



# **Project management – integrated into Outlook**

## InLoox PM 7.x Installation Guide

An InLoox Whitepaper

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You can find up-to-date information at <http://www.inloox.com>

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## General information

The current available version of InLoox PM is fundamentally different from predecessor generations of the product. Numerous innovations were realized together with customers and partners.

Supported database management systems with network usage are:

- Microsoft SQL Server (all versions and editions of SQL server 2005, 2008 and 2008 R2)
- Oracle (versions 11g, 10g, 9i, 8i, 8.0, including „personal“, „express“ and „x64“- editions)
- MySQL (versions 5.0)

The database schema of *InLoox PM Workgroup/Enterprise Edition* is ready for offline and clustering usage.

With SQL Compact Edition a compact and efficient database is available for single place usage, which can be used free of charge.

InLoox PM is internationalized and is on hand in different language versions. Region and language settings are supported for each user location. Thus the foundations for a global usage are laid.

## System Requirements

### Server (only for *InLoox PM Workgroup/Enterprise Edition*)

The hard- and software requirements depend on the used database system. Please consult the product documentation of the appropriate manufacturer for valid requirements.

All manufacturers, supported by InLoox PM, offer a free database product:

- Microsoft SQL Server express edition
- Oracle Express Edition
- MySQL Community Edition

### Client

For installation Windows XP (with Service Pack 3) or higher and Office 2003 or higher is required. InLoox also supports Windows 7, Office 2007, Office 2010 (32Bit & 64Bit), Terminal Server as well as the 64Bit versions of Windows XP, Windows Vista and Windows 7.

The system requirements depend on the used versions.

InLoox PM automatically installs Microsoft .NET Framework 2.0 SP1 on 32Bit systems as a prerequisite.

On 64Bit systems you have to install the .Net Framework 2.0 SP1 manually e.g. over the Windows updates.

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## **Upgrade/migration of existing projects**

### **Upgrade of InLoox 5.x or 6.x**

Please create a backup of the current Database

The setup offers a dialog to perform an upgrade on InLoox 5.x and InLoox 6.x databases.

You can find a detailed guide under: <http://www.inloox.com/download/upgrade5to6/>

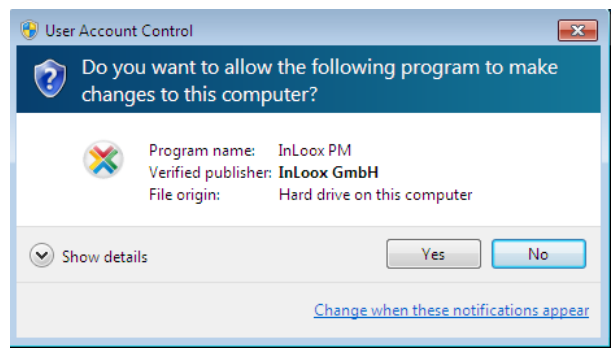
### **Upgrade of older versions**

An Upgrade from older versions is not supported.

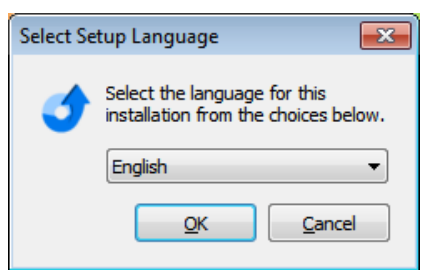
# Installation

## InLoox PM Personal Edition (single place version)

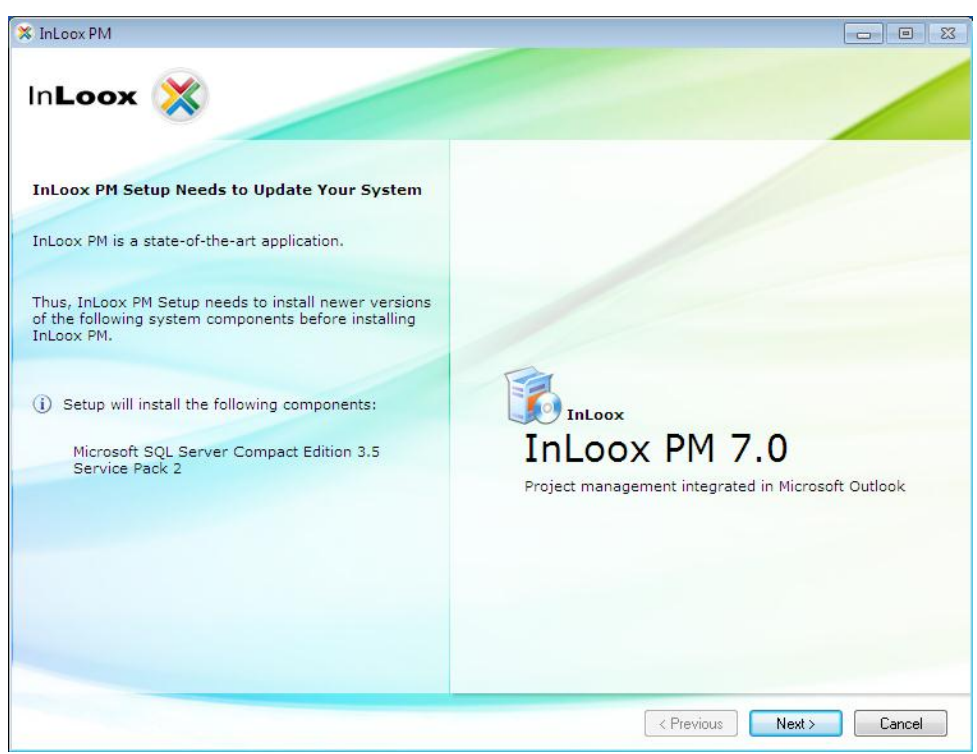
1. Run `InLoox_PM_Personal.exe`
2. The dialog of the „User Account Control“ appears under Windows 7. Click on “Yes”



