

InLoox



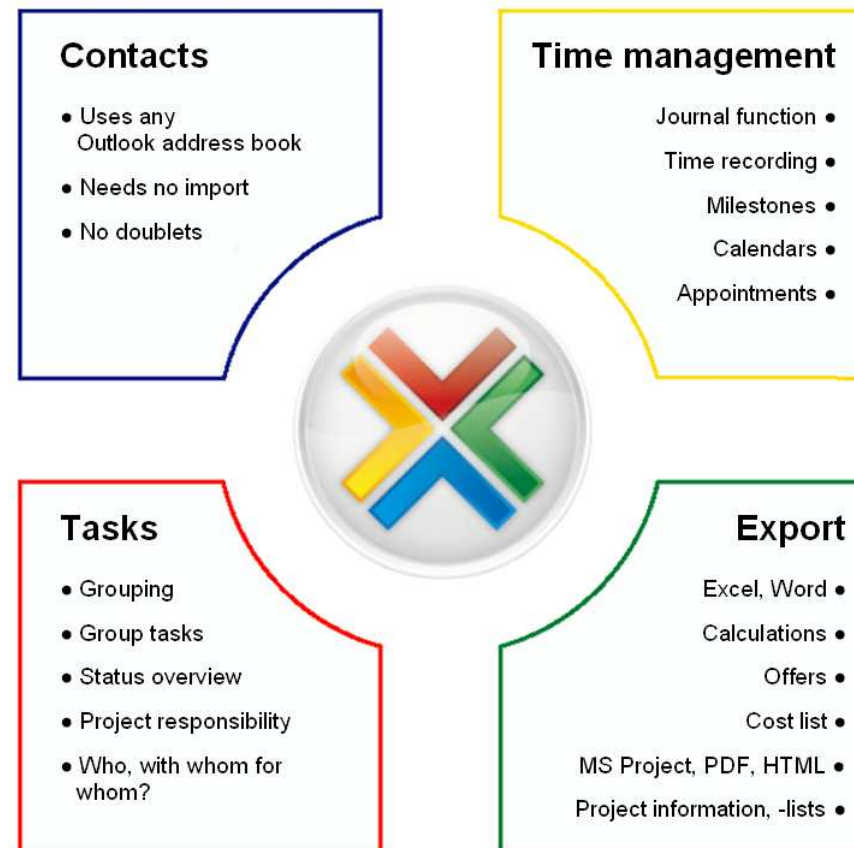
# InLoox product presentation

Project management software,  
integrated into Microsoft Outlook®.

## The project management software InLoox operates within Outlook®.

InLoox simplifies the combined organization of projects, documents, resources and budgets - a highly effective support for everyday standard business processes.

## Central functions:



## The chapters *(Click on button starts chapter)*

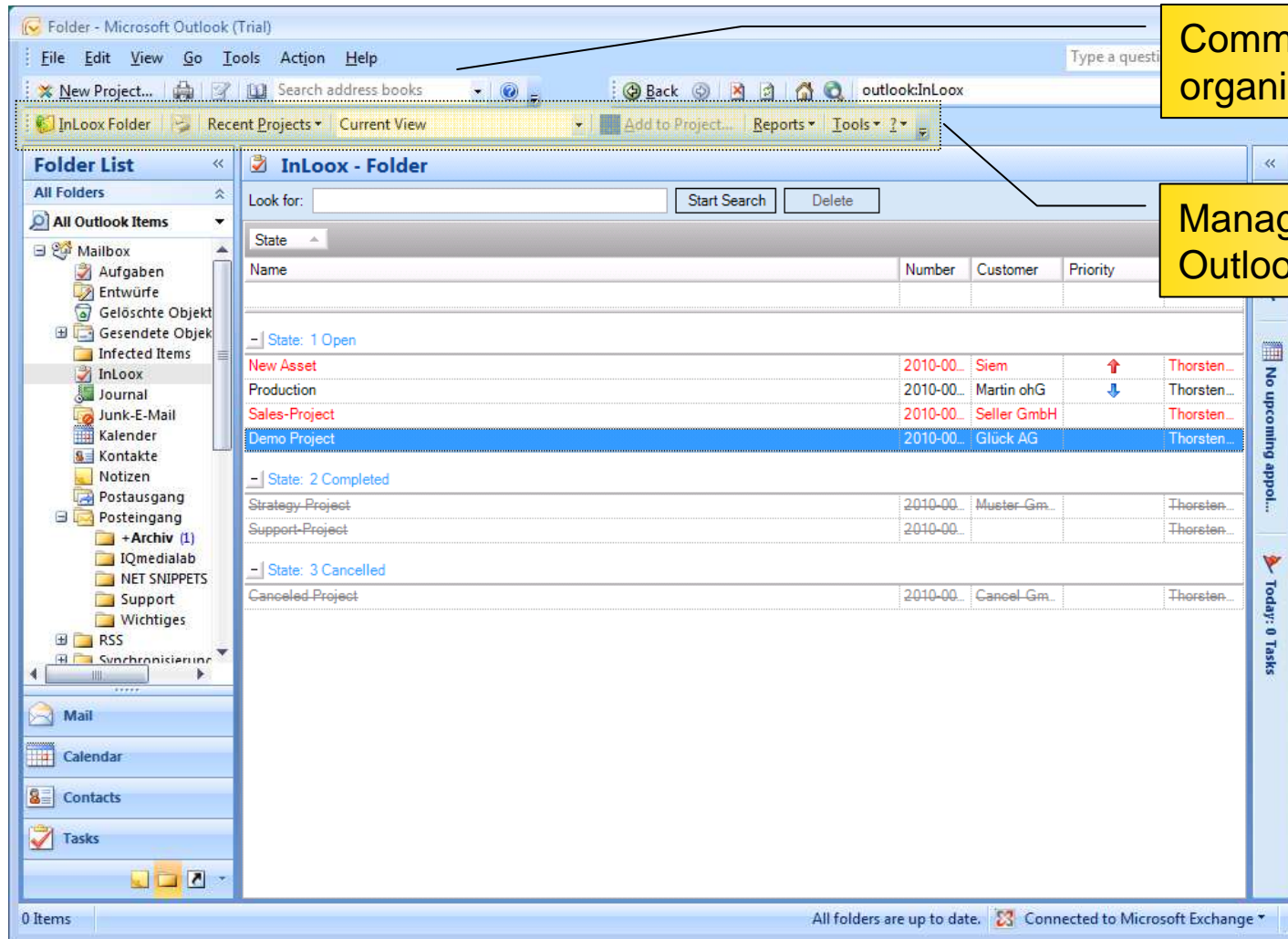
<b>Project Overview</b>	Project lists, integration in Outlook
<b>Manage Page</b>	Base data, contacts, notes
<b>Planning Page</b>	Milestones, phases, resources
<b>Activity Page</b>	Activities, time recording, calendar entries
<b>Document Page</b>	Document management
<b>Budget Page</b>	Project accounting & controlling

Change between chapters with a click on the navigation row (bottom)





# InLoox extends Microsoft Outlook®



Communicate, plan, organize: **Outlook**

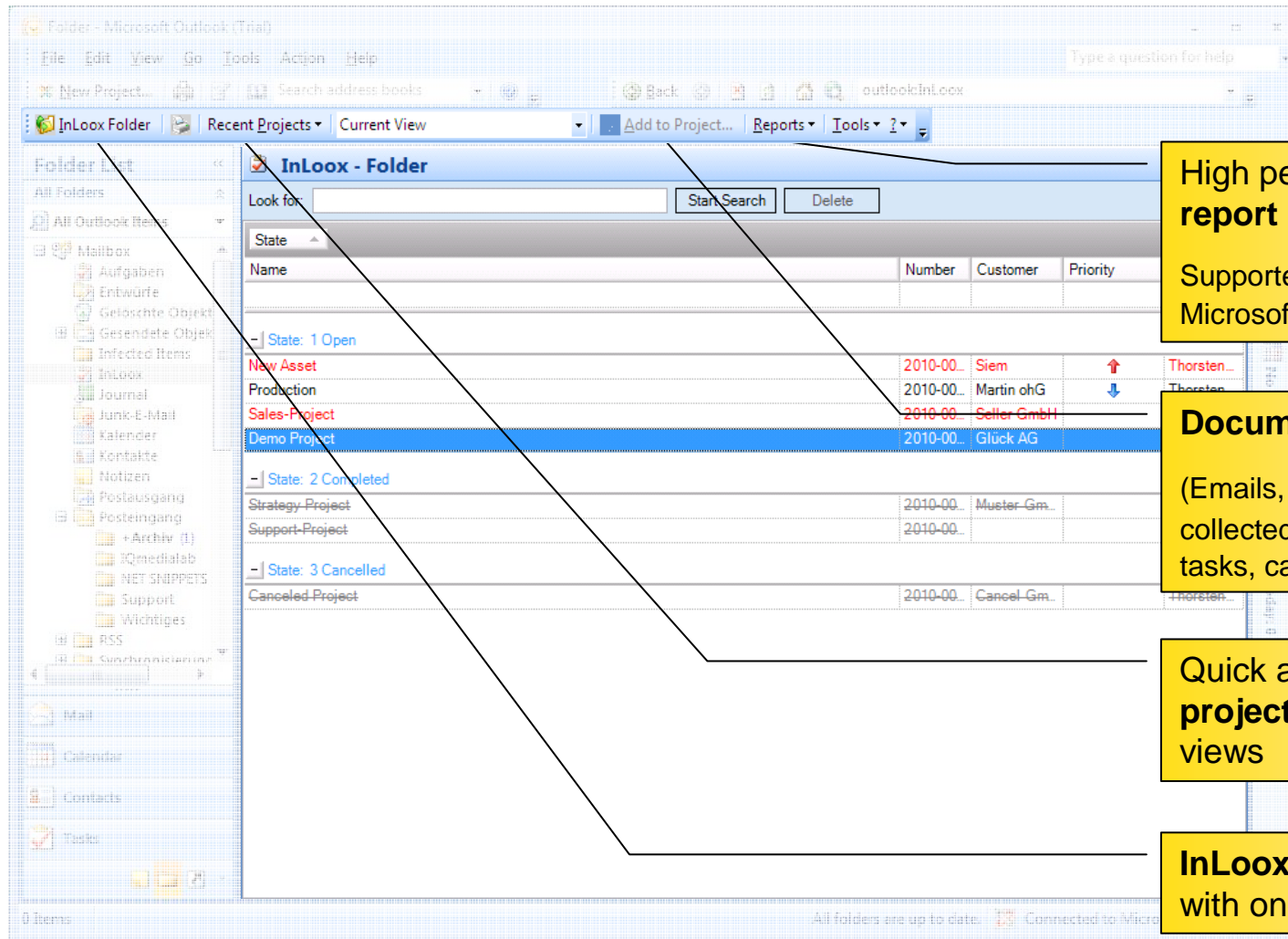
Manage projects in Outlook - with **InLoox**

Overview

<

Slide >

Chapter >>



High performance  
**report generator**

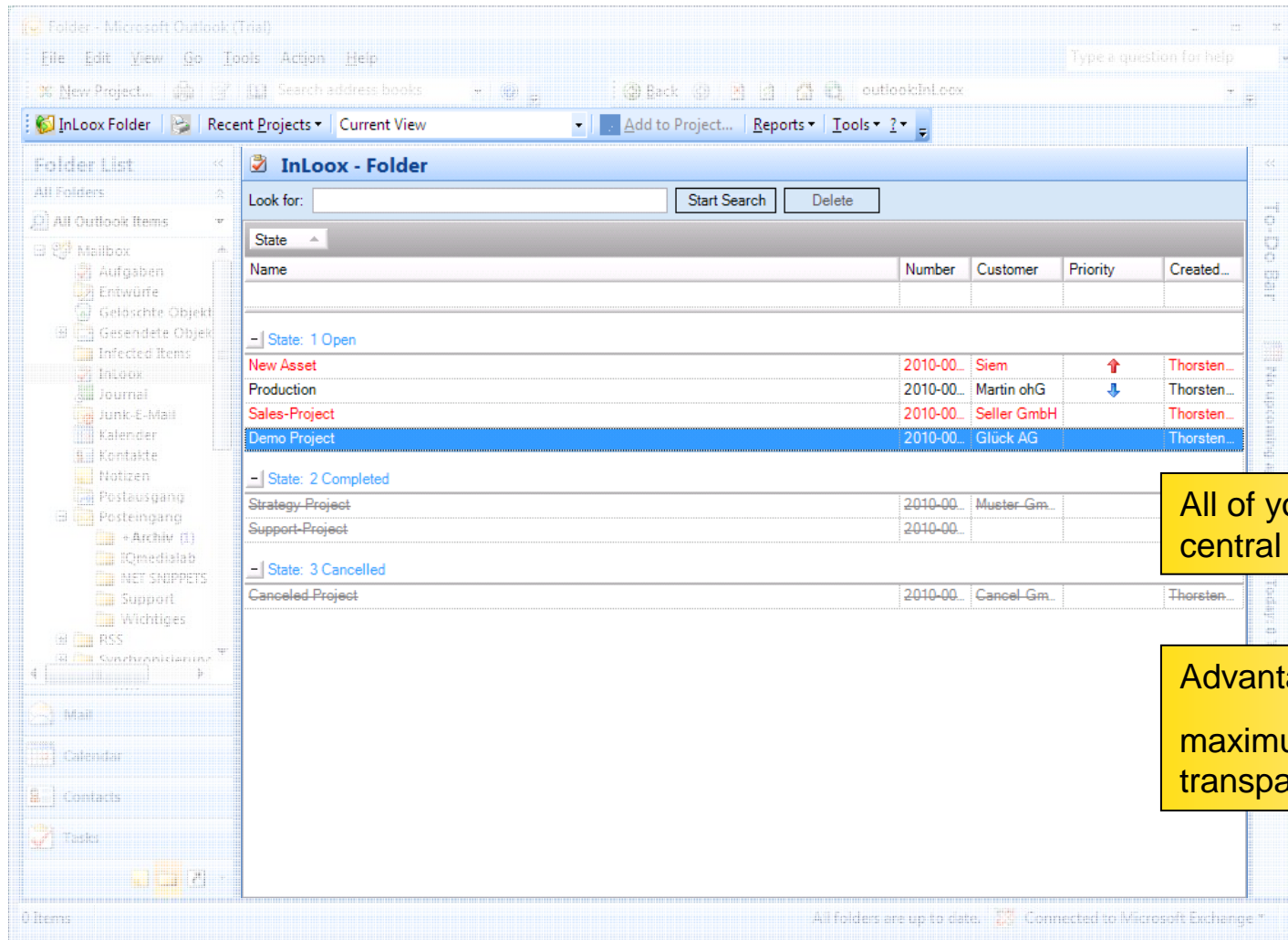
Supported formats:  
Microsoft Excel, RTF, PDF, HTML

**Documents and Activities**

(Emails, attachments, files...)  
collected directly from Outlook  
tasks, calendar and inbox

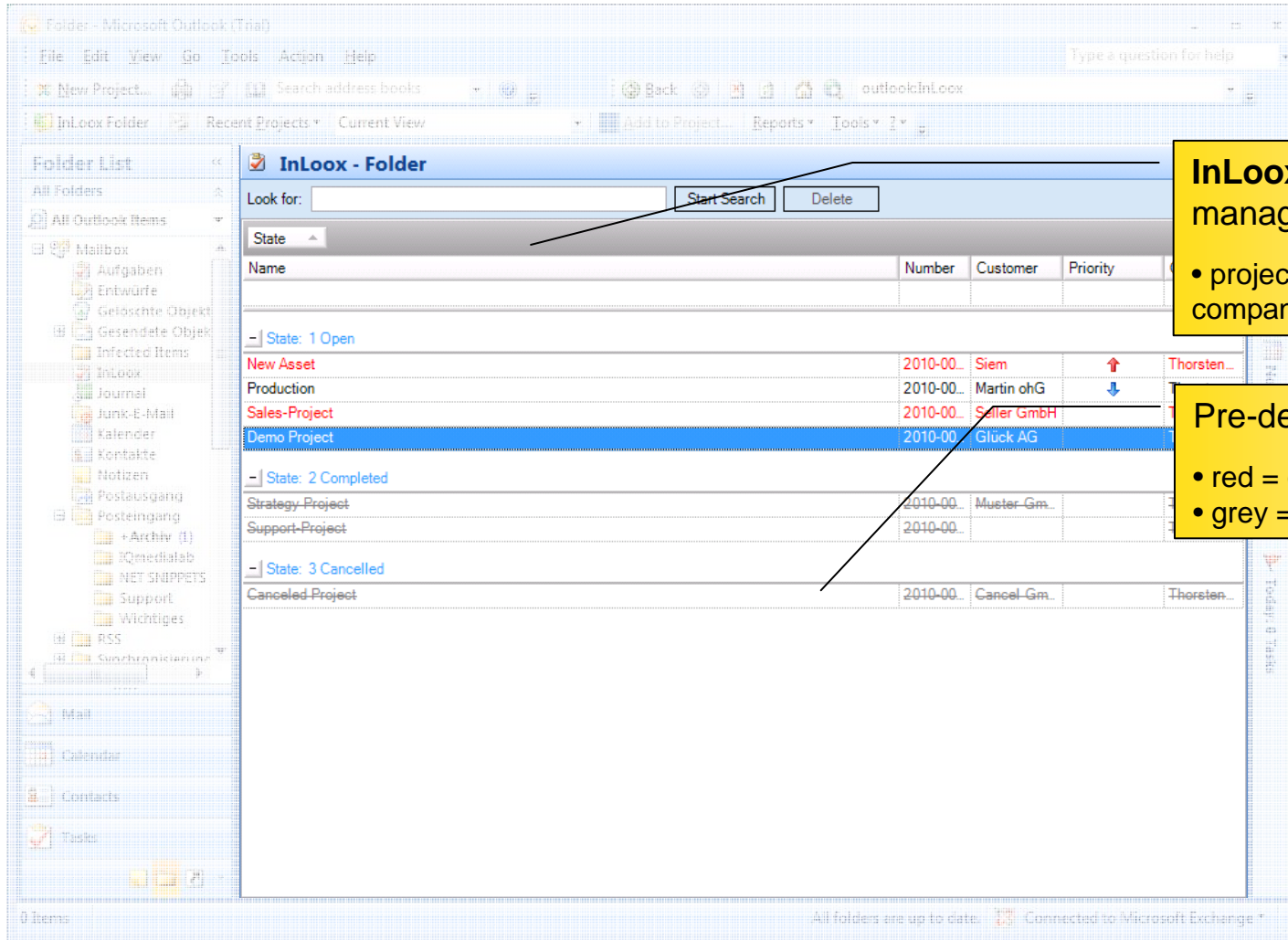
Quick access to **Recent  
projects** from all Outlook  
views

**InLoox** is always available  
with one click



All of your projects in one central overview

Advantages:  
maximum availability and transparency for each user

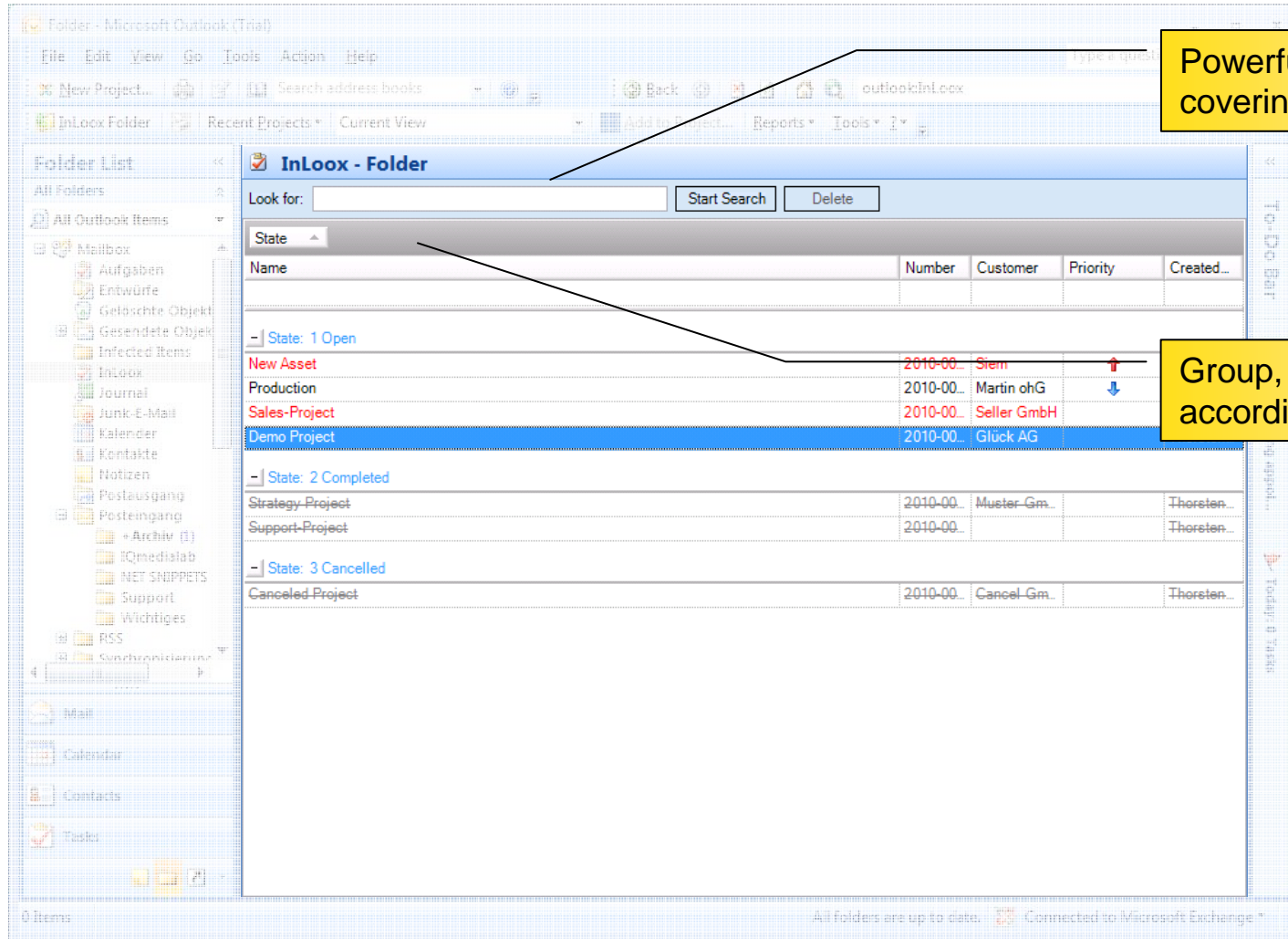


**InLoox fields** for project management

- project status, project priority, company, customer, etc.

