

Worksheet:

Setup Steps in Magaya Software

This worksheet is designed for professors who are entering their student's names in Magaya software. **The steps in this worksheet MUST be done first**, before you do anything else in the software. You will also create your Instructor Division.

It explains:

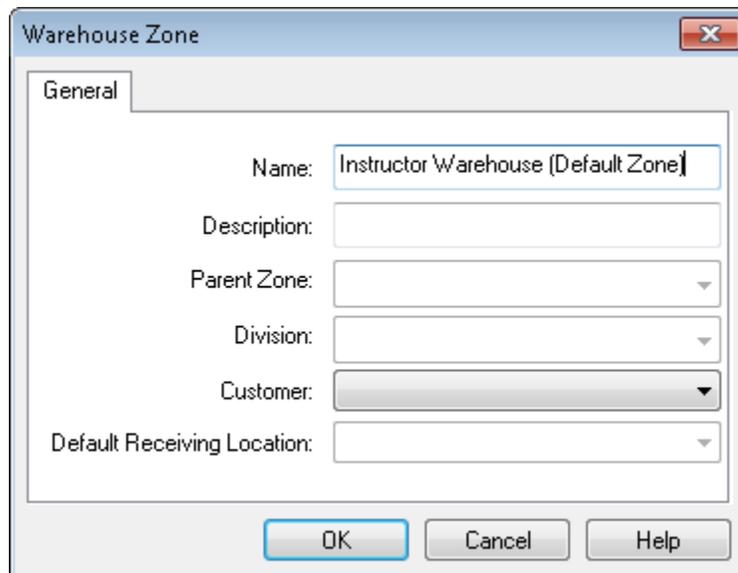
- how to create a Division for each student and yourself, how to enter the students in the system and assign them to a division, and set permissions
- how to set up the outgoing shipments folder
- load Schedule B codes

The result of this setup: This will configure each student's view of the system so that they only see their work while you will see all their work.

Your Setup and View of the System:

Your view of the system will be as an Administrator. You will see all the transactions by students. When you first install Magaya, your warehouse is called the "Default Zone."

Change the name of your warehouse by going to Warehousing > Locations. Click Actions and select Warehouse Zones. Double-click the Default Zone to open the dialog box. Rename the Default Zone to "Instructor Warehouse" (Default Zone) or other name. Leave all the other fields as is. Click OK to save.



The screenshot shows a dialog box titled "Warehouse Zone" with a close button in the top right corner. The dialog box has a "General" tab selected. Inside the dialog, there are several input fields and dropdown menus:

- Name:** A text box containing "Instructor Warehouse (Default Zone)".
- Description:** An empty text box.
- Parent Zone:** A dropdown menu.
- Division:** A dropdown menu.
- Customer:** A dropdown menu.
- Default Receiving Location:** A dropdown menu.

At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Help".

Next, you need to create a Division for yourself so you can use it to set up the zones and locations inside your warehouse.

Create a Division Name called “Instructor”:

This will be used by you to create your own transactions or ones that you want all students to see and access. Leave the other fields blank.

The screenshot shows a software window titled "Division". It has three tabs: "Division", "Address", and "US Customs Codes". The "Division" tab is selected. The form contains the following fields and options:

- Division Name: Instructor's Division
- Phone: [Empty text box]
- Fax: [Empty text box]
- EMail: [Empty text box]
- Default Company: [Dropdown menu]
- Use this division in document headers
- Assign this division to entities created by its employees
- Comments: [Empty text area]

