

Resourcecloud — First Steps

Your instance is installed and the setup wizard is done. This guide walks the **rc_admin** — the administrator account created in the wizard — through the handful of things worth doing before the rest of the company logs in: connect real file storage, decide on AI features, build the org chart, and get comfortable with the day-to-day screens.

Overview

Plan for about 30–45 minutes, most of it one-time setup. Do the steps in order — storage before anyone uploads a file, the org structure before you invite people, since new users are assigned to a team as they are created. Right after the storage, download the audit key (step 2).

1 • Orient yourself

Log in, meet the navigation, find the Admin area.

2 • Storage

Point uploads at your S3 bucket instead of local disk.

3 • AI (optional)

Smarter search and the chat assistant, or skip it for now.

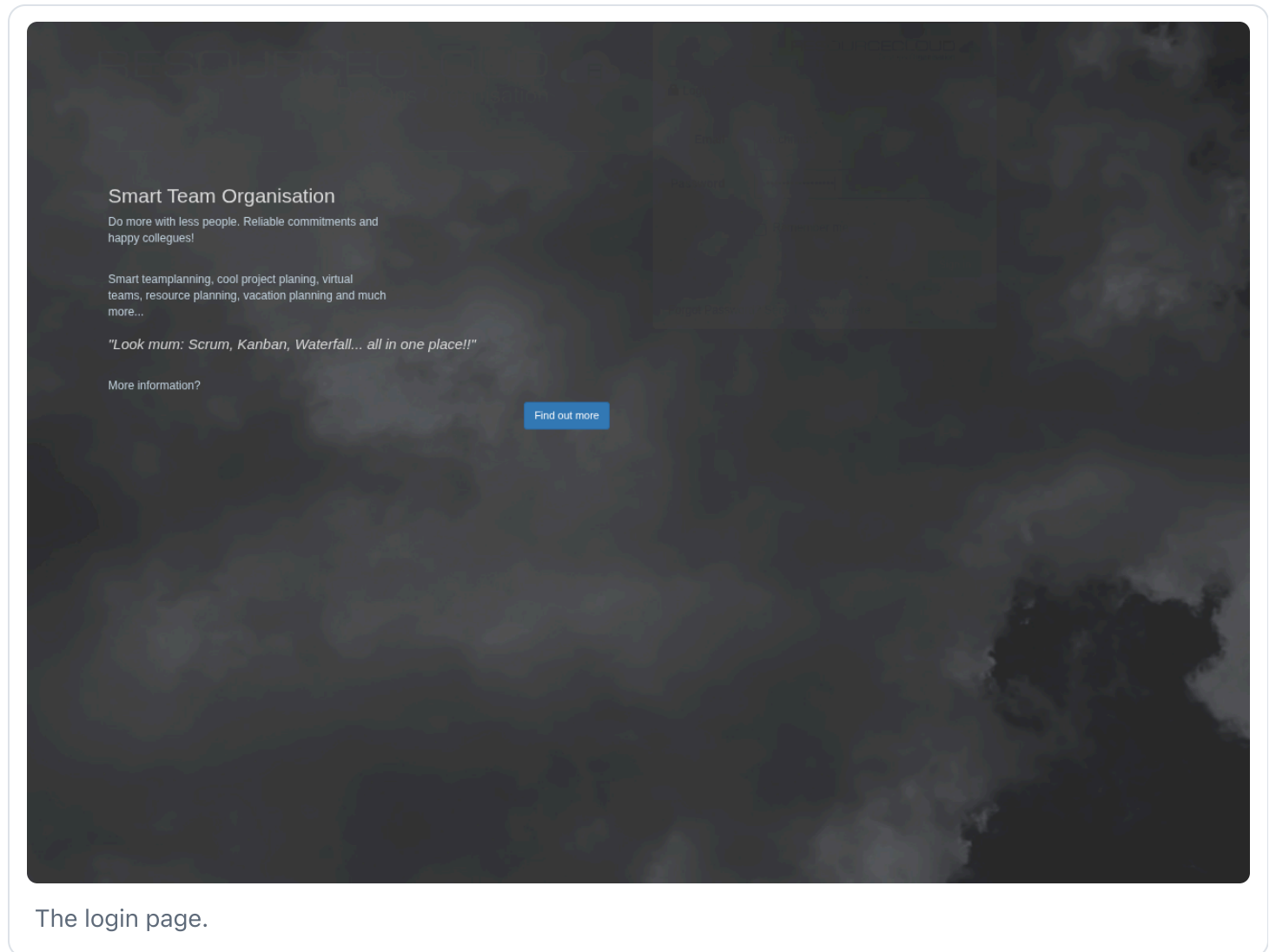
4 • Organisation

Areas, departments, teams, and the people in them.