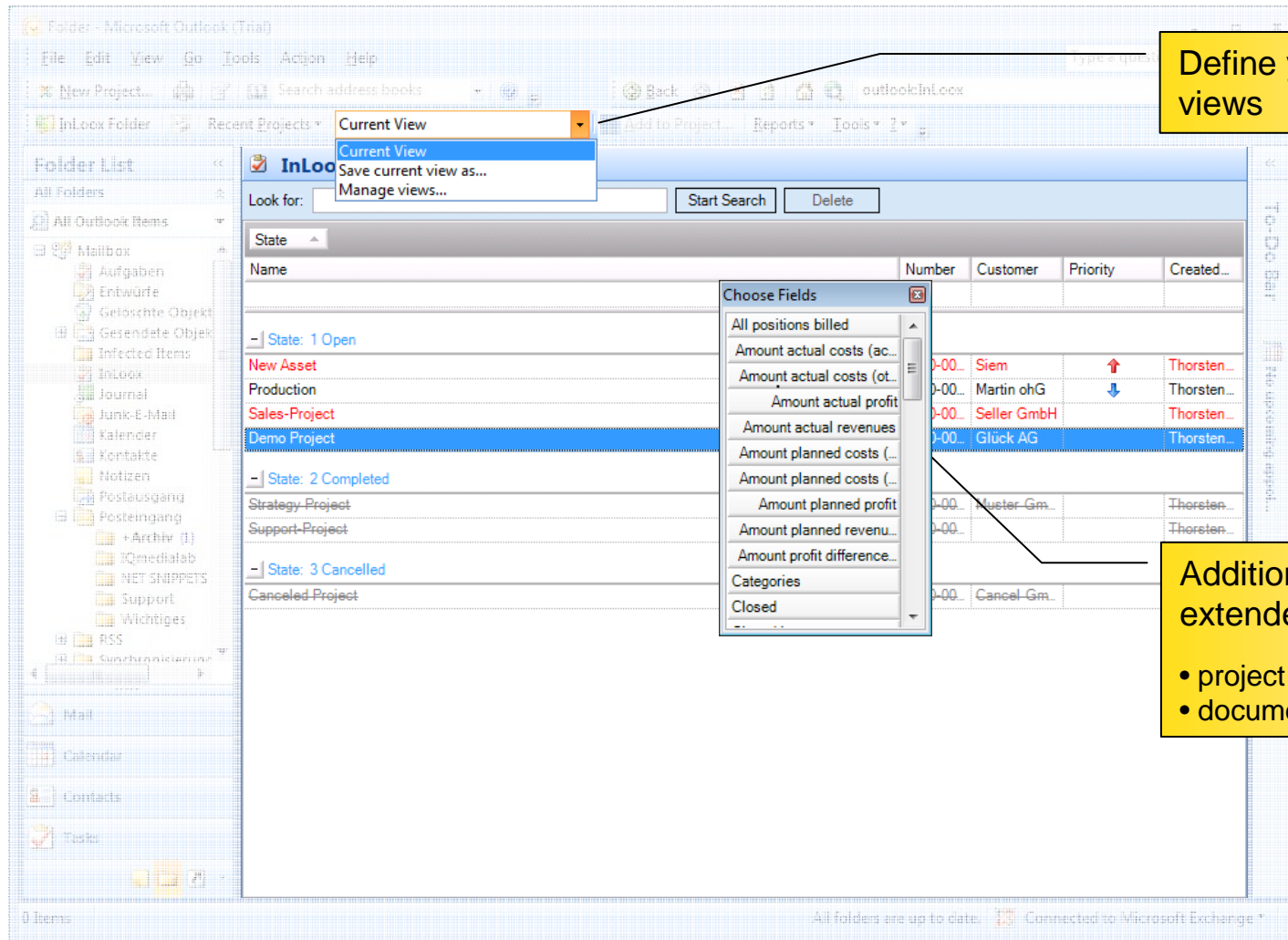
**Pre-defined information rules**

- red = overdue project
- grey = closed project



Powerful full text search covering all projects

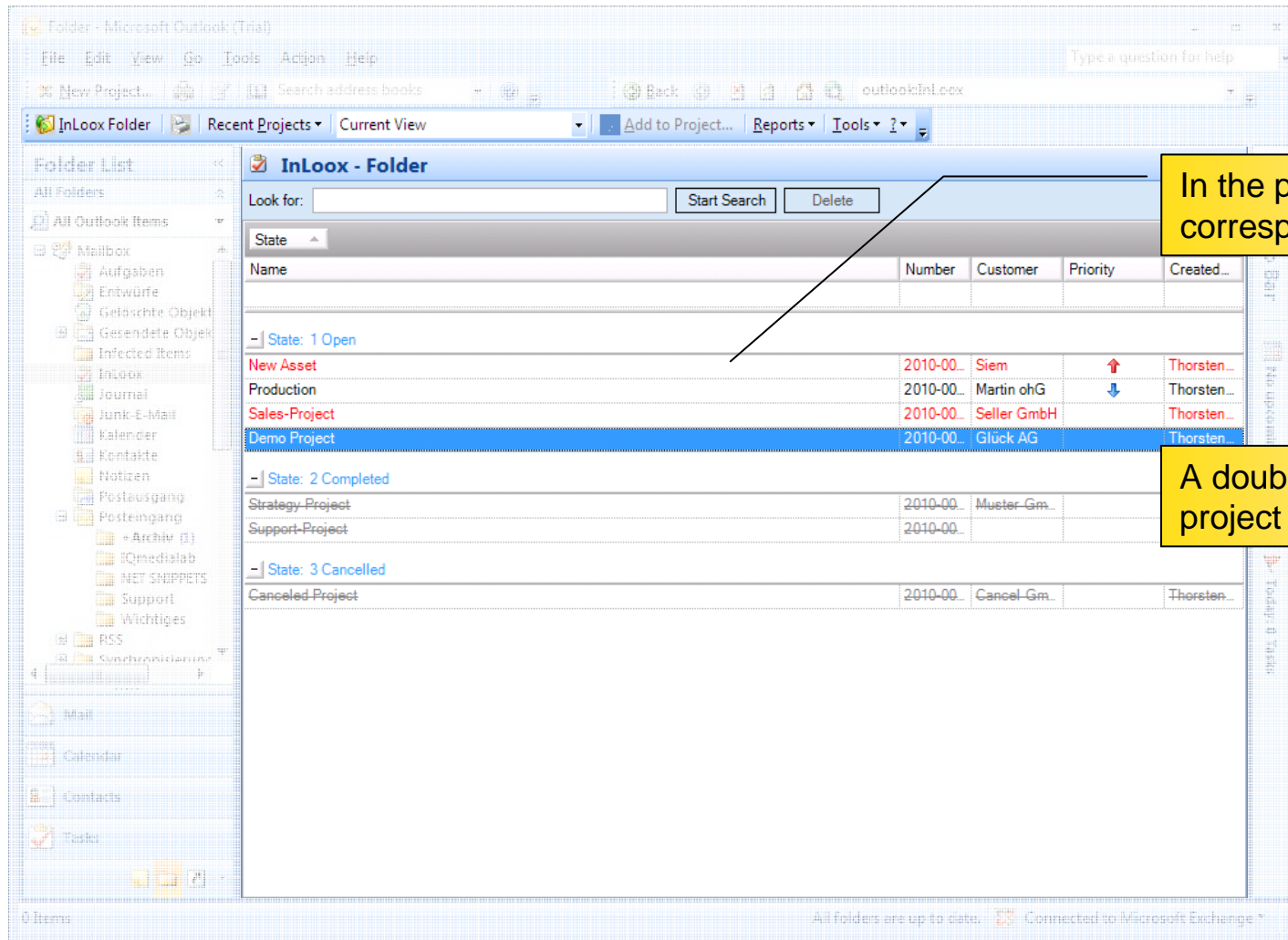
Group, filter and flag according to many criteria

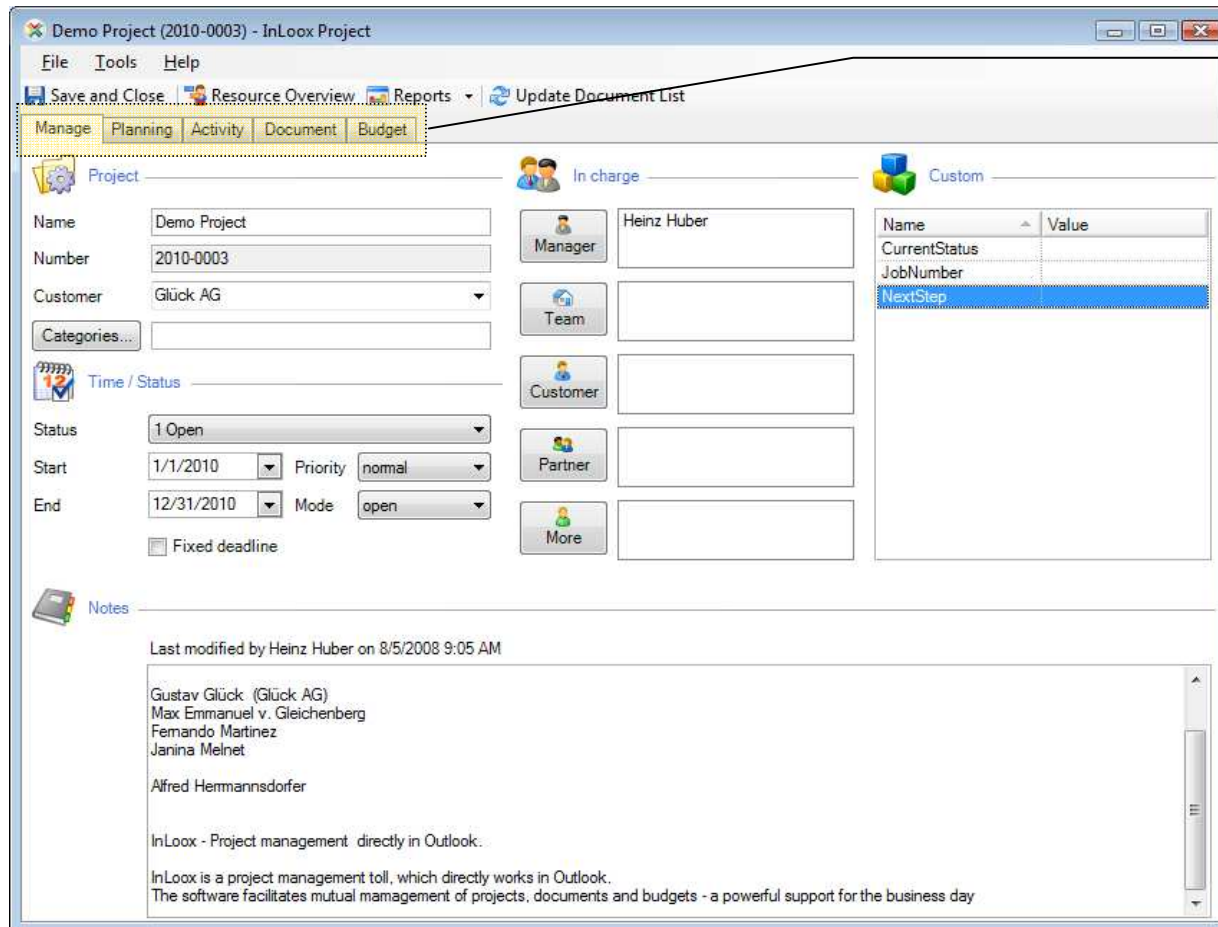


Define your own personal views

Additional InLoox fields for extended project information

- project managers, start, end
- document folder, customer, etc.



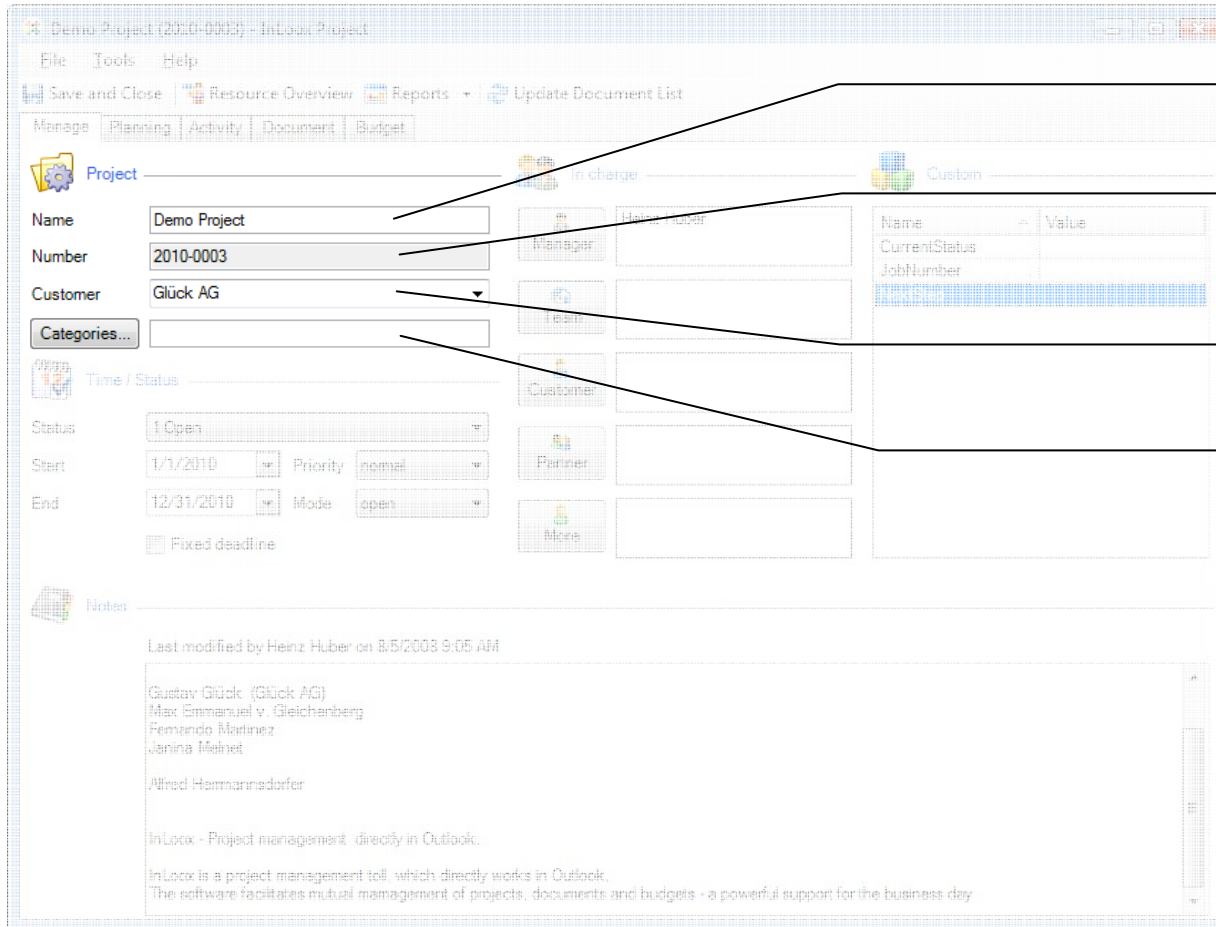


A tab for each **project module**:

- Manage
- Planning
- Activities
- Documents
- Budget

## „The Philosophy“

InLoox displays each project in one consistent structure. Projects are in the focus instead of handling of a complicated application



Project Name: Demo Project

Project Number: 2010-0003

Customer: Glück AG

Categories: [Empty]

Status: 1 Open

Start: 1/1/2010 Priority: normal

End: 12/31/2010 Mode: open

Notes:

Last modified by Heinz Huber on 8/5/2008 9:05 AM

Gustav Glück (Glück AG)  
 Max Emmanuel v. Gleichenberg  
 Fernando Martinez  
 Janina Meinet  
 Alfred Hamannsdorfer

InLoox - Project management directly in Outlook.  
 InLoox is a project management tool, which directly works in Outlook.  
 The software facilitates mutual management of projects, documents and budgets - a powerful support for the business day

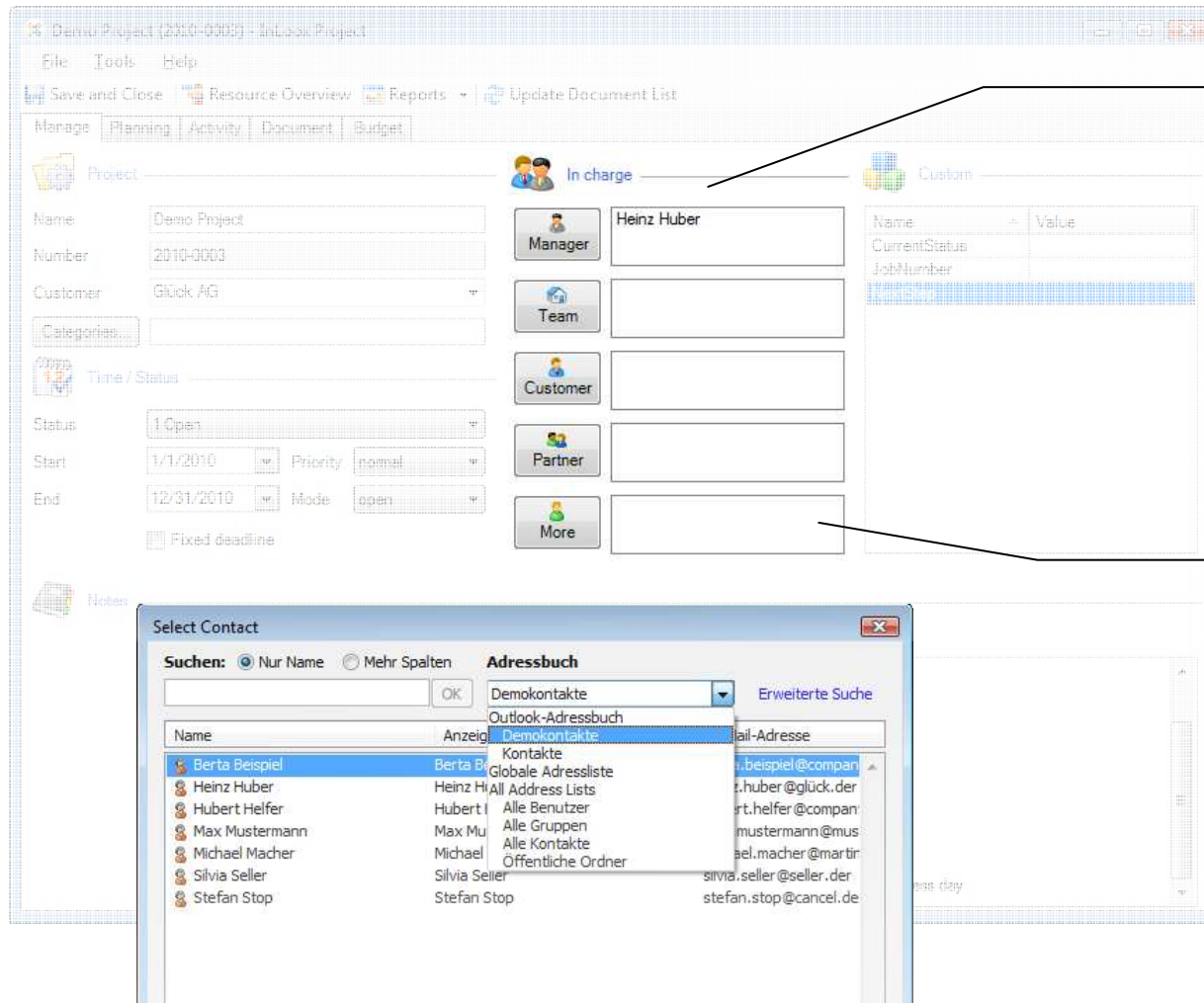
Project name

Explicit project number in a freely definable format

Customer

Freely definable server-based category, e.g.:

