



InLoox

InLoox 9 for Outlook Product Presentation

The Project Management
Software for Microsoft
Outlook



Content

- Project management in Outlook
- A project in detail
- Checklists
- Task management
- Project time tracking and documentation
- Budgets and reports

Project management software for Outlook

InLoox for Outlook is...

- ...directly integrated in Microsoft Outlook
- ...reliable and customizable
- ...the solution for professional project management

easy-to-use

+ 50,000 users

= a solution that works

InLoox for Outlook includes...



Project planning



Task management



Budgets



Time tracking



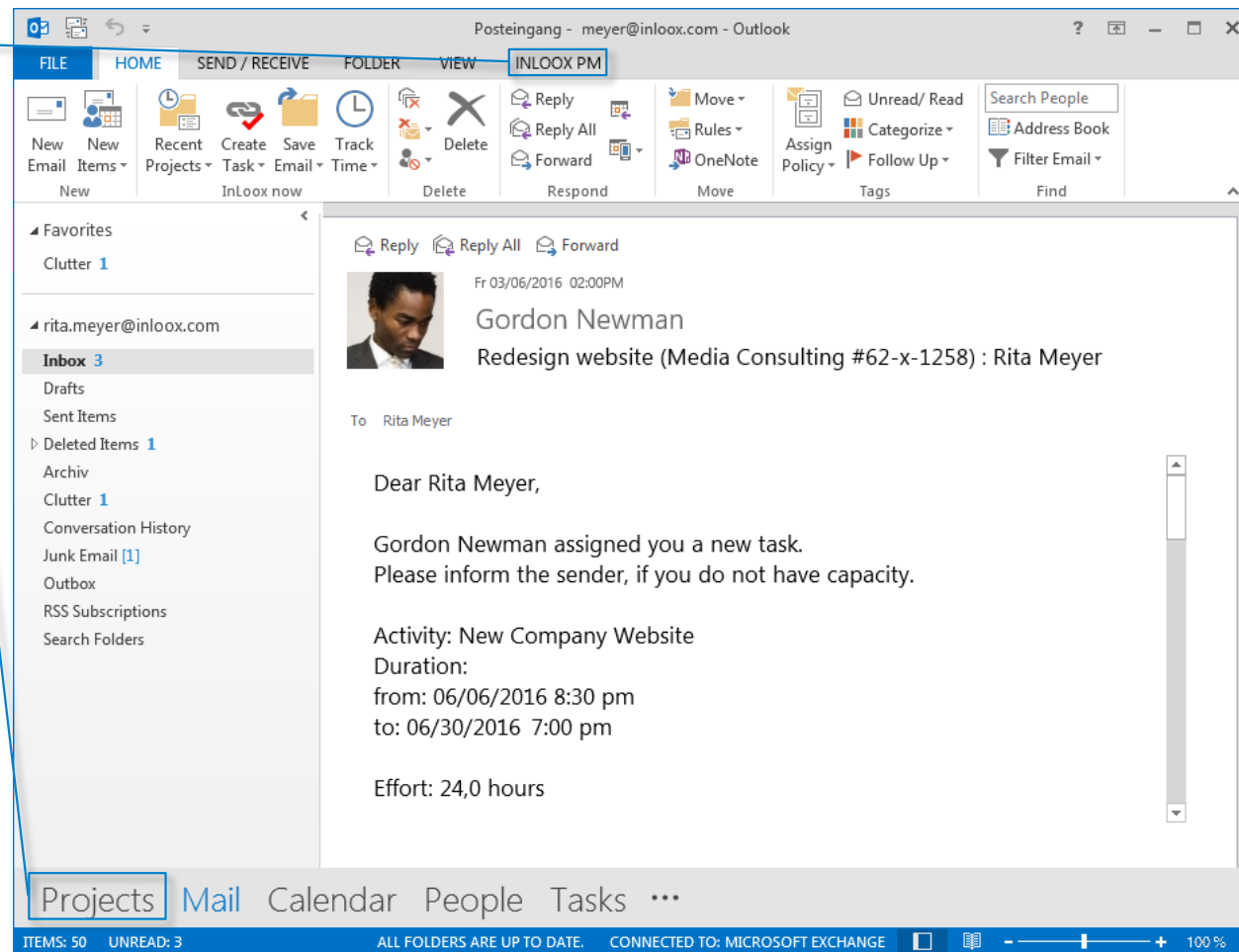
Document management

InLoox erweitert Microsoft Outlook

InLoox is directly accessible in Microsoft Outlook with just one click.

Create **visual project dashboards** comprised of various diagram options and data sources.

The **project list** gives you an overview of all projects in InLoox. Use custom rules to highlight certain projects.



A project in detail

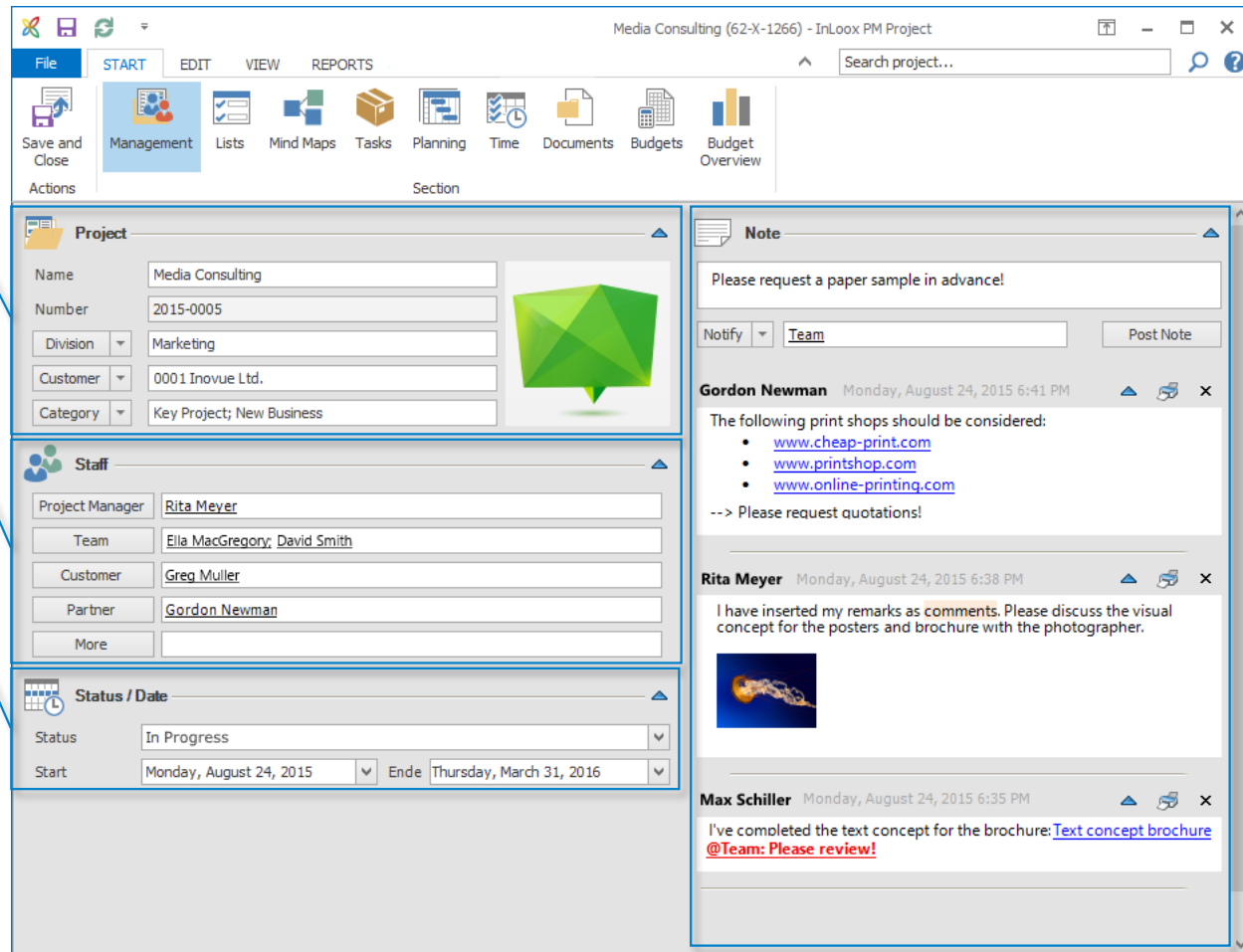
Clearly structure your project information with InLoox for Outlook.

InLoox uses your Outlook contacts as resources for projects. **Project responsibilities** are clearly defined.

Use **custom fields** to enhance your InLoox as you need it.

Use **project notes** to communicate with your project team. You can format the comments as needed.

Team members can file **project requests** and management can approve or reject them.



The screenshot displays the InLoox PM Project interface within an Outlook window. The title bar reads 'Media Consulting (62-X-1266) - InLoox PM Project'. The ribbon includes 'File', 'START', 'EDIT', 'VIEW', and 'REPORTS'. The 'START' ribbon has sections for 'Actions' (Save and Close) and 'Section' (Management, Lists, Mind Maps, Tasks, Planning, Time, Documents, Budgets, Budget Overview). The main area shows a project card for 'Media Consulting' with the following details:

- Name: Media Consulting
- Number: 2015-0005
- Division: Marketing
- Customer: 0001 Inovue Ltd.
- Category: Key Project; New Business

Below the project card is the 'Staff' section:

- Project Manager: Rita Meyer
- Team: Ella MacGregory; David Smith
- Customer: Greg Muller
- Partner: Gordon Newman

The 'Status / Date' section shows:

- Status: In Progress
- Start: Monday, August 24, 2015
- Ende: Thursday, March 31, 2016

The 'Note' pane on the right contains three messages:

- Team** (Monday, August 24, 2015 6:41 PM): Please request a paper sample in advance!
- Gordon Newman** (Monday, August 24, 2015 6:41 PM): The following print shops should be considered:
 - www.cheap-print.com
 - www.printshop.com
 - www.online-printing.com
 --> Please request quotations!
- Rita Meyer** (Monday, August 24, 2015 6:38 PM): I have inserted my remarks as comments. Please discuss the visual concept for the posters and brochure with the photographer. (Includes an image of a glowing orange structure)
- Max Schiller** (Monday, August 24, 2015 6:35 PM): I've completed the text concept for the brochure: [Text concept brochure](#) @Team: Please review!

