



Mediaocean

Learning Plans

2019

Contents

Learning Plan for AV AdClock	3
Learning Plan for AV Broadcast	4
Learning Plan for AV Central Database Setup	6
Learning Plan for AV Financials	7
Learning Plan for AV Media Client Accounting	8
Learning Plan for AV Network	9
Learning Plan for AV Print	11
Learning Plan for AV Production	12
Learning Plan for DS Aura	14
Learning Plan for DS Brandoccean	15
Learning Plan - DealMaker	16
Learning Plan - DMD	17
Learning Plan for DS Client Accounting	18
Learning Plan for DS Corporate Accounting	20
Learning Plan for DS National	22
Learning Plan for DS Print	24
Learning Plan for DS Rep	25
Learning Plan for DS Spot	26
Learning Plan for DS Traffic	28
Learning Plan - Lumina Plan Management	29
Learning Plan for OX Digital	31
Learning Plan for OX DR	32
Learning Plan for OX Finance	34
Learning Plan for OX Net	35
Learning Plan for OX Print	37
Learning Plan for OX Production	38
Learning Plan for OX Spot	40
Learning Plan for Prisma	42
Learning Plan for Prisma for Sellers	44
Learning Plan - PROPOST	45
Learning Plan for Radia	46

Learning Plan for AV AdClock

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Classes are listed in the order in which they should be taken. Note that this is the recommended learning plan. Custom learning plans can be developed upon request.

Recommended Learning Plans	Role	Live Webinars	Video eLearning
AdClock Time <ul style="list-style-type: none"> Logging in and resetting passwords Adding timesheets Saving and Submitting timesheets for approval Working with timesheets Timesheet Reports Approving or rejecting timesheets Posting Timesheets 	All	1 hour	
AdClock Mobile Time <ul style="list-style-type: none"> Working with timesheets Saving timesheets Adding, copying and deleting timesheet rows Submitting timesheets 	All	1 hour	
AdClock Administrator Options <ul style="list-style-type: none"> System Setup Group Setup Group Reports Standard Comments Time Accounting Records Maintain Time Off Email Delinquent Time Time Exempt Clients 	All	2 hours	

Learning Plan for AV Broadcast

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Broadcast Database <ul style="list-style-type: none"> Buying & Buying Unit Profiles Demo Creation Daypart/Group Definition Ratings Survey Posting Definition Market Definition Matching profiles Rep Definition Station Definition Station Profiles Station Contact Definition Station Market Assignment User/Market/Client Distribution 	Admin	2 hours	
Broadcast Planning/Buying – Estimates & Imports <ul style="list-style-type: none"> Setting up Estimates Entering or Importing Station Avails Entering or Importing Market Goals Importing Buys 	Planners & Supervisors	2 hours	
Broadcast Planning/Buying - Prebuy <ul style="list-style-type: none"> Creating a worksheet Retrieve Avails Retrieve Ratings Trending/Estimating Entering & Approving Spots Reporting Customizing Worksheet 	Planners, Buyers, Supervisors	3 hours	
Broadcast Planning/Buying - Buying <ul style="list-style-type: none"> Entering and maintaining schedules Viewing Buy history Maintaining buys Entering makegoods 	Planners, Buyers Supervisors	2 hours	
Order Management – Order Valet <ul style="list-style-type: none"> Sending and receiving station Orders Making revisions 	Buyers	1.5 hours	
Recommended Learning Plans	Role	Live Webinars	Video eLearning
Broadcast Planning/Buying – Research <ul style="list-style-type: none"> Demographic Rating Display Program Ranker 	Planners & Buyers	2 hour	

<ul style="list-style-type: none"> • Radio Ranker • Radio Market Composition • AdHoc reporting 			
Broadcast Traffic <ul style="list-style-type: none"> • ISCI Definition • ISCI List • ISCI Rotation Definition • Traffic Comments • Traffic Instructions • Reports 	Traffic	2 hours	
Broadcast Affidavits – Entry/Reports/Inquiry <ul style="list-style-type: none"> • Affidavit Entry Match • Affidavit Matching Report • Affidavit Station Report • Affidavit Payment Inquiry 	Buyers	2.5 hours	
Broadcast Discrepancy Resolution <ul style="list-style-type: none"> • Resolving discrepancies in Buy Module • Requesting matching report 	Buyer	1.5 hours	
Broadcast EDI <ul style="list-style-type: none"> • EDI Affidavit Corrections • EDI Affidavit Entry • EDI Transmittal Status Report • Electronic Invoice Listing • Import EDI Affidavits 	Buyers	2.5 hours	
Broadcast Posting <ul style="list-style-type: none"> • Post Buy Item Report • Post Buy Market Detail • Post Buy Product Detail 	Buyers & Supervisors	1.5 hours	

Learning Plan for AV Central Database Setup

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Introduction to Mediaocean records <ul style="list-style-type: none"> • Understanding System Security • Menu/System Authority • Functional Security by user • Creating Clients • Creating Vendors • Creating Employee Records • Reports & Inquiries 	System Admin	2 hours	

Learning Plan for AV Financials

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Accounts Receivable (Cash Application) <ul style="list-style-type: none"> Entering Cash Receipts Applying unapplied cash Offsetting receivables Voiding Cash Receipts Writing-off receivables Billing Interface Reports & Inquiries AR Security 	Billers/Payers/ Accounts Receivable/ Accounts Payable	1.5 hours	
Accounts Payable (Vendor Charge Entry) <ul style="list-style-type: none"> Entering Vendor invoices Posting entries Reporting Reports & Inquiries Vendor Charge Security 	All	1.5 hours	
Payment Processing (Vendor disbursements) <ul style="list-style-type: none"> Selecting invoices for payment Requesting checks Updating the check register & posting to GL Voiding checks Manual checks Reports & Inquiries Payment Processing Security 	All	2 hours	
General Ledger System <ul style="list-style-type: none"> Journal Entries Recurring Journal Entries Reports & Inquiries Prepaid Expenses Accounting Period Control 	All	1.5 hour	
GL AdHoc Reports <ul style="list-style-type: none"> Creating & Recalling existing AdHoc formats Requesting AdHoc reports Working with reports (Balance Sheet & Income Statement) 	All	1.5 hours	
1099 & Year Reporting <ul style="list-style-type: none"> Processing 1099's Year End Open & Close 	All	1.5 hour	

