2025

Project Cloud: Project App Configuration and Workflow Guide

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This document provides a comprehensive guide to the **Project App** in CloudOffix, detailing the Configuration menu, its menu items, critical fields, and an example workflow for creating and managing a project with tasks, subtasks, assignments, and dependencies.

For user access rights refer to the Access Rights Management for Project Cloud Applications: [Access Rights Management for Project Cloud Applications]

For more information about configuring Project Cloud please refer to the Project Cloud General Settings Configuration Guide: [Project Cloud General Settings Configuration Guide]

Configuration Menu Overview

The **Configuration menu** in the Project App, accessible under **Project App > Configuration**, is available to users with **Project / Manager** access rights. This menu allows administrators to customize settings and manage key components of project management. Below are the primary menu items and their functions.

Configuration Menu

1. **Settings**
    - *Purpose*: Central hub for enabling/disabling features and setting global preferences.
    - *Key Options*:
        - *Timesheets Management* > *Timesheets*: Enable to allow time tracking on tasks/projects and support tickets (if Helpdesk Cloud is available).
        - ***Important***: *Enabling* the '*Timesheets*' option will *install* the *Timesheets* App and *disabling* this option will *uninstall* it.
2. **Stages**
    - *Purpose*: Customize stages for project tasks (e.g., Pending, In Progress, Development, Design, Analysis, Done).

- *Functionality*: Define stage names, sequence, and associated email templates, (e.g., customer ratings or customized emails when a task reaches a specific stage to send automatically).

3. **Project Templates**
    - *Purpose*: Create reusable templates for projects to streamline setup.
    - *Functionality*: Templates can predefine tasks, milestones, and settings, ideal for recurring project types.
    - *Integration with Sales*: Can be linked directly to a service product. When the product is added to a sales order, the selected template is automatically applied upon order confirmation, instantly generating a fully configured project with all predefined structure and settings.
4. **Risk Categories**
    - *Purpose*: Define categories for risks (e.g., Technical, Financial, Resources).
    - *Functionality*: Default categories are provided, but custom ones can be added to classify risks during project planning.
5. **Risk Response Categories**
    - *Purpose*: Define response types for risks (e.g., Mitigate, Avoid, Accept).
    - *Functionality*: Allows standardized responses to risks, which can be linked to tasks/projects.
6. **Project Statuses**
    - *Purpose*: : Define statuses for projects to track their progress in the dashboard view (e.g., Pending, In Progress, Completed, On Hold, Cancelled).
    - *Functionality*: Displayed in the project dashboard for quick status tracking and filtering. Configurable statuses allow for clear visibility of project states across the organization.
7. **Activity Types**
    - *Purpose*: Create activity types to schedule activities for projects and tasks (e.g., custom activity types can be created to match organizational processes (e.g., ‘Client Review’ or ‘Quality Check’)).
    - *Functionality*: Enables scheduling of specific actions for users, such as sending an email or scheduling a meeting. Activities can be

assigned to users, with due dates and reminders, improving task coordination.

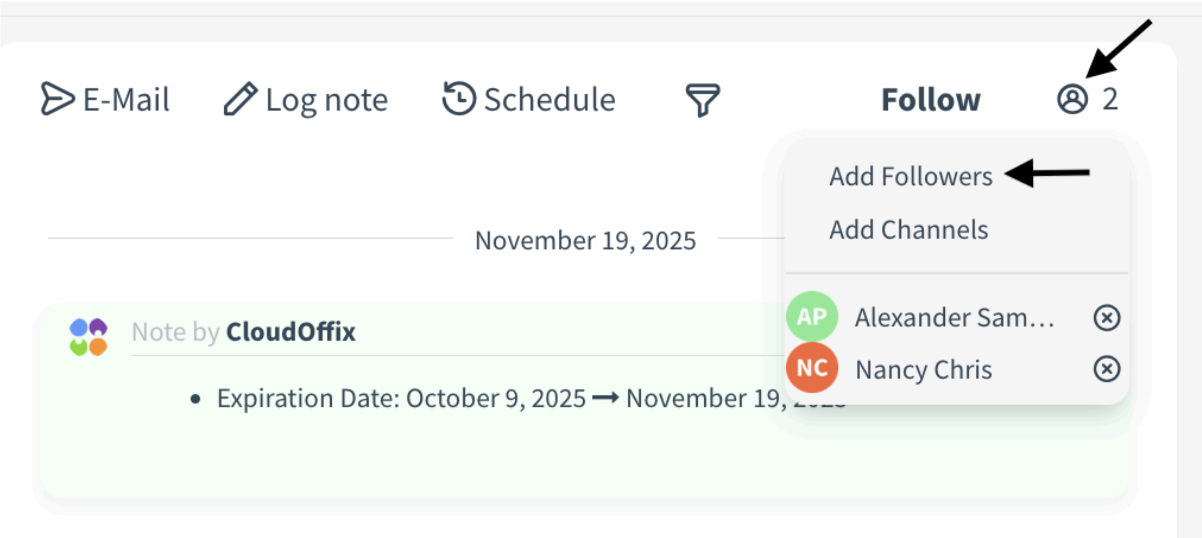
8. **Tags**
    - *Purpose*: Create tags to categorize and filter tasks (e.g., IT, Marketing, Urgent).
    - *Functionality*: Tags can be applied to tasks for better organization and filtering. Multiple tags can be assigned to a single task, enabling flexible categorization.
9. **All Milestones**
    - Purpose: Centralized view of all milestones across every project in the system.
    - Functionality: Lists every with its project, target date, related tasks, and progress status.
        - Enables managers to monitor key deliverables company-wide in one place.
        - Supports filtering, grouping, and searching (e.g., group milestones by target dates).

