Spot Buy Toolkit – Prebuy

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

1. Overview

Spot Buy Toolkit is an application which allows you to create schedules, manage buys, place orders, and create revisions.

2. Open Buy Folder

1. On the Welcome dialog, select **Open Buy Folder**.

2. On the **Other** tab on the Open Buy Folder dialog, complete the **Media**, **Client**, **Product**, **Estimate** and **Market** or **Station** fields and click **OK**.

3. New Worksheet Wizard

1. When the new Worksheet Wizard appears, complete **Name**, **Buyer**, **Period**, and **Projection/Book**.

    - To enter a projection or book, select **Browse Projections** or **Browse Books** from the drop-down list.

    - To manually enter a Share/PUT projection, use the following format: `UPT=PUT/NOV06,BK=JUL07`.

✱ *Depending on your Nielsen or comScore subscriptions and where in Spot Buy Toolkit you are working, you can select from monthly and overnight books.*

    - If comScore data is available, you can enter `B` in **comScore Survey** to base survey dates on the Broadcast calendar. The default `S` is set to Standard Sweeps dates.

    - In **comScore Book Type**, select the comScore viewing stream for demographic lookup. This is required if there are comScore demos on the estimate and defaults to the option on the Estimate, Master or Market record.

2. Click **Next** to enter historical books and demographic options for researching schedule options OR select **Finish** to complete the worksheet setup.

Historical books for research

1. To enter historical books and demographic options, complete the **Additional (demographic categories)** and **Auto-adjust category**.

2. Once finished, click **Next** to enter line-level codes and notes OR select **Finish** to complete the worksheet setup.

Line-level codes and notes

1. To include Line-level codes and notes, complete **Adjacency code**, **Product**, **Rep code**, **Purpose code** and/or **Notes**.

2. Click **Finish** to complete the worksheet setup.

4. Manually Add Avails

1. Click on the toolbar to manually add a new avail.

2. On the Add Avail Line dialog, complete the **Station**, **Days**, **Times**, **Daypart** and **Spot Length** details.

3. In **Program**, enter the program name or leave the default `[LOOKUP]` and the system will retrieve the program name from the share book in your projection.

4. Specify the rate structure for this period and enter the corresponding rate(s) in the **Rate** column.

5. In **Demos**, verify the selected book or projection. If necessary, select a new book or projection from the **Book/projection** drop-down list.
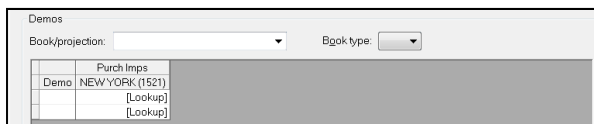
✱ *If necessary, manually override the values in the* ***Purch Rtg/Imps*** *column.*

6. Click **OK**.

5. Copy Avails Across Folders

Select and copy the avails

1. Open the worksheet for the source client, or the client from which you want to copy avails.

2. Highlight avails by clicking and dragging along the gray bar on the left.

3. You can also select multiple avails using the **Ctrl** key or click **Select All** on the **Edit** menu dropdown to select all avails on the open worksheet.

4. On the **Edit** menu, click **Copy**.

Create a New Worksheet
If you want to copy the avails into a new worksheet, you must first set up the new worksheet.

1. Click ⬜ on the toolbar to open a new buy folder. Enter the **Client**, **Product**, and **Estimate** to open a buy folder for the target client.

2. In the New Worksheet dialog, enter a projection formula in **Projection/Book.**

3. Click **Finish**. A new, blank worksheet is displayed.

Paste the avails into the worksheet
1. On the **Edit** menu, click **Paste Special** to paste the lines you copied from the previous worksheet.

2. The Paste Special dialog appears. Select **Rates**, **Spots**, **Demos**, and/or **Comments** under **Select details to include** section to include in the worksheet.
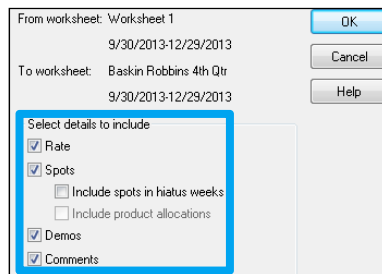

3. Click **OK** and select **Save** to save your work.

6. Transfer the Schedule to the Buysheet

1. On the Worksheet menu, click **Transfer**. You can also right-click the gray bar and select **Transfer.**

2. When the worksheet is successfully transferred, ⬜ appears in the **Status** column for all transferred lines.

3. Click the **Buy Management** link on the slidebar.

✱ *Only displayed lines with scheduled spots are transferred to the Buysheet. If a filter is active on the worksheet, lines that are not visible are not transferred.*

