2025

Project Cloud General Settings Configuration Guide

Project Cloud General Settings Configuration Guide

The **Project**, **Timesheets**, and **Resource Allocation** apps in CloudOffix Project Cloud are pre-installed. However, to optimize their performance and align them with specific business processes, certain configurations must be made within the General Settings menu (*Settings* > *General Settings*) or the relevant apps' internal configuration options.

This guide outlines the General Settings for each app, emphasizing critical configurations that are essential for functionality. It also covers the installation of supplementary apps required for advanced functionality.

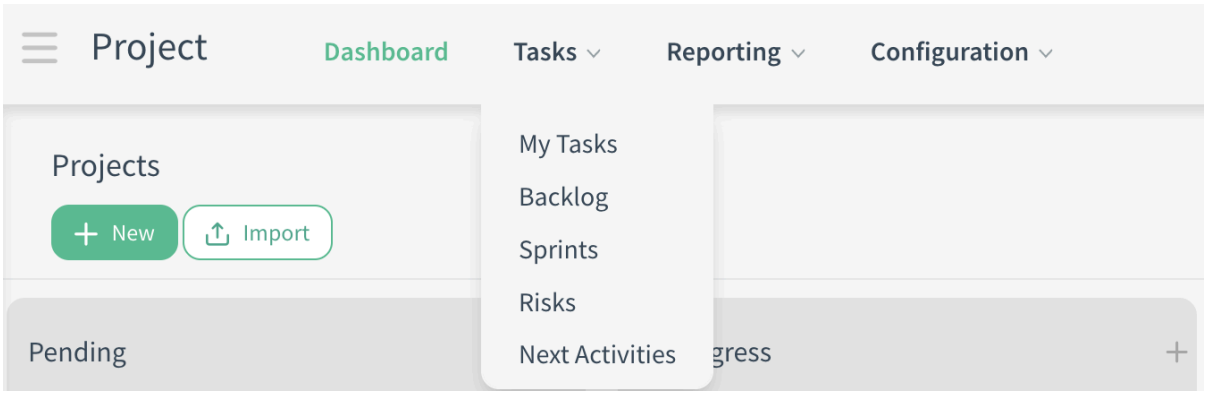
Project App General Settings

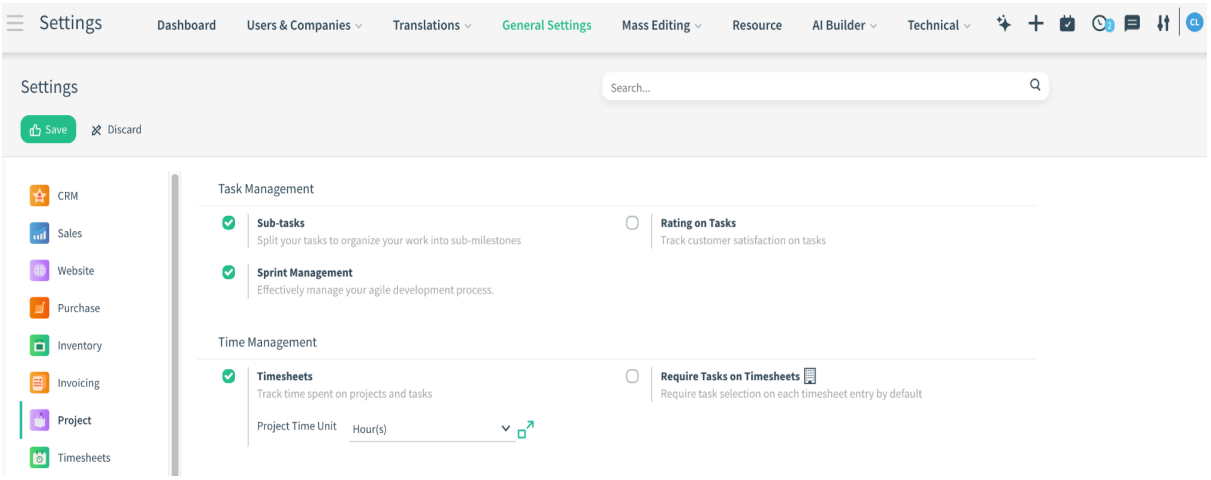
The **Project** app serves as the foundation for task management and project collaboration in CloudOffix Project Cloud.

