

InLoox



Project management – integrated into Outlook

Documentation

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

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NEW FEATURES IN A FAMILIAR ENVIRONMENT

The project management package InLoox operates within Outlook, simplifying the combined administration of projects, documents, resources and budgets and providing highly effective support for everyday standard business processes.

InLoox provides a current overview of the status and development of all projects, including incurred costs and budgets. It is thus possible to call up all financial data during the course of the project and to have the latest situation at your fingertips. InLoox ensures a high level of planning and scheduling reliability and furnishes comprehensive project documentation. Your project team, as well as your partners and customers, will appreciate this greatly. InLoox can be learned in the shortest time and is easy to use and simply structured.

Further information about the InLoox product range, updates and new versions can be found on the internet.

To be sure of a smooth start with InLoox, please read first the chapter on Basics.

CONTACT AND SUPPORT

Thank you for choosing the integrated project management system **InLoox**.

InLoox is a product of IQ medialab GmbH in Munich. As a customer of IQ medialab you are entitled to the manufacturer's direct service and support. We are also pleased to answer any questions you may have about the product generally during the normal office hours of 9:00 am till 5:00 pm Monday to Friday except public holidays. Please note that we are in the CET time zone (GMT+1).

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Everyday Tasks

EVERYDAY TASKS

Get to know the basic features of InLoox - via a series of brief instructions.

Tip: Basic knowledge of Microsoft Outlook is assumed. If you have any general questions concerning the setup or use of Outlook, please look up the Microsoft Outlook Help or ask your system administrator.

What would you like to do?

- Create a new project
- Open a project
- Find a project
- Record an activity or a document
- Generate a project plan
- Check resource workload
- Display or process work packages
- Save files and documents
- Create a budget
- Create an invoice
- Monitor a project
- Lock or complete a project
- Create a report
- Define views

Working with Projects

CREATING A NEW PROJECT

A brief summary of how to create a new InLoox project:

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
*Outlook switches to the **InLoox project overview***
2. Double-click on an empty field or use the button **New Project**
A new project is opened
As creator of the project you will automatically be registered as project manager
3. Input the required information, e.g. **Project name** or **Customer**
The list of customers contains a preliminary selection of all companies participating in InLoox projects
4. Click on **Save and Close**

Continue with Open project

OPENING A PROJECT

A brief summary of how to open an InLoox Project:

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
*Outlook switches to the **InLoox project overview***
2. Double-click on one entry in the list, e.g. **Demo project**
The selected project is opened
3. Click on a tab, e.g. **Document**
4. Input new entries or make any required changes
5. Click on **Save and Close**

Or:

1. Click on the button **Recent Projects** in the **InLoox Toolbar**
2. Select a **project** from the list which displayed

Continue with Finding a project

FINDING A PROJECT

A brief summary of how to search for information in all InLoox projects:

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
*Outlook switches to the **InLoox project overview***
2. Input a search text into the field **Search**, e.g. **InLoox**
3. Click on **Start search**
InLoox carries out the search. A list of results is displayed
4. Double-click on one entry to open the required project

Or: **Use views**

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
*Outlook switches to the **InLoox project overview***
2. Select a view from the **Aktuelle Ansicht** area in the **InLoox Toolbar**, e.g. **Grouped by managers**
3. Double-click on one entry to open the required project

Or: **Use filter**

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
*Outlook switches to the **InLoox project overview***
2. The **filter row** is above the list of projects:

The image shows a screenshot of the InLoox project overview interface. At the top, there is a text box that says 'Drag a column header here to group by'. Below this is a dropdown menu with 'Name' selected. Underneath the dropdown is a search input field containing the text '*Demo*'. Below the search field is a list of project entries, with 'Demo Project' visible.

*Filter row with active filter ***Marketing****
3. Input text, e.g. **Marketing** and press **ENTER**
InLoox filters the Projects according to the criterion ("Project name contains Marketing")
4. Double-click on one entry to open the required project

Continue with Record an activity or a document

RECORDING AN ACTIVITY OR DOCUMENT

A brief summary of how to record an activity or document in an InLoox project:

Method A: Adding directly from Outlook

1. Select an **email**, for example, from your personal Outlook Inbox (or any other Outlook folder)
2. Click on the button **Add element...** in the **InLoox Toolbar**
*The dialog box **Select project** is displayed.*
3. Select a **Project**
4. Select the action to be taken:
 - **Record new activity**
Activities are records of time spent for a project, e.g. work carried out
 - **Add to document folder**
Documents are files which are assigned to a project
 1. Select the action InLoox is to take on the attachment, if present
Details of this feature can be found under Attachment management
 2. Select a **sub-folder** if needed
 3. Select **Link document to activity**
InLoox will then display a paper clip (📎) in the Activities area under the **Activities** tab.
The paper clip gives access to all documents linked to a given activity.
5. Click in **OK**
*If you have selected the option **Create new activity**, the dialog box **New activity** is displayed*
6. Please input at least the following:
 - **Date and time** (proposed automatically)
 - **Duration**
 - **Group**, to which the activity belongs
or alternatively: the **Phase** to which the activity belongs
7. Click on **OK**

Method B: Open a project and add via the project form

1. Open a project or create a new one
2. Click on the button **New** in the **Activities** area under the **Activities** tab.
*The dialog box **New Activity** is displayed.*
3. Please input at least the following:
 - **Date and time** (proposed automatically)
 - **Duration**
 - **Group**, to which the activity belongs
or alternatively: the **Phase** to which the activity belongs

4. Click on **OK**
5. Click on the **Document** tab
6. Create a new entry in the **Documents** area:
 - Click on **New**
*The dialog box **New document** is displayed:*
 - Select a **type**, e.g. **File**
 - Specify the **path** of the document. Click on the button "... " to open a search window
 - Specify whether InLoox is to copy the document **into the project folder**
 - Select if required an **activity**, to which the document is to be linked.
InLoox then displays a **paper clip** (📎) in the Activities area under the **Activities** tab.
 - The following additional information can also be input:
 - **Status**, e.g. **completed** or **awaiting release**
 - **Notes** (multiple-line) for comments and remarks
 - Click on **OK**
If sp defined, InLoox will copy the document automatically to the project folder
7. Click on **Save and Close**




Continue with Create a project plan

Planning








CREATING A PROJECT PLAN

Concise instructions on the planning of a project:




1. Open a project or create a new one
2. Click on the **Planning** tab
3. Under **Planning**:
 - Click on **New...**, then on **Phase** or **Milestone**
*The dialog box **New Phase** or **New Milestone**, respectively, is displayed.*
 - Enter at least a **Name** and a **Group**
Enter a **time period** (for a phase) or a **date** and **time** (for a milestone)
 - The following can also specified under the **Standard** tab:
 - **Location**
 - **PSP code** ("Work breakdown structure code"), to permit easier identification of an element
 - **Element cannot be moved on the timeline**
Specifies that the element cannot be postponed or brought forward
 - Enter additional information under the **Details** tab:
 - **Flag**, for color highlighting
 - **Description** (multiple-line), e.g. for work instructions
 - **Progress** (for a phase, as a percentage)
4. Optional: Select a predecessor:
 - Click on the **Linking** tab
 - Select an **available successor** in the list left
 - Click on **Add (>>)**
5. Optional: Add resources:
 - Click on the **Resources** tab
 - Click on **add**
*The dialog box **New Resource** is displayed.*
 - Click on the button "..."
*The dialog box **Select contact** is displayed.*
Select a **contact** or a **distribution list**
 - Click on **Select >>**
 - Click on **OK**
 - Specify separately for each resource:

- **Notification** via **email, task request**, appointment request or **InLoox Task**
In this case *resources are informed automatically.*
 - Change **Workload** (only for a phase)
 - This task is already completed indicates whether the resource has completed the assigned work.
- Click on **OK**
 - Check if needed the workload
6. Click on **OK** to close the dialog box
 7.  Use the mouse to adjust the sequence and duration of elements.
Hold down the **Ctrl** key and **drag** predecessors and successors between phases and milestones with the mouse
 8.  Use the Shift key when moving or expanding elements in order not to affect predecessors and successors
 9.  Zoom, by holding down the **Ctrl** key and scrolling with the mouse wheel
 10. To save the project, click on **Save and Close**

The following symbols may appear alongside the **planning elements**:

-  A check mark shows that the element is **completed**
-  An alert symbol shows that an element **lies in the past** but has not yet been **completed**
-  A flag highlights an element
-  A pin shows that an element is fixed, i.e. **cannot be moved** along the timeline
-  The symbol resource shows that resources have been assigned to the element
-  The symbol resources have completed work shows that all resources of an element have completed their tasks successfully
-  A paper clip is displayed alongside an element to which documents are linked

Elements can be rearranged as follows:

-  moves the selected elements upwards or downwards
-  assigns the selected element to the **element** above it
The element above is automatically incorporated in a grouping.
-  assigns the selected element one grouping level higher

Continue with Check resource workload





CHECKING RESOURCE WORKLOAD

Concise instructions for checking a resource's workload:

The **Resources Overview** can be called up in three different ways:

- Click on the menu command **Tools >> Resource Overview** in the **InLoox Toolbar**
*In this case the Resources Overview shows **all** resources of all projects existing*
- For an opened project:
*In this case the Resource Overview shows **all** resources of the selected project*
 1. Open a project or create a new one
 2. Click on the **Resource Overview** button in the **Toolbar** or use the key combination **Ctrl + O**
- For an opened planning element:
*In this case the Resource Overview shows **all** resources of the selected phase*
 1. Open a project or create a new one
 2. Switch to the **Planning** tab
 3. Click on **New >> Phase**
 4. Switch to the **Resources** tab
 5. Click on **Workload**

Uses of the **Resource Overview**:

- Check one specific **resource** by clicking on it
*A graphical overview of the **workload** in the specified time period is displayed*
- A yellow field () indicates that a resource is **occupied but not overloaded** in the specified time period
A shaded yellow field () indicates that a Resource is **overloaded** in the specified time period
- It is possible to change the workload of a resource by editing the relevant phase
-  **enlarges** or **reduces** the view
-  **updates** the view
- The option **Show** Exchange Calendar displays or hides the information of the Free/Busy service of Microsoft Exchange Server.
When display is activated InLoox takes account of the Exchange Server calendar information when calculating the workload

Continue with Display or process work packages

DISPLAYING AND PROCESSING WORK PACKAGES

A brief summary of how to transfer work packages to your calendar or task folder:

If you are planned into an InLoox project, the project planner can pass information to you in various ways:

- by automatic **Outlook task or meeting request**
- by automatic **email**
- by **InLoox task**

Option 1: by **Outlook task or meeting request (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.
2. You see the following **planning data**:
 - **Project name and number**
 - **Time frame or date**
 - Your own **effort**
 - **Location**
 - involved **resources**
3. You have the following options:
 - **agree**, whereupon Outlook automatically creates an entry in your **task list** or **calendar**.
 - **decline**

Outlook reports the response to the project planner. In the case of a task request the project planner is kept constantly formed about the progress of and changes to all tasks assigned to you.

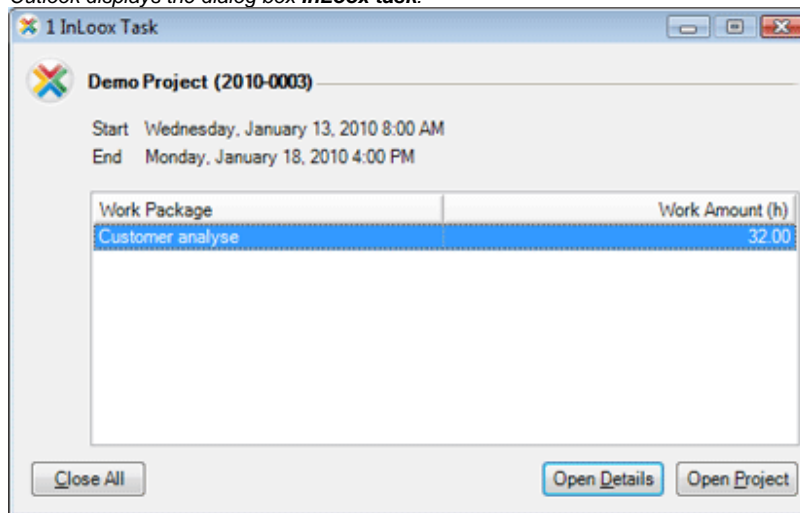
Option 2: by **email (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.
2. You see the **planning data**:
 - **Project name and number**
 - **Time frame or date**
 - Your own **effort**
 - **Location**
 - involved **resources**
3. You have the following options:

- **accept** and create an entry in your **calendar or task list** manually.
- **decline** and reply in free form via your email software.

Option 3: by **InLoox task** (*)

1. Outlook displays the dialog box **InLoox task**:



2. Click on an entry in the list. You see the **planning data**:

- **Project name and number**
- **Time frame or date**
- Your own **effort** (in hours)

3. Click on one of the following:

- **Open details**
Further information on the task is displayed
- **Open project**
The project is opened
- **Close all**
Closes the dialog box


4. You see the open InLoox tasks in the **InLoox Task Overview**. You are **informed automatically of any changes**.

(*) The type of communication is selected by the project planner. Users without InLoox can only be informed via **task request, meeting request or email**. The project planner can also decide to withhold information from a resource.

Continue to Storing files and documents

STORING FILES AND DOCUMENTS

A brief summary of how to assign files, Outlook objects and internet addresses to a project:

1. Open a project or create a new one
2. Click on the button **New** in the **Document** tab
*It may be necessary to enter the project number and the customer name in the **Manage** tab.
The dialog box **New Document** is displayed.*
3. Proceed as follows:
 - Select a **type**, e.g. **file**
 - Specify the **path** of the document. Click on the button "... " to open a search window
 - Specify whether InLoox is to copy the document **into the project folder**
 - Select as required an **activity** to link the document to an activity.
InLoox displays a **paper clip** () in the Activities area under the **Activity** tab
 - Add other information as appropriate:
 - **Status**, e.g. **complete** or **awaiting release**
 - **Notes** (multiple lines), for comments and remarks
 - Click on **OK**
InLoox copies the document into the project folder automatically if so specified.
4. **Tip:** Documents can be added to the list with **Drag and Drop**
5. Click on **Save and Close**

Alternative method: **Save directly from mail inbox**

1. Select for example an **email** from your personal Outlook inbox
2. Click on the button **Add element...** in the **InLoox Toolbar**
*The dialog box **Select project** is displayed.*
3. Select a **project**
4. Activate the option **Add to document folder**
5. Specify how InLoox should process any attachments
Details of this feature are to be found under Attachment management.
6. Click on **OK**

Continue with Create a budget

Working with Budgets

CREATING A BUDGET

A brief summary of how to create a new budget document:

1. Open a project or create a new one
2. Click the tab **Budget**
3. Create a new document in the **Budget** area:
 - Click on **New >> Expenses**
*The dialog box **New Budget** is displayed.*
 - Specify a **Date**
 - Select the **Status**, e.g. **open**
 - Enter a **Name**, e.g. **Estimation** or **Customer offer**
 - You can also add **assets** from an existing document belonging to the same project (e.g. Costs).
Details of this feature can be found under Add Asset
 - Click on **OK**
InLoox creates a new budget.
4. Add an **item** manually:
 - Click on the **Plus sign (+)** on the right
*The dialog box **New item** is displayed:*
 - Select a **Group**
 - Select an **Asset**
InLoox loads the data from the InLoox Assets
 - Change the **Name, description, Quantity, Unit price** or **Amount** as required
 - Click on **OK**
5. Optional: export the budget:
 - Flag one budget in the list at left. Click on **Report...**
 - Select a report
 - Output the budget to Excel or as a PDF or Word document or send it by email
6. Click on **Save and Close**

Continue with Create an invoice

CREATING AN INVOICE

Concise instructions on creating an invoice:

1. Open a project or create a new one
2. Click on the **Budget** tab
3. Create a new document in the **Budget** area:
 - Click on **New >> Invoice**
*The dialog box **New Budget** is displayed:*
 - Input a **Date**
 - Select the **Status**, e.g. **open**
 - Input a **Topic**, e.g. **Invoice** or **20% discount**
 - You can also add **assets** from an existing document (e.g. calculation) from the same project. Details of this feature can be found under Adding Assets.
 - Click on **OK**
InLoox creates a new Budget.
4. Add **items** manually:
 - Click on the **plus sign (+)** on the right
*The dialog box **New Asset** is displayed:*
 - Select a **Group**
 - Select an **Asset**
InLoox loads the information from the InLoox Budget Assets
 - Change **Description, Quantity, Unit price** or **Total**
 - Click on **OK**
5. Optional: export the invoice to Excel, Word or Adobe PDF:
 - Flag one invoice in the list on the left. Click on **Report >> Expenses / Calculations / Invoice**
 - Print the invoice or send it by email
6. Click on **Save and Close**

Continue with Project controlling

PROJECT CONTROLLING

Concise instructions on project controlling:

1. Open a project
2. Click on the **Budget** tab
3. Click on the button **Overview**.
The overview area is displayed
4. In the **overview** area you will see the figures cumulated by **Group**
Details can be found under **Budget: Overview area**
5. Optional: export the report to Microsoft Excel:
 - Click on **Report >> Budget Overview**
 - Print the report or send it by email
6. Click on **Save and Close**

Further instructions on project controlling:

- Check the totals under the columns **Actual costs, Revenues (actual)** and **Margin (actual)**
- A line marked in red (🔴) shows an anticipated **negative result**

Use specific views to carry out controlling for more than project at once:

1. Click on button **InLoox Folder** in the **InLoox Toolbar**
Outlook switches to the InLoox project overview
2. Select a **view** from the **InLoox Toolbar**, e.g. **Project controlling**
3. Double-click to open the required project

Continue with Locking and completion of projects

COMPLETING OR BLOCKING A PROJECT

Concise instructions on completing or blocking a project:

1. Open a project
2. Click in the **Time/Status** area:
 - Select **locked** in the **Mode** list
The project can now only be edited or deleted by authorized users.
 - Select **Completed** or **Aborted** as status
3. Click on **Save and Close**

Continue with Create report

CREATING A REPORT

A brief summary of how to create a report:

1. Click the button **InLoox Folder** in the **InLoox Toolbar**
*Outlook switches to the **InLoox Project overview**.*
2. Select one or more projects from the list with the mouse
3. Click the menu item **Reports >> Create Report...** in the **InLoox Toolbar**
Details of the report generator are to be found under Creating and editing reports
4. Select a **report template** from the list and click **OK**
 - InLoox transfers the data - for example to Excel, Word or an Adobe PDF file
 - Print the document or send it by email

Continue to Define views

DEFINING VIEWS

A brief summary of how to create and save views:

1. Click the button **InLoox Folder** in the **InLoox Toolbar**
Outlook switches to the InLoox project overview.
2. Click the list **Current View**
3. Select a view from the list, e.g. **Project Controlling**
4. Change the view in the InLoox Folder (e.g. filter, sort, Grouping, field selection)
5. Click **Save current view** in the **InLoox Toolbar** (under **Current View**)
 1. Enter a **view name**
 2. Select whether the view is for **all users** to see or just for yourself
 3. Click **OK**
The new view is created.

Continue to Create a new project

Basics

INLOOX BASICS

This chapter contains a description of the structure and basic features of InLoox. Basic knowledge of Microsoft Outlook is required.

If you have any general questions about the installation or operation of Outlook, please refer to the Microsoft Outlook Help or ask your system administrator.

The structure of InLoox is very simple and consists of the following:

1. the **InLoox Toolbar**, which is displayed at all times
2. the **InLoox Folder**, an overview of your InLoox projects
3. the individual **InLoox Projects**, which are to be found in the Project overview
4. the **InLoox Task Overview**, which shows currently open and completed work packages
5. the **InLoox Options**, which govern base parameters and permissions

Important:

- Users should read the chapter on **Everyday tasks** thoroughly
- Administrators should also read the chapter on **Detailed information**

InLoox Toolbar

INLOOX TOOLBAR

Once the **InLoox installation** has been successfully completed on your computer you will see the **InLoox Toolbar**:



The **InLoox Toolbar** is always displayed and provides the following commands:

1. **InLoox Folder**: switches to the **InLoox Project Overview** in the InLoox Folder. The InLoox Folder is comparable to an email, calendar task folder. The InLoox Folder can be located on a network server or on your own hard disk, depending on the version installed.
2. **Recent Projects**: displays a list of projects, organized by project number, opened most recently. A maximum of ten projects is stored per user. A click on an entry opens the project, provided it has not been deleted in the meantime. This feature provides faster access to projects you are currently working on.
3. **Current View**: provides a list of different versions of the project overview and includes view customizing. It is possible to set up common views for all users or personalized views just for your own use.
4. **Add to Project...**: select for example an email or a calendar entry. A click opens the dialog box to record an **activity** or **document** for a project. It is possible to post emails, tasks, contacts, journal entries and calendar entries directly from Outlook to a project. Further information can be found in the chapter on Adding an element.
5. **Reports**: transfers the data from a project to a variety of document and file formats. Select one or more projects from the **InLoox Project Overview** and click on **Reports >> Create Report**. You can store your own report definitions (e.g. filters). Further information can be found in the chapter on Creating and Editing reports
6. **Tools**: this is where for example supplementary functions such as the **InLoox Options** can be called up, Software licences managed, or the user interface language defined. In the **InLoox Workgroup** and **Enterprise Edition** some of these commands are reserved for the InLoox administrator.

ADDING AN OUTLOOK ELEMENT TO INLOOX

A significant advantage of InLoox is its close integration with Outlook. To record activities (dates and effort) and documents (e.g. emails or attachments) for a project, use the button **Add to Project...** in the **InLoox Toolbar**.

Detailed information on the recording of entries can be found in the chapter on Hints: adding elements.

Proceed as follows:

1. Select for example an email from your personal Outlook inbox (or any other folder)
2. Click on the button **Add to Project...** in the **InLoox Toolbar**
*The dialog box **Select Project** is displayed.*
3. Select a **project**
4. Select the action to be taken:
 - **Create new activity**
Activities are records of time spent for a project e.g. work carried out
 - **Add to document store**
Documents are files assigned to a project
 1. Select the **Operation** InLoox is to carry out with the attachment - if any
Details of this feature can be found in the chapter Attachment Management
 2. Select if required a **Subfolder**
 3. Select **Link document with activity**
InLoox will then display a paper clip (📎) in Activities under the **Activity** tab.
The paper clip can be used later to access all documents linked to the activity.
5. Click on **OK**
*If the option **Create new activity** was selected, the dialog box **New Activity** is displayed.*
6. Please enter at least the following:
 - **Date and Time** (these are set automatically and can be changed if needed)
 - **Duration**
 - **Group**, to which the activity belongs
or alternatively the **Phase** to which the activity belongs
7. Click on the button **OK**

Note

The following standard elements can be posted directly to an InLoox project: emails, contacts, tasks, journal entries and calendar entries.



Non-standard message types are **not** supported by InLoox.

Hint

It is possible to customize the project list view. Click with the right-hand mouse button on a column header. A **popup menu** is displayed. Insert new fields or hide insignificant ones with the command **Choose fields**. Filter the project list with the command **Display filter**.

HINTS: ADDING ELEMENTS

A few practical hints to assist the everyday use of the button **Add element**:

- Maintain data promptly - especially when many activities have to be recorded per day. Advantage: nothing gets forgotten, you colleagues can always see the latest situation and you save yourself trouble of the awkward reconstruction work and the end of the day or month. The project is always fully documented
- Keep your calendar in such a way you can always show it to a third party without having to explain this or that entry. Proper recording of time, work and documentation is automatic, since activity descriptions do not have to be written anew each time. You also benefit from a clearer overview of your daily work
- Post entries that are related to more than one project separately for each one. Do not forget to allocate the time correctly
- Microsoft Outlook creates journal entries automatically for work with Office documents (e.g. Word, Excel or PowerPoint) and records also how long the documents were **open**. Use the journal entries as a memory aid for recording work and time in InLoox

Automatic time recording for Outlook journal entries is carried out as follows:

1. Click on **Tools >> Options** in the Outlook menu
2. On the tab **Preferences** click on the button **Journal Options...**
3. The list **Also record files from** shows all installed Microsoft Office products. Activate all entries.
4. Click on **OK**
5. Click on **OK**

Now you can post the automatically created journal entries in the usual manner using the button **Add element** in the **InLoox Toolbar**. The duration is automatically recorded by InLoox. **Important:** Check for each posting that the times automatically recorded by Outlook are correct. It can be that the document was not being viewed for the whole time it was opened









ATTACHMENT MANAGEMENT

Information on using InLoox in connection with Outlook elements **with attachment**:

When you insert an Outlook element with attachment into an InLoox project, there are various processing options.

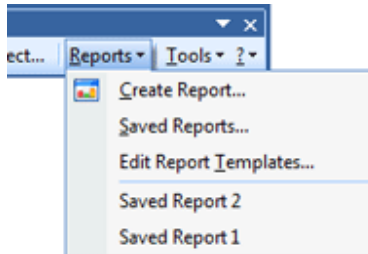
Outlook elements such as emails, tasks or calendar entries can be inserted via the **InLoox Toolbar** using the button **Add to Project...** or via an opened **InLoox project** using the **Document** tab

The **example of an email** is shown to help you select the most practical method:

Method	Action	Pros & cons
Element with attachment	InLoox assigns the email and the attachment <i>in file form</i> to a project. (Outlook does the same.)	<ul style="list-style-type: none">  Email and attachment are stored together.  The document list shows whether the element is carrying an attachment but no details of the attachment, such as name or type.
Element without attachment	InLoox assigns <i>only</i> the email to the project. All attachments will be removed.	<ul style="list-style-type: none">  Saves storage space.  Attachments can neither be displayed nor saved in InLoox.
Attachment only	InLoox assigns <i>only</i> the attachment to the project. The email is discarded.	<ul style="list-style-type: none">  Removes superfluous correspondence.  Correspondence (including notes) can neither be read nor saved in InLoox.
Element and attachment separately	InLoox assigns the email and attachment to the project <i>separately</i> .	<ul style="list-style-type: none">  Correspondence is kept. Attachments can be seen in the document list with name and type.  Relationship between correspondence and attachments is lost.

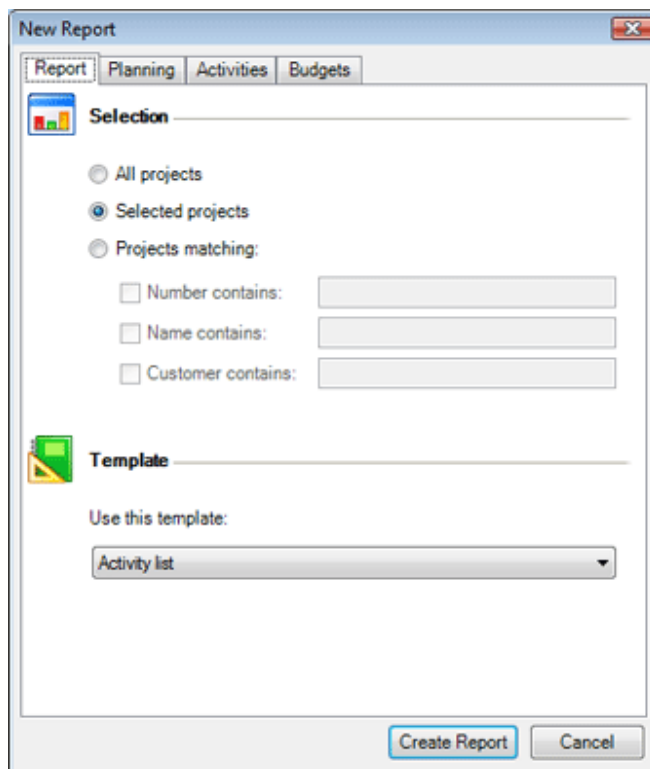
CREATING AND EDITING REPORTS

Under **Reports** in the **InLoox Toolbar** it is possible to output analyses and summaries in a wide variety of file formats.



To create a report

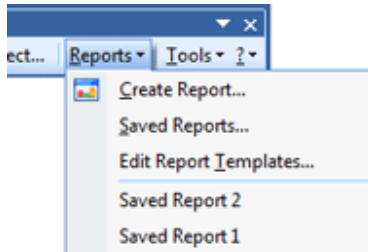
1. Select one or more projects from the **InLoox Project Overview**
2. Click on **Create Report...**
*The dialog box **New Report** is displayed*



3. Specify the **Selection** and select a **Template**
4. Optional: Filter the report data
5. Optional: **Save** the report for faster access
Details can be found in the chapter on Saving reports
6. Click on **OK**
*InLoox creates the report. The dialog box **Output Parameters** is displayed.*
7. Select the required **Output Parameters** and click on **OK**

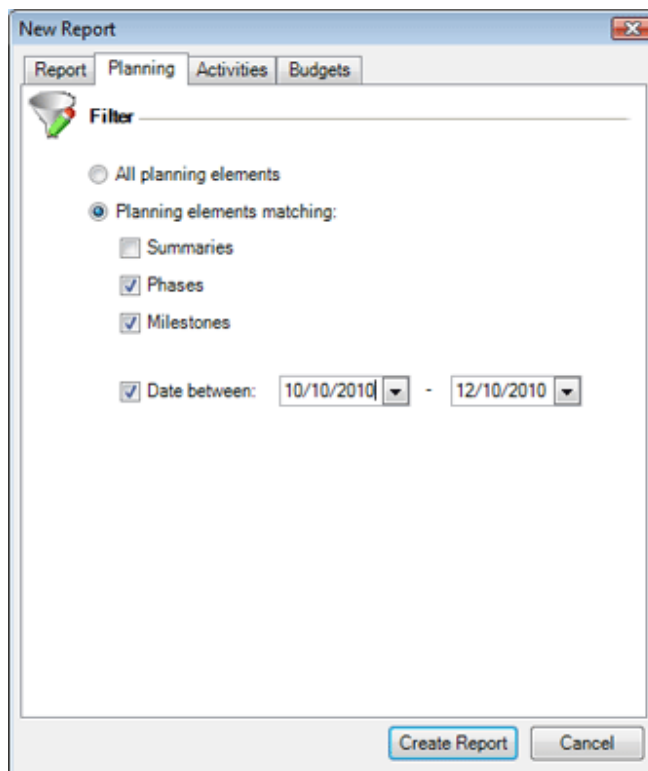
FILTERING REPORT DATA

Under **Reports** >> **Create report** in the **InLoox Toolbar** it is possible to output analyses and summaries in a wide variety of file formats.



