

# Cleaning Up “In Transit” Items

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## Introduction

Whether it's from staff workflow errors, delivery problems, software bugs, or other issues, your library likely has items with an "In Transit" status that are not actually in transit. The workflow below is to tidy your own library's "in transit" materials.

In the Resource Request Monitoring list, there are two different facets where these materials can be found.

**Note:** When doing clean-up workflows of items with an "In Transit" status, it's recommended that you begin with the "Transit for Reshelving" facet. This will simplify the clean-up process for the "Transit Item" facet.

1. The **Request/Process Type** facet of **Transit for Reshelving**.
  - a. This only includes your items being returned to your shelves.
  - b. This is a subset of the "Transit Item" Workflow Step facet mentioned below.
2. The **Workflow Step** facet of **Transit Item**. (Note that this is a "Workflow Step" facet, not a "Workflow Step Status" facet.)
  - a. This includes your items being returned to your shelves, as well as your items that are going out to a different location.

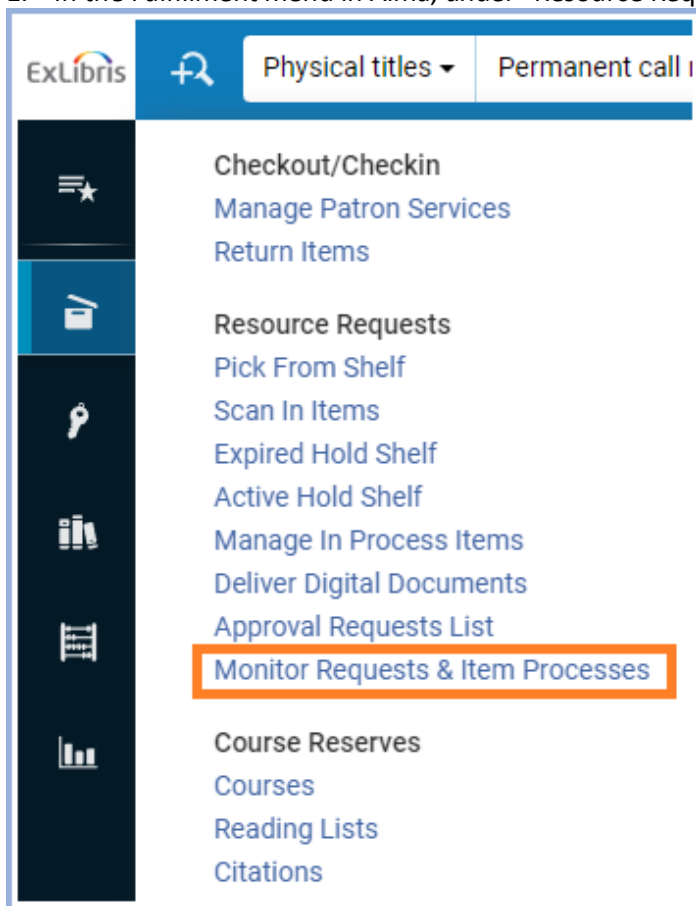
## “Transit for Reshelving” Request/Process Type Facet

### Basic Steps:

- Select “Monitor Requests & Item Processes” from the Fulfillment menu in Alma.
- Clear any facets you’ve already selected.
- Select the following facets:
  - Owner: your library
  - Request/Process Type: Transit For Reshelving
  - Request Date: Up to a month ago *or* Older (follow the process with each facet separately, since they can’t both be applied at one time)
- Proceed based on the “Managed by” field (either “Managed by Department” or “Managed by Library”).
  - If it’s Cataloging or TECHSER Acquisitions Department:
    - Check your shelves.
      - If you find it, scan it in at your Circulation Desk.
      - If you don’t find it, mark it as Missing.
  - If it’s another UIUC workflow department:
    - Check your shelves.
      - If you find it, scan the item in at the appropriate workflow department. (You may need to email the department to ask them to do it for you.)
        - After that, scan it in at your Circulation Desk.
      - If you don’t find it, mark it as Missing.
  - If it’s a UIUC departmental library:
    - Check your shelves.
      - If you find it, scan it in at your Circulation Desk.
      - If you don’t find it, ask the departmental library to do a shelf check.
        - If they find it, have them send it back to you, and then scan it in at your Circulation Desk.
        - If they don’t find it, mark it as Missing.
  - If it’s an I-Share institution:
    - Check your shelves.
      - If you find it, scan it in at your Circulation Desk.
      - If you don’t find it, contact Central Circulation ([circlib@library.illinois.edu](mailto:circlib@library.illinois.edu)) and ask them to contact the I-Share institution to request a shelf check. Include the Request ID and the item’s title, author, call number, and barcode in your email.
        - If the I-Share Library finds it, they will scan it and send it back to your library.
        - If they don’t find it, Central Circulation will be in contact with the next steps.
  - If there isn’t a “Managed by” field:
    - Check the Creator field to determine which department or library the request is managed by, and then choose the appropriate section above.
- Once you’ve cleaned up the list for one Request Date facet (either “Up to a month ago” or “Older”), remove that facet and select the other one. Finish cleaning up the list for that facet, using the directions above.

