



# Sierra 6.2 Release Notes

## Release Notes

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Sierra 6.2 is currently in general release.

 **NOTE:** Customers with Encore need to be at least Encore 4.6 SP2 in order to upgrade to Sierra 6.2.

 **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](#).

**Sierra 6.2 went into general release on June 11, 2024. We released a Sierra 6.2 Maintenance Release on August 5, 2024.**

This maintenance update version of Sierra 6.2 will display in the **Help | About** section of the SDA as **Software Release: Sierra 6.2.0\_12**. The version of Sierra 6.2 released on June 11 will display in the **Help | About** section of the SDA as **Software Release: Sierra 6.2.0\_8**.

Any library, running Sierra 6.1 or older, that preps for update to Sierra 6.2 after August 5, 2024, noon PDT will receive version Sierra 6.2.0\_12. Libraries running Sierra 6.2.0\_8 that want the fixes included in Sierra 6.2.0\_12 can update to that version by choosing to update (again) to Sierra 6.2.

For further information about what fixes are included in Sierra 6.2.0\_12, see [Resolved Issues in Sierra 6.2](#).

A new SMS feature is also included in 6.2.0\_12 which is listed in the feature list below.

## New features in Sierra 6.2

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
<b>Batch cancel order records</b>  Libraries want the ability to batch cancel orders to simplify workflows when mistakes are made or at the end of the fiscal period.  A new <b>Batch Cancel Orders</b> function has been	None	To enable access to the new feature, add <b>Batch Cancel Orders</b> to desired Workflows and add <b>147</b> (Batch cancel orders) to user permissions. See also <a href="#">Can't find the Batch Cancel function</a> .

<p>added to the Acquisitions Workflows in Sierra.</p> <ul style="list-style-type: none"> <li>• A new permission – <b>147</b> (Batch cancel orders) – has been added and must be enabled to use this feature.</li> <li>• The permission works in combination with permissions <b>148</b> (Claim/cancel orders) and <b>79</b> (Cancel upon vendor notification).</li> <li>• A staff member will need permission <b>178</b> to post the transactions to complete the cancellation process.</li> <li>• Batch cancellation works from a review file of the orders to be cancelled. Sierra ignores whether the orders in the review file are "claimable" or not.</li> <li>• The feature can be used with both monographic and serial orders.</li> <li>• Orders can be cancelled with or without cancellation letters to vendors.</li> <li>• A summary screen is displayed to show the status of the orders being cancelled.</li> <li>• The cancellations must be posted to update the encumbrances and order balances.</li> </ul>		
<p><b>Place holds on multiple item or volume records on one bib with a single action</b></p> <p>Library staff members can select multiple item (i) records or multiple volume (j) records on a bibliographic record and place holds all at once.</p> <ul style="list-style-type: none"> <li>• A library staff member must have permission <b>45</b> (Holds Management) to use this feature.</li> <li>• The same patron, pickup location, limit to location, not wanted before date, not wanted after date, and hold note will be used for all holds placed with the same action.</li> <li>• If an override is required to place a hold, the override shall allow all the holds to be placed. <ul style="list-style-type: none"> <li>○ If multiple override conditions exist, the staff user will need to override each condition separately.</li> </ul> </li> </ul>	None	None

<ul style="list-style-type: none"> <li>○ Once overridden, the staff user will not need to override the same condition for additional holds.</li> <li>● A pop-up screen will confirm the number of holds placed for the user and list any errors in placing holds.</li> </ul>		
<p><b>Scope maintenance</b></p> <p>Library staff members now have the ability to administer location-based scopes through a new <b>Scoping Rules</b> function in the Sierra client.</p> <p>Using this function, users will be able to:</p> <ul style="list-style-type: none"> <li>● view a list of scoping rules defined on their system</li> <li>● view the list of location(s) assigned to a location-based scoping rule</li> <li>● edit the list of location(s) assigned to a location-based scoping rule</li> </ul> <p>To maintain scope rules, users must have permission <b>13</b> (Maintain scopemenu/Scope authorities).</p> <p>One scoping rule can be edited at a time. Once the changes are saved, the scope will be reindexed automatically.</p> <p>The state of the scope while changes are being made can be monitored through the history tab.</p> <p>BCODE-based scope rules can only be updated by Innovative staff.</p>	None	Add permission <b>13</b> (Maintain scopemenu/Scope authorities) to enable the new feature for appropriate users.
<p><b>Manage macros in the Admin App</b></p> <p>This enhancement provides separate fields in the Admin App to define macros for the SDA and Sierra Web. When the library upgrades to Sierra 6.2+, existing macros are saved in the SDA fields. The Sierra Web macro fields are empty except for the RESERVED fields. Macros can be updated through either the Admin App or the Sierra client.</p>	None	None
<p><b>"Verify Heading" in Item Records</b></p>	None	None

