MAGELLAN 2
ASIA ELT USER GUIDE

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SYSTEMS & TECHNICAL SUPPORT CONSULTANT

NATIONAL GEOGRAPHIC LEARNING

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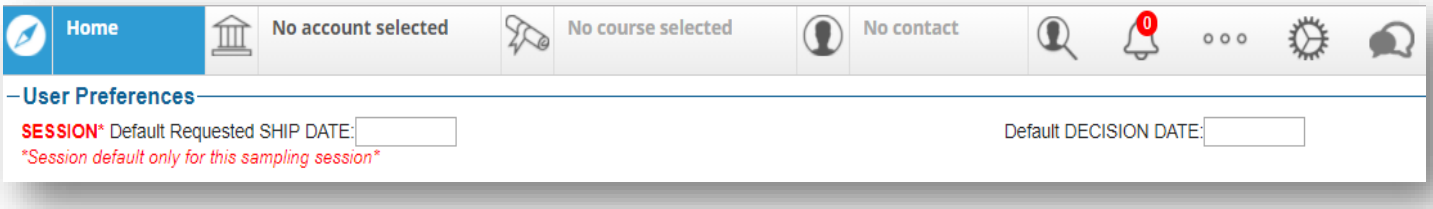
Views, Bars & Headers

There are three (3) groups of Magellan views:

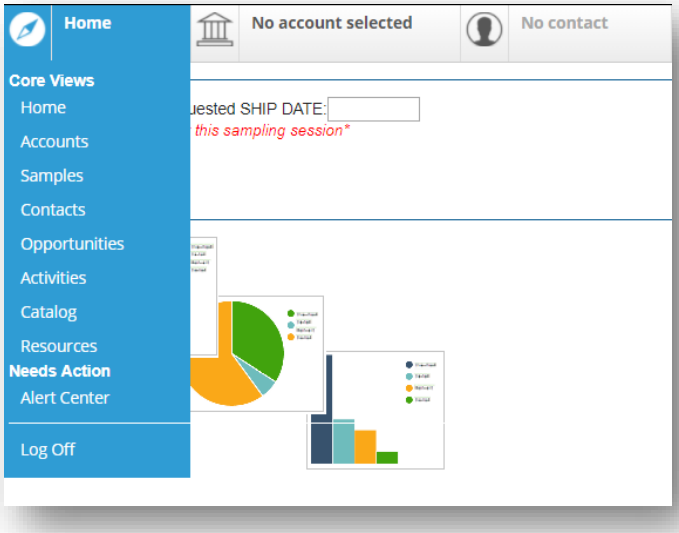
View	Description
Core	A collection of views that represent information shared across the user's territory. For example, a list of all accounts, or all samples regardless of account association.
Account	A collection of views specific to the selected account.
Contact	A collection of views specific to the selected contact.

Core Views

Initially the Core view is labeled '**Home'**, however once a core view is selected the button label will change to better describe what is being displayed.



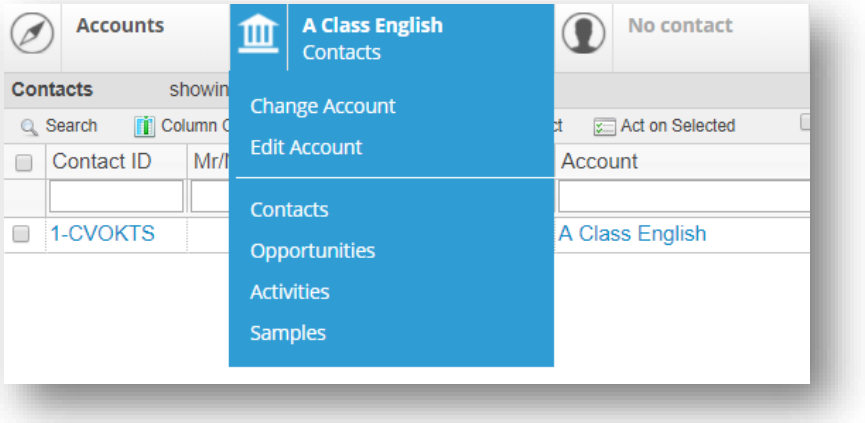
Once your mouse is positioned over the button an expanded list of views is presented: -



- **Accounts** – List of Accounts associated with the User.
- **Samples** – Presents a Search bar for Users Sample history.
- **Contacts** – List of Contacts associated with the Users Accounts.
- **Opportunities** – List of Opportunities associated with the User.
- **Catalog** – Takes the User through to the NGL Catalog

Account Views

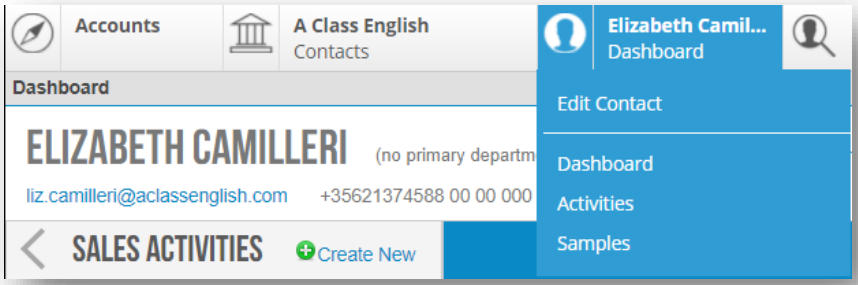
Additional account views may be available by hovering the cursor over on the left-hand side of the Accounts tab…



- **Change Account** – This returns the User to their list of Accounts to select a new one.
- **Edit Account** – This takes the User through to the Edit Account screen. Please note, Sales Reps can only change the Key Account flag within this screen.
- **Contacts** – List of Contacts associated with the Accounts.
- **Opportunities** – List of Opportunities associated with the Account.
- **Samples** – List of Samples relating to the Account.

Contact Views

Additional account views may be available by hovering the cursor over on the left-hand side of the Contacts tab…

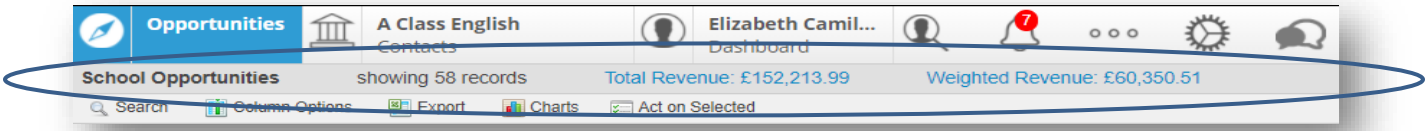


- **Edit Contact** – This takes the User through to the Edit Contact screen.
- **Dashboard** – Takes you back to the Contact Dashboard.
- **Samples** – List of Samples raised against the Contact.

BARS

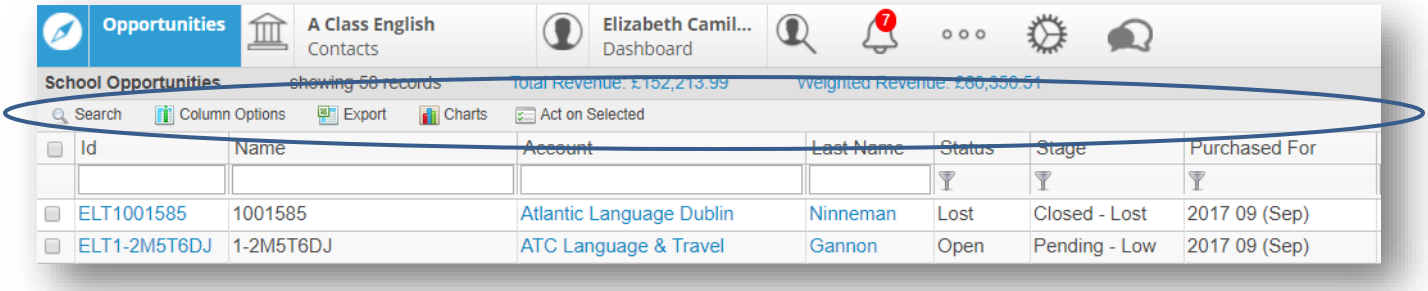
Summary Bar

The appearance of the summary bar will vary depending on the view selected. For example, when the Opportunities view is selected a summary of total revenue and weighted revenue appears. As filters are applied the value in the summary bar will adjust to reflect the filtered data.



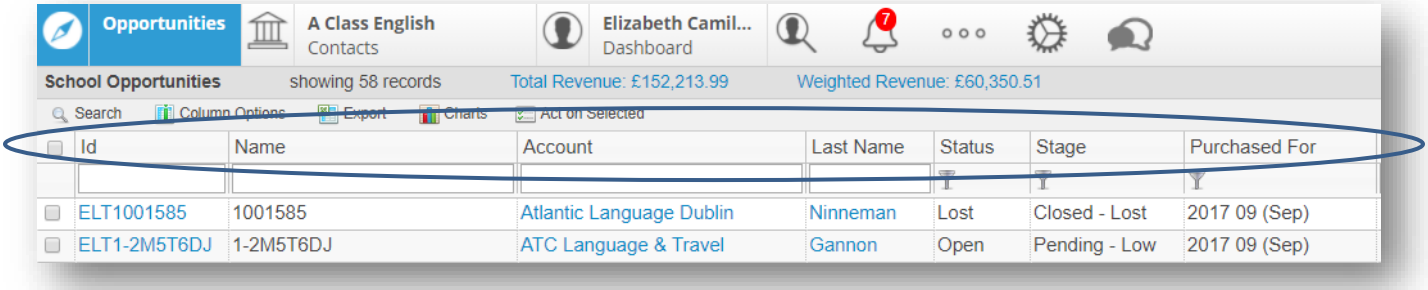
Action Bar

Frequent tasks such as searching and column adjustments can be completed in the Action Bar. If there are tasks specific to a view (like creating a new Contact record in the Contact view) then appropriate actions will be listed to the right of the Column Options action.



HEADERS

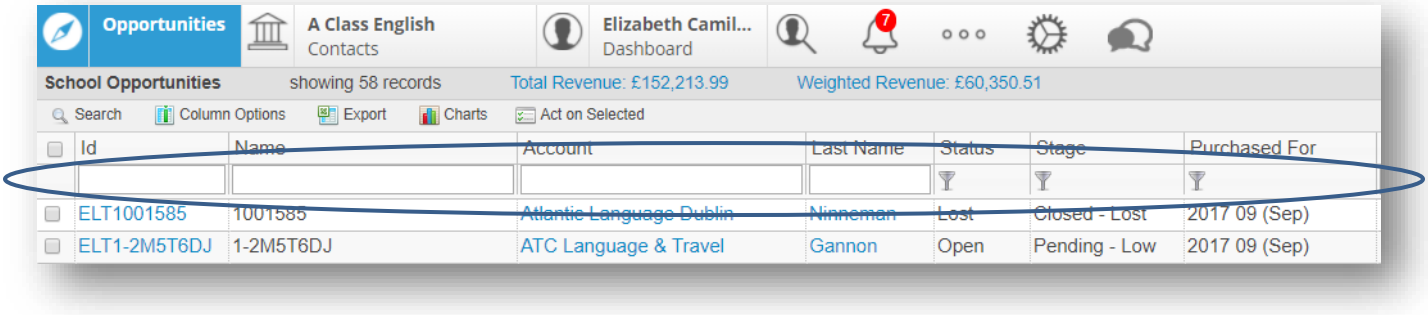
Column Headers



The column headers not only label the columns of data but, when clicked, will allow you to execute basic sort ascending and descending commands. If you see a blue triangle to the immediate right of any column label, then you know that this column is currently sorted. An arrow pointing down represents a descending sort and an arrow pointing up represents an ascending sort.

Like other software programs, the column header can also be used when adjusting column order by using the click and drag method.

Filter Bar



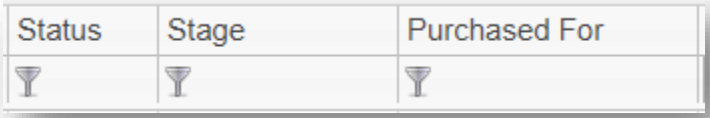
Filtering takes an existing full list, and removes items based on criteria that match/don't match. You are starting with results and then subtracting. For example, you may have a full list of Opportunities and you apply a filter to only show those that are in an Open stage so you can see only those opportunities you need to actively work with.

Common filter criteria include:

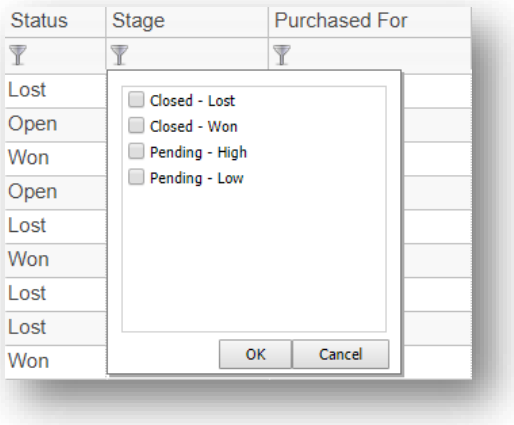
Criteria	Use
=	Equal to
<	Less than
>	Greater than
<>	Not equal to
<=	Less than or equal to
>=	Greater than or equal to
IS NULL	Searches for blank fields
IS NOT NULL	Searches for nonblank fields

Multi-Value Filter

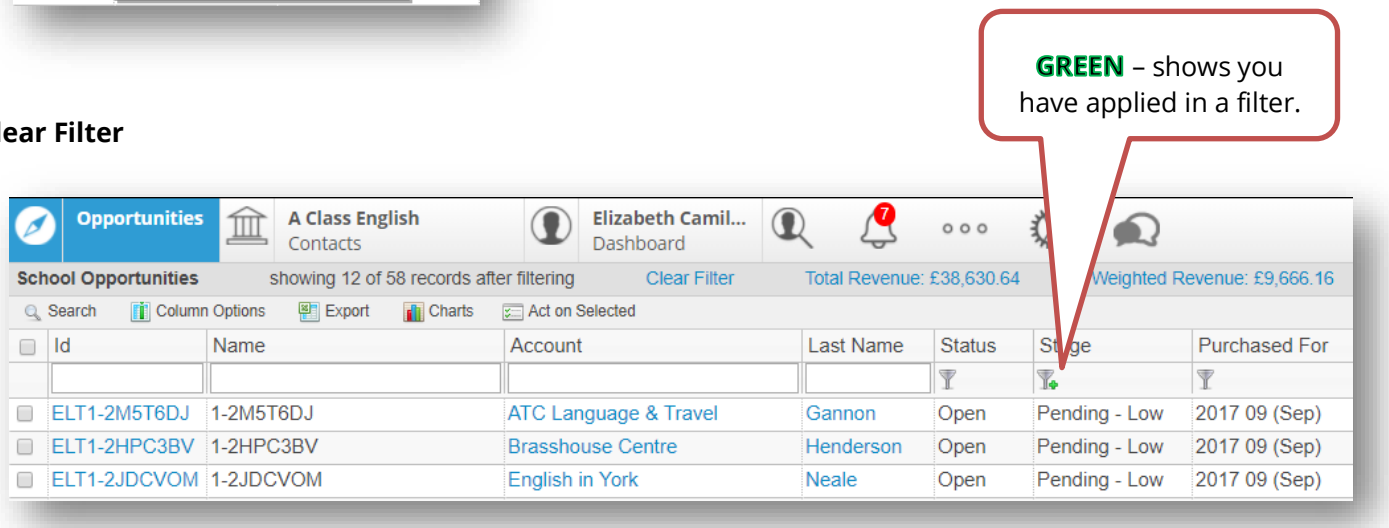
The funnel icon (pictured below) represents a field that can contain multiple values.



Once selected, you will see all of the options available for the selected field. Each will have different choices. Use the check boxes to select one or more values and then click 'OK' to apply the filter.



