

# Walk-in Users

Configuration and Workflow

## Who are Walk-in Users?

*Answer:*

Current students, faculty, and staff from another CSU campus who wish to check out materials on your campus.



## What is the CSU's policy?



*Answer:*

Currently each campus is **encouraged** to provide services to Walk-in Users during the pandemic.

# Configurations

# Configurations - Other CSU Users

## User Configurations

- User Group “CalState Walkin Patron” or similar
- Record Type Mapping Table

## Fulfillment Configurations

- Patron Limits Table
- Loan Limits Tables
- Fulfillment Rules for Loans and Requesting



# Configurations - Other CSU Users

## Linked Account Rules

### *Input Parameters*

- Name: Source Institution
- Operator: In List
- Value: All other CSU campuses

Name	Operator	Value
1 Source Institution	In List	Bakersfield, Channel Islands, Chico, Dominguez Hills, East Bay, Fresno, Fullerton, Humboldt, Long Beach, Los Angeles, Maritime, Monterey Bay, Moss Landing, Northridge, Pomona, Sacramento, San Bernardino, San Diego, San Jose, San Luis Obispo, San Marcos, Sonoma, Stanislaus

### *Output Parameters*

Output Parameters	
User Group	<b>CalState Walkin Patrons</b>
Expiry Date	-
Expiry From Source	<b>Same as in source</b>
Refresh Expiry Date	<b>Yes</b>
Purge Date	-
Purge After Expired	<b>One month after expiration</b>
Refresh Purge Date	<b>Yes</b>
Resource sharing library	
Copy Network Blocks	<b>Yes</b>

# Configurations - Your Users

## Restricted Users Table

Defines users who are **not** eligible to receive services at other campuses.

Enabled	Move Up	Move Down	Code	Description	Default Value
<input checked="" type="checkbox"/>		▼	Alumni Association ▼	Alumni Association	<input type="radio"/>
<input checked="" type="checkbox"/>	▲	▼	Friends of the Library ▼	Friends of the Library	<input type="radio"/>

Include user groups except those for student, staff, faculty, visiting scholar, & emeriti.

# Configurations - Your Users

## Network Blocks

Network blocks are copied to the other CSU with the user information.

### User Block Description Table

This table list your current blocks.

Review blocks and add any that may be needed to block users on other campuses.

### User Block Definitions Table

Define each block in the Network Block column.

- True: block copied
- False: block not copied

Recommended Network Blocks:  
employee separation, deceased users

# Configurations - Your Users

## Linked Account Shared Fields

Defines user record fields to be shared consortially.

### Shared Fields

- First Name
- Middle Name
- Last Name
- PIN\*
- Expiry date
- Purge date
- Email address

Define each shared field:

- True: field shared
- False: not shared

Field Name	Shared
First Name	True

\*If your campus requires a PIN and one is not shared, you will need to create one.



# Workflow Demo

# Questions?

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Walk-in Users Configuration:

<https://calstate.atlassian.net/wiki/spaces/ULMSA/pages/1523810317/Cal+State+Walk-in+User+Visiting+Patrons+Configurations>

Walk-in Users Workflow:

<https://calstate.atlassian.net/wiki/spaces/ULMSA/pages/1562673177/Cal+State+Walk-in+User+Visiting+Patrons+Workflow>