3. The installation assistant is started  
Select the desired installation language (e.g. “English”)



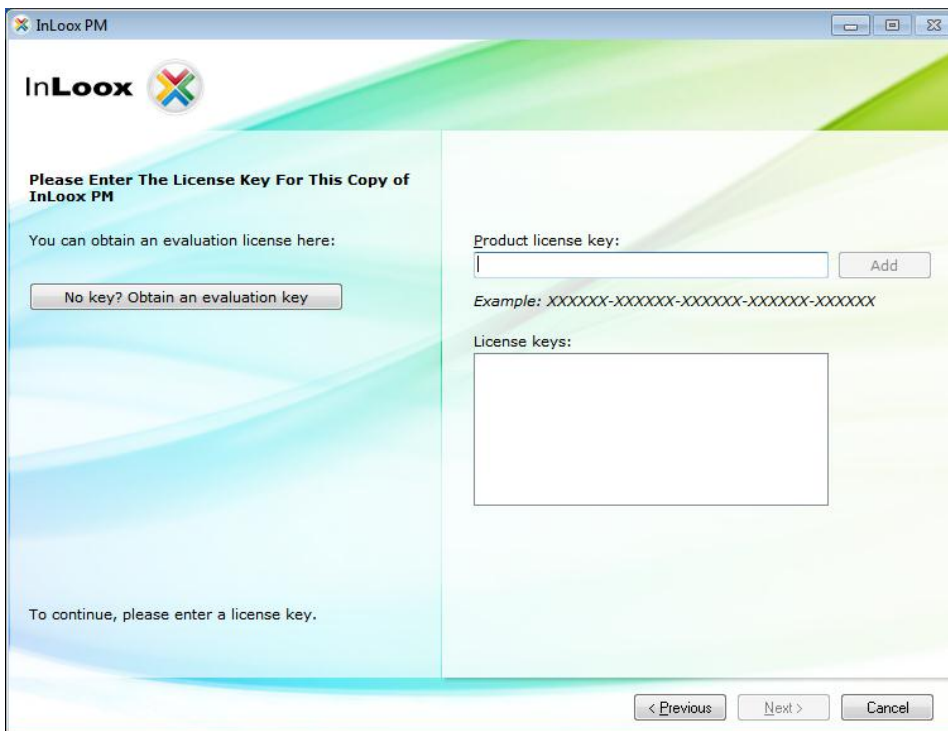
4. The system requirements are examined and if necessary components are installed. Click on “Next”. The installation can take several minutes depending on extent.



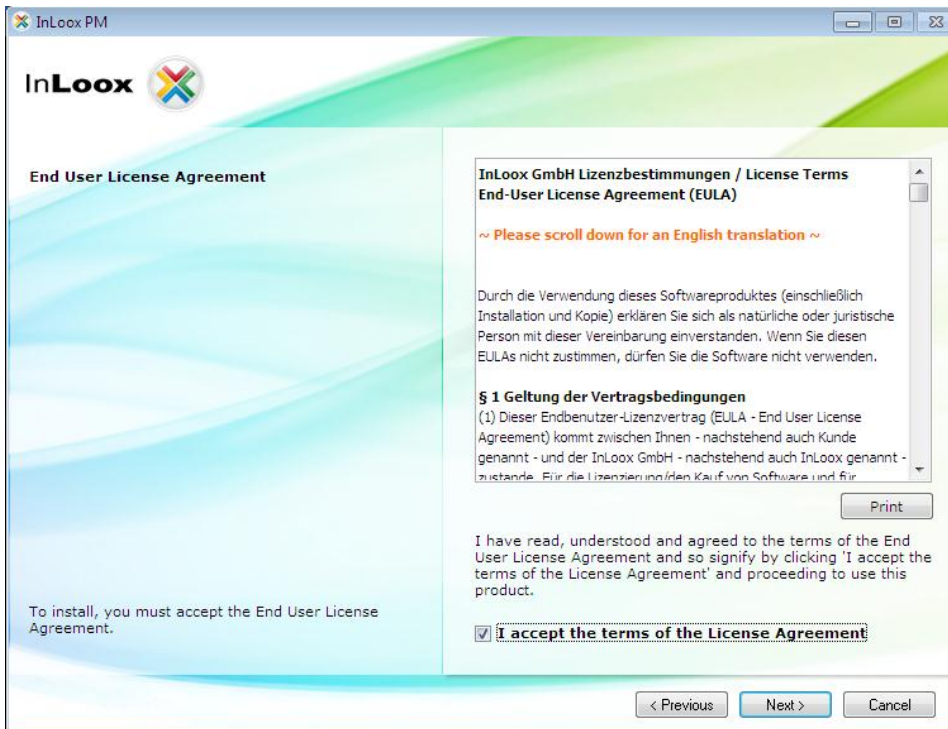
5. Click on „Next“



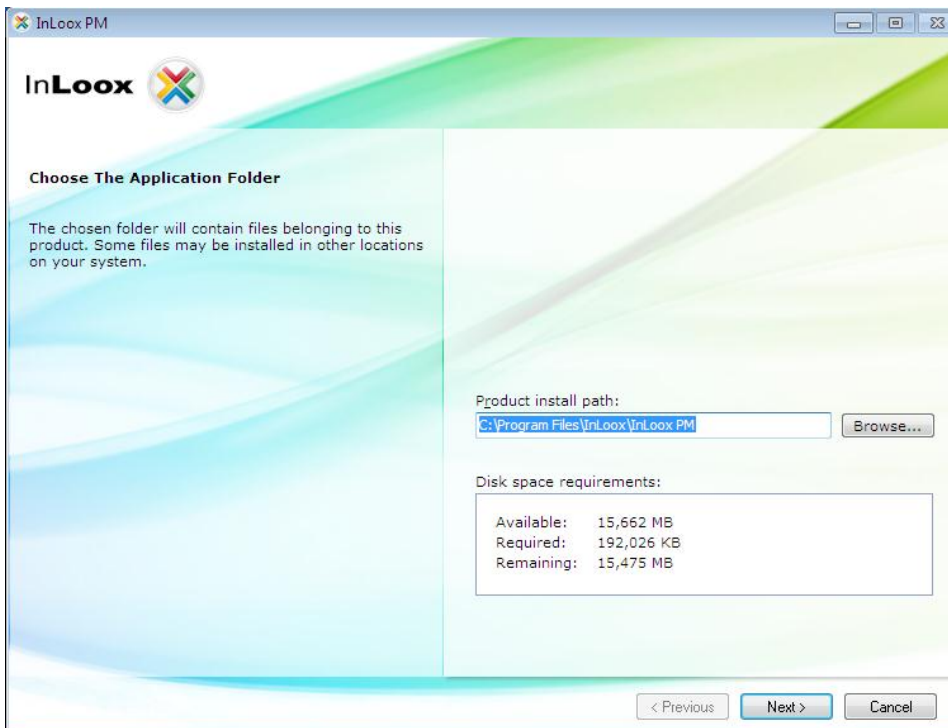
6. Enter your InLoox PM license key(s) and click “Add”, afterwards click on “Next”