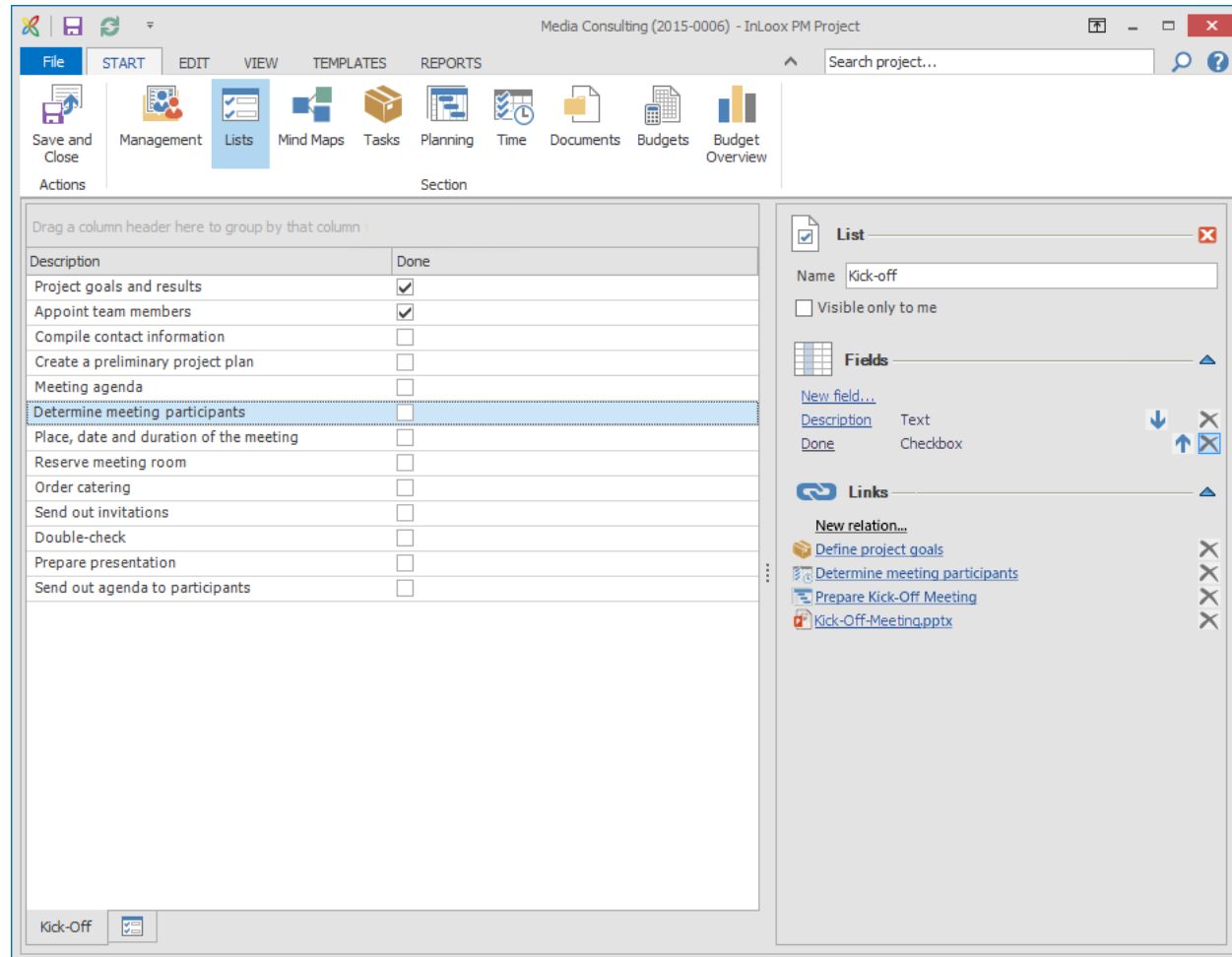
Lists

Lists

Create **checklists** for your projects and view them in the **list or card view**.

Customize your lists according to your own needs.

Link lists to **project elements** such as tasks or documents.



Media Consulting (2015-0006) - InLoox PM Project

File | START | EDIT | VIEW | TEMPLATES | REPORTS

Save and Close | Management | **Lists** | Mind Maps | Tasks | Planning | Time | Documents | Budgets | Budget Overview

Actions | Section

Drag a column header here to group by that column

Description	Done
Project goals and results	<input checked="" type="checkbox"/>
Appoint team members	<input checked="" type="checkbox"/>
Compile contact information	<input type="checkbox"/>
Create a preliminary project plan	<input type="checkbox"/>
Meeting agenda	<input type="checkbox"/>
Determine meeting participants	<input type="checkbox"/>
Place, date and duration of the meeting	<input type="checkbox"/>
Reserve meeting room	<input type="checkbox"/>
Order catering	<input type="checkbox"/>
Send out invitations	<input type="checkbox"/>
Double-check	<input type="checkbox"/>
Prepare presentation	<input type="checkbox"/>
Send out agenda to participants	<input type="checkbox"/>

Kick-Off

List

Name: Kick-off

Visible only to me

Fields

New field...

Description: Text

Done: Checkbox

Links

New relation...

- Define project goals
- Determine meeting participants
- Prepare Kick-Off Meeting
- Kick-Off-Meeting.pptx

Collect, structure and brainstorm ideas

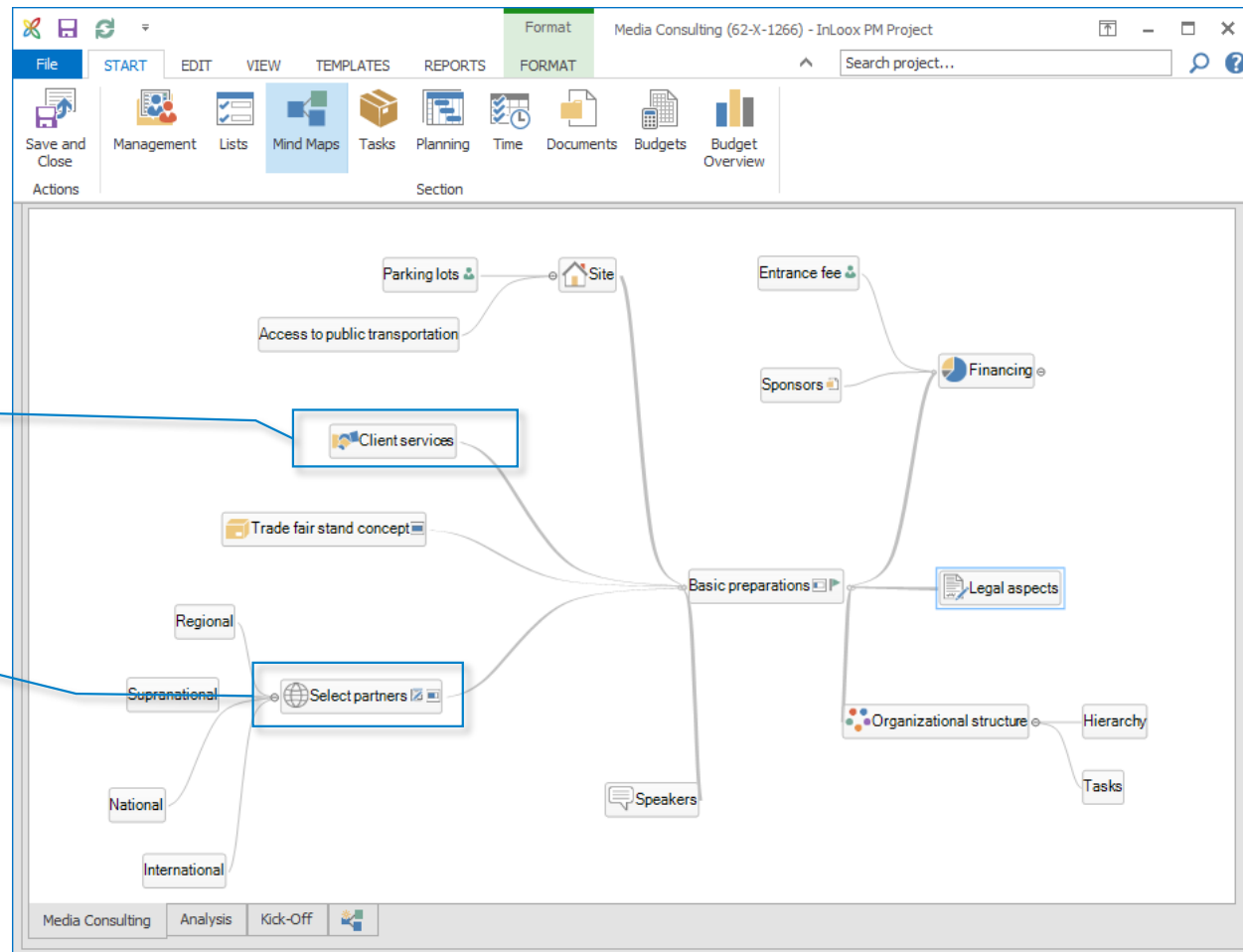
Mind maps

Collect and organize your ideas and project information directly in InLoox for Outlook.

Use **icons** to visualize ideas and attach project documents directly to your mind map nodes.

Define the **progress** of each node and **assign resources** to a node.

Copy mind maps into your **project plan** and turn your mind map nodes into **tasks**.