Learning Plan for AV Media Client Accounting

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Media Client Accounting in Print, Broadcast & Network <ul style="list-style-type: none"> Billing Profile Definition Security Profiles – (Print Only) 	Admin	1.5 hours	
Generating Client Invoices in Print, Broadcast and Network <ul style="list-style-type: none"> Billing Request Live/Draft Bills Bill Reversal Bill Reprint Special Amount Billing Reports/Inquiries 	Billers	2.5 hours	
Managing Print Vendor Invoices in Print <ul style="list-style-type: none"> Run Payer’s List or Invoice Matching Report Match Vendor Invoices Working with discrepancies Deleting an invoice Clearing for payment A/P Offsets Clear Cash Receipts/Writeoffs Reports/Inquiries 	Payers	2.5 hours	
Broadcast Check Writing (Browser/MOCHA) <ul style="list-style-type: none"> Affidavit Clearance Creating Prepayments Opt. 81 – Check Request Opt. 84 – Void Checks Requesting reports 	Payers	1.5 hours	
Network Check Writing (Browser/MOCHA) <ul style="list-style-type: none"> Clear Invoices for Payment Opt. 273 – Print/Post Checks Opt. 274 – Post Void/Stop Pay Checks Opt. 255 – Enter/Reverse Cash Receipt Opt. 256 – Enter Invoice Offsets Reports/Inquiries 	Payers	1.5 hours	

Learning Plan for AV Network

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Network Database <ul style="list-style-type: none"> Buying Profiles Client Office Authorization Client User Authority Daypart Definition Estimate Type Matching Profiles Network/Syn Profiles Rep Definition 	Admin	2 hours	
Network Research <ul style="list-style-type: none"> Selecting/Viewing Research data Creating Program Profiles Quick Program Entry 	Researchers	2 hours	
Network Estimates & Goals <ul style="list-style-type: none"> Creating Estimates Entering Goals 	Planners	1 hour	
Network Buying <ul style="list-style-type: none"> Creating/maintaining packages Accept EDI contracts Creating a worksheet Adding & uploading units Maintaining schedules Reporting and filtering Creating preference templates 	Buyers	2.5 hours	
Network EDI <ul style="list-style-type: none"> Media Translation Definition Client Translation Definition Network Translation Definition Product Translation Definition Rep Translation Print Invoice Accept Invoices Accept Contracts 	Buyers	1.5 hours	
Network Invoice Matching <ul style="list-style-type: none"> Print Pre-Matching Report Enter/Match Invoices 	Buyers	2 hours	
Recommended Learning Plans	Role	Live Webinars	Video eLearning
Network Discrepancy Reconciliation <ul style="list-style-type: none"> Discrepancy Report Discrepancy Reconciliation 	Buyers	1 hour	

Network Posting <ul style="list-style-type: none"> • Audience Research Reports • Post by Program Summary • Post by Time Period 	Buyers	1.5 hours	
Network Traffic <ul style="list-style-type: none"> • ISCI Rotation Definition • ISCI Rotation Report • Schedule ISCI • Traffic Report 	Traffic	1.5 hours	

Learning Plan for AV Print

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Print Admin & Database <ul style="list-style-type: none"> Space Codes Rep Codes Market Definition Client/Office Authorizations User/Client Authorizations Security Profiles 	Admin	2 hours	
Print Buying <ul style="list-style-type: none"> Estimate Definition Standard Comments Creating & maintaining buy activity Discrepancy Resolution 	Buyers	2 hours	
Interactive Buying <ul style="list-style-type: none"> Estimate Definition Standard Comments Creating & maintaining buy activity Discrepancy Resolution 	Buyers	2 hours	
Out of Home Buying <ul style="list-style-type: none"> Estimate Definition Standard Comments Creating & maintaining buy activity Discrepancy Resolution OOH Contracts Order Status Inquiry 	Buyers	2.5 hours	
Print/Interactive Traffic <ul style="list-style-type: none"> Ad Number Definition (Optional) <ul style="list-style-type: none"> Ad Number Assignment Issuing Insertion Orders <ul style="list-style-type: none"> Traffic/Contract Alt Address Insertion Order Instructions I/O Address Maintenance Order Status Inquiry 	Buyers & Traffic	1.5 hours	
Reports/Inquiries <ul style="list-style-type: none"> AdHoc Inquiry Bill/Pay Inquiry Financial Status Inquiry Vendor Statement Inquiry Bill/Pay Historical Report 	Buyers	1.5 hours	

Learning Plan for AV Production

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Production Jobs <ul style="list-style-type: none"> • Adding and saving jobs • Accessing, editing and copying jobs • Searching for jobs • Closing, locking and deleting jobs • Reports & Inquiries 	All	1 hour	Review existing video
Production Estimates <ul style="list-style-type: none"> • Creating estimates • Changing and copying estimates • Submitting estimates for approval • Searching for estimates • Exporting estimates to PDF • Approving or rejecting estimates • Competitive Estimates • Reports & Inquiries • Maintenance & Security 	All	1.5 hour	Work in Progress
Production Purchase Orders <ul style="list-style-type: none"> • Creating production and expense orders • Submitting orders for approval • Approving or rejecting orders • Searching for orders • Working with orders • Exporting orders to PDF • Reports & Inquiries • Maintenance & Security 	All	1 hour	Review Existing Video
Charge Entry (Accounts Payable) <ul style="list-style-type: none"> • Entering Billable/Non-billable charges • Entering Internal charges/Fees • Transferring charges • Timesheet Transfer • Working with write offs • Reporting • Reports & Inquiries • Vendor Charge security 	All	2.5 hours	
Production Billing <ul style="list-style-type: none"> • Client Billing • Advance Billing (prebill) • Service Fee Billing • Credit Billing • Zero Final Billing • Printing • Reports & Inquiries • Security & Maintenance 	All	2.5 hours	
AdExpense <ul style="list-style-type: none"> • Creating, Editing, Submitting expense reports (Advances if needed) 	All	1 hour	

- Expense Inquiry
- Printing, emailing, and exporting expenses
- Approving or rejecting expense reports
- Posting Expense
- Reports & Inquiries
- Database & Administration Setup

