

2025



Project Cloud: Resource Allocation App Configuration and Workflow Guide

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This document provides a comprehensive guide to the **Resource Allocation App** in CloudOffix, covering the Configuration menu, menu items, critical fields, reporting capabilities.

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 Resource Allocation App, accessible under **Resource Allocation App > Configuration**, is available to users with **Resource Allocation / Manager** access rights. 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:*
 - *Default Capacity:* 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.
 - **Important:** 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*.

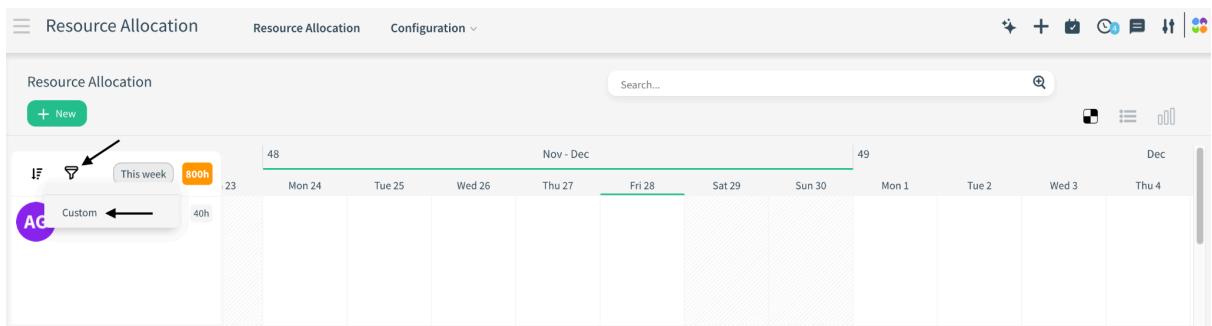
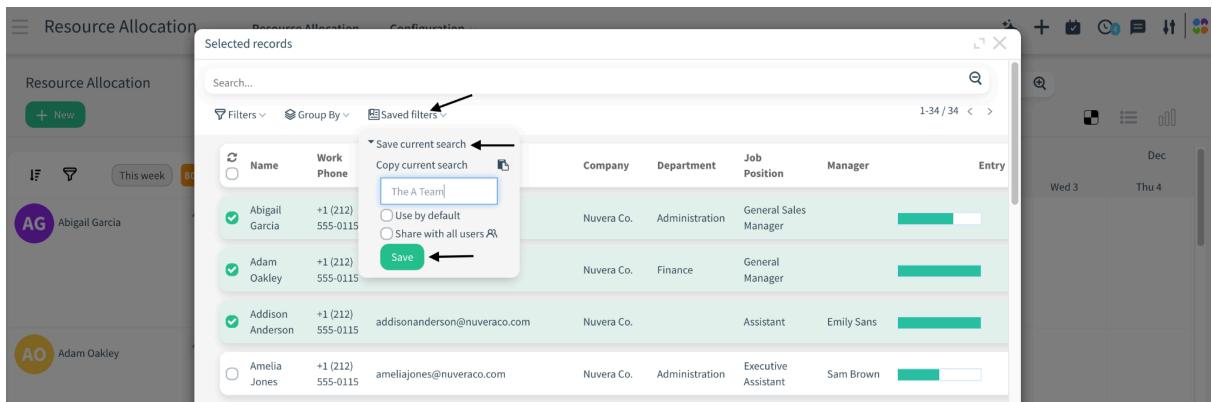
- *Working Days*: Defines the days of the week when employees are available for work, which directly impacts resource scheduling and capacity planning.
- *Enable to Create Calendar Event*: When you sell a specific number of employee hours, a calendar event is automatically generated in the system. This event marks the allocated time as booked on the calendar.

