

# EXT: budmgr

Extension Key: **budmgr**

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## Introduction

Budmgr (budget manager) is an extension to manage budgets of departments and costcenters. It shows the budgets divided in quarters of a year for the whole enterprise, every costcenter and every department separately. Therefore you get an overview of the total budget of the enterprise. You can enable a "show contact" field in flexform setup, if the budgets are accommodated with reached contacts.

### What's new?

This is the first public release.

### What does it do?

The extension allows you to inset planned budgets which are related to the website users department and to a chosen costcenter. The FE user table is modified, so every frontend user can be assigned to a department. When this user shows the budget input page the department is set automatically. Here the user can create a new budget for his department and a costcenter. In the budget completion view, this user sees only the open budget of his department. After the completion of the budget ( input the desired amount in the credit field, and the number of reached contacts) the budget is accumulated in the budget year view. Without completion of the budget, the budget isn't show in the budget year view.

### Sponsored by

**major-sponsor:** heysemedia - Thomas Heyse, <http://www.heyse.de/>

**others:**

## Screenshots

### The budget view

2005 2006 **2007** 2008 2009

**Marketing Budget Plan 2007**

	Quartal I				Quartal II				Quartal III			
	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz
<b>Budget gesamt</b>	3850	7.949,80	1.209,40	6.740,40	0	100,00	0,00	100,00				
Unternehmen	Quartal I				Quartal II				Quartal III			
	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz
Online	500	6.699,80	99,40	6.600,40	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Werbeaussendungen	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Werbematerial	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Druckmaterial	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Sponsoring	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Messen	0	0,00	0,00	0,00	0	100,00	0,00	100,00	0	0,00	0,00	0,00
Events	350	700,00	560,00	140,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Anzeigen	3000	550,00	550,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Beratung	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Sonstiges	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
<b>Budget gesamt</b>	3850	7.949,80	1.209,40	6.740,40	0	100,00	0,00	100,00				
Geschäftsleitung	Quartal I				Quartal II				Quartal III			
	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz
Online	500	6.699,80	99,40	6.600,40	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Werbeaussendungen	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Werbematerial	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Druckmaterial	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00

### The budget input mask

2006 **2007** 2008

**Budget erfassen**

Abteilung: Geschäftsleitung  
 Quartal: I  
 Kostenstelle: Online

Arbeiten: Quelle (Re.-Nr.)  
 SOLL

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**Vorhandene Budgets: Geschäftsleitung**

Quartal	Quelle (Re.-Nr.)	Datum	Arbeiten	Kostenstelle	Status	SOLL	IST
I	Re 00307	01.08.2007	Onlinewerbung Google	Online	geschlossen	33,80	24,40
I	Verlag 009	03.08.2007	An 007	Anzeigen	geschlossen	550,00	550,00
I	bbbb	03.08.2007	www	Online	geschlossen	6666,00	75,00
I	Groß	07.08.2007	große zahl	Sponsoring	offen	100000,00	101000,00
I	yyyyyyyyy	11.08.2007	xxxxxxxxxxx	Events	geschlossen	700,00	560,00
II	w3	05.08.2007	werben	Werbematerial	offen	400,00	1000,00

The budget completion mask

2006 **2007** 2008

Offene Budgets: Geschäftsleitung

Quartal	Quelle (Re.-Nr.)	Datum	Arbeiten	Kostenstelle	SOLL	IST	Kontakte	
I	Groß	07.08.2007	große zahl	Sponsoring	100000.00	101000.00	0	Speichern
II	w3	05.08.2007	werben	Werbematerial	400.00	1000.00	0	Speichern
II	www	07.08.2007	cccc	Sponsoring	670.00	0.00	0	Speichern
III	Burda 001	03.08.2007	Und im 3.	Online	450.00	400.00	0	Speichern
III	bbbbbbbbbbbb	07.08.2007	aaaaaaaaaaaa	Online	300.00	0.00	0	Speichern