- Trading area
- Customer group
- Department

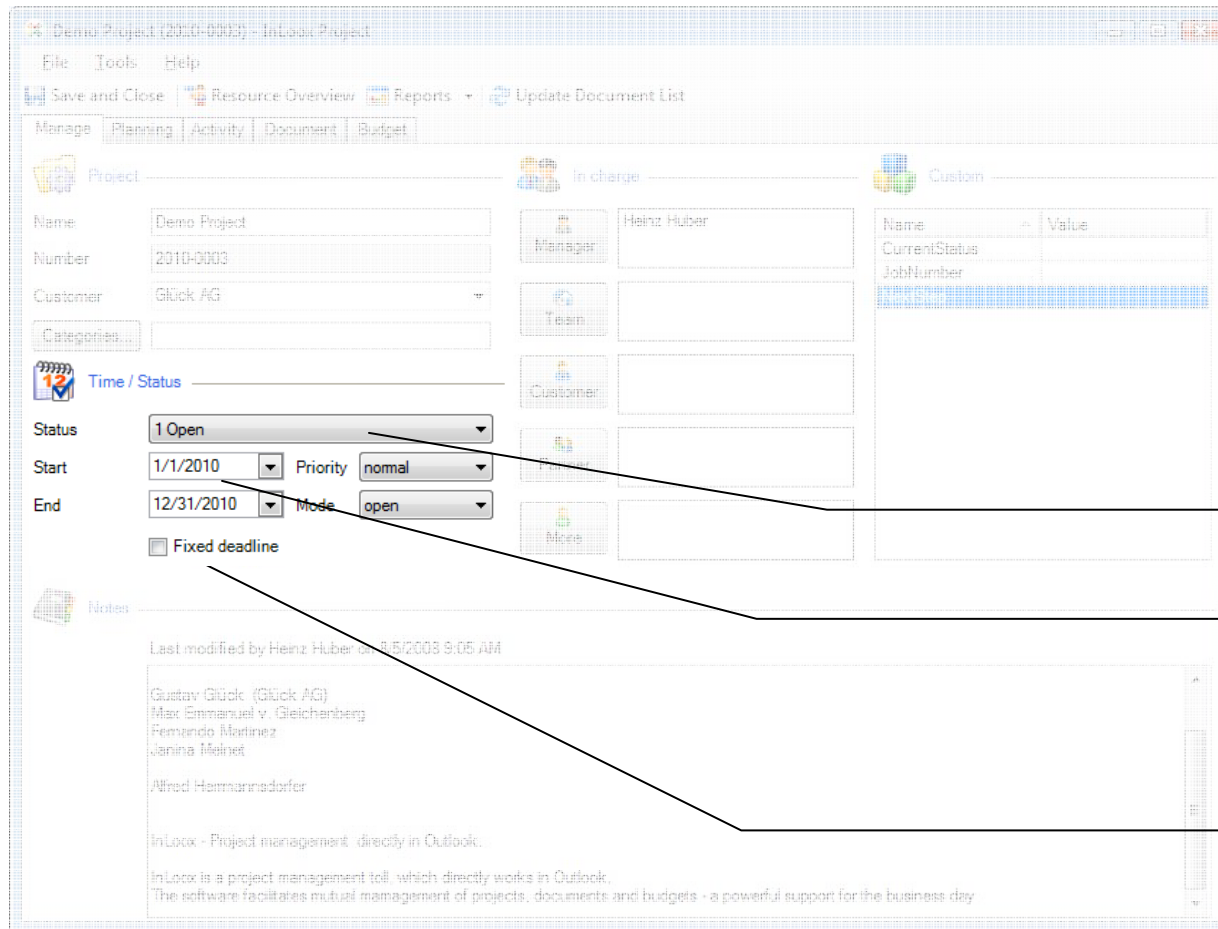


## Project contacts:

- Project manager
- Team members
- Customer
- Partner

Outlook address books and Exchange address lists (GAL) are used without doublets or synchronization

More contacts, e.g. project-distributor or mailing lists

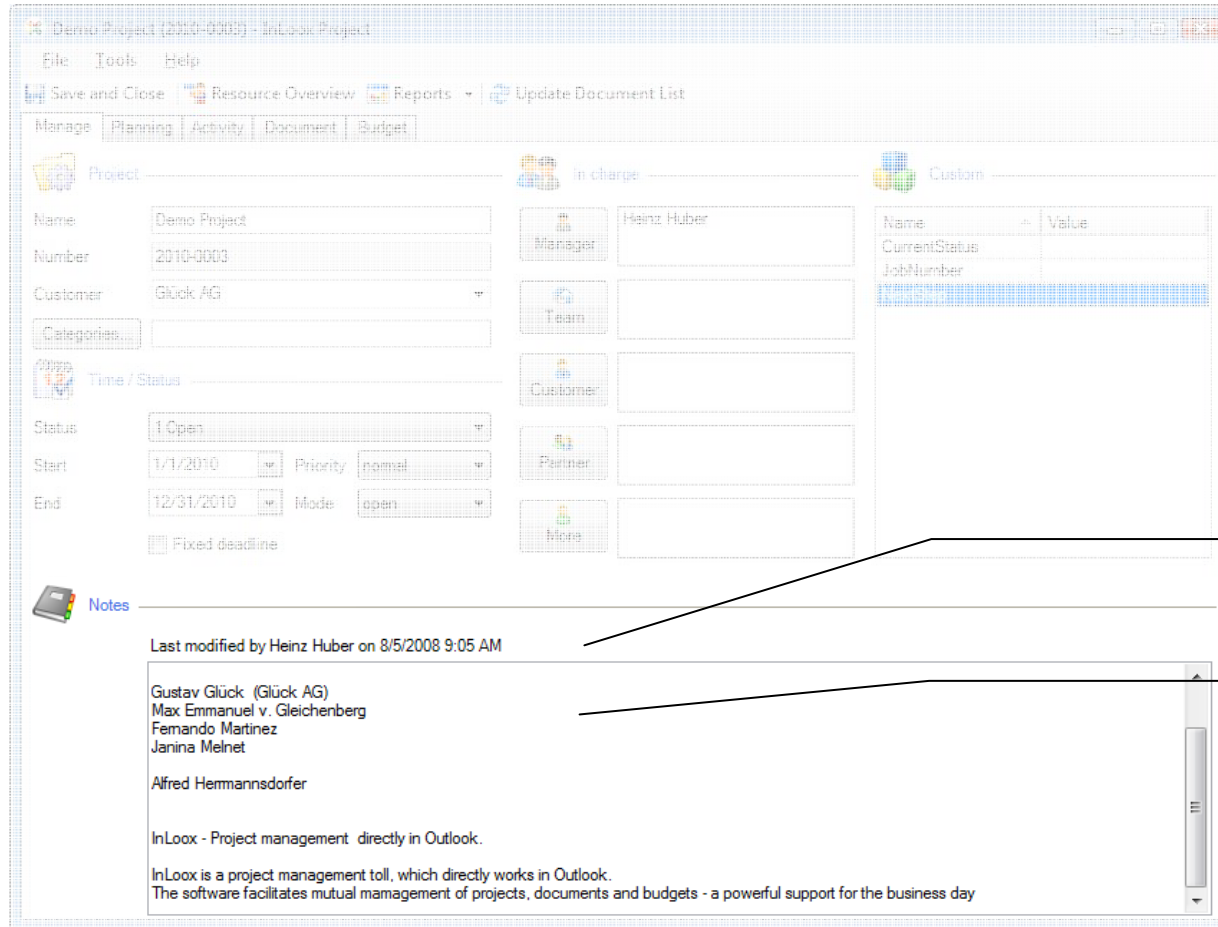


Status: freely-definable

Schedule

- Start/end
- Priority

„soft“ or „hard“ deadline

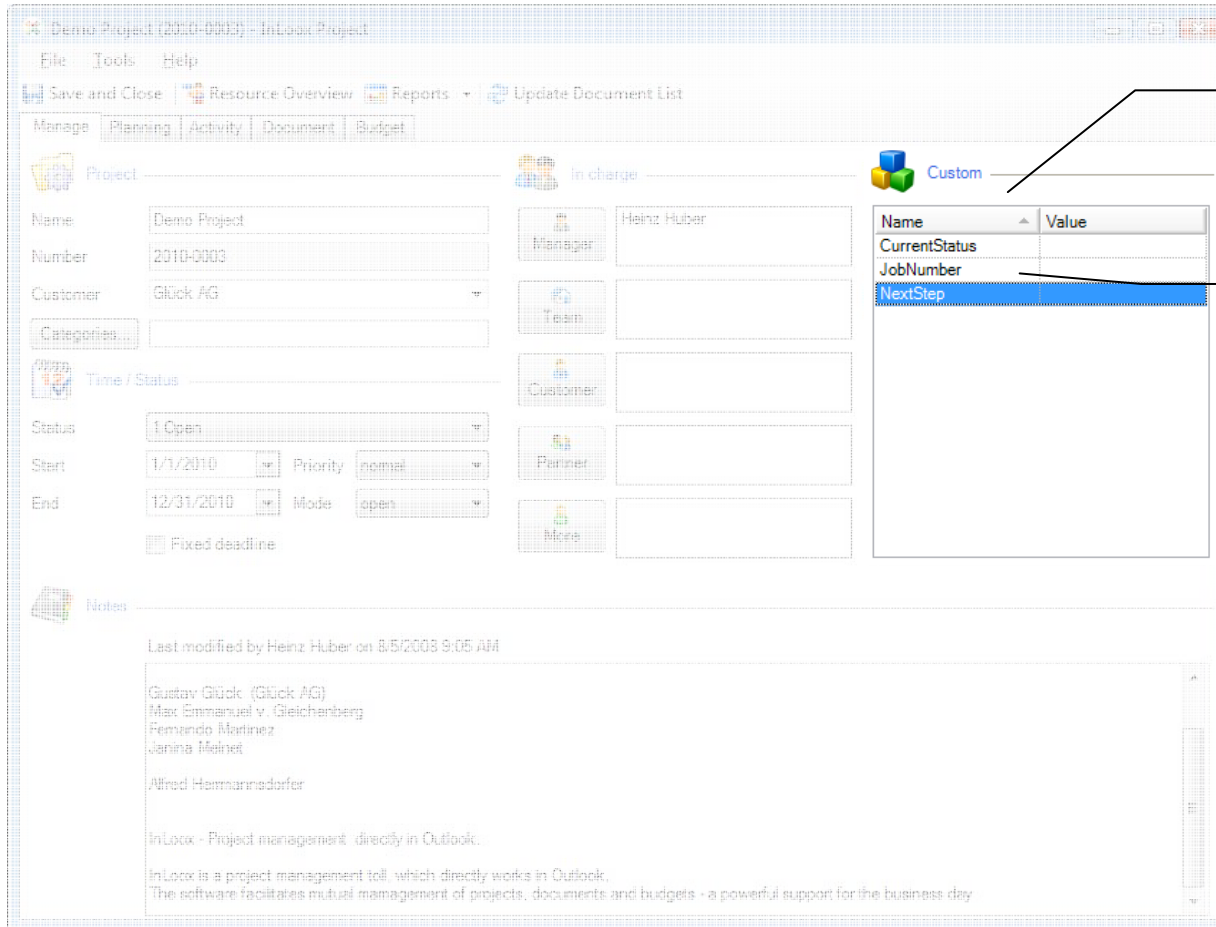


The screenshot shows the InLoox interface with the following details:

- Project Information:** Name: Demo Project, Number: 2010-0000, Customer: Glück AG.
- In charge:** Heinz Huber (Manager).
- Time / Status:** Status: 1 Open, Start: 1/1/2010, End: 12/31/2010, Priority: normal, Mode: open.
- Notes:**
  - Last modified by Heinz Huber on 8/5/2008 9:05 AM
  - Gustav Glück (Glück AG)
  - Max Emmanuel v. Gleichenberg
  - Fernando Martinez
  - Janina Melnet
  - Alfred Hermannsdorfer
  - InLoox - Project management directly in Outlook.
  - InLoox is a project management tool, which directly works in Outlook.
  - The software facilitates mutual management of projects, documents and budgets - a powerful support for the business day

Automatic author and date documentation

Settles project goals and mission statements



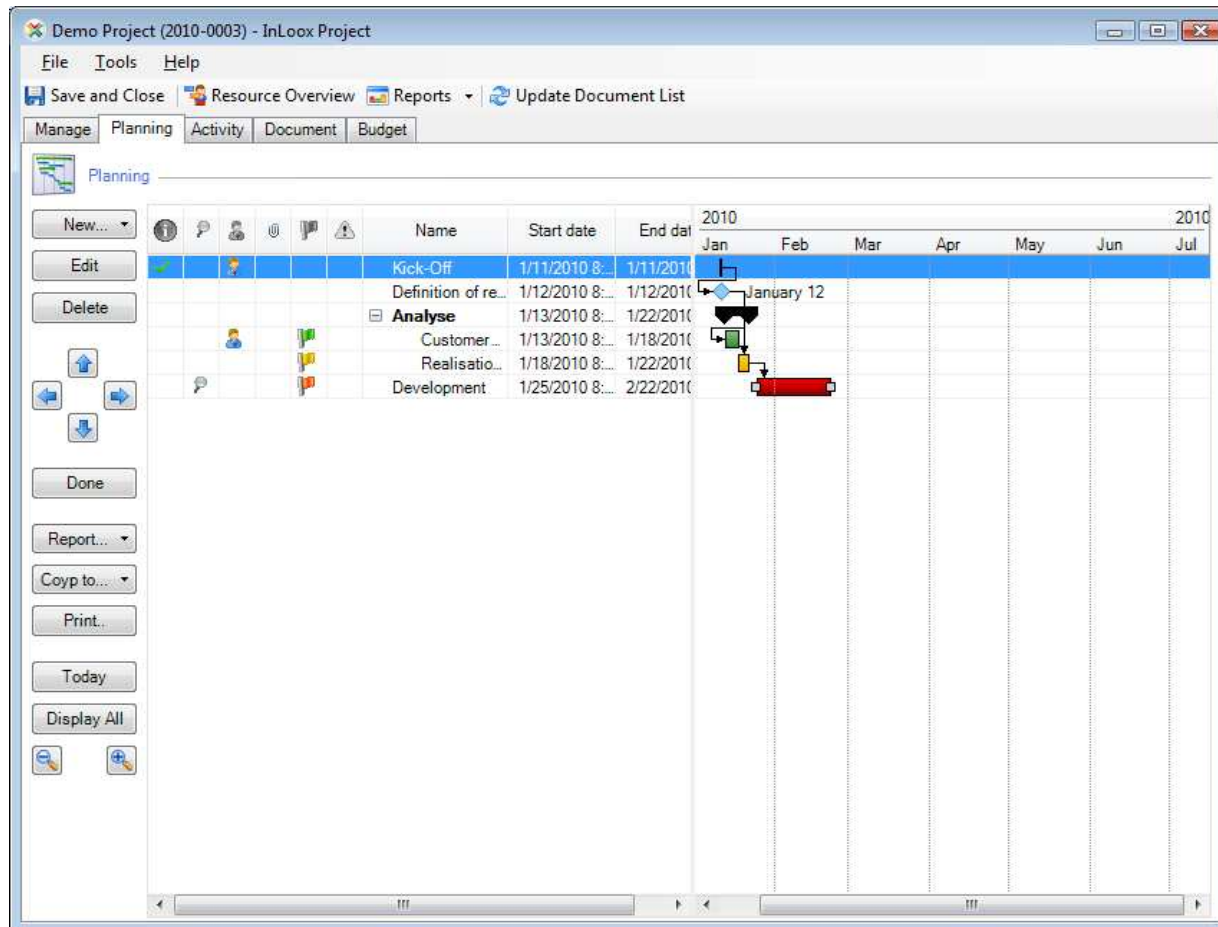
The screenshot shows the InLoox software interface for a project named 'Demo Project'. The form includes fields for Name, Number, Customer, Status, Start, End, Priority, and Mode. A 'Custom' data field table is visible on the right side of the form, with the following structure:

Name	Value
CurrentStatus	
JobNumber	
NextStep	

The 'NextStep' field is highlighted in blue. The interface also shows a 'Notes' section at the bottom with text about the software's capabilities.

