

Cataloger's Desktop 3.0: Tools and Functionality

Welcome to Cataloger's Desktop

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The Library of Congress

Cataloging Distribution Service
Washington D.C.

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Course Manual

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Library of Congress

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Cataloger's Desktop 3.0: Tools and Functionality

Course Summary

Cataloger's Desktop 3.0 contains the most up-to-date electronic versions of the tools bibliographic staff around the world use to process materials in a variety of formats. This 2-hour course will enable library bibliographic control staff to identify the tools they need and explore the major features of Cataloger's Desktop 3.0

Learning Objectives

At the end of this course, participants will be able to:

- Identify the Cataloger's Desktop tools they need for their work
- Set up their general and personal preferences
- Search for terms in a variety of Desktop resources
- Navigate search results in the toolbar and rail
- Use drill downs to refine searches
- Save searches and retrieve "saved searches"
- Create and retrieve personal and shared bookmarks
- Save and retrieve search histories

Other training available:

<http://www.loc.gov/cds/desktop/web-faqs.html>

UNIT 1: Introduction and Setting Up Your Account

Topic 1 Overview of Cataloger's Desktop 3.0

Library staff from around the world use the Cataloger's Desktop 3.0 (CD3) system to access over 280 cataloging tools that cover almost every aspect of bringing resources under bibliographic control. Included are electronic manuals, policies and procedures as well as metadata standards. CD3 is distributed through the Cataloging Distribution Service of the Library of Congress and is updated quarterly by the Policy and Standards Division in the Acquisitions and Bibliographic Access Directorate.

Paper copies of major cataloging tools are frequently out-dated, accessible only in certain areas or being phased out. Staff finds the finger-tip, on-demand access to the resources they need in CD3 a much more initiative experience than in CD2. They are amazed at the time-saving mechanisms and personalized list of resources they can set for just the tools they need.

Topic 2 What is New?

- One of the major new features of **Cataloger's Desktop 3** is the ability of users to access their chosen cataloging resources immediately after logging in.
- The Rail provides new tools including quick task menus to do specific things such as find a MARC organization code or a bibliographic record. There are filters to refine your search so you can limit to a particular resource or specific type of material.
- The Search function provides "did you mean" spelling correction, variant spellings as well as synonyms and then returns meaningful results. There is also context wording around your hits so you can determine which ones you want.
- There are quick filters that allow you to switch quickly between your resources and resources that are relevant to cataloging a specific type of material. Perhaps you usually cataloging monographs but now just need to do a few serials. You can switch to resources for cataloging serials.
- Acronyms precede resources so that they will file together in logical groupings.
- Your entire search history for a session now can be saved as well as your individual searches.

Topic 3 Initial Login

One of the major new features of **Cataloger's Desktop 3** is the ability of users to access their chosen cataloging resources immediately after logging in. In order to create your personalized list, at initial login, you will be prompted to enter your **Email address/User name** as a “**user name**” and a temporary password.

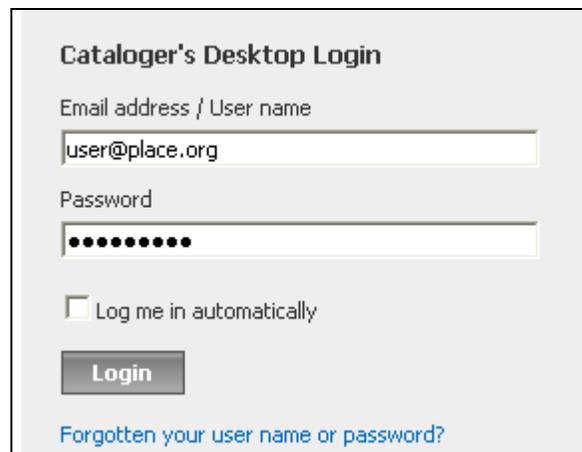
There are three options you may see in this initial login process. **You should follow the instructions for the option that matches your situation.**

Initial Login - Option 1

You have used your email address to set your preferences in the old version of Cataloger's Desktop. You will receive an initial login password sent via an email message to the email address you used to set your preferences in CD2.

Steps:

1. Enter URL:
<http://desktop.loc.gov>
2. Enter your email address, as your user name, and the temporary password supplied in your email message.
3. Click **Login**.
4. You will see a screen where you can set up and confirm a password of your choice. Set and confirm your password
5. Click Login



Cataloger's Desktop Login

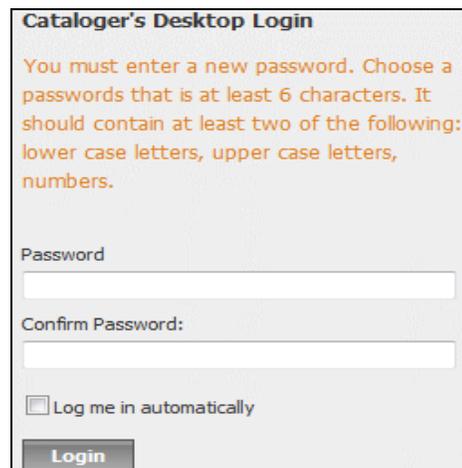
Email address / User name
user@place.org

Password
●●●●●●

Log me in automatically

Login

[Forgotten your user name or password?](#)



Cataloger's Desktop Login

You must enter a new password. Choose a password that is at least 6 characters. It should contain at least two of the following: lower case letters, upper case letters, numbers.

Password

Confirm Password:

Log me in automatically

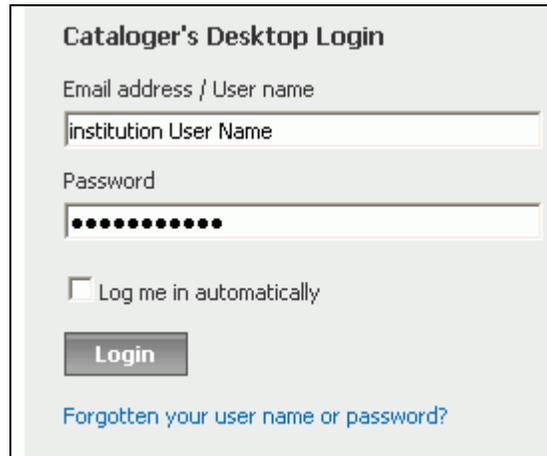
Login

Initial Login - Option 2

Your institution has a user name and password that everyone uses to log into Cataloger's Desktop.

Steps

1. Enter URL:
http://desktop.loc.gov
2. Enter your institution's user name and password.
3. You will go to another login screen to enter your email and a password you choose.
4. Click **Login**.



Cataloger's Desktop Login

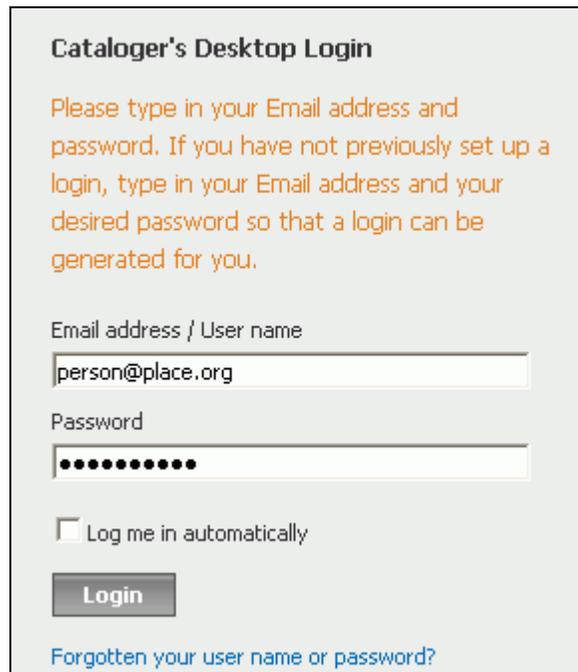
Email address / User name
institution User Name

Password
●●●●●●●●

Log me in automatically

Login

[Forgotten your user name or password?](#)



Cataloger's Desktop Login

Please type in your Email address and password. If you have not previously set up a login, type in your Email address and your desired password so that a login can be generated for you.

Email address / User name
person@place.org

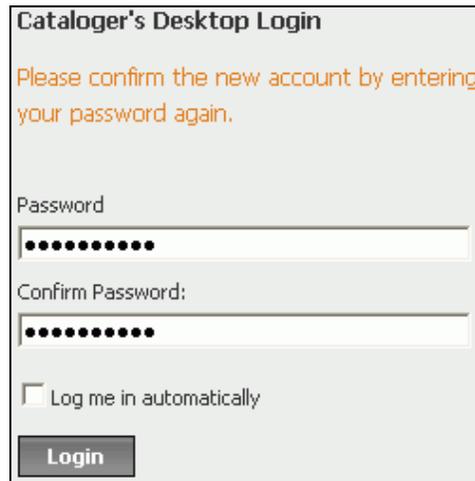
Password
●●●●●●●●

Log me in automatically

Login

[Forgotten your user name or password?](#)

5. You will see another screen where you should re-enter and confirm your password.
6. Click **Login**.



Cataloger's Desktop Login

Please confirm the new account by entering your password again.

Password
[password field]

Confirm Password:
[password field]

Log me in automatically

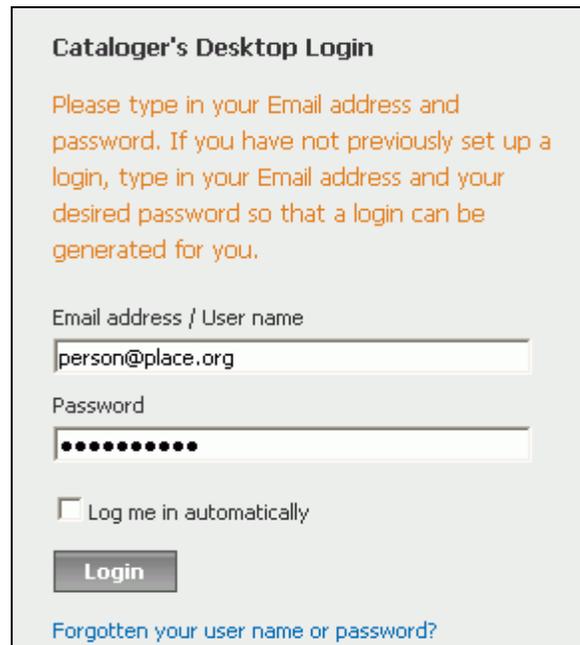
Login

Initial Login - Option 3

Your institution had used an IP address in CD2 to log you in automatically.

Steps

1. Enter URL:
http://desktop.loc.gov.
2. You will go to this login screen to enter your email address and a password you choose.
3. Click **Login**.



Cataloger's Desktop Login

Please type in your Email address and password. If you have not previously set up a login, type in your Email address and your desired password so that a login can be generated for you.

Email address / User name
[person@place.org]

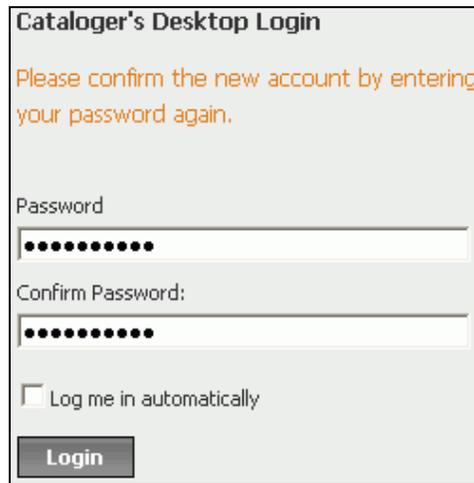
Password
[password field]

Log me in automatically

Login

[Forgotten your user name or password?](#)

4. You will see another screen where you should re-enter and confirm your password.
5. Click **Login**.

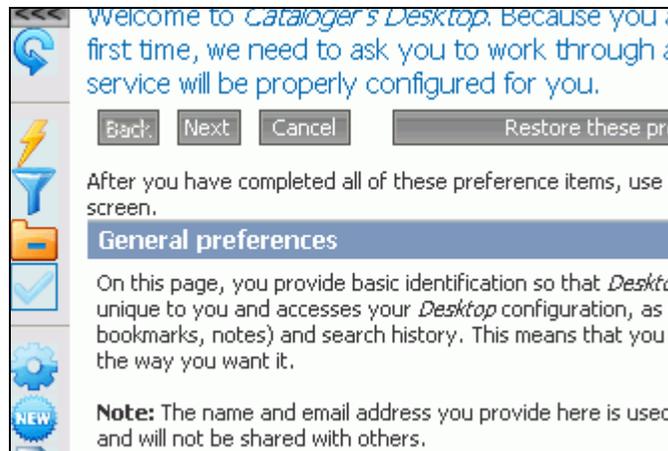


Topic 4 Setting General Preferences for All Users

You will open a window where you will begin the process of setting up your General Preferences. The purpose of these preferences is to configure your desktop to best meet your needs. Your personal desktop configuration will then display each time you login. These preferences may be changed later on if you change your mind about what you have selected here. We will discuss changing these preferences in Unit 2.

Steps:

1. Review the **General preferences** page.



2. Select your language choice, your name, number of hits you want to display at one time, and whether you want to see tips when you roll your mouse over various items.