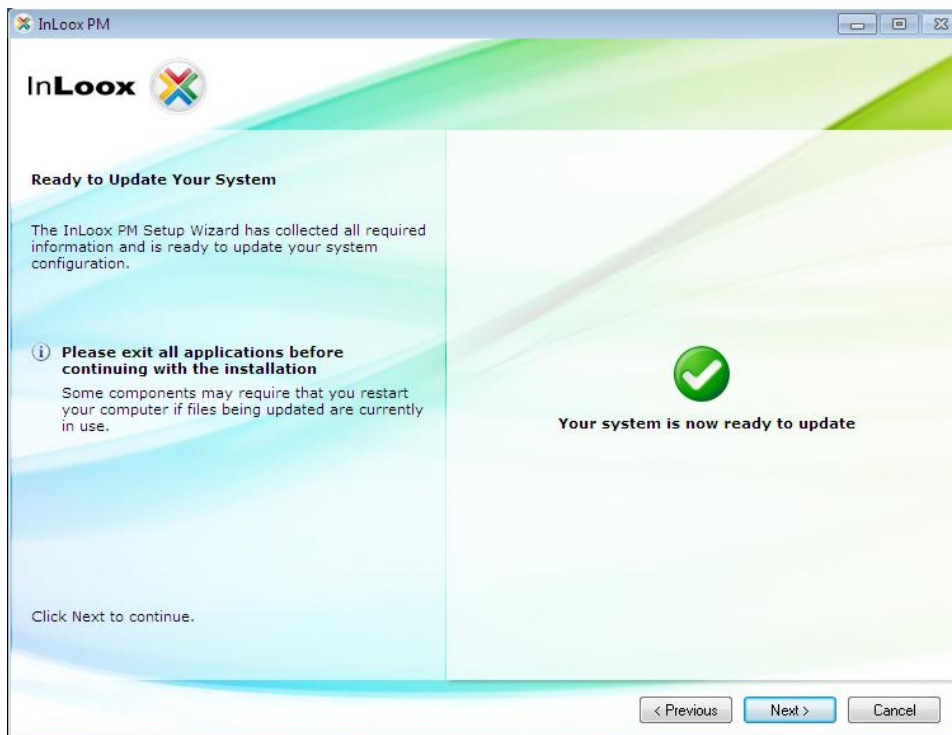
7. Click on “I accept the terms of the License Agreement”, then on “Next”



8. If desired change the standard path and click on “Next”



9. Click on „Next“

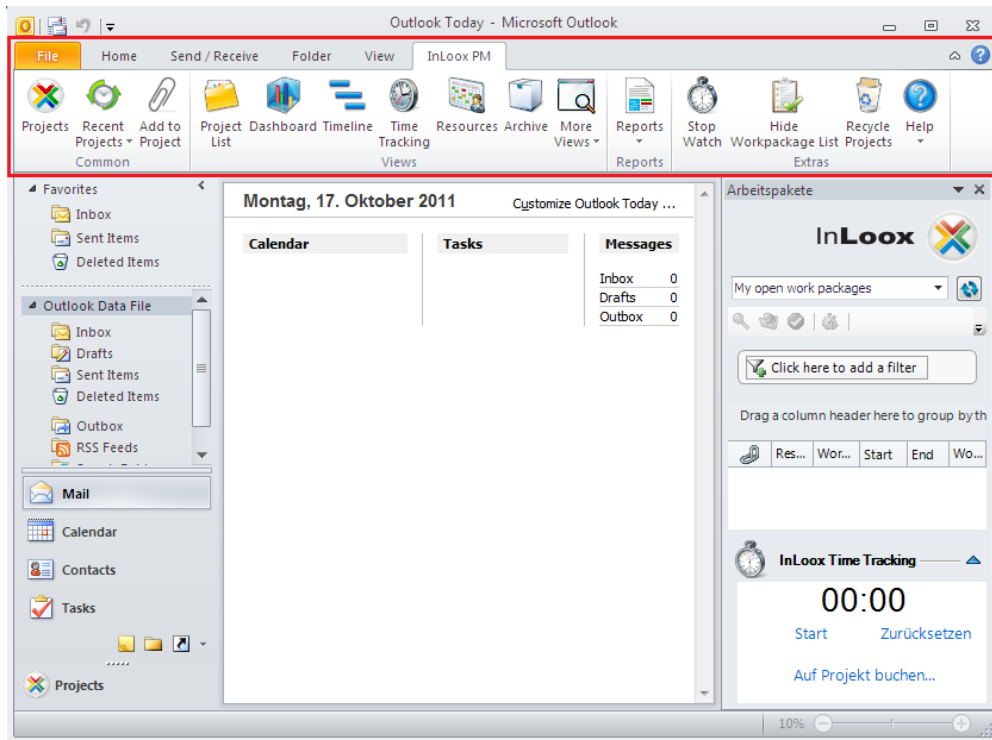


10. Click on „Finish“

11.



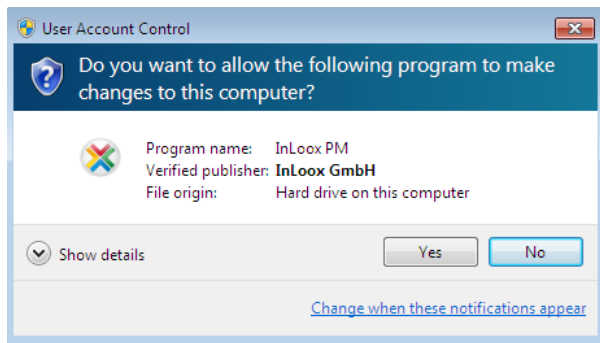
12. Start Outlook and you will see the InLoox PM Ribbon



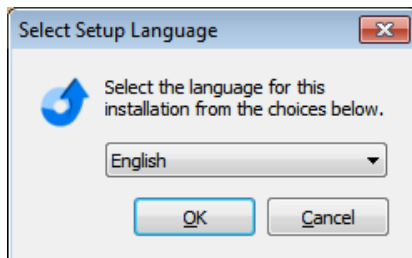
## InLoox PM Workgroup/Enterprise Edition (Network version)

*Important note: Please install the database server in advance.* See chapter „System requirements/Server“. All manufacturers, supported by InLoox, offer a free database product, which is ready for use within a few minutes.

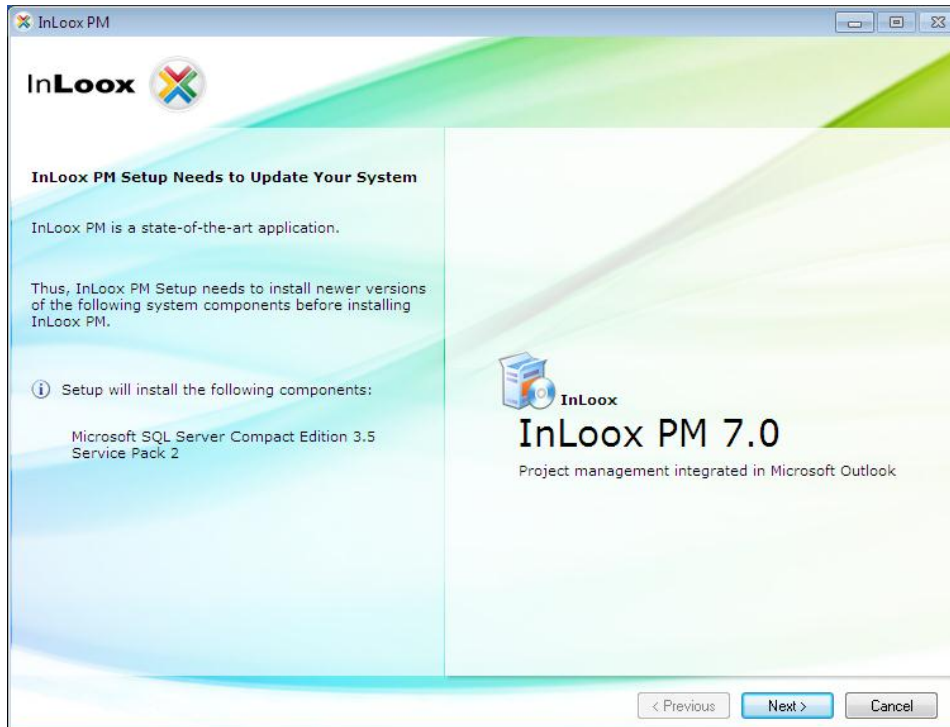
1. Run `InLoox_PM_WorkgroupEnterprise.exe`
2. Under Windows Vista the dialog of the „User Account Control“ appears. Click on **Continue**



