

English version

# StoryPoint

Step-by-step Instructions




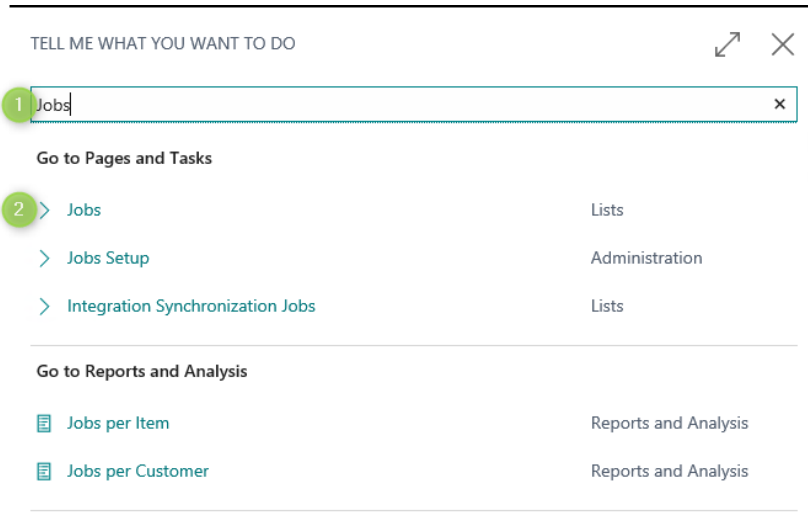
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## Update Invoice Details on a Job

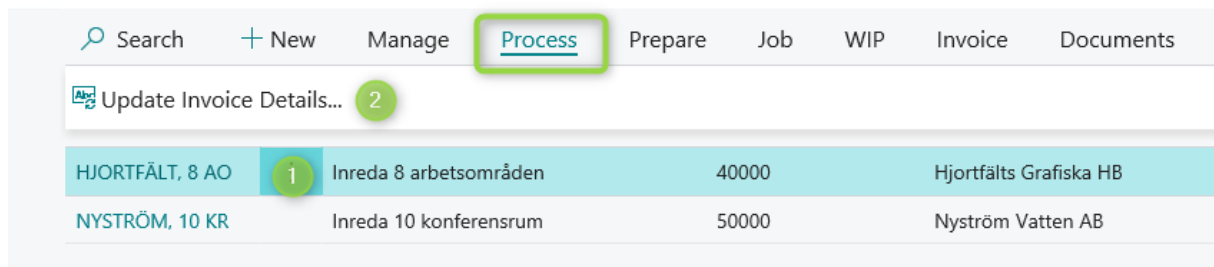
### 1. Search for Job

- 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.

## Jobs



## 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

TELL ME WHAT YOU WANT TO DO



1 batch update resource capacity

Go to Pages and Tasks

2 > Batch Update Resource Capacity

Tasks

## 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).

EDIT - BATCH UPDATE RESOURCE CAPACITY

Date Filter	1	19-01-01..19-12-31
Work-Hour Template	2	
Base Calendar Code		
Monday	3	8,00
Tuesday		8,00
Wednesday		8,00
Thursday		8,00
Friday		8,00
Saturday		0,00
Sunday		0,00
Week Total		40

Resource

Show results:


4 Where: No. is:

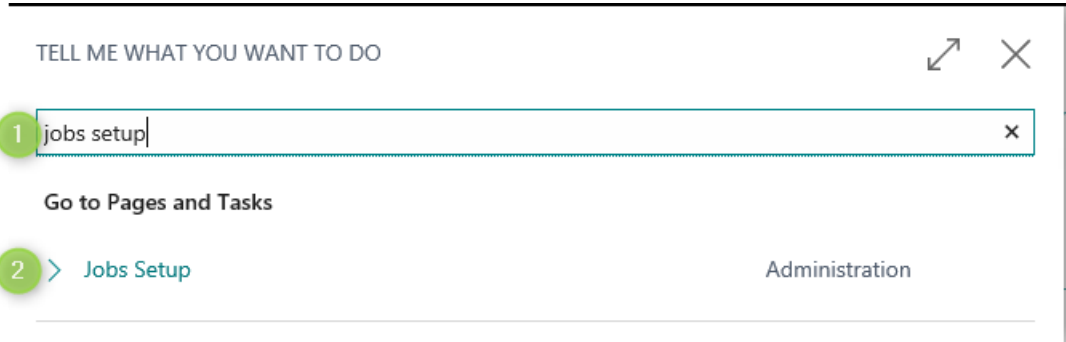
And: Resource Group No. is:

