

Your name: Please specify your first and last names. Note: The names you provide here are used solely for accessing Cataloger's Desktop and will not be shared with others.

Search results: Please specify the number of hits to display per search results page.

Session timer: Specify how long your Cataloger's Desktop session should last.

Default homepage: Select whether you want the Search page or the Contents page as your homepage.

Default resource set: Select what resource set you want to search by default.

Apply Cancel Restore to default

RDA PREFERENCES (2): Use institution login and password here.

RDA preferences

RDA Username: [input field]

RDA Password: [input field]

RDA: Enter your RDA Username and Password in order to access the RDA resources. Note: If you do not have an RDA login, click [HERE](#) to sign up for RDA.

Apply Cancel Restore to default

RESOURCE PREFERENCES (3): Select *types* of resources used here.

Resource preferences

This page allows you to make basic choices about the type of resource you would like to routinely consult. Please take a few moments to complete this page. This will help Cataloger's Desktop focus your searches on the resources that best meet your needs. Your choices in this section affect what is available on the Table of Content Preferences section.

Language of resources (choose all that apply):
 English Deutsch Español Français Italiano
 Korean Português Suomi Svenska

Classification (choose all that apply):
 LCC Dewey NLM UDC

Subject headings:
 LCSH MeSH

Material type (choose all that apply):
 Books Electronic resources Moving images
 Cartographic materials Metadata Rare materials
 Graphic materials Music & sound recordings Serials & integrating resources

Apply Cancel Restore to default

TABLE OF CONTENTS PREFERENCES (4): Select most-used *documentation* here.

Table of Contents preferences

In the Resources preferences section, you described the type of cataloging that you do. The list shows what resources match that configuration. If you would like to adjust that selection, make your choices and click on the apply button at the bottom of this panel.

AACR2 Rule Interpretations of Library and Archives Canada
 AACR2: Anglo-American Cataloguing Rules
 AAT: Art & Architecture Thesaurus (Getty Institute)
 Agricultural Thesaurus (National Agricultural Library)
 ALA-LC Romanization Tables
 All Movie Guide (All Media Guide)
 All Music Guide (All Media Guide)
 American Antiquarian Society Catalog
 Amicus (Library and Archives Canada)
 AMIM: Archival Moving Image Materials
 Anonymous Classics: a list of uniform headings for European literatures (IFLA)
 Anonymous Classics: African Literature (IFLA)
 Arabic Cataloging Manual (MELA)
 Arabic Cataloging Manual (Princeton University)
 Arabic NACO Manual (Princeton University)
 Arabic Union Catalog
 ArtLex: Art Dictionary (Michael Delahunt)
 Authorities & Vocabularies
 Authority Tools for Audiovisual and Music Catalogers (OLAC)
 Autocat (Syracuse University)
 BC Geographical Names (BC Integrated Land Management Bureau)