3. If you plan to use **Resource Description and Access (RDA)** from within Desktop, you must also have an **RDA** account. You must enter your RDA login and password. If your library has IP recognition access to RDA you will need to supply the following RDA Username: **ip**
RDA Password: *[blank]* (i.e., leave this box blank)

4. You can restore these preferences to the default or select other options in the future, if desired.

5. Click **Next**.

6. You will display a screen where you should spend a few minutes and make decisions about how you will use CD3.

The screenshot shows a web form for configuring the user interface. It includes sections for:

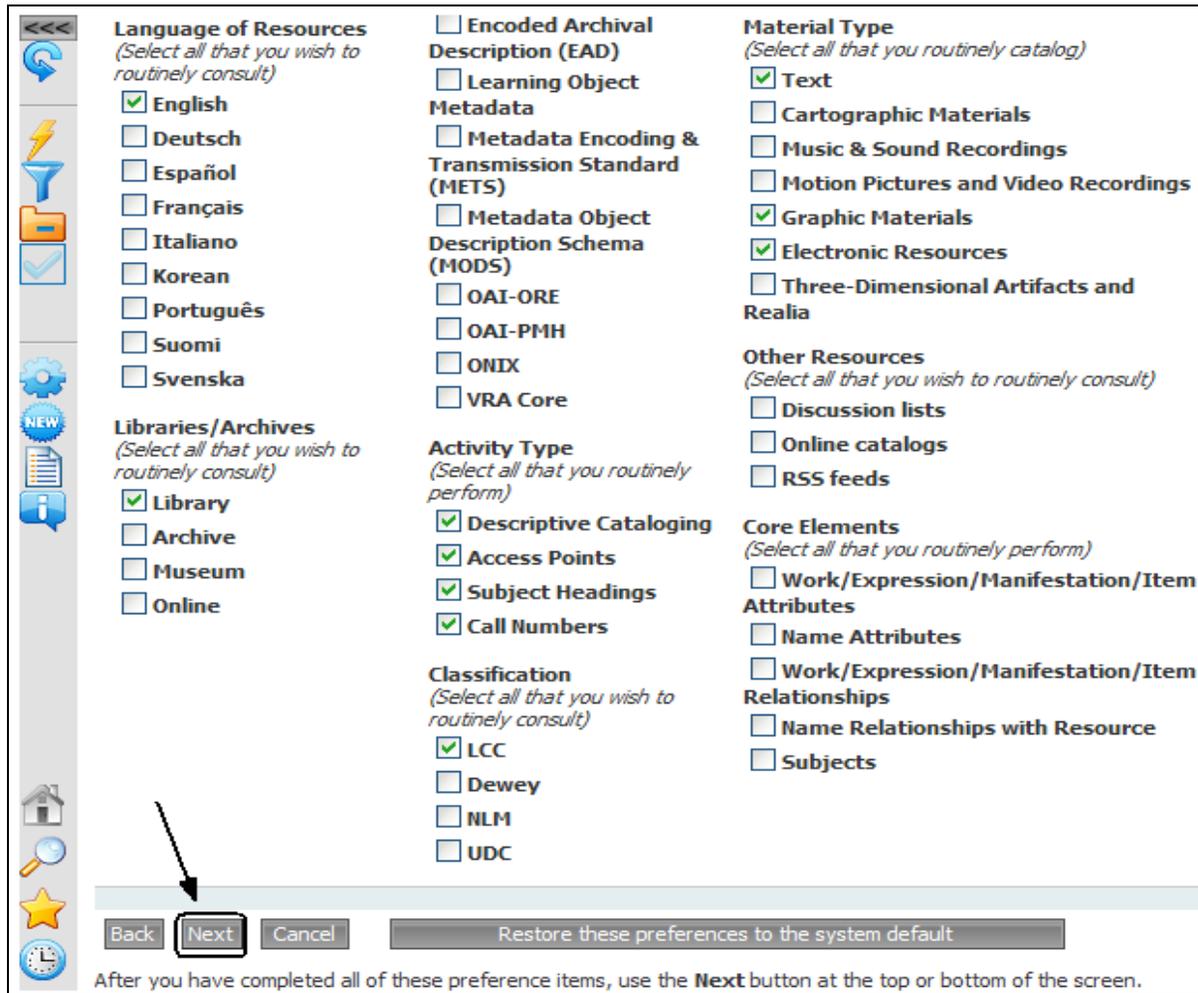
- Interface language:** A dropdown menu set to 'English'.
- Your name:** Input fields for 'First name' and 'Last name'.
- Your display:** Radio buttons for 'Compressed layout' (selected) and 'Full layout'.
- Search results:** A dropdown menu for 'Number of hits' set to '30'.
- Search tips:** Radio buttons for 'Show tips automatically' (selected) and 'Don't show tips automatically'.
- Session timer:** Input fields for 'Inactivity timeout in minutes' (set to '60') and 'Warn' (set to '5') 'minutes before timeout'.
- RDA:** Input fields for 'RDA Username' and 'RDA Password', with a note to click a link if no login exists.
- Open RDA options:** Radio buttons for 'Open RDA within Cataloger's Desktop' and 'Open RDA outside of Cataloger's Desktop' (selected).
- Buttons:** 'Next', 'Cancel', and 'Restore these preferences to the system default'.

Select either "Open RDA within Cataloger's Desktop" or "Open RDA outside of Cataloger's Desktop". **NOTE:** Some web browsers will prevent opening RDA from within Cataloger's Desktop. In that case, please select the "Open RDA outside of Cataloger's Desktop" radio button.

The screenshot shows a confirmation screen titled 'Your Desktop Configuration'. It contains:

- A blue header bar with the title 'Your Desktop Configuration'.
- Text explaining that the user is logging in for the first time and that preferences will be configured.
- Buttons for 'Back', 'Next', 'Cancel', and 'Restore these preferences to the system default'.
- Instructions to use the 'Next' button after completing preferences.
- A paragraph stating: 'This page allows you to make basic choices about the types of resources you consult. Please take a few moments to complete this page. This will help Cataloger's Desktop searches on the resources that best meet your needs.'

7. Check the selections on the form and CD3 will present a list of resources based on your choices.

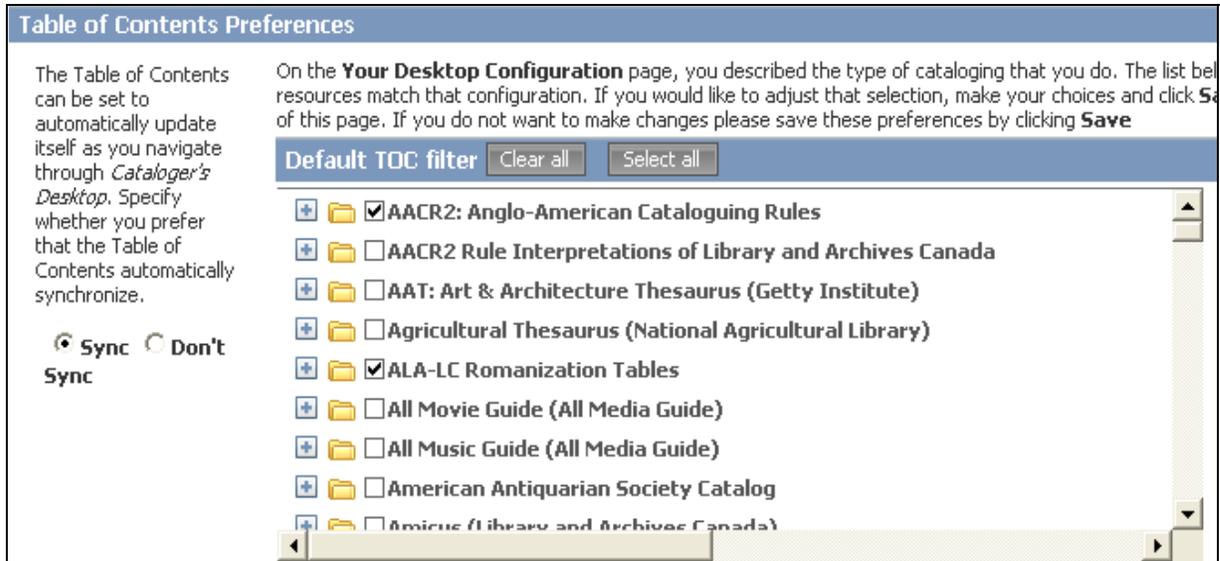


8. Click the **Next** button and you will see a warning notice that your choices will change the table of contents you will see on your opening screen. Since you haven't set preferences before in CD3, click **OK** so you will have an opportunity to set up your specific preferences.

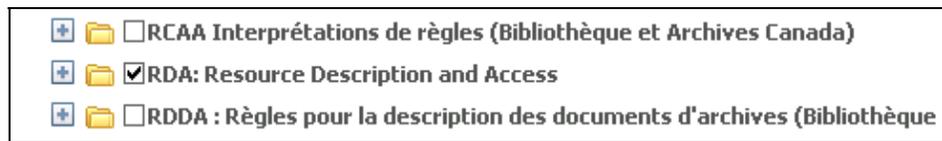


9. You will see a screen with selected CD3 resources with some items checked based on your general preferences. You now have an opportunity to check or unchecked the resources

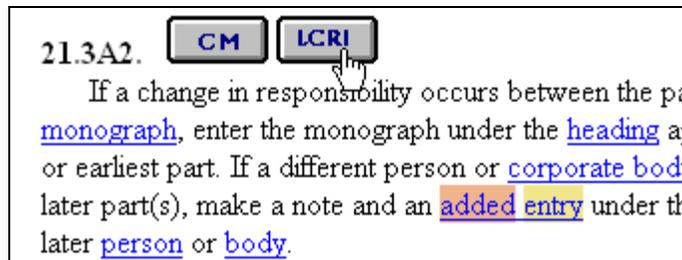
you want to use. You also can go back to change your choices on the previous page or restore everything to the system default.



NOTE: You should select **RDA** if you plan to access it in Desktop.



- You can also specify if you would like to have the Table of Contents synchronize automatically which is handy after you have done a search and selected a resource in a different area from the one you originally displayed such as **LCRI**.



- Click on the **Finish** button when you have completed your selections. You are now ready to use CD3!

UNIT 2: Managing Your Preferences

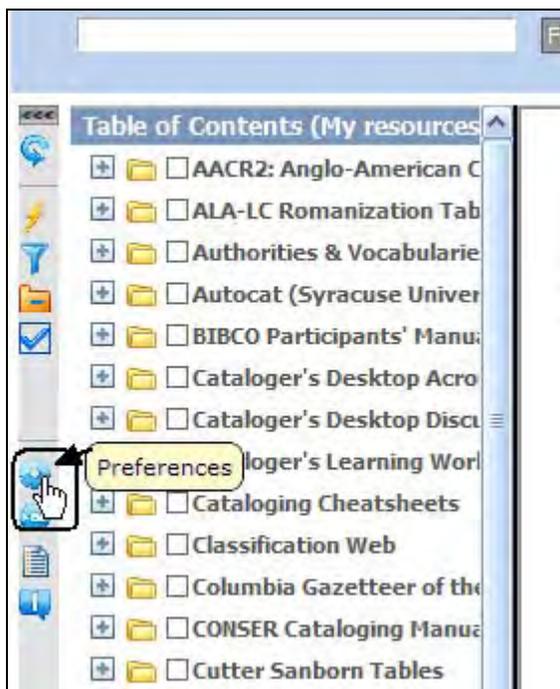
Topic 1 Changing your General Preferences

As you use CD3, you may need to change your preferences. You may have new workflow and need to change your **general preferences** and/or need additional resources to process materials and need to change the **Table of Contents** listing of “**My Resources.**”

You may change your general preferences to include language, number of results per screen, layout compression and whether you would like to see tips automatically.

Steps:

1. After you have logged in and displayed your resources and/or searched, click on the Preferences **COG** icon in the **Rail**.



2. The **Rail** will change and you will see a **yellow COG** icon that is displaying the General preferences page. Many users will want to change to the **Compressed Layout** here so that all the CD3 resources and functions will display on the screen. You may also change the number of hits displayed at a time in the results panel as well as turn on or off the display of automatic tips.

General preferences

On this page, you provide basic identification so that *Desktop* will know who you are. Your login is unique to you and access configuration, as well as all of your customizations (i.e., bookmarks, notes) and search history. This means that you have set up the service the way you want it.

Note: The name and email address you provide here are used solely for accessing *Cataloger's Desktop* and will not be shared with any other service.

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

Language: English

Your name: Please specify your first and last names.

First name: Joan

Last name: Weeks

Your display: For screen display resolutions below 1024 x 768 (such as 800 x 640) please select Compressed layout.

Compressed layout Full layout

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

Number of hits: 30

Search tips: Please indicate whether you would like to automatically see tips.

Show tips automatically Don't show tips automatically

Session timer: Please specify how long your *Cataloger's Desktop* session should last:

Inactivity timeout in minutes: 60

Warn: 5 minutes before timeout

Save Cancel Restore these preferences to the system default

- For the **Session timer** your account has been set with a 60 minute timeout default, and a timeout warning of 5 minutes. You can change the timeout to any number of minutes between 5 and 60, and any timeout warning that is at least 1 minute less than the timeout number.
- Make your changes and select **Save** at the top or bottom of the screen.