Menu Items

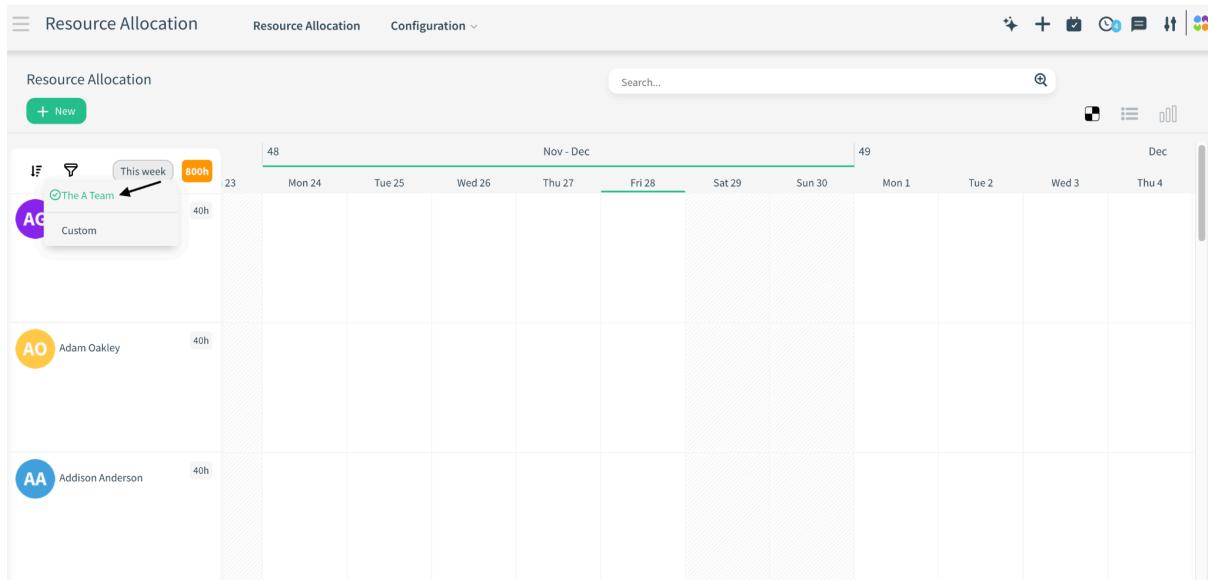
- *Resource Allocation*:
 - *View Options*:
 - *Report View*:
 - Main view, calendar-based resource planning board, when you open the Resource Allocation app. Employees are displayed in rows on the left, while the time axis extends horizontally.
 - By clicking and dragging your mouse on the day(s) you have selected, you can allocate resources to the selected employee on the left side of the screen.
 - You can define and save reusable filters (e.g., 'Development Team – Backend', 'Consulting – EMEA'). Applying a filter instantly restricts the employee list to only relevant/selected individuals, significantly reducing visual complexity.
 - How to create and save a filter?:
 - Click on the 'filter' icon (a little funnel) located above the list of employees on the left.
 - Click on 'Custom'.
 - Choose your employees from the list by checking the box next to their names.
 - Click on 'Saved filters' under the search bar (if not visible, click on the 'magnifying glass' icon which opens more advanced search/filter options).

- Click on 'Save current search' and write the name that you would like to give to your custom filter.
- Click on 'Save'.
- From now on, you can use the filter that you have created. It will be listed under the little funnel icon you have clicked in the beginning.

Custom Filter Creation

Name	Work Phone	Company	Department	Job Position	Manager	Entry
Abigail Garcia	+1 (212) 555-0115	Nuvera Co.	Administration	General Sales Manager	Emily Sans	<div style="width: 80%;"></div>
Adam Oakley	+1 (212) 555-0115	Nuvera Co.	Finance	General Manager	Sam Brown	<div style="width: 80%;"></div>
Addison Anderson	+1 (212) 555-0115	addisonanderson@nuveraco.com	Nuvera Co.	Assistant	Emily Sans	<div style="width: 80%;"></div>
Amelia Jones	+1 (212) 555-0115	ameliajones@nuveraco.com	Nuvera Co.	Administration	Executive Assistant	<div style="width: 80%;"></div>



■ *List View:*

- A simple, classic list view of resource allocations.