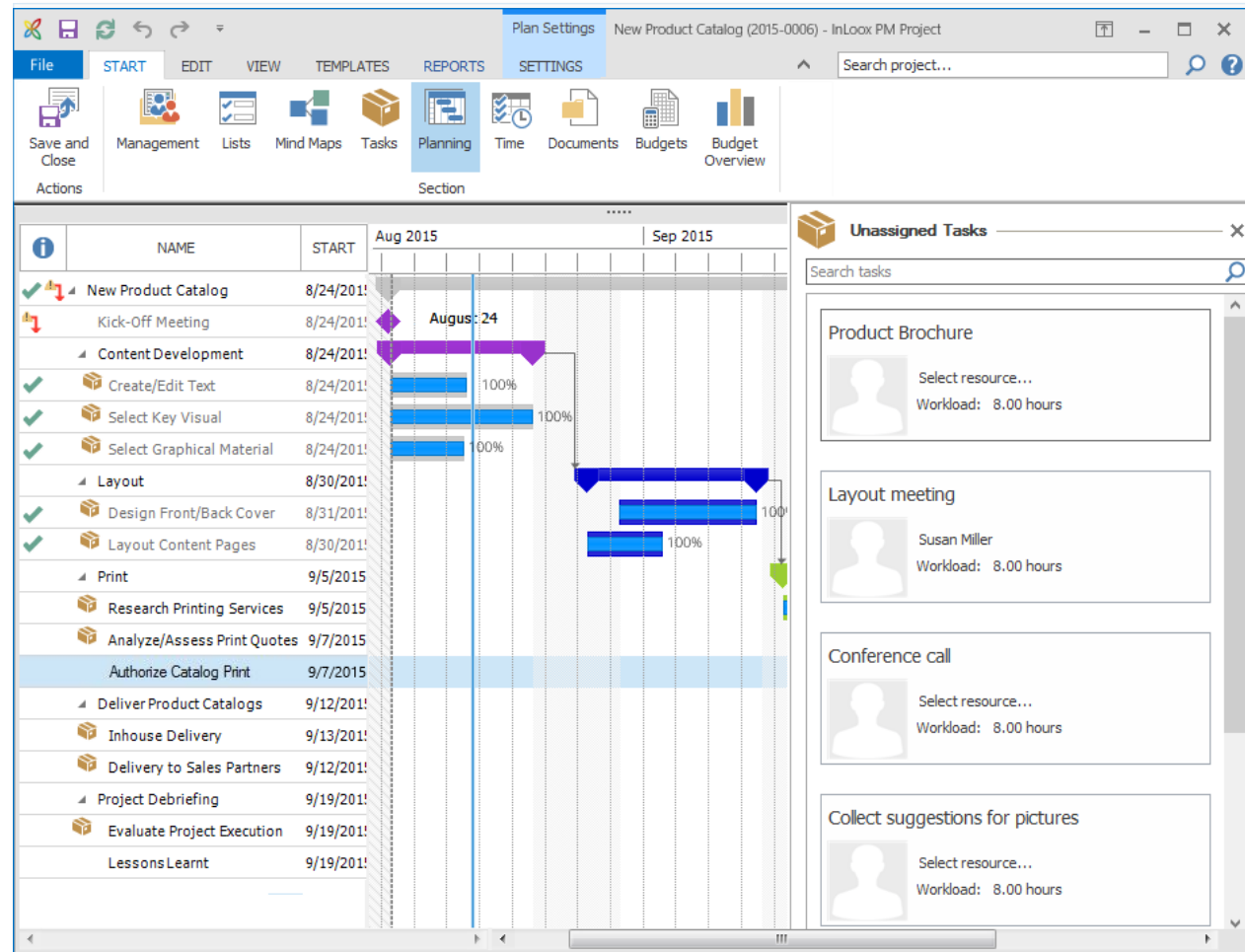
Task management

Tasks

Create, assign and organize your tasks in a virtual Kanban board – independently from your project schedule.

Leave a comment on a task and automatically notify team members about any changes.

Drag and drop tasks into your project plan to **assign them to an activity**. The **project's progress** will **update automatically** as soon as a task is marked as "Done".



The screenshot displays the InLoox PM Project software interface. The main window shows a Gantt chart for a project titled 'New Product Catalog (2015-0006) - InLoox PM Project'. The chart spans from August 2015 to September 2015. A task list on the left includes items like 'New Product Catalog', 'Kick-Off Meeting', 'Content Development', and 'Layout'. The 'Unassigned Tasks' panel on the right lists tasks such as 'Product Brochure', 'Layout meeting', 'Conference call', and 'Collect suggestions for pictures', each with a workload of 8.00 hours.

NAME	START	Progress
New Product Catalog	8/24/2015	100%
Kick-Off Meeting	8/24/2015	100%
Content Development	8/24/2015	100%
Create/Edit Text	8/24/2015	100%
Select Key Visual	8/24/2015	100%
Select Graphical Material	8/24/2015	100%
Layout	8/30/2015	100%
Design Front/Back Cover	8/31/2015	100%
Layout Content Pages	8/30/2015	100%
Print	9/5/2015	100%
Research Printing Services	9/5/2015	100%
Analyze/Assess Print Quotes	9/7/2015	100%
Authorize Catalog Print	9/7/2015	100%
Deliver Product Catalogs	9/12/2015	100%
Inhouse Delivery	9/13/2015	100%
Delivery to Sales Partners	9/12/2015	100%
Project Debriefing	9/19/2015	100%
Evaluate Project Execution	9/19/2015	100%
Lessons Learnt	9/19/2015	100%

Visualize staff workload

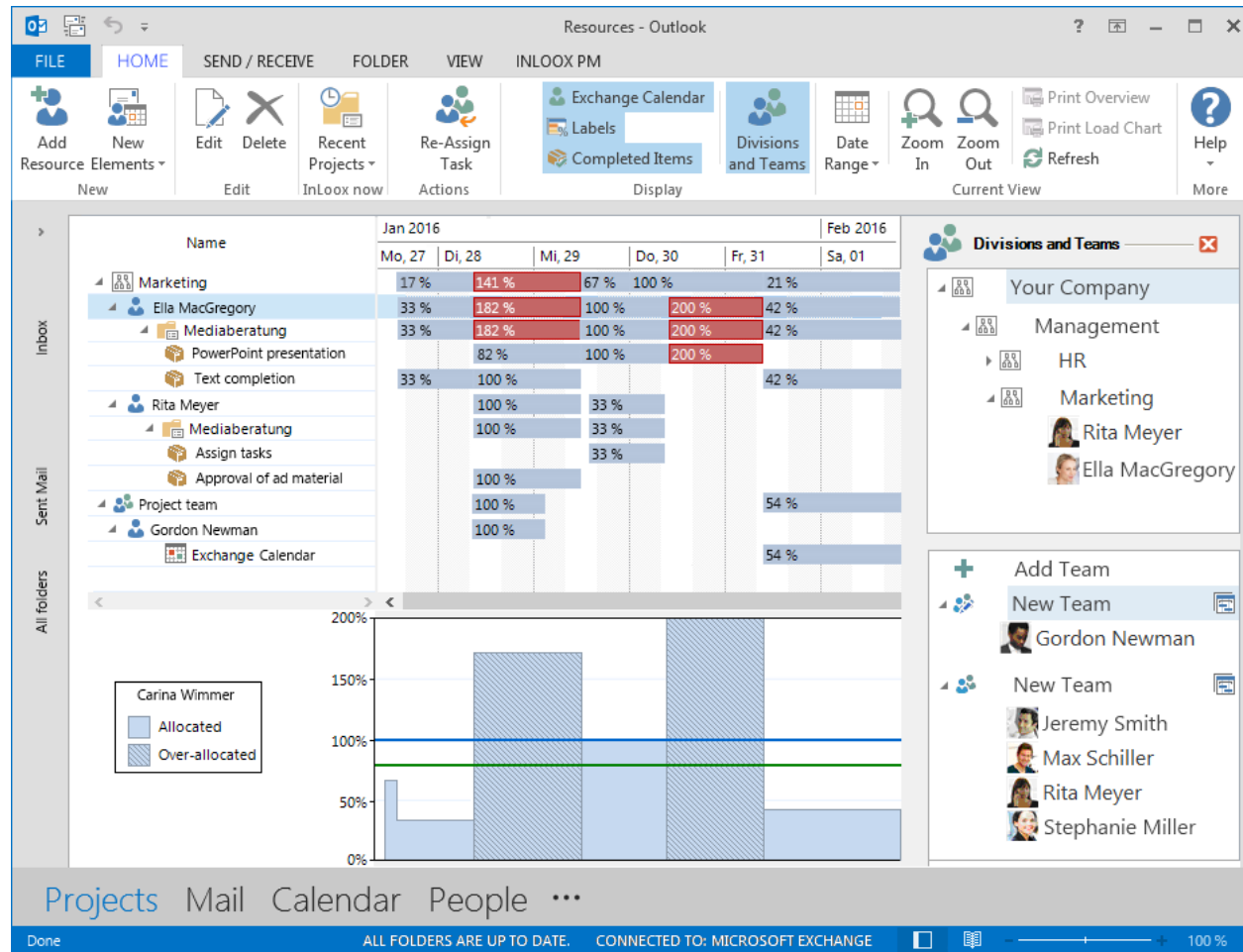
Resource & workload management

Keep an eye on your team's workload with InLoox for Outlook.

Get a comprehensive overview of your **team's workload** and the **utilization of equipment**.

InLoox for Outlook also takes information from your **Exchange calendar** into account.

Display the workload of specific **teams or departments**.