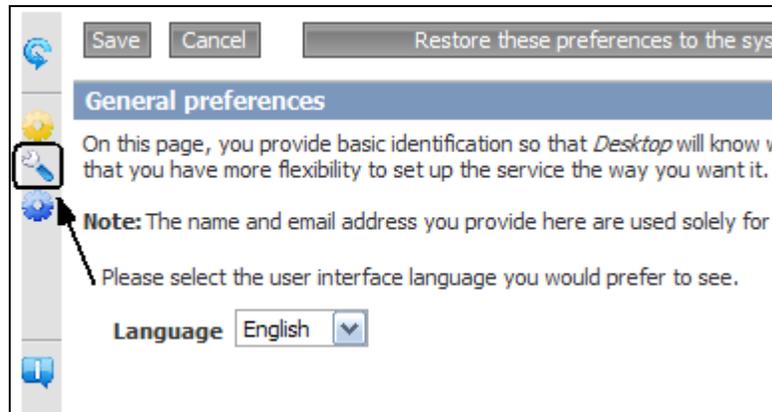
Topic 2 Changing Your Desktop Configuration

You may change your **Desktop Configuration** either just after you changed your **General preferences** or without changing your General preferences.

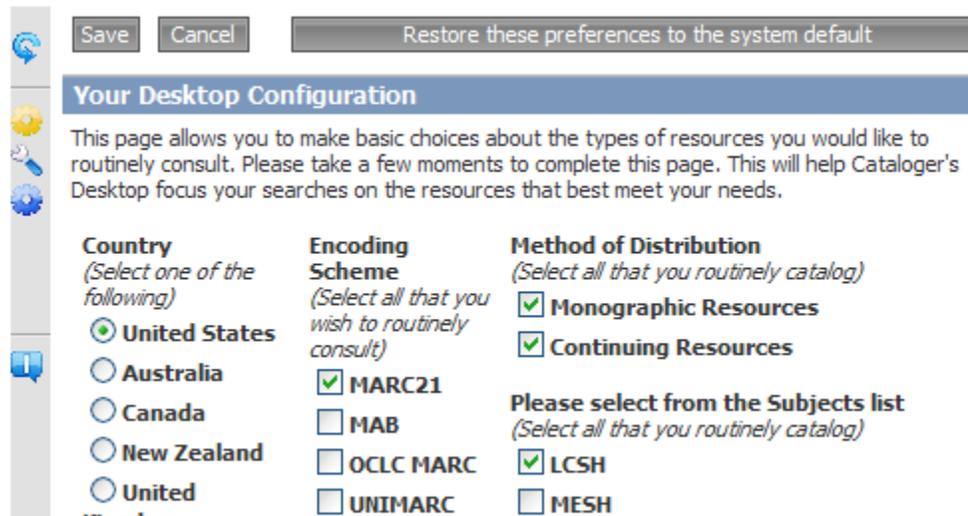
Steps

1. Select the **WRENCH** icon.

Note: If you have just saved your **General preferences** the screen will refresh to the “**My Resources**” page and you will need to click on the **Preferences** cog icon again to see the **WRENCH** icon.



2. You may now change the preferences for categories of resources that you routinely consult.



3. Click **Save**.

This action will change all of your selected preferred resources back to a general list based on your desktop configuration.



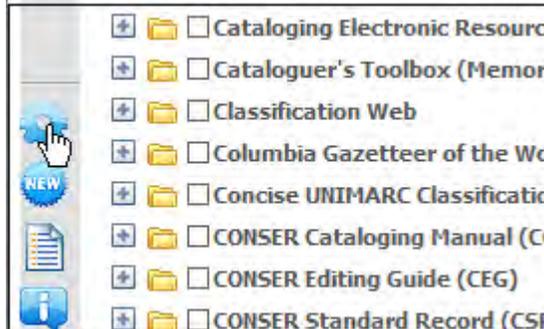
4. Click **OK**. You will now display the screen to change your preferred list of resources. Make your selections.

Topic 3 Change Your “Table of Contents My Resources” Preference

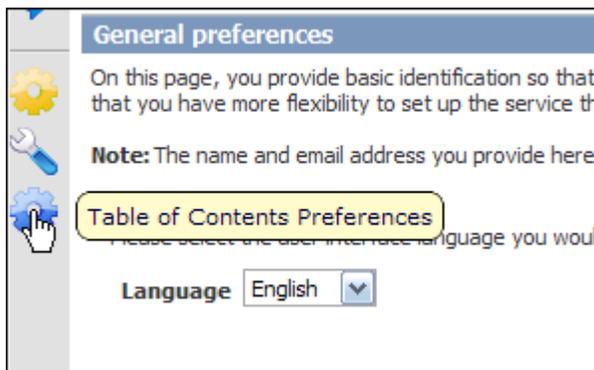
You do not have to change your **General preferences** and **Desktop configuration**, if all you want to edit is your **Table of Contents My Resources** selections. For example, you may want to add and/or delete some resources.

Steps:

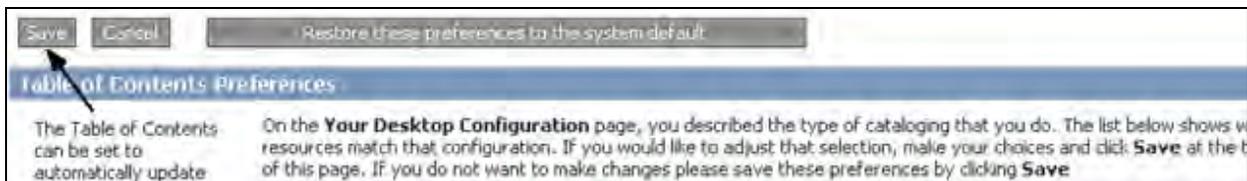
1. After initial login, click on the **COG** icon.



2. Select the **COG** icon under the **WRENCH** icon. This action will take you directly to the **Table of Contents Preferences** page to edit your resources.



3. Check the selections you want to change and select **Save**.



Your screen will refresh with your new **Table of Contents My Resources** pane.



UNIT 3: Getting the Most Out of Search

Topic 1 Navigating the Rail in Searching

After you have logged in you should see your chosen resources display in the Table of Contents. You should also see a Rail Pane at the far left side.

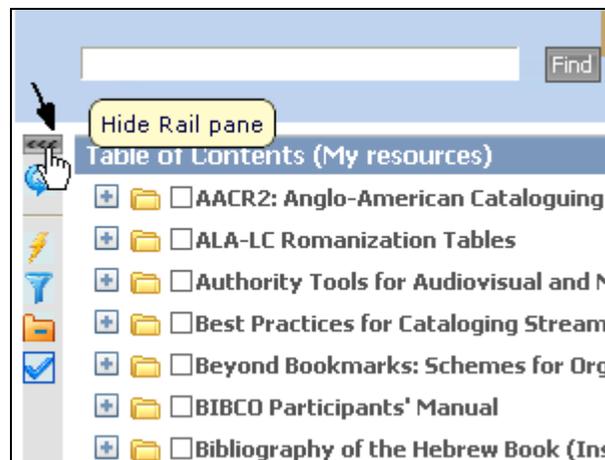


The Rail Pane is a new feature with this version of CD3 and has many features to help you use the Cataloger's Desktop resources quickly and efficiently. We will go through them in sequential order.

Steps

1. You may use the <<< at the top to **hide the pane on the left** next to the **Rail** to see the full screen view of your document as in the next image.

If you roll your mouse over the icons you will see a tool tip.

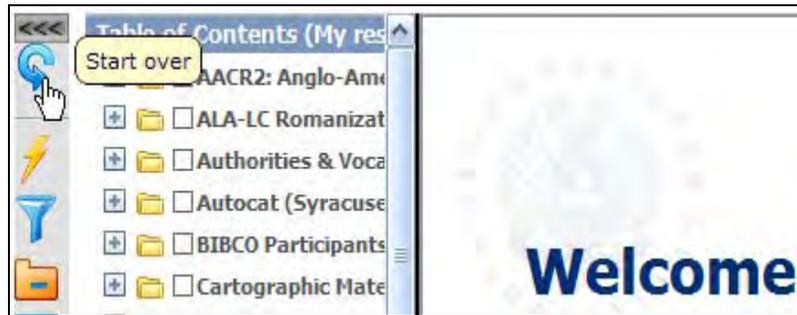


2. You may click the >>> after you have seen your document and display the left pane next to the **Rail** again as is shown in the image below.



3. The next icon in the rail is the **START OVER** button. This icon will clear everything from both the left and right panes.

Note: It will also erase your search history unless you have saved it per the instructions on page



4. The **LIGHTENING BOLT** icon opens a fly out menu of **Quick tasks** to give you the ability to jump to the specific resource that best meets your needs. Some of the links in the area are still under development and your input and suggestions are most welcome.



Exercises:

1. Press the link for **Find a bib record**. Notice how it defaults to the LC online catalog.
2. Under Find a MARC 21 tag, select Bibliographic link and search for the 260 field.
3. Many of the links are under development. Which links would you use? _____
4. How could you use this feature in your work? _____

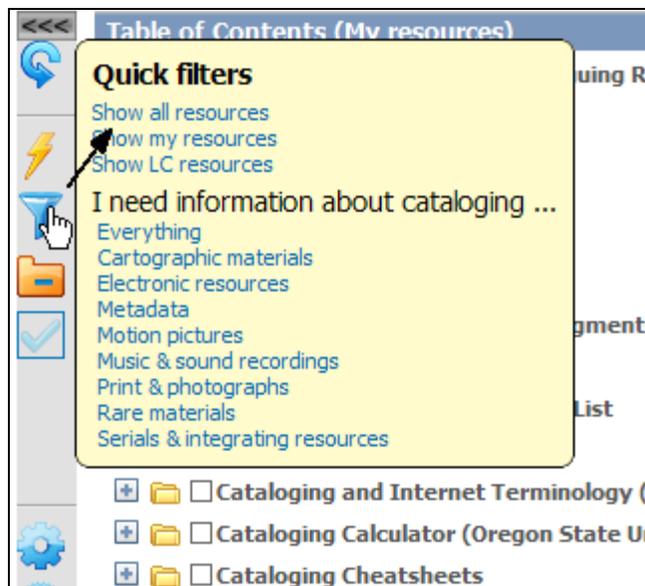
Navigating the Rail in Searching continued

Steps

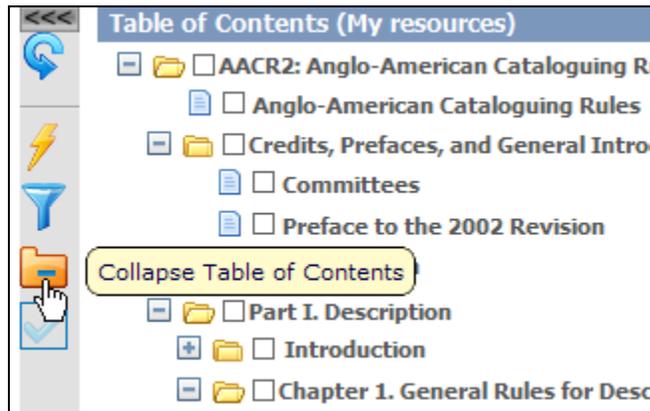
5. The **FUNNEL** icon provides **Quick filters** to toggle between your resources, all resources and just LC resources.
6. When you click on **Show all resources**, you may display the full list of CD3 resources and select perhaps one that isn't on your resource list for a specific search.

Note: You should left click on the funnel and drag your mouse over on to the fly out menu, and then click on the link you desire.

7. If you have an active search, for example in your resources, you can refine your search results to **LC resources** by clicking the link.

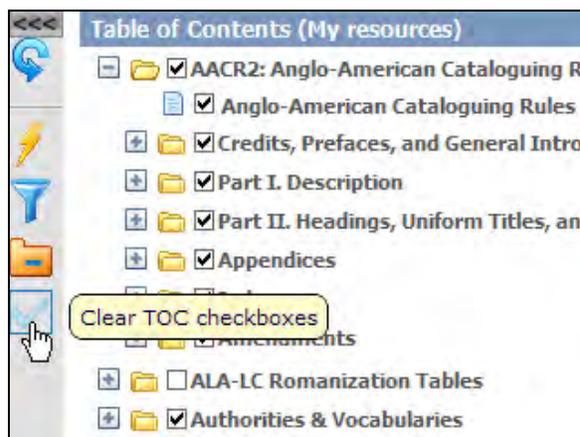


8. You may collapse the **Table of Contents (TOC)** using the **FOLDER** icon. This is very useful, if you have drilled down in a resource for a particular item.