<p>"Verify Heading" functionality has been re-enabled for use with item records. This allows library staff to use it on non-headings fields in item records to verify the uniqueness of call numbers, running numbers, and similar fields. "Verify Heading" can be accessed from the Tools menu or by using the Ctrl-G shortcut keys.</p>		
<p><b>Logout button on Web Management Reports</b></p> <p>When staff users log in to Web Management Reports using their SAML credentials, a new logout button / link appears in the user interface to give the user an option to logout when they are done. Staff who login to Web Management Reports using their Sierra login can logout of the user interface simply by closing Web Management Reports.</p>	None	None
<p><b>"MARC" option in authorities APIs</b></p> <p>In the Sierra API for authority records, an API user can specify "marc" in the fields to return, and the response will include all MARC data for the record. This feature works with the following API endpoints:</p> <ul style="list-style-type: none"> <li>• GET /v6/authorities/</li> <li>• GET /v6/authorities/{id}</li> </ul>	None	None
<p><b>Patron validation lockout message in Sierra API</b></p> <p>A new patron validation message indicates when a patron has been locked out after five unsuccessful attempts to login. The lockout expires after one minute.</p>	None	None
<p><b>Sierra SMS</b></p> <p>This enhancement allows libraries to send SMS notices to patrons for overdue notices, hold pickup notices, and hold cancellation notices. SMS notices require that the library subscribe to the Sierra SMS service and patrons must opt-in to receive SMS messages.</p> <p>This is a new Sierra SMS service, separate from the existing SMS Alerts. The SMS Alerts product is</p>	None	<p>The Sierra SMS service requires a separate subscription. Contact your account manager for more information. Separate fees will apply.</p> <p><i>Libraries using the Sierra SMS service with Sierra 6.2 must also be sending supported SMS notice</i></p>

unchanged.  <b><i>This enhancement is available in the Sierra 6.2 maintenance release (6.2.0_12).</i></b>		<i>types through LX Starter.</i>
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## Sierra 6.2 System Changes and Important Fixes

Description	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
<p><b>Java heap setting for the SDA</b></p> <p>When launching the SDA, the Java heap setting in <code>iiirunner.lax</code> should be updated to 1GB by default, unless the user's configuration for <code>client_heap_size</code> is set to a lower value.</p>	None	None
<p><b>MacOS Sonoma</b></p> <p>The SDA has been certified to run on MacOS Sonoma.</p>	None	None
<p><b>PostgreSQL 15</b></p> <p>The Sierra database software was upgraded to PostgreSQL 15.</p>	None	None
<p><b>Minimum OS server requirements</b></p> <p>Version 7 is no longer supported in Sierra 6.2.</p> <p>Your servers will need to be on Oracle Linux 8 or RHEL 8 prior to your Sierra 6.2 upgrade</p>	<p>If your system is hosted, we will contact you proactively to schedule your OS upgrade to Oracle Linux 8. If you have not heard from us or have questions, please open a ticket. For non-hosted Sierra and Encore servers, please contact your Account Manager so they can quote the necessary services to help with your OS upgrade.</p>	None

## Known Issues

Please visit the [Resolved Issues in Sierra 6.2](#) solution for information on issues fixed in Sierra 6.2. For a complete list of existing Known Issues from Sierra 2.0 through the present release, see [Known Issues for Sierra \(2.0-6.2\)](#).

## Preparing to update your system

### System Requirements

Sierra 6.2 will require Red Hat or Oracle Linux version 8 as Red Hat will end of life Centos 7 on July 1, 2024. During the Prep Phase, the Sierra 6.2 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 6.2 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
- tcl
- 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 6.2 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 6.2 upgrade, the package additions for Sierra 6.2 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](#).

## **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:** After you restart the upgrade process via Admin Corner to begin the Commit Phase, you will see a 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, allowing for software upg

If you have Encore, we highly recommend that you upgrade your Encore to Encore 6.2 soon after installing Sierra 6.2 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!.

## **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.

## **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**

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### **Last Modified Date**

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### **Attributes**

Software versions

- Sierra: 6.2

### **Taxonomy**

- Solutions > Upgrade
- Solutions > Release Notes > Current

### **Collections**

- Encore
- INNReach
- Millennium
- Sierra
- SkyRiver

[Go to Original Solution](#)