Group	Setting	Description	Data Type	Notes
Cataloguing	Default copy status (fast add)	Default status when a copy is created using the "Fast Item Add" interface.	Selection List	Default : In process
Cataloguing	Default copy status (normal)	Default status when a copy is created using the normal volume/copy creator interface.	Selection List	Default : In process
Circulation	Auto_Extend Grace Periods	When enabled grace periods will auto-extend. By default this will be only when they are a full day or more and end on a closed date, though other options can alter this.	True/False	
Circulation	Auto-Extending Grace Periods extend for all closed dates	If enabled and Grace Periods auto-extending is turned on grace periods will extend past all closed dates they intersect, within hard-coded limits. This basically becomes "grace periods can only be consumed by closed dates".	True/False	
Circulation	Auto-Extending Grace Periods include trailing closed dates	If enabled and Grace Periods auto-extending is turned on grace periods will include closed dates that directly follow the last day of the grace period, to allow a backdate into the closed dates to assume "returned after hours on the last day of the grace period, and thus still within it" automatically.	True/False	
Circulation	Block hold request if hold recipient privileges have expired		True/False	
Circulation	Cap max fine at item price	This prevents the system from charging more than the item price in overdue fines	True/False	
Circulation	Charge fines on overdue circulations when closed	When set to True, fines will be charged during scheduled closings and normal weekly closed days.	True/False	
Circulation	Checkout fills related hold	When a patron checks out an item and they have no holds that directly target the item, the system will attempt to find a hold for the patron that could be fulfilled by the checked out item and fulfills it. On the Staff Client you may notice that when a patron checks out an item under a title on which he/she has a hold, the hold will be treated as filled though the item has not been assigned to the patron's hold.	True/False	
Circulation	Checkout fills related hold on valid copy only	When filling related holds on checkout only match on items that are valid for opportunistic capture for the hold. Without this set a Title or Volume hold could match when the item is not holdable. With this set only holdable items will match.	True/False	

Circulation	Checkout auto renew age	When an item has been checked out for at least this amount of time, an attempt to check out the item to the patron that it is already checked out to will simply renew the circulation. If the checkout attempt is done within this time frame, Evergreen will prompt for choosing Renewing or Checkin then Checkout the item.	Duration	
Circulation	Do not change fines/fees on zero-balance LOST transaction	When an item has been marked lost and all fines/fees have been completely paid on the transaction, do not void or reinstate any fines/fees EVEN IF circ.void_lost_on_checkin and/or circ.void_lost_proc_fee_on_checkin are enabled	True/False	
Circulation	Do not include outstanding Claims Returned circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button. This setting will prevent Claims Returned circulations from counting toward these tallies.	True/False	
Circulation	Hold shelf status delay	The purpose is to provide an interval of time after an item goes into the on-holds-shelf status before it appears to patrons that it is actually on the holds shelf. This gives staff time to process the item before it shows as ready-for-pickup.	Duration	
Circulation	Include Lost circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button. This setting will include Lost circulations as counting toward these tallies.	True/False	
Circulation	Long-Overdue Check-In Interval Uses Last Activity Date	Use the long-overdue last-activity date instead of the due_date to determine whether the item has been checked out too long to perform long-overdue check-in processing. If set, the system will first check the last payment time, followed by the last billing time, followed by the due date. See also circ.max_accept_return_of_longoverdue	True/False	
Circulation	Long-Overdue Items Usable on Checkin	Long-overdue items are usable on checkin instead of going "home" first	True/False	
Circulation	Long-Overdue Max Return Interval	Long-overdue check-in processing (voiding fees, re-instating overdues, etc.) will not take place for items that have been overdue for (or have last activity older than) this amount of time	True/False	
Circulation	Invalid patron address penalty	When set, if a patron address is set to invalid, a penalty is applied.	True/False	

