

## Product Administration

### Service Management

You can check the status of the main Budget Control service from the **Manage Service** web page. Restarting the service is only required when you enter a new license string.

### Manage Budgets

From this web page you can add, edit or delete budget assignments. To locate existing budgets you can filter the grid results or click the columns headers to sort the list.

Cumulative budgets can be detailed by clicking the department or cost center name. This way you'll be able to check if the ip phone associated to the user can be monitored by Phone Lock, and its lock status.

+ Assign new budget Refresh

| ENABLED                             | COST CENTER | ASSIGNED TO               | TYPE     | BUDGET              | TOTAL BUDGET      | TOTAL CURRENT | TELEPHONE STATE |
|-------------------------------------|-------------|---------------------------|----------|---------------------|-------------------|---------------|-----------------|
| <input type="checkbox"/>            | sales       | 1                         | all      |                     | 1                 | 1             | All             |
| ▼ Budget for User                   |             |                           |          |                     |                   |               |                 |
| <input checked="" type="checkbox"/> | sales       | Massimiliano Picchi (211) | personal | Euro 500.00         | Euro 500.00       | Euro 0.99     |                 |
| <input checked="" type="checkbox"/> | sales       | Massimiliano Prando (205) | personal | Euro 100.00         | Euro 100.00       | Euro 0.00     |                 |
| <input checked="" type="checkbox"/> | sales       | Yury Montagnani (213)     | personal | Euro 300.00         | Euro 300.00       | Euro 7.10     | Unlocked        |
| <input checked="" type="checkbox"/> | sales       | Andrea Sonnino (731)      | personal | Euro 100.00         | Euro 100.00       | Euro 2.00     | Unlocked        |
| <b>Tot:</b>                         |             |                           |          | <b>Euro 1000.00</b> | <b>Euro 10.09</b> |               |                 |

To assign a new budget, you must compress the list again and press the link on the top of the list.

**Budget for**

Department  Exceptions...

**Budget type**

Cumulative budget for the Department i

Personal budget for each user of the Department i

**Budget (Monthly)**

1000 Euro

**Historical data** Calculate

| Year | Month | Users | Total avg. cost | Total cost | Total budget | Saving | %     |
|------|-------|-------|-----------------|------------|--------------|--------|-------|
| 2012 | 10    | 10    | 1.76            | 17.63      | 0.00         | 0.00   | 0.0 % |
| 2012 | 5     | 1     | 0.00            | 0.00       | 0.00         | 0.00   | 0.0 % |
| 2012 | 4     | 13    | 7.35            | 95.60      | 0.00         | 0.00   | 0.0 % |
| 2012 | 3     | 15    | 17.12           | 256.76     | 0.00         | 0.00   | 0.0 % |
| 2012 | 2     | 12    | 4.48            | 53.78      | 0.00         | 0.00   | 0.0 % |
| 2012 | 1     | 15    | 6.51            | 97.63      | 0.00         | 0.00   | 0.0 % |
| 2011 | 12    | 15    | 13.29           | 199.28     | 0.00         | 0.00   | 0.0 % |
| 2011 | 11    | 15    | 9.16            | 137.41     | 0.00         | 0.00   | 0.0 % |

# imagicle

You can exclude users from the group pressing the **Exceptions** button.

The screenshot shows a web interface for budget configuration. At the top, there are fields for "Budget for" (set to "Department") and "Budget type" (with "Cumulative budget for the Department" selected). Below this, the "Department" is set to "imagicle.com". A red circle highlights the "Exceptions..." button. A table lists users with columns for "Full Name", "User name", and "Extension". A dropdown menu is open over the table, showing filter options: "No Filters", "Contains", "Does Not Contain", "Starts With", and "Equal To". At the bottom left, a red circle highlights the text "Users excluded: 0/33". Buttons for "Save", "Cancel", "OK", and "Cancel" are visible.

| Full Name  | User name            | Extension |
|--|----------------------|-----------|
| John   |                      |           |
| <input checked="" type="checkbox"/> Aldo Antignano     |                      | 26        |
| <input checked="" type="checkbox"/> Andrea Sonnino     |                      | 31        |
| <input checked="" type="checkbox"/> Andrea Valleriani  |                      | 2         |
| <input checked="" type="checkbox"/> Bernardo Federigi  |                      | 5         |
| <input checked="" type="checkbox"/> Christopher Morris | christopher_morris_i | 734       |
| <input checked="" type="checkbox"/> Cinzia Micco       | cinzia_micco_imagicl | 721       |
| <input checked="" type="checkbox"/> Cristian Delu      | cristian_delu_imagic | 730       |

To be able to assign a budget to a user included in a department or cost center, you must first exclude him/her from the budget assigned to the group.

## Notifications associated to the budget

On the **Budgets Notifications** tab you can override the default behaviour associated to a specific budget. You can also add an additional email recipient for the email alerts.

Additional Recipient

### Email Notifications

- send email on budget reached i
- send email on  of budget reached i
- send email on budget assigning i
- send summary email at end of the period i
- Phone locking failure i

## Notification Templates

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To change the email body contents for all the users, please access to Imagicle server's file system through a Remote Desktop session and locate the following folders:

```
C:\Program Files (x86)\StonevoiceAS\Apps\BudgetControl\Locale\XX\
```

Where XX is the language code for the users language: **en, it, fr, es, ar, de**

Inside each language folder, you can find a file called **User.mails.template.txt** This file include all possible types of notification messages which can be sent to users.

The template can be customized, keeping in mind that it includes some tags which are set depending on current budget status. Each tag is delimited by question marks, like: ?BudgetValue?, ?BudgetPeriod?, etc.

