

Sierra 6.5 Release Notes

Release Notes

Sierra 6.5 is currently in general release.

 **NOTE:** Customers with Encore need to be at least Encore 4.6 SP2 in order to upgrade to Sierra 6.5.

 **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](#).

Sierra 6.5 went into general release on November 3, 2025. We released Sierra 6.5 Maintenance Release 1 on Jan 20, 2025.

Each version of Sierra 6.5 will display in the **Help | About** section of the SDA as follows:

- Sierra 6.5 MR1, released Jan 20: Sierra 6.5.0_4
- Sierra 6.5, released Nov 3: Sierra 6.5.0_3

Any library running Sierra 6.4 or older that preps for update to Sierra 6.5 after Jan 20, 2025, noon PDT will receive version Sierra 6.5.0_4. Libraries running Sierra 6.5.0_3 that want the fixes included in Sierra 6.5.0_4 can update to that version by choosing to update (again) to Sierra 6.5.

For further information about what fixes are included in Sierra 6.5.0_4, see [Resolved Issues in Sierra 6.5](#).

Sierra 6.5 Features

Descriptions	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
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<p>Patron Checkout Limits by item type, item location, and library location</p> <p>The new Patron Checkout Limits feature in Sierra 6.5 gives libraries more control over how many items patrons can check out, based on item type, location, or library served.</p> <p>Libraries can set checkout limits based on:</p> <ul style="list-style-type: none"> • Item Type + Patron Type • Item Location + Patron Type • Library Location + Patron Type <p>Key Features:</p> <ul style="list-style-type: none"> • Configure limits via Admin > Parameters > Circulation • Import/export support for easy setup • A new option, Print Locations Served Map, can be printed or emailed <p>Access: Requires permission 379 (Edit patron blocks)</p> <p>User Benefits:</p> <ul style="list-style-type: none"> • Greater flexibility for lending policies • Supports non-traditional materials • Simplifies configuration and policy management <p>Important Notes</p> <ul style="list-style-type: none"> • Innovative does not recommend using Item Categories A–D in combination with Patron Checkout Limits. Libraries should choose one method for limiting items checked out. • If a specific item type/patron type combination is not configured, Sierra treats it as unlimited, subject to other loan rule limits. <p>This enhancement gives libraries more control over how items are loaned to different patron groups.</p>	<p>None</p>	<p>Optionally, configure new Patron Checkout Limits and disable existing item category configurations.</p>
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<p>Open and edit patron record from item record</p> <p>Staff can now quickly open and edit a patron record directly from an item record in Sierra. This enhancement saves time and reduces friction when managing overdue items, updating patron details, or reviewing checkouts—no need to open a separate session or search manually.</p> <p>Key Features:</p> <ul style="list-style-type: none"> • Double-click or right-click patron number to view or edit the record • New Patron View Actions menu available in item records • Edit option opens the patron record in the Check Out (Circulation Desk) screen <p>Access: Requires permission 164 (Update patron records)</p> <p>User Benefits:</p> <ul style="list-style-type: none"> • Faster access to patron details • Reduces need to switch screens or perform manual searches • Improves efficiency in circulation tasks <p>This enhancement simplifies patron management and improves staff productivity</p>	None	None
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<p>Update inventory date from Check-in</p> <p>Sierra 6.5 introduces the ability to automatically update the Inventory Date when items are checked in using the Sierra Desktop App. This feature simplifies inventory tracking for libraries using laptops or RFID scanners and eliminates the need for external inventory tools. Configuration is flexible by location and time period and integrates seamlessly with existing check-in logic.</p> <p>Key Features:</p> <ul style="list-style-type: none"> • Updates the Inventory Date (FF 069) during check-in • Applies only during active inventory periods set per location • Works alongside standard check-in actions (e.g., status updates, holds) • Subtle status tray indicator shows when inventory updates are active <p>Access & Setup:</p> <ul style="list-style-type: none"> • Configure via Admin > Parameters > Circulation > Inventory Check-in Period • Requires permission 373 (View Circulation Parameters) to view or 678 (Edit Inventory Check-In Periods) to edit <p>User Benefits:</p> <ul style="list-style-type: none"> • Simplifies inventory workflows • Eliminates need for external tools • Provides real-time feedback with minimal disruption <p>This enhancement brings core inventory functionality directly into Sierra for smoother, more efficient item tracking.</p>	<p>None</p>	<p>Add permission 678 (Edit Inventory Check-In Periods) to staff logins as needed.</p> <p>Optionally, configure Inventory Check-In Periods to enable updating of Inventory Date.</p>
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<p>Penalty points for patrons with unclaimed holds</p> <p>Libraries can now choose to assign penalty points—instead of monetary fines—for unclaimed holds. This new configuration provides a flexible, non-monetary way to encourage patrons to pick up held items on time. When enabled, penalty points and a note are automatically added to patron accounts during the Clear Expired Holds process.</p> <p>Key Features:</p> <ul style="list-style-type: none"> • Assign points to patron types for unclaimed holds • Add automatic notes to patron records • Points and notes are removed after the penalty period <p>Setup: Requires Innovative staff to configure the new option</p> <p>This enhancement supports libraries looking to manage patron behavior without financial penalties.</p>	None	Open a Support ticket to enable penalty points for unclaimed holds.
<p>Support IMMS's hold placement info for chaotic hold shelves</p> <p>Sierra now supports IMMS hold shelf labeling, allowing libraries to store and display the exact shelf location of held items. This improves staff efficiency and patron experience by making it easier to locate items awaiting pickup. The integration uses the Sierra API for seamless data exchange with IMMS and discovery systems.</p> <p>Key Features:</p> <ul style="list-style-type: none"> • Shelf label shown in the item's Holds tab for staff • Pickup notices include shelf location for patrons • Discovery systems can retrieve shelf info via Sierra API • Visual icon and tooltip added for items ready for pickup <p>User Benefits:</p> <ul style="list-style-type: none"> • Staff can quickly locate held items and assist patrons more efficiently • Patrons receive clearer pickup instructions, reducing confusion • Improved visibility of item location enhances overall service experience <p>This enhancement makes hold pickup faster, easier, and more</p>	None	None