Keep your project schedule under control

Project scheduling

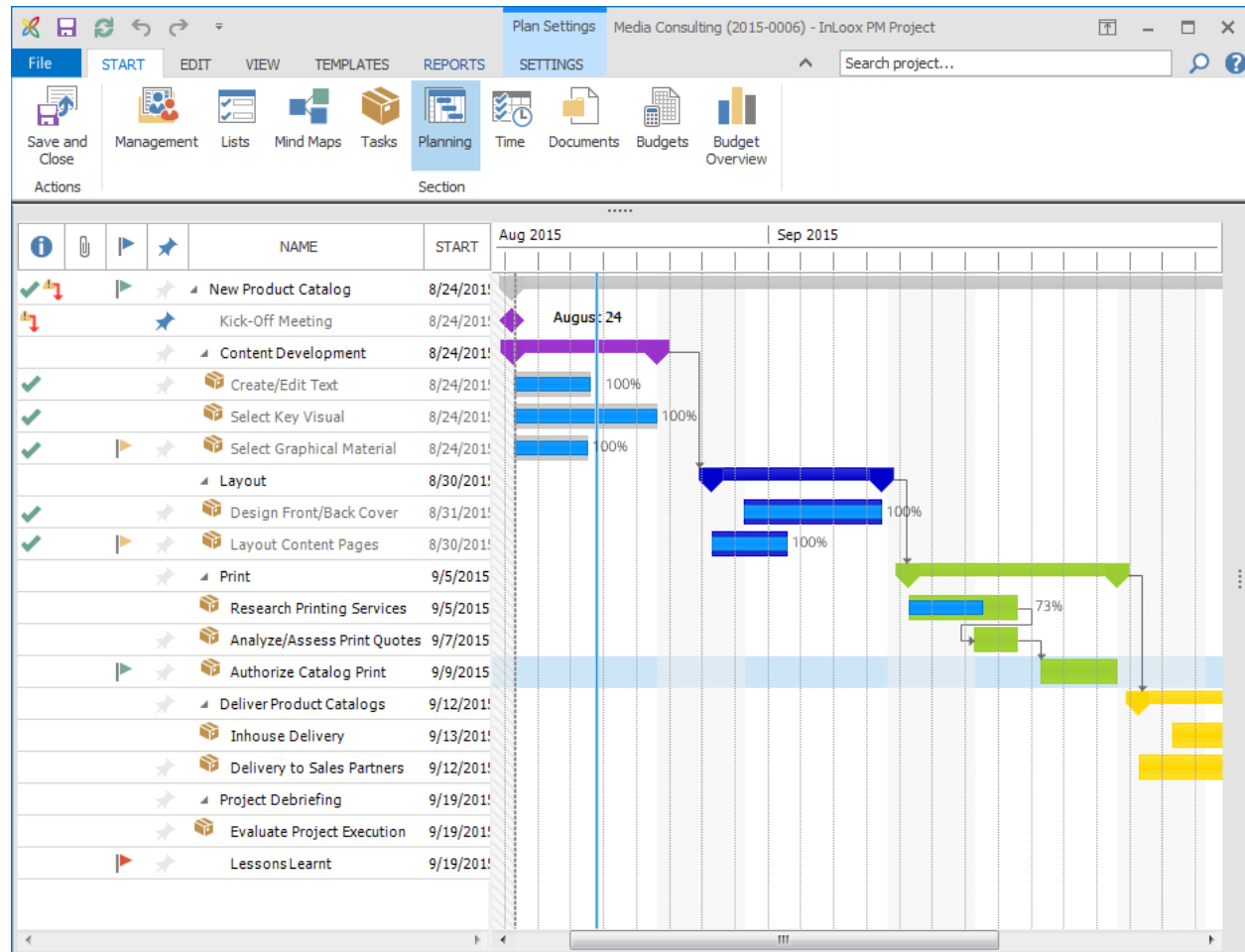
Plan simple or complex projects with InLoox for Outlook.

Critical path

Critical planning elements are highlighted in red.

Synchronization

Synchronize planning elements such as activities and milestones with Outlook Tasks or the Outlook Calendar.



Professional project planning

Efficient scheduling

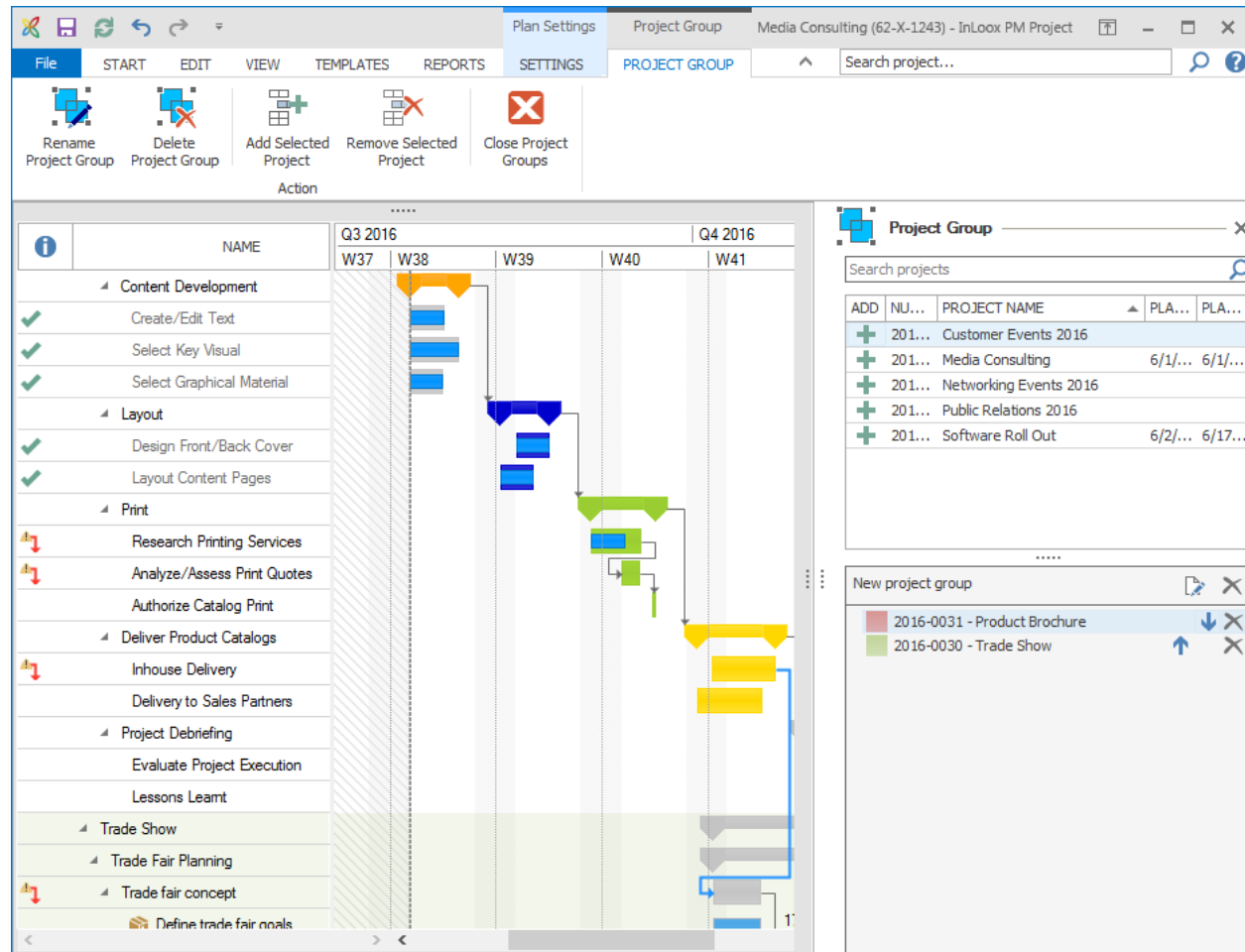
Display constraints, dependencies and the work calendar in InLoox for Outlook.

Project groups

Connect project plans of interdependent projects to get an overview of multiple projects at once.

Calendar view

The global calendar shows activities and milestones of each of your projects in one calendar view.



Rückmeldungen zum Projektfortschritt

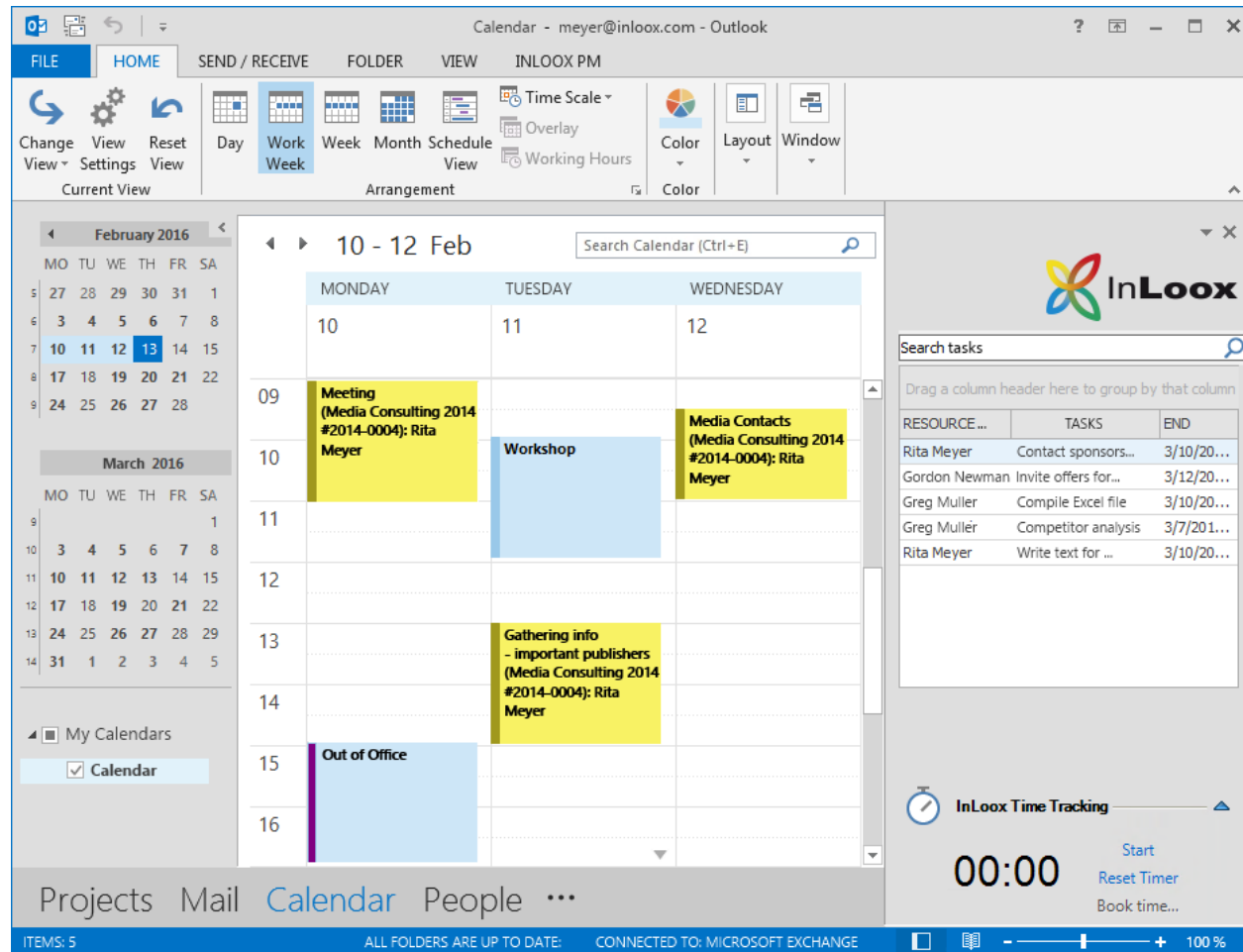
InLoox for Outlook notifies project team members of new or overdue tasks.