Learning Plan for DS Aura

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Aura Time <ul style="list-style-type: none"> • Adding and saving timesheets • Submitting timesheets for approval • Working with timesheets • Exporting and printing timesheets • Previewing timesheets • Approving or rejecting timesheets 	All	1 hour	30 minutes
Aura Mobile Time <ul style="list-style-type: none"> • Working with timesheets • Entering time on the timesheet • Searching for timesheets • Saving timesheets • Adding, copying and deleting timesheet rows • Submitting timesheets 	All	1 hour	1 hour
Aura Approve Mobile <ul style="list-style-type: none"> • Viewing timesheets • Approving multiple timesheets • Reviewing timesheets • Approving or rejecting timesheets 	All	1 hour	
Aura Jobs <ul style="list-style-type: none"> • Adding and saving jobs • Submitting jobs for approval • Accessing, editing and copying jobs • Searching for jobs • Closing, locking and deleting jobs • Approving or rejecting jobs 	All	1 hour	30 minutes
Aura Estimates <ul style="list-style-type: none"> • Creating estimates • Accessing estimates • Changing and copying estimates • Submitting estimates for approval • Searching for estimates • Exporting estimates to PDF • Approving or rejecting estimates 	All	1 hour	
Aura Orders <ul style="list-style-type: none"> • Creating production and expense orders • Submitting orders for approval • Approving or rejecting orders • Searching for orders • Working with orders • Exporting orders to PDF 	All	1 hour	

Learning Plan for DS Brandoccean

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Entering and Maintaining Timesheets <ul style="list-style-type: none"> • Creating timesheets • Editing timesheets • Approving or rejecting timesheets • Summarizing timesheet data (Reporting) 	All	1 hour	20 minutes
Creating and Maintaining Jobs in Jobs Dashboard <ul style="list-style-type: none"> • Opening jobs • Editing jobs • Approving or rejecting • Printing, emailing, and exporting jobs and reports 	All	1 hour	30 minutes
Entering and Maintaining Estimates <ul style="list-style-type: none"> • Creating estimates • Editing and reconciling estimates • Approving or rejecting estimates • Printing, emailing, and exporting estimates • Working with multiple estimates 	All	1.5 hours	
Creating and Maintaining Production and Expense Orders <ul style="list-style-type: none"> • Creating production and expense orders • Editing orders • Approving or rejecting orders • Printing, emailing, and exporting orders and reports 	All	1.5 hours	
Creating and Maintaining Expense Reports <ul style="list-style-type: none"> • Creating expense reports • Editing expense reports • Approving or rejecting expense reports • Customizing the expense report list • Printing, emailing, and exporting expenses 	All	1 hour	10 minutes

Learning Plan - DealMaker

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Recommended learning plans	Type of the class	Roles	Quick card
Deal Planning <ul style="list-style-type: none"> • Open Deal Window • Deal Header • Deal Grid: Creating a Proposal • Deal Guarantee and Options • Change Deal Status 	In Person (2 hours) eLearning (Coming Soon)	Sales Planner	<ul style="list-style-type: none"> o Creating a Deal Header o Working in the Deal o Preemption Report o Importing External Deals
Deal Maintenance <ul style="list-style-type: none"> <input type="checkbox"/> Understand the deal maintenance workflow <input type="checkbox"/> Revising the Deal <input type="checkbox"/> Branding units <input type="checkbox"/> Taking Cancellation Options <input type="checkbox"/> Handling Preemptions <input type="checkbox"/> Reporting <input type="checkbox"/> Trafficking 	In Person (2 hours) eLearning (Coming Soon)	Sales Assistant	<ul style="list-style-type: none"> o Cancellation Options o Deal Maintenance o Resolving Preempts
Sales Management Reporting <ul style="list-style-type: none"> <input type="checkbox"/> Understanding the Reports <input type="checkbox"/> Setting templates 	eLearning (Coming Soon)	Pricing & Planning Sales Planner	<ul style="list-style-type: none"> o SMR Reports
Approvals <ul style="list-style-type: none"> <input type="checkbox"/> Approvals Setup <input type="checkbox"/> Understanding Approvals Process <input type="checkbox"/> Approval Report <input type="checkbox"/> Approval Emails 	In Person (2 hours) eLearning (Coming Soon)	Sales Assistant Sales Planner Administrator Pricing & Planning	
Rate Card <ul style="list-style-type: none"> <input type="checkbox"/> Creating Selling Titles <input type="checkbox"/> Creating a Rate Card <input type="checkbox"/> Adding Audience Estimates <input type="checkbox"/> Releasing a Rate Card 	In Person (2 hours)	Administrator Pricing & Planning	<ul style="list-style-type: none"> o Audience Estimates o Creating a Selling Title o Creating a Rate Card o Releasing a RC
Stewardship <ul style="list-style-type: none"> <input type="checkbox"/> Setup <input type="checkbox"/> Reporting <input type="checkbox"/> Liability Adjustments 	In Person (2 hours)	Pricing & Planning Sales Planner	<ul style="list-style-type: none"> o Stewardship Delivery Report o Adding ADUS and Liability Adjustments o Closing a Deal o Stewardship Deal Summary Report

Learning Plan - DMD

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Recommended learning plans	Type of the class	Roles	Quick card
Inventory /Rate Card <ul style="list-style-type: none"> The building blocks of the Inventory Tab Combining building blocks View, create, and manage targeting rules, attributes, and products How to create and price your products on the RC 	In-person (2 hours)	Pricing & Planning	o Building blocks
Deal 1: Introduction to Deal <ul style="list-style-type: none"> The Deal Hierarchy and Workflow Introduction to the Home page Create a deal and proposal Deal structure to accommodate Addressable, Digital and VOD 	In-person (2 hours) eLearning (coming soon)	Assistant/Planners	o Deal Hierarchy o Adding an Addressable Line o Working in Deal Grid
Deal 2: Orders, Approvals, Traffic & Delivery <ul style="list-style-type: none"> How to take a proposal to order How to traffic your deal Tracking order delivery Understanding the approvals process Order Maintenance 	In-person (2hours) eLearning (coming soon)	Assistant/Planners	o Order Maintenance (Coming Soon)
Billing/Invoicing <ul style="list-style-type: none"> How to configure the invoice settings on your deal How to structure your IOs to produce invoices How to generate invoices Edit/ adjustments Push invoices to AR 	In-person (2 hours)	Finance	



