



Customizing the Flowchart

Using the flowchart menu, you can change what information is displayed and how the information is grouped.

1. Columns

1. Hover over Customize T on top of the Plan Summary navigation bar and Select Columns, Flight Bars, or Total Rows.

Plan Summary (1 Vendor Details)				
You are currently	/ in read mode.	Switch to Edit Mode		
🔍 New 🔻	🚽 🔬 Import 🔻	⊥ Export ▼	💍 Customize 🔻 🕞	् Views 🔻

👌 Customize 🔻
Columns
Flight Bars
Header Rows
Total Rows
Zoom 🕨
General Settings
Chart Settings
Flight Colors
Filtering

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- 2. In the Display these columns section, in the Select Field and Attributes box, select a Field.
- 3. As an example, choose **Columns** from the drop-down menu.
- 4. Search and choose **Cost to Client** from the **Field** drop-down menu.

Customize - Select Columns	\$		
Display these columns Select Field and Attributes		3 items selected	Remove All
Field	Cost to Client	Media Type	-
		Vendor Detail: Daypart	-
Workflow Step	Current	Creative Unit (Budgeted Creative Unit)	-
Decimal Places	2		
Currency	Default Currency - Test 🔻		
Percent of Total			
	Add		
Group by			
Select Field and Attributes		1 item selected	Remove All
Field	Select or start typing	Media Type	-
	Add		
Show Summary Bars	 Image: A start of the start of		
Collapse All Groups by Default			
			Save Cancel



Choose a workflow step to display the field value in that workflow step. For example choose **Budgeted** from the drop-down menu, and click Add.

isplay these columns		
elect Field and Attributes		
Field	Cost to Client	•
Workflow Step	Current	
Decimal Places		
Currency	Current	
Percent of Total	Budgeted	
	Planned	-
b	Booked	d
roup by Select Field and Attributes	Actual	

Group by	
Select Field and Attributes	2 ii
Field	Select or start typing
	⊢lignt: Global (Country) - Region Flight: Global (Country) - Sub-Region
	Flight: Global (Country) - Country
	Flight: Media Market
	Flight: Media Sub-Type
Show Summary Bars	Format
Collapse All Groups by Default	Format Type
	Illuminated
	Issue Name

8. Click Save.

With all the Customize menu items you have the ability to search for an item to speed up finding the item you are looking for. Just type in text for an item and existing matches will be displayed. If the same field, with the same attributes exists already, you'll be asked to either remove the field or change the customization settings.

2. Flight Bars and Total Rows

Once you choose **Flight Bars** or **Total Rows** from the **Customize** drop-down menu, you can follow the same steps above, to add the fields.

Depending on the settings available for these fields, you can customize the following.

- Fiscal/Calendar Select whether to follow the standard calendar or the fiscal calendar.
- Date Division Whether to display totals as weekly, monthly, quarterly, or more.
- Decimal Places Number of decimal places to display.
- Currency Currency to display.
- Percent of total Displays the total percentage for column and total row fields.
- * Fiscal/Calendar and Date Division customization can only be done for columns and total rows.

6. The added field will be displayed in the [X] items selected column on the right. So you can choose to display costs and KPIs at different workflow steps, on the flowchart. For example, you can display Gross cost in the Planned step and Gross cost in the Actual step. This enables you to more easily view the difference in costs or KPIs across multiple workflow steps.

4 items selected	Remove All
Media Type	-
Vendor Detail: Daypart	-
Gross Cost: (Planned), Default Currency - Test Series 2	-
Gross Cost: (Actual), Default Currency - Test Series 2	-

7. The **Group by** section, will group your Flowchart by a chosen field. For example, search for **Flight: Media Sub-Type**, in the **Field** drop-

down, and click Add



w these fields in the flight	hars	
ect Field and Attributes		2 items selected Remove
Field	Budgeted Cost to Client	Net Cost
Decimal Places	2	Budgeted Cost to Client
Currency	Default Currency - Test 🔻	
Allocated		
	Add	
ow Flight Bar Data Column		
		Save
		Save
al Rows		
al Rows lect Field and Attributes	Cost to Client	Save Can Save Nate Can Save Remove A Net Cost: Calendar, Monthly
al Rows lect Field and Attributes Field	Cost to Client	3 items selected Remove /
al Rows lect Field and Attributes Field Calendar / Fiscal	Calendar v	3 items selected Remove / Net Cost: Calendar, Monthly
al Rows lect Field and Attributes Field		3 items selected Remove / Net Cost: Calendar, Monthly Net Cost: Calendar, Quarterly
al Rows lect Field and Attributes Field Calendar / Fiscal	Calendar v	3 items selected Remove / Net Cost: Calendar, Monthly Net Cost: Calendar, Quarterly
al Rows lect Field and Attributes Field Calendar / Fiscal Date Division	Calendar Monthly	3 items selected Remove / Net Cost: Calendar, Monthly Net Cost: Calendar, Quarterly
Calendar / Fiscal Date Division Decimal Places	Calendar Monthly	3 items selected Remove / Net Cost: Calendar, Monthly Net Cost: Calendar, Quarterly
al Rows lect Field and Attributes Field Calendar / Fiscal Date Division Decimal Places Currency	Calendar Calendar Monthly Default Currency - Test	3 Items selected Remove / Net Cost: Calendar, Monthly Net Cost: Calendar, Quarterly Cost to Client: Calendar, Monthly, Percent of Total

3. Zoom

You can change how far out you want to view data. Select a zoom level from the choices available in the list.