Filtering Data

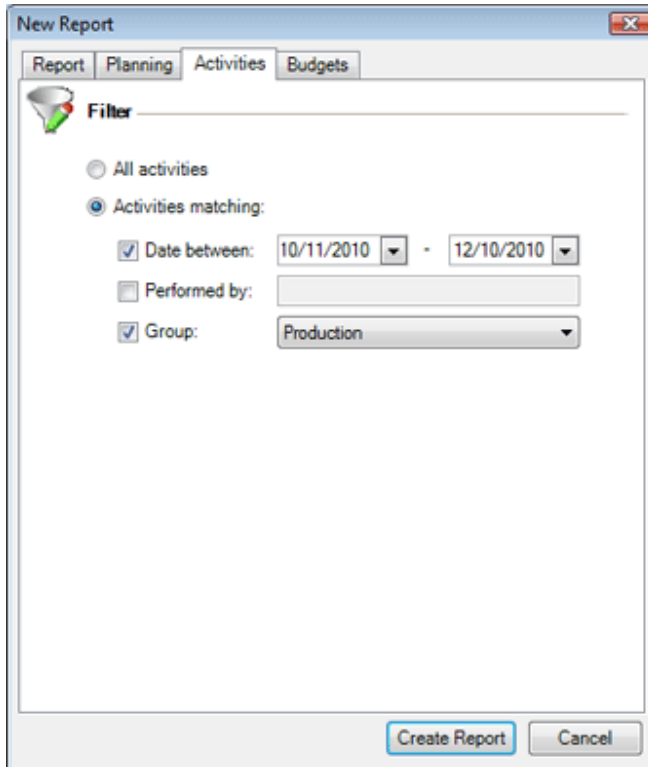
1. Data can be filtered in the dialog box **New Report** in a number of ways:



Filter for the Planning Page:

- Select **All planning elements** to include the entire list of planning elements
- Select **Following planning elements** only to filter:
 - **Grouping**, to transfer grouping elements (phases with sub-elements)
 - Filter **Phases** and **Milestones** by switching off the relevant parameters

- The time interval can also be restricted by specifying ("**Date between**")



The screenshot shows a 'New Report' dialog box with four tabs: 'Report', 'Planning', 'Activities', and 'Budgets'. The 'Activities' tab is selected. Under the 'Filter' section, there are three radio buttons: 'All activities', 'Activities matching:', and 'Following activities only'. The 'Activities matching:' option is selected. Below it, there are three checked options: 'Date between:' with date pickers set to '10/11/2010' and '12/10/2010', 'Performed by:' with an empty text box, and 'Group:' with a dropdown menu set to 'Production'. At the bottom right, there are 'Create Report' and 'Cancel' buttons.

Filter for the Activities Page:

- Select **All activities** to include the entire list of activities
- Select **Following activities only** to filter:
 - by **date interval**
 - by name of person **carrying out** the activity
 - by **group**

The screenshot shows a 'New Report' dialog box with a 'Budgets' tab selected. The 'Filter' section is active, showing options for budget types and filters. The 'Budgets matching:' section is selected, with 'Activity costs', 'Expenses', and 'Invoices' checked. The 'Date between:' field is set to '10/10/2010' - '12/10/2010'. The 'State' dropdown is set to 'Accepted'. The 'Show assets:' section has 'already billed' and 'not yet billed' checked. The 'Create Report' and 'Cancel' buttons are visible at the bottom.

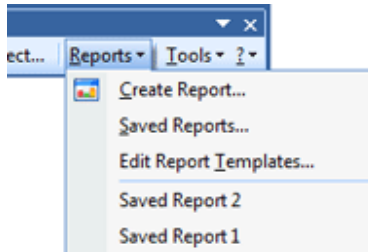
Filter for the Budget Page:

- Select **All Budgets** to include the entire list of budgets and Budget assets
- Select Following budgets only to filter:
 - by type (**activity costs, calculations, costs, invoices**)
 - by **date interval**
 - by **budget state**
 - by **billing state** of each asset

SAVING REPORTS

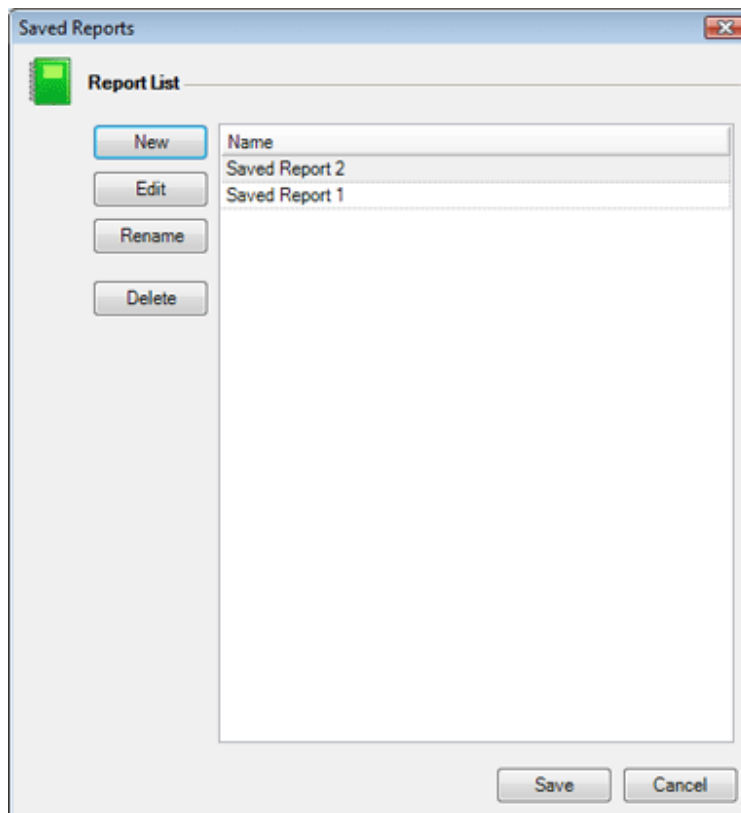
In the **InLoox Toolbar** under **Reports** >> **Saved reports** it is possible to store and manage reports under a user-defined name for quick and easy access.

Saved reports can be found under the Menu **Reports** in the **InLoox Toolbar**:



To manage **saved reports**

1. Click on **Saved reports ...**
*The dialog box **Saved reports** is displayed*



2. A new report is created by clicking on **New** and can be stored away under a recognizable name
3. An existing report can be changed by clicking on **Edit**
4. Click on **Save**
*New reports can now be viewed under the menu **Reports** in the **InLoox Toolbar***

InLoox Project Overview

INLOOX PROJECT OVERVIEW

Click on InLoox Folder in the **InLoox Toolbar**. A project overview is displayed. Each entry shows information on one project. The normal display includes all projects for which you have permission.

Information on daily work can be found in the chapter on Hints on the InLoox project overview

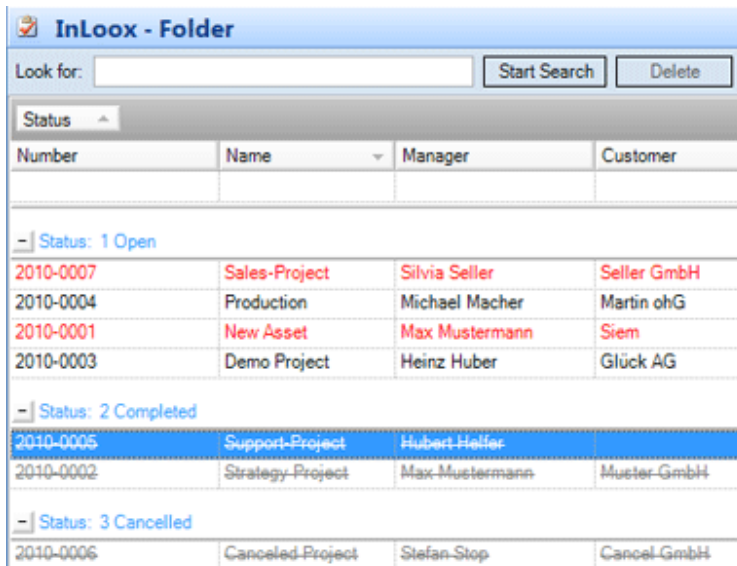
Important **features** of the project list include:

- A double-click on **an entry opens** an existing **InLoox project**
- A double-click on **an empty field creates** a new **InLoox project**
- A keystroke switches to the project whose name begins with the **corresponding letter**.
- The search list permits any information, including within a project, to be found quickly.

The **format** is as follows:

- projects displayed in **red** are **overdue**
- projects **striked-out** are completed or discontinued.

Sample view:



Number	Name	Manager	Customer
- Status: 1 Open			
2010-0007	Sales-Project	Silvia Seller	Seller GmbH
2010-0004	Production	Michael Macher	Martin ohG
2010-0001	New Asset	Max Mustermann	Siem
2010-0003	Demo Project	Heinz Huber	Glück AG
- Status: 2 Completed			
2010-0005	Support-Project	Hubert Helfer	
2010-0002	Strategy-Project	Max Mustermann	Muster-GmbH
- Status: 3 Cancelled			
2010-0006	Cancelled-Project	Stefan-Stop	Cancel-GmbH

The following short-cut keys are available for the project overview:

- F4: create new InLoox project
- F2: update project list

- Ctrl + P: print project list
- Ctrl + A: select all projects

HNITS ON THE USE OF THE PROJECT OVERVIEW

We have gathered some information on the **InLoox Project Overview** for new users of Outlook. The basics described here also apply to all other Outlook folders. They will help you to optimize your personal productivity and keep better track of your project work

Hints:

- You can define new **views**, for example projects with open budgets or projects sorted by state. Do take advantage of this facility. Select a different view from the list **Current view** in the **InLoox Toolbar**. More information on this topic can be found in the chapter on Defining views
- Search through the project list for relevant information that you have input for your projects, no matter whether it be an offer, a contact, a specific amount or a note in the activities. You can also use filters to seek out a specific project or reduce the view to shows only the data you need. More information on this topic can be found in the chapter on Finding Projects
- You can also modify the columns of the project overview. All Outlook sorting, filtering and grouping features can be used in the **InLoox Project Overview**. More information on this topic can be found in the chapter on Hints on the use of personalized views

InLoox Project

INLOOX PROJECT

A double click on an entry in the **InLoox Project Overview** opens the corresponding **InLoox project**. It is possible to create a new project by double-clicking on an empty field in the Project Overview or by clicking the button **New Project**.

The entire information on an InLoox project is contained in a form consisting of five pages:

1. The **Manage** page contains the project header information. This includes project number, name, customer, persons in charge, contact persons, objectives and degree of urgency.
2. The **Planning** page provides a chronological overview of the project in the form of phases and milestones. Resources, dates, duration and interdependencies are held in the database. Automatic planning communications and project cost estimation facilities are available.
3. The **Activities** page lists all activities carried out by project team members (time and effort), events and notes. Thus, this page shows activities **already performed**.
4. The **Documents** page supports the straightforward management of all documents concerned with the project. Outlook elements, internet links and information are assigned to the project. Documents can be opened and edited within InLoox.
5. The **Budget** page is for the management of expenses, calculations and invoices. All budgets are assigned a state and can be exported using a simple procedure. The budget overview maintains an ongoing comparison of planning, activity costs and budgets. A cost controlling facility displays all amounts summarized by Group and highlights negative items.

Information on the Menu and Toolbar in the InLoox Project can be found here.

Manage Page

MANAGE PAGE

The **Manage** Page is the principal starting point for anyone involved in the project. This aspect of InLoox can be looked upon as a **portal** through which all significant project data can be looked up and stored away in condensed, structured form.

Information in the **Manage** Page:

- **Detailed information** on the page areas Project, Time / State, In charge, Custom and Notes
- **Concise instructions on** how to create a new project and lock or discontinue a project
- Descriptions of the **dialog box** Categories and of Menus and Toolbars

The screenshot shows the 'Manage' page for a project named 'Demo Project (2010-0003) - InLoox Project'. The interface is divided into several sections:

- Project:** Fields for Name (Demo Project), Number (2010-0003), Customer (Glück AG), and Categories (New Business).
- In charge:** A list of roles with associated names: Manager (John Smith), Team (Jeff Robertson, Helen Ramirez), Customer (Michael Anderson), Partner, and More.
- Time / Status:** Status (1 Open), Start (1/1/2010), End (12/31/2010), Priority (normal), and Mode (open). There is also a checkbox for 'Fixed deadline'.
- Custom:** A table with columns 'Name' and 'Value'. The rows are CurrentStatus, Custom, JobNumber, and NextStep.
- Notes:** A text area containing the following content:

Last modified by John Smith on 10/10/2008 4:24 PM
 InLoox - Project management directly inside 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

Gemeinsam arbeiten
 Work together
 Сотрудничать
 Trabaja juntos

MANAGE PAGE: PROJECT AREA

Detailed information on **Manage Page**: elements, features and descriptions.

The **Project** area:

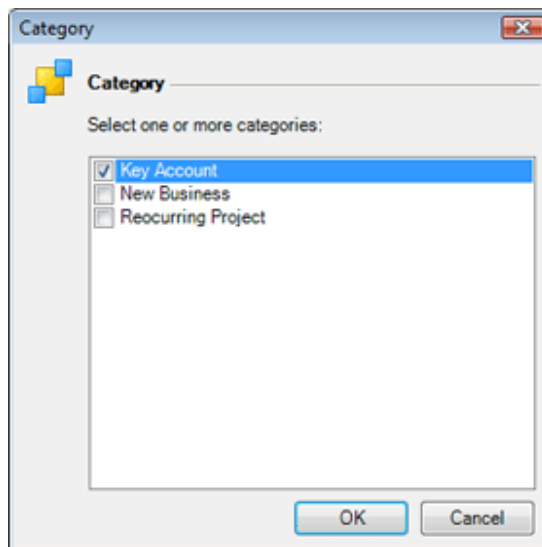
Element	Description
Name	Freely definable short description of the project. The project name can be used more than once.
Number (mandatory)	Unique project number. Once assigned, this number cannot be changed by the user. This field is a mandatory input . The format of the project number can be customized under InLoox Options
Customer	Customer name. For internal projects a department or business area can be named. InLoox will display a selection list of the customer names already entered for all visible projects.
Categories...	Enter a defining characteristic for the project, e.g. customer initials, internal department name or business area. The category is freely definable. This field helps the sorting and selection of similar projects from a large project base. Clicking on a button causes the dialog box Categories to be displayed

MANAGE PAGE: CATEGORIES DIALOG BOX

Detailed information on the **Manage** Page: An existing project is assigned to a category as follows: A category is a keyword or expression that is useful in project administration for searching, finding, filtering or grouping projects.

A brief summary of how to use categories

1. Open a project or create a new one
2. Click on the button **Categories** in the **Project** area of the **Manage Page**
*The dialog box **Category** is displayed:*



3. Activate the relevant category in the list
4. Click on **OK**




Hint

It is possible to add, change or delete categories. Further information can be found in the chapter on Editing Categories

MANAGE PAGE: TIME / STATE AREA

Detailed information on the **Manage** Page: elements, features and descriptions.



The **Time / State** area:

Element	Description
State	Specify here the state of development of the project. Possible options are In progress , Completed or Discontinued . The project state options can be customized under InLoox Options
Start	Select from the calendar a date for the start of the project. This may also be typed in directly. When a new project is created, today's date is proposed automatically
End	Select from the calendar a date for the anticipated end of the project. This may also be typed in directly. When a new project is created, today's date is proposed automatically. The end date must not be earlier than the start date
Fixed deadline	Specifies whether the end date can be postponed. Typical examples of fixed deadline projects are trade fairs and Christmas card mailings.
Priority	Specifies the urgency of the project. Possible settings are low , normal or high . The standard proposed setting is normal . Projects of low or high priority are flagged in the Project Overview with  or  respectively.
Mode	Select locked to shield the project from any changes. The mode can only be changed by authorized users. Permissions can be changed under InLoox Options for each user separately or on a role basis If mode is set to inactive , project notifications are deactivated. No messages are sent to the project resources
 Hint	Use views to monitor the state of several projects at once. Further information on this can be found in the chapter on Generating personalized views

MANAGE PAGE: IN CHARGE AREA

Detailed information on **Manage Page**: elements, features and descriptions.


The **In charge** area:

Element	Description
Manager...	Click on this button and select from the list one or more managers for the project
Team...	Click on this button and select from the list one or more internal team members or employees for the project
Customer...	Click on this button and select from the list one or more contact persons from the Sold-to party or Customer for the project
Partner...	Click on this button and select from the list one or more contact persons from Partners or Supplier , who are currently involved in the project
More...	Click on this button and specify any other contacts, e.g. quality management staff, heads of department or other stakeholders
 Important	<p>When using InLoox Workgroup or Enterprise Edition, persons in charge may have permissions to access the project. This depends on how InLoox has been configured.</p> <p>Further information can be found in the chapter on User-based permissions in the InLoox Option</p>
 Hints	<p>The following is also possible:</p> <ul style="list-style-type: none"> • View a contact by double-clicking on the name • Create a new contact by clicking on one of the buttons Team..., Customer... or Partner.... There is also a select contact option • Select a mailing list containing for example all members of the customer's project team. Mailing lists are automatically resolved by InLoox • A click with the right-hand mouse button will open a popup menu to delete and alter the sequence of contacts

MANAGE PAGE: CUSTOM AREA

Detailed information about the **Manage** Page: elements, features and descriptions.

The **Custom** area:

Element	Description
List (Name / Value)	For the input and display of supplementary information, for example security rating , risk factor , project code or technical abbreviations . New fields can be added via the dialog box Edit Custom Fields .
 Hint	Define new fields as soon as possible to allow information to be structured. Displays of custom fields within the project and can be sorted, grouped and filtered. Further information can be found in the chapter on Hints on personalized views

MANAGE PAGE: NOTES AREA

Detailed information on the **Manage** Page: elements, features and descriptions.

The **Notes** area:

Element	Description
Title	Displays the date of last update and the name of the person carrying this out, identified by Outlook or Windows account name. In new projects the remark " Not yet created " is to be seen here.
Input field	Multiple-line free text field for the concise recording and sharing of significant project data. Enter here for example the project objective, the order type or internal remarks.

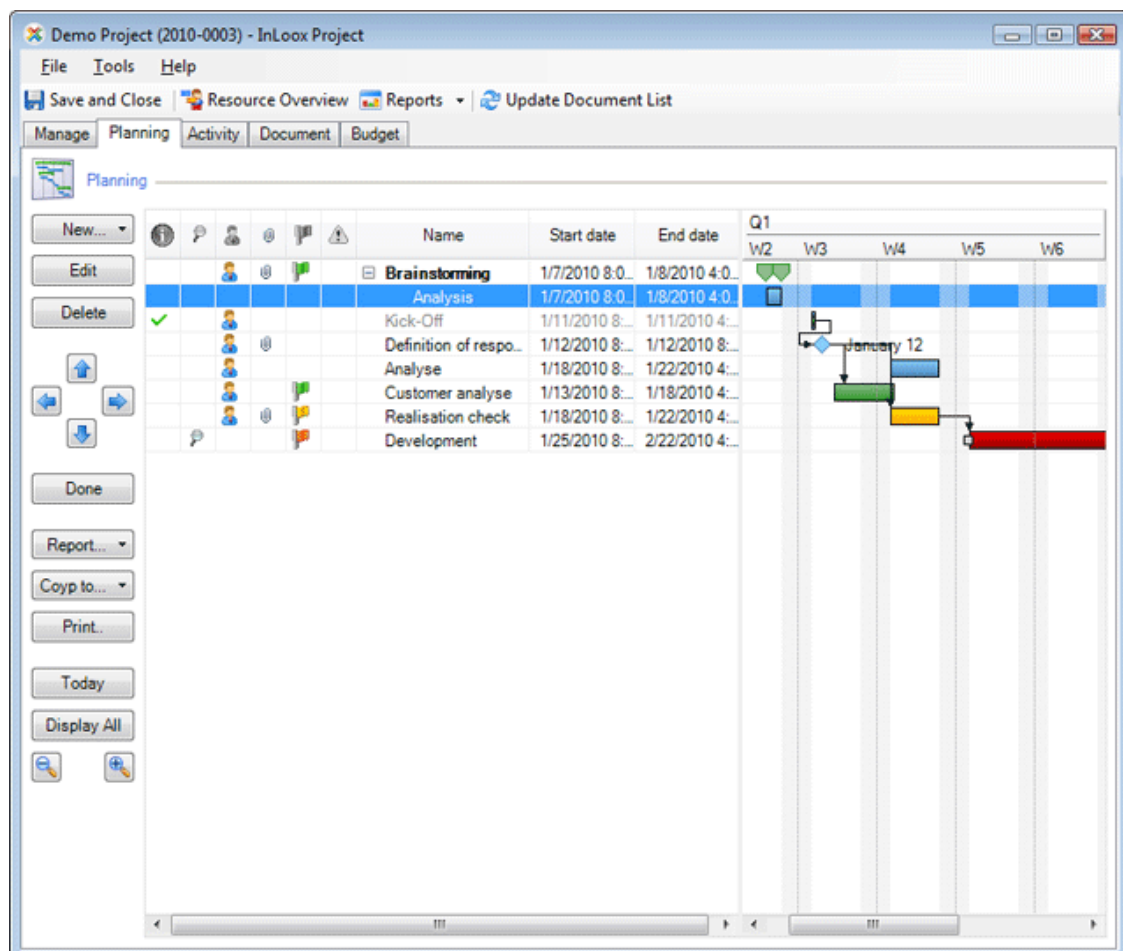
Planning Page

PLANNING PAGE

The Planning Page displays the phases, milestones and resources of a project. **Costs** and **descriptions** of the work steps can also be recorded. Everyone who is involved in the project is kept automatically informed about the planning elements by InLoox or via Outlook. Links to files and internet addresses can also be assigned to specific planning elements if needed

Information on the **Planning** Page:












- **Details** of the areas of the page: Planning
- **Concise instructions** are available: Create planning, Display and process work packages, Create grouping
- Descriptions of the **dialog boxes**: New Phase / Edit Phase, New Milestone / Edit Milestone, New Grouping / Edit Grouping, Load Template, Save template, Resource Overview, Print







PLANNING PAGE: PLANNING AREA

Detailed information on the **Planning** Page: elements, features and descriptions.



The **Planning** Area:






Element	Description
New	Creates a new element in the Gantt chart: Milestone or Phase . A click on this button causes the dialog box New Milestone or New Phase to be displayed, according to type. The element is inserted behind the currently selected element. It is also possible to load or save a planning template.
Edit	Changes the selected element in the Gantt chart. A click on this button causes the dialog box Edit Milestone , Edit Phase , or Edit Grouping to be displayed, according to type.
Delete	Removes the selected element from the Gantt chart.
Up/Down ( / )	Moves the selected element up or down the list.
Group ( / )	 groups the selected element one level deeper.  moves the selected element one group level higher. More information can be found in the chapter on Creating Groupings.
Done	Sets the selected phase to "Done". If the phase has already expired, the alert () is removed.
Report...	Copies the contents of the planning into a report. The report template can be customized. Permission is required. Details can be found under Customizing Report Templates.
Copy to...	Select Task List to create a new Outlook task () in your personal task list. The command Calendar creates a new appointment in your personal calendar (). The data from the selected element (phase, milestone or grouping) are transferred automatically.
Print...	Prints the Gantt chart. Clicking on this button causes the dialog box Print to be displayed.
Today	Switches to today. The red day line is centered in the Gantt chart.
Display all	Adjusts the date interval of the Gantt chart to the project end or start (Manage Page).
Zoom ( / )	Changes the Gantt chart view. Possible values: <ul style="list-style-type: none"> • Years

Gantt chart





- Quarters
- Months
- Weeks
- Days
- Hours
- Quarter-hours
- Minutes
-  Use the mouse to adjust the position and duration of the elements. Hold down the Ctrl key and "draw" the predecessor/successor relationship between phases and milestones. Scrolling with the mouse changes the zoom level
-  Use the shift key when moving or enlarging elements to prevent the successor and predecessor from being influenced
-  Zoom by holding down the **Ctrl** and scrolling with the mouse wheel
- The present time, or day line, is represented by a vertical **red** line
- One click centers the selected element in the Gantt chart
- A **double-click** edits the selected element
- A green bar show the **progress** of a phase in percent (%)
-  A paper clip is displayed beside elements to which documents are linked
- A click on the **minus sign** (⊖) besides a grouping hides all elements belonging to it. The **plus sign** (⊕) causes them to be displayed. See also the commands **Expand all groups** and **Collapse all groups** in the popup menu
- A **context menu** is displayed on clicking with the right-hand mouse button in the Gantt chart. The commands **New Phase**, **New Milestone**, **Edit...**, **Delete**, **Expand all groups**, **Collapse all groups**, **Fix/Unfix**, customize view (**Choose fields**)
- A **context menu** is displayed on clicking with the right-hand mouse button in the header area of the Gantt chart. It allows the customization of the view (**Choose fields**) and the hiding and displaying of specific columns
- If you have no read permission, no planning elements will be displayed

The following symbols are displayed beside the **planning elements**:

-  A check mark shows that the element is **completed**
-  An alert shows that an element **is already overdue** but has not yet been **completed**

-  A flag is used to highlight specific elements
-  A Pin shows that the element is **fixed** (i.e. has a fixed deadline) and **cannot be moved** on the timeline
-  The symbol resource shows that resources have been assigned to the element
-  The symbol resources have completed their work shows that all resources of the element have completed their tasks successfully
-  A paper clip shows elements to which documents are linked


The following short cut keys are available in the **Gantt chart**:

- Ctrl + P: New Phase
- Ctrl + M: New Milestone
- Ctrl + A: Select all elements
- Ctrl + Arrow to right: move selected elements to right (same as )
- Ctrl + Arrow to left: move selected elements to left (same as )
- Ctrl + Arrow upwards: move selected elements upwards (same as )
- Ctrl + Arrow downwards: move selected element downwards (same as )

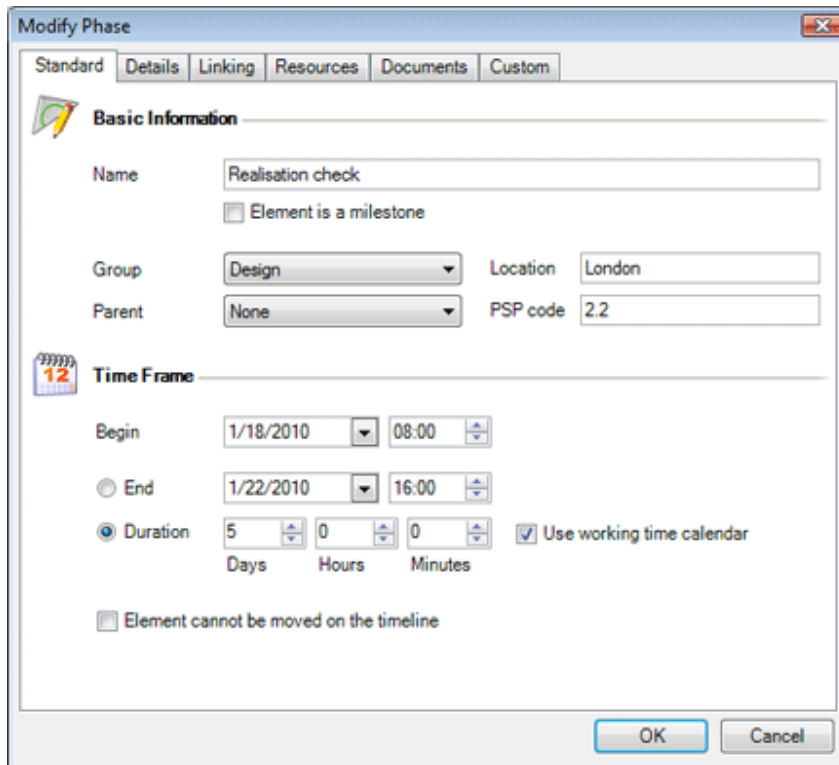
PLANNING PAGE: DIALOG BOX NEW PHASE / EDIT PHASE

Detailed information on the **Planning** Page: Described here is the method for creating a new phase or modifying an existing one.


A phase is a planning step within a time period. It is possible to add resources and successors to a phase. Automatic **notifications** can be added to keep team members, partners and customers informed. **Links** to documentation, files and internet addresses can also be added to a phase.