And: Resource Category Code is:

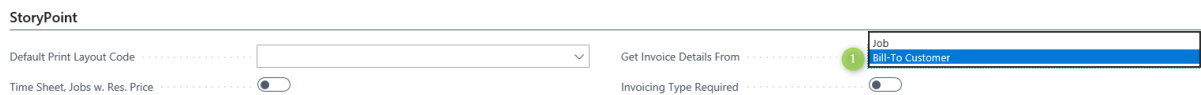
Schedule... OK 5 Cancel

## 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)

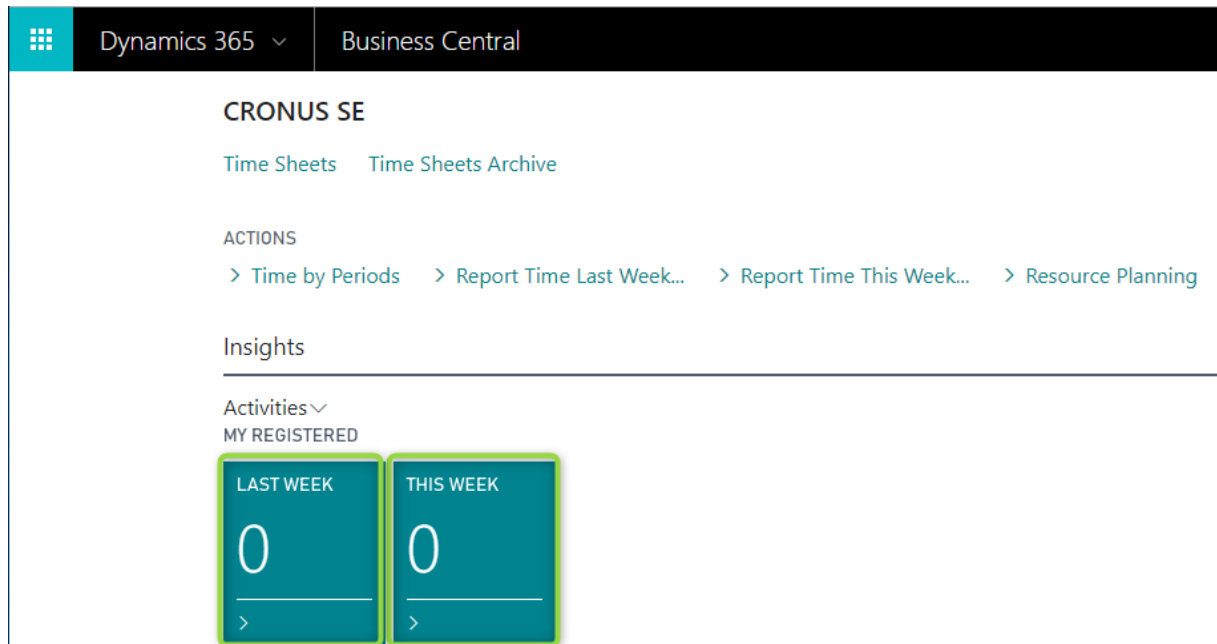


2. Expand Fast Tab StoryPoint
3. Select Bill-To Customer (1) in field Get Invoice Details from



## 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)

Manage Process Navigate Lines | Actions Navigate Less options

Get Lines... (1) Activity Details Copy lines from...ious time sheet Create lines from job planning Time Sheet Comments Line Comments