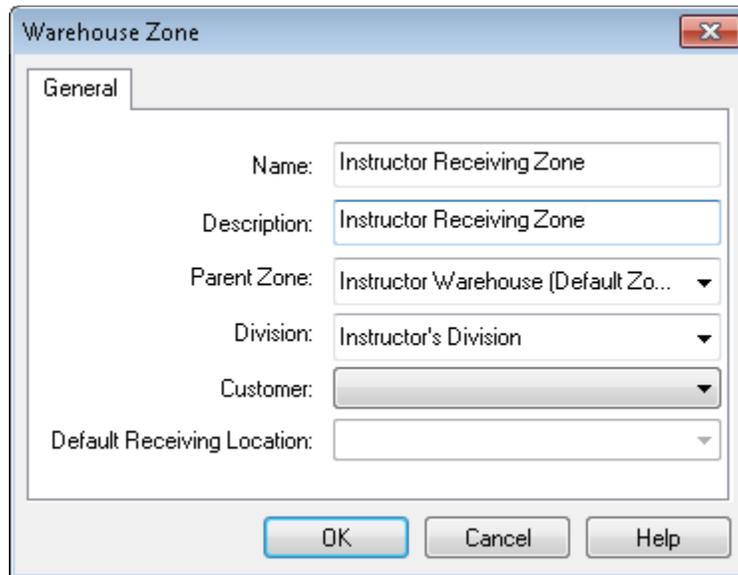
Create “Instructor” in Employee List:

Go to Maintenance > Employees. Create an employee called “Instructor”. On the User tab, select the “Instructor” division.

IMPORTANT: Do **not** checkmark the box on the User tab that would only make the transactions viewable for this division. You need to see all divisions.

On the Permissions tab, click the “Add” button to select the “Administrator” group. This will give you all the permissions.

Add your Warehouse Zones and Locations:



The screenshot shows a dialog box titled "Warehouse Zone" with a close button (X) in the top right corner. The dialog has a "General" tab selected. Inside the dialog, there are several fields and dropdown menus:

- Name: Instructor Receiving Zone
- Description: Instructor Receiving Zone
- Parent Zone: Instructor Warehouse (Default Zo... (dropdown)
- Division: Instructor's Division (dropdown)
- Customer: (dropdown)
- Default Receiving Location: (dropdown)

At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

Create your zones for receiving, shipping, storage, QA and assign them each to the Parent Zone of your Instructor Warehouse and to your Division. You can create as many zones as you want for yourself, or follow the assignment you give your students.

Create your Locations and assign them to your warehouse and division. Create them according to the assignment.

View your Warehouse Inspector to view the changes. *Hint for later:* After you set up the students, you will log in as one of the students to see their view of the system.

Resource: There is a Magaya Knowledgebase with topics to create zones and locations if needed:

<http://knowledge.magaya.com>

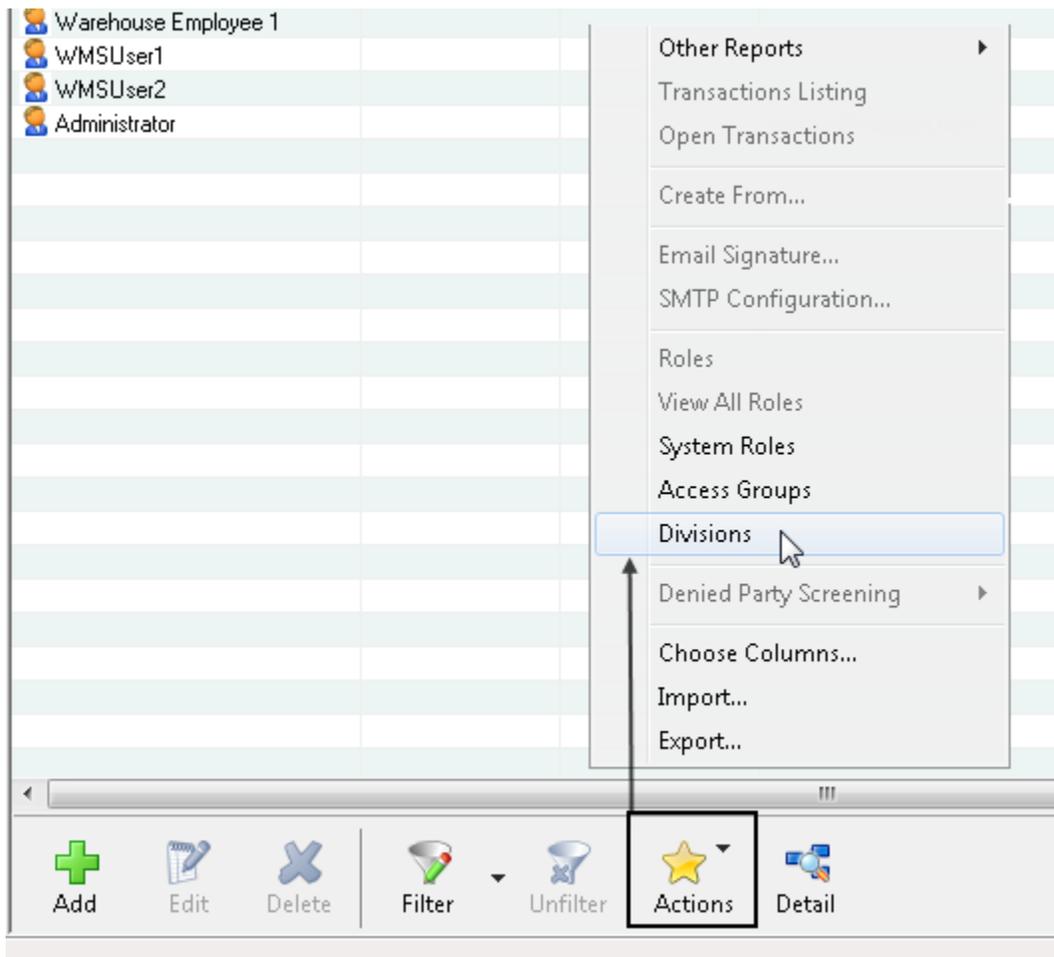
Setup the System for Students:

1. Create One Division per Student:

Note: You can import the Excel list of Divisions to see examples or create your own. (Import via the Actions button in the Employee list.)

Each student **must** have their own division. This will limit their view of the system so they only see their work.

Go to Maintenance > Employees, click the Actions button, and select “Divisions”.



In the “Divisions” list, click the Add button to create a new Division. The purpose of creating a Division for **each** student is to ensure the student can see their work only. (You as an Administrator in the Magaya system will be able to see all their work.) Enter the following details in the dialog box:

Make a Division name for each student in your class. Names can be “Student 1 Division”, “Student 2 Division”, etc. or other naming convention that suits you such as “01Student”.

Make sure the following options are checked:

The screenshot shows a 'Division' dialog box with the following fields and options:

- Division Name: Student 1 Divison
- Phone: [Empty]
- Fax: [Empty]
- EMail: [Empty]
- Default Company: [Dropdown]
- Use this division in document headers
- Assign this division to entities created by its employees
- Comments: [Empty]

Check the following boxes:

- “Use this division in document headers” so that the student’s name appears on the top of every document they create such as Pickup Orders and Warehouse Receipts.
- “Assign this division to entities created by this employee”. This ensures the student sees their customer and carrier names in the system. **This is required.**

Click the OK button to save.

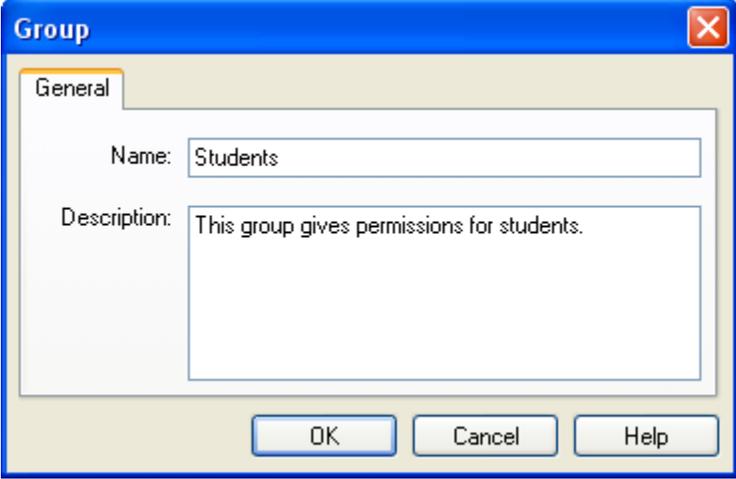
Make one for each student.