Circulation	Load patron from Checkout	When scanning barcodes into Checkout auto-detect if a new patron barcode is scanned and auto-load the new patron.	True/False	
Circulation	Item status for missing pieces	This is the Item Status to use for items that have been marked or scanned as having Missing Pieces. In the absence of this setting, the Damaged status is used.	Selection List	
Circulation	Lost checkin generates new overdues	Enabling this setting causes retroactive creation of not-yetexisting overdue fines on lost item checkin, up to the point of checkin time (or max fines is reached). This is different than "restore overdue on lost", because it only creates new overdue fines. Use both settings together to get the full complement of overdue fines for a lost item	True/False	
Circulation	Lost items usable on checkin	Lost items are usable on checkin instead of going 'home' first	True/False	Default : False
Circulation	Max patron claims returned count	When this count is exceeded, a staff override is required to mark the item as claims returned.	Number	
Circulation	Maximum visible age of User Trigger Events in Staff Interfaces	If this is unset, staff can view User Trigger Events regardless of age. When this is set to an interval, it represents the age of the oldest possible User Trigger Event that can be viewed.	Duration	
Circulation	Minimum transit checkin interval	In-Transit items checked in this close to the transit start time will be prevented from checking in	Duration	
Circulation	Patron merge address delete	Delete address(es) of subordinate user(s) in a patron merge.	True/False	Default : True
Circulation	Patron merge barcode delete	Delete barcode(s) of subordinate user(s) in a patron merge	True/False	Default : False
Circulation	Patron merge deactivate card	Mark barcode(s) of subordinate user(s) in a patron merge as inactive.	True/False	Default : True
Circulation	Patron Registration: Cloned patrons get address copy	If True, in the Patron editor, addresses are copied from the cloned user. If False, addresses are linked from the cloned user which can only be edited from the cloned user record.	True/False	

Circulation	Require matching email address for password reset requests	Require matching email address for password reset requests	True/False	
Circulation	Restore overdues on lost item return	If true when a lost item is checked in overdue fines are charged (up to the maximum fines amount)	True/False	
Circulation	Suppress popup-dialogs during check-in.	When set to True, no pop-up window for exceptions on check-in. But the accompanying sound will be played.	True/False	
Circulation	Target copies for a hold even if copy's circ lib is closed	If this setting is true at a given org unit or one of its ancestors, the hold targeter will target copies from this org unit even if the org unit is closed (according to the actor.org_unit.closed_date table).	True/False	
Circulation	Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib	If this setting is true at a given org unit or one of its ancestors, the hold targeter will target copies from this org unit even if the org unit is closed (according to the actor.org_unit.closed_date table) IF AND ONLY IF the copy's circ lib is the same as the hold's pickup lib.	True/False	
Circulation	Truncate fines to max fine amount		True/False	Default : True
Circulation	Use Lost and Paid copy status	Use Lost and Paid copy status when lost or long overdue billing is paid	True/False	
Circulation	Warn when patron account is about to expire	If set, the staff client displays a warning this number of days before the expiry of a patron account. Value is in number of days.	Duration	
Circulation	Void lost item billing when returned	If true,when a lost item is checked in the item replacement bill (item price) is voided. If the patron has already paid the bill a credit is applied.	True/False	
Circulation	Void lost max interval	tems that have been checked out this long will not result in voided billings when returned. Only applies if Circ: Void lost item billing or Circ: Void processing fee on lost item are true.	Duration	Should be less than 1 year
Circulation	Void processing fee on lost item return	If true the processing fee is voided when a lost item is returned	True/False	
Finances	Charge item price when marked damaged	If true Evergreen bills item price to the last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	True/False	

Finances	Charge lost on zero	If set to True, default item price will be charged when an item is marked lost even though the price in item record is 0.00 (same as no price). If False, only processing fee, if used, will be charged.	True/False	
Finances	Charge processing fee for damaged items	Optional processing fee billed to last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	Number (Dollars)	
Finances	Maximum Item Price	When charging for lost items, limit the charge to this as a maximum.	Value	
Finances	Minimum Item Price	When charging for lost items, charge this amount as a minimum.	Value	
Finances	Disable Patron Credit	Do not allow patrons to accrue credit or pay fines/fees with accrued credit	True/False	
Finances	Default item price	Replacement charge for lost items if price is unset in the Copy Editor. . Does not apply if item price is set to $0	Number (Dollars)	
Finances	Lost materials processing fee	The amount charged in addition to item price when an item is marked lost.	Number (Dollars)	
Finances	Void overdue fines when items are marked lost	If true overdue fines are voided when an item is marked lost	True/False	
Graphic User Interface	Alert on empty bib records	Alert staff when the last copy for a record is being deleted.	True/False	
Graphic User Interface	Button bar	If TRUE, the staff client button bar appears by default on all workstations registered to your library; staff can override this setting at each login.	True/False	
Graphic User Interface	Cap results in Patron Search at this number.	The maximum number of resutls returned per search. If 100 is set up here, any search will return 100 records at most.	Number	
Graphic User Interface	Default Country for New Addresses in Patron Editor	This is the default Country for new addresses in the patron editor.	Text	Default : Canada
Graphic User Interface	Default hotkeyset	Default Hotkeyset for clients (filename without the .keyset). Examples: Default, Minimal, and None	Text	
Graphic User Interface	Default ident type for patron registration	This is the default Ident Type for new users in the patron editor.	Selection List	
Graphic User Interface	Default showing suggested patron registration fields	Instead of All fields, show just suggested fields in patron registration by default.	True/False	