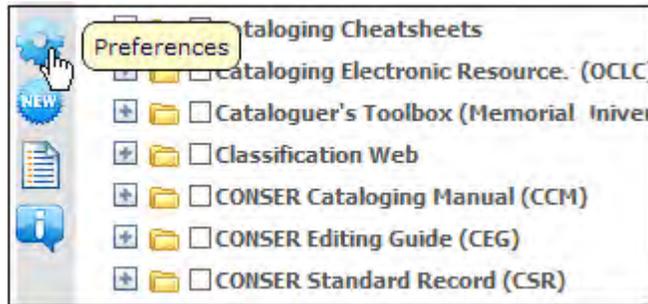


9. The **CHECK MARK** icon clears all of the check marks you have entered before the resource to be searched.

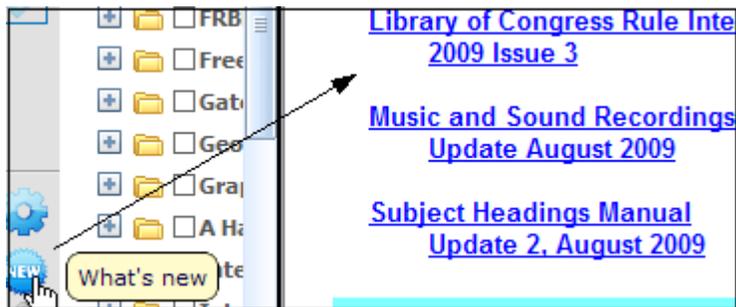
Note: You can focus your search to the specific resources you need by putting checks before the resources to bring highly relevant search results.



10. The **COG** icon gives you the opportunity to re-set your initial **login preferences** that you set when you logged into CD3 for the first time. You may do this if you need to change your settings at any time. Please see Unit 2 for further instructions.



11. The **NEW** icon gives users a quick look at the latest additions and changes to Desktop.



12. The **SHEET OF PAPER** icon provides a quick reference to the acronyms that catalogers use to refer to CD resources. Acronyms are listed at the beginning of many resources in the TOC to help grouping and finding similar items.



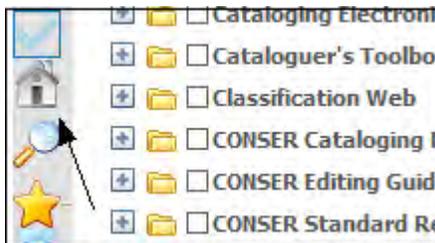
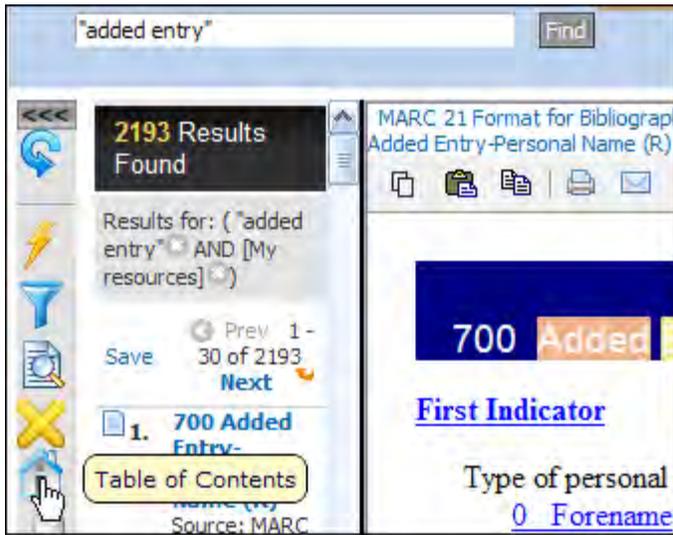
13. The **HELP** icon opens a new window to the Cataloger's Desktop Training resources and a FAQ.



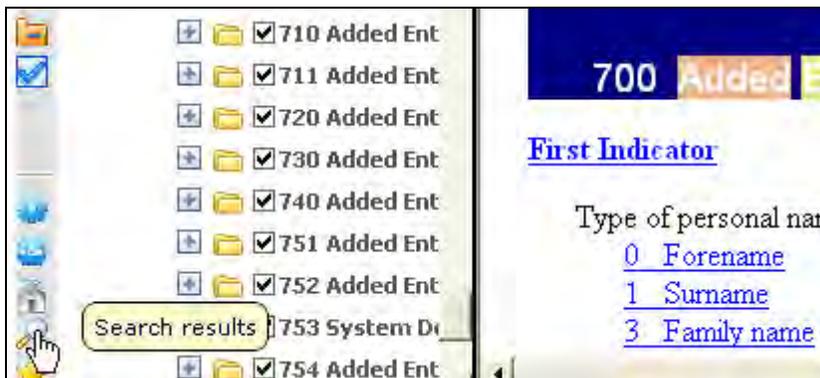
Put **“added entry”** in the search box and click **Find**.

- After you have done a search you may use the **HOUSE** icon to return to the resources in the TOC.

Note: Notice how the **HOUSE** icon has turned gray. This indicates that it is the selected icon. Your search terms are retained and you could quickly select another resource and search it rather than clearing your search.

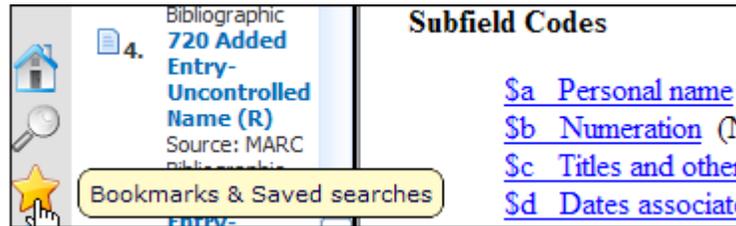


- The **MAGNIFYING GLASS** icon gives users a very quick way to return to the **Search results** list after you have displayed a document in the right pane.



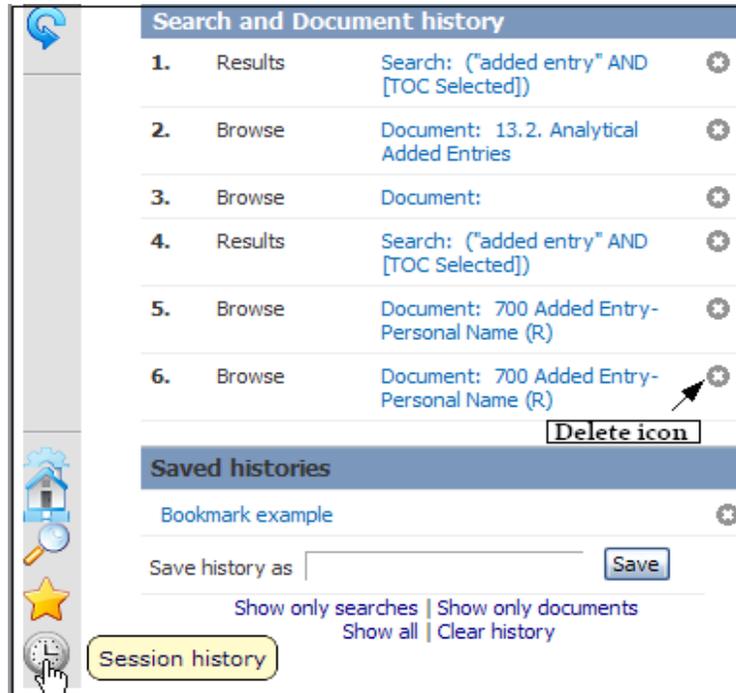
16. The **STAR** icon enables users to jump quickly to their **Bookmarks and Saved searches**.

Note: Bookmarks and notes will not carry over from CD2. These will need to be recreated in CD3. We will create Bookmarks and notes in Unit 4.



17. The **CLOCK** icon is very useful for quickly going to your session history. You can save your history with options to just save searches, only documents or all items.

Note: You can use the X to delete some of the results and then just save the session history you want.



18. You may click on the **Save histories** link to retrieve the session history you saved. We will explore this more in Unit 4.

19. You may edit this session and then **Save** it again.



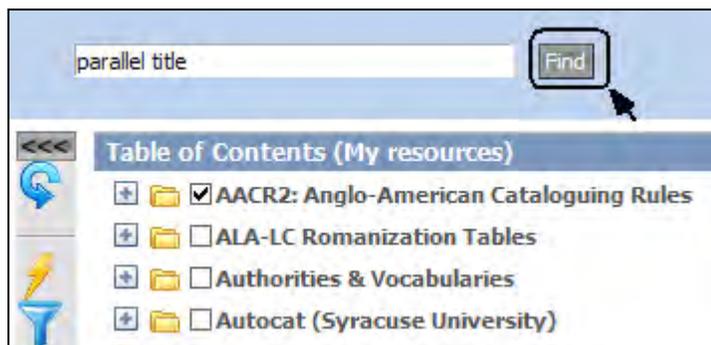
Topic 2 Basic Searching

You may do simple keyword searches, browse searching, use limits and filters, as well as save searches in Cataloger's Desktop 3. Every time you logon after the initial set-up your opening screen will display your selected resources. You may do basic as well as advanced searching from one search box.

Steps

6. Enter keyword search terms.
We have entered **parallel title** in the search box.

Note: This is an automatic **AND** search where both terms will be retrieved. Boolean searching using **AND, OR, NOT** is available. These are available in **English, French, German and Spanish**.



7. Select the resource you want to search. We have selected **AACR2** by putting a check mark before **AACR2** in the Table of Contents (TOC). **You may select several sources at a time.**
8. Click on **Find**.

Topic 3 Searching Tips

When you have the automatic search tips turned on in your preferences, a screen will display tips when you start to type your search terms.

The Search Box returns results for ALL keywords you are Searching.
Type "quotation marks" around a keyword string to search it as a phrase.
Boolean AND, OR, and NOT are available.
Additional search help is available [here](#).
You can turn off these messages [here](#) by selecting Don't show tips automatically

Click the **here** link to display more search tips.

The table below will appear and shows examples of the ways the Boolean operators **and, or, not**, as well as phrases and wildcards may be entered.

Operator	Example	Result
And	one two one & two one and two	Finds documents with both 'one' and 'two'.
Or	me you me or you	Finds documents with either 'me' or 'you'.
Not	^him not him	Finds documents that don't contain 'him'.
Phrase	"to be or not"	Finds documents with the exact phrase 'to be or not'.
Single character wildcard	wom?n th??	Finds documents with 'woman', 'women', etc., or 'this', 'that', 'them', etc.
Multiple character wildcard	a*n work*	Finds documents with 'an', 'addition', 'assign', etc., or 'work', 'works', 'working', etc.

Exercise:

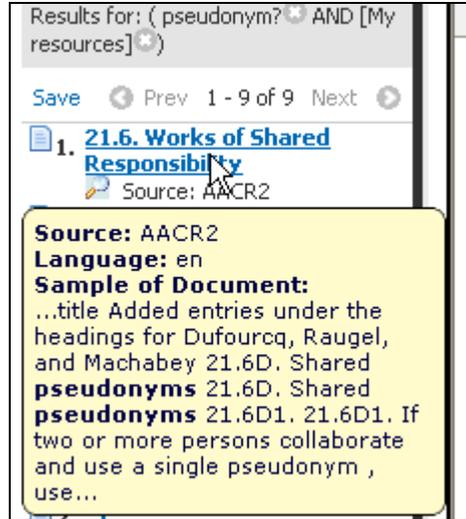
1. Select AACR2
2. Enter "**additions to names**" wom?n (for woman and women) in the Search box.
3. Review your results to see that the phrase was retrieved as well as both forms of woman/women.

The screenshot displays a search interface with two panes. The left pane shows search results for the query: ("additions to names" AND wom?n AND [My resources]). Two results are listed: 1. 22.15. Additions to Names Entered Under Surname (Source: AACR2) and 2. -T- (Source: AACR2). The right pane shows the text of rule 22.15B, "Terms of address of married women", with the word "women" highlighted in yellow. An arrow points from the highlighted "women" in the left pane to the highlighted "women" in the right pane. A button labeled "LCRI" is located to the right of the highlighted text.

Topic 4 Reviewing Search Results

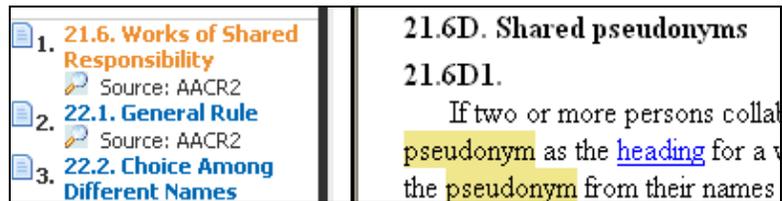
Steps

1. Enter keyword search term: **pseudonym?** in the search box.



2. You may roll your mouse over the **hits** in the left pane to view a short summary that will help you decide whether to view the full content.

3. When you click on the hit, the full document will display in the right pane.



Exercise:

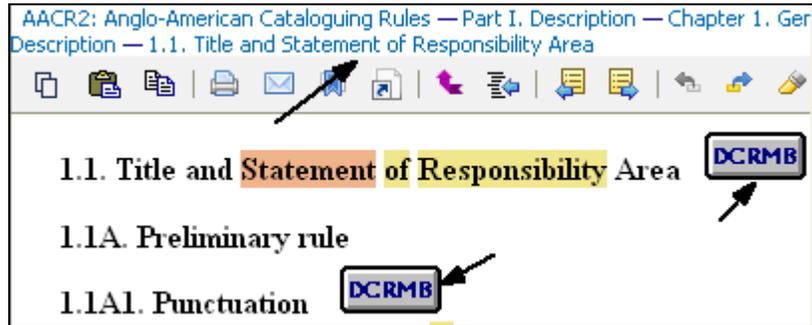
1. Search for "**chief source of information**" in AACR2
2. Roll your mouse over the hits to view the summary.
3. Select a hit and display it in the right pane.
4. Select another hit and see how the right pane refreshes.

