

Sierra 5.2 Release Notes

Release Notes

Sierra 5.2 is currently in general release.

 **NOTE:** Customers with Encore need to be at least Encore 4.6 SP2 in order to upgrade to Sierra 5.2.

 **CAUTION:** In Sierra 5.2, the SDA must run on Java 1.8 and will no longer launch if run on Java 1.6 - [see details](#).

New features in Sierra 5.2

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
"AND NOT" boolean operator in Create Lists The new "AND NOT" operator allows negation of operators that do not currently allow negation or negation of a group of OR'ed criteria. (Winner of the Level Up! Sierra Create Lists challenge in October 2019.)	None	None
Display name on circulation emails Sierra will use the Branch Name from Branch Addresses as the display name for the From: and Reply-To: headers on circulation notices. Sierra will take the display name from the Library Name for due slips and payment receipts and for circulation notices where email information is not in Branch Addresses.	Review Branch Addresses to verify that Branch Name values are appropriate for display to patrons.	Check the display names on outgoing circulation emails and adjust configuration if necessary.

<p>Consistent navigation in My Account</p> <p>In My Account, WebPAC no longer hides the navigation entry for the currently-visible patron information. For example, if the patron is viewing holds, the navigation entry for holds will still display. There is a new class (patFuncBtnCurrent) for the current-page navigation entry. See WebPAC CSS class changes in Sierra 5.2 for details.</p>	<p>Prepare any needed form or CSS adjustments for the newly displayed navigation entry.</p>	<p>Make any needed form or CSS adjustments for the newly displayed navigation entry.</p>
<p>Improved accessibility in My Account</p> <p>Several accessibility flaws with the patron function table in My Account have been resolved. This includes adding labels to form elements and simplifying the table structure for easier parsing by screen readers. Note that some of the HTML tags used in the table are changing, and depending on the CSS selectors used in your particular WebPAC, your CSS may need some adjustment in order to maintain the same appearance. See WebPAC CSS class changes in Sierra 5.2 for details about the specific changes.</p>	<p>Prepare any needed CSS adjustments.</p>	<p>Make any needed CSS adjustments.</p>
<p>Updated "Sierra 2.1" example set for WebPAC</p> <p>An updated "Sierra 2.1" WebPAC example set is available, containing CSS tweaks related to the accessibility changes in Sierra 5.2, accessibility fixes for My Account, Main Menu, and OPAC Menu, and corrections to several small miscellaneous errors. Like the previous version of this example set, it is compatible with any version of Sierra.</p>	<p>None</p>	<p>None</p>
<p>"Remember me" does not save passwords</p> <p>The SDA will no longer store and pre-populate the password when a user chooses to "Remember me on this computer." Only the</p>	<p>None</p>	<p>None</p>

username will be stored and pre-populated.		
<p>Default to not exempt when creating new Sierra users</p> <p>When creating a new user in the Admin App, the default value for the "Exempt" setting (which exempts the user from Password Policies) will be No. (Previously, the default value was Exempt: Yes.)</p>	None	None
<p>Patron name now optional in emails generated for ILL Requests</p> <p>A new option has been added so that system administrators can prevent the patron name from being displayed in emails generated for ILL requests.</p>	None	Optionally, open a support ticket to suppress the patron name in ILL request emails.
<p>Sierra will now force users to access Circa via https</p> <p>To provide increased security, any attempt to access Circa without defining the http protocol will now result in being directed to https.</p>	None	None
<p>Install and run the SDA on MacOS Catalina</p> <p>Users of MacOS can now download an updated installer with support for Catalina.</p>	None	None
<p>Millennium style Forced Login by IP Extended to Sierra</p> <p>Although less frequently used with dynamic IP ranges and changes to security policies, many Millennium libraries have specific use cases simplified by Millennium's ability to force an SDA connection to use a particular login name based on its IP address. This capability has now been extended to Sierra in version 5.2, making the transition to Sierra easier for those libraries.</p>	None	None