 Concise instructions for creating a plan are available

The dialog box **New Phase / Edit Phase**: Standard tab






Element	Description
Name (*)	A description for the phase, e.g. Development or Design
Element is a milestone	Indicates the type of element (Phase or Milestone). In this case the flag is not set
Group (*)	Group to which the milestone belongs. The Group can be a sort criterion or a project cost center An internal price per hour is on file for each group . The internal prices per hour and the available groups can be customized under InLoox Options

Parent	Grouping to which the phase belongs
Location	Free text field, in this case, where the activity of the phase is to take place
PSP code	PSP code = Work Breakdown Structure code. Free text field for identifying phases and milestones in large projects
Begin (*)	Date and time of the planned start of the phase. When adding a new phase today's date and the Starting Working Time for the corresponding day of the week are proposed automatically and can be changed
End (*)	Date and time of the planned end of the phase. When adding a new phase tomorrow's date and the Finishing Working Time for the corresponding day of the week are proposed automatically and can be changed
Duration	Length of the phase. Specify the following: <ul style="list-style-type: none"> • Days / Hours / Minutes
Use working time calendar	Specifies whether the duration given is working time (as set down under Working Time Options). Sample: A phase begins on a Friday; the next working day is a Monday. The phase has a duration of one day . If Use working time calendar is activated, the phase ends on mondays , if not, on saturdays
Element cannot be moved on the timeline	Prevents the phase from being moved . If predecessors or successors are moved, the phase does not move but the available buffer time is used up
 Note	(*) These fields are mandatory inputs when adding or modifying phases

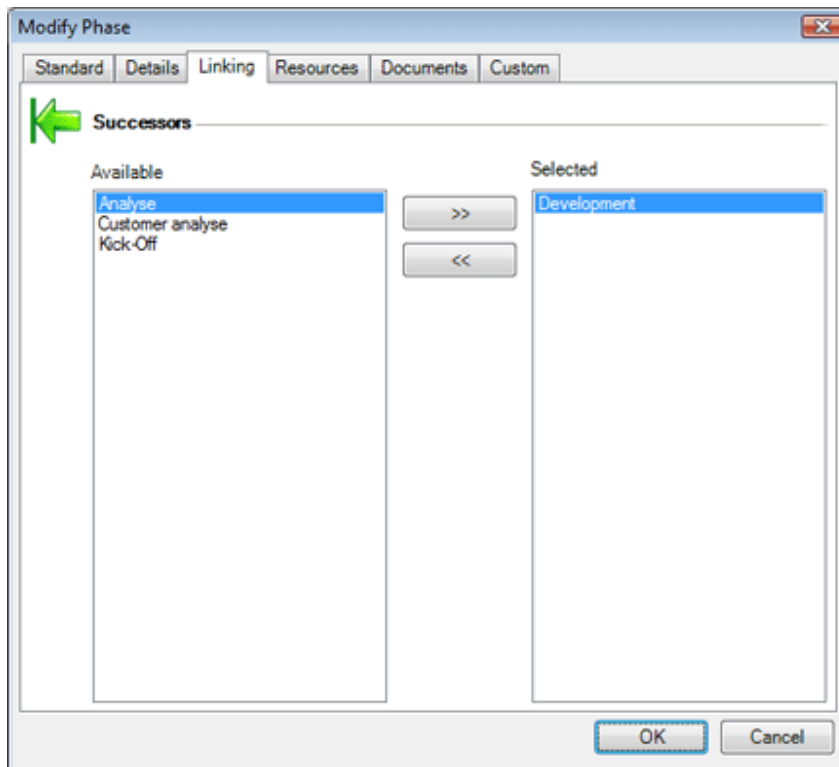
The dialog box **New Phase / Edit Phase**: Details tab


The screenshot shows a 'Modify Phase' dialog box with the following elements:

- Standard** | **Details** | Linking | Resources | Documents | Custom
- Description**: A multi-line text area containing:
 1. Ask several persons about their needs
 2. Fill out question;aire
- Status**:
 - Progress: 0 (with up/down arrows) and a **done** checkbox.
 - Flag: Yellow (with a dropdown arrow).
- Buttons: OK, Cancel

Element	Description
Description	Multiple-line free text field for activities and instructions concerning the phase. Input here the required work results or internal remarks
Progress	Degree of completion of the phase in percent (number between 0 and 100). Click on done to set progress to 100%
Flag	Select a flag for the phase (none,  ,  , ). The phase will be color-highlighted accordingly in the Gantt chart on the Planning Page

The dialog box **New Phase / Edit Phase**: Linking tab



Element	Description
Successors (available)	Select a milestone or phase from this list and click on the button ">>". InLoox creates the chronological interdependency between the phase and the selected successor
Successors (selected)	The list contains all successors of the phase currently being edited. To remove a successor click on the button "<<". InLoox deletes the chronological interdependency between the phase and the selected successor
 Note	InLoox checks the interdependencies and notifies any need to move the start or end of an element

The dialog box **New Phase / Edit Phase**: Resources tab

Modify Phase

Standard Details Linking **Resources** Documents Custom

Resources

Name	Workload (h)	Notification	Completed
Bob Hobbkings	40.00	InLoox Task	<input type="checkbox"/>
Jeff Robertson	40.00	Email	<input type="checkbox"/>

Buttons: Add, Edit, Remove, Workload

Additional Costs

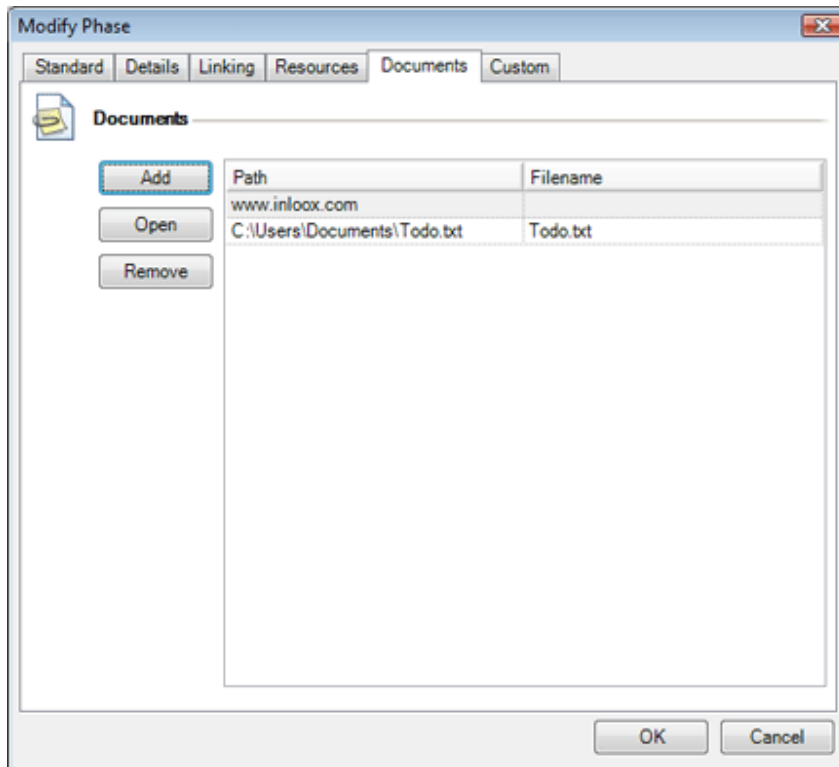
Amount: \$


Buttons: OK, Cancel

Element	Description
Add	<p>Opens the dialog box New Resource</p> <ol style="list-style-type: none"> 1. Click on the button "..." to select a contact. Select on or more contacts from the list and click on OK 2. Select the type of Notification. The notification determines when and how a contact or resource is to be informed . Select one of: (none), Email, Task request, Appointment request, InLoox Task 3. Change the work done of the resource (optional). The workload of the resource in percent in the specified time period is displayed. The work done determines the planned time and costs in the Overview Area (column 2: planned costs resources) on the Budget Page 4. The state shows whether the resource concerned has completed his/her tasks for this phase
Edit	Changes the data of the selected resource
Remove	Removes the selected resource from the list
Workload	Opens the dialog box Resource Overview
Additional Costs	Input an amount to include additional costs for your project plan. These include machine, material and other costs such as travel expenses. The work done determines the planned time and costs in the Overview Area (column 3: planned costs other) on the Budget Page

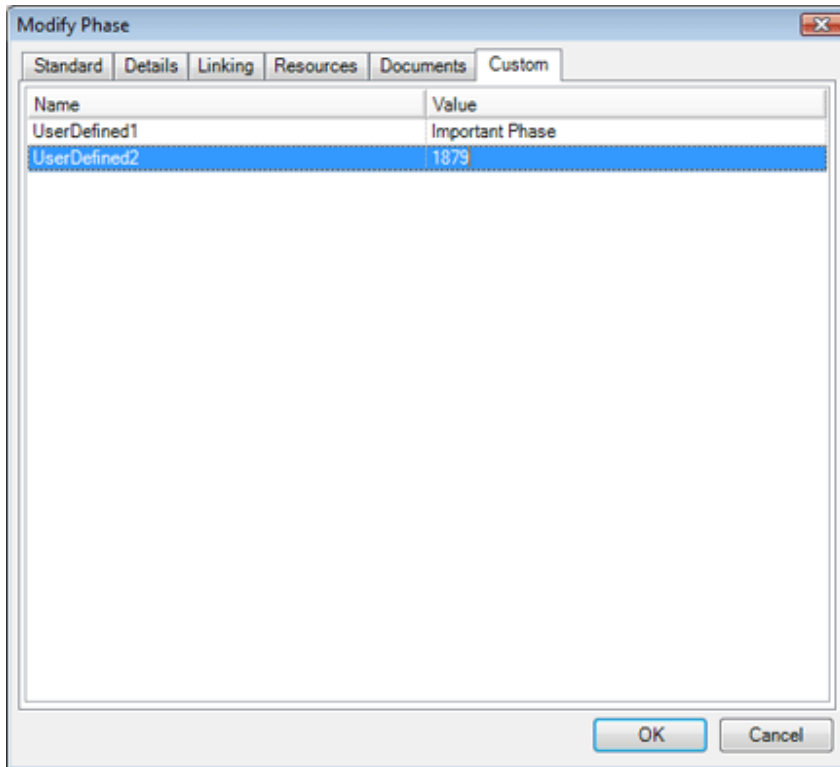
 **Hint:** More information on automatic **notification** can be found in the chapter on Message Types

The dialog box **New Phase / Edit Phase**: Documents tab



Element	Description
Add	Opens the dialog box Add Document Select a document Type (file or internet link), enter a Path and click on OK
Open	Calls up the link or opens the file
Remove	Deletes the selected link from the list
List of documents	 Hint: <ul style="list-style-type: none"> • A double-click calls up the link or opens the file • It is possible to link files on your local computer or on a server with the InLoox project plan. If you are a member of a team, specify the server path for the link to which all project team members have access

The dialog box **New Phase / Edit Phase**: Custom tab


**Element****Description****Custom fields**

For inputting and displaying supplementary data such as **billing information**, **technical abbreviations**, **work location**, etc. New fields can be added using the dialog box **Edit Custom Fields**

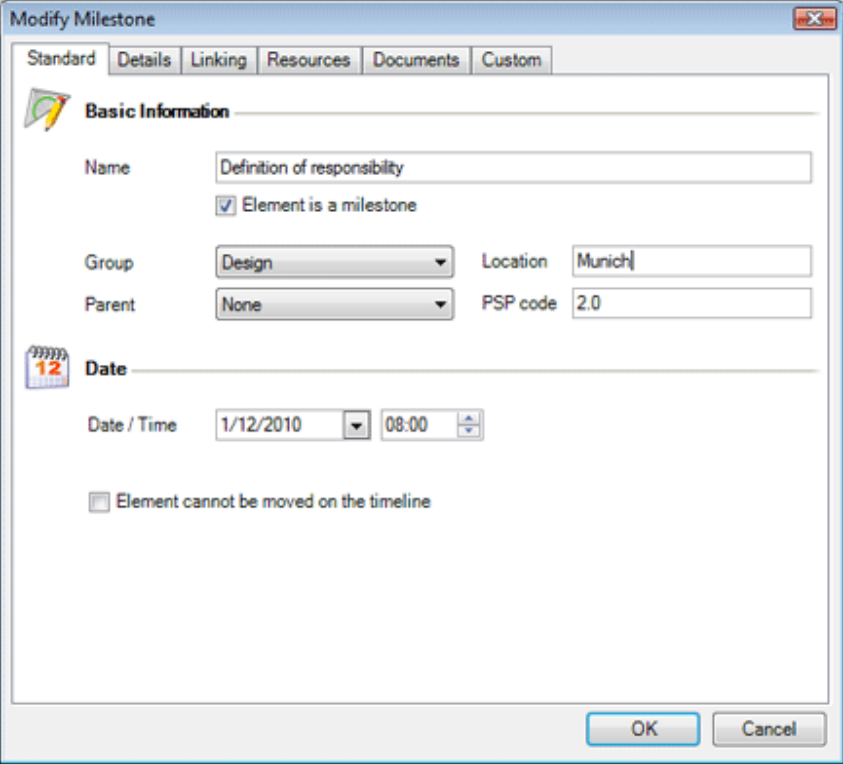
PLANNING PAGE: DIALOG BOX NEW MILESTONE / EDIT MILESTONE

Detailed information on the **Planning** Page: Described here is the method for creating a new milestone or modifying an existing one.

A milestone is a time of completion. It is possible to add resources and successors to a milestone. Automatic **notifications** can be added to keep team members, partners and customers informed. **Links** to documentation, files and internet addresses can also be added to a milestone.


 Concise instructions for creating a plan are available

The dialog box **New Milestone / Edit Milestone**: Standard tab

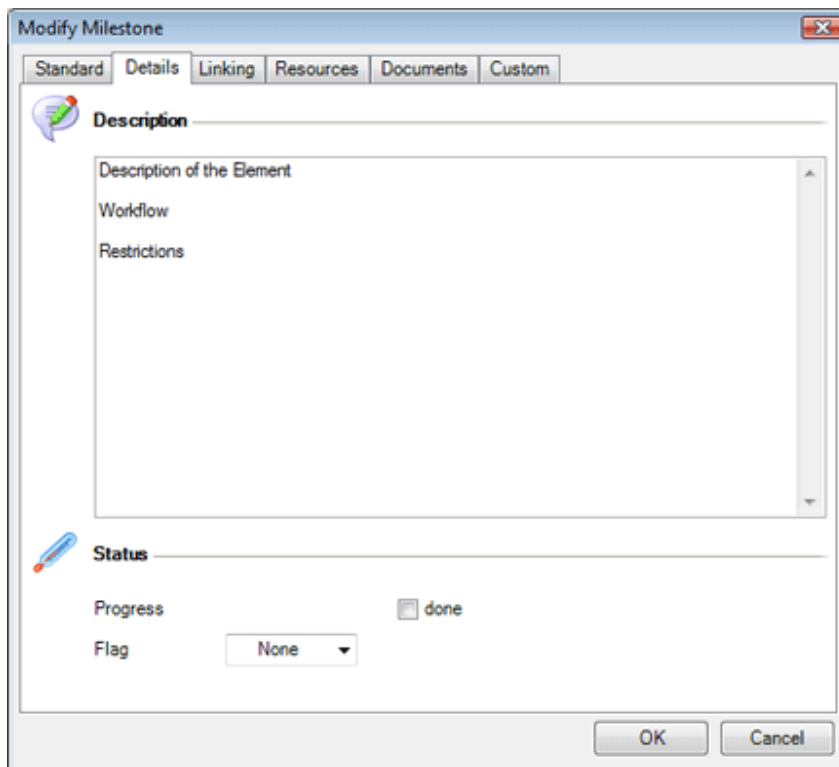





Element	Description
Name (*)	A description for the milestone, e.g. Conclusion or Release
Element is a milestone	Indicates the type of element (Phase or Milestone). In this case the flag is set
Group (*)	Group to which the milestone belongs. The Group can be a sort criterion or a project cost center
Parent	Grouping to which the milestone belongs

Location	Free text field, in this case, where the activity of the milestone is to take place
PSP code	PSP code = Work Breakdown Structure code. Free text field for identifying phases and milestones in large projects
Date / Time	Day and time when the milestone is to be achieved. When adding a new milestone today's date and the current are proposed and can be changed
Element cannot be moved on the timeline	Prevents the milestone from being moved . If predecessors or successors are moved, the milestone does not move but the available buffer time is used up

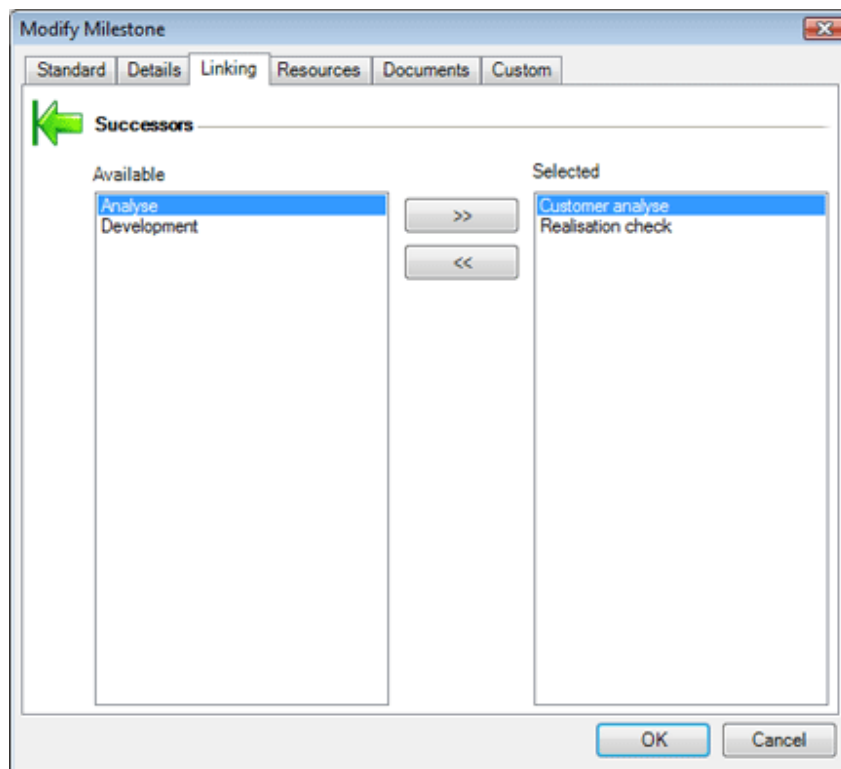
 Note (*) These fields are **mandatory inputs** when adding or modifying milestones


The dialog box **New Milestone / Edit Milestone**: Details tab



Element	Description
Description	Multiple-line free text field for activities and instructions concerning the milestone. Input here the required work results or internal remarks
Progress	Click on done to set progress to 100%
Flag	Select a flag for the grouping (none,  ,  , ). The phase will be color-highlighted accordingly in the Gantt chart on the Planning Page

The dialog box **New Milestone / Edit Milestone**: Linking tab



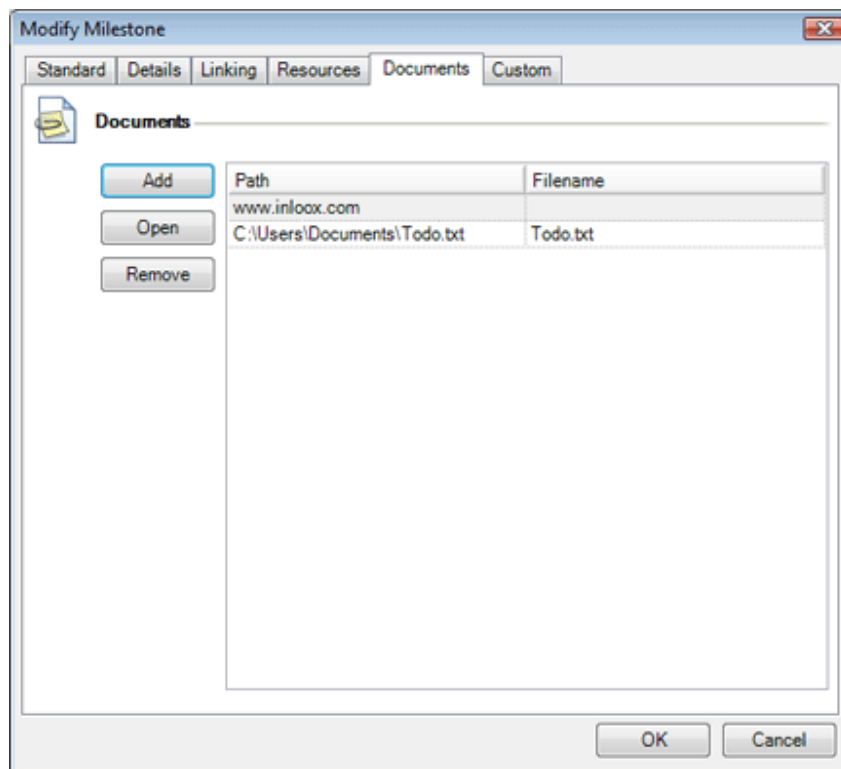
Element	Description
Successors (available)	Select a milestone or phase from this list and click on the button ">>". InLoox creates the chronological interdependency between the milestone and the selected successor
Successors (selected)	The list contains all successors of the milestone currently being edited. To remove a successor click on the button "<<". InLoox deletes the chronological interdependency between the milestone and the selected successor
 Note	InLoox checks the interdependencies and notifies any need to move the start or end of an element


The dialog box **New Milestone / Edit Milestone**: Resources tab

Element	Description
Add	<p>Opens the dialog box New Resource</p> <ol style="list-style-type: none"> 1. Click on the button "..." to select a contact. Select on or more contacts from the list and click on OK 2. Select the type of Notification. The notification determines when and how a contact or resource is to be informed. Select one of: (none), Email, Task request, Appointment request, InLoox Task 3. The State shows whether the resource concerned has already completed his/her tasks for this grouping
Edit	Changes the data of the selected resource
Remove	Removes the selected resource from the list
Workload	Opens the dialog box Resource Overview
Additional costs	Input an amount to include additional costs for your project plan. These include machine, material and other costs such as travel expenses. The Amount determines the planned time and costs in the Overview Area (column 3: planned costs other) on the Budget Page

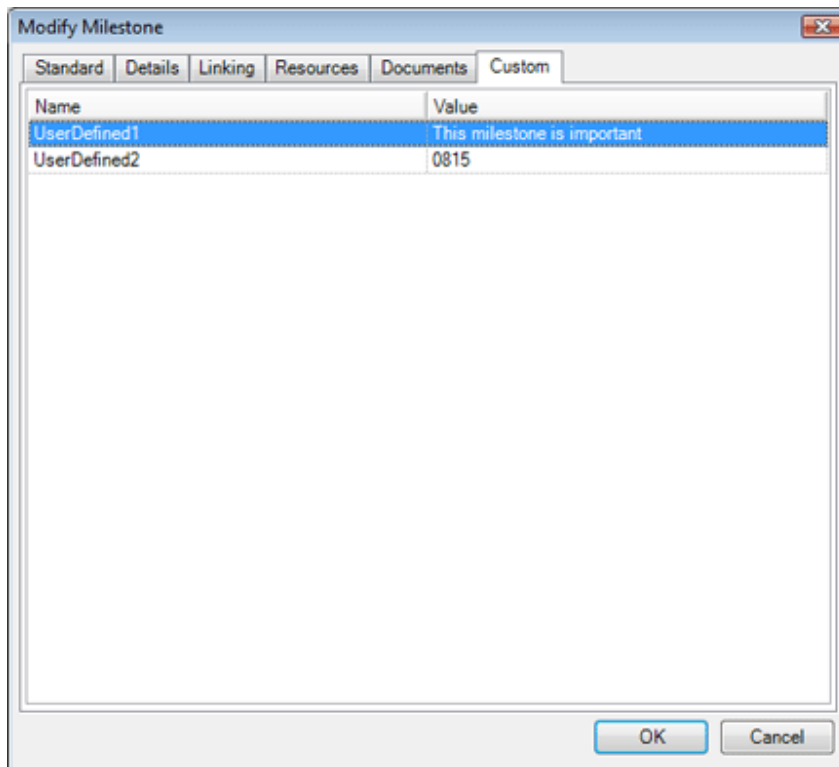
 **Hint:** More information on automatic **notification** can be found in the chapter on Message Types

The dialog box **New Milestone / Edit Milestone**: Documents tab



Element	Description
Add	Opens the dialog box Add Document . Select a document Type (file or internet link), enter a Path and click on OK
Open	Calls up the link or opens the file
Remove	Deletes the selected link from the list
List of documents	<p> Hint:</p> <ul style="list-style-type: none"> • A double-click calls up the link or opens the file • It is possible to link files on your local computer or on a server with the InLoox project plan. If you are a member of a team, specify the server path for the link to which all project team members have access

The dialog box **New Milestone / Edit Milestone**: Custom tab



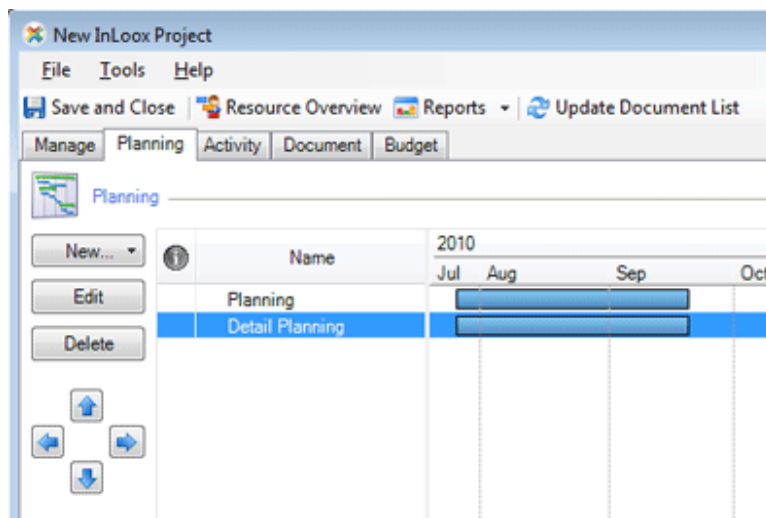
Element	Description
Custom fields	For inputting and displaying supplementary data such as billing information , technical abbreviations , work location , etc. New fields can be added using the dialog box Edit Custom Fields

PLANNING PAGE: CREATE GROUPING

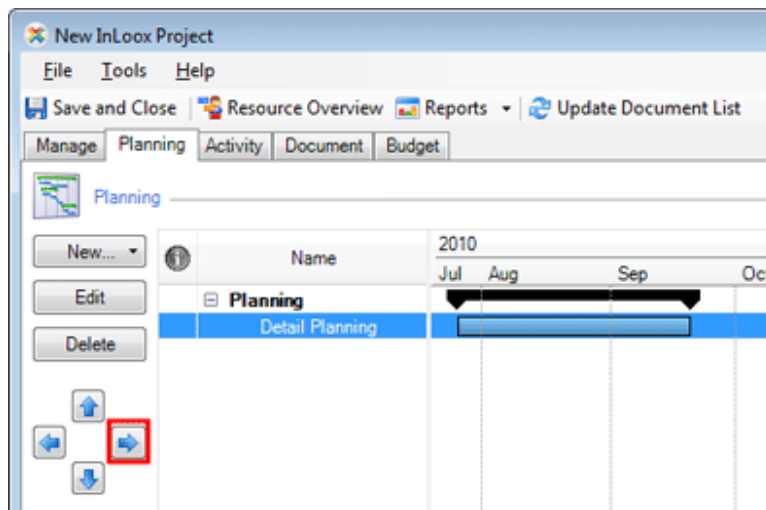
Detailed information on the **Planning** Page: Described here is the method for creating groupings and structuring planning elements

Concise instructions for creating a grouping

1. Open a project or create a new one
2. Create two phases one above the other, as shown:



3. **Flag** the lower one and click on the button **Group** (➡)
InLoox changes the upper phase to a grouping:



Notes


The phase which is to be changed to a grouping must not contain any **links** or **dependencies**

The **time period** for the grouping is automatically adjusted to take account of elements at lower levels

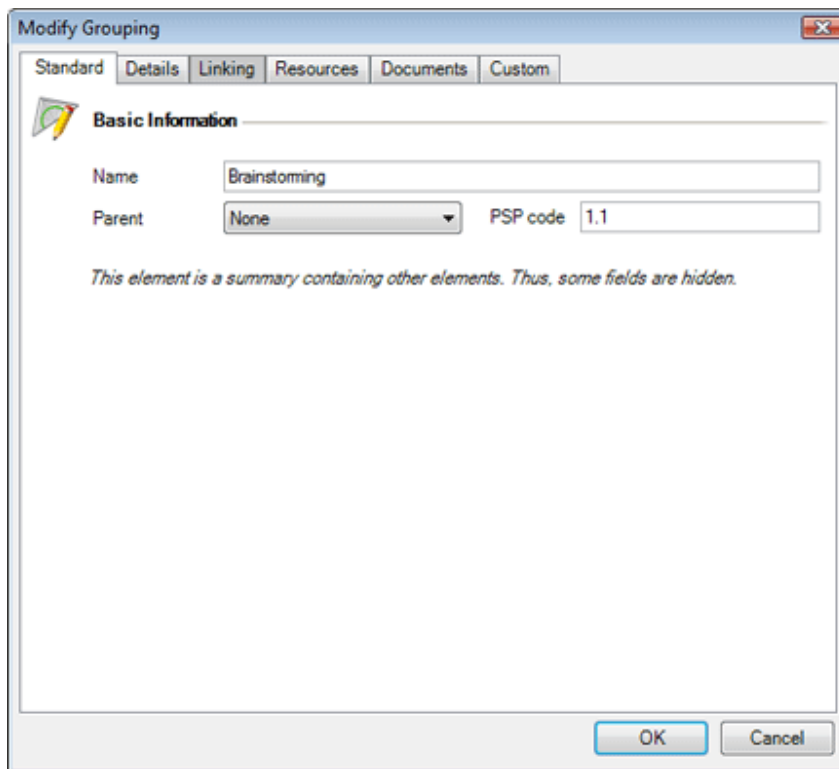
PLANNING PAGE: DIALOG BOX NEW GROUPING / EDIT GROUPING


Detailed information on the Planning Page: Described here is the method for creating a new grouping and modifying an existing one.

A grouping defines the structure of the project planning. There is the option of adding **notifications** to a grouping to inform team members, partners and customers. **Links** to documents, files and internet addresses can also be attached to a grouping.