TYPE	DESCRIPTION	2 MON	3 TUE	4 WED	5 THU	6 FRI	CAUSE OF ABSENCE CODE	STATUS
Job								Open

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

Search + New Edit List Delete Process Open in Excel | Actions Less options

RESOURCE TIME SHEET LINES - R0010 + New ↗

TYPE	JOB NO.	JOB TASK NO.	JOB DESCRIPTION	CAUSE OF ABSENCE CODE	DESCRIPTION	COMMENT
Job (1)	P00020	100	Alpine Ski House Certificate Job		Design	
Absence				VAC	Vacation	

OK (2) Cancel

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)

Manage Process Navigate Lines | Actions Navigate Less options

Submit (2) Reopen

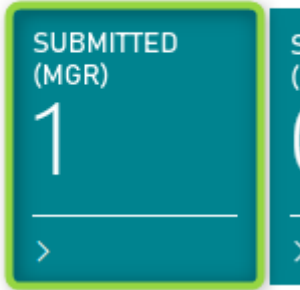
TYPE	DESCRIPTION	2 MON	3 TUE	4 WED	5 THU	6 FRI	CAUSE OF ABSENCE CODE	STATUS
Job	Design	(1) 8	8	8	8	8		Submitted (3)

## Approve Time

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

Activities ▾

TIME SHEET MANAGER



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

NO.	STARTING DATE	ENDING DATE	RESOURCE NO.	RESOURCE NAME	OPEN EXISTS	OPEN W/ QUAN... EXISTS	SUBM... EXISTS	REJE... EXISTS	APPR... EXISTS	POST... EXISTS	COMM...	CAPACITY	QUANTITY
TS000010	2018-04-02	2018-04-08	R0010	John Doe	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	40	40

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).

TYPE	DESCRIPTION	2 MON	3 TUE	4 WED	5 THU	6 FRI	STATUS
Job	Design	8	8	8	8	8	Approved

## Analyze Reported Time

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

ACTIONS  
> Time by Periods > Report Time This Week... > **Manager Time Sheet Cockpit...** > Job Journal > Resource Planning

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.

# Manager Time Sheet Cockpit

Open in Excel


## Options

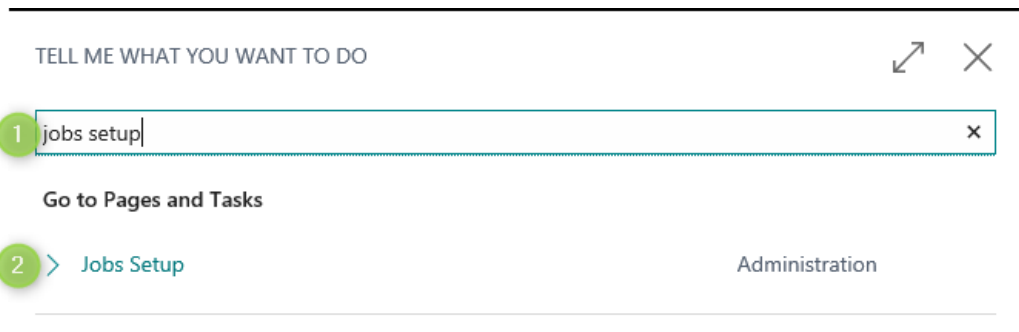
Date Filter ..... 18-04-01..18-04-30 1

Lines | Manage

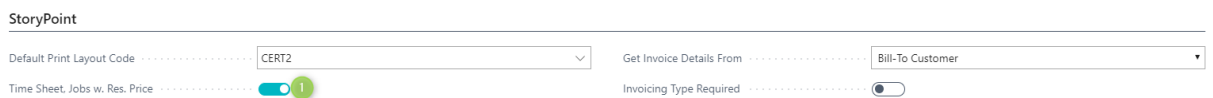
NO.	NAME 2	CAPACITY 3	OPEN 4	SUBMITTED 5	APPROVED 6	POSTED 7	REJECTED 8
R0010	John Doe	168	8		185	117	