Menu Items

- *Dashboard*:
    - *Purpose*: Provides an overview of project-related metrics and statuses in a kanban view.
    - *Functionality*: Displays key project information, such as project statuses (e.g., Pending, In Progress, Completed), open task numbers, customer rating, customer name, project email alias.
- *Tasks*:
    - *Purpose*: Central hub for viewing and managing tasks.
    - *Functionality*: Displays tasks in Kanban, List, Calendar, or Gantt views, with filtering options (e.g., by project, tag, or assignee).
        - *My Tasks*:
            - Purpose: Displays tasks specifically assigned to the logged-in user. Filters tasks to show only those where the user is an assignee or follower.
            - Functionality:
                - Project / User: Can view/edit their own tasks, tasks in public projects, or tasks where they are the assignee.

- **Project Privacy: Visible by all employees**
  - When a project's privacy is set to **Visible by all employees**, every user with at least **Project / User** access rights can see the entire project, including all tasks, milestones, documents, and chatter – regardless of whether they are assigned to any task or added as a follower *from the backend (can view the Project app)*. Users with Employees/Employee access rights can access the project from the *portal interface (My Account)*, not from the backend (*cannot* view the Project app if they do not have at least Project / User access rights).
- **Project Privacy: 'On invitation only' – Task Assignee**
  - With the **On invitation only** setting, simply adding someone as a follower on a task is not enough to grant visibility. A user only gains access when they are explicitly listed in the **Assignee** field of the task. In this case, the user can only see the specific task(s) they are assigned to (they appear under **My Tasks**). They cannot see the project itself, any other tasks, or the overall project structure.
- **Project Privacy: 'On invitation only' – Project Follower**
  - If a user is added as a **follower on the project itself** (not just on

individual tasks), they are granted full visibility: they can see the entire project, all tasks, milestones, documents, and chatter, even if



they are not assigned to any task.

- Project / Manager: Can view/edit/create all tasks across all projects.

- *Backlog*: (Available if Sprint Management is enabled)
  - *Purpose*: Centralized repository for tasks requiring refinement before sprint planning.
  - Functionality: Displays all tasks marked for refinement.
- *Sprints*: (Available if Sprint Management is enabled)
  - *Purpose*: Manages sprints for agile development, allowing task assignment to fixed time cycles (e.g., 1-4 weeks).
  - *Functionality*: Supports sprint planning by moving tasks from the Backlog to the Sprint.
- *Risks*:
  - *Purpose*: Tracks and manages risks associated with projects.
  - Functionality: Lists all risks associated with the projects

- *Reporting*:
  - *Purpose*: Provides analytics and insights for project and task performance.

- *Functionality*: Accessible only to Project / Manager users, providing actionable data for project oversight and optimization.
- *Task Analysis*: Offers customizable metrics (e.g., number of tasks, progress, days to deadline) and provides multiple view options, including pivot, bar chart, pie chart, and line chart, for comprehensive task analysis.

Critical Fields

The following fields are critical for effective project setup and management:

Critical Fields - Project Setup

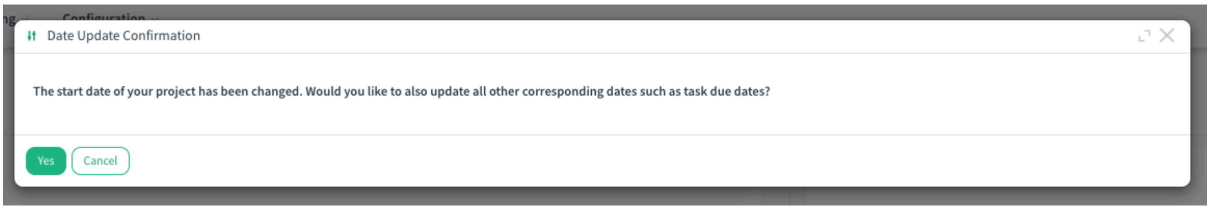
- *Project Name*: Unique identifier for the project, visible in reports and dashboards.
- *Allow timesheets*: When enabled, users can log time entries directly against the project and its tasks.
- *Require tasks on timesheets*: Only visible when **Allow Timesheets** is enabled. When checked, users **must** link a timesheet entry to a specific task.
- *Use milestones*: Enables the **Milestones** tab on the project. Allows defining key checkpoints with due dates and linked tasks. Milestones appear in Gantt charts and dashboards.
- *Is template*: Marks the project as a **template**. Template projects are hidden from regular views and used as blueprints for new projects. Enable this during creation to predefine tasks, stages, risks, or settings for recurring project types (e.g., 'Onboarding Template').
    - When a project is created from a Project Template, the system automatically preserves the assignee defined on each task in the template and uses the Start and Due Dates from the template as reference points. These dates are then intelligently shifted to match the new project's timeline (based on the project's start date).
- *Settings*:
- *Privacy*: Options include:
        - On invitation only: Only invited followers (for the general project, not individual tasks) or task assignees can access.