Topic 5 Navigating in Your Document

Search for “Statement of Responsibility” in AACR2

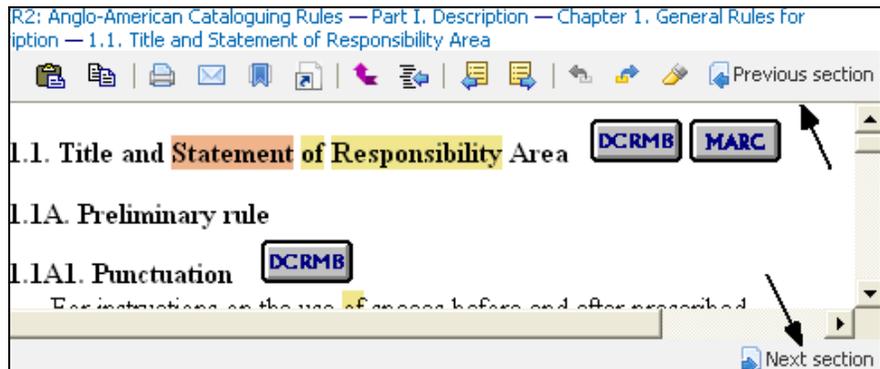
Steps:

1. You can determine where you are in the resource by viewing the **bread crumb links** at the top of the document. You may click these links to jump to a particular section.

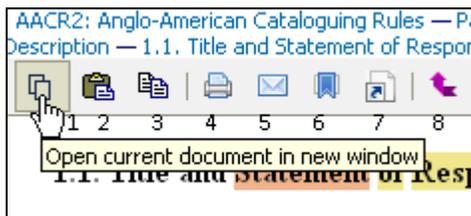


Additionally, as before in Cataloger's Desktop 2, you may click on the buttons to jump to another source to see the equivalent or similar discussion.

2. You can navigate to the **next or previous sections** by using the icons at the top and bottom of the displayed document.



3. You may roll your mouse over the icons in the toolbar to see an explanation of their function.

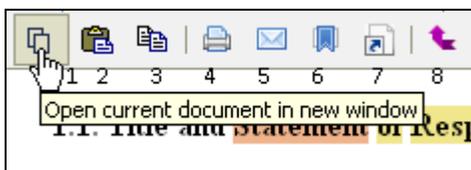


The following numbers correspond to the number under the icon in the picture:

1. Open the current document in a new browser window.
2. View the clipboard.
3. Copy to the clipboard.
4. Print the document.
5. Email the document.
6. Bookmark the document (see Unit 5 on Bookmarks)
7. Create URLs and Shortcuts
8. Go back to return to through the screens you have viewed.

Exercises:

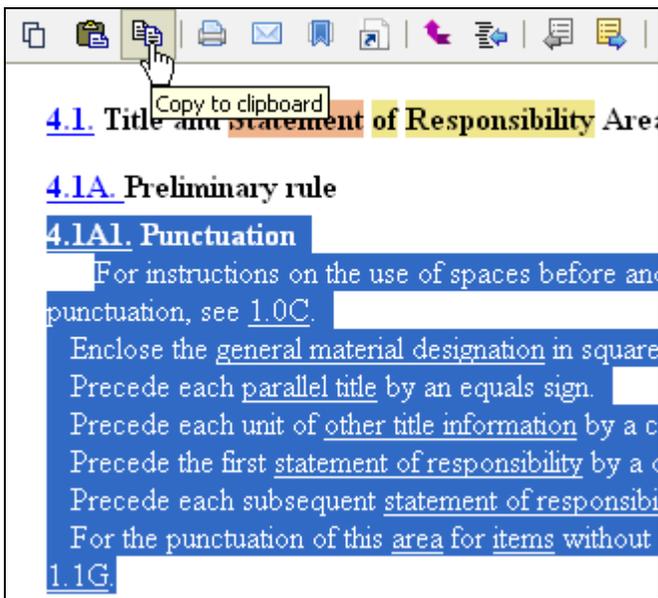
1. Display a document in your right pane.
2. Click on the **Open current document in a new window** icon.



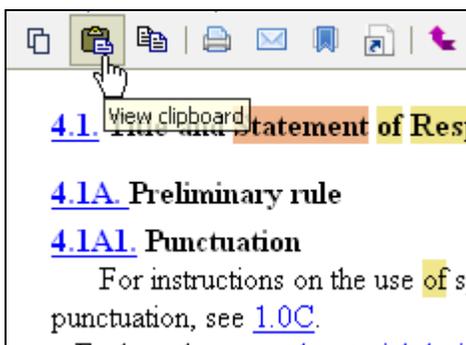
3. View your document. You may close the window by using the **X** to return to Desktop.



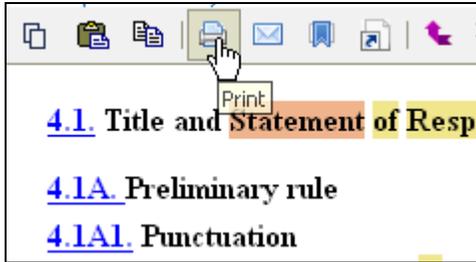
4. Select a section of text for the clipboard.
5. Click on the **Copy to clipboard** icon. This will copy your text to the clipboard



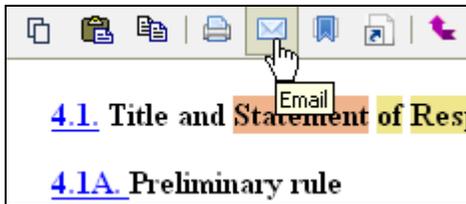
6. Click on the View clipboard icon and display your selection.



- You may print the document by pressing the Print icon.



- Click on the **envelope** icon to email the document to yourself or someone else you designate.



Email document

From: xxx@loc.gov

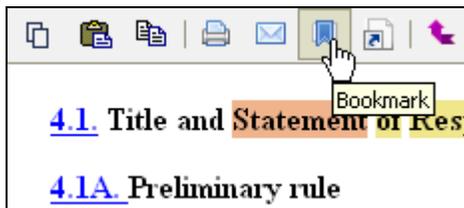
To: _____

Subject: 4.1. Title and Statement of Responsibility Area

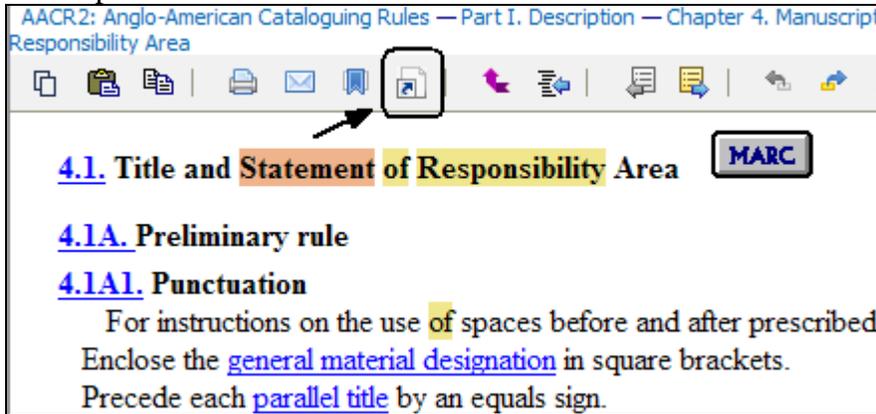
Note: A reference to the document will be added.

Note: The subject may be changed to be more meaningful to a recipient.

- Click on the **Bookmark** icon to create a bookmark for a particular document you may want to find in the future. We will go through all the procedures to create and retrieve bookmarks and notes in Unit 5.



10. The **Shortcut** icon give you the ability to create shortcuts on your computer desktop, add the Uniform Resource Location (URL) to a document or email and/or save it within Cataloger's Desktop in the Bookmarks area. Click the shortcuts icon.



The left pane will open to display a dialog where you have several options.

- You can click **[Select]** to use the URL and see the document.
- You can click in the place in document in the right pane where you want to return in the future and at the bottom you will see "Position has been set."
- You can type in the rest of the URL with a extension of your choice or accept the default
- You can click **Save** and the shortcut will be available in your **Bookmarks**.

If you click **[Select]** you will see the screen on the next page.

Create Shortcut

The following web addresses have already been created for this resource. You may use one of them or create your own below. Click the link to see the position in the document or click Select to use the web address.

 <http://desktop.loc.gov/saved/titlepropersample>
[Select]

Please type your preferred web address in the box below. Use only letters, numbers, periods, underscores, or dash characters in the address.

The following is your preferred web address:
<http://desktop.loc.gov/saved/>

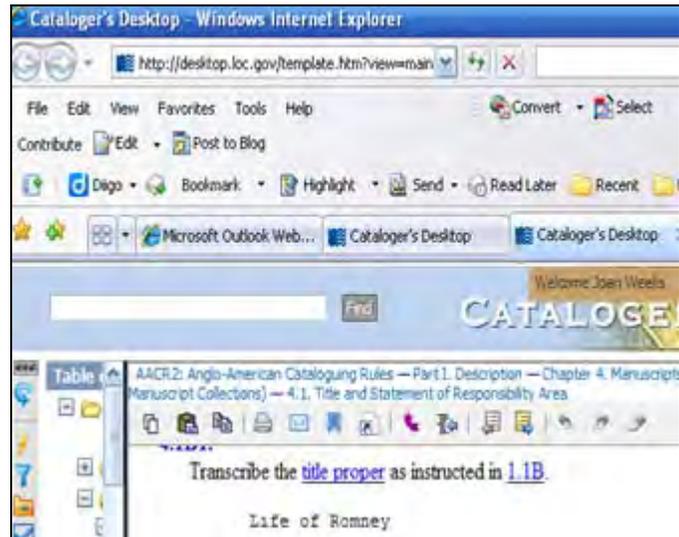
If you wish to anchor to a specific spot in this resource, mouse to that point and click.

Position has been set.

If you clicked [Select] to use the URL you will see the screen below with three options.

- You can copy this web address into a document or shortcut:**
1. <http://desktop.loc.gov/saved/titlepropersample>
- You can also create a shortcut by dragging the following link to your computer's desktop:**
2. [titlepropersample](#)
 3.  Save as a bookmark

1. You can copy and paste the URL into a browser. You must be signed into Cataloger's Desktop for this to work.



2. You can left click on the link (2) and drag it to your desktop. You will see a dialog to copy the files there. Click **Yes**.



You will see your shortcut on your desktop. When you are logged into Desktop you can click this shortcut and go to your saved document.



<p>You can copy this web address into a document or shortcut:</p> <p>1. http://desktop.loc.gov/saved/titlepropersample</p> <p>You can also create a shortcut by dragging the following link to your computer's desktop:</p> <p>2. titlepropersample</p> <p>3.  Save as a bookmark</p>	<p>3. You can Save this Shortcut in with your bookmarks.</p> 
	<p>Click the Bookmarks icon in the Rail to retrieve it.</p> <div data-bbox="776 737 1289 936" style="border: 1px solid black; padding: 5px;"> <p> Shortcuts</p> <p>You may delete a shortcut that you created from your Shortcuts list, but the shortcut will remain available for other subscribers.</p> <p> titlepropersample</p> </div> <p>You may delete it by clicking on the X.</p>

11. The **purple arrow** is a go back icon used similarly to the back arrow in a browser like Internet Explorer or Firefox.



This can be handy if you select an in-text button like MARC above and then want to go back to your previous documents.

Let's move over to the next section of icons in the navigation bar.

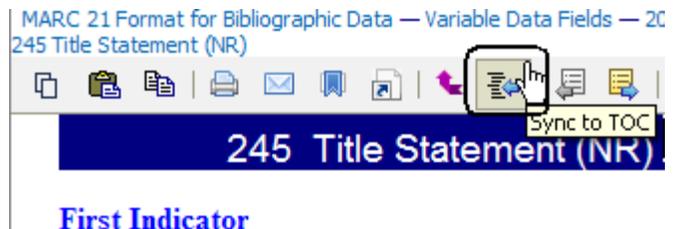
The following numbers correspond to the number under the icon in the picture:

1. You can synchronize the document you are viewing with the Table of Contents (TOC).
2. You can view the previous result from your search.
3. You can view the next result from your search.
4. You can jump to the previous hit within the displayed document
5. You can jump to the next hit within the displayed document.
6. You can click the highlighter to have the hits highlighted or turn off highlighting.