Clear Filter

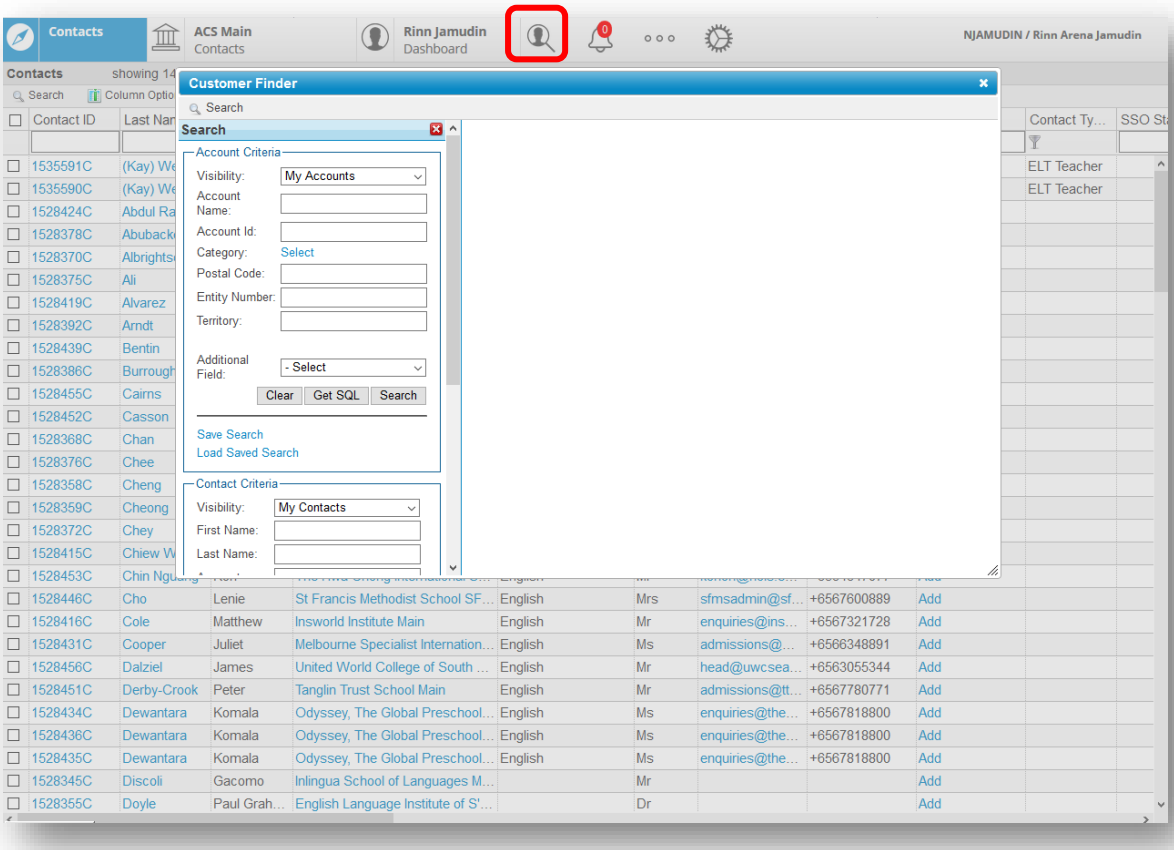


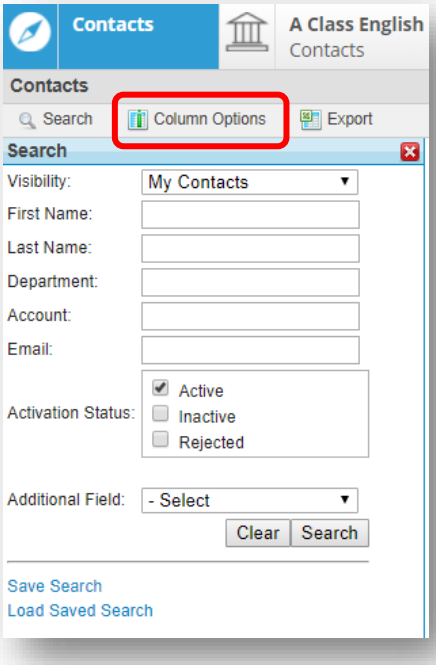
The 'Clear Filter' command is located in the Summary Bar. Although it is easy to manually delete the values you have applied in a filter, you may have applied a more complex filter and use of the Clear Filter function ensures that every column filter has been removed. Additionally, it can be handy to determine, at a glance, whether a filter has been applied to a list.

Search

Search takes a blank slate and adds to it based on criteria that match/don't match. You are starting with no results and displaying only relevant ones. For example, you want to find a contact but are not sure if the spelling of the contact's first name is 'Carl' or 'Karl'. In a search you can input 'Carl or Karl' as your criteria and get results such as 'Karl', 'Carl', 'Carla', 'Karla', and 'Carlton'.

- Search fields will vary depending on the view you are searching on.
- Search criteria is not case-sensitive.
- Search criteria is held until a new search is performed or the 'Clear' button is selected.
- Searches you execute frequently can be saved for future use.

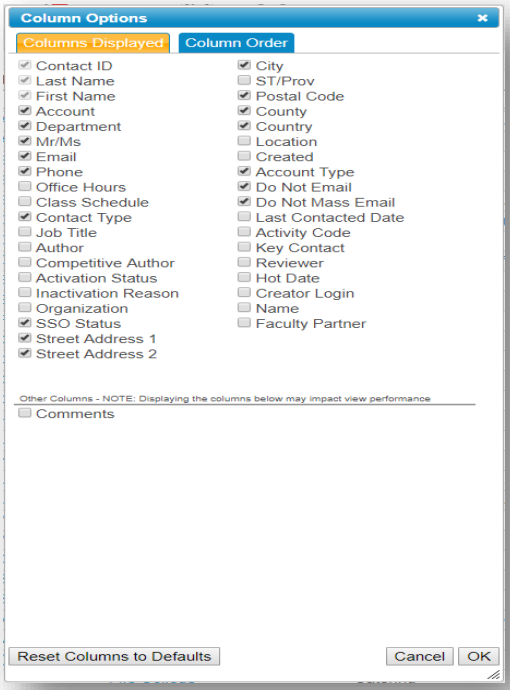


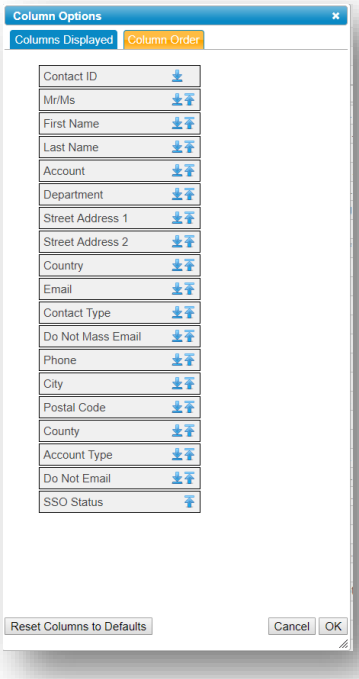


Column Options

You can add, remove, and rearrange columns in a list to suit your preferences. Your changes are saved permanently. The 'Column Options' command is only located in the Action Bar.

Those columns with a check box that appears grey and cannot be selected are columns that are required in the view you have selected.





Click	To
	Move the selected column to the top of the list.
	Move the selected column up/down one position in the list.
	Move the selected column to the bottom of the list.

Adjust Columns Displayed

1. Navigate to the list you want to adjust columns on.
2. Click the '**Column Order**' command on the Action Bar.
3. Adjust the columns as necessary.
4. Click the '**OK**' command button.

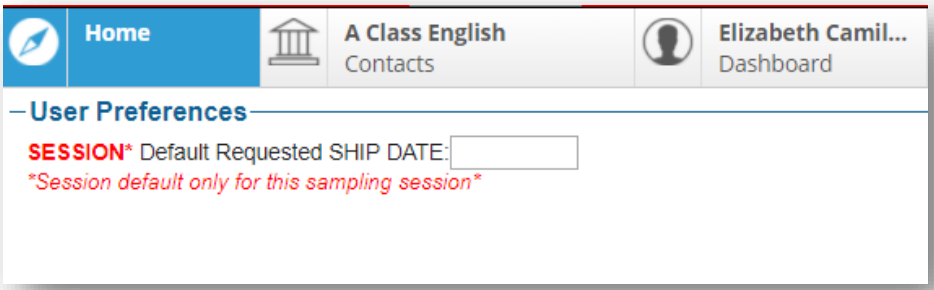
Full Screen Visibility

In order to maximize the Magellan screen, **press the F11 key** on your keyboard. You will only see the Magellan application; other Chrome features will disappear from view. In order to return to the standard Chrome view you will have **to press the F11 key again**.

Home View

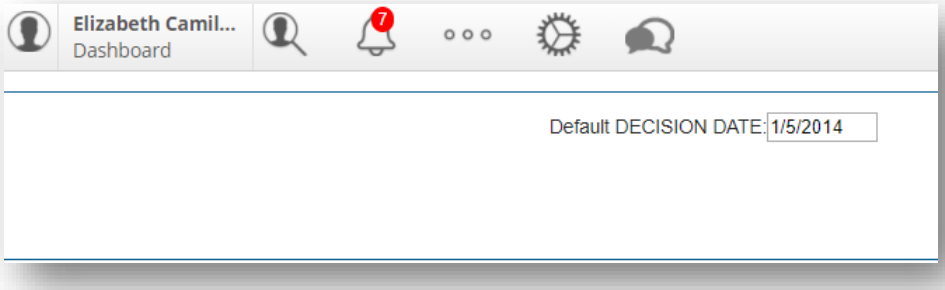
Default Ship Date

The Default Requested Ship Date is adjusted on the Core Home View. This value is only valid for the current sampling session. Once you close the Chrome window the value is deleted, and you will have to re-enter the date when you next login to Magellan. Completing this field is not required; rather offered as a convenience.



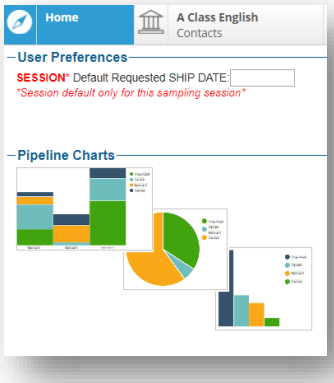
Default Decision Date

The default Decision Date is adjusted on the Core Home View. This field value is maintained from session to session. Be sure to adjust this value as appropriate.



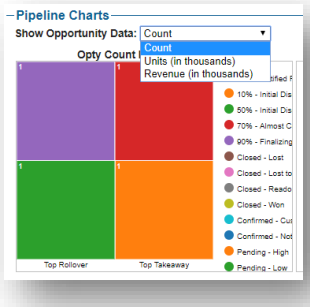
Pipeline Charts

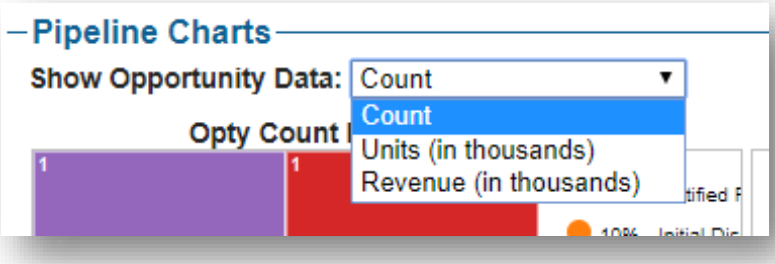
The pipeline charts available on the Core Home View allow the user to see **opportunity data** across their territory in a graphical format.



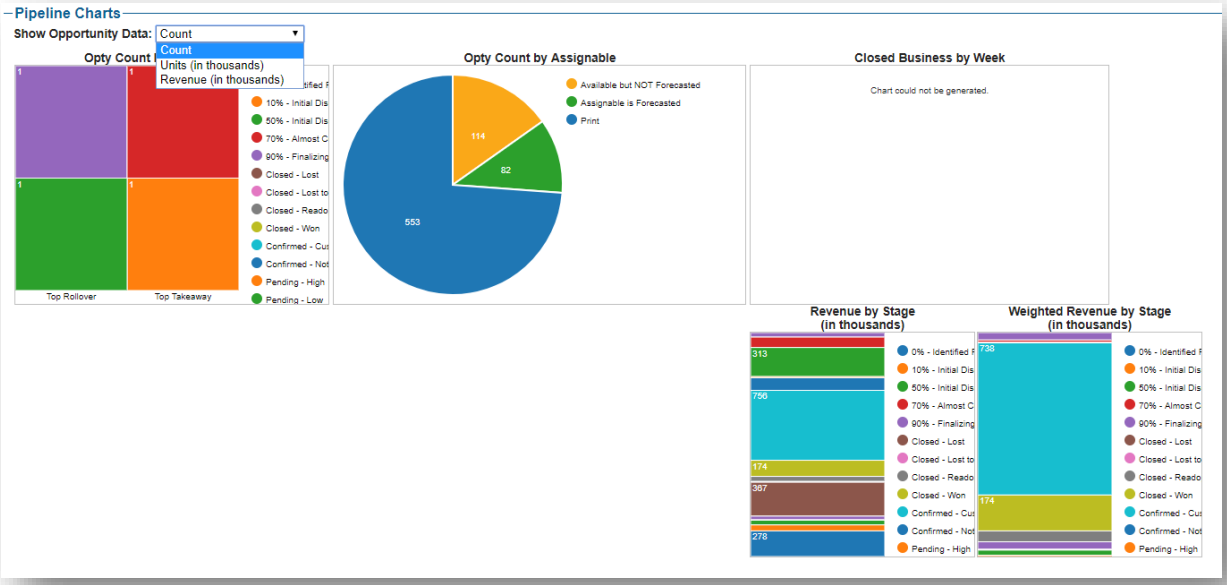
If you click anywhere on the charts that appear, more details are displayed. The drop-down list box at the top of the charts section allows you to view data by:

- Opportunity Count (default view)
- Units (in thousands)
- Revenue (in thousands)





This view is not interactive; simply informational. In order to utilize an interactive pipeline chart you must select an account and its opportunity view or select the Opportunity Core View.

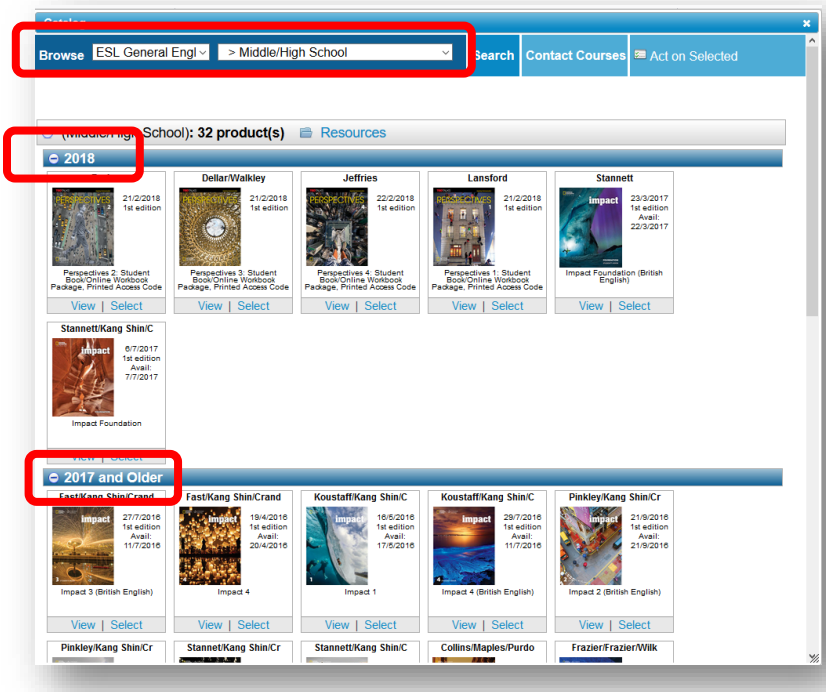


Catalog

The catalog provides two different ways to view products; Browse, Search, Contact Courses.

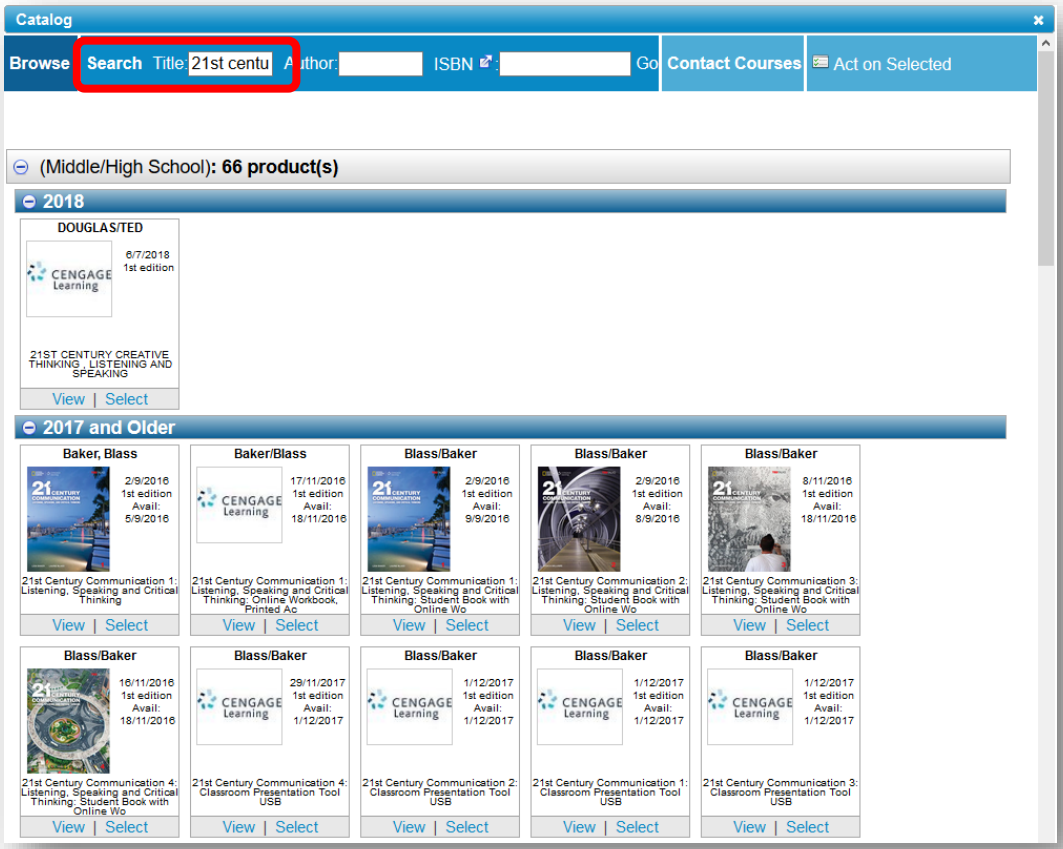
Browse

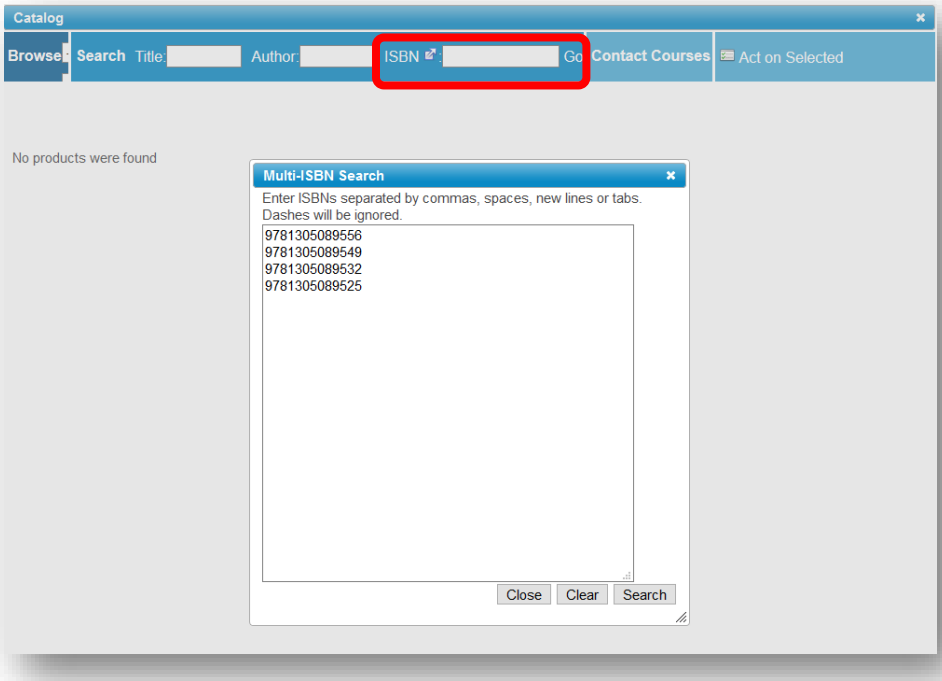
Selecting a Discipline and Course is the first step to viewing products. All products that meet your selected criteria are displayed at the bottom of the catalog.



