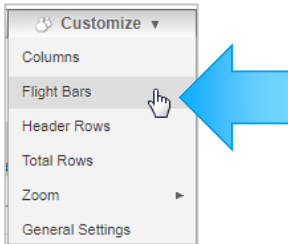# Lumina Plan Management – Allocations - In line editing

Mediaocean Client Services
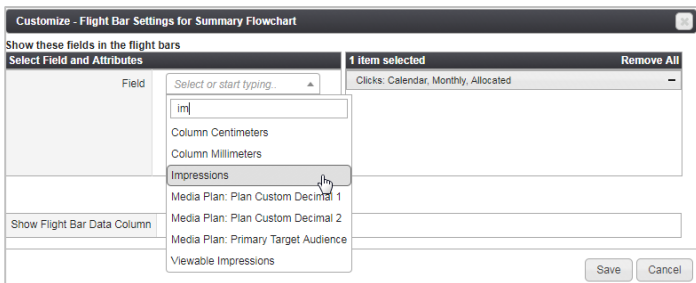Lumina@mediaocean.com
www.mediaocean.com

Overview

The allocation tool allows users to allocate cost expenses or KPI values across a particular time period. Users can use this tool for any field that has [icon] to the right of the field.

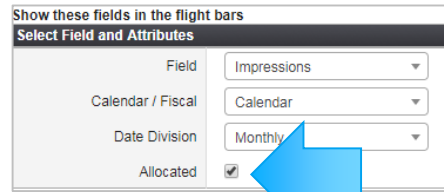## 1. Adding allocations to flight bars

1. In the **Edit Mode** of your Flowchart, click **View vendor details.**

2. Choose **Flight Bars** from the **Customize** drop-down menu.

3. Choose a value, e.g., Impressions from the Field drop-down menu.

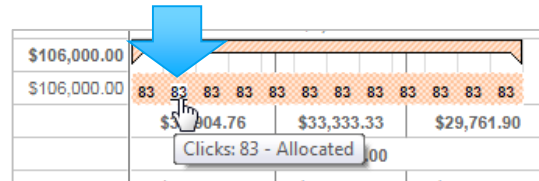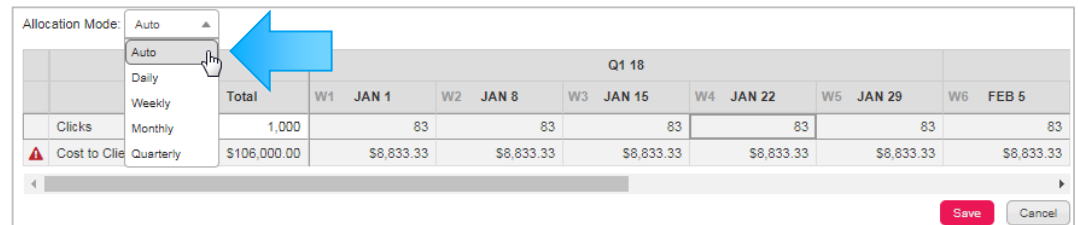4. Check the box next to the **Allocated** checkbox.

5. Click [Add] .

2. Using the in-line allocation editor

You can edit the allocations for a single field via the following steps.

1. Click any of the impression numbers for a vendor detail to open the in-line allocation editor.

2. In order to make a change, select one of the following allocation modes from the drop-down.

- **Auto**: Automatically allocates field values. Choosing this option disables your ability to allocate as Lumina does it for you automatically. (Defaults to an even weekly split)

- **Daily**: Allocate by day.

- **Weekly**: Allocate by week.

- **Monthly**: Allocate by month.

- **Quarterly**: Allocate by quarter.

3. The single fields are now editable. Click into a field and make necessary changes.

Lumina Plan Management – Allocations - In line editing

Depending on the entered values, the **Total** field will be highlighted in **red**, giving the following options to choose from.

- distribute allocations evenly or
- distribute weighted
- Apply to total
- Revert Change

Keep in mind that the allocations must add up to the field's total. If the allocations exceed or don't add up to the total the **Tota**l cell will be highlighted in **red**.

✱ *If you choose any option, other than Auto, you can cut, copy, and paste cells. You can click and drag an amount to other cells to fill those cells with the same amount. You can also copy and paste cells from Microsoft Excel into the grid.*