Learning Plan for DS Client Accounting

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Client Accounting Overview <ul style="list-style-type: none"> Agency Workflow Introduction to media billing, agency commission, bill formulas Introduction to Receiving vendor invoices Introduction to Vendor invoice matching and resolving discrepancies Introduction to Approving (clearing) vendor invoices Introduction to Vendor Disbursements Introduction to Cash Application Introduction to Month end reconciliation 	Billers/Payers	1.5 hours	
Introduction to MediaOcean records <ul style="list-style-type: none"> Understanding the System Security Reviewing basic record structure in SFM Reviewing Client, Product, Estimate, UDEF and UCOMM records Reviewing Market, Master, Address and Rep records for Local & National Vendors Listing and viewing Print Vendor Records in Pubfile 	Billers/Payers	2.5 hours	
Generating Client Invoices in Spot, National and Print Toolkit <ul style="list-style-type: none"> Reporting billable dollars Understanding bill types Requesting billing in Spot, National and Print Toolkit Reversing an incorrect bill Printing billing with a logo via Archive Reporting billed dollars Using the Transfer program (Financial Toolkit) 	Billers	2.5 hours	
Managing Electronic Vendor Invoices in National and Spot Toolkit <ul style="list-style-type: none"> Managing electronic invoices in EASI Working with batches Converting invoices into NINV Deleting and restoring invoices Requesting the Invoice Facsimile Report (Z9) 	Payers	2.5 hours	
Managing Print Invoices in Print Buy Toolkit <ul style="list-style-type: none"> Downloading Insertions Attaching an invoice to insertions Working with discrepancies Deleting an invoice Clearing for payment Reviewing invoice history Reporting in Print Buy Toolkit 	Payers	2.5 hours	



Recommended Learning Plans	Role	Live Webinars	Video eLearning
Requesting Spot, National and Print Toolkit Writer reports <ul style="list-style-type: none"> • Listing/displaying/recalling Writer report formats • Understanding the components of a Writer report • Using various Writer report actions • Requesting Writer reports 	Billers/Payers	1.5 hours	
Financial Information System (FIS) <ul style="list-style-type: none"> • Specifying the Request Info • Using FIS with Grids features • Understanding the types of financial information available 	Billers/Payers/ Accounts Receivable/ Accounts Payable	1.5 hours	
Scribe reporting in Financial Toolkit <ul style="list-style-type: none"> • Understanding the different Scribe types • Listing/displaying/recalling Scribe formats • Understanding the components of a Scribe report • Reviewing the Scribe screens • Requesting Scribe RCV reports 	Billers/Payers/ Accounts Receivable/ Accounts Payable	1.5 hours	
Cash Application <ul style="list-style-type: none"> • Using the Transfer program • RCV program overview • Applying and unapplying cash • Applying unapplied cash • Offsetting receivables • Writing-off receivables • Transferring receivable balances • Splitting receivable amounts • Reporting on receivable dollars 	Accounts Receivable	3 hours	
Vendor Disbursements in Financial Toolkit <ul style="list-style-type: none"> • Understanding the types of checks • Using reports to determine payable dollars • Controlling check run output using Marker • Requesting checks • Using reports to verify paid dollars • Recording a manual check • Voiding a check 	Accounts Payable	3 hours	



Learning Plan for DS Corporate Accounting

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Financial Foundations <ul style="list-style-type: none"> Listing files online Processing Transaction Reporting 	All	2.5 hours	
Entering Batch Transactions <ul style="list-style-type: none"> Working with batches Entering billable and non-billable charges Entering split invoices Entering Internal charges/Fees Transferring charges Working with write offs and recoveries Making journal entries Estimating production Using batch actions Reporting on input 	All	2.5 hours	
Input – Entering type 10 transactions <ul style="list-style-type: none"> Using purchase orders to enter invoices Using multiple item entry screens Entering split invoices Working with additional features 	All	1.5 hours	
Cash Application <ul style="list-style-type: none"> Using the Transfer program RCV program overview Applying and unapplying cash Applying unapplied cash Offsetting receivables Writing-off receivables Transferring receivable balances Splitting receivable amounts Reporting on receivable dollars 	All	1.5 hours	
Financial Information System (FIS) <ul style="list-style-type: none"> Navigating and customizing the FIS screen Exporting/Printing FIS reports 	All	1 hour	
Reviewing Financial Toolkit record structure <ul style="list-style-type: none"> Using the account file maintenance (AFM) program Setting up a vendor in Financial Toolkit Setting up client and product records in Financial Toolkit Setting up jobs in Financial Toolkit Setting up Person in Financial Toolkit Setting up Transfer Records in Financial Toolkit Reporting on record set-up 	All	2.5 hours	



Recommended Learning Plans	Role	Live Webinars	Video eLearning
Designing and Requesting Financial Toolkit Scribe reports <ul style="list-style-type: none"> • Recalling existing scribe formats • Setting up report formats • Using Scribe features • Requesting Scribe reports 	All	2 hours	
WebSeries Check Printing <ul style="list-style-type: none"> • Introduction to vendor disbursements • Printing checks using Webseries 	All	1 hour	
Accent – Requestable Reports <ul style="list-style-type: none"> • Requesting a report • Opening a saved report • Expanding and collapsing views • Displaying Analysis information • Quick filtering the report • Changing reporting levels • Customizing columns • Changing headers and footers • Saving and applying a template • Printing and exporting a report • Saving a report 	All	1 hour	
Accent – Scheduled Reports <ul style="list-style-type: none"> • Accessing scheduled reports • Expanding and collapsing views • Displaying analysis information • Quick filtering the report • Changing the reporting levels • Customizing columns • Changing headers and footers • Saving and applying a template • Printing and exporting a report • Saving a report 	All	1 hour	



Learning Plan for DS National

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National Broadcast and Ratings 101 <ul style="list-style-type: none"> Advertising overview Five main components of the advertising industry Advertising industry key terms Advertising workflow 	Researchers, Planners, & Buyers	1 hour	30 minutes
National Demo Estimator <ul style="list-style-type: none"> Downloading research data Viewing and selecting data Adding demographic estimates Create program records Reviewing and change program records Uploading program records Updating existing program records 	Researchers, Planners, & Buyers	2 hours	20 minutes
Research Writer <ul style="list-style-type: none"> Creating a report Designing a report layout Using report-level options Ranking Working with reports Storing reports 	Researchers, Planners, Buyers & Supervisors	1 hour	45 minutes
Estimates & Goals <ul style="list-style-type: none"> Understanding National file structure Setting up basic records Entering goals 	Planners	1 hour	15 minutes
National Prebuy <ul style="list-style-type: none"> Entering plan details Adding programs Scheduling units Applying guarantees Reporting Uploading plans to National Buy Toolkit Exporting and emailing reports 	Buyers	2.5 hours	25 minutes
National Buy Toolkit <ul style="list-style-type: none"> Maintaining packages Adding and uploading units Maintaining schedules Reporting and filtering Creating templates 	Buyers	2.5 hours	70 minutes



