

label	description	Recommendations / Comments	Acceptable Values	Counts in Cardinal as of January 2022 (value then count)	NC Cardinal
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	This setting should be avoided.			
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.	This setting should be avoided.		true13	
Claim Return: Mark copy as missing	When a circ is marked as claims-returned, also mark the copy as missing	This setting should be avoided. If chosen, True is the recommended value.		true6	
Clear hold when other patron checks out item	Default to cancel the hold when patron A checks out item on hold for patron B.	This setting should be avoided.			
Display copy alert for in-house-use	Display copy alert for in-house-use	This setting should be avoided.			
Forgive fines when checking out a lost item and copy alert is suppressed?	Controls whether fines are automatically forgiven when checking out an item that has been marked as lost, and the corresponding copy alert has been suppressed.	This setting should be avoided.			
Load patron from Checkout	When scanning barcodes into Checkout auto-detect if a new patron barcode is scanned and auto-load the new patron.	This setting should be avoided and is no longer relevant.		true1	
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.	This setting should be avoided as it does not currently work.			
Minimum Transit Checkin Interval	In-Transit items checked in this close to the transit start time will be prevented from checking in	This setting should be avoided.			
Patron Merge Address Delete	Delete address(es) of subordinate user(s) in a patron merge	This setting should be avoided.		true2 false1	
Permission groups exempt from item deposit fees	List of the numeric IDs of permission groups who should not be charged item deposit fees. Example: [3]	This setting should be avoided.			
Permission groups exempt from item rental fees	List of the numeric IDs of permission groups who should not be charged item rental fees. Example: [3]	Similar to the deposit fees setting. Most libraries do not use.			
Printing: Custom Javascript File	Full URL path to a Javascript File to be loaded when printing. Should implement a print_custom function for DOM manipulation. Can change the value of the do_print variable to false to cancel printing.	Most libraries do not use.			
Suppress popup-dialogs during check-in.	Circ: Suppress popup-dialogs during check-in.	This setting should be avoided.		false5	

Truncate fines to max fine amount		This setting is covered by your circulation policies, and there is no need to set here.		true	
Workstation OU fallback for staff-placed holds	For staff-placed holds, in the absence of a patron preferred pickup location, fall back to using the staff workstation OU (rather than patron home OU)	This setting should be avoided.			
Claim Return Copy Status	Claims returned copies are put into this status. Default is to leave the copy in the Checked Out status	This setting should be avoided; claims returned copies should already be in checked out status.		100 40 40	
Library time zone	Define the time zone in which a library physically resides. Examples: America/Toronto, America/Chicago, America/Los_Angeles, America/Vancouver, Europe/Prague. See Wikipedia for a complete list (Note: Only use "canonical" timezones).	Evergreen has a default setting, no need to set this one.			
Pre-cat Item Circ Lib	Override the default circ lib of "here" with a pre-configured circ lib for pre-cat items. The value should be the "shortname" (aka policy name) of the org unit	This setting should be avoided.			
Telephony: Arbitrary line(s) to include in each notice callfile	This overrides lines from opensrf.xml. Line(s) must be valid for your target server and platform (e.g. Asterisk 1.4).	This setting should be avoided.			
Block copy checkout status	List of copy status IDs that will block checkout even if the generic COPY_NOT_AVAILABLE event is overridden	This setting is not currently used.			
Selfcheck override events list	List of checkout/renewal events that the selfcheck interface should automatically override instead of alerting and stopping the transaction				
Best-hold selection sort order	Defines the sort order of holds when selecting a hold to fill using a given copy at capture time	This setting is currently being reviewed by the Cardinal team.			
Clear shelf copy status	Any copies that have not been put into reshelving, in-transit, or on-holds-shelf (for a new hold) during the clear shelf process will be put into this status. This is basically a purgatory status for copies waiting to be pulled from the shelf and processed by hand	Evergreen has a default setting, invalid for choosing individually.		703 80 00	
Default Estimated Wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the default estimated length of time to assume an item will be checked out. Examples: "3 weeks", "7 days"	This setting should be avoided.			
FIFO	Force holds to a more strict First-In, First-Out capture	False is the Cardinal setting.		false	FALSE
Hard boundary		This setting is decided by the Resource Sharing agreement. Migrating libraries have a setting to avoid resource sharing, otherwise value in this case should be 1.		020 null 20 10	0