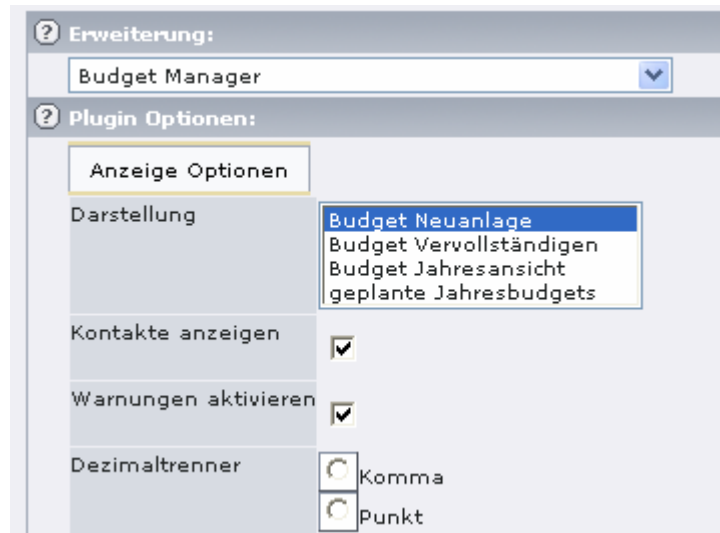
# Installation

Install the extension just like any other extension from the TYPO3 extension repository. Because the website users need a new field department, this table will be modified during installation.

1. Create a page where you want to insert budgets.
2. Create a page where you want to complete the previously inserted budgets.
3. Create a page where you want to show the budget of a year.
4. Optional create a page to show the planned budgets of a year.



In the page setup hide these pages to normal users and set the access right to users which belongs to an department. Insert the plugin to all 4 pages with the right view.



If you want to use the “reached contacts” field enable this. You can also choose the correct decimal separator.

After you have done this, you have to insert your departments and your costcenters with the TYPO3 list module.

I, for example, store the departments in the page “Budget”. It is important to set the correct starting point in all 4 plugins you inserted above, so the plugins are able to find the data.

After all is done, you have to assign the department users the correct department they belong to.

The pages “Budget” and “Budget komplettieren” are only shown to users which belong to an department. If they didn't, you get an error message like this:

budmgr admin message: You entered this page without a valid department, maybe you are not logged in correctly to the frontend

To assign a department to a website user, go to the folder where you store your website users and use the list module of TYPO3 to edit the users attributes. You'll find the department at the end of the attributes.

**Abteilung**

Geschäftsleitung  
 Tank & Technik, Tankreinigung  
 Tankschutz / Revision, Neuanla...  
 Tankdemontage, Stilllegung

**Allgemeine Optionen:**

Inaktiv:  ? Start:    ? Stop:    ?

After you have set all users correctly, you are ready to go....

## Inserting new budget

A logged in FE user who is assigned a department can now insert a new budget entry. Therefore, go to the page 'Budget Neuanlage' and insert the data.

2006 **2007** 2008

**Budget erfassen**

Abteilung: Geschäftsleitung  
 Quartal: I  
 Kostenstelle: Online  
 Arbeiten:  Quelle (Re.-Nr.):  SOLL:

**Vorhandene Budgets: Geschäftsleitung**

Quartal	Quelle (Re.-Nr.)	Datum	Arbeiten	Kostenstelle	Status	SOLL	IST
I	Re 00307	01.08.2007	Onlinewerbung Google	Online	geschlossen	33.80	24.40
I	Verlag 009	03.08.2007	An 007	Anzeigen	geschlossen	550.00	550.00
I	bbbb	03.08.2007	www	Online	geschlossen	6666.00	75.00

In the above picture you see the existing budgets of department 'Geschäftsleitung'.

After storing the record, the budget has the status 'open' and can be seen in the page 'Budget komplettieren'.

**Offene Budgets: Geschäftsleitung**

Quartal	Quelle (Re.-Nr.)	Datum	Arbeiten	Kostenstelle	SOLL	IST	Kontakte	
I	Groß	07.08.2007	große zahl	Sponsoring	100000.00	101000.00	0	Speichern
I	tttttt	18.08.2007	ggggg	Online	400.00	0.00	0	Speichern
I	RE3009	01.02.2008	Reinigung Tankanlage	Online	4000.00	3550	1	Speichern
II	www	07.08.2007	cccc	Sponsoring	670.00	0.00	0	Speichern
III	bbbbbbbbbbbb	07.08.2007	aaaaaaaaaaaa	Online	300.00	0.00	0	Speichern

Now you can complete the 'Ist'- and the 'Kontakte'-field and store the budget. In our example Ist = 3550 and Kontakte = 1. After saving the data record, the budget gets the status 'geschlossen'.