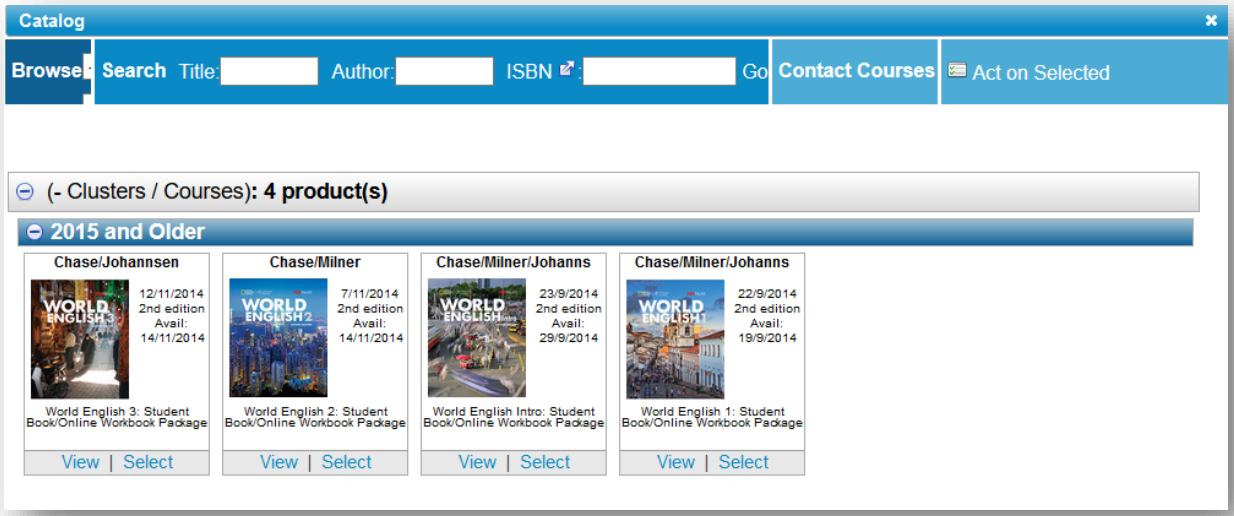
Search

If you are interested in searching for a particular Author, Title or ISBN (or even just part) your search results will appear at the bottom of the pop-up grouped by copyright year.





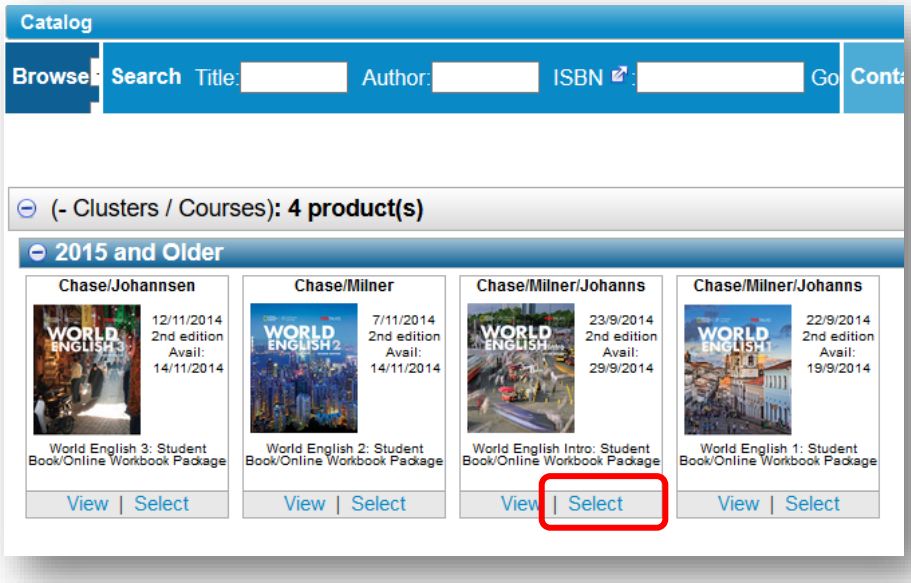
The result by ISBN filter.



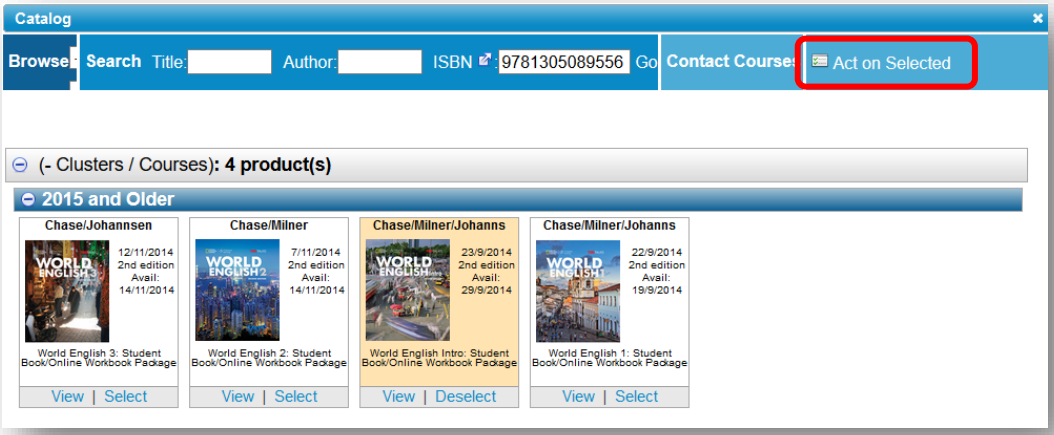
Act on Selected

Any product can be 'opened' so that product detail is available in its own pop-up window. However, there is a 'Select' link on every product. Once selected, the link is renamed to 'Unselect'. The purpose of this link is to allow you to select multiple products (without using the Ctrl or Select keys on your keyboard) and perform an action based on your selection.

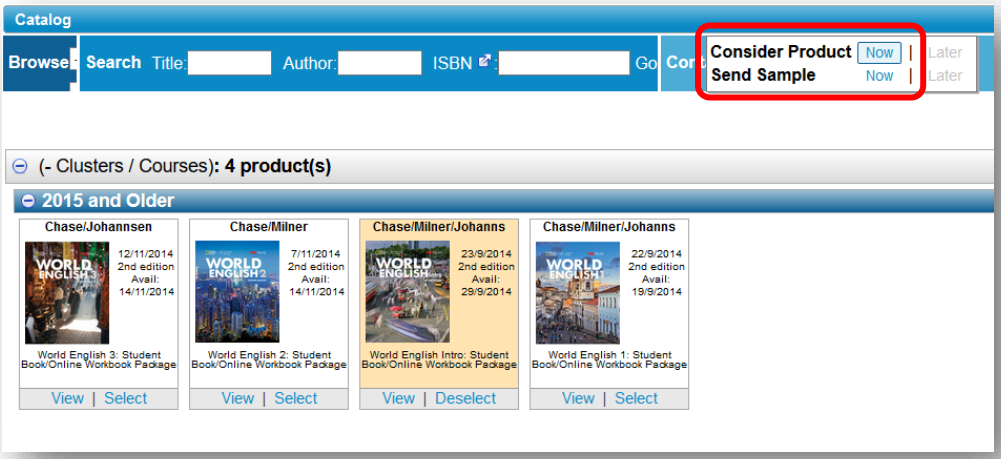
1. From the contact dashboard, select the '**Catalog'** Contact View.
2. Use the '**Select**' links to select one or more products.



3. Click the '**Act on Selected**' option.

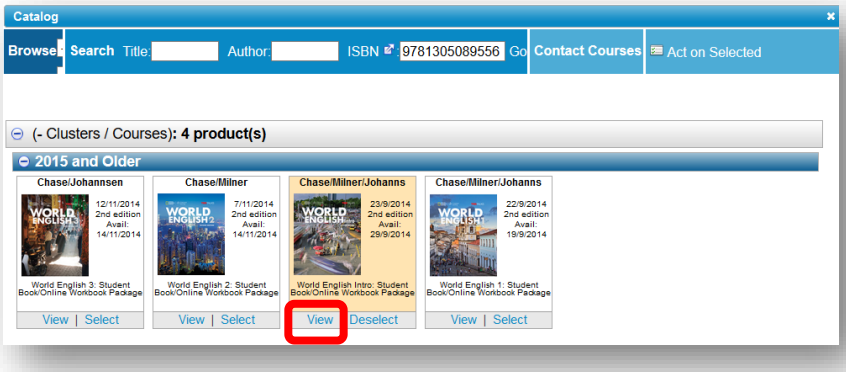


4. Click the '**Now**' link to either create a new opportunity or sample.

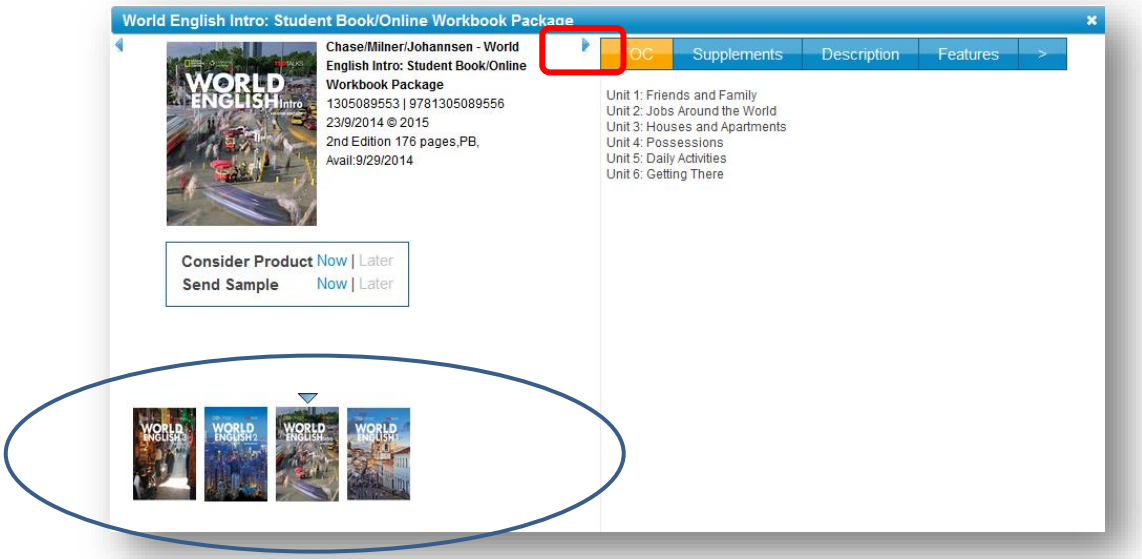


Product Navigation

Click ***View*** to open to the product details. There are two (2) ways to do so. You can click the arrow located to the immediate left of the TOC header to proceed to the next course product:

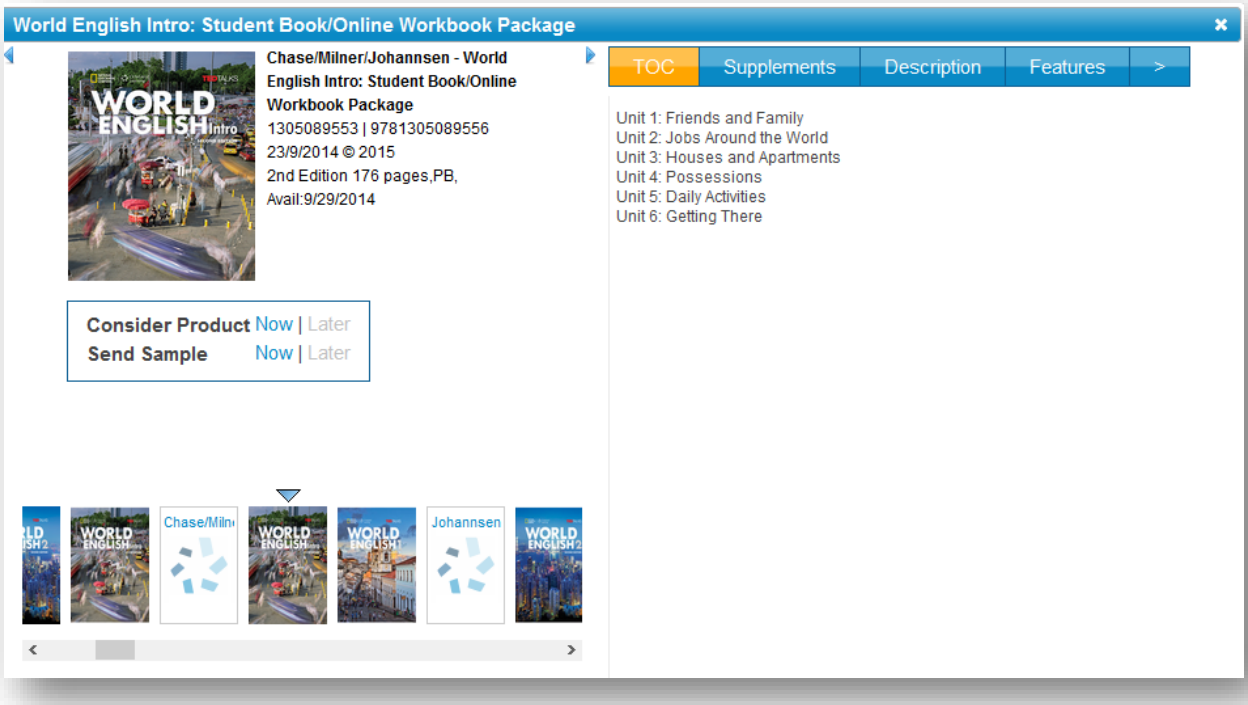


Or click on any piece of cover art displayed at the bottom of the products details popup.



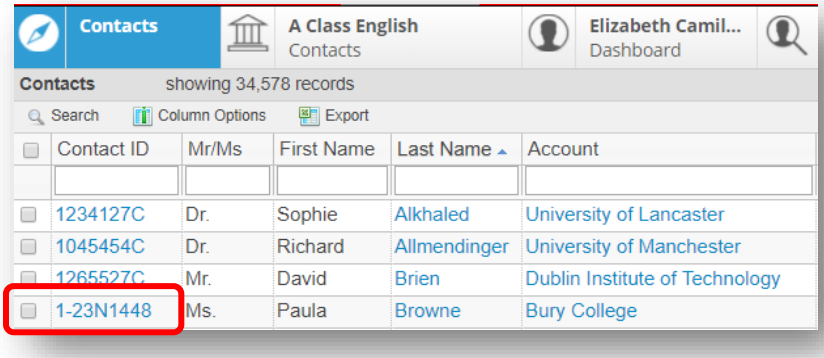
Product Details

The first product detail listed for every product is the TOC however there are many other product attributes available via the buttons at the top of the pop-up. 'Hidden' buttons can be exposed by clicking the '**>**' on the right side of the pop-up.

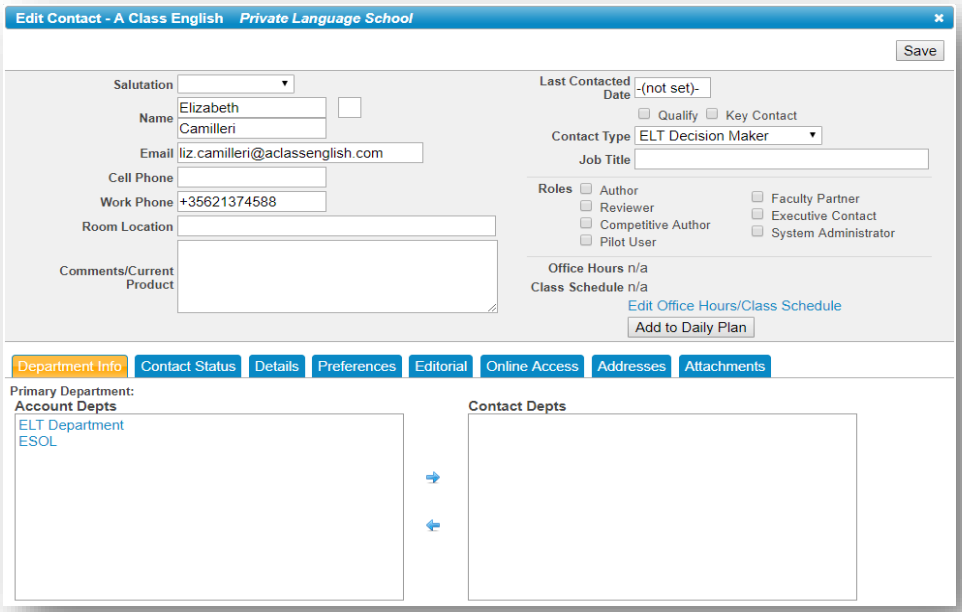


CONTACTS

Each contact in Magellan is uniquely identified by a value in the Contact ID column. This field also serves as a hyperlink to edit basic contact information like name, email, office hours, shipping address, and etcetera.



