



Learning Plan - Lumina Plan Management

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Note that this is the recommended learning plan. Custom learning plans can be developed upon request.

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	
Lumina In-Person <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) *If selected, this option takes the place of the intro and plan entry sessions.	Media planner/Buyer	<ul style="list-style-type: none"> - Create a New Plan - Working with Flights - Reporting 	<ul style="list-style-type: none"> - Working with Plans - Flighting - Customizing the Flowchart
Lumina Plan Entry <ul style="list-style-type: none"> Creating a new plan Creating flights Flight workflow 	Hands-on-Learning Lab (1.5 hours) *Monthly Hands-on-Learning webinar offered	Media Planner/Buyer	<ul style="list-style-type: none"> - Create a New Plan - Working with Flights 	<ul style="list-style-type: none"> - Working with Plans - Flighting
Lumina for Advertisers <ul style="list-style-type: none"> What is plan management? Home Page and navigation Viewing media plans Approval and Authorizations Build and save reports 	Webinar (1 hour)	Advertiser	<ul style="list-style-type: none"> - Plan Management Overview 	<ul style="list-style-type: none"> - Approvals & Authorizations - Customizing the flowchart - Reporting
Actualization (non-Prisma) <ul style="list-style-type: none"> Splitting Flights Actualization in Lumina Actualizing via excel import Customizing Views Reporting 	Simulated Webinar (45 minutes)	Media Planner/Buyer		<ul style="list-style-type: none"> - Flighting

Customizations <ul style="list-style-type: none"> • Summary Dashboard • Flowchart • Export options • Personal and Shared Views • History and comments 	Simulated Webinar (35 minutes)	Any		- Customizing The Flowchart
Export and Import <ul style="list-style-type: none"> • Exporting template • Working with the template • Importing • Amend using template 	Simulated Webinar (45 mins)	Media Planner/Buyer	- Vendor Details - Exporting and preparing the Excel template, importing and mapping fields and saving	Vendor Details - Exporting and preparing the Excel template, importing and mapping fields and saving
Approvals <ul style="list-style-type: none"> • Approval overview • Sending for approval • Requesting changes • Approving a plan • Viewing plan approval history 	Simulated Webinar (15 minutes)	Any	-	- Approvals & Authorizations
Authorizations <ul style="list-style-type: none"> • Authorization overview • Sequence • Status • History 	Simulated Webinar (25 minutes)	Any	-	- Approvals & Authorizations
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 ▪ Knowledge check 	In-person/ Webinar (1 -1.5 hours)	Global/Limited Administrator	Lumina Admin module overview video	- Currency Exchange - Security - Working with the business hierarchy - New User Registration
Lumina Tips and Tricks <ul style="list-style-type: none"> • Home screen groupings • Flighting tips • Viewing tricks • Reporting filters • Fact sheet and plan ID 	Simulated webinar (30 mins)	Media Planner/Buyer	- Filter and Grouping	- Tips and Tricks