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

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INITIAL LOGIN

The login procedure for CD4 is the same as it was for CD3—only a personal email address and password are required. To log in, use https://desktop.loc.gov/.

CD3 (Preferences Set Up)

PREVIOUSLY, 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—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, instead they will be greeted by a simple search box with “Core resources” showing as the default resource type. From here, users may begin searching straightaway.

The resource types in CD3 were configured in three categories:

- **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 need to access most often.
GENERAL PREFERENCES (1): Change resource type setting here. Then click “Apply.”

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

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

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

NOTE: Whichever resources are 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

PREVIOUSLY 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.

*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**.

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### 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 the beginning
- **Start Over:** Returns to a blank Search screen
- **Start Over:** Returns to a particular search term
Quick Tasks: Used to support specific cataloging tasks or special searches

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

Collapse TOC: Used to compress the TOC after it has been expanded

Clear TOC Checkboxes: Used to un-check selected resources

Quick Tasks:
- I want to...
- Find a bib record
- Build a bib record
- Find a name record
- Build a name authority
- Describe a work
- Find a subject
- LCM
- LMM
- Find a genre term
- Assign a call number
- Library
- MARC
- MARC
- MARC 21 tag
- Authority
- Bibliographic
- Holdings

Quick Filters:
- Show all resources
- Show my resources
- User LC resources
- I need information about cataloging...
- Everything
- Cartographic materials
- Electronic resources
- Metadata
- Motion pictures
- Music & sound recordings
- Print & photographs
- Rare materials
- Special & integrating resources

CD4 FUNCTIONS (Cont’d.)

Browse by Task: found under Contents

Cataloging Task: found under Contents

Browse by Material Type: found under Contents

Resource filter: found under Contents

Clear/Collapse all: found after performing a search
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) earlier

What’s New? found under Support
- Acknowledgments
- Acronyms
- Contact Us
- Feedback
- Training & Tutorials

What’s New? found under Support

Cataloger’s Desktop Acronyms: found under Support
- Acknowledgments
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Help links are found throughout Desktop

Help: Used to access training resources and other informational documents

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.

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

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

**Bookmarks & Saved searches**

**Session History**

**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)

**CD4 FUNCTIONS**

*(Cont’d.)*

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

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

**Start Over:** Returns to blank Search screen.

**Bookmarks, Saved Searches & Session History** functions will be discussed in the next section: FAVORITES.

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.

<table>
<thead>
<tr>
<th>Function</th>
<th>(1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td></td>
</tr>
<tr>
<td>Bookmarks</td>
<td>(2)</td>
</tr>
<tr>
<td>Session History</td>
<td>(3)</td>
</tr>
<tr>
<td>Saved Searches</td>
<td>(4)</td>
</tr>
<tr>
<td>Shortcuts</td>
<td>(5)</td>
</tr>
</tbody>
</table>

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 new function creates web links that are transferrable to other locations/documents.
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 which 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
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

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.

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.
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