WorldCat Discovery 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 Tipasa 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 the new URL, branding, and chat functionality.

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>
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</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:
**ACTION**

https://yourlibrary.account.worldcat.org/account

Replace **yourlibrary** with **your library's URL qualifier** or Registry ID.

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**Review branding & customizations**

Check your library's [Branding & Customization](https://yourlibrary.account.worldcat.org/account) settings to ensure that custom colors are appropriate for My Account. You may also wish to review your [Logo Settings](https://yourlibrary.account.worldcat.org/account) to ensure that the correct image and home page URL are configured.

Caution: Changes to these settings will also be applied to the WorldCat Discovery interface.

Begin by reviewing the new My Account pages:

2. Examine the page header/banner, footer, and buttons within the page to ensure colors meet your expectations, logo image is correct, etc.
3. To change your configurations, go to OCLC Service Configuration and navigate to WorldCat Discovery and WorldCat Local > User Interface Options

My Account custom colors are controlled by these two selections:

<table>
<thead>
<tr>
<th>Option</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary color</td>
<td>&quot;Search and fulfillment buttons&quot;</td>
</tr>
<tr>
<td>Secondary color</td>
<td>&quot;Banner and footer color&quot;</td>
</tr>
</tbody>
</table>

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**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.

To make chat available to your library users from My Account in the meantime, you may want to add a new service link to the Resources menu (formerly Library Links).

To do this:
ACTION

- Go to OCLC Service Configuration and navigate to WorldCat Discovery and WorldCat Local > User Interface Options > Custom Links.
- Add a Custom link with:
  ◦ Link type: other
  ◦ URL: <URL for your chat service>
  ◦ Display text: <descriptive text>
- Save Changes.

Note: If your library's chat widget is already set up as Custom link 1 and you would like the widget to continue to display within WorldCat Discovery, do not make any changes to Custom link 1.

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.

The URL for My Account is changing. Replace yourlibrary with your library's URL qualifier or Registry ID:

<table>
<thead>
<tr>
<th>Interface</th>
<th>Former URL</th>
<th>New URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Account</td>
<td><a href="https://yourlibrary.on.worldcat.org/myaccount">https://yourlibrary.on.worldcat.org/myaccount</a></td>
<td><a href="https://yourlibrary.account.worldcat.org/account">https://yourlibrary.account.worldcat.org/account</a></td>
</tr>
<tr>
<td>My ILL Requests</td>
<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/requests">https://yourlibrary.account.worldcat.org/account/requests</a></td>
</tr>
</tbody>
</table>

Note: The former URLs will automatically redirect the user to the new My Account page as of 20 June 2020. URLs in WorldCat Discovery at this time may still display the former URL but will redirect automatically to the new URLs listed above. On 24 June 2020 with the WorldCat Discovery release, URLs in the WorldCat Discovery interface will be updated to match the new URLs mentioned above. Automatic redirects will remain in place to allow users who are using bookmarks a chance to update to the new URL but may be removed in a future release.
Check ILL-circulation integration (for Tipasa libraries)

If your library uses Tipasa, 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.

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.

New features and enhancements

Provide library users with an enhanced My Account experience

OCLC is launching a new My Account interface to replace the existing portal for WMS library users. By combining expert user interface design with input from the community, the new interface will offer a refreshed look and improved accessibility.

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

If your library uses WorldCat Discovery, along with WMS, your users will enjoy a refreshed, WCAG 2.1-compliant user interface, access to WMS circulation information (checked-out items, holds, and fees), and saved searches.

- If your library uses Tipasa and WorldCat Discovery, along with WMS, your users will see their circulation activity (checked-out items, holds, and fees), Tipasa ILL requests, and saved searches all in one unified interface. The new My Account will provide library users with a single easy-to-use interface for managing all their interlibrary loan and circulation activities. It also will eliminate the need for users to move back and forth between the existing Tipasa user portal and WorldCat Discovery’s My Account pages.
- If your library uses WMS only, the new My Account will provide your library users with a refreshed look and improved accessibility to review their circulation activities.

Library users will not need to take any action to begin using the new My Account, since everything in their current profiles/accounts will transfer automatically. However, we have identified a few things you may want to do to help prepare for this change.
By June 19, please prepare for the switchover to new My Account.

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.

As of 20 June 2020, your library users will be automatically directed to the new My Account interface at https://yourlibrary.account.worldcat.org/account.

Similar to the former My Account page, library users see a list of checked out items, hold requests, and outstanding fees.

The Checked Out tab now includes the exact date and time when an item is due as well as the ability to select multiple items to renew at once:
The **Requested** tab displays all hold requests including open holds, holds with an item in transit to the pickup location, and items ready for pick up. Library users can edit or cancel their requests until the item is in transit or ready for pick up.

Items ready for pick up will now display the exact date and time when the item reservation will expire. Users can also select multiple holds to cancel at a time.

In the following example, the last request represents an interlibrary loan hold created via Tipasa integration. See below for more details about Tipasa requests.
The Fees tab displays all outstanding charges on the user's account. If your library offers online payments, the payment button will also appear.

Note: Estimated accruing charges will only appear on the Checked Out tab.
Integrated experience for managing circulation and ILL requests (for Tipasa 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 local holds and Tipasa requests. If your library has Tipasa integration enabled, the list is automatically merged to provide a single entry for each request.

The Checked Out tab likewise includes a merged list of items from both Tipasa and your local collection.

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.

See the Tipasa release notes for more information.

WorldCat Discovery features

The Saved Searches tab displays all of the user's saved searches from WorldCat Discovery. Saved Searches can be run or deleted from the list.
Additional WorldCat Discovery features include:

1. Basic and advanced search options to allow the user to easily start a new search
2. Direct link to your library's Course Reserves
3. Links to library-defined resources to guide users to relevant services and content, including any virtual reference services (see above)
4. Streamlined navigation to provide easy access to saved items and lists
5. Hyperlinked titles to offer quick access to the record in WorldCat
Known issues

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

Important links

Post release sessions

To help you become familiar with the new features, enhancements and improvements included in this release, there are [number of update sessions] update sessions scheduled. Please note the session time zones when registering. The sessions will be recorded and archived for future viewing on the OCLC Community Center. Please register, even if you are unable to attend, to receive a link to the recorded session.

- WorldCat Discovery
  - Product Insights: WorldCat Discovery
  - Date: 11 June 2020 at 12:00 pm EDT (UTC -4)
• WorldShare Management Services
  ◦ Product Insights: WMS
  ◦ Date: 16 June 2020 at 2:00 pm EDT (UTC -4)
  ◦ Register Now

• Tipasa
  ◦ Product Insights: Resource Sharing
  ◦ Date: 15 July 2020 at 2:00 pm EDT (UTC -4)
  ◦ Register Now

Support website(s)

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

• WorldCat Discovery
• Contact OCLC Support
• OCLC Community Center
• Browser compatibility chart

Include Request ID with problem reports

When reporting an issue with WorldCat Discovery or the new My Account interface, it is extremely helpful to include the Request ID. The Request ID is 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.