

Sierra 5.3 Release Notes

Release Notes

Sierra 5.3 is currently in general release.

 **NOTE:** Customers with Encore need to be at least Encore 4.6 SP2 in order to upgrade to Sierra 5.3.

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

New features in Sierra 5.3

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
<p>View Outstanding Holds becomes Manage Holds</p> <p>Libraries need more control over outstanding holds information. This set of enhancements allows the library to manage outstanding holds information in real-time and revises the limits available to include limits for item location, hold status, and "special limits." The "Holds placed before" limit is updated to "Holds placed between" two dates.</p> <p>Furthermore, staff can now transfer, cancel, or otherwise manipulate holds in the outstanding holds list. The name of this feature has been changed from "View Outstanding Holds" to "Manage Holds" in the function drop-down list.</p>	None	None
<p>Export Outstanding Holds table</p> <p>The request information in the Outstanding Holds table can be exported into a csv file, which can be used outside of Sierra.</p>	None	None

<p>Display "Frozen" hold status in Sierra hold queues</p> <p>In Check Out mode, Search/Holds mode (and similar), and Manage Holds, frozen holds will display "Frozen" status.</p>	None	None
<p>Create Lists: Create a review file by importing a file of barcodes, record numbers, or other indexed values</p> <p>Users can now upload a file containing item or patron barcodes, record numbers, or other indexed values and populate a review file with the corresponding records.</p>	None	None
<p>Create Lists improvements from Idea Lab</p> <p>This is a collection of several user interface changes to Create Lists to make it more convenient and usable. The changes include the following:</p> <ul style="list-style-type: none"> • The "Stop" range will default to the last-record-number wildcard • Double clicking on an empty review file will start a search • Enlarged the Classic query editing area so that more of the query is visible • Enabled the ability to add a row by duplicating an existing row • Renamed the "Limited" limit to "Current User" to better reflect its purpose (limiting displayed review files to empty and owned by the current user) • Search criteria will not be cleared when changing the Store Record Type • Preserved the view when skipping to next/previous record 	None	None

<p>Volume records in Create Lists and Delete Records</p> <p>For libraries with Volume Holds, the volume (j) record type is now available in the Store Record Type drop-down in Create Lists, and users can now create a review file of volume records and use that file in Delete Records.</p>	None	None
<p>Always page title-level holds</p> <p>When staff place a title-level (bib or volume) hold that can be paged, the hold will be paged automatically instead of prompting the user.</p>	None	None
<p>Clarify hold cancellation notice pop-up</p> <p>When the SDA or Sierra Web prompts about whether to queue a hold cancellation notice, the question on the popup will ask "Notify patron of cancelled hold?" instead of the previous "Print hold cancel notice?" This should be less confusing to staff and make it clear that they are choosing whether or not to queue up the cancellation notice.</p>	None	None
<p>Recover from printer failure when printing notices</p> <p>When staff print circulation notices to a local printer, Sierra offers staff the option to "resend" the notices if there was a problem with printing. Starting in Sierra 5.3, resending will offer a printer selection dialog so that staff can choose a different local printer.</p>	None	None
<p>Send Collection Agency reports securely to UMS</p> <p>Libraries need a secure method of sending their collection agency reports</p>	None	Contact UMS for S3 configuration information, then configure secure transfer in Collection Agency Settings .

<p>since these reports contain sensitive personal information about patrons. A new secure file transfer method has been added to allow secure file transfer via Amazon S3 instead of email. Libraries who do not use UMS or prefer to transfer files in an alternate way can choose the transfer method "None" and access files through Data Exchange (see below).</p> <p>In a future release, the email transfer option will be removed in order to protect the confidentiality of patron information. In order to prepare for this future change, Innovative recommends moving away from email transfer while on Sierra 5.3.</p>		
<p>Archived Collection Agency reports accessible via Data Exchange</p> <p>Library staff can now access archived Collection Agency reports via a new Data Exchange process, "Collection Agency Reporting". (All Collection Agency reports have always been archived, but the archives were previously not accessible to library staff.)</p> <p>The file names are configured via the Base Filename field in Collection Agency Settings, and the retention time for archived reports can be customized by request to Innovative Support (default 14 days).</p>	None	<p>Set the Base Filename field in Collection Agency Settings to configure how archived report files are named.</p> <p>Optionally, open a support ticket to customize the number of days to retain archived Collection Agency reports.</p>
<p>Collection Agency: Print Sierra version in report header</p> <p>UMS wants to be able to consult with libraries about their Collection Agency Settings and needs to know what version of Sierra the library is running. To provide that information quickly and easily, the Sierra version will be available in the header of all Collection Agency reports.</p>	None	None

<p>Update default drop-down value of Global Update to "Review"</p> <p>When first accessing the Global Update screen, the default value in the drop-down will now be the first list item of Review. This will make it easier for libraries who most often work with Review files when using the global update function.</p>	None	None
<p>Enhance error log for Data Exchange Output MARC Records</p> <p>When outputting MARC records using Data Exchange some records will be output with errors, but the log file file doesn't identify which records had errors. Starting in Sierra 5.3, the Output MARC Records error log will include the details of the records that generated errors. The user will be able to download the error log if necessary to check the records with errors.</p>	None	None
<p>Allow libraries to create 5,000 logins</p> <p>Libraries will be able to create up to 5,000 Sierra user logins and see those logins in the Sierra Admin App.</p>	None	None
<p>Expand Float Determiner Table to allow up to 2,500 lines</p> <p>The Float Determiner Table is currently limited to 1,500 lines. The limit will be increased to allow 2,500 lines to be entered in the Float Determiner Table.</p>	None	None
<p>Ignore frozen holds in hold ratio calculation used in INN-Reach</p> <p>A frozen hold can cause INN-Reach requests to become stuck, even if there are other copies available to fulfill requests. With this enhancement, the hold</p>	None	None

