English version

StoryPoint

Step-by-step Instructions

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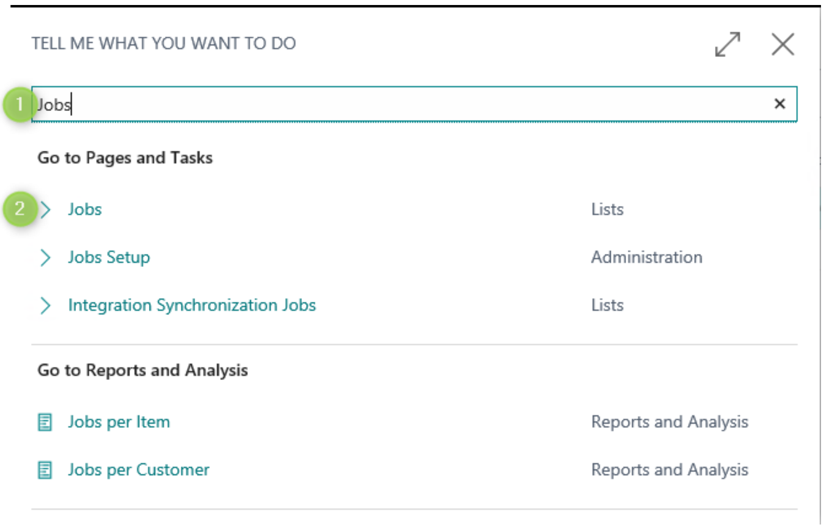
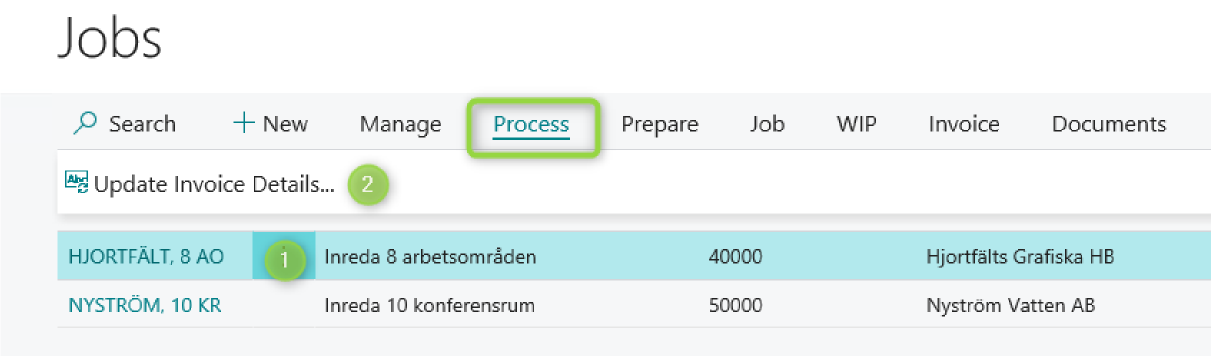
Update Invoice Details on a Job

1. Search for Job
    a. Press ALT+Q or Light bulb 
    b. Type Jobs in search field (1) and select it (2)

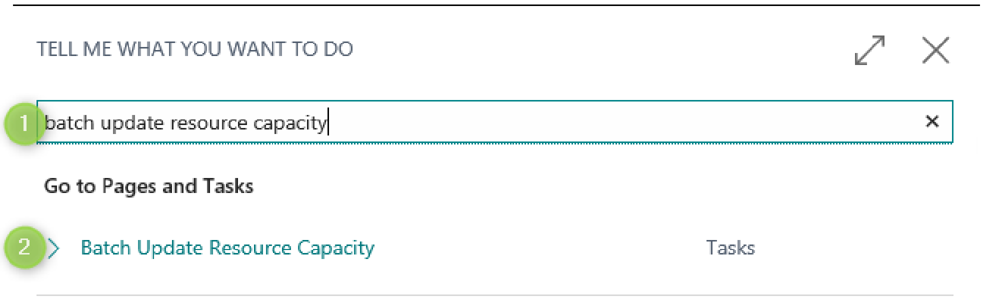


2. Select the Job you want to update the invoicing details for (1). Go to menu item Update Invoice Details (2) under Process.
3. By pressing Update Invoice Details (2), the customer information on the Job is updated with the actual information on the Customer.

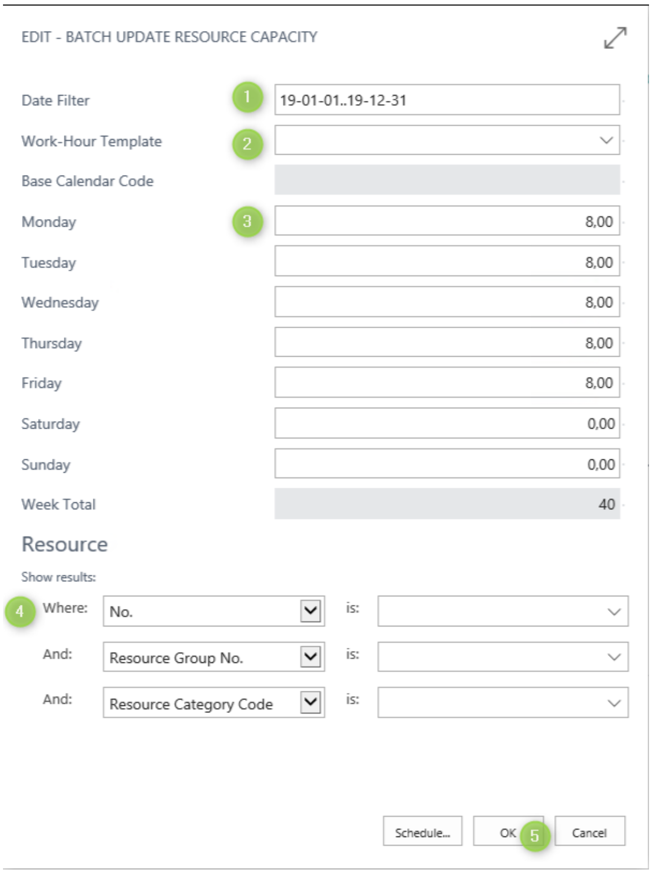


Batch Update Resource Capacity

1. Search for Batch Update Resource Capacity
    a. Press ALT+Q or light bulb 
    b. Type batch update resource capacity search field (1) and select it