7. Working with Proposals

1. To attach a proposal, click the **Proposals** link on the slidebar of your Buysheet. Click **Yes** in the dialogue box.
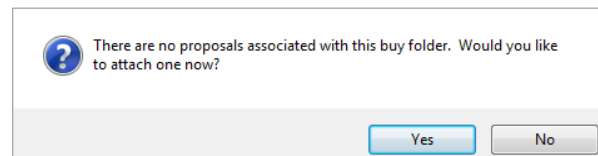
✱ *Seller proposal files cannot be imported directly from an email. Files must be saved locally before import.*

2. In the file viewer, find your proposal file to import and click **OK**.

- To view all proposal files, including those you have previously imported, select **Include previously viewed proposals**.

- You can also import multiple proposals. On the **Proposal** menu, click **Attach Proposal** to attach additional proposals.
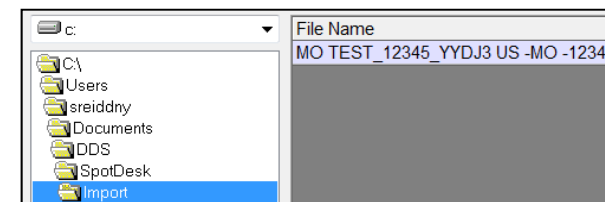

Copy and Paste Proposal Lines
Once a proposal is attached, copy the proposal lines and paste them into the worksheet.

1. To highlight multiple lines, click and drag your mouse across the gray bar on the left.

2. Right-click the highlighted lines and select **Copy**.

3. Click the **Worksheets** link on the slidebar to return to the worksheet. On the **Edit** menu, click **Paste Special.** When the Paste Special window appears, you can select to paste **Rates**, **Spots**, **Demos**, and/or **Comments** from the proposal by checking the boxes under **Select details to include** section.

✱ *If any detail was not included in the proposal file from which you copied the data, the corresponding check boxes are disabled on this dialog.*

4. In **Paste rates and spots by**, select how the spots and rates should paste into the worksheet.
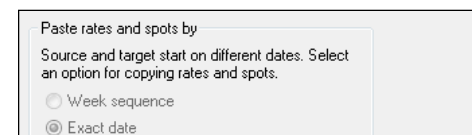
5. Click **OK** to add the selected lines to your worksheet.

✱ To save the worksheet, click 💾. This saves changes to the worksheet only. Changes in other parts of the buy folder must be saved separately.

Proposals: Special features

1. To include additional features, open the **Proposal** menu and click either **Proposal Sales Information** or **Program List Sales** to view additional sales information.

2. Proposals can also include additional features such as a **spot schedule**, **multiple lists of available programming**, and **additional sales information** at the proposal or program list level.

✱ *If a paper clip* 📎 *appears, this indicates read-only sales information.*

8. Research and Evaluation

Competition Analysis

The Competition Analysis compares demographic information for a single time period across stations in a market to see what is airing in a time slot. It displays cumulative shares, ratings, impressions, and putts for the selected demo category and time period for all specified stations.

1. Select **Competition Analysis** from the **Research** menu.

2. Highlight one or more lines on the list of avails/revlines in the upper portion of the window.

3. Complete the following details in the **Lookup Criteria** section:

Source	If you have access to comScore data, you can choose comScore in addition to Nielsen. You can also choose Multiple to view comScore and Nielsen together.
Books	Enter the book(s) against which you want to perform the competition analysis. You can include any combination of monthly books, overnight books, and book types.
Demo	(Optional) Select a different demo category from the drop-down list.

Station	Select stations with ratings you wish to view in relation to your filtered avail line(s).
Projecti on	(Optional) Override the avail line projection.

4. Click **Retrieve**. The demo data for competing stations appears in the grid in the lower portion of the window.

Trend Analysis

The Trend Analysis compares demographics across multiple books so you can see the audience your programs are reaching. You can select up to eight books, which appear in the order they've been selected.

1. Select **Trend Analysis** from the **Research** menu and click an avail line to select it.

2. Select your Source, Books (enter or select up to eight), and Lookup Criteria (if applicable)

3. Click **Retrieve**. Review the trend data displayed in the lower portion of the window. Scroll right to view additional data.

Rotation Analysis

The Rotation Analysis breaks out the actual rotation, or time period as well as the lead in and lead out programs and calculate break averages.

1. On the Research menu, click **Rotation Analysis**.

2. Click an avail line to select it.

3. Select your Source, Books (enter or select up to eight), and adjust analysis options (if applicable)

✱ *To select **All** and **Multiple** Sources, you must have access to more than one source.*

4. Click **Retrieve**. Review the Lead-in, Lead-out and Break Averages displayed in the lower portion of the window.

✱ *Press F9 to retrieve demos for the next avail line or Shift+F9 to retrieve demos for the previous line.*

Audience Composition

Displays viewership percentages in order to see the audience your program reaches.