## Phone locking associated to a specific budget

On the third tab you can decided whether to lock all the ip phones associated to a budget when it is overcome, and whether to unlock them at the end of the budget period.

This page is also locked to troubleshoot the phone locking issues, because it shows a list of the phones linked to the budget which **cannot** be locked by Phone Lock, if any. If everything is ok, the list is empty. To see the list, press the *Refresh* link.

Phones can be automatically locked when budget is reached (StoneLock is required to perform the lock).

lock phone when budget is reached 

unlock phone on period change or budget reallocation 

### Phones not controlled by Stonelock

|     |   |  |
|-----|---|--|
| 726 |  | The phones listed are not controlled by StoneLock and cannot be locked. Please check StoneLock configuration to include these phones if you need the locking features. |
| 731 |   |  |
| 212 |   |  |
| 215 |   |  |
| 722 |   |  |

[Refresh](#)

**Note:** please check the phone locking options requirements in the Preliminary check list and in the Product Configuration chapter.

**Note:** to unlock a locked phone after the budget has been overcome, use this mask. Edit the budget the user is assigned to and uncheck the "lock phone" checkbox.

## Reports

Example of available reports:

- **Trend Analysis by Week:** Shows the trend of total budget, cost and saving week by week
- **Trend Analysis by Month:** Shows the trend of total budget, cost and saving month by month
- **Organization Analysis:** Shows budget, cost and saving for the entire organization
- **User with personal budget Analysis:** Shows budget, cost and saving for each user with a personal budget

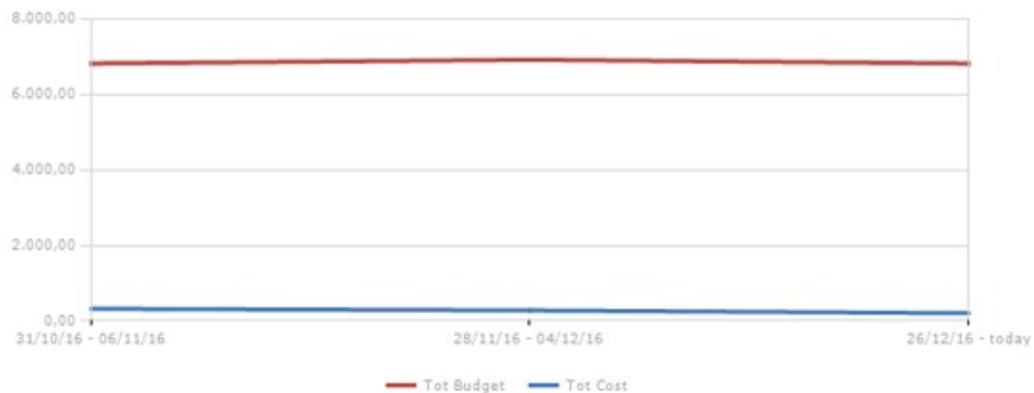
Various options allow you to filter data by period, group or single user depending on the selected report.

You can press the Save button to add the report to a personal report list for later use, or you can export it in PDF or Excel format.

## Trend Analysis by Week

Last 3 months (01/10/16 - 30/12/16)

|  |                                   |                              |                                   |
|--|-----------------------------------|------------------------------|-----------------------------------|
| <br>Cost 4,0% | <b>19.718,54</b><br>Saving (Euro) | <b>818,36</b><br>Cost (Euro) | <b>20.536,90</b><br>Budget (Euro) |
|--|-----------------------------------|------------------------------|-----------------------------------|



| Week no.     | Period              | Budget (Euro)    | Cost (Euro)   | Saving (Euro)    | Saving %   | Assigned to Avg Personal users | Cost (Euro) |
|--------------|---------------------|------------------|---------------|------------------|------------|--------------------------------|-------------|
| 53           | 26/12/16 - today    | 6.812,30         | 209,42        | 6.602,88         | 97%        | 15                             | 6,54        |
| 49           | 28/11/16 - 04/12/16 | 6.912,30         | 283,64        | 6.628,66         | 96%        | 14                             | 6,30        |
| 45           | 31/10/16 - 06/11/16 | 6.812,30         | 325,29        | 6.487,01         | 95%        | 14                             | 10,49       |
| <b>Total</b> |                     | <b>20.536,90</b> | <b>818,36</b> | <b>19.718,54</b> | <b>96%</b> |                                |             |



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Data updated to 30/12/2016 15.11

### My Budgets

This web page can only be accessed by users. Here they can see the budget assigned to them and check the remaining budget.

They can also see the list of the events related to their budget.

### Questions and Answers (Q&A)

**Q:** What happens if I change an existing budget amount?

**A:** The new value applies immediately, possibly locking phones with an expense over the new budget threshold.

**Q:** What happens if a user subjected to a group (department/cost center) cumulative budget is moved to another group (department/cost center)?

**A:** Calls previously done will be counted in the previous budget (there are no impacts on the previous budget). New calls will be subjected to the new budget, if any.

**Q:** What happens if a user subjected to an individual budget per group (department/cost center) is moved to another group (department/cost center)?

**A:** The budget related to the old department will exist and apply until the end of the budget period (normally until the end of the month). If the phone was already locked for budget reasons, the phone remains locked until the budget renewal date (regardless the fact the user is subjected to a new budget). In order to unlock his/her phone, you need to edit the previous budget and exclude the user from the budget (using the "Exceptions" panel).

## imagicle

If a budget is defined for the new department/cost center, the new budget applies immediately to the new calls.