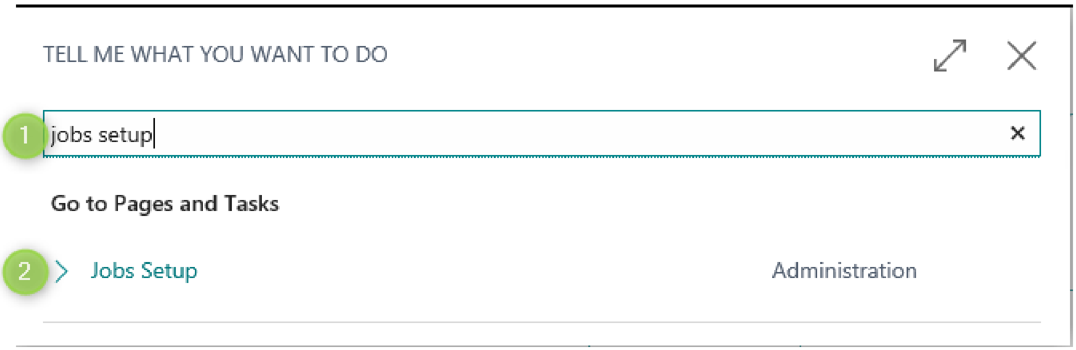


2. Enter filters
    a. Enter a date filter (1).
    b. Select a Work-Hour Template (2) and/or type in the hours (3).
    c. Choose to filter on resource (4) if you do not want to create/update capacity entries for all resources.
    d. When done, press OK (5).

