MARS Medical User Guide

KANTAR MEDIA

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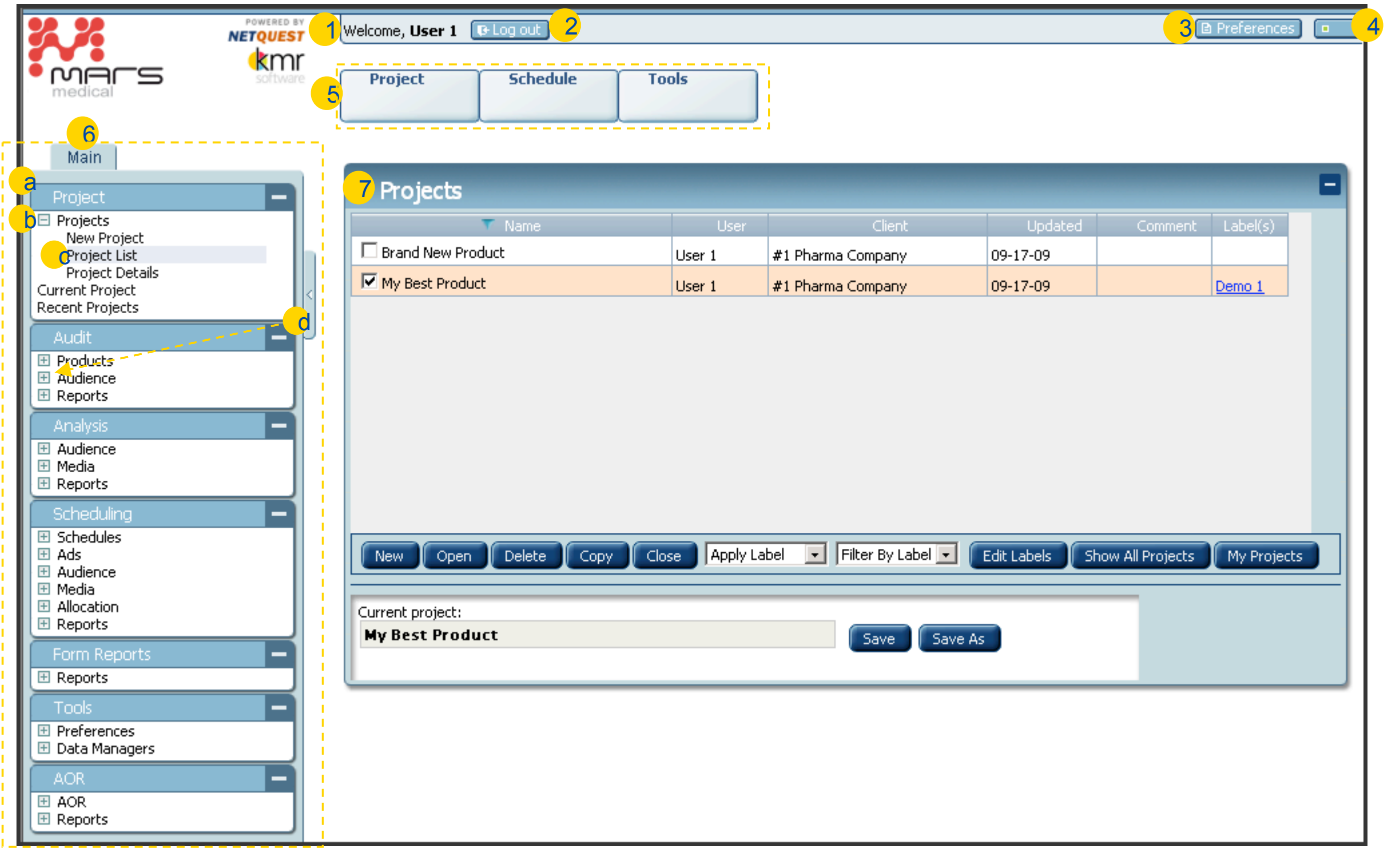
Navigating MARS Media

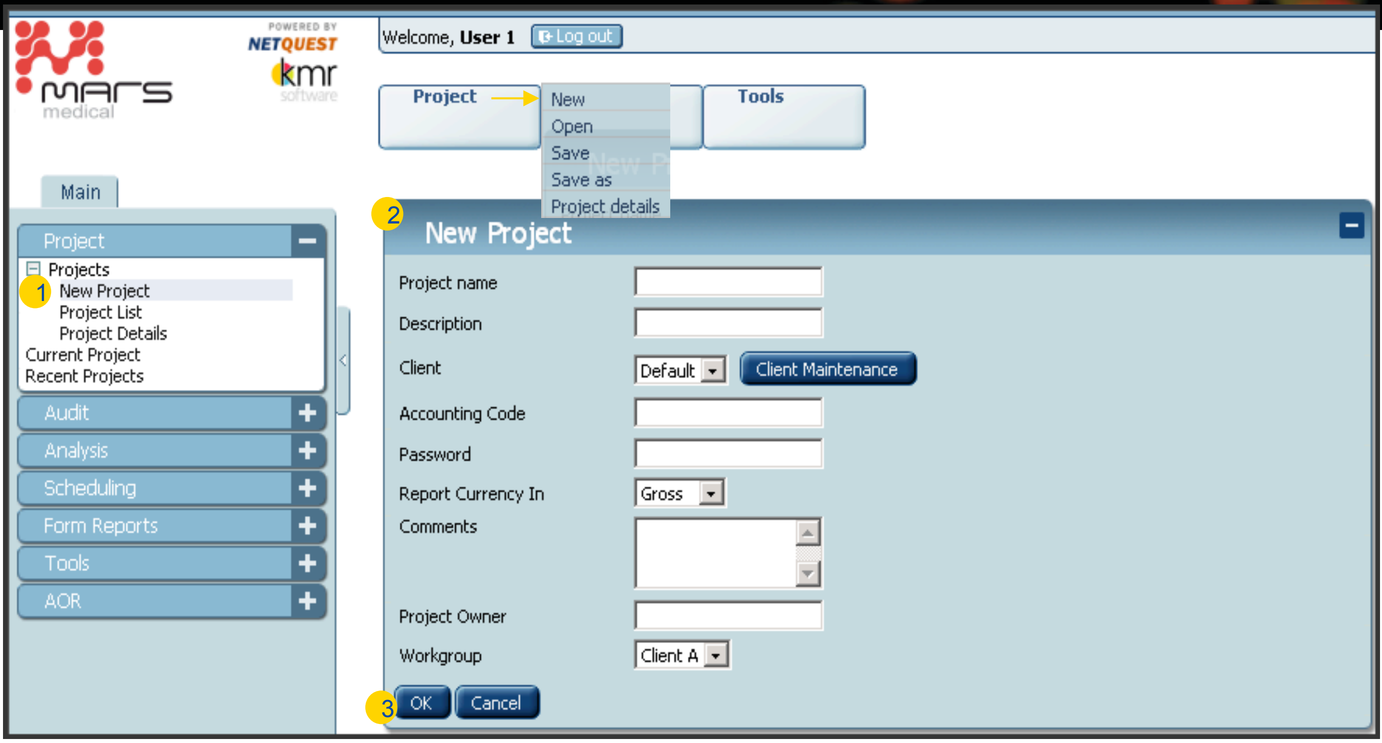


Navigating MARS Medical

1. **Welcome:** displays the user name assigned to the login account.
2. **Logout:** click the **Logout** button to close current session and save changes.
   System and database updates are regularly performed in the late evening hours. Open session are automatically closed during updates. Not logging out properly can result in loss of work.
3. **Preferences:** area to change select user and system preferences.
4. **Progress Meter:** indicates when a web page is done loading.
   - Red moving dots indicate that the loading process is in progress. Do not click any buttons or changes the page while the page loading is in progress. This can results in loss of work.
   - Green dot indicates that page loading is complete and you may continue working in the system.
5. **Quick Access Toolbar:** quick and convenient access to the Projects, Schedules and Tools folders. This area also contains the Project and Schedule **Save** function.
6. **Main Navigator:** area to access all MARS functions and navigate thru the system.
   a. **Modules**: the Main Navigator has 7 modules.
   b. **Module Folders:** Each Module has a set of folders that are divided by module functions and house the links to the function worksheet.
   c. **Worksheet Links:** Click the **Worksheet Links** to open the Worksheet it in the center area. Active worksheets are highlighted in the blue under the Main Navigator.
   d. **Expand/Collapse buttons**
      -Click the plus or right arrow buttons to **expand** windows/folders.
      -Click the minus or left arrow buttons to **collapse** windows/folders.
7. **Worksheets:** All work and reporting are completed in Worksheets**.** Click the **Worksheet Link** under the **Main Navigator** to open the Worksheet in the center area. Active Worksheets are highlighted in blue under the Main Navigator.

Project

Overview – Creating & Editing Projects



Project Overview

To begin working in MARS Medical a Project must first be opened by either creating a new project or opening an existing project. All Project functions can be accessed via the Main Navigator or Quick Access Toolbar.

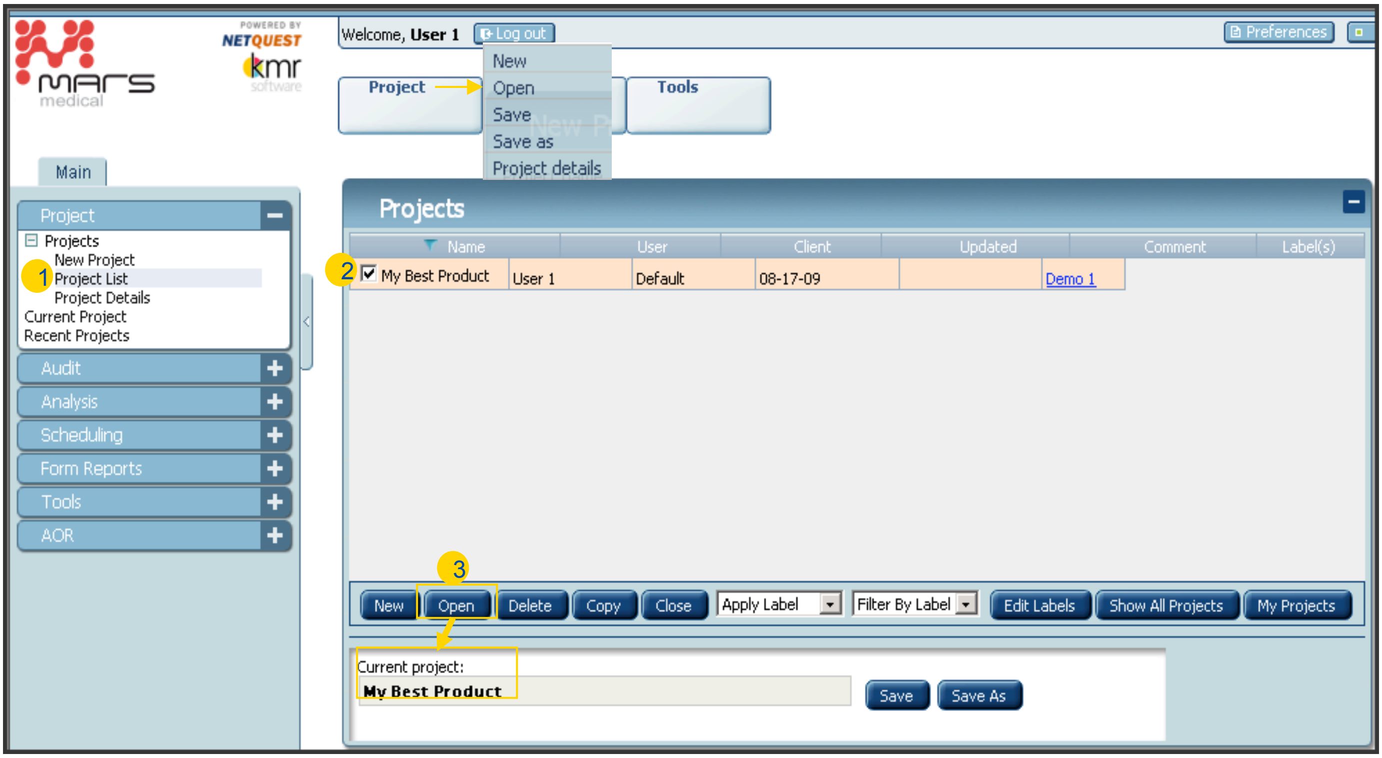
Creating a New Project

1. Click **New Project** under the **Project** folder in the **Main Navigator** or **Quick Access Toolbar**. The New Project worksheet will open.
2. Complete the form in the New Project worksheet
   - Project Name is required. All other fields are optional.
   - Client: select an existing client from the dropdown or click the Client Maintenance button to create a new client record.
   - Report Currency In: select to report currency in Gross, Net or Net CD. Note that currency for Audit reports is set by the report format chosen and overwrites any currency selection made here.
3. Click the **OK** button to save Project and add to the Project List.

Edit/View Project Details

1. Click **Project Details** in the **Project** folder in either **Main Navigator** or **Quick Access Toolbar**.
2. View or make necessary edits.
3. Click the **OK** button to save Project changes.