Key General Settings:

- **Time Management:**
    - ***Timesheets:*** Enable the '*Timesheets*' option under *Settings* > *General Settings* > *Project* (or Project > Configuration > Settings) to allow time tracking on tasks. This setting is critical for integrating the Project app with the Timesheets app, enabling users to log hours directly on tasks for billing or reporting purposes.
    - ***Require Tasks on Timesheets:*** Check the box for 'Require Tasks on Timesheets' to mandate task selection for each timesheet entry by default. The system will require a task to be selected in the '*Task*' field before saving, displaying a warning notification if no task is chosen.
- **Task Management:**
    - ***Sub-tasks:*** Enabling this option allows the creation of sub-tasks within tasks.

- ***Sprint Management:*** Enabling this option adds the '*Sprint*' function under *Tasks* > *Sprints*, allowing tasks to be assigned to specific sprints for agile development. Sprint Management is essential for teams adopting agile methodologies. Sprints enable teams to focus on a defined set of tasks per cycle, ensuring realistic commitments and better resource utilization.
    - Enabling this option installs a dedicated Sprint module and adds two sub-menus under Tasks in the Project App: *Sprints* and *Backlog*. Under the Backlog menu, all tasks requiring refinement are displayed. During sprint planning, tasks are selected from the Backlog and incorporated into the sprint.





Note: *Additional Modules*

In CloudOffix Project Cloud, while the core Project, Timesheet, and Resource Allocation apps provide robust functionality for standard project management and billing, certain specialized business models may require additional modules to handle complex service delivery and invoicing workflows.

They are optional and recommended for organizations with the described business model; [**Additional Modules for the Business Model: Recurring Service Delivery Under a Single Project**]

Resource Allocation App General Settings

The **Resource Allocation** app, optimizes workforce and resource allocation, providing efficiency analysis.

Key General Settings:

- **Allocation Working Hours:**
    - ***Default Capacity:*** Configure 'Default Capacity' under *Settings* > *General Settings* > *Resource Allocation* (or Resource Allocation > Configuration > Settings) to define general working hours for Resource Allocation (e.g., 40 hours/week or 32 hours/week). This setting determines the baseline capacity for resource allocation and scheduling.

Note: If you do not set a general 'Default Capacity' in the 'Allocation Working Hours' section or on the employee card 'Allocation' tab *for all your employees*, *you cannot allocate resources to employees,* as the system requires a defined capacity to create resource records and generate schedules.

Note:

- When configuring the Resource Allocation app, 'Default Capacity' should be set to the most commonly used working hours based on the number

of employees (e.g., If most of the employees work 40 Hours/week > Default Capacity: 40 Hours/week).

- If an employee's working hours *deviate from the default schedule*, you must explicitly define their hours in the **Allocation** tab (Employees > Open an Employee Card > Allocation Tab). This ensures accurate time tracking and proper allocation of hours for tasks, projects, or billing purposes.
    - If an employee's working hours align with the standard schedule already defined in the Resource Allocation settings, you can leave the Allocation tab empty (Employees > Open an Employee Card > Allocation Tab). This ensures the system automatically applies the default working hours for that employee that you set in the Default Capacity.
- ***Working Days:*** The setting defines the days of the week when employees are available for work (e.g., Everyday, Weekdays, Weekdays and Saturdays), which directly impacts resource scheduling and capacity planning. Defining company working days ensures the Resource Allocation app schedules employees only on operational days, preventing assignments on non-working days (e.g., Sundays in a weekday-only schedule).

Note: The system highlights non-working days, based on the majority of employees' days off, to prevent accidental scheduling on those days. If an employee works during these highlighted periods (e.g., weekends), the hours worked will still be accurately reflected in reports. Check the employee's allocation details (Employees > Open an Employee Card > Allocation Tab) to verify. In the list view, the total hours (including non-standard hours, such as weekends) are visible. However, in the '*Resource view*', these hours are not displayed in the table.

➢ *Individual Employee Customization:* Working hours/days and allocation hours can be tailored for each employee as needed.