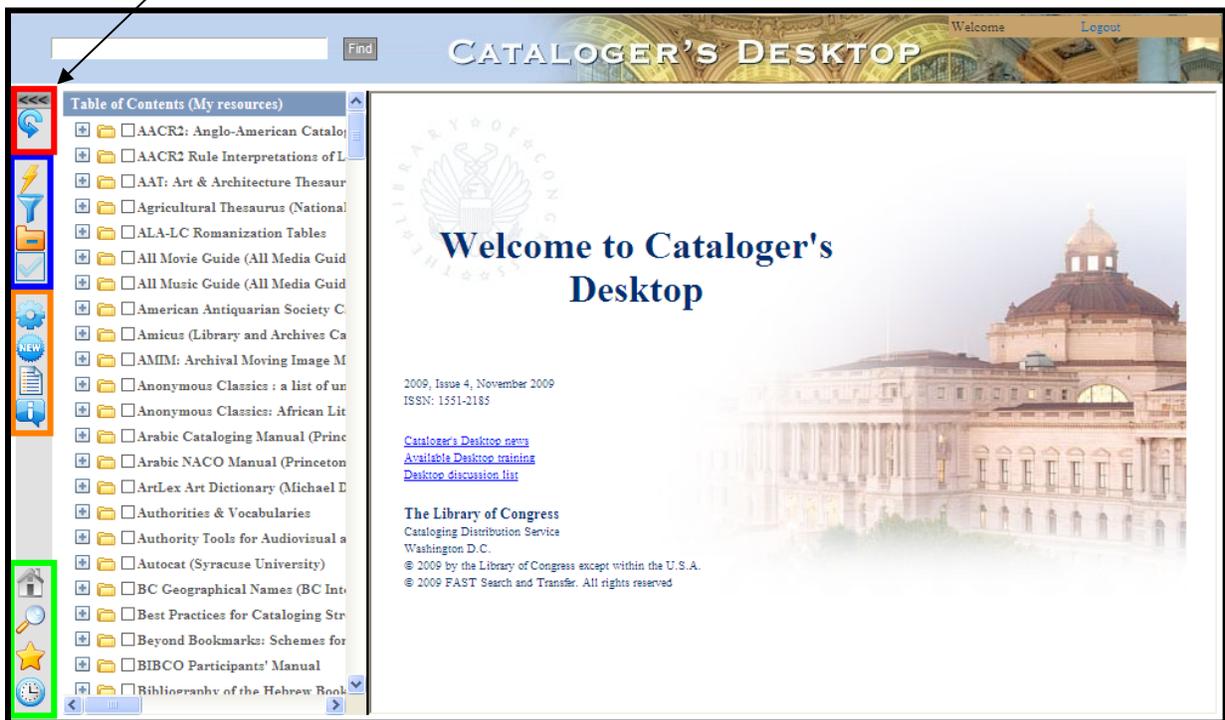
Clear All
Select All

Apply Cancel

NOTE: The resources checked in the *Table of Contents Preferences* (4) will be displayed as *My Resources* from hereon in. Once users have configured all their *Preferences*, they should not have to return to these set up screens again.

NAVIGATION

With CD3, users performed certain functions and navigated in *Desktop* by using icons* on *The Rail*, a vertical sidebar found on the left side of the Table of Contents pane.



(CD3—The Rail)

*The icons shown above are divided into color-coded sections for the purpose of this demonstration.

The next section shows the former CD3 functions icons and their corresponding icons in CD4.

CD3 FUNCTIONS



Hide/Show Rail Pane:

Used to hide or display the TOC pane

CD4 FUNCTIONS

Hide/Show Contents: Used to close TOC in document view



Start Over: Returns to beginning



Start Over: Returns to blank Search screen

> Search Returns to a particular search term

CD3 FUNCTIONS



Quick Tasks: Used to support specific cataloging tasks or special searches

Quick tasks:	
I want to . . .	Find a MARC code
Find a bib record	Countries
Build a bib record	Geographic Areas
Find a name record	Languages
Build a name authority	Organizations
Describe a work in hand	Relators
Describe a web resource	Search a Discussion list
Find a subject	Autocat
LCSH	CONSERline
MeSH	Desktop
Find a genre term	LC Cataloging Newsline
Assign a call number	MARC
Dewey	NextGenCat
LCC	PCCList
NLM	RDA-L
UDC	Serialist
Find a MARC 21 tag	
Authority	
Bibliographic	
Holdings	

CD4 FUNCTIONS (Cont'd.)

Browse by Task: found under **Contents**

Browse by Title | Browse by Material Type | **Browse by Task**

- Authority Control
- Classification
- Descriptive Cataloging
- Subject Headings

Cataloging Task: found under **Contents**

Cataloging Task ▼

- Authority Control (1)
- Descriptive Cataloging (1)



Quick Filters: Used to temporarily consult types of materials users do not catalog on a routine basis

Quick filters
Show all resources
Show my resources
Show LC resources
I need information about cataloging ...
Everything
Cartographic materials
Electronic resources
Metadata
Motion pictures
Music & sound recordings
Print & photographs
Rare materials
Serials & integrating resources

Browse by Title | **Browse by Material Type** | Browse by Task

- Books
- Cartographic materials
- Electronic resources
- Graphic materials
- Metadata
- Moving images
- Music & sound recordings
- Rare materials
- Serials & integrating resources

Resource filter: found under **Contents**

Resource filter | **My resources** ▼

Use the menu's down-arrow to select which set of resources to view or search.

Browse by Material Type: found under **Contents**



Collapse TOC:

Used to compress the TOC after it has been expanded



Clear TOC Checkboxes:

Used to un-check selected resources

Clear/Collapse all: found after performing a search

Clear all — Collapse all

CD3 FUNCTIONS



Preferences:

Used to refine the list of resources most relevant to a user's needs



General Preferences

Used to establish a user's identification for login purposes



Your Desktop Configuration

Used to specify the type of cataloging a user will perform routinely



Table of Contents Preferences

Used to set the list of resources a user will be consulting most often

CD4 FUNCTIONS (Cont'd.)

See **CD4 (PREFERENCES SET UP)** above



What New?