Project
Opening Existing Projects



Opening Existing Projects

1. Click **Project List** under the **Project** folder of the **Main Navigator** or **Quick Access Toolbar**. The Projects worksheet will open. Projects from all workgroup members are included in the project list.
3. Select project by clicking on the checkbox next to the project name.
4. Click the **Open** button to open the selected project. The project name will display in the **Current Project** field. Once the name is displayed in this field, you can begin working in the project.

Filtering/Sorting Project Lists

The default project list includes projects from all Workgroup members. Use the following options to sort and filter the project list:

- **Sorting:** Click the column labels to sort project list by the selected column
- **Label Filters:** Create Project "Labels" and assign them to individual projects to further segment your project list.
  - To add a Label, select the Project and then select a label from the **Apply Label** dropdown.
  - To filter by a select Label, select a label from the **Label Filter** dropdown.
- **My Project:** Click button to filter list to only include your projects.
- **Show All Projects:** Click button to display all Workgroup projects.

Scheduling

Overview – Creating New Schedules

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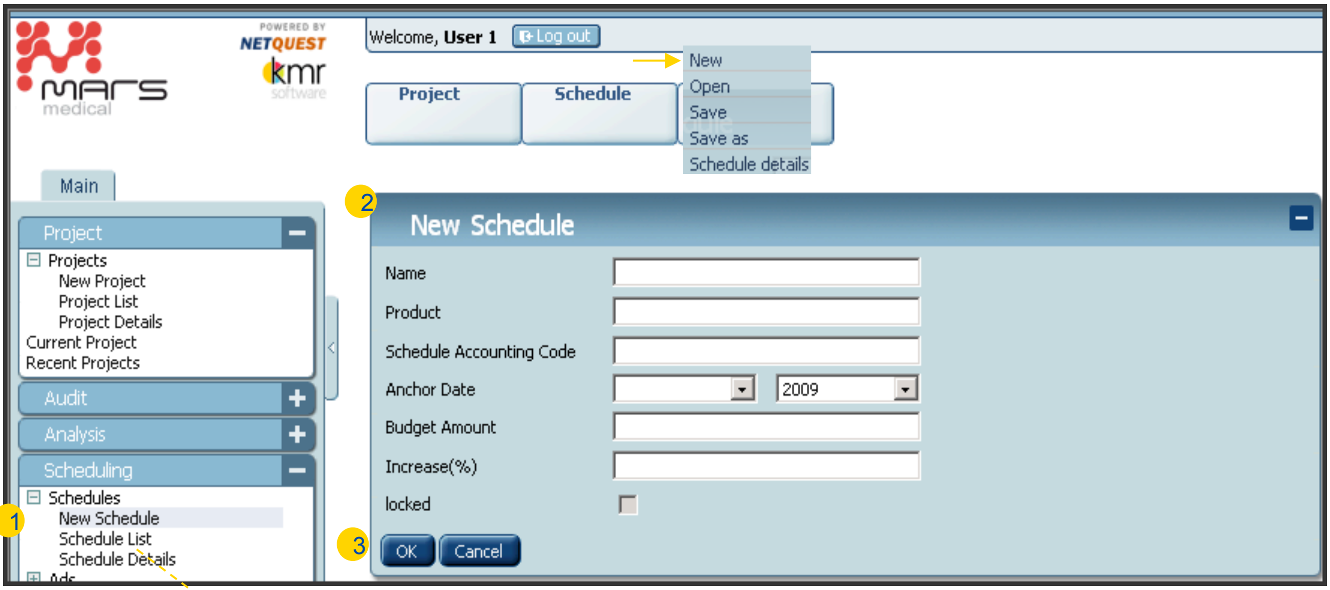


Scheduling Overview

Schedules are created within Projects. Projects may include multiple Schedules. Schedules can be accessed via the Main or Quick Access toolbars. A Project and a Schedule must be open to perform any Scheduling functions.

Saving Schedules: It is important to frequently save your work when in Scheduling. Schedules are NOT automatically saved. If the browser window is closed for any reason without saving, work will be lost.
To save a Schedule go to the Quick Access **Schedule** button and select **Save**.

Creating New Schedules

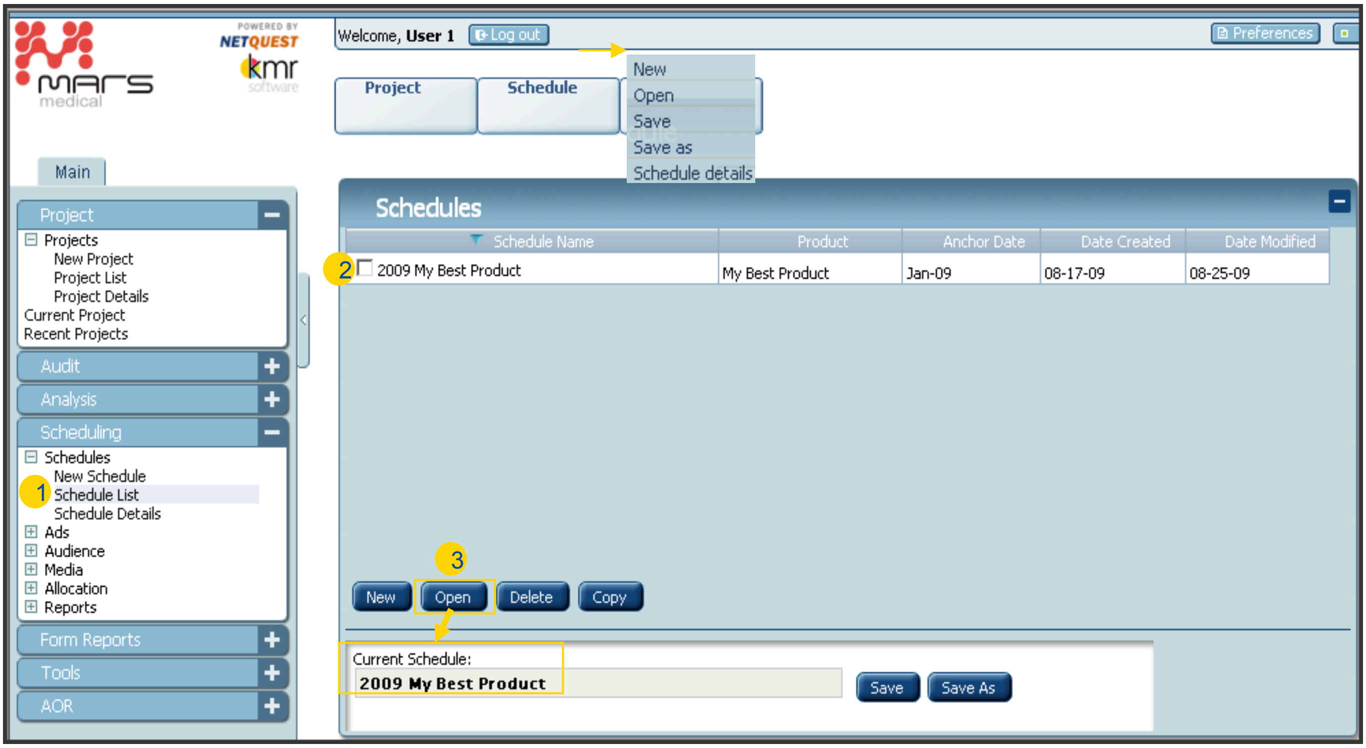
1. Click **New Schedule** under the **Schedule** folder in the Main Navigator or Quick Access Toolbar. The **New Schedule** worksheet will open.
2. Complete the form in the **New Schedule** worksheet
   - Schedule Name, Product and Anchor Date are required. All other fields are optional.
3. Click the **OK** button to save Schedule and add it to the Schedule List.

Editing/Viewing Schedule Details

Once a Schedule has been created, the details can be edited at any point using the **Schedule Details** worksheet.

1. Click **Schedule Details** under the **Schedule** folder of the Main or Quick Access toolbars. The Schedule Details worksheet will open.
2. View or edit Schedule Detail information
3. If edits are made, use the Quick Access **Schedule** button and select **Save**.
4. Click the **OK** button after you save any changes. Click the OK button in the save reminder box.

Scheduling
Opening Existing Schedules



Opening Existing Schedules

Once a Schedule has been created it can be opened/accessed using the **Schedules: Schedule List** worksheet.

1. Click **Schedule List** under the **Schedules** folder of the Main Navigator or Quick Access Toolbar. The Schedules worksheet will open. All schedules created under the project will appear.
3. Select schedule by clicking on the checkbox next to the schedule name
4. Click the **Open** button to open the selected schedule. The schedule name will display in the Current Schedule field. Once the name is displayed in this field, you can begin working in the schedule.

Scheduling

Ads: Overview – Creating Ad Pages

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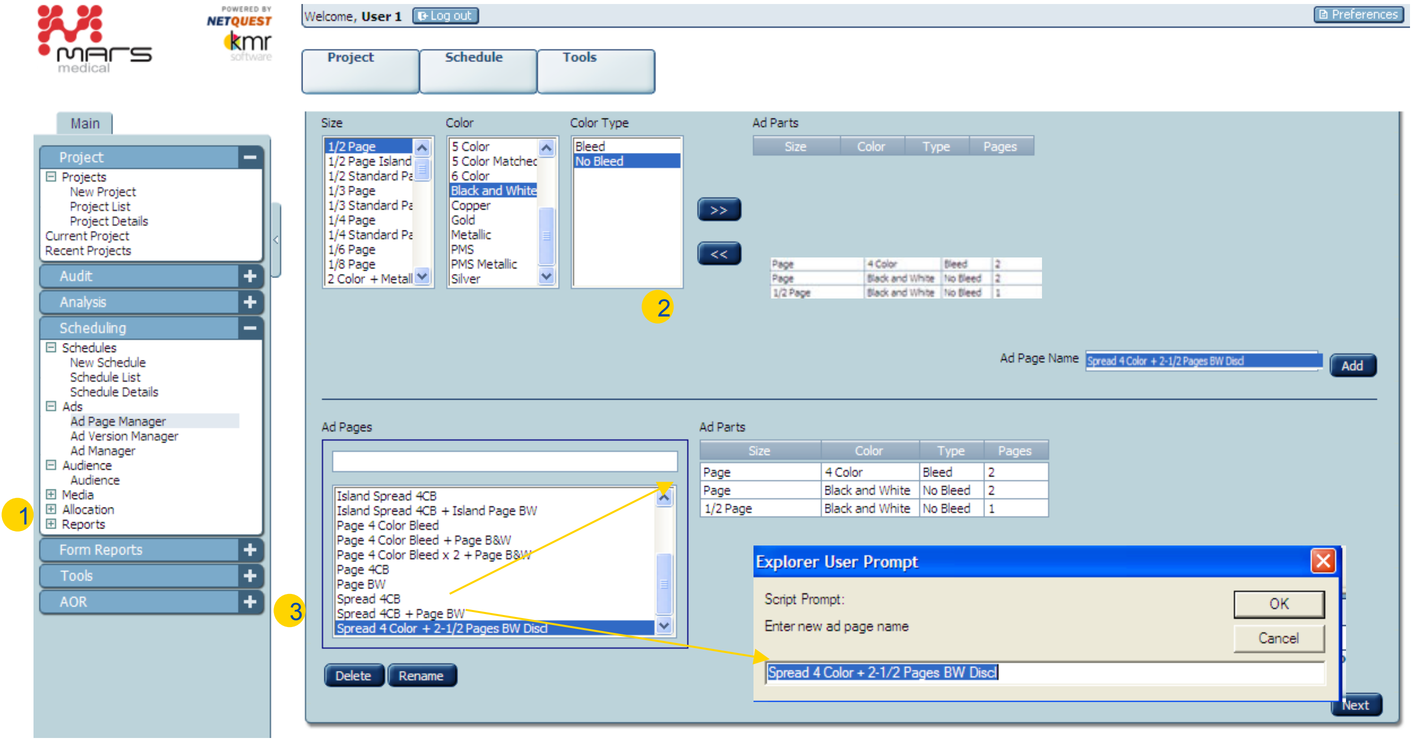

Ads Overview

Schedule Ad Units are created and managed using the worksheets **Ads** in the Ads folder. Ad Units consist of two parts: an Ad Page and a Version Code. Once an Ad Unit is created it is stored in MARS and is available for future use in all schedules in all workgroups within your company.

Creating an Ad Page

Ad Pages are created using the **Ad Page Manager**. Once an Ad Page has been created it is stored in MARS and is available for future use in all schedules in all workgroups within your company. **Note: Requests for non-traditional ad sizes (e.g. digital media) should be submitted to Client Services so that they can be programmed into the Size box for selection.**

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Creating an Ad Page

1.Click **Ad Page Manager** under the **Ads** folder. The **Ad Page Manager** worksheet will open.
2.Select a **Size**, **Color** and **Color Type** from the list boxes. Click the add “**>>**” button to combine and display the parts in the **Ad Parts** grid. To remove the selected ad parts, highlight the row and click the remove “**<<**“ button.
3.Enter an ad page name in the **Ad Page Name** field and click the **Add** button to save the new ad page and add to your workgroup’s **Ad Pages** list.

