Budget / Clearance Management Phase 1

VP-3820 – Document v1.08

Program Changes

Database Schema

budget_clearance_management table (Phase 1A – Sprint 38)

Field Name	Type	Notes
id	int	
week	datetime	Monday of broadcast week
campaign	int	Campaign ID
budget_classification	int	See below for catalog table
campaign_budget	decimal(18,2)	Total budget for this campaign
status	int	
create_date	datetime	
create_by	int	
last_update_date	datetime	
last_update_by	int	

budget_clearance_management_buyer table (Phase 1A – Sprint 38)

Field Name	Type	Notes
id	int	
budget_clearance_management	int	
buyer	int	
buyer_budget	decimal(18,2)	
buyer_clearance_estimate	decimal(18,2)	
status	int	
create_date	datetime	
create_by	int	
last_update_date	datetime	
last_update_by	int	

Database Schema (cont.)

budget_classification catalog table (Phase 1A – Sprint 38)

Field Name	Type	Notes
id	int	
budget_classification	varchar(30)	
status	int	
create_date	datetime	
create_by	int	
last_update_date	datetime	
last_update_by	int	

budget_classification records

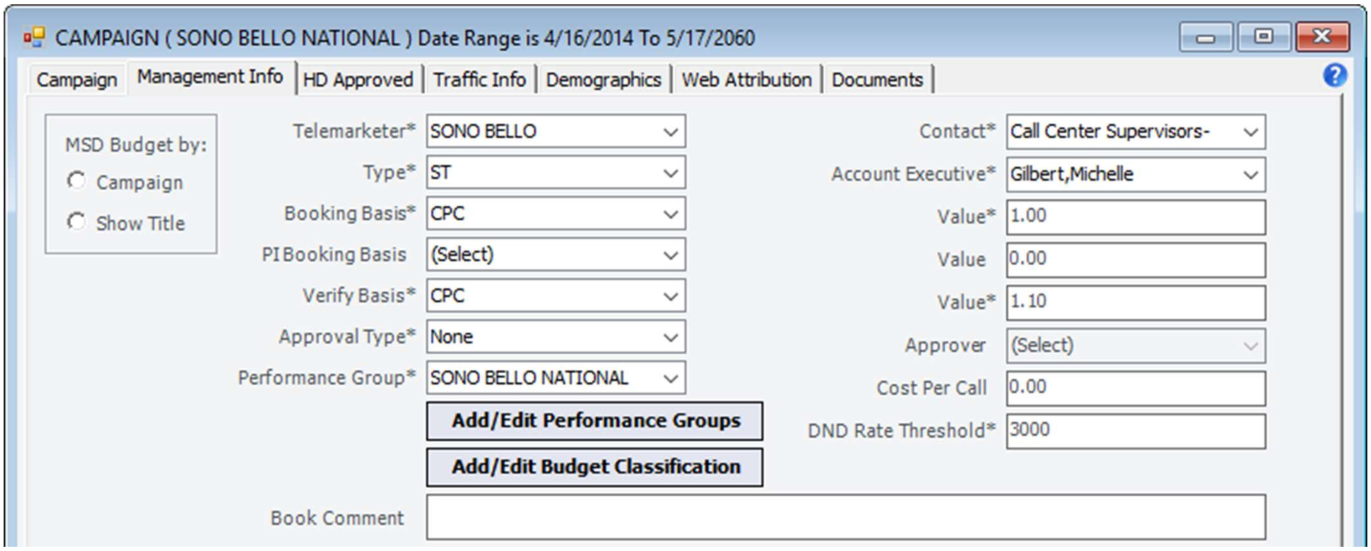
id	budget_classification	Notes
1	Performance	
2	Non-Performance	

campaign_budget_classification table (Phase 1A – Sprint 38)

Field Name	Type	Notes
id	int	
campaign	int	
budget_classification	int	
start_date	datetime	
end_date	datetime	
create_date	datetime	
create_by	int	
last_update_date	datetime	
last_update_by	int	

Campaign Form – Management Info Tab (Phase 1A – Sprint 38)