The Outlook calendar and InLoox project plan are always synchronized and up-to-date.

Your open tasks are always in sight in the tasks side panel.

Display task details with just one click.

Mark a completed task as "Done" and the project plan will update itself.



RESOURCE...	TASKS	END
Rita Meyer	Contact sponsors...	3/10/20...
Gordon Newman	Invite offers for...	3/12/20...
Greg Muller	Compile Excel file	3/10/20...
Greg Müller	Competitor analysis	3/7/201...
Rita Meyer	Write text for ...	3/10/20...

Project time tracking

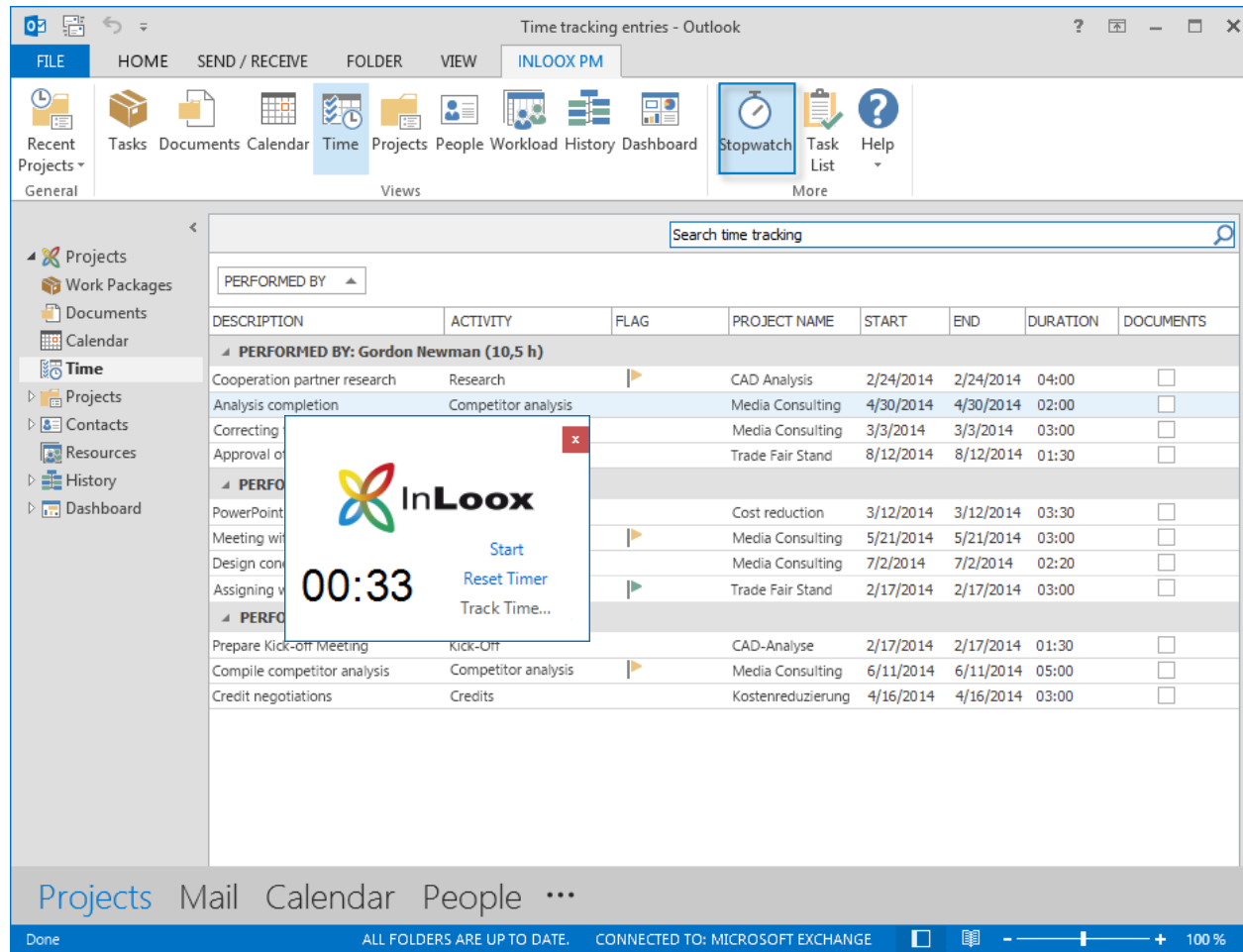
Time tracking

InLoox for Outlook makes it easy to track time and record the effort needed to complete tasks.

InLoox for Outlook can also take Outlook data (e.g. the sent date of emails) into account to create time tracking entries.

Time tracking with the stopwatch

Time how long you need to complete a task and assign it directly to a specific project.



The screenshot shows the Outlook interface with the 'INLOOX PM' ribbon active. The ribbon includes buttons for 'Stopwatch', 'Task List', and 'Help'. A search bar at the top of the main pane is labeled 'Search time tracking'. Below it, a table displays time tracking entries. A pop-up window is overlaid on the table, showing the InLoox logo and a stopwatch timer at 00:33, with buttons for 'Start', 'Reset Timer', and 'Track Time...'. The table has columns for DESCRIPTION, ACTIVITY, FLAG, PROJECT NAME, START, END, DURATION, and DOCUMENTS. A summary row indicates 'PERFORMED BY: Gordon Newman (10,5 h)'. The table lists various tasks such as 'Cooperation partner research', 'Analysis completion', 'Correcting', 'Approval of', 'PowerPoint', 'Meeting with', 'Design con', 'Assigning v', 'Prepare Kick-off Meeting', 'Compile competitor analysis', and 'Credit negotiations', each with associated dates and durations.

DESCRIPTION	ACTIVITY	FLAG	PROJECT NAME	START	END	DURATION	DOCUMENTS
PERFORMED BY: Gordon Newman (10,5 h)							
Cooperation partner research	Research		CAD Analysis	2/24/2014	2/24/2014	04:00	<input type="checkbox"/>
Analysis completion	Competitor analysis		Media Consulting	4/30/2014	4/30/2014	02:00	<input type="checkbox"/>
Correcting			Media Consulting	3/3/2014	3/3/2014	03:00	<input type="checkbox"/>
Approval of			Trade Fair Stand	8/12/2014	8/12/2014	01:30	<input type="checkbox"/>
PERFO							
PowerPoint			Cost reduction	3/12/2014	3/12/2014	03:30	<input type="checkbox"/>
Meeting with			Media Consulting	5/21/2014	5/21/2014	03:00	<input type="checkbox"/>
Design con			Media Consulting	7/2/2014	7/2/2014	02:20	<input type="checkbox"/>
Assigning v			Trade Fair Stand	2/17/2014	2/17/2014	03:00	<input type="checkbox"/>
PERFO							
Prepare Kick-off Meeting	KICK-OFF		CAD-Analyse	2/17/2014	2/17/2014	01:30	<input type="checkbox"/>
Compile competitor analysis	Competitor analysis		Media Consulting	6/11/2014	6/11/2014	05:00	<input type="checkbox"/>
Credit negotiations	Credits		Kostenreduzierung	4/16/2014	4/16/2014	03:00	<input type="checkbox"/>

Smart document management

Consistent structure

Organize project documents according to your own filing structure.