Hard stalling interval		This setting is currently being reviewed by the Cardinal team.			
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	This setting should be avoided. If it is chosen, True should be used.		true ²	
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	This setting should be avoided.			
Max foreign-circulation time	Time a copy can spend circulating away from its circ lib before returning there to fill a hold (if one exists there)	This setting should be avoided.		6 months ¹	6 months
Maximum library target attempts	When this value is set and greater than 0, the system will only attempt to find a copy at each possible branch the configured number of times	This setting is currently being reviewed by the Cardinal team.		5 ¹	
Maximum number of duplicate holds allowed.	Maximum number of duplicate title or metarecord holds allowed per patron.	This setting should be avoided. (newly possible and unresearched)		10 ²	
Minimum Estimated Wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the minimum estimated length of time to assume an item will be checked out. Examples: "1 week", "5 days"	This setting should be avoided.			
Org Unit Target Weight	Org Units can be organized into hold target groups based on a weight. Potential copies from org units with the same weight are chosen at random.	This setting is currently being reviewed by the Cardinal team.			
Skip For Hold Targeting	When true, don't target any copies at this org unit for holds	This setting is decided by the Resource Sharing agreement.		false ⁴ true ¹⁷	
Soft boundary		This setting is currently being reviewed by the Cardinal team.		0 ²	0
Soft stalling interval	How long to wait before allowing remote items to be opportunistically captured for a hold. Example "5 days"	This setting is currently being reviewed by the Cardinal team.		7 days ¹	7 days
Use weight-based hold targeting	Use library weight based hold targeting	This setting is currently being reviewed by the Cardinal team.			
Maximum Item Price	When charging for lost items, limit the charge to this as a maximum.	This setting is not currently used.			
Minimum Item Price	When charging for lost items, charge this amount as a minimum.	This setting is not currently used.			
Default copy status (fast add)	Default status when a copy is created using the "Fast Add" interface.	This setting should be avoided.		5 ²⁰ 0 ¹	5
Default Merge Profile (Z39.50 and Record Buckets)	Default merge profile to use during Z39.50 imports and record bucket merges	This setting should be avoided.			
Defines the control number identifier used in 003 and 035 fields.	Cat: Defines the control number identifier used in 003 and 035 fields.	This setting should be avoided.		CARDINAL ⁵	CARDINAL

Delete bib if all copies are deleted via Acquisitions lineitem cancellation.	CAT: Delete bib if all copies are deleted via Acquisitions lineitem cancellation.	We do not recommend choosing a setting. This may be related to a known bug in Cardinal. If chosen, True is the most commonly chosen option.		true ⁹	
Maximum Parallel Z39.50 Batch Searches	The maximum number of Z39.50 searches that can be in-flight at any given time when performing batch Z39.50 searches	This setting is not currently used.			
Maximum Z39.50 Batch Search Results	The maximum number of search results to retrieve and queue for each record + Z39 source during batch Z39.50 searches	This setting is not currently used.			
Custom CSS for the OPAC	Custom CSS for the OPAC	This setting is not currently used.			
Enable Digital Bookplate Search	If enabled, adds a "Digital Bookplate" option to the query type selectors in the public catalog for search on copy tags.	We do not recommend using this setting. If you choose to, most libraries choose True.		true ⁴	
OPAC: Number of staff client saved searches to display on left side of results and record details pages	If unset, the OPAC (only when wrapped in the staff client!) will default to showing you your ten most recent searches on the left side of the results and record details pages. If you actually don't want to see this feature at all, set this value to zero at the top of your organizational tree.	Cardinal level decision			
OPAC: Org Unit is not a hold pickup library	If set, this org unit will not be offered to the patron as an option for a hold pickup location. This setting has no affect on searching or hold targeting	Cardinal level decision		false ¹⁸ true ¹⁵	
Org Unit Hiding Depth	This will hide certain org units in the public OPAC if the Physical Location (url param "physical_loc") for the OPAC inherits this setting. This setting specifies an org unit depth, that together with the OPAC Physical Location determines which section of the Org Hierarchy should be visible in the OPAC. For example, a stock Evergreen installation will have a 3-tier hierarchy (Consortium/System/Branch), where System has a depth of 1 and Branch has a depth of 2. If this setting contains a depth of 1 in such an installation, then every library in the System in which the Physical Location belongs will be visible, and everything else will be hidden. A depth of 0 will effectively make every org visible. The embedded OPAC in the staff client ignores this setting.	This setting is not currently used.		null ¹	
Show Owning Lib in Items Out	If enabled, the Owning Lib will be shown in the Items Out display. This may assist in requesting additional renewals	This setting is not currently used.			
Content of alert_text include	Text to be inserted into Print Templates in place of {{includes.alert_text}}	This setting is not currently used.			
Content of header_text include	Text to be inserted into Print Templates in place of {{includes.header_text}}	This setting is not currently used.			
Content of notice_text include	Text to be inserted into Print Templates in place of {{includes.notice_text}}	This setting is not currently used.			