Edit Contact Details

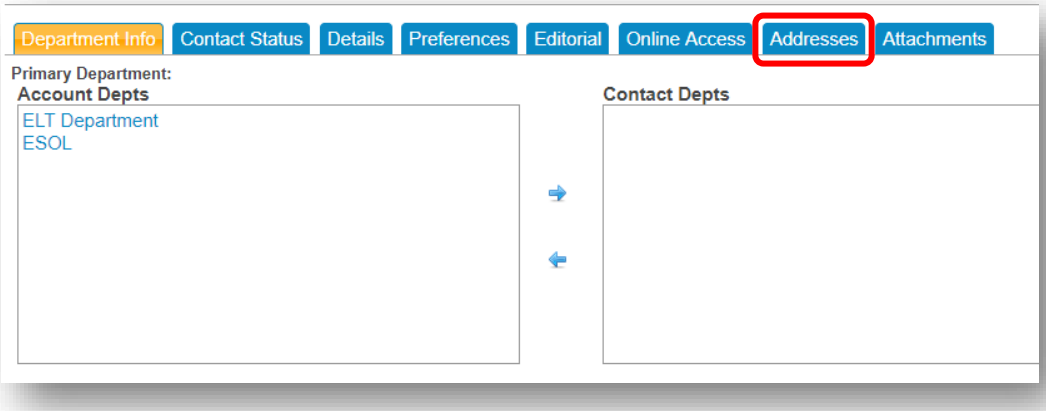


The most common fields to edit for a contact are located at the top of the Edit Contact pop-up. Other important fields are located on a series of tabs at the bottom of the pop-up. You can use the shuttle box feature to associate/disassociate contacts to departments on the 'Department Info' tab, or adjust e-mail preferences on the 'Preferences' tab, and etcetera.

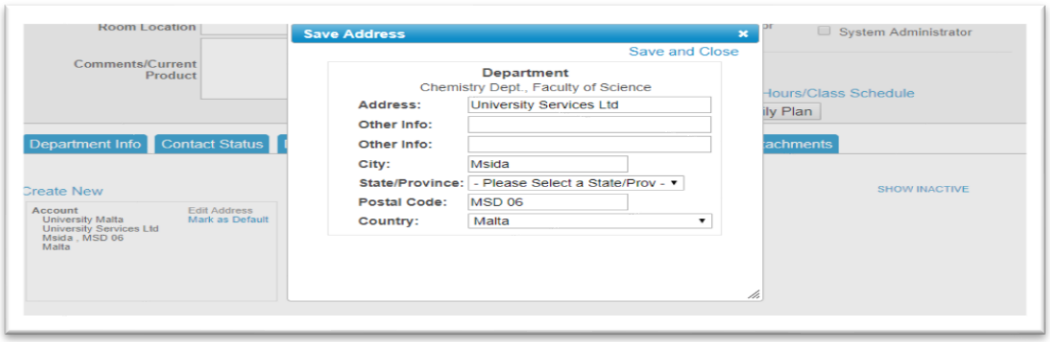
Once you have completed editing a contact record click the 'Save' command at the top of the pop-up. You will not be prompted to save if you simply click the 'X' to close the pop-up and your changes will be lost.

Addressing

All addresses associated with a contact appear on the 'Addresses' tab in a contact record.



Each address is represented in a business card style. Editable addresses have an 'Edit Address' hyperlink on the card.

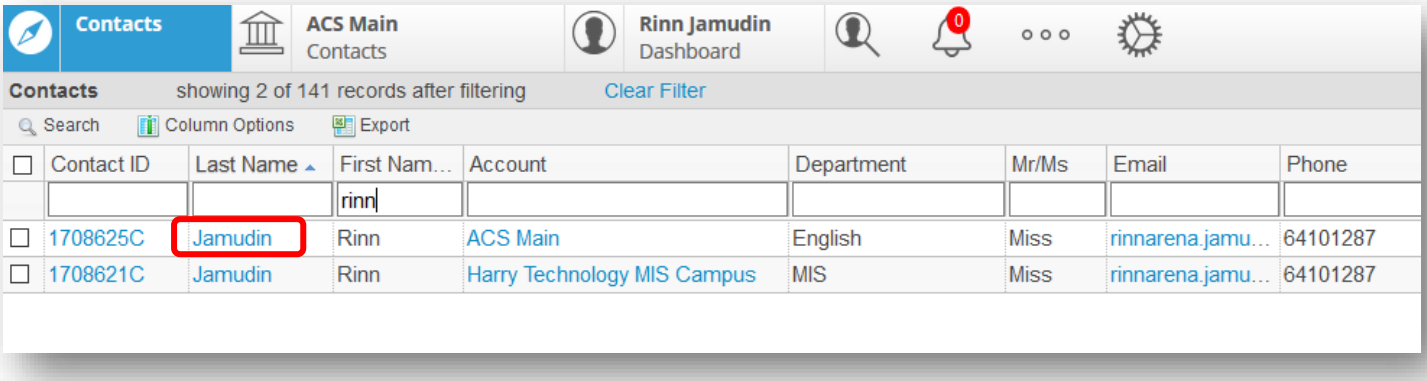


Add a New Contact Address

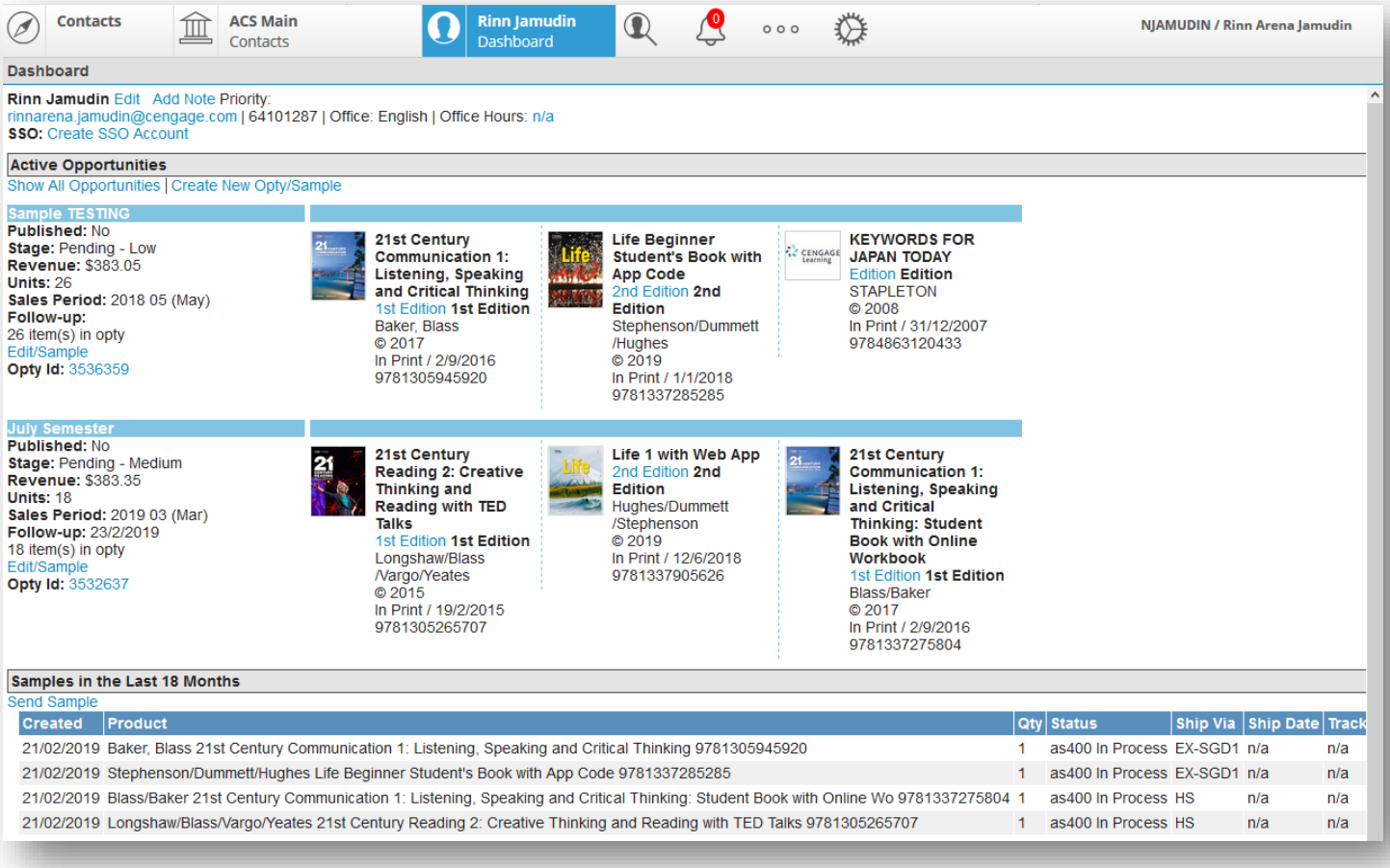
1. Locate the contact you want to edit.
2. Click the '**Contact ID**' for that contact to display the Edit Contact pop-up.
3. Click the '**Addresses**' tab.
4. Click the '**Create New**' link at the top of the list of current addresses.
5. Enter all address information and click the '**Save and Close**' link.

View Contact Dashboard

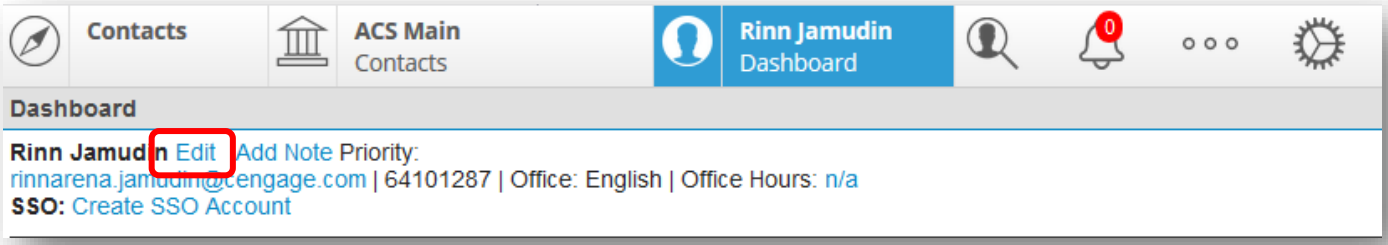
Each contact's last name is a hyperlink to their dashboard.



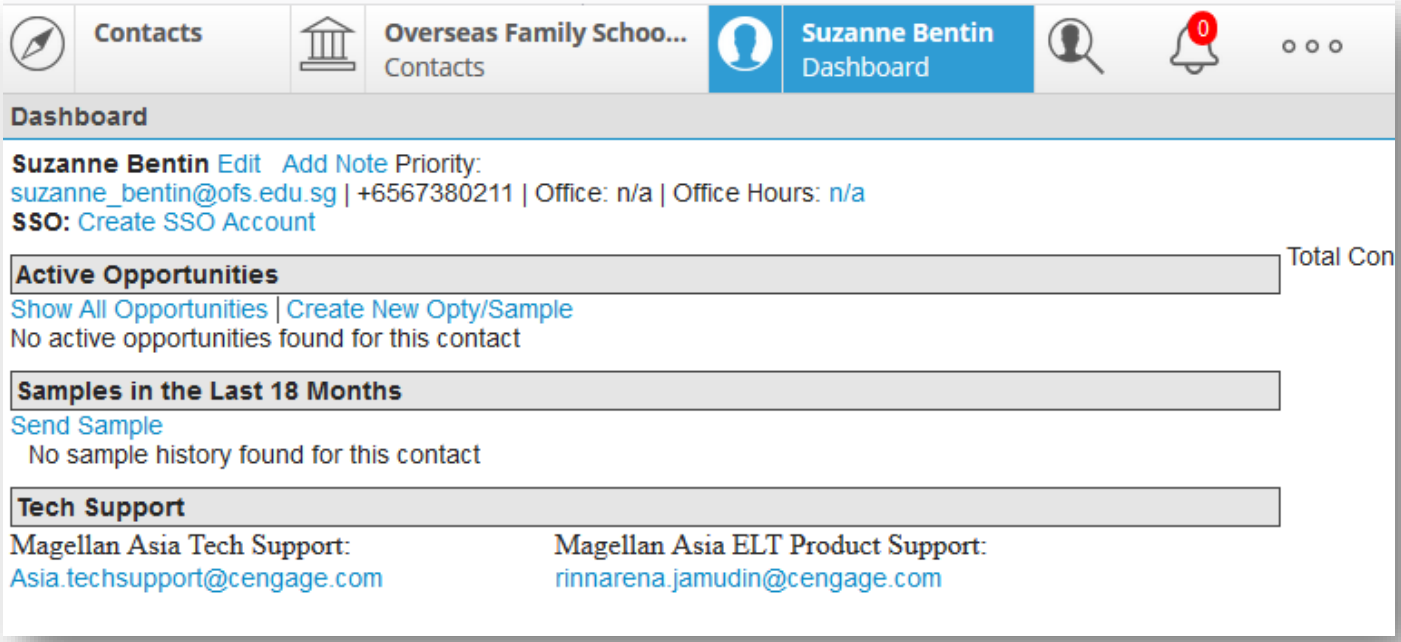
You will see the currently selected contact name displayed above the Contact views. Other key information is listed on the relevant tabs.



In the event that you need to edit the selected contact record, there is an Edit link to the right of the contact name. This link displays the same pop-up as the Contact ID link located in the contact list.



The Contact Dashboard has 4 different tabs.

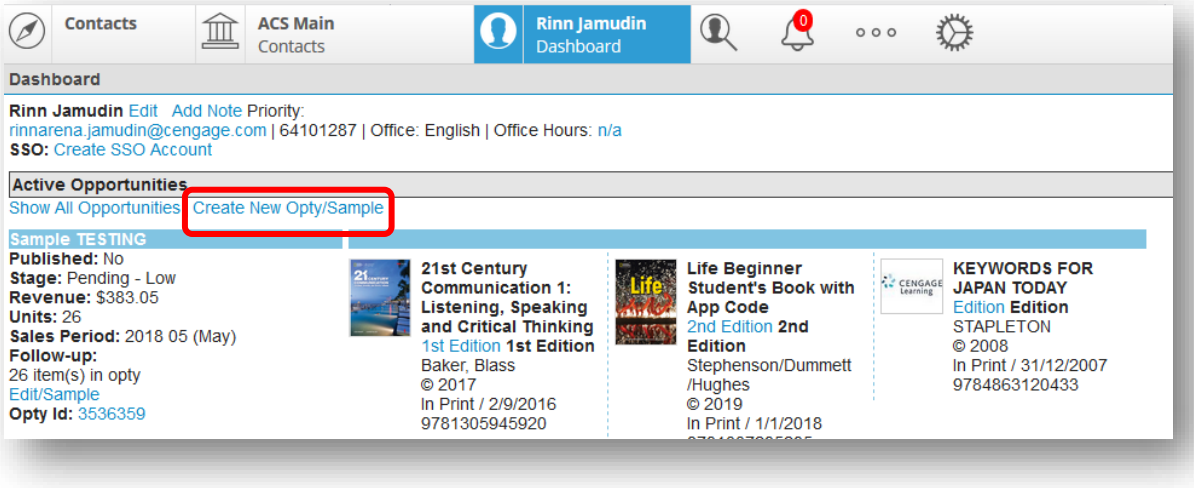


- **SSO Account Request**
- **Active Opportunity** – Shows the Opportunities associated with the Contact.
- **Sample History in the last 8 months**– Shows
- **Tech Support**

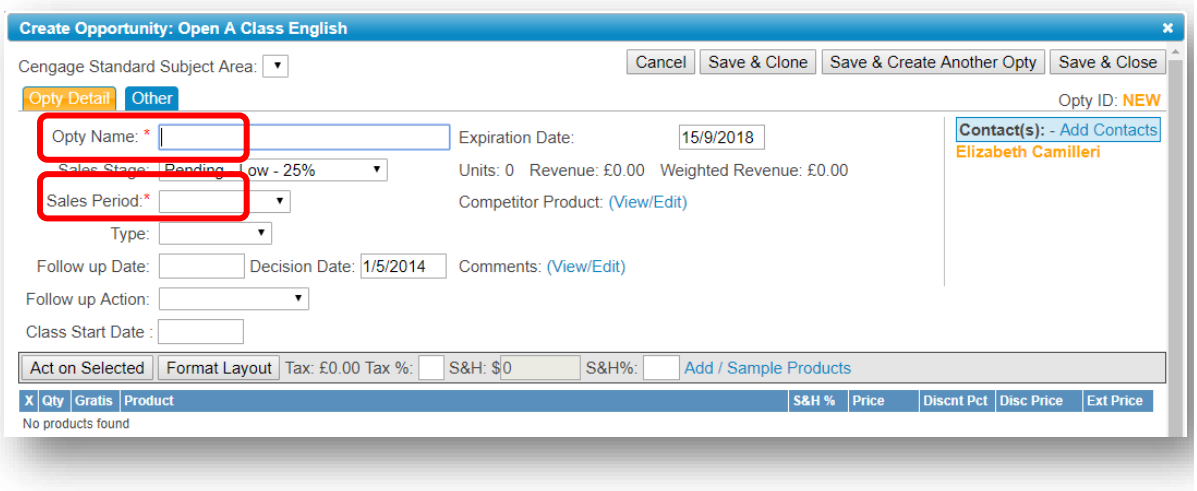
OPPORTUNITIES

Create a New Opportunity

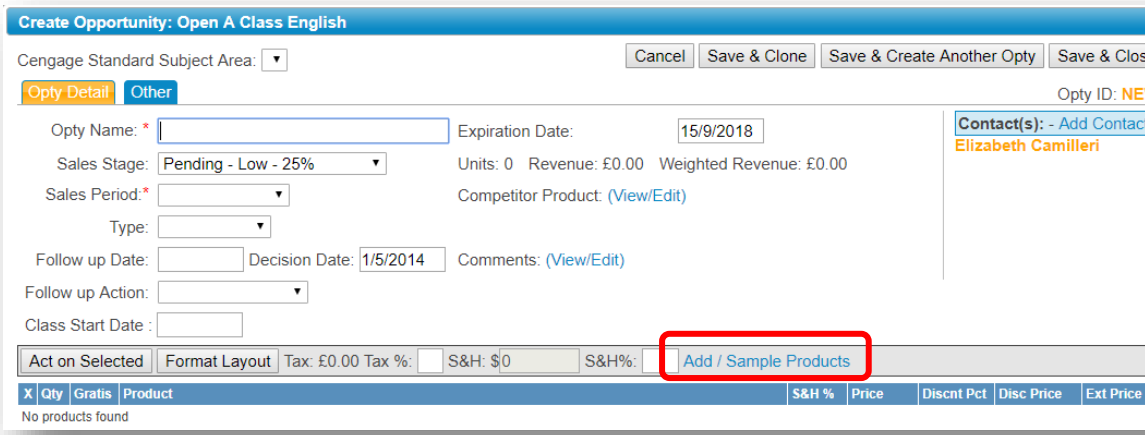
1. From Contact Dashboard, click the '**Create New Opty/Sample**' link.