    - Visible by all employees: Everyone with Project / User access rights can access the project *from the backend (can view the Project app)*. Everyone with Employees/Employee access rights can access the project from the *portal interface (My Account)*, not from the backend (*cannot* view the Project app if they do not have at least Project / User access rights).
    - Visible by following customers: Everyone with Project / User rights can access the project from the *backend (can view the Project app)*. Everyone with Employees/Employee access rights can access the project from the *portal interface (My Account)*, not from the backend (*cannot* view the Project app if they do not have at least Project / User access rights).
      - If the website is activated, portal-enabled customers can view and collaborate.
- *Billable*: Marks the project as billable, automatically applying to tasks unless overridden. Linked to Sales Orders if integrated with Sales Cloud.
- *Timesheet details*:
  - *Ordered quantity*: Total hours **sold** to the customer via the **Sales Order**
  - *Consumed quantity (billable)*: Total **billable hours logged** via timesheets on this project/task.
  - *Consumed quantity (unbillable)*: Total **non-billable hours logged**.
  - *Remaining quantity*: **Ordered Quantity − Consumed Quantity (billable)**. Shows how many **billable hours are left** before the sold amount is fully consumed.
  - *Invoice based on*: Displays the invoicing policy from the **Service Product** (e.g., Ordered quantities or Timesheets).
    - Thanks to CloudOffix's fully integrated all-in-one structure, the direct link between the Sales Order and the Project is always preserved. This seamless connection makes the invoicing model of the sold service product (ordered

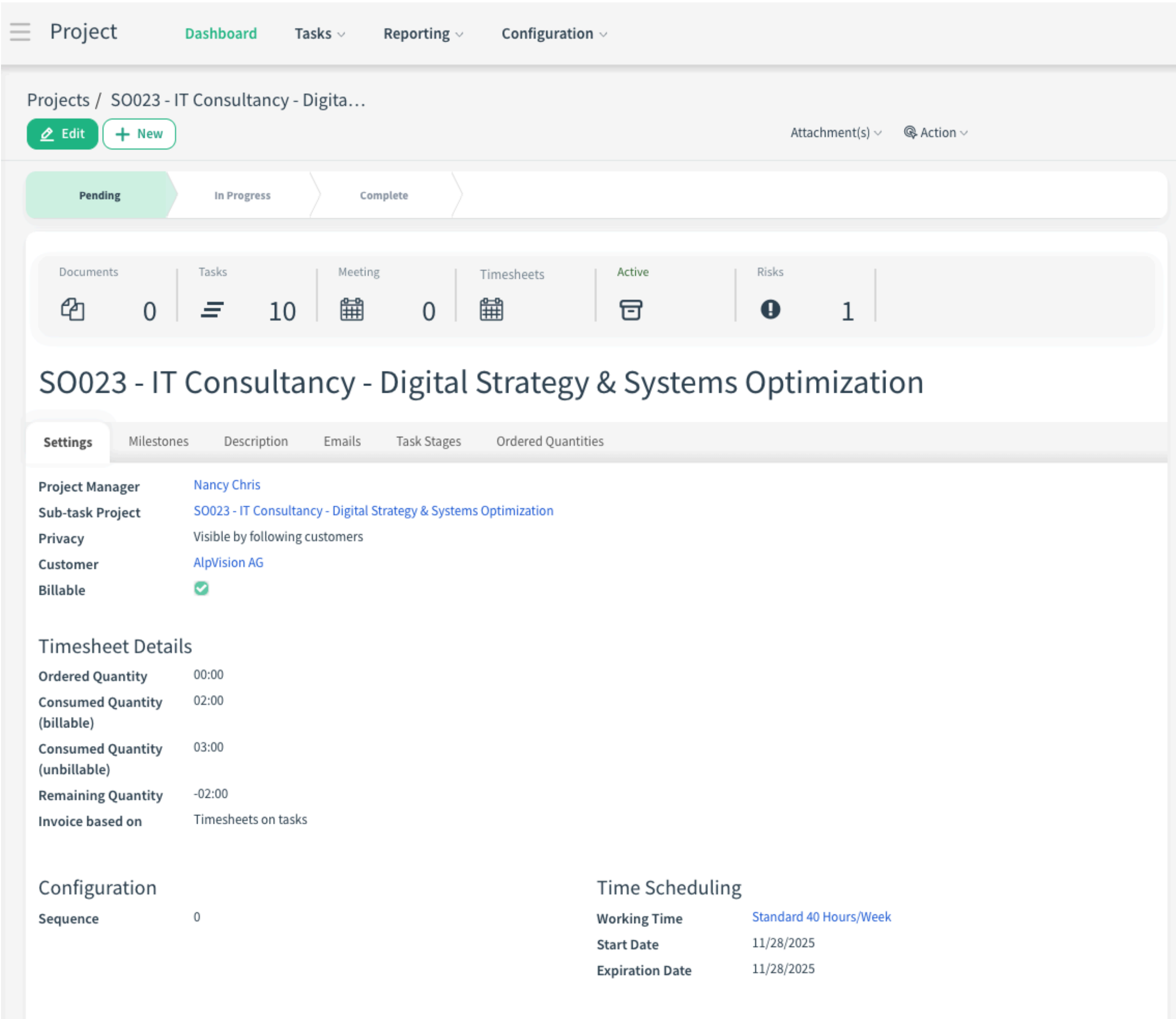
quantity/fixed-price vs. pay-as-you-go/timesheet based) automatically carried over to the project. That is why the Timesheet Details widget on the project/task form instantly reflects the correct approach — showing 'Ordered Quantities' for prepaid services and 'Timesheet based' for pay-as-you-go services — giving everyone a clear, real-time picture of sold, delivered, and remaining hours without ever leaving the project.