■ *Resource Report View:*

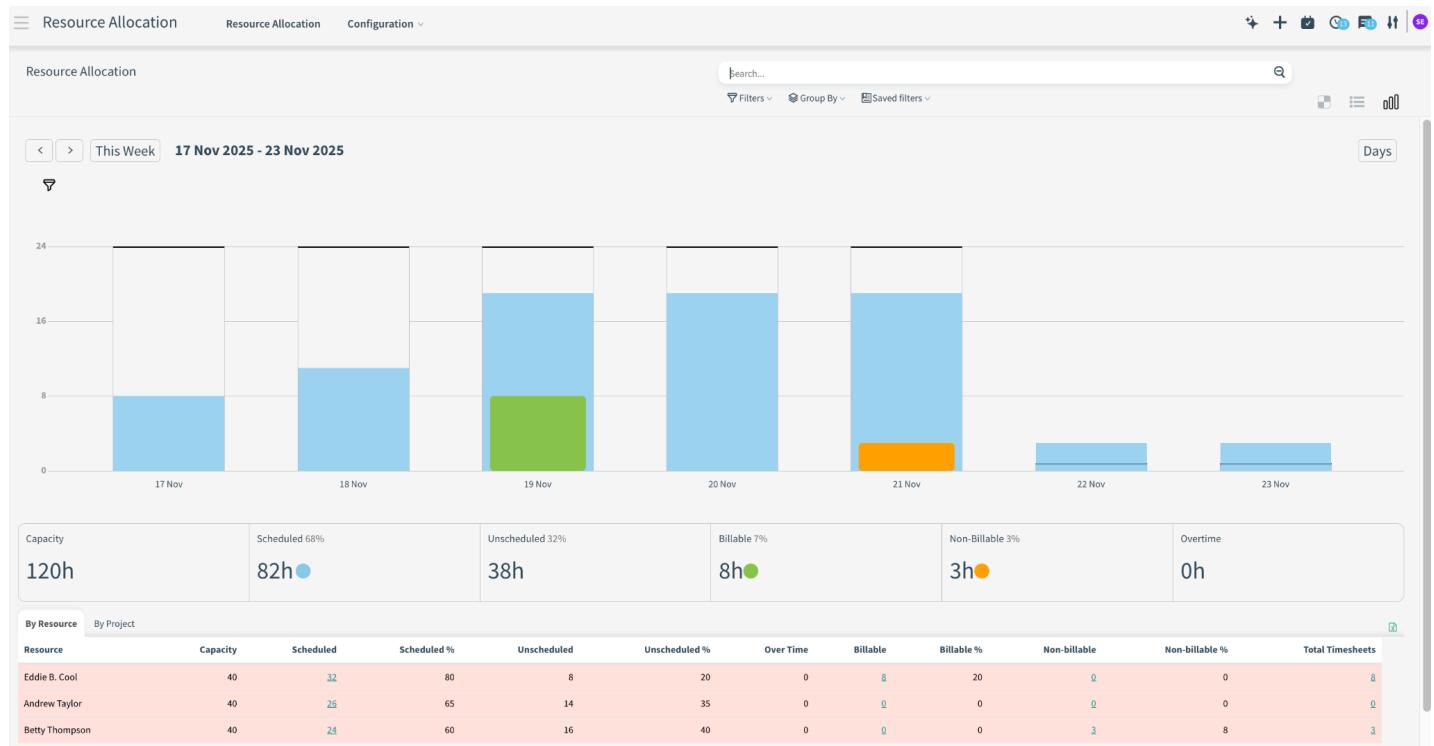
- This is the core operational view of the Resource Allocation App, providing a comprehensive, real-time overview of workforce utilization across the selected period. All key metrics are displayed with consistent colors (e.g., Scheduled → Blue, Billable → Green) for instant recognition.

- *Total Capacity:* Sum of all available working hours of the displayed employees in the selected period.
- *Scheduled:* Hours that have been already allocated. (billable+unbillable)
- *Unscheduled:* Remaining available capacity (Total Capacity – Scheduled hours).
- *Billable:* Subset of scheduled hours that are assigned to billable projects/tasks.
- *Non-billable:* Subset of Scheduled hours assigned to non-billable projects/tasks.
- *Overtime:* Hours scheduled above an employee's standard weekly capacity, calculated using either the employee's default capacity (e.g., 40 hours/week) defined on the general settings or

custom allocation hours defined on their employee card (if set).

