

Sierra 5.5 Release Notes

Release Notes

Sierra 5.5 is currently in general release.

 **NOTE:** Customers with Encore need to be at least Encore 4.6 SP2 in order to upgrade to Sierra 5.5.

 **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 5.5

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
<p>Simplify FTP login</p> <p>Sierra allows library staff to add FTP connection information to the vendor account records. This enhancement will retrieve the FTP info from the vendor record and automatically log the user in to download vendor status reports or print/send orders. If a user selects files that belong to multiple vendors, the connection information for each vendor will be retrieved and used as necessary. When FTP connection information is not saved in the vendor record, the user still needs to manually enter the FTP login information.</p>	None	None

<p>Highlight numbers across all columns in Funds displays</p> <p>Acquisitions staff can view the funds information within the Sierra client, but it is easy to lose your place on the screen when looking at a long list of funds and fund information. This enhancement will highlight the entire row selected in the funds display so that the staff user can easily follow one fund across the page, including the Appropriation, Expenditure, Encumbrance, Free Balance, and Cash Balance columns (also the % column when viewing the Accounting Report Table) to make it easier to see the information for the fund they are working with.</p>	None	None
<p>Switch between fund code and fund name display</p> <p>Acquisitions staff sometimes want to be able to toggle between the fund code and the fund name when viewing the current funds display. This enhancement enables the acquisitions user to right-click to toggle the fund code/fund name column to show either value in the funds display. The toggle works independently of the user-controlled setting (Admin > Options > Setup: Use the fund name instead of code in the fund hierarchy display).</p>	None	None
<p>Export funds/fund codes from Sierra</p> <p>When working in Funds, library staff occasionally want to export the information to send to colleagues or to use the data in another system. This enhancement provides a new Export option in the toolbar of the Funds function to allow acquisitions users to export columns from the funds display as a csv file. When users click the Export button, a window pops-up to select the column/columns to be exported. After selecting the columns to be exported, a csv file is saved with the exported information. At least one column must be</p>	None	None

<p>selected to export the funds information.</p>		
<p>Send an additional courtesy notice</p> <p>Libraries sometimes want to send patrons multiple reminders when items are coming due soon. With this enhancement, libraries will be able to send patrons one additional courtesy notice on the day before an item is due. Additional courtesy notices can be run manually or as autonotices. Additional courtesy notices will <u>not</u> attempt to auto-renew items that are checked out. In the event that autonotices are configured and set to run multiple times per day, an additional courtesy notice will only be sent once to a patron on any given day.</p> <p>For configuration information, see Set Up Additional Courtesy Notices.</p>	<p>None</p>	<p>None</p>

<p>Display the location of the holdshelf</p> <p>In libraries with multiple pickup locations, it can be difficult to determine which holdshelf an item is on. With this enhancement, Sierra will display the location of the holdshelf as part of the status information for an item that is either currently on the holdshelf or was recently cancelled and the clear holdshelf process has not been run. Depending on the library's configuration, the status message will include either the display name from the hold pickup locations table or the branch name. The status message will appear on the View item record screen and in the status bar of the Manage Holds display.</p>	None	None
<p>New workflow for Mark Damaged Items</p> <p>Library staff want a workflow that makes it easy to mark damaged items and bill for their replacement, similar to the lost item workflow in Sierra. This enhancement adds a new option to the Mark Damaged item workflow that ensures a consistent experience for staff and patrons when managing damaged items. The new option is labelled <i>Mark Damaged And Add Bill</i> and it will be used to mark the item as "Billed" and bill the patron for replacement of the item.</p> <p>When using this workflow, the item will be checked in when the item is marked damaged and a bill is added. Based on library policies, a processing fee and billing fee will be added automatically, and the damage charge will be linked to the item and the patron. When the fee is paid, the item status automatically updates to damaged. This allows the library to distinguish "damaged and billed" from "lost and billed" in reports.</p>	None	Optionally, contact Innovative Support to enable the Mark Items as Damaged feature, if it is not already enabled.

<p>Update RFID "Resensitized" color in preferences</p> <p>This enhancement allows the library to set the color preference for the Sensitization Indicator in the user's Sierra preference settings. Sensitization indicator is active only when the library uses RFID tags on library materials.</p>	None	None
<p>Update item category A - D counts when items are checked in</p> <p>Sierra libraries use item categories A - D to set limits on specific types of materials that patrons can have checked out at any one time. When items are returned, these counts need to be updated in real time. In earlier versions of Sierra, these counts were updated when items were checked out. With this enhancement, the counts for item categories A - D are automatically updated when items are returned so that an accurate count is constantly maintained in the patron's record.</p>	None	None
<p>Link to Public Display in Vega Discovery from Sierra clients</p> <p>Currently in Sierra, the View > Public Display menu option will show the active record in WebPAC or Encore. This enhancement provides an option to configure the public display to show the record in Vega Discover by linking to the resource through the ILS record ID. The link will work as long as the record has already been published in Discover. Vega Discover handles incorrect IDs, unpublished records, and suppressed records by returning an error message.</p>	None	Optionally, contact Innovative Support to enable this option in Sierra.