Recommended Learning Plans	Role	Live Webinars	Video eLearning
Electronic Cable Orders <ul style="list-style-type: none"> • Requesting the Package Header report • Viewing the EDI mailbox • Uploading original orders • Processing revisions • Resolving units in the National Toolkit inventory pane • Resolving units in the revisions pane • Uploading changes to National Toolkit • Emailing Notice of Change report 	Buyers	2 hours	20 minutes
National Reporting NetWriter <ul style="list-style-type: none"> • Designing and changing NetWriter reports • Requesting NetWriter reports • Viewing, printing and saving reports • Requesting reports in Net Toolkit 	Planners, Buyers & Supervisors	2 hours	20 minutes
Brand Allocation and Ownership <ul style="list-style-type: none"> • Setting up for Brand Allocation • Requesting Brand Allocation reports • Working in Brand Ownership 	Buyers	2 hours	15 minutes
National Invoice Toolkit <ul style="list-style-type: none"> • Preparing for Invoice Matching • Working with the Invoice Matching report • Using Matchmaker 	Buyers	2 hours	20 minutes
National Posting <ul style="list-style-type: none"> • Posting network, syndication, and cable • Running the Seed report • Posting NTI codes manually 	Buyers & Supervisors	1.5 hours	15 minutes



Learning Plan for DS Print

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Buying Print and OOH Media <ul style="list-style-type: none"> Setting up estimate records Creating and modifying insertions Understanding the upload/download process Creating reports 	Buyers	2.5 hours	90 minutes
Sending Enhanced Insertion Orders <ul style="list-style-type: none"> Identifying orders to send Managing Ad Codes Generating original, revised and cancelled EIOs Generating Space Reservations Reviewing Print Buy Toolkit preferences Setting up email contact lists 	Buyers	2 hours	1 hour
Resolving Discrepancies <ul style="list-style-type: none"> Resolving discrepant invoices Using discrepancy resolution reports 	Buyers	1 hour	25 minutes
PrintWriter <ul style="list-style-type: none"> Designing and changing PrintWriter reports Requesting PrintWriter reports Viewing, printing and saving reports Requesting reports in Print Toolkit 	Buyers & Supervisors	2 hours	1 hour



Learning Plan for DS Rep

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Proposer <ul style="list-style-type: none"> • Creating avails • Creating a package • Using XML format 	Reps	1 hour	40 minutes
Local Demo Analyzer <ul style="list-style-type: none"> • Creating a basic request • Working with report options • Formatting the report • Listing what's online • Saving and retrieving requests and reports • Frequently asked questions 	Reps	1 hour	15 minutes
Station Toolkit <ul style="list-style-type: none"> • Reviewing orders • Confirming orders • Sending makegoods 	Stations		40 minutes
DARE <ul style="list-style-type: none"> • Processing new orders • Processing makegood offers • Working with revisions 	Reps	1 hour	45 minutes



Learning Plan for DS Spot

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Local Broadcast and Ratings 101 <ul style="list-style-type: none"> Advertising overview Five main components of the advertising industry Advertising industry key terms 	Planners & Buyers	1 hour	1 hour
Estimates and Goals <ul style="list-style-type: none"> Setting up estimates Entering goals Recalling and changing goals Viewing goals in MIS Viewing, printing and saving reports 	Planners & Buyers	2 hours	55 minutes
Spot Authorization Tracking (Optional) <ul style="list-style-type: none"> Open and review authorizations Claim authorizations Submit the Buy for Approval Claim Cancellations View Authorization History 	Planners & Supervisors	2.5 hours	75 minutes
Local Demo Analyzer <ul style="list-style-type: none"> Creating a basic request Working with report options Formatting the report Listing what's online Saving and retrieving requests and reports Frequently asked questions 	Planners, Buyers, Supervisors	1 hour	15 minutes
TV Prebuy <ul style="list-style-type: none"> Adding avails Working with revised proposals Researching and evaluating Using the worksheet to put together schedules Reporting Customizing Spot Buy Toolkit 	Buyers	2.5 hours	100 minutes
Radio Prebuy <ul style="list-style-type: none"> Using Radio Research tools Creating worksheets Adding avails Researching and evaluating Assembling schedules in the worksheet Reporting Working with spill Claiming Cancellations Viewing Authorization History 	Buyers	2.5 hours	100 minutes



Recommended Learning Plans	Role	Live Webinars	Video eLearning
Tracking Authorizations in Spot Buy Toolkit (Optional) <ul style="list-style-type: none"> Opening and reviewing authorizations Claiming authorizations Submitting the buy for approval Viewing Authorization History 	Buyers	1 hour	20 minutes
Buy Management 1 – Buys and Orders <ul style="list-style-type: none"> Getting started in the buysheet Using the buysheet Sending orders electronically Tracking orders Revising and managing orders Maintaining Personal Directories 	Buyers	2.5 hours	90 minutes
Buy Management 2 – Makegoods & Revisions <ul style="list-style-type: none"> Setting up subscriptions and viewing My Orders/My Offers Receiving makegood offers Maintaining schedules in the Buysheet Requesting reports Working with revisions Viewing, printing and saving reports Working with Writer options 	Buyers	2.5 hours	90 minutes
SpotWriter <ul style="list-style-type: none"> Designing and changing SpotWriter reports Requesting SpotWriter reports Viewing, printing and saving reports Requesting reports in Spot Toolkit 	Planners, Buyers, Supervisors	2.5 hours	40 minutes
Spot Invoice Toolkit – Resolving Discrepancies <ul style="list-style-type: none"> Preparing for invoice matching Resolving discrepancies with Spot Invoice Toolkit 	Buyers	2 hours	1 hour
Posting Local Broadcast <ul style="list-style-type: none"> Requesting posting reports Viewing, printing and saving reports Requesting lock-in reports 	Buyers & Supervisors	1.5 hours	25 minutes