Now you see the closed budget in the page where the view 'Budget Input' is located.

**Vorhandene Budgets: Geschäftsleitung**

Quartal	Quelle (Re.-Nr.)	Datum	Arbeiten	Kostenstelle	Status	SOLL	IST
I	Re 00307	01.08.2007	Onlinewerbung Google	Online	geschlossen	33.80	24.40
I	Verlag 009	03.08.2007	An 007	Anzeigen	geschlossen	550.00	550.00
I	bbbb	03.08.2007	www	Online	geschlossen	6666.00	75.00
I	Groß	07.08.2007	große zahl	Sponsoring	offen	100000.00	101000.00
I	yyyyyyyyyy	11.08.2007	xxxxxxxxxxx	Events	geschlossen	700.00	560.00
I	tttttt	18.08.2007	ggggg	Online	offen	400.00	0.00
I	RE3009	01.02.2008	Reinigung Tankanlage	Online	geschlossen	4000.00	3550.00
II	w3	05.08.2007	werben	Werbematerial	geschlossen	400.00	1000.00

In the page where the budget year is located you will get an overview of the sums of every costcenter and department of the closed budgets.

## Marketing Budget Plan 2007

	Quartal I				Quartal II				Quartal III			
	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz
Budget gesamt	3.851	11.949,80	4.759,40	7.190,40	5.000	500,00	1.000,00	500,00	5.000	450,00	400,00	50,00
<b>1</b>	<b>Quartal I</b>				<b>Quartal II</b>				<b>Quartal III</b>			
<b>Unternehmen</b>	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz
Online	501	10.699,80	3.649,40	7.050,40	0	0,00	0,00	0,00	5.000	450,00	400,00	50,00
Werbeaussendungen	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Werbematerial	0	0,00	0,00	0,00	5.000	400,00	1.000,00	600,00	0	0,00	0,00	0,00
Druckmaterial	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Sponsoring	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Messen	0	0,00	0,00	0,00	0	100,00	0,00	100,00	0	0,00	0,00	0,00
Events	350	700,00	560,00	140,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Anzeigen	3.000	550,00	550,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Beratung	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Sonstiges	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
<b>Budget gesamt</b>	3.851	11.949,80	4.759,40	7.190,40	5.000	500,00	1.000,00	500,00	5.000	450,00	400,00	50,00
<b>2</b>	<b>Quartal I</b>				<b>Quartal II</b>				<b>Quartal III</b>			
<b>Geschäftsleitung</b>	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz	Erreichte Kontakte	Budget (SOLL)	Budget (IST)	Differenz
Online	501	10.699,80	3.649,40	7.050,40	0	0,00	0,00	0,00	5.000	450,00	400,00	50,00
Werbeaussendungen	0	0,00	0,00	0,00	0	0,00	0,00	0,00	0	0,00	0,00	0,00
Werbematerial	0	0,00	0,00	0,00	5.000	400,00	1.000,00	600,00	0	0,00	0,00	0,00

In this view you can collapse/expand the costcenters of the different departments by clicking on the names of the departments (1,2). All closed budgets are accumulated in the quarters they belong to.

## Reference

Options in the template SETUP:

If this options are set in the template setup, they overrule the flexform-settings.

*plugin.tx\_budmgr\_pi1:*

Property:	Data type:	Description:	Default:
displayMode	string	The display mode for the calendar. Values are <b>monthMultiRow</b> and <b>monthSingleRow</b>	monthMultiRow
decimalSeparator	string	The decimal separator	,
showContacts	int	If set, the contact fields are shown	1
showWarnings	boolean	If set, warnings are enabled	1

## Appendix

### Known problems

- if you catch bugs, please report them to [postmaster@joachim-ruhs.de](mailto:postmaster@joachim-ruhs.de)

### To-Do

- any wishes, tell me

## FAQ

- 

## Changelog

- 2008-02-01, version 0.0.6, initial release