Graphic User Interface	Disable the ability to save list column configurations locally.	GUI: Disable the ability to save list column configurations locally. If set, columns may still be manipulated, however, the changes do not persist. Also, existing local configurations are ignored if this setting is true.	True/False	
Graphic User Interface	Example for Day_phone field on patron registration	The example on validation on the Day_phone field in patron registration.	Text	
Graphic User Interface	Example for Email field on patron registration	The example on validation on the Email field in patron registration.	Text	
Graphic User Interface	Example for Evening-phone on patron registration	The example on validation on the Evening-phone field in patron registration.	Text	
Graphic User Interface	Example for Other-phone on patron registration	The example on validation on the Other-phone field in patron registration.	Text	
Graphic User Interface	Example for phone fields on patron registration	The example on validation on phone fields in patron registration. Applies to all phone fields without their own setting.	Text	
Graphic User Interface	Example for Postal Code field on patron registration	The example on validation on the Postal Code field in patron registration.	Text	
Graphic User Interface	Format Dates with this pattern.	Format Dates with this pattern (examples: "yyyy-MM-dd" for "2010-04-26", "MMM d, yyyy" for "Apr 26, 2010"). Formats are effective in display (not editing) area.	Text	Default : yyyy-mm-dd
Graphic User Interface	Format Times with this pattern.	Format Times with this pattern (examples: "h:m:s.SSS a z" for "2:07:20.666 PM Eastern Daylight Time", "HH:mm" for "14:07"). Formats are effective in display (not editing) area.	Text	
Graphic User Interface	GUI: Hide these fields within the Item Attribute Editor.		Text	
Graphic User Interface	Horizontal layout for Volume/Copy Creator/Editor.	The main entry point for this interface is in Holdings Maintenance, Actions for Selected Rows, Edit Item Attributes / Call Numbers / Replace Barcodes. This setting changes the top and bottom panes (if FALSE) for that interface into left and right panes (if TRUE).	True/False	
Graphic User Interface	Idle timeout	If you want staff client windows to be minimized after a certain amount of system idle time, set this to the number of seconds of idle time that you want to allow before minimizing (requires staff client restart).	Number	
Graphic User Interface	Max user activity entries to retrieve (staff client)	Sets the maximum number of recent user activity entries to retrieve for display in the staff client.	Number	

Graphic User Interface	Maximum previous checkouts displayed	The maximum number of previous circulations the staff client will display when investigating item details	Number	Default : 4
Graphic User Interface	Patron circulation summary is horizontal		True/False	Default : False
Graphic User Interface	Record in-house use: # of uses threshold for Are You Sure? dialog	In the Record In-House Use interface, a submission attempt will warn if the # of uses field exceeds the value of this setting.	Number	
Graphic User Interface	Record In-House Use: Maximum # of uses allowed per entry.	The # of uses entry in the Record In-House Use interface may not exceed the value of this setting.	Number	
Graphic User Interface	Require at least one address for Patron Registration	Enforces a requirement for having at least one address for a patron during registration. If set to False, you need to delete the empty address before saving the record. If set to True, deletion is not allowed.	True/False	
Graphic User Interface	Require XXXXX field on patron registration	The XXXXX field will be required on the patron registration screen.	True/False	
Graphic User Interface	Require staff initials for entry/edit of item/patron/penalty notes/messages.	Appends staff initials and edit date into note content.	True/False	Default : True
Graphic User Interface	Show billing tab first when bills are present	If true accounts for patrons with bills will open to the billing tab instead of check out	True/False	Default : False
Graphic User Interface	Show XXXXX field on patron registration	The XXXXX field will be shown on the patron registration screen. Showing a field makes it appear with required fields even when not required. If the field is required this setting is ignored.	True/False	
Graphic User Interface	Suggest XXXXX field on patron registration	The XXXXX field will be suggested on the patron registration screen. Suggesting a field makes it appear when suggested fields are shown. If the field is shown or required this setting is ignored.	True/False	
Graphic User Interface	Toggle off the patron summary sidebar after first view.	When true, the patron summary sidebar will collapse after a new patron sub-interface is selected.	True/False	
Graphic User Interface	URL for remote directory containing list column settings.	The format and naming convention for the files found in this directory match those in the local settings directory for a given workstation. An administrator could create the desired settings locally and then copy all the tree_columns_for_* files to the remote directory.	Text	
Graphic User Interface	Uncheck bills by default in the patron billing interface	Uncheck bills by default in the patron billing interface, and focus on the Uncheck All button instead of the Payment Received field.	True/False	