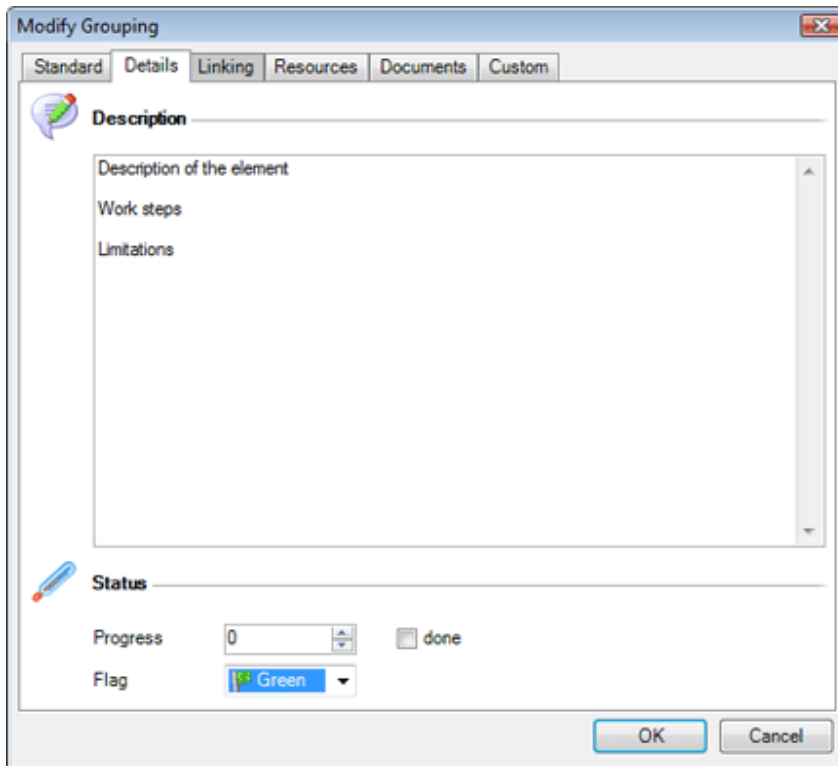
 Concise instructions for creating a grouping are available




The dialog box **New Grouping / Edit Grouping**: Standard tab



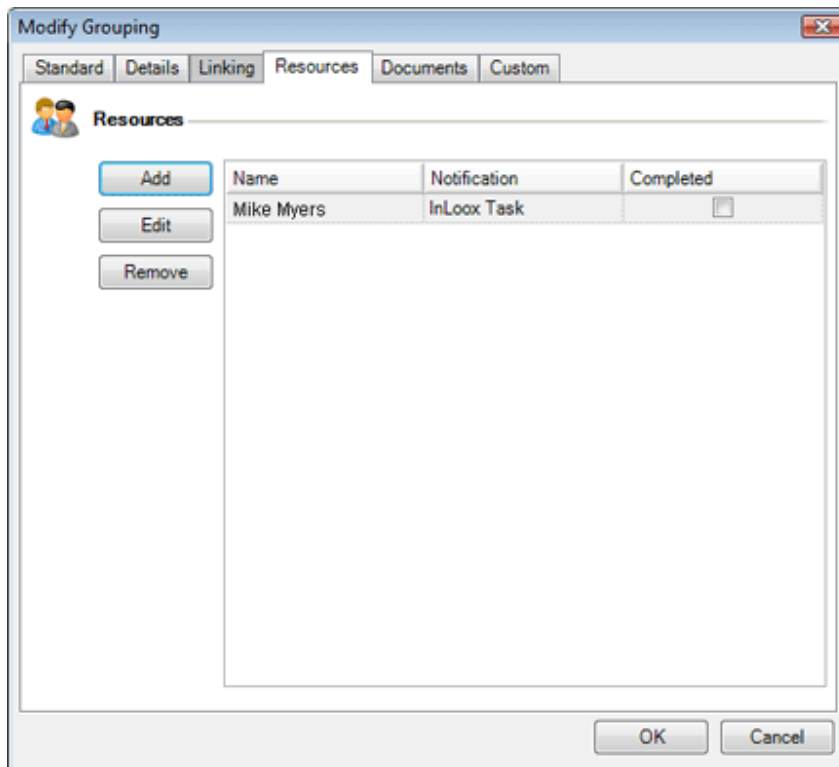
Element	Description
Name (*)	Description of the grouping, for example Conceptual design
Grouping	Existing grouping to which the current grouping belongs. InLoox supports hierarchies of any depth
PSP code	PSP code = Work Breakdown Structure code. Free text field for identifying phases and milestones in large projects.
 Note	(*) This field is a mandatory input when creating or modifying groupings

The dialog box **New Grouping / Edit Grouping**: Details tab



Element	Description
Description	Multiple-line free text field for activities and instructions concerning the grouping. Input here the required work results or internal remarks
Progress	Degree of completion of the grouping in percent (number between 0 and 100). InLoox calculates this automatically from the progress of all phases belonging to the grouping
Flag	Select a flag for the grouping (none,  ,  , ). The phase will be color-highlighted accordingly in the Gantt chart on the Planning Page

The dialog box **New Grouping / Edit Grouping**: Resources tab



Element	Description
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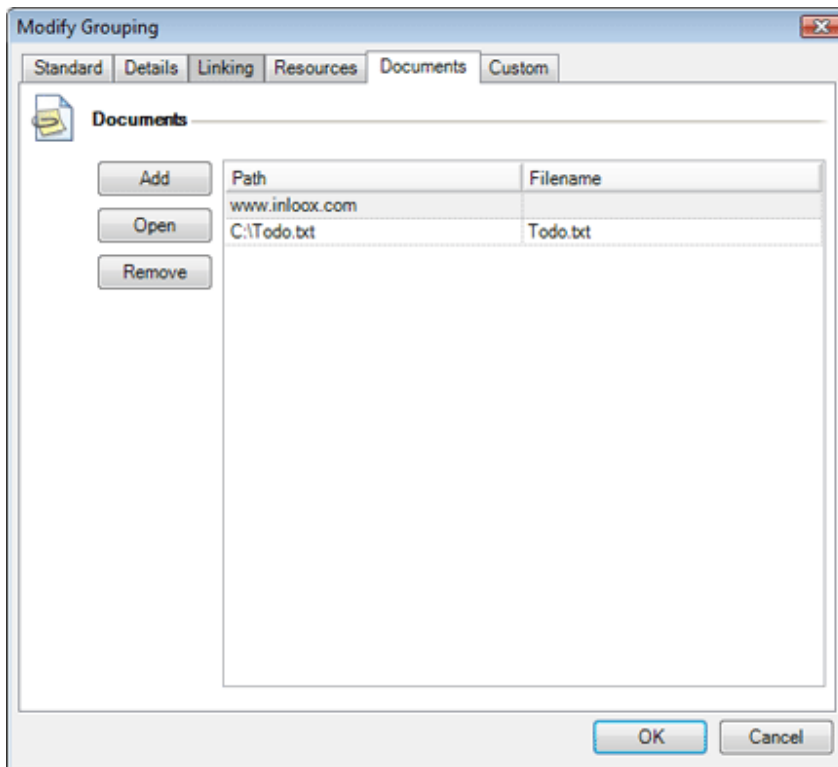
Add	<p>Opens the dialog box New Resource</p> <ol style="list-style-type: none"> 1. Click on the button "..." to select a contact. Select on or more contacts from the list and click on OK 2. Select the type of Notification. The notification determines when and how a contact or resource is to be informed. Select one of: (none), Email, Task request, Appointment request, InLoox Task 3. The State shows whether the resource concerned has already completed his/her tasks for this grouping
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Edit	Changes the data of the selected resource
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Remove	Removes the selected resource from the list
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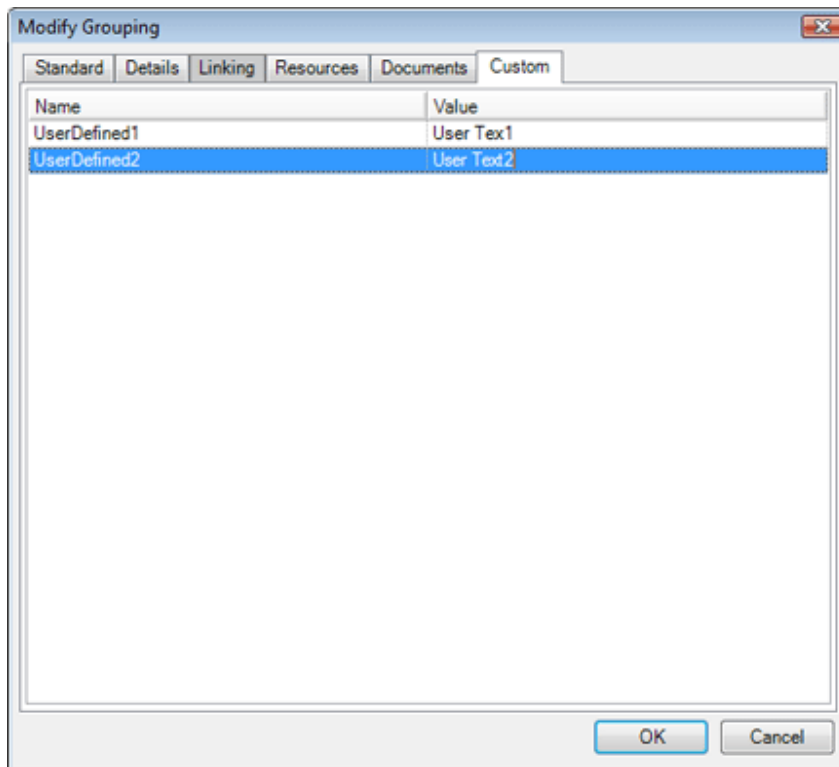
 **Hint:** More information on automatic **notification** can be found in the chapter on Message Types

The dialog box **New Grouping / Edit Grouping**: Documents tab



Element	Description
Add	Opens the dialog box Add Document. Select a document Type (file or internet link), enter a Path and click on OK
Open	Calls up the link or opens the file
Remove	Deletes the selected link from the list
List of documents	<p> Hint:</p> <ul style="list-style-type: none"> • A double-click calls up the link or opens the file • It is possible to link files on your local computer or on a server with the InLoox project plan. If you are a member of a team, specify the server path for the link to which all project team members have access

The dialog box **New Grouping / Edit Grouping**: Custom tab

**Element****Description****Custom fields**

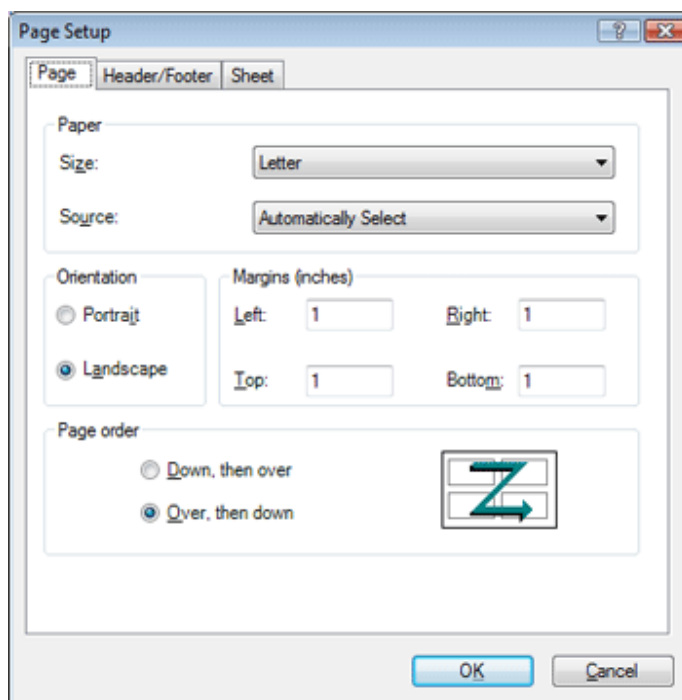
For inputting and displaying supplementary data such as **billing information**, **technical abbreviations**, **work location**, etc. New fields can be added using the dialog box **Edit Custom Fields**

PLANNING PAGE: DIALOG BOX PRINT

Detailed information on the Planning Page: Described here is the method for printing a Gantt chart with **Milestones**, **Phases** and **Groupings**.

Concise instructions for printing the Gantt chart

1. Open a project
2. Click on the button **Print** in the Planning Area (**Planning Page**)
*The dialog box **Print** is displayed*
3. Select a **printer** and set the **print parameters**
4. Click on **Print**
*The dialog box **Page Setup** is displayed:*



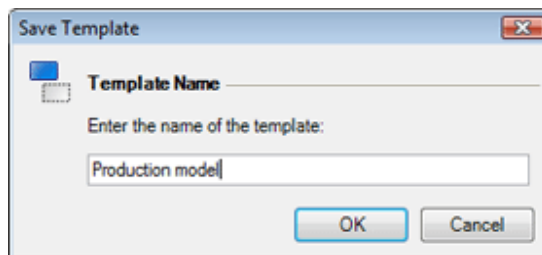
5. Select the orientation and page order under the **Page** tab
6. Select the header and footer lines under the **Header/Footer** tab
7. Select the print range, timeframe and scale (Fit to:) under the **Sheet** tab
8. Click on **OK**

PLANNING PAGE: DIALOG BOX SAVE TEMPLATE

Detailed information on the **Planning** Page: Described here is the method for saving the planning of a project to a new template

A brief summary of saving a template

1. Open a project
2. Click on the button **New >> Save template >> InLoox...** in the Planning area on the **Planning** Page
*The dialog box **Save Template** is displayed:*



3. Enter a **Name**
4. Click on **OK**

Notes

Templates of the following **Other formats** can also be saved: **Microsoft Project (MPP)**, **Microsoft Project Exchange (MPX)**. Use the menu item **New >> Save template >> Other format...**

All Phases, milestones and groupings of the current project are saved. InLoox also saves all **resources** with their **notification options**

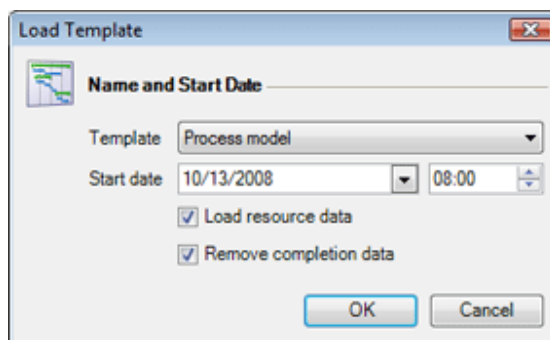
To modify a template, load it to a **dummy project**. Carry out the required changes and save the template anew. Planning templates can be deleted or renamed under the **InLoox Toolbar** (menu **Tools: Edit Planning Templates...**)

PLANNING PAGE: DIALOG BOX LOAD TEMPLATE

Detailed information on the **Planning** Page: Described here is the method for loading a planning template with milestones, phases and groupings to a project

A brief summary of loading a template

1. Open a project or create a new one
2. Click on the button **New >> Load template >> InLoox...** in the Planning area on the **Planning** Page
*The dialog box **Load Template** is displayed:*



3. Select a **Template**
4. Select a **Start date**
5. Specify whether the **resource data** of the template should be loaded
More information on resource data can be found in the chapter on Dialog box **Edit Phase**
6. Specify whether **completion data** should be removed from the **template**
In this case no progress information from the planning elements and resources are loaded from the template
7. Click on **OK**

Notes

The start date determines at what point in time the **first phase** or **milestone** from the selected template is to be set. All other elements are scheduled by InLoox based on this point in time


It is possible to load more **than one template** to a given project. It is also possible to load **more than copy of a template** to a project (also known as template duplication)

Templates of the following **Other formats** can also be loaded: **Microsoft Project (MPP)**, **Microsoft Project Exchange (MPX)**. Use the menu item **New >> Load template >> Other format...**

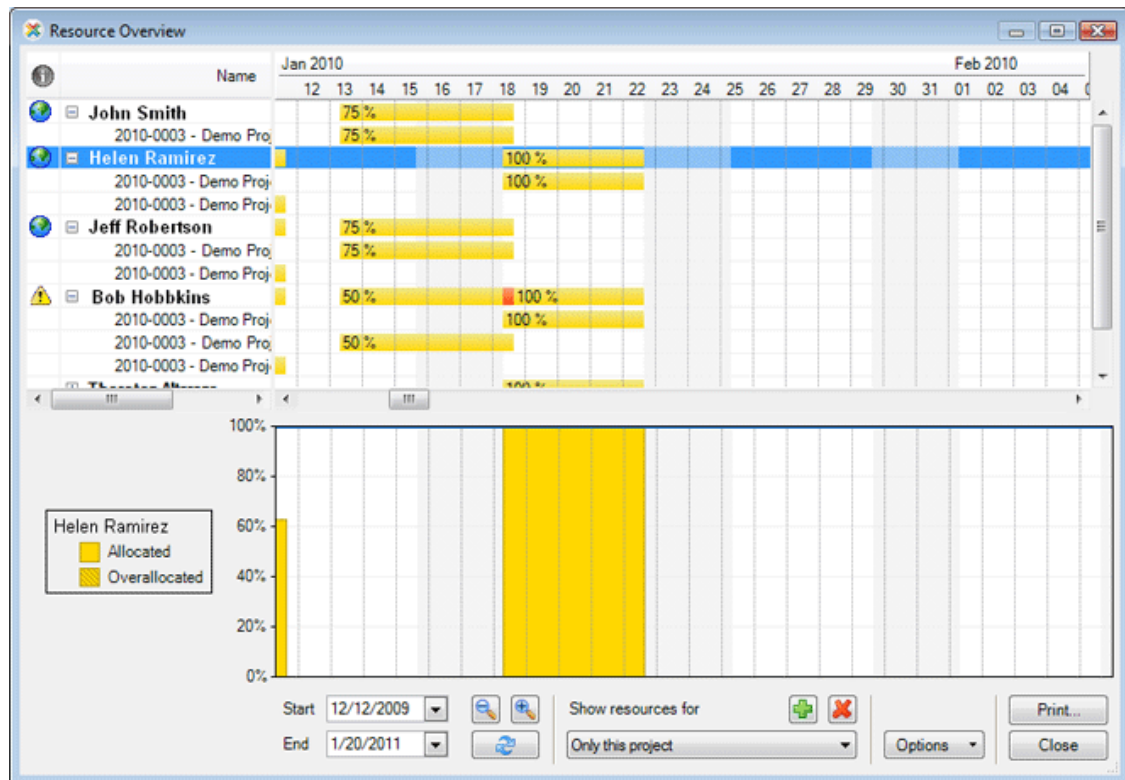
PLANNING PAGE: DIALOG BOX RESOURCE OVERVIEW


Detailed information on the **Planning** Page: The **Resource Overview** shows the resource workloads in graphical form



Resources are employees or objects used for work such as rooms, vehicles or machines. InLoox differentiates between internal resources (i.e. Exchange Server mailboxes) and external resources (i.e. email and fax contacts). InLoox uses the Free/Busy-Schedule of Microsoft Exchange Server for internal resources and integrates the information (**busy**, **tentative** and **out of office**) into the workload diagram. The diagram can be created for one project only or across many projects, according to the option selected

 A brief summary of creating a plan including resource allocation is available

The dialog box **Resource Overview**



Element	Description
Workload diagram	<ul style="list-style-type: none"> The view always filters the resources and workloads by the time period specified with Begin and End  Zoom by holding down the Ctrl key and scrolling with the mouse wheel Duration and degree of the workload are shown by the bars in the area at upper right:



- yellow bar (workload 1% - 100%)
- red bar (workload 101% - 149%)
- dark red bar (workload over 150%)
- In the example shown the overloading of the resource "Bob Hoppkins" results from the occupation in two phases. If appointments are on record in the Outlook calendar of an Exchange resource, the resource counts as fully loaded (100%) in the given time period. To hide the calendar deactivate the option display Exchange calendar
- Today's date is shown by a vertical **red** day line
-  shows that an **overbooking** of a resource has occurred in the given time period. The workload for the resource is more than 100% at some time. The alert symbol does not indicate the duration or degree of the overbooking
-  indicates an **external resource**. Information from the free/busy facility of the Exchange Server **cannot** be called up for **external resources**
- A click on the plus sign (+) beside a resource displays the workload details. These include the projects and phases to which the resource is assigned and, in the case of internal resources, also the Outlook calendar. The details of the resource can be hidden with the minus sign (-). A click on a phase centers the workload overview on it
- If the Resource overview is called up from within a project, phases from other projects are shown in grey
- Placing the mouse over a bar causes details to be displayed:

Brainstorming
 Start: 1/7/2010 8:00:00 AM
 End: 1/8/2010 4:00:00 PM Duration: 1 day 8h

The percentage indicates the **workload** of the resource. The time period and duration show the length of the workload
- A **click** on a resource displays a graphical overview of the workload data within the selected time period. These include the projects and phases to which the resource is assigned and, in the case of internal resources, also the Exchange calendar


Legend

Each workload is shown in the workload diagram as a **colored area**. InLoox marks these areas as follows:

-  indicates: **resource** is occupied (in project phase or Outlook calendar)
-  indicates: **resource overloaded** (total workload **over** 100 %)
- an **empty field** indicates: the resource is **free** during the corresponding time period *or* **no occupation data** are available

Start / End

Specifies the time period for which the resource workload is to be determined

 Note: All resources which are not occupied during the specified time period are hidden. Use the button Add resource (+) to always display resources with whom/which you often work, regardless of the dates specified

Zoom ()

Changes the view of the workload diagram. Possible values:

- Years
- Quarters
- Months
- Weeks
- Days
- Hours
- Quarter-hours
- Minutes

Refresh ()


Reloads the view. All information is refreshed

Filter


Specifies which resources are to be included in the overview. Possible values:

- All projects (= no filter)
- This project only (= filter is current project)
- This phase only (= filter is current phase)


 Note: Use the button Add resource () to always display resources with whom/which you often work, regardless of the dates specified

Add resource ()

Opens a dialog box for resource selection. Use this button to always display resources with whom/which you often work, regardless of the filters specified

Delete resource ()

Removes the selected resource from the view. Use this button to always hide resources regardless of the filters specified. The is stored for each user and therefore does not affect the resource overview of other users

 Note: Click with the right-hand mouse button on the resource list at upper left. Select the menu command Display deleted resource(s) to reintroduce all resources previously deleted

Options

A click on the button **Option** opens a menu with the following commands:

- Display Exchange calendar: Displays or hides the data from the Free/Busy-Schedule of an Exchange Server. When activated InLoox takes account of the calendar data when calculating the workload
- Display descriptions: Displays the descriptions of the work packages at upper right
- Include all projects in overview: If this option is active the resource overview also includes phases from other projects. This option is only available when the resource overview is called up from within a project

Print

Prints the resource overview. Clicking on this button causes the dialog box **Print**



to be displayed

Close

Closes the dialog box

Context menu of the resource list

The following menu commands are available:

- **Reload Overview** () , Delete resource ()
- Expand all groups / Collapse all groups: Changes the resource view and hides or displays the workload details for all resources
- Display Exchange calendar
- Display descriptions

 Notes

Information from the Free/Busy-Schedule feature of Microsoft Exchange Server **cannot** be called up:

- at any time for **external resources**
- in offline mode for **internal resources**

Activities Page

ACTIVITY PAGE

The **Activity** Page contains all activities performed, work carried out and events recorded for a project. You can link activities and documents to improve transparency





Information on the **Activity**Page:

- **Details** of the page areas: Activities
- **Concise instructions** are available: Record activity or document
- Description of the **dialog boxes**: New Activity / Edit Activity

ACTIVITY PAGE: ACTIVITIES AREA


Detailed information on the **Activity** Page: elements, features and descriptions

The **Activities** area:

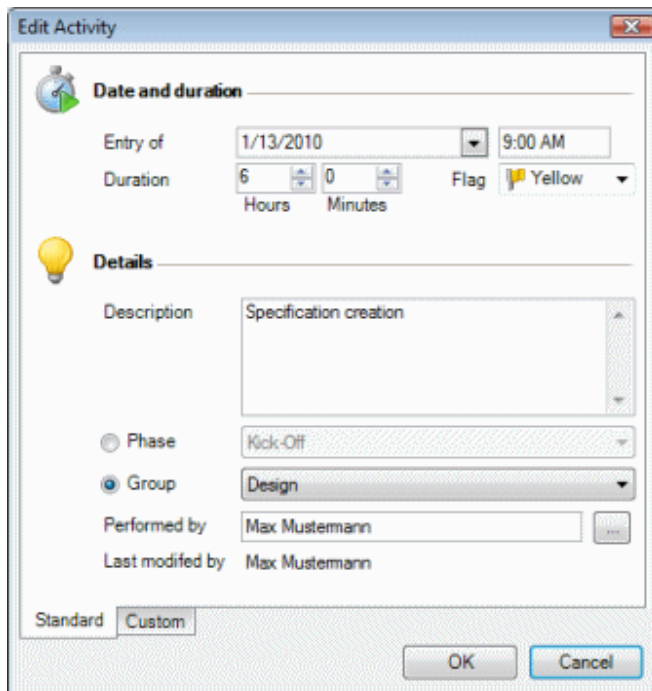
Element	Description
New	Creates a new entry in the list of activities. Permission is required. Clicking on the button causes the dialog box New Activity to be displayed
Edit	Changes the selected entry in the list of activities. Permission is required. Clicking on the button causes the dialog box Edit Activity to be displayed
Delete	Deletes the selected entry from the list of activities. Permission is required
Report...	Copies the contents of the list of activities into a report. The report templates can be customized. Permission is required. Details can be found under Customizing Report Templates
Print...	Starts the quick print feature of the list of activities
List of activities	<ul style="list-style-type: none"> • An entry contains the following data: Description, Flag, Start, End, Duration, Group, Phase, Performed by, Modified by, Link indicator • Each entry carries a flag (none, , , ) • A paper clip () shows that one or more documents are link to the activity. A click on the paper clip and then on the button "... " opens a menu with the linked documents • The total duration of all entries is displayed • The list is sorted by date in descending sequence and can be grouped and sorted just like an Outlook list • A popup menu is displayed on clicking with the right-hand mouse button. The following commands are available: New..., Edit..., Delete, change the view (Choose fields) and Create reminder for the activity in the Outlook calendar • A padlock symbol displayed in the list shows that you have no read permission. In this case no activities will be displayed




ACTIVITY PAGE: DIALOG BOX NEW ACTIVITY / EDIT ACTIVITY


Detailed information on the **Activity** Page: Described here is the method for creating a new activity or edit an existing one. An activity is a part of a project used by InLoox as documentation and for recording work done and time spent

 Concise instructions for Creating an activity are available

The dialog box **New Activity / Edit Activity**:



Element	Description
Entry of (*)	Day and time on which the activity was created. When creating a new activity today's date and the current time of day are proposed and can be changed
Duration (*)	Duration of the activity. Enter the time required in the format hh:mm (hours and minutes each with two digits)
Flag	Select a flag for the activity (none,  ,  , )
Description	Multiple-line free text for documenting significant facts about the activity. Typical data are Location, names of persons involved, results of meeting or internal remarks
Phase (*)	Phase or milestone to which the activity belongs. Phases and milestones can be created on the Planning Page
Group (*)	Group to which the activity belongs. The group is a sort criterion or a project cost center

Performed by (*)	Name of the person who has carried out the activity
Last modified by	Name of the person who created the activity or last edited it
"Custom" page	Used to input and display supplementary information such as Billing information, technical abbreviations, Document category etc. New fields can be added as described under Edit Custom Fields
 Notes	(*) These fields are mandatory inputs when creating and editing activities Each group has an internal and an external price. The prices and the available groups can be customized under InLoox Options

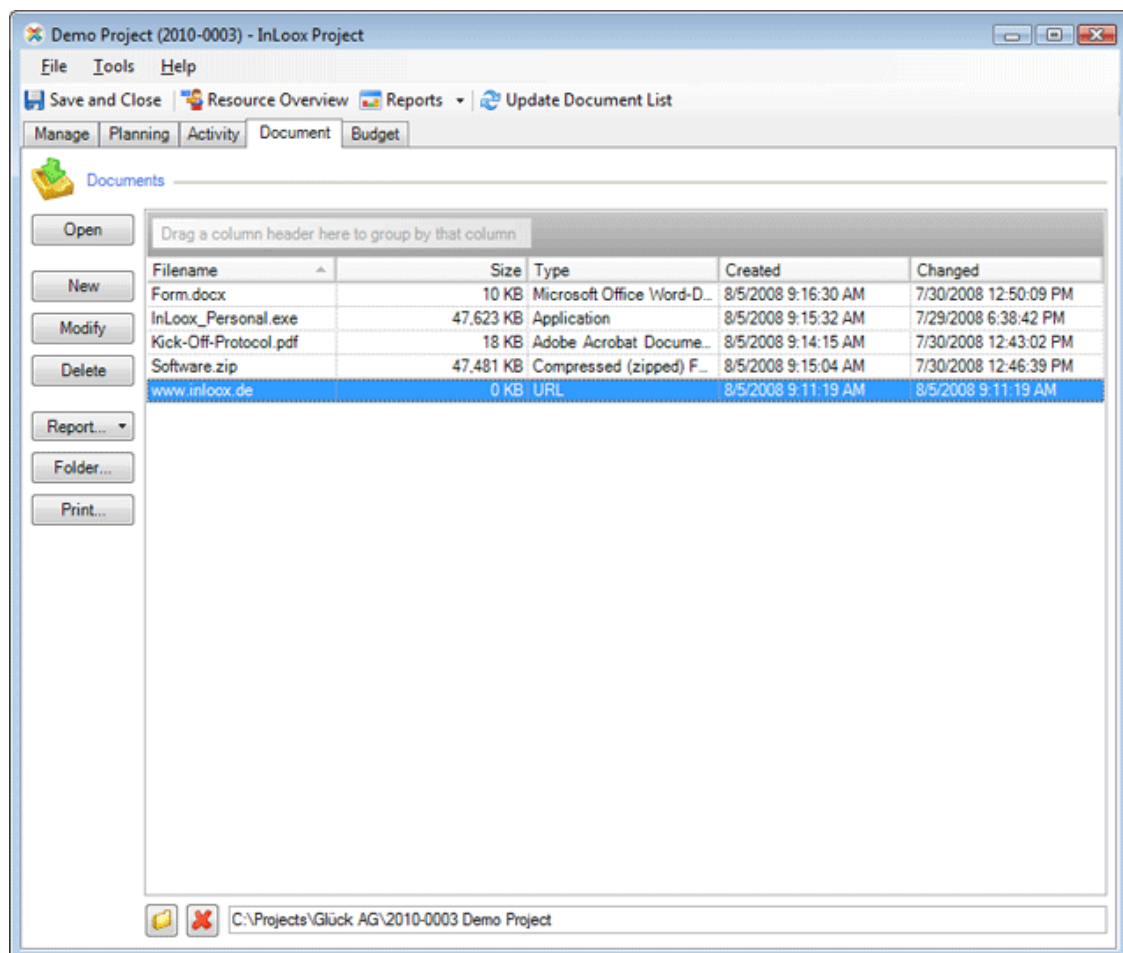
Documents Page

DOCUMENT PAGE

The **Document** Page provides a straightforward project document management facility under Outlook. Windows files, folders, Outlook elements and Internet links can be filed separately for each project and called up at any time. InLoox employs links internally to save storage space and avoid duplicates and is able to access **SharePoint portal server document libraries**. Details can be found in the chapter on Document Management Technology

Information on the **Document Page**:

- **Details** of the page areas: Documents, files & links
- **Brief summaries** are available: Saving files and documents, Attachment Management
- Description of the **dialog boxes**: New Document / Edit Document, Select Document Folder



DOCUMENT PAGE: TECHNOLOGY

Detailed information on the Document Page: The InLoox document storage and management technology is based on intelligent links within Microsoft Outlook, Microsoft Windows and Microsoft SharePoint Server. The advantages of this method are:

1. Virtually no additional storage space required, keeping InLoox projects lean
2. File rights are inherited. If for example you add a file from a protected network folder or SharePoint store to the InLoox storage, the file can still only be read and updated by authorized users - at no additional cost
3. Backup and existing version and document management applications can still be used




Notes:

- InLoox is able to arrange documents automatically if required. The base folder to be used by InLoox for this purpose can be defined under **InLoox Options**
- Details of the Document types supported by InLoox

DOCUMENT PAGE: DOCUMENT TYPES


Detailed information on the Document Page: InLoox supports the following document types:

Document Types	Examples
Outlook elements	<ul style="list-style-type: none"> • Emails (Inbox, Outbox, Sent, Archive) • Contacts • Tasks • Journal entries • Calendar entries • with or without file attachments <p> Details can be found in the chapter on Attachment Management</p>
Files	<p>all Windows-readable files</p>
Links, Internet links	<ul style="list-style-type: none"> • www.inloox.com • www.exchange-server.com/inbox/mail-inloox.htm • C:\link to Desktop.lnk • Z:\ (complete network drive)
SharePoint elements	<ul style="list-style-type: none"> • compatible with SharePoint Portal Server 2003 and SharePoint Server 2007 • Sites that support document libraries • Folders and subfolders • File objects

DOCUMENT PAGE: DOCUMENT LIST AREA

Detailed information on the **Document** Page: elements, features and descriptions.

