Access and customize My Account

Last updated: Tue, 06 Jul 2021 19:16:37 GMT

Learn how to access My Account and customize the look of the My Account screen in Service Configuration using the User Interface Options settings of the WorldCat Discovery and WorldCat Local module.

Access My Account

Users can access the My Account screen from their WorldCat Discovery interface. Additionally, the link to My Account is as follows:

- https://yourlibrary.account.worldcat.org/account
  - Replace yourlibrary with your library's URL qualifier or Registry ID.

Navigate My Account

Access the available sections by using the main tab headings on the page. You can also access the areas of My Account using the Profile drop-down menu in the banner.

To search WorldCat Discovery, enter search terms in the main search bar or use the Advanced Search link.

Course Reserves are accessible from My Account as are any custom links configured by the library. Custom links appear under the Resources drop-down menu.

Navigate My Account by keyboard

Navigate My Account more quickly by screen reader or using your keyboard.

When the browser focus is at the top of the page, press the Tab button once to expose the Skip to Main Content option or press the Tab button twice to expose the Skip to Footer option. Pressing Return moves the browser focus to the corresponding section of the page.
Inactivity timeout

My Account alerts library users when their session is about to end due to inactivity. After 25 minutes, a message with a 5-minute timer is displayed. The user can choose to continue working or sign out. After 30 minutes of inactivity, the user will be automatically signed out.

Customize My Account

You can customize the look of the My Account interface by navigating to the WorldCat Discovery and WorldCat Local User Interface Options in the Service Configuration. Use this screen to update your banner and custom links.

Caution: Altering these settings will change the appearance across your WorldCat Discovery interface. See User Interface Options for additional WorldCat Discovery configuration options.

Branding & Customization

Use the Branding & Customization section to set the colors to appear on My Account.
My Account custom colors are controlled by the below settings:

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>SETTING</th>
<th>OPTION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Search and fulfillment buttons</td>
<td>• Buttons</td>
<td>1DA608</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Icons</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Active Tab</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Header and footer color</td>
<td>• Header and footer</td>
<td>693086</td>
</tr>
<tr>
<td>3</td>
<td>Unvisited links</td>
<td>• Unvisited links</td>
<td>07C7EE</td>
</tr>
<tr>
<td>4</td>
<td>Navigational bar color</td>
<td>• Navigational bar</td>
<td>20476B</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ If a Navigational bar color has not been previously set, the default color 545454 (dark gray) is used.</td>
<td></td>
</tr>
</tbody>
</table>
Recommendations for color selections:

- For header and footer, select a light color that best reflects your institution's main brand color.
- For buttons and icons, select a dark color that coordinates or contrasts with the secondary color.
- Based on the color selections, the text on the navigation bar will be either white or black.
  - To test the white or black text:
    - In Service Configuration, select the new color and Save. On the My Account page, refresh the browser to apply the new color.
    - Pick a slightly darker color to change text from black to white.
    - Pick a slightly lighter color to change text from white to black.
- Sort icons will appear as greyed out when there are no items to sort.
- List headers have a white background and black text.

Logo Settings

<table>
<thead>
<tr>
<th>FIELD</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logo image URL</td>
<td>If your WorldCat.org currently does not have a logo image, or if you would like to replace the current one, ensure the URL is no longer than 255 characters. The logo image also cannot exceed 80 pixels in height and 275 pixels in width. Match the background color of this image to your logo color to mimic a screen-width banner.</td>
</tr>
<tr>
<td></td>
<td>Image formats:</td>
</tr>
<tr>
<td></td>
<td>• .png</td>
</tr>
<tr>
<td></td>
<td>• .jpeg</td>
</tr>
<tr>
<td></td>
<td>• .tiff</td>
</tr>
<tr>
<td></td>
<td>Note: Images larger than this will automatically be resized.</td>
</tr>
<tr>
<td></td>
<td>For the best user experience, we recommend configuring a secure image (beginning with &quot;https&quot;). If the logo image uses &quot;http://&quot; but your user is accessing a secured URL, the logo image will not display in the header. In this case, users will see your text instead.</td>
</tr>
<tr>
<td></td>
<td>After adding your logo, click <strong>test URL</strong> to confirm your choice.</td>
</tr>
</tbody>
</table>

Home page URL

Alternative text is also used by screen readers and will display in place of the logo image if the URL cannot be reached.

Logo alternative text

Type text that will appear when the cursor hovers over the logo.

Custom Links

Choose up to 7 custom links to appear in the Resources menu. Provide the URLs, link type and accompanying text for...
up to 7 custom web links (e.g., links leading to your library home page, Ask a Librarian, or the user account).

There is a 25 character limit on the text for each link.

Note: If you wish to allow remote access outside your IP address, one of your custom links must be to your remote access page, and you must choose remote access login as the link type.