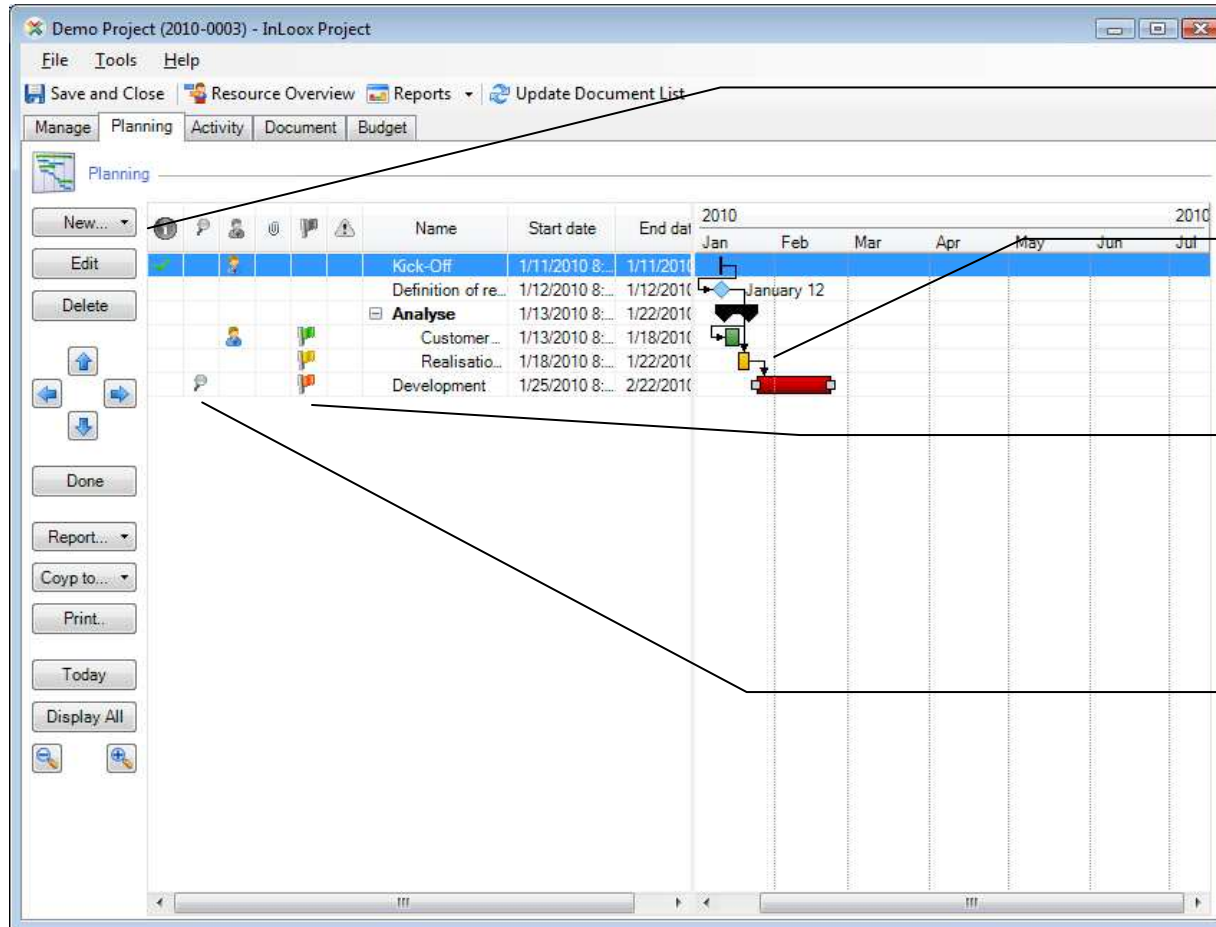
Possibility for adding **custom data fields**, without programming knowledge

Extend the data model, e.g. by the **Next step** or **Job number** fields



## Project scheduling

Define Milestones, phases and resources for a project



Create new phases, work packages and milestones

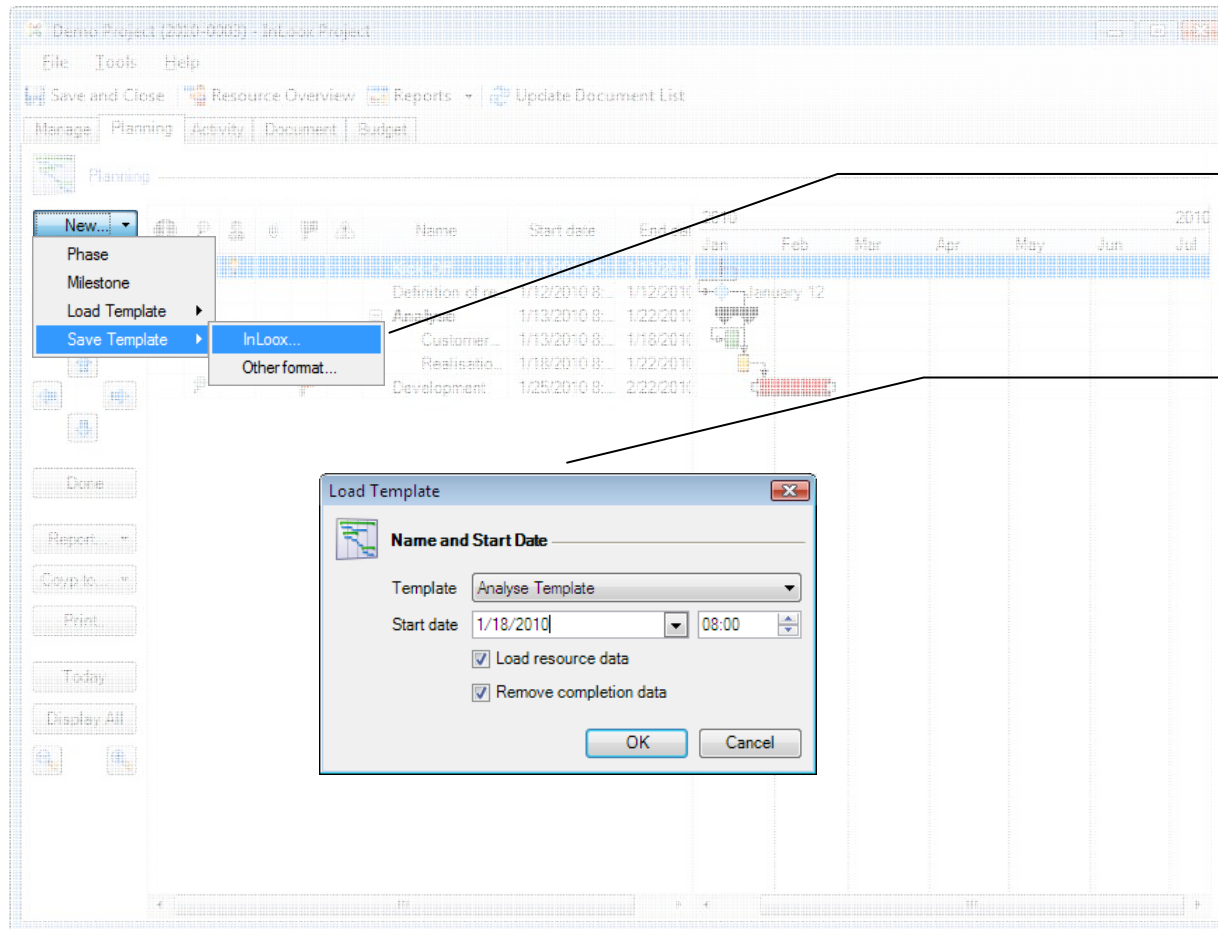
Dependencies between planning elements (successors)

### Reminder and status

A reminder function permits automatic follow-ups. A status trace is also possible.

### Additional information:

- Allocated resources
- Linked documents
- Phase overdue

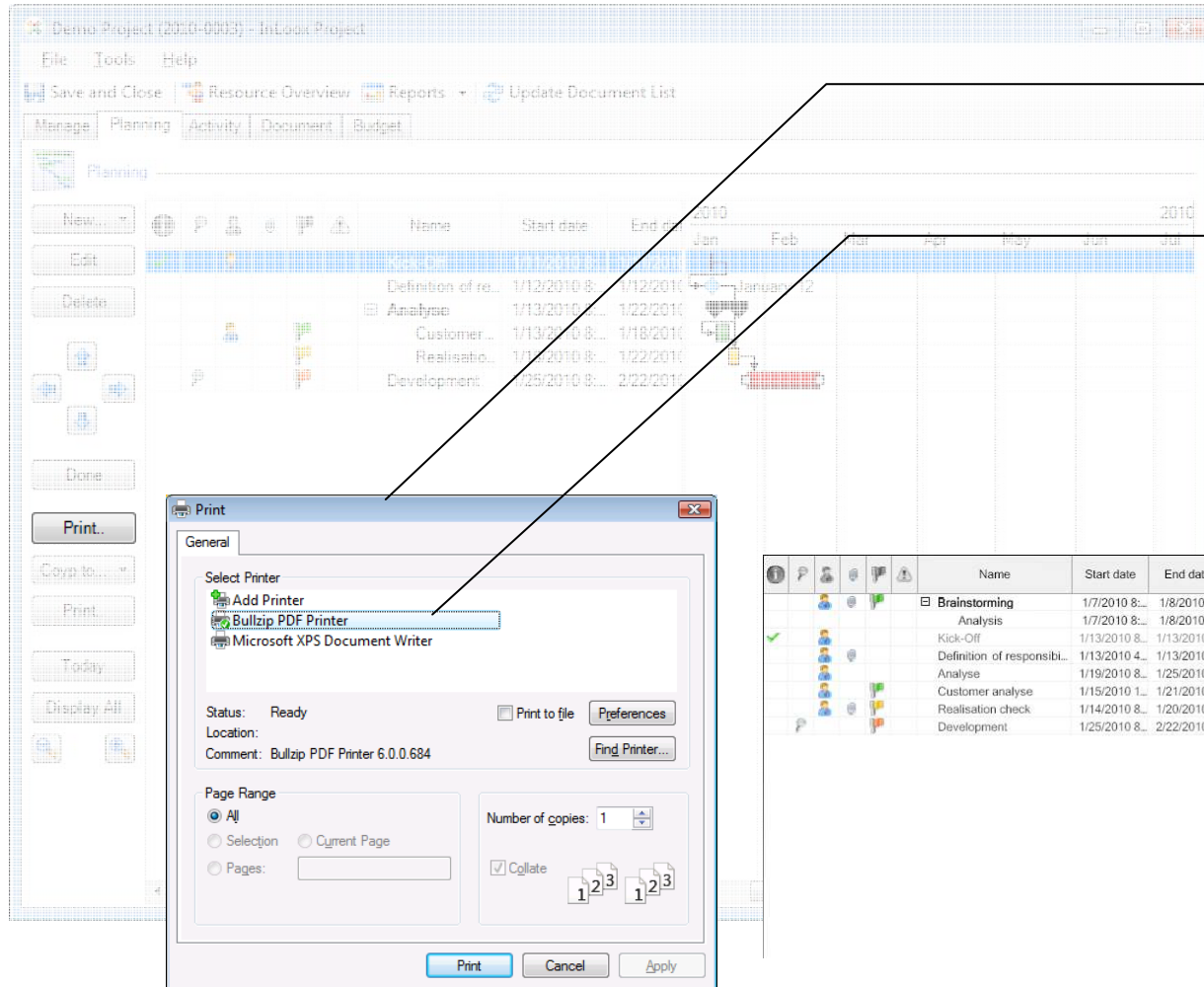


**Load Microsoft Project or InLoox templates into the planning diagram**

### Select a template

Templates are free definable, e.g.:

- Employee introduction
- QA project
- Strategy project
- IT-planning

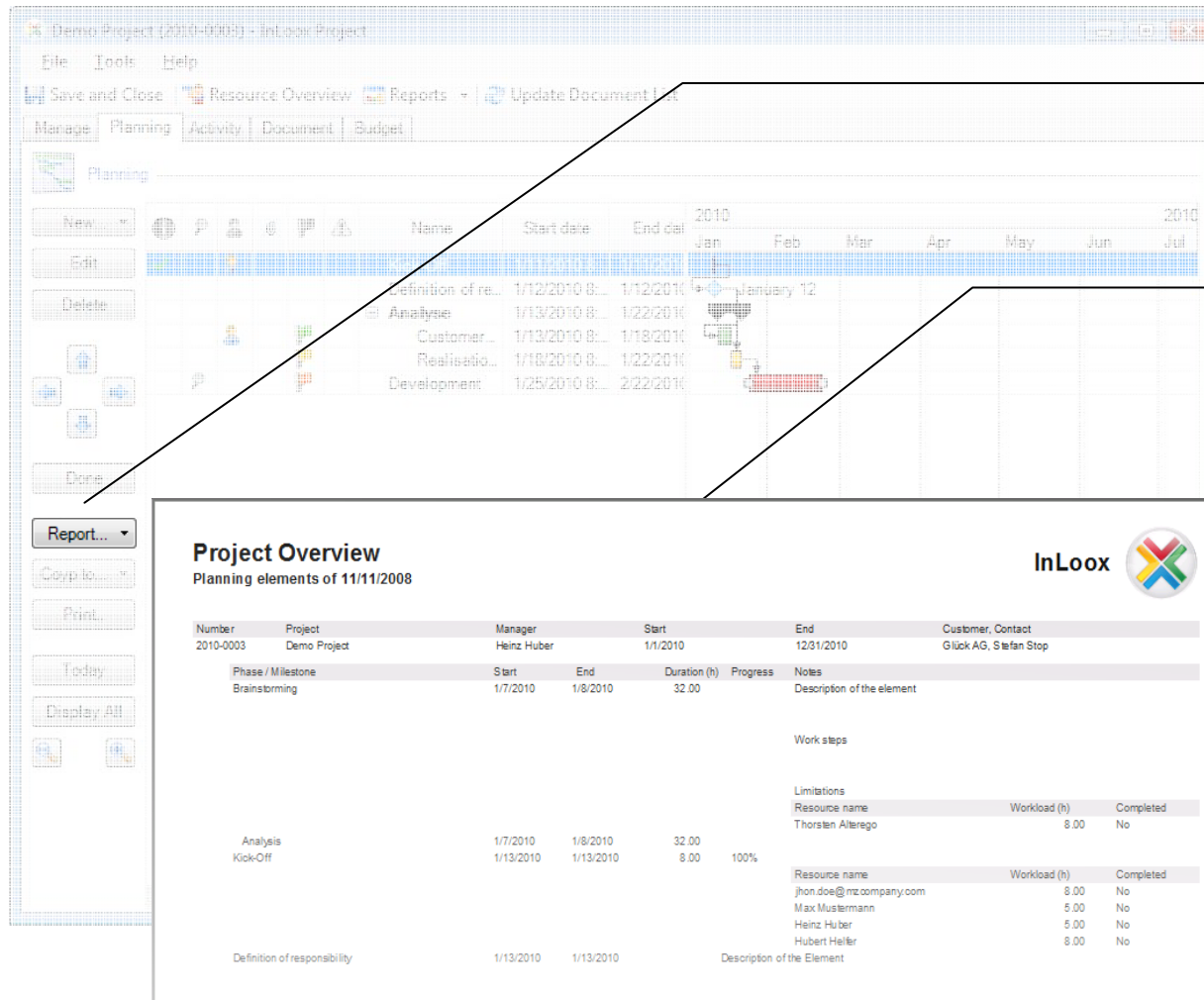


The screenshot shows the InLoox software interface with a project planning Gantt chart. A 'Print' dialog box is open, displaying the following details:

- General Tab:**
  - Select Printer:** Add Printer, Bullzip PDF Printer (selected), Microsoft XPS Document Writer.
  - Status:** Ready
  - Location:** Bullzip PDF Printer 6.0.0.684
  - Page Range:** All (selected), Selection, Current Page, Pages: [ ]
  - Number of copies:** 1
  - Collate:** [x] Collate

Print, e.g. in Letter (8,5" x 11) format available

Any printers, e.g. Adobe PDF Writer®



**Project Overview**  
Planning elements of 11/11/2008

Number	Project	Manager	Start	End	Customer, Contact
2010-0003	Demo Project	Heinz Huber	1/1/2010	12/31/2010	Glück AG, Stefan Stop

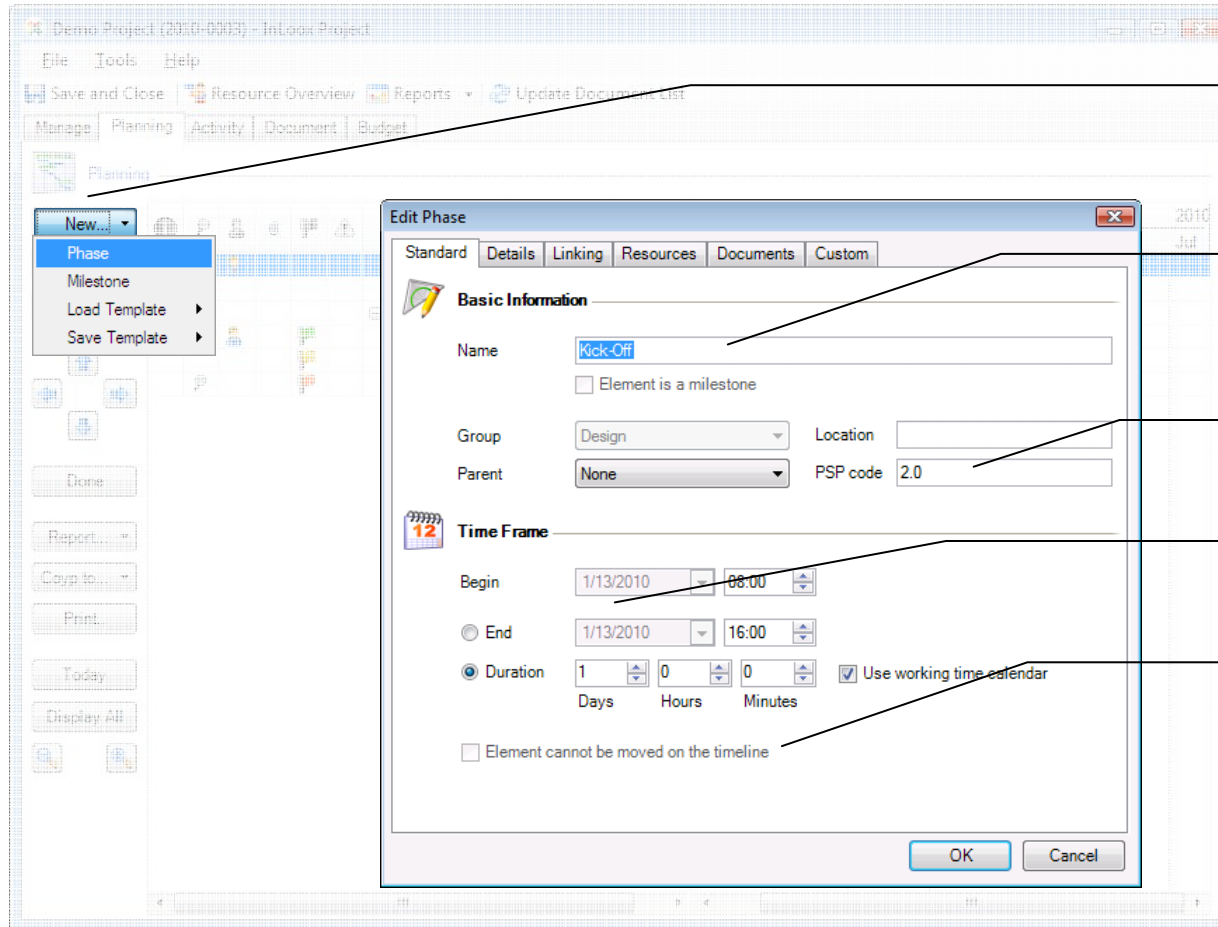
Phase / Milestone	Start	End	Duration (h)	Progress	Notes
Brainstorming	1/7/2010	1/8/2010	32.00		Description of the element
Analysis	1/7/2010	1/8/2010	32.00		
Kick-Off	1/13/2010	1/13/2010	8.00	100%	
Definition of responsibility	1/13/2010	1/13/2010			Description of the Element

Resource name	Workload (h)	Completed
Thorsten Alterego	8.00	No
jhon.doe@mz.company.com	8.00	No
Max Mustermann	5.00	No
Heinz Huber	5.00	No
Hubert Helfer	8.00	No

Data transfer and evaluation into different formats are possible with one click

An entire project plan in the report generator  
Support formats are Microsoft Excel, RTF, PDF, HTML, ...