    - *Working Time*: Timetable working hours to adjust the Gantt diagram report.
    - Start and Expiration date: Define the project's official Start and Expiration (End) date.
        - If you later change the project's Start Date, the system automatically prompts you: 'Do you want to shift all task dates accordingly?'
        - Choosing Yes → every task's start and due dates are shifted by the same offset while preserving the original duration and relative timing you have defined before.
        - It automatically calculates the expiration date for the project.
        - Choosing Cancel → only the project dates change; task dates remain untouched.
- *Milestones*: Define key checkpoints with due dates and related tasks.
- *Email Alias*: Automatically creates tasks from emails sent to the alias, enhancing collaboration.
- *Task Stages*: Create and define task stages for projects. You can customize stages both globally (via Configuration which is a Project / Manager view) and per project during project creation or editing. This allows each project to have its own workflow stages tailored to its specific needs (e.g., 'To Do → In Progress → Review → Done' for development projects, or 'Draft → Client Review → Approved → Published' for content projects).

- *Ordered Quantities Tab*: Shows the linked sales order if the project is created from a sales order. Additionally, it lists ongoing service purchases related to the project.



Project Creation



Critical Fields - Creating a task

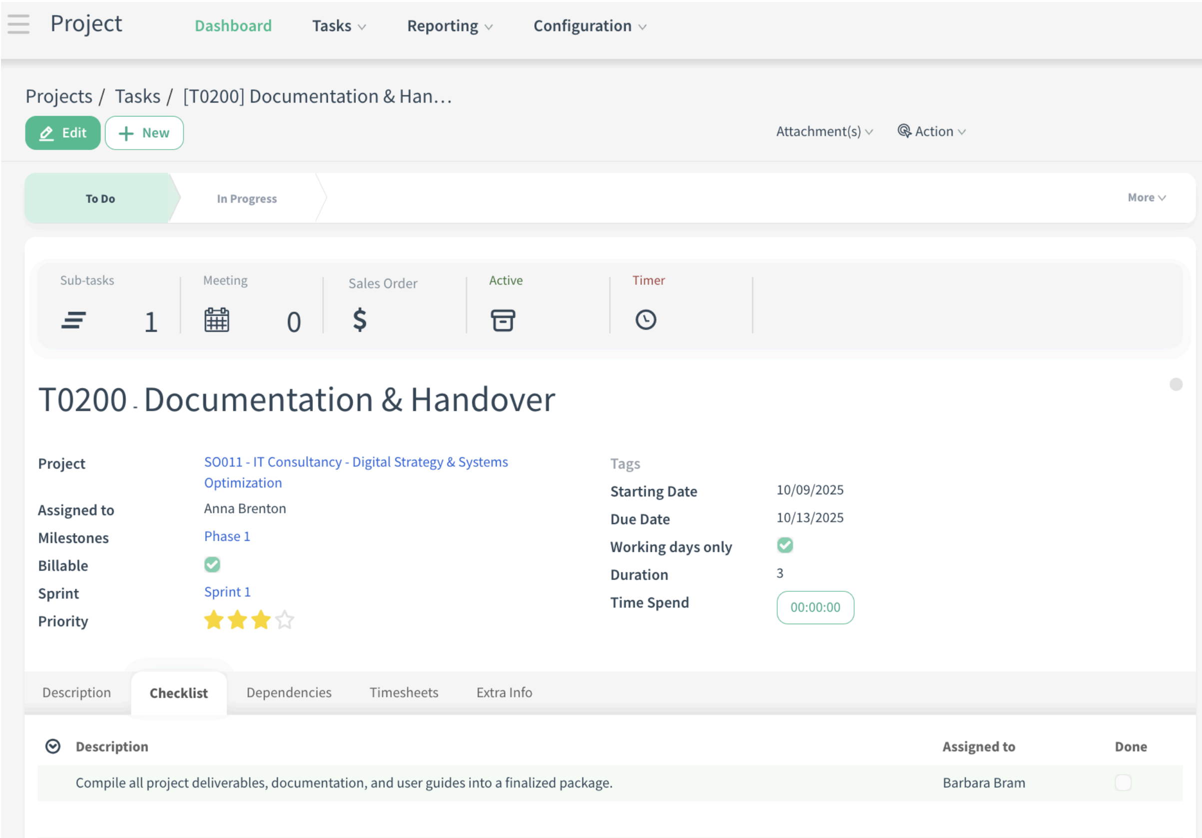
- **Project:** Links the task to a specific project.
- **Assigned to:** The user responsible for completing the task.
- **Milestones:** Links the task to a project milestone (only visible if Use Milestones is enabled on the project). Useful for tracking progress against key deliverables.
- **Billable:** Inherits from the project by default. However, it can also be defined per task.
- **Sprint:** Appears only if Sprint Management is enabled. Assigns the task to a sprint for agile planning.
- **Starting Date:** Planned start date of the task. Used in Gantt chart view and scheduling calculations. The date automatically updates on the task record when you drag and drop or extend/shorten the task bar in the Gantt chart, ensuring seamless synchronization between visual planning and task data.
- **Due Date:** Planned deadline.
- **Working days only:** When checked, Duration is calculated excluding weekends and public holidays (based on the company's working calendar). Leave unchecked for calendar days.
- **Duration:** Automatically computed as Due Date − Starting Date (in days). Respects the Working days only setting.
- **Time Spend:** Start/stop timer button. When stopped, the elapsed time is automatically added as a billable or non-billable timesheet line (depending on the Billable flag) in the Timesheets tab. The timer button (on the stat bar, see the screenshot below) only appears when the Timesheets app is enabled.