2. Enter Student's Names, Set Password and Permissions:

Add Group called "Students":

Go to the Employees list, click the Actions button, and select Access Groups.

Click the Add button and create a group called "Students".



The image shows a screenshot of a software dialog box titled "Group". The dialog box has a blue title bar with a close button (X) in the top right corner. Below the title bar, there is a tab labeled "General". The main area of the dialog box contains two text input fields. The first field is labeled "Name:" and contains the text "Students". The second field is labeled "Description:" and contains the text "This group gives permissions for students.". At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Help".

Click OK to save.

Close the Group List.

Add Student Names:

This step can be done manually or by importing a list of names. If you have your students' names in a spreadsheet, you can import them. If you don't, then you can manually enter them, or import the generic list from Magaya, and then add as many more student profiles as needed.

Go to the Employee List, click the "Add" button, and enter the following in the dialog box:

- **On the General tab**, enter the student's actual name or create a generic naming convention such as "Student 1", "Student 2", "Student 3", etc. for as many students in your class. *Tip:* A generic naming convention is often easier to manage.

Option: If there are many students, import the list of names via the Actions button in the Employee list. Select the columns: Name, Division, and Email. **If** you choose this method to import names, you **must** open each student name in the list and set the password for each student and set their division.

Enter an email address (optional) if your students will email documents for their assignments from the Magaya system to you. This is useful if the class uses Blackboard or another online teaching program. Discuss the email function with your school IT manager to ensure it will work.

- **Click the User tab.** Enter a password. This could be their university ID number or other number they will remember. They do not have permissions to change their password. Only you have Administrative access to change passwords.

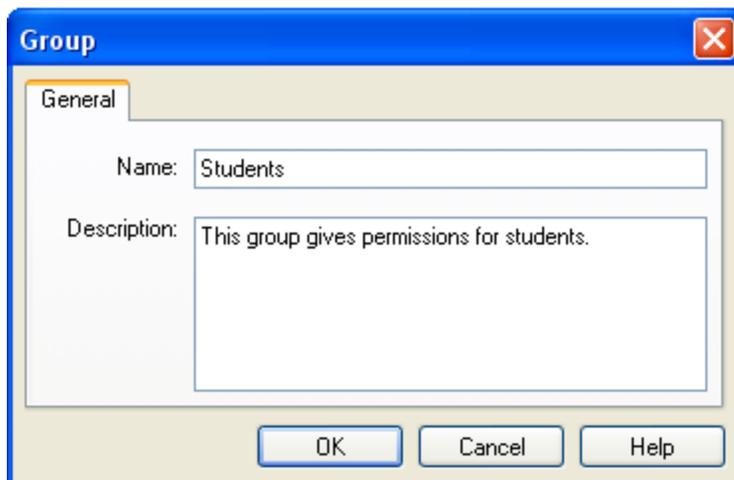
The screenshot shows the 'Employee' window with the 'User' tab selected. The 'User' tab is highlighted with a box and an arrow. The 'Can only see transactions from this division' checkbox is checked and highlighted with a red arrow and a callout box that says 'This must be checked.' Other checkboxes include 'Allow Magaya OnTheGo access', 'Allow Magaya Network access', 'Allow Magaya Software API access', 'Allow Magaya WMS Mobile access', 'Allow Magaya POD Mobile access', and 'Disable access for this employee'.

- Passwords must be a minimum of 6 digits (letters and/or numbers).
- Select the Division for that student.
- Check the box “Can only see transactions from this division”. **This is required.**
- Click OK to save.

Note: By default a checkmark is placed in the “Allow Magaya Network access” option. The other checkboxes are not needed.