## Detailed Workflow:

1. In the Fulfillment menu in Alma, under “Resource Requests”, select “Monitor Requests & Item Processes”.



2. This will take you to the Resource Request Monitoring screen.

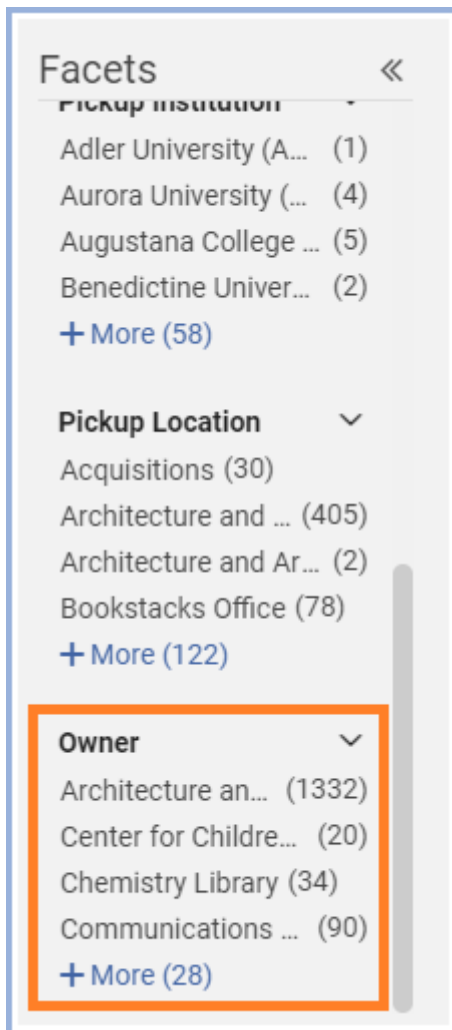
The screenshot shows the 'Resource Request Monitoring' interface. On the left, there are facets for 'Type', 'Material Type', 'Workflow Step', and 'Request/Process Type'. The main area displays a list of requests. The first request is for 'Guardianship of the elderly : a primer for attorneys / [Erica F. Wood and N.E.H. Hull]'. The second request is for 'Let me sleep, sheep! / Meg McKinlay ; illustrated by Leila Rudee'. The interface includes filters for 'Activity Status' and 'Include Pending Resource Sharing Requests', and a 'Clear all' link. Each request entry has a 'Cancel' button and a 'Print Slip' button.

**Note:** If you have any facets already selected, click the “Clear all” link near the top of the list to clear them.

This screenshot shows the same 'Resource Request Monitoring' interface, but with facets selected: 'Material Type : DVD' and 'Request Date : Up to a month ago'. An orange arrow points to the 'Clear all' link, which is used to clear the selected facets. The list shows the first item, 'Amarcord / Federico Fellini ; Franco Cristaldi presenta un film'.

3. In the Facets sidebar on the left side, scroll down to the “Owner” facets and select your departmental library. This will update the list to only include your items.

**Note:** Whenever you’re selecting a facet, you may need to expand the list by clicking “+ More” at the bottom of the section.



The image shows a sidebar titled "Facets" with a back arrow icon. It contains three sections: "Pickup Institution", "Pickup Location", and "Owner". The "Owner" section is highlighted with an orange border. Each section lists several options with item counts and a "+ More" link.

Facet	Item	Count
Pickup Institution	Adler University (A...	(1)
	Aurora University (...)	(4)
	Augustana College ...	(5)
	Benedictine Univer...	(2)
	+ More	(58)
Pickup Location	Acquisitions	(30)
	Architecture and ...	(405)
	Architecture and Ar...	(2)
	Bookstacks Office	(78)
	+ More	(122)
Owner	Architecture an...	(1332)
	Center for Childre...	(20)
	Chemistry Library	(34)
	Communications ...	(90)
	+ More	(28)

4. In the Facets sidebar, scroll to the “Request/Process Type” facets and select “Transit For Reshelving”. There are other facets that include similar terms, so check that you’re using the correct one.