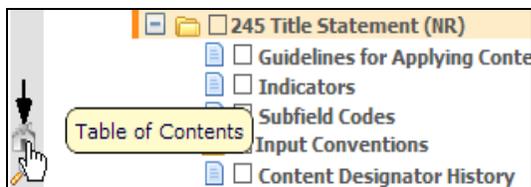


Exercises:

1. Select the **MARC** button and then select the resynchronize TOC button.



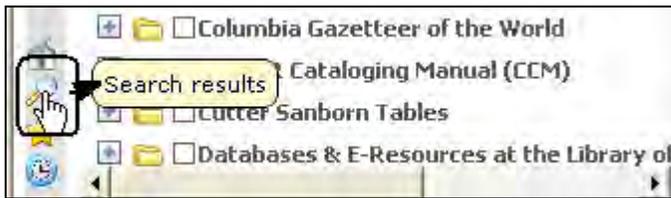
2. Click the **House** icon to display the **TOC** and your left pane will refresh with the **MARC Table of Contents** displayed.



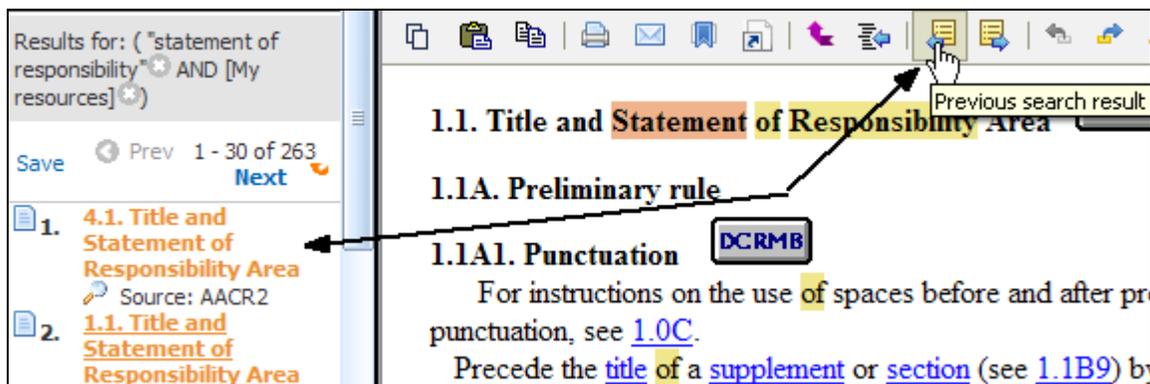
- Use the purple arrow to return to the AACR2 “statement of responsibility area.”



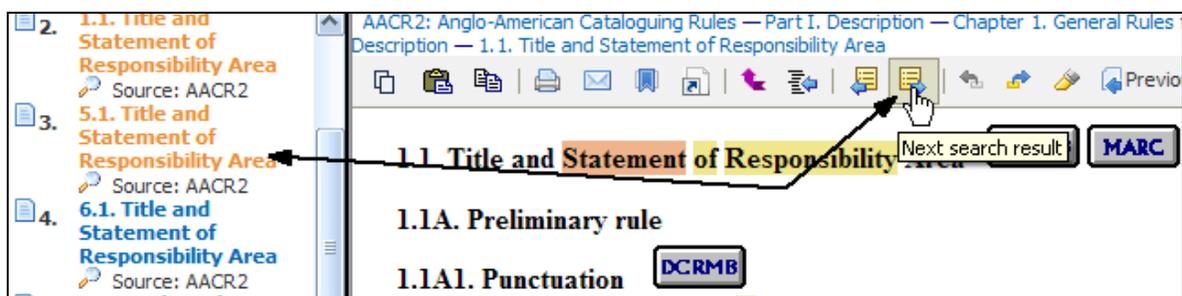
- Select the magnifying glass in the rail to return to your **Search results** list.



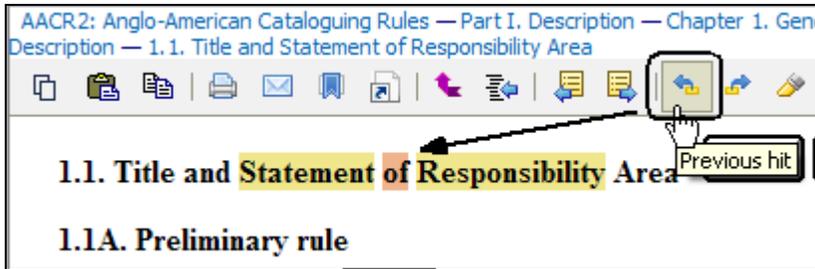
- Click the sheet of paper with the left arrow to move to the **Previous search result** which will take you back to the previous search result in the left pane.



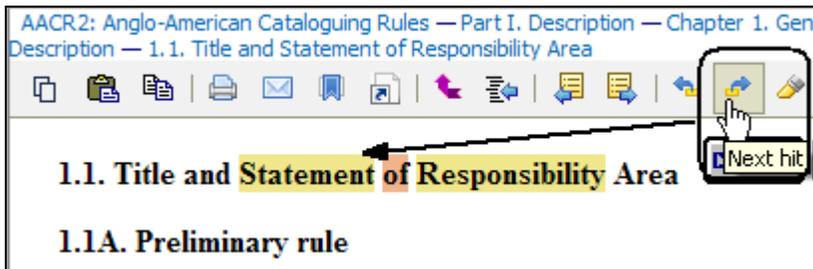
- Click on the paper with the right arrow to move to the **Next search result** which will take you to the next search result in the left pane.



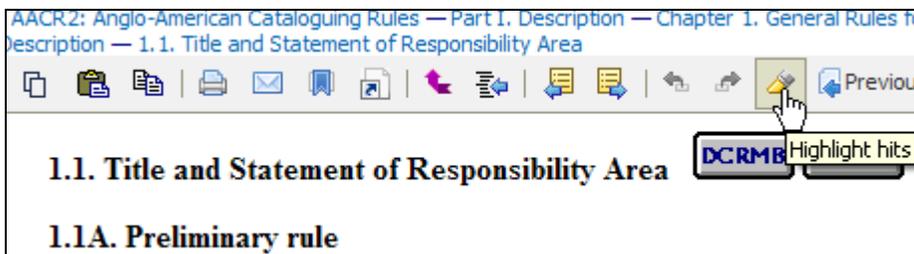
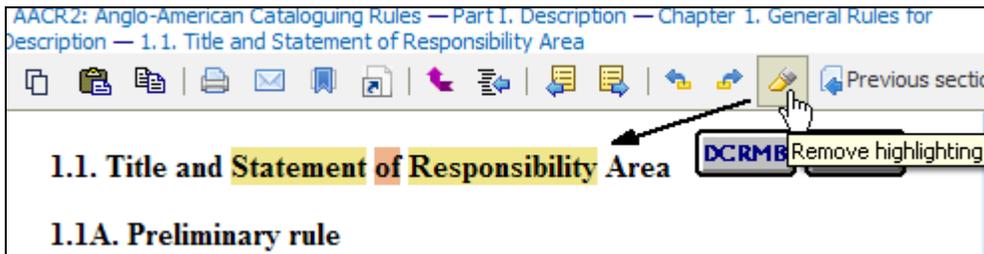
- Click on the box with the arrow coming out to the left to display the **Previous hit** instance of your search term highlighted in pink in the current document.



- Click on the box with the arrow coming out to the right to display the **Next hit** instance of your search term highlighted in pink in the current document.



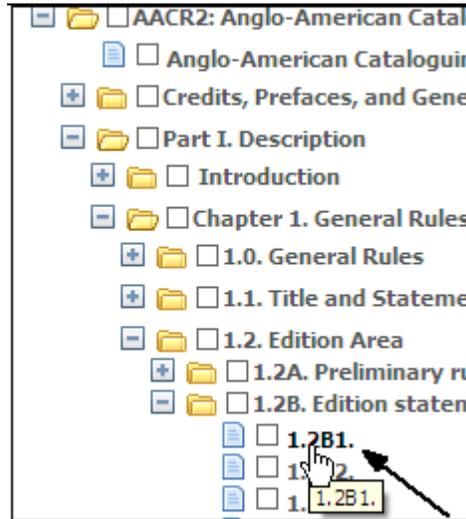
- Click the highlighter if you want to turn on or turn off the highlighting of words in the displayed document.



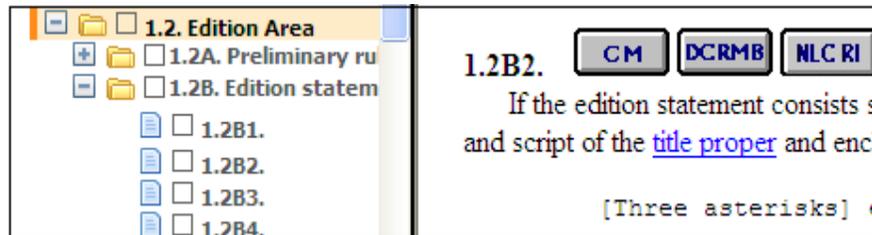
Topic 6 Browsing in CD3

Steps

1. You may want to consult a particular resource and are familiar with the structure so you may click on the + sign and open the folders until you locate the links to the items you need.
2. Click on the link and the item will display in the right pane.



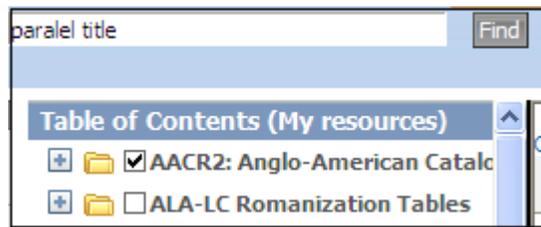
Note: The section for the documents is identified with an **orange** bar. Notice as you browse the right pane immediately displays the item you clicked.



Exercise:

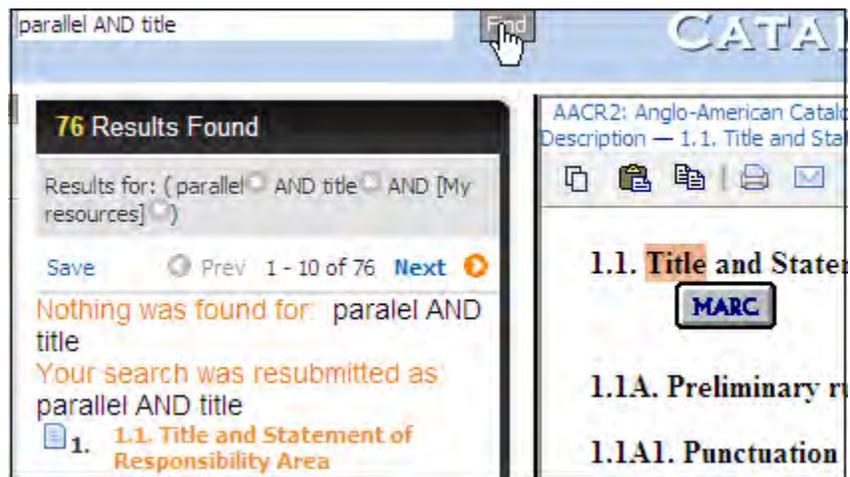
1. Locate the Local Processing Fields in Section C16 of the DCM public sections.
 2. When would you browse for an item rather than search for it? _____
- _____

2. Enter “**paralel title**” for the phrase “**parallel title**” in the search box and select AACR2.



3. Click **Find**. Notice how your misspelling is corrected in the search box.

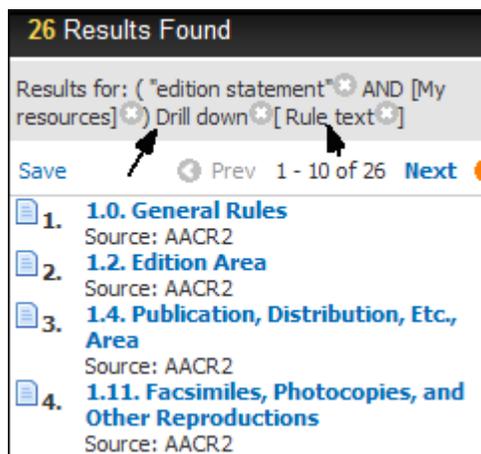
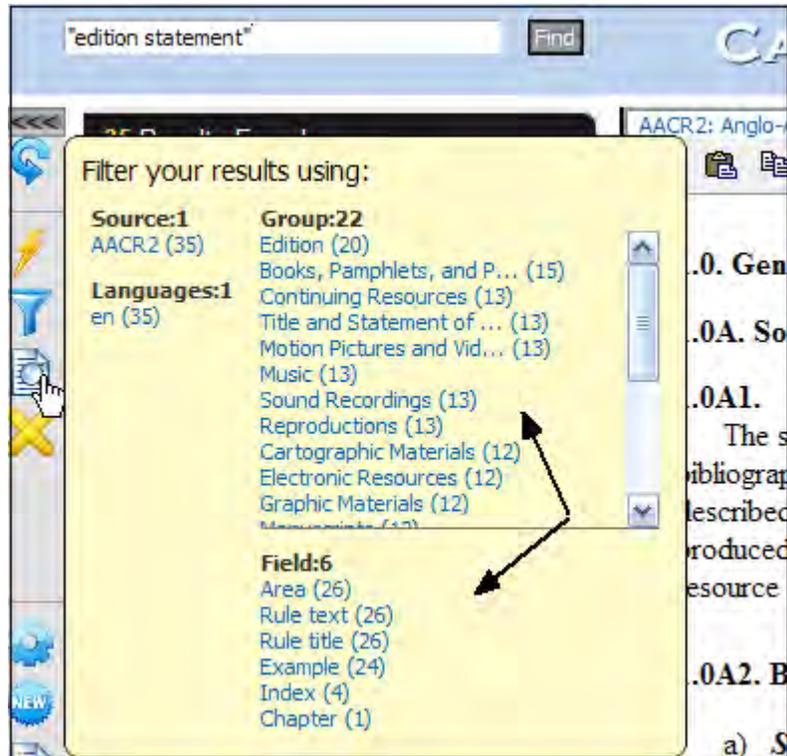
You have been advised that nothing was found for the misspelled word but the search was resubmitted with the correct spelling and retrieved your results.