InLoox for Outlook supports:

- Local drives
- Networks
- Internet links
- Microsoft SharePoint sites

Document preview

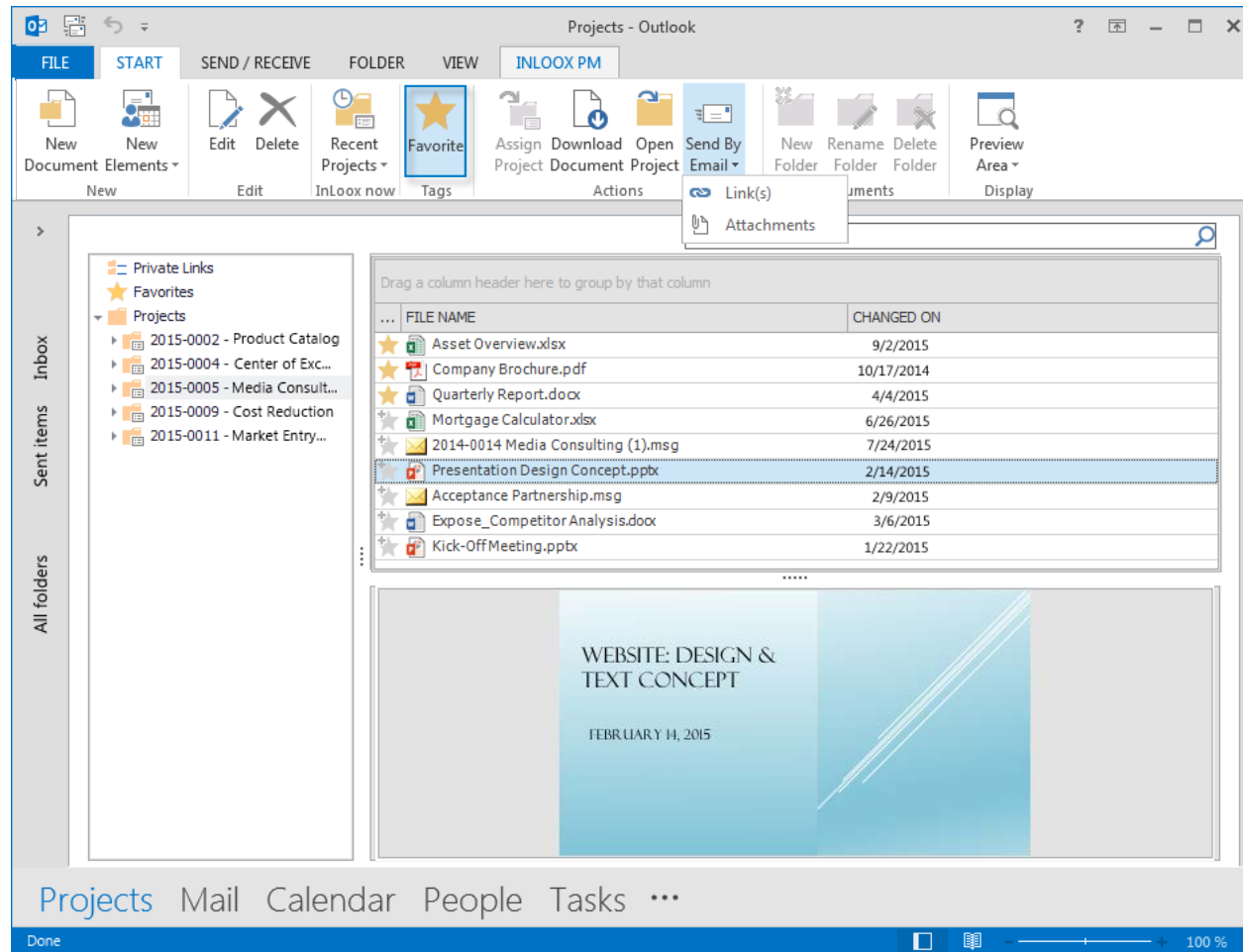
Preview your documents directly in InLoox for Outlook.

Send as email

Send project documents via email directly in InLoox.

Favorites

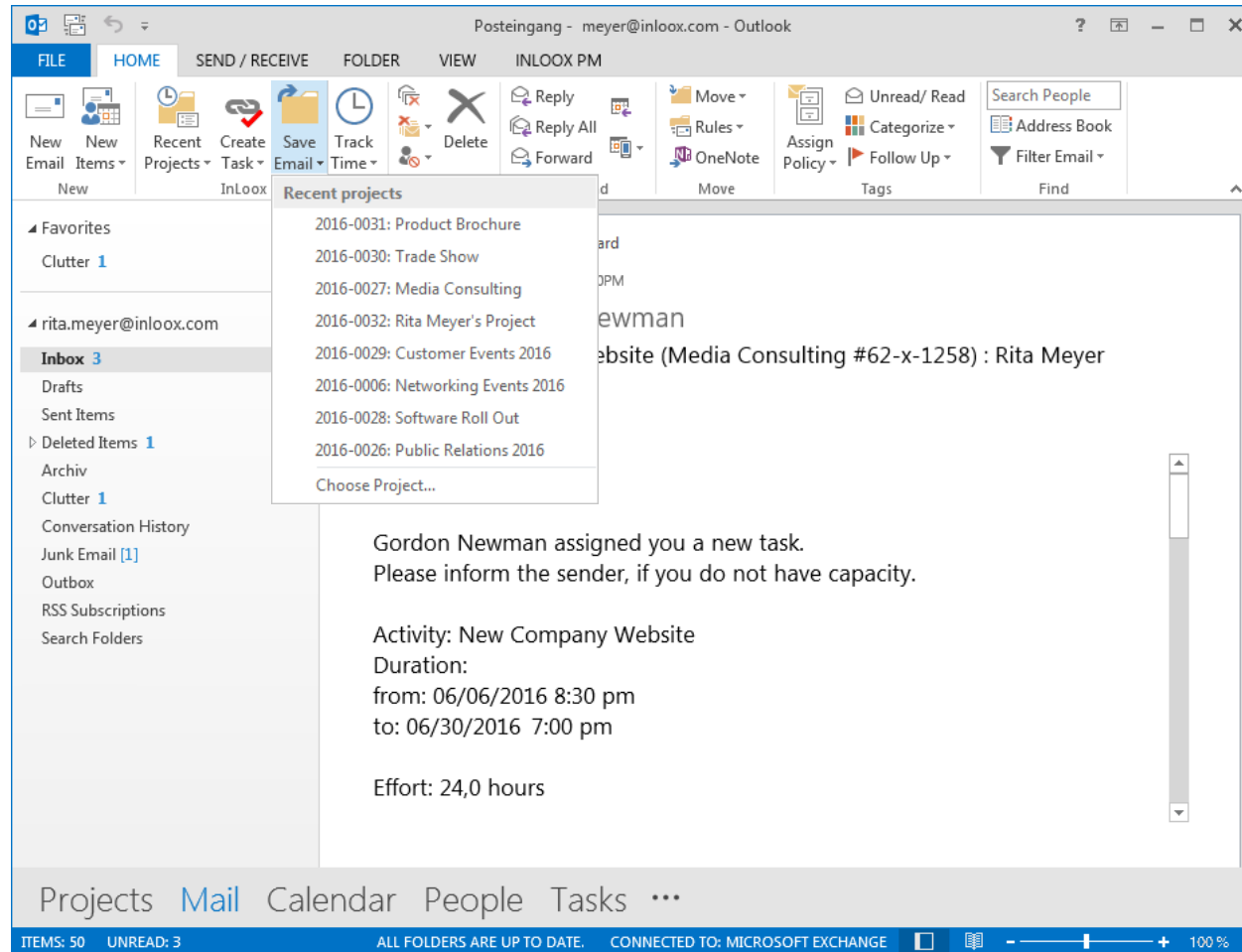
Favorite important documents to find them more quickly.



Attach emails with just one click

Assign emails, including attachments, directly to a project

InLoox is always accessible in the Outlook ribbon. This enables you to quickly add emails as a document to a project with just one click.



The screenshot shows the Outlook interface with the InLoox ribbon active. The ribbon includes options like 'New Email', 'New Items', 'Recent Projects', 'Create Task', 'Save Email', 'Track Time', 'Delete', 'Reply', 'Reply All', 'Forward', 'Move', 'Rules', 'OneNote', 'Assign Policy', 'Unread/Read', 'Categorize', 'Follow Up', 'Search People', 'Address Book', and 'Filter Email'. A dropdown menu for 'Recent projects' is open, listing several projects with IDs and titles, such as '2016-0031: Product Brochure', '2016-0030: Trade Show', '2016-0027: Media Consulting', '2016-0032: Rita Meyer's Project', '2016-0029: Customer Events 2016', '2016-0006: Networking Events 2016', '2016-0028: Software Roll Out', and '2016-0026: Public Relations 2016'. Below the dropdown, an email preview is visible, showing a message from Gordon Newman assigned a new task. The task details include: 'Activity: New Company Website', 'Duration: from: 06/06/2016 8:30 pm to: 06/30/2016 7:00 pm', and 'Effort: 24,0 hours'. The bottom status bar shows 'ITEMS: 50 UNREAD: 3 ALL FOLDERS ARE UP TO DATE. CONNECTED TO: MICROSOFT EXCHANGE'.