Facets <<

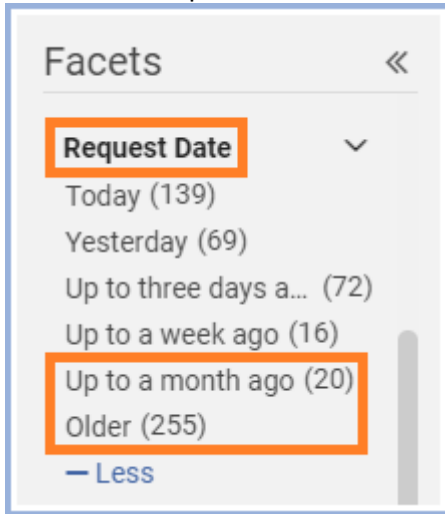
In Process (35266)

**Request/Process Type**

- Acquisition te... (656) ▾
- CMS Off-site Di... (9881)
- CMS Project (2)
- ACS Cataloging (1041)
- Communications Li... (1)
- Grainger Work Ord... (11)
- HPNL Work Order D... (1)
- International and... (150)
- Move permanently (16)
- Move temporarily (1)
- Patron physical i... (354)
- Preservation Se... (1203)
- Restore item (1)
- Teaching, Learning,... (3)
- Transit For Resh... (577)**
- Bookstacks Office (74)
- Special Project (24871)


— Less

5. There are no options for sorting the list in a specific order, but you can filter it with the “Request Date” facets. The Request Date should be long enough ago that it’s unlikely that the item is actually in transit.
  - a. The Request Date facets of “Up to a month ago” (which means older than one week ago but no more than one month ago) and “Older” (which means older than a month ago) are recommended.
  - b. You can only select one Request Date facet at a time, so you may need to do this process with one Request Date facet and then repeat it with the other one if there are requests in both.




6. Check the “Managed By” field for each request to see what to do with it next. (This may say “Managed by Department” or “Managed by Library”.)

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**Lake Valley Back Country Byway.**

**Request Type:** Transit For Reshelving  
**ID:** 26056444780005899  
**Creator:** [Redacted]   
**MMS ID:** 99955195908805899  
**Pickup Location:** Main Stacks  
**Barcode:** 30112127412598

**Place in Queue:** 0  
**Call Number:** DOC. I 53.11:L 14 V/  
**Description:** 2022  
**Request Date:** 08/18/2022  
**Material Type:** Map

[Print Slip](#) [Update Expiry](#) [...](#)

**Workflow Step:**  
Transit Item

**Process Status:** In Process

**Managed By Department:** TECHSER Acquisitions Department


**Process Date:** 08/18/2022

**Expiration Date:** 08/19/2022



a. If it's **Cataloging** or **TECHSER Acquisitions Department**:

- i. Look for the item on your own shelves.
  1. If it is found, scan the item in at your Circulation Desk.
  2. If it isn't found, update the item's status to Missing by selecting the "Mark as Missing" option for the request. This will also cancel the request.  
**Note:** You may need to use the "... " (More Actions) button to get the "Mark as Missing" option.

1  **Igniting research for outdoor recreation : linking science, policy, and action / Steven Selin [and three others], editors.** [Print Slip](#) [Update Expiry](#) ...

**Request Type:** Transit For Reshelving **Place in Queue:** 0 **Workflow:** Transit Item  
**ID:** 10492902320005899 **Call Number:** DOC. A 13.88:PNW-987 **Process Status:** In Process  
**Creator:** [redacted] **Request Date:** 08/28/2020 **Managed By:** Department: Cataloging  
**MMS ID:** 99954784698905899 **Material Type:** Book **Process Date:** 08/28/2020  
**Pickup Location:** Main Stacks **Expiration Date:** 08/29/2020  
**Barcode:** 30112120186256

b. If it's **another UIUC workflow department** (such as Preservation or Digitization):

- i. Look for the item on your own shelves.
  1. If it is found, scan the item in at the appropriate workflow department.
    - a. If you can't do this yourself, email the item's barcode to that workflow department and ask them to "scan it in" for you (that is, enter the barcode in the "Scan In Items" screen).
    - b. Once it's been "scanned in" at the workflow department, scan the item in at your Circulation Desk.
  2. If it isn't found, update the item's status to Missing by selecting the "Mark as Missing" option for the request. This will also cancel the request.  
**Note:** You may need to use the "... " (More Actions) button to get the "Mark as Missing" option.


c. If it's a **UIUC departmental library**:

- i. Look for the item on your own shelves.
  1. If it is found, scan the item in at your Circulation Desk.
  2. If it isn't found on your shelves, ask the other departmental library to do a shelf check. Include the item's title, author, call number, and barcode.
    - a. If it is found there, have them route it to you so you can scan the item in at your Circulation Desk.
    - b. If it isn't found, update the item's status to Missing by selecting the "Mark as Missing" option for the request. This will also cancel the request.  
**Note:** You may need to use the "... " (More Actions) button to get the "Mark as Missing" option.

d. If it's an I-Share institution:

- i. Look for the item on your own shelves.
  1. If it is found, scan the item in at your Circulation Desk.
  2. If the item isn't found on your own shelves, contact Central Circulation at [circlib@library.illinois.edu](mailto:circlib@library.illinois.edu) and ask them to contact the other I-Share library to request a shelf check. In your email, please include the Request ID (listed as "ID" in the request in Alma), along with the item's title, author, call number, and barcode.