Provides alerts to changes made to resources in the current issue

What's New? found under

[Support](#)

Acknowledgments
Acronyms
Contact Us
Feedback
Training & Tutorials
[What's new?](#)



Cataloger's Desktop Acronyms:

Used to clarify resource titles in the TOC pane

Cataloger's Desktop Acronyms: found under

[Support](#)

Acknowledgments
[Acronyms](#)
Contact Us
Feedback
Training & Tutorials
What's new?



Help:

Used to access training resources and other informational documents

Help links are found throughout *Desktop*

[Help](#) [Help](#) [Favorites](#) [Help](#) [Manage preferences](#) [Help](#)

Training resources: found under

[Support](#)



Table of Contents:

Used to return to the TOC list from the **Preferences**, **Hit List**, **Bookmarks**, or **Session History** panes

Back to Search Results:

Used to close TOC in document view

[« Back to search results](#)

CD3 FUNCTIONS

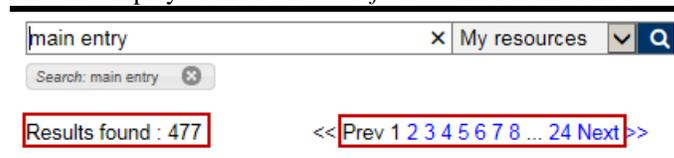


Hit List:

Used to display the search results or “hits” after a search is performed

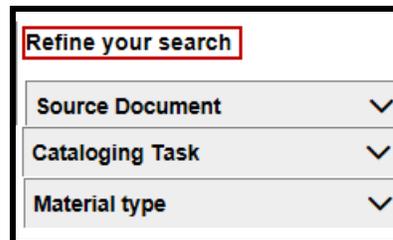
CD4 FUNCTIONS (Cont'd.)

Hits are displayed under “*Results found*” after each search



Drill-Down: Used to pinpoint the most relevant resources for a search

See **Facets** which allow users to refine their searches further



Clear Search: Used to clear the search box and return to TOC pane



Start Over: Returns to blank Search screen



Bookmarks & Saved searches



Session History

Bookmarks, Saved Searches & Session History functions are discussed in the next section:
FAVORITES

FAVORITES

In **CD3**, users were able to customize their preferred resources by creating bookmarks, adding notes, and saving search strategies for future reference.



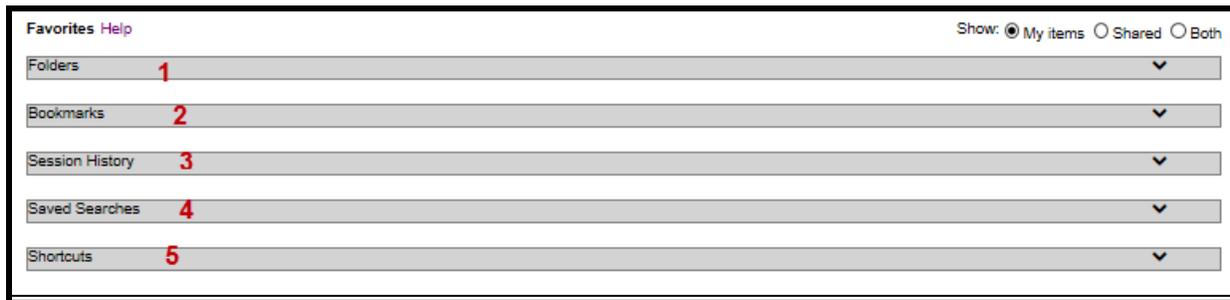
(CD3—Document Toolbar)

In **CD4**, all of these customizations are available with the addition of two new enhancements that allow users to create URL hyperlinks for *shortcuts* and to organize specific information into *folders*. Click on *Favorites* to access these customizations.

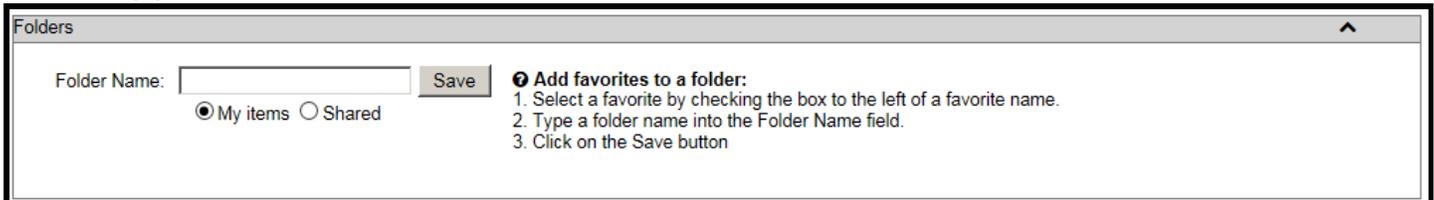


FAVORITES (Cont'd.)

