My Account release notes, January 2021

Introduction

This release of My Account provides two enhancements. These features will help you manage more complex workflows, including:

- Provide a better experience on ILL patron request forms for country, state/province, and format fields (for Tipasa libraries)
- Identify My Account activity in WorldShare Circulation and Reports (for WMS libraries)

These enhancements are the direct result of your feedback.

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.

If your library uses both Tipasa and WorldShare Management Services (WMS), we encourage you to verify that your integration is set up to best meet your needs.

For details, see Set up integration.

With questions or for assistance with setup, contact OCLC Support.
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.

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

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**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.
New features and enhancements

Provide a better experience on patron request forms for Country, State/Province, and Format fields

For libraries with Tipasa

Fields on the patron request forms have been updated to work more intuitively:

• Country
• State/Province
• Format

Prior to this release, values defaulted to the first item in the list and users too frequently received errors such as "missing or invalid State/Province".

Country field

The value for the Country field now normally displays as "Select Country". If you have specified a default Country in OCLC Service Configuration, that Country value will be pre-selected for the patron. The value can alternatively be passed from the patron record. For details, see Tab-delimited patron data loading.

State/Province field

The value for the State/Province field now normally displays as "Select State/Province". If you have specified a default State/Province in Service Configuration, that State/Province value will be pre-selected for the patron. The value can alternatively be passed from the patron record. For details, see Tab-delimited patron data loading.

Format field

The value for the Format field now normally displays as "Select Format". If you have specified a default Format in Service Configuration, that Format value will be pre-selected for the patron.

Summary of field options

You can choose from the following options to specify the values your library users see when accessing the patron request forms.

<table>
<thead>
<tr>
<th>Field</th>
<th>No configuration change</th>
<th>Set the default in Service Configuration</th>
<th>Populate the value from patron data (e.g., Toronto Canada)</th>
</tr>
</thead>
</table>

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/My_Account_release_notes_a...
As before, you may also specify that the field is required, ensuring the library user makes a selection before submitting the request.

For more information, see [Customize the patron request forms](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/My_Account_release_notes_a...).

**Identify My Account activity in WorldShare Circulation and Reports**

*For libraries with WorldShare Management Services (WMS)*

As of this release, you will be able to identify My Account as the transaction source of circulation events in WorldShare Circulation's transaction history and in WorldShare Reports and Report Designer. This capability was available to WMS libraries with the legacy patron interface (My Account in WorldCat Discovery) and can help you to monitor or troubleshoot activity by your library users.

If your library [retains transaction history for WorldShare Circulation](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/My_Account_release_notes_a...), "Patron" will be identified as the source of renewal events in transaction history for a [patron](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/My_Account_release_notes_a...) or [item](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/My_Account_release_notes_a...).
In WorldShare Reports and Report Designer, the three circulation event types that can occur in My Account (renew, edit hold, and cancel hold) will identify the Event Transaction Source as "PLATFORM_PATRON" in any report generated from the Circulation Events universe. PLATFORM_PATRON was used for the legacy patron interface and will also continue to be assigned to holds created in WorldCat Discovery and to any events triggered by the WMS NCIP Service's patron profile.

Note: This change is not retroactive. For events that occurred between June 2020 and January 2021, the transaction source for My Account activity will continue to display as "Other" in WorldShare Circulation and "N/A" in WorldShare Reports and Report Designer.

**Known issues**

For a full 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, 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.

- Tipasa
  - Product Insights: Resource Sharing
  - Date: Tuesday, January 26, 2021, 2:00 pm EST
  - Register Now
- WorldCat Discovery
  - Product Insights: WorldCat Discovery
  - Date: Thursday, March 4, 2021, 11:00 am EST
  - Register Now
- WorldShare Management Services
  - Product Insights: WMS
  - Date: Tuesday, March 16, 2021, 1:00 pm EST
  - Register Now

**Support websites**

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

- Tipasa
• WorldCat Discovery
• WorldShare Circulation
• OCLC Community Center
• OCLC Support
• Browser compatibility chart