Sierra 5.2 System Changes and Important Fixes

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
<p>Install and run SDA on MacOS Catalina</p> <p>Staff using MacOS Catalina will be able to download and install the SDA.</p>	None	None
<p>Java Version Updates</p> <p>Security and scan compliance is improved with updates to the Sierra Java distribution embedded and running internally within Sierra App Server when Sierra Web is used.</p>	None	None
<p>❗ Java Version Requirements for the SDA</p> <p>In Sierra 5.2, the SDA must run on Java 1.8 and will no longer launch if run on Java 1.6.</p>	<p>Use Help About to check the JRE version installed for Sierra on each workstation. If the version is not 1.8, reinstall the SDA using the latest installer.</p>	<p>If any workstations will not launch the SDA, reinstall using the latest installer.</p> <p>See also: How to Uninstall SDA</p>
<p>Java Version / Installer / Environment Improvements for Express Lane</p> <p>The installation process for Express Lane on a new station has been updated and improved to use the newer Sierra environment, rather than the Millennium Environment installer. With the changes in Sierra to support the updates, this new environment must be used for Express Lane in Sierra 5.2, as Express Lane will not launch fully in Sierra 5.2 if still using the Millennium environment.</p>	<p>Install the SDA on Express Lane stations, edit the shortcut, and add program=milmyselfcheck to the SDA target.</p> <p>For libraries on Sierra 5.1: For a seamless upgrade experience, switch to launching Express Lane via the SDA shortcut while on Sierra 5.1.</p> <p>Libraries on Sierra 5.0 and earlier: Test that</p>	<p>If Express Lane is not already running from the SDA environment, install the SDA, edit the shortcut, and add program=milmyselfcheck to the SDA target. Launch Express Lane from this shortcut.</p>

<p>In order for the SDA shortcut to launch Express Lane, the target still needs program=milmyselfcheck to be added manually after installation. For more information, see How to launch Express Lane with Sierra.</p>	<p>Express Lane launches, but continue to run Express Lane from the Millennium environment as normal and switch to the SDA environment after upgrading to Sierra 5.2 or later.</p>	
<p>RDBMS Update</p> <p>Performance, security and scan compliance is improved with update to PostgreSQL Version 11, offering increased parallelism in important Sierra queries, and laying groundwork for Sierra to partition some key tables for the very largest database libraries, where single tables can become unwieldy.</p>	<p>None</p>	<p>None</p>
<p>More Uniform Application of Password Policy</p> <p>Prior to Sierra 5.2, although Password Policy checks were thoroughly applied when a user changed their password in the application, administrators using the Admin App could create an initial password which was non-compliant,. This is changed in Sierra 5.2 so that the same Password Policy constraints apply in each case.</p>	<p>None</p>	<p>None</p>
<p>Usability Fixes in Headings</p>	<p>None</p>	<p>None</p>

<p>Reports</p> <p>A number of different fixes have been made in Headings Reports including proper handling of subfields z when other subfields present, better handling of very long headings, and restored facet control. See Known Issues for more information.</p>		
<p>Increased Reliability in High Volume Pickup Notices</p> <p>At high volume with multiple locations printing pickup notices simultaneously, it was possible for some pickup notices to be dropped, so this area has been reworked in Sierra 5.2 with several fixes, improved inter-location locking, and additional safeguards and diagnostics to prevent this occurrence.</p>	None	None
<p>Improved stability in Sierra-to-Encore Nlink</p> <p>Several possible data conditions could, prior to Sierra 5.2, cause a stoppage of the synchronization link (Nlink) between Sierra and Encore until manually cleared, but this problem has now been eliminated with several updates to the Nlink processing.</p>	None	None
<p>Stubbornly Undelete-able Fields now Delete-able</p> <p>Several possible data conditions in a Sierra field could lead rarely to a situation where a field could not be deleted by a user in the application and required intervention by Innovative Customer Support, but</p>	None	None

these issues are corrected in Sierra 5.2, so the need to request assistance from Customer Support should be eliminated.		
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API updates in Sierra 5.2

NOTE: In Sierra 5.2, API calls referencing v3 will return an error. API consumers should use v6, although v4 and v5 are still supported.