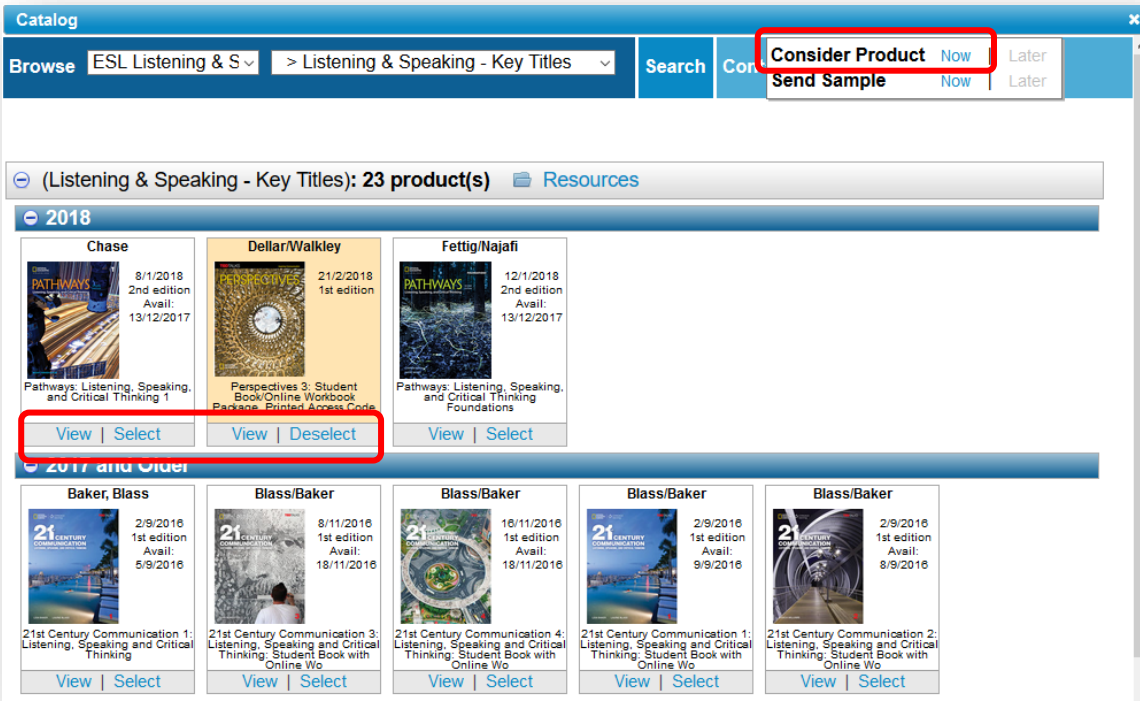
2. Complete any known opportunity data using the fields provided. Note that **Opty Name** and **Sales Period** are mandatory fields.



3. Click the '**Add Sample/Products**' link.



4. Search for and drill into the product you want to add to the opportunity.
5. Click **'Select'** then click '**Now**' hyperlink to the immediate right of the Consider Product label.

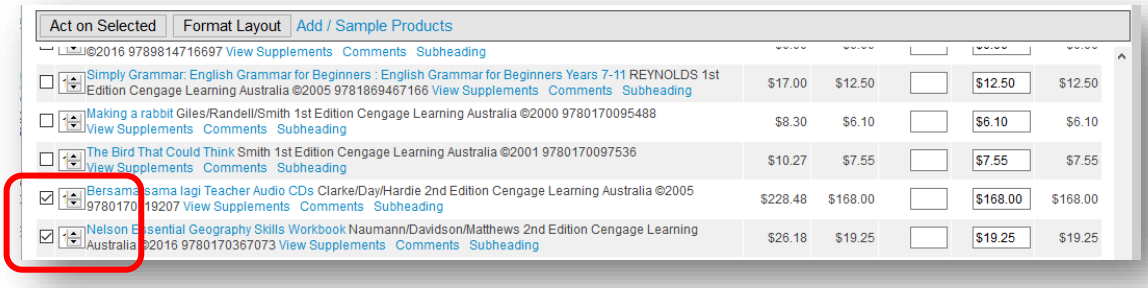


6. Close this popup and repeat steps 4-5 to add additional products to the opportunity.
7. Close the pop-up catalog.
8. Click the '**Save**' command button to save your new opportunity.

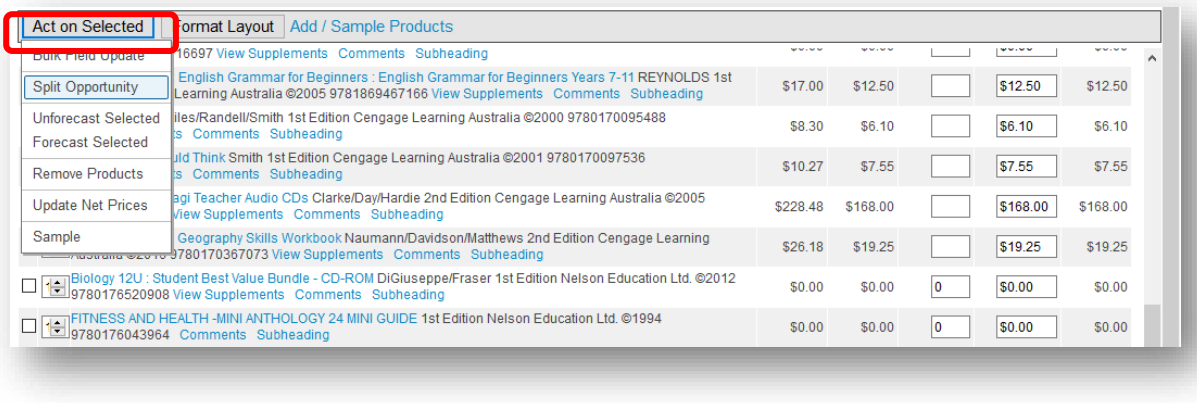
Split an Opportunity & Save & Clone an Opportunity

For those opportunities you are already tracking that may need to be split based on decision type, you can easily split the opportunity.

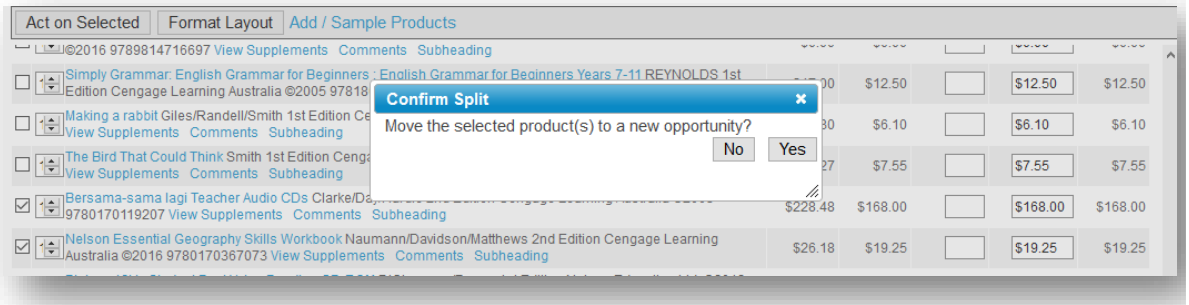
1. From the Opportunity detail pop-up, highlight the Products on the opportunity you want to split out.



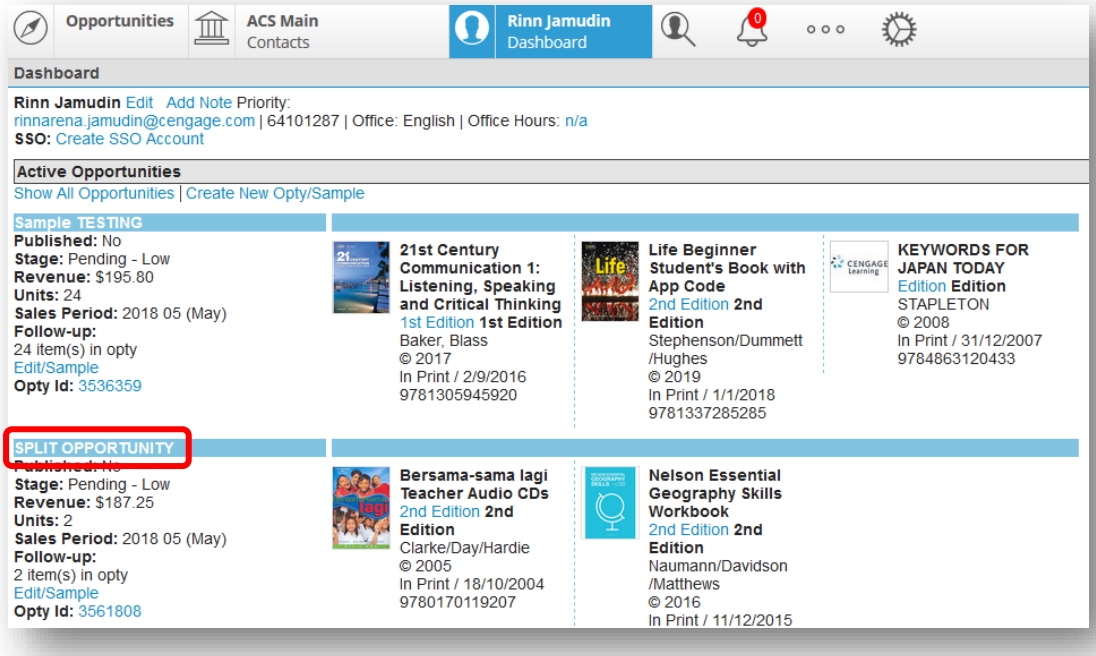
Choose the '**Act on Selected'** option and select **Split Opportunity**.



Click **YES**



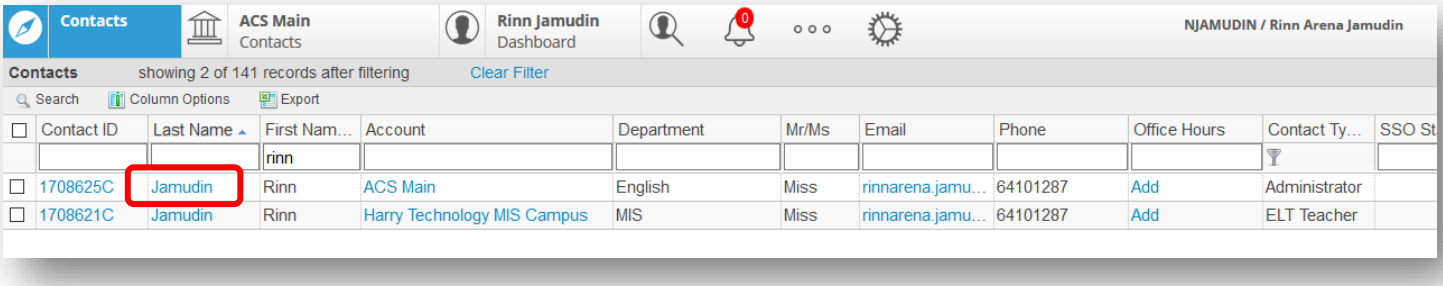
2. When you return to the Contact Dashboard, the top opportunity will be the new opportunity created.



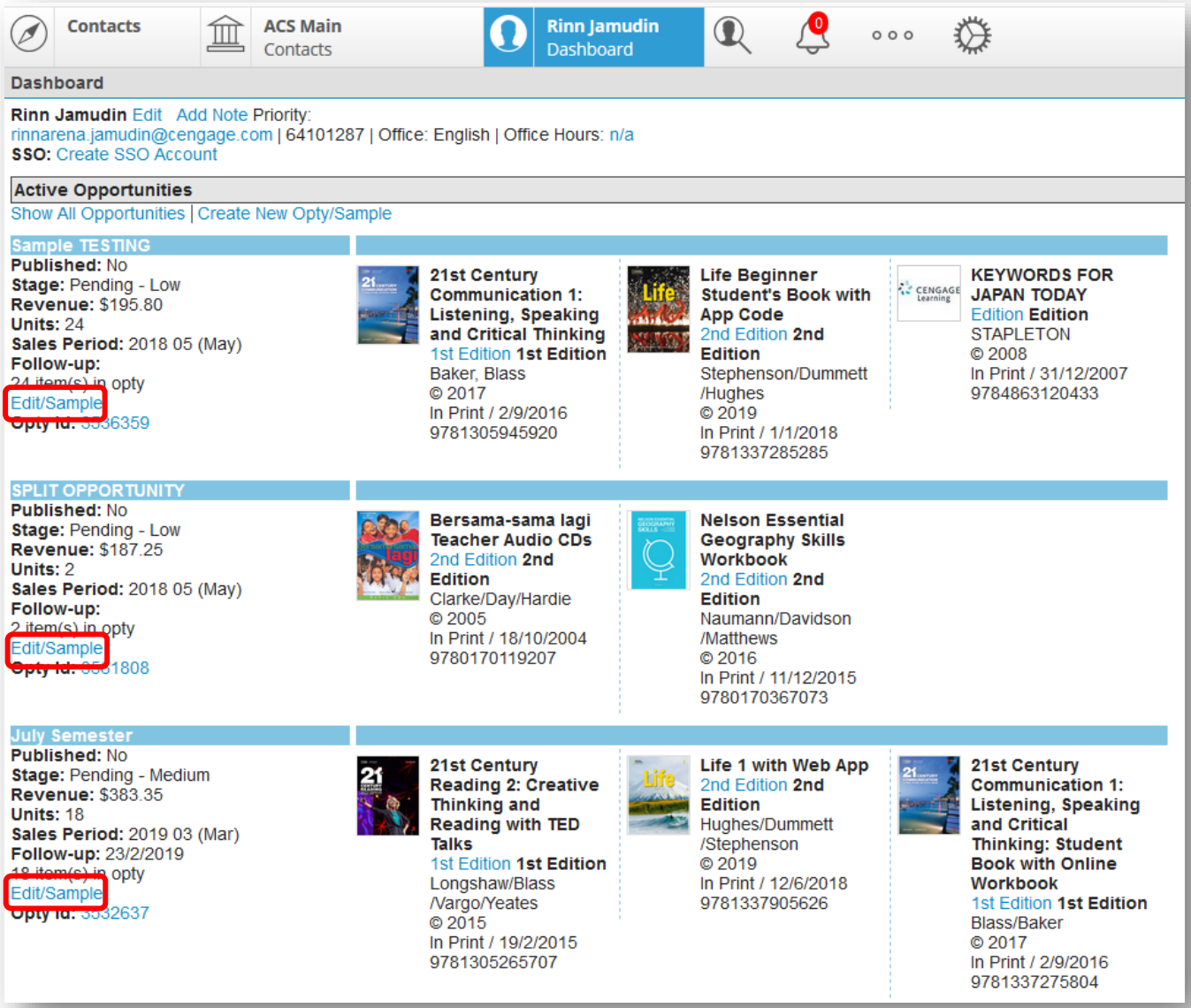
The original opportunity you selected should now have an adjusted (decreased) forecasted unit value.

Edit an Opportunity

Anytime you see an opportunity ID (a unique identifier) you can click the hyperlink to display all opportunity information. This is where you can best manage the opportunity and related details.

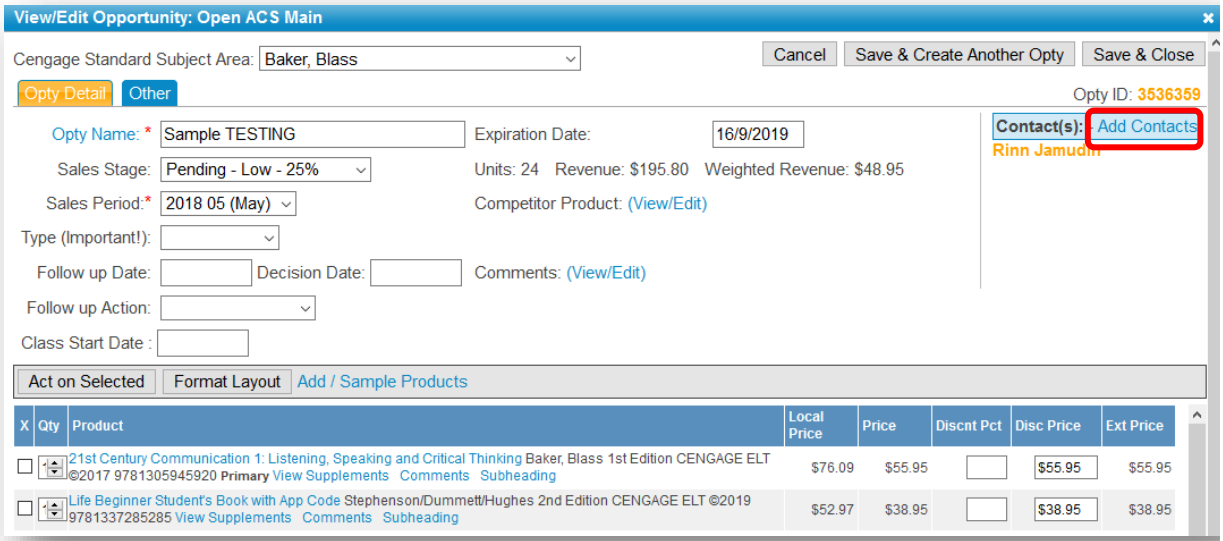


Or from the Contact Dashboard, Pipeline Tab, by clicking **'Edit/Sample'**.