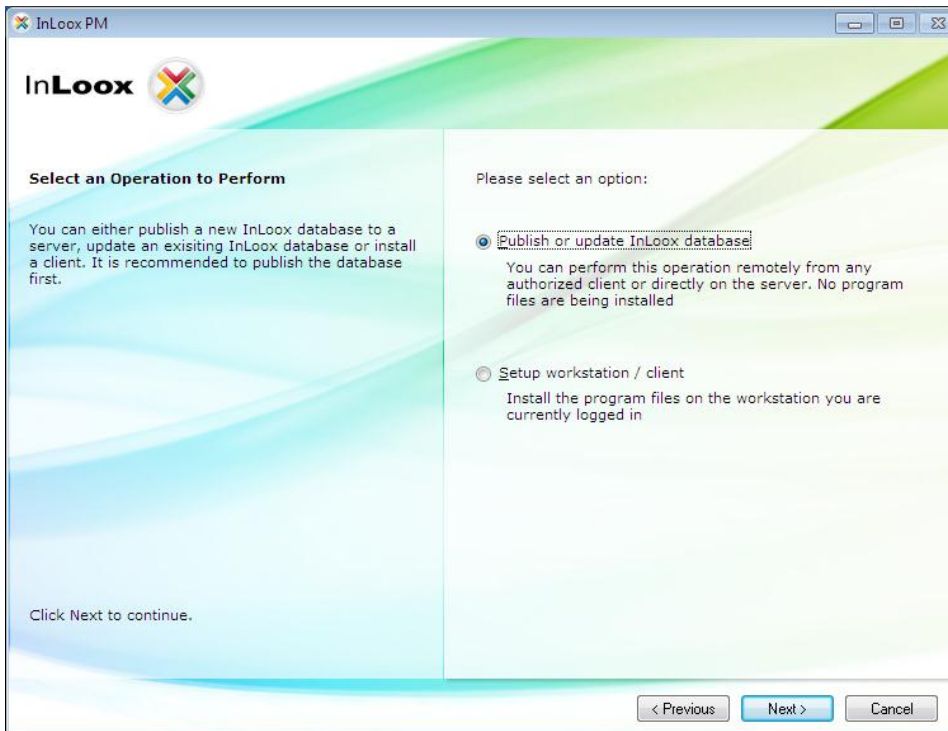
3. The installation assistant is started  
Select the desired installation language (e.g. "English")



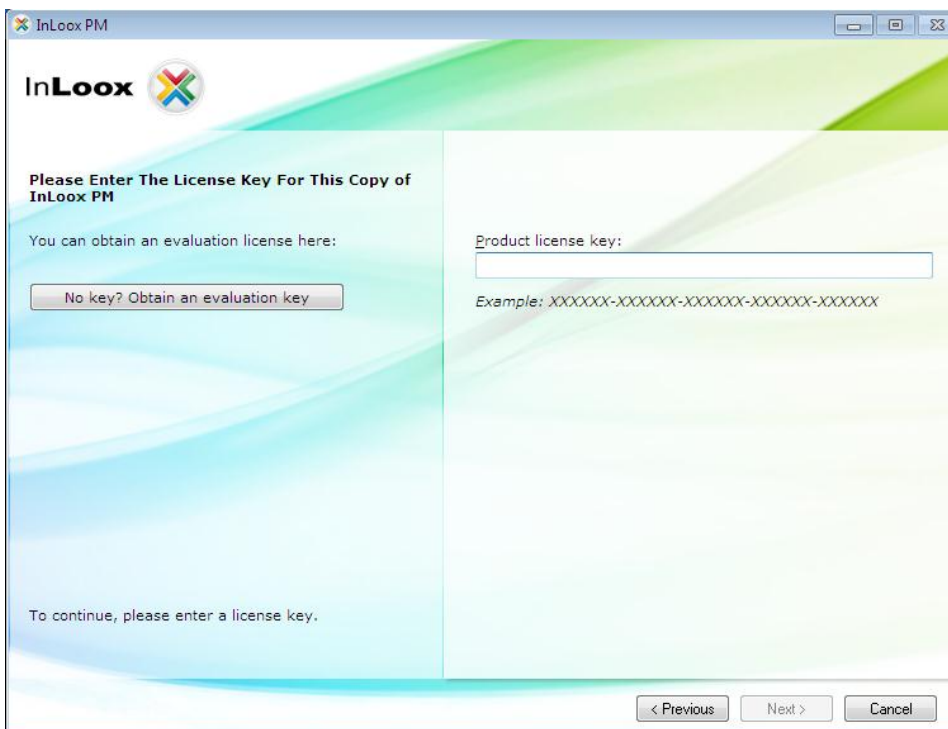
4. The system requirements are examined and if necessary components are installed. Click on "Next". The installation can take several minutes depending on extent.
5. Click on „Next“



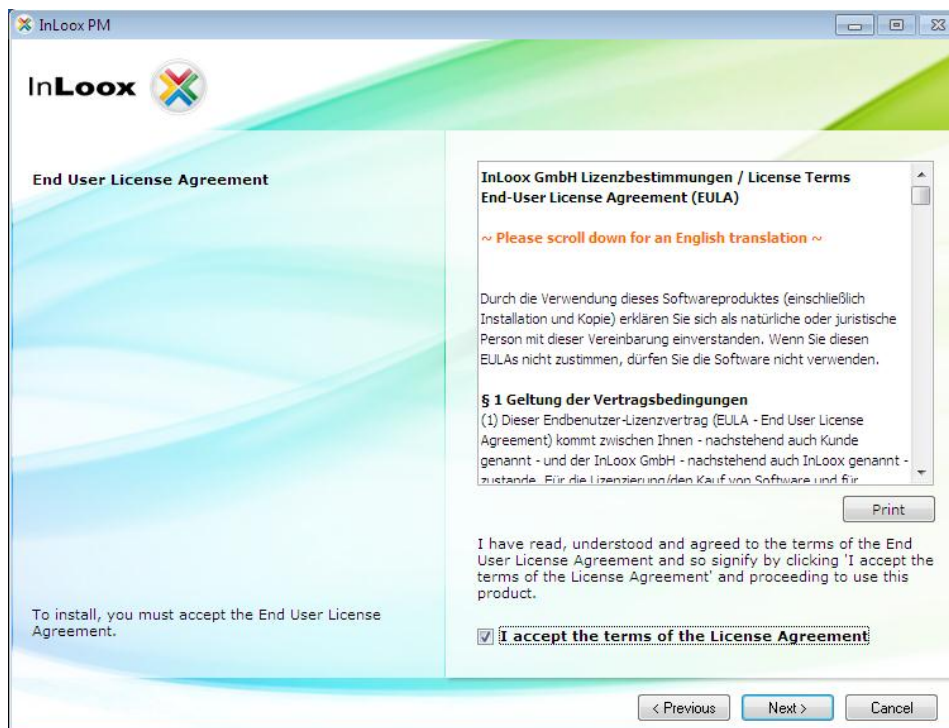
6. Select “Publish or update InLoox database” and click on “Next”