## Restrict Which Jobs Resources Can Report Time On

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




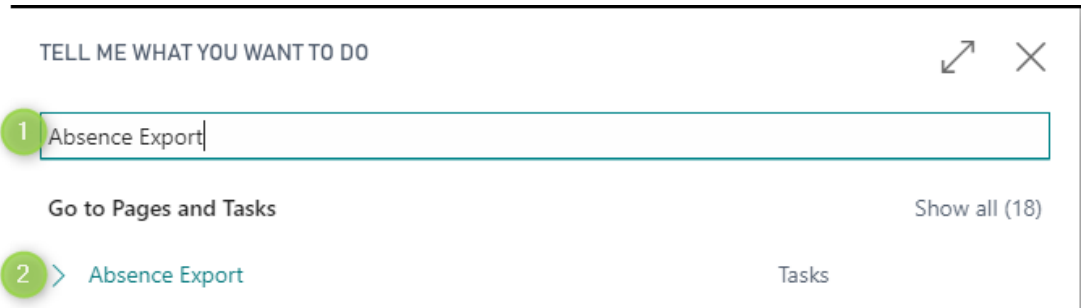
- Expand Fast Tab StoryPoint
- Change Time Sheet, Jobs w Res. Price to yes (1)





## 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)



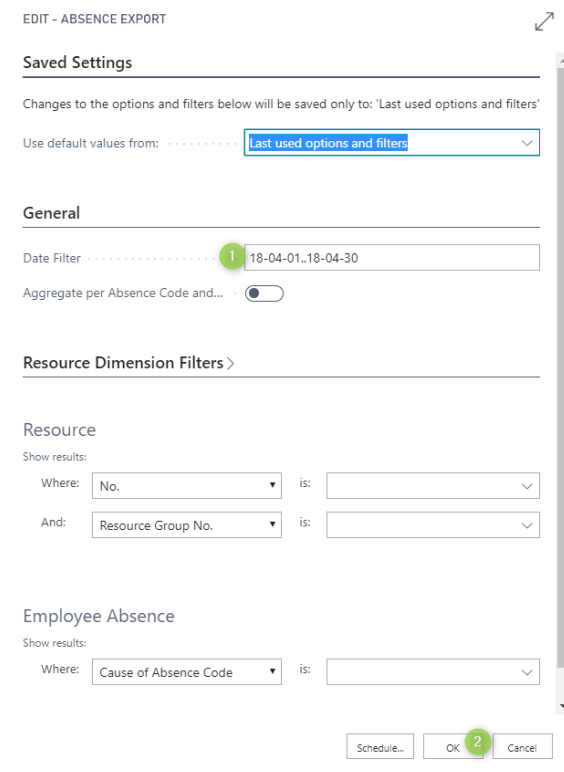
TELL ME WHAT YOU WANT TO DO ↗ ✕

1 Absence Export

Go to Pages and Tasks Show all (18)

2 > Absence Export Tasks

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



EDIT - ABSENCE EXPORT ↗

**Saved Settings**

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters ▾

**General**

Date Filter 1 18-04-01..18-04-30

Aggregate per Absence Code and...

**Resource Dimension Filters >**

**Resource**

Show results:

Where: No. ▾ is: ▾

And: Resource Group No. ▾ is: ▾

**Employee Absence**

Show results:


Where: Cause of Absence Code ▾ is: ▾

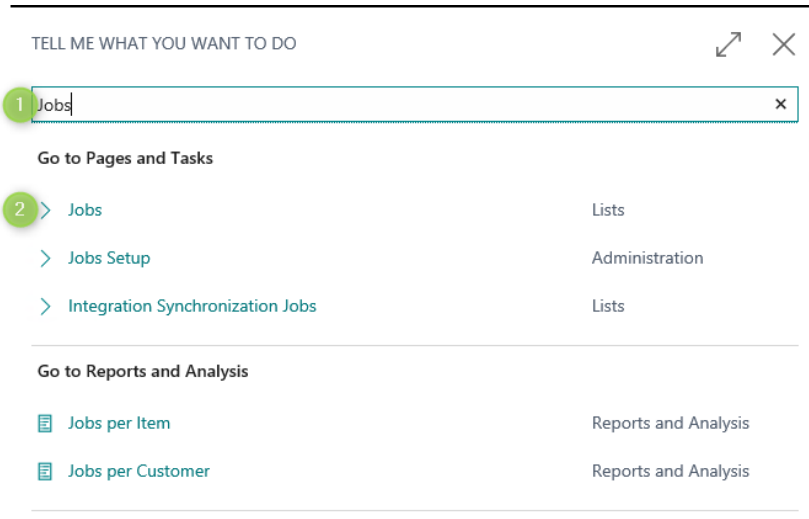
Schedule... OK 2 Cancel

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

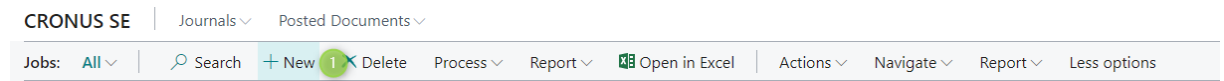
## Create a Job

### 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)



# P00090 · New Project

Process Report Prices | Actions Navigate Report Less options

## General

Show more

No. .... 1	P00090	Person Responsible .... 4	JEFF
Description .... 2	New Project	Blocked .....	
Bill-to Customer No. .... 3	20000	Last Date Modified .....	2019-01-16
Bill-to Contact No. ....	KT000003	Project Manager .....	
Bill-to Name .....	Trey Research		

## Tasks Manage More options

JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	WORK TYPE CODE	6 DEFAULT CHARGEABLE	7 DEFAULT LINE TYPE	BILLABLE (TOTAL PRICE)	BILLABLE (INVOICED PRICE)	TIME SHEET (TIME)
1000	Job Management	Posting		<input checked="" type="checkbox"/>	Billable	-	-	-
2000	Other non chargeable tasks	Posting		<input type="checkbox"/>		-	-	-
3000	Total	Total		<input type="checkbox"/>		-	-	-

## Posting

Show more

Status .... 8	Open	% Invoiced .....	0.00
Job Posting Group .....	SERVICE	Invoicing Type .....	MONTH
% Completed .....	0.00	Print Layout Code .....	CERT

## 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)

TELL ME WHAT YOU WANT TO DO ↗ ✕

1 Jobs

**Go to Pages and Tasks**

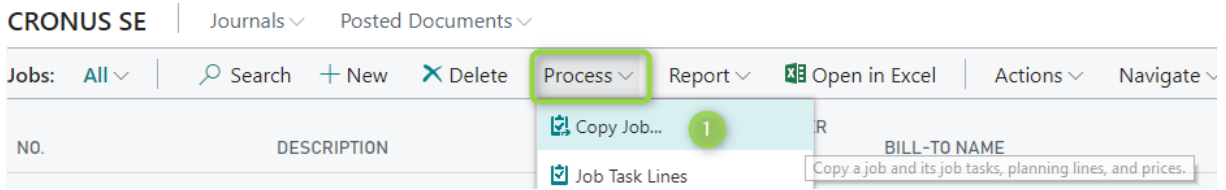
- 2 > Jobs Lists
- > Jobs Setup Administration
- > Integration Synchronization Jobs Lists

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**Go to Reports and Analysis**

- Jobs per Item Reports and Analysis
- Jobs per Customer Reports and Analysis

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.