Graphic User Interface	Unified Volume/Item Creator/Editor	If True, combines the Volume/Copy Creator and Item Attribute Editor in some instances.	True/False	
Graphic User Interface	Work Log: maximum actions logged	Maximum entries for "Most Recent Staff Actions" section of the Work Log interface.	Number	
Graphic User Interface	Work Log: maximum patrons logged	Maximum entries for "Most Recently Affected Patrons..." section of the Work Log interface.	Number	
Holds	Behind desk pickup supported	If a branch supports both a public holds shelf and behind-the-desk pickups, set this value to true. This gives the patron the option to enable behind-the-desk pickups for their holds by selecting Hold is behind Circ Desk flag in patron record.	True/False	
Holds	Cancelled holds display age	Show all cancelled holds that were cancelled within this amount of time	Duration	
Holds	Cancelled holds display count	How many cancelled holds to show in patron holds interfaces	Number	
Holds	Default hold shelf expire interval	Hold Shelf Expiry Time is calculated and inserted into hold record based on this interval when capturing a hold.	Duration	
Holds	Expire interval	Amount of time until an unfulfilled hold expires	Duration	Default : 180 days
Holds	Has local copy alert	If there is an available copy at the requesting library that could fulfill a hold during hold placement time, alert the patron.	True/False	
Holds	Has local copy block	If there is an available copy at the requesting library that could fulfill a hold during hold placement time, do not allow the hold to be placed.	True/False	
Holds	Reset request time on un-cancel	When a hold is uncancelled, reset the request time to push it to the end of the queue	True/False	
Holds	Use Active Date for age protection	When calculating age protection rules use the Active date instead of the Creation Date.	True/False	Default : True
Library	Change reshelving status interval	Amount of time to wait before changing an item from "Reshelving" status to "available"	Duration	The default is at midnight each night for items with "Reshelving" status for over 24 hours.
Library	Claim never checked out: mark copy as missing	When a circ is marked as claims-never-checked-out, mark the copy as missing	True/False	Default : True
Library	Juvenile age threshold	Upper cut-off age for patrons to be considered juvenile, calculated from date of birth in patron accounts	Duration (Years)	
Library	Mark item damaged voids overdues	When an item is marked damaged, overdue fines on the most recent circulation are voided.	True/False	

OPAC	Allow pending addresses	If true patrons can edit their addresses in the OPAC. Changes must be approved by staff	True/False	Default : False
OPAC	Jump to details on 1 hit (OPAC)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the public OPAC	True/False	
OPAC	Jump to details on 1 hit (staff client)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the PAC within the staff client	True/False	
OPAC	Number of staff client saved searches to display on left side of results and record details pages	If unset, the default is 10.	Number	
OPAC	Payment history age limit	The OPAC should not display payments by patrons that are older than any interval defined here.	Duration	
OPAC	Tag Circulated Items in Results	When a user is both logged in and has opted in to circulation history tracking, turning on this setting will cause previous (or currently) circulated items to be highlighted in search results.	True/False	
Offline and Program	Skip offline checkin if newer item Status Changed Time.	Skip offline checkin transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	
Offline and Program	Skip offline checkout if newer item Status Changed Time.	Skip offline checkout transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	
Offline and Program	Skip offline renewal if newer item Status Changed Time.	Skip offline renewal transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	