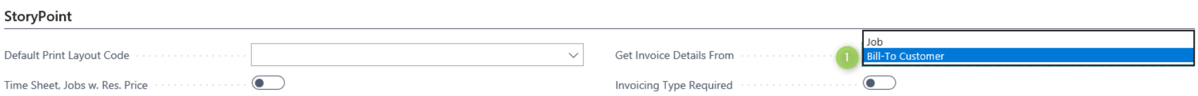


Get Invoice Details From Bill-To Customer for Job Invoices

1. Search for Jobs Setup
   a. Press ALT+Q or light bulb 
   b. Type jobs setup (1) and select it (2)

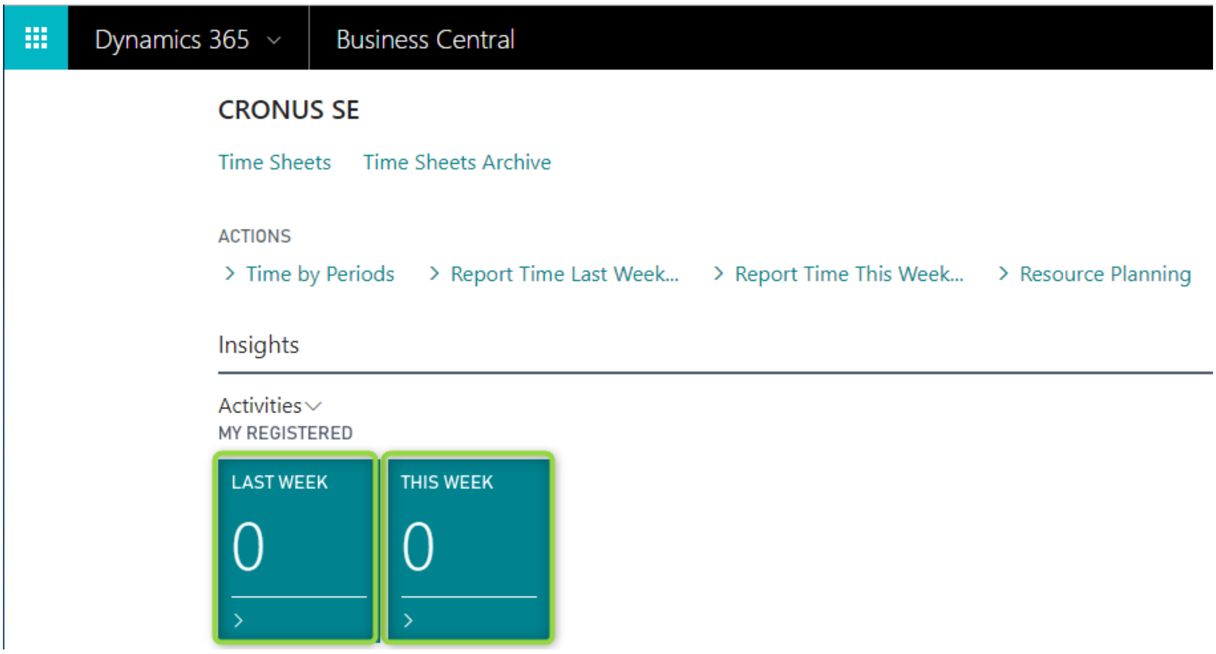


2. Expand Fast Tab StoryPoint
3. Select Bill-To Customer (1) in field Get Invoice Details from

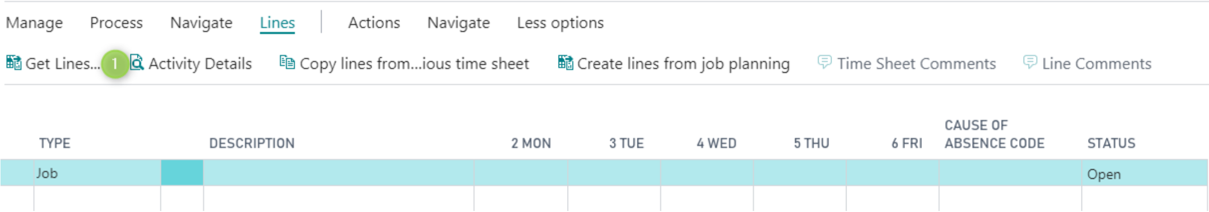


Report Time

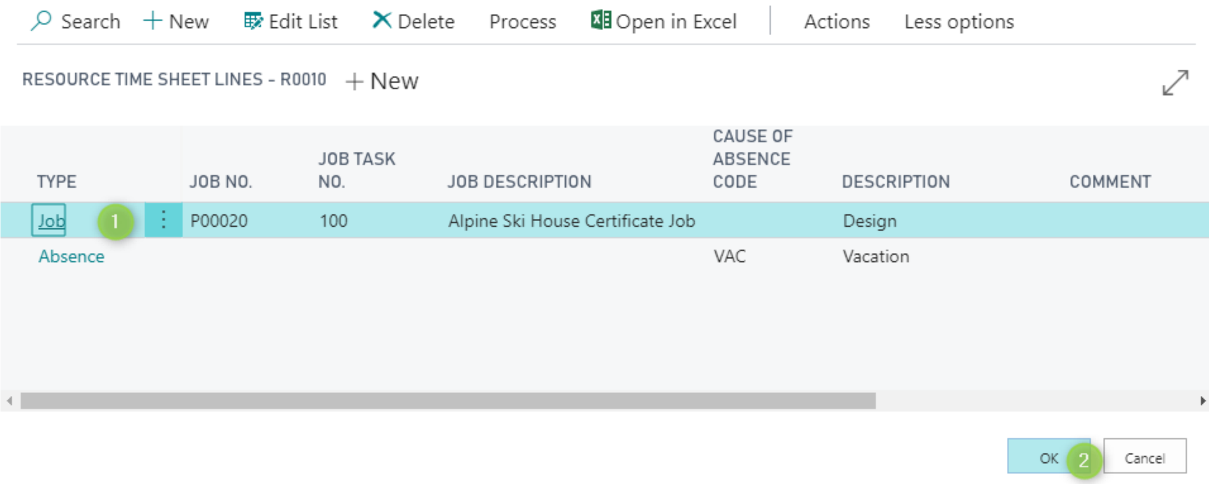
Click on LAST WEEK or THIS WEEK on your start page (when using StoryPoint Role Center "Tidrapportör").



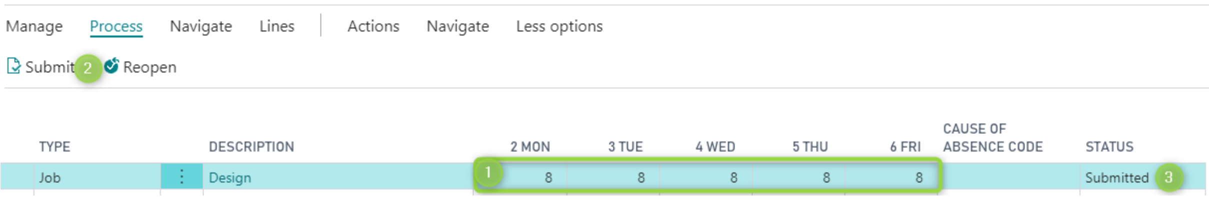
In StoryPoint you can select your favorite jobs or absence by clicking on Get Lines (1)



Choose what you have been working on (1) and select OK (2)

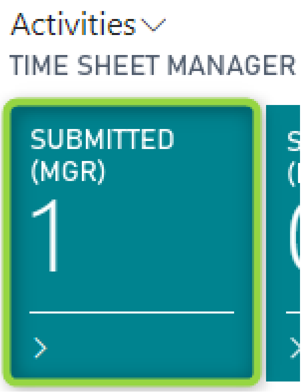


Type in how many hours you have worked each day (1). Select Submit (2) and the time sheet will be submitted to the approver and the status will be changed from Open to Submitted (3)

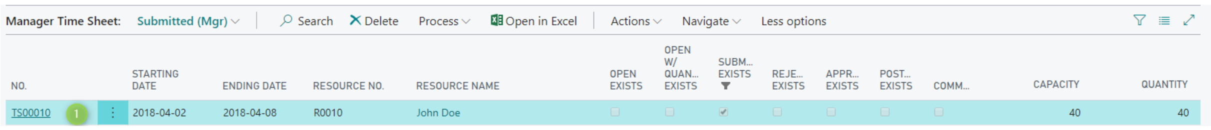


Approve Time

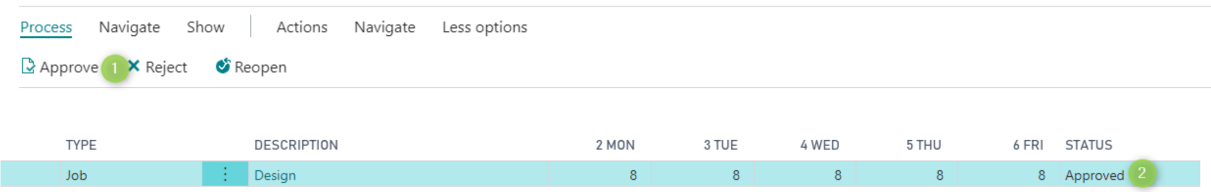
Click on SUBMITTED (MGR) your start page (when using StoryPoint Role Center “Projektledare”).



