

label	description	Recommendations / Comments	Acceptable Values	Counts in Cardinal as of January 2022 (value then count)	NC Cardinal
Allow Patron Self-Registration	Allow patrons to self-register, creating pending user accounts. Default setting for Cardinal is True.	Example form: https://haywood.nccardinal.org/eg/opac/register	True/False	False (12)True (5)	TRUE
Patron Self-Reg. Display Timeout	Number of seconds to wait before reloading the patron self-registration interface to clear sensitive data	Cardinal-wide value	number		1500 seconds
Patron Self-Reg. Expire Interval	If set, this is the amount of time a pending user account will be allowed to sit in the database. After this time, the pending user information will be purged	Cardinal-wide value	interval of time: # of hours or days		7 days
Deprecated: Format Dates with this pattern.	GUI: Format Dates with this pattern (examples: "yyyy-MM-dd" for "2010-04-26", "MMM d, yyyy" for "Apr 26, 2010")	Cardinal-wide value	text		MM/dd/yyyy
Require dob field on patron registration	The dob field will be required on the patron registration screen.	Cardinal-wide value	True/False		TRUE
Juvenile Age Threshold	The age at which a user is no long considered a juvenile. For example, "18 years".	All systems should have a value.	interval of time: # of hours or days	18 years (33)17 years (3)	
Show day_phone field on patron registration	The day_phone 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.	Cardinal-wide value	True/False		TRUE
Require day_phone field on patron registration	The day_phone field will be required on the patron registration screen.	Requires staff to enter a value for the daytime phone number before they can save the patron registration or account update	True/False	True (23)False (3)	
Default Ident Type for Patron Registration	This is the default Ident Type for new users in the patron editor.	Consortium has a default value of Driver's License, but you can choose something different if you wish. (Do not record Social Security Number in Evergreen; all SSNs should be stripped out of your ILS data before migration into NC Cardinal)	Driver's License: value 1 Other: value 3	1 (14)3 (3)	1
Require at least one address for Patron Registration	Enforces a requirement for having at least one address for a patron during registration.	Cardinal-wide value	True/False	True (7)False (1)	TRUE
Allow pending addresses	If enabled, patrons can create and edit existing addresses. Addresses are kept in a pending state until staff approves the changes	True is recommended. If True, patrons may update address in their account in the My Account section of the OPAC, so staff are aware of the new address when patrons are at the desk	True/False	True (25)False (18)	
Invalid patron address penalty	When set, if a patron address is set to invalid, a penalty is applied.	True is recommended to block patron from being able to checkout, renew, etc., if they have an invalid address.	True/False	True (31)False (3)	
Default level of patrons' internet access		This is a value that can be used outside Evergreen to control internet access if you're using software to provide wi-fi or computer access.	Filtered: value 1 Unfiltered: value 2	1 (12)2 (13)	2
Patron: password from phone #	By default, use the last 4 alphanumeric characters of the patrons phone number as the default password when creating new users. The exact characters used may be configured via the "GUI: Regex for day_phone field on patron registration" setting.	The two most common options are the last 4 numbers of your phone number, or the last four digits of the patron barcode	True/False	True (35)False (9)	
Warn when patron account is about to expire	Warn when patron account is about to expire. If set, the staff client displays a warning this many days before the expiry of a patron account. Value is in number of days, for example: 3 for 3 days.	All systems should have a value.	number (of days)	30 (3)21 (8)60 (5)7 (4)2	30

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.	Cardinal default value is True but patrons still have to opt in to receive text notifications	True/False		TRUE
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.	This has to be set for the other Auto-Extend options to function	True/False	True (21)False (7)	
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".	For more informative explanation, please consult the Fines and Grace Days page in the Administrative Manual	True/False	True (23)False (6)	
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.	This setting is the most forgiving of the grace period options. See the Fines and Grace Days page in the Administrative Manual (link in row above)	True/False	True (19)False (6)	
Number of Retrievable Recent Patrons	Number of most recently accessed patrons that can be re-retrieved in the staff client. A value of 0 or less disables the feature. Defaults to 1.	Sets the number of recently served patrons that a staff member can look up at their workstation.	number	10 (3)20 (2)2 (1)6 (1)	10
Maximum previous checkouts displayed	This is the maximum number of previous circulations the staff client will display when investigating item details	Sets the number of recent borrowers that show up when looking who recently checked out a specified item	number	10 (12)5 (9)3 (8)2 (6)6 (1)	10
Require staff initials for entry/edit of patron notes.	Appends staff initials and edit date into patron note content.	Default setting of True. Patron notes are found under the "Other" tab found on the patron view menu	True/False		TRUE
Require staff initials for entry/edit of patron standing penalties and messages.	Appends staff initials and edit date into patron standing penalties and messages.	Default setting of True. Patron messages are found in the patron edit screen.	True/False		TRUE
Max Patron Claims Returned Count	When this count is exceeded, a staff override is required to mark the item as claims returned	A limit to how many items can be marked as Claims Returned before an override is required. Recommendation of "10"	number	3 (18)5 (10)2 (6)10 (4)8 (1)	
Claim Never Checked Out: Mark copy as missing	When a circ is marked as claims-never-checked-out, mark the copy as missing	Most libraries choose True	True/False	True (22)	
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.	Most systems do not use missing pieces. When used, the most common settings are: Missing (#4) Damaged (#14) Repair (#106)	number (see note)	14 (13)4 (10)0 (1)106 (1)	
Change reshelving status interval	Amount of time to wait before changing an item from "reshelving" status to "available". Examples: "1 day", "6 hours"	To consider: How long do your items typically stay on the cart waiting to be reshelved?	interval of time: # of hours or days	2 hours (6)24 hours (4)1 (1)	1 hour
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	True (21)	TRUE
Warn patrons when adding to a temporary book list	Present a warning dialog to the patron when a patron adds a book to a temporary book list.	Patrons can opt out.	True/False	True (20)	TRUE

Library information URL (such as "http://example.com/about.html")	URL for information on this library, such as contact information, hours of operation, and directions. If set, the library name in the copy details section links to that URL. Use a complete URL, such as "http://example.com/hours.html".		(your website address)		
Use external "library information URL" in copy table, if available	If set to true, the library name in the copy details section will link to the URL associated with the "Library information URL" library setting rather than the library information page generated by Evergreen.		True/False	True (6)	
Content of event_text include	Text to be inserted into Print Templates in place of {{includes.event_text}}			Check out this event! (2)	
Content of footer_text include	Text to be inserted into Print Templates in place of {{includes.footer_text}}			Main Library Hours: Mon - Thurs 9:00 - 7:00, Sat 9:00 - 5:00 (1)	