Learning Plan for DS Traffic

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Local Broadcast and Ratings 101 <ul style="list-style-type: none"> Advertising overview Five main components of the advertising industry Advertising industry key terms Advertising workflow 	Trafficker	1 hour	1 hour
Spot Traffic <ul style="list-style-type: none"> Setting up files to traffic local broadcast Determining what needs to be trafficked Requesting instructions Reporting traffic information 	Trafficker	2.5 hours	1 hour
National Broadcast and Ratings 101 <ul style="list-style-type: none"> Advertising overview Five main components of the advertising industry Advertising industry key terms Advertising workflow 	Trafficker	1 hour	1 hour
National Traffic <ul style="list-style-type: none"> Preparing for National traffic Determining what needs to be trafficked Assigning commercials to units Requesting instructions 	Trafficker	2.5 hours	1 hour



Learning Plan - Lumina Plan Management

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Recommended learning plan	Type of class	Role	eLearning	Quick card
Introduction to Lumina Plan Management <ul style="list-style-type: none"> • What is plan management? • Home Page and navigation • Working with plans • Communicate and collaborate • Files and Creative • Build and save reports 	Webinar (1 hour) *Monthly Go-To webinar offered	Any	Plan Management Overview	
In-person Introduction to Lumina <ul style="list-style-type: none"> • What is plan management? • Home Page and navigation • Creating a new plan • Working with flights • Approvals and Authorizations • Customizing the plan view • Build and save reports 	In-person (2 hours 30 mins)	Media planner/Buyer	Plan Management Overview	
Lumina Plan Entry <ul style="list-style-type: none"> • Creating a new plan • Creating flights • Flight workflow • Sending plans and flights for client approval • Customizing the plan view • Creating a report 	Hands-on-Learning Lab (2 hours) *Monthly Hands-on-Learning webinar offered	Media Planner/Buyer	- Create a New Plan - Working with Flights - Working with Flights	- Working with Plans - Flying - Customizing the Flowchart
Approvals and Authorizations <ul style="list-style-type: none"> • Sending media plans for approval • Authorization requests 	Hands-on-Learning Lab (30 mins)	Media Planner & Plan Approver		Approvals & Authorizations
Importing and Exporting Vendor Details <ul style="list-style-type: none"> • Exporting the excel template • Preparing your excel document • Importing and mapping fields • Saving your imported row(s) 	eLearning Hands-on-Learning Lab (1 hour)	Media Planner/Buyer	Importing & exporting vendor details	Importing & exporting vendor details



Building and Working with Reports <ul style="list-style-type: none"> • Viewing existing report templates • Creating new reports • Customizing and saving a report 	eLearning	Advertiser, Media Planner & Global Agency Team	Lumina Plan Management Reporting	Reporting
Admin Module <ul style="list-style-type: none"> • Admin Module <ul style="list-style-type: none"> ▪ User Manager ▪ Data Manager ▪ Currency Exchange Rates *Global Admins only • Hands-on activity 	In-person/ Webinar (1 hour)	Global/Limited Administrator	Lumina Admin module overview video	<ul style="list-style-type: none"> - Currency Exchange - User Group Assignments



Learning Plan for OX Digital

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Recommended Learning Plans for OX	Role	Instructor-Led	Live Webinars	Video eLearning
Digital Buying <ul style="list-style-type: none"> Setting up Estimates, BA, and Campaigns Generating and creating placement templates Entering and executing buys Generating Insertion Orders Reviewing Digital Dashboard 	Buyers	2 hours	2 hour	✓
Pending Revisions/ RFI/ Cost Audit <ul style="list-style-type: none"> Adding, Making Revisions to, and Cancelling Placements RFI (Request for Invoice) process Cost Auditing Process (Invoice Discrepancy Resolution) 	Buyers	2 hours	2 hour	✓
Financial Inquiry/Reporting <ul style="list-style-type: none"> Generating reports 	Buyers	1 hour	1 hour	✓



Learning Plan for OX DR

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Recommended Learning Plans for OX	Role	Live Webinars	Video eLearning
Spot Feed and Response Feed Imports <ul style="list-style-type: none"> • BVS Hotlist <ul style="list-style-type: none"> ○ File Upload ○ Assignments ○ Matching spots to buys • BVS Network/Station ID Cross Reference • Mass BVS Update (Mass Change) • BVS Raw Report • Telemarketing Hotlist <ul style="list-style-type: none"> ○ File upload ○ Locating Header records ○ Assignments ○ Auditing file details ○ Matching responses to spots ○ Troubleshooting Errors ○ Weight Audit Report* (as needed) • Mass TMK Response Update • Telemarketer response data report 	Agency dependent	3 hours	
Direct Manager <ul style="list-style-type: none"> • Manual exact time entry • Reconciling exact time discrepancies • Match/Unmatch Exact times • Viewing and Analyzing Spot and Response data 	Buyers, Account managers	2 hours	
Research and Reporting <ul style="list-style-type: none"> • Cross System Reporter- Designing and saving reports • Network Research Reporter - Requesting Network research data • Telemarketing Reports • Spot Data Reports 	Buyers	3 hours	
Broadcast Traffic: Spot Traffic for Direct Response <ul style="list-style-type: none"> • Phone Number Maintenance (includes URL and SMS Response Mechanisms) • Traffic Activity Report • Working within the Traffic Hotlist <ul style="list-style-type: none"> ○ -ISCI Entry with Phone Number Assignment ○ -Generating and Sending instructions • DR Traffic Reports 	DR traffic	2.5 hours	

<ul style="list-style-type: none"> Traffic upload 		
<p>Broadcast Traffic: Network Traffic for Direct Response (add on to Spot Traffic)</p> <ul style="list-style-type: none"> Network Pattern Maintenance Working with the Traffic Hotlist Generating and Sending Instructions 	<p>DR traffic</p>	<p>1.5 hours</p>



Learning Plan for OX Finance

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Recommended Learning Plans for OX	Role	Live Webinars	Video eLearning
Billing			
<ul style="list-style-type: none"> Generating Client Billing Reversal Billing Reviewing and reporting on billing history 	Billers	3 hours	
Paying			
<ul style="list-style-type: none"> Working with Electronic Vendor Invoices Manually Entering Vendor Invoices Paying Vendor Invoices & Reversing Paid Vendor Invoices Reviewing and reporting on payment history 	Payers	2.5 hours	
Accounts Receivable (AR)			
<ul style="list-style-type: none"> Entering and maintaining Client Cash Receivables Managing and reporting on Client Invoice Payment Collections Run AR Financial Inquiry to view open & paid items online AR reporting 	Accounts Receivable	2.5 hours	
Accounts Payable (AP)			
<ul style="list-style-type: none"> Run AP Financial Inquiry to view open & paid items online Write checks Check Reprint Request AP reporting 	Accounts Payable	2.5 hours	