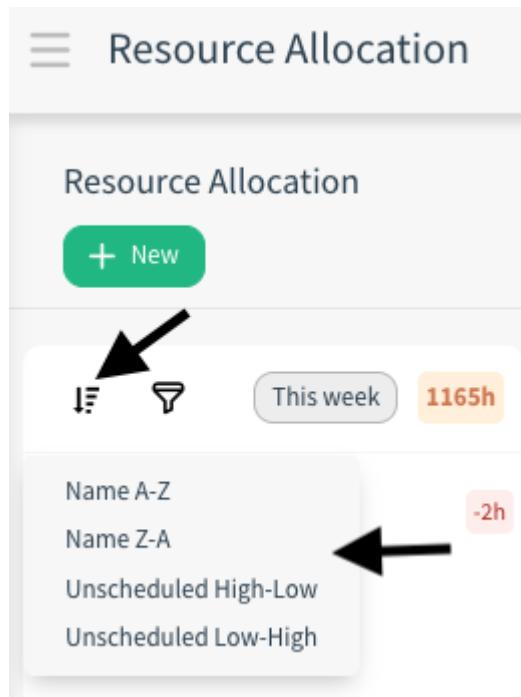
- *By Resource Tab:*
 - Lists every employee with the metrics listed above.
- *By Project Tab:*
 - Switches the perspective to show utilization broken down by project with the metrics listed above.

Note: The Resource Allocation view only applies color-coding (e.g., green for billable, orange for non-billable) after an employee logs a timesheet entry against the allocated task. This ensures the colors always reflect actual logged time rather than just the planned billability of the task.



Sorting

The results can be sorted by unscheduled time—or alphabetically by name (A-Z / Z-A)—to identify available capacity and determine who can take on additional tasks and when.



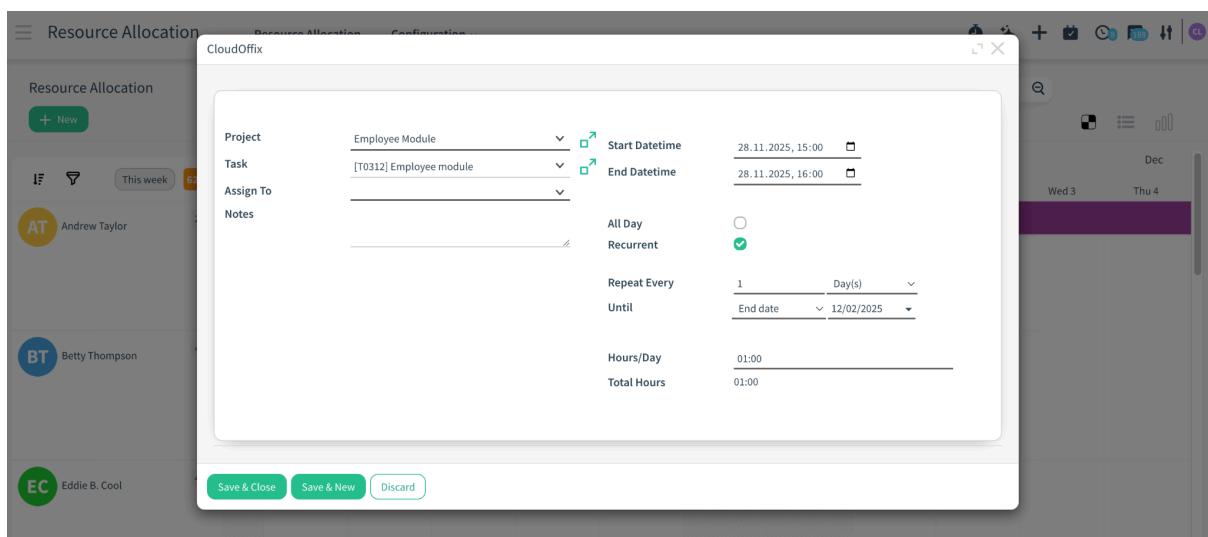
Critical Fields

The following fields are critical.

Critical Fields - Creating a Resource Allocation

- **Project:** The project to which the resource is being allocated.
- **Task:** Links the allocation to a specific task within the project.
- **Assign To:** The employee (resource) being allocated.
- **Start and End Date:** Defines the exact period during which the employee is booked.
- **Hours/Day:** Number of hours per working day the employee will dedicate.
- **Total Hours:** Automatically calculated (Hours/Day × number of working days in the period).
- **All day:** When checked, the allocation automatically uses the employee's full daily working hours.