The *Favorites* functions can be accessed from one central location.



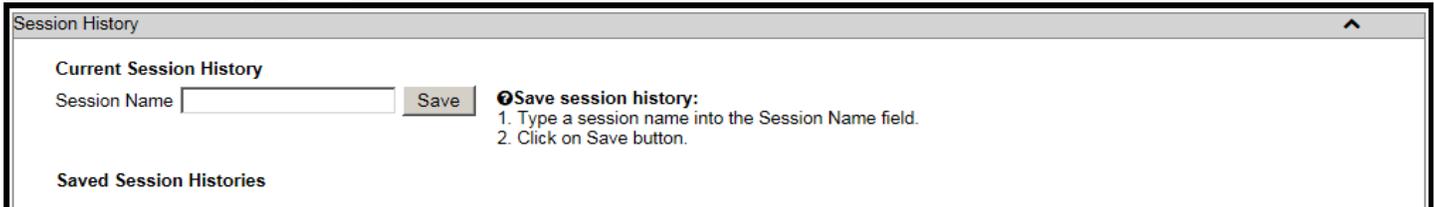
FOLDERS (1): An item must be created in another function before it can be inserted into a folder.



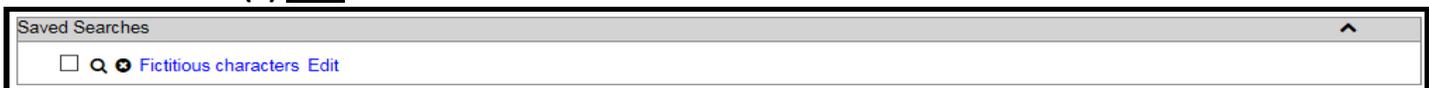
BOOKMARKS (2) : This function was available in CD3. Bookmarks may be inserted into a folder.

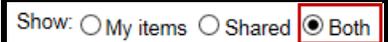


SESSION HISTORY (3) : This function was available in CD3.

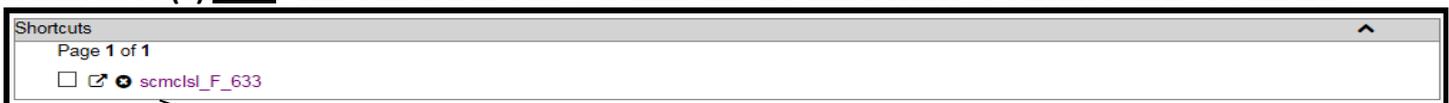


SAVED SEARCHES (4) : This function was available in CD3.



(NOTE: In order for saved search titles to display, click the *Both* button )

SHORTCUTS (5) : This function creates web links that are transferrable to other locations/documents.



You can copy this web address:

http://desktop.loc.gov/saved/F_633__Literary_Authors:_Subarrangement_of_Works

or create a shortcut by dragging the following link to your computer's desktop:

[F_633__Literary_Authors:_Subarrangement_of_Works](http://desktop.loc.gov/saved/F_633__Literary_Authors:_Subarrangement_of_Works)