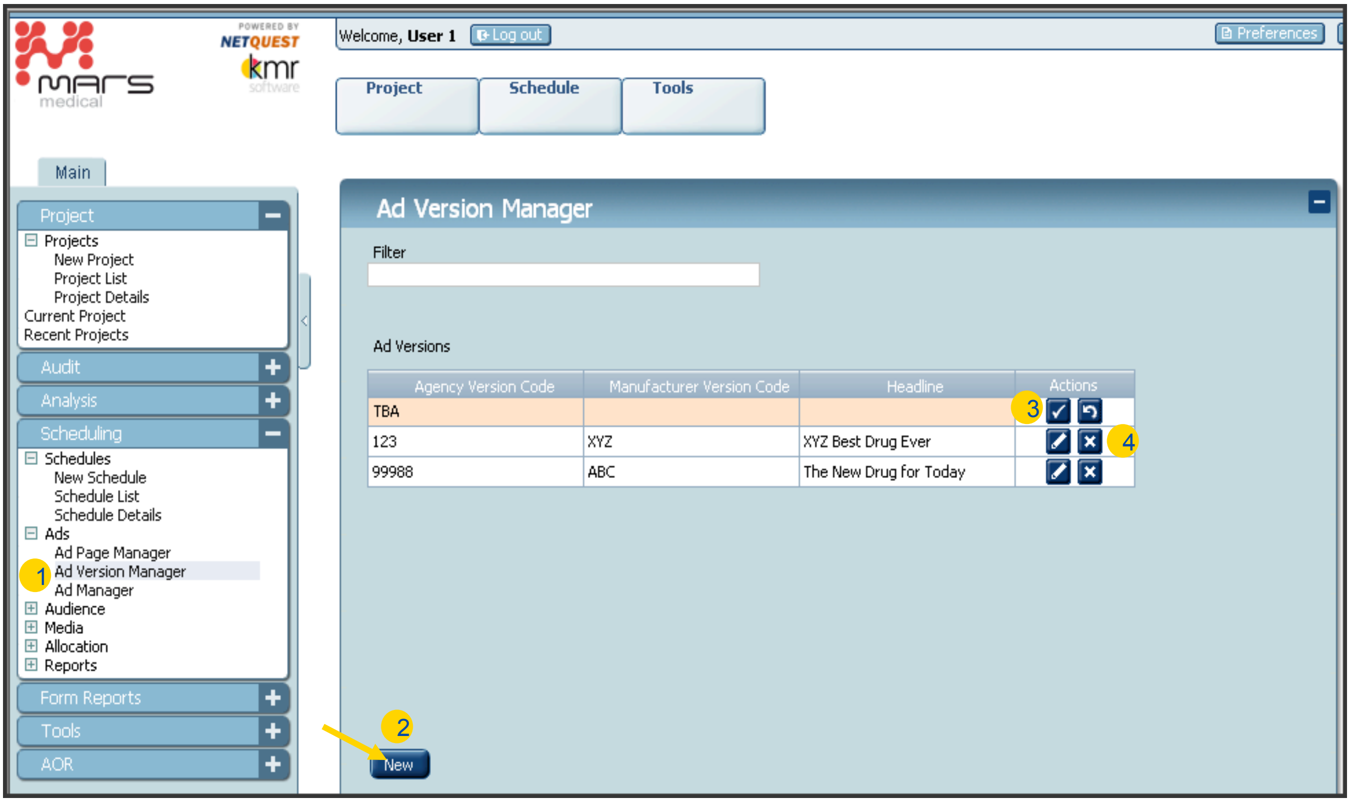
Viewing/Renaming an Existing Ad Page

•To view the parts that make-up an Ad Page, select the ad page under the **Ad Pages** list. The ad page parts are displayed in the **Ad Parts** grid.
•To rename an ad page, select the ad page under the **Ad Pages** list. Enter the new name in the prompt and click the **OK** button to save.

•NOTE: Default ad units appearing in the Ad Pages screen cannot be deleted or renamed.

REMEMBER TO SAVE FREQUENTLY

Scheduling
Ads: Creating Ad Version Codes



Creating an Ad Version

Ad Version are created using the **Ad Version Manager**. Once an ad version has been created it is stored in MARS and is available for future use in all schedules created within a workgroup.

1. Click **Ad Version Manager** under the **Ads** folder. The **Ad Version Manager** worksheet will open.
2. In the **Ad Version Manager** worksheet, click the **New** button. A row for a new ad version labeled “TBA” is added to the top of the **Ad Version** grid.
   ***HINT:* If the ad version has not yet been determined, use TBA and some other identifier for the version, e.g. TBA-Launch Product A. When the version is finalized, edit and save the version name. Everywhere TBA-Launch Product A was scheduled will show that version name replaced with the current version name.**
1. To edit the Ad Version Codes and Headline, click the edit button next to the ad. Enter the **Agency Version Code**, **Manufacturer Version Code**, and **Headline**. Click the complete button to save the Ad Version or the cancel button to cancel edits.
2. To delete an Ad Version, click the delete button next to the Ad Version.

REMEMBER TO SAVE FREQUENTLY

Scheduling
Ads: Creating Ad Units

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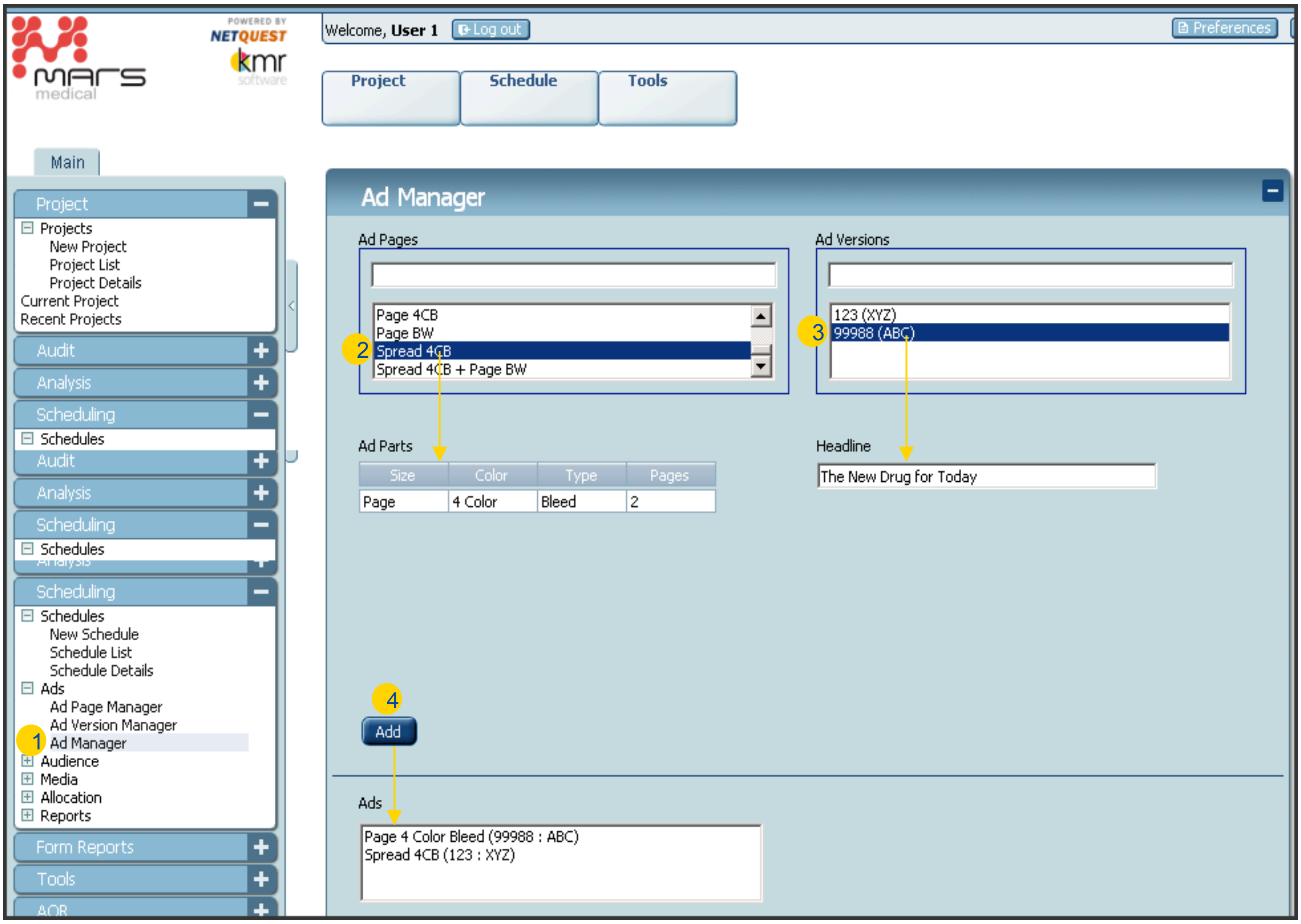


Creating an Ad Unit

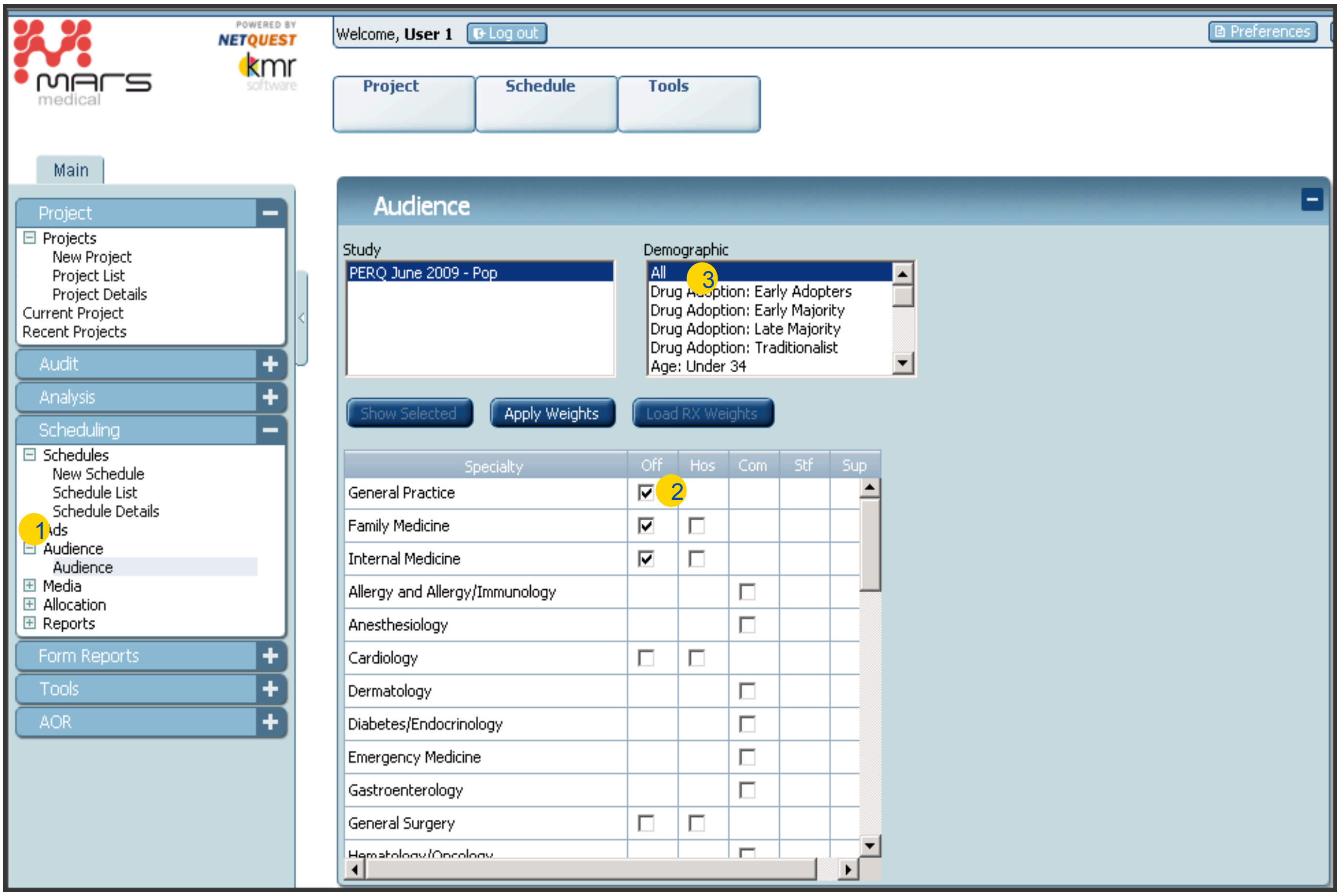
Ad Units are created and managed using the **Ad Manager**. Once an ad unit has been created it is stored in MARS and is available for future use in all schedules in all workgroups within your company.

