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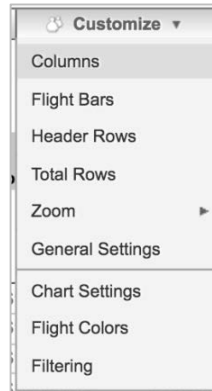
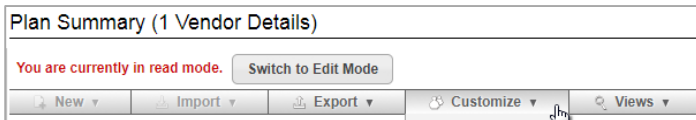
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Customizing the Flowchart

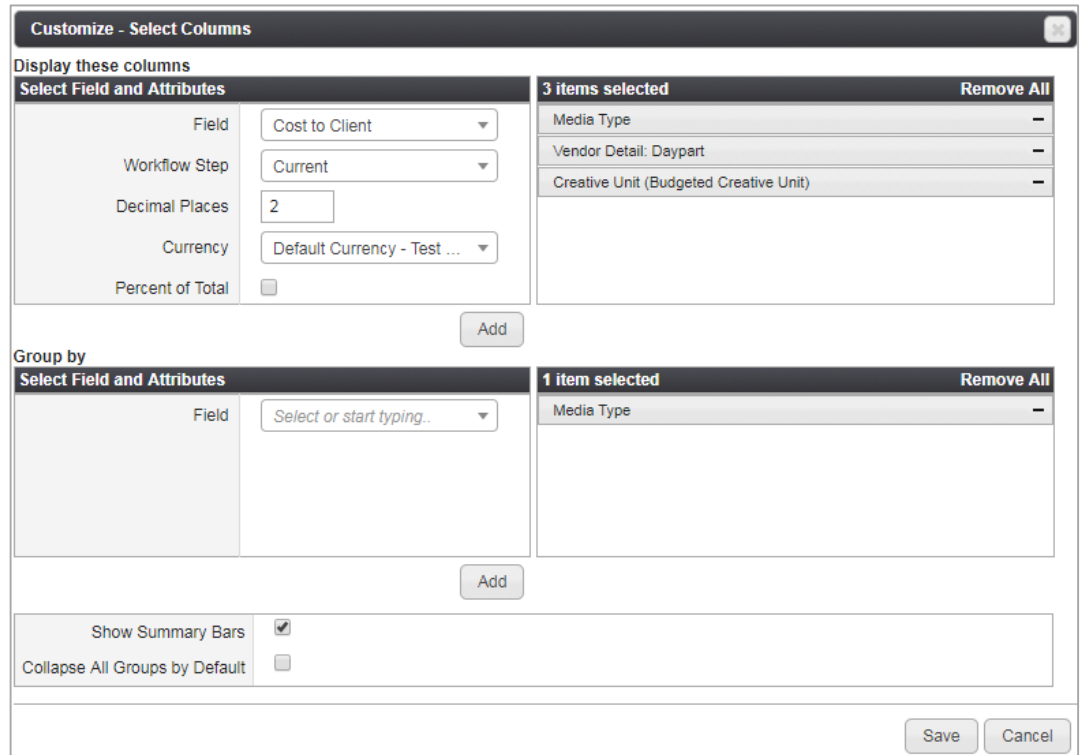
Using the flowchart menu, you can change what information is displayed and how the information is grouped.

1. Columns

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

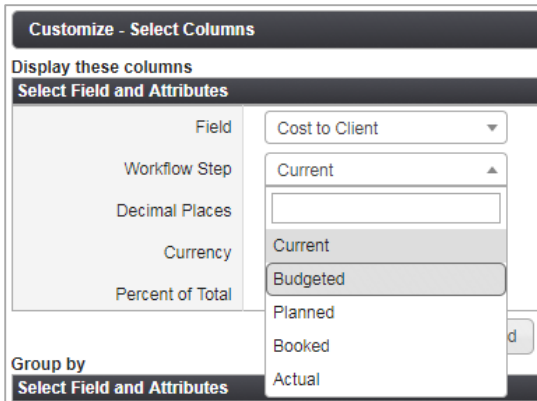


2. In the **Display these columns** section, in the **Select Field and Attributes** box, select a **Field**.
3. As an example, choose **Columns** from the drop-down menu.
4. Search and choose **Cost to Client** from the **Field** drop-down menu.