On the Management Info tab of the Campaign form, add a button for **Add/Edit Budget Classification**:

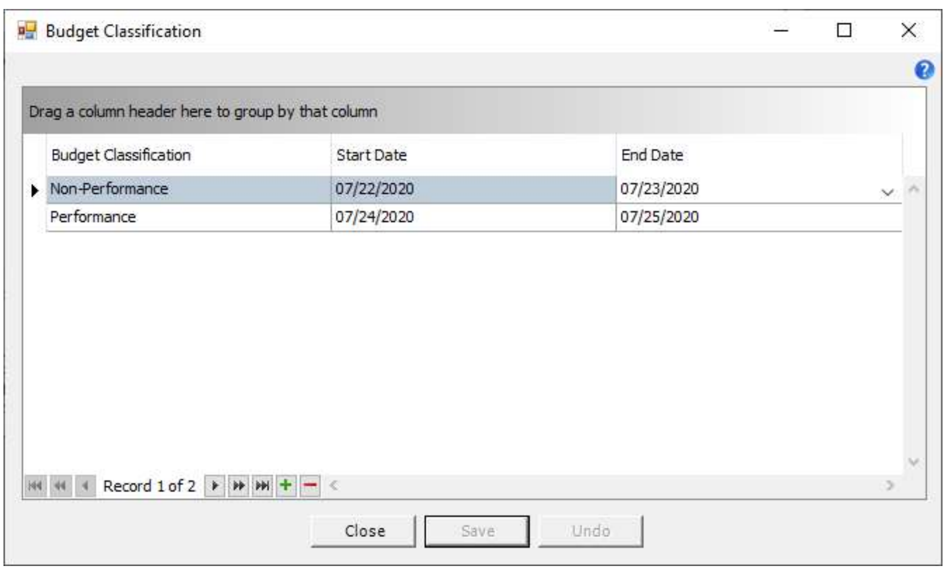


Upon adding a new Campaign, create a temporary *campaign_budget_classification* table in memory.

Upon saving the new campaign, check for a record in that table with an active date range. If none exists, display a stop message—"At least one active Budget Classification is required.” If a record exists, continue with save (causing the campaign ID to be generated), then write the data to the *campaign_budget_classification* table.

Budget Classification Form (Phase 1A – Sprint 38)

Upon clicking the **Add/Edit Budget Classification** button, open the Budget Classification form:



The **Budget Classification** column should be a dropdown that reads from the *budget_classification* table.