Select and click on (1) time sheet you want to open and approve.

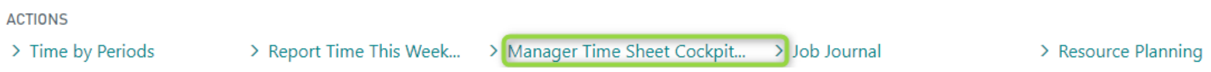


Click on Approve (1) after reviewing the submitted line. If there is more than one submitted line, you can choose if you want to approve one or all lines. When a line is approved the status will be changed to Approved (3).



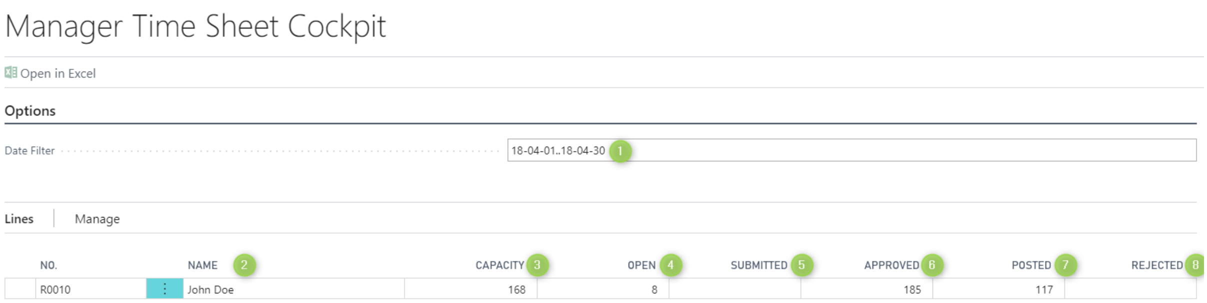
Analyze Reported Time

Click on Manager Time Sheet Cock Pit on your start page (when using StoryPoint Role Center “Projektledare”).



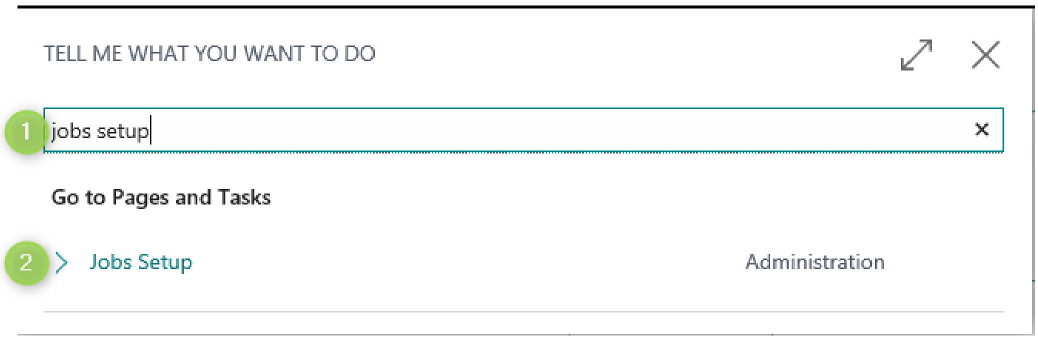
Add a date filter (1) to analyze a specific period.

You can see the resources (2) capacity (3), how many open (4), submitted (5), approved (6), posted (7), and rejected (8) hours for each resource.

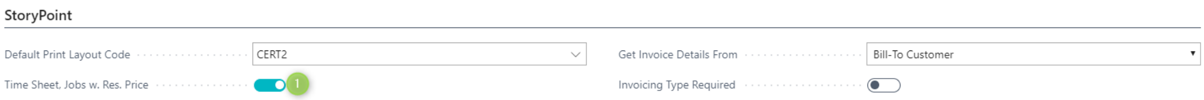


Restrict Which Jobs Resources Can Report Time On

1. To restrict resources to only report time on jobs that they have a price on, go to Jobs Setup
   a. Press ALT+Q or light bulb 
   b. Type jobs setup (1) and select it (2)