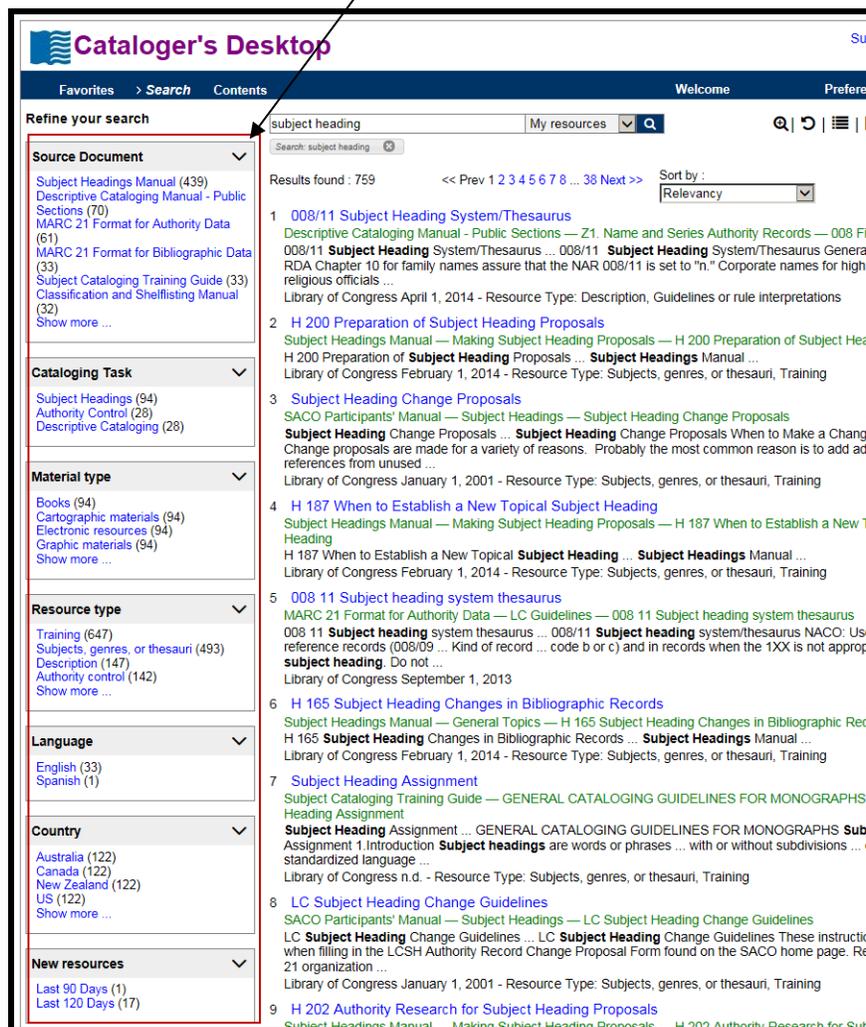
SEARCHING

In CD4, the resources selected in a user's *Table of Contents Preferences* will have a major effect on which resources display first when initiating a search. **NOTE:** Each of the three resource type categories is still readily accessible from the drop-down box next to the search box.



FACETS

CD4 has enhanced navigation by providing *faceted* searching that allows users to refine or "filter" their search results according to seven pre-determined categories.



Search results are color-coded as follows:

Blue = Section/document title **Green** = Citation within section (*breadcrumbs*) **Black** = Text sample

H 1610 Fictitious Characters
 Subject Headings Manual — Special Topics, Materials, Subdivisions, Etc. — H 1610 Fictitious Characters
 H 1610 **Fictitious Characters** ... H 1610 **Fictitious Characters** BACKGROUND: **Fictitious characters** may have names that resemble personal names or they may have names that are descriptive phrases or nicknames. Traditionally ... all ...
 Library of Congress June 1, 2014 - Resource Type: Subjects, genres, or thesauri, Training

SEARCHING (Cont'd.)

CONTENTS

CD4 has enhanced searching by providing three distinct ways in which users can browse the table of contents of all resource types. The *Contents* browse options are organized as follows: (a) alphabetically by Title; (b) by the Type of Material being cataloged; or (c) by the nature of the Cataloging Task being performed.



ADVANCED SEARCH

 Advanced search

CD4 provides an *Advanced Search* option that allows users to focus their searches according to classification numbers, subject headings, MARC tags/codes, and cataloging discussion lists.

Select only one advanced search function. Then type your keyword search in the box at the bottom of the window and click the Search button.

Classification number assignment	<input type="text" value="Select a classification number system"/>	Find a MARC tag	<input type="text" value="Select MARC format"/>
Subject heading assignment	<input type="text" value="Select subject list"/>	Find a MARC code	<input type="text" value="Select MARC code"/>
Search a discussion list	<input type="text" value="Select a list"/>		
Find resources to support a task	<input type="text"/>	<input type="button" value="Search"/>	Help

MISCELLANEOUS

CD4 Document Toolbar:



Open new window (New icon)



Search History (New icon)



Print



Bookmark



Email



Shortcut (New icon)

RDA Toolkit:

CD4 provides direct access to the *RDA Toolkit*. This allows *Toolkit* subscribers to have RDA documentation included in their search results.

RDA preferences

RDA Username	<input type="text" value="xxxx"/>	RDA: Enter your RDA Username and Password in order to access the RDA resources. Note: If you do not have an RDA login, click HERE to sign up for RDA.
RDA Password	<input type="password"/>	
		<input type="button" value="Apply"/> <input type="button" value="Cancel"/> <input type="button" value="Restore to default"/>

Index

Initial Login	p. 2
CD3 (Preferences set-up)	p. 2
CD4 (Preferences set-up)	p. 3-4
Navigation	p. 5
CD3 vs CD4 Functions	p. 5-8
Favorites	p. 8-9
Searching	p. 10
Facets	p. 10
Contents	p. 11
Advanced search	p. 11
Miscellaneous	p. 11