Task Tabs

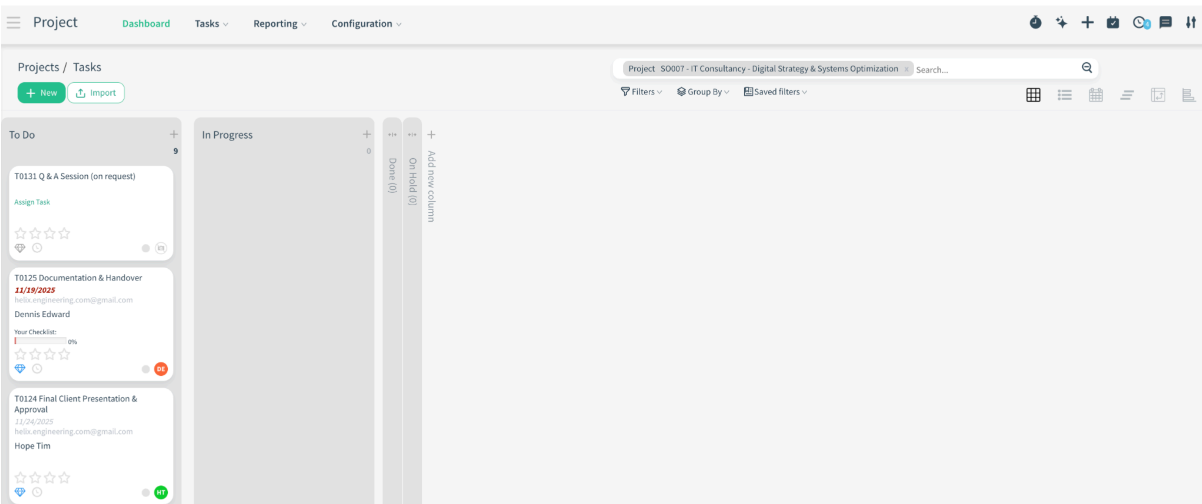
- **Checklist:** Create to-do items within the task. Each checklist item can be assigned to a specific user (even if they are not the main assignee). Progress is shown as a percentage on the task Kanban card.
- **Dependencies:** Define blocking/blocked-by relationships between tasks (e.g., 'This task cannot start until Task X is completed'). Dependencies are visualized in the Gantt view and prevent incorrect scheduling.

- **Timesheets:** Displays the time entries logged against the task (manual entries or via timer).

Task Creation



Task - Kanban View



Critical Fields - Risks

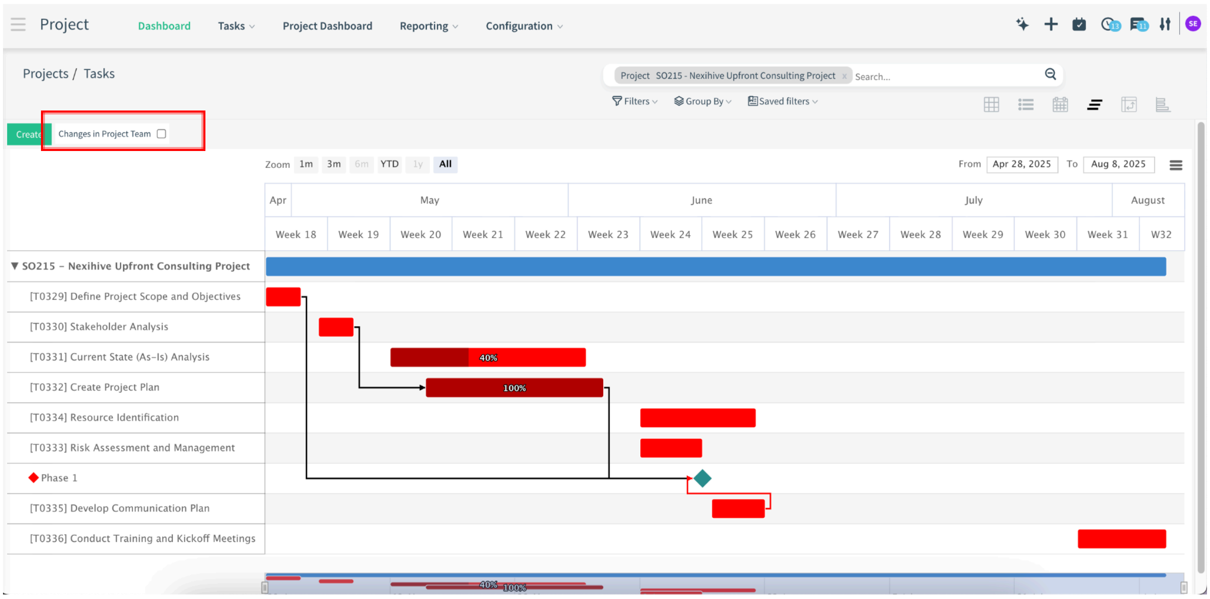
- **Project**: Links the risk to a specific project.
- **Category**: Classification of the risk (e.g., Technical, Financial, Client-Related, Resource). New categories can be created or edited via Project App > Configuration > Risk Categories.
- **Time Impact**: Defines the estimated percentage impact on task duration if the risk materializes.

  • +20 (plus 20) → Affected tasks will take 20 % longer to complete.

  • -20 (minus 20) → Affected tasks will take 20 % shorter

- **Affected Tasks**: Select one or more tasks that would be directly impacted if the risk occurs. When a positive Time Impact is set, the duration of these tasks is extended proportionally in planning views (Gantt chart view). This ensures realistic scheduling and highlights potential delays early.