<p>Circulation Notices Support in Vega LX Starter</p> <p>LX Starter provides you with modern, professionally designed email templates for patron notices. You can add library branding to the templates and select the notices you want to enable. LX Starter supports existing Sierra rules for notices, then batches and sends notice emails.</p> <p>For more information about enabling LX Starter see When will Vega LX Starter be available?</p>	None	None
<p>Windows Snap feature</p> <p>Library staff members want to be able to easily size and position the Sierra client windows on their workstations when Sierra is one of several applications they use throughout the day. With this enhancement, staff members can use the Windows Snap feature to move and size the Sierra desktop application on their workstations.</p> <p>By dragging the client with the mouse or using the Windows button in conjunction with specific arrow keys, SDA users can move and position the Sierra client on their desktop. Staff members may also use the Windows Snap commands to maximize or minimize the Sierra client on their desktop.</p> <p>Because of technical limitations, the Windows Snap feature has no affect on the Sierra login window or on bibliographic and patron windows that appear in the multi-window mode.</p>	None	None
<p>Refreshed CAS login pages</p> <p>Systems librarians want to have customized login pages that are appealing to their users and are easier to maintain so that they don't have to put as much time and effort into updating them. This enhancement provides a refreshed set of HTML files for libraries that want to provide an updated look to the CAS</p>	None	Libraries can download these files from CS Direct and apply them through the Web Master function in Sierra. The HTML files can be used with any version of Sierra.

<p>login pages.</p>		
<p>BookNet Canada Sales Data Analysis program</p> <p>Sierra libraries in Canada want to send data from Sierra to BookNet Canada (BNC) so that the libraries can participate in the sales data analysis service BNC provides. This enhancement enables the library to set up a job and tasks in Scheduler to export the library's branch and circulation data weekly and send the exported data files to BookNet Canada.</p>	<p>None</p>	<p>Libraries who wish to use this feature must coordinate directly with BookNet Canada before configuring this feature in Sierra.</p>
<p>Improved upload of Inventory data</p> <p>Library staff want a simple way to upload inventory data files into Sierra. This enhancement provides a new feature in Data Exchange to help users upload .rdi files and convert them to rdi* files.</p> <p>To be uploaded in Data Exchange, the .rdi file must have 1 or more lines where each line is like <i>n:barcode</i>. If the .rdi file is not properly formatted, it cannot be uploaded and Sierra will display an error message: File structure is not correct.</p>	<p>None</p>	<p>None</p>

<p>OCLC ILL changes</p> <p>In December 2022, OCLC is planning to retire the current ILL Direct Request service. This service allows staff to send Sierra ILL requests directly to OCLC WorldShare ILL without having to re-type the request information. Sierra has added support for OCLC's new Request Transfer service.</p> <p>For more information, see Changes to OCLC ILL Direct Request Service.</p> <p><i>*We will no longer support automatic acquiring of ILL items via OCLC with Sierra 5.5.</i></p>	None	<p>To transition to the new service, please complete the following form electronically, then print, sign, and send to OCLC as indicated on the form. Once your institution has been configured for the new service, OCLC will send you an email with instructions for retrieving your API key.</p> <p>OCLC Request Transfer form</p> <p>Once Sierra 5.5 is available and your system has been upgraded, you can open a support ticket to request setup of the new OCLC ILL Request Transfer feature. In the ticket, please provide an API key for each OCLC symbol used on your Sierra system.</p>
<p>NCIP Relais Holdshelf slip print template support</p> <p>A new print template has been added for NCIP holdshelf slips generated upon item checkin. Default fields include the following: patron name, patron barcode, email, telephone, title, author, item barcode, call number, pickup location, and pull date.</p>	None	None
<p>Provide SQL view access to on_holdshelf_gmt and expire_holdshelf_gmt</p> <p>This enhancement adds two new fields to the existing sierra_view.hold SQL view in Sierra DNA. The fields added are <i>on_holdshelf_gmt</i> and <i>expire_holdshelf_gmt</i>.</p>	None	None

<p>Provide SQL view access to hold_removed data</p> <p>This enhancement adds a new SQL view to Sierra DNA to give reports users access to information about holds that have been removed, including the time the hold was removed, the username of the person who removed it, the PID of the process that removed it, and the program name that removed it. The new view is sierra_view.hold_removed.</p>	None	None
<p>Provide SQL view access to loan rule table</p> <p>This enhancement provides a view of the loan rule table that can be utilized for SQL queries. The new view is the sierra_view.circ_loan_rule view. This new view gives access to the loan rule table fields that are available in the Postgres database in Sierra.</p>	None	None
<p>Encore OverDrive Checkout API changes</p> <p>The OverDrive Checkouts API changed in January 2022. When downloading e-content, Encore now offers a new OverDrive-hosted fulfillment experience where patrons can select a format and open the content, as well as download any necessary software.</p> <p>Note that Encore 5.5 is the first release that bundles the OverDrive changes. The changes have also been delivered as hotfixes for 5.4, 5.3, and 5.2.</p>	None	None