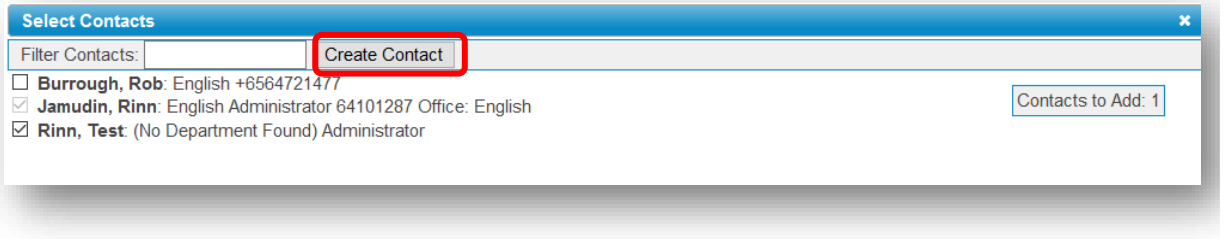


Add Opportunity Contacts

1. From the Opportunity detail pop-up, click the '**Add Contacts**' link.

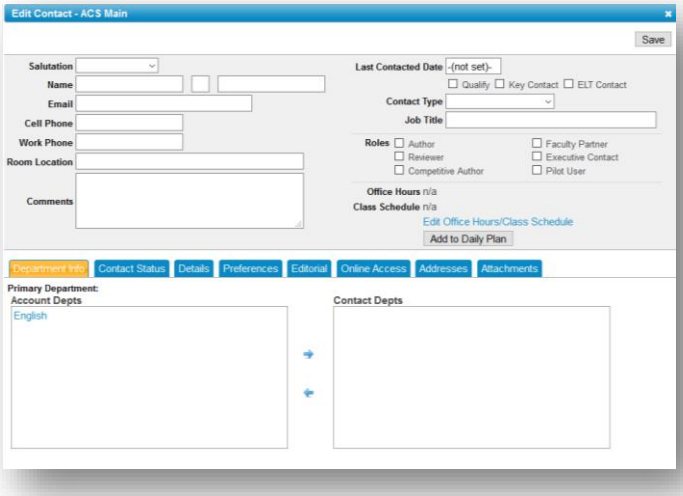


2. Use the filter and option buttons to locate the contact(s) you wish to add to the selected opportunity.



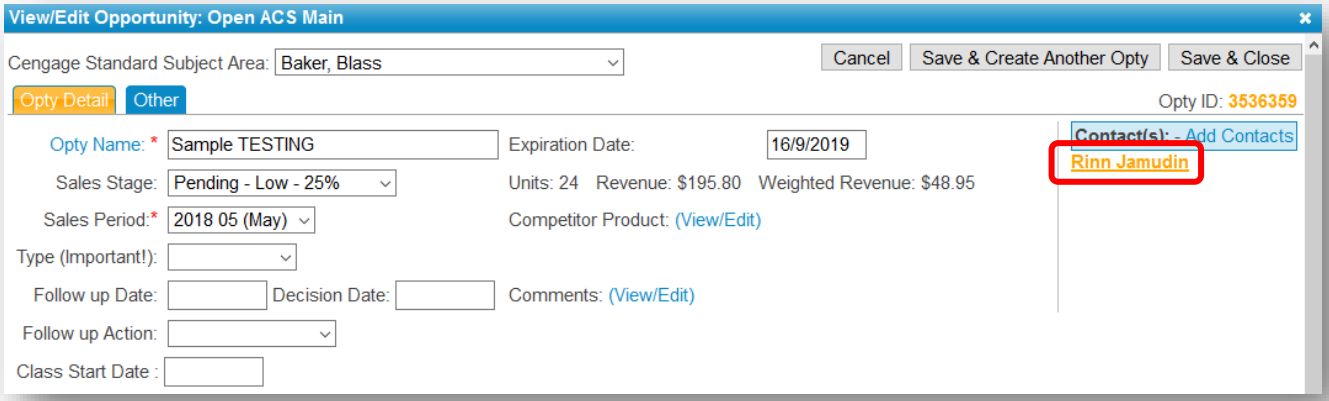
Contacts already on an opportunity will appear to be selected with a gray, completed check box.

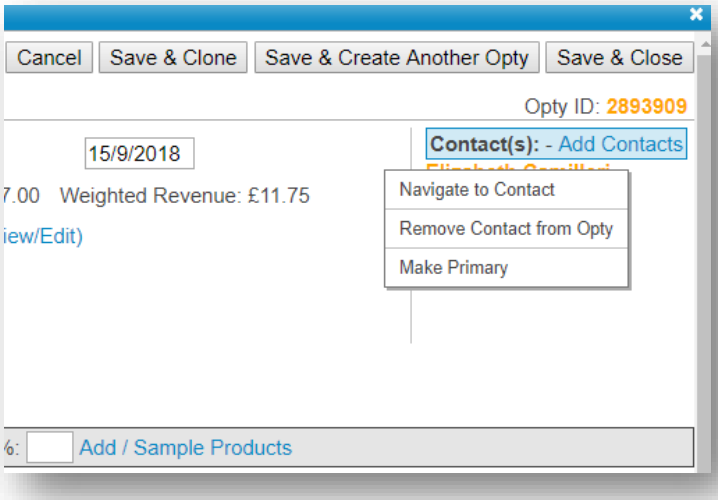
3. To create/add a new contact, select **"Create Contact"** and fill in the details.



4. Click the '**Select**' command button. Then click **Save and Close**.

Manage Existing Contacts

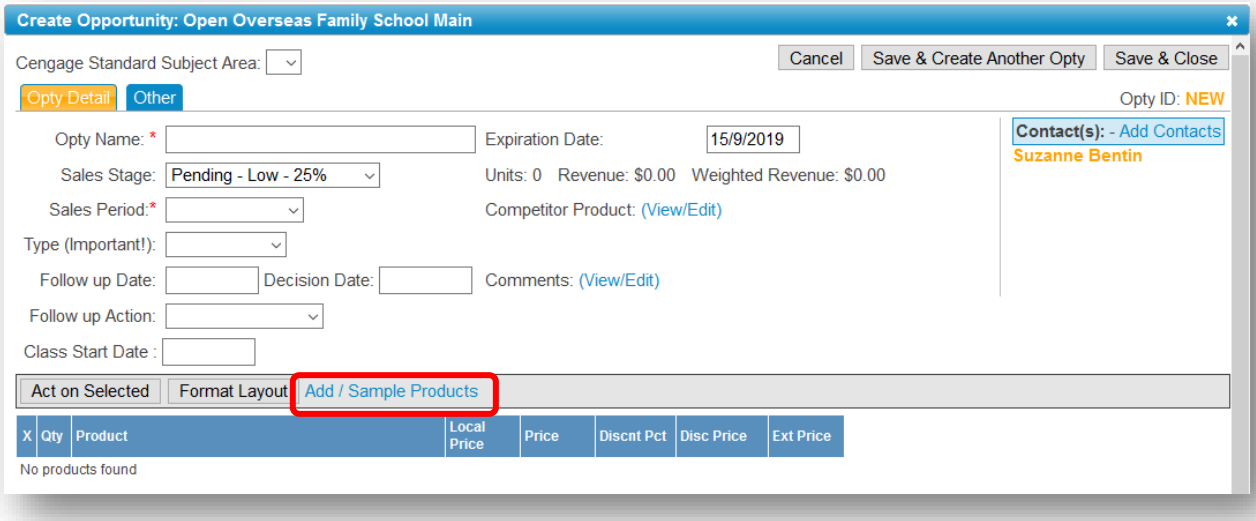




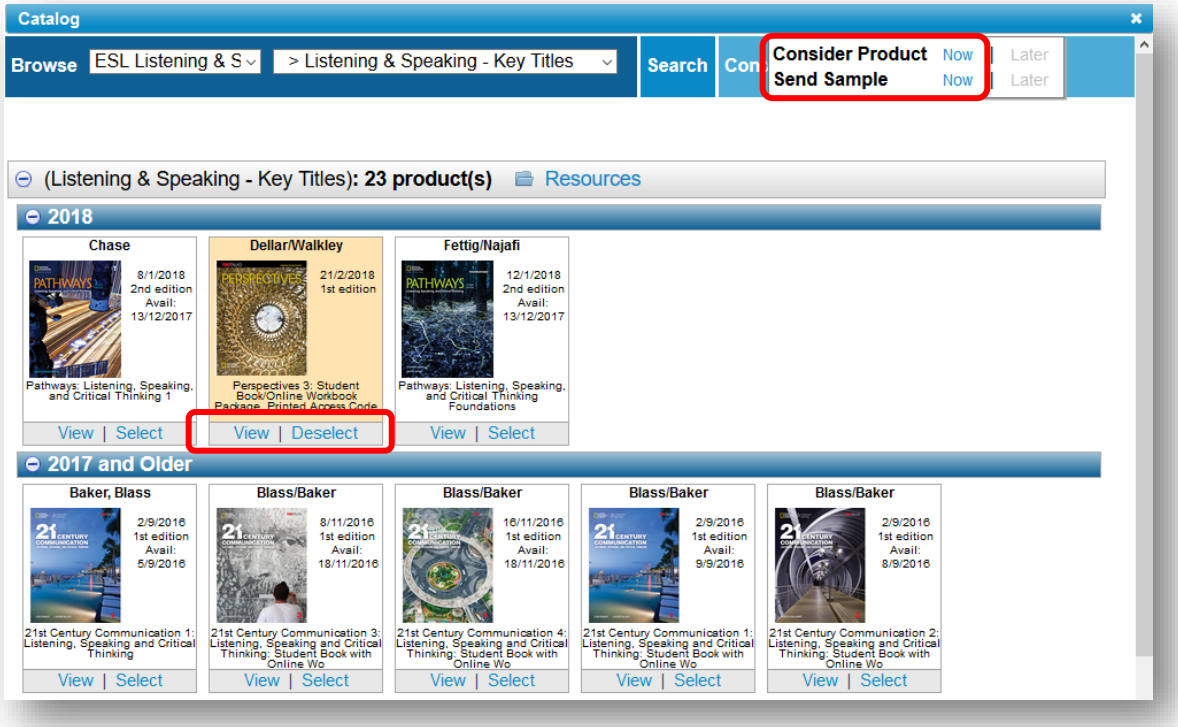
If you click a contact hyperlink on an opportunity you are not navigated to a new screen, rather are presented with a list of actions you can take with that contact. Contacts already in a bold, yellow font are designated as the primary contact on an opportunity.

Add Sample/Products

The '**Add Sample/Products**' hyperlink will bring up the catalog, showing course products by default.



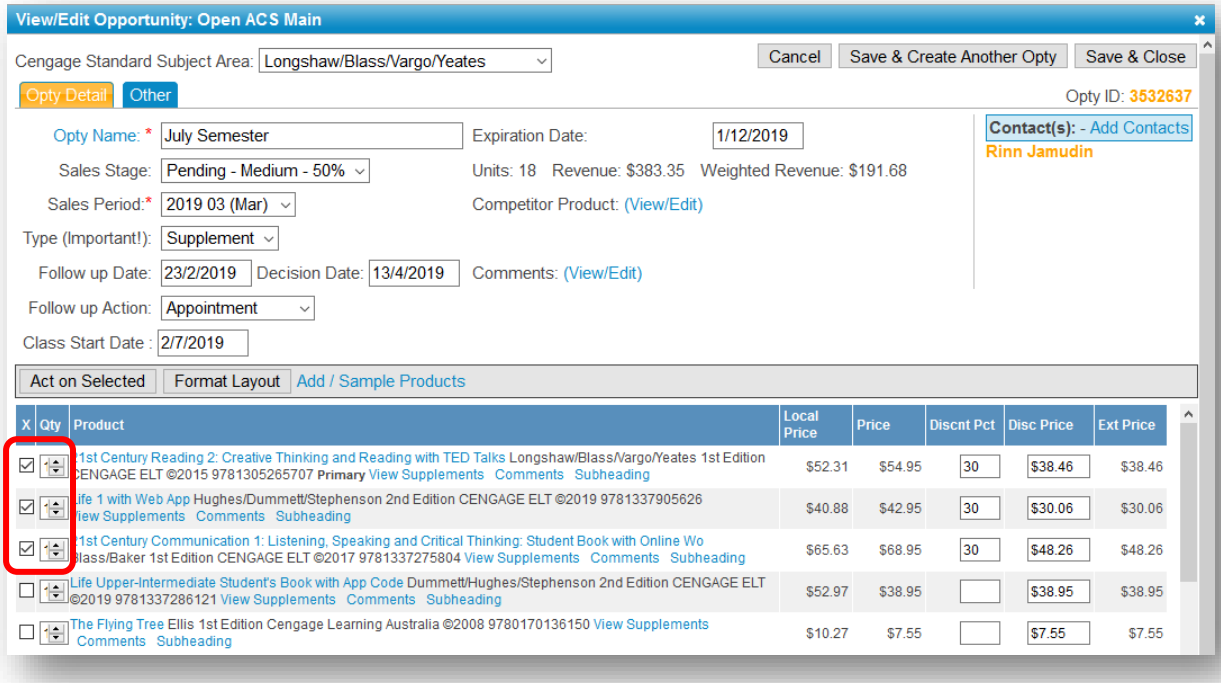
1. From the Opportunity detail pop-up, click the '**Add Sample/Products**' link.
2. Locate the product you want to add to the opportunity.
3. Drill into the product to view product details.
4. Click the '**Now**' link to the immediate right of the 'Consider Product' label.



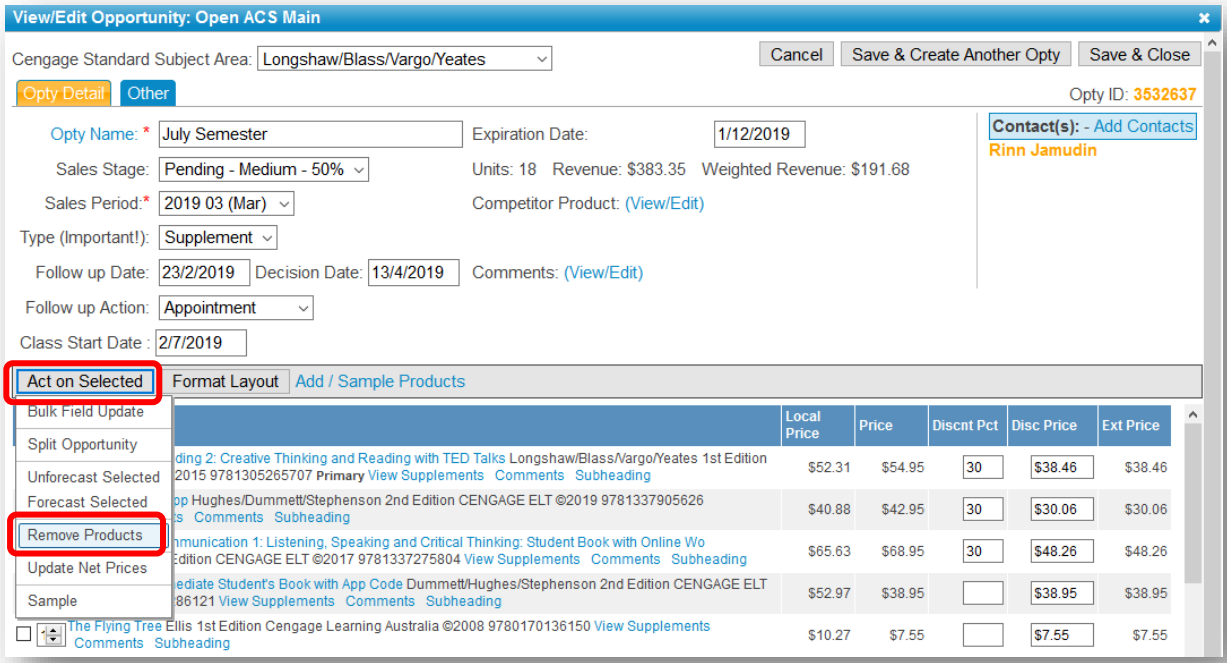
5. Close the product pop-up
6. Repeat steps 2-5 to add more products.
7. Close the pop-up to return to the opportunity details pop-up.

Remove Products

From the Opportunity detail pop-up, highlight the Products on the opportunity you want to delete.