- *Working hours:* Employees > Open an employee card > Work information tab > Working hours field

- *Allocation hours:* Employees > Open an employee card > Allocation tab

- ***Enable Calendar Event:*** When selling services on an hourly basis, you are essentially selling the time of a designated employee to a client. To manage this effectively:

  - *Calendar Event Creation:* If you enable this option, when you sell a specific number of employee hours, a calendar event is automatically generated in the system. This event marks the allocated time as reserved, ensuring the employee's schedule reflects the sold hours and appears booked.

  - No Additional Planning for Dedicated Employees: This prevents the planned/reserved time from being consumed by other tasks, projects or meetings, maintaining accurate tracking of the committed hours.

➢ *Purpose:* This setup ensures that the sold hours are exclusively reserved for the client's project, avoiding scheduling conflicts and ensuring that the employee's availability is correctly represented in the calendar.

Timesheets App General Settings

The **Timesheets** app enables time tracking for tasks, projects, and support tickets, supporting billing and performance analysis.

Key General Settings:

- **Billing:**

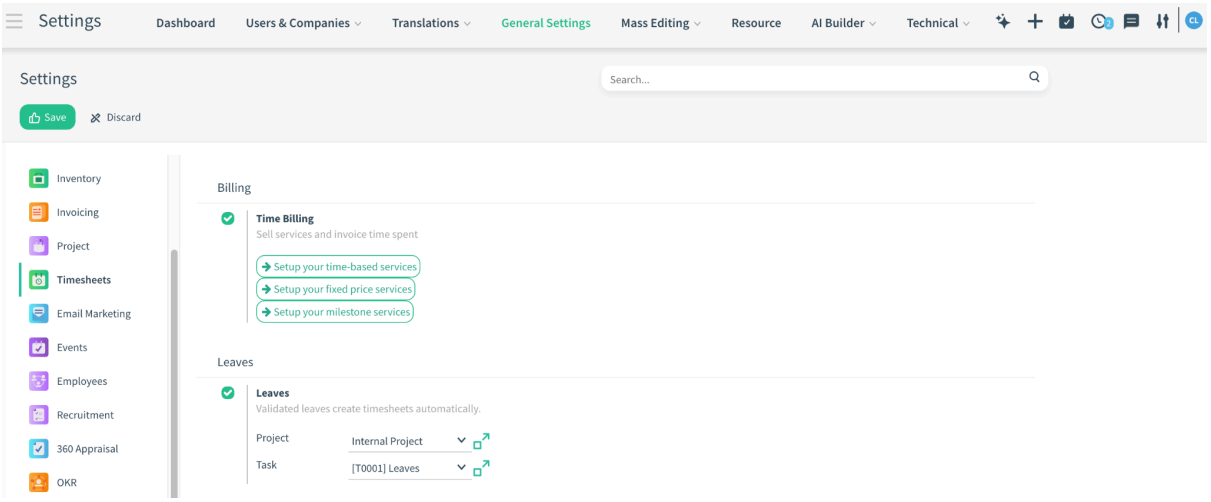
  - ***Time Billing:*** Check the box for 'Time Billing' to enable selling services and invoicing based on time spent, as tracked in timesheets (timesheet-based), on fixed price (ordered quantities), milestones. In CloudOffix, products sold through the Sales app must be configured correctly for the billing model. The Timesheets

app supports three distinct billing approaches, each requiring separate product configurations:

- *Time-Based Services (Timesheet-based):* Products configured as Timesheet-based link directly to timesheets. Hours/days logged in the Timesheets app are associated with these products, allowing you to track and invoice based on time spent (Invoice based on > Timesheets on tasks).
    - *Why Configure Separately:* These products are set up to pull data from timesheets, ensuring that only the time logged is invoiced. This is ideal for 'pay-as-you-go' models where clients are billed based on actual usage.
- *Fixed Price Services (Ordered Quantity):* Products with a fixed price are invoiced based on a predefined quantity or amount, regardless of the time spent (Invoice based on > Ordered quantities).
    - *Why Configure Separately:* Fixed price products are not linked to timesheets. They are used for services sold as a set rate, ensuring predictable revenue without tracking hours.
    - *Additional Benefit:* Timesheets can still be maintained for customer information purposes, and timesheet journals can be sent to the customer. However, since the invoice is generated immediately after the sales order, it is created based on the ordered quantity from the start.
- *Milestone-Based Services:* Milestone-based products are invoiced when specific project milestones or deliverables are achieved (Invoice based on > Milestones (manually set quantities on order)).
    - *Why Configure Separately:* These products allow invoicing at key project stages, regardless of time

spent, which is useful for long-term projects with defined deliverables.