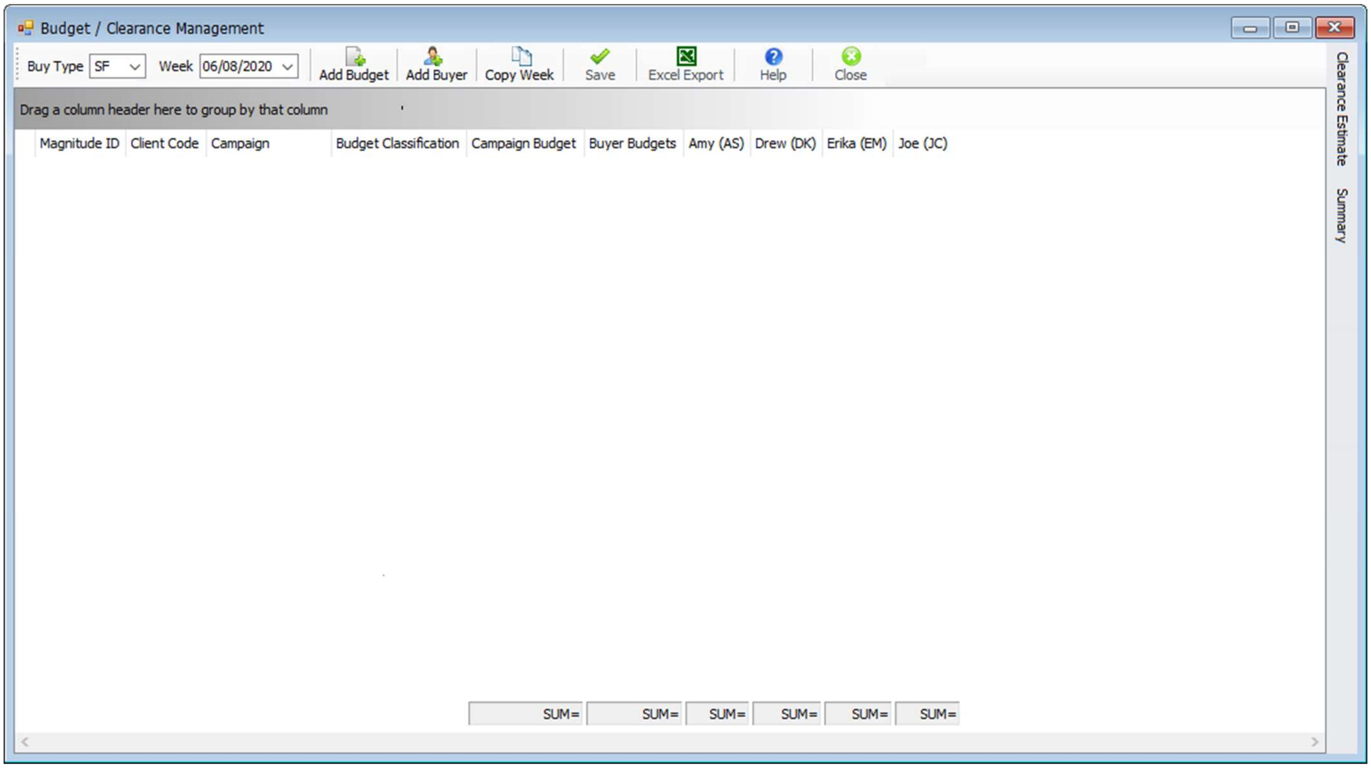
Allow deletion of newly added rows only. Allow editing all three columns for new rows, but only the **End Date** for existing rows. Upon save, validate for overlapping date ranges.

Add a ? button to the upper right of the grid, pointing to help topic ID **BudgetClassification**.

Budget / Clearance Management Form (Phase 1A – Sprint 38)

In the Main menu, add a new menu selection and form for **Budget / Clearance Management**.

Budget Grid



Add a toolbar for the main Budget grid. Make the **Add Budget**, **Add Buyer, Copy Week**, and **Save** buttons on the toolbar unavailable if the current user is not *Account Director*, *Account Executive*, *Account Manager*, *Account Supervisor*, *AE*, or *AE Custom*. Link the button to help topic ID **BudgetClearanceManagement**.

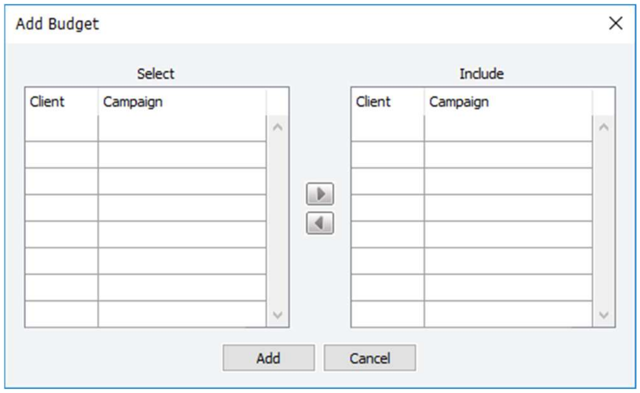
By default, populate the grid with data from the next broadcast week (which could be blank).