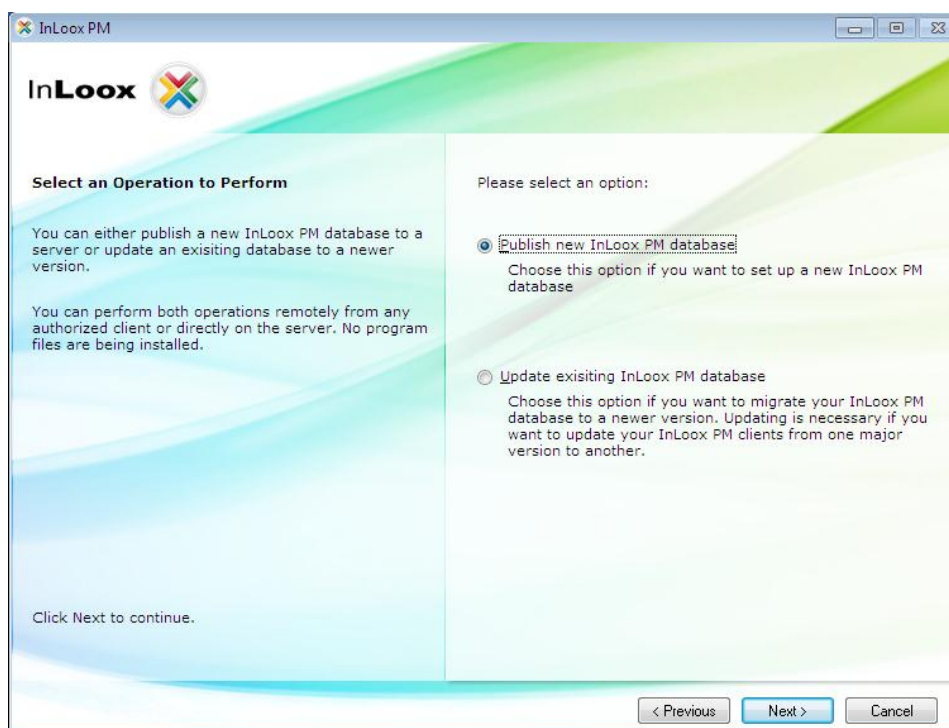
7. Enter your InLoox PM license key and click on “Next”



- Click on “I accept the terms of the License Agreement”, then on “Next”

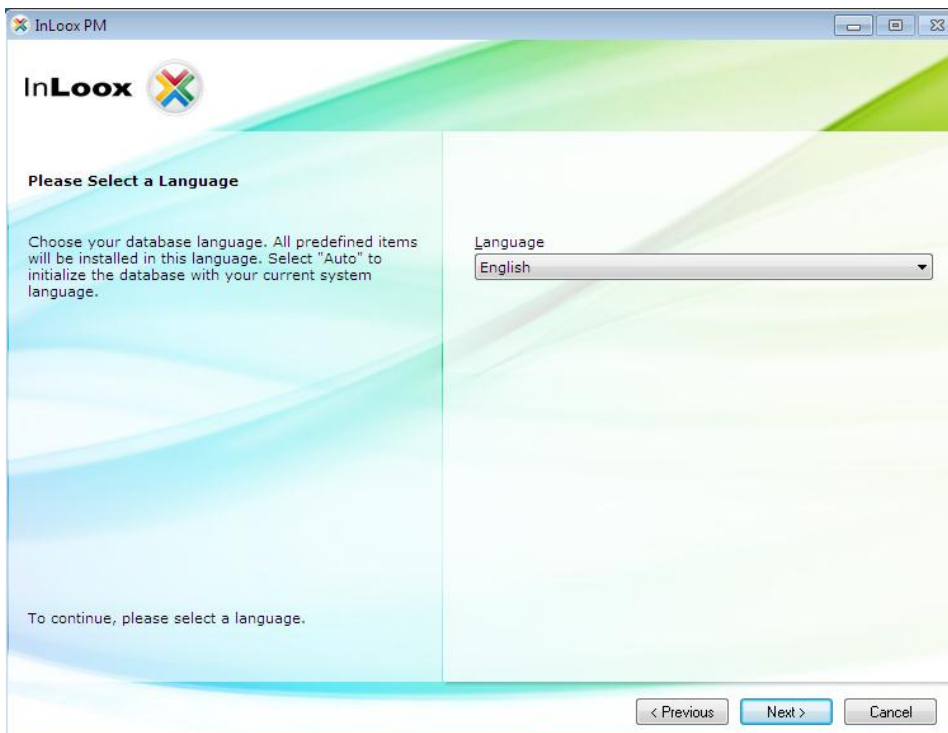


- Click on “Publish new InLoox database”



10. Select the language you want to use for your database.

Hint: This selection influences e.g. test in reports and notifications. The user interface is not affected from this selection and can be changed in InLoox PM at any time.



11. Select the database system which should be used, e.g. „Microsoft SQL server“

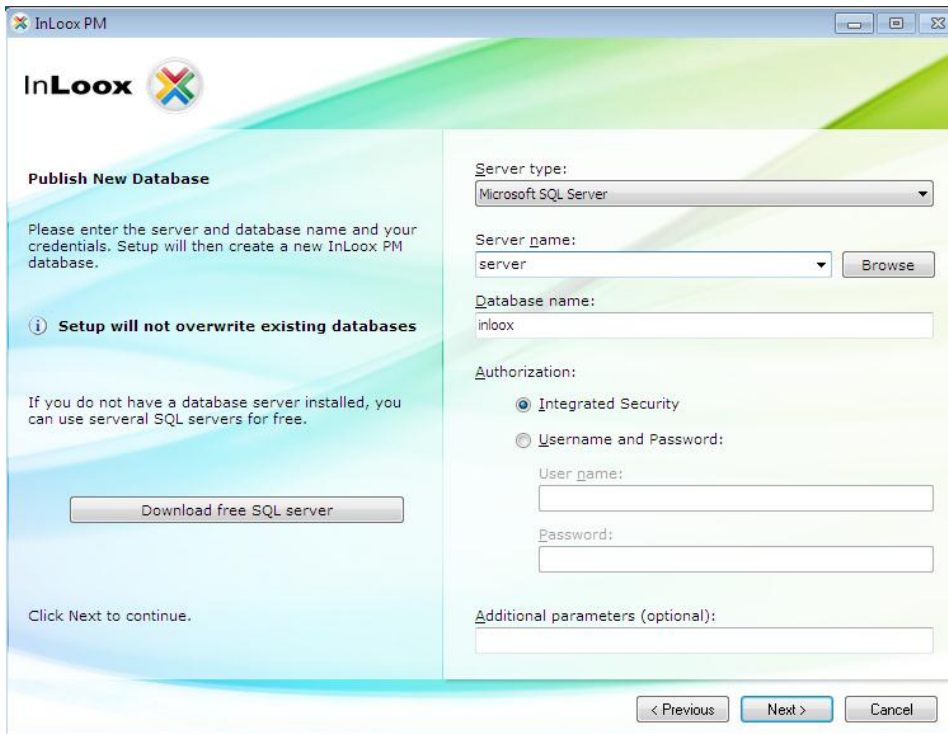
You can scan for available „Microsoft SQL Server“ on the network. Select a server from the list of available Microsoft SQL Servers. If you use another type of server, please fill in the server name manually.