The **Document** Area:

Element	Description
Open	<p>Opens the selected document or starts the relevant application, e.g. Adobe Acrobat</p> <p> Note: Permission is required. Details can be found in the chapter on Document Management Technology</p>
New	<p>Creates a new entry in the document list. Permission is required. Clicking on this button causes the dialog box New Document to be displayed</p>
Edit	<p>Changes the selected entry in the document list. Permission is required. Clicking on this button causes the dialog box Edit Document to be displayed</p>
Delete	<p>Removes the selected document from the list. Permission is required. The document itself can also be deleted. If you want to delete the document physically answer the security query: "Do you really wish to delete the selected document from the project folder? This action cannot be reversed" with Yes</p>
Report...	<p>Copies the contents of the document list into a report. The report templates can be customized. Permission is required. Details can be found under Customizing Report Templates</p>
Folder...	<p>Opens the document folder in Windows Explorer or the web browser (in the case of a SharePoint document library)</p>
Print...	<p>Starts the quick print feature of the document list</p>
Document List	<ul style="list-style-type: none"> • An entry contains the following data: filename, size, type, state, note, created on, changed on, folder, path. If the element was added to the project using the button Add element, the following is also included: Outlook sender, Outlook topic, Outlook received on. If the project document folder is a SharePoint document library, the following is also included: SharePoint author, SharePoint operator, SharePoint document library, SharePoint site, SharePoint subfolder • The list can be sorted and grouped just like any Outlook list • Documents can be added to the list via Drag and Drop. Documents are copied to the same time to project folder automatically. If the keys Ctrl and Shift are held down during drag and drop, the documents are not copied to the project folder, but merely linked from their original location • The documents can be updated by using the toolbar button Update Document List. The documents are updated automatically every time a project is opened, provided that the corresponding option has been activated in the InLoox Options • A click with the right-hand mouse button causes a context menu to be displayed. The following commands are available: Open, New..., Edit..., Delete, Refresh file list, change the view (Choose Fields)

and **Properties** of the file concerned

- A padlock symbol shows that you have no read permission. In this case no documents will be displayed

Folder... button

Changes the **document folder**. The dialog box Select document folder is displayed. Please note that with a change of folder the existing documents remain where they were

Delete button

Restores the **document folder**. InLoox selects the **document folder** anew according to the **document folder rule** as soon as a new document is added to the project

Document folder

In new projects no **document folder** is defined. When documents are added for the first time, InLoox will create the **document folder** according to the **document folder rule**. This can be customized under **InLoox Options**

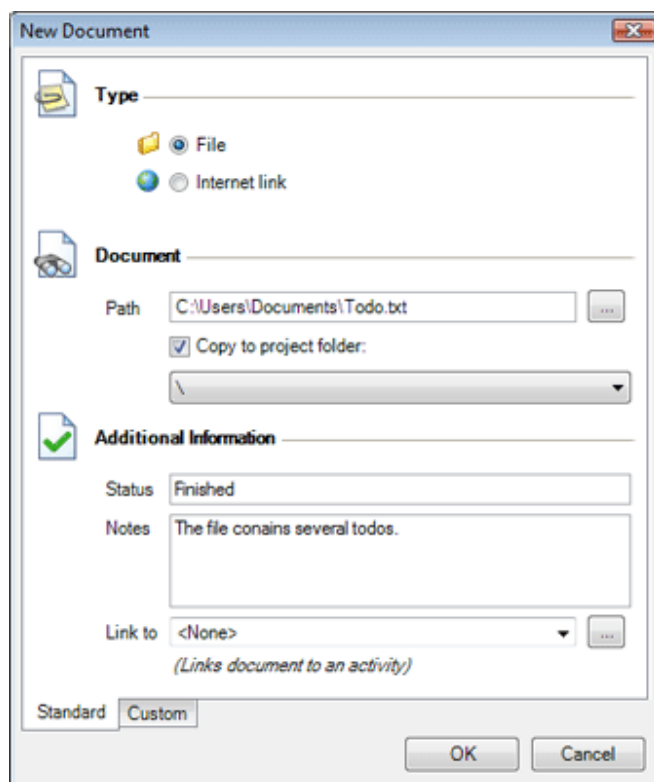
DOCUMENT PAGE: DIALOG BOX NEW DOCUMENT / EDIT DOCUMENT

Detailed information on the **Document** Page: Described here is the method for adding a new document to the list or modifying an entry in the document list. A document is a part of a project and is, according to **type**, an *Outlook element* (e.g. an email), a *File* (e.g. PDF, Word, Excel or AutoCAD) or an *Internet link*. Details can be found in the chapter on Document Management Technology




A brief summary of Storing Files and Documents is available

The dialog box **New Document / Edit Document**:



Element	Description
Type (*)	Select the type of document: <ul style="list-style-type: none"> • File (Office, PDF, ZIP, AutoCAD etc.) • Internet link, e.g. www.inloox.com
Path (*)	Specify here the location of the document. A click on the button "... " opens a dialog box for Browsing
Copy to project folder:	Specify here whether the document is to be copied into the project document folder . More information can be found in the chapter on Document List

Subfolder selection list	Select a subfolder into which the document is to be copied
State	Change instructions, e.g. release or completed
Note	Multiple-line text field for notes and comments
Link to	Permits a document to be linked to an activity. The document is then displayed in the Activities area on the Activity page with a paper clip () and can also be called up from there. A click on the button "... " opens a dialog box for selecting an activity



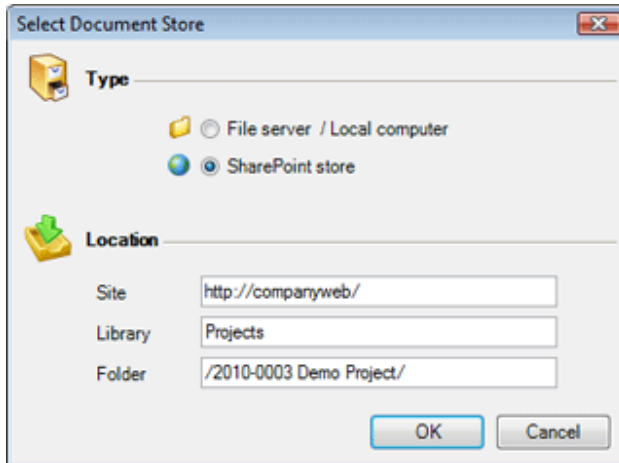
Note

(*) These fields are **mandatory inputs** when creating or modifying document list entries

DOCUMENT PAGE: DIALOG BOX SELECT DOCUMENT FOLDER

Detailed information on the Document Page: Described here is the method for changing the document folder of a project. Please note that when changing then folder the existing documents remain where they are.

The dialog box **Select document folder**:



Element	Description
Document storage type	Select a type of document storage: <ul style="list-style-type: none"> • File server or local computer (storage in file system) • SharePoint portal server (storage in a SharePoint document library)
Storage location	Specify, according to document storage type: <ul style="list-style-type: none"> • Path if a file server or local computer was selected as document storage type. A click on the button "..." opens a dialog box for a browsing • Site, library and folder (optional) if a SharePoint portal server was selected as document storage type.

Budget Page

BUDGET PAGE

The Budget Page provides an overview of available budgets of the project based on costs, calculations and invoices. New budget documents can be created in InLoox and exported to **Microsoft Excel**, **Microsoft Word** or as a **PDF file**. It is possible to monitor the state and manage individual assets directly from Outlook.

Information on the **Budget Page**:

- **Details** of the page areas budget list (at left), asset list (at right), budget overview (at bottom)
- **Brief summaries** are available on Creating a budget, Creating an invoice, Project controlling
- Description of **dialog boxes** New Budget / Edit Budget, New Asset / Edit Asset

The screenshot shows the InLoox Budget Page interface. The window title is "Demo Project (2010-0003) - InLoox Project". The menu bar includes "File", "Tools", and "Help". The toolbar contains "Save and Close", "Resource Overview", "Reports", and "Update Document List". The main area is divided into three sections:

- Budgets:** A table with columns "Type", "Amount", "Type", and "Name". It lists "Activity..." (1,440.0), "Expens..." (10,000), and "Invoices" (2,100.0).
- Asset List:** A table with columns "Quantity", "Unit", "Price per unit", "Amount", and "Billed". It lists items like "2.00 hours" (40.00 \$, 80.00 \$), "5.00 hours" (40.00 \$, 200.00 \$), and "20.00 hours" (40.00 \$, 800.00 \$).
- Budget Overview:** A summary table comparing Target and Actual values for various groups.

Group	Target				Actual				Profit diff.	S
	Planned c.	Planned.	Planned r.	Planned p.	Activity co.	Other cos.	Revenues	Profit		
Consulting	0.00 \$	0.00 \$	0.00 \$	0.00 \$	320.00 \$	10,000.00	420.00 \$	-9,900.00 \$	-9,900.00 \$	🔴
Production	0.00 \$	0.00 \$	0.00 \$	0.00 \$	880.00 \$	0.00 \$	1,320.00 \$	440.00 \$	440.00 \$	🟢
Maintena...	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	🟢
Design	10,960.00	0.00 \$	0.00 \$	-10,960.0	240.00 \$	0.00 \$	360.00 \$	120.00 \$	11,080.00	🟢
Total	10,960.00	0.00 \$	0.00 \$	-10,960.0	1,440.00 \$	10,000.00	2,100.00 \$	-9,340.00 \$	1,620.00 \$	🟢

BUDGET PAGE: BUDGETS AREA


Detailed information on the **Budget Page**: elements, features and descriptions.

The **Budgets Area** within the Budget Page (at left):

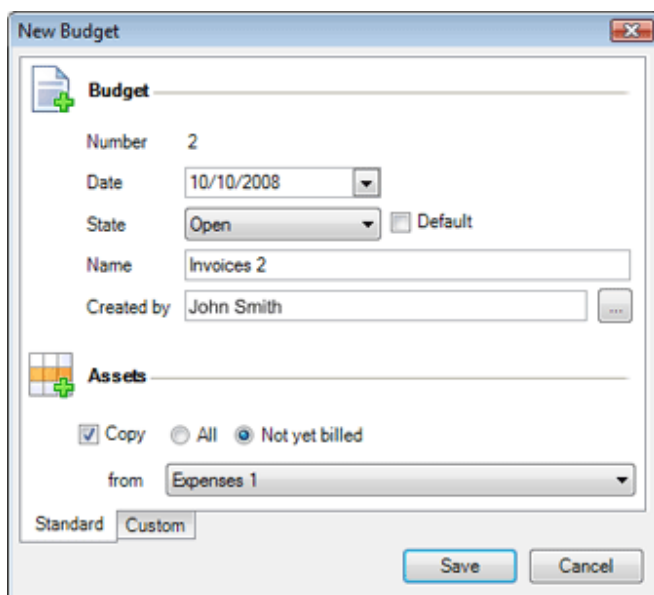
Element	Description
New	<p>Creates a new entry in the list of budgets (at left). Permission is required. Clicking on this button causes a menu of available budget types to be displayed (expenses, calculations, invoices). Select a budget type. The dialog box New Budget is displayed</p> <p>Note: The budget type governs the placing of the budget in the Budget Overview</p>
Edit	<p>Changes the selected entry in the list of budgets. Permission is required. Clicking on this button causes the dialog box Edit Budget to be displayed</p>
Delete	<p>Deletes the selected entry from the list of budgets. Permission is required</p>
Report...	<p>Copies the contents of the selected budget to a report. The report templates can be customized. Permission is required. Details can be found under Customizing report templates</p>
Print...	<p>Starts the quick print feature of the list of budgets, budget assets or the Budget Overview</p>
List of Budgets	<ul style="list-style-type: none"> • An entry contains the following data: Type (expenses, calculations, invoice), Sequence number, Date, State, Name, Amount, Created by, Created on, Changed by, Changed by • Each entry has a unique number • Each entry has a state, which is freely definable. More information can be found in the chapter on Edit budget states • The Total amount of all Assets included in the budget is displayed. In the case of budgets of type <i>Calculations</i> und <i>Expenses</i>, the proportion of assets sofar billed by <i>Invoice</i> is also displayed • The list is sorted by date in descending order and can be grouped or sorted in the same way as an Outlook list • The first entry in the list is generated automatically. This budget (titled "Activity Costs") contains all activities of the project as assets. It cannot be changed manually • A popup menu is displayed by clicking with the right-hand mouse button. Available commands are New, Edit... and Delete; Create invoice (for expenses and calculations only); State, to alter the state of the budget and Choose fields to customize the view • A padlock symbol displayed in the list indicates that you have no read permission. In this case no budgets can be viewed

BUDGET PAGE: DIALOG BOX NEW BUDGET / EDIT BUDGET

Detailed information on the **Budget** Page: Described here is the method for creating a new budget document or editing an existing one. A budget is part of a project and can refer to *expenses*, *calculations* or an *invoice*, depending on the **Type**. A budget has a state and usually contains assets

 Brief summaries of how to create a budget and create an invoice are available

The dialog box **New Budget / Edit Budget**:



Element	Description
Number	A unique budget number, formed from the type and a sequence number . The number cannot afterwards be changed and is not re-issued after the budget is deleted
Date (*)	Day on which the budget was created. When creating a new budget, today's date is always proposed but can be overwritten
State (*)	Select a state for the activity (open , accepted , rejected). Use open for example for offers not followed with an order or unpaid invoices If the parameter Standard , is selected, the current state will be applied as standard to all new projects from then on State is freely definable. More information can be found in the chapter on Editing Budget States
Name	Budget name. Any text can be used; the standard option, depending on type, is Costs/Calculations/Invoice and is proposed automatically but can be changed. Use a unique name to make it easier for you and your customer to assign a budget unambiguously outside of InLoox.
Created by (*)	Name or person creating the budget

Copy asset

It is possible to copy assets from one existing budget document to another. This is particularly useful for the following:

- Transfer an asset from a rejected calculation to a new one and subsequently edit or delete it
- Bill assets from a budget of type Costs or Calculation with InLoox directly. Please refer to the Brief Summary of Billing

Concise instruction for Adding Assets are available

"Custom" Page

Used to input and display supplementary information such as **Billing information, technical abbreviations, Document category** etc. New fields can be added as described under **Edit Custom Fields**









(*) These fields are **mandatory inputs** when creating and editing budgets

BUDGET PAGE: ASSET LIST AREA


Detailed information on the **Budget** Page: elements, features and descriptions.

The **Asset List Area** within the Budget Page area (at right):

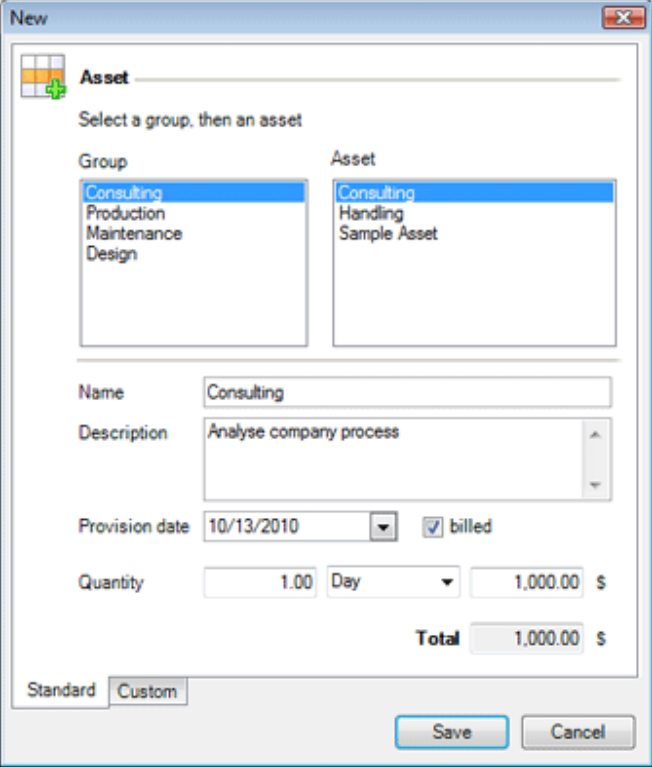
Element / Action	Description
Double-click on empty field or symbol 	Creates a new entry in the Asset list (at right). Permission is required. A click on this button causes the dialog box New Asset to be displayed
Double-click on an entry	Changes the selected entry in the asset list. Permission is required. A click on this button causes the dialog box Edit Asset to be displayed
Key or symbol 	Deletes the selected asset from the list. Permission is required
Symbol 	Moves the selected asset towards the top of the list. Permission is required
Symbol 	Moves the selected asset towards the bottom of the list. Permission is required
List of assets	<ul style="list-style-type: none"> • An entry contains then following data: Sequence number, Description, Group, Amount, Quantity, Unit, Unit price, Unit selling price (optional for budget types Calculations and Expenses), Billed (optional for budget types Calculations and Expenses), Line item number, Created by, Created on, Changed by, Changed on, Carried out on (with activity costs this is the start date of the activity) • Each entry has a unique number • Entries in the list are sorted in descending order of creation and can be custom sorted manually (using the buttons  and ) and grouped the same way as an Outlook list • The Total amount of all entries is displayed if the list is grouped by a specific column • A popup menu is displayed by clicking with the right-hand mouse button. Available commands are New, Edit... and Delete; Asset(s) billed and Choose fields to customize the view



BUDGET PAGE: DIALOG BOX NEW ASSET / EDIT ASSET


Detailed information on the **Budget** Page: Described here is the method for creating an asset or editing an existing one. Assets are included in a budget. Assets included in a budget document of type *Costs* or *Calculations* can be either **billed** or not.

 A brief summary on the creation of a budget including assets is available

The dialog box **New Asset / Edit Asset**:




Element	Description
Group (*)	Select from the list a group to which the asset belongs. The group defines the structuring of assets within the system  Note: The groups can be customized under InLoox Options
Asset	Select the required asset from the list. If such an asset is not on file, it can be input manually  Note: The dialog box Edit Budget can be used to create new asset templates or customize existing ones
Name	Short asset name. Can be changed


Description (*)	Multiple-line description of the asset. Can be changed
Provision date	Date of carrying out or delivery. With activity costs this is set automatically to the start date of the activity
billed	Only for asses from budgets of type <i>Costs</i> or <i>Calculations</i> . This is set automatically once the asset (or the entire document) has been billed A click on the parameter sets this state manually
Quantity (*)	Input the quantity of the selected unit, e.g. 95 or 2.34 . A credit can be recorded by inputting a negative figure
Unit price, Unit (*)	The selected Unit is linked to the unit price . Select a unit if there is more than one or change the unit price manually All prices are excluding VAT because in InLoox only records net amounts. The VAT can be expressed separately in the report templates
Total (*)	Asset amount ("Price per unit multiplied by quantity")
"Custom" Page	Used to input and display supplementary information such as Billing information, technical abbreviations, Document category etc. New fields can be added as described under Edit Custom Fields
 Note	(*) These fields are mandatory inputs when creating and editing assets Each group has an internal and an external price. The prices and the available groups can be customized under InLoox Options

BUDGET PAGE: OVERVIEW AREA

Detailed information on the **Budget Page**: elements, features and descriptions.

The Overview Area gives an ongoing comparison between the amounts in **Manage**, **Planning**, and **Budget**. A list of all amounts, cumulated by group, is displayed:

Element	Description
1st Column Group	<p>One line is generated for each group</p> <p> Notes:</p> <ul style="list-style-type: none"> • Amounts on columns 2-10 are cumulated by group • The line Amount shows the totals from each column • An internal price per hour is recorded for each Group. The internal prices per hour and the available groups can be customized under InLoox Options
2nd Column Planned costs (Resources)	<p>Costs of all phases from the Planning Page, for which resources were recorded with time spent.</p> <p>Method: For each phase the time spent of all Resources is multiplied by the Group Purchasing Costs. All phase costs are cumulated by group</p>
3rd Column Planned costs (other)	<p>Costs of all phases from the Planning Page, for which Additional Costs were recorded. Examples of these are machine or material costs or travel expenses.</p> <p>Method: Additional Costs for all phases are cumulated by group</p>
4th Column Planned revenues	<p>All Calculations from the Budget Page</p> <p>Method: Budget documents of type Calculations are totaled and/or cumulated by group</p>
5th Column Planned profit	<p>Variance between planned revenues and planned costs (Planned costs - resources) and Planned costs - other)</p> <p>Method: 5th Column minus (2nd Column plus 3rd Column)</p>
6th Column Activity costs	<p>Activity Costs from the Budget Page</p> <p>Method: Activity Costs are calculated automatically: Activities from the Manage Page multiplied by the Group Purchasing Costs cumulated by group</p>
7th Column Other costs	<p>Costs from the Budget Page (other than activity costs)</p> <p>Method: Budget documents of type Costs are totaled and/or cumulated by group</p>
8th Column Revenues	<p>Invoices from the Budget Page</p> <p>Method: Budget documents of type Invoice are totaled and/or cumulated by group</p>
9th Column	<p>Difference between revenues and actual costs (Activity costs and Other)</p>

Profit	costs) Method: 8th Column minus (6th Column plus 7th Column)
10th Column Profit difference	Difference between profit and planned profit Method: 9th Column minus 5th Column
State	A negative amount in the 10th Column (Debit/Credit) is marked with a red dot (●). In this the actual profit is lower than the planned profit. Depending on the project objective, this can mean one of the following: <ul style="list-style-type: none">• Costs exceed revenues• Revenues are lower than anticipated• Costs are higher than anticipated
 Hint	It is possible to display the total costs, revenues, profit and cost overruns in the InLoox Project Overview . More information can be found in the chapter on Customizing Personalized Views

MENU AND TOOLBAR IN THE INLOOX PROJECT

The **InLoox Project** contains menus and toolbars. A description of all commands and buttons can be found here.

The Menus:

Menu	Menu item	Description
File	New	Creates a new project
	Save	Saves the current project
	Import	Reads in data in the following formats: Microsoft Project (MPP) , Microsoft Project Exchange (MPX) . The data is displayed on the Project Planning Page
	Export	Writes out data from the Project Planning Page in the following formats: Microsoft Project Exchange (MPX) , Extensible Markup (XML)
	Close	Closes the project window
Tools	Reports	Report generator. More information can be found in the chapter on Creating and Editing Reports
	Saved reports	List of saved reports. More information can be found in the chapter on Saving Reports
	Resource overview	Calls up the Resource Overview
	Update Document List	Updates the document list from the Project Document Page
	Categories	Calls up the dialog box Categories from the Project >Manage Page
?	InLoox Help	Calls up InLoox online documentation
	InLoox Online	Opens the InLoox website
	Ideas and suggestions	Opens the feedback form
	Report an error	Opens the Support Center
	About InLoox	Opens a window with your InLoox version number

The toolbar:

Button	Description
Save and close	Saves the data from the current project and closes the project window

Resources Overview

Calls up the **Resource Overview**

Reports

Report generator. More information can be found in the chapter on Creating and Editing Reports

Update Document List

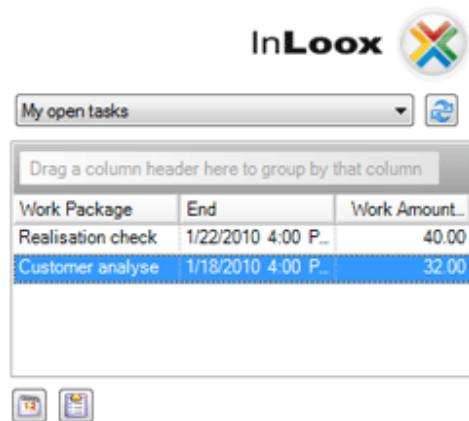
Updates the document list from the Project **Documents Page**

InLoox Task Overview

INLOOX TASK OVERVIEW

Open an Outlook calendar or task list. The **InLoox Task Overview** can be seen on the right.

Each entry in this overview shows one task in one project. A **typical view**:



The **format** is as follows:

- tasks displayed in **red** are **overdue**
- tasks displayed in **black** are on time or completed (according to the selected view)

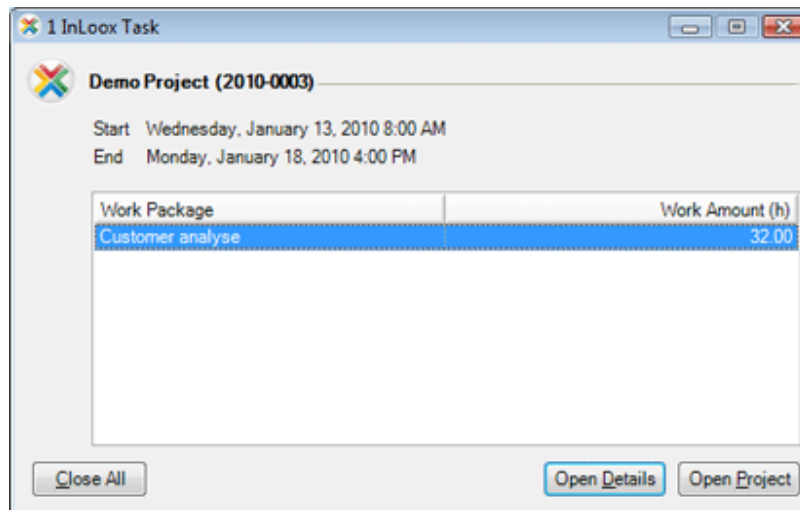
The following **views** are available:

Name	Description
My open tasks	Personal tasks with state "open" (i.e. "to be carried out")
My completed and inactive tasks	Personal tasks with state "completed"
Project manager's view (open tasks)	Tasks of all members of projects of which you are manager (*) with state "open" (i.e. to be carried out")
Project manager's view (completed and inactive tasks)	Tasks of all members of projects of which you are manager (*) with state "completed"

(*) If you have read permission for all projects (in InLoox Personal Edition this is always the case, in InLoox Workgroup or Enterprise Edition you will need a user-based permissions), all tasks are displayed in the **project manager's view for all tasks**.

All **open tasks** assigned to you are displayed. These tasks are work packages containing planning elements. It is possible to create new tasks in the **Planning** Page, in which, for example, you can assign a **resource** to a **phase** and inform them via the dialog box **InLoox Task**.

InLoox notifies new tasks to the user concerned and displays all tasks in their personal **InLoox task overview**. When you receive a new task, the dialog box **InLoox Task** is displayed:



1. Select an entry from the list. The **planning data** are shown:
 - **Project name and number**
 - **Time frame or time**
 - Your personal **work amount** (in hrs)
2. Click on one of the following:
 - **Open details**
Additional information on the task is displayed
 - **Open project**
The project concerned is opened
 - **Close all**
Closes the dialog box
3. The task appears immediately in the **InLoox task overview**. You will be **informed automatically** of any changes.

The principal **features** of the task overview are:

- A double click on **an entry opens** the relevant **work package**.
It is possible here to open the project or view the following details:
 - **Project name and number**
 - **Description, Start and End** of the work package
 - **Detailed description**
 - **Work amount** in hours

- **State** (completed or open)
- Click with the **right-hand** mouse button on an entry to open a **popup menu** with the following commands:
 - **Display details** and **open corresponding project** (for description see previous section)
 - **Flag task as completed**: Concludes the work package and moves it to the view "**My completed and inactive tasks**" or "**Project manager's view (completed and inactive tasks)**"
 - **Record activity** provides convenient access to the facility for time recording for the task
 - **Update** refreshes the view
 - **Display filter** permits specific tasks to be included or hidden
 - **Select fields** shows a list of available columns

DISPLAYING AND PROCESSING WORK PACKAGES

A brief summary of how to transfer work packages to your calendar or task folder:

If you are planned into an InLoox project, the project planner can pass information to you in various ways:

- by automatic **Outlook task or meeting request**
- by automatic **email**
- by **InLoox task**

Option 1: by **Outlook task or meeting request (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.
2. You see the following **planning data**:
 - **Project name and number**
 - **Time frame or date**
 - Your own **effort**
 - **Location**
 - involved **resources**
3. You have the following options:
 - **agree**, whereupon Outlook automatically creates an entry in your **task list** or **calendar**.
 - **decline**

Outlook reports the response to the project planner. In the case of a task request the project planner is kept constantly informed about the progress of and changes to all tasks assigned to you.