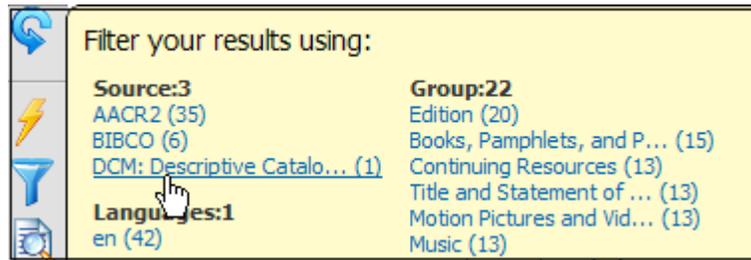
Topic 9 Drill-downs

Steps

1. You may refine your search from your search results by using the **MAGNIFYING GLASS** icon under the **FUNNEL** on your hits.
2. Enter "edition statement" and select AACR2 then click **Find**.
3. Select the **MAGNIFYING GLASS** icon and roll your mouse over to: **Source, Languages, Group** or **Field**.
4. Click a link under the category and your new result set will display.
5. We selected **Rule Text** under the **Field** category.



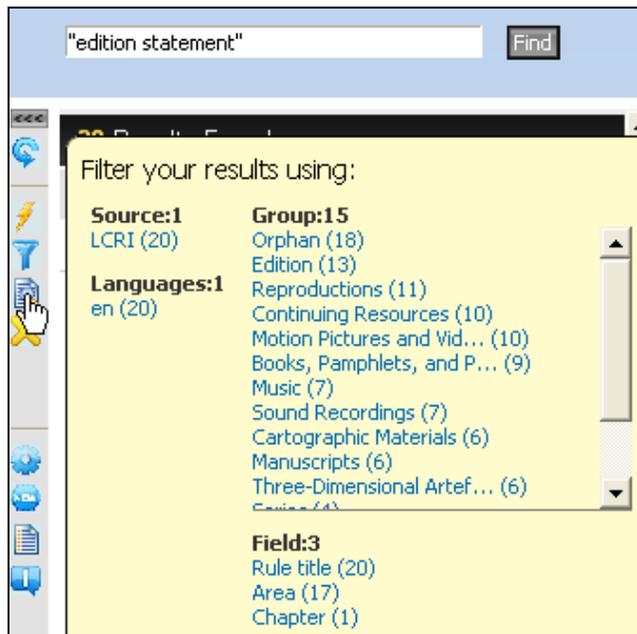
6. You may want to search in several sources and then just click a link under **Source** to see just the results from a particular resource.



Note: The numbers next to each link indicate the number of hits you will receive.

Exercises:

1. Clear your search and then search for “edition statement.” Redo the search just using the LCRI and then filter your results to just “sound recordings.”



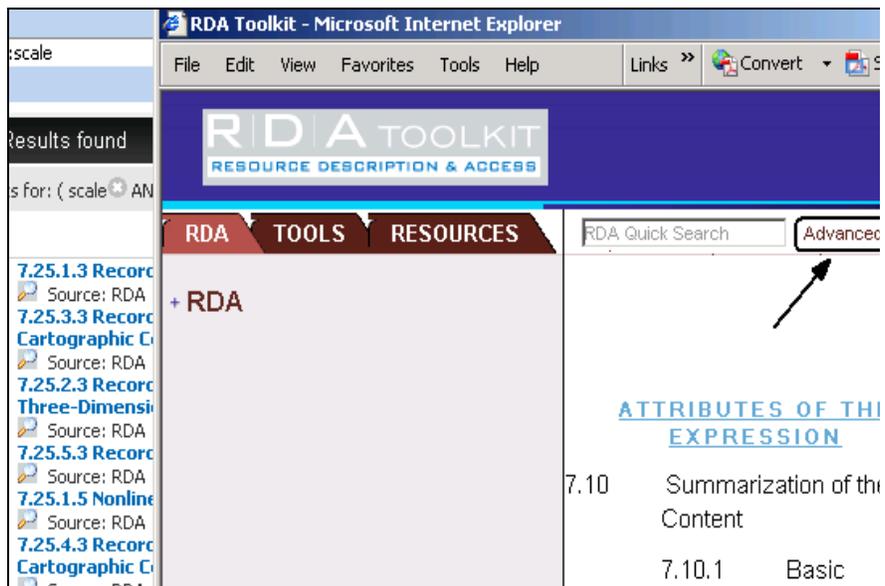
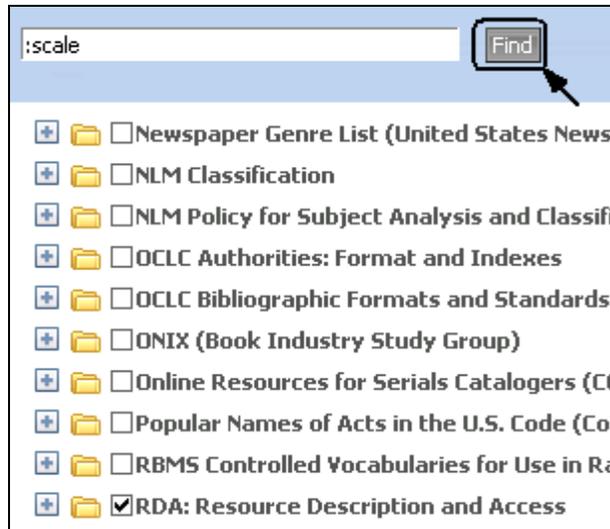
Clear your search and use the Quick tasks icon and select find a **MARC 21 tag** bibliographic and search for the **710** field.

Topic 10 Searching in RDA

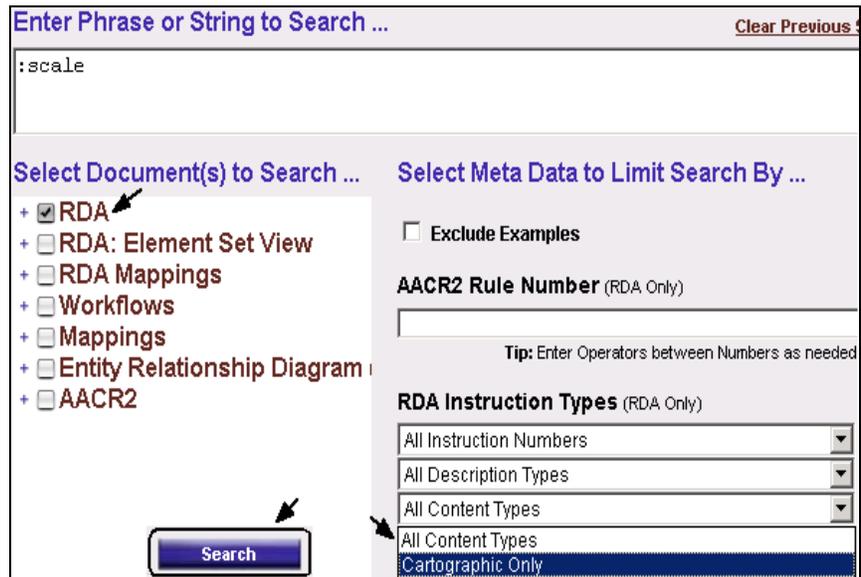
You may search directly RDA directly within Cataloger’s Desktop if you have RDA to your “My Resources” table of contents. In this scenario, a cataloger may want information about scale while cataloging a map.

Steps

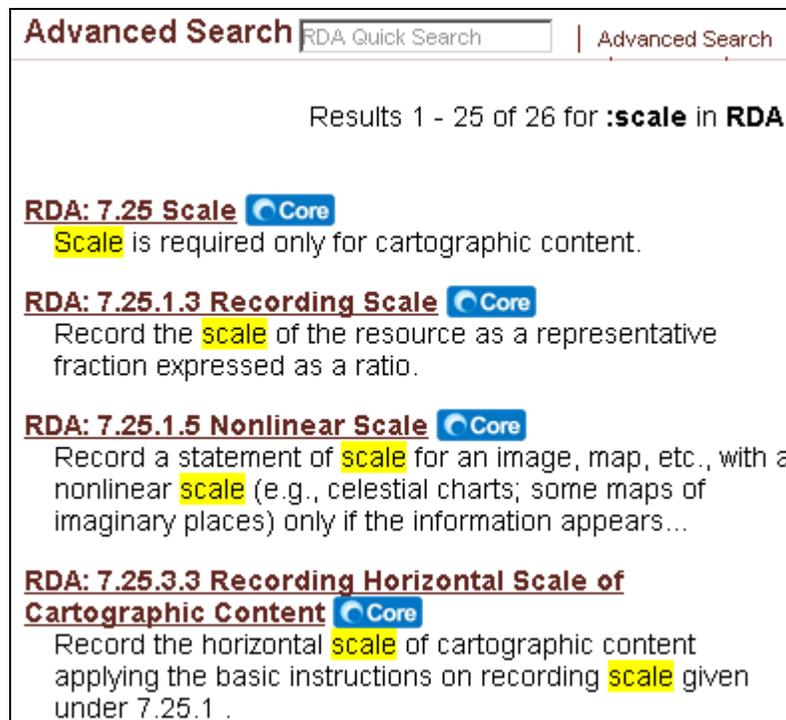
1. Put a check mark in **RDA**.
2. Enter “**:scale**” and then click **Find**.
3. Your search results will display on the left and if you asked RDA to open in a new window, it will open with the first hit.
4. In this case you can click the **Advanced** search button because you want to distinguish between maps and musical scales.



5. Enter “:scale” and then put a check next to **RDA**.
6. In the **RDA Instruction Types** use the drop down arrow in **All Content Types** and select: **Cartographic Only**.
7. Click **Search**



8. Your results will be filtered for cartographic content.
9. You may close the new window to return to Cataloger's Desktop when you are finished with RDA.



UNIT 4: Bookmarks & Saved Searches

Topic 1 Creating Bookmarks

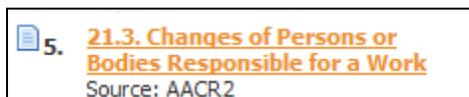
After you retrieve a document from your search results, you can set a **Bookmark** to save repetitive searching and speed up future retrieval for the same document.

Steps

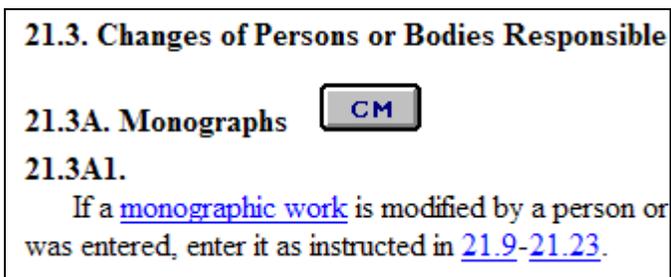
1. Enter a search. We have entered “**added entry**” and checked AACR2.



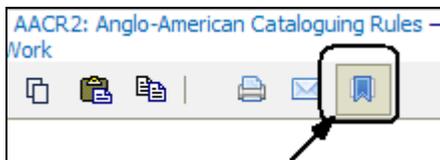
2. Select the hit you want to bookmark.



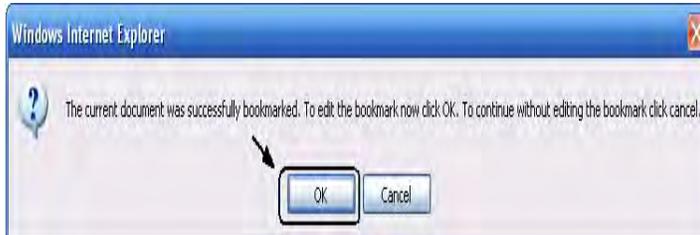
3. View the content to be bookmarked.



4. Select the **Bookmark** icon.

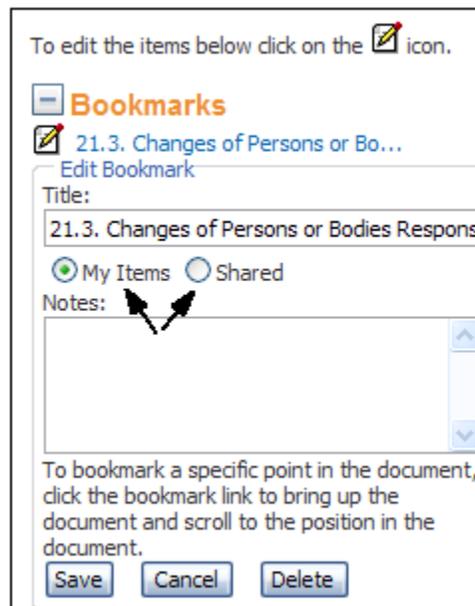


5. A window will open that give you the ability to click **cancel** to accept the default bookmark setting or click **OK** to edit the bookmark. We will edit the bookmark.



