Sierra user administration for migrating libraries

The focus of this session is to discuss user setup in Sierra – how migrated logins/initials can be converted to Sierra users, or new users created. We will look at the user administration with applications, permissions, workflows etc. in the Admin App. General navigation in the Admin App will also be included.

Underlined topics below are hyperlinks to the Sierra documentation (<https://documentation.iii.com/sierrahelp/Default.htm>) and other resources. Click on the link to open on browser, or right-click the text, select Copy Hyperlink and paste the URL directly into a browser.

A copy of the Sierra documentation is located on your own Sierra server and can be opened from within the Sierra Desktop: **Admin | Manual**. Hyperlinked text can be used to search for topics in the local copy of the documentation.

This schedule is flexible and subject to change.

# Introduction

* Introduction of trainer and trainees
* [Sierra Administration Application](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_app.html) (Admin App) - https://[your Sierra app server]/sierra/admin/

# [Administering user accounts](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts.html)

* [Migrating users from your Millennium system](https://documentation.iii.com/sierra/kb/article.php?cat_id=21&art_id=33) (Sierra Knowledge Base article)
  + Migrated Millennium *user initials* have Sierra user **permissions** matching the old Millennium passwords and authorizations, but not much else apart from some defaults
  + Migrated Millennium *logins* have Sierra user parameters matching the old login parameters (location served, scope, settings, preferences etc.), but no permissions
  + No migrated users have Applications or Workflows assigned
* [Administering users](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users.html) – adding, editing, deleting; changing password
  + [Basic info](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users_basic_info.html)
    - [Sierra Users](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_users.html)
      * Standard Sierra users
      * SDA context users (optional feature)
    - [Locations served](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_admin_corner_loc_served2.html) (A > A > L > S)
    - [Statistic group](http://documentation.iii.com/sierrahelp/Default.htm#sril_circ_param_statname.html) (Sierra Desktop Application - Admin | Parameters | Circulation | Statistical Group Maintenance)
    - [Password policies](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_desktop_passpolicy.html) (A > A > S > O > D > Login: Enable Password Policies) (Sierra Desktop Application - Admin | Parameters | Security | Password Policies)
  + [Applications](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users_applications.html)
  + [Permissions](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users_permissions.html)
    - [Permissions used by Sierra](http://documentation.iii.com/sierrahelp/Default.htm#sril_auth.html) (new: permissions in the 1000+ range)
  + [Workflows](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users_workflows.html)
  + [Options](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users_options.html)
  + [Settings](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users_settings.html)
    - [What must I do to make my imported macros work in Sierra?](https://documentation.iii.com/sierra/kb/article.php?cat_id=21&art_id=23) (Sierra Knowledge Base article)
  + [Preferences](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_users_preferences.html)
    - [Changing the colors](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_prefs_colors.html) / [Changing the font](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_prefs_font.html) (customize the default colors and font for various user interface elements, besides the editor – only available from SDA/Web)
  + Import settings
* [Administering global parameters](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_global.html)
  + [Global applications](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_global_applications.html)
  + [Global permissions](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_global_permissions.html)
  + [Global workflows](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_useraccts_auths_global_workflows.html)
  + [Global user groups](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_useraccts_auths_global_user_groups.html) (note group “Initials” for old Millennium user initials)

# Other functions of general interest

* Backend Management
  + [AWS](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_backend_aws.html) (Advanced Word Searching = keyword index rules)
  + [System files](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_backend_sysfiles.html) *[not available during preview]*
    - System Messages\*
    - Circulation Overrides\*
    - Autonotices Log\*
    - SUSHI Harvest Log [optional product]
    - Patron Suggestions\*
    - Additional Items to Acquire\*
    - Indexrules\*
    - Keyword Synonyms\*
    - Link Maintenance Report\*\*
    - [Admin Corner](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_admin_corner.html) setup (discussion only)
  + [Review file maintenance](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_backend_revfiles.html)\*
    - Previously available only to customers with ASAA, and edited differently
  + Sierra Facets ([Customizing Facet Display Settings](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_backend_facets.html))
* Other Web Applications
  + [Scheduler](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_other_webapps_scheduler.html)\*\*

## What has moved?

* To the Admin App from character based: functions marked \*
* To the Admin App from Millennium client: functions marked \*\*

# Supporting documentation

* [Sierra documentation](https://documentation.iii.com/sierrahelp/Default.php)
* [Sierra Knowledge Base](https://csdirect.iii.com/sierra/kb/index.php?cat_id=9998&tag_id=40)
  + [Content Tagged: Migrating](https://csdirect.iii.com/sierra/kb/index.php?cat_id=9998&tag_id=40)

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