<p>accurate for both staff and patrons.</p>		
<p>Support location change for IMMS's exhibition locations</p> <p>Sierra now supports assigning temporary locations to exhibition items managed by Lyngsoe's Intelligent Materials Management System™ (IMMS). These locations behave like standard locations in public and staff views, but Sierra automatically restores the original location during the next circulation action.</p> <p>Key Features:</p> <ul style="list-style-type: none"> • Temporary location displays in OPAC and affects scopes, sorting, and Create Lists • Original location is automatically restored at next check-in or checkout • Staff are notified when items should be placed at a temporary location • Fully integrated with IMMS workflows <p>This streamlines materials handling while preserving accurate location data.</p>	<p>None</p>	<p>None</p>

<p>Confirm successful LX Starter or Vega Interact connection before sending notices</p> <p>Sierra now checks its connection before sending messages to LX Starter or Vega Interact. If the connection isn't working, it won't try to send the messages and will show an error instead. This helps prevent important messages from being lost without anyone knowing.</p>	None	None
<p>Move System Status functionality into the Admin App</p> <p>The System Status feature has moved from Admin Corner to the Admin App under Backend Management.</p> <p>What's New:</p> <ul style="list-style-type: none"> • View record counts and log stats • Info is view-only <p>Access: Requires Admin App permission</p> <p>Legacy Support: Admin Corner version still available</p> <p>This update improves usability and aligns with the modern Admin App interface.</p>	None	None
<p>Move Restart a Terminal functionality into the Admin App</p> <p>The Restart a Terminal feature has moved to the Admin App under Backend Management.</p> <p>Key Updates:</p> <ul style="list-style-type: none"> • View and manage running processes • Restart or kill one or multiple processes • Sort and refresh process list <p>Access: Requires Admin App permission</p> <p>Legacy Support: Admin Corner version still available</p> <p>This update modernizes terminal management and improves usability.</p>	None	None
<p>Move Maintain Scope Menu functionality into Sierra</p> <p>The Maintain Scope Menu feature is now available in</p>	None	Add permission 13 (Maintain scopemenu/Scope authorities) to staff logins as

<p>the Sierra client as Scoping Menu under Administration.</p> <p>Key Updates:</p> <ul style="list-style-type: none"> • View and edit scope names, menu lines, and order • Reorder scopes alphabetically • Requires permission 13 (Maintain scopemenu/Scope authorities) <p>Legacy Support: Admin Corner version still available</p> <p>This update improves access and usability for managing search scopes.</p>		<p>needed.</p>
<p>Move Batch Check-in functionality into Sierra</p> <p>The Batch Check-In feature has moved to the Sierra client.</p> <p>Key Features:</p> <ul style="list-style-type: none"> • Check in items from completed item review files • Automatically unlinks holds, bookings, and reserves • View progress and cancel if needed • View results after processing <p>Access: Requires permission 59 (Batch Checkin)</p> <p>This feature streamlines bulk item check-in and cleanup tasks.</p>	<p>None</p>	<p>Add Batch Check-In to workflows as needed. Add permission 59 (Batch Checkin) to staff logins as needed.</p>
<p>Move Check Missing Items functionality into Sierra</p> <p>The Check Missing Items feature has moved to the Sierra client as Missing Items.</p> <p>Key Updates:</p> <ul style="list-style-type: none"> • Clear missing items by location or all at once • View removed records and exceptions • Real-time feedback and improved usability: <ul style="list-style-type: none"> ○ View item records directly ○ See item status ○ Keyboard-friendly controls <p>Access: No special permission required</p> <p>Legacy Support: Admin Corner version is deprecated but still available</p> <p>This update streamlines missing item workflows and enhances staff efficiency.</p>	<p>None</p>	<p>Add Missing Items to workflows as needed.</p>