- **Recurrent:** Enables repeating allocations.
 - **Repeat Every:** Choose daily, weekly, or yearly intervals (e.g., 'Repeat every 1 week'), or set monthly recurrences either on a fixed date (e.g., every 12th of the month) or on a specific weekday (e.g., every second Thursday).
 - **Until:** Choose either:
 - *Number of repetitions* (e.g., repeat 12 times)
 - *Specific end date* (e.g., until 31 Dec 2026)



Notes:

- If 'Enable Calendar Event' is turned on in Resource Allocation App > Configuration > Settings, the allocation will create a real calendar event. In this case, Start Date and End Date include the exact time (e.g., 09:30 – 11:00).
- If the option is disabled, only the date is stored and the system only cares about how many hours per day are allocated – no specific time slot is reserved.
- Even if you create a calendar event from 14:00–17:00 (3 hours), the system will use the **Hours/Day** value you entered as the actual allocated effort.
- The calendar visually blocks the exact time slot you chose (useful for meetings, workshops, etc.).
- **Capacity planning, utilisation reports, and billable hours** are always driven by **Hours/Day** and **Total Hours**, not by the calendar block duration.

Example: When a resource allocation is created with a specific time slot — for example, 28 November 2025, 14:00–16:00 — and Hours/Day is set to 1 hour, the Resource Allocation resource view and all related reports will display and consume only 1 hour of capacity, based solely on the Hours/Day and Total Hours values. However, if 'Enable Calendar Event' is active, the Calendar App will still block the full 14:00–16:00 window on the employee's calendar, correctly showing them as unavailable during that period.

In short: the calendar shows when the employee is reserved, while Hours/Day determines how much effort is actually consumed and reported.

- The calendar blocks the real time slot (great for visibility), but the system always reports and consumes capacity based on the Hours/Day and Total hours value — not the duration of the calendar event.
 - ◆ Always make sure Hours/Day reflects the actual effort you want to allocate and bill/report; the calendar time is only for scheduling visibility.

Note: Durations of up to 1 (one) hour are displayed with the same height to maintain visual consistency. This design choice prevents minor time differences from creating unnecessary visual noise and ensures that shorter entries remain easily distinguishable and readable at a glance.

The screenshot shows a Gantt chart for the period from November 24 to December 5. There are three main tasks: '10:30 - Sales Cloud Implementation' (363h), '14:00 - Employee module' (23h), and '14:00 - Employee module' (3h). Resource assignments are shown for Andrew Taylor (AT) and Betty Thompson (BT). The interface includes a search bar and filter options.

The screenshot shows a detailed task configuration dialog. The task is for the 'Employee Module' (Task ID: [T0312]) and is assigned to 'Betty Thompson'. The task is set to repeat every 1 day(s) from 28.11.2025, 14:00 to 28.11.2025, 16:00. The 'Recurrent' option is checked. The 'Notes' section is empty. The 'Save & Close' button is visible at the bottom.

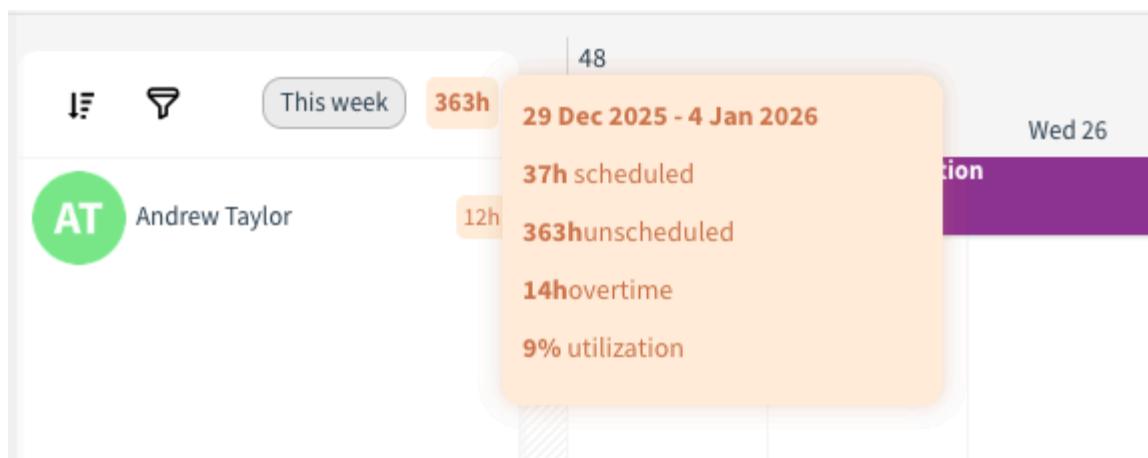
The screenshot shows a weekly calendar view for week 48 (Nov 23 to Nov 29, 2025). A recurring event for 'Employee Module' is shown from 14:00 to 16:00 every day. The 'Attendees' section lists Sarah Edward and Betty Thompson, with a note about Everybody's calendars. The 'Responsible' section lists Betty Thompson. The right side of the screen shows a calendar for November 2025.