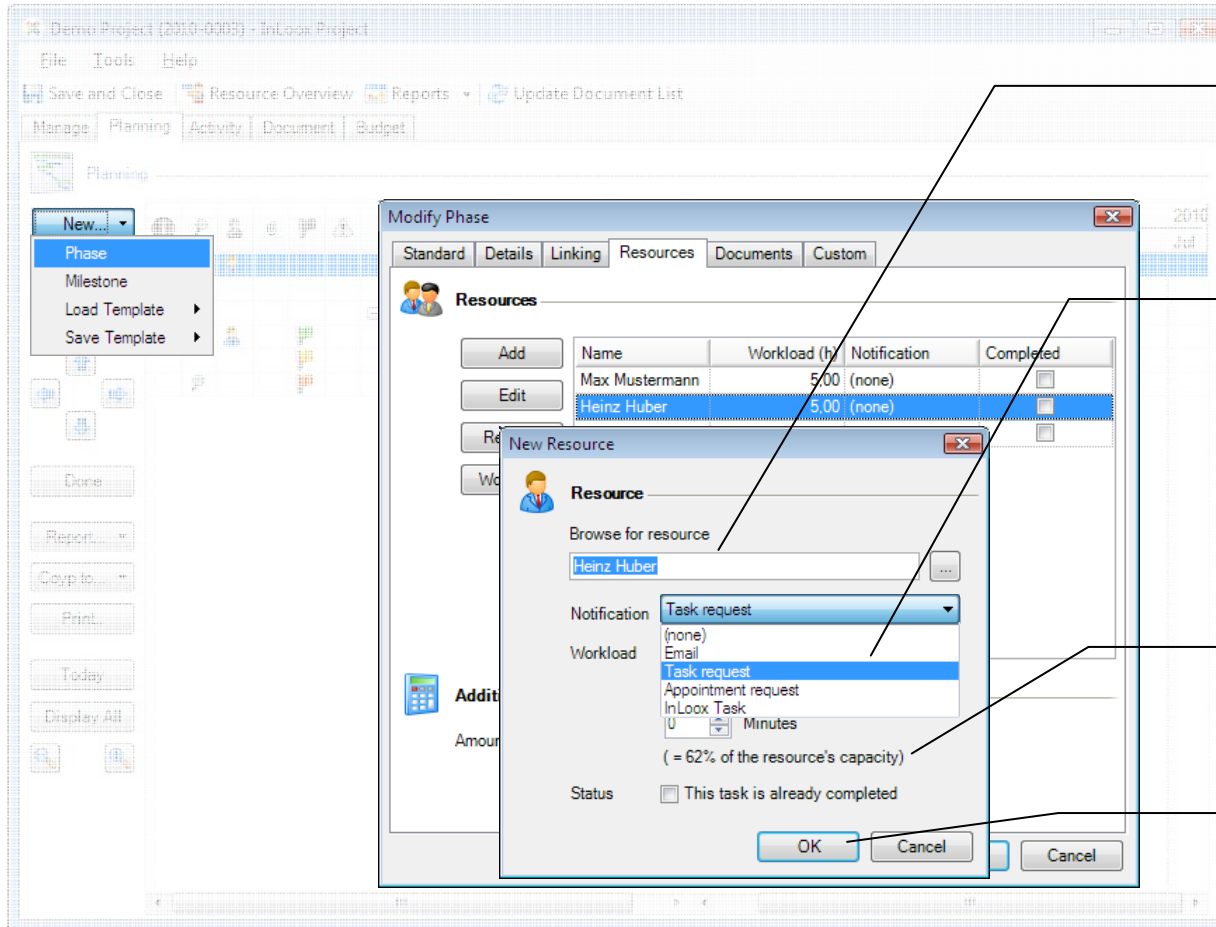
Create new phases and milestones

Phase name, assigned group

Project structure plan code

Beginning, duration or end

Fix element



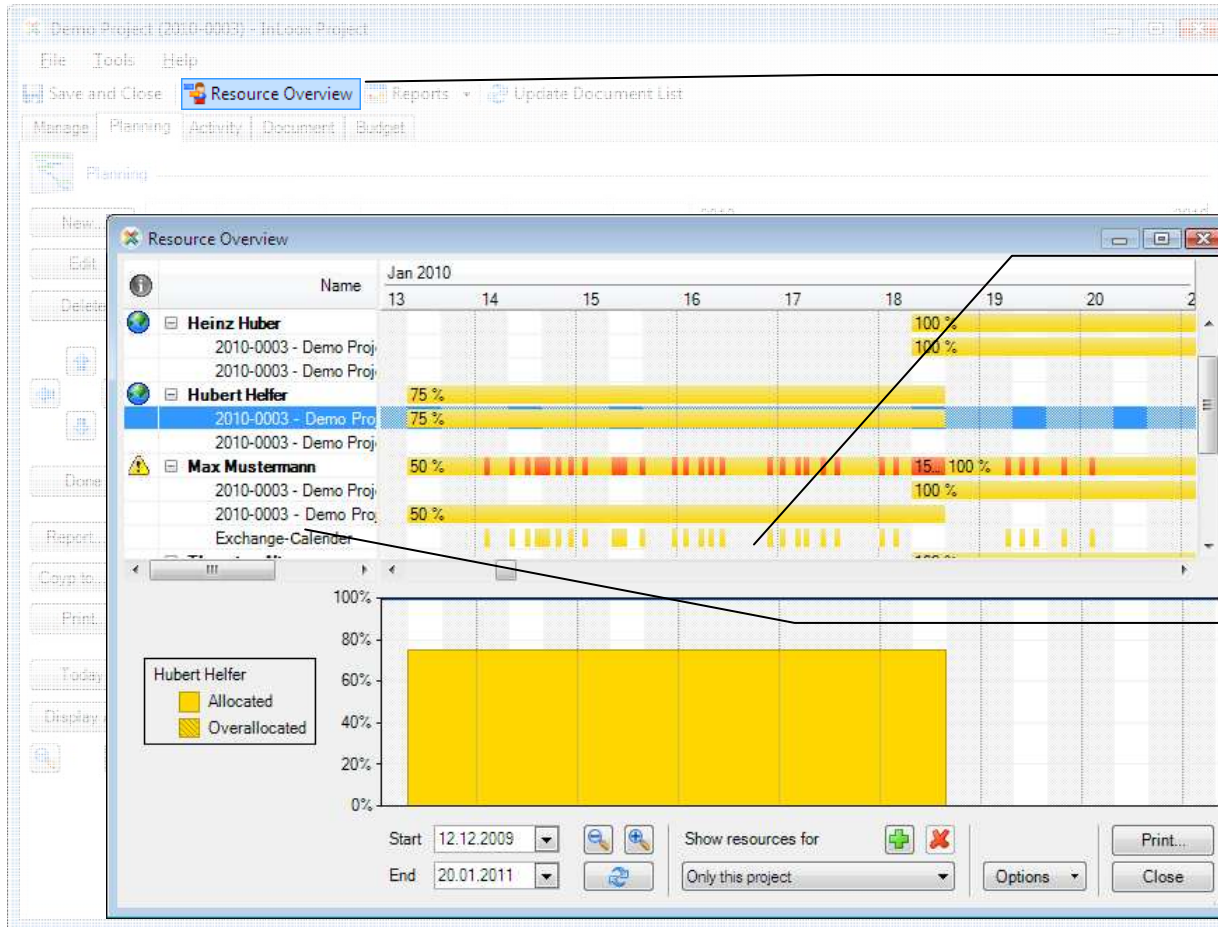
Outlook contacts and Exchange directories are supported

Automatic resources notification

- via email
- with InLoox Task
- Appointment request
- Task request

Automatic capacity calculation

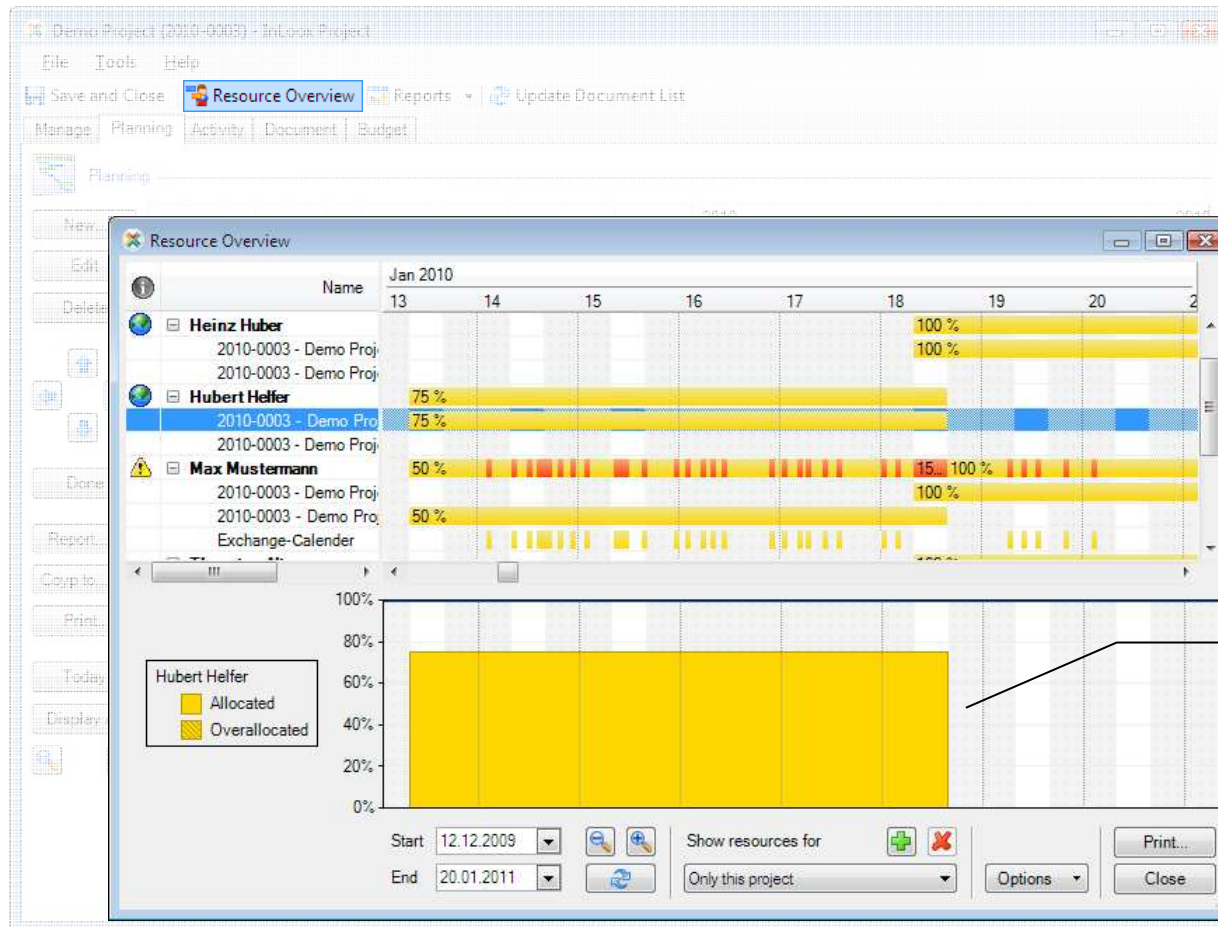
Data and instructions are communicated to resources automatically



View resource capacities with one click

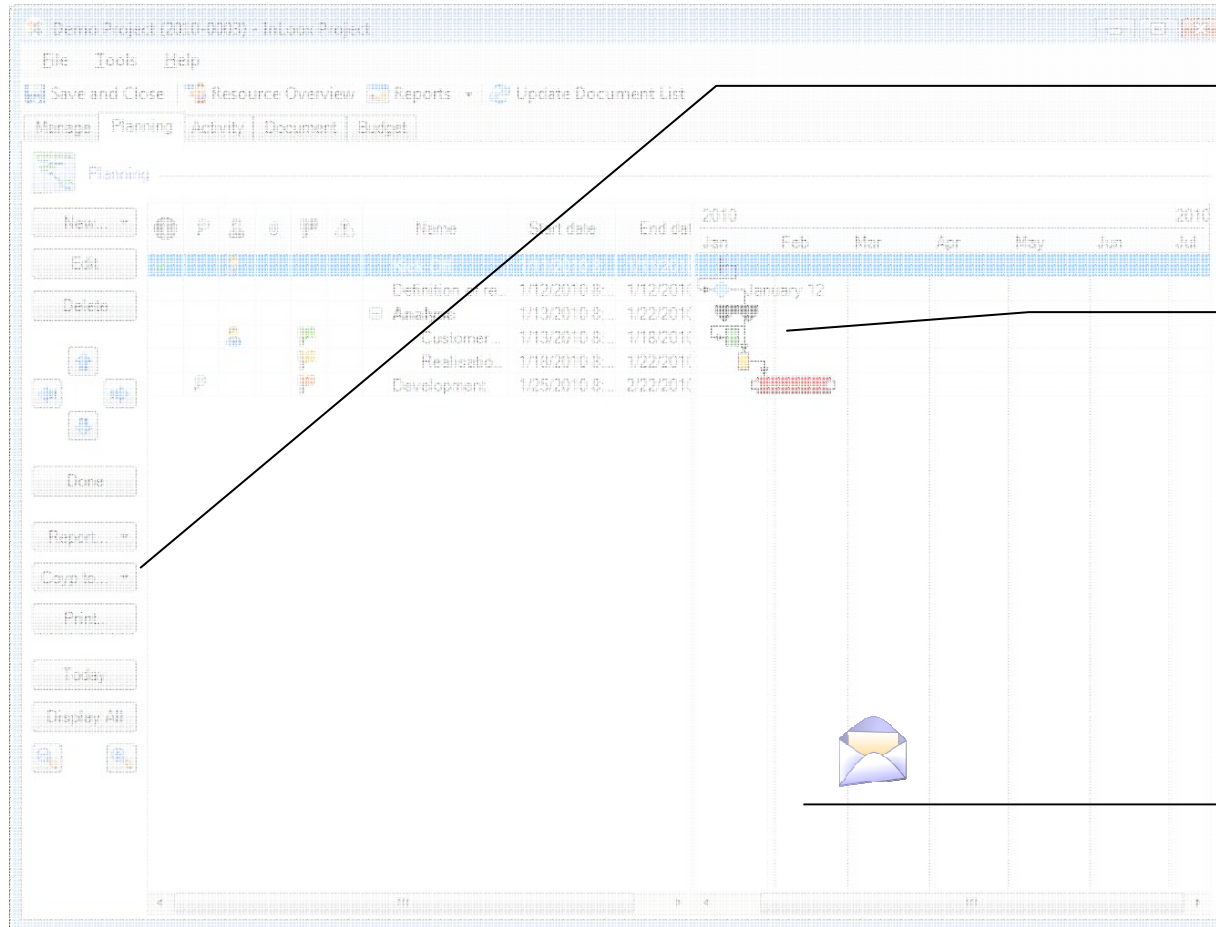
**Including Outlook data:**  
Free/busy-information, calendar dates for persons and devices and workload are calculated with regard to absences and vacation, using Outlook appointment information

Resource allocation and workload for each phase, infrastructure or device



Individual resources are shown by the resource workload diagram

The overview also indicates bottlenecks.

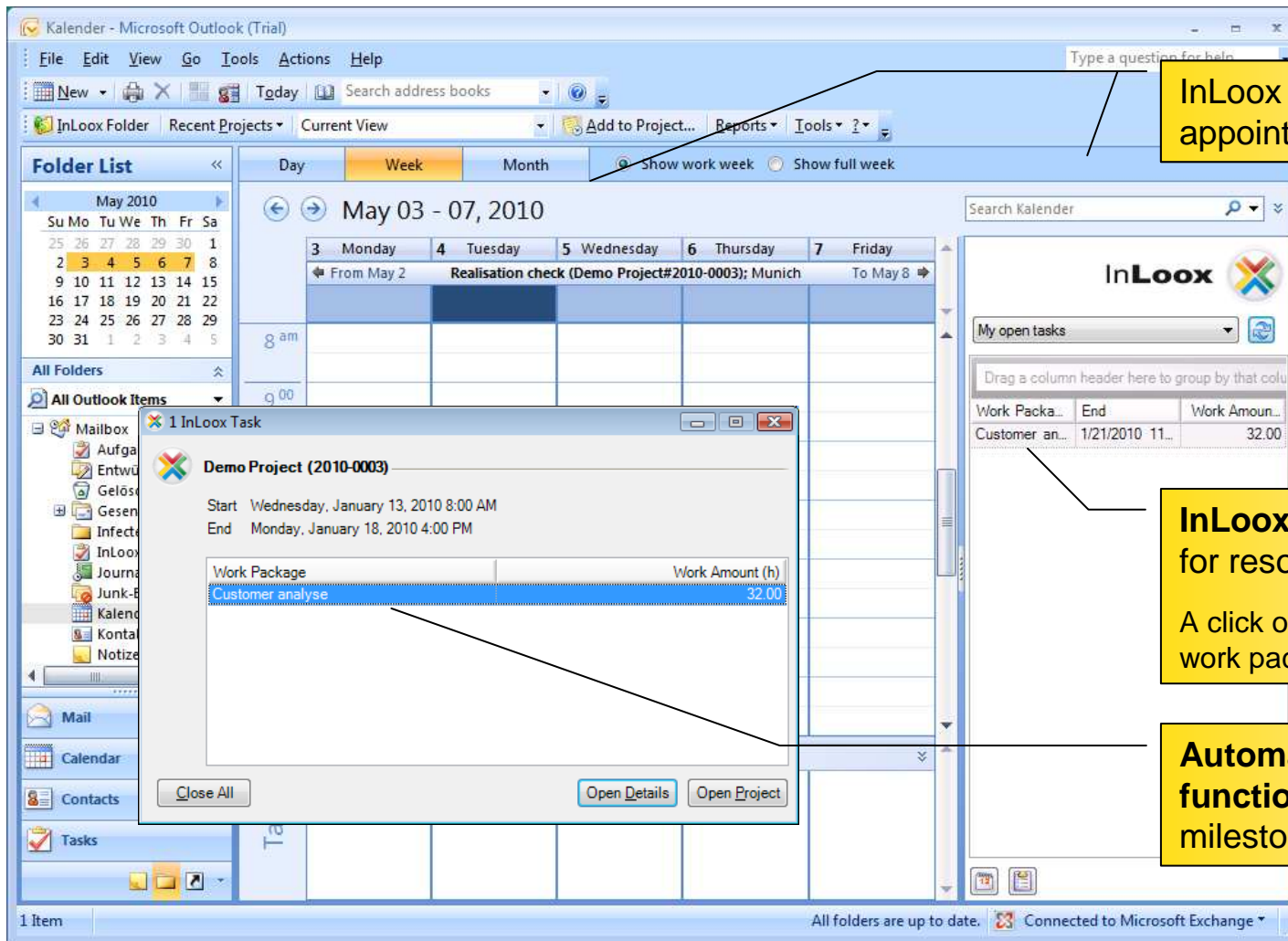


Transfer into the Outlook calendars of the involved persons and resources

InLoox communicates continuously with resources  
Alternatively by email or via internal notifications when the project plan changes



Internal and external resources

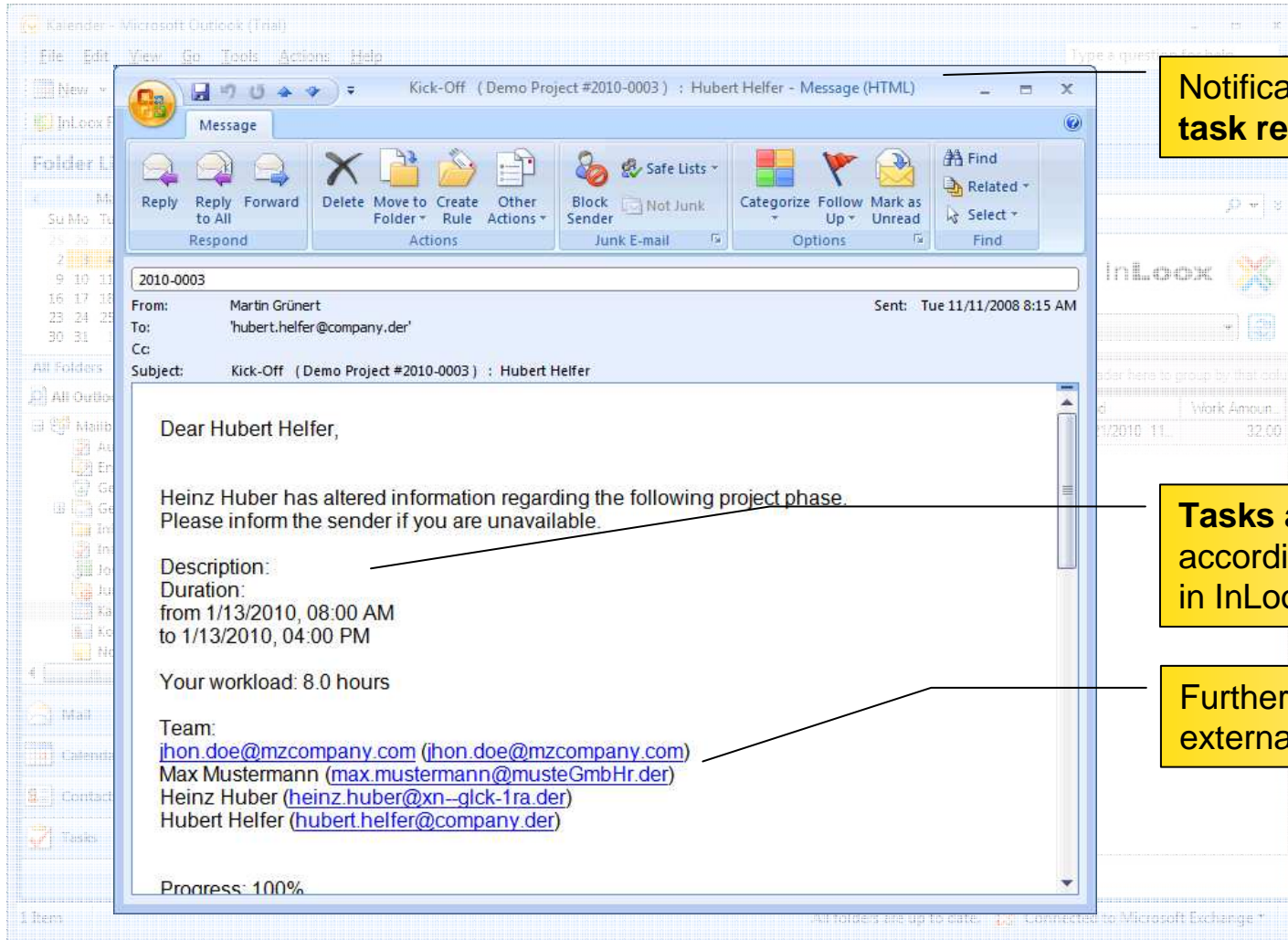


InLoox transfers tasks and appointments to Outlook

**InLoox Task Overview**  
for resources with InLoox

A click opens the project and the work package details

**Automatic reminder function** for phases and milestones



Notification of resources via task requests

Tasks and activities according to the description in InLoox

Further persons (also external) easily recognizable

Demo Project (2010-0003) - InLoox Project

File Tools Help

Save and Close Resource Overview Reports Update Document List

Manage Planning Activity Document Budget

Activities (overall duration: 35.00 hours)