2. Expand Fast Tab StoryPoint
3. Change Time Sheet, Jobs w Res. Price to yes (1)

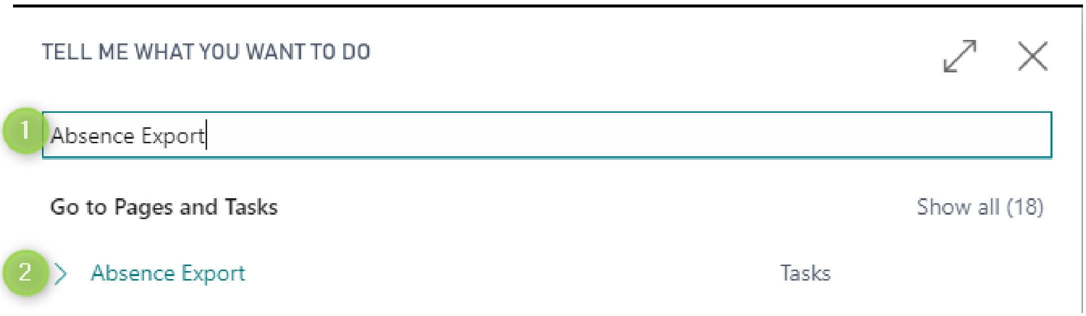


Export Absence

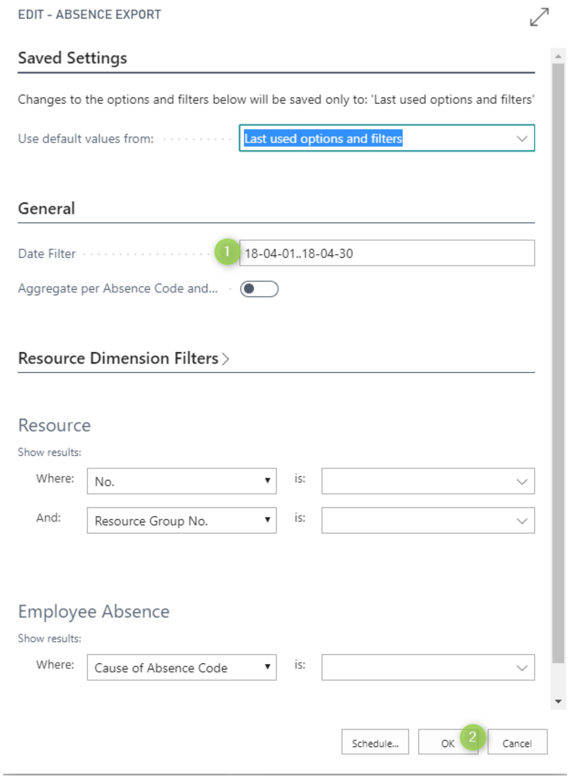
1. Search for Absence Export

    a. Press ALT+Q or light bulb 

    b. Type Absence Export in search field (1) and select it (2)



2. Fill in a date filter (1) if you want to export absence for a specific period, then click OK (2).



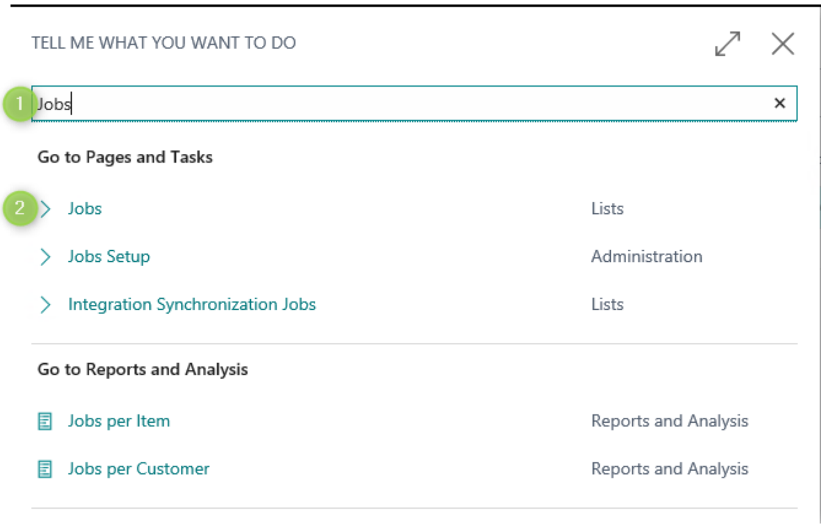
3. The file will be saved in the format you have chosen in Jobs Setup.

Create a Job

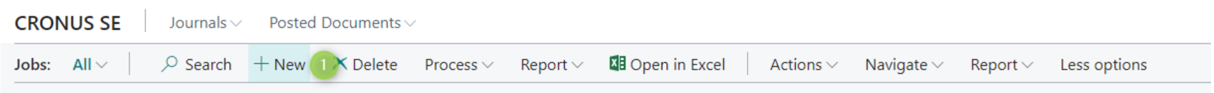
1. Search for Job

    a. Press ALT+Q or light bulb 

    b. Type Jobs in search field (1) and select it (2)



2. Click on New (1)



3. The Job card is opened

    a. Create a new number by typing in a number manually or press enter if your settings allows automatic numbering (1)

    b. Type in a description (2)

    c. Choose a Bill-to customer (3), this field is mandatory. For internal jobs use an internal customer.