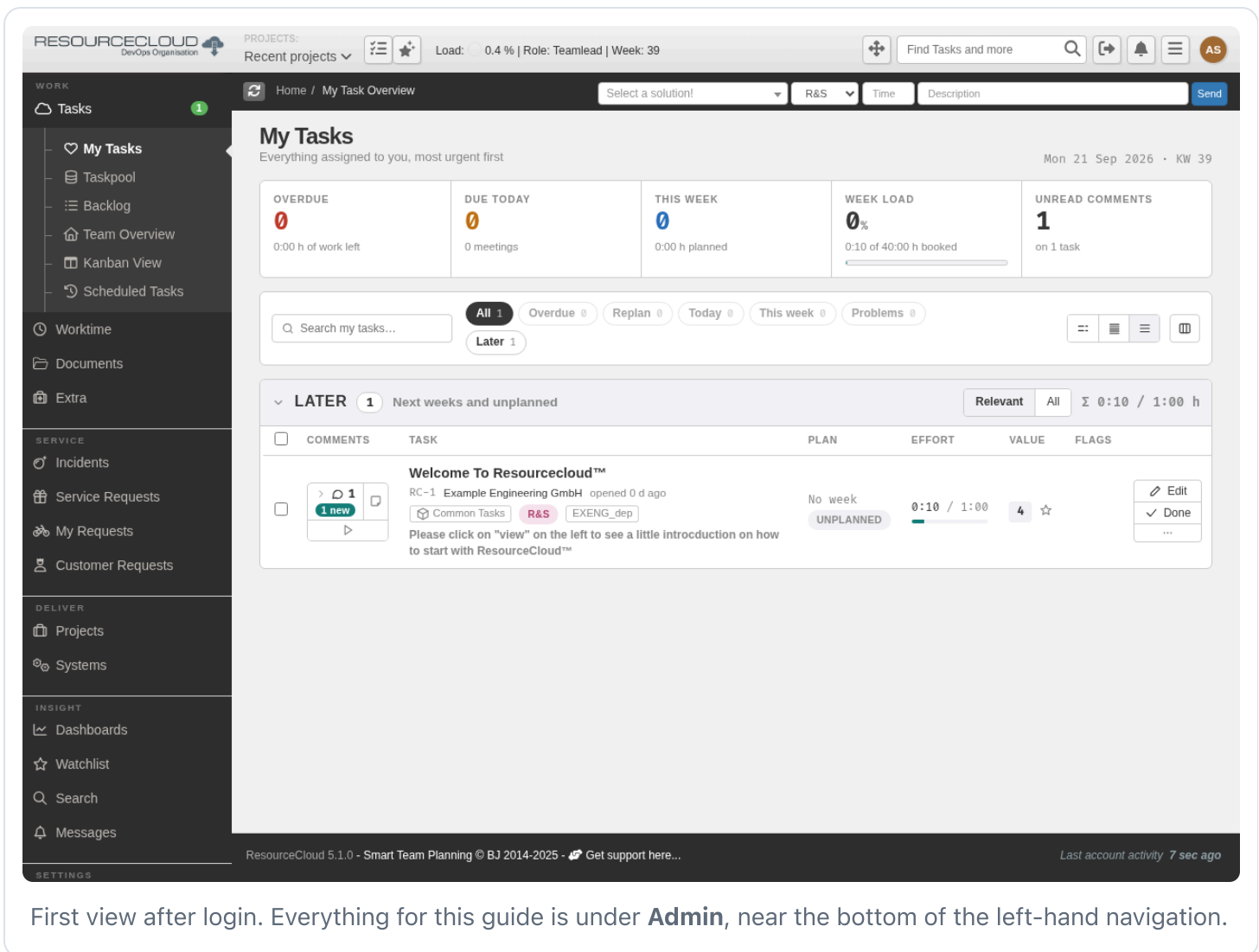
This guide assumes the installation itself is already done — see **Installing Resourcecloud** for Docker, VM and Kubernetes setup and the first-run wizard. If `/basic_setup` still greets you instead of a login page, finish that first.