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### Survivor / by Octavia E. Butler.

**Request Type:** Transit For Reshelving  
**ID:** 43668608060005899  
**Creator:** System#####01CARLI\_SAI  
**MMS ID:** 99855505312205899  
**Pickup Location:** Main Stacks  
**Barcode:** 30112122112870

**Place in Queue:** 0  
**Call Number:** PS3552.U827 S87 1979  
**Request Date:** 05/28/2024  
**Material Type:** Book

**Workflow Step:** Transit Item  
**Process Status:** In Process  
**Managed By Library:** [01CARLI\_SAI] - MAIN  
**Managed By Desk:** DEFAULT\_CIRC\_DESK  
**Process Date:** 05/28/2024  
**Expiration Date:** 05/28/2024

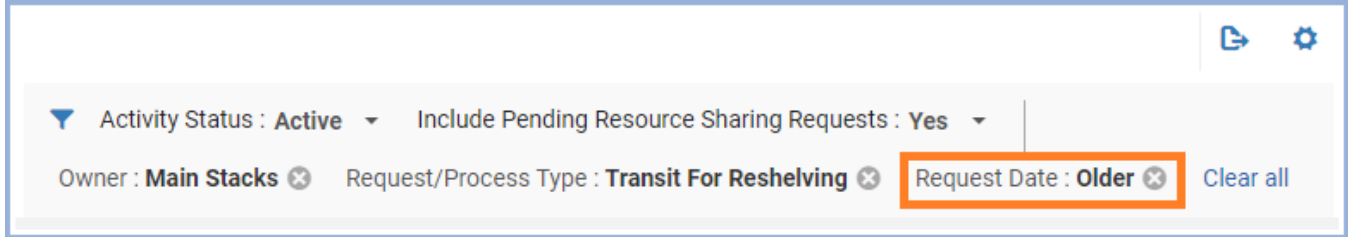
Update Expiry Mark as Missing ...

- a. If it is found at that I-Share institution, it will be routed back to you so you can scan it in at your Circulation Desk.
- b. If it isn't found there, Central Circulation will be in contact with the next steps.

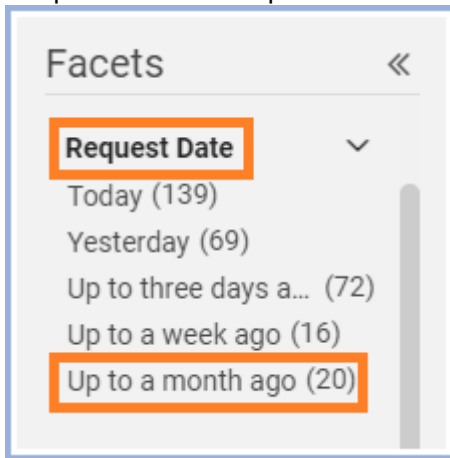
e. If it doesn't have a "Managed By" field:

- i. This is rare. If it does happen, check the Creator field to determine which department or library the request is managed by, and then choose the appropriate section above.

7. Once you're done with all the items in the list, remove the "Request Date" facet you selected by clicking the circled "x" next to it at the top of the list.



8. Check the "Request Date" facets and see if there are any requests in the facet that you haven't done yet (either "Older" or "Up to a month ago"). If so, select that facet. Then go back to [step 6](#) and repeat the process to clean up that facet.



## “Transit Item” Workflow Step Facet

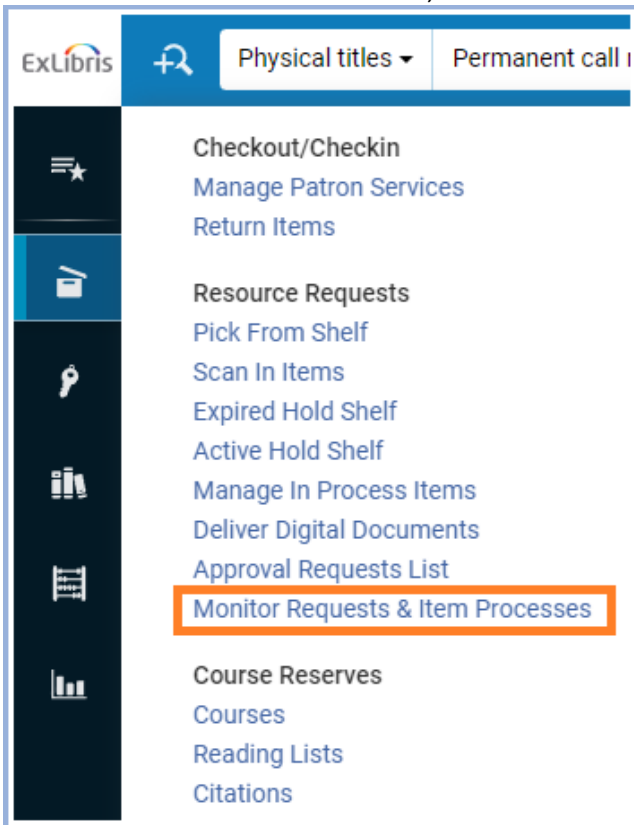
### Basic Steps:

- Select “Monitor Requests & Item Processes” from the Fulfillment menu in Alma.
- Clear any facets you’ve already selected.
- Select the following facets:
  - Owner: your library
  - Workflow Step: Transit Item
  - Request Date: Older
- If you’ve already cleaned up the list of requests in “Transit For Reshelving” facet discussed above, then select the following facet as well:
  - Request/Process Type: Patron physical item request
- For each request, determine if it’s from a local or I-Share patron.
- For requests by **local patrons**:
  - Check your shelves for the item.
    - If you find it, determine if the patron may still want the item. If you think they do, contact them from your library’s shared email account to find out. If not, skip to “If the patron doesn’t want the item...”
      - If the patron says that they want the item, process it to be put on hold for them.
        - If the request’s expiration date is any time prior to two weeks from today, use “Update Expiry” to update it to two weeks from now.
        - Scan in the item at your Circulation Desk to print a Hold Slip or Routing Slip. Put the slip in the item and send it to the appropriate Hold Shelf.
      - If the patron doesn’t want the item, cancel the request from the Resource Request Monitoring list, and then scan the item in at your Circulation Desk.
        - To cancel the request, select the “Cancel” option on the right side of the request. (You may need to use the “...” button to get that option.)
          - Pick an appropriate reason from the drop-down menu.
          - Make sure the “Notify user” checkbox is not checked.
    - If you don’t find it, mark the item as Missing from the Resource Request Monitoring List. This will also cancel the request.
      - Select the “Mark as Missing” option on the right side of the request. (You may need to use the “...” button to get that option.)
- For requests by **I-Share patrons**:
  - Check your shelves for the item.
    - If you find it, cancel the request from the Resource Request Monitoring list, and then scan the item in at your Circulation Desk.
      - To cancel the request, select the “Cancel” option on the right side of the request. (You may need to use the “...” button to get that option.)
        - Pick an appropriate reason from the drop-down menu.
        - Make sure the “Notify user” checkbox is not checked.
    - If you don’t find the item, contact Central Circulation ([circlib@library.illinois.edu](mailto:circlib@library.illinois.edu)) and ask them to contact the I-Share institution to request a shelf check. Include the Request ID and the item’s title, author, call number, and barcode in your email.

- If they find the item, the patron’s request will be cancelled, and the item will be sent back to you so you can scan it in at your Circulation Desk.
- If they don’t find it, Central Circulation will follow up with the next steps.

