Release Date: June 20, 2022

Introduction

This release of My Account provides enhancements to help you offer an improved experience for your library users:

- View WorldShare Circulation borrowing history in My Account (WMS libraries only)
- Provide Article Exchange links for off-system copy requests (Tipasa libraries only)

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.

<table>
<thead>
<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>If your library uses WorldShare Management Services (WMS), determine if you will allow your users to enable borrowing history for display in My Account. For details, see WorldShare Circulation release notes, June 2022.</td>
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<tr>
<td>If your library uses both Tipasa and WMS, we encourage you to verify that your integration is set up to best meet your needs.</td>
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<tr>
<td>If your library plans to enable WorldShare Circulation borrowing history for My Account, it is recommended to use the...</td>
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same retention period for Tipasa’s Patron Data Retention and WMS’s Patron Borrowing History.

For details, see Set up integration. Contact OCLC Support with questions or for assistance with setup.

For Tipasa or WorldShare ILL, be sure to utilize Smart fulfillment functionality, including:

- **Real-time availability for ILL**, which significantly reduces the number of times you respond “no” and “In use, on loan”
- **Automated Request Manager**, which enables you to save time by automating routine ILL workflows
- **Smart lender strings through the Automated Request Manager**, which helps you improve fill rates and turnaround times
- **Turnaround Time dashboards** and tips to Improve turnaround time

If your library uses WorldCat Discovery, you are able to customize the following:

- Enable/disable search history functionality
- Enable/disable save search functionality
- Configure custom text for search history navigation bar label
- Configure custom text for save search action

For details, see WorldCat Discovery release notes, March 2022.

### 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 OCLC Community Center? This ensures that release notes and events come straight to your inbox.
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

View WorldShare Circulation borrowing history

For libraries with WMS
Users now have the ability to view their WorldShare Circulation borrowing history in My Account. When enabled by your library, the new **Borrowing history** tab will appear and your users will have the choice to enable retention of their history from the **Profile** tab.

**Borrowing history** allows your users to see a list of materials that they have previously had on loan or used in the library via the [in-house use workflow](https://www.oclc.org). Entries are added to the user's history as materials are returned to the library. For example, an item on loan will continue to appear in the **Checkouts** tab until the item is returned and checked in. If borrowing history is enabled when the item is returned, then that item will appear under the **Borrowing history** tab.

Note: The new borrowing history feature is separate from the existing, staff-facing transaction history. The data for each feature is stored and retained separately by WMS. Therefore, you can enable/disable each feature separately, configure different retention periods, etc. For details, see [WorldShare Circulation release notes, June 2022](https://www.oclc.org).

Using borrowing history

Bibliographic, item, and usage data will be visible for each entry in a user's borrowing history list. This information is
collected at the moment that the item is added to the user's history. For example, the item's title, shelving location, call number, and enumeration will not change in the history even if the bibliographic data is changed or the item is withdrawn from the library's collection.

Entries are automatically removed from borrowing history if the user or your library disables the feature or your library's retention period elapses.

Borrowing history's Status column indicates if the item was returned by the user or if the user claimed the material was lost or was never on loan. The Date column indicates when the item was returned to the collection.

By default, borrowing history will be sorted with the most recently returned item first. The user may alternatively choose to sort the list by Date or Title.

Titles links to WorldCat Discovery are provided so that your users can view current availability, export bibliographic citation information, make a hold request, etc. Temporary items and containers will not be hyperlinked.

Note: If your library uses Tipasa and WMS, the request details and the ability to request again will appear in the user's borrowing history tab for temporary items created via Tipasa WMS integration if the user has opted into borrowing history and the requested material was previously checked out or used in the library. Otherwise, a user's request history will continue to display under Requests according to the Tipasa retention policy you have configured. OCLC recommends setting the same retention period for Tipasa and WMS history.

Note: If your library participates in a WMS circulation group, then a user's borrowing history will include all items used, regardless of which library owned the item, where the item was checked out or returned, etc. Your library will control if the borrowing history feature will be offered to your local users as well as the retention period for your local users. For more details, see WorldShare Circulation release notes, June 2022.

Enabling borrowing history

Each user controls the retention and display of their WorldShare Circulation borrowing history. By default, all users are opted out of borrowing history and will be shown an invitation to enable retention when viewing the Borrowing history tab.
Note: Your users will not see the Borrowing history tab or the option to enable borrowing history until your library has activated the feature and set a retention period in OCLC Service Configuration > WMS Circulation > Admin/General > History > Patron Borrowing History. For more details, see WorldShare Circulation release notes, June 2022.

To enable borrowing history for their account, users must go to the Profile tab and toggle on the Enable my borrowing history option. Your library's retention period will display in the explanatory text.
No history will appear in the **Borrowing history** tab until the user has returned at least one item to the library *after* enabling the feature.
Disabling borrowing history

Your users can disable borrowing history at any time via the Profile tab. The user will be warned that all of their retained history will be deleted.

After disabling and deleting history, the user will no longer see any of their history data in the Borrowing history tab.
Instead, the user will see the invitation to enable history (see above).

Caution: A user’s borrowing history data and opt-in preference will be deleted if your library disables the feature for all users. Retained history data may also be deleted if your library reduces your retention period. For more information, see WorldShare Circulation release notes, June 2022.

**Provide Article Exchange links for off-system copy requests**

*For libraries with Tipasa*

For off-system copy requests, your library users will now see the appropriate Article Exchange links in My Account. Links will display once the file has been dropped in the Tipasa request and the status has updated to Received. These requests will appear just like requests supplied by OCLC network suppliers.

For more information, see Off-System Requesting.

**Bug fixes and known issues**

For a full list of current and recently fixed issues, see Known issues for My Account.

**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: Wednesday, July 20, 2022, 2:00 pm EST
  - Register Now
- WorldCat Discovery
  - Product Insights: WorldCat Discovery
  - Date: Thursday, August 11, 2022, 12:00 pm EST
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