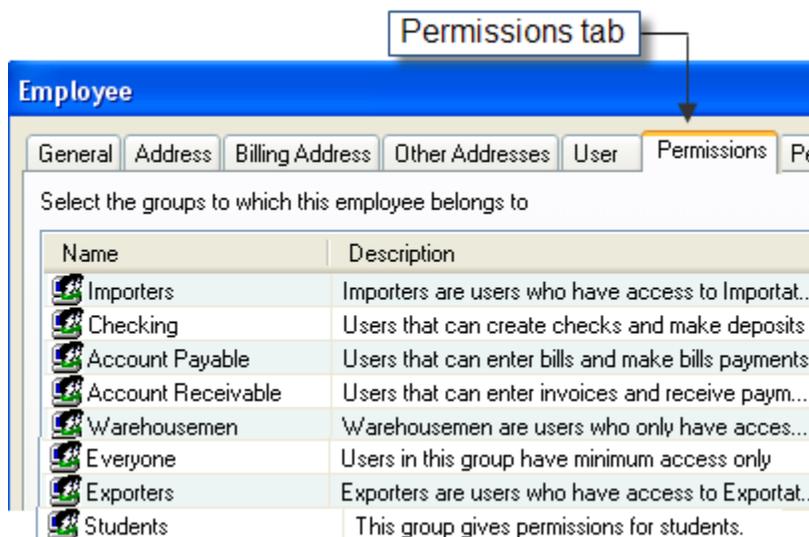
In the Employees list, click “Actions” and select “Access Groups”.

Create a group called “Students”.



Open each student's profile: On the **Permissions** tab, set the Permissions for each student by following these steps:

Click the "Add" button and select the all the permission groups from the list, including Students but **exclude** Administrators and Accountants.



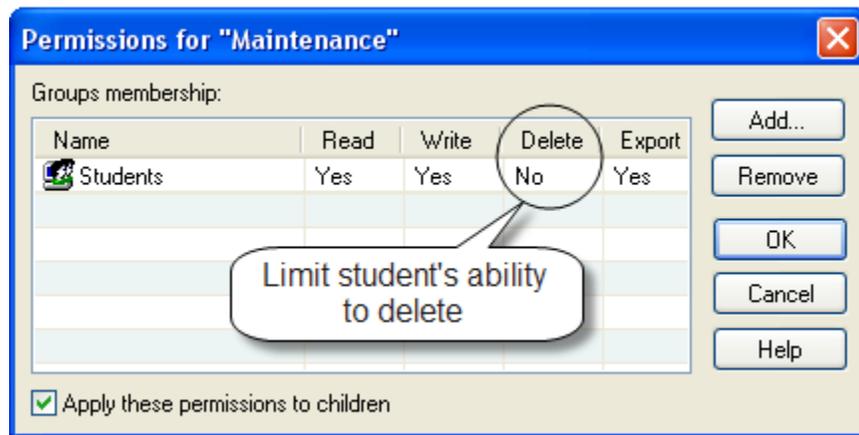
Click "OK" to save.

Now add the Student group to each folder in the Magaya system by highlighting the folder, starting with "Tasks" and then click "File" and select "Permissions" from the menu.

In the Permissions dialog box, click the Add button to add the Student group. Remove the others.

Click in the "Delete" column for Students to change Yes to No.