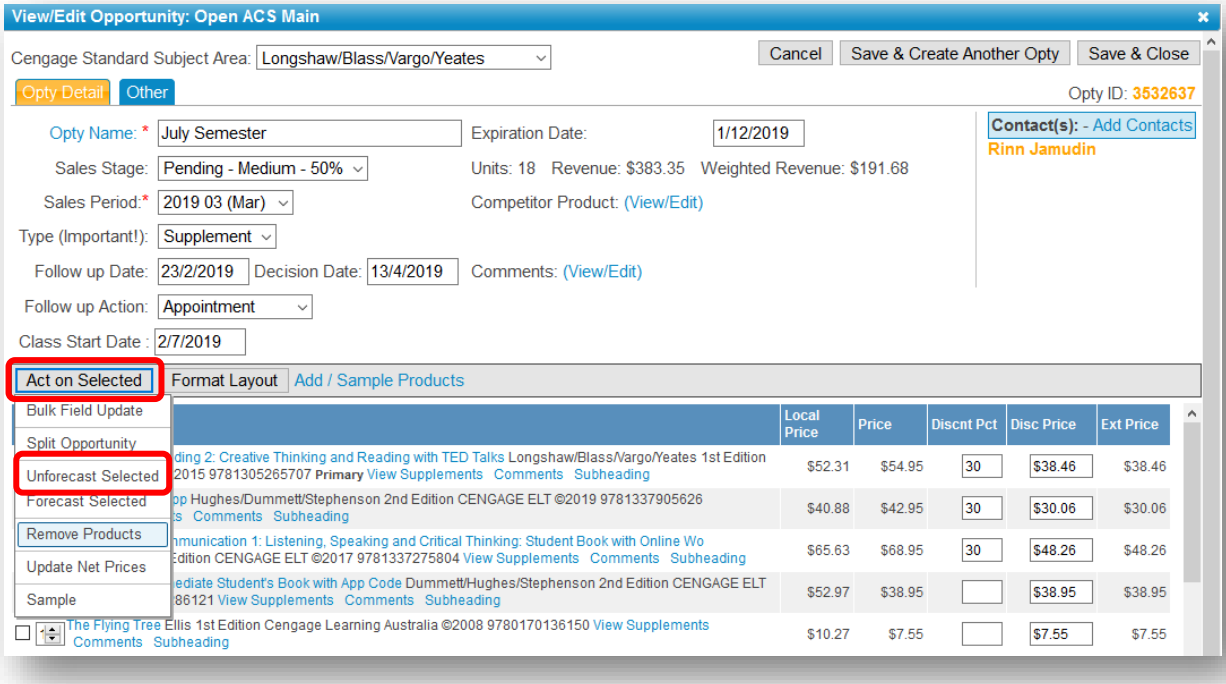


Choose the '**Act on Selected'** option and select **Remove Products**.



Unforecast Products

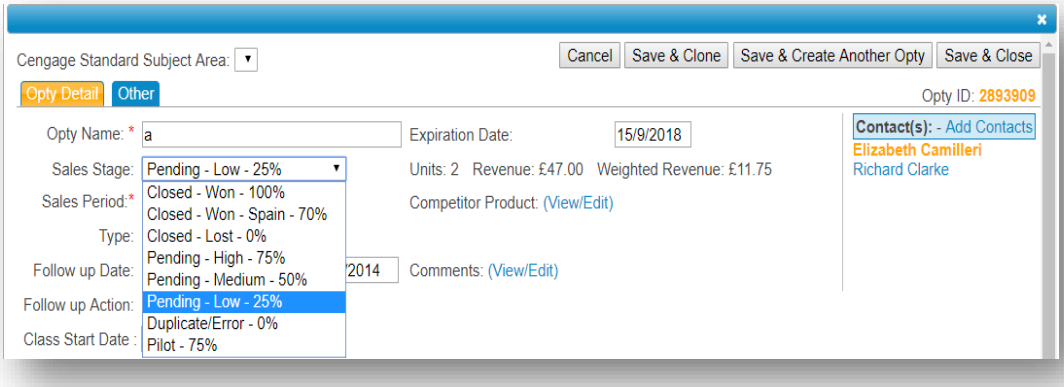
To remove a Product from the forecasted revenue, from the Opportunity detail pop-up, highlight the Products on the opportunity you want to delete. And select **Unforecast Selected.**



By default the first product added to an opportunity is the primary product.

Close an Opportunity

1. From the Opportunity detail pop-up, choose the '**Stage**' drop-down list box.

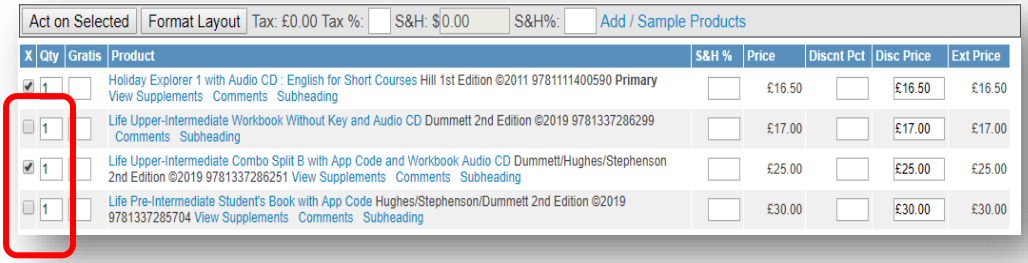


2. Select relevant '**Closed**' option.
3. Click the '**Save**' command button.

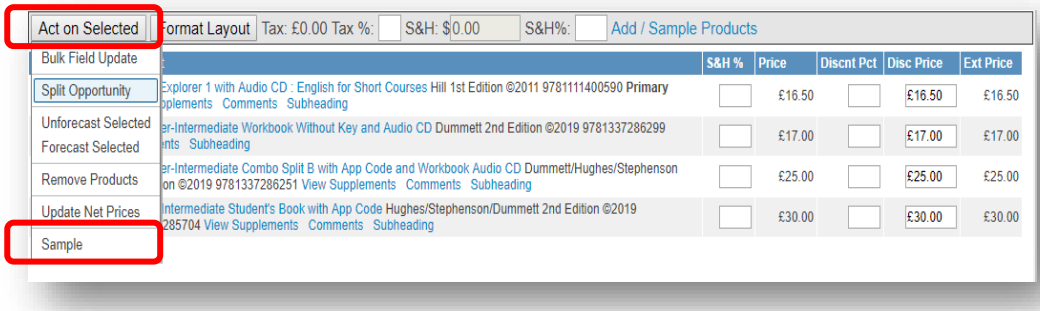
Sampling

Sample an Existing Opportunity

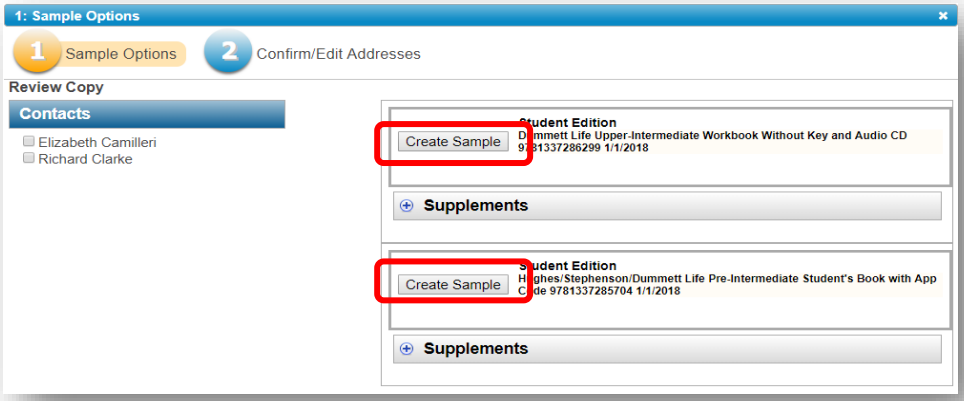
1. From the Opportunity detail pop-up, highlight the Products on the opportunity you want to Sample.



2. Choose the '**Act on Selected'** option and select **Sample**.



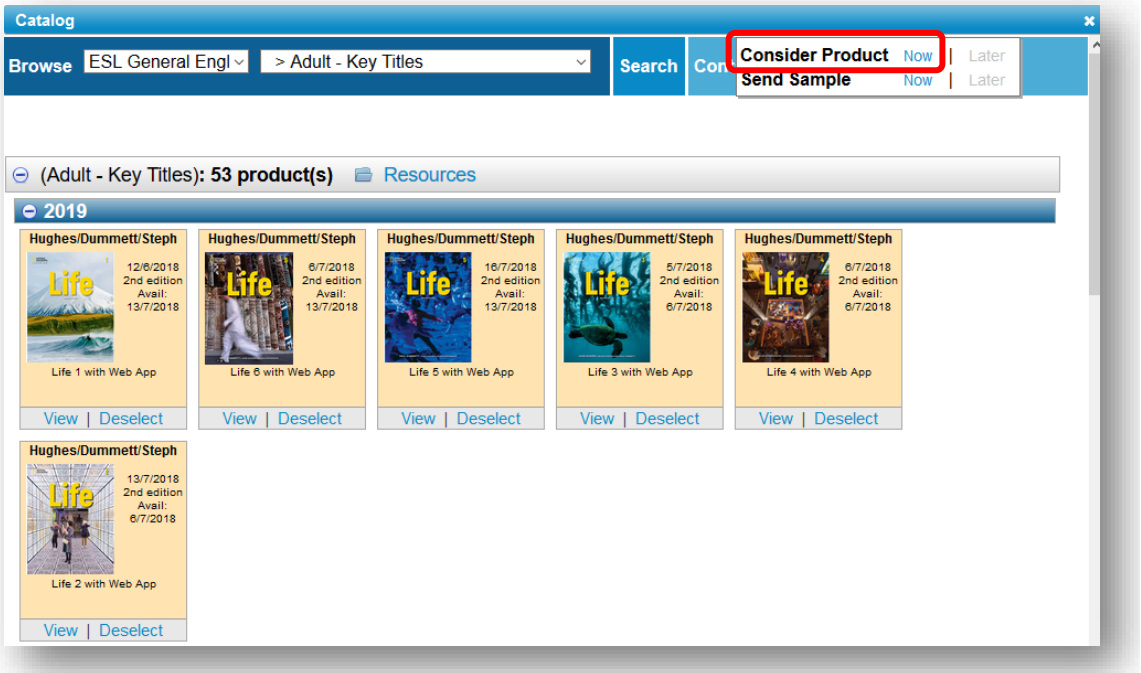
3. Using the check boxes provided, select the contact(s) you want to sample.
4. Click the '**Create Sample**' box to the immediate left of the version of the product(s) you wish to sample.



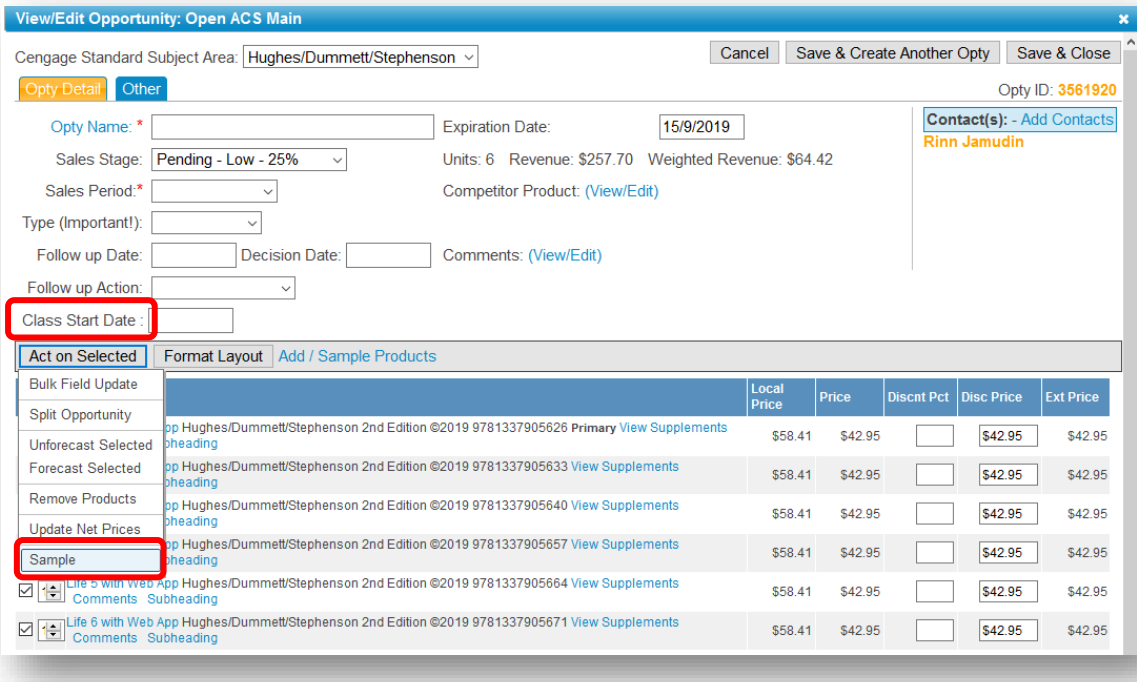
5. Adjust the quantity (if necessary).
6. Click the '**Next**' command button.
7. Confirm/edit the address used for the sample(s).
8. Click '**Save and Close**' and close the catalog pop-up.

Sample a New Opportunity

1. From the Institution Course detail pop-up, create a new opportunity. Be sure to fill in all the mandatory fields, or you won't be able to sample.
2. Click **'Add Sample/Product'**.

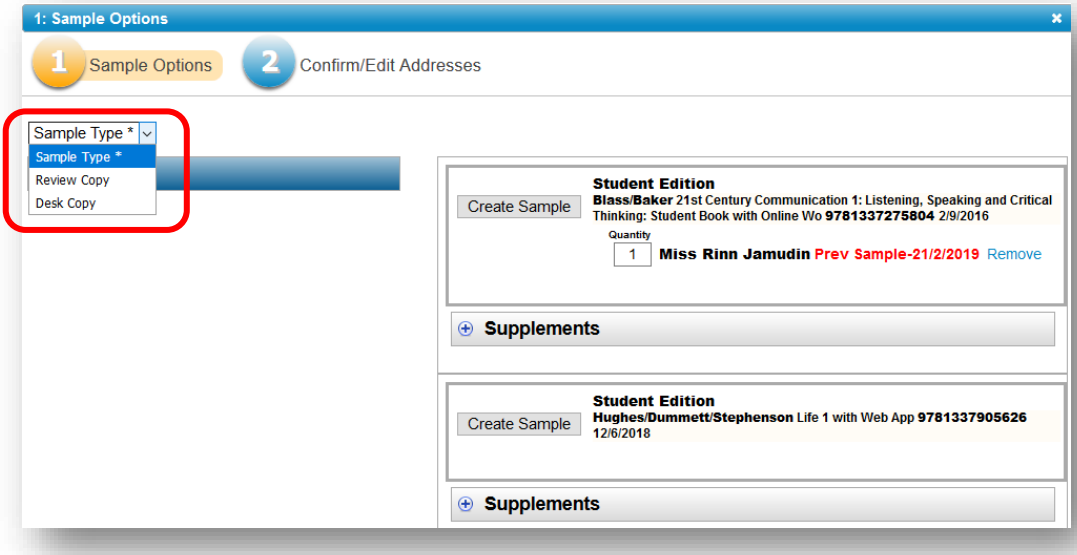


3. After you have added a product to the opportunity click the '**Save**'.
4. Select the product and **Act on Selected** then click **Sample**.



5.

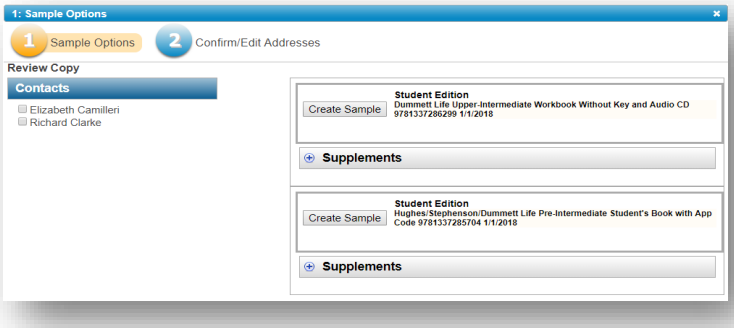
6. Click the Sample Type option and select either for **Review Copy** or for **Desk Copy.**



7. Adjust the quantity (if necessary).
8. Click the '**Next**' command button
9. Confirm/edit the address used for the sample(s).
10. Click '**Save and Close**' and close the catalog pop-up.

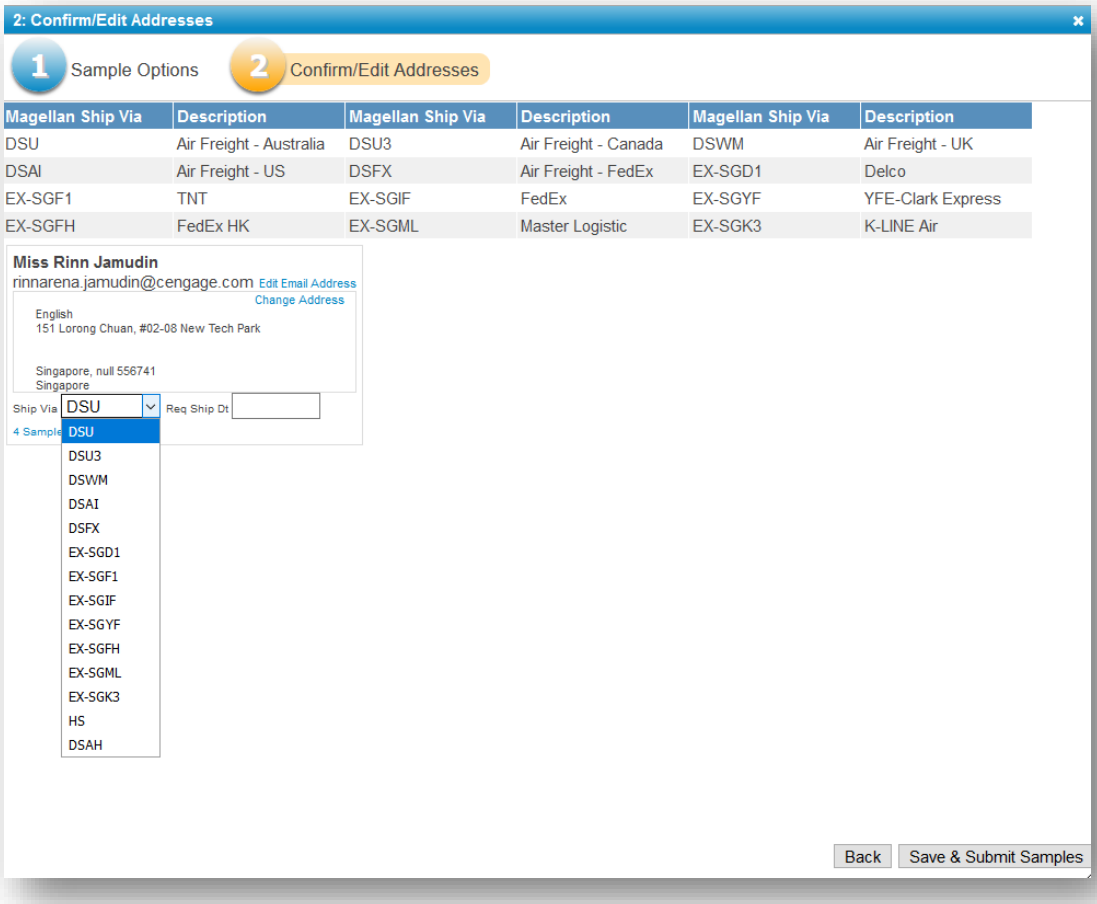
Sample Supplements

1. Follow the steps for Sampling a Product.
2. On the Sample Options screen, click the drop down for the Supplements.



3. Use the check boxes provided to select the supplement(s) you wish to sample.
4. Adjust the quantity (if necessary).
5. Click the '**Next**' command button
6. Confirm/edit the address used for the sample(s).
7. Click '**Save and Close**' and close the product details pop-up.