→ The example above means that: On the Calendar app, Betty Thompson will be shown as busy every day between 14.00-16.00, starting from 28 November until 4 December. On the Resource Allocation app, the

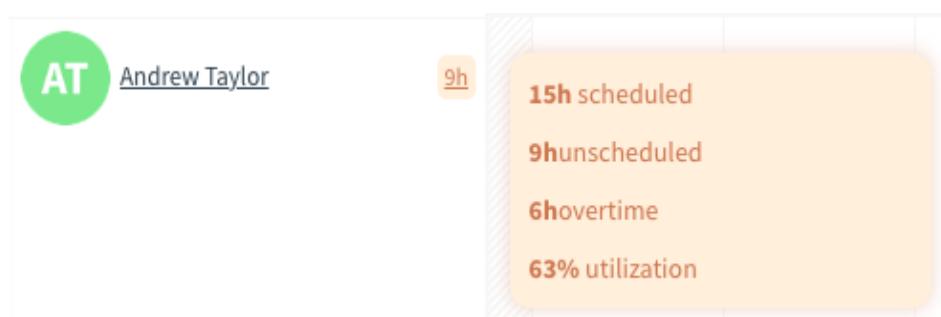
resource view will display that she is reserved for 1 hour every day, starting from 28 November until 4 December.

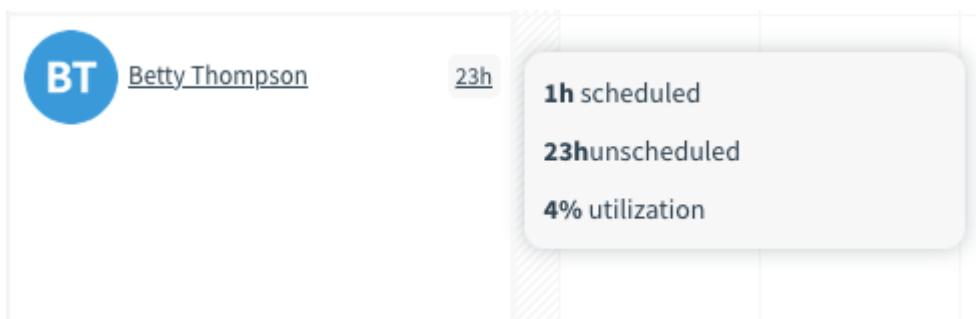
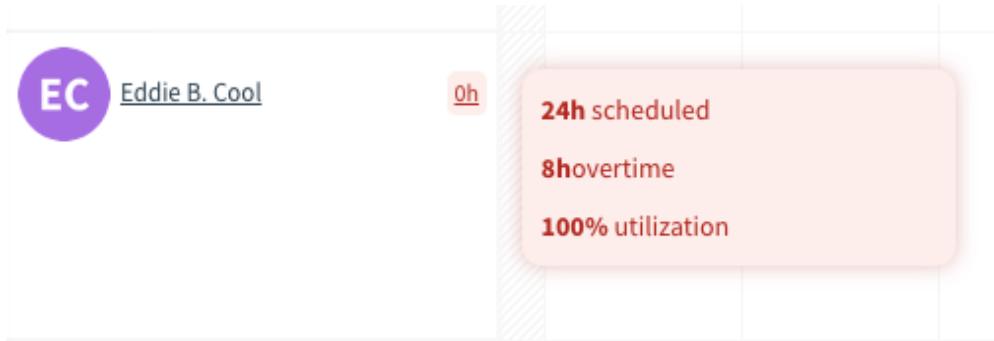
- To view the resource allocations on the Calendar app, either click 'Everybody's calendars' or write the person's name on the search bar under the attendees section.

Note: Each individual's scheduled/unscheduled hours, overtime or utilization rate for the selected period are displayed next to their name, while an aggregated team total is presented at the top (e.g., see below for team total).



Note: The scheduling insights are *color-coded*. When there is both overtime and remaining unscheduled time (utilization below 100%), the totals are shown in orange. If overtime exists with no remaining unscheduled time (utilization %100 or above 100%), the totals are shown in red.





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

[[Project Cloud](#)]