

# Evergreen settings review

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Part 1, 9/23/2014

| Setting Description  | PLS recommendation                 | Notes   | OWWLAC recommendation |
|--|------------------------------------|---|-----------------------|
| Do not allow patrons to accrue credit or pay with credit                       | TRUE                               | System will enforce existing OWWLAC decision  |                       |
| Delete the barcode of the subordinate record when duplicate records are merged | TRUE                               | Removes all traces of the secondary acc't. All patron details are merged into the lead record & are preserved. Prevents acc't access by an old card       |                       |
| Change copy status of claimed returned items to this status                    | Claimed Returned                   | After an item is marked claimed returned, the copy status will change to "claimed returned" AND still remain checked out/included in "special circs" list |                       |
|  | Add "Claimed Returned" copy status |   |                       |
| Items Out > Claims Returned items display                                      | Bottom list; disappear             | In the main Items Out list or the bottom ("special circs") list; disappear when item is checked in even if unpaid fines                                   |                       |
| Items Out > Lost items display   | Bottom list; disappear             | In the main Items Out list or the bottom ("special circs") list; disappear when item is checked in even if unpaid fines                                   |                       |
| Void overdue fines when an item is marked damaged                              |                                    | Damaged items not necessarily billed for replacement  |                       |
| Show Bills tab first when a patron has fines                                   |                                    | If the patron has fines (and no other alerts) when opening the record, it will open to the Bills tab before the checkout tab                              |                       |
| Patron account expires soon warning  | 10 days                            | When a patron account is about to expire a warning displays in the staff client (this is in addition to the 30-day email alert)                           |                       |
| In Bills tab, UNCHECK all bills by default                                     |                                    | In order to pay any bills, all or individual, they will have to be checked.   |                       |

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| Cap Max Fine at item price                                 |  | A max overdue fine will not exceed the item price (currently, max fine is set in circ rules, typically \$5 or \$10.) |  |
| Append staff initials and edit date into copy note         |  |  |  |
| Append staff initials into patron note                     |  |  |  |
| Append staff initials into standing penalties and messages |  |  |  |