Task - Gantt Chart View

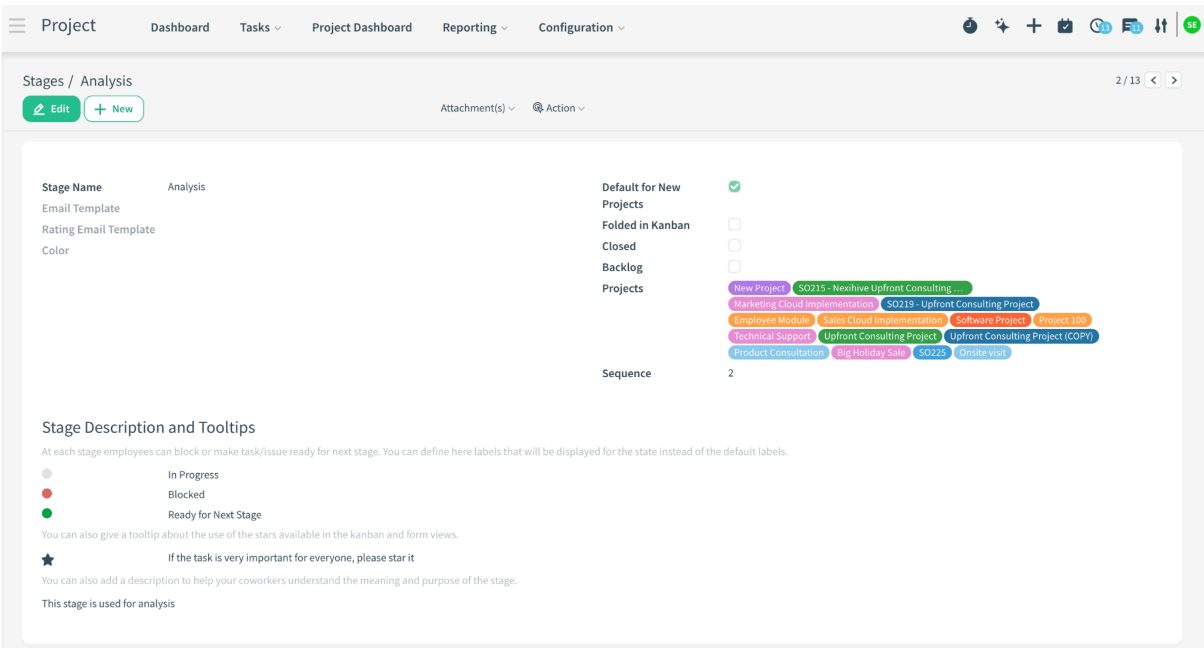


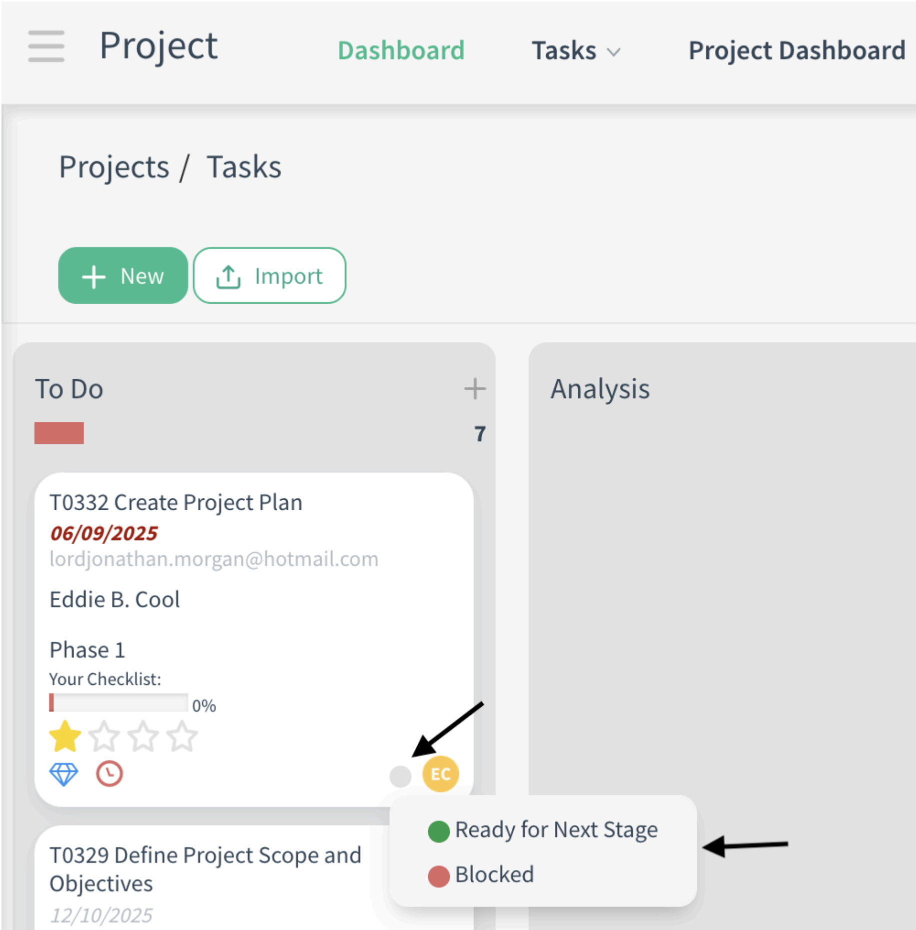
➔ When you tick the checkbox highlighted with the red square, the Gantt chart dynamically displays the impact of the risk if it materializes. Affected tasks are automatically extended (or shortened) according to the Time Impact percentage defined in the risk record.