<table>
<thead>
<tr>
<th>CUSTOM LINK</th>
<th>HOW TO CONFIGURE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chat with Librarian</strong></td>
<td>Chat functionality displays in the bottom right corner of the My Account screen. When chat is collapsed it will appear as a circle with two overlapping chat icons. When a user hovers over the icon, they will see the icon slide out to display a floating button with the text Chat with Librarian. This functionality moves with users as they scroll up or down the screen. When the Chat link is selected, the chat widget will open in a new window to connect users to the library’s configured chat service. See User Interface Options, Custom Links for more information. When a user leaves the chat, the floating button will collapse into a discrete circle. Create this link if you want to provide a link to a chat widget. You must use Custom link 1.</td>
</tr>
</tbody>
</table>

- Link type: Select library contact info
- Display Chat Widget: To display the chat widget for library users, select Yes.  
  - Do you have a QuestionPoint account? Select No. QuestionPoint is no longer supported.  
  - Chat code: When copying and pasting a code snippet, ensure that it is copied directly from the source. When the code is copied from an e-mail or text document, carriage returns can sometimes be entered which will cause the code to fail.  
  - Display text: Create a custom text label of your choice  

Note: The recommended size for the widget is 185 pixels wide x 275 pixels high. URLs referenced within
the chat widget code must utilize HTTPS to avoid mixed content warnings raised by most modern web browsers, which could render the chat widget inoperable.

<table>
<thead>
<tr>
<th>Custom link: A to Z list</th>
<th>Create this link to allow users to discover electronic journals held within the WorldCat knowledge base.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link type: Select <strong>other</strong></td>
<td></td>
</tr>
<tr>
<td>URL: Use the URL as shown in <a href="http://%5Blibrary%5D.on.worldcat.org/atoztitles">WorldCat Discovery and WorldCat Local A - Z List and OCLC Link Resolver</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Custom link: Proxy</th>
<th>Create this link if you have a proxy service that allows off-site users outside your IP address to access restricted library content and services.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use <strong>Custom link 3</strong> to configure the remote access login custom link.</td>
<td></td>
</tr>
<tr>
<td>Link type: Select <strong>remote access login</strong></td>
<td></td>
</tr>
<tr>
<td>URL: Enter your library's proxy URL. Use this format if your library uses EZproxy: <a href="http://ezproxy.oclc.org/login?url=">http://ezproxy.oclc.org/login?url=</a> You might need to check <strong>Append current URL to the end of this link</strong></td>
<td></td>
</tr>
<tr>
<td>Display text: Create a custom text label of your choice</td>
<td></td>
</tr>
</tbody>
</table>

When a resource is selected that requires remote authentication, library users will see a box that says **Authentication Required** and includes a link to sign in.

For more information, see [EZproxy documentation](https://help.oclc.org/Library_Management/WorldShare_Circulation/My_Account/010Access_and_customize_My_A...). If your library's authentication is managed through a service other than EZproxy, you will want to confirm the URL format with the proxy vendor.

| Custom link: other URL | Create this link for other resources you would like to provide to library users, for example, your virtual |
Customize WMS Sign In Labels

Use these fields to customize the labels for your WMS Sign In screen.

- **Custom WMS "User Name" label**: Provide a label for the User Name field on your WMS Sign In screen.
- **Custom WMS "Password" label**: Provide a label for the Password field on your WMS Sign In screen.
- **Forgot Password text**: Use the default text, or customize your text by typing over the text. There is a 255 character limit.

Add a Custom Notification

Configure a custom message to display to your library users in WorldCat Discovery and in My Account to notify them of important information.

See Display Settings, Custom Notification for more information.

Hide WorldCat Discovery features

Libraries that subscribe to WorldCat Discovery or FirstSearch are provided with several access points from My Account to WorldCat Discovery. If your library also subscribes to another discovery service and you would like the other service to be the preferred resource for your users, you have the option to hide the WorldCat Discovery access points within My Account. These include:

- Search box
- Advanced Search
- Saved Searches
- Navigation to saved lists, items, and searches
- Title links to details in WorldCat Discovery
To request that the WorldCat Discovery access points be disabled, or if you decide in the future to re-enable the WorldCat Discovery access points, contact OCLC Support.

**Add a Payment Platform**

WMS libraries can enable online payment of library fees from My Account. WMS integrates with the following payment processors to offer a safe and secure payment experience for library users:

- [Flywire's Comprehensive Receivables Solution](#) (CRS)
- [Paysafe](#) (Canada only)
- [WPM Education](#) (UK only)

Caution: A one-time implementation fee is required to enable online payments. Your library or institution will also need an active account with Flywire (Comprehensive Receivables Solution only), Paysafe, or WPM Education. Contact [OCLC Library Services](#) or your OCLC Library Services Consultant to learn more. OCLC staff will work with you to configure and test the online payment experience.

If you have an existing Paysafe, WPM, or Flywire account, use the Payment Platform screen in Service Configuration to integrate WMS with your payment processor.

- Either the Payments Admin or Payments Manager role is required for staff to access the Payment Platform page. Refer to [Circulation roles](#) for more information.

For more information about adding a payment processor, see [My Account, Fees](#).

**Choose a label for the Resources tab**

Configure the label for the Resources menu in the navigation bar and footer. Retain the default label of Resources or enter a custom label appropriate for your users.

To configure a custom label:

1. Navigate to the Display Settings module of the OCLC Service Configuration and select Resources Text.
2. Enable the Use custom text setting.
3. Enter the Display Text.
   - 35 character limit.
   1. Select the desired language from the drop-down.
   2. Add Custom Text to display when the user has selected this language in the WorldCat Discovery and My
5. Click **Save**.