1. Click **Ad Manager** under the **Ads** folder. The **Ad Manager** worksheet will open.
2. Select an ad page under the **Ad Pages** list. The Ad Pages list contains all ad pages created in the Ad Page Manager.
3. Select an ad version under the **Ad Versions** list. The Ad Versions list contains all ad versions created in the Ad Version Manager.
4. Click the **Add** button to combine the selected ad page and ad version to create and save the new ad unit. The ad unit will appear in the **Ads** list at the bottom of the screen.

REMEMBER TO SAVE FREQUENTLY

Scheduling

Audience: Defining Target Audience for R&F Reporting

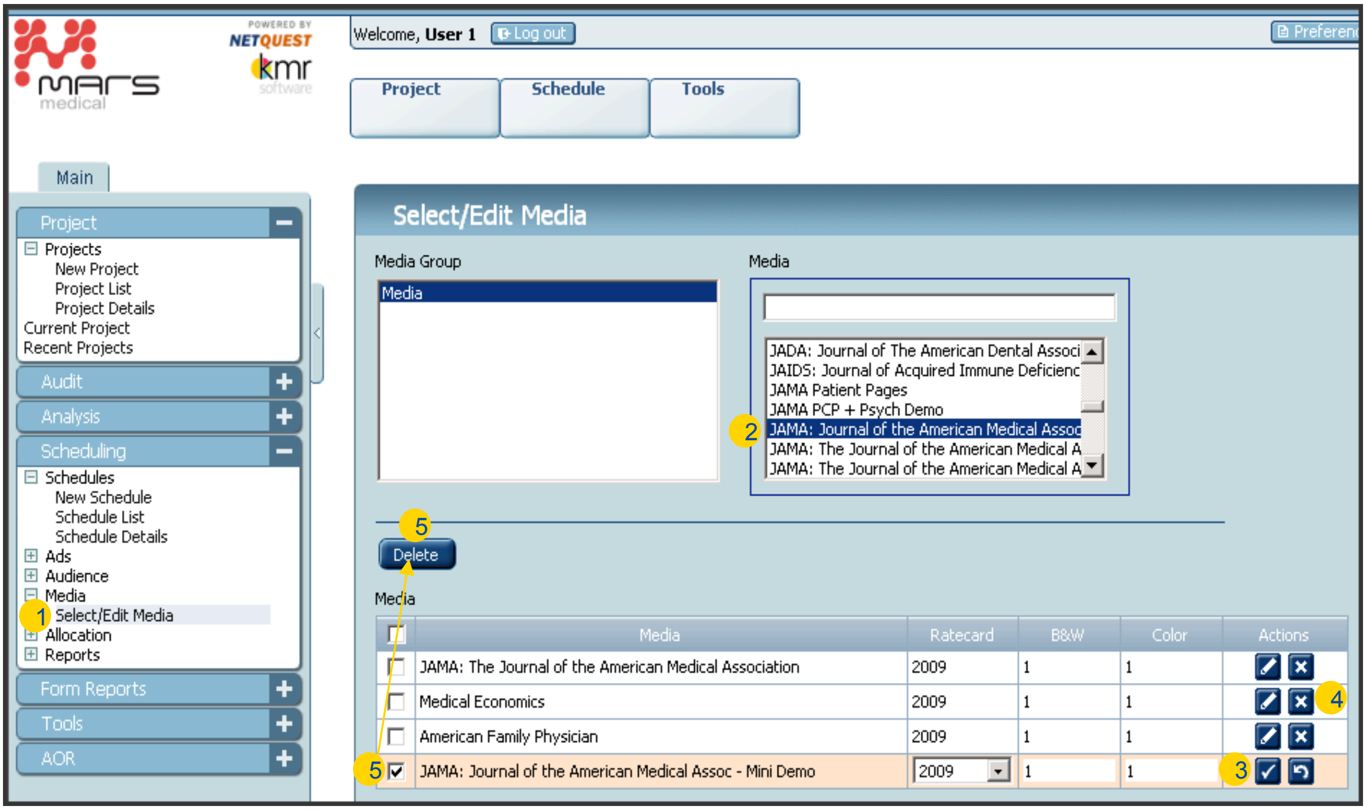


Defining Target Audience for Reach & Frequency Reporting

To generate Reach and Frequency and Specialty Impressions reports, it is necessary to define your target audience by specialty using the **Audience** worksheet. Audience definitions are stored within the Schedule for future use.

1. Click **Audience** under the **Audience** folder. The **Audience** worksheet will open.
2. To select a target audience, click on the checkbox next to **Specialty** name. Specialties are defined by one or more of the following:
   - Off: office practice
   - Hos: hospital practice
   - Com: combined office and hospital practice
   - Stf: pharmacy staff
   - Sup: pharmacy supervisor/manager
3. To filter a target audience by a demographic, select a demographic under the **Select Demographic** list. Available demographics are based on the audiences selected and must be available for all selected audiences.

Scheduling
Media: Selecting/Editing Schedule Media



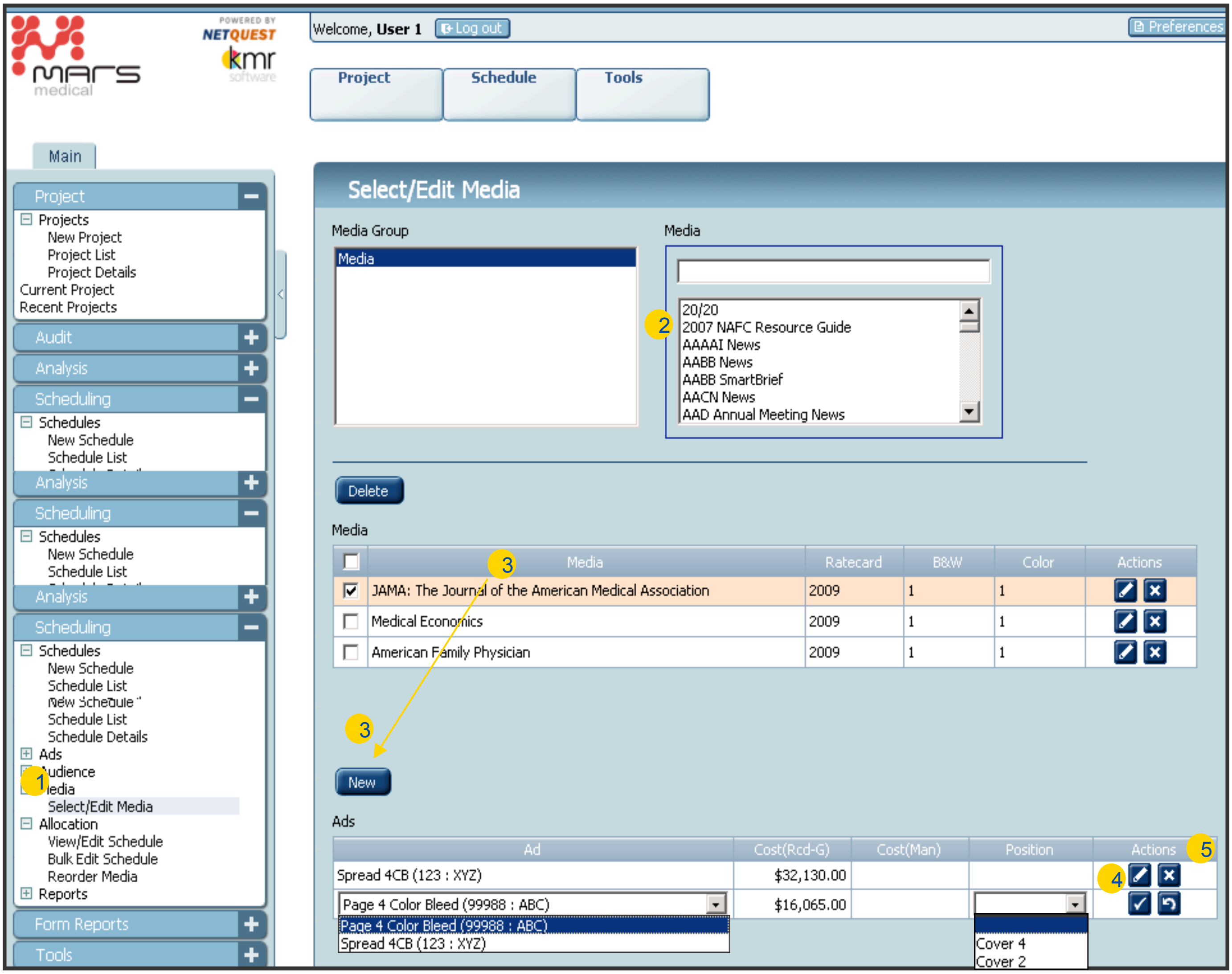
Selecting and Editing Schedule Media

Selecting and editing schedule media is performed in the **Select/Edit Media** worksheet.

1. Open a Schedule and click **Select/Edit Media** under the **Media** folder
2. To select media, click on the media name in the **Media** list. Media are listed in alphabetical order. Use the word search option above the list to narrow your media list. Selected media will appear in the **Media** grid.
3. To edit the media Ratecard, B&W or Color frequency, click the edit button next to the media. When completed making edits, click the complete button to enter edits or click the cancel button to cancel the edits.
4. To delete individual media, click the delete button next to the media.
5. To delete multiple media at a time, click on the checkboxes of the media to be deleted and click the **Delete** button above the **Media** grid.

REMEMBER TO SAVE FREQUENTLY

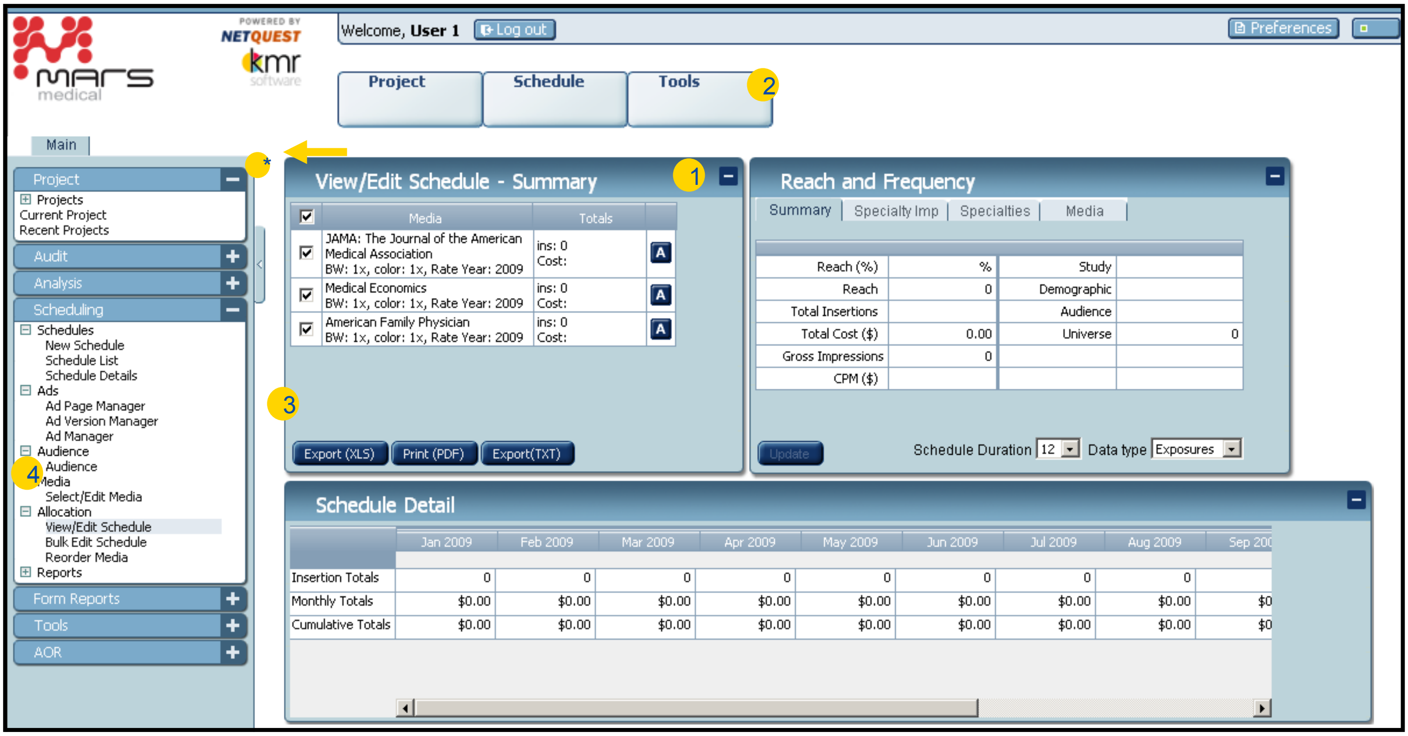
Scheduling
Media: Assigning Ad Units



Assigning Ad Units to Media

Ad Units must be assigned to Media prior to allocating insertions. This function is completed in the **Select/Edit Media** worksheet. Cost and position for each ad assigned to media are also defined in this area.