Critical Fields - Stages

- **Email Template:** The chosen email template automatically sent to the customer when a task moves to this stage.
- **Rating Email Template:** The chosen email template automatically sent to the customer when tasks reach this — provided that (1) 'Customer Ratings on Tasks' option is enabled globally under Project App > Configuration > Settings, and (2) on the project itself, the Customer(s) Ratings option (found in the Settings tab) is set to 'Rating when changing stage'. When both conditions are met, moving a task into a stage with a defined 'Rating Email Template' instantly triggers the email to the customer.
- **Default for New Projects:** When checked, this stage appears automatically in all new projects (recommended for essential stages like 'To Do' and 'Done').
- **Folded in Kanban:** Collapses the stage column in Kanban view.
- **Closed:** Marks the stage as final/completed.
- **Backlog:** Designates this stage as the backlog area in agile/sprint workflows. Tasks here await refinement and sprint assignment.
- **Projects:** Restricts the stage to specific projects only. You can assign or remove stages in two convenient ways: directly while creating or editing a project (via the Task Stages tab), or centrally — if you have Project / Manager rights — by going to Project App > Configuration > Stages, opening the desired stage, and adding/removing projects in the 'Projects' field.
    - If you leave **empty** → the stage is automatically available and visible in **all projects**.
    - If you add one or more specific projects → the stage will only appear in **those selected projects**.
- **Sequence:** Determines the left-to-right order of stages in Kanban view (lower number = leftmost position).
- **Stage Description and Tooltips:** A free-text field where you can write clear instructions and guidelines for the stage. The text appears on the Kanban view on tasks. For example:
        - **In Progress (Grey)**

    - **Blocked (Red)**
    - **Ready for Next Stage (Yellow)**
  - **Star Icon:** Free-text field for the use of the stars available in the kanban/project dashboard view.
    - The star icon (★ / ☆) in Kanban/Project Dashboard view is used to mark projects as favorites.
    - Click the empty star (☆) → it becomes filled (★) and the project is 'starred/favorited'.
    - Starred projects are listed in My favorites located inside the filters under the search bar.
  - **Description:** Free-text field to help people understand the meaning and purpose of the stage.



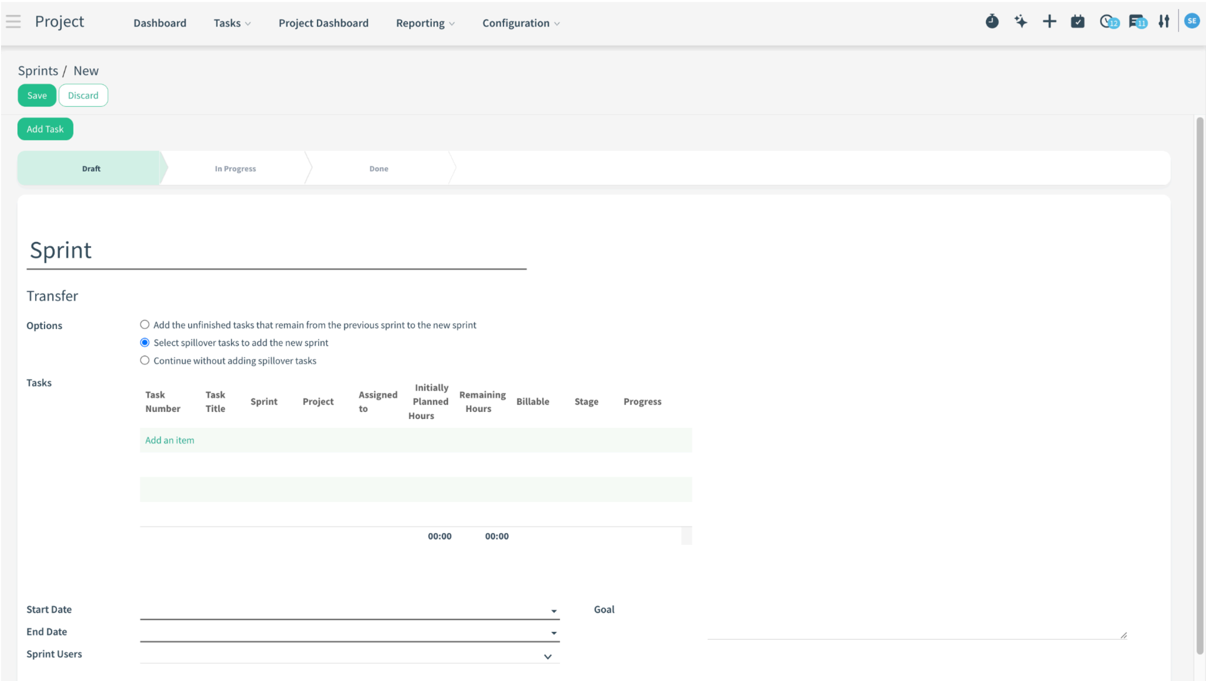


Critical Fields - Sprint and Backlog

Sprint

- **Sprint Name:** Each sprint must have a *unique* name. If a duplicate name is used, the system will display a warning.
- **Transfer Options (when creating a new sprint):**
  - *Add the unfinished tasks that remain from the previous sprint:*
    - Opens a list of sprints that are created.
    - When you choose the sprint(s), the system automatically carries over every task in the sprint(s) that is **not in a stage marked as 'Closed'** in the stage configuration. Example: Tasks in 'To Do', 'In Progress', 'Review', etc. will be brought forward; only tasks in stages marked as Closed (typically 'Done', 'Cancelled') stay behind.
  - *Select spillover tasks to add to the new sprint:*

