

## CalState Walk-In User Policy Recommendations

Amended per feedback received from ULMS Access Services listserv on 6/13/19.

Submitted by:

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### **CalState Walk-In user Minimum Standards Policies**

What services are being offered to Walk-in Users?

What is the process for requesting items owned by a host campus?

What about requesting CSU+ items with the host campus as the "borrowing" campus?

Will we offer use of physical facilities past regular open hours where available (such as student-only extended hours)?

What users/user groups are entitled to these services and how do we verify that these users are eligible?

What user data is shared from campus to campus and how will billing the user work if they accrue fines or fees of any sort?

What about courtesy returns?

### **Other Configuration Recommendations**

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Searchable Identifiers

# CalState Walk-In user Minimum Standards Policies

## *Definitions:*

*Home campus - the campus with which the Walk-in User has an ID.*

*Host campus - the campus the Walk-in User is visiting*

What services are being offered to Walk-in Users?

Circulation services are offered for the **regular circulating print collection**.\*

The suggested loan policies at the Host campus will be a minimum 60 days for the length of the loan (the same as CSU+ loan) and a minimum limit of 20 loans.\*\*

Guest access and use of computer labs, if possible and relevant to the campus.

*\*Special Collections, Media Items, LP Records, Equipment, Current Periodicals, Course Reserves, Reference Items, etc. are up to each campus' discretion.*

*\*\*These are the **minimum** standards, but campuses with more generous loan policies regarding Walk-In Patrons may continue using their own policies, if desired.*

What is the process for requesting items owned by a host campus?

Requests for items owned by the host campus will be placed manually by staff since the user will not be able to log in to the host campus' OneSearch account to place requests with their home campus ID.

What about requesting CSU+ items with the host campus as the "borrowing" campus?

Like regular holds, host campus library staff will place manual requests for the user since the user will not be able to log in to the host campus' OneSearch account to place requests with their home campus ID.

*Background on this decision: We explored changing the Cal State Walk-in User account from external to internal users, which requires assigning passwords, but we do not recommend that policy at this time because this will cause the account not be linked to the home campus, resulting in contact information, expiration dates, and blocks not to be updated and thereby leaving the host campus at risk of loss of materials. The changing of patron type also requires User Manager intervention. We may revisit this if the demand on staff time to place requests is too great. We are also hopeful that with a greater number of institutions engaging in shared networks, that the pickup anywhere functionality will be enhanced and made less labor intensive to resource sharing staff.*

Will we offer use of physical facilities past regular open hours where available (such as student-only extended hours)?

Yes, as long as they can be verified with home campus ID or state/driver's ID and successful log in to their home campus OneSearch account. Access to areas only accessible using an automated system (such as an ID card swipe) that cannot accommodate other campus IDs may be limited for walk-in users. However, the task force recommends each library work with their campus to provide access to these areas for these students, if possible. Such use supports student learning and success by aligning CSU library services more closely with student needs regardless of campus of enrollment.

What users/user groups are entitled to these services and how do we verify that these users are eligible?

Current Staff, Faculty, Emeriti, Visiting Scholars, and currently enrolled students are considered affiliated with the CSU and are therefore eligible for walk-in privileges. To prove eligibility, they must show their university ID. Public users and Alumni are ineligible for walk-in privileges.

*Note: Distance learners are considered eligible for walk-in privileges. However, they may not have a physical University ID card. If your campus does not have a written policy requiring a physical University ID and a distance learning user wants to create a Walk-in User library account, a successful log in to their home campus OneSearch account and some form of a picture ID such as a passport, driver's license, or state ID should be sufficient to create the account with your campus.*

What user data is shared from campus to campus and how will billing the user work if they accrue fines or fees of any sort?

The same rules apply here as they do for CSU+. The host library that checks out the item to the user is responsible for enforcing fines and fees associated with that item. All notifications go through the host campus. Please see the section marked "Linked Account Shared Fields" for more information regarding what fields should be brought over from the home campus.

If a CalState Walk-In user accumulates fines or overdue items at the host campus is not responding to overdue and billing notices, host campus can contact the home campus to discuss methods for resolution.

What about courtesy returns?

Cal State Walk-in Users may return items they checked out at another CSU library to a different CSU library. Alma does not currently provide a method to track these items or a process for courtesy returns. However, to facilitate the item returning to its home library, it is suggested that CSU resource sharing

staff send an email to the resource sharing staff at the owning library explaining that the item was returned and is being shipped via courier. The email sent to the owning library should include the book's barcode. Upon receiving the email, the owning library should check in the book to complete the loan cycle which will remove any potential fines or registration holds from the end user's account. The email will also provide an unofficial record that the patron returned the item even if the item never shows up at the owning library. If the item is not received at the home library, follow the Resource Sharing "CSU+ Items returned and not received at the lending library" procedures.

## Other Configuration Recommendations

### Cal State Walk-in Loan and Request TOUs

Ensure that the Calstate Walk-in user group loan TOUs are set up to borrow only the items that they are eligible to check out, e.g. main print collection, and are excluded from items they are not eligible to borrow, e.g. equipment.

Ensure that the Cal State Walk-in User group is set up to allow them to request items from the host institution and resource sharing.

### Walk-in users Linked Account Rule

*This is separate from the default linked account rule and should be created as its own separate entity*

User group = CalState Walk-in user group

Expiry Date = blank

Expiry from Source = Same as in Source

Refresh Expiry Date = Yes

Purge Date = Blank

Purge After Expired = One Month after Expiration (or local campus rules for expiry dates, if applicable)

Refresh Purge Date = yes

Resource Sharing Library = Your Campus Resource Sharing Library

Copy Network blocks = Yes (see area marked Network Blocks in this document for more information)

### Find User in Other Institution Discoverability Restrictions

To restrict what users are discoverable in the "find user in other institution" step, go to Alma Configuration-> User Management -> Collaborative Networks -> Restricted Users table. Each campus will have to add any locally created user groups that the campus does NOT want exposed to the network such as internal users, non-CSU Walk-in Users, public users, alumni, etc. to this table. Make sure that they're enabled and that the default value is set to **No**. The description can be whatever you want it to

be, but the code must be the same code that's being used for users elsewhere to have the correct mapping. Add new rows if you have new rows that need to be added. See the section above on which users receive walk-in privileges: Current Staff, Faculty, Emeriti, Visiting Scholars, and currently enrolled students. All others should be listed here.

## Network Blocks

Each campus should set their network block in the linked account rule table to true. This is to prevent blocked users at their home campus from opening an account at another CSU. Fines or fees from the home institution will not be carried over to the host institution, only the associated blocks that will come over through the network.

Two tables must be customized for network blocks to be applied at a host institution: **User Block Description** and **User Block Definitions**. Add a consortial block to the descriptions table, then add this block to this User Block Definitions table. Any block you mark as **True** under the Network Block column will be passed over to the host institution. Any block marked **False** will not. We recommend setting blocks to true such as those for employee clearances, separation from the CSU, and deceased users.

## Linked Account Shared Field

*This is information that will be shared with the host institution. Host institutions may have their own contact requirements they will want to add on their end such as a phone number or address.*

Primary ID (home campus ID)

First name

Middle name

Last name

PIN (If host campus requires PIN and PIN does not come through, they will need to manually add one)

Expiry date

Purge date

Email Address

## Searchable Identifiers

Do not customize this table. It will disallow searching for a user by the primary ID field.