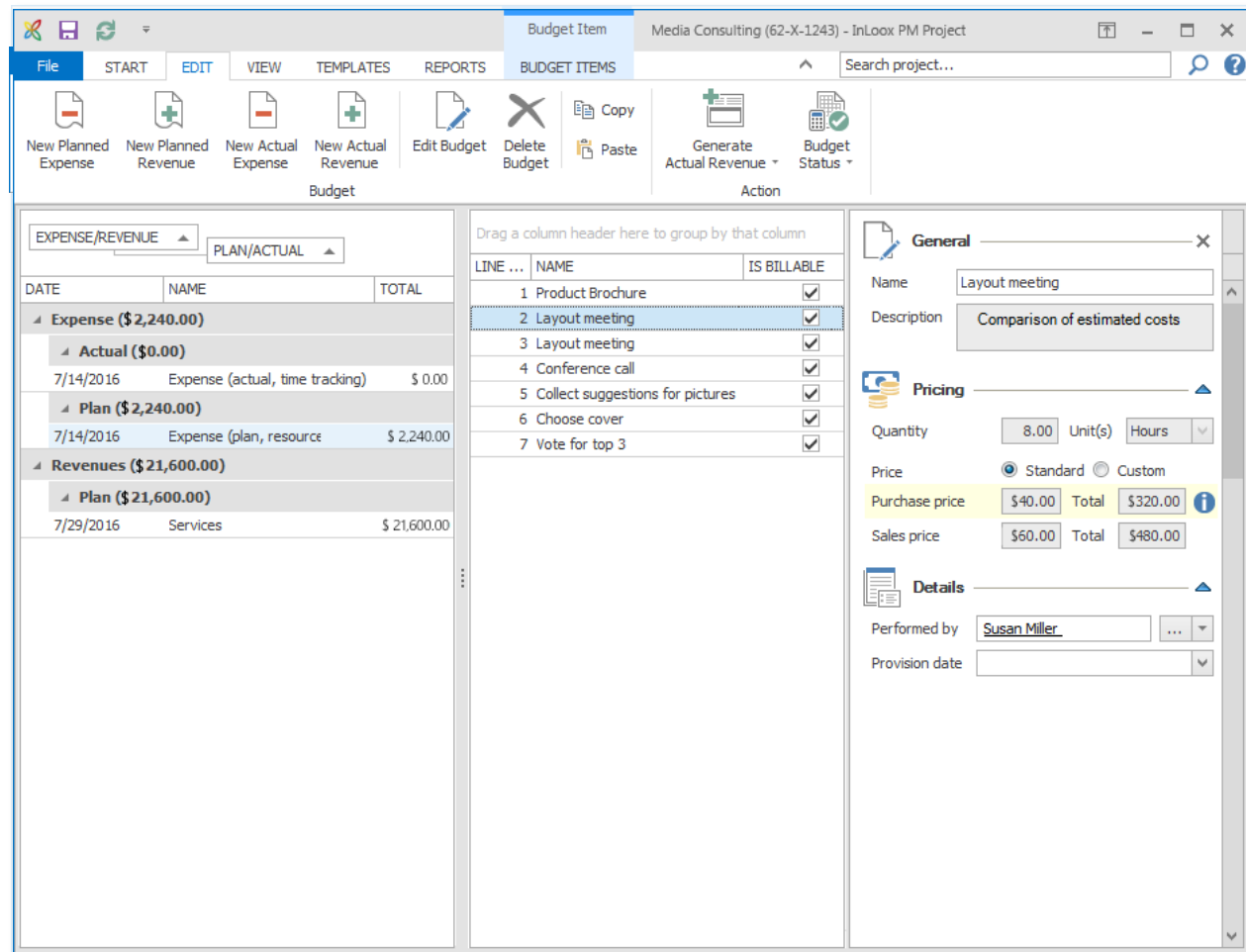
Project budgets made easy

Defining a project budget is easy with InLoox for Outlook: Compare **planned and actual expenses and revenues** and keep your budget spending under control.

InLoox uses **planning positions**, time **tracking entries** and **third-party-costs** to calculate the project budget.

You can also bill **continuous project costs**.

InLoox automatically accesses prices, quantity and units from a **company-wide budget positions index**.



The screenshot shows the 'Budget Item' window in InLoox PM Project. The window title is 'Media Consulting (62-X-1243) - InLoox PM Project'. The ribbon includes 'File', 'START', 'EDIT', 'VIEW', 'TEMPLATES', 'REPORTS', and 'BUDGET ITEMS'. The 'BUDGET ITEMS' ribbon has buttons for 'New Planned Expense', 'New Planned Revenue', 'New Actual Expense', 'New Actual Revenue', 'Edit Budget', 'Delete Budget', 'Copy', 'Paste', 'Generate Actual Revenue', and 'Budget Status'.

The main area is divided into three panes:

- Left Pane:** A summary table with columns 'DATE', 'NAME', and 'TOTAL'. It shows 'Expense (\$2,240.00)' with an 'Actual (\$0.00)' entry for 7/14/2016 and a 'Plan (\$2,240.00)' entry for 7/14/2016. It also shows 'Revenues (\$21,600.00)' with a 'Plan (\$21,600.00)' entry for 7/29/2016.
- Middle Pane:** A table of budget items with columns 'LINE ...', 'NAME', and 'IS BILLABLE'.

LINE ...	NAME	IS BILLABLE
1	Product Brochure	<input checked="" type="checkbox"/>
2	Layout meeting	<input checked="" type="checkbox"/>
3	Layout meeting	<input checked="" type="checkbox"/>
4	Conference call	<input checked="" type="checkbox"/>
5	Collect suggestions for pictures	<input checked="" type="checkbox"/>
6	Choose cover	<input checked="" type="checkbox"/>
7	Vote for top 3	<input checked="" type="checkbox"/>
- Right Pane:** A 'General' tab with fields for 'Name' (Layout meeting), 'Description' (Comparison of estimated costs), 'Pricing' (Quantity: 8.00, Unit(s): Hours, Price: Standard selected, Purchase price: \$40.00, Total: \$320.00, Sales price: \$60.00, Total: \$480.00), and 'Details' (Performed by: Susan Miller, Provision date).

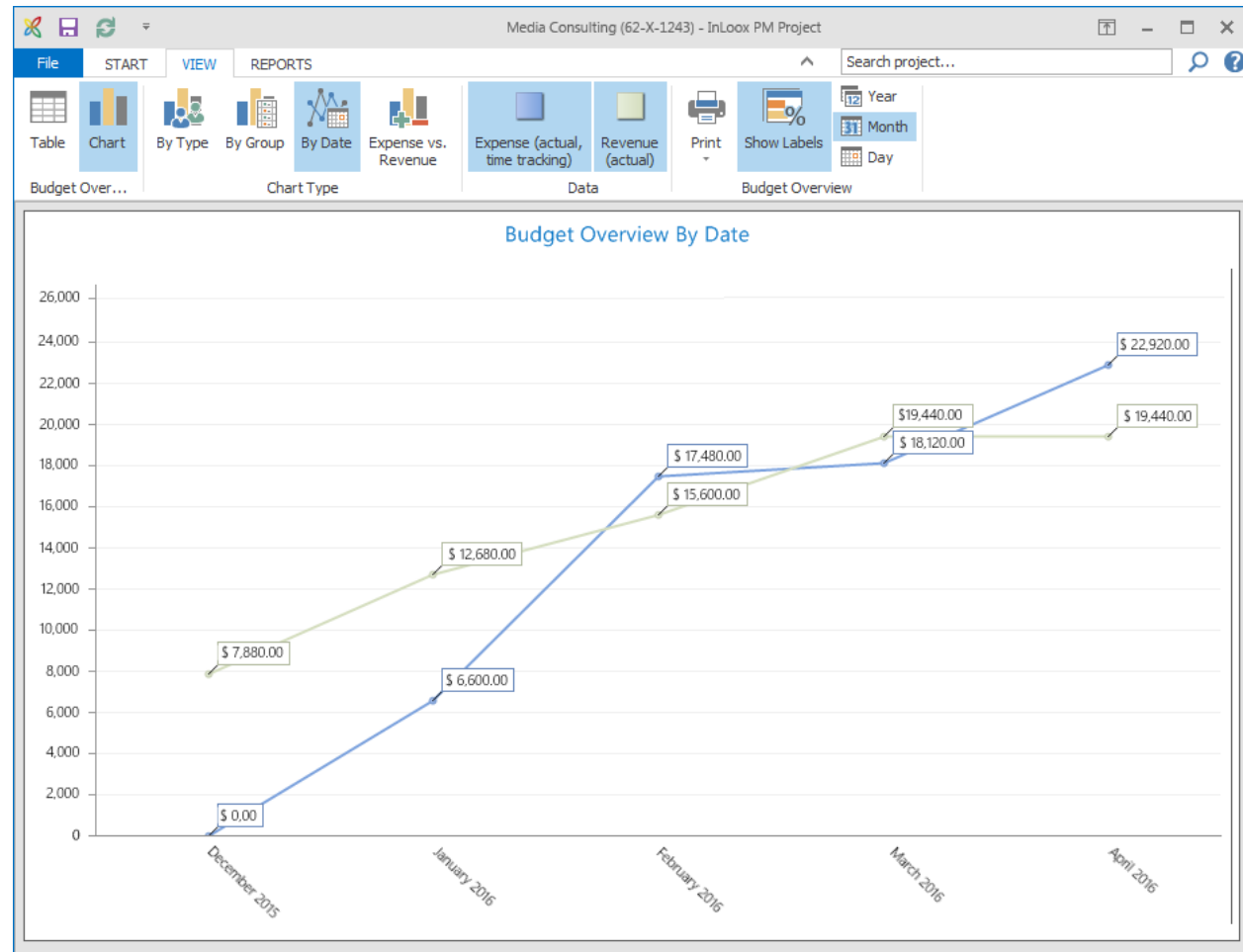
Budget overview

A **comparison of planned and actual expenses** is visualized in graphs and diagrams.

InLoox is your early warning system – **budget overruns are highlighted** to alert you to possible financial risks.

Select different **types of cost items** to be displayed.

Automatically generate **monthly cost projections** to help you track project costs.