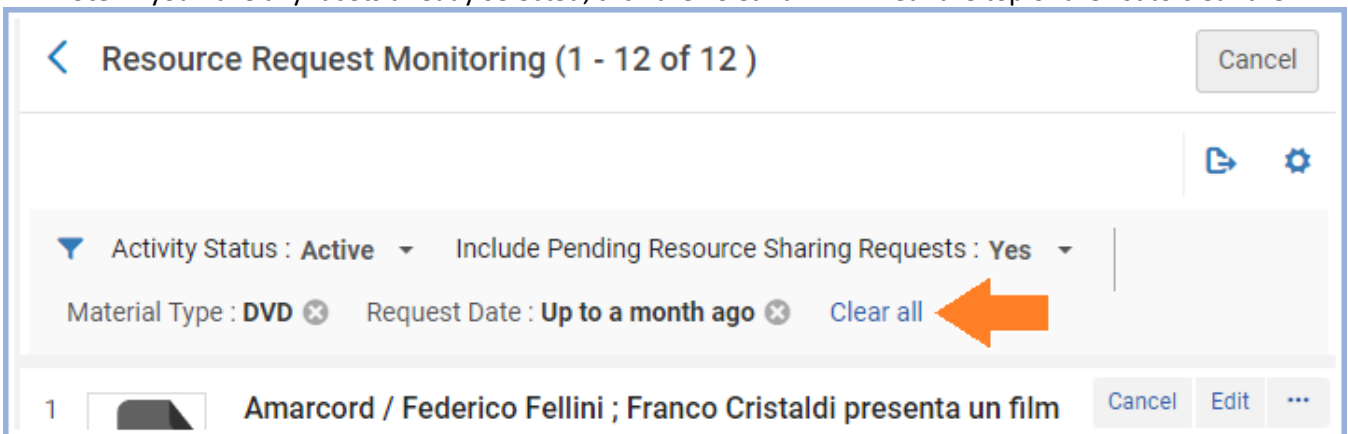
**Detailed Workflow:**

1. In the Fulfillment menu in Alma, under “Resource Requests”, select “Monitor Requests & Item Processes”.



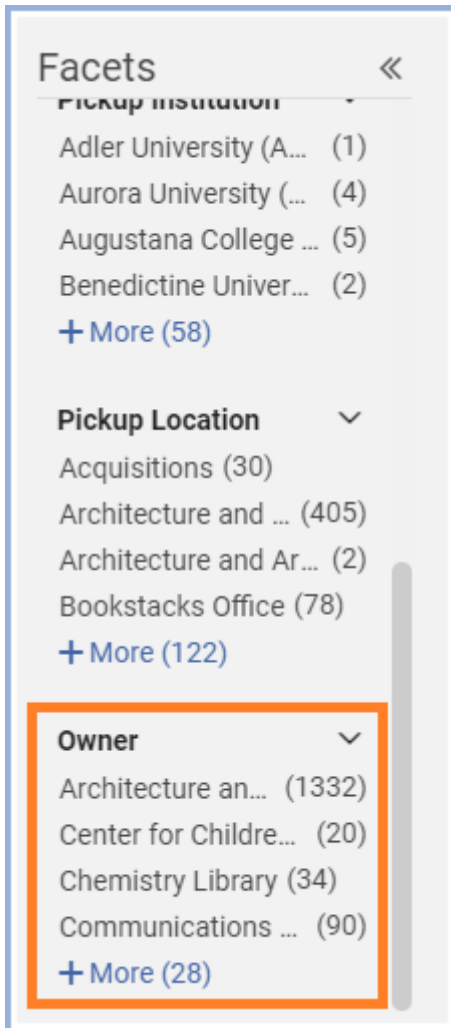
2. This will take you to the Resource Request Monitoring screen.

**Note:** If you have any facets already selected, click the “Clear all” link near the top of the list to clear them.

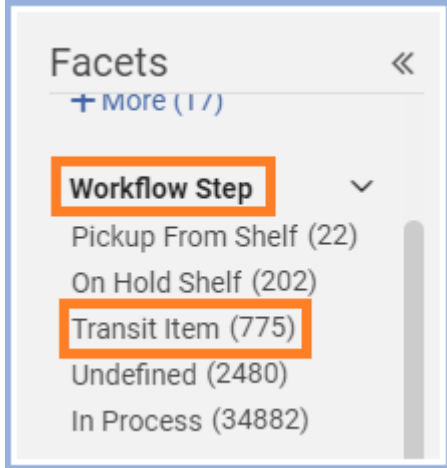


3. In the Facets sidebar on the left side, scroll down to the “Owner” facets and select your departmental library. This will update the list to only include your items.

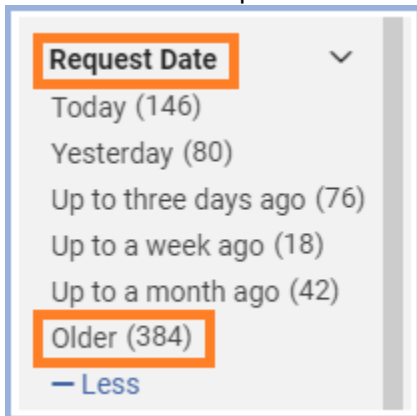
**Note:** Whenever you’re selecting a facet, you may need to expand the list by clicking “+ More” at the bottom of the section.



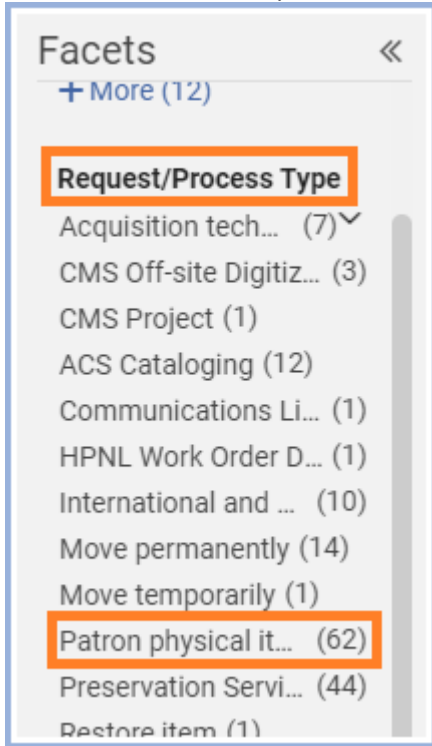
4. In the Facets sidebar, scroll to the “Workflow Step” facets and select “Transit Item”.  
**Note:** This is not the same as the “Workflow Step *Status*” facet.