Budget Grid Columns

Column Label	Notes
Magnitude ID	From *client* table—read-only.
Client Code	Client ID from *campaign* table—read-only.
Campaign	Campaign from *campaign* table—read-only.
Budget Classification	From *budget_classification* table—read-only.
Campaign Budget	From the *budget_clearance_management* table, editable only by certain roles— *Account Director*, *Account Executive*, *Account Manager*, *Account Supervisor*, *AE*, and *AE Custom*.
Buyer Budgets	Calculated sum of buyer_budget fields for this campaign/week, from the *budget_clearance_management* table.
Amy (AS)	Buyer Budget—one column for each active buyer from the *budget_clearance_management_buyer* table, editable only by certain roles—*Account Director*, *Account Executive*, *Account Manager*, *Account Supervisor*, *AE*, and *AE Custom*.
Drew (DK)	
Erika (EM)	

Add Budget Form (Phase 1A – Sprint 38)

Upon clicking the **Add Budget** button, open the Add Budget form:



The **Client** and **Campaign** columns in the left grid should be dropdowns containing active clients and campaigns for the selected Buy Type and Week and which do not already exist in the budget for the week. Allow multi-select in the dropdowns, and populate the appropriate number of rows in the grid. Selecting a Client first should limit the selections in the Campaign dropdown, while selecting a Campaign first should automatically populate the Client column.

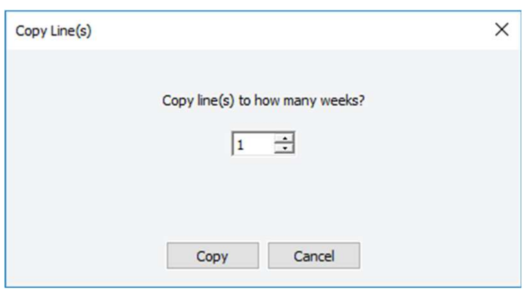
The arrow buttons should A) remove that row from the grid it is being moved from and B) copy it to the other grid.

Upon clicking the **Add** button:

1. Close the Add Budget form and return to the main form.
2. Populate the Budget grid with the selected campaigns.

Copy Line(s) Form (Phase 1A – Sprint 38)

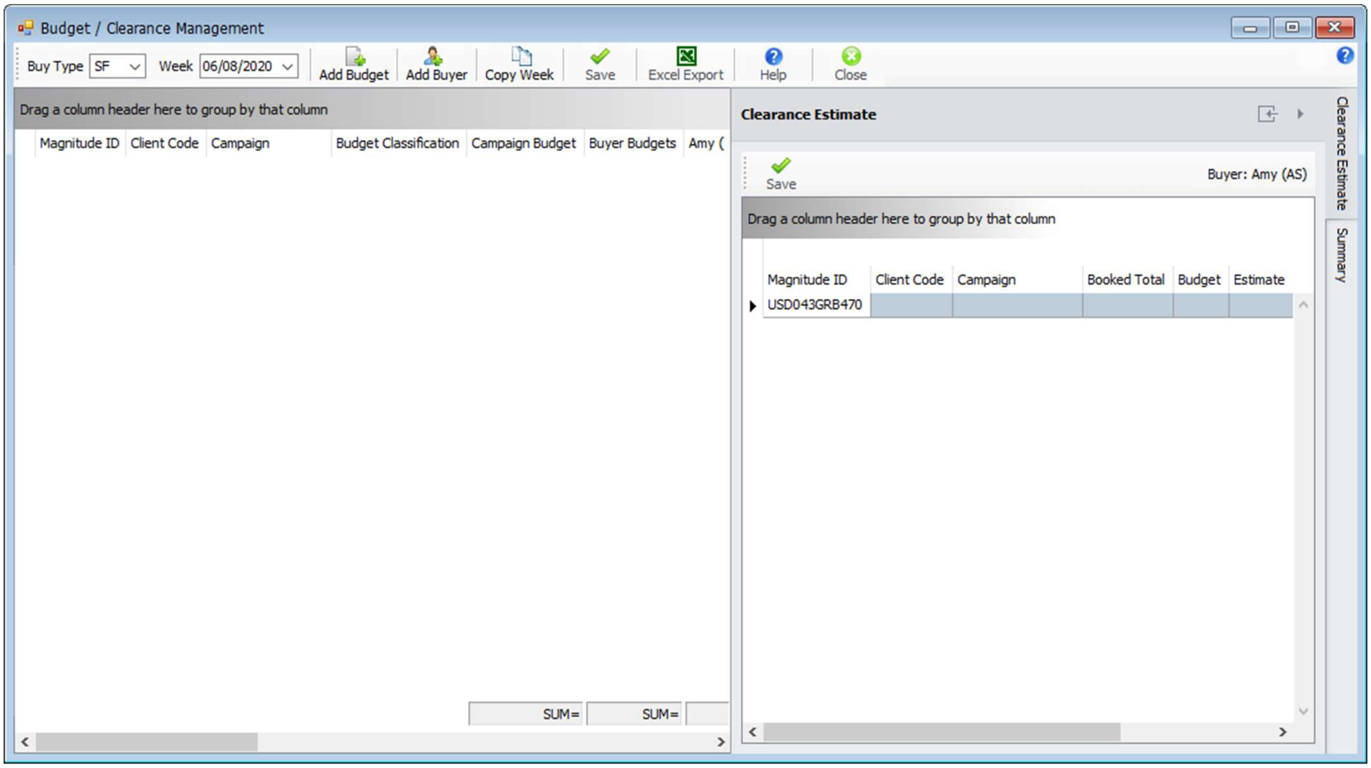
Add a right-click menu to the grid with an option for **Copy Line(s)**. Upon selecting this, open the Copy Line(s) form:



The **Copy Line(s)** function should work on the currently selected campaign (allowing multi-select) to a selected number of weeks forward. Limit the maximum number of weeks to 5. If the campaign already exists in that week, do not overwrite and do not display a warning.

Upon clicking the **Save** button of the main form, check each row to see if a buyer budget exists for at least one buyer. If so, compare the Campaign Budget to the sum of all buyer budgets for that row. If they do not match, do not allow save. If there are no buyer budgets, allow save without validation.

Clearance Estimate Pane (Phase 1B – Sprint 38)



Clearance Estimate Grid Columns

Column Label	Notes
Magnitude ID	From the *client* table—read-only.
Client Code	Client ID from the *campaign* table—read-only.
Campaign	Campaign from the *campaign* table—read-only.
Booked Total	From media—read-only.
Budget	This buyer's budget from the *budget_clearance_management_buyer* table—read-only.
Estimate	This buyer's Clearance Estimate from the *budget_clearance_management_buyer* table. Free-form entry, numbers only, editable only by the *Buyer*, that *Buyers Assistant*, *Department Director*, and *Administrator* roles.

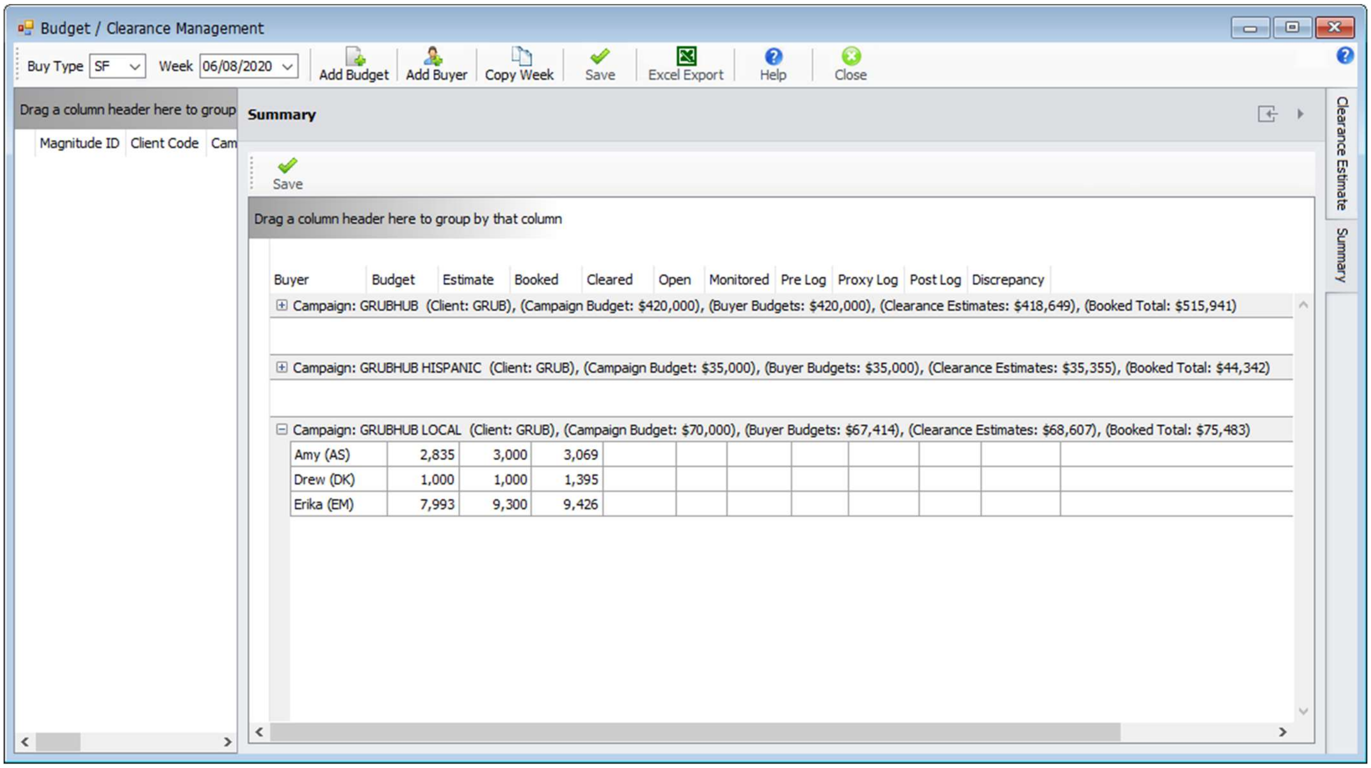
Upon initially opening the pane, IF role = *Buyer* OR *Buyers Assistant*, then default to displaying that buyer's data (if the currently logged in user is an assistant, then the buyer for whom that user is primary assistant).