New

Modify

Delete

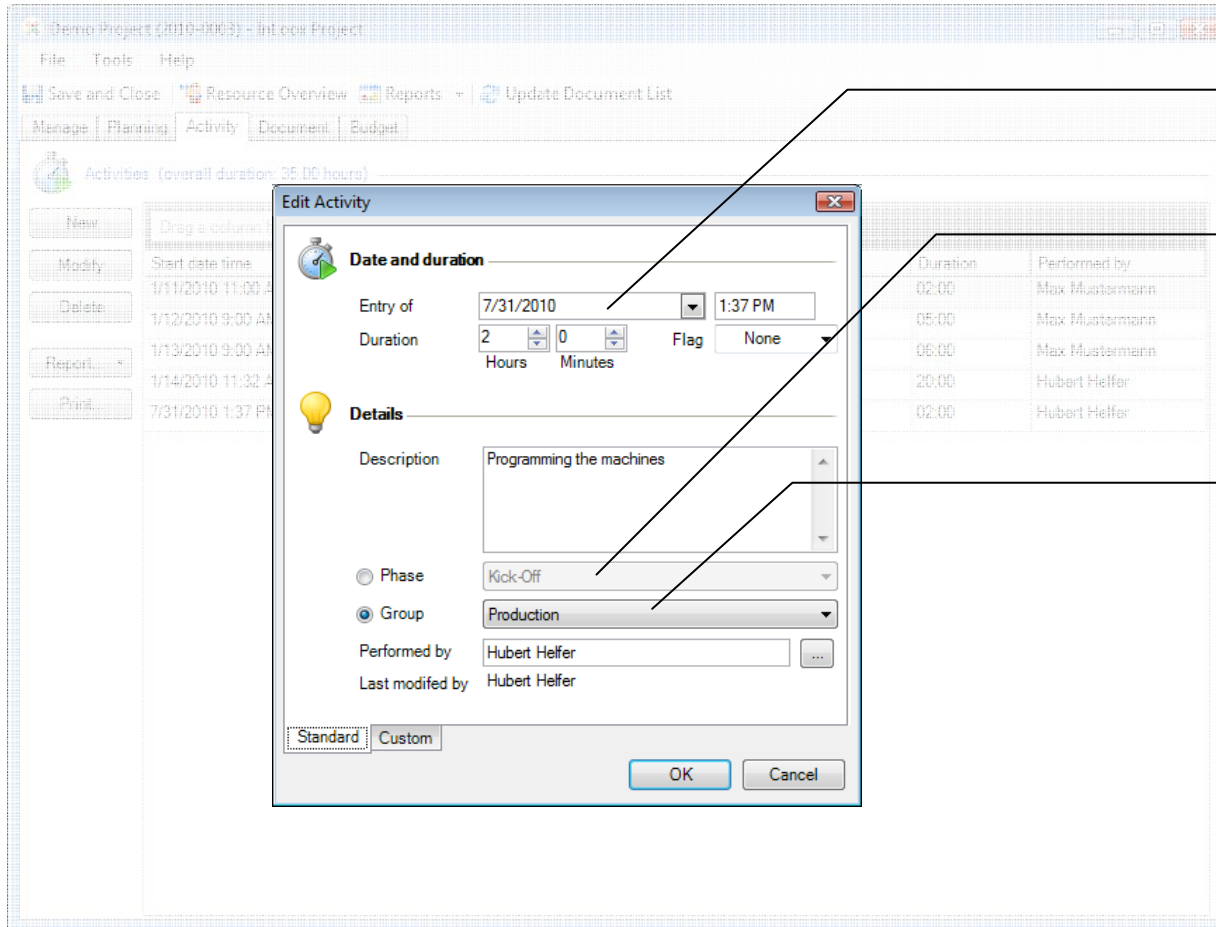
Report...

Print...

Start date time	End date time	Flag	Description	Duration	Performed by
1/11/2010 11:00 AM	1/11/2010 1:00 PM		First meeting with the customer	02:00	Max Mustermann
1/12/2010 9:00 AM	1/12/2010 2:00 PM		Specification definition	05:00	Max Mustermann
1/13/2010 9:00 AM	1/13/2010 3:00 PM		Specification creation	06:00	Max Mustermann
1/14/2010 11:32 AM	1/15/2010 7:32 AM		Creation of prototype part 1	20:00	Hubert Helfer
7/31/2010 1:37 PM	7/31/2010 3:37 PM		Programming the machines	02:00	Hubert Helfer

## Activity and time recording

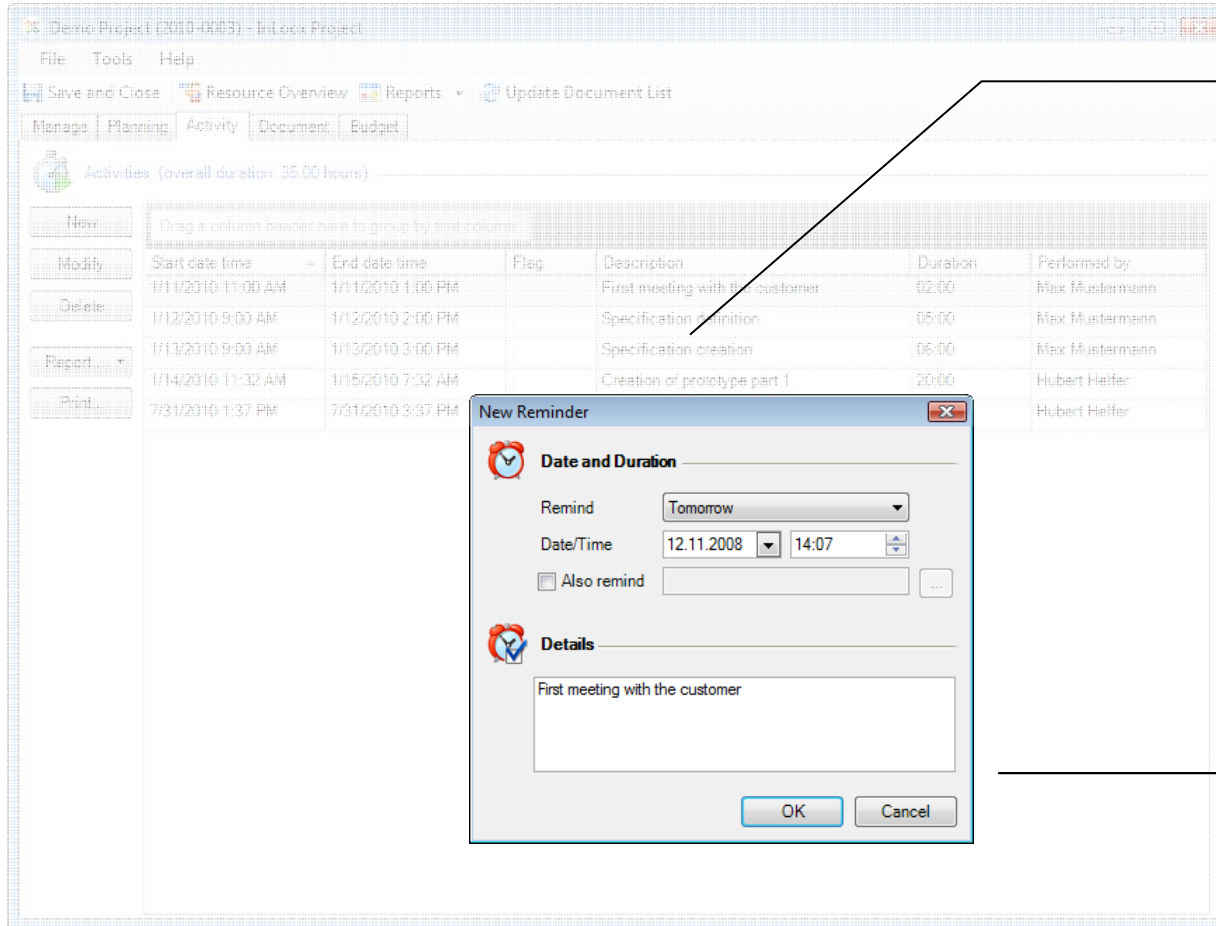
Project history containing all steps, gathered directly and conveniently from Outlook® calendars or inboxes



Time, date and duration of the activity

Activities can be linked to a project plan element. This way, status information is traceable with very little effort

Group (alternative)



The screenshot shows the InLoox software interface. At the top, there is a menu bar with 'File', 'Tools', and 'Help'. Below it are several toolbars, including 'Save and Close', 'Resource Overview', 'Reports', and 'Update Document List'. The main window displays a table of activities with columns for 'Start date time', 'End date time', 'Flag', 'Description', 'Duration', and 'Performed by'. A 'New Reminder' dialog box is open in the foreground, allowing users to set a reminder for a specific activity. The dialog has two sections: 'Date and Duration' and 'Details'.

Start date time	End date time	Flag	Description	Duration	Performed by
1/11/2010 11:00 AM	1/11/2010 1:00 PM		First meeting with the customer	02:00	Max Mustermann
1/12/2010 9:00 AM	1/12/2010 2:00 PM		Specification definition	05:00	Max Mustermann
1/13/2010 9:00 AM	1/13/2010 3:00 PM		Specification creation	06:00	Max Mustermann
1/14/2010 11:32 AM	1/15/2010 7:32 AM		Creation of prototype part 1	20:00	Hubert Helfer
7/31/2010 1:37 PM	7/31/2010 3:37 PM				Hubert Helfer

**New Reminder Dialog:**

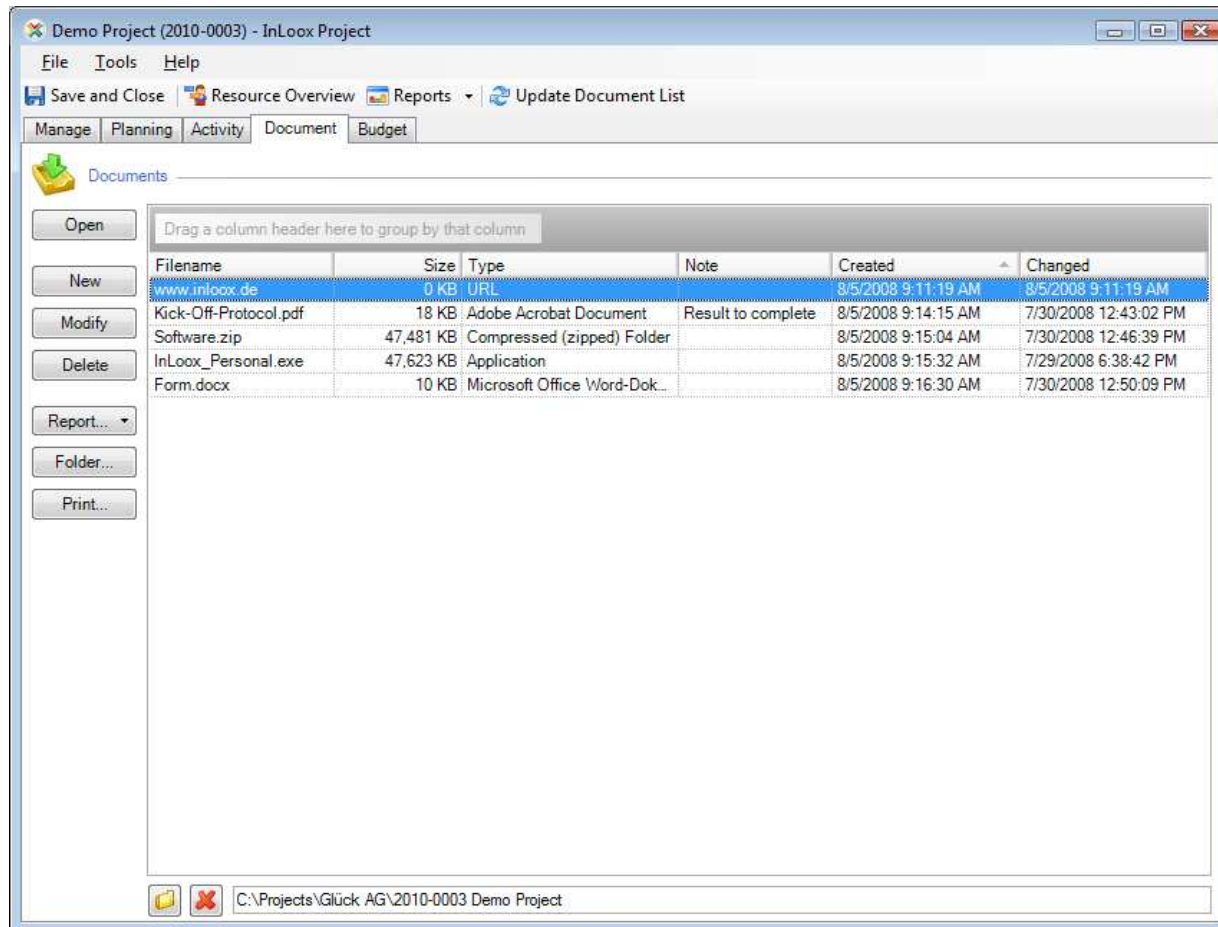
- Date and Duration:**
  - Remind: Tomorrow
  - Date/Time: 12.11.2008 14:07
  - Also remind
- Details:**
  - First meeting with the customer

## Reminder and status

A reminder function permits automatic follow-ups. Activity status information is collected

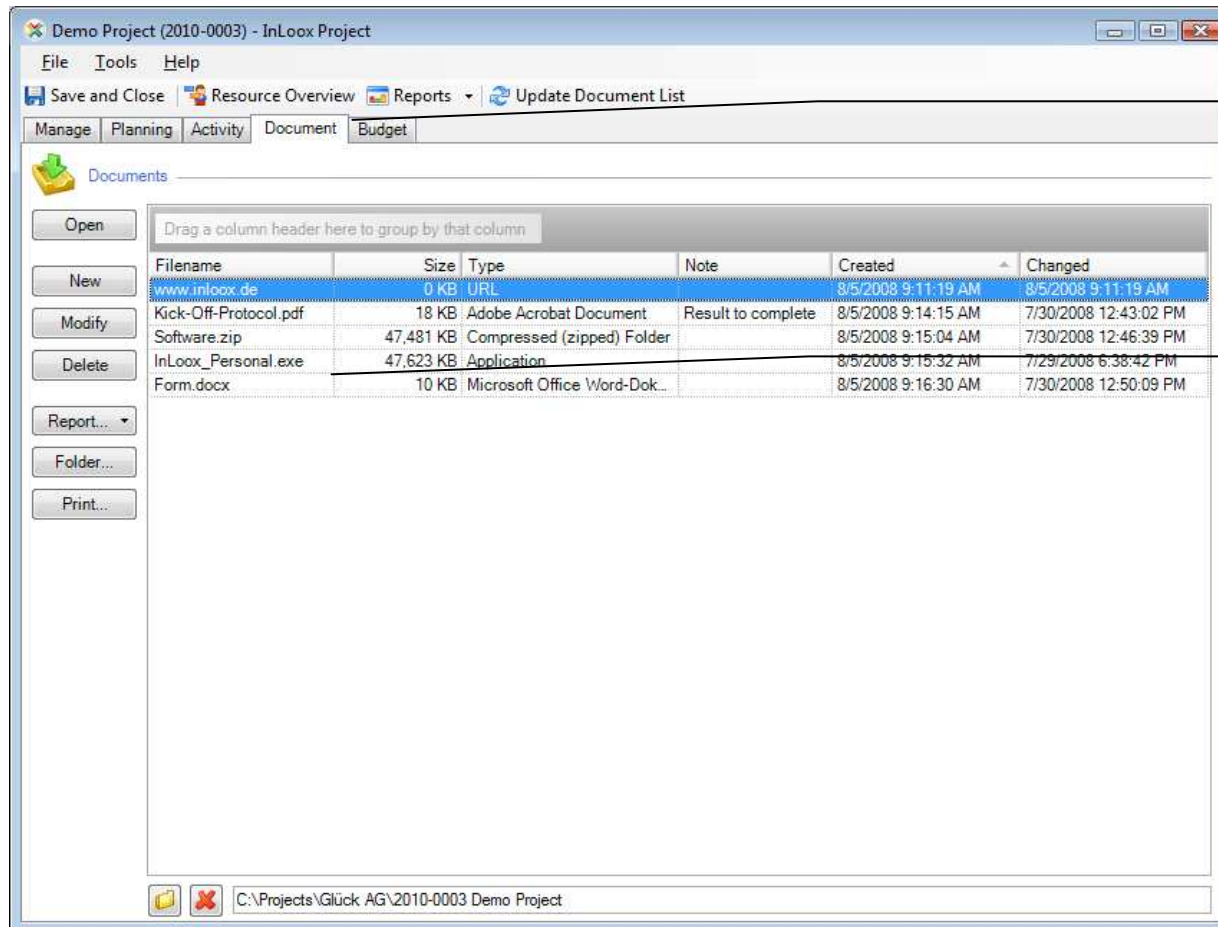


Outlook calendar



## File storage function

Files, links and Outlook elements can be assigned to the project

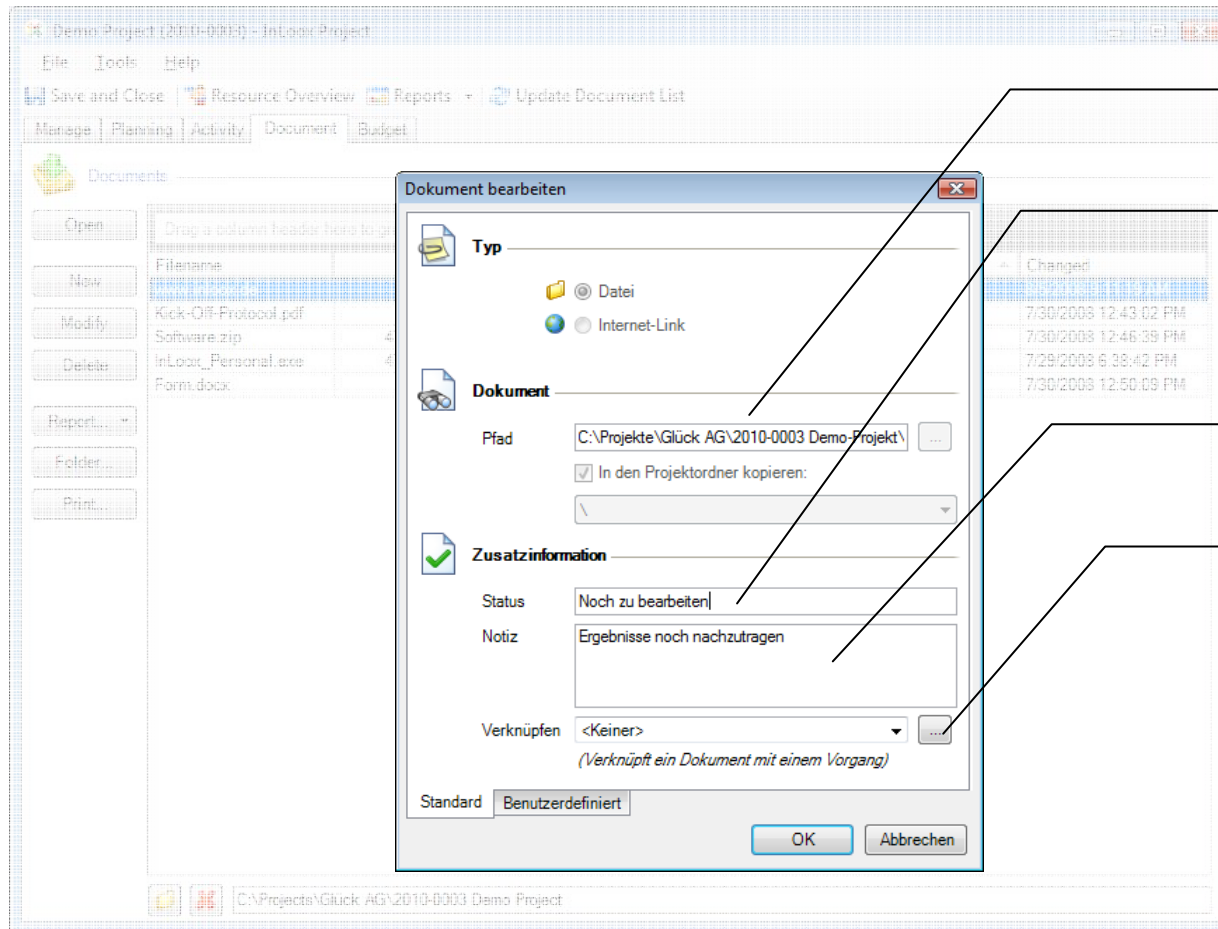


## Assign documents

All documents, emails, notes, protocols and reports of a project are stored centrally