5. There are no options for sorting the list in a specific order, but you can filter it with the “Request Date” facets. The Request Date should be long enough ago that it’s unlikely that the item is actually in transit.  
a. The Request Date facet of “Older” (which means older than a month ago) is recommended.



6. If you have already finished cleaning up the “Transit For Reshelving” facet, you can apply a secondary filter to limit the list of results within this facet:
- a. In the “Request/Process Type” facets, select “Patron physical item request”.




- b. This limits the list to your items that are that are outgoing for pick-up at another location or institution, or that are involved in a workflow process at your institution (such as Acquisitions).



7. For each request, determine if it's from a local or I-Share patron.


**Note:** If the request says "Fulfillment Network Institution Code" or "Fulfillment Network Borrowing ID", it's from an I-Share patron.



9  **China and East Africa : ancient ties, contemporary flows / edited by** Cancel Print Slip ...  
**Chapurukha M. Kusimba, Tiequan Zhu, and Purity Wakabari Kiura.**

<b>Request Type:</b> Patron physical item request	<b>Place in Queue:</b> 0	<b>Workflow Step:</b> Transit Item
<b>ID:</b> 43443694300005899	<b>Call Number:</b> DT365.3 .C55 2020	<b>Process Status:</b> In Process
<b>Creator:</b> [REDACTED]	<b>Request Date:</b> 05/16/2024	<b>Managed By Library:</b> Main Stacks
<b>MMS ID:</b> 99949088812205899	<b>Material Type:</b> Book	<b>Managed By Desk:</b> Main Stacks
<b>Requester:</b> [REDACTED]		<b>Process Date:</b> 05/16/2024
<b>Pickup Location:</b> Illinois Math and Science Academy (IMS) — Aurora, IL - Leto M. Furnas Information Resource Center		<b>Expiration Date:</b> 05/23/2024
<b>Barcode:</b> 30112126592523		
<b>Fulfillment Network Institution Code:</b> 01CARLI_IMS		
<b>Fulfillment Network Borrowing ID:</b> 01CARLIIMS0008996		


a. **Requests by local patrons**

- i. Look for the item on your own shelves.
  1. If it is found, determine if it's a request where the patron may still wish to have the item (such as an Acquisitions hold).
    - a. If you think the patron may still want it, contact them from your library's shared email account to ask.
      - i. If they still want it, process the item to be put on hold for them.
        1. If the request's expiration date is in the past (or less than two weeks in the future), change it by clicking the "..."  
(More Actions) button on the request, selecting "Update Expiry", and clicking the date on the calendar that's two weeks after today. If the expiration date is already at least two weeks from now, continue.

104  **The Library at Mount Char / Scott Hawkins.**

**Request Type:** Patron physical item request  
**ID:** 44572714130005899  
**Creator:** [Redacted]   
**MMS ID:** 99779369512205899  
**Requester:** [Redacted]   
**Pickup Location:** Main Stacks  
**Barcode:** 30112113595745

**Place in Queue:** 0  
**Call Number:** PS3608.A893464 L5 2015  
**Request Date:** 01/01/2024  
**Material Type:** Book


Cancel Print Slip 


- Edit
- Update Expiry**
- Mark as Missing
- View Title in Search
- View Audit Trail
- Convert to Resource Sharing

01/02/2024  
**Expiration Date:** 02/01/2024

2. Scan in the item at your Circulation Desk to prepare the hold for the patron.
3. This will print a Hold Slip or Routing Slip, depending on the pick-up location. Put the slip in the item and send the item to the appropriate location.

- b. If you think (or know) that the patron no longer wants the item, cancel the request from the Resource Request Monitoring list, and then scan in the item.
  - i. Click the “Cancel” button near the right side of the request. You may need to use the “...” (More Actions) button to get that option.

8  **Rethinking rural : global community and economic development in the small town West / Don E. Albrecht.** Cancel Print Slip ⋮

<p><b>Request Type:</b> Patron physical item request</p> <p><b>ID:</b> 43012106660005899</p> <p><b>Creator:</b> System</p> <p><b>MMS ID:</b> 99753224112205899</p> <p><b>Requester:</b> <span style="background-color: #ccc; padding: 2px 10px;">                    </span> </p> <p><b>Pickup Location:</b> SSHEL</p> <p><b>Barcode:</b> 30112113588385</p>	<p><b>Place in Queue:</b> 0</p> <p><b>Call Number:</b> HN79.A17 A43 2014</p> <p><b>Request Date:</b> 04/29/2024</p> <p><b>Material Type:</b> Book</p>	<p><b>Workflow Step:</b> Transit Item</p> <p><b>Process Status:</b> In Process</p> <p><b>Managed By Library:</b> Main Stacks</p> <p><b>Managed By Desk:</b> Main Stacks</p> <p><b>Process Date:</b> 04/29/2024</p> <p><b>Expiration Date:</b> 05/29/2024</p>
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- ii. The “Confirm Request Cancellation” window will pop up.
  1. Select a cancellation reason that makes sense for the situation.
  2. Make sure that the “Notify user” checkbox is not checked. We don’t want to email the patron about these old requests.
  3. Click the “Confirm” button. Alma will confirm that the request is canceled.