EDIT - COPY JOB ↗

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**Copy from**

Job No. .... 1	<input type="text" value="P00120"/>	Incl. Planning Line Type	<input type="text" value="Budget+Billable"/>
Job Task No. from	<input type="text"/>	Incl. Ledger Entry Line Type	<input type="text" value="Usage+Sale"/>
Job Task No. to	<input type="text"/>	Starting Date	<input type="text"/>
Source	<input type="text" value="Job Planning Lines"/>	Ending Date	<input type="text"/>

---

**Copy to**

Job No.	<input type="text"/>	Bill-To Customer No.	<input type="text" value="20000"/>
Job Description	<input type="text" value="New Project"/>		

---

**Apply**

Copy Job Prices	<input type="checkbox"/>	Copy Dimensions	<input checked="" type="checkbox"/>
Copy Quantity	<input type="checkbox"/>		

## 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)

← JOB CARD ✎ + 🗑

### P00090 · New Project

Process | Report | Prices | Actions | Navigate | Report | Less options

Change Customer... Copy Job Tasks to... Update Invoice Details... Statistics Ledger Entries  
 Copy Job Tasks from... Job Task Lines Job Planning Lines (1) Attachments

Description: New Project  
 Bill-to Customer No.: 20000  
 Bill-to Contact No.: KT000003  
 Bill-to Name: Trey Research  
 Blocked: [Dropdown]  
 Last Date Modified: 2019-01-16  
 Project Manager: [Dropdown]

Tasks | Manage | More options

JOB TASK NO.	DESCRIPTION	JOB TASK TYPE	WORK TYPE CODE	DEFAULT CHARGEABLE	DEFAULT LINE TYPE	BILLABLE (TOTAL PRICE)	BILLABLE (INVOICED PRICE)	TIME SHEET (TIME)
1000	Job Management	Posting		<input checked="" type="checkbox"/>	Billable	-	-	-
2000	Other non chargeable tasks	Posting		<input type="checkbox"/>		-	-	-
<b>3000</b>	<b>Total</b>	Total		<input type="checkbox"/>		-	-	-

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)

← P00090 NEW PROJECT 1000 JOB MANAGEMENT


### Job Planning Lines



Search + New Edit List Delete Process Report Open in Excel Actions Navigate Report Less options

JOB TASK NO.	LINE TYPE	PLANNING DATE	PLANNED DELIVERY DATE	DOCUME. NO.	TYPE	NO.	DESCRIPTION	QUANTITY	UNIT COST	TOTAL COST	UNIT PRICE	LINE AMOUNT
1000	Billable	2018-04-09	2018-04-09		G/L Account	3051	Description	1	0.00	0.00	10 000.00	10 000.00

## Create Job sales Invoices




### 1. Search for Job Create Sales Invoice

- Press ALT+Q or light bulb 
- Type Job Create Sales Invoice in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO  

1 Job Create Sales Invoice

On current page (Role Center) Show all (7)


-  Job Analysis
-  Job - Planning Line
-  Job Suggested Billing

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Go to Pages and Tasks Show all (50)

2 > Job Create Sales Invoice Tasks

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

EDIT - JOB CREATE SALES INVOICE 

**Options**

Posting Date ..... 2018-04-09 

Create Invoice per ..... Job ▾

**Job Task**


Show results:

Where: Job No. ▾ is: ▾


And: Job Task No. ▾ is: ▾

Limit totals to:

And: Planning Date Filter ▾ is: ▾

 5 invoices are created.

### 3. To see the created sales invoices

- Press ALT+Q or light bulb 
- Type Sales Invoices in search field (1) and select it (2)

TELL ME WHAT YOU WANT TO DO



1 sales invoices

Go to Pages and Tasks

Show all (33)

- 2 > Sales Invoices Lists
- > Create Recurring Sales Invoices Tasks
- > Job Create Sales Invoice Tasks

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

← SALES INVOICES

Search + New Manage Release Posting Invoice Request Approval Open in Excel | Actions Navigate Report Less options

Post Post and Send... Post Batch...

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	SELL-TO CONTACT	POSTING DATE	LOCATION CODE	ASSIGNED USER ID	DUE DATE
102236	30000	School of Fine Art			2018-04-09			2018-04-30
102239	30000	School of Fine Art			2018-04-09			2018-04-30
102240	10000	Adatum Corporation		Jens Lind	2018-04-09			2018-05-09
102241	10000	Adatum Corporation		Jens Lind	2018-04-09			2018-05-09
102242	10000	Adatum Corporation		Jens Lind	2018-04-09			2018-05-09