Sierra 5.1 Release Notes

Release Notes

Sierra 5.1 is currently in general release.

⌖ **NOTE:** Customers with Encore need to be at least Encore 4.6 SP2 in order to upgrade to Sierra 5.1.

New features in Sierra 5.1

- In the Delete Records function, staff can restore deleted records from the Process Summary window.
- Staff can open up to ten Parameters tables simultaneously in the SDA or Sierra Web (for example, Loan Rules and Loan Rule Determiner).
- Staff can export the Loan Rules and Loan Rule Determiner tables in CSV format.
- The button for staff to page an item-level hold now says "Page for item," consistent with wording for title-level holds.
- Patrons can freeze holds even if more than 255 days have passed since the hold was placed.
- Password Policies include an option to disable the Sierra Desktop Application's Remember Me functionality.

  🛑 **CAUTION:** Please note that Sierra 5.1 will disable the Remember Me checkbox by default. To enable for all users, please go to Admin -> Parameters -> Security -> Password Policy in the client and scroll to bottom of window. There is an option "Offer Remember Me checkbox on login page".

- The SDA installer can now be used to install and launch Express Lane.
  - program=milmyselfcheck still needs to be added manually to the target in order to launch Express Lane.
  - In Sierra 5.2, Express Lane will require the SDA installer and will no longer launch from the Millennium environment. Libraries should take the opportunity of Sierra 5.1 to update their Express Lane stations.
- Continued improvements to Sierra Web on iOS tablets
- New rate limiting capabilities have been added to Sierra's managed Apache HTTP Server instance so that Innovative staff can more effectively assist libraries to manage problematic bots and other high connect rate disruptive network activity

- Security of patron data uploaded from offline circulation stations has been enhanced through an updated version of the standalone installable client supporting secure (HTTPS) connections to Sierra
- Sierra's search and indexing can now support Icelandic and Khmer languages
- Country and Language code meaning storage lengths have been expanded so that the full display width can be used for non-Roman character alphabets

API updates in Sierra 5.1

- **Announcements**:
  - Introduction of v6.
  - Sierra API Version 3 will be soon be discontinued and will no longer be supported by Innovative.
  - Full CRUD now supported for both bibs and items.

- **New API endpoints:**
  - Item CUD
    - POST /v6/items/ - Create an item record (with appropriate marc and non-marc var fields and non-marc data fields)
    - PUT /v6/items/{id} - Update an item record (includes suppress/un-suppress an item)
    - DELETE /v6/items/{id} - Delete an item by record ID
  - Bib CUD
    - POST /v6/bibs/ - Create a Bib record (with marc-tagged var fields and non-marc data fields)
    - PUT /v6/bibs/{id} - Update a bib record (includes suppress/un-suppress a bib)
    - DELETE /v6/bibs/{id} - Delete a bib by record ID
  - Circulation:
    - GET /v6/patrons/{id}/holds/requests/form - Get the hold request form for a bib record (to assist with placing holds)

- **Improvements:**

  - Place holds error messaging - Extend volume record selection message to include v-tagged content
  - GET /v6/holdings - Variable fields response enhanced with checkin record soft-links
  - GET /v6/items/ - Response enhanced with number of holds and copy number
  - GET /v6/bibs/ - Response enhanced with bib call number

- **Bug Fixes:**

- All GET endpoints: Unexpected values in the Limit function defaults response to 1 result (if < 1) or 50 results (if non-integer) - now first record is always returned.
- GET Items - Fixed field "OPAC Message" now has a display subfield.
- GET bibs/search now finds author name when entered in first-then-last order.
- POST /validate/patrons - patrons whose barcodes contain trailing spaces are validated if CaseSensitivity flag is set to false (same behavior as WebPAC).

Known Issues

Please visit the Sierra 5.1 Known Issues solution for information on issues reported and fixed in Sierra 5.1. For a complete list of existing Known Issues from Sierra 2.0 through the present release, see Known Issues for Sierra (2.0-5.1).

Preparing to update your system

System Requirements

Sierra 5.1 will require Red Hat or Centos 6x or higher. During the prep phase, the Sierra 5.1 self upgrade checks for the required Operating System and Red Hat Network requirements and will fail if those requirements are not met. Details contained in Solution Article here.

Red Hat Network
Access to several repositories and new packages are needed and the upgrade process for Sierra 5.1 will automatically issue Linux package install requests for packages matching the following patterns :

- epel-release (repository)
- git
- ansible
- json-c-devel
- librabbitmq-devel
- unzip
- python-pip
- python2-pip
- wget
- erlang-solutions (repository)
- erlang
- rabbitmq-server
- logstash (repository)
- logstash
- curl

By issuing these requests automatically during the upgrade, if the system being upgraded to Sierra 5.1 is subscribed to the Red Hat Network (or has otherwise been configured to have online access to a repository of operating system packages) at the time of the Sierra 5.1 upgrade, the package additions for Sierra 5.1 will be made automatically and no action is required on the part of the library even for those libraries ordinarily responsible for operating system updates.

For more information on the Sierra Upgrade External Access, Package, and Maintenance Requirements, please see Sierra Upgrade External Requirements.

📎 **NOTE:** The above applies to all Sierra releases since Sierra 2.2. If the system being upgraded is more than one release behind 4.2, additional package install requests may be made for packages required by previous releases. Please review the Supportal Solution Additional Egress Firewall Requirements for Sierra.

Operating System

For Sierra systems running Red Hat Enterprise Linux 4, or running a 32 bit version of Red Hat Enterprise Linux 5, it will be necessary to upgrade the operating system to one of the 64 bit Linux versions above to upgrade to Sierra 5.1.