        - Opens a list so you can manually pick exactly which open tasks (not in a stage marked as closed) from all previous sprints you want to move forward in the new sprint.
    - *Continue without adding spillover tasks:*
        - Starts a clean sprint; no tasks are carried over from previous sprints. Opens a list with all tasks regardless of the sprints and stage of the task.
        - Click the 'Add' button to add your tasks.
    - *Start Date / End Date:* Defines the sprint duration**.**
    - *Sprint Users:* Optional list of team members assigned to the sprint. This field does not affect the visibility of the sprint. Project / User users can view the sprints created based on the project privacy (Visible by all employees, On invitation only), regardless of being added as a sprint user to this field.
        - The Sprint Users field is only an informational field used to indicate who is working on or related to the sprint.
- Example: Assume you created a project with its privacy set to **'On invitation only'.** Within this project, you have three tasks assigned to three different users (Barbara, Hope, and Henry), and all of these tasks are added to the same sprint. In this scenario, each user will be able to access and view the sprint itself. However, within the sprint, **each user will only see the specific task assigned to them**—not the tasks assigned to others. Since the sprint inherits the project's privacy settings (for 'On invitation only', users must either be followers of the overall project or be assigned to at least one task within it to be able to view the sprint).



Backlog

How to create and use the Backlog correctly:

1. (Only for Project / Manager access rights) Create a new stage Project App → Configuration → Task Stages → New
2. Name it (e.g., ‘Backlog’, ‘Product Backlog’, ‘To Refine’)
3. Mark it as Backlog (tick the ‘Backlog’ checkbox)
4. Add the stage to your projects
    - (Preferred way for Project / User access rights, since they cannot view the configuration menu) Either during project creation/editing → Task Stages tab, or
    - (Only for Project / Manager access rights) Under Configuration → Task Stages → open the stage → add the relevant project(s) in the Projects field (Tip: tick Default for New Projects to have it automatically available in every new project).
5. Create tasks directly in this Backlog stage (or drag existing tasks into it on the Kanban view)
6. All tasks placed in a stage marked as Backlog will immediately appear under Tasks → Backlog submenu – your dedicated, centralised view for tasks awaiting refinement and future sprint planning.
    - Project / Manager users can view every backlog task across all projects.

- Project / User users can only see backlog tasks when one of the following conditions is met:
    i. The backlog task is assigned to them,
    ii. The project's visibility is set to 'Visible by all employees',
    iii. They are added as a follower to the project itself (not on an individual task), if the project privacy is set to 'On invitation only'.

Examples of End-to-End Workflow:

Scenario #1

'Mobile App Development for Client ABC'

A sales representative confirms a sales order 'Mobile App Development' service linked to the 'Standard Mobile App Project' template. Upon confirmation, CloudOffix instantly creates a fully structured project with predefined milestones (Discovery & Planning, Design, Development, Testing, Deployment), tasks, subtasks, tags, billable settings, and privacy configured for customer portal visibility.

The project manager opens the project, drags additional tasks from the Backlog into Sprint 1, sets task dependencies (e.g., iOS/Android development cannot start until UI/UX Design is completed), assigns developers, and defines start/due dates with 'Working days only' enabled so durations are calculated accurately. Developers use the built-in timer on their assigned tasks to log time directly into the Timesheets tab (automatically marked as billable), while the QA engineer records testing hours.

When a risk of 'third-party payment gateway approval delay' is identified, the project manager creates a risk with +25 % Time Impact and links it to the affected payment-integration subtasks; the Gantt chart immediately extends those tasks and shifts the forecasted delivery date.

The client follows progress in real time via the customer portal, comments on designs, and receives an automated satisfaction survey once the final 'Deployment' milestone is marked done.

Scenario #2

Internal Project Management

A project manager manually creates a new project titled 'Internal CRM Upgrade 2026' directly in the Project App, setting it as unbillable, enabling timesheets with 'Require Tasks on Timesheets,' activating milestones and sprint management, and choosing 'Visible by all employees' visibility since it is an internal initiative.

They begin by creating the first tasks: 'Analyze Current Pain Points,' 'Map Data Structure,' and 'Design New Dashboard.' For the 'Design New Dashboard' task, they assign the UI/UX designer, set a starting date of 10 January and due date of 24 January with 'Working days only' checked (duration auto-calculated as 11 working days), and create subtasks: 'Wireframes,' 'Prototype,' and 'Stakeholder Review,' each assigned to the same designer. After the initial tasks are in place they define the main milestones with target dates. Each task is then linked to its corresponding milestone.

While creating the 'API Integration' task, they open the Dependencies tab and link it as blocked by 'Data Migration' so the Gantt view correctly reflects that integration work cannot begin until migration is complete. The developer assigned to 'API Integration' opens My Tasks, starts the built-in timer, works for 4.5 hours, stops it, and the time is automatically logged as billable in the Timesheets tab.

Halfway through the project, the team identifies a risk of 'Potential data corruption during migration,' so the project manager creates a new risk, selects the 'Technical' category, sets Time Impact to +30 %, and adds the affected tasks; the Gantt chart instantly extends those tasks by 30 % and pushes the forecasted Go-Live date accordingly.

Throughout the project, team members use checklists inside tasks for granular to-dos, move completed tasks to the 'Done' column in the Kanban view, and monitor progress in the Dashboard.

- ➔ **To see an end-to-end project management in action, please refer to the following video:**

  [Synthesia video linki]