New API endpoints

Manage batch creation of bibs (from a marc file):

POST /v6/bibs/marc/files/upload - Upload and import a MARC file in Sierra

GET /v6/bibs/marc/files/upload/status/ - Get Marc file import status

GET /v6/bibs/marc/files/uploaded - Get list of uploaded & prepared Marc files

DELETE /v6/bibs/marc/files/uploaded/{id} - Delete an uploaded Marc file

New Volumes API:

GET /v6/volumes/ - Get volumes records with option to filter by bib ID

GET /v6/volumes/{id} - Get a single volumes record with bib and item links

Patron self circulation (self check-in and self check-out of items):

POST /v6/patrons/checkout - Patron self-checks an item out (using barcodes)

DELETE /v6/items/checkouts/{barcode} - Item self check-in (no patron required)

Circulation (tracking Sierra's checkouts and holds):

GET /v6/items/checkouts - Get checked-out item records in Sierra

GET /v6/items/{id}/checkouts - Get checkout data from an item record

GET /v6/patrons/holds - Get hold requests in Sierra

Holdings records MARC extraction:

GET /v6/holdings/marc - Generate a binary MARC data file of holdings

GET /v6/holdings/marc/files/{id} - Get the generated binary MARC data file of holdings

DELETE /v6/holdings/marc/files/{id} - Delete a holdings MARC data file

Improvements:

Acquisitions (Blanket Purchase Order improvements)

POST /v6/acquisitions/orders/ - Enhanced with BlanketPO on the response payload

Get /v6/orders - enhanced with "Blanket PO" number filter and added to payload

Record linking:

GET /v6/items/ - Enhanced with volume record links field

GET /v6/bibs/ - Enhanced with items and volumes record links field

GET /v6/orders/ - Enhanced with bib record links field

Bug Fixes:

GET /v5/branches/pickupLocations the language param should only accept ISO codes
Barcode value for patron checkouts picked from the wrong database column
POST patrons/validate checks 100 marc tag for patron name if no n-tagged patron
names fields exist

Known Issues

Please visit the [Known Issues for Sierra 5.2](#) solution for information on issues reported and fixed in Sierra 5.2. For a complete list of existing Known Issues from Sierra 2.0 through the present release, see [Known Issues for Sierra \(2.0-5.2\)](#).

Preparing to update your system

System Requirements

Sierra 5.2 will require Red Hat or Centos 6x or higher. During the Prep Phase, the Sierra 5.2 self upgrade checks for the required Operating System and Red Hat Network requirements and will fail if those requirements are not met. Details are contained in the [Sierra Self-Upgrade solution](#).

Red Hat Network

Access to several repositories and new packages are needed and the upgrade process for Sierra 5.2 will automatically issue Linux package install requests for packages matching the following patterns :

git
ansible
json-c-devel
librabbitmq
librabbitmq-devel
unzip
python-pip
python2-pip
wget
erlang
rabbitmq-server
logstash
curl
libcurl-devel
p7zip
yum-plugin-versionlock
makeself
stunnel

zip
pip
requests
jq
libxml2
python_jinja2

By issuing these requests automatically during the upgrade, if the system being upgraded to Sierra 5.2 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 5.2 upgrade, the package additions for Sierra 5.2 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 the [Sierra Self-Upgrade solution](#).

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 5.2.

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 5.2.

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.

 **NOTE:** 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 solution](#).

 **NOTE:** If you are upgrading from a version older than Sierra 5.0, after the Sierra 5.2 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 or 5.1 to Sierra 5.2, this task was run as part of the Sierra 5.0 or 5.1 conversion.

Sierra customers who use INN-Reach will not be able to upgrade to Sierra 5.2 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 5.2 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 5.2 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 Customer 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 5.2 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 5.2.

Actions staff must take

This update consists of a Prep and a Commit Phase. The Commit Phase will require approximately 30 minutes to 1 hour of downtime and a reboot of the Sierra servers (application and database). 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. Note, if you own an Encore server, it will also be inaccessible during the Commit Phase.

At the end of the Prep 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 Prep 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 Phase 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 5.2 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](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. If the `iiirunner.exe` file is not present, you should reinstall the SDA using the "noWebStart" method mentioned above.

Updating Your System

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](#).

For libraries running Sierra 2.0 SP1 or older, please schedule the installation of 5.2 with Customer Support. Submit the [Sierra Upgrade Request form](#).

For libraries running Sierra 2.0 SP2 or newer, you now have the ability to self upgrade via the Admin App. Please visit the [Sierra Self-Upgrade solution](#).

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