	🖧 Customize 🔻	୍ Views 🔻	🎤 Plan I
	Columns		
	Flight Bars		
ł	Header Rows		
16	Total Rows	Cost to Client	Impressions
H	Zoom 🕨	2 Year	
	General Settings	Year	
H	Chart Settings	▶ Semi-Year	վեր
	Flight Colors	Quarter	
	Filtering	Month	-
		Week	

4. General Settings

You can change how far out you want to view data. Select the options you would like to apply to the plan.

lowchart Scrolling	No scrolling	•	
Event Calendar	Show Event Calendar	•	
Calendar Type	Plan Default (Gregorian)	•	
Week Start	Monday	•	

• Flowchart scrolling

> No scrolling - The columns and flowchart scroll as one item. As you scroll left the Columns will not be there.

Use Scroll bars - There are scroll bars under the flight data and only this information will scroll. The Column information remains in view all the time.

• Event Calendar

Show/Hide Event Calendar - The event calendar will be shown/hidden.

- Calendar Type (defaults to Georgian)
- Gregorian
- Broadcast
- Broadcast last week
- Broadcast most weeks

• Week Start - Choose from Sunday through Saturday Once finished, click Save.

5. Chart Settings

Select Chart settings from the Customize menu.

<u>Data tab</u>

Pie Chart and Table Chart - Customize your pie chart settings choosing from the following.

- Field Select a field to display with the chart.
- Fact Select a fact level to use for the chart.
- **Display** Select **Long Name** or **Short Name** to display the field's short name (if this is available for that field).

•	Click	<u> </u>

lick Add Fact to add additional Fact, in the Table Chart. (Screen shot)

Customize - Chart Settings	
Data Colors	
Pie Chart	
Field	Media Type 👻
Fact	Net Cost 👻
Display	Long Name Short Name (If Available)
Table Chart	
Field	Status 👻
Fact	Net Cost 🔹
Fact	Select a Fact
Fact	Select a Fact Remove
	Add Fact
Display	Long Name Short Name (If Available)

Colors tab

- Color By Select a field to determine how the chart is colored (e.g., Media Type).
- Value Select a color for each of the available values, for the selected field.
- ***** Click **Auto-select Colors** to set colors based off the applications defaults.

Customize - Chart Settings		
Data Colors		
Color By	Media Type 🔹	
	Auto-select Colors	
Value	Color	
Television		
Digital		
Print		
Radio		
оон		
Cinema		
Other		

6. Flight Colors

Customize the charts colors.

- Color By: Select a field to determine how the flight is colored (e.g., Media Type).
- Value For each of the available values, for the selected field, set a color.

7. Filtering

Select a field for which you'd like to filter from the **Filter by** drop-down menu. (e.g., selecting Digital if you choose to filter by Media Type).

The plan will be filtered to only show flights that have the value you selected.

Customize - Filtering					
Filter by	- Select Option -				
	Media Plan: Plan Custom Dropdown 3 Media Plan: Product - Product				
	Media Plan: Secondary Target Audience				
	Media Plan: Year				
	Media Type				
	Position				





You also have the ability to customize the subtotals and flight bars just for one group by right clicking on the **Media Type** in the Flowchart.

	斗 New 🔻	🚽 🕹 Import 🔻	🕮 Expo	ort v	് ് Cu	stomize v	R	
	Viewing 40 of 4	40 vendor details						
#	Vehicle (Statio	n, Title, Website)	Daypart	Gross C	ost	Net Cost	: 1 · 2	
1	Global							
1	= 2017_Sport	s Drink_United Sta		\$6,6	33,813.51	1 \$5,018,699.8	17	2
2	Televi			ê0 (4 3 ,757.45	\$4,735,943.83		2
3	CNN	 Move Up Move Down 			,130.00	\$8,610.50	0	
			Flight Bar Data For This Row SubTotals For This Group					
4	CNN	 Clear custom 	group preference	s	,882.35	\$4,000,000.00		
5	EI		Early Morning		235,000.00	\$199,750.00	-	

8. Saving a new View

Once you have customized the look of your flowchart, you can add a new view.

1. Hover over **Views** , and choose **Save Current View** from the drop-down menu.

8	Customize 🔻	् Views 🔻	
		Save Current Vie	» ՌՈ
		Default View	Ч
		Personal Views	×
e Unit	Gross Cost	Shared Views	F

Enter a name in the **View Name** field for your view, and choose **Personal View**.

2. Click **Save**, now you can find it in the **Views** drop-down menu under your **Personal Views**.

Save the current View				×				
View Name: *	My Work Space	् Views v		🖊 Plan Utili	ties v	C	H	isto
Security: *	 Personal View (Only I can see this view) Shared View - All (Everyone can see this 	Save Current Vie	w					
		Default View			January	Q1 Februar		
		Personal Views	•	My Digital view	:	x	6	7
		Shared Views	F	My Work Space	dho	×	5	12