1 • Log in and get your bearings

Sign in with the login name the wizard derived for your account (first letter of the first name plus the family name, lower case — *Anna Schmidt* → `aschmidt`) and the password you chose. The login field is labelled “Email” but takes the login name, not an address.



You land on **My Tasks** with one welcome task already assigned to you in your default team.



The navigation is organised top to bottom roughly the way you will use it day to day:

Group	What's there
My Tasks / Pool / Backlog	Your own work, unassigned tickets, and the sprint backlog.
Projects / Kanban / Sprints	Project overviews, Kanban boards, sprint planning and time tracking.
Reports	Load and performance reporting (if enabled — see Roles).
Admin	Org Management and Global Settings — everything in this guide lives here. Only visible to administrators.

Everything in the steps below is reached through **Admin → Global Settings** or **Admin → Org Management**.

2 · Connect external storage (S3)

Until you switch it on, every attachment, inline image and avatar is written to the web container's local disk — and is lost the moment that container is restarted or rescheduled. Do this before anyone (including you) uploads something you care about.

You will need, from your storage provider: a private bucket, an access key/secret with read/write/delete on it, the endpoint URL (empty for Amazon S3) and region, and optionally a key prefix.

- 1 **Open Admin → Global Settings → Data Management** and find the *External Storage* card.
- 2 **Switch on “Use external S3 storage.”** The connection fields appear.
- 3 **Fill in Endpoint URL, Bucket, Region, Access Key and Secret Key.** Set **Path-style addressing** on for MinIO, Ceph and most European/self-hosted providers; off for Amazon S3.
- 4 **Press Test Connection.** A successful test writes, reads and deletes a probe object and reports it. If the bucket does not exist yet, the test offers to create it.
- 5 **Press Save Storage Settings.** The secret key is stored encrypted and never shown again — leave it blank on later saves to keep the current one.

External Storage

Where uploaded files are stored

By default, all attachments are written to the local filesystem of this server (`userdata/attachments`). That is fine for a classic installation, but a **container loses every uploaded file when it is restarted**.

Switch this on to store all attachments in an external, S3-compatible object store instead. Any provider works — Amazon S3, MinIO, Ceph, Wasabi, Backblaze B2, Hetzner, Strato, or your own self-hosted store. Files already on the local disk stay readable, and can be copied into the bucket with the migration button below.

Use external S3 storage



Endpoint URL

Leave **empty for Amazon S3** — the region determines the endpoint there.

MinIO: `https://minio.example.com:9000` | Wasabi: `https://s3.eu-central-1.wasabisys.com`

Hetzner: `https://fsn1.your-objectstorage.com` | Strato: `https://s3.hidrive.strato.com`

Bucket

Region

Must match the endpoint. The region is part of the request signature, so a wrong one is rejected before the bucket is ever looked at.

Hetzner: `fsn1`, `nbg1` or `hel1` — the same prefix as the endpoint host.
AWS: the bucket's own region. MinIO / Ceph: any value, as long as it matches what the server was configured with (`us-east-1` is the usual default, and is what Resourcecloud sends when this is left empty).

Access Key

Secret Key

Key Prefix (optional)

All objects are stored below this prefix, so several instances can share one bucket.

Path-style addressing



On (`host/bucket/key`) for MinIO, Ceph and most self-hosted stores. Switch off for Amazon S3, which uses `bucket.host/key`.

Create the bucket if it is missing



Applies when you press *Test Connection*. You can also leave this off — if the bucket turns out to be missing, the test offers to create it.

Connected to bucket 'rescloud-files' - write, read and delete all succeeded.

Move existing files into the bucket

There are **0** file(s) on the local disk of this server. Copying them into the bucket makes them survive the next container restart. The local copies are kept, so this can be repeated safely.

Hint: Save the settings before migrating. Downloads always check the local disk first, so older attachments keep working after the switch.

Global Settings → Data Management → External Storage, after a successful Test Connection.

Verify end to end: attach a file to the welcome task in *My Tasks*, then check the bucket for a new object. A half-filled configuration silently falls back to local storage rather than losing uploads, so always confirm the test passed rather than assuming it did.