booking.allow_email_notify	Permit email notification when a reservation is ready for pickup.	Not applicable. Patrons cannot currently use the booking module.			
Initial status for received items	Allows staff to designate a custom copy status on received lineitems. Default status is "In Process".	Evergreen decides the initial status automatically - this setting should be avoided.		52	
Set copy creator as receiver	When receiving a copy in acquisitions, set the copy "creator" to be the staff that received the copy	This setting should be avoided.		true3 false3	
Upload Activate PO	Activate the purchase order by default during ACQ file upload	This should not be set. This should be decided on a secondary basis.		false3 true1	
Upload Create PO	Create a purchase order by default during ACQ file upload	Evergreen completes this operation automatically - this setting is outdated.		true7 false1	
Upload Default Insufficient Quality Fall-Thru Profile	Default low-quality fall through profile used during ACQ file upload	This setting should be avoided.			
Upload Default Merge Profile	Default merge profile to use during ACQ file upload	"Match only merge" is set for Cardinal.		1261	
Upload Default Min. Quality Ratio	Default minimum quality ratio used during ACQ file upload	This setting should be avoided.			
Upload Default Provider	Default provider to use during ACQ file upload	Most libraries have several providers, so we do not recommend setting a default.		4931	
Upload Import Non Matching by Default	Import non-matching records by default during ACQ file upload	This should not be set. This should be decided on an import case by case basis.		true4	
Upload Load Items for Imported Records by Default	Load items for imported records by default during ACQ file upload	This should not be set. This should be decided on an import case by case basis.		false3 true3	
Upload Merge on Best Match by Default	Merge records on best match by default during ACQ file upload	This setting should be avoided.		true4	
Upload Merge on Exact Match by Default	Merge records on exact match by default during ACQ file upload	This setting should be avoided.			
Upload Merge on Single Match by Default	Merge records on single match by default during ACQ file upload	This setting should be avoided.		true1	
Default display grouping for serials distributions presented in the OPAC.	Default display grouping for serials distributions presented in the OPAC. This can be "enum" or "chron".	This setting is not currently used.		chron3 enum1	