Solaris

For Sierra systems running any version of Solaris as their operating system, it will be necessary to migrate from that SPARC based server running Solaris to a new physical or virtual Intel/AMD server running 64 bit Linux in order to upgrade to Sierra 5.1.

Release Notes

Release notes include software behavior changes introduced in the update (some may have implications for training or data review prior to upgrade), any actions library staff should take prior to or just after updating the system, and notification of new features and other enhancements included in the update.
- *New* If you are upgrading from a version older than Sierra 5.0, after you restart the upgrade process via Admin Corner to begin the Commit phase, you will see a new prompt before you reboot the server into maintenance mode. The prompt is for a new passkey that you can obtain from CSDirect (https://csdirect.iii.com/custconv-aws) using your login credentials.   This will allow for all future software upgrades to use signed URLs for all software downloads. Please refer to page 15 in the Sierra Self Upgrade Instructions here.
- *New* If you are upgrading from Sierra 5.0 to Sierra 5.1, you will be prompted for the CSDirect passkey twice. Once to start the prep phase and again before the reboot prompt in the Commit Phase. The passkey may change between the time

the Prep and Commit phases are run so please obtain the passkey from CSDirect (https://csdirect.iii.com/custconv-aws) each time.

- *New* If you are upgrading from a version older than Sierra 5.0, after the Sierra 5.1 conversion is complete, a background task is immediately started to recalculate bibliographic record scopes. This is to correct previous scoping changes made in Sierra 4.0 that caused some items to not be properly ordered in display or included in explicit scoped searches. This background task should be completed within a few hours even for the largest databases and should not impact your system. If you are upgrading from Sierra 5.0 to Sierra 5.1, this task was run as part of the Sierra 5.0 conversion.
- Sierra customers who use INN-Reach will not be able to upgrade to Sierra 5.1 at this time if the INN-Reach central server is not on the Resource Sharing 3.1 release which includes the development to support the expanded codes feature of Sierra 4.0. The Sierra 5.1 upgrade will produce an error in the prep phase if the INN-Reach central server you are partnered with is not running Resource Sharing 3.1. Please contact Customer Support if you receive this error or have any questions.
- If you have Encore, it must also be running on Encore 4.6 SP2 or higher to support the expanded codes. The Sierra 5.1 upgrade will check for this during the prep phase and stop if your Encore server does not meet the OS or release requirement. If you have any questions about these requirements, please contact Customer Support.
- *For MyLibrary! customers and Sierra API users who also have the Patron Update Web Service, additional configuration may be necessary to enable all functions in MyLibrary! and the Sierra API. Please contact III support if you are having trouble updating patron information using the Sierra API or within MyLibrary!.*
- If you are upgrading from a version older than Sierra 3.4, the Sierra 5.1 update will enable the 2018 Sierra Fines Paid and Collection Agency feature. This was an optional feature in Sierra 3.4 and Sierra 4.0 and if you answered "no" in either previous update, it will automatically be enabled when you upgrade to Sierra 5.1.

Actions staff must take

- This update consists of a Prep and a Commit Phase. The Commit phase will require approximately 45 minutes to 1 hour of downtime and a reboot of the Sierra servers (application and database). If you own an Encore server, it will also be inaccessible during the Commit Phase. **A full backup (both application and DB servers) is required within 24 hours of the commit phase. Please review your backup schedule and choose the day/time for the commit phase accordingly.**
- At the end of the preparation phase, the update process checks for a successfully completed backup within the last 24 hours and will alert you of potential problems. For customers on 5-day backup schedules, this may indicate that the preparation phase ran on a day outside the normally scheduled backup. This same check is also performed at the beginning of the commit phase. You will not be able to proceed with the commit until a successful backup is verified.

- Innovative customers can request the update via the "Updating your System" section below. Please use the same request form if your library is running a pre-2.0 Sierra version. You can check your version of Sierra by selecting 'About' after clicking 'Help' in the client menu.
- Some libraries have reported that they were unable to launch the Sierra Desktop Application (SDA) after upgrading to Sierra 2.0, SP2 and SP3. This might also be the case with Sierra 5.0 if you are upgrading from an older release (Sierra 2.0 SP1 or older). To avoid this problem, you should either launch the SDA using an icon, or use the "noWebStart" method of accessing Sierra. Add "noWebStart" to the URL used to launch the SDA on each affected workstation (Windows or MAC):http://[APP_SERVER_URL]/sierra/desktop/noWebStart

If the workstation launching the SDA is using "noWebStart" for the first time, the client will be downloaded and installed at that time. A workstation will only need to download the client the first time that "noWebStart" is used.

Libraries that installed Sierra in November 2012 or later had the "noWebStart" method of access set as the system default during installation. It is unlikely that these libraries will experience a problem. If you are not sure what setting is in place at your library, contact Customer Support. The easiest way to determine if there will be a problem on an individual workstation is to look at the contents of the Sierra Desktop Application folder. You should see iiirunner.exe, as in the example below. If the iiirunner.exe file is not present, you should reinstall the SDA using the "noWebStart" method mentioned above.

Updating Your System
For libraries running Sierra 2.0 SP1 or older, please schedule the installation of 5.1 with Customer Support. Submit the Sierra Update Request form.
For libraries running Sierra 2.0 SP2 or newer, you now have the ability to self upgrade via the Admin App. Please find the upgrade instructions here.
If you are a Hosted Sierra system or a Combo (single server) Sierra Training system, please schedule the update with Support. Submit the Sierra Upgrade Request form.