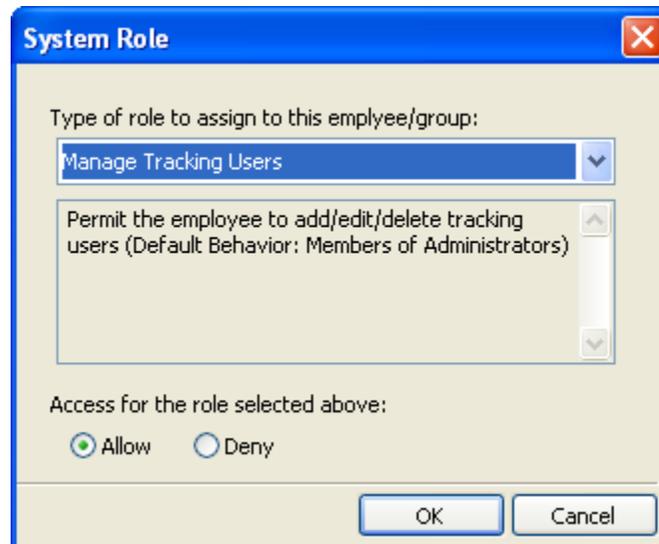
Check the box to “Apply these permissions to children” which will apply this rule to all the subfolders.



4. Enable Tracking Permission:

In the Employees list, click on a student name to highlight it. Click Actions > Roles.

In that list, click the Add button. In the dialog box that opens, select: Manage Tracking Users:



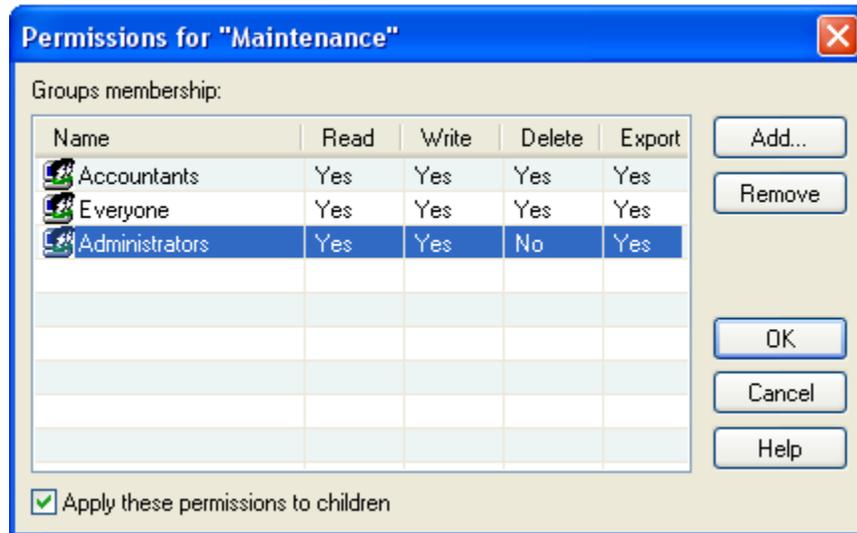
Do this step for each student.

5. Limit Permissions for Students Further:

Click on the Maintenance folder. Click File > Permissions.

In the dialog box, add the Students group. Then select it to highlight it. Click in the “Delete” column to change from Yes to No.

Check the box to apply the permissions to children, which will apply the permissions to all the subfolders under Maintenance. This will limit the students’ ability to delete things in the system.