Previous Issuance Copy Location	When a serial issuance is received, copies (units) of the previous issuance will be automatically moved into the configured shelving location	This setting is not currently used.		3984 2540 3174	
Allow multiple username changes	If enabled (and Lock Usernames is not set) patrons will be allowed to change their username when it does not look like a barcode. Otherwise username changing in the OPAC will only be allowed when the patron's username looks like a barcode.	This may incur a security issue if chosen.		true	
Password format	Regular expression defining the password format. Note: Be sure to update the update_password_msg.tt2 TPAC template with a user-friendly description of your password strength requirements.	This may incur a security issue if chosen.		^{4,}\$	^{4,}\$
Global Default Locale		This setting is not currently used.			
Lock Usernames	If enabled username changing via the OPAC will be disabled	This setting is not currently used.			
Patron barcode format	Regular expression defining the patron barcode format	This may incur a security issue if chosen.			
Patron username format	Regular expression defining the patron username format, used for patron registration and self-service username changing only	This may incur a security issue if chosen.			
Maximum concurrently active self-serve password reset requests	Prevent the creation of new self-serve password reset requests until the number of active requests drops back below this number.	This may incur a security issue if chosen.		300	
Maximum concurrently active self-serve password reset requests per user	When a user has more than this number of concurrently active self-serve password reset requests for their account, prevent the user from creating any new self-serve password reset requests until the number of active requests for the user drops back below this number.	This may incur a security issue if chosen.		10	
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 <Hidden> unless the field label is clicked.	This may incur a security issue if chosen.		false	
Patron Opt-In Boundary	This determines at which depth above which patrons must be opted in, and below which patrons will be assumed to be opted in.	This setting is not currently used.			
Patron Opt-In Default	This is the default depth at which a patron is opted in; it is calculated as an org unit relative to the current workstation.	This setting is not currently used.			
Persistent Login Duration	How long a persistent login lasts. E.g. '2 weeks'	This setting is not currently used.			
Restrict patron opt-in to home library and related orgs at specified depth	Patrons at this library can only be opted-in at org units which are within the library's section of the org tree, at or below the depth specified by this setting. They cannot be opted in at any other libraries.	This setting is not currently used.			
Self-serve password reset request time-to-live	Length of time (in seconds) a self-serve password reset request should remain active.	This may incur a security issue if the time interval is too large.		3600	
Cap results in Patron Search at this number.	So for example, if you search for John Doe, normally you would get at most 50 results. This setting allows you to raise or lower that limit.	This setting is not currently used.		50 100	

Default Hotkeyset	Default Hotkeyset for clients (filename without the .keyset). Examples: Default, Minimal, and None	This setting is not currently used.			
Deprecated: Format Times with this pattern.	GUI: 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")	This setting is not currently used.		HH:mm	
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.	This setting is not currently used.		false	
Example dob field on patron registration	The Example for validation on the dob field in patron registration.	This setting is not currently used.			
Example for email field on patron registration	The Example for validation on the email field in patron registration.	This setting is not currently used.			
Example for evening_phone field on patron registration	The Example for validation on the evening_phone field in patron registration.	This setting is not currently used.			
Example for other_phone field on patron registration	The Example for validation on the other_phone field in patron registration.	This setting is not currently used.			
Example for phone fields on patron registration	The Example for validation on phone fields in patron registration. Applies to all phone fields without their own setting.	This setting is not currently used.		null	
Example for post_code field on patron registration	The Example for validation on the post_code field in patron registration.	This setting is not currently used.			
GUI: Enable Experimental Angular Staff Catalog	Display an entry point in the browser client for the experimental Angular staff catalog.	This setting is not currently used.			
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 for that interface into left and right panes.	This setting is not currently used.			
Items Out Claims Returned display setting	Value is a numeric code, describing: A. In which tab ("Items Checked Out", or "Other/Special Circulations") the circulation should appear while checked out, and B. Whether the circulation should continue to appear in the "Other" tab when checked in with outstanding fines. 1 = (A) "Items", (B) "Other". 2 = (A) "Other", (B) "Other". 5 = (A) "Items", (B) do not display. 6 = (A) "Other", (B) do not display.	This setting is not currently used.		219	
Items Out Long-Overdue display setting	Value is a numeric code, describing: A. In which tab ("Items Checked Out", or "Other/Special Circulations") the circulation should appear while checked out, and B. Whether the circulation should continue to appear in the "Other" tab when checked in with outstanding fines. 1 = (A) "Items", (B) "Other". 2 = (A) "Other", (B) "Other". 5 = (A) "Items", (B) do not display. 6 = (A) "Other", (B) do not display.	This setting is not currently used.		23	

