System Navigation

MEplan's System Navigation focuses on navigating and working within the system efficiently. It covers:

1. **General MEplan Workflow** – An overview of the workflow within the MPlan system, providing guidelines on the typical steps for navigating and completing tasks.
2. **Dashboard** – Introduction to the dashboard interface, which is the central hub for monitoring and managing the system.
3. **Tour Guide** – A guided tour feature that helps new users familiarize themselves with the system and its main functionalities.
4. **Quick Navigation** – Methods to easily and rapidly move between different sections of the system.
5. **Tabs Within the Plan** – An explanation of how to manage and use different tabs in the system's plans for improved organization and efficiency.

- General MEplan Workflow Structure
- Dashboard
- Tour Guide
- Quick Navigation
- Tabs Within the Plan

General MEplan Workflow Structure

The general MEplan workflow structure is as follows:

- A ‘**New Plan’** (Campaign) is created. The **‘Plan’ view houses a topline view of each medium’s schedule** that has been created for that particular campaign/plan.
- The **Plan holds the schedules**. A user can see multiple mediums such TV, Digital, Radio etc. for that particular plan/campaign.
- **Plan Lines (The medium’s line items) lie within the Schedule.** On the left of the schedule a user can create the **details of the booking/s** and on the right is a scheduler giving a month/day view option where the **dates and Booking Deals** are held.
- **Booking Deals holding the financial information** of the bookings are found by right clicking on the booking itself.

Dashboard

- Once the user is logged in, the **dashboard for that specific user is displayed as the central workspace**. This dashboard provides a clear, real-time **overview of the user’s activity** and responsibilities within the system.
- **Recent plan activity** is shown on the left, allowing users to quickly access, review, or **continue working on the latest media plans and campaigns**. Each plan displays its current status and can be opened directly for further action. In the center, recent customer activity allows for **quick access to the Customer's information** such as brands, commission structures and financial information.
- At the top of the dashboard, high-level status indicators summarize the number of plans that are approved, in progress, awaiting approval, rejected, or completed. On the right-hand side, authorization and contract **status panels provide visibility into approvals, pending signatures, and completed items,** helping users prioritize next steps.
- From this dashboard, users can quickly select campaigns, navigate to specific plans or customers, and efficiently **manage their daily workflow** without needing to search through multiple menus.

Tour Guide

- Each page within MEplan includes a **question mark (?) icon** located on the top ribbon. This icon provides users with instant access to the **built-in Tour Guide** for that specific page.
- When selected, the Tour Guide launches an on-screen, **step-by-step walkthrough that highlights key features, buttons, and functions** relevant to the section the user is currently viewing. The guide explains what each area is used for and how to perform common actions.
- The Tour Guide is especially useful for new users, as it offers **contextual help without leaving the page**. It can also be used by experienced users as a quick refresher when navigating unfamiliar sections or new features. Users can progress through the guide at their own pace or exit at any time, making it a flexible and user-friendly **support tool embedded directly within MEplan.**

Quick Navigation

- MEplan offers multiple intuitive ways for users to navigate through the system efficiently.
- The main navigation tabs are displayed on the left-hand side of the screen and provide access to key areas of the system, such as the **Dashboard**, **Plans**, **Overviews**, and other core modules. This menu remains available throughout the system, allowing users to move between sections at any time.
- From the **Dashboard**, users can navigate directly into plans or customer records by selecting the highlighted hyperlinks. Plan names link through to the relevant plan, while customer names link to detailed customer information.
- On the **All Plans** page, users can quickly locate information by searching by campaign or by using the system-wide search functionality.
- The user's **current location within MEplan is clearly indicated in the header at the top of the page.** This header includes bolded items acting as hyperlinks that allow users to move directly to those sections of the system.
- Each page may also include tabs related to that section. The **active tab is clearly identified by a blue line beneath it**, making it easy to see which view is currently selected.
- Additional actions are available through the **Options** menus. **Blue circular options icons** appear on the right-hand side of pages for **page-level actions**, while **grey dot menu icons** appear next to individual line items for **item-specific actions.**
- Standard browser navigation can also be used, allowing users to move backward and forward through previously viewed pages using the browser's back and forward buttons.

Tabs Within the Plan

Each plan contains a set of tabs and sub tabs that organises all information and actions related to that specific plan or campaign.

General:

- **Schedules**: Contains all schedules associated with the plan.
- **Profile**: Displays the core plan details, including client information, duration, budget, and related metadata.
- **History**: Records key audit information, including when the plan was created and who has created or edited it.
- **Totals**: Highlights overall budget consumption, spend per purchase order, and spend by media type, clearly indicating areas where the plan has exceeded the allocated budget.
- **Resources**: Displays the Resources which have been assigned to the plan/campaign.
- **Media Purchase Orders:** Provides the ability to view and create media orders including associated media order functions.

Detail:

- **Documents**: Stores all relevant documentation, including contracts, purchase orders, Telmar files, and related materials.
- **Authorisations**: Displays outstanding and completed authorisations, such as contracts requiring approval or signature.
- **Comments**: Provides a space for internal communication and collaboration related to the plan.
- **Campaigns:** Lists all campaign which are linked to the plan.
- **Plan Lines**: Contains all plan line items associated with the plan or campaign.
- **Vendor Contracts:** Lists all OOH vendor contracts which are linked to the plan.
- **Compliance Images:** All OOH proof of fighting images received from the vendor are stored here.

Budgets:

- **Customer POs:** Provides the ability to view and create customer purchase orders.
- **Currency Deals:** Stores and lists currency deals also allowing to create new currency deals.
- **Medium Types:** Lists the budget by medium breakdown.

Reporting:

- **Analysis**: Enables users to create customisable pivot report templates to showcase key data for the specific plan or campaign.
- **Compare:** Allows comparison reports to be generated in order to compare plan revisions.

- **Plan Lines:** Displays all individual bookings on the plan with all associated data fields.

These tabs allow users to efficiently access, manage, and analyse all aspects of a plan from a single, structured view.