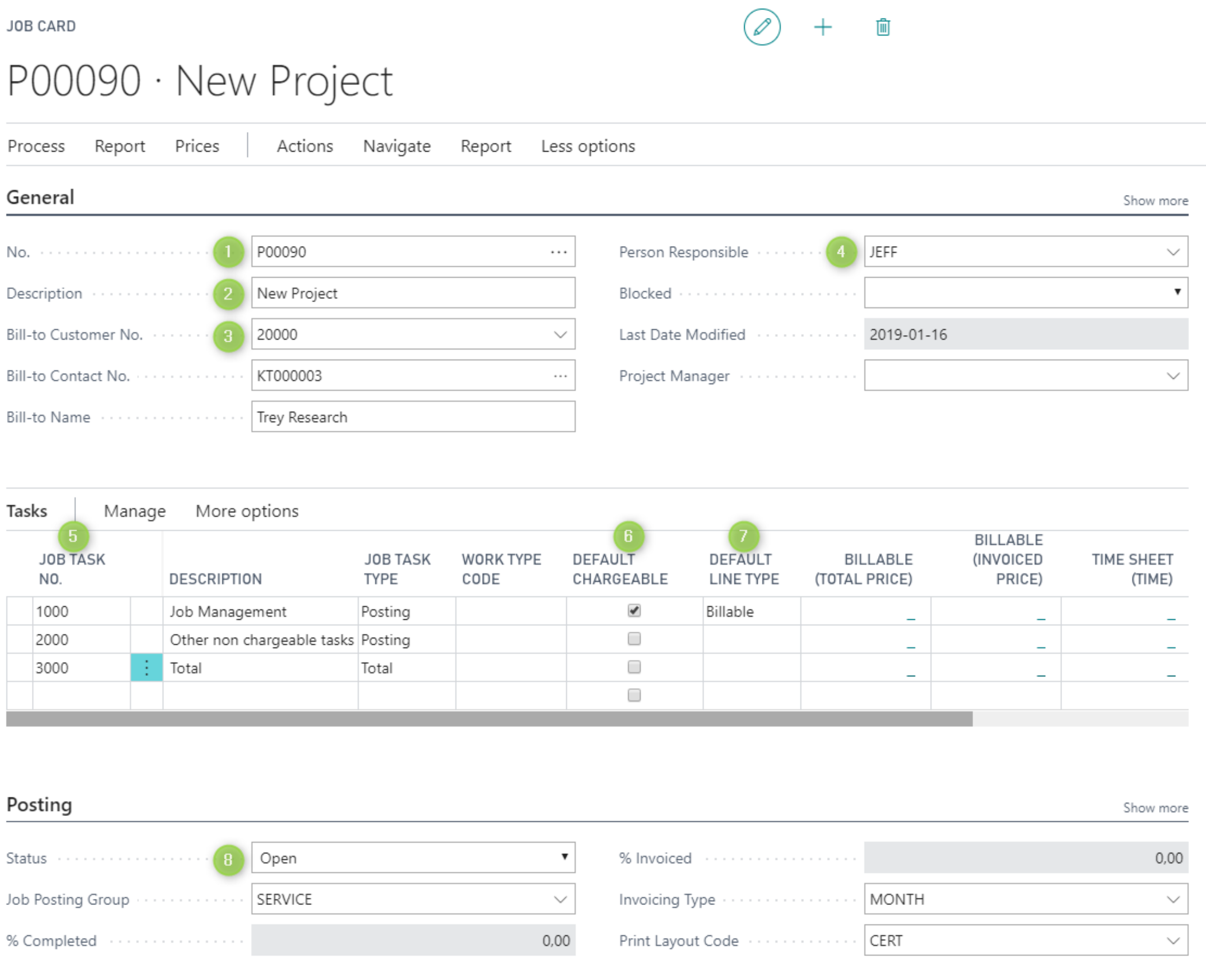
    d. Choose a Person Responsible (4). (You can filter the job journals on this value)

    e. Type in a job task number (5) and a description of your choice

    f. If the task should have a price, set Default Chargeable to Yes (6)

    g. If the task should be billable, choose Billable in Default Line Type

    h. When all mandatory fields are filled in, change the status to open (8)



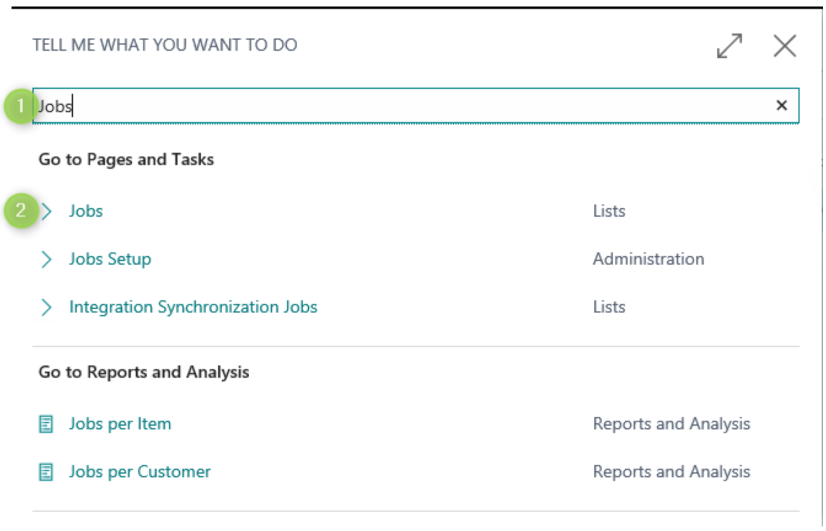
Copy a Job

You can create a new job by copying an existing job.