Items Out Lost display setting	Value is a numeric code, describing: A. In which tab ("Items Checked Out", or "Other/Special Circulations") the circulation should appear while checked out, and B. Whether the circulation should continue to appear in the "Other" tab when checked in with outstanding fines. 1 = (A) "Items", (B) "Other". 2 = (A) "Other", (B) "Other". 5 = (A) "Items", (B) do not display. 6 = (A) "Other", (B) do not display.	This setting is not currently used.		216 62 51 11	
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. 0 means show none, -1 means show all. Default is 1.	We do not recommend setting a limit on the number of entries.			
Maximum payment amount allowed.	The payment amount in the Patron Bills interface may not exceed the value of this setting.	Most libraries do not currently use this setting.		10001	
Payment amount threshold for Are You Sure? dialog.	In the Patron Bills interface, a payment attempt will warn if the amount exceeds the value of this setting.	This setting is not currently used.			
Suggest active field on patron registration	The active 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.	This setting is not currently used.			
Regex for barcodes on patron registration	The Regular Expression for validation on barcodes in patron registration.	This setting is not currently used.			
Regex for day_phone field on patron registration	The Regular Expression for validation on the day_phone field in patron registration. Note: The first capture group will be used for the "last 4 digits of phone number" feature, if enabled. Ex: "[2-9]\d{2}-\d{3}-\d{4})(\s\d+)?" will ignore the extension on a NANP number.	This setting is not currently used.			
Regex for evening_phone field on patron registration	The Regular Expression for validation on the evening_phone field in patron registration.	This setting is not currently used.			
Regex for other_phone field on patron registration	The Regular Expression for validation on the other_phone field in patron registration.	This setting is not currently used.			
Regex for phone fields on patron registration	The Regular Expression for validation on phone fields in patron registration. Applies to all phone fields without their own setting. NOTE: See description of the day_phone regex for important information about capture groups with it.	This setting is not currently used.			
Regex for post_code field on patron registration	The Regular Expression for validation on the post_code field in patron registration.	This setting is not currently used.			
require ident_value field on patron registration	The ident_value field will be required on the patron registration screen.	This setting is not currently used.			
Require other_phone field on patron registration	The other_phone field will be required on the patron registration screen.	This setting is not currently used.			
Require prefix field on patron registration	The prefix field will be required on the patron registration screen.	This setting is not currently used.			

Show active field on patron registration	The active 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.	This setting is not currently used.			
Show barred field on patron registration	The barred 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.	This setting is not currently used.			
Show master_account field on patron registration	The master_account 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.	This setting is not currently used.			
Show other_phone field on patron registration	The other_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.	This setting is not currently used.			
Show prefix field on patron registration	The prefix 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.	This setting is not currently used.			
Suggest barred field on patron registration	The barred 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.	This setting is not currently used.			
Suggest claims_never_checked_out_count field on patron registration	The claims_never_checked_out_count 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.	This setting is not currently used.			
Suggest claims_returned_count field on patron registration	The claims_returned_count 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.	This setting is not currently used.			
Suggest prefix field on patron registration	The prefix 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.	This setting is not currently used.			
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.	This setting is not currently used.		false ¹² true ¹⁰	
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.	Defunct setting to be applied before Evergreen angular version updates.		true ² false ²	TRUE
Unified Volume/Item Creator/Editor	If true combines the Volume/Copy Creator and Item Attribute Editor in some instances.	No longer applies in our version of Evergreen, as Webby is unified.		true ¹⁸ false ⁹	
URL for remote directory containing list column settings.	GUI: 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.	This setting is not currently used.			

Maximum redirect lookups	For URLs returning 3XX redirects, this is the maximum number of redirects we will follow before giving up.	This setting is not currently used.			
Maximum wait time (in seconds) for a URL to lookup	If we exceed the wait time, the URL is marked as a "timeout" and the system moves on to the next URL	This setting is not currently used.			
Number of seconds to wait between URL test attempts.	Throttling mechanism for batch URL verification runs. Each running process will wait this number of seconds after a URL test before performing the next.	This setting is not currently used.			
Number of URLs to test in parallel	URLs are tested in batches. This number defines the size of each batch and it directly relates to the number of back-end processes performing URL verification.	This setting is not currently used.			
OneClickdigital Base URI	Base URI for OneClickdigital API (defaults to https://api.oneclickdigital.com/v1). Using HTTPS here is strongly encouraged.	OneClick is defunct			
OneClickdigital Basic Token	Basic token for client authentication with OneClickdigital API (supplied by OneClickdigital)	OneClick is defunct			
OneClickdigital Library ID	Identifier assigned to this library by OneClickdigital	OneClick is defunct			
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	True (36) False (5)	
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	True (29) False (6)	