1. Click **Select/Edit Media** under the **Media** folder. The **Select/Edit** worksheet will open.
2. Select schedule media. *See previous slide.*
3. To assign ad units to the schedule media, select the media by clicking on the media name under the **Media** grid **Media** column (media will highlight) and click the **New** button. A list of ad units assigned to the media will appear in the **Ads** grid defaulted to the first ad unit in the ad unit list.
4. To edit an ad unit assignment or set a Manual Cost or Position, click the edit button next to the ad unit, make the necessary edits and click the complete button to save or the cancel button to cancel edits.
5. To delete an ad unit assignment, click the delete button next to the ad unit.
   Warning: Deleting an ad unit that has already been allocated to the schedule you are working in, will automatically remove it from all schedule allocations.



Allocation Overview

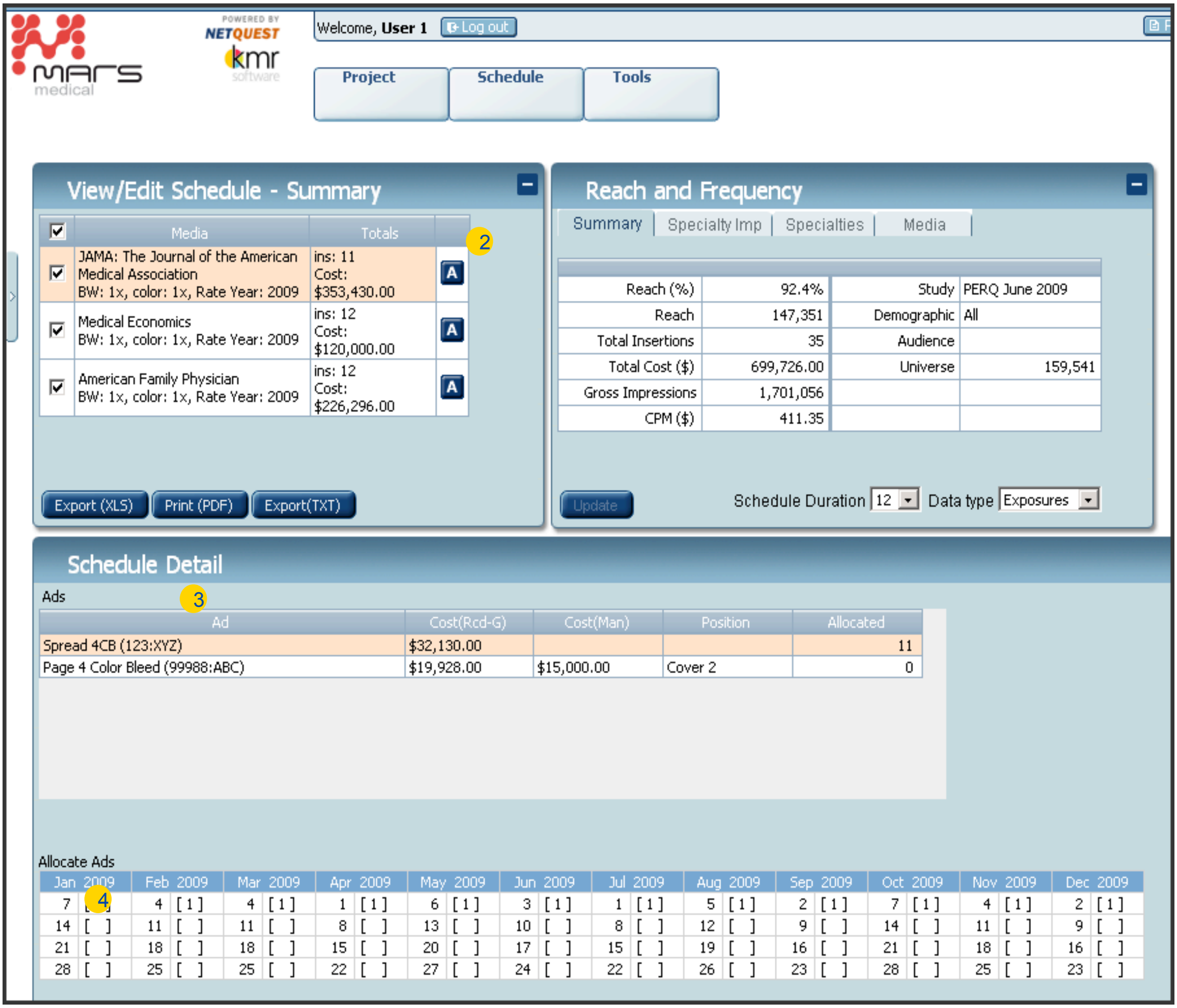
The following functions can be performed in the **Allocation** area:

1. Allocate, edit and delete individual ad insertions.
2. View allocated schedule Reach and Frequency analysis as a schedule is being created.
3. View, print, and export Schedule Detail report
4. Perform bulk schedule edits and reorder media display sort order

***Tip**: to optimize the Allocation worksheet view, minimize the Main Navigator by clicking the minimize arrow.

Scheduling

Allocation: Allocating Ads



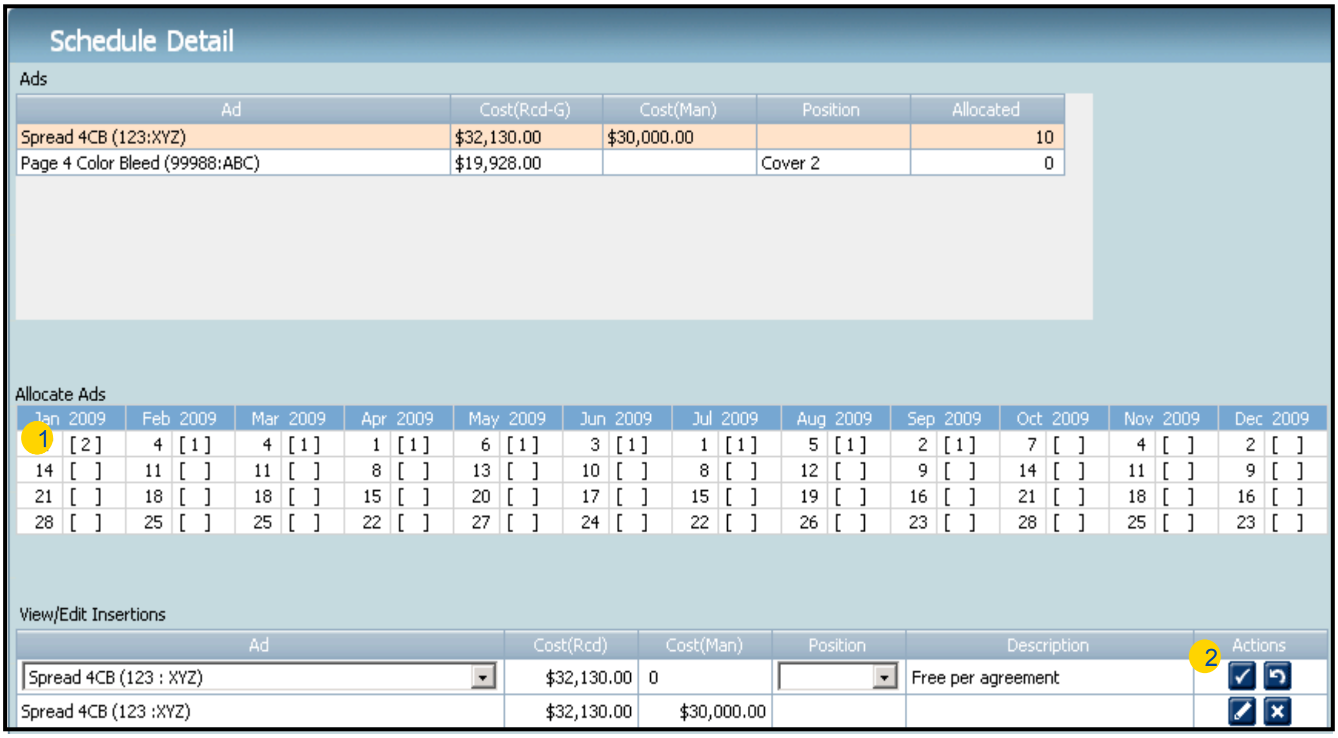
Allocating Ads

Ad allocation is performed in the **View/Edit Schedule: Schedule Detail** worksheet.

1. Select **View/Edit Schedule** under the **Allocation** folder (see previous slide).
2. To select media for allocation, go to the **View/Edit Schedule – Summary** worksheet and click the **A** (Allocate) button to the right of the media. Upon clicking, the ad units that have been assigned to the media will appear in the **Ads** grid in the **Schedule Detail** worksheet.
3. To select ad unit for allocation, click on the ad description under the **Ad** column. Upon selecting an ad the **Allocate Ads** grid will appear below with all available issue dates for the selected media.
4. To allocate the selected ad unit, click on the white space between the brackets of the issue date – one click per insertion. The **View/Edit Schedule Summary** worksheet **Totals** column automatically updates as ads are allocated.

Scheduling

Allocation: Editing/Deleting Individual Ad Insertions



Ad Allocation: Editing and Deleting Individual Ad Insertions

Editing and deleting *individual* ad insertions is performed using the **View/Edit Schedule: Schedule Detail** Worksheet. To edit or delete an ad across all insertions, use the **Select/Edit Media** worksheet under the **Media** folder (see Assigning Ad Units to Media page).

<u>Editing Individual Ad Insertions</u>

See Step 1-3 under Allocating Ads to select the ad to be edited.

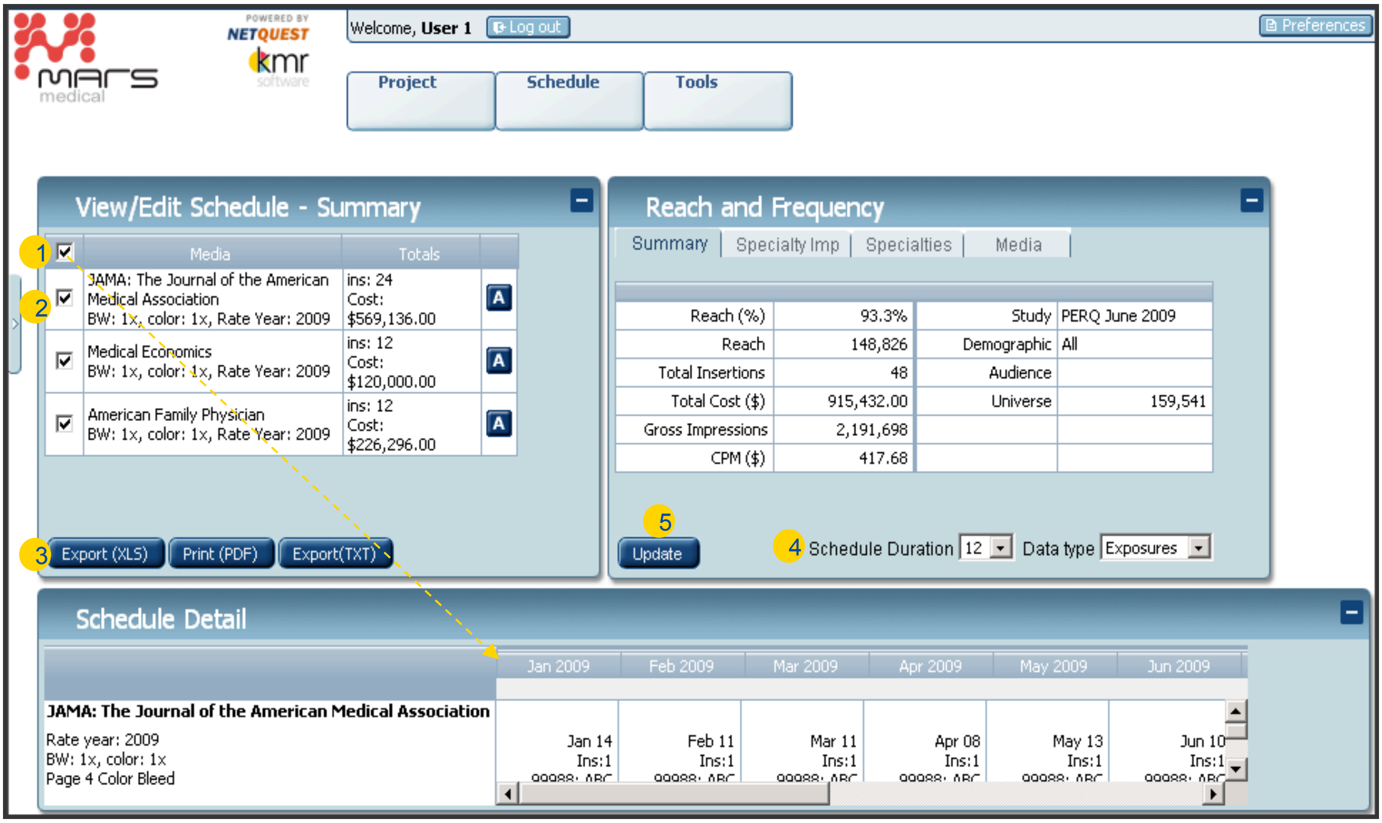
1. Click on the issue date number of the insertion to be edited under the **Allocate Ads** grid. The **View/Edit Insertions** grid will appear below with a list of ads allocated under the selected insertion.
2. To edit the ad, click the edit button next to the ad and make necessary edits. Note, edits will only impact the selected ad insertion. When done making edits, click the complete button to save edits or the cancel button to cancel the edits.