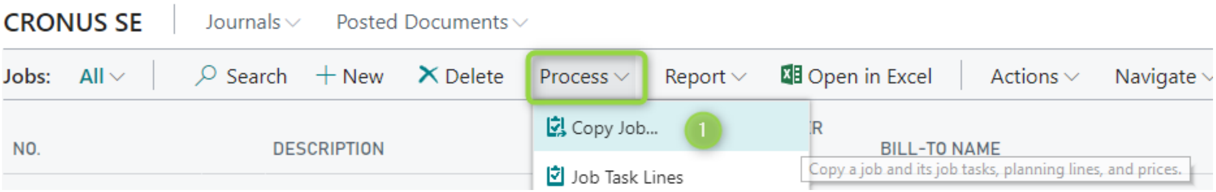
1. Search for Job

    a. Press ALT+Q or light bulb 

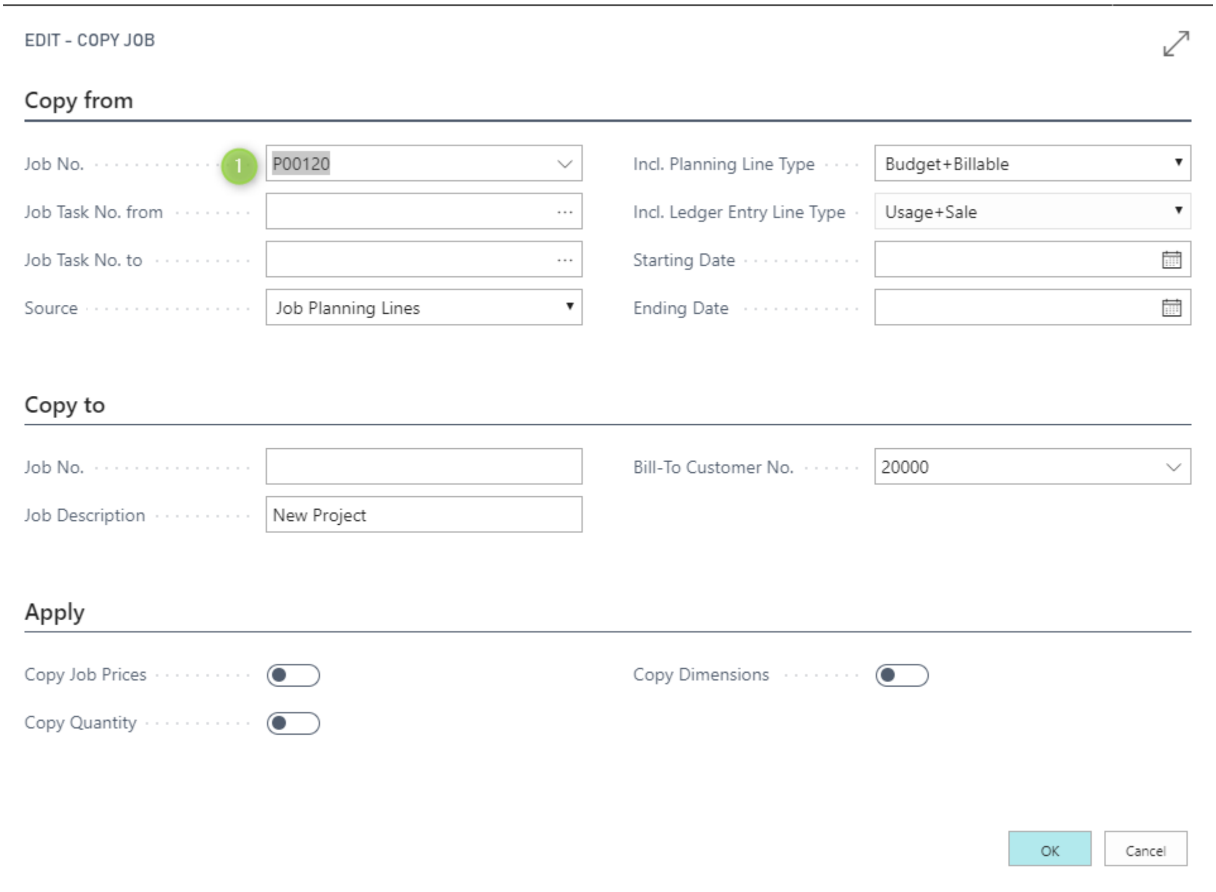
    b. Type Jobs in search field (1) and select it (2)



2. Click on Copy Job (1)



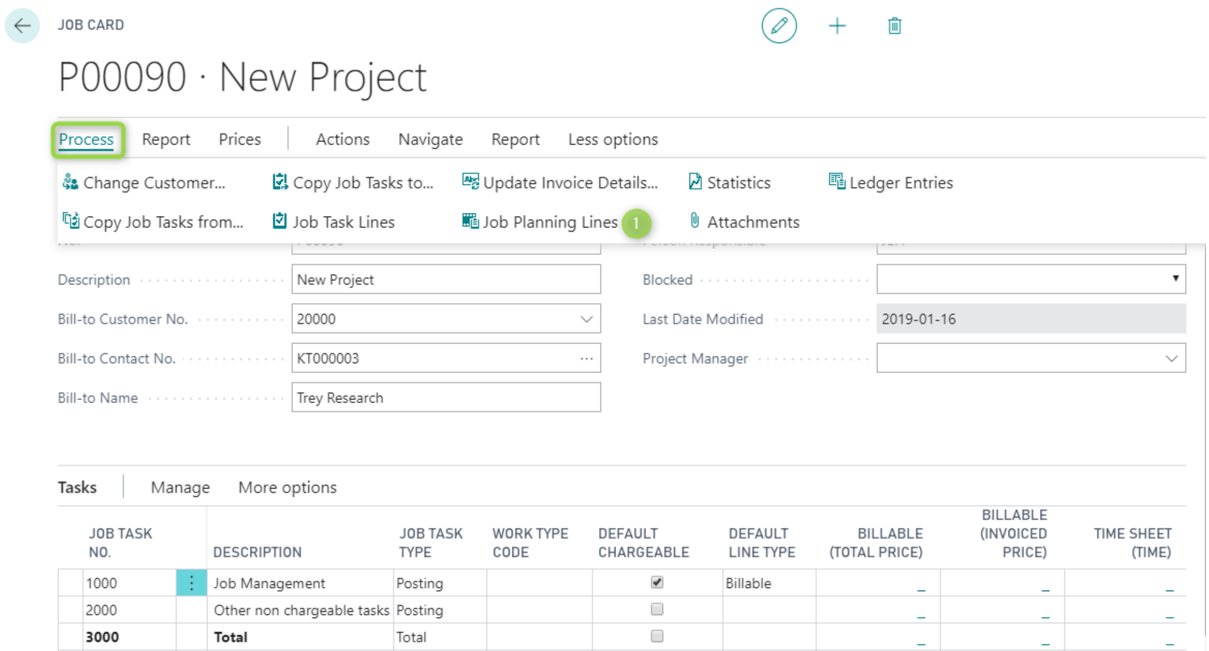
3. Job No. (1) is mandatory. Make the changes that suits you best and Click OK. Your new job is created.