Then: download the audit key

Resourcecloud keeps an audit log of who changed what. Nobody can edit it, and a hash chain protected by a secret key makes any later change detectable. Resourcecloud creates that key itself and keeps it in the bucket you just connected — but **you need a copy of your own**. Without it the log cannot be verified after a restore, a move to another bucket or a replaced key. As RC Admin, you are responsible for that copy.

- 1 **Open Admin → Audit Log.** A yellow notice says *Download the audit key and keep it safe*.
- 2 **Press Download key** and store the file where you keep important secrets — a password manager or a vault, not only on the server and not in the database backup.
- 3 **Press “I have stored it.”** The notice disappears and the page shows who confirmed the copy. Only an RC Admin can confirm; the Auditor role may download too.

Do this now, while nothing depends on it. If you set `RC_AUDIT_KEY` yourself in the deployment, no notice appears — keep that value with your other secrets instead. More: *Resourcecloud audit log guide* (`docs/auditlog/index.en.html` , also a PDF).

3 • Turn on AI features (optional)

Two features are AI-backed: semantic search / task-duration estimation, and the AI chat assistant. Both work with a keyword fallback if you leave this off, so it is safe to skip for now and come back later.

- 1 **Open Admin → Global Settings → External Services → AI Service Configuration.**

- 2 **Choose a provider.** Any OpenAI-compatible endpoint works — OpenAI, Gemini, a local Ollama server, or Anthropic for the chat model specifically (Anthropic does not offer an embeddings endpoint, so pair it with OpenAI, Gemini or a local model for embeddings).
- 3 **Enter the API key, base URL, embedding model and chat model,** switch on the features you want, and press **Save AI Settings**.

AI Service Configuration

Help

Connects ResourceCloud to an OpenAI-compatible AI service for task estimation, the chat assistant and document search. Without one, estimation falls back to keyword matching. Provider examples and details are under [Help](#).

Enable AI-based Estimation

☐

Enable AI Chat Assistant

☐

API Key

API Base URL

Used for chat and, unless overridden below, for embeddings.

Embeddings Base URL (optional)

Only when embeddings run on a different service than chat (e.g. chat on OpenRouter).

Embeddings API Key (optional)

A local Ollama needs no key, but enter any value (e.g. `ollama`).

Embedding Model

Changing the model or embeddings endpoint re-embeds all 0 passages (about 1 minute without a GPU).

Chat Model

Proxy (optional)

Leave empty for no proxy (or the global proxy, if configured).

Reranker Base URL (optional)

Improves the order of retrieved passages before the assistant answers. Leave empty for no reranking.

Reranker API Key (optional)

Reranker Model (optional)

A local llama.cpp reranker ignores this.

Local-only mode

☐

When on, every AI endpoint must be on your own network; others are refused on save.

Document Search — “Ask your Documents”

Lets people ask questions about uploaded documents; answers only use files they can access. **Document content is sent to the AI endpoint configured above.**

Enable Document Search

☐

Index documents from the last

days

☒ indexes everything.

Documents per run

The indexer runs every five minutes.

Index status: 0 searchable, 0 waiting, 0 without readable text, 0 failed — 0 passages stored.

Re-index everything discards every stored passage and costs a full run against the AI service.

Meeting Protocols, Agendas and Blog Entries

Lets the assistant answer from meeting protocols, agendas and blog entries, with the usual visibility rules. **The text is sent to the AI endpoint configured above.** Switching this off deletes what has been indexed.

Enable Protocol, Agenda and Blog Search

☒

Record index: 0 meeting protocols, 0 meeting agendas, 0 blog entries — 0 passages stored.

AI Service Configuration. With nothing configured, a keyword-based fallback is used automatically.

Prefer nothing to leave the server? If your deployment includes the bundled `ollama` service, point the base URL at `http://ollama:11434/v1` instead of an external provider — document text then never leaves your infrastructure.

4 · Build your organisation

The wizard already created one company, one default area/department/team, and you as its team lead. This is where you shape that into your real org chart before inviting anyone else.

Areas, departments & teams

Open **Admin → Org Management**. The structure is a ladder — company → areas → departments → teams — with one tab per level (*C-Levels, Areas, Departments, Teams*).