The database name can be freely assigned, but special characters have to be avoided. Note that the database must not be present. The installation assistant creates a new database.

The authorization mode „Integrated Security“ is applicable for „Microsoft SQL Server“. Other database manufacturers only offer authorization with user name and password as default. In each case you need the authorization to publish a new database. If an appropriate authorization is not present, the installation cannot be continued. Please check the chapter „Troubleshooting“, if problems occur.

Additional parameters are needed, in order to set different port numbers or timeout settings. A different setting is normally not necessary.

Click on “Next” after setting the values.



Important! When using “*Integrated Security*” you have to set the permissions for all users who will use InLoox PM.

Please consult the whitepaper “*InLoox PM 7.x configuration guide for Microsoft SQL Server*” for detailed information.

### Examples for the server name:

Microsoft SQL Server:

The server name e.g. for a Microsoft SQL Express installation would be “<server>\SQLEXPRESS” – SQLEXPRESS is the default instance name for this installation.

On a full version of Microsoft SQL Server it would be “<server>” since the default instance name is empty.

(Replace “<server>” by the name or IP of the hosting server)

MySQL:

On MySQL you just specify the name or IP of the hosting server. (“<server>”)

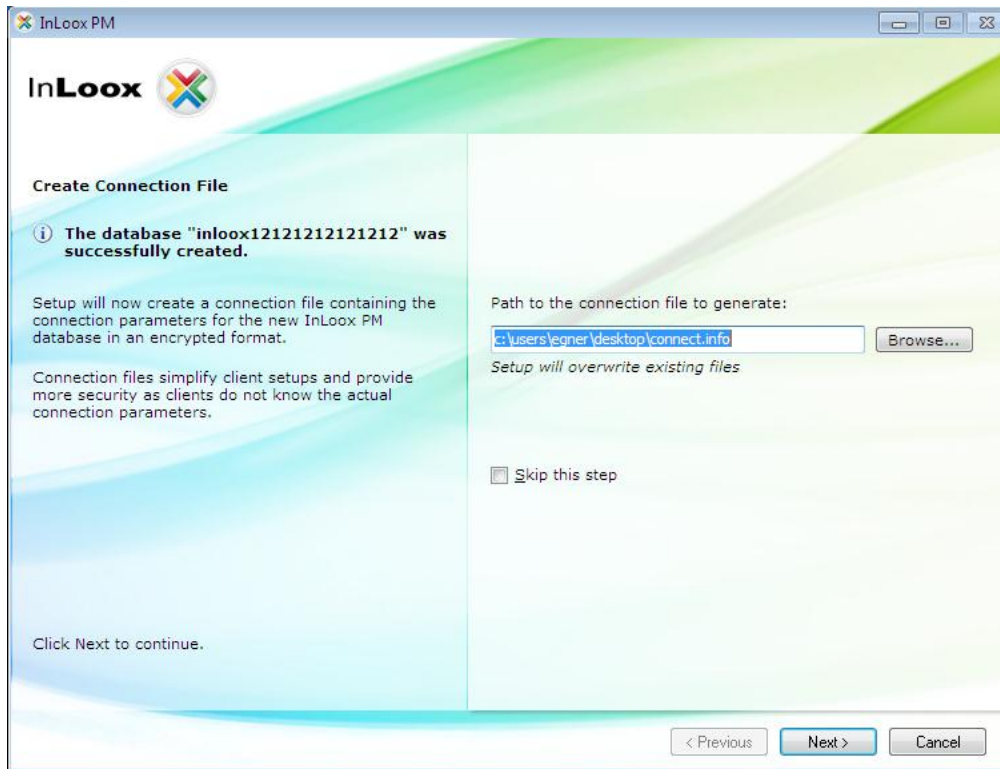
Oracle:

For Oracle specify the name of the hosting server.

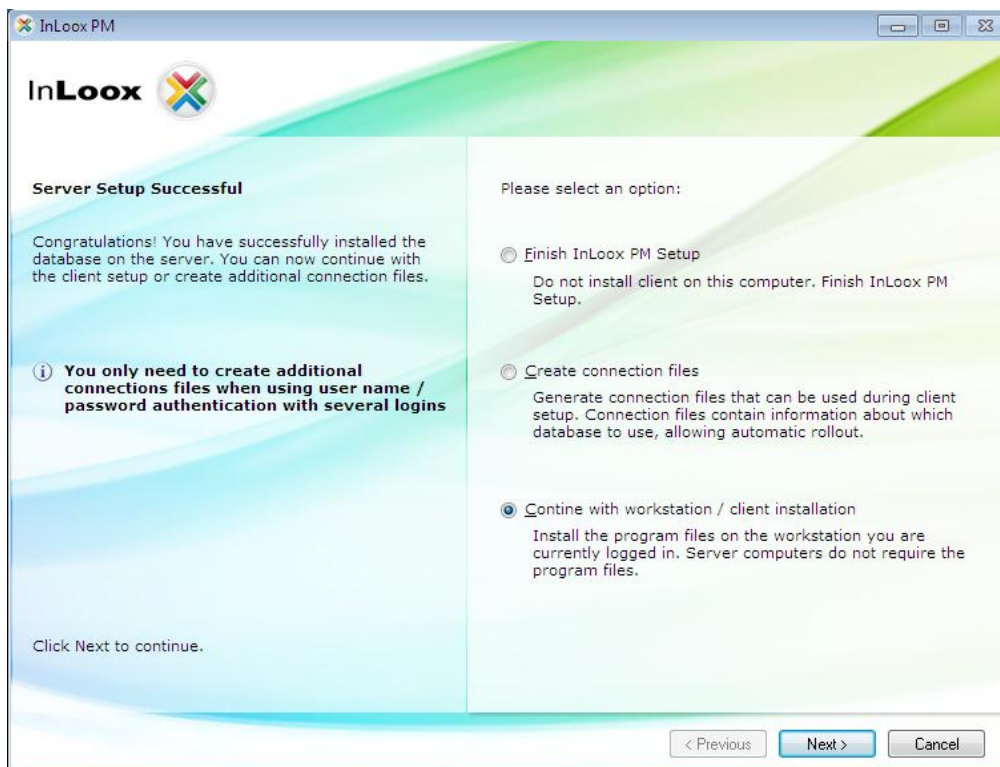
Important! Fill in the oracle instance name (SID) for “*Database name*”.

The default name is “*orcl*” for an Oracle Enterprise server – for Oracle Express it is “*xe*”.