## Supported types:

- local storage
- Outlook mailboxes and data files
- Microsoft Share Point Sites
- Internet links
- Storage on network shares
- File server, team shares, off-line files



Select a file

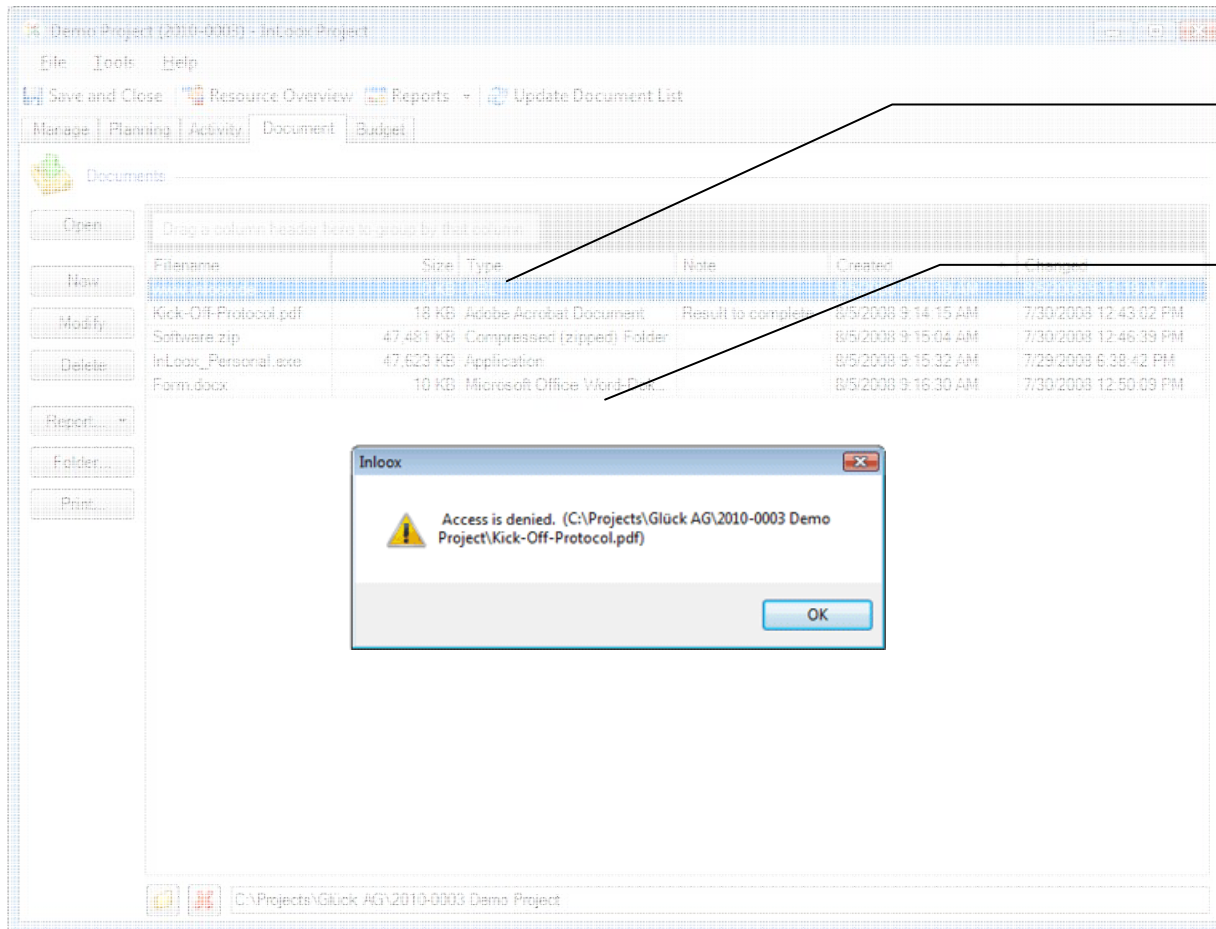
Freely-definable status

Authorisation required, New version, 30% completed, ...

Multi-line comments

Document can be linked with an activity

The documents can be called up easily and quickly from the activities



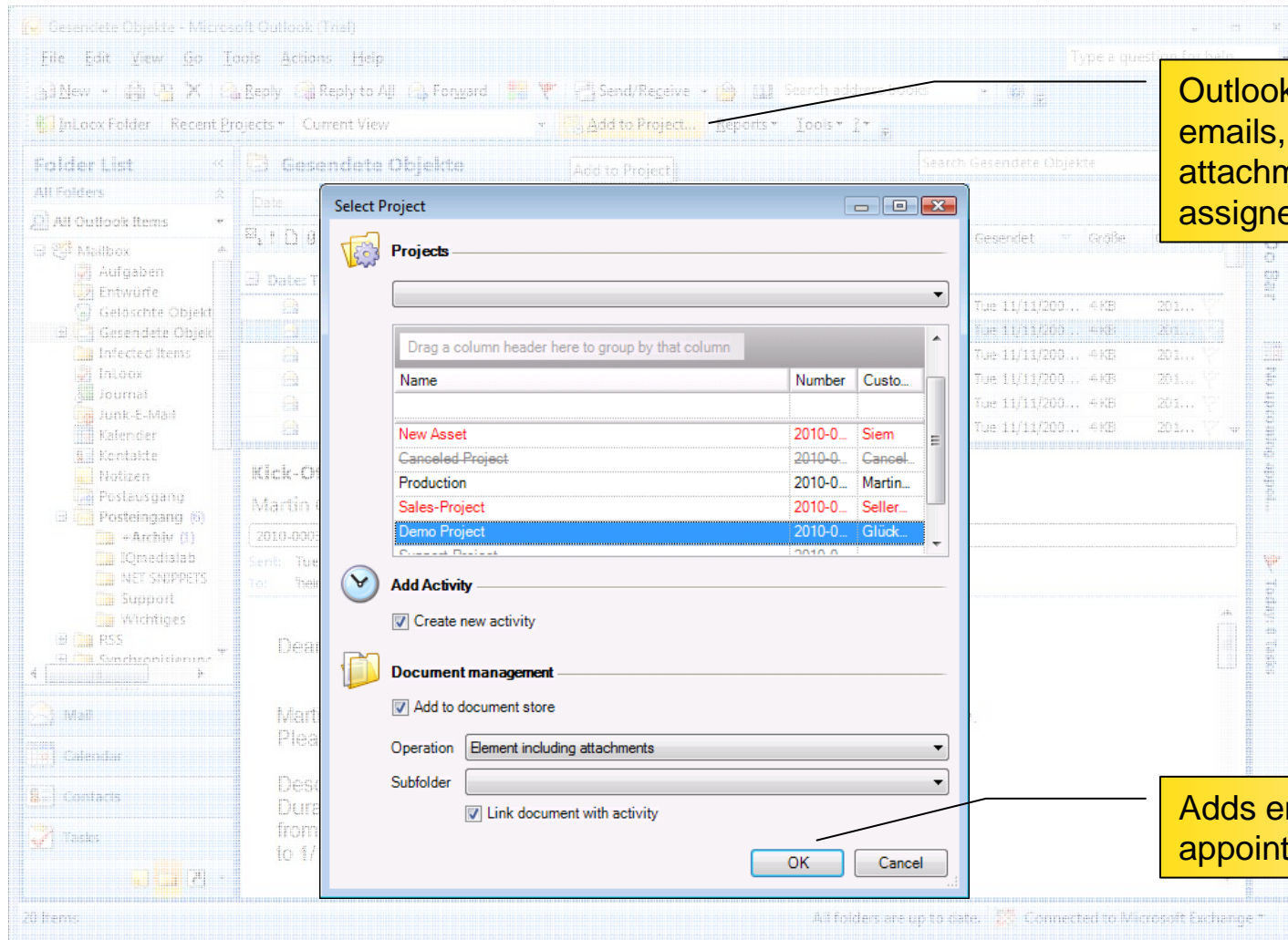
A double click opens the selected file...

... **only** if appropriate permissions are granted.

Existing restrictions of access are fully supported (e.g. depending on location, mailbox and/or login)

File permissions can be assigned directly from Outlook

Standard permissions (NTFS) and/or Active Directory security



Outlook items such as emails, including attachments, can be assigned to a project

Adds email, task or appointment to your project

Demo Project (2010-0003) - InLoox Project

File Tools Help

Save and Close Resource Overview Reports Update Document List

Manage Planning Activity Document Budget

Budgets

New

Modify

Delete

Report...

Print...

Overview

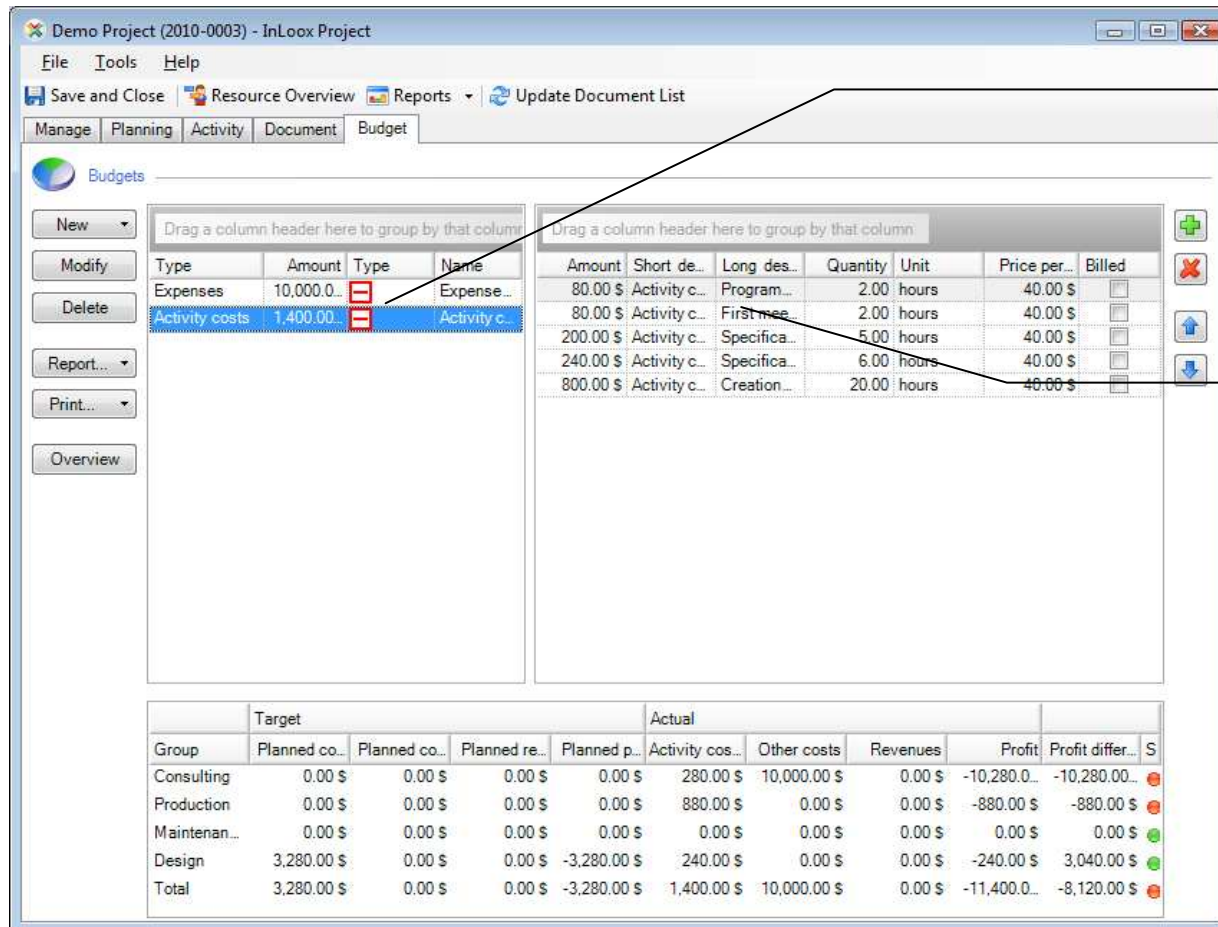
Type	Amount	Type	Name
Expenses	10,000.00		Expense...
Activity costs	1,400.00		Activity c...

Amount	Short de...	Long des...	Quantity	Unit	Price per...	Billed
80.00 \$	Activity c...	Program...	2.00	hours	40.00 \$	<input type="checkbox"/>
80.00 \$	Activity c...	First mee...	2.00	hours	40.00 \$	<input type="checkbox"/>
200.00 \$	Activity c...	Specifica...	5.00	hours	40.00 \$	<input type="checkbox"/>
240.00 \$	Activity c...	Specifica...	6.00	hours	40.00 \$	<input type="checkbox"/>
800.00 \$	Activity c...	Creation...	20.00	hours	40.00 \$	<input type="checkbox"/>

Group	Target				Actual		Revenues	Profit	Profit differ...	S
	Planned co...	Planned co...	Planned re...	Planned p...	Activity cos...	Other costs				
Consulting	0.00 \$	0.00 \$	0.00 \$	0.00 \$	280.00 \$	10,000.00 \$	0.00 \$	-10,280.00...	-10,280.00...	
Production	0.00 \$	0.00 \$	0.00 \$	0.00 \$	880.00 \$	0.00 \$	0.00 \$	-880.00 \$	-880.00 \$	
Maintenan...	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	
Design	3,280.00 \$	0.00 \$	0.00 \$	-3,280.00 \$	240.00 \$	0.00 \$	0.00 \$	-240.00 \$	3,040.00 \$	
Total	3,280.00 \$	0.00 \$	0.00 \$	-3,280.00 \$	1,400.00 \$	10,000.00 \$	0.00 \$	-11,400.0...	-8,120.00 \$	

## InLoox project budgets

Create, view and export costs, calculations and invoices easily



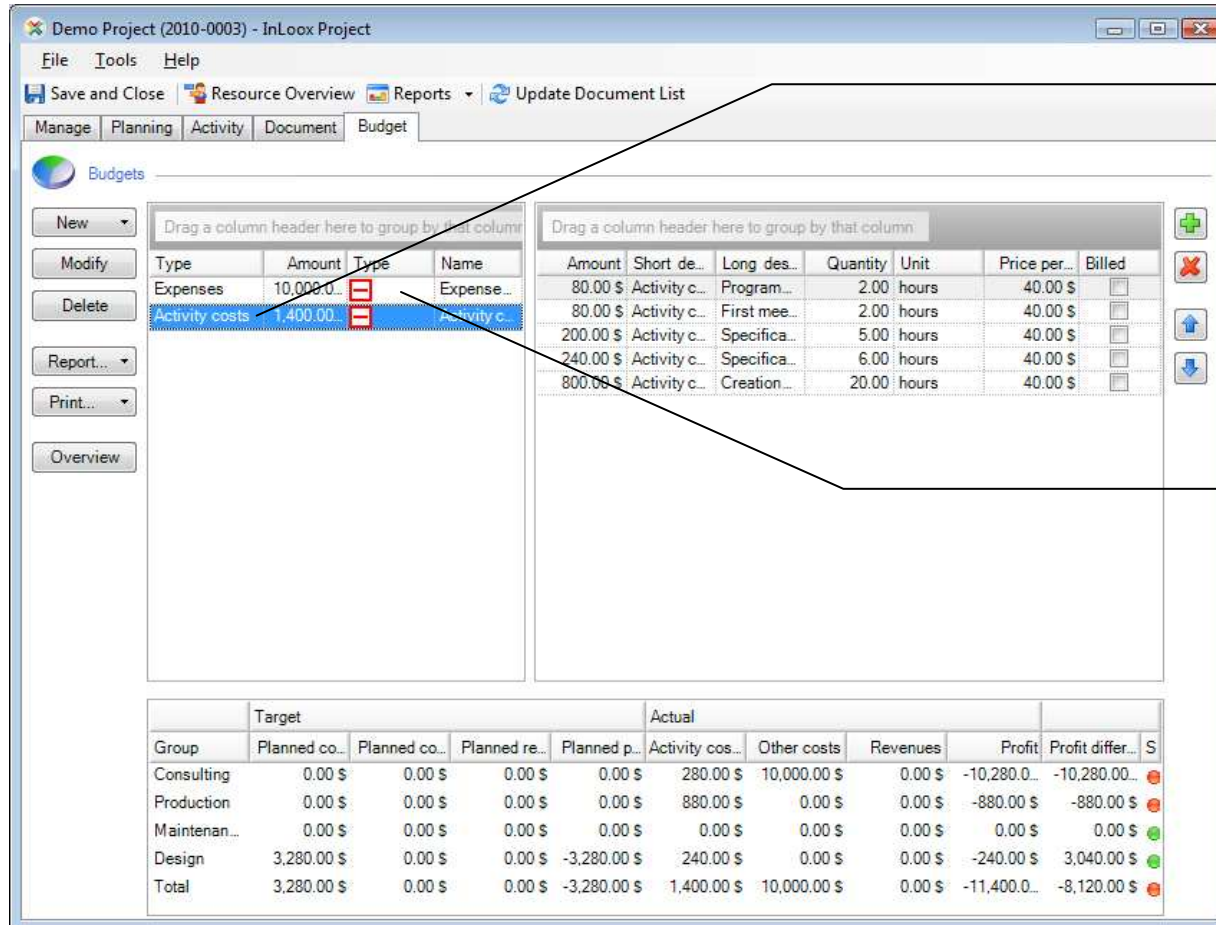
Group	Target				Actual				Profit	Profit differ...	S
	Planned co...	Planned co...	Planned re...	Planned p...	Activity cos...	Other costs	Revenues	Profit			
Consulting	0.00 \$	0.00 \$	0.00 \$	0.00 \$	280.00 \$	10,000.00 \$	0.00 \$	-10,280.0...	-10,280.00...		
Production	0.00 \$	0.00 \$	0.00 \$	0.00 \$	880.00 \$	0.00 \$	0.00 \$	-880.00 \$	-880.00 \$		
Maintenan...	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$		
Design	3,280.00 \$	0.00 \$	0.00 \$	-3,280.00 \$	240.00 \$	0.00 \$	0.00 \$	-240.00 \$	3,040.00 \$		
<b>Total</b>	<b>3,280.00 \$</b>	<b>0.00 \$</b>	<b>0.00 \$</b>	<b>-3,280.00 \$</b>	<b>1,400.00 \$</b>	<b>10,000.00 \$</b>	<b>0.00 \$</b>	<b>-11,400.0...</b>	<b>-8,120.00 \$</b>		

Project costs are organized in budgets:

- Costs
- Calculations
- Bills

Budgets contain any number of assets

Each budget and each asset has a clear identification number



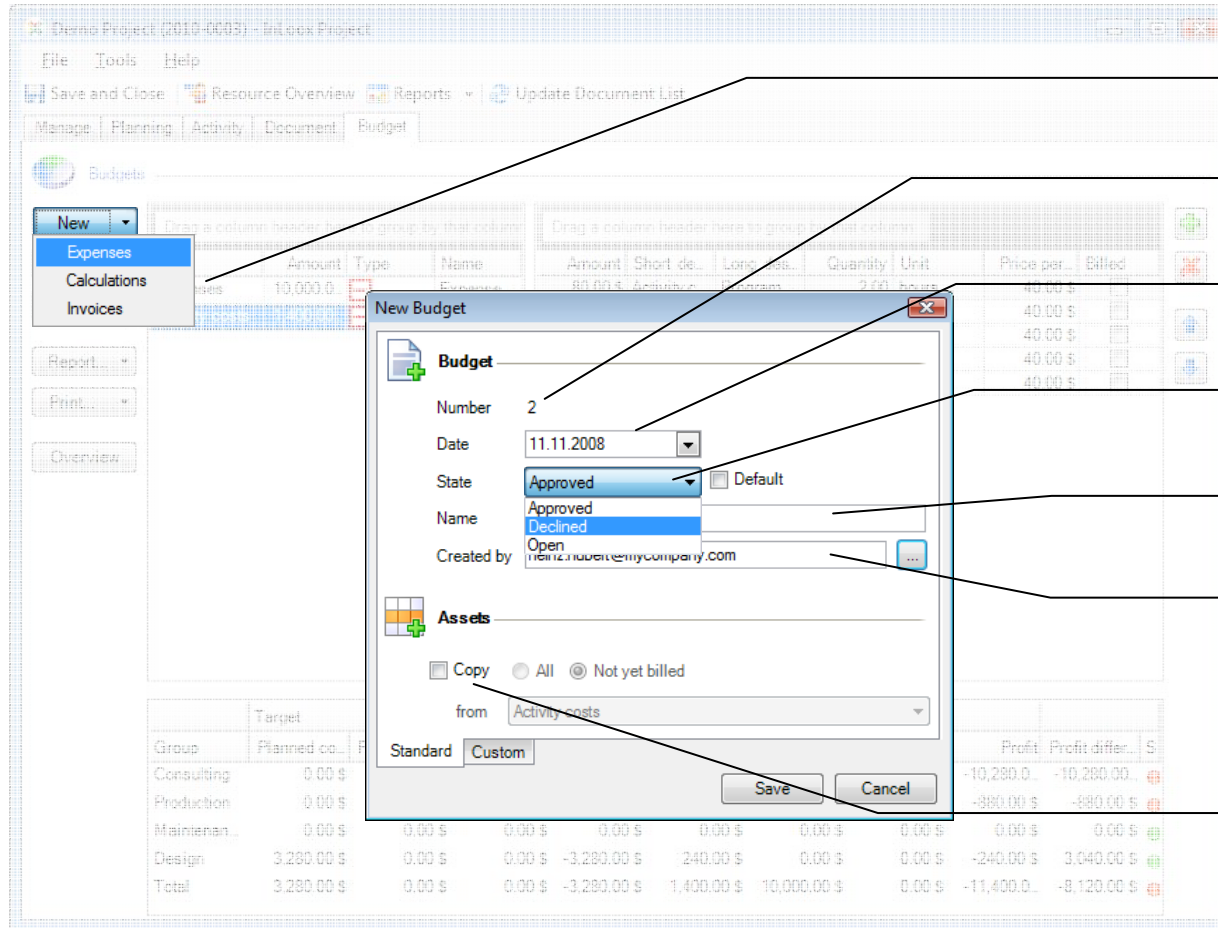
The screenshot shows the InLoox software interface for a 'Demo Project (2010-0003)'. The 'Budget' tab is active, displaying a table of expenses and activity costs. A callout box points to the 'Activity costs' row in the table, which is highlighted in blue. Below the main table, there is a summary table with columns for 'Target' and 'Actual' costs, revenues, and profits for various project groups.

Group	Target				Actual					
	Planned co...	Planned co...	Planned re...	Planned p...	Activity cos...	Other costs	Revenues	Profit	Profit differ...	S
Consulting	0.00 \$	0.00 \$	0.00 \$	0.00 \$	280.00 \$	10,000.00 \$	0.00 \$	-10,280.0...	-10,280.00...	
Production	0.00 \$	0.00 \$	0.00 \$	0.00 \$	880.00 \$	0.00 \$	0.00 \$	-880.00 \$	-880.00 \$	
Maintenan...	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	
Design	3,280.00 \$	0.00 \$	0.00 \$	-3,280.00 \$	240.00 \$	0.00 \$	0.00 \$	-240.00 \$	3,040.00 \$	
<b>Total</b>	<b>3,280.00 \$</b>	<b>0.00 \$</b>	<b>0.00 \$</b>	<b>-3,280.00 \$</b>	<b>1,400.00 \$</b>	<b>10,000.00 \$</b>	<b>0.00 \$</b>	<b>-11,400.0...</b>	<b>-8,120.00 \$</b>	

Activity costs are collected automatically

InLoox calculates to ratio of amounts not billed yet

Identify concealed project costs and control your profits  
The project manager decides about billing them to the customer



Budget document type

Unique identifier

Date

Status

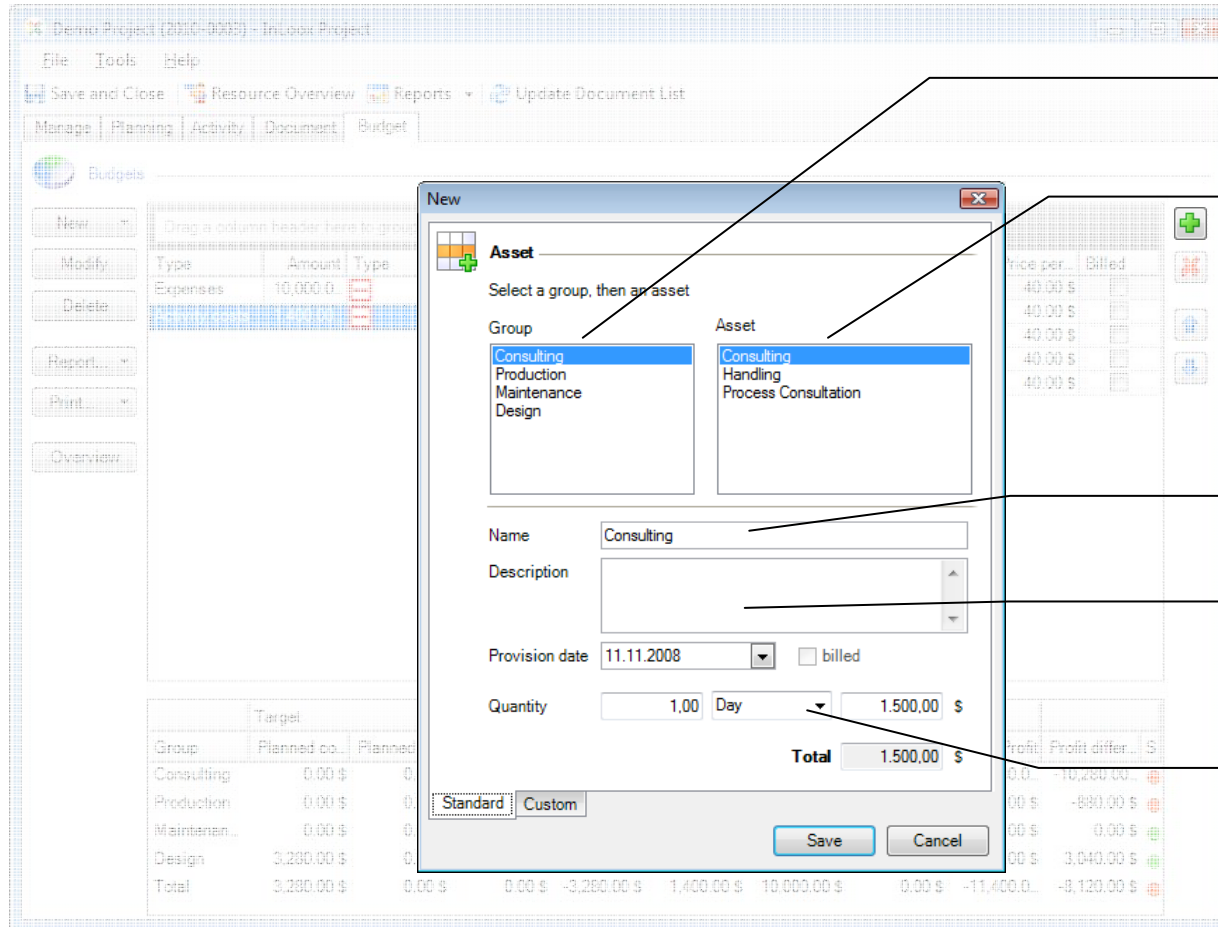
Name or short description

Author identification:

MS Exchange/Outlook user name

Transfer assets from existing budgets:

- not yet billed
- all



Group of the assets

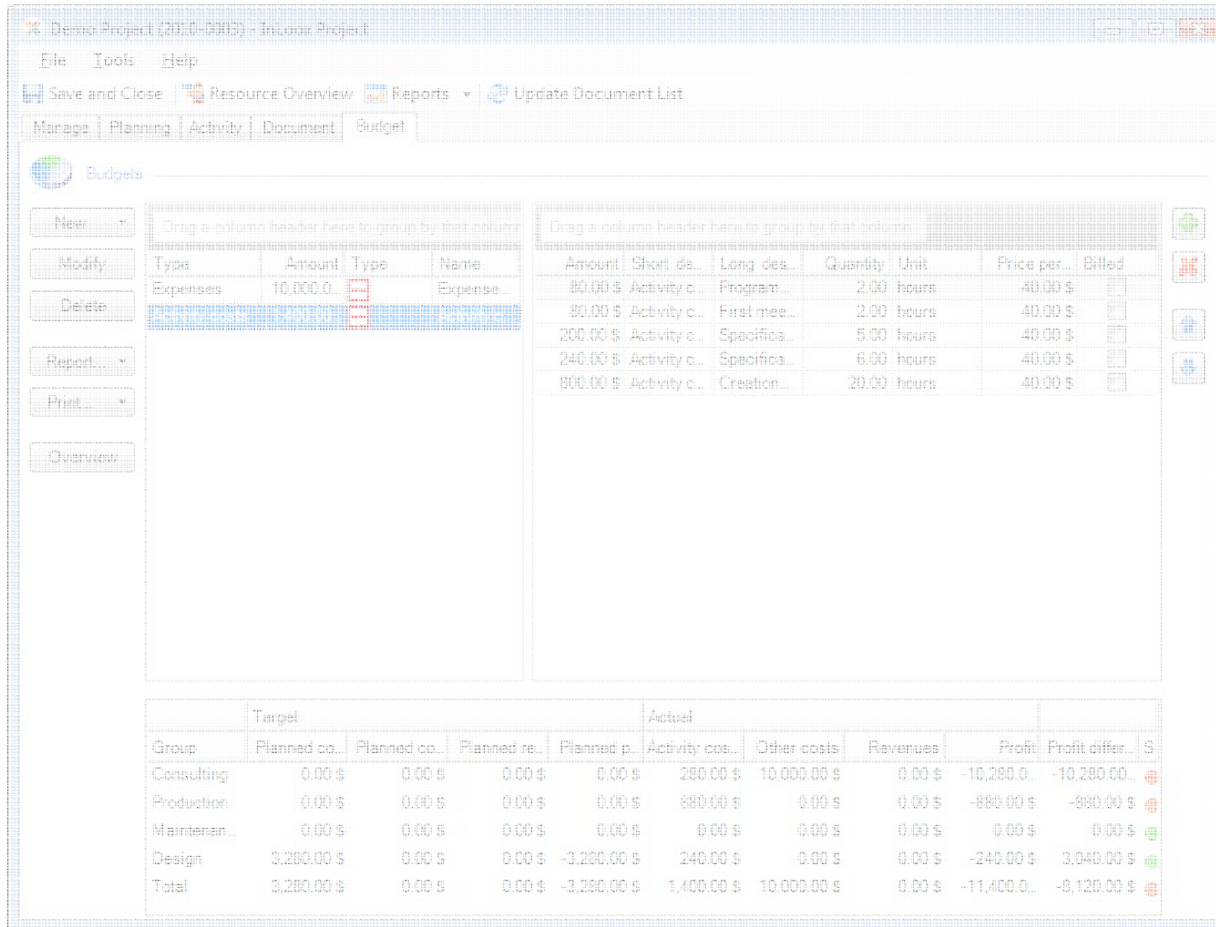
Asset names  
 InLoox automatically loads prices, description, amount and units. A company wide budget asset list is created

Budget asset name

Multi-line description

Freely-definable units, e.g.:

- Minutes, days, months, ...
- Meter, inches, parts, ...



The screenshot shows the 'Budgets' section of the InLoox software. It features a main table with columns for 'Type', 'Amount', 'Type', 'Name', 'Amount', 'Short des.', 'Long des.', 'Quantity', 'Unit', 'Price per...', and 'Billed'. Below this is a summary table with columns for 'Group', 'Target', and 'Actual'.

Group	Target				Actual					
	Planned co...	Planned co...	Planned re...	Planned p...	Activity cos...	Other costs	Revenues	Profit	Profit differ...	\$
Consulting	0.00 \$	0.00 \$	0.00 \$	0.00 \$	280.00 \$	10,000.00 \$	0.00 \$	-10,280.00 \$	-10,280.00 \$	
Production	0.00 \$	0.00 \$	0.00 \$	0.00 \$	880.00 \$	0.00 \$	0.00 \$	-880.00 \$	-880.00 \$	
Maintenan...	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	
Design	3,280.00 \$	0.00 \$	0.00 \$	-3,280.00 \$	240.00 \$	0.00 \$	0.00 \$	-240.00 \$	3,040.00 \$	
<b>Total</b>	<b>3,280.00 \$</b>	<b>0.00 \$</b>	<b>0.00 \$</b>	<b>-3,280.00 \$</b>	<b>1,400.00 \$</b>	<b>10,000.00 \$</b>	<b>0.00 \$</b>	<b>-11,400.00 \$</b>	<b>-8,120.00 \$</b>	

## Live project overview

All costs (actual, target) as well as budgets are transparent – at any time, at any level of detail

Group	Target				Actual				Profit	Profit differ...	S
	Planned co...	Planned co...	Planned re...	Planned p...	Activity cos...	Other costs	Revenues	Profit			
Consulting	0.00 \$	0.00 \$	0.00 \$	0.00 \$	280.00 \$	10,000.00 \$	0.00 \$	-10,280.00...	-10,280.00...	🔴	
Production	0.00 \$	0.00 \$	0.00 \$	0.00 \$	880.00 \$	0.00 \$	0.00 \$	-880.00 \$	-880.00 \$	🔴	
Maintenan...	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	🟢	
Design	3,280.00 \$	0.00 \$	0.00 \$	-3,280.00 \$	240.00 \$	0.00 \$	0.00 \$	-240.00 \$	3,040.00 \$	🟢	
<b>Total</b>	<b>3,280.00 \$</b>	<b>0.00 \$</b>	<b>0.00 \$</b>	<b>-3,280.00 \$</b>	<b>1,400.00 \$</b>	<b>10,000.00 \$</b>	<b>0.00 \$</b>	<b>-11,400.0...</b>	<b>-8,120.00 \$</b>	🔴	

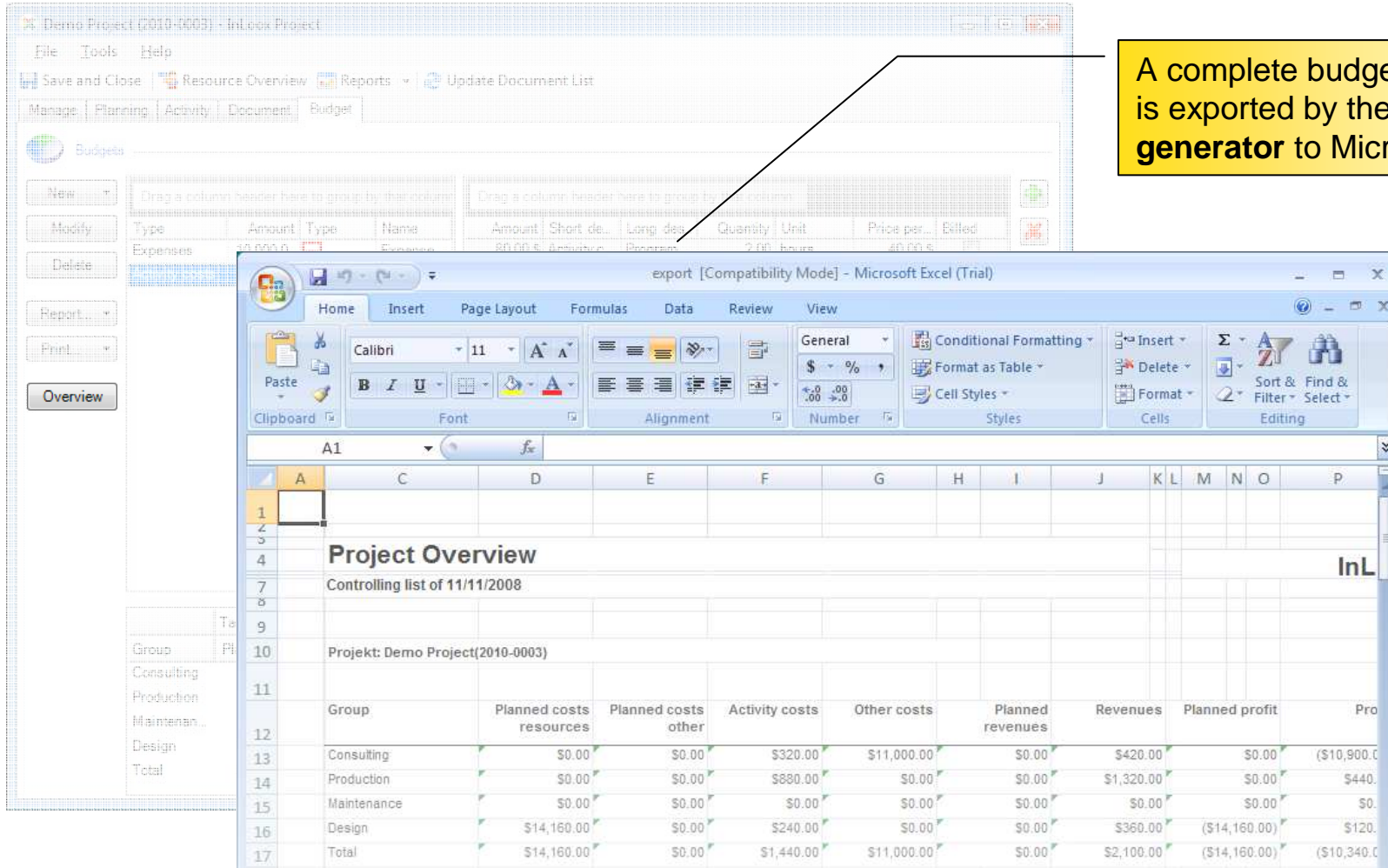
Estimation / planned amount  
Resources and additional costs

Actual amount  
Resources and additional costs

Comparison between  
plan and actual costs

Cost overruns are  
highlighted in red

Multi-currency support:  
EUR, \$, CHF, ...



A complete budget overview is exported by the **report generator** to Microsoft Excel

Group	Planned costs resources	Planned costs other	Activity costs	Other costs	Planned revenues	Revenues	Planned profit	Pro
Consulting	\$0.00	\$0.00	\$320.00	\$11,000.00	\$0.00	\$420.00	\$0.00	(\$10,900.00)
Production	\$0.00	\$0.00	\$880.00	\$0.00	\$0.00	\$1,320.00	\$0.00	\$440.00
Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Design	\$14,160.00	\$0.00	\$240.00	\$0.00	\$0.00	\$360.00	(\$14,160.00)	\$120.00
<b>Total</b>	<b>\$14,160.00</b>	<b>\$0.00</b>	<b>\$1,440.00</b>	<b>\$11,000.00</b>	<b>\$0.00</b>	<b>\$2,100.00</b>	<b>(\$14,160.00)</b>	<b>(\$10,340.00)</b>

- Standard product since 2003
- Worldwide installations: +25.000 users
- User interface in seven languages
- Used by the following companies:



- More references and case studies:
  - <http://www.inloox.com>

# Thank you for your interest in InLoox

## Your contact person

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