1. On the Research menu, click **Audience Composition**.

2. Complete the **Lookup Criteria** section, as necessary.

Base Demo	Select the appropriate demo category or accept the default.
Demo	(Optional) Modify the demos, as necessary.
Override Book / Projection	(Optional) Enter or select a book or projection to override the book or projection on the avail line.

3. Click **Retrieve**.

4. Review the audience composition data displayed in the lower portion of the window.

Ranker

Shows the top programs across stations for a particular demo in a daypart. By default, the report lists the top ten stations, but you can specify however many stations you want or just selected stations.

1. On the Research menu, click **Ranker**.

2. Complete the **Source** details in the **Lookup Criteria** section and the optional **Books**, **Demos**, **Dayparts**, and **Stations** sections.

✱ *To select **All** and **Multiple** in Source, you must have access to more than one source.*

3. Click **Retrieve**. Review the ranker data displayed in the lower portion of the window. Scroll right to view additional data.

View chart

1. To display a visual depiction of the information contained in any research tool using the **Show Chart** option, open the research tool.

2. On the **View** menu, click **Show Chart**. A chart appears on the lower right side of the analysis screen.
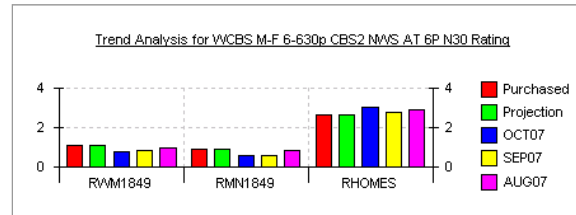
9. Schedule Spots

1. On the worksheet **Schedule** panel, select the cell corresponding to the week (or day) you want to schedule a spot.

2. Enter a number in the chosen cell, indicating the number of spots you want to run.

✱ *You can also use schedule shortcuts such as n+, nA, nT, or nf, where n=number of weeks.*

3. Press Enter.

✱ *The number you entered appears in **blue** until you save the worksheet.*

Work with Demographics

The Spot Buy Toolkit **Demos** pane displays projected demographic information for the selected avail line in the Schedule pane. Demographic values are calculated using the book or projection specified on the avail line.

For comScore, the system does not automatically retrieve demographic values.

1. To retrieve comScore demos, select the line(s).

2. Click the **Retrieve Demos** button on the Worksheet toolbar to look up comScore demographic values for any demo category that has a [Lookup] value.

✱ *You cannot transfer the avail line if the comScore demo value displayed is N/A.*

10. Adjust Rates

If you need to adjust your avails to handle different seconds lengths, you can do so by copying the affected avails and using the adjust rates feature.

1. In the worksheet, click and drag to highlight the avails you want to copy.

2. On the **Edit** menu, click **Copy** and then **Paste**. All of the newly copied and pasted lines are displayed in **green**.

3. To display only the newly copied and pasted lines, click the **View** menu then select **Avail Lines by Status > Unsaved Changes**. Select all of the new lines.

4. On the **Worksheet** menu, click **Adjust Rate**.

5. In **Adjust by**, enter the percentage by which you want to adjust the rates of the selected avails.

6. (Optional) In the **Other line changes** section, enter the new spot length or rep code.

7. Click **OK**. Adjusted rates appear in **blue**.

8. Click [save icon] to save your work.

9. After you have adjusted your rates and lengths, select **Avail Lines by Status > All** on the **View** menu to return to the standard view.

11. Mark Weeks as Unavailable

If you have specific weeks in which you cannot schedule spots for certain programs, you can prevent scheduling for this time period.

1. On the worksheet, select the avail line(s) you do not want to schedule spots.

2. Right-click the avail line and select **Avail Line Details**.

3. On the Avail Line Details dialog, select the **By week** option in the **Rates** section. The rates in the grid will be broken out by week.

---

4. Enter `N/A` in the rate cells for weeks that cannot be scheduled.

5. Click **OK** to close the Avail Line Details dialog. The weeks with **N/A** are now grayed out on the Schedule panel.

6. On the **Rates** panel, `N/A` is displayed in the **Rates** column for the weeks you specified.

✽ *To enable scheduling for a week marked as unavailable, type a numerical rate directly in the Rate column on the Rates panel for the specified week.*

12. Report Types

1. On the **Report** menu, select a report to run it.

2. A link for each report will be added under the current sheet link on the Spot Buy Toolkit slidebar.

Goals Flowchart
Displays goal points and dollars by daypart and length in a flowchart format.