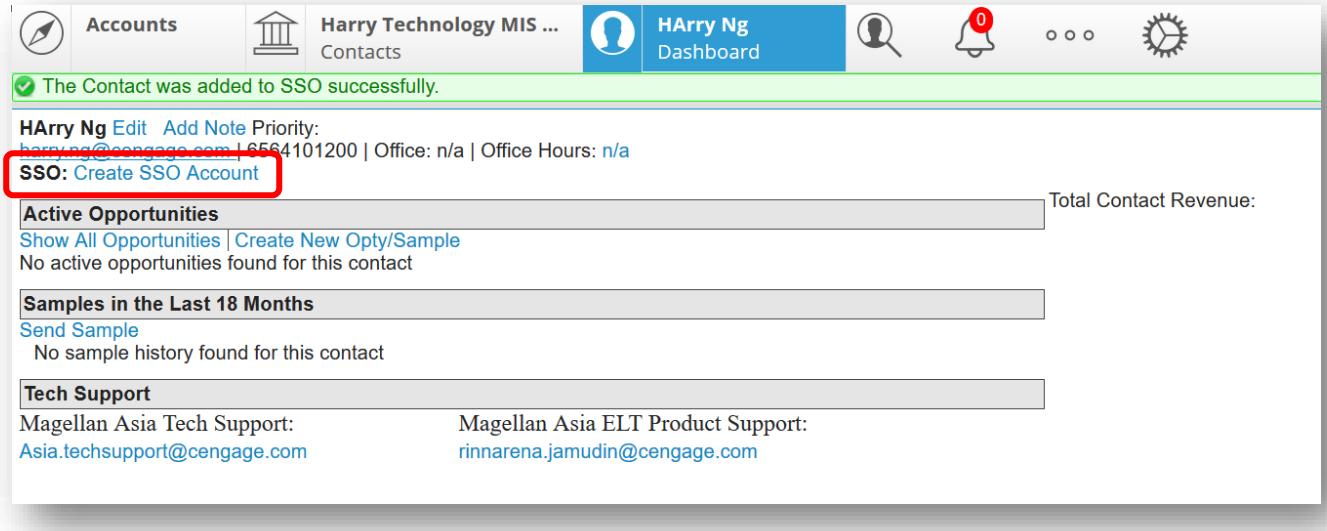
Sampling Shipment Options



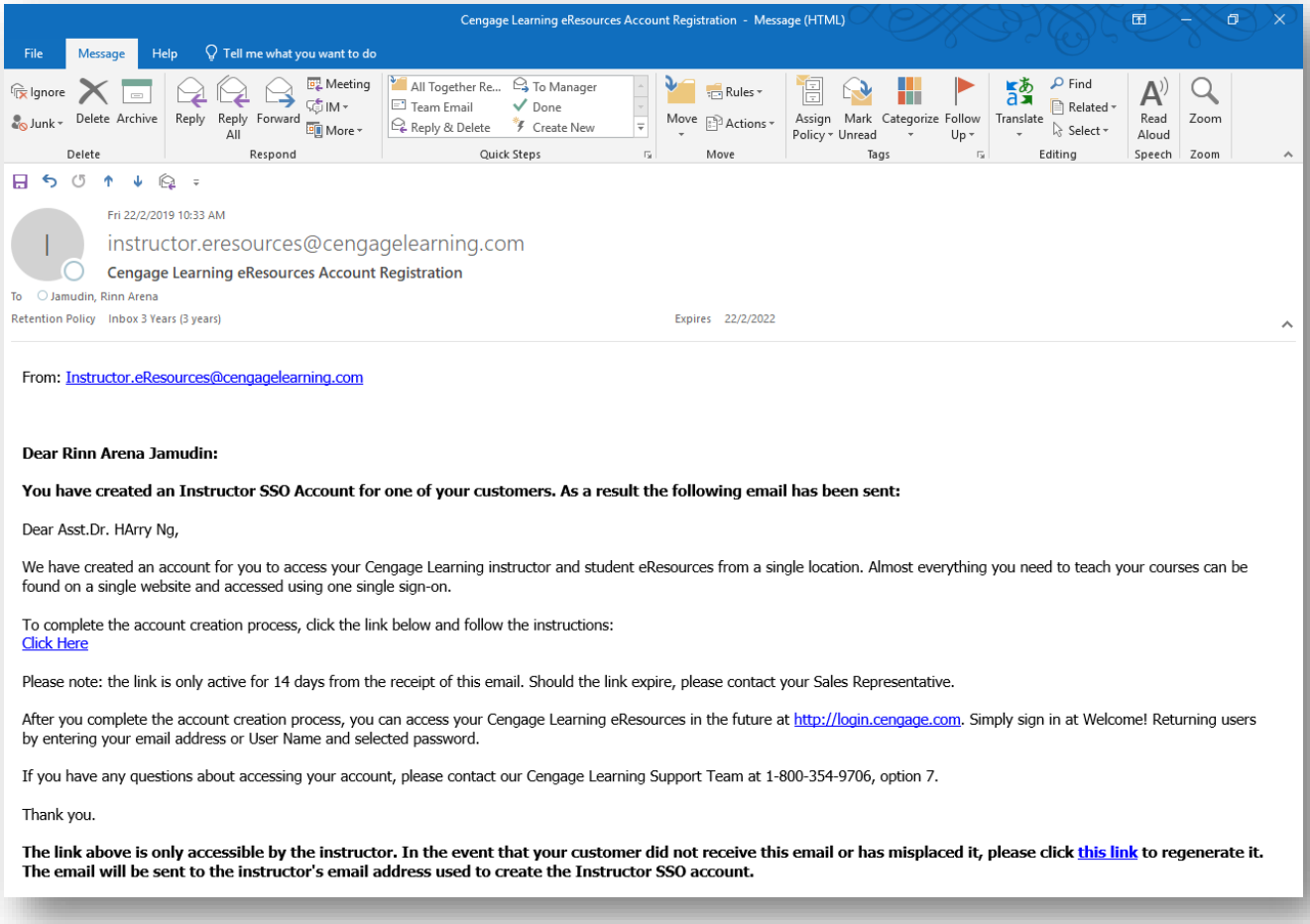
Shipping Point	ship via code	Warehouse	Specific Territory	Description
Dropship	DSAH	Air Freight - US	Hong Kong	For HK dropship via airfreight only
Dropship	DSAI	Air Freight - US	SG/MY/TH/ID/PH/VN	AF Dropship via SG
Dropship	DSFX	Air Freight - FedEx	All	all to use - shipping direct to destination
Dropship	DSU	Air Freight - Australia	All	all to use
Dropship	DSU-	Air Freight - Australia	All	all to use
Dropship	DSU3	Air Freight - Canada	All	all to use
Dropship	DSWM	Air Freight - UK	All	all to use
Ex-Sing	EX-SGD1	Delco	Singapore	For Singapore used only
Ex-Sing	EX-SGFH	FedEx HK	Hong Kong	For Hong Kong used only
Ex-Sing	EX-SGF1	TNT	Malaysia	For Malaysia used only
Ex-Sing	EX-SGIF	FedEx	All	For All used only
Ex-Sing	EX-SGK3	K-LINE Air	Japan	For Japan used only
Ex-Sing	EX-SGML	Master Logistic	Indonesia	For Indonesia used only
Ex-Sing	EX-SGYF	YFE-Clark Express	Philippines	For Philippines used only
Office	HS	Hand Sampling	ALL	For ALL used

Create/Request SSO Account

1. Click the **Create SSO Account** on the Account dashboard.

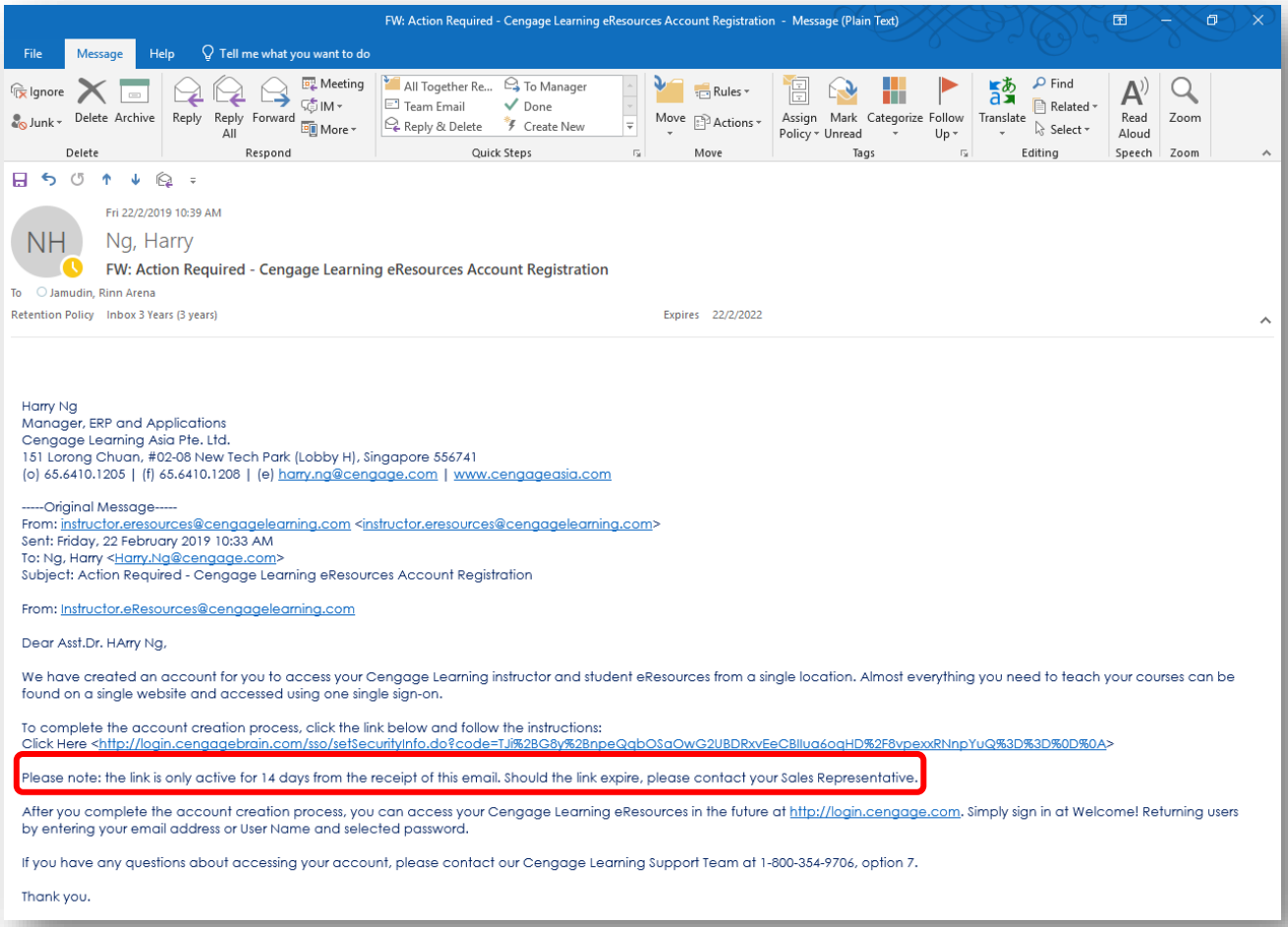


2. Within minutes, you will receive a confirmation email from **instructor.eresources@cengagelearning.com** to inform the account has been successfully created.



3. At the same time, the teacher/instructor will receive an email from **instructor.eresources@cengagelearning.com** to inform that we have created an instructor's account for him and provided a simple instruction on how to complete the process.

   PLEASE NOTE THE COMPLETION PROCESS LINK IS **ONLY VALID FOR 14 DAYS**. SO please help to remind the teacher/instructor to submit immediately upon receiving the email.



FW: Action Required - Cengage Learning eResources Account Registration - Message (Plain Text)

Fri 22/2/2019 10:39 AM

Ng, Harry

FW: Action Required - Cengage Learning eResources Account Registration

To Jamudin, Rinn Arena

Retention Policy Inbox 3 Years (3 years) Expires 22/2/2022

Harry Ng
Manager, ERP and Applications
Cengage Learning Asia Pte. Ltd.
151 Lorong Chuan, #02-08 New Tech Park (Lobby H), Singapore 556741
(o) 65.6410.1205 | (f) 65.6410.1208 | (e) harry.ng@cengage.com | www.cengageasia.com

-----Original Message-----
From: instructor.eresources@cengagelearning.com <instructor.eresources@cengagelearning.com>
Sent: Friday, 22 February 2019 10:33 AM
To: Ng, Harry <Harry.Ng@cengage.com>
Subject: Action Required - Cengage Learning eResources Account Registration

From: Instructor.eResources@cengagelearning.com

Dear Asst.Dr. HArry Ng,

We have created an account for you to access your Cengage Learning instructor and student eResources from a single location. Almost everything you need to teach your courses can be found on a single website and accessed using one single sign-on.

To complete the account creation process, click the link below and follow the instructions:
Click Here <http://login.cengagebrain.com/sso/setSecurityInfo.do?code=TJi%2BG8y%2BnpeQgbOSgOwG2UBDRxvEeCBIlua6oqHD%2F8vpexxRNnpYuQ%3D%3D%0D%0A>

Please note: the link is only active for 14 days from the receipt of this email. Should the link expire, please contact your Sales Representative.

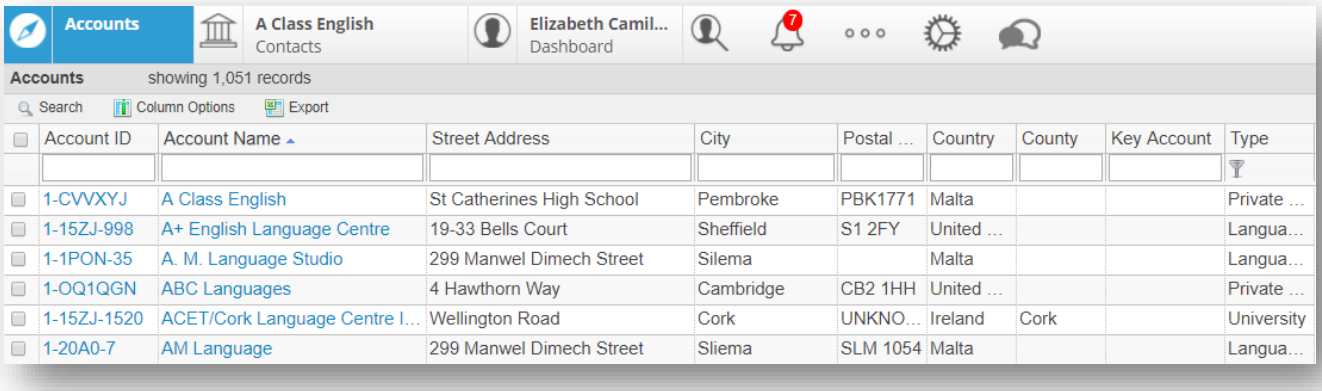
After you complete the account creation process, you can access your Cengage Learning eResources in the future at http://login.cengage.com. Simply sign in at Welcome! Returning users by entering your email address or User Name and selected password.

If you have any questions about accessing your account, please contact our Cengage Learning Support Team at 1-800-354-9706, option 7.

Thank you.

Exporting

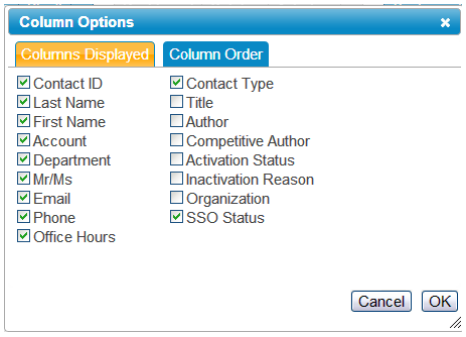
The export command button is located on the Action Bar. When you click the export button you are starting the process of exporting all of the records currently displayed in the view. If you executed a filter before clicking the button, then only those records displayed in the filtered list will be exported.

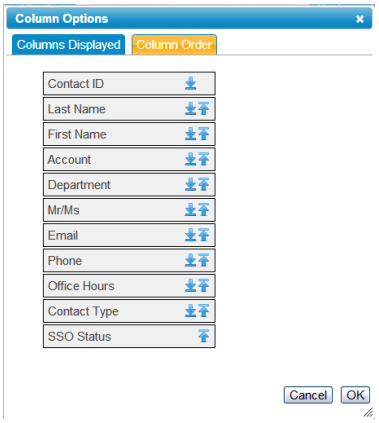


1. Select the view you want to export.

   Optional: apply a filter to the view.

2. Click the '**Export**' command button. A pop-up dialog box will appear allowing you to not only select the columns/fields you want to export, but also pre-set the order in which the columns/fields are presented in the output document. You can click the tabs at the top of the pop-up to adjust your selection(s).





3. Click the '**OK**' command button.
4. The exported data is in a file displayed in the lower left-hand corner of your screen.
5. Click the file name to launch the export results in Microsoft Excel.