

Lumina Plan Management – Working With Plans

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Overview

The **Plans** module allows you to view and work on applicable media plans. Security setup will dictate the specific plans you have access to, as well as your ability to edit plans.

1. Existing Plans

1. Hover over the **PLANS** drop-down on the top menu bar.
2. Select **Existing Plans** to display all plans.
3. Click on any plan name to open a plan.

* On this screen, you can only view plans within your **Geography** and **Business** setup.

Plan Name	Plan Start Date	Business	Product	Geography
2019_Lemon Lime Soda_Asia_Regional Original part 5 - v3	Oct 01 2018	ACME Products	Lemon Lime Soda	Asia
2018_Healthy Living_United States_Global Bert's Demo Plan - v3	Jan 01 2018	ACME Products	Healthy Living	United States
2019_Sports Drink_United States_XQ - v4	Jan 01 2019	ACME Products	Sports Drink	United States

Filter plans and locate specific details using the following shortcuts:

- The **Search Media Plans** menu at the top of the page.
- The **->Go** search option (copying a plan, flight or vendor ID number).
- The **Authorizations** tab, linking you to all **Pending** authorizations (applicable to approvers).
- Type a keyword into a column header.
- Utilize the filter icon

Plan Name
soda
2019_Lemon Lime Soda_Asia_Regional Original part 5 - v3

4. To create a **Plan Group**, use the check boxes to select the plans you'd like to see consolidated.

5. Click **View Selected** at the bottom of the page to create the grouping.

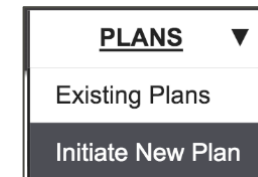
<input checked="" type="checkbox"/>	2019_ACME Products_NA_CO-OP AGENCY Mary's test #1 - v1	Jul 15 2019
<input checked="" type="checkbox"/>	2019_Health_North America_ - v1	Sep 30 2019
<input checked="" type="checkbox"/>	2019_Cola_APAC_Regional - v1	Jan 01 2019

Showing 1 to 25 of 26 entries (filtered from 1,638 total entries) Show 25 entries

Once saved, this will show in the **Groups** tab.

2. Initiate New Plan

1. to create a new plan, click **Initiate New Plan** from the **PLANS** drop-down menu.



2. Fill in the required fields. (see appendix 1)

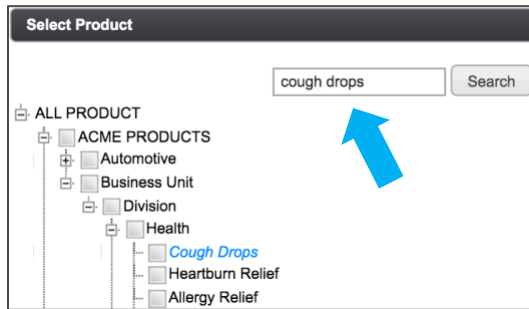
* *The number of required fields (red asterisk) and specific field labeling may differ depending on your site setup.*

- **Agency:** The Agency the plan is associated with.
- **Advertiser:** The Advertiser the plan is associated with.
- **Buying Agency:** The Buying Agency the plan is associated with.

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- **Geography/Currency:** The geography level for your plan and associated currency. These fields may default based on security setup.
- **Product:** The line of business for your plan.

* You can locate field values by selecting from the drop-down menu or typing to search.



- **Media Market:** Indicate whether this is a national or local plan.
- **Local Market:** If local, select your specified market(s).
- **Year:** Indicates the plan's year.
- **Plan Start/End Date:** The date range of the plan.
- **Custom Plan Identifier:** Optional text which will display at the end of the **Plan Name**.
- **Plan Name:** The name of your plan. This will auto-populate as **Initiate New Plan** details are added.
- **Plan Budget (Cost to Client):** Overall cost to client plan budget.
- **Primary Target Audience:** Target group demographic for your plan.