<p>Support the SDA installer on MacOS Monterey</p> <p>In October 2021, Apple announced the release of MacOS Monterey. Libraries that run Sierra on Macs need to be able to install the client on the new MacOS. This enhancement adds support to the SDA for MacOS Monterey.</p>	None	None
<p>Support the SDA installer on Windows 11</p> <p>In October 2021, Windows 11 was released. Libraries that run Sierra on Windows need to be able to install the client on the new Windows OS. This enhancement adds support to the SDA for Windows 11.</p>	None	None

Sierra 5.5 System Changes and Important Fixes

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
<p>Transfer Collection Agency files by email is no longer available</p> <p>Secure transfer for Collection Agency files was introduced in Sierra 5.3. The transfer by email option is no longer available in Sierra 5.5.</p> <p>For the smoothest transition, configure S3 transfer prior to upgrading to Sierra 5.5. If this is not possible (for example, if upgrading from 5.2 or earlier), be ready to configure S3 transfer after upgrade.</p> <p>Upon upgrade to Sierra 5.5, any Collection Agency Settings still using email transfer will be changed to use transfer method "None," which means the reports will not be transferred, but library staff can retrieve them manually through Data Exchange (see Downloading Collection Agency Reports).</p>	<p>If S3 transfer is not already active, contact UMS for S3 configuration information, then configure secure transfer in Collection Agency Settings.</p>	<p>If S3 transfer is not already active, contact UMS for S3 configuration information, then configure secure transfer in Collection Agency Settings.</p>
<p>Reindex auth record phrase entries during Sierra upgrade</p>	None	None

<p>As part of the fix to an issue with sorting of cross-references in authority records, all authority record phrase entries must be re-indexed following the upgrade to Sierra 5.5. This re-index will happen automatically after the commit phase of your Sierra upgrade and must be completed to sort see references in the correct order.</p>		
<p>Ampersand in Sierra passwords</p> <p>Sierra passwords should not contain the ampersand character (&), but different interfaces vary in their handling of ampersands. This update to Sierra allows a user to change a password that currently contains an ampersand and set a new password that does not contain an ampersand. If the user tries to create a new password with an ampersand or other invalid character, Sierra will display an error message: <i>ERROR: Your password contains invalid character(s).</i> The list of valid characters is listed in the Sierra documentation:</p> <p>https://csdirect.iii.com/sierrahelp/Default.htm#sadmin/sadmin_useracctts_auths_users.html.</p>	None	None

API updates in Sierra 5.5

- **Filter duplicate bibs in /bibs/marc endpoint**

The filter logic in the **GET /v6/bibs/marc** endpoint has been updated to dedupe the records returned if the API call is filtered by location and the results include bibs with items in multiple locations.

- **REST API for item paging**

Two new REST APIs have been added to provide information about item holds in pageslips that exist in Sierra. The API will be available in the Sierra API Swagger documentation to users who have Item_Page_Lists permissions.

GET /v6/itempaging/reports/ – returns a list of item paging reports

GET /v6/itempaging/reports/{id} – returns a list of items belonging to an item paging report

- **New homeLibrary element in patron endpoint**

The `/v6/patrons/{patron_id}` API endpoint now contains a new "homeLibrary" element, which includes the branch name and code for the patron's home library. This will make it easier for libraries to obtain this information as part of the patron information from the Sierra API.

Known Issues

Please visit the [Resolved Issues in Sierra 5.5](#) solution for information on issues fixed in Sierra 5.5. For a complete list of existing Known Issues from Sierra 2.0 through the present release, see [Known Issues for Sierra \(2.0-5.5\)](#).

Preparing to update your system

System Requirements

Sierra 5.5 will require Red Hat or Centos 7x or higher. During the Prep Phase, the Sierra 5.5 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 5.5 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 5.5 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 5.5 upgrade, the package additions for Sierra 5.5 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 5.5.


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 5.5.

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 5.5 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 5.0-5.4 to Sierra 5.5, this task was run as part of a previous 5.* conversion.

Sierra customers who use INN-Reach will not be able to upgrade to Sierra 5.5 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 5.5 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, we highly recommend that you upgrade your Encore to Encore 5.5 soon after installing Sierra 5.5 to keep both Sierra and Encore up to date on the latest and aligning software.

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 5.5 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 5.5.

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 5.4 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. 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 SP2 or newer, you now have the ability to self upgrade via the Admin App. Please visit the [Sierra Self-Upgrade Solution](#).

Solution ID

220919133538753

Last Modified Date

04/09/2026 06:36:35 AM

Attributes

Software versions

- Sierra: 5.5

Taxonomy

- Solutions > Upgrade
- Solutions > Release Notes > Previous

Collections

- Encore
- INNReach
- Millennium
- Sierra
- SkyRiver

[Go to Original Solution](#)