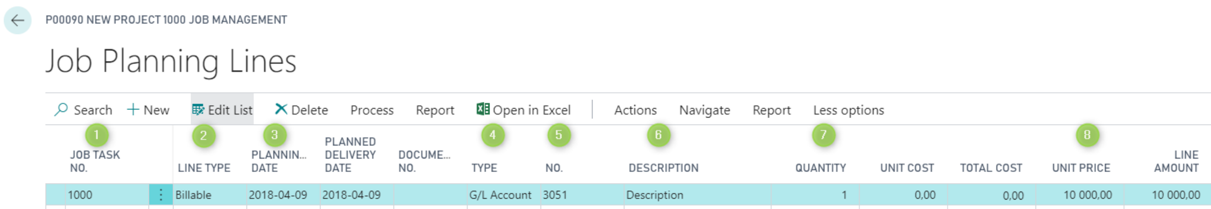
Create Job Planning Lines

To create a job planning line manually from the job card.

1. Open the job you want to add planning lines to
2. Click in Job Planning Lines (1)

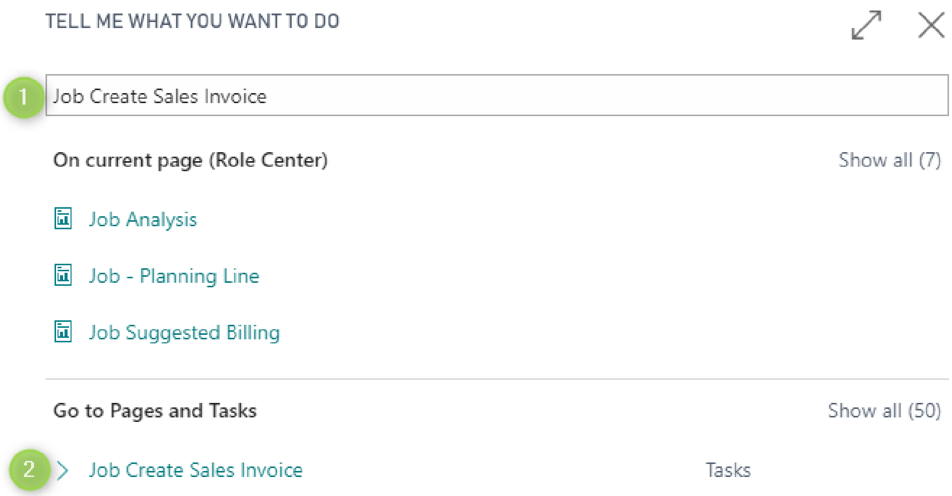


3. Add a new line
   a. Choose job task number (1)
   b. Choose line type (2) Billable or Both Budget and Billable if you want to invoice this row. Choose Budget if it's a budget row
   c. Choose a date in Planning Date (3)
   d. Choose what Type (4) you
   e. NO. (5) is depended on what type (4) you have chosen.
   f. Add a description (6), quantity (7) and a unit price (8)

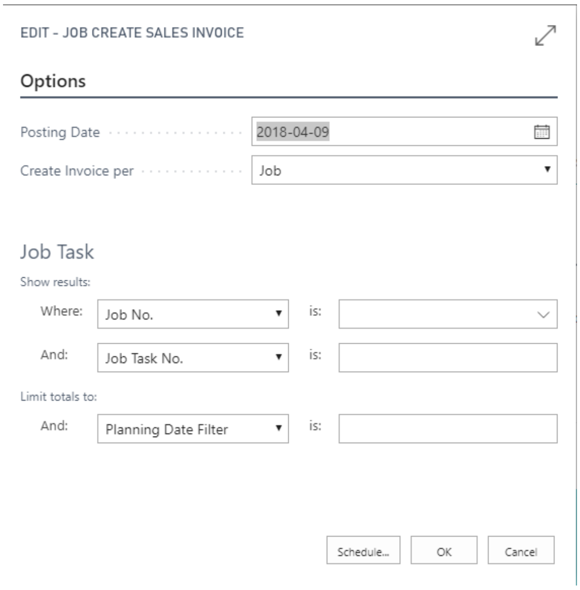


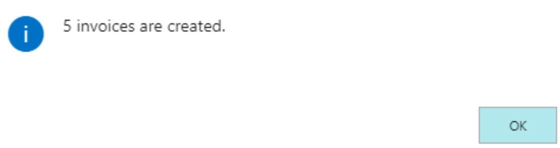
Create Job sales Invoices

1. Search for Job Create Sales Invoice
    a. Press ALT+Q or light bulb 
    b. Type Job Create Sales Invoice in search field (1) and select it (2)

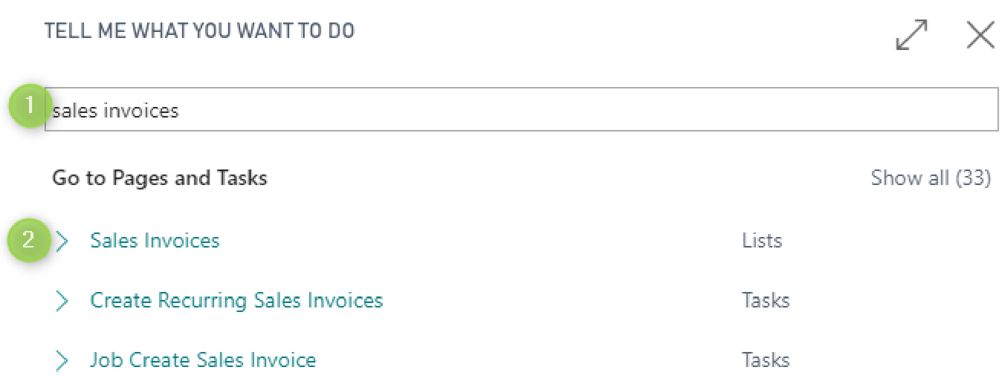


2. If you do not apply any filters and presses OK, you will create sales invoices for all jobs with billable job planning lines





3. To see the created sales invoices
    a. Press ALT+Q or light bulb 
    b. Type Sales Invoices in search field (1) and select it (2)



4. Review the created invoices and then choose to post or delete the invoices