6. The bookmark dialog will appear in the left panel. You may change the title and/or add notes.

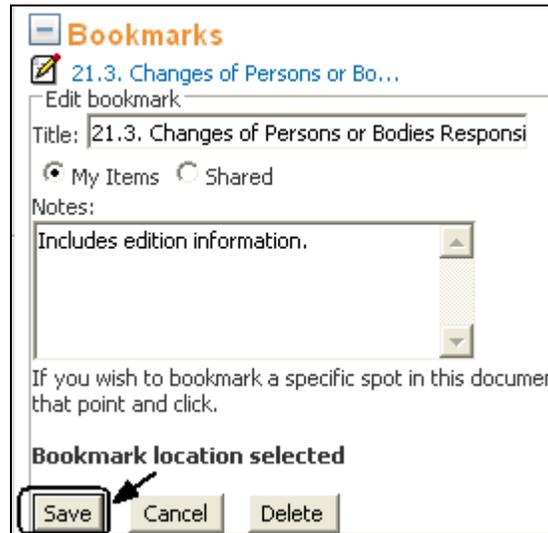
Notice: the default is **My Items** --your personal bookmark. You may select the radio button next to **Shared** to display your bookmarks to your colleagues.



- To add a note, click in the Notes section then click on the section of the text where you want to display the note. This will display as a yellow sticky in the place you bookmarked.

(Currently, this only works in Firefox. Your note will still be available if you roll your mouse over the bookmark link.)

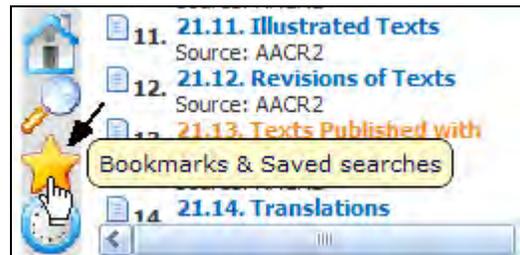
- Select **Save** after you have made your changes.



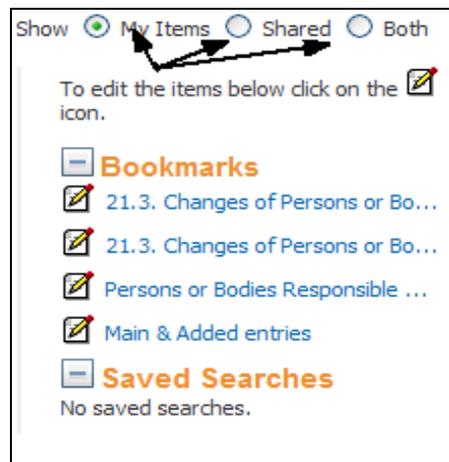
Topic 2 Retrieving Bookmarks and Notes

Steps:

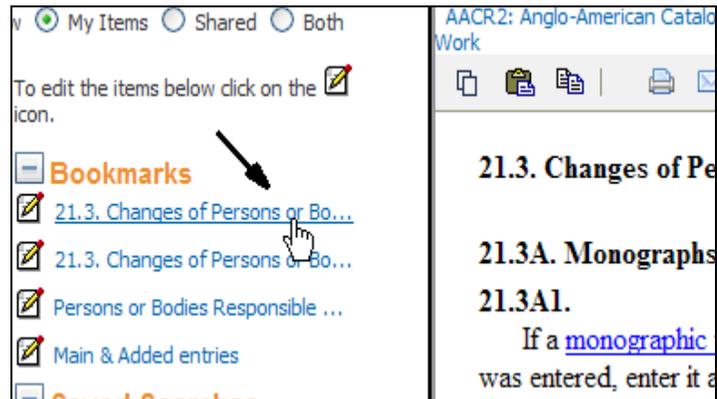
- Select the **Bookmarks & Saved searches** icon in the rail.



- Your bookmarks will display. You may switch to the shared bookmarks or see both.
- Select the link for the bookmark you want to display

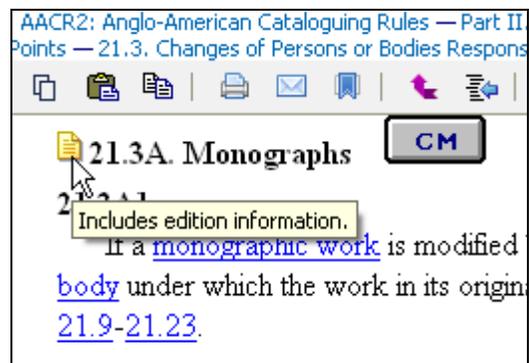


4. You may click on the link to display the text of the bookmarked document.



5. Your bookmarked section will appear with your yellow sticky note if you are using Firefox.

6. Roll your mouse over the sticky note and your note will appear.



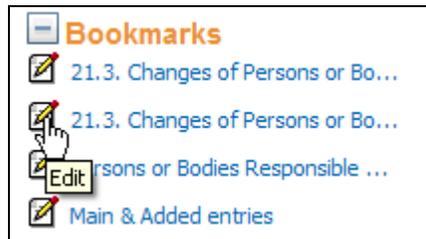
Exercises:

1. Create a bookmark in a resource that you use frequently but want to consult.
2. Select **OK** and edit your bookmark for your title and add a note.
3. Retrieve your bookmark.
4. Roll your mouse over your note.
5. How would you use this feature in your work? _____

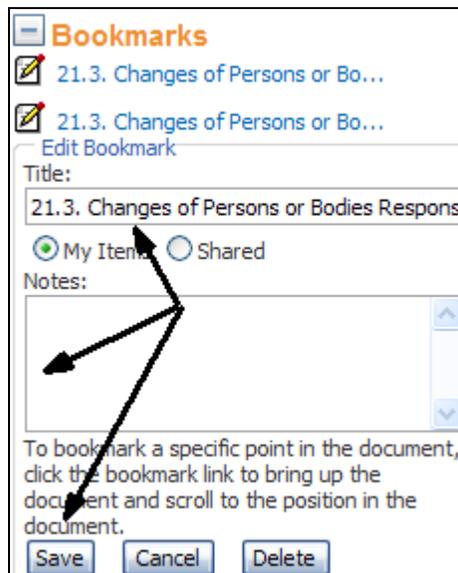
Topic 3 Editing Bookmarks

Steps:

1. Retrieve your bookmark and then select **Edit** icon before the bookmark you want to edit.



2. The selected bookmark will open with the form to change the title and/or note. As soon as you press **Save** your bookmark will contain your edits.



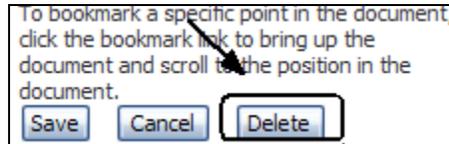
Topic 4 Deleting Bookmarks

Steps:

1. Select the **Edit** icon next to the Bookmark you want to delete.



2. Click on the **Delete** Button.



Topic 5 Saving & Retrieving Searches

A new capability in CD3 is the Saving Searches feature. If you have created a special search strategy that has brought you very good results, you may want to save this search string for future use. Sometimes if you are instructing someone, you may want to have some searches prepared ahead of time.

Steps:

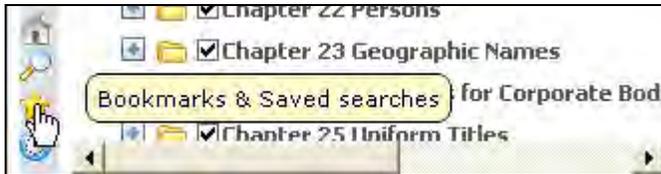
1. Enter your search terms and select your resources. Enter "**edition statement**" and select **AACR2** and **LCRI**.
2. View your search results and select the Save link.



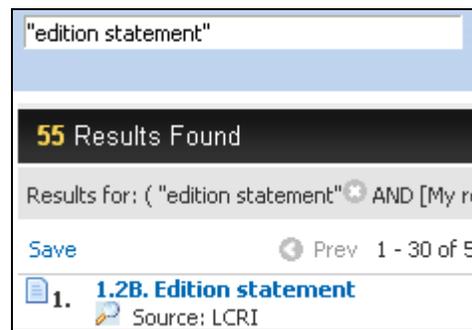
3. A window will open advising you that the search was saved. Select **OK**.



- To retrieve your search, select the **Star** in the rail.



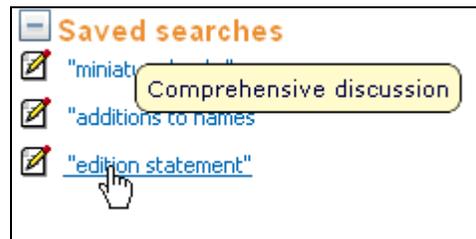
- You may select the link to redisplay your search results.



- Alternatively, you may select the paper and pencil icon to edit your search. You may add a note for example.



- Your saved search will appear in the left pane. You may roll your mouse over the saved search and view your note.

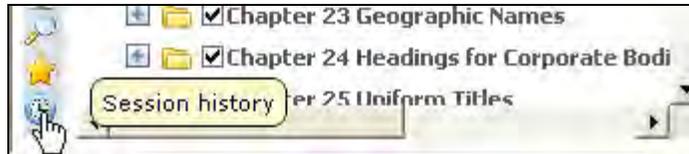


Topic 6 Saving Session History

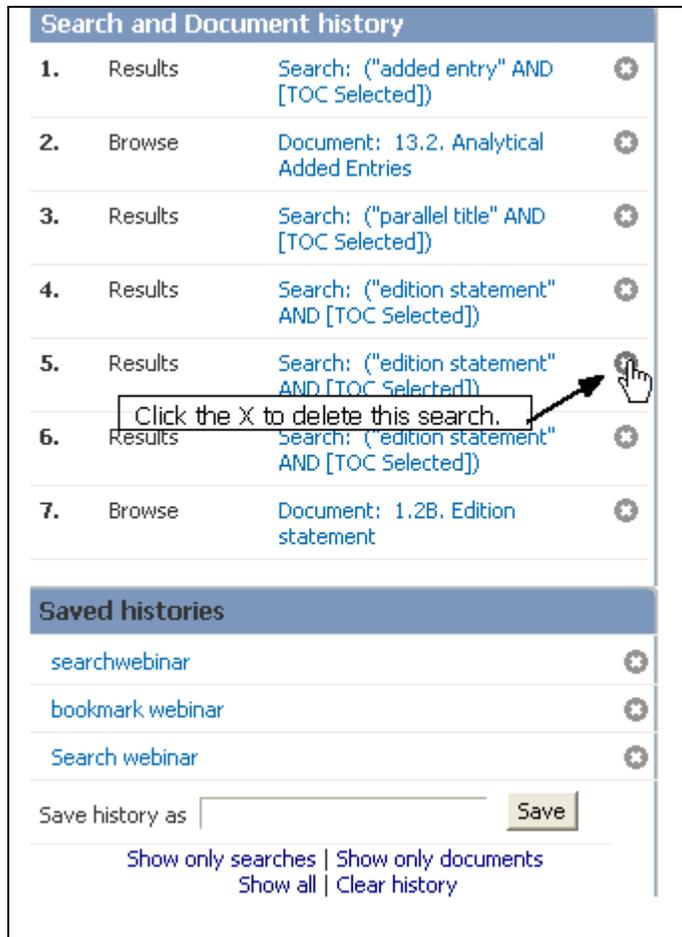
Another very nice new feature in CD3 is the ability to save your entire search session or just the searches you want to include.

Steps:

1. Select the **Clock** icon to go to your session history.

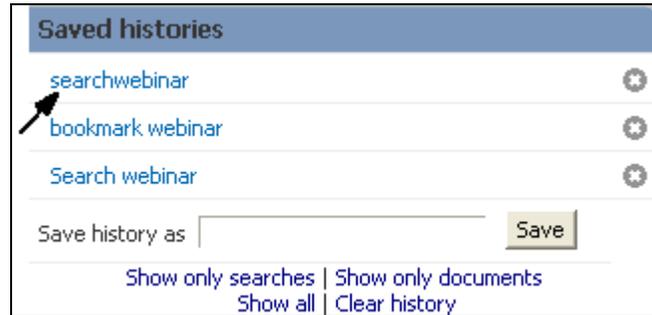


2. You can save your session history with options to just save searches, only documents or all items.



3. If there were searches that are duplicates or that you don't want to save, you may click the X and they will be deleted.
4. When you are ready, click in the **Save history as** and **name your Session history** and select **Save**.
5. If you don't need a Saved history any more you may select the **X** at the end of the line and delete it.

- You may select the link to redisplay that **Saved history** session.



- When your selected **Search and Document history** displays you may delete selected items and then either save the session with the same or different name.

This session history might be useful if you are instructing or mentoring someone.



Exercise:

- Select the **Clock** session history icon and then retrieve your **Saved history**.
- Delete an item from your session history.
- Resave the session history either with the same name to overwrite or with a different name if you want to maintain an altered search history.
- How could you use search history in your work? _____