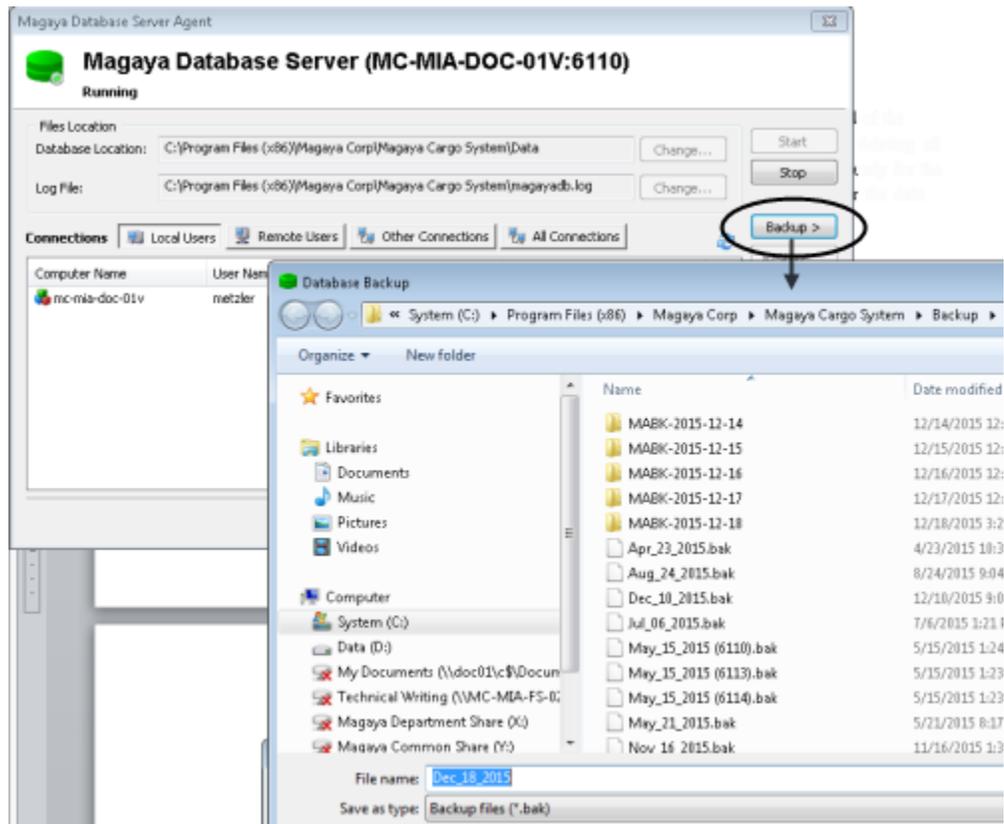


6. Save a Backup of your System now:

Save this information in your system. This is the “restore” file you will use at the end of the semester after you save all the students’ assignments. You will clean the database by deleting all the data, and then reload this first backup file into the clean database so you will be ready for the next semester. The generic student list will be uploaded, so you don’t have to re-enter the data.

Make a note of the name, date and location of this backup file so you can use it later.

See the Magaya Knowledgebase or Chapter 8 of the *Magaya Software Customization Manual* for database administrator tasks.



To pair the student's name with the generic list, enter their real name in the "Entity ID" field. (Note: You can use your own Excel list, etc. if you prefer to keep student names and Magaya student numbers.)

Employee

General Address Billing Address Other Addresses User Permissions Personal Info Attachments

Name: Student 12

Entity ID: Joe Smith

Phone: [] []

Fax: []

EMail: student12@schoolname.edu

Identification Number: [] Other

Inactive

MAGAYA TIP

OK Cancel Help

Result: When the student logs in, they will see their name next to the number:

Login to Magaya Explorer

HWC Cargo Company

Employee: []

Password: []

Operations Staff 1

POD User1

Student 1

Student 12 <Joe Smith>

Student 13 <Eddie Jones>

Student 2

Test employee

Warehouse Employee 1

WMSUser1

WMSUser2

In the Employees list, click “Actions” and select “Choose Columns”. Select the column “Entity ID.” Click OK to save. Move the column to a location you want to make it easy to see student names.

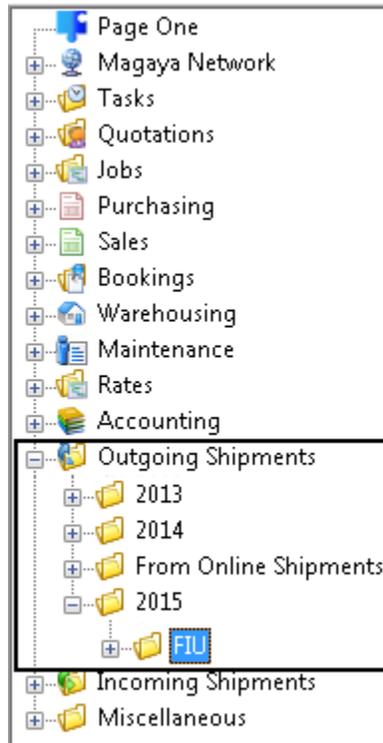
Employees		
Employees		
Name	Entity ID	Phone
Student 12	Joe Smith	
Student 13	Eddie Jones	
Houston WH Manager		

7. Set up Outgoing Shipments Folders

Set up a folder to save all the export and import shipments that students create.