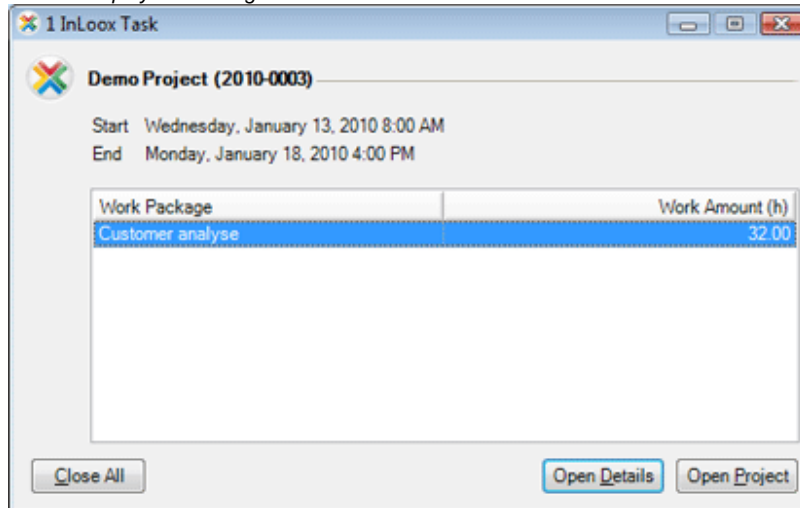
Option 2: by **email (*)**

1. You receive an email, for example with the title "*New element (Strategic Project #2007-0002) : Max Smith (msm@test.com)*". Sender is the project planner.
2. You see the **planning data**:
 - **Project name and number**
 - **Time frame or date**
 - Your own **effort**
 - **Location**
 - involved **resources**
3. You have the following options:
 - **accept** and create an entry in your **calendar** or **task list** manually.

- **decline** and reply in free form via your email software.

Option 3: by **InLoox task** (*)

1. Outlook displays the dialog box **InLoox task**:



2. Click on an entry in the list. You see the **planning data**:
 - **Project name and number**
 - **Time frame or date**
 - Your own **effort** (in hours)
3. Click on one of the following:
 - **Open details**
Further information on the task is displayed
 - **Open project**
The project is opened
 - **Close all**
Closes the dialog box
4. You see the open InLoox tasks in the **InLoox Task Overview**. You are **informed automatically of any changes**.

(*) The type of communication is selected by the project planner. Users without InLoox can only be informed via **task request, meeting request or email**. The project planner can also decide to withhold information from a resource.

Continue to Storing files and documents

Options

INLOOX OPTIONS

This chapter describes the changes to the basic parameters and the set-up of permissions in the InLoox software. To find out more about the customizing options of InLoox, please refer to the chapter on **Detailed Information: Configuration**

The administrator opens the **InLoox Options** as follows:

1. Click on the menu command **Tools** in the **InLoox Toolbar**
2. Click on **Options**


The **InLoox Options** contain seven tab pages:

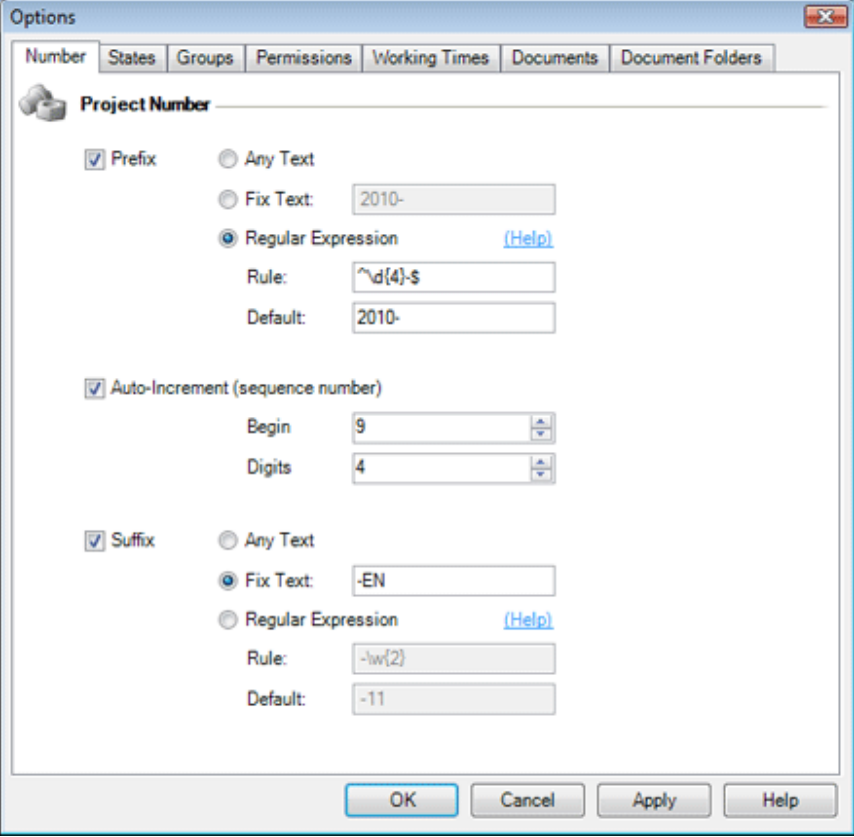
1. **Number** defines the structure of the project number
2. **States** contains the available status values for all InLoox projects
3. **Groups** defines the groups for planning elements, activities and budgets
4. **Permissions** supports the restriction of user access to the database
5. **Working Times** permits the setting up of standard working times for the **Planning Page**
6. **Documents** defines the standard paths and subfolders for the **Document Page**
7. **Document Folders** defines the folder structure of the document folders

Number Page

INLOOX OPTIONS: NUMBER

The options page **Number** defines the format of the project number. There is a wide variety of customizing options. The format of the project number takes effect on the **Manage** Page.

 Please note the possible **effects** when changing the project number format. These are described in this chapter.



The screenshot shows the 'Options' dialog box with the 'Number' tab selected. The 'Project Number' section is expanded. It contains three main sections:

- Prefix:** The 'Prefix' checkbox is checked. Underneath, 'Any Text' is unselected, 'Fix Text' is unselected with a text box containing '2010-', and 'Regular Expression' is selected. The 'Rule' text box contains '^d{4}\$' and the 'Default' text box contains '2010-'. A '(Help)' link is next to the 'Regular Expression' option.
- Auto-Increment (sequence number):** The 'Auto-Increment (sequence number)' checkbox is checked. The 'Begin' spinner box is set to '9' and the 'Digits' spinner box is set to '4'.
- Suffix:** The 'Suffix' checkbox is checked. Underneath, 'Any Text' is unselected, 'Fix Text' is selected with a text box containing '-EN', and 'Regular Expression' is unselected. The 'Rule' text box contains '-lw(2)' and the 'Default' text box contains '-11'. A '(Help)' link is next to the 'Regular Expression' option.

At the bottom of the dialog are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.

Detailed description of **Number** page:

Project Number:

- It is possible to use a prefix (leading character string), a sequence number and a suffix (trailing character string).
- At least a **prefix** and a **sequence number** are required.
- The **prefix** and **suffix** can be combined with the **sequence number**

Prefix and **suffix** are defined as follows:

Mode	Data type and significance
Any text	Any character string of any length, which can be changed
Fix text	Any character string of any length, which cannot be changed , e.g. the word Project
Regular expression	Input a format and an example . Please note the Format Rules When a project is created InLoox checks whether the project number used is of the format defined here. If not, a message is displayed asking the user to correct the project number.

Examples of common formats:

Example	Configuration
<p>Four-digit year combined with sequence number (e.g. "Project 2008-008") components:</p> <ul style="list-style-type: none"> "Project 2008-" (fixed prefix with year) "Sequence number" (maximum 3 digits with leading zeroes) 	<p>Prefix: Rule: ^Project \d{4}-\$</p> <p>Standard value: Project 2008- or Project 2009-</p> <p>Sequence number: Number of digits: 3</p> <p>Suffix: none</p>
<p>Sequence number with country code components:</p> <ul style="list-style-type: none"> "Sequence number" (maximum 5 digits with leading zeroes) Country code (-DE, -AT, -FR, ...) 	<p>Prefix: none</p> <p>Sequence number: Number of digits: 5</p> <p>Suffix: Rule: ^-lw{2}\$</p> <p>Standard value: -DE</p>
<p>Simple sequence number</p> <ul style="list-style-type: none"> "Sequence number" (maximum 6 digits with leading zeroes) 	<p>Prefix: none</p> <p>Sequence number: Number of digits : 6</p> <p>Suffix: none</p>
<p>Free format</p>	<p>Prefix: any text</p> <p>Sequence number: none</p> <p>Suffix: none</p>



Effects of changing the number format:

- **New projects** are created automatically with numbers in the new format.
- **Existing projects** retain their old numbers.
- A sequence number, once used, **cannot be used again**.

NUMBER FORMAT RULES

The options page **Number** defines the format rules for project numbers. Please note the possible effects when changing settings. These are described in the chapter on InLoox Options: Number Page.

The following options are available:

Character	Data type and significance
.	Any single character
\d{COUNT}	Any numeric (0-9) with COUNT digits. COUNT stands for any positive integer, e.g. 5
\w{COUNT}	Any character string (A-Z, a-z, 0-9, underscore "_") with ANZAHL characters. ANZAHL stands for any positive integer, e.g. 5
\D{COUNT}	Any character string (A-Z, a-z, special characters, umlauts, spaces) with COUNT characters. Numerics not allowed
W	Single special character. (A-Z, a-z) or numeric (0-9) not allowed
STRING	STRING stands for a fixed character string specified by the user, e.g. Project, Department_A, PID
^STRING\$	Expressions placed between ^ and \$ must not be empty and must be of the defined length. The only permissible input in this example is STRING. Without ^ and \$, STRING1234 or an empty text is also a valid input.

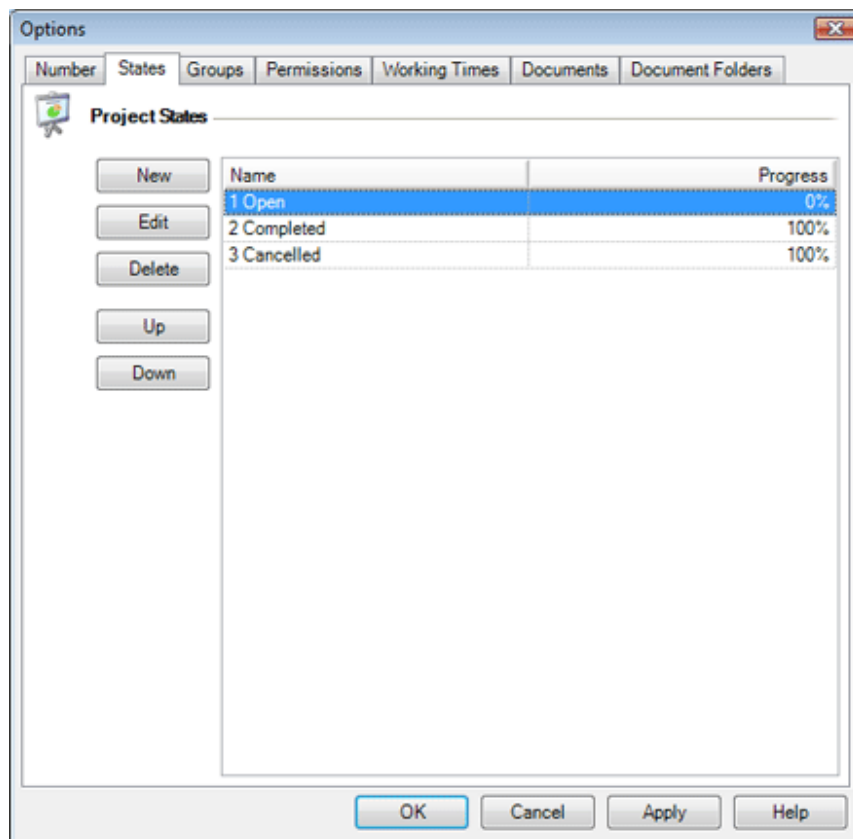
Sample formats:

Format	Examples
..\d{4}	right: Ab_1234, ?!_0000 wrong: 12-1234, ab-abcd
SAMPLE...	right: SAMPLE1234, SAMPLEABCD, SAMPLEab12, SAMPLE wrong: SAPMLE1234, 1234SAMPLE
\w{2}-\d{2}	right: ab-12, AB-12, 01-12, a1-99 wrong: 12-ab, öö-12, ??-12
W{2}SEPARATOR\D{2}	right: !!SEPERATOR12, 12SEPERATOR12, abSEPERATOR!? wrong: !!TRENNab, 12SEPERATORab, abSEPERATOR12

INLOOX OPTIONS: STATES


The options page **States** defines the different stages of development and completion a project can be in. A wide range of statuses can be defined coupled with a percentage to show the **state of progress** of the project. The project status is available for use on the **Manage** Page of every InLoox project.

⚠ Please note the possible **effects** when changing and deleting project statuses. These are described in this chapter.



Detailed description of the **Status** page:

1. **New**: create a new project status
 - Input a **Name** and degree of **Progress (in %)**
 - The progress is a percentage figure, i.e. an integer between **0** and **100**
2. **Edit**: changes the selected status
3. **Delete**: removes the selected status
4. **Up**: moves the selected status towards the top of the list
5. **Down**: moves the selected status towards the bottom of the list
6. **Project States list**: contains the name and progress of each state. The sequence of this list corresponds to the sequence displayed in the **projects**. Double click on an entry which is to be changed.


 Effects of changing or deleting **Project States**:

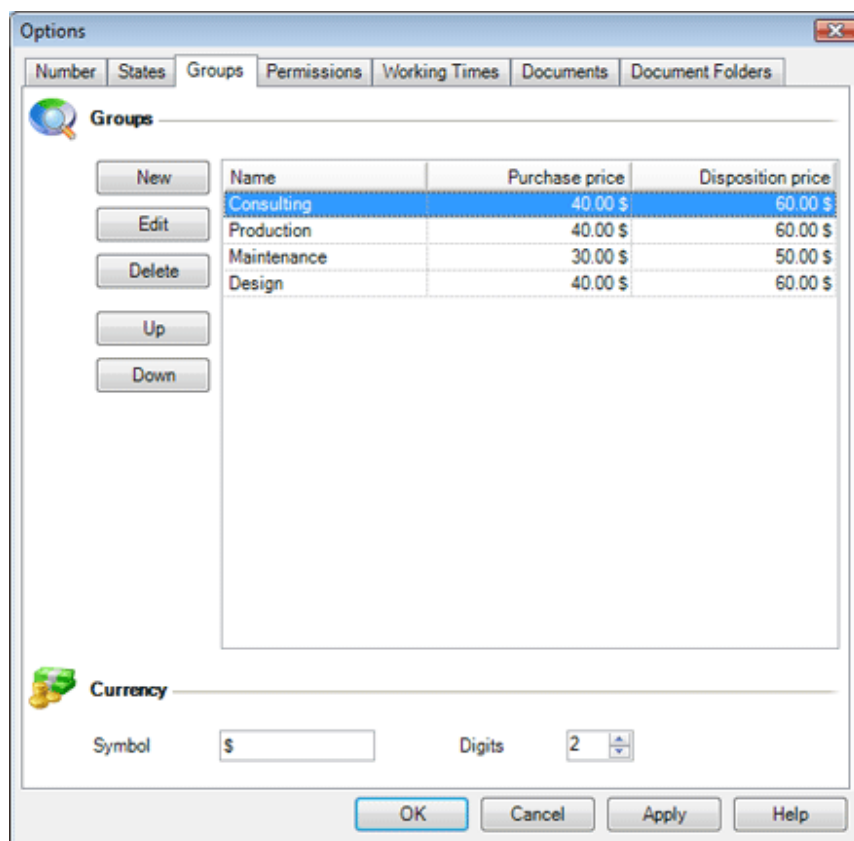
- Adding a new state has no effect on existing projects.
- Changing the sequence of states has no effect on existing projects.
- Changes to the state (e.g. **Name**, **Progress in %**) take immediate effect in all relevant projects.
- **Deleting** a state causes all projects using it to remain without state until the user makes a **manual correction**.

INLOOX OPTIONS: GROUPS

The options page **Groups** defines the groups which can be used in each InLoox project on the **Planning**, **Activities** and **Budget** pages. The groups help structure the data more meaningfully allow ongoing automatic comparison between activities, planning and budgets. They can also carry a **currency code**.

 Please note the possible **effects** when changing settings. These are described in this chapter.


 Purchase and selling prices are used on the **Budget** Page, for example to prepare activities recorded on the **Activity** Page for billing.




Detailed description of the **Groups** page:

1. **New**: creates a new group
2.
 - Specify a **Name** and a **Purchase** and **Selling price**.
 - The currency can be defined in the **Currency** area
3. **Edit**: changes the selected group
4. **Delete**: removes the selected group
5. **Up**: moves the selected group towards the top of the list

6. **Down**: moves the selected group towards the bottom of the list
7. **Group List**: the sequence of this list corresponds to the sequence displayed in the **projects**. Double click on an entry which is to be changed
8. **Currency**: systemwide definition of the currency **Symbol**, e.g. **€**, **\$**, **CHF** or **£**
9. **Digits**: systemwide definition of the number of decimal places (for non-integral amounts)

 Effects of changing or deleting **Groups**:

- Adding and renaming groups has no effect on existing projects
- When group prices are changed the old amounts at first remain unchanged in all projects. The amounts are updated when the relevant planning element, activity or budget asset is **next processed**.
- Deletion of groups has a **permanent** effect, namely that
 - the group and associated amounts are no longer displayed in the budget overview.
 - for all planning elements, activities and budget assets using the deleted groups must be assigned a new group **when next edited** .


 Effect of changing a **currency symbol**:

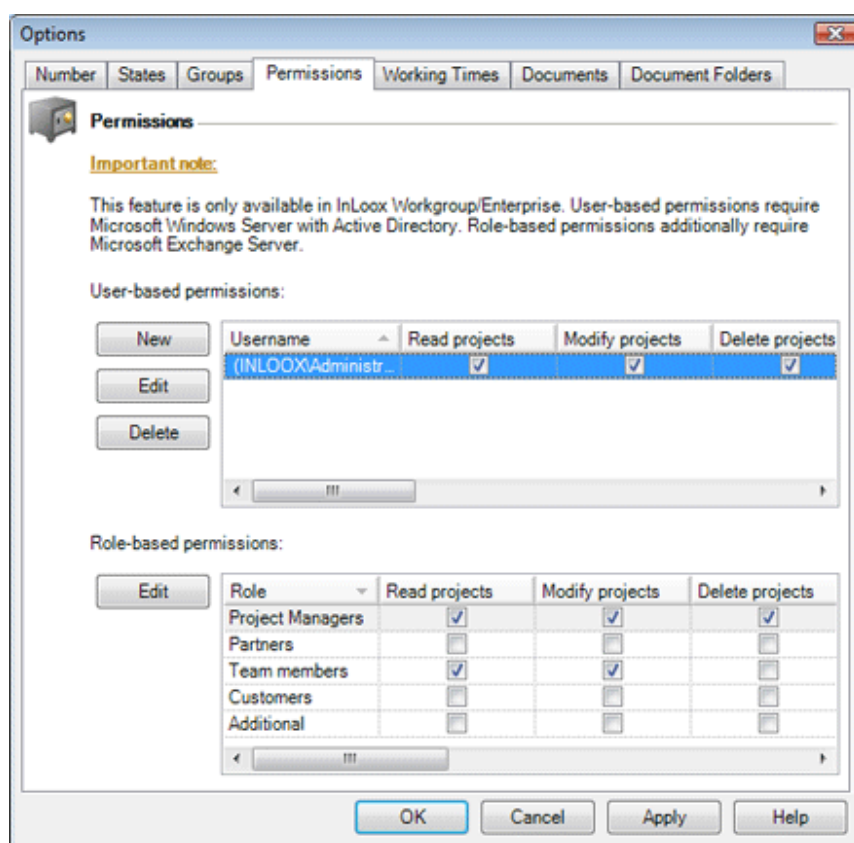
- The currency is not automatically redenominated. If, for example, **€** is replaced by **\$**, InLoox does not recalculate the amounts, but simply changes the currency symbol as if the rate of exchange were 1:1.

Permissions Page


INLOOX OPTIONS: PERMISSIONS

The options page **Permissions** is used to restrict the views and features available to specific users under InLoox **Workgroup** and **Enterprise Edition**.


 **Note:** InLoox is delivered without permissions. Thus **every user** can see and change all permissions. This is a security risk.



Permissions are either **role-based** or **user-based**:

Permission Mode	Remarks
User-based permissions	<ul style="list-style-type: none"> Permissions based on Windows user accounts. Active directory accounts (in domain mode) and local Windows user accounts (in workgroup mode) are supported. Apply across all projects and to the entire database  Note: InLoox does not support Windows groups at this time
Role-based permissions	<ul style="list-style-type: none"> Users acquire permissions through membership of a role in the project. Project members are all persons who are listed in the

project as **"In Charge"**

- Possible roles: **Project manager, Team member, Customer, Partner, Other**
- **Microsoft Exchange Server** is required
-  **Note:** Persons are identified by their **Windows Security Identifier**, or SID, and their **X400 address**, or Exchange address. **Persons with the same X400 address have the same role-based permissions under InLoox.** If this is not so desired, please deactivate the role-based permissions entirely by removing all permissions for all roles.



Important note:

InLoox **combines** role-based and user-based permissions. The permission records of both modes are added. The example below illustrates a common configuration

- The role **"team"** may **"read projects "** and **"read budgets"**. All other roles are ignored for the sake of clarity.
- The user account **"John Smith"** is authorized to **"edit projects "** and **"edit budgets"** (A List of InLoox Permissions can be found here.)
- **"John Smith"** is part of the **"team"** in the project **"Product Development"**
- There are three other projects in which "John Smith" is not involved and therefore does **not** have the role "team"

In result, these permissions apply to John Smith:

- He may read and edit the project **"Product Development"**. He may also read and edit budgets in this project. John Smith has these permissions **in all projects** in which he is in the **team** role.
- "John Smith" cannot see any projects in which he is not a team member. He does not have the permission to "read projects", which is a prerequisite for all other permissions. Thus John Smith has no permissions for any other projects.

The following applies to all other team members involved in the project **"Product Development"**:

- They may read the project **"Product Development"** and read but not edit budgets. They do not have the permission record of the account "John Smith"
- Persons who are team members in other projects than **"Product Development"** can see, in contrast to John Smith, a number of projects but may not edit any of them.

InLoox permissions are extremely flexible and allow a wide variety of scenarios to be covered without high administration effort. If you have questions on the assignment of permissions, we will be pleased to help.

Detailed description of the **user-based Permissions** area:

1. **New:** creates a new user permission.
*The dialog box **Permissions** is displayed.*
 - Click on the button "..."
 - Select an **account** in the dialog box **Select user**. Either **Active Directory Accounts** or **Local Windows Accounts** can be selected.
 - To select an **Active Directory Account** click on the button **Paths**. In the dialog box **Path**, select in the node **Entire Network**
 - Input the required user name into the field: **Input the object name to be used**
 - Click on **Check name**. A user name that has been recognized by Windows is shown **underlined**
 - Click on **Advanced...** if you need to search for a user name.
 - Click on **OK**
 - Select the **Permissions** for the user. A List of InLoox Permissions can be found here.
 - Click on **OK**
2. **Edit:** changes the selected user permission
3. **Delete:** removes the selected user permission

Detailed description of the **Role-based Permissions** area:



Note: Role-based permissions are only active when at least one user-based administrator permission exists.

1. **Edit:** changes the selected role-based permission
*The dialog box **Permissions** is displayed.*
 - Select the **Permissions** for the role. A List of InLoox Permissions can be found here.
 - Click on **OK**

LIST OF INLOOX PERMISSIONS

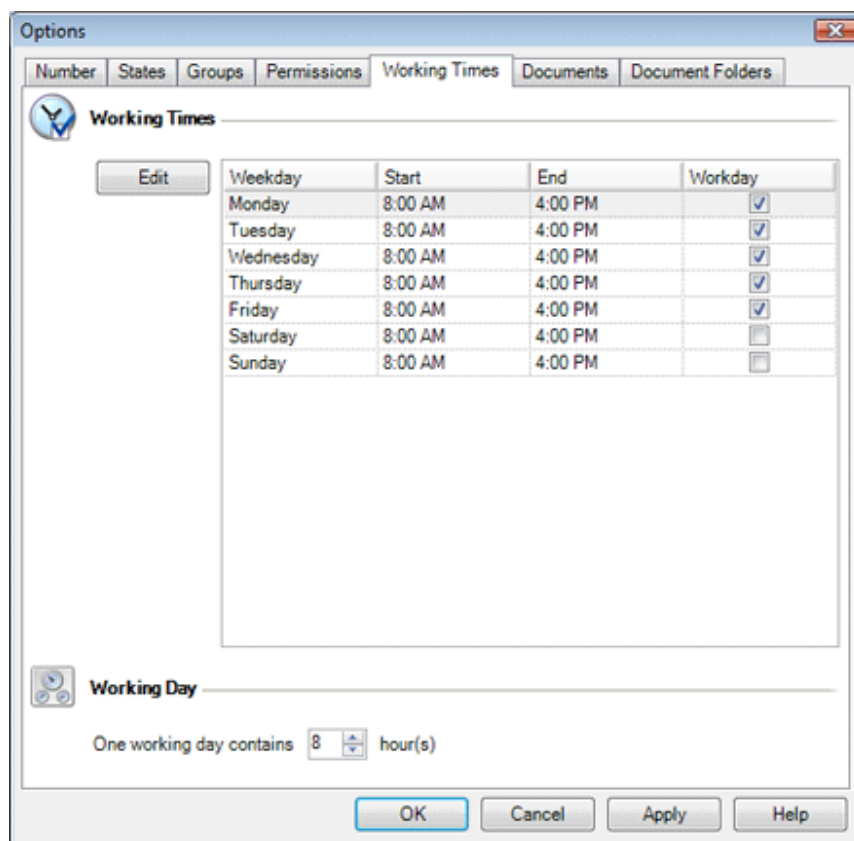
The following permissions apply under InLoox **Workgroup** and **Enterprise Edition**. Users or roles can be assigned permission for the actions listed.

Description	Permission	Restriction or Prerequisite
Create projects	User has the right to create new projects	Only available with user-based permissions
Read projects	<ul style="list-style-type: none"> Project visible in the InLoox Project Overview Project can be opened Project can be exported if the "right to use existing reports" is awarded 	none
Read "Plan"	Right to read all planning elements of a project (see Planning Page)	Prerequisite: Read projects
Read "Activities"	Right to read all activities of a project (see Activity Page)	Prerequisite: Read projects
Read "Document"	Right to open and read all documents of a project (see Document Page)	Prerequisite: Read projects
Read "Budget"	Right to read all budgets, budget assets and the budget overview of a project (see Budget Page)	Prerequisite: Read projects
Edit projects	Project can be changed. This right is a prerequisite for all actions which allow to modify data.	Prerequisite: Read projects
Edit "Manage"	Right to change project master data on Manage Page (except project contacts)	Prerequisite: Edit projects
Edit project contacts	Project contacts can be added, changed or deleted. It is thus possible for the user to control the roles of persons in a project (see Manage Page In charge Area)	Prerequisites: <ul style="list-style-type: none"> Edit projects Edit "Manage"
Lock projects	Project can be locked for other users (see "Mode" feature on the Manage Page). User without permission may not edit locked projects and cannot remove the lock	Prerequisites: <ul style="list-style-type: none"> Edit projects Edit "Manage"
Edit "Planning"	Allows adding, changing and deletion of all planning elements of a project (see Planning Page)	Prerequisite: Edit projects

Edit "Activities"	Allows adding, changing and deletion of all activities of a project (see Activity Page)	Prerequisite: Edit projects
Edit "Document"	Allows adding, changing and deletion of all documents in the document list of a project (see Document Page)	Prerequisite: Edit projects
Edit "Budget"	Allows adding, changing and deletion of all budgets and budget assets of a project (see Budget Page)	Prerequisite: Edit projects
Delete projects	Project can be deleted	none
Use existing reports	All reports can be used. The InLoox report generator filters from the report all data that the user has no right to see (e.g. if no right to read budgets has been granted, no budget data will be included in the exported reports.)	none
Create and edit report templates	Allows the creation, changing and deletion of report templates (see menu command Edit Report Templates)	only available for user-based permissions
Administrator	<p>Controls access to master data maintenance and administrator functions. These include the following menu commands in the InLoox Toolbar:</p> <ul style="list-style-type: none"> • Edit planning templates (right to rename and delete InLoox planning templates) • Edit budget assets (right to create, change and delete InLoox budget assets) • Edit budget state (right to create, change and delete InLoox budget states) • Edit notifications (right to change Notification templates) • Edit categories (right to create, change and delete InLoox Categories) • Edit custom fields (right to create, change and delete Custom fields) • Remove project locks (right to remove Data record locks) • Project-recycling bin (right to restore or permanently remove deleted projects) • Import data from Version 4.x (right to migrate data from earlier InLoox versions) • Licenses (right to add and delete InLoox License codes) • Options (right to change the InLoox Options. Incorporates the right to change permissions) 	only available for user-based permissions

INLOOX OPTIONS: WORKING TIMES

The options page **Working Times** permits the setting of a system wide work calendar. This is the basis for the billing of work hours and costs on the **Planning** Page. It is possible to define *one* calendar for *all* resources. Overtime is not taken into account in the planning, which is based on the company's standard working day. This prevents the recording and controlling of resources from becoming too complex. Overtime can be recorded at any time on the **Manage** Page.




Detailed description of the **Working Times** area:

1. **Edit**: changes the working times on the selected week day.
*The dialog box **Edit Working Times** is displayed.*
2.
 - Specify whether the day concerned is a **working day**. Non-working days are not included in the calculation. This determines which days are to be taken into account in the cost calculation on the **Planning** page.
 - Input **Work starts** and **Work ends** for the day
 - Click on **OK**

Detailed description of the **Working Day** area:

1. **The working day contains "X" hours:**
Defines the number of hours in a working day. This parameter helps the user in inputting time periods for **Phases** and workloads for **resources**

 **Note** on billing of working time and costs:

- If **working times** are changed or **working days** are activated or deactivated, the internal costs of a project are only then changed when the relevant element is opened and the project saved.
- The billing of internal costs on the **Planning** Page only takes account of the number of work hours of posted resources in the planning phases.
- The values specified here define the standard start and end for new planning elements. The use of working times facilitates the input of **phases** and **milestones**.


INLOOX OPTIONS: DOCUMENTS

The options page **Documents** defines the rules for the InLoox file archiving feature. There are several customizing options. The format of the project number affects the **Document Page**. It is possible to update the contents of the project folder automatically.