Goals vs. Purchased Daypart
Compares goal dollars or points to purchase information by daypart.

Goals vs. Purchased Weekly
Compares goal dollars or points to purchase information by week.

Station Schedule
Shows detailed information about programming on each station as well as the proposed schedule of spots in a flow chart format.

Station Share
Shows the share of each station will receive of the total budget.

Purchased Demo Report
The Purchased Demo report includes the rates, demos and CPP/M for each line. It is available in worksheets, the Buysheet, and revisions.

Daypart Mix
Compares goal dollars to purchase information by daypart.

13. Working with Reports

Worksheet Recap Report
1. Select the checkboxes corresponding to the worksheets you want to view. Click **OK**.

2. The Worksheet Recap report displays data for all selected worksheets

Request Custom Reports

1. Select **New Report**.

2. The Columns window will appear. Choose the columns you want to include by selecting from the Available Columns list and clicking **Add**.
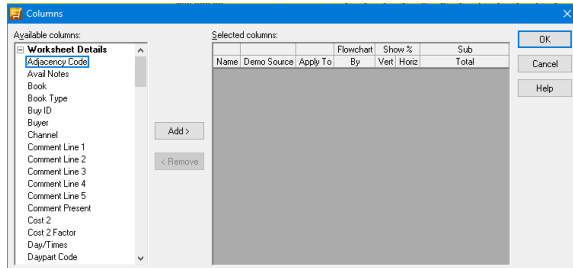
3. Select **OK** to generate the report.

Reporting Display and Print Options

1. Open an existing report. On the View menu, click **Display and Print Options**.

2. Within the **Rows** and **Totals** sections, you can select optional data to display on the report.
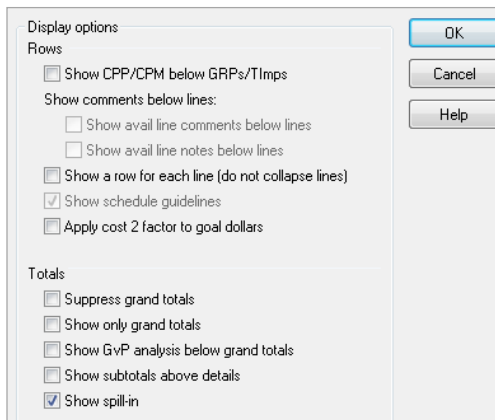
3. The **Line spacing** and **Page break column** drop-down lists allow you to select optional spacing and columns.

4. After you've made your selections, click **OK**.

14. Save Templates

Templates are available in all sheets, reports, and research tools. You have the option to save the layout of your report or sheet for future use.

Worksheet	On the **File** menu, click **Save Worksheet Template**.
Buysheet	On the **File** menu, click **Save Buysheet Template**.
Report Template	On the **Report** menu, click **Save Report Template**.
Research Template	On the **Report** menu, click **Save Research Template**.

✱ *To apply a template, click **Apply Worksheet Template** on the File menu.*

15. Anatomy of the Worksheet

5. **Slidebar**

   - The slidebar is a navigation panel that contains blue links to the four sections of the buy folder: Proposals, Worksheets, Buy Management and Revisions.

6. **Slidebar pin**

   - The pin controls the appearance and position of the slidebar in the Spot Buy Toolkit window.

   - Click [icon] to collapse the slidebar into a thin blue bar.

   - If the slidebar is collapsed, click [icon] to open the slidebar and position it in the current worksheet view.

7. **Rates panel**

   - This panel displays rates and effective dates for the selected avail line.

8. **Report tabs**

   - Use the report tabs to view Goals vs. Purchased By Week, Goals vs. Purchased and Daypart Mix data.

9. **Column filter**

   - The [icon] appears on most columns on the worksheet.

   - Click [icon] on any column to open a drop-down list of all unique values in the selected column. Select a value from the list to filter the worksheet.

   - The [icon] appears in blue to indicate the columns to which you have applied a filter.

   - To remove a filter, select All from the filtered drop-down list or click [icon] in the upper left corner of the Schedule panel.

10. Quick **View**

    - Use the Quick View feature to re-sort the data displayed on the Schedule panel. Select the appropriate view from the drop-down menu to re-sort the data in your worksheet.

11. **Schedule panel**

    - This panel contains avail lines that are imported or manually entered. It also contains a scheduling flowchart used to schedule spots.

12. **Demographics panel**

    - This panel contains information on the primary demographic category and any additional demos related to the selected avail line.

13. **Comments panel**

    - This panel contains avail line comments for the selected avail line. Click one of the following tabs to display additional avail line details: Avail Line Activity, Orbits, and Avail Notes.