Offline and Program	Disable automatic print attempt type list	Disable automatic print attempts from staff client interfaces for the receipt types in this list. Possible values: "Checkout", "Bill Pay", "Hold Slip", "Transit Slip", and "Hold/Transit Slip". This is different from the Auto-Print checkbox in the pertinent interfaces in that it disables automatic print attempts altogether, rather than encouraging silent printing by suppressing the print dialog. The Auto-Print checkbox in these interfaces have no effect on the behavior for this setting. In the case of the Hold, Transit, and Hold/Transit slips, this also suppresses the alert dialogs that precede the print dialog (the ones that offer Print and Do Not Print as options).	Text	
Offline and Program	Sending email address for patron notices	This email address is for automatically generated patron notices (e.g. email overdues, email holds notification). It is good practice to set up a generic account, like info@nameofyourlibrary.ca, so that one person's individual email inbox doesn't get cluttered with emails that were not delivered.	Text	THIS IS REQUIRED – YOU MUST ENTER AN EMAIL ADDRESS IN THIS FIELD TO ENSURE YOUR PATRON EMAIL NOTIFICATIONS ARE SENT PROPERLY.
Receipt Templates and SMS Text Message	Content of alert_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(alert_text)%	Text	
Receipt Templates and SMS Text Message	Content of event_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(event_text)%	Text	
Receipt Templates and SMS Text Message	Content of footer_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(footer_text)%	Text	
Receipt Templates and SMS Text Message	Content of header_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(header_text)%	Text	
Receipt Templates and SMS Text Message	Content of notice_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(notice_text)%	Text	

Receipt Templates and SMS Text Message	Disable auth requirement for texting call numbers.	Disable authentication requirement for sending call number information via SMS from the OPAC.	True/False	Default : True
Receipt Templates and SMS Text Message	Enable features that send SMS text messages.	Current features that use SMS include hold-ready-for-pickup notifications and a "Send Text" action for call numbers in the OPAC. If this setting is not enabled, the SMS options will not be offered to the user. Unless you are carefully silo-ing patrons and their use of the OPAC, the context org for this setting should be the top org in the org hierarchy, otherwise patrons can trample their user settings when jumping between orgs.	True/False	Default : True
Security	Default level of patrons' internet access	Enter numbers 1 (Filtered), 2 (Unfiltered), or 3 (No Acess)	Number	
Security	OPAC Inactivity Timeout (in seconds)	Number of seconds of inactivity before OPAC accounts are automatically logged out. Sitka default is 420 seconds (7 minutes)	Number	
Security	Obscure the Date of Birth field	When true, the Date of Birth column in patron lists will default to Not Visible, and in the Patron Summary sidebar the value will display as unless the field label is clicked.	True/False	
Security	Offline: Patron usernames allowed	During offline circulations, allow patrons to identify themselves with usernames in addition to barcode. For this setting to work, a barcode format must also be defined	True/False	
Security	Patron: password from phone #	If true the last 4 digits of the patron's phone number is the password for new accounts (password must still be changed at first OPAC login)	True/False	Only for new Accounts – reset existing password generates random code
Security	Audio Alerts	Use audio alerts for selfcheck events.	True/False	
Self Check and Others	Block copy checkout status	List of copy status IDs that will block checkout even if the generic COPY_NOT_AVAILABLE event is overridden.	Number	
Self Check and Others	Patron login timeout (in seconds)	Number of seconds of inactivity before the patron is logged out of the selfcheck interface.	Duration	
Self Check and Others	Pop-up alert for errors	If true, checkout/renewal errors will cause a pop-up window in addition to the on-screen message.	True/False	
Self Check and Others	Require patron password	If true, patrons will be required to enter their password in addition to their username/barcode to log into the selfcheck interface.	True/False	

Self Check and Others	Selfcheck override events list	List of checkout/renewal events that the selfcheck interface should automatically override instead instead of alerting and stopping the transaction.	Text	
Self Check and Others	Workstation Required	All selfcheck stations must use a workstation.	True/False	
Self Check and Others	Circ: Default precat circ modifier		Selection List	
Self Check and Others	Limit Due Date by Patron Expiry	If True automatically adjusts item due date to match patron card expiry date if expiry date sooner than due date. If False item due date applied.	True/False	
Self Check and Others	Recalls: An array of fine amount, fine interval, and maximum fine.	An array of fine amount, fine interval, and maximum fine. For example, to specify a new fine rule of $5.00 per day, with a maximum fine of $50.00, use: [5.00,"1 day",50.00]	Text	
Self Check and Others	Recalls: Circulation duration that triggers a recall.	A hold placed on an item with a circulation duration longer than this will trigger a recall. For example, "14 days" or "3 weeks".	Duration	
Self Check and Others				
Self Check and Others	Recalls: Truncated loan period.	When a recall is triggered, this defines the adjusted loan period for the item. For example, "4 days" or "1 week".	Duration	
Data Type	**Formatting**			
True/False	Select value from drop-down menu			
Number	Enter a numerical value (decimals allowed in price settings)			
Duration	Enter a number followed by a space and any of the following unites: minutes, hours, days, months (30 minutes, 2 days, etc.)			
Selection List	Choose from a drop-down list of options			
Text	Free text			