Learning Plan for OX Net

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Recommended Learning Plans for OX	Role	Live Webinars	Video eLearning
National Master Files <ul style="list-style-type: none"> Creating and maintaining core files and records at the location level Network Client Profile Invoice Matching Profile, Setting up Dayparts Seed Profiles 	Administrators	2 hours	
National Broadcast 101 <ul style="list-style-type: none"> Advertising overview Five main components of the advertising industry Advertising industry key terms Advertising workflow 	Researchers, Planners, Buyers, Traffic	1 hour	✓
Research and Program Inventory <ul style="list-style-type: none"> Analyzing NTI, NSS, NAD and additional data types in reports Program Inventory: Creating and maintaining program records 	Researchers	2 hours	✓
Prebuy <ul style="list-style-type: none"> Creating schedules by reviewing plans Comparing proposals and historical data 	Buyers	2 hours	✓
Buy Maintenance <ul style="list-style-type: none"> Entering and maintaining estimates, packages, and schedules 	Buyers	2 hours	✓
Deal Exchange <ul style="list-style-type: none"> Working with EDI contracts to review, analyze, and upload into Buy Maintenance program 	Buyers	1 hour	✓
Goals & Allocations <ul style="list-style-type: none"> Entering, uploading, and maintaining goals Reporting on brand allocations 	Buyers	2 hours	✓
Discrepancy Resolution <ul style="list-style-type: none"> Matching vendor invoices to schedules 	Buyers	2 hours	✓
Posting <ul style="list-style-type: none"> Generating Seed Report 	Buyers, Supervisors	1 hour	✓



<ul style="list-style-type: none">Analyzing post reports and options			
Designing and Requesting Reports <ul style="list-style-type: none">Working with basic design elements, creating custom reports, recalling and saving templates	Planners, Buyers, Supervisors	2 hours	✓
Traffic <ul style="list-style-type: none">Working with Traffic HotlistGenerating traffic reportsFaxing recordsSending instructions	Traffic, Buyers, Planners, and Finance	2 hours	✓



Learning Plan for OX Print

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Recommended Learning Plans for OX	Role	Live Webinars	Video eLearning
Print Master Files <ul style="list-style-type: none"> • Creating and maintaining core files and records at the location level • Master file programs include: <ul style="list-style-type: none"> ○ General Profile ○ Client Billing Profile ○ Estimate Profile ○ Pub File Maintenance ○ Space Codes, Cost Codes ○ Where Codes ○ Insertion Order Footer Text ○ Cost Code Maintenance ○ Plan Header Profile ○ Media type Maintenance ○ Print Market Maintenance ○ Rate Type Maintenance 	Admin	2 hours	
Print Buy Maintenance <ul style="list-style-type: none"> • Working with estimates • Creating & maintaining buys • Issuing Insertion Orders • Generating Space Reservations 	Buyers	3 hours	✓
Discrepancy Resolution <ul style="list-style-type: none"> • Reviewing best practices methods for resolving discrepancies 	Buyers	1 hour	✓
Reporting <ul style="list-style-type: none"> • Requesting hard-coded reports, recalling and saving report requests 	Buyers, Supervisors	2 hours	



Learning Plan for OX Production

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Tempo Time Entry <ul style="list-style-type: none"> • Creating timesheets • Opening existing timesheets • Entering time • Submitting a timesheet • Retracting a timesheet • Using Personal Lists • Approving or rejecting timesheets 	All	1 hour	
Financial Foundations <ul style="list-style-type: none"> • Understanding Mediaocean file organization • Listing files online • Processing Transactions • Reporting 	All	2.5 hours	
Entering Batch Transactions <ul style="list-style-type: none"> • Working with batches • Entering Billable charges • Entering non-billable charges • Entering split invoices • Entering Internal charges/Fees • Transferring charges • Working with write offs and recoveries • Making Journal entries • Estimating production • Using batch actions • Reporting on input 	All	2.5 hours	
Input – Entering type 10 transactions <ul style="list-style-type: none"> • Using purchase orders to enter invoices • Using multiple item entry screens • Entering split invoices • Working with additional features 	All	1.5 hours	
Production – Client Group billing <ul style="list-style-type: none"> • Estimating production • Preparing to bill • Prebilling • Allocating charges • Client group billing • Printing • Billing reporting 	All	2.5 hours	

Recommended Learning Plans	Role	Live Webinars	Video eLearning
Production – Client billing <ul style="list-style-type: none"> • Estimating production • Preparing to bill • Holding charges • Requesting and reversing billing • Working with reports 	All	2.5 hours	
Recalling and requesting Scribe reports <ul style="list-style-type: none"> • Recalling existing scribe formats • Requesting scribe reports • Working with reports 	All	1.5 hours	
Designing and requesting Scribe reports <ul style="list-style-type: none"> • Recalling existing scribe formats • Setting up report formats • Using Scribe features • Requesting Scribe reports 	All	2 hours	
Financial Information System <ul style="list-style-type: none"> • Navigating and customizing the FIS screen • Exporting and Printing FIS reports 	All	1 hour	
Vendor disbursements <ul style="list-style-type: none"> • Using reports to determine billable dollars • Controlling check run output using marker • Requesting checks • Updating the check register • Stacking check requests • Using reports to verify paid dollars • Voiding a check • Recording a manual check 	All	2.5 hours	



Learning Plan for OX Spot

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Recommended Learning Plans for OX	Role	Live Webinars	Video eLearning
Local Broadcast 101 <ul style="list-style-type: none"> Advertising overview Five main components of the advertising industry Advertising industry key terms 	Planners, Buyers, Traffic	1 hour	✓
Spot Master Files <ul style="list-style-type: none"> Creating and maintaining core files and records at the location level Programs include: <ul style="list-style-type: none"> Spot Client Profile Billing Profile Traffic Profile Invoice Matching Profile Estimate Profile User Security Cost Type Maintenance Length Maintenance 	Admin	1.5 hours	
Estimates and Goals <ul style="list-style-type: none"> Setting up estimates Entering goals Uploading goals Requesting Brand Media reports 	Planners	2 hours	✓
TV and Radio Research <ul style="list-style-type: none"> Researching data including <ul style="list-style-type: none"> Nielsen Arbitron other data types Customizing reports and saving report templates 	Planners, Buyers, Supervisors	1.5 hours	✓
Prebuy <ul style="list-style-type: none"> Working in Spot pre-buy Uploading avails Pre-buy reporting 	Buyers	3 hours	✓
Buy Maintenance <ul style="list-style-type: none"> Entering and maintaining schedules Viewing buy history 	Buyers	2 hours	✓



