Tipasa release notes for My Account, June 2020

Release Date: June 20, 2020

Introduction

This release of the new My Account interface allows you to provide your library users with an enhanced account experience, including:

- Improved accessibility and refreshed interface
- Integrated experience for managing circulation and ILL requests (for WMS libraries)

Many of the enhancements are the direct result of your feedback.

By June 19, please prepare for the June 20 switchover to new My Account by addressing the recommendations related to custom colors, chat link, and retention of closed requests.

Recommended actions

For this release, we recommend that you review the following checklists and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These checklists identify updates that we have determined as significant for most institutions. We encourage you to review all of the items in the release notes to determine whether there are other items that might require additional action or follow up by your institution.

Administrative actions

These items require immediate action or decisions.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
</table>

Sign in to My Account

To familiarize yourself with the new interface, and help ensure your institution doesn't encounter any access issues at switchover, sign in with an admin or user account to:
Check custom colors

Because the custom color mapping has changed, we recommend that you check your library's selection of custom colors and update them as needed.

To do this:

2. Examine the page header/banner, footer, and buttons within the page to ensure colors meet your expectations (e.g., for branding your ILL service or complementing other library pages).
3. To change color selections, go to [OCLC Service Configuration](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/090Tipas...) and navigate to WorldCat Discovery and WorldCat Local > User Interface Options > Branding & Customization.

My Account custom colors are controlled by these two selections:

<table>
<thead>
<tr>
<th>Option</th>
<th>Selection (with example color)</th>
<th>Page elements</th>
<th>Recommendation</th>
</tr>
</thead>
</table>
| Primary color | ![Search and fulfillment buttons](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/090Tipas...) | • Buttons  
• Active tab  
• List header (27% of primary color)  
• Icons | • Use a dark color |
| Secondary color | ![Banner and footer color](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/090Tipas...) | • Banner and footer  
• Navigation bar (27% of secondary color) | • Use a light color |

3. Save Changes.

Notes and Tips

- Based on the color selections, text on the buttons, list header, and navigation bar will be either white or black. To switch the text color from white to black (or black to white), try selecting a somewhat lighter (or darker) color.
- Sort icons will appear as greyed out when there are no items to sort.
Add Chat link to Resources menu

Virtual reference or 'chat' services help your library users connect to reference services wherever they are.

Display of an embedded chat widget is not currently included within the new My Account interface, but we expect to add this capability in a future release. Your configured widget will continue to display in WorldCat Discovery.

To make Chat available to your library users from My Account, you can add a link in the Resources menu (formerly Library Links).

To do this:

1. Go to [OCLC Service Configuration](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/090Tipasa) and navigate to WorldCat Discovery and WorldCat Local > User Interface Options > Custom Links.
   **Note:** If the Chat widget is already set up as Custom link 1, and you would like the Chat function to continue to display within WorldCat Discovery, do not make any changes to Custom link 1.

2. Add a new Custom link for your Chat service with:
   - Link type: **other**
   - URL: `<URL for your virtual reference service>`
   - Display text: `<descriptive text>`

3. Save Changes.

Alert users about retention of closed requests

Within the new My Account interface, users will have access to closed requests back to August 2018 (or a shorter amount of time, depending on your Tipasa go-live date and your library's setting for [Patron Data Retention](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/090Tipasa)).

If you have library users that may rely on ILL request information prior to August 2018, we recommend you advise them to print or otherwise save their records from the user portal **no later than June 19**.

After June 20, you can still use the Tipasa staff interface to retrieve requests up to 5 years old by searching keyword, author, or Request ID. However, requests dated before August 2018 (or your shorter retention period) are not linked to the user and are not retrievable with patron name, ID, or department.


Update materials for users and staff

Although library users will be redirected automatically to the new My Account interface, we recommend that you
review and update any information (e.g., web pages, screenshots, videos) that you provide about profiles or accounts.

<table>
<thead>
<tr>
<th>Former URLs</th>
<th>New My Account URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tipasa's user portal:</td>
<td></td>
</tr>
<tr>
<td><a href="https://yourlibrary.account.worldcat.org/profile">https://yourlibrary.account.worldcat.org/profile</a></td>
<td><a href="https://yourlibrary.account.worldcat.org/account">https://yourlibrary.account.worldcat.org/account</a></td>
</tr>
<tr>
<td>(For WMS libraries) WorldCat Discovery's My Account:</td>
<td></td>
</tr>
<tr>
<td><a href="https://yourlibrary.account.worldcat.org/myaccount">https://yourlibrary.account.worldcat.org/myaccount</a></td>
<td></td>
</tr>
<tr>
<td>(replace &quot;yourlibrary&quot; with your library's identifier)</td>
<td></td>
</tr>
</tbody>
</table>

Check ILL-circulation integration (for WMS libraries)
If your library uses WorldShare Management Services (WMS), we encourage you to verify that your integration with WorldShare Circulation is set up to best meet your needs.
For details, see Set up integration.

For assistance or advice related to any of the above recommendations, please don't hesitate to contact OCLC Support.

When calling OCLC Customer Support (U.S.), press option 7 to be directed to a Tipasa Tier 1 Support Specialist.

Follow-up actions
In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

ACTION

Share these release notes with your colleagues.