⚠ Please note the possible **effects** when changing settings. These are described in this chapter.

Detailed description of the options page **Documents**:

1. **Automatically update document list on project startup:** Documents are read anew when the project is loaded. This option slows down the opening of a project but ensures automatically that the **Documents Page** always show up-to-date information.
2. **File Server**
 1. **Base path:** UNC resource, e.g. \\server1\projects or C:\Projects\
 2. **Rule:** Structure for individual projects. The following criteria can be combined as desired:
 - <PROJECT_NAME> (Project name on the **Manage Page**, "Project Area")
 - <PROJECT_NUMBER> (Project number on the **Manage Page**, "Project Area")
 - <COMPANY_NAME> (Customer name on the **Manage Page**, "Project Area")

 The **Standard parameter** <COMPANY_NAME>\<PROJECT_NUMBER>
<PROJECT_NAME> points automatically to the following folder structure:
<BASEPATH>\Customer1\2008-001 Project 1
<BASEPATH>\Customer1\2008-002 Project 2
<BASEPATH>\Customer2\2008-003 Project 1

3. SharePoint Server site


1. **Base path:** Path to a SharePoint server site, e.g. `http://companyweb/` or `http://www.my-sharepoint.com/site_int/`
2. **Document library rule:** Structure for creating **SharePoint document libraries**. A fixed text may be input (which causes all projects to use the same library) or a rule (see file server rule, above). Creating a separate **SharePoint document library** for each project has the advantage that the data access permissions can also be defined separately.
3. **Subfolder rule (optional):** Path name within a **SharePoint document library**. If no text is input the master folder of the document library is assumed. If only one **SharePoint document library** is to be used, it is useful to apply a rule (see File Server, above), since otherwise the documents from all projects would be copied to the same folder.

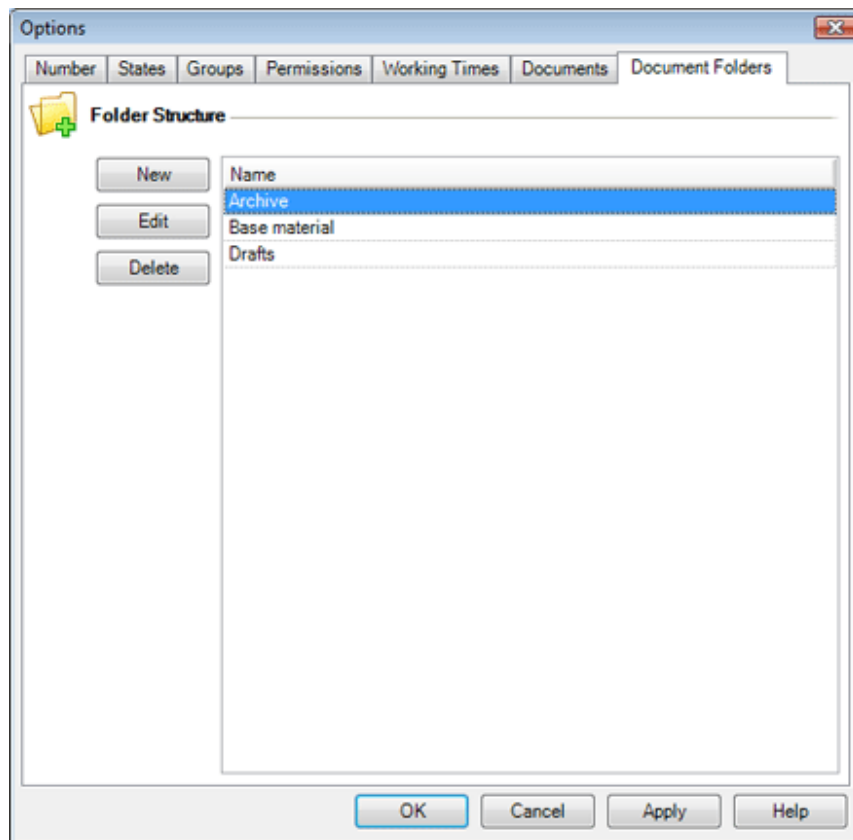
Effects of changing **Storage type, Basepath** or **Rules**:

- If no projects are yet on file, changing these parameters has no effect.
- **New Projects** or **projects for which no document folders exist** are managed automatically according to the changed parameters.
- **Existing projects** are managed with the existing document folder until the user changes this manually.

INLOOX OPTIONS: DOCUMENT FOLDERS

The options page **Document Folders** specifies subfolders created automatically when the InLoox file archiving facility is used. InLoox allows subfolders to be created automatically in each document folder of a project. These subfolders are created new as soon as a user selects a new project folder on the **Document Page**. As many subfolders as required may be created automatically in a hierarchy structure of any depth.

 Please note the possible **effects** when changing settings. These are described in this chapter.



Detailed description of the **Folder Structure** area:

1. **New**: creates a new subfolder
 - Input for example **Basics\Plans**. InLoox creates in each project document folder a folder named **Basics**, which contains a subfolder named **Plans**.
 - Click on **OK**
2. **Edit**: changes the selected subfolder
3. **Delete**: removes the selected subfolder

 **Effects** of changing **Base path** or **Rules**:

- Existing subfolders are **not deleted or renamed** when the subfolder configuration is changed.
- In existing projects, new structures only become effective when new documents are added.

Detailed information

Installation

DETAILED INFORMATION: INSTALLATION

Please note that Outlook must already be installed and fully operational before InLoox is installed. The installation usually takes no longer than five minutes per client. The server installation (only required for InLoox **Workgroup** and **Enterprise** Edition) can be performed out from the client.

Step-by-step instructions for the installation can be found in the **Download area** of the **Support Center**:

- for InLoox **Personal**
- for InLoox **Workgroup**
- for InLoox **Enterprise**

The download area contains an **MSI package** for deployment via software distribution to multiple clients.

In case of problems, please contact our **Installation Support**.

DETAILED INFORMATION: INSTALLATION: SUPPORT

Outlook is a complex software product. Difficulties in connection with the installation of InLoox are not common but are too complex and too new to have been described in the Help file. **Please note that we can unfortunately only deal with problems arising from the installation of InLoox and not with general Outlook problems. Please also note that we are in the CET time zone (GMT+1).**

IQ medialab GmbH

Internet: www.inloox.com/support/

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Phone: +49 (89) 323 919 22

Configuration

DETAILED INFORMATION: CONFIGURATION

This chapter describes the customizing and configuration options of InLoox.

Data Storage and Management:

- InLoox is a database-oriented software product integrated with Outlook and uses **SQL (Standard Query Language)** for its data management. More information on this topic can be found in the chapter on Data Storage.
- The chapter on deleting Project Locks describes how data locks in the InLoox database can be removed.
- The Project Recycle Bin permits the restoration of projects deleted by users
- The chapter Data Backup explains how to use your existing backup systems to secure your InLoox data resources.
- The chapter Offline Availability explains how individual workstations can be configured in InLoox **Workgroup** to allow operation of InLoox when disconnected from the network.

Master Data Maintenance:

- Changing base parameters and the setting up of simple permissions are described in the chapter on **InLoox Options**
- InLoox permits the export of projects, activities, plans, documents and budgets in many formats. The creation, contents and scope of the export templates can be changed. See the chapter on Customizing Report Templates
- Create individual **InLoox Budget Assets** within Outlook. It is possible to create new assets and edit and delete existing ones. InLoox Budget Assets are accessible for all users of the **Budget Page** when creating new documents such as Expenses, Calculations and Invoices. It is also possible to customize the **InLoox Budget States**
- The chapter on editing categories explains how to change the master category list systemwide.
- **InLoox Planning Templates** permit the efficient management of standard project plans. The list of planning templates can be edited or deleted.
- The base parameters for task requests, emails and calendar entries generated by InLoox can be defined and edited under **Edit Notifications**
- The data model of InLoox can be expanded as required. A how-to on **Custom Fields** modification describes how personalized text fields can be added and deleted.

Data transfer and migration from earlier versions:

- The topic Importing Data from Version 4.x covers the transfer and migration of existing InLoox folders.

Error Handling:

- The chapter on Error Handling deals with common problems and proposes solutions.

- It is possible that the program will issue an exception error. More information can be found in the chapter on Program Exceptions

Expanding and modifying the InLoox software:

- It is possible to change the display, colors and columns of the **InLoox Project Overview** and transact simple **workflows**. More information can be found in the chapter on Generating Personalized Views.
- All screen texts and messages can be customized by the InLoox administrator. More information can be found in the chapter on Customizing the Language Files
- It is possible to add licences to your InLoox installation and manage existing ones. More information can be found in the chapter on Licence Management

Data Storage and Management

DETAILED INFORMATION: CONFIGURATION: DATA STORAGE

There are essential differences between the current version of InLoox and earlier generations of the product.

As a consequence of providing an effective permission system and improving response times, InLoox has been redesigned to support data storage in **SQL databases** (SQL = "Standard Query Language").


The following systems are used by the various InLoox editions:

InLoox edition	Data storage
Personal	via Microsoft SQL Server Compact Edition. Data is stored in a file which normally carries the extension .SDF (SQL Server Compact Edition Database File). Filename is InLoox.sdf . The file is located in the InLoox installation folder
Workgroup and Enterprise	Database management systems supported for networked operation are: <ul style="list-style-type: none">• Microsoft SQL Server (all versions and editions of SQL Server 2005 and 2008)• Oracle (versions 10g, 9i, 8i, 8.0, including "Personal", "Express" and "x64" editions)• MySQL (versions 4.1 and 5.0)

DETAILED INFORMATION: CONFIGURATION: DATA BACKUP


Existing backup systems can be used for all **InLoox data**. The backup cycle, i.e. the frequency of backups, is determined by the number of InLoox users and the need to fall back on data as current as possible (e.g. a maximum of one week old) in an emergency. As a basic rule **daily backup** of all data is recommended if you are working with InLoox every day.

For a one-off backup there is the menu command **Backup database contents** under **Tools** in the **InLoox Toolbar**.

 **Important notice:** A manual backup is not substitute for a regular data backup and is only for the transfer and migration of database contents.

A regular data backup is carried out as follows:

InLoox edition	Procedure
Personal	It is sufficient to make regular copies of the InLoox files on CD-ROM or tape. The date file, which normally has the extension .SDF (SQL Server Compact Edition Database File), must not be open in any program. The standard name of the file is InLoox.sdf . The file is held in the InLoox installation folder.
Workgroup and Enterprise	Save the entire InLoox database on the server which carries it. Any software that supports the backup while in operation of databases (scheme and data) for the database management system you are using may be used. Unfortunately it takes very much effort to backup offline copies (database replications) located on the user's computers. We recommend to synchronize workstations with the database server at frequent intervals; this strategy reduces the risk of losing changes which were made offline

 **Important notice:** Documents stored in InLoox must be backed up separately. InLoox only saves links to these objects, a backup of the InLoox database is not sufficient to back up the documents as well. The backup strategy and software depend on the storage location of the documents (files on the local computer, the server or the SharePoint document library), the number of users and the data volumes.

DETAILED INFORMATION: CONFIGURATION: CLEANING UP PROJECT LOCKS

InLoox applies to projects being worked on a so-called record lock feature. Under certain circumstances this lock can remain in place, for example when a VPN user unexpectedly got disconnected from the network. To clean up all record locks in the current InLoox folder, proceed as follows:

 **Only clean up the project locks after all users have saved and closed their projects.**

A brief instruction on cleaning up locks

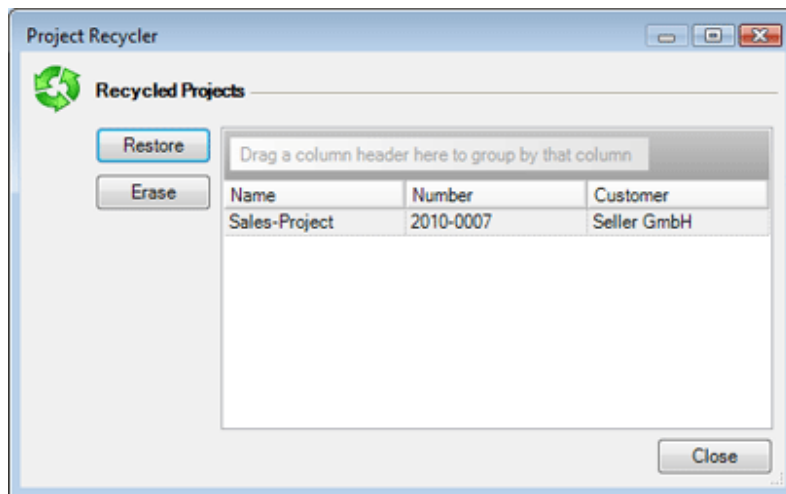
1. Click on the menu command **Clean Up Locks** under **Tools** in the **InLoox Toolbar**
2. Confirm the safety query with **Yes**.

DETAILED INFORMATION: CONFIGURATION: PROJECT RECYCLE BIN

Projects that are deleted in the InLoox Project Overview land first of all in the project recycle bin. This ensures that in networked operation only users with administrator permission are allowed to delete projects permanently. The recovery option improves data protection and allows to simply restore deleted projects.

A brief instruction on the project recovery:

1. Click on the menu point **Tools >> Recycle Projects** in the **InLoox Toolbar**
*The dialog box **Project Recycler** is displayed.*




2. Select a project and click on **Restore**
InLoox restores the project.
3. Click on **Close**

Note

⚠ When a project is **deleted** from the recycler, all data are permanently lost.

DETAILED INFORMATION: CONFIGURATION: OFFLINE AVAILABILITY

Users of InLoox **Workgroup** and **Enterprise** work on a database server. It is possible however to configure individual workstations to operate InLoox separately from the network. When reconnecting with the company network, an automatic synchronization is carried out.


 **Important notice:** Not all database systems support offline availability or replication. InLoox offers the data structures that are needed for synchronization and replication but uses the synchronization features of the database system. In certain circumstances it may necessary to change the database system or related software to take advantage of offline availability. Check the documentation of your database system regarding offline availability and replication.


Step-by-step instructions for the configuration of InLoox for offline operation can be found in the **Download area** of the **Support Center**

If you have problems please refer to our **Installation Support**.

Migrating from earlier Versions

DETAILED INFORMATION: CONFIGURATION: IMPORTING DATA FROM VERSION 4.x

 **Note:** It is not necessary for the migration of data from InLoox V4 that that product be installed. Parallel operation of Versions 4 and 5 is possible.

 **IMPORTANT:** Certain field lengths had to be curtailed in Version 5. Field contents from Version 4 are automatically truncated and a corresponding message issued when data migration is complete.

The administrator procedure for transferring project data from version 4 is as follows:

1. Save all current data resources of both Version 4 and Version 5
2. Start Outlook
3. Ensure that the InLoox folder of Version 4 is visible and accessible with all subfolders(see chapter on Permissions in InLoox 4 Help)
4. Ensure that the current Version 5 is installed on your system and you are connected to the required target database
5. Select in the Toolbar of InLoox 5 the item **Import data from Version 4.x (English)...** under the Menu **Tools**
6. You will be asked to enter the path of the InLoox folder of Version 4. Select the button "..."
7. Click on **Next**
8. If the correct folder was selected the number of projects to be imported will be shown
9. Click on **Start**. The data will be transferred to the new InLoox 5 folder. **During this process you may be called upon to assign certain contacts which could not be resolved automatically by Outlook**
10. When data transfer is completed click on **Next**. The next window shows a summary of the imported data
11. Click on **Close**

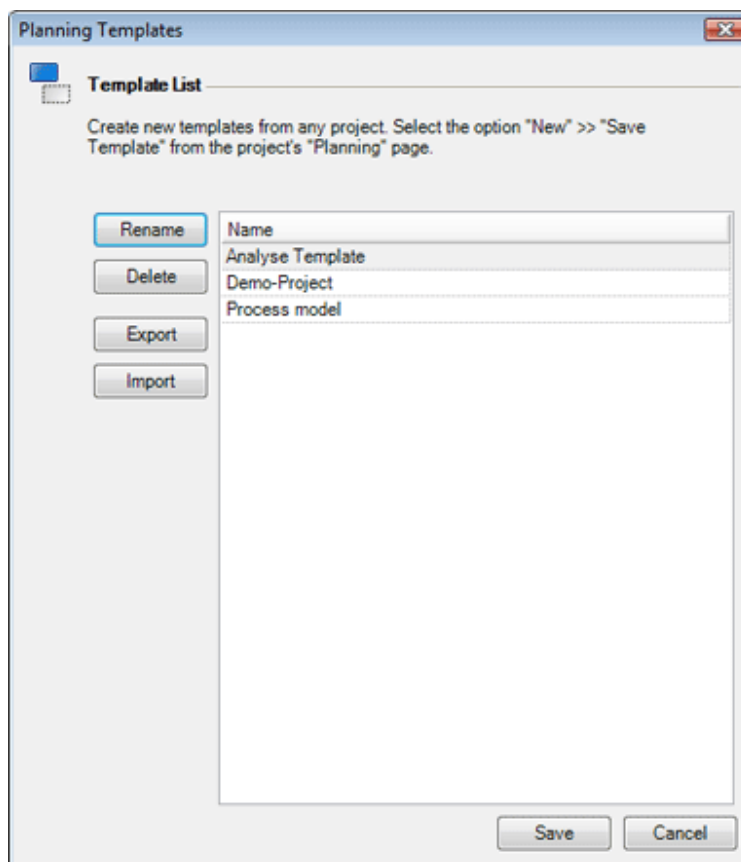
Master Data

DETAILED INFORMATION: CONFIGURATION: INLOOX PLANNING TEMPLATES


Planning templates are used to speed the creation of new project plans and can be called in all **InLoox Projects** on the **Planning Page**. Templates contain predefined milestones, phases and grouping, plus resource data.

A brief instruction in renaming and deleting planning templates

1. Click on the menu point **Edit Planning Templates...** under the menu **Tools** in the **InLoox Toolbar**
*The dialog box **Planning templates** is displayed:*



2. Click on **Rename**
*The dialog box **Rename Planning Template** is displayed.*
3. Specify a **New name** for the template.
4. Click on **Delete** to remove a template permanently.
5. Click on **OK**

 **Hints** for the creation of InLoox planning templates:

- Create templates directly from an InLoox project on the **Planning Page**

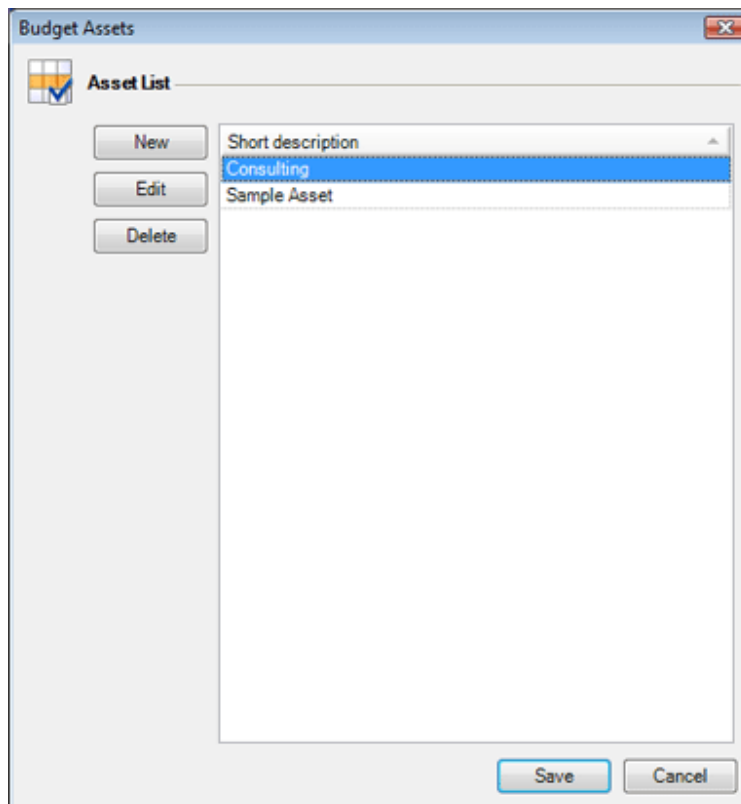
- Templates can be used to generate entire projects or **specific sections** of a project.
- Templates can be exported or imported as files received from other users. Further planning templates can be found in the **Download area** of the **Support Center**

DETAILED INFORMATION: CONFIGURATION: EDIT INLOOX BUDGET ASSETS

The budget asset list contains the assets which can be called up by the users in all **InLoox Projects** on the **Budget Page** for the creation of new expenses, calculations and invoices. The list of assets can be expanded, edited or deleted as required.

A brief summary of the creation of assets

1. Click on the menu point **Edit Assets...** in the menu **Tools** in the **InLoox Toolbar**
*The dialog box **Budget Assets** is displayed:*



- Click on **New**
The dialog box **New Asset** is displayed:

New Asset

Asset

Name: Process Consultation

Description: Aquisition of company processes. Report and optimization analysis.

Quantity: 1.00

Pricing

New Edit Delete

Unit	Purchase pr.	Disposition...
Day	480.00 \$	1,000.00 \$
Hour	60.00 \$	120.00 \$

Group(s)

Design
 Production
 Consulting
 Maintenance

OK Cancel

- Specify the **Asset Name**, **Description**, **Quantity** (Standard is 1.0)
- Click on **New** in the **Pricing** area.
The dialog box **New Unit** is displayed.
- Create at least one unit:
 - Name**, e.g. **Day**, **Cubic meter**, **Flat rate**
 - Purchase price**
 - Selling price**
- Select at least one **Group**
- Click on **OK**
- Click on **Save**

Hints for changing InLoox budget assets:

- The name of each asset should be short and unambiguous.
- The description can include wildcard characters, e.g. **...size is x units...**

DETAILED INFORMATION: CONFIGURATION: EDIT BUDGET STATES

It is possible in the dialog box New Budget / Edit Budget under the budget page of a project to select a budget **State**.
Predefined values of the budget state can be modified as follows:

Brief instruction

1. Click on the menu point **Edit Budget States...** in the menu **Tools** under the **InLoox Toolbar**
2. Carry out the desired changes (**New, Edit, Delete**)
3. Click on **Save**



Effects of modifying or deleting a budget state:

- The **renaming** of a state takes immediate effect in all relevant projects.
- On the **deletion** of a state the relevant budgets have no state until a new state is selected manually by the user and the budget saved.


DETAILED INFORMATION: CONFIGURATION: EDIT CATEGORIES

InLoox uses for its projects its own list of categories, which is separate from that of Outlook. When working networked with InLoox **Workgroup** or **Enterprise Edition** this list provides two significant advantages over the normal Outlook categories list:

- The category list is constant across all workstations. This saves manual reconciliation effort between individual workstations.
- The list can only be maintained by the InLoox administrator, which ensures that only standard categories are available.

Brief instruction

1. Click on the menu point **Edit Categories...** under the menu **Tools** in the **InLoox Toolbar**
2. Carry out the required changes (**New**, **Edit**, **Delete**)
3. Click on **Save**

 **Effects** of editing or deleting a category:

- The **renaming** of a category takes immediate effect in all relevant projects.
- The **deletion** of a category takes immediate effect in all relevant projects.

Customizing Notifications

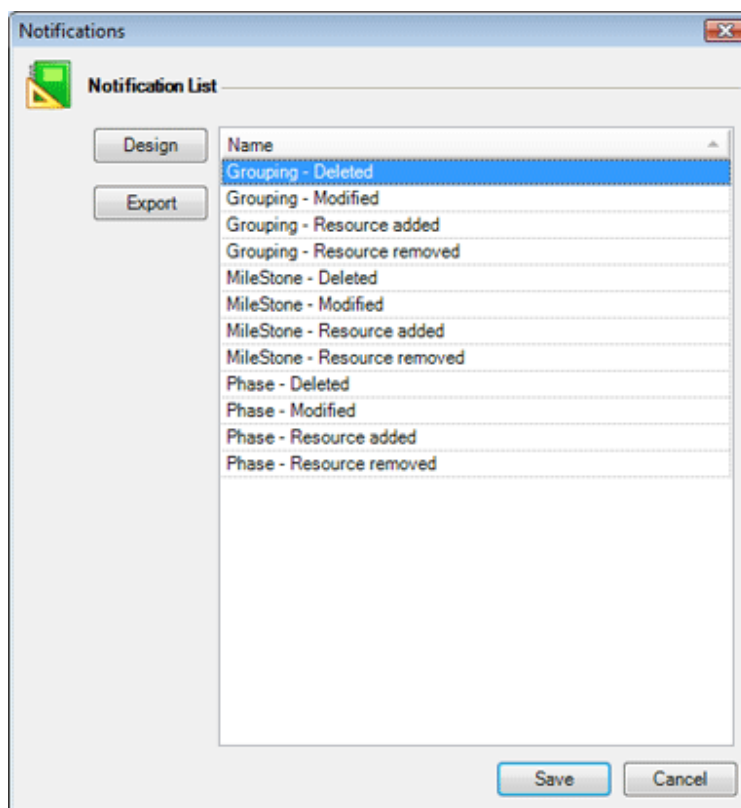
DETAILED INFORMATION: CONFIGURATION: EDIT NOTIFICATIONS

Messages are for the communication of project plans and are sent to those **resources** of an InLoox project whom the **project planner** wishes should be informed automatically.

It is possible to define notifications if various kinds for each milestone, phase and grouping of a project using the **Planning** Page. Resources can receive information via **email**, **task request** or **InLoox reminder**. The message templates contain predefined text elements which can be changed or deleted.

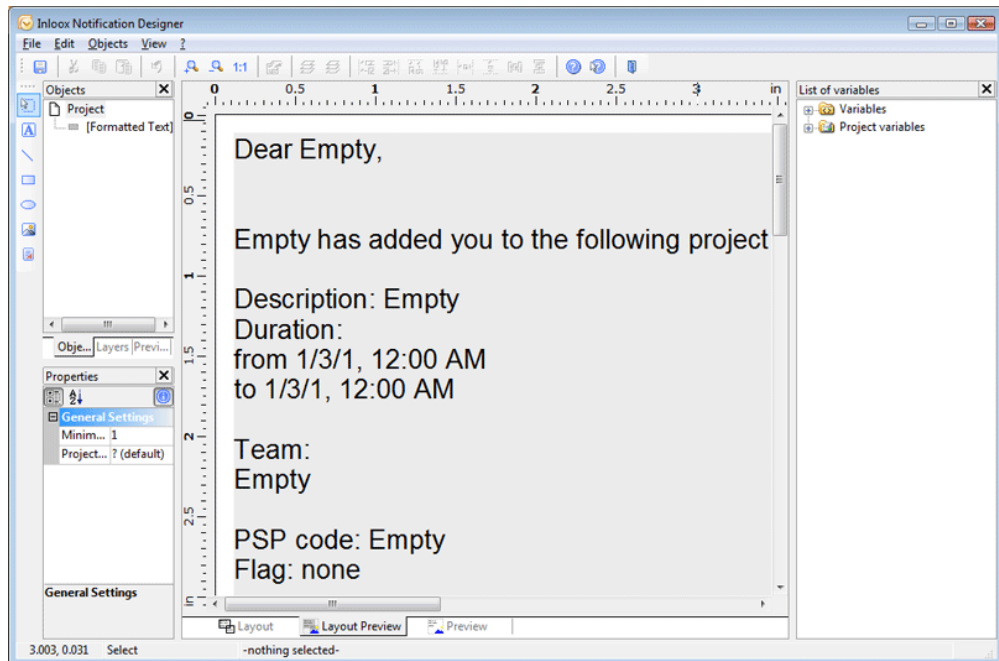
A brief instruction in changing texts for InLoox messages

1. Click on the menu point **Edit Notifications...** under the menu **Tools** in the **InLoox Toolbar**
*The dialog box **Notifications** is displayed:*



2. Select an entry. e.g. **Phase - Resource added**

3. Click on **Design**.
The *InLoox Notification Designer* is displayed:



4. To change the text of the message:
 - **Change the text by double-clicking directly on it**, e.g. Yours faithfully, Muster Ltd
5. Click on **File > Save**
6. Click on **File > Close**
7. Click on **Save**

Hints on changing messages

- A description of how to use the **InLoox Notification Designer** can be found in the chapter on Detailed Information: Reporting: The Designer
- A description of the **message types** can be found in the chapter on Detailed information: Configuration: Edit Notifications: Message Types
- More about the significance and contents of the **Fields (wild cards)** can be found in the chapter on Detailed Information: Configuration: Edit Notifications: Fields

DETAILED INFORMATION: CONFIGURATION: EDIT NOTIFICATIONS: MESSAGE TYPES

Messages are for the communication of project plans. Resources can receive information via **email, task request or meeting request**.

There are specific templates for the various types of planning elements and events which can be personalized.

The following message types are available:

Message name	Application
Phase - Modified	If a phase is changed using the dialog box New Phase / Edit Phase or directly or indirectly within the project plan, InLoox generates this message.
Phase - Resource added	If a resource is added to a phase using the dialog box New Phase / Edit Phase , InLoox generates this message.
Phase - Resource removed	If a resource is removed from a phase using the dialog box New Phase / Edit Phase , InLoox generates this message.
Phase - Deleted	If a phase is deleted from the project plan on the Planning Page, InLoox generates this message.
Milestone - Modified	If a milestone is changed using the dialog box New Milestone / Edit Milestone or directly or indirectly within the project plan on the Planning Page, InLoox generates this message.
Milestone - Resource added	If a resource is added to a milestone using the dialog box New Milestone / Edit Milestone , InLoox generates this message.
Milestone - Resource removed	If a resource is removed from a milestone using the dialog box New Milestone / Edit Milestone , InLoox generates this message.
Milestone - Deleted	If a milestone is deleted from the project plan on the Planning Page, InLoox generates this message.
Grouping - Modified	If a grouping is changed using the dialog box New Grouping / Edit Grouping or directly or indirectly within the project plan on the Planning Page, InLoox generates this message.
Grouping - Resource added	If a resource is added to a grouping using the dialog box New Grouping / Edit Grouping , InLoox generates this message.
Grouping - Resource removed	If a resource is removed from a grouping using the dialog box New grouping / Edit Grouping , InLoox generates this message.
Grouping - Deleted	If a grouping is deleted from the project plan on the Planning Page, InLoox generates this message.