<p>Navigate from Create Lists to Delete Records</p> <p>You can now send review files directly to Delete Records from the Tools > Send to menu in Create Lists.</p> <p>Key Updates:</p> <ul style="list-style-type: none"> • Available to users with Delete Records access • Review file auto-populates in Delete Records • Keyboard-friendly navigation with mnemonic key (L) <p>This enhancement streamlines workflows and improves accessibility.</p>	None	None
<p>Limit access to patron data in Create Lists</p> <p>To improve patron data security, a new permission—Create Lists (No Patrons)—limits access to patron information in Create Lists.</p> <p>Key Restrictions:</p> <ul style="list-style-type: none"> • No access to patron record types or patron-specific conditions • Cannot view, export, or modify review files with patron data • Override requires full Create Lists (18) permission <p>Users can still:</p> <ul style="list-style-type: none"> • See patron review file names and counts • View saved queries with patron conditions (but not apply them) <p>Access: Requires permission 642 (Create Lists (No Patrons))</p> <p>This update helps libraries control staff access to sensitive patron data.</p>	None	As needed, adjust login permissions to assign 642 (Create Lists (No Patrons)) and remove other Create Lists permissions.

<p>Increase limit in Locations Served to 2,000 locations</p> <p>In Sierra 6.5, the maximum number of locations allowed in a Locations Served entry has increased from 1,000 to 2,000.</p> <p>Benefits:</p> <ul style="list-style-type: none"> • Simplifies setup for large libraries • Improves compatibility with LX Starter • Reduces need for multiple entries <p>This enhancement streamlines notice job configuration for multi-location systems.</p>	None	None
<p>Accessibility improvements in Sierra SDA</p> <p>As part of ongoing accessibility efforts, Sierra 6.5 includes updates to the Circulation screens in the Sierra Desktop App to improve compliance with WCAG 2.0 and 2.1 (Level A & AA).</p> <p>Key Enhancements:</p> <ul style="list-style-type: none"> • Improved color contrast and focus indicators • Added accessible names, roles, and labels to buttons and panels • Enhanced keyboard navigation <p>These updates support a more inclusive experience for all users. Accessibility improvements will continue in future releases.</p>	None	None

<p>Sierra branding updates</p> <p>As part of a Clarivate-wide rebranding, Sierra 6.5 updates product logos, copyright statements, login screens, and favicons to reflect Clarivate ownership.</p> <p>Updated Products:</p> <ul style="list-style-type: none"> • Sierra Desktop App & Installer • Sierra Web & Admin App • SAML login forms • Sierra Offline Circulation • Web Management Reports • Sierra WebPAC Pro (default files) • Vega Interact Web Portal <p>UI Enhancements:</p> <ul style="list-style-type: none"> • Updated Half Dome (dark mode) and Glacier Point (light mode) skins in the Sierra client <p>These changes align Sierra products with Clarivate’s brand identity.</p>	None	None
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Sierra 6.5 System Changes and Important Fixes

Descriptions	Recommended Pre-Upgrade Action	Recommended Post-Upgrade Action
None	None	None

Known Issues

Please visit the [Resolved Issues in Sierra 6.5](#) solution for information on issues fixed in Sierra 6.5. For a complete list of existing Known Issues from Sierra 2.0 through the present release, see [Known Issues for Sierra \(2.0-6.5\)](#).

Preparing to update your system

System Requirements

Sierra 6.5 will require Red Hat or Oracle Linux version 8 as Red Hat reached end of life Centos 7 on July 1, 2024. During the Prep Phase, the Sierra 6.5 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 6.5 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
- 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 6.5 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 6.5 upgrade, the package additions for Sierra 6.5 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](#).

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 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 6.5 soon after installing Sierra 6.5 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!.

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 can self upgrade via the Admin App. Please visit the [Sierra Self-Upgrade Solution](#).

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Attributes

Software versions

- Sierra: 6.5

Taxonomy

- Solutions > Upgrade
- Solutions > Release Notes > Current

Collections

- Encore
- INNReach
- Millennium
- Sierra
- SkyRiver

[Go to Original Solution](#)