Gather your team for the upcoming webinar Product Insights: Resource Sharing.
Date: Wednesday, July 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/community/ill_prime/events/July2020.en.html

Have you signed up for email alerts for News in the Community Center? This ensures that Tipasa release notes and events come straight to your inbox.

![Email Alerts](https://www.oclc.org/community/ill_prime/events/July2020.en.html)

**Include Request ID with problem reports**

When reporting an issue with My Account or WorldCat Discovery, it's very helpful to include the Request ID. It can be found at the bottom of the screen on which the issue occurred. Including this information allows us to directly trace what happened on the request we are troubleshooting.

![Request ID](https://www.oclc.org/community/ill_prime/events/July2020.en.html)

**New features and enhancements**

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/090Tipas...
Provide library users with an enhanced My Account experience

OCLC is launching a new My Account interface to replace the existing Tipasa user portal. By combining expert user interface design with input from the Tipasa community, the new interface offers improved accessibility and a refreshed look. And to better support libraries worldwide, the number of interface languages has been expanded to 17. For libraries with WorldShare Management Services (WMS), the new My Account provides library users with a single easy-to-use interface for managing their interlibrary loan and circulation activities.

Access to the My Account features depends on the OCLC services your library uses, for example:

- If your library only uses Tipasa, then your library users see only their ILL and other requests fulfilled through Tipasa.
- If your library has WMS and WorldCat Discovery, along with Tipasa, then your library users see their circulation information (checked out items, holds, and fees), their ILL requests, and saved searches all in one place. The new interface eliminates the need to flip back and forth between the former Tipasa user portal and WorldCat Discovery’s My Account pages.
- If your library also has WorldCat Discovery’s Course Reserves, then your library users have access to Course Reserves as well.

Library users do not need to take any action to begin using the new My Account, since everything in their profiles/accounts transfers automatically. However, we do recommend some preparation by your ILL team.

**By June 19, please prepare for the switchover to new My Account** by reviewing and addressing the recommendations above related to custom colors, chat functionality, and retention of closed requests.

Improved accessibility and refreshed interface

The new My Account experience was developed with accessibility and responsive design in mind. It provides additional compliance with WCAG 2.1 accessibility guidelines that are required by legislation for many libraries. Updated ACRs/VPATs are available for your records with this release. To request a copy for the new My Account interface, please email accessibility@oclc.org. For additional information on accessibility, see the OCLC accessibility statement.

Library users are now automatically directed to the new My Account interface at [https://yourlibrary.account.worldcat.org/account](https://yourlibrary.account.worldcat.org/account) (replace “yourlibrary” with your library’s identifier).

Similar to the former user portal, library users see a list of their (active and closed) ILL requests, along with options to create, duplicate, cancel (if enabled), renew (if enabled), and view details for requests. Checkboxes now allow the user to select multiple items or all items.
When a list exceeds 25 items, a Show More option is available for retrieving the next 25 items.

For more information, see My Account.
Integrated experience for managing circulation and ILL requests (for WMS libraries)

If your library has both Tipasa and WorldShare Circulation, your users now have an integrated experience for managing their ILL and circulation activities. Previously, users needed to visit the user portal for ILL requests and WorldCat Discovery’s My Account for items held or checked out from your local collection.

For your users, the Requested tab includes not only ILL requests but also holds placed on local items.

Note: It's important that WorldShare Circulation Integration for Tipasa is set up correctly, so that a temporary circulation record is created when the item is shipped by the lender.

The Checked Out tab likewise includes items from both ILL and your local collection.
The Fees tab displays all outstanding and accruing charges on the user's account. (If your library works with Paysafe or WPM Education, users can pay their fees online. A one-time activation fee will apply. Please contact your OCLC sales representative if you're interested in enabling online payments.)

The Saved Searches tab displays all of the user's saved searches from WorldCat Discovery. These can be re-run or deleted.
Several new features provide a more streamlined interaction with WorldCat Discovery. [1] The new search box lets the user easily start a new search. [2] Streamlined navigation provides easy access to saved items and lists. [3] Linked titles offer quick access to item details. [4] The Course Reserves link provides easy access to course reserve (for libraries with this service enabled).
For more information, see My Account for Tipasa and WorldShare Circulation.

Known issues

For a list of current and recently fixed issues, see Known issues.

Future releases

In upcoming releases, we plan changes to address Known issues with View Profile, as well as provide the ability to hide WorldCat Discovery features. We also expect to implement the Chat widget in My Account.

Important links

Product Insights: Resource Sharing

To help you become familiar with the enhancements and fixes included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, July 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC-04:00)
Registration: https://www.oclc.org/community/ill_prime/events/July2020.en.html
Please note the session time zones when registering. The sessions will be recorded and archived for future viewing on the [OCLC Community Center](https://www.oclc.org). Please register, even if you are unable to attend, to receive a link to the recorded session.

**Support websites**

Support information for this product and related products can be found at:

- [Tipasa product website](https://www.oclc.org)
- [OCLC Community Center](https://www.oclc.org)
- [OCLC Support](https://www.oclc.org): When calling OCLC Customer Support (U.S.), press option 7 to be directed to a Tipasa Tier 1 Support Specialist.
- [Browser compatibility chart](https://www.oclc.org)