Upon clicking in any buyer column in the main Budget grid, check the currently logged in user's roles:

- IF role = *Account Director*, *Account Executive*, *Account Manager*, *Account Supervisor*, *AE*, or *AE Custom*, the Clearance Estimate grid should populate with the selected buyer's data.
- IF role = *Buyer* AND role != any of the above management roles, and the selected column is not for that buyer, do nothing.
- IF role = *Buyers Assistant* AND role != any of the above management roles, AND the selected column is for one of that assistant's buyers, the Clearance Estimate grid should populate with the selected buyer's data. If the selected column is *not* for one of that assistant's buyers, do nothing.

Add a toolbar above the Clearance Estimate pane with only a **Save** button. Display the currently selected buyer's name and initials on the right side of the toolbar.

Summary Pane (Phase 1C – Sprint 39)



Summary Grid Columns

	Column Label	Notes
Group Bar	Campaign	Campaign from *campaign* table—read-only.
	Client Code	Client ID from *campaign* table—read-only.
	Campaign Budget	campaign_budget from the *budget_clearance_management* table—read only.
	Buyer Budgets	Calculated sum of buyer_budget fields for this campaign/week, from the *budget_clearance_management* table.
	Buyer Estimates	
	Booked Total	From media—read-only.
	Magnitude ID	From *client* table—read-only.
Detail Rows	Buyer	From the *budget_clearance_management_buyer* table.
	Budget	This buyer's budget from the *budget_clearance_management* table—read-only.
	Estimate	buyer_clearance_estimate from the *budget_clearance_management_buyer* table. Free-form entry, numbers only, editable only by the *Buyer*, that *Buyers Assistant*, *Department Director*, and *Administrator* roles.
	Booked	Total booked by this buyer for this campaign/week.
	Cleared	From media—Monitored + Pre Log + Proxy Log + Post Log + Discrepancy = Cleared
	Open	From media—no air date or time.
	Monitored	Total CNET amount from MODs of E-Type = *Monitored*
	Pre Log	Total CNET amount from MODs of E-Type = *Pre Log*
	Proxy Log	Total CNET amount from MODs of E-Type = *Proxy Log*
	Post Log	Total CNET amount from MODs of E-Type = *Post Log*
	Discrepancy	Total CNET amount from MODs of E-Type = *Discrepancy*