DETAILED INFORMATION: CONFIGURATION: EDIT NOTIFICATIONS: FIELDS

Messages are for the communication of project plans. The various **Message Types** are based on separate templates which the user can furnish with the necessary fields. A **Field** is a **wild card** for information from a project. Fields can be added to or deleted from a message template.

The following fields are available in the messages:

Field name	Description	Contents
PlannerName	Name of planner	The name of the project planner, as stored in Outlook, e.g. Max Planner
ResourceName	Name of resource	The name of the resource or recipient of the message, as stored in Outlook, e.g. Tom Masterresource
ResourceList	Resources	List of all resources involved in a planning element, including email address, e.g. Joe Maddison (joe.maddison@company.com) Jou-Ling Xi (jlx@mailaddress.com)
GroupName	Group	Group to which the planning element belongs. The group is a sort criterion or a project cost center. Note: An internal price per hour is in file for each group . The internal prices and the available groups can be customized under InLoox Options
Description	Description	Multiple-line description of the planning element
Flag	Flag	Flag for the planning element (none, green, yellow, red)
Location	Location	Free text field. States where the phase is to be carried out.
Progress	% completed	Degree of completion of a planning element in percent. Numeric value between 0 and 100
WorkAmount	Amount of work	Amount of work done by the recipient resource for the planning element
ProjectStart	Project start	Start date of the project
StartDate	Start planning element	Start date of the planning element
EndDate	End planning element	End date of the planning element
PSPCode	PSP code	PSP-Code = Work Breakdown Structure code. Free text field for identification of phases and milestones in

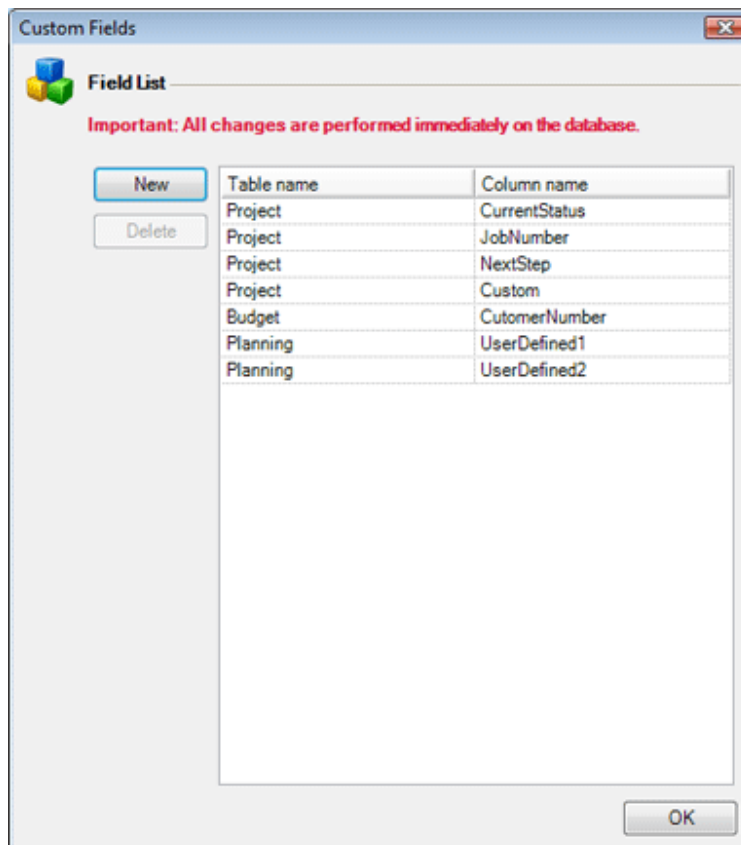
		large projects
ProjectNumber	Project number	Unique number identifying the project. The format of this number can be customized under InLoox Options
ProjectName	Project name	Concise, freely definable description of the project. The project name can be used for more than one project.
ProjectEnd	Project end	End date of the project
ProjectCategory	Project category	Category to which the project belongs
ProjectCompany	Project company	Free text field for the name of the customer in the project
ProjectPriority	Project priority	Priority of the project
ProjectState	Project status	Text naming the status of the project
ProjectNote	Project Note	Multiple-line free text for the concise recording and communication of the significant aspects of the project. The project note is input in Notes Area of the Manage Page.
IsProjectEndDateFixed	Fixed deadline project	Specifies whether the project has a fixed completion deadline.

DETAILED INFORMATION: CONFIGURATION: EDIT CUSTOM FIELDS

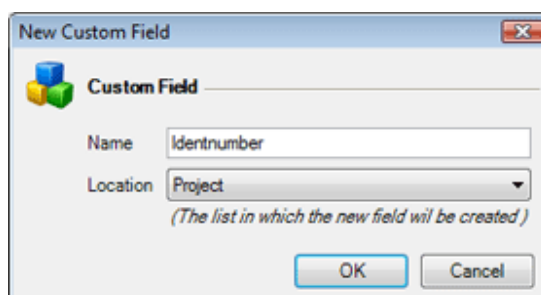
Custom fields permit you to expand the data model of InLoox to suit your own requirements. New fields can be created for the entire project or for one aspect of it: planning, activities, documents, budgets or assets. Field names are freely definable. InLoox supports text format only in custom fields.

Brief summary

1. Click on **Edit Custom Fields...** under **Tools** in the **InLoox Toolbar**
The dialog box **Custom fields** is displayed:




2. Click on the button **New**
The dialog box **New Custom Field** is displayed:



3. Input a **Name** for the new field
4. Select the intended **Location** of the field (i.e. which list)

5. Click on **OK**

Notes


 When a custom field is **deleted** all contents of it in all projects are permanently lost.

- Custom fields at **project level** are available on the **Manage** Page
- Custom fields for the list of **planning elements** are available in the dialog boxes **New Phase / Edit Phase, New Milestone / Edit Milestone, New Grouping / Edit Grouping**
- Custom fields for the list of **activities** are available in the dialog box **New Activity / Edit Activity**
- Custom fields for the list of **documents** are available in the dialog box **New Document / Edit Document**
- Custom fields for the list of **budgets** are available in the dialog box **New Budget / Edit Budget**
- Custom fields for the list of **assets** are available in the dialog box **New Asset / Edit Asset**

Customizing Report Templates

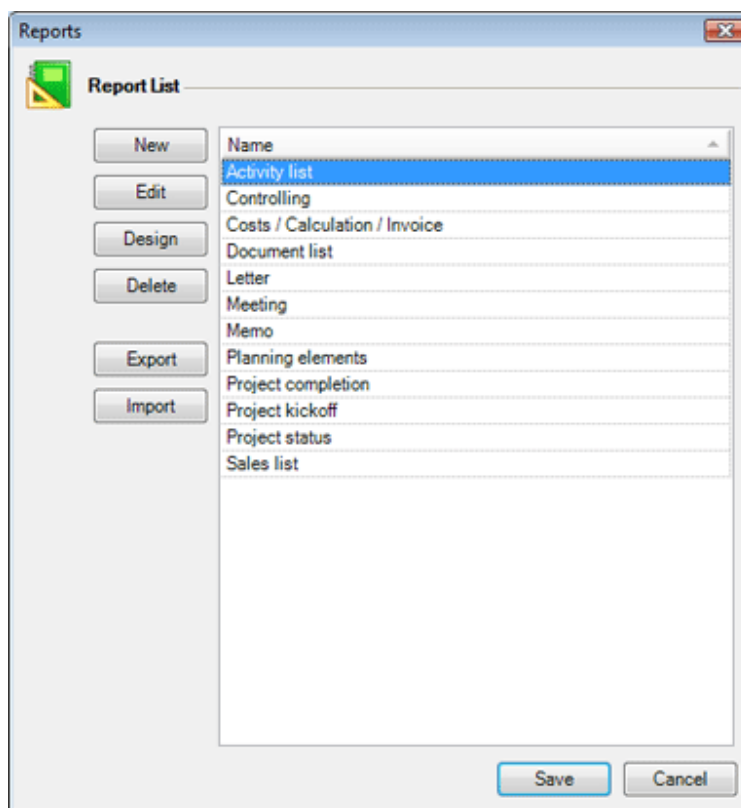
DETAILED INFORMATION: CUSTOMIZE REPORT TEMPLATES

It is possible for any user with the relevant permission to export any project via the InLoox Toolbar.

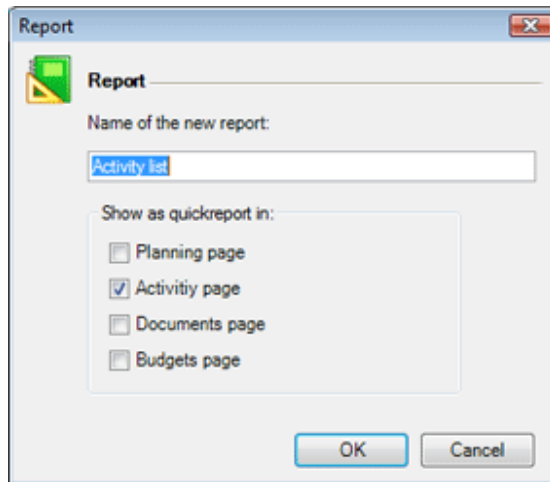
 A user requires read access to the **project data** to be exported plus permission for use of report templates. More information on this topic can be found in the chapter on **Permissions**.

A brief summary of maintenance of report templates

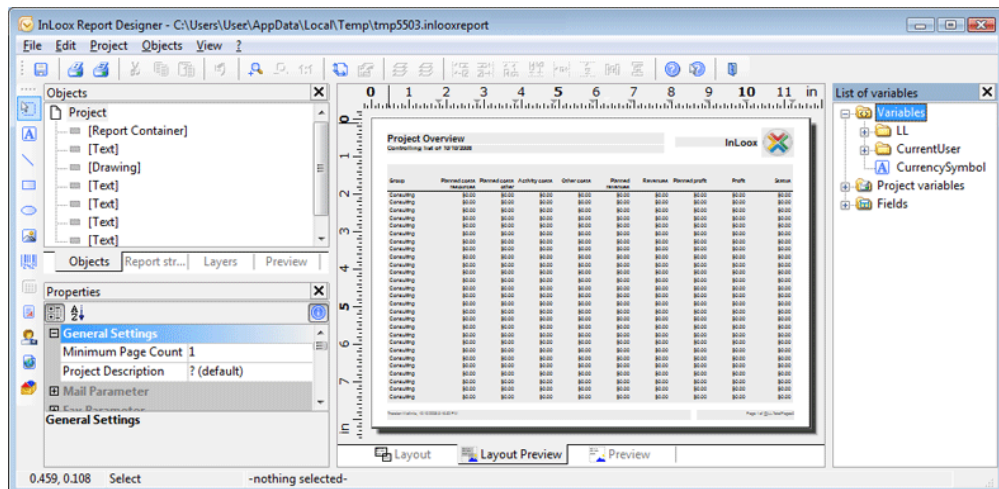
1. Click on **Edit Report Templates...** under **Reports** in the **InLoox Toolbar**
*The dialog box **Report List** is displayed:*



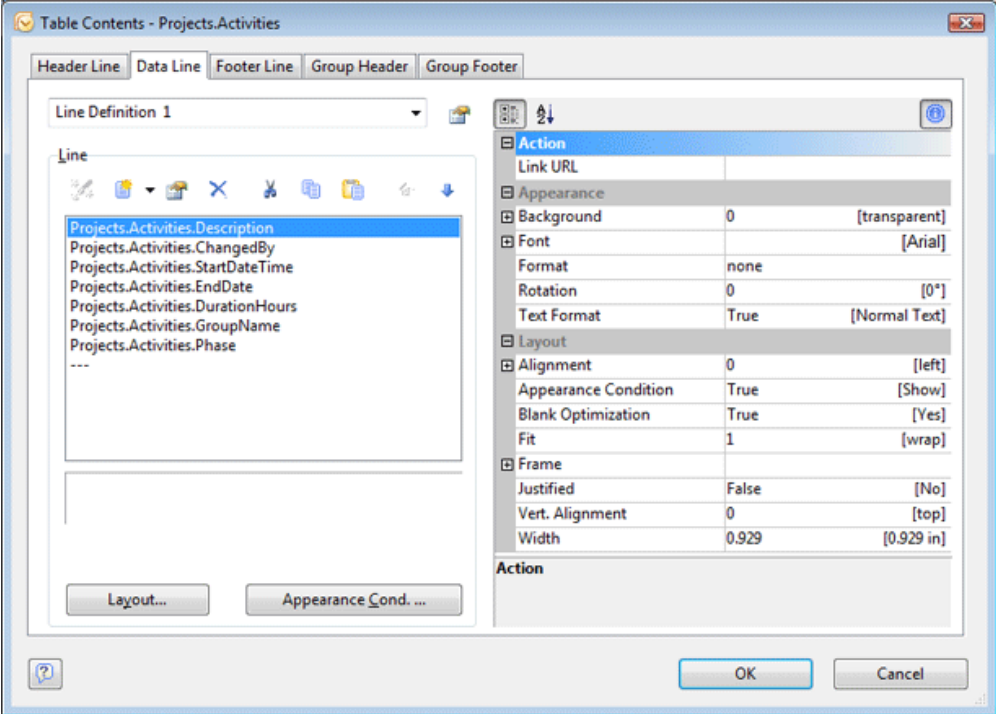
- Select a template and click on **Edit**
The dialog box **Report** is displayed:



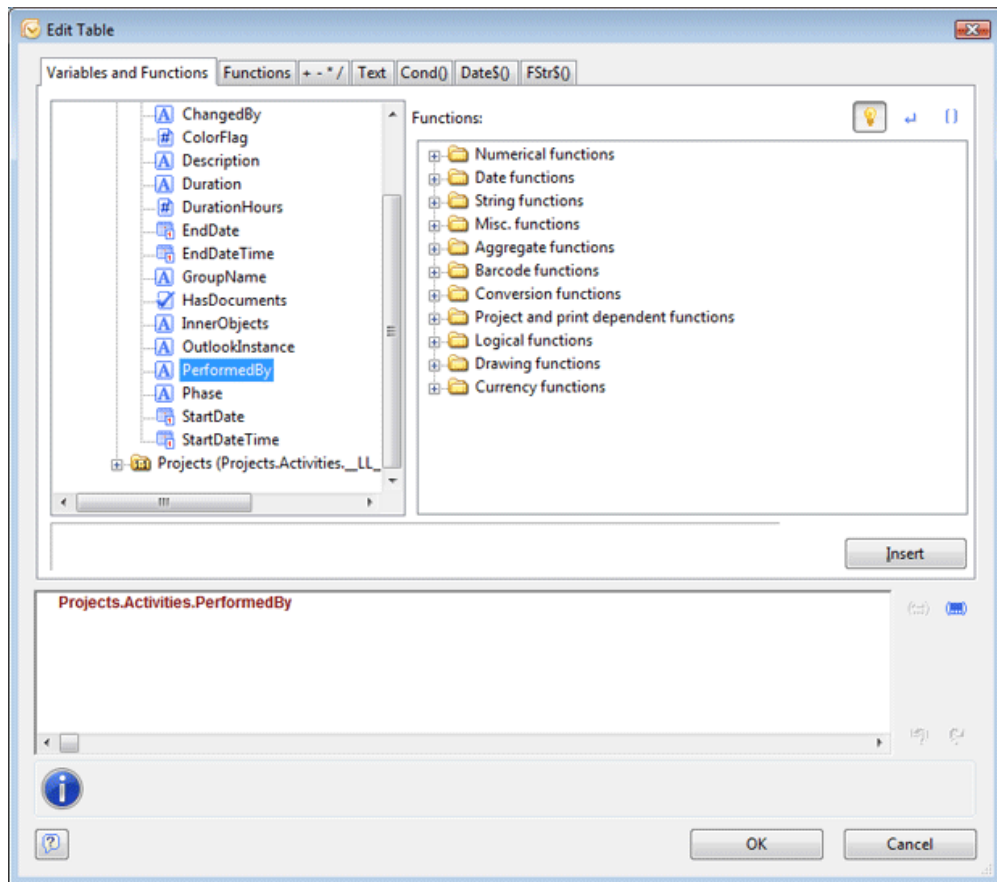
- Change the name as required and select project pages in which the template is to be used as the standard template
- Click on **OK**
- Click on **Design** in the dialog box **Reports**
The dialog box **InLoox Report Designer** is displayed:




- 6. The following gives an example of how to add an additional data column. In Report Structure click on **Table: Projects.Activities** under the **Table: Projects** (this is sorted numerically in the upper frame). The dialog box **Table Contents** is displayed:



7. Click on the symbol  **Insert column**
The dialog box **Edit Table** is displayed:



Select for example the field **Modified by** in the tree structure under **Fields >> Projects >> Activities** and click on **Insert** and then on **OK**

8. Click on the tab **Header** and then on the symbol  **Insert column**
9. Enter into the lower test field the text (including quotation marks): **"Modified by"**
10. Click on **OK**
11. Click again on **OK**
12. Click on **File >> Save**
13. Click on **File >> Close**
14. Click on **Save**
15. The template is now available systemwide in its modified form.

Notes

Details of the various **standard templates** can be found in the chapter on Detailed Information: Configuration: Types of Report Templates

A detailed instructions on the use of the InLoox Report Designer can be found in the chapter on

Detailed Information: Reporting: The Designer

Report templates can be exported or imported as files from other users. Further report templates can be found in **Download Area** of the **Support Center**

DETAILED INFORMATION: CONFIGURATION: TYPES OF REPORT TEMPLATES

The following templates are included with InLoox as standard:

Predefined template types:

Report template name	Usage in InLoox
Activity List	For exporting activities from the Activity page across all projects in the InLoox Project Overview
Planning Overview	For exporting planning elements from the Planning page across all projects in the InLoox Project Overview
Document List	For exporting documents from the Document page
Expenses / Calculations / Invoices	For exporting budgets of type Expenses / Calculations / Invoices from the Budget page across all projects in the InLoox Project Overview
Budget Overview	For exporting data from the Budget page across all projects in the InLoox Project Overview
Letter	Correspondence concerning the project
Meeting	Meeting organization document
Memo	Memorandum
Project Completion	Correspondence at end of project
Project Kickoff	Correspondence at start of project
Project Status	Outlook email with current project status
Turnover List	For exporting turnover lists from selected projects in the InLoox Project Overview via the InLoox Toolbar

The InLoox Report Designer

Introduction



Introduction

With the InLoox Designer, you can create or edit output forms which are used to present information taken either from a database or other data source.

The designer, print preview and export dialog are generally opened from within an application with a menu item (e.g. Configuration > Print > Labels or Output > Mail Merge > Labels).

See also:

▶ General

▶ Help Functions



General













The InLoox Designer considers output forms to be "**projects**". In a project, you will find all actual layout information, as well as the layout details including page size and orientation, fonts, colors, frames, circles, lines, pictures etc. if relevant to the project.

The InLoox Designer recognizes three types of projects - lists, labels, and cards (often complex label projects).

The individual elements of a project are called "**objects**". In this manner, a label project can, for example, consist of an object for the sender line, the address area, and the logo.

These objects contain the information required for printing such as the actual contents, fonts, alignments, word wrapping, colors, etc.

The InLoox Designer provides different types of objects which can be freely placed and changed in size on your workspace. Depending on its type, an object can display information or have various different properties.

	Texts: These objects can contain fixed text as well as the variable content of individual records. You can define the fonts, object orientation, and alignment of the contents.
	Rectangles: These objects are rectangular frames for which layout options such as frame width, colors, filling pattern and shading can be defined.
	Circles and Ellipses: Define Circles and Ellipses. Layout options such as frame width, colors and filling pattern can be defined.
	Lines: With this object type you can define lines with layout options such as line width and color.
	Picture Files: These objects allow you to integrate graphics into projects. These can be either fixed graphics (ex. a company logo) or variable graphics (i.e. different for each record).
	Barcodes: These objects allow you to display fixed text or variable contents as barcodes. You can define characteristics such as the type of barcode, color, text, and orientation.
	Tables (Lists): These objects allow you to display fixed text and variable contents from various records. You can define layout characteristics such as appearance, fonts, column widths and alignments, word wraps, footers, etc. Tables appear in list projects only.
	Formatted Texts: With this object type you can change the format within a line.
	Form Controls: Permits input and changes within the Preview.
	Charts: With this object you can create diagrams.
	Crosstab (Pivot Table): With this object you can insert a crosstab object and analyze and display different kinds of data in several dimensions.
	HTML Texts: With this object you can display the contents of web sites and other HTML formatted text. (see Chapter "5.3. Text Objects").



OLE Containers: Serves as a container for various OLE-Server-Documents. In this way, you can integrate documents created with Word, Excel, Visio or MapPoint into your project. See Chapter "5.13. Insert OLE-Server Documents" for more details.



Form Templates: These graphic objects can only be inserted by using **Objects > Insert > Form Template**. They are placed, as templates, in the background of the workspace and are used for the exact placement of objects. These templates are helpful in the design of complex forms. The form templates are exceptional in that they are not printed later.

You normally position the required objects in the workspace with your mouse, and then define the corresponding contents and layout properties. Alternatively, you can just drag a variable from the variable list per drag & drop, and place it on your workspace.

In order to edit an existing object you need to select it. Just click into the required object and the object will be selected. A selected object can be identified by its raised frame. When a new object is created, it is automatically "selected" and can be edited or changed immediately. The property dialog of an object can be activated with a double-click. Please be aware that the selection tool needs to be activated. See chapter Object Bar.

The following subchapters provide you with a summary of the methods and procedures to be used for the creation and editing of projects. The following is a typical sequence of steps in this procedure:

- Define the page layout
- Set preferences and options (only necessary once)
- Insert objects
- Edit objects
- Save the project

Help Functions



Help Functions

See also:

- ▶ Context sensitive help
- ▶ Online Help
- ▶ Tooltips for dialog controls



Context sensitive help

A context sensitive online help with comprehensive information about all the functions is available to you. You can open this directly with the "?" > Context sensitive menu. Alternatively, you can call up the help you need regarding a command or a dialog by pressing F1 where you need it. In dialog windows, there is also a help button at the bottom left corner. The online help regarding the relevant subject is opened with this. This context sensitive help is available for almost all commands and dialogs.



Online Help

Another way of finding information is to open the online help through "?" > Contents and then to use the search function to find the required topic.



Tooltips for dialog controls

Many dialogs and buttons have tooltips. These are small help texts, which automatically appear when you keep the cursor still over a dialog element.

General Methods and Procedures



General Methods and Procedures

This manual is divided into three sections. The first section is an introduction to the InLoox Designer and the functions which are available to you.

The second section describes in turn the commands which are available via the menu.

In the appendix you will find a description of the functions which allow you to manipulate strings and numbers.

But, to start, let's take a look at the layout and the individual tools.

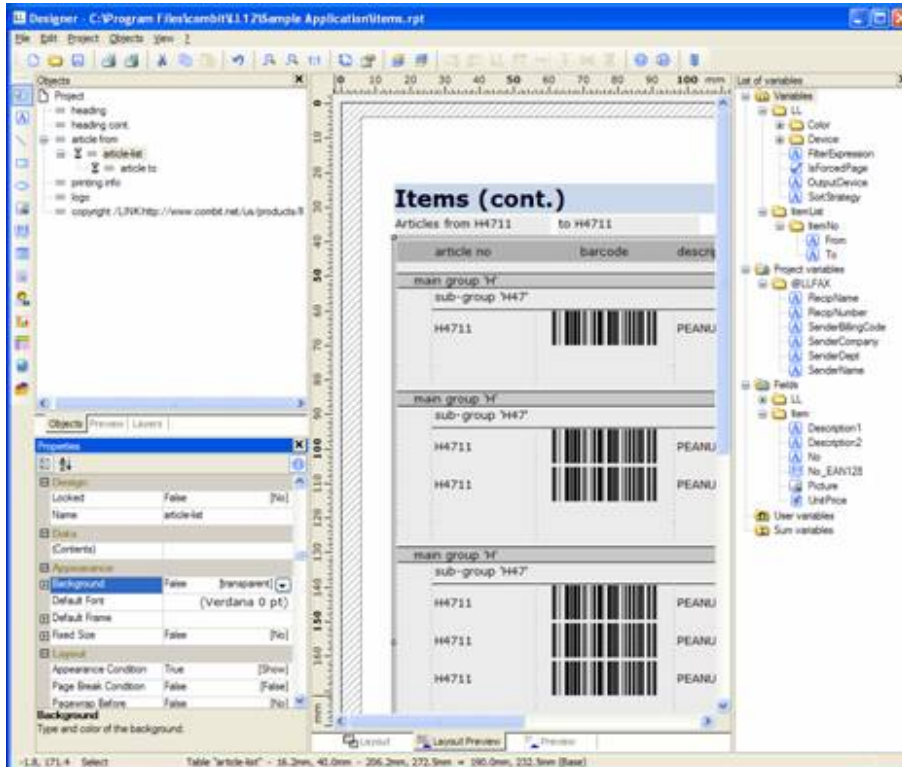
See also:

- ▶ [The Designer Interface](#)
- ▶ [Exiting the Designer](#)
- ▶ [Variables, Formulas and Expressions](#)
- ▶ [Working with Functions](#)
- ▶ [Operators](#)
- ▶ [Working with Sum Variables](#)
- ▶ [Working with User Variables](#)
- ▶ [Using Filters](#)

The Designer Interface



The Designer Interface



See also:

- ▶ Dockable and Floating Tool Windows and Toolbars
- ▶ Object Bar
- ▶ Toolbar
- ▶ Context menu
- ▶ Status Bar
- ▶ Workspace
- ▶ Variable List
- ▶ Layers Window
- ▶ Objects Window
- ▶ Table Structure
- ▶ Preview
- ▶ Properties Window
- ▶ Using the Keyboard

▸ Drag & Drop

Dockable and Floating Tool Windows and Toolbars



Dockable and Floating Tool Windows and Toolbars

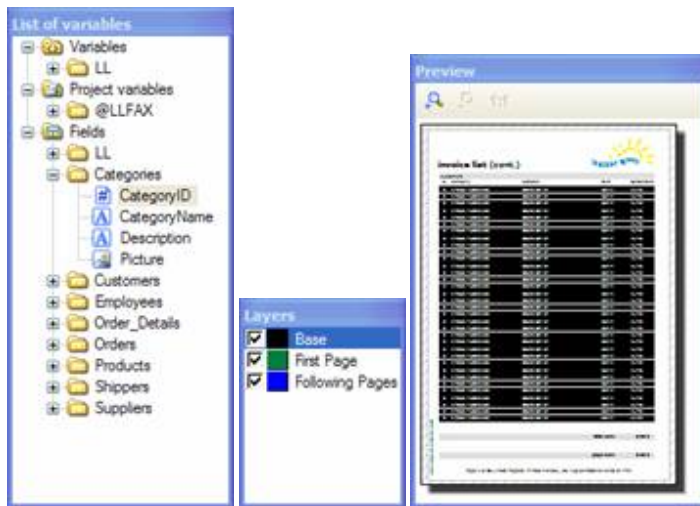
See also:

- ▶ [Tool Windows](#)
- ▶ [Toolbars](#)



Tool Windows

You can freely define the way space is partitioned in the InLoox Designer. The windows with the most importance for the design of your layouts are the "tool windows". Tool windows allow themselves to be either integrated into the Designer window or opened as independent dialogs that stand as single windows on the desktop. The workspace assumes a special function, it is the only window that is constantly visible and is attached to the Designer window. The other tool windows, for example the Property List or the Object List, allow themselves to be docked to any part of the workspace.



Multiple tool windows can be docked together and, by using the tab strips, brought to the foreground.



To do this, select the tool window to be moved by depressing and holding the left mouse button in the title bar. You can now drag the tool window to any desired position. A rectangular frame will be presented which shows the position and size at which the tool window will be placed. If you drag it into the title bar of a previously docked tool window, it will be placed behind the window(s) at this position. If it is dragged into the upper portion of a previously docked window, then the position will be shared and the newly docked window will be in the upper portion. If you drag it into the lower portion of a docked window then the position will be shared and the new window will be in the lower portion. The same is true for the left and right portions of the (docked) tool windows.

If you place a tool window in a different position, it will not be docked but will be a movable "floating" window.

The workspace has the behavior of a previously docked window, with the differences that it cannot be selected and moved and other windows cannot be docked behind it.

Tip: When a tool window is dragged away from its position, it can be returned to that position but there will be no partitioning. To repartition, the window must first be placed in another position and then returned to share the space with its "colleague".

To set the size relationships of the docked windows, you can place them on the borders of their neighbors and adjust the size using the mouse. The position will then be partitioned anew. This functions in both the horizontal and vertical directions.



Toolbars

Both of the Designer's toolbars can be docked onto the four edges of the Designer window or presented as freely movable (floating) windows. Click with the mouse either in the narrow area at the left or top of the appropriate toolbar, or in the title bar of the toolbar if it is presented as an independent window.

Tool windows and toolbars can be turned on/off by using the command **View > Windows >...**

Tip: Preferences, such as window position, size, display, etc. will be globally saved for every application InLoox is integrated into. They are then valid for all InLoox projects of the same type (lists, labels or file cards).



Object Bar

Some of the tools available in the Designer can be accessed via the button bar. With a mere button click you are offered a direct short-cut option.

These buttons are self-explanatory: if you remain on the button for a short time without pressing a mouse key, a tool tip appears. This bar can be placed/removed by choosing **View > Windows > Toolbar 'Objects'**.



Toolbar

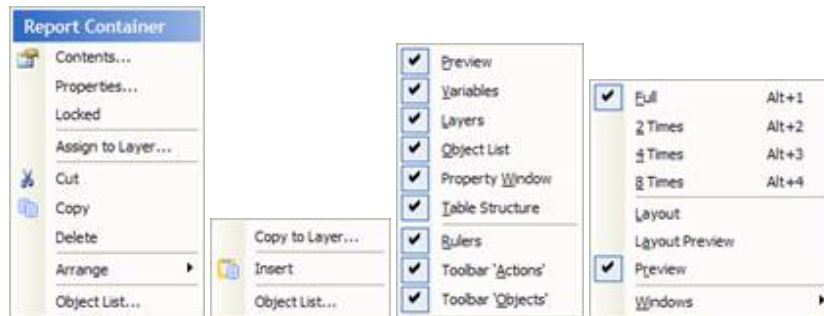
In the same manner, menu