RESOURCECLOUD
DevOps Organisation

PROJECTS:
Recent projects

Load: 0.4 % | Role: Teamlead | Week: 39

Find Tasks and more

AS

WORK

Tasks

Worktime

Documents

Extra

SERVICE

Incidents

Service Requests

My Requests

Customer Requests

DELIVER

Projects

Systems

INSIGHT

Dashboards

Watchlist

Search

Messages

SETTINGS

Work Orga

Admin

Org Management

Task Management

Global Settings

Organisation Management

Here you can change worker, teams, departments, etc.

UsersVirtual TeamsTeamsDepartmentsAreasC-LevelsCompanyAccess RolesMail In

All Teams

Add new Team

The CEO Office reports to the company, not to an Area, and is managed on the Company tab.

No.	Company	Area	Department	Short Name	Team	Team Leader	Rate	Bearbeiten
4	Example Engineering GmbH	EXENG_area	EXENG_dep	EXENG_team	Default Team EXENG_team	Anna Schmidt	100 €	Edit

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The Teams tab. One default team from the wizard, led by you. Use **Add new Team** for more, and the Departments / Areas tabs above it to rename or extend the levels above.

You do not need the full structure decided on day one — start with the teams you know you need, and add areas or departments later as the company grows into them.

Adding users

Still in Org Management, switch to the **Users** tab. Right after the wizard it lists just you.

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DevOps Organisation

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WORK

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Here you can change worker, teams, departments, etc.

Users

Virtual Teams

Teams

Departments

Areas

C-Levels

Company

Access Roles

Mail In

All Users

Add User

Show 10 entries

Search:

ID	Username	Team	Company	Name	Primary Role	Notifications	h/W	Last Login	Login Count	State	Edit
1	aschmidt	EXENG_team	Example Engineering GmbH	Anna Schmidt	Teamlead	On	40	21.09.2026 15:17	1	Active	Edit