Lumina Plan Management – Customizing the Flowchart

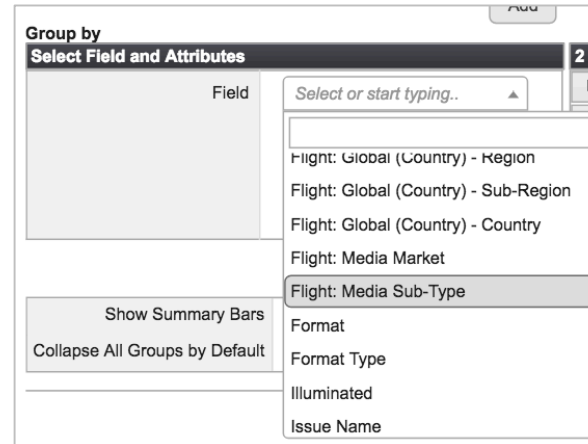
- Choose a workflow step to display the field value in that workflow step. For example choose **Budgeted** from the drop-down menu, and click **Add**.



- 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	—

- 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**.



- 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.*

Lumina Plan Management – Customizing the Flowchart



Customize - Flight Bar Settings for Summary Flowchart

Show these fields in the flight bars

Select Field and Attributes		2 items selected	Remove All
Field	Budgeted Cost to Client	Net Cost	-
Decimal Places	2	Budgeted Cost to Client	-
Currency	Default Currency - Test ...		
Allocated	<input type="checkbox"/>		

Add

Show Flight Bar Data Column

Save Cancel

Customize - Total Rows

Total Rows

Select Field and Attributes		3 items selected	Remove All
Field	Cost to Client	Net Cost: Calendar, Monthly	-
Calendar / Fiscal	Calendar	Net Cost: Calendar, Quarterly	-
Date Division	Monthly	Cost to Client: Calendar, Monthly, Percent of Total	-
Decimal Places	2		
Currency	Default Currency - Test ...		
Percent of Total	<input checked="" type="checkbox"/>		

Add

Save Cancel

3. Zoom

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

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.

Customize - General Settings

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

Save Cancel

- 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

Lumina Plan Management – Customizing the Flowchart



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

5. Chart Settings

Select **Chart settings** from the **Customize** menu.

Data tab

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

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.

Value	Color
Television	Red
Digital	Orange
Print	Yellow
Radio	Light Green
OOH	Green
Cinema	Teal
Other	Blue

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.

Lumina Plan Management – Customizing the Flowchart



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.

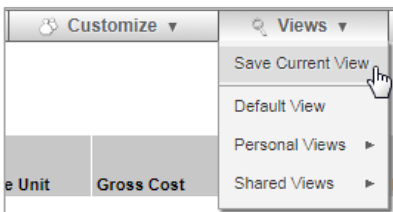
#	Vehicle (Station, Title, Website)	Daypart	Gross Cost	Net Cost
1	Global			
1	2017_Sports Drink_United Sta		\$6,633,813.51	\$5,018,699.89
2	Telev		\$6,343,757.45	\$4,735,943.83
3	CNN		130.00	\$8,610.50
4	CNN		882.35	\$4,000,000.00
5	EI	Early Morning	\$235,000.00	\$199,750.00

The context menu is open over the 'Telev' row, showing options: Move Up, Move Down, Customize Flight Bar Data For This Row, Customize SubTotals For This Group, and Clear custom group preferences.

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.



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**.