<p>workflow will ignore frozen holds and continue to allow INN-Reach requests when there is an available copy of the item.</p>		
<p>Print INN-Reach transit slips at non-checkin locations</p> <p>Materials borrowed from an INN-Reach partner library will trigger the option to print a transit slip if it is checked in at a location that is not the pickup location. This will help to route materials to their intended destinations more quickly and easily.</p>	None	None
<p>INN-Reach Borrowed report</p> <p>INN-Reach now includes a "Borrowed" report. This report will provide customers with a list of what they have borrowed from partner libraries and is intended to be run at the borrowing library.</p>	None	None

Sierra 5.3 System Changes and Important Fixes

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
<p>RHEL 6 / CentOS 6</p> <p>Version 6 is no longer supported in Sierra 5.3.</p>	<p>For Innovative hosted Sierra and Encore servers running RHEL/CentOS 6, please contact Project Manager Kyle McLaughlin (kyle.mclaughlin@iii.com) for migration scheduling and information, if you have not heard from him already. For non-hosted Sierra and Encore servers, please contact your Account Manager for further information.</p>	None

<p>RHEL 8 / CentOS 8</p> <p>Support for version 8 of Red Hat / CentOS was developed for Sierra 5.3, and for Red Hat users this will deliver OS support through the year 2029, but for CentOS users Red Hat's December 2020 Announcement that CentOS 8 updates will end December 31, 2021 (replaced by CentOS Stream 8), leaves no Sierra-compatible CentOS updates after that date. This means for CentOS users, CentOS 7 rather than CentOS 8 is now the longer lived CentOS choice, offering support through June 30, 2024. The now-longer-lived CentOS 7 continues to be supported in Sierra 5.3, and so Innovative expects CentOS libraries will remain on or migrate to CentOS 7 rather than 8 because of the now shorter lifespan of CentOS 8, while Red Hat libraries will migrate to Red Hat 8, which is still on its original timeline. As Red Hat compatible CentOS 8 alternatives emerge, Innovative will consider those for Sierra support, and CentOS libraries are encouraged to share their thoughts and preferences regarding a successor to CentOS.</p>	None	None
<p>TLS Support</p> <p>Sierra 5.3 observes evolving web security standards and browser expectations by eliminating support for TLS v1.0 and TLS v1.1 protocols when negotiating secure connections in its server role, and supporting/accepting TLS v1.2 protocol connections only.</p>	None	None

API updates in Sierra 5.3

NOTE: In Sierra 5.3, API calls referencing v3 will return an error. API consumers should use v6, although v4 and v5 are still supported.

New API endpoints

- GET /v6/patrons/{id}/checkouts/history/activationStatus - Get patron reading history status
- POST /v6/patrons/{id}/checkouts/history/activationStatus - Updates patron reading history status

Improvements

- GET /v6/patrons/{id}/checkouts/history - Added checkoutHistoryId field to the checkout history listing endpoint

Known Issues

Please visit the [Resolved Issues In Sierra 5.3](#) solution for information on issues fixed in Sierra 5.3. For a complete list of existing Known Issues from Sierra 2.0 through the present release, see [Outstanding Known Issues for Sierra \(2.0-5.3\)](#).

Preparing to update your system

System Requirements

Sierra 5.3 will require Red Hat or Centos 7x or higher. During the Prep Phase, the Sierra 5.3 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 5.3 will automatically issue Linux package install requests for packages matching the following patterns:

- apr
- apr-devel
- apr-util
- apr-util-devel
- ansible
- curl
- expat
- expat-devel
- expect
- expect-devel
- git

- jq
- json-c-devel
- libcurl-devel
- librabbitmq
- librabbitmq-devel
- libxml2
- libxml2-devel
- makeself
- openssl
- openssl-devel
- p7zip
- pcre
- pcre-devel
- perl-LDAP
- python
- python-jinja2
- python-requests
- python2-pip
- python3-dnf-plugin-versionlock
- python3-jinja2
- python3-pip
- python3-requests
- python36
- rabbitmq-server
- readline
- readline-devel
- stunnel
- tci
- unzip
- wget
- xorg-x11-fonts-misc
- xorg-x11-server-Xvfb
- xorg-x11-utils
- xz-devel
- yum-plugin-versionlock
- zip
- zlib
- zlib-devel
- epel-release (repo)
- erlang-solutions (repo)
- erlang
- logstash (repo)
- logstash

By issuing these requests automatically during the upgrade, if the system being upgraded to Sierra 5.3 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 5.3 upgrade, the package additions for Sierra 5.3 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 5.3.


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 5.3.

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 5.3 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, 5.1 or 5.2 to Sierra 5.3, this task was run as part of the Sierra 5.0, 5.1 or 5.2 conversion.

Sierra customers who use INN-Reach will not be able to upgrade to Sierra 5.3 at this time if the INN-Reach central server is not on Resource Sharing 3.1 or higher which includes the development to support the expanded codes feature of Sierra 4.0. The Sierra 5.3 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 or higher. 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 5.3 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 5.3 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 5.3.

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 5.3 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 iirunner.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 5.3 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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Attributes

Software versions

- Sierra: 5.2

Taxonomy

- Solutions > Upgrade
- Solutions > Release Notes > Previous

Collections

- Encore
- INNReach
- Millennium
- Sierra
- SkyRiver

[Go to Original Solution](#)