Right-click the “Outgoing Shipments” folder, and select “Add Folder”. This is where students will save the export shipment transactions.

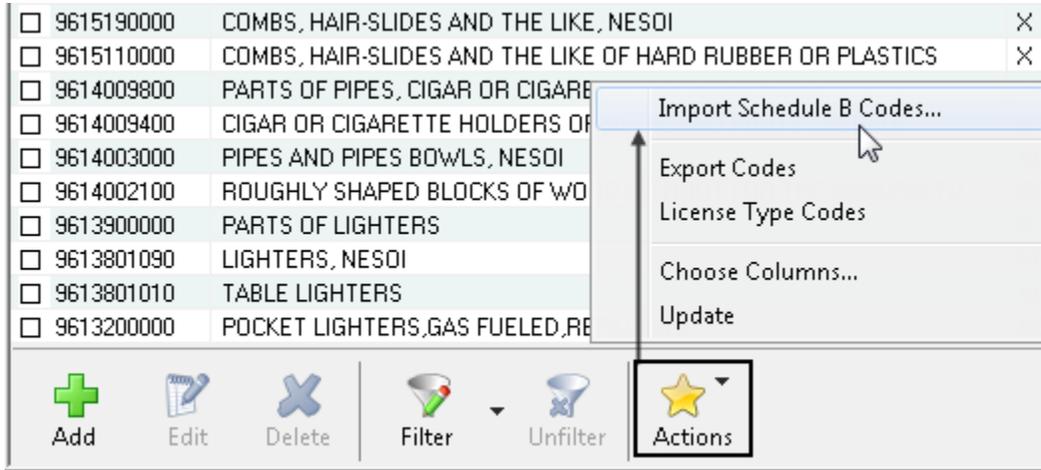
Enter the folder naming convention you want to use. For example, you can create the first folder as the year. Right-click that folder to create subfolders below it such as the course number.



If creating Import Shipments: Copy the folder structure and paste it into the “Incoming Shipments” folder. This is where students will save the incoming shipment transactions.

8. Load Schedule B Codes:

Expand the Warehousing folder > go to Commodity Classifications > click Actions > Import Schedule B codes:



9. Configure Document Numbers:

Go to Maintenance > Configuration > Document Numbers

Click the “Set” button for each transaction shown:

Document Numbers			
<input checked="" type="checkbox"/> Quotations	<input type="button" value="Set..."/>	<input checked="" type="checkbox"/> Trips	<input type="button" value="Set..."/>
<input checked="" type="checkbox"/> Pickup Orders	<input type="button" value="Set..."/>	<input checked="" type="checkbox"/> Jobs	<input type="button" value="Set..."/>
<input checked="" type="checkbox"/> Warehouse Receipts	<input type="button" value="Set..."/>	<input checked="" type="checkbox"/> Purchase Orders	<input type="button" value="Set..."/>
<input checked="" type="checkbox"/> Cargo Releases	<input type="button" value="Set..."/>	<input checked="" type="checkbox"/> Sales Orders	<input type="button" value="Set..."/>
<input checked="" type="checkbox"/> Cargo Movement	<input type="button" value="Set..."/>	<input checked="" type="checkbox"/> Bookings	<input type="button" value="Set..."/>

Check the box “Do not allow duplicate numbers”:

Document Number

Numbers Format

Prefix:

Suffix:

Start number at:

The created numbers have the following format:
[Prefix]Number[Suffix]

Do not allow duplicated numbers

OK
Cancel
Help

Note: After you complete these steps, you can create one student’s warehouse zones and locations to test their view of the system and yours.

If you have any questions, please contact Magaya Tech Support: (786) 845-9150.

Thank you.