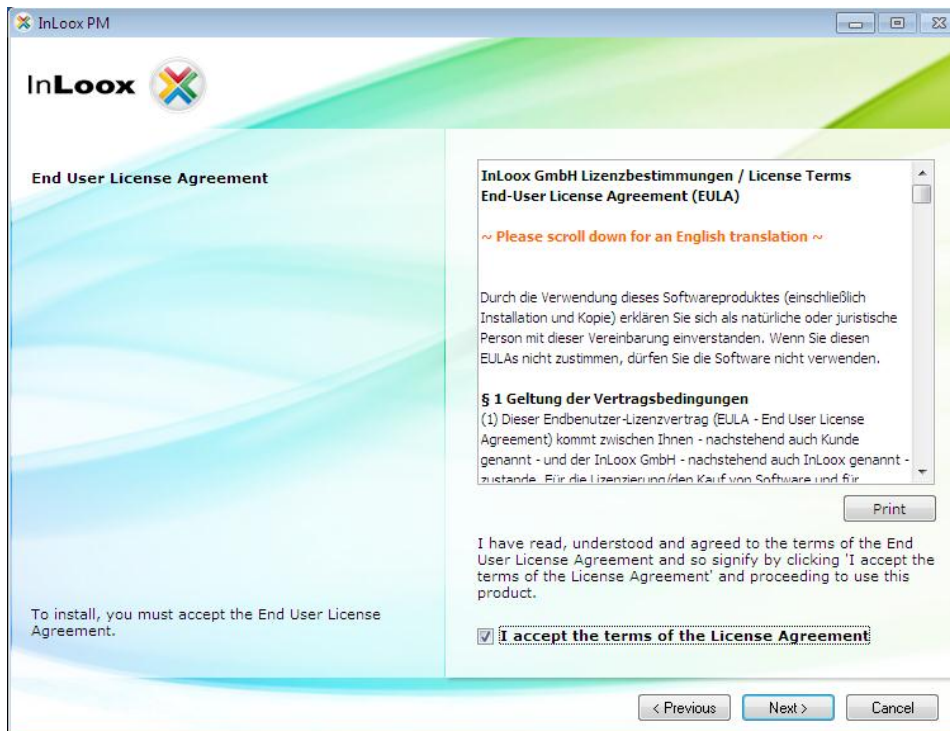
12. Select the path for the connection file and click on “Next”



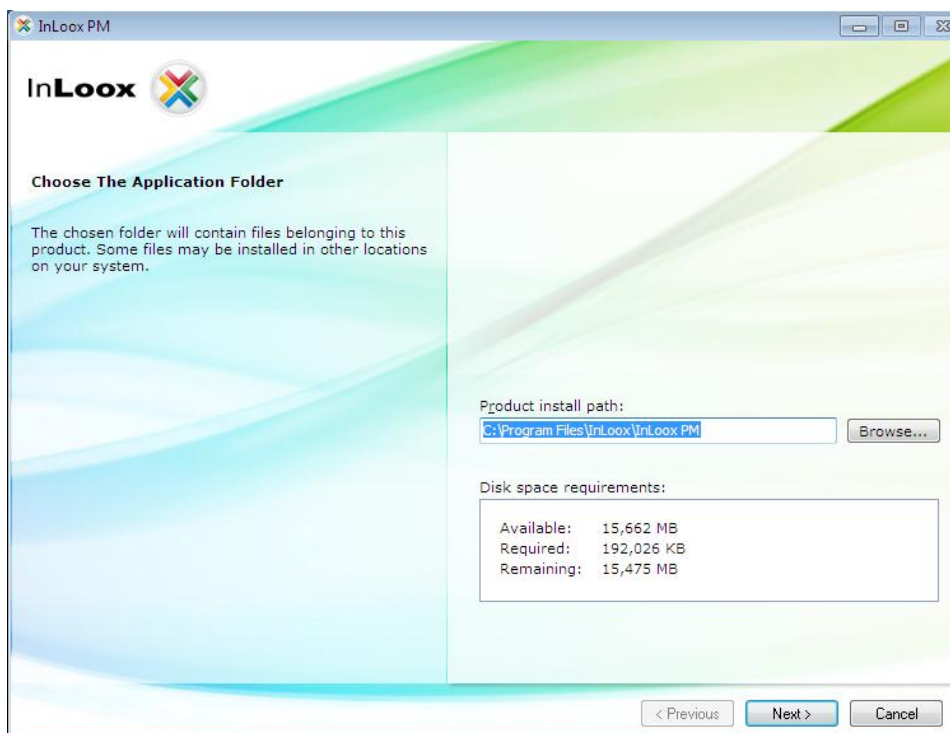
13. Select “Continue with workstation / client installation” and click on “Next”



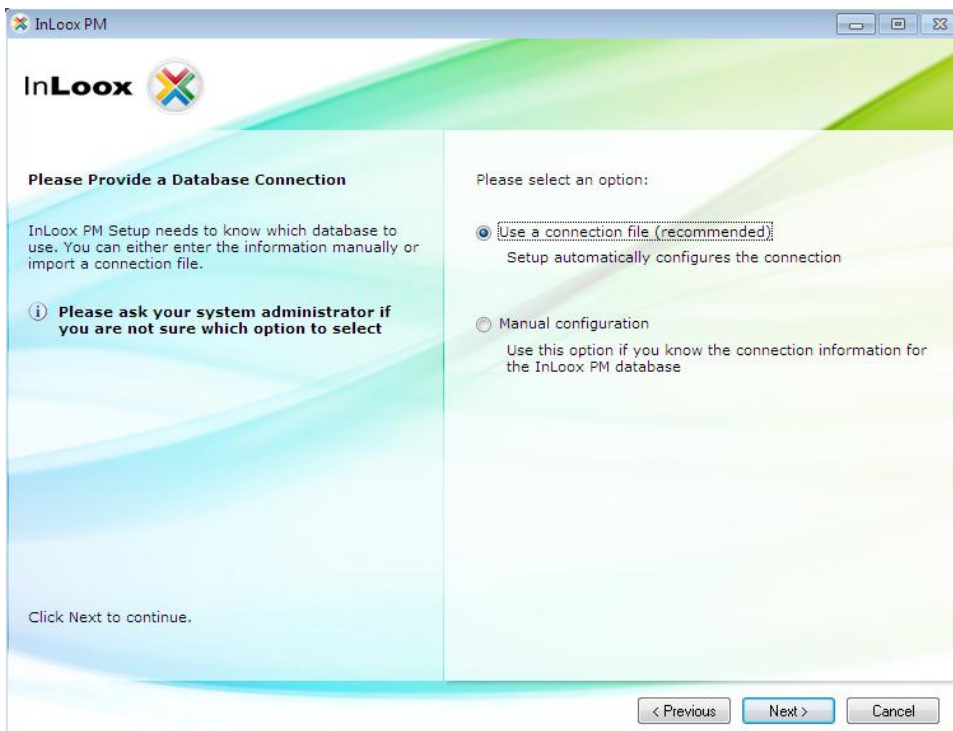
14. Click on “I accept the terms of the License Agreement”, then on “Next”