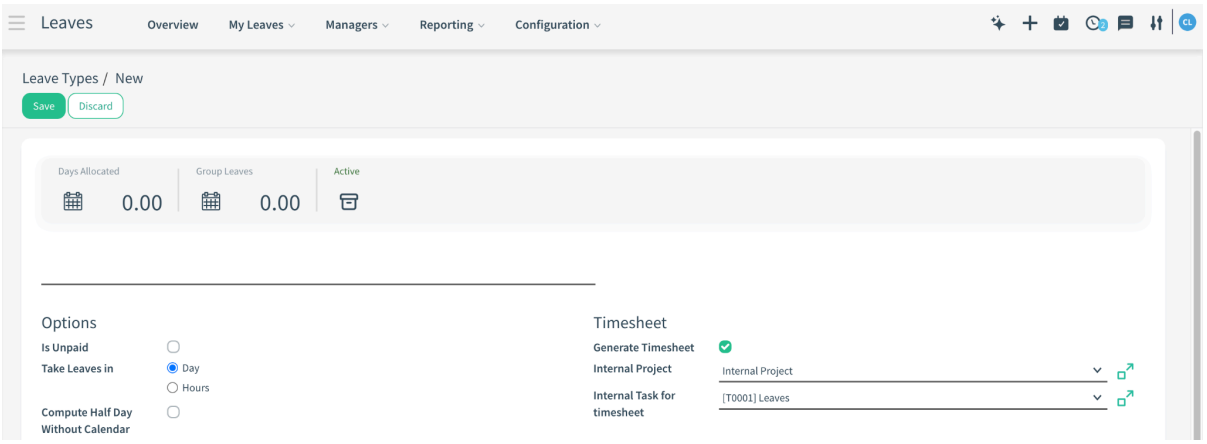
- **Leaves:**
    - ***Leaves:*** Automatically generates timesheet entries for validated employee leaves, linking them to a predefined internal project (e.g., 'Internal Project') and task (e.g., '[T0001] Leaves'). This ensures leave hours are tracked within the Timesheets app. Ensures all employee time, including leaves, is accounted for in timesheets, providing a complete picture of employee availability and workload.



Enabling the '*Leaves*' setting requires the installation of the 'Leaves' app in HR Cloud, while enabling '*Time Billing*' requires the '*Sales*' app in Sales Cloud.

Note: Enabling '*Leaves*' setting will allow you to select the option to generate timesheets for a leave request that you created. This means that once the '*Leaves*' setting is enabled, administrators can configure custom leave types in the ***Leaves*** app to automatically create timesheet entries upon validation. For each leave type (e.g., 'Sick Leave,' 'Parental Leave'), the '*Generate Timesheet*' option can be activated, specifying which project and task (e.g., 'Internal Project' and '[T0001] Leaves') the timesheet entries will be logged under. This ensures that leave hours are systematically recorded in the Timesheets app, and linked to a non-billable internal project/task for accurate tracking. This flexibility allows

businesses to ensure that all leave-related time is accounted for with minimal manual entry.



Practical Example: A software company uses the 'Leaves' app in HR Cloud and enables the 'Leaves' setting. They create leave types 'Vacation,' 'Sick Leave,' and 'Parental Leave in *Leaves* > *Configuration* > *Leave Types*, enabling 'Generate Timesheet' for each and linking them to 'Internal Project' and '[T0001] Leaves.' When an employee submits a 2-day 'Vacation' request (16 hours), the validated leave generates a timesheet entry under '[T0001] Leaves.' Similarly, a 1-day 'Sick Leave' request (8 hours) creates a separate entry, allowing the company to track leave types distinctly in timesheet reports and adjust resource allocation accordingly.