### Confirm Request Cancellation

---

Cancellation reason Cannot be fulfilled ▼

Cancellation note

Notify user

---

Back Confirm

- iii. Scan in the item at your Circulation Desk.


2. If the item is not found on your shelves, mark the item as “Missing” from the Resource Request Monitoring List. This will also cancel the request.
  - a. Select the “Mark as Missing” option for the request. You may need to use the “...” (More Actions) button to get that option.

The screenshot displays a library request monitoring interface. On the left, a small book cover for 'The Epicurus Reader' is shown next to the number '63'. The main title of the request is 'The Epicurus reader : selected writings and testimonia / translated and edited, with notes, by Brad Inwood and L.P. Gerson ; introduction by D.S. Hutchinson.' Below the title, various request details are listed: Request Type (Patron physical item request), ID (44666346200005899), Creator, MMS ID (99367955012205899), Requester, Pickup Location (Grainger Engineering Library), and Barcode (30112002828710). To the right of these details, a summary of the request's status is provided: Place in Queue (0), Call Number (187 EP42E:E), Request Date (07/16/2024), and Material Type (Book). Further right, a 'Workflow' section lists 'Transit Item', 'Process Status', and 'Managed Library' (History, Philosophy and Newspaper Library). Below this, the 'Process Date' (07/16/2024) and 'Expiration Date' (08/15/2024) are shown. At the top right of the interface, there are buttons for 'Cancel', 'Print Slip', and a 'More Actions' button (three dots). A dropdown menu is open from the 'More Actions' button, with the 'Mark as Missing' option highlighted in orange. Other options in the menu include 'Edit', 'Update Expiry', 'View Title in Search', 'View Audit Trail', and 'Convert to Resource Sharing'.

- b. A confirmation message will ask if you’re sure you want to mark the item associated with the request as missing. Click “Confirm”.

b. Requests by I-Share patrons

- i. Look for the item on your own shelves.
  - 1. If it is found on your shelves, cancel the request from the Resource Request Monitoring list, and then scan in the item.
    - a. Click the “Cancel” button near the right side of the request. You may need to use the “...” (More Actions) button to get that option.

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**China and East Africa : ancient ties, contemporary flows / edited by** Cancel Print Slip ...  
**Chapurukha M. Kusimba, Tiequan Zhu, and Purity Wakabari Kiura.**

<b>Request Type:</b> Patron physical item request	<b>Place in Queue:</b> 0	<b>Workflow Step:</b> Transit Item
<b>ID:</b> 43443694300005899	<b>Call Number:</b> DT365.3 .C55 2020	<b>Process Status:</b> In Process
<b>Creator:</b> [Redacted]	<b>Request Date:</b> 05/16/2024	<b>Managed By Library:</b> Main Stacks
<b>MMS ID:</b> 99949088812205899	<b>Material Type:</b> Book	<b>Managed By Desk:</b> Main Stacks
<b>Requester:</b> [Redacted]		<b>Process Date:</b> 05/16/2024
<b>Pickup Location:</b> Illinois Math and Science Academy (IMS) – Aurora, IL - Leto M. Furnas Information Resource Center		<b>Expiration Date:</b> 05/23/2024
<b>Barcode:</b> 30112126592523		
<b>Fulfillment Network Institution Code:</b> 01CARLI_IMS		
<b>Fulfillment Network Borrowing ID:</b> 01CARLIIMS0008996		

- b. The “Confirm Request Cancellation” window will pop up.
  - i. Select a cancellation reason that makes sense for the situation.
  - ii. Make sure that the “Notify user” checkbox is not checked. We don’t want to email the patron about these old requests.
  - iii. Click the “Confirm” button. Alma will confirm that the request is canceled.

### Confirm Request Cancellation

Cancellation reason: Cannot be fulfilled ▼

Cancellation note:

Notify user:

Back Confirm

- c. Scan in the item at your Circulation Desk.

2. If the item is not found on your shelves, contact Central Circulation at [circlib@library.illinois.edu](mailto:circlib@library.illinois.edu) and ask them to ask the circulation staff at the I-Share pick-up location for a shelf check. In your email to Central Circulation, please include the Request ID (listed as "ID" in the request in Alma), along with the item's title, author, call number, and barcode.
  - a. If the item is found at the I-Share institution, Central Circulation will have the request cancelled and the item returned to you so you can scan it in at your Circulation Desk.
  - b. If the item is not found at the I-Share institution, Central Circulation will let you know what the next steps are.