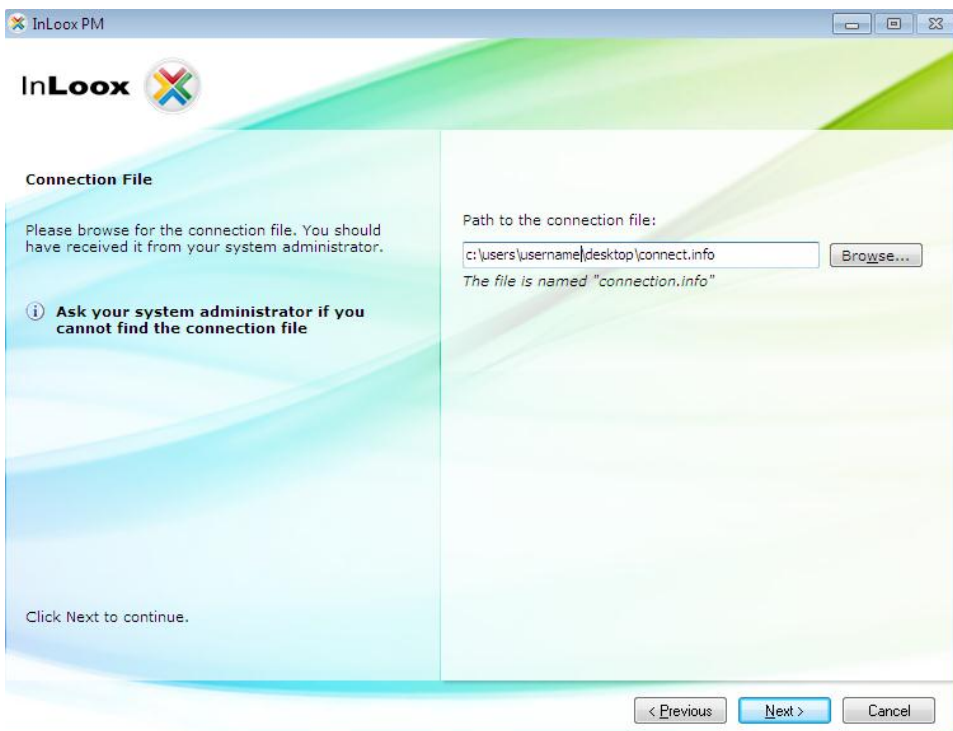
15. If desired change the standard path and click on “Next”



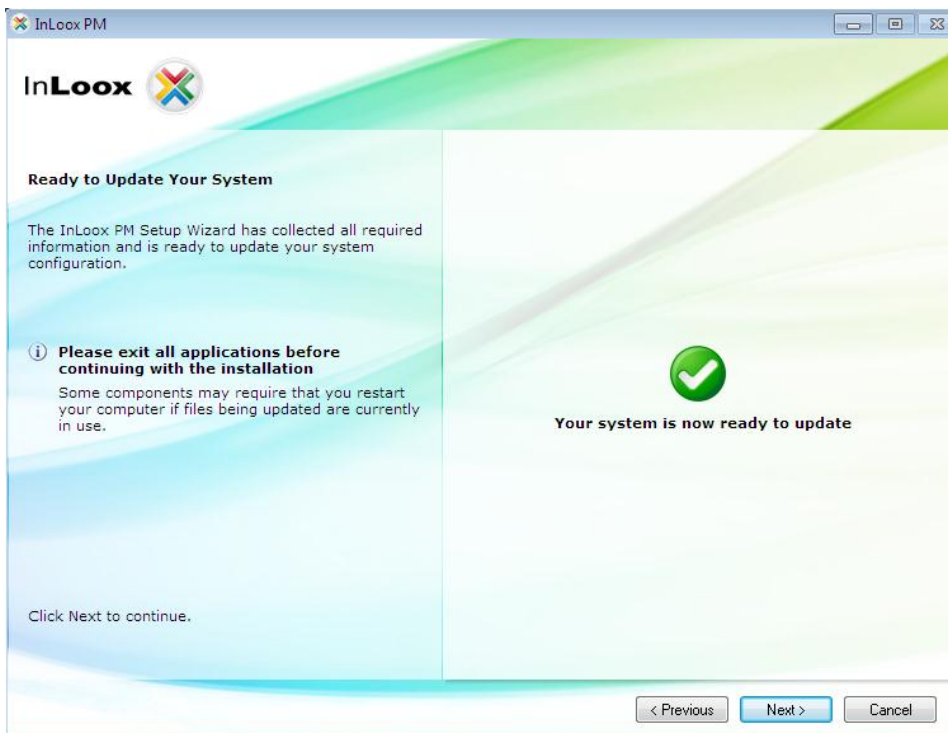
16. Select “Use a connection file (recommended)” and click on “Next”



17. Select the path to *connect.info* file if necessary and click on “Next”



18. Click on „Next“



19. Click on „Finish“



## Troubleshooting

### General errors

If you cannot create a connection to a SQL Server during installation please verify that a SQL Server is installed. Ask your system administrator. If you have access to your server, proceed as follows:

1. Open: **Start >> Control Panel >> Programs and Features** on the server
2. There has to be a SQL server entry in the list of the installed software. See chapter „General Information“ for a list of supported servers.
3. Open: **Start >> All programs >> Administration >> Services** on the server
4. There has to be a SQL server entry in the service list. The service must be *started*.

Ensure that the port of the database servers is not *blocked*. Examine the firewall settings on the server, the clients as well as on the network hardware. The standard ports of the databases are:

- MS SQL Server: Port 1433
- Oracle Application Server/Oracle Database: Port 1521
- MySQL Server: Port 3306

### Errors related to Microsoft SQL server

Register the appropriate users into the Active directory user group for SQL users.

1. Open: **Start >> All Programs >> Administration >> Active directory user and - computers** on the server
2. Edit the appropriate user (e.g. „John Doe“) or the appropriate user group (e.g. „Coworker selling “)
3. The dialog „*Properties of...* “ appears. Change to tab „*member of* “
4. Click on **Add..** The dialog „*Select Group*“ appears
5. Enter into **object names** the input field

**SQLServer2005MSSQLUser** (for SQL server 2005) and/or **SQLServer2008MSSQLUser** (for SQL server 2008). Click on **Check name**. The name should be resolved as follows:

SQLServer2005MSSQLUser\$SERVERNAME\$MSSQLSERVER (for SQL server 2005)

SQLServer2008MSSQLUser\$SERVERNAME\$MSSQLSERVER (for SQL server 2008)

The part **SERVERNAME** is in this context the name of the SQL server and/or the primary domain controller (PDC).

6. Click on „OK“ in the opened dialog

You can also configure the access permissions via the SQL Server Management Studio for SQL 2005, 2008 and 2008 R2. InLoox supports Windows- and SQL-account logon. Please consider the appropriate guide for configuring the authorizations by Microsoft:

<http://support.microsoft.com/?scid=kb%3Ben-us%3B889615&x=5&y=9>