Showing 1 to 1 of 1 entries

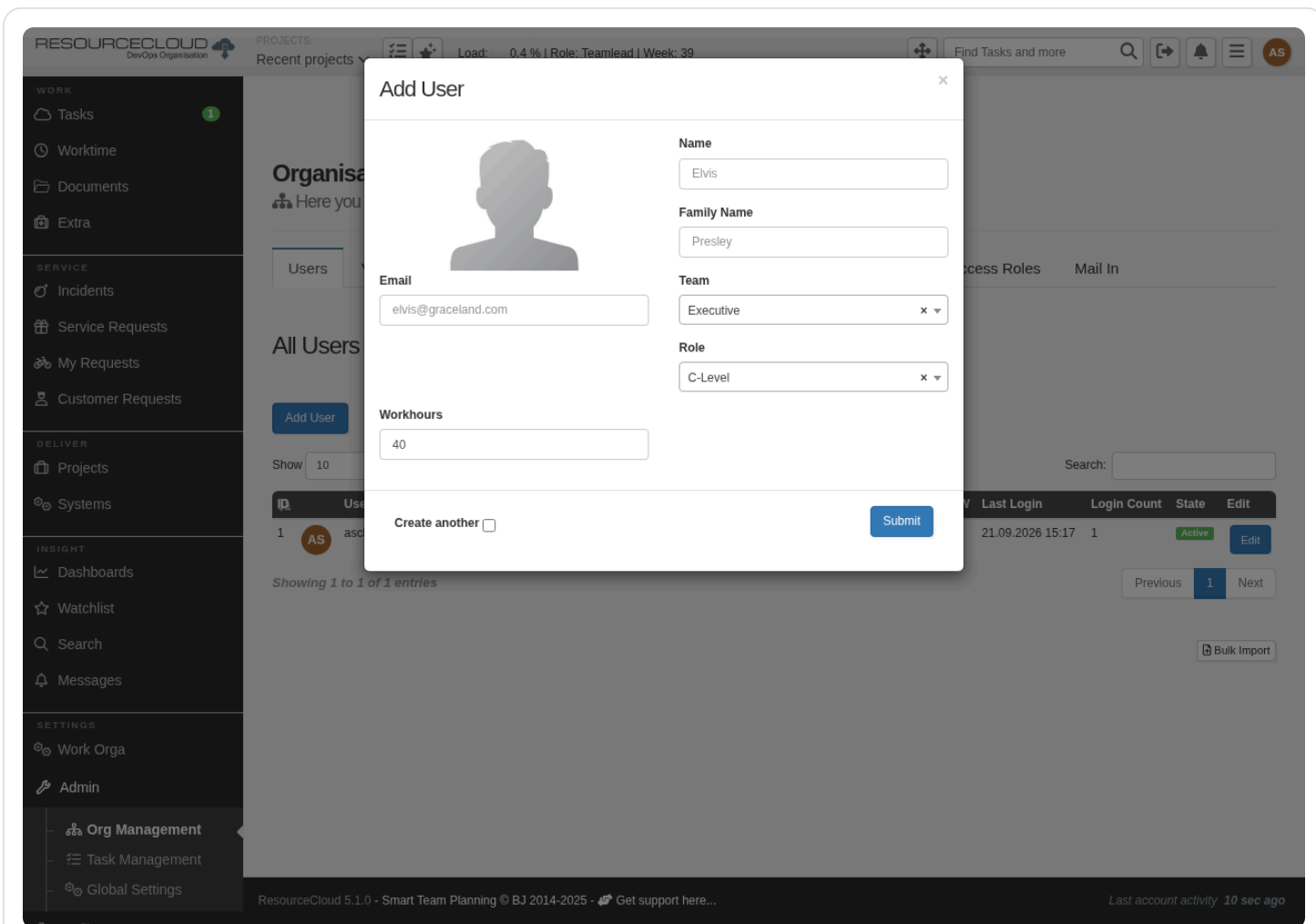
Previous 1 Next

Bulk Import

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The Users tab.

Use **Add User** for one person at a time, or **Bulk Import** at the bottom of the tab for many at once.



Name, e-mail, team, role and weekly work hours. Tick *Create another* to keep the dialog open for the next person.

- Resourcecloud generates a **one-time password** shown to you once after submitting — the new user chooses their own on first login. Hand it over through a channel you trust (not plain email, ideally).
- **Workhours** per week feed capacity and load planning — set them realistically, especially for part-timers.
- Assign each person to the **team** they actually work in; it can be changed later, but tasks and load figures follow the team, so getting it right up front saves cleanup.

Roles & access

The **Access Roles** tab in Org Management lists every role with a description of what it can do — Worker, Teamlead and more. Role decides what a person may see and edit, so pick deliberately rather than defaulting everyone to the widest role.

Two related switches live in **Global Settings → Configuration** and are off by default: *Enable User Reports* and *Enable User Load Tracking*. In many countries the reports feature needs works-council approval before you turn it on — check locally rather than enabling it reflexively.

5 · Familiarise yourself

With storage, AI and the org chart in place, take ten minutes to click through the everyday screens before other people arrive — it makes support questions in week one much faster to answer.

Screen	What it's for
My Tasks	Your personal queue — everything assigned to you, across every project and team.
Pool	Unassigned work waiting to be picked up or assigned within a team.
Kanban	Board view of a project or team's work, drag-and-drop between columns.
Backlog / Sprints	Plan and run sprints; move backlog items into a sprint, track burn-down.
Projects	Project-level overview: tasks, capacity, and (once configured) the customer-facing portal.
Time tracking	Logged hours per task/project, feeding load and capacity views.
Comments	Attached to tasks; comments marked external notify the customer by e-mail (needs the mail server configured — see docs/install-guide.html §6.3 if that step was skipped during installation).

A good way to learn the shape of the system without touching real data: work the welcome task the wizard created for you end to end — comment on it, attach a file (to confirm storage really is wired up), move it across a Kanban board, and close it.

Go-live checklist

Before you send the first invitation to a colleague:

- ☐ External S3 storage connected and *Test Connection* passed
- ☐ Audit key downloaded, stored with your secrets, and confirmed with *I have stored it* (Admin → Audit Log)
- ☐ Mail server configured and a test mail received (set up during installation, or under Global Settings → External Services)
- ☐ AI features decided — on with a provider, or deliberately left off
- ☐ Areas / departments / teams reflect at least your first real team, not only the wizard defaults
- ☐ Roles reviewed for the first few users you plan to add
- ☐ You have personally created a task, attached a file, and moved it on a Kanban board

Getting help

The full installation reference — including operating and backup guidance — is **Installing Resourcecloud** (`docs/install-guide.html` in the repository, also available as a PDF). For anything not covered here, reach out to your Resourcecloud contact.