

# Product Configuration

## Product Configuration Task List

Before assigning new budgets to the configured users, you should complete the following steps.

- Choose the budget assignment method and period
- Select or deselect Budget Accumulation
- Setup the Budget Manager notifications
- Create a list of phone lines which will not be blocked when the budget is reached
- Activate the license or check that the evaluation period is not expired

### Budget assignment method and period

To be able to use Budget Control effectively, you must make some preliminary choices on how to use the product. The budget assignment method and the budget period length **must be decided in advance**.

You can set those parameters in the **Global Settings** web page.

Budget Control relies on the cost calculation and allocation performed by Billy Blue's, that is required to run the service.

#### DISCLAIMER

Budget Control cost calculation is based on Pbx CDR documentation, that is generated at the end of each call.

For this reason Budget Control cannot interrupt the call that causes the budget reaching, but only subsequent calls.

#### Budget assignment method

- assign budget to users
- assign budget to cost centers and users
- assign budget to departments and users

#### Budget period

- monthly Start from day
- weekly Start from

#### Budget accumulation

Accumulate remaining budget ad period change

Budget Control can check the expenses of single users or group of users.

1. If a budget is assigned to a group of users (Cost centre or Department), the current expense will be the sum of the money spent by the users belonging to the group. The notifications will be triggered comparing the sum of the expense with the budget assigned to the group.
2. If a budget is assigned to single users, the Budget Control service will just check the sum of the costs divided by user.
3. A third way of assigning a budget is to reserve an amount of money to each user of a Department or Cost centre. This is just a convenient way to assign the same budget to many users.

In the first case, select "Assign budget to cost centers and users" or "Assign budget to departments and users". Go to the **Manage Budgets** web page, press **Assign new budget**. Under *Budget For* select Department (or Cost Center), under *Budget type* select the "Cumulative budget" option.

**Budget for**  
 Cost Center ▼ ⓘ

**Cost Center**  
 Massarosa ▼ Exceptions...

**Budget type**  
 Cumulative budget for the Cost Center ⓘ  
 Personal budget for each user of the Cost Center ⓘ

**Budget (Weekly)**  
 1000 Euro ▼

In the second case, under *Budget For* select **User** and choose him or her by pressing the button with the three dots.

**Budget for**  
 User ▼ ⓘ

**User**  
 User2 ...

In the third case, under *Budget For* choose a department or cost center and under *Budget type* select "Personal budget for each user".

Please remember to save your settings when you make changes.

**Budget for**  
 Department ▼ ⓘ

**Department**  
 imagicle.com ▼ Exceptions...

**Budget type**  
 Cumulative budget for the Department ⓘ  
 Personal budget for each user of the Department ⓘ

**Budget (Weekly)**  
 100 Euro ▼

**Warning:** The budget computation can only be made when the PBX sends the CDR to Imagicle Call Analytics, that is, when a call is finished. You cannot know how long a call will last in advance. For this reason, budget overcoming events can only be triggered when the call which makes the expense go beyond the budget is finished.

### Groups of Users vs Single User Budget

Budget Control allows you to group users either by Cost Center or Department, but not both. To group the users, just fill the Cost Center or Department field in their user profile properties (Main -> **User Management**). If you change the Budget assignment method later, the budget assignment will be reset.

**Warning, if you change the assignment method every Department budget will be deleted. Are you sure?**

You cannot assign a budget to a user twice. If a user belongs to a group (Department or Cost Center), his or her expenses can be only be cumulated to the group expenses, and cannot be checked separately.

For this reason, you can exclude some users from a department or cost center when you assign the budget. This way you'll be able to monitor the users separately, if you want.

The screenshot shows the 'Budget for' section with 'Department' set to 'imagicle.com'. The 'Budget type' is set to 'Cumulative budget for the Department'. The 'Budget (Weekly)' dropdown is visible. A dialog box is open showing a table of users with a filter menu applied to the 'Full Name' column. The filter menu options are 'No Filters', 'Contains', 'Does Not Contain', 'Starts With', and 'Equal To'. The 'Starts With' option is selected. The table lists users with their full names, user names, and extensions. At the bottom of the dialog, it says 'Users excluded: 0/33'.

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_j	734
<input checked="" type="checkbox"/> Cinzia Micco	cinzia_micco_imagicl	721
<input checked="" type="checkbox"/> Cristian Delu	cristian_delu_imagic	730

### Budget Period and Budget Accumulation

The budget allocation duration must be decided in advance too. If you change it later, the assigned budgets will be deleted.

**Warning, if you change the period from monthly to weekly, every monthly budget will be deleted. Are you sure?**

From the Global Setting page you can also choose to cumulate the remainder of the budget at the end of a time interval (week or month) with the expense allowed for the next time interval.

**Note:** to be able to edit the beginning of the period you must press the **Save** button first.

### Calculate Historical Data

The best way to choose the amount of the budget to be reserved to the user or group of users is to select it in the **Assign new budget** form and press the "Calculate" link to consult the historical data.

**Note:** On new Budget Control installations, the total budget column will show only zeroes. The column will be filled when historical data on budgets will be available.

## 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 %

## Notifications

From the *budget notifications* tab you can choose whether to send email alerts when specific events occur. You can only specify one email recipient as budget manager. Detailed notifications can be enabled to individual users when adding a new budget assignment.

### Budget Manager e-mail

### System Administrator e-mail

### Email notifications

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

	Budget Manager	System Administrator	User
<input checked="" type="checkbox"/> send email on budget reached	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> send email on <input type="text" value="80%"/> of budget reached	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> send email on budget assigning	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> send summary email at end of the period	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> send email on phone locking failure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Global phone locking options - list of exclusions

From the Phone Locking tab in the Global settings page you can exclude specific numbers or range of numbers from the phone lock feature.

**Note:** These exclusions are not related to Phone Lock exclusions. If a phone has been locked by the user or by the administrator through Phone Lock, Budget Control won't be able to unlock it.

You can enter one entry for each row. You can use the character "!" to permit any sequence of digits (i.e. 9! for any number starting with 9). You can use the character "." to permit any single digit (i.e. 90.. for any 4 digit number starting with 90).

# imagicle

## List of allowed numbers when phones are locked



To enable the phone locking feature:

- Phone Lock is licensed and the license covers all the monitored extensions
- Phone Lock is not working in the old per-device mode. If so, you'll receive the following warning. Please switch to the new per-line mode on Phone Lock **Manage Service** web page.

**StoneLock is running in old-version mode.**

- The extensions can be monitored by Phone Lock. You can check that by clicking the **refresh** link. If the some extension is not monitored, you can troubleshoot the issue through the **Support** and **Detected Phones and Devices** web pages.
- If you are leveraging FAC (Forced Authorization Codes) or CMC (Client Matter Codes) to initiate an outbound call, **please do not enable Phone Lock feature**. Phone Lock operates at phone device or line level, so other phone devices/lines can still initiate outbound calls using FAC/CMC code of a blocked user.

## User Permissions

You can change user permissions associated to Budget Control through the **Main -> User Management** web page as usual.

The following specific permissions apply:

- **View own budget.** This is the default for the users. They can login through the web interface and consult their remaining budget(s).
- **Manage own department/cost center budget.** Users who have this level can assign new budgets to other users belonging to their department or cost center. When accessing the Manage Budgets and Assign new budget page, the list of users they'll be able to see will be automatically filtered. Please make sure the users with this access level have a Cost center or Department assigned to them