Tracing Material Within the Catalog Department Workflow

A *tracer* or *trace* is a request for material that, typically, has been received in the Catalog Department but has not yet been cataloged. Library staff submit tracers on behalf of patrons who urgently need specific material when no other available resource will suffice.

If a patron's need for the material is known at the time of ordering, the selector should provide a note to the Acquisitions Order staff, either within the email request to order the material or within the Gobi order (field OrdNote1). After material has been ordered and an order record is in Millennium, a patron hold may be placed on the material. This will ensure that the patron is notified as soon as the material reaches the shelving location.

A tracer may be placed:

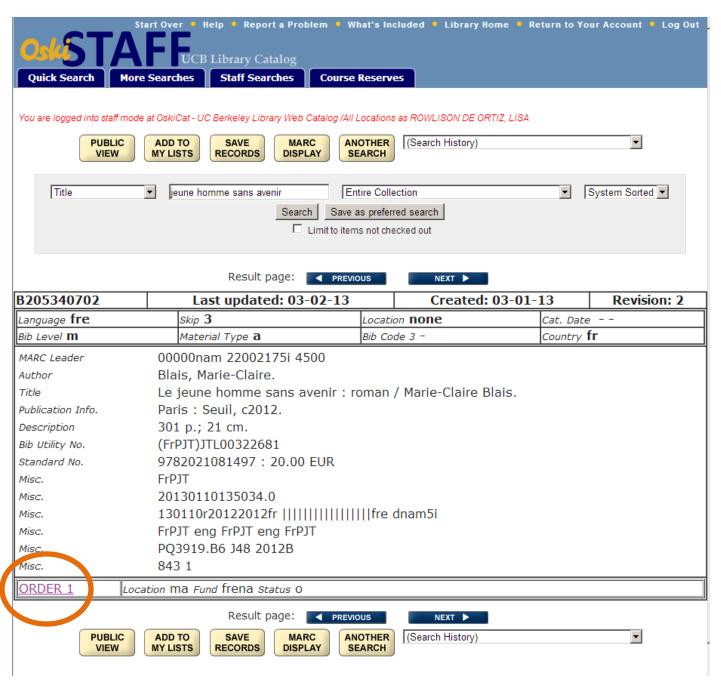
- 1. on behalf of Faculty
- 2. on behalf of Graduate Students
- 3. on behalf of Undergraduates
- 4. by Library staff preparing for an exhibit or author talk
- 5. by selectors to track/locate expensive or rare material (e.g. material over \$1,000)
- 6. for material needed for course reserve
- 7. for items not yet cataloged which have a Millennium Order Record Received Date 6 months prior to the current date

In cases 1-5 above, a patron hold must be placed on the material before or simultaneously with the tracing request. To place a hold, see: Holds and OskiCat Request

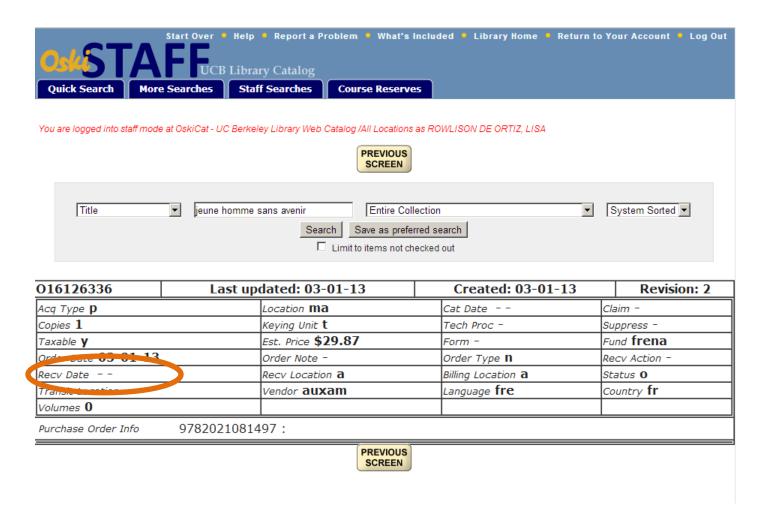
The following procedure details how to initiate a tracing request:

- 1. Confirm that the item has been RECEIVED, and is not merely on order. To do so:
 - a. Log into OskiCat Staff Mode.
 - b. Search for your title.
 - c. If it shows an order record, click on the order record.
 - d. If the desired item does not have an order record, a tracer cannot be placed for the item. Without an order record and a received date there is no way to tell whether the item has arrived from the vendor.
 - e. If an Order Record is present, look at the Received Date.
 - f. If the <u>Received Date is blank</u>, then the item has NOT yet arrived within the Library and a tracer cannot be placed. If a patron wants an item that has not yet been received, the patron should place a HOLD so the material is directed to them when available.
 - g. If a <u>Received Date is present</u>, the item can be traced. Note the Received Date, as it will be needed to complete the BadCat tracing form.
- 2. If the item is needed by faculty, staff, or student, a hold is required. Please have the user place a hold on the material.
- 3. Go to the BadCat form, select "Trace Material" as the Request Type, and fill out all the required fields.

NOTE: In the case of material which has left the Catalog Department and has been sent for binding, please follow the specific tracing guidelines on AskTico for materials at the Bindery/Conservation/Preservation: Tracing Material Within the Conservation Department



Click Here to Return to Main Text



Since this order record does NOT have a received date (Recv Date circled in orange above), the title is on order, but it has not been received. A trace cannot be placed on this material. However, a patron may place a hold.

Click Here to Return to Main Text



You are logged into staff mode at OskiCat - UC Berkeley Library Web Catalog /All Locations as ROWLISON DE ORTIZ, LISA



PREVIOUS

016112635	Last up	dated: 03-13-13	Created: 02-22-1	3	Revision: 4	
Acq Type p		Location ma9n	Cat Date	Cla	Claim -	
Copies 1		Keying Unit t	Tech Proc -	Su	opress -	
Taxable Y		Est. Price \$27.44	Form -	Fur	nd litrm	
Ord Date UZ 22 13		Order Note -	Order Type n	Red	cv Action -	
Recv Date 03-13-13		Recv Location a	Billing Location a	Sta	ntus a	
Transaction		Vendor yank	Language und	Cor	untry XX	
Volumes 0						
Purchase Order Info Paid	9780231161237 Inv# 223367 Dated:02-21-13 Amt:\$29.91 On:03-13-13 Voucher#340357 For 001 copies					

PREVIOUS SCREEN

This order record HAS a received date (Recv Date circled in orange above), so a tracer may be placed on this material.

Click Here to Return to Main Text