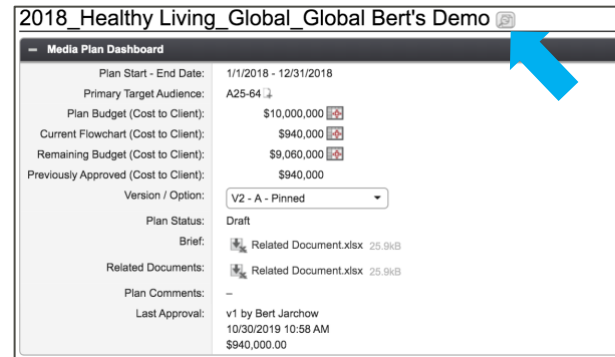
* Optionally upload or copy/paste **Media Brief** information via the buttons below.

Brief:	Upload a file	Paste
Related Documents:	Upload a file	Paste

3. Click to create your plan.

3. Plan Dashboard

Once initiated, the **Media Plan Dashboard** will display the overall plan details.

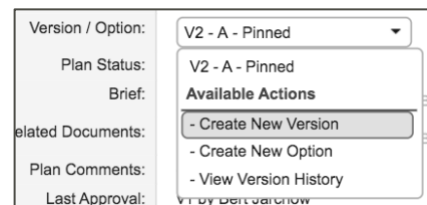


Editing Plan Details

1. Click the edit icon to display the **Plan Details**.
2. Click **Edit** and enter any new/updated values.
3. Click **Save**.

Versions and Options

The **Version/Option** drop-down menu allows you to manage your version/option preferences. You can create, view history or choose to **pin** versions (make default and reportable).

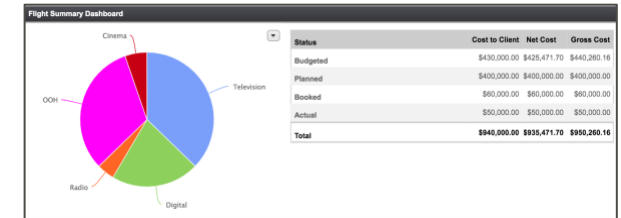


	Version	Created By
<input type="checkbox"/>	- All -	- All -
<input checked="" type="checkbox"/>	V2 - A - Pinned	Bert Jarchow

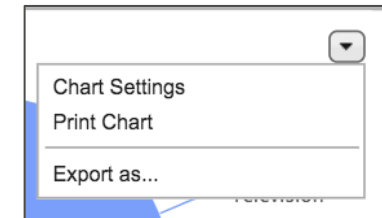
* **Pinned plans** indicate the default version that will display when the plan is opened. Only **Pinned** plan data will show in reporting.

Flight Summary Dashboard Chart

Displays your media mix with a pie chart and table:

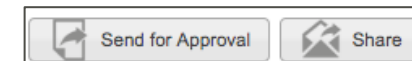


4. To edit or export your chart/table, click the dropdown icon.



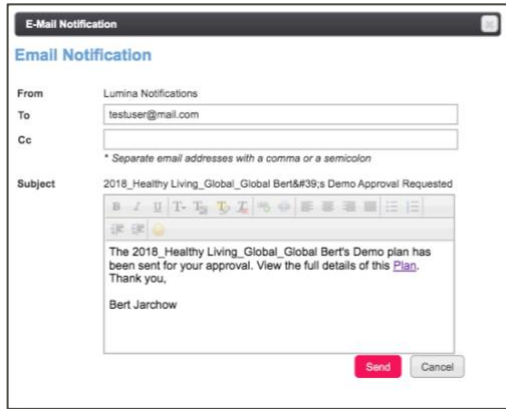
4. Plan Approvals

When a plan is ready to be sent for approval (internal or external) navigate to the workflow buttons above the dashboard.