<ul style="list-style-type: none"> • Maintaining buys • Entering manual makegoods • Requesting Brand Time and Brand Performance reports • Recalling saving report requests 				
Order Management <ul style="list-style-type: none"> • Sending and receiving station orders electronically • Maintaining buys and makegoods electronically 	Buyers	1.5 hours	✓	
Discrepancy Resolution <ul style="list-style-type: none"> • Resolving discrepancies with EZ match • Requesting invoice control report • Requesting matching reports 	Buyers	2 hours	✓	
Designing and Requesting Reports <ul style="list-style-type: none"> • Reporter overview • Creating custom reports • Recalling and saving templates 	Planners, Buyers, Supervisors	2 hours	✓	
Posting Local Broadcast <ul style="list-style-type: none"> • Requesting post reports • Working with sweep and brand performance reports 	Buyers, Supervisors	2 hours	✓	
Traffic <ul style="list-style-type: none"> • Working within the Traffic Hotlist • Generating traffic letters and shipping lists • Sending instructions 	Traffic	2.5 hours	✓	

Learning Plan for Prisma



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Recommended Learning Plans for Planners	Role	In-person	Live Webinars	Video eLearning
Digital 101 <ul style="list-style-type: none"> Introduction to digital advertising The basics of digital media The role of the agency How the success of campaigns are measured Campaign life cycle 	Buyers & Planners	N/A	N/A	1 hour
Prisma Campaign Management (Class 1 of 2) <ul style="list-style-type: none"> Introduction to Prisma campaign Management and interactive workflow Establishing the campaign details Working with proposals (RFPs) Building a media plan Sending estimated financial details to your accounting system (initiating the bill/pay process) Sending and monitoring orders (IOs) Sending placement details to the Ad Server 	Buyers & Planners	2.5 hours	2 hours	1 hour
Prisma Campaign Optimization & Reconciliation with the Actualization module (Class 2 of 2) <ul style="list-style-type: none"> Review class 1 Optimizing existing placements Analyzing ad server delivery data Actualization of a media plan Reconciliation Reporting overview 	Buyers & Planners	2 hours	1.5 hours	1 hour
Prisma Campaign Optimization & Reconciliation Using Prisma Invoices (Class 2 of 2) <ul style="list-style-type: none"> Review class 1 Optimizing existing placements Analyzing ad server delivery data Reconciliation via the Invoices module Reporting overview 	Buyers & Planners	2 hours	1.5 hours	1 hour
Prisma Campaign Management – Search Order <ul style="list-style-type: none"> Prisma overview Adding a search campaign Adding and sending search orders Sending estimated billing Pulling deliveries from integrated partners Reconciliation via actualization/Invoices module 	Buyers & Planners	2.5 hours	2 hours	N/A



Recommended Learning Plans – <i>Finance only</i>	Role	In-person	Live Webinars	Video eLearning
Managing supplier invoices with the Invoices Module <ul style="list-style-type: none"> • Prisma navigation and workflow • Navigating the Invoices module • Download list of Invoices to Excel • Add the following for one or more Insertion Orders <ul style="list-style-type: none"> ○ Invoice ○ Credit Memo ○ Cash Receipt ○ Adjustment 	Finance	1.5 hours	1.5 hours	N/A
Invoice Reconciliation – what does the Planner do? (To be customized to incorporate your workflow) <ul style="list-style-type: none"> • Review the Planner’s workflow in Prisma after an Invoice/credit memo/cash receipt/adjustment is attached <ul style="list-style-type: none"> ○ Reconciling from within the campaign ○ How to reconcile an invoice from within the New Invoice Module 	Finance	0.5 hours	0.5 hours	N/A



Learning Plan for Prisma for Sellers

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Recommended Learning Plans	Role	Live Webinars	Video eLearning
Prisma For Sellers <ul style="list-style-type: none">• Create proposals and enter placements• Respond to Insertion Orders• Revise live Insertion Orders	Buyers & Publishers	1 hour	1 hour



Learning Plan - PROPOST

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Recommended learning plans	Type of the class	Roles	Quick card
<p>Posting & Launch Pad</p> <p>Posting</p> <ul style="list-style-type: none"> • Navigating Spot Performance • Navigating Order Performance • Ad Hoc Reporting • Unclaimed Spots • Summary reports <p>Launch Pad</p> <ul style="list-style-type: none"> • Saving, removing and running favorite views 	In-person (2 hours)	Any	<ul style="list-style-type: none"> o Order Performance o Spot Performance o Unclaimed Spots Guide o Creating Ad Hoc packages o Data grid quick guide o Launchpad Quick guide
<p>Admin and Activity log</p> <p>Admin</p> <ul style="list-style-type: none"> • Setting up User records • Linking Networks <p>Activity log</p> <ul style="list-style-type: none"> • Understanding visualization view • Filtering and searching • Activity log details 	In-person (1.5 hours)	Administrators	



Learning Plan for Radia

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Classes are listed in the order in which they should be taken. Note that this is the recommended learning plan. Custom learning plans can be developed upon request.

Recommended Learning Plans	Role	Live Webinars
<p>Radia Campaign Management (1)</p> <ul style="list-style-type: none"> • Introduction • Create a Campaign • Work in Sell side management in the Sell View • Work in Buy side management – Payable Allocation in the Buy View • Push Financials to accounting system • Manage, Send IOs – Direct Buy vs. DSP • Push DSP details to integrated DSP Suppliers 	Account Manager	2.5 hours
<p>Radia Campaign Management (2)</p> <ul style="list-style-type: none"> • Review of class 1 • Manage delivery data in the Analyze View • Actualize Placements – Buy View/Actualize • Optimization – Buy View/Flighting • Update Financials, Orders (IOs), and Traffic details to integrated DSPs • Invoice Reconciliation • Reporting Dashboard 	Account Manager	2.5 hours