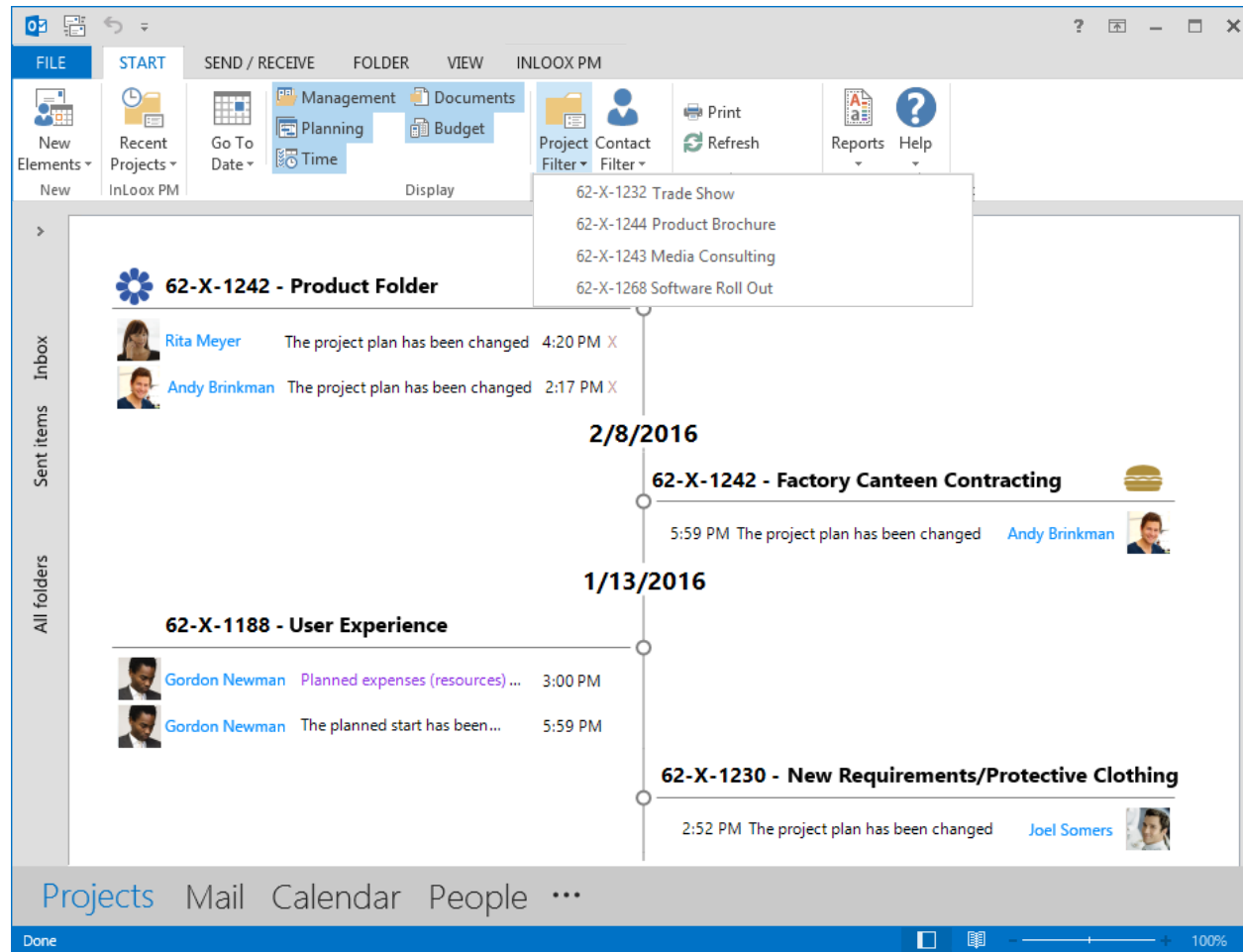
Project timeline

Project history

The **project timeline** displays important changes in all your projects chronologically.

Click on a project or project element to **directly access** it.

Use filters to only see **your own projects** or to only see **changes made on a specific date**.

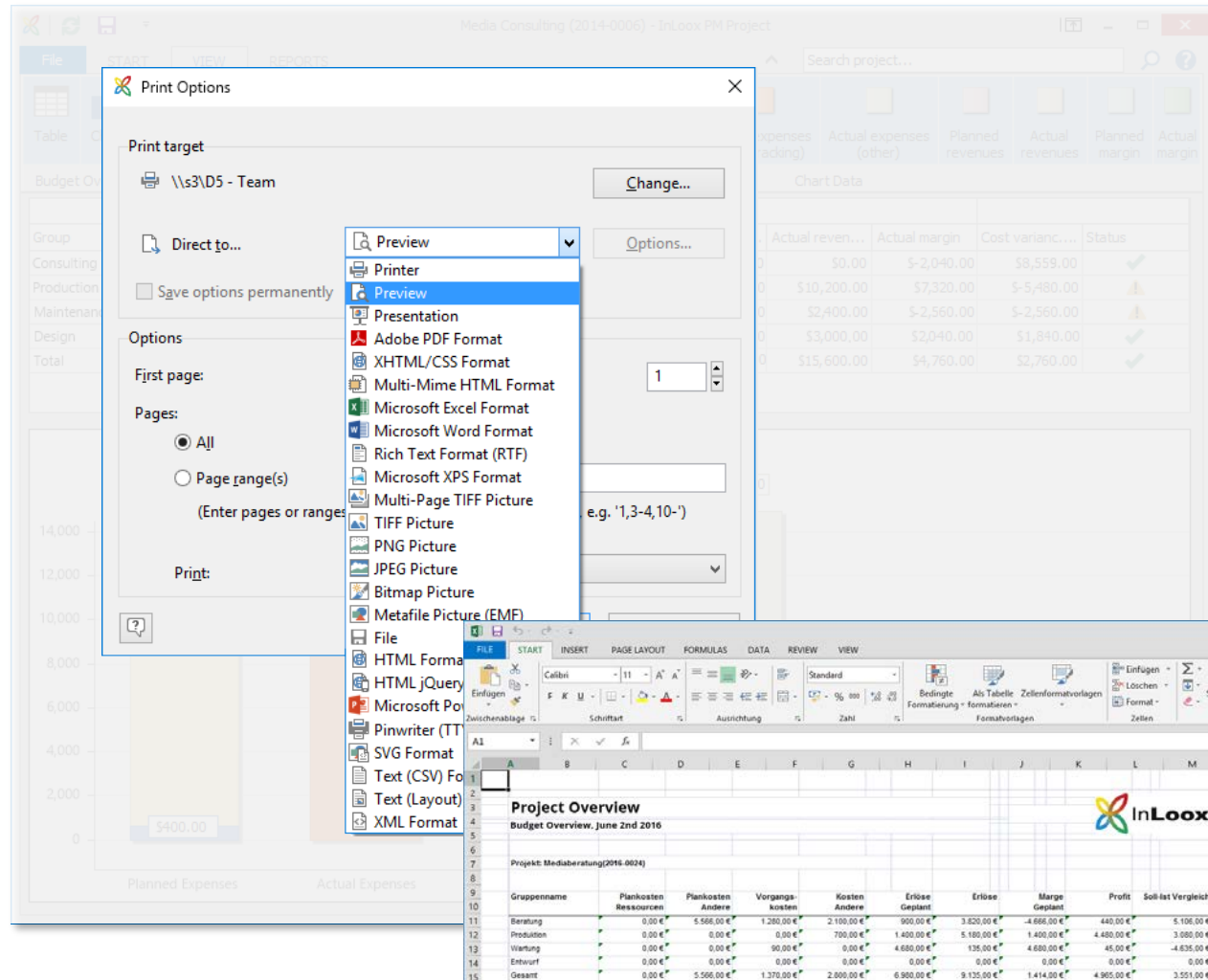


Create comprehensive reports

Create a project report with just one click and make them available in various formats

Supported formats are: Microsoft Word, Excel, RTF, PDF, HTML etc.

Customize report templates with the **InLoox Report Designer** (standard feature).

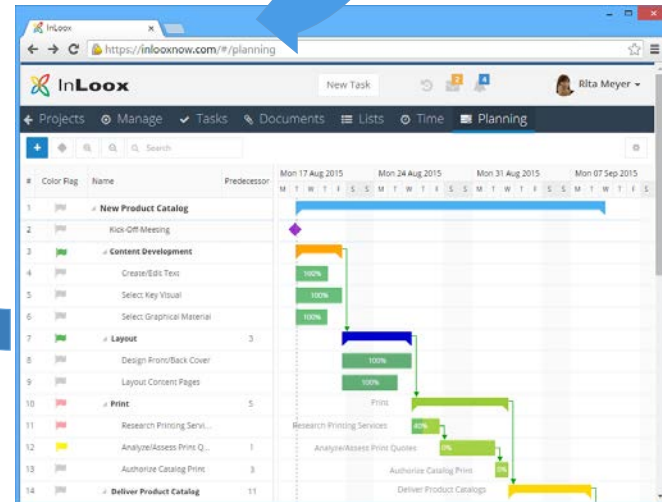
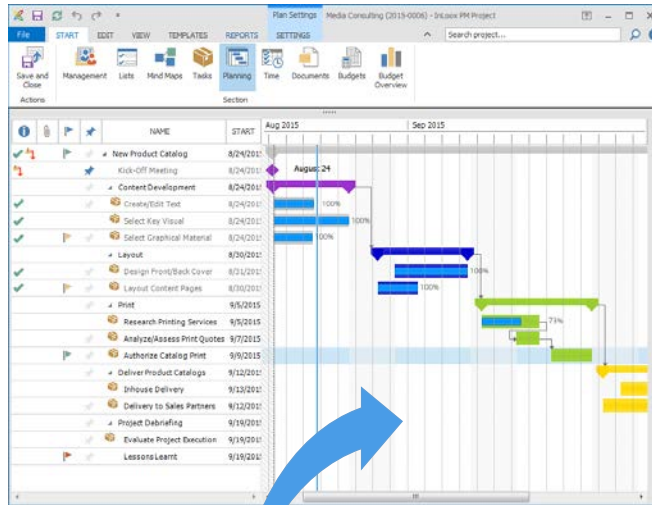


In combination with InLoox 9 Web App

Use InLoox for Outlook in combination with InLoox Web App

Work on one project data base, keeping all your project data up-to-date – whether you access it via InLoox for Outlook or Web App.

InLoox Web App makes it easy to collaborate with external project partners, geographically dispersed project team members, and anybody who is not using Outlook.



In your local network or as a service



InLoox for Outlook in your network

Recommended for

- ✓ Enterprises and globally operating businesses
- ✓ SMBs with their own IT department
- ✓ Everyone who wants to host their project data on their own servers



InLoox for Outlook as SaaS

Recommended for

- ✓ Departments without IT support
- ✓ Freelancers
- ✓ Small businesses

General information

- InLoox has been a standard software since 2003
- Over 50,000 users worldwide
- Available in 5 languages
- Customers in 50 countries, on 5 continents



Read how InLoox helped companies across all industries become more efficient, productive and competitive: <http://www.inloox.com>

Thank you for your attention!

InLoox for Outlook and InLoox Web App are software distributed by:

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