<u>Deleting Individual Ad Insertions</u>

1. Follow step #1 above to select the ad.
2. To delete the allocation, click the delete button to the right of the ad.

Scheduling

Allocation: Viewing & Printing Allocation Results



Viewing & Printing Schedule Detail

Ad allocation results may be viewed under the **View/Edit Schedule: Schedule Detail** worksheet.

1. To view all media in the **Schedule Detail** worksheet, click the checkbox at the top of the **View/Edit Schedule – Summary** worksheet.
2. To view select media in the **Schedule Detail** worksheet, click the checkboxes next to the individual media names.
3. To print or export the **Schedule Detail** view, click the **Export (XLS), Print (PDF)** or **Export (TXT)** buttons.

Viewing Schedule Reach & Frequency Reports

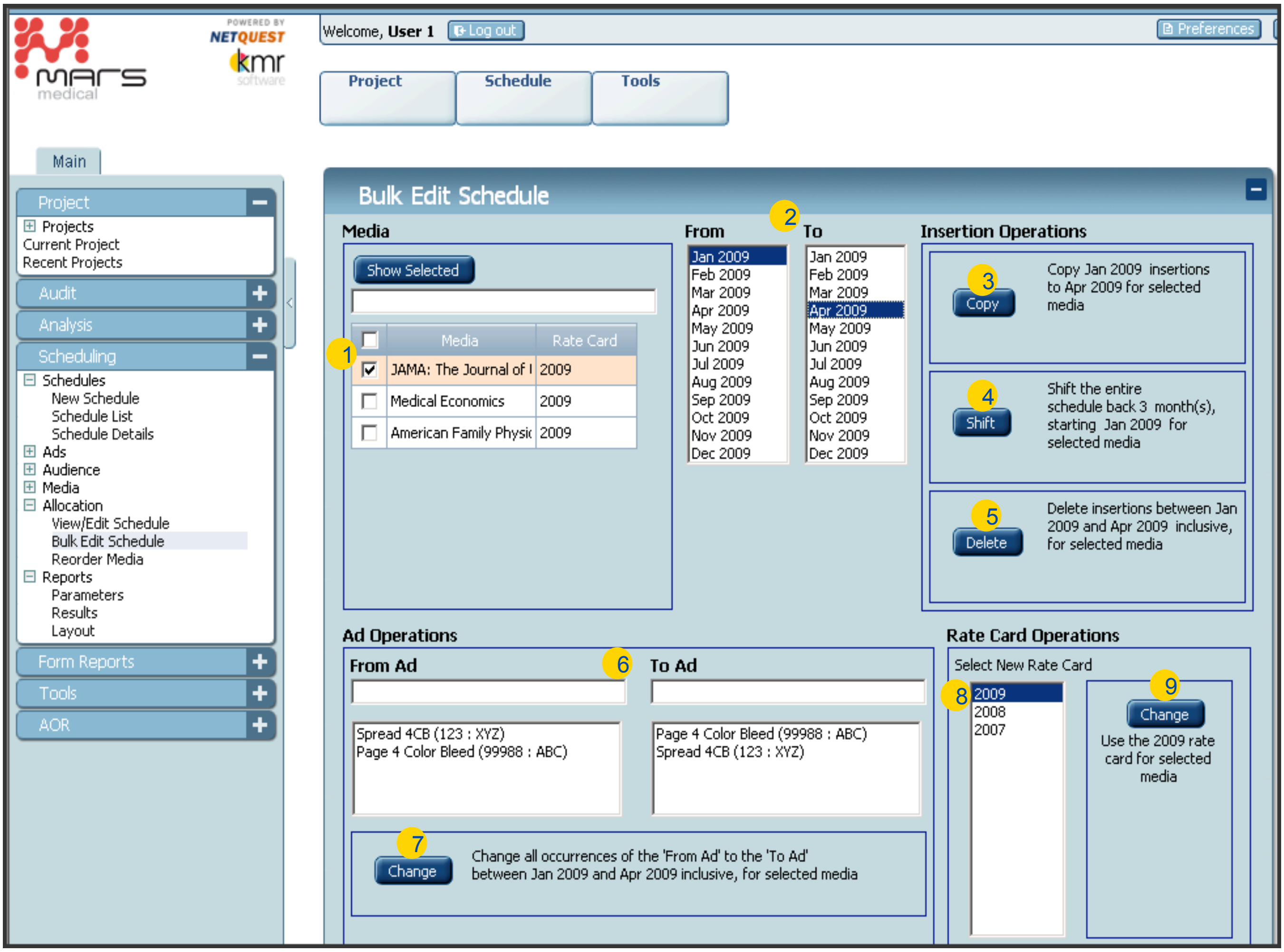
Reach and Frequency metrics may be viewed while ads are being allocated to a schedule in the **Reach and Frequency** worksheet. There are four reports that can be viewed in this area: Summary, Specialty Impression, Specialties and Media reports.

4. Select a **Schedule Duration*** and **Data Type** from the dropdowns.
5. Click the **Update** button in the **Reach and Frequency** worksheet. Every time a revision is made to the schedule, click the **Update** button to refresh the **Reach and Frequency** reports.

* **Schedule Duration** refers to the intervals you want to see on your R/F. If you set the **Schedule Duration** to 12, the frequencies will be 1, 12, 24, 36… If you set the interval to 6, the frequencies will be 1, 6, 12, 18, 24

Scheduling

Allocation: Bulk Schedule Editing



Bulk Schedule Editing

Bulk schedule media edits are performed under the **Bulk Edit Schedule** worksheet. Edits performed in this area are automatically applied to the **Schedule Detail**. The following bulk edits can be performed in this area:

Insertion Operations: Use the following functions to perform bulk media insertions edits.

1. Select media by clicking on the checkbox next to the media name under the **Media** list.
2. Select a **From** date and a **To** date.
3. **Copy:** click to copy media insertions allocated in the selected **From** month to selected **To** month.
4. **Shift:** click to shift the entire media schedule from the selected **From** month to start at the selected **To** month.
5. **Delete:** click to delete all insertions between selected the **From** and **To** months.

Ad Operations: Use this function to change all occurrences of a selected ad to another ad during the selected time period.

Follow Steps 1-2 under Insertions Operations.

6. Select a **From Ad** (ad that needs to be changed) and a **To Ad** (ad that the **From Ad** needs to be changed to).
7. Click the **Change** button.

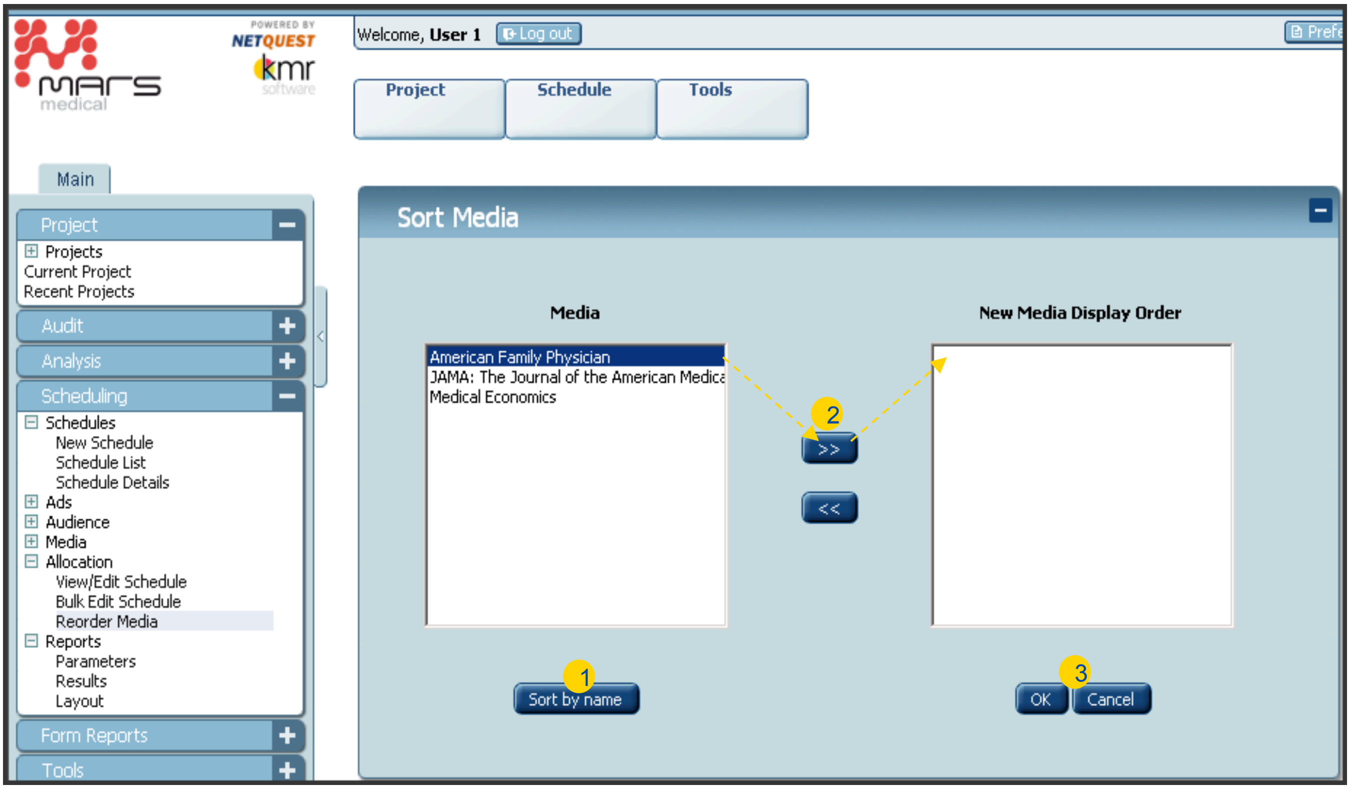
Rate Card Operations: Use this function to change the rate card of selected media

Follow Steps 1 under Insertions Operations.

8. Select a new rate card year in the **Select New Rate Card** list
9. Click the **Change** button.

Scheduling

Allocation: Reordering Media

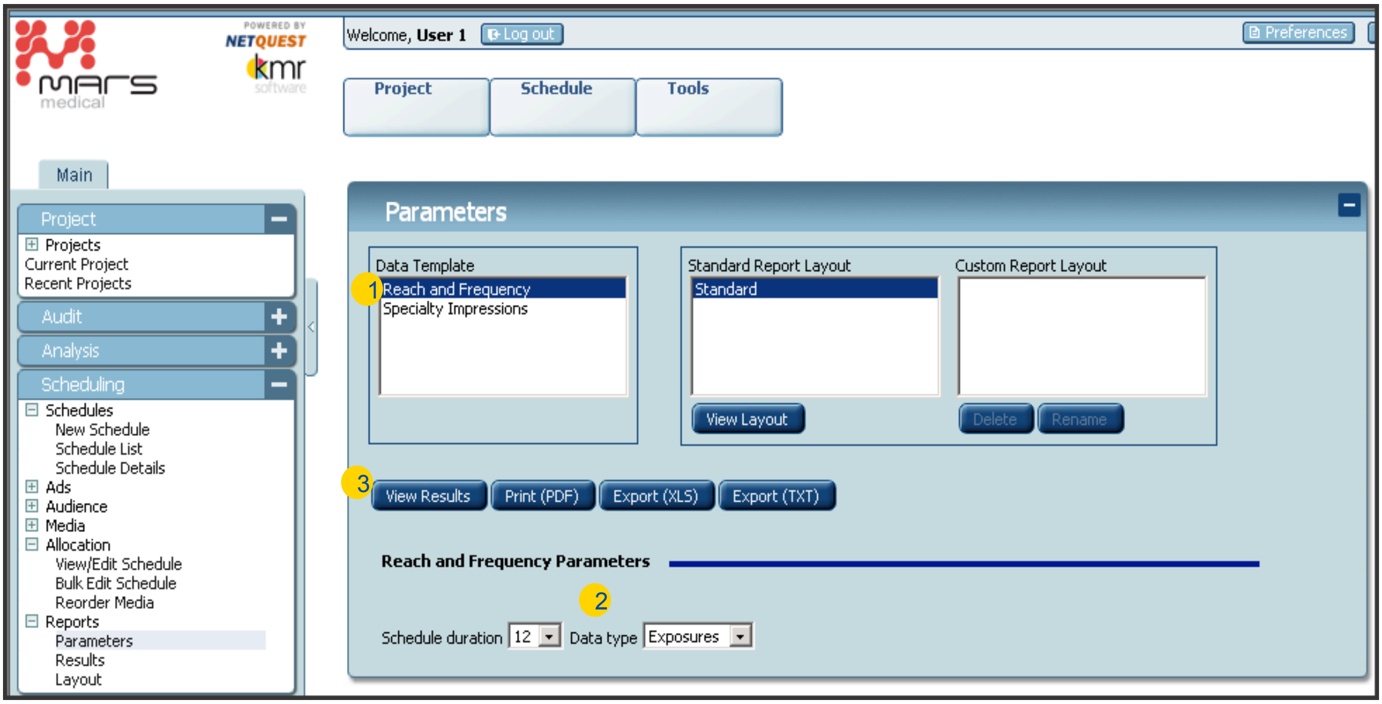


Reordering Media in Schedule Detail

Reordering media in the **Schedule Summary** and **Detail** worksheets is performed in the **Reorder Media** worksheet.