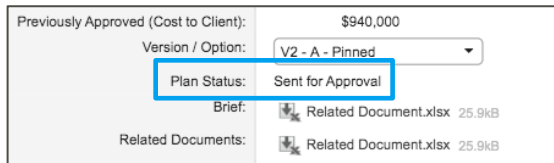
- **Share** - Enables you to send a link of the plan to any user with access (not associated with approval workflow).
- **Send for Approval** - Will prompt an email notification for the approver (e.g., on the following image).

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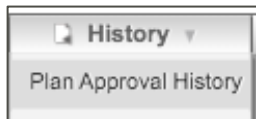
1. Enter the name of the approver in the **To** field.
2. If applicable, customize the message in the body of the email by clicking into the text box.
3. Click **Send** to send for Approval.

Upon sending, the **Plan Status** will transition to **Sent for Approval**.



* When a plan is **Sent for Approval**, **Approved** or **Changes Requested**, Lumina will notify you via email.

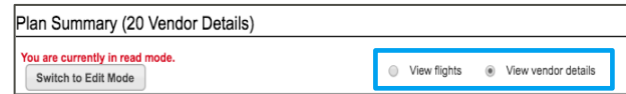
To view an audit trail of the approval workflow history. Use the **History** drop-down menu above the flowchart.



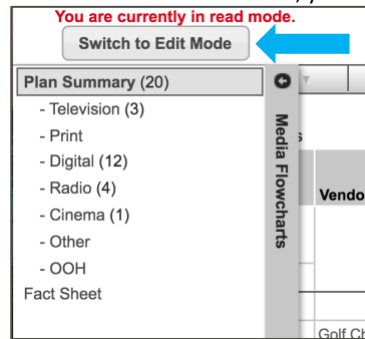
4. Plan Summary

The **Plan Summary** is where your flowchart is displayed. You can create flights and view spend across different media channels in this section.

1. Click to switch between **View flights** and **View vendor details**.



2. In order to edit the flowchart, you must be in **Edit Mode**



3. Click on the left navigation bar to display the **Media Flowcharts** menu.

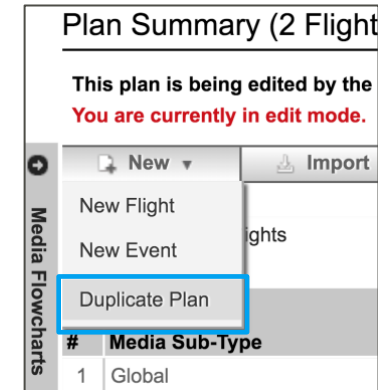
Selecting one of these options will filter the flowchart to only that **Media Type**.

4. Search for Plan, Flight or Vendor **ID**, using the **->Go** search box above the flowchart.



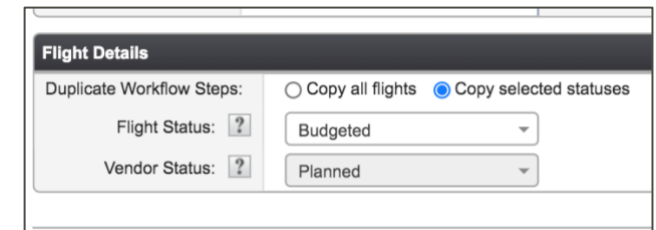
Duplicate Plan

To create a plan that is a duplicate of what you are currently working on, navigate to **Duplicate Plan** in the **New** drop-down menu



Once selected, Lumina allows you to adjust the **Plan Details** accordingly if necessary.

You can also specify what **Flight Details** should be copied over:



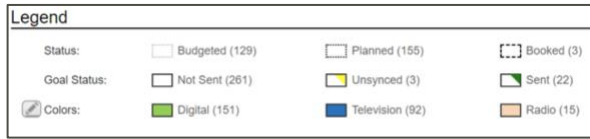
Once saved, the new plan will show at the top on your **Existing Plans** page. It will be flagged as 'duplicate' in the **Plan Comments**.

* See the **Lumina Flighting Quickcard** for more information on working with flights and flowchart capabilities.

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5. Legend and Comments

The Legend section at the bottom of the screen allows you to filter the flowchart and view the colors/borders associated with your flights/vendors.



By default, Lumina will display the border for each **Flight Status**, as well as display the flight colors by media type.

Filter by Legend

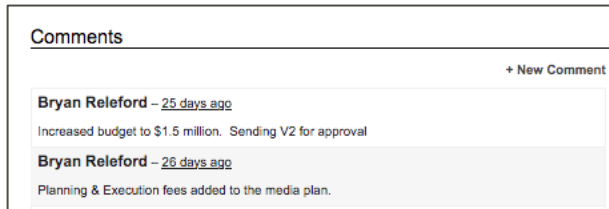
1. Click on a status, e.g., **Planned** from the **Status** filter to only show **Planned** flight data.
2. Click **Clear Filters** to clear.

Filters can be edited in the **Customize** drop-down menu above the flowchart. You can also edit by clicking the edit option



Comments

Comments can be viewed and added to plans in the **Comments** section at the bottom of the plan page.



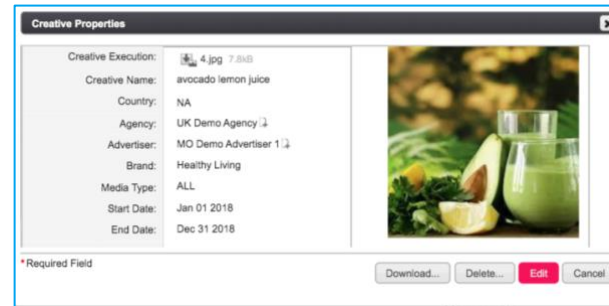
6. Creatives

Creative assets that have been added to flights will be summarized in the **Creatives** section below the flowchart.

This will display all creatives associated with your plan.



1. Click on an existing Creative.



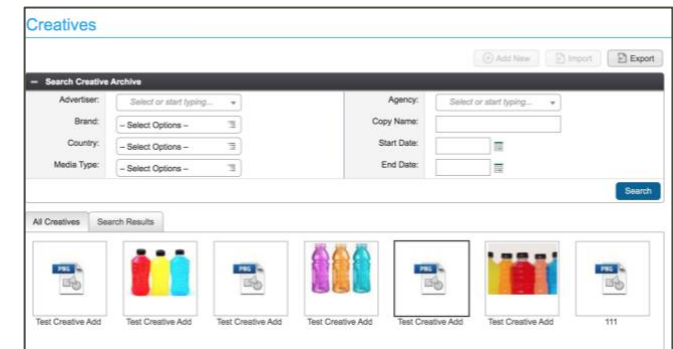
2. You can choose any of the following options:
 - **Download:** Download the image.
 - **Delete:** Delete the creative.
 - **Edit:** Make any changes to the existing data and upload a new creative.
3. Click **Save**.

Creative Archive

You can also view applicable creatives in the **CREATIVES** module. This is accessible from the top navigation menu.



This will display your full creative library, containing all assets that have been uploaded to various plans.



New creatives can be added/edited within the archive or directly on flights/vendors.

7. Appendix 1 – Initiating a new plan (Sample)

Initiate New Plan

Plan Organizations

Agency: *	Mediaocean x ▾	Advertiser: *	Advertiser x ▾
Buying Agency: *	Mediaocean		

Plan Details

Geography: *	United States	Plan Name:	2020_Cough Drops_United States_Regional Test Plan
Media Market: *	National	Currency: *	USD
Product: *	Cough Drops	Plan Budget (Cost to Client): *	10,000,000.00 \$
Funding Source:	Regional x ▾	Primary Target Audience: *	A18-34 x ▾
Budget Owner: *	Corporate ▾	Secondary Target Audience:	– Select Options – ▾
Year: *	2020 x ▾	Overall Campaign Objective:	
Plan Start Date: *	Jan 01 2020	Brief:	Upload a file Paste
Plan End Date: *	Dec 31 2020	Related Documents:	Upload a file Paste
Custom Plan Identifier:	Test Plan	Plan Comments:	

Initiate **Cancel**