1. To order all schedule media alphabetically by media name, click the **Sort by name** button.
2. To order media individually in preferred order, select the media under the **Media** list and click the **>>** button to add to the **New Media Display Order** list and the **<<** to remove from the **New Media Display Order** list.
3. When completed, click the **OK** button. Upon clicking **OK** the **View/Edit Schedule** worksheet will open with the newly reordered media appearing in the **Schedule Summary** and **Detail** worksheets.

Scheduling
Reports: Printing & Exporting R&F Reports



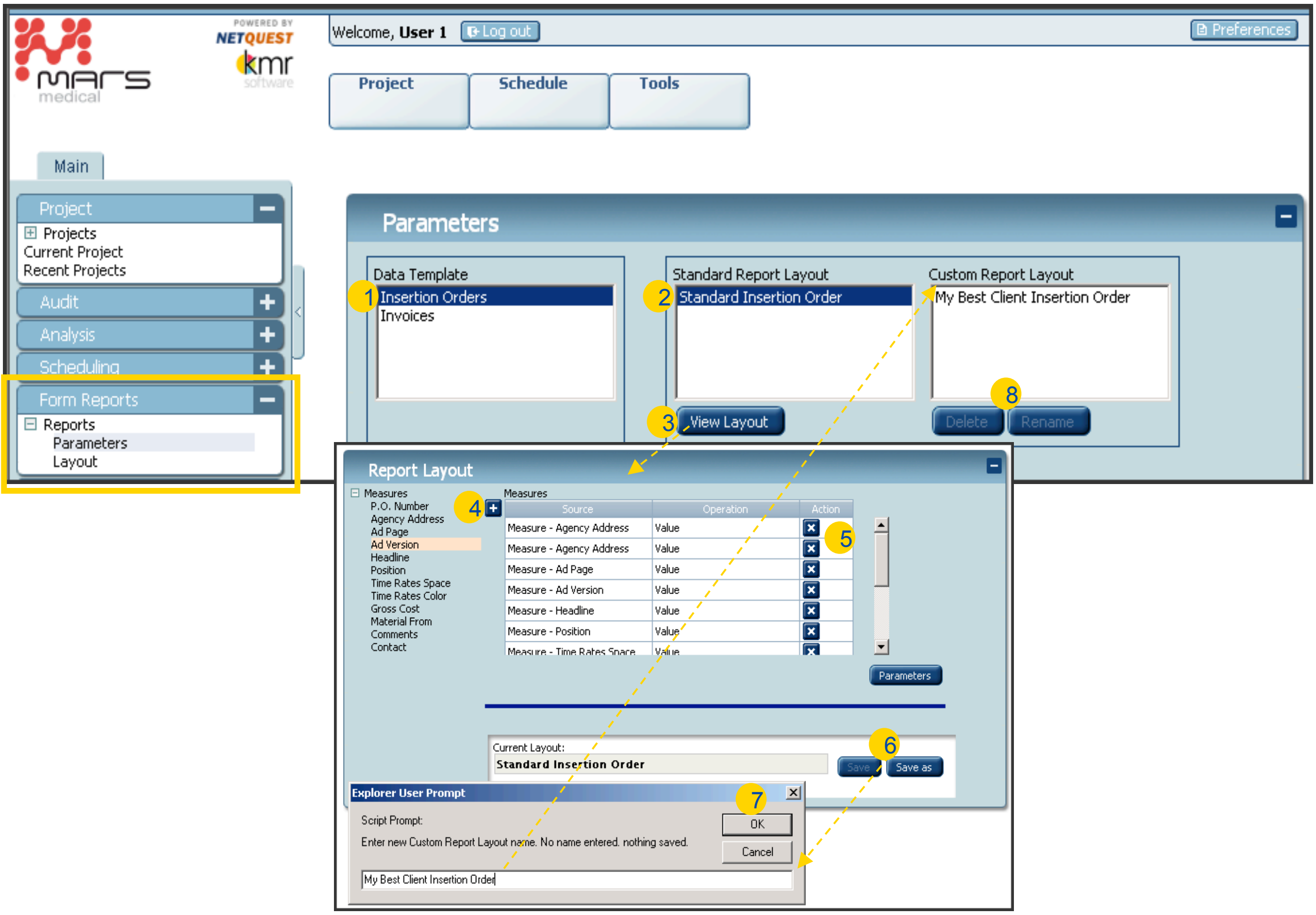
Printing & Exporting Schedule Reach and Frequency Reports

Schedule Reach and Frequency Reports can be printed and exported in the **Schedules Reports: Parameters** worksheet.

1. Select report under the **Data Template** list.
2. Select **Schedule duration** and **Data Type**
3. Click the button of the results to be received
   - **View Results:** on-screen report
   - **Print (PDF)**
   - **Export (XLS)**
   - **Export (TXT)**

Form Reports

Overview – Creating Custom Forms



Form Report Overview

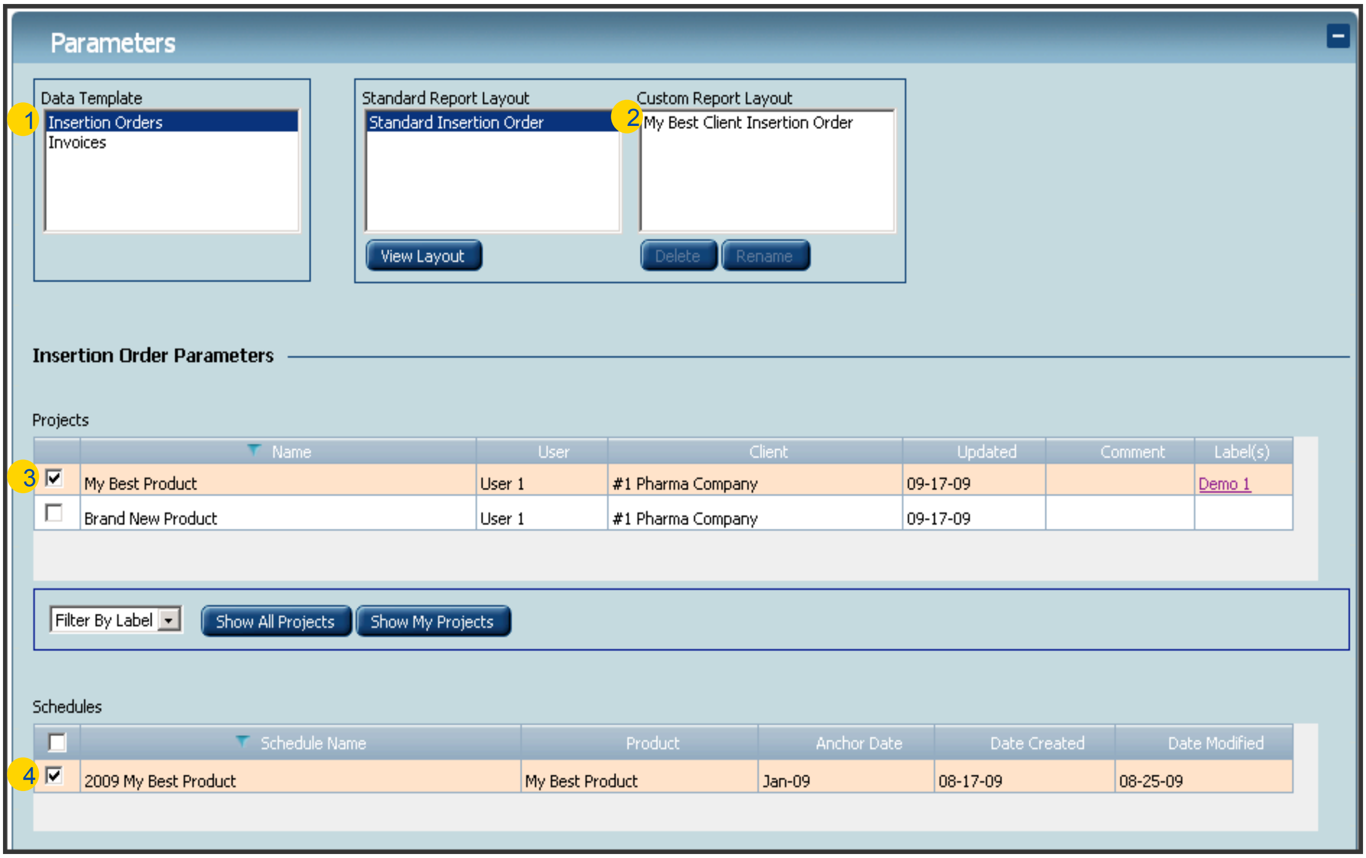
All Scheduling Form reports are generated in the **Form Reports** worksheet. The following are performed in this area:

- Define Insertion Order and Invoice report layout
- Generate/store/print, cancel, revise and reprint insertion orders
- Generate/store/print invoices
- Send insertion order transactions to accounting link files

Creating/Editing a Custom Report Layout

Customizing insertion order and invoice forms (including IO, Cancel IO, Revised IO and Reprint IO) is performed under the **Reports: Parameters** and **Layout** worksheets. Custom Report Layouts are available for all Workgroup users.

1. Under the **Data Template** list select the report type: **Insertion Orders** or **Invoices**
2. Select either a **Standard Report Layout** (create a new layout) or a **Custom Report Layout** (edit layout)
5. Click the **View Layout** button. The **Report Layout** worksheet will open.
6. To add measures, select a **Measure** and click the "**+**" button
   Note, the Standard Reports (both Invoice and Insertion Order) include all measures.
5. To delete measures, click the delete ☒ button next to the measure
6. Click the **Save As** button to save as a new custom report or **Save** to save changes to an existing report.
7. If **Save As,** enter report name in the **Explorer User Prompt** dialog and click the **OK** button.
8. The new report layout will appear under the **Custom Report Layout** list.
   To **Delete** or **Rename** a Custom Report Layout, select the report and click the appropriate button.



Generating Insertion Orders

Insertion orders can be ordered, cancelled, revised and reprinted under the **Form Reports: Report Parameter** area. You may select to use a **Standard Report Layout** or **Custom Report Layout**.

Ordering Insertions

1. Select **Insertion Orders** under the **Data Template.**
2. Select either a **Standard Report Layout** or a **Custom Report Layout.**
3. Select the **Project** where the insertion reside.
4. Select the **Schedule(s)** where the insertions reside. Click the checkbox at the top of the table to select all schedules at one time.

Tip: Sorting/Filtering Project & Schedule Lists

Use the following options to sort and filter lists.

- **Sorting Project & Schedule List:**
  Click the column labels to sort Project and Schedule lists by the selected column
- **Filtering Project List:**
  -My Project: Click button to filter list to only include your projects.
  -**Show All Projects:** Click button to display all workgroup projects.
  -**Filter by Label:** Select a Label from the dropdown menu

Form Reports

Generating Insertion Orders – Accounting Transactions

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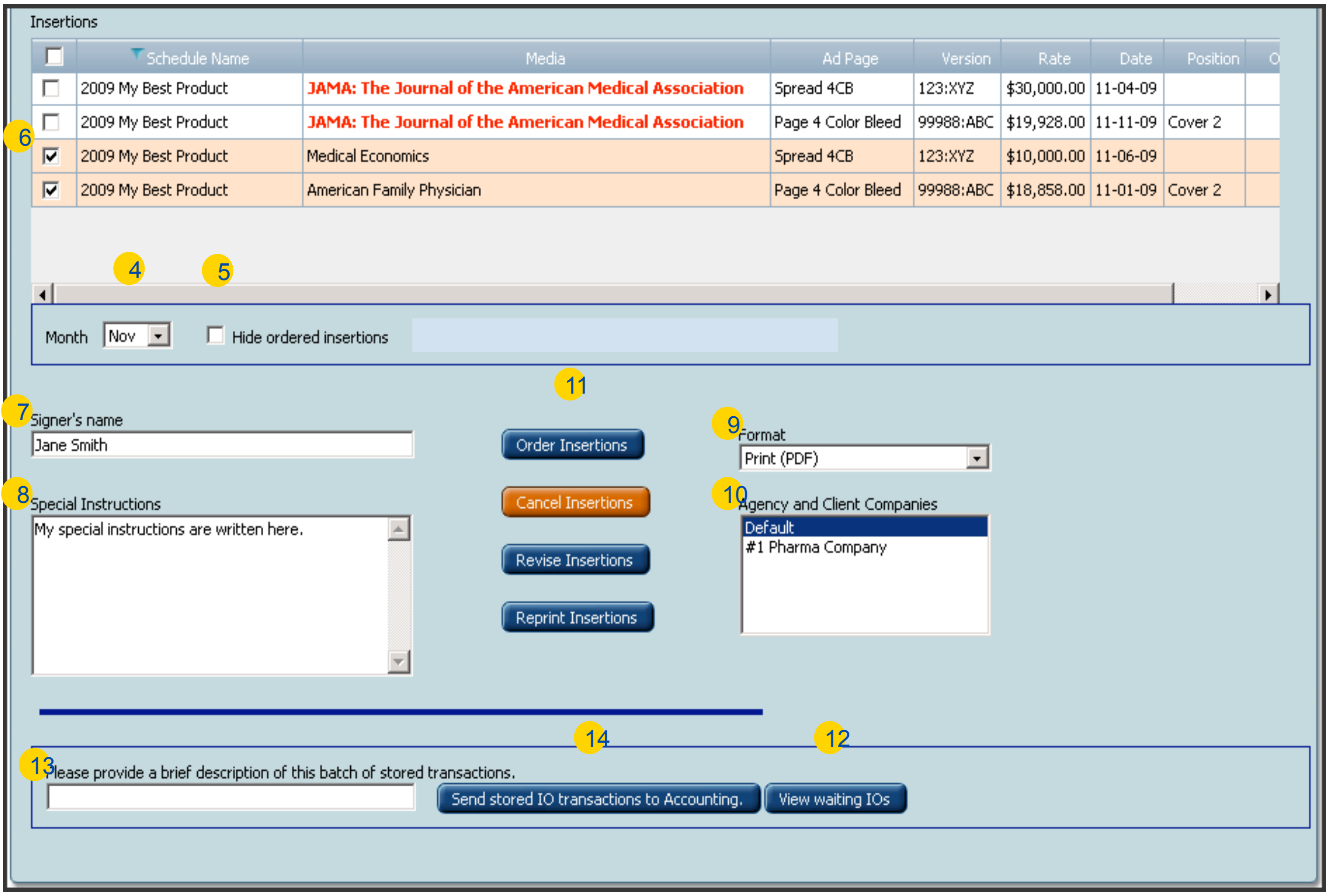


Generating Insertion Orders and Accounting Link Transactions

<u>Ordering Insertions</u>, *continued*

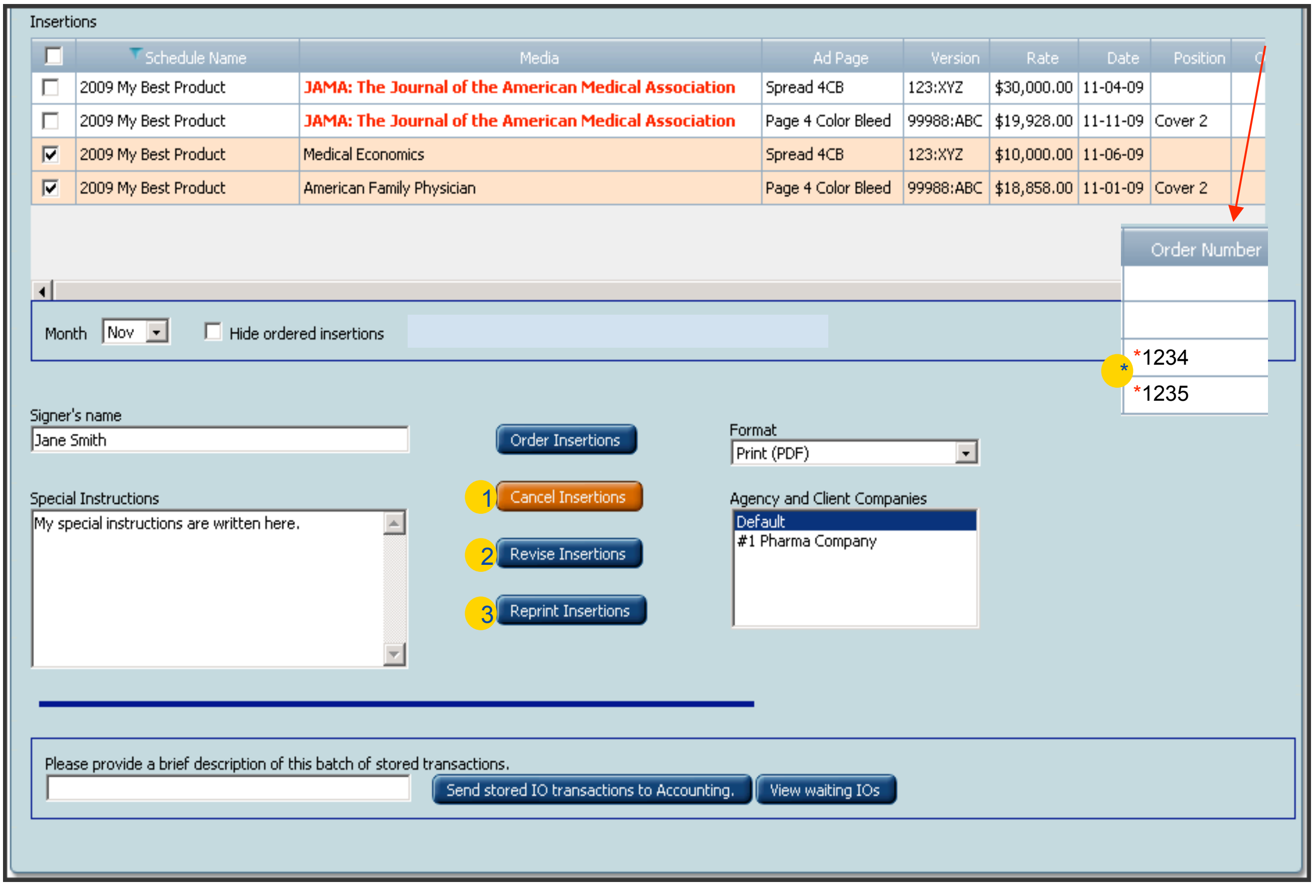
4. Select **Month** of the insertions that are to be ordered
5. Click the **Hide ordered insertions** checkbox to hide insertions that have already been ordered. Note, previously ordered insertions will have an IO number assigned under the **Insertions** grid **Order Number** column.
6. Select **Insertions** that are to be ordered.
7. Enter **Signer's name**
8. Enter **Special Instructions**
9. Select report **Format**: PDF or XLS
10. Select **Agency and Client Companies** (this will populate the return address)
11. Click the **Order Insertions** button. Upon clicking the follow occurs:
    - IO number is assigned and displayed in the **Insertions** grid under the **Order Number** column.
    - Insertion orders are generated and open in a separate window.
    - Transaction is sent to the **Accounting Link** bucket (for Accounting Link system setups only)
    - Ordered insertions are highlighted in purple on the **View/Edit Schedule: Schedule Detail** worksheet.

<u>Accounting Link</u>

Note, Media titles displayed in red indicate that the accounting link Media Code is missing and needs to be added prior to ordering insertions.

12. Click the **View waiting IOs** button to verify file transactions prior to generating.
13. Enter a file description
14. Click the **Send stored IO transactions to Accounting** button. Upon clicking an accounting link file is generated and emailed to the user's email address. The Accounting Link bucket is emptied.

Form Reports
Revising, Cancelling and Reprinting Insertion Orders



Cancelling, Revising and Reprinting Ordered Insertions

After an insertion has been ordered it can be revised/reordered, cancelled or reprinted.

Cancelling Ordered Insertions

*Follow Steps 1-10 of **Ordering Insertions***

1. Click the **Cancel Insertions** button. Upon clicking the following occurs:
   - **Order Number** under the **Insertions** grid is removed from the cancelled insertion
   - A Cancel Insertion Order is generated and opened in a separate window
   - Transaction is sent to the **Accounting Link** bucket (for Accounting Link system setups only)
   - The purple highlight is removed from the insertion on the **View/Edit Schedule: Schedule Detail** worksheet.

Revising and Reordering Ordered Insertions

*Red asterisk next to the IO number under the **Order Number** column in the **Insertions** grid indicates that revisions were made to the already ordered insertion.

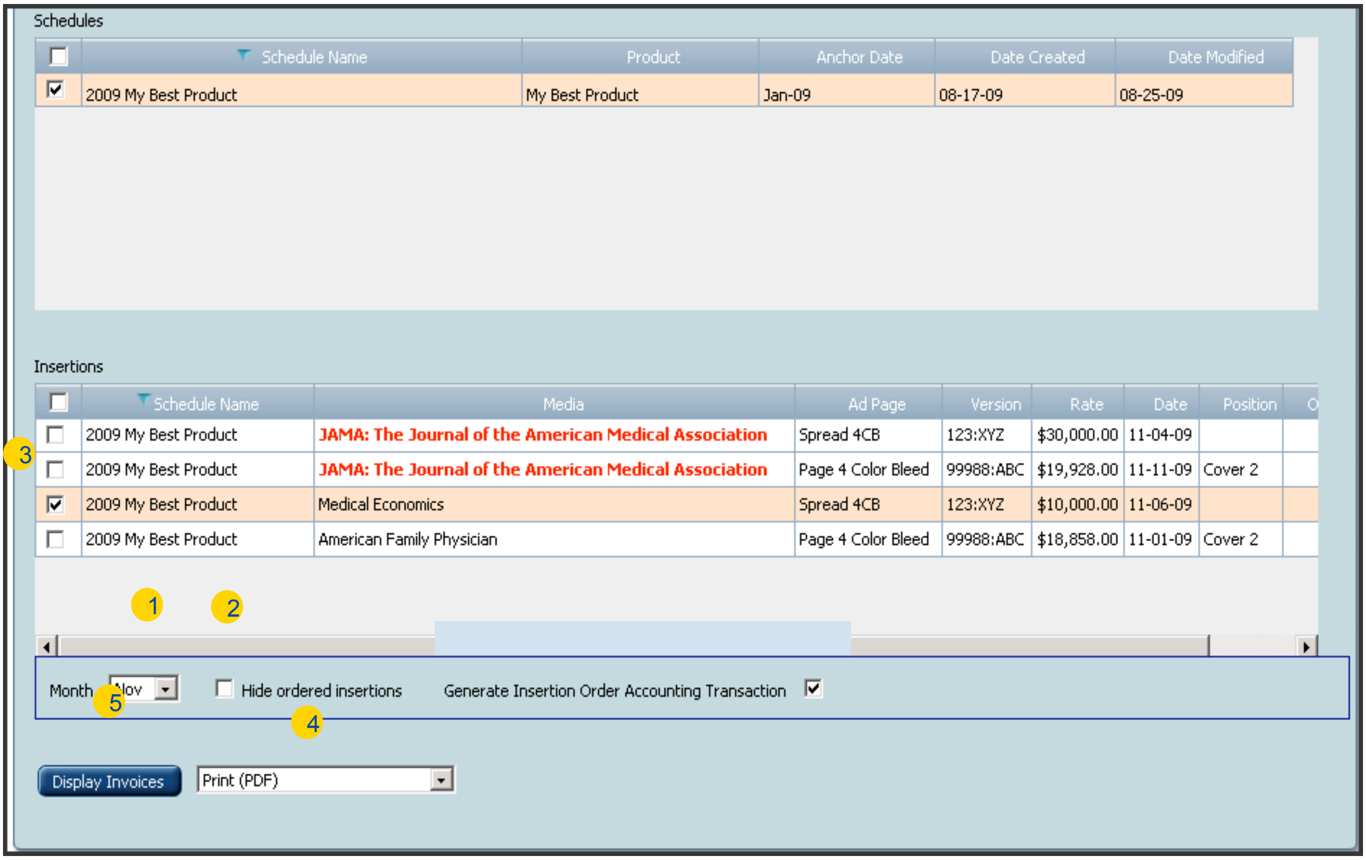
- Make the appropriate edits in the **Scheduling** area and **Save** the schedule.
- *Follow Steps 1-10 of **Ordering Insertions***

2. Click the **Revise Insertions** button. Upon clicking the follow occurs:
   - Red asterisk is removed from the revised **Order Number** under the **Insertions** grid
   - A Revised Insertion Order is generated and opened in a separate window
   - Transaction is sent to the **Accounting Link** bucket (for Accounting Link system setups only)
   - Ordered insertion remains highlighted in purple on the **View/Edit Schedule: Schedule Detail** worksheet.

Reprinting Ordered Insertions

*Follow Steps 1-10 of **Ordering Insertions***

3. Click the **Reprint Insertions** button. Upon clicking a copy of the order insertion will generate and open in a separate window. **No accounting link entries are made.**



Generating Invoices

Invoices are generated using the same method as generating Insertion Orders under the **Form Reports: Report Parameter** area. You may select to use the **Standard Report Layout** or **Custom Report Layout**.

Follow **Ordering Insertions** Steps 1-3, then:

- Select **Month** of the invoices that are to be ordered
- Click the **Hide ordered insertions** checkbox to hide insertions that have already been ordered. Note, previously ordered insertions will have an **Order Number** assigned under the **Insertions** grid.
- Select **Invoices** that are to be ordered.
- Select **Format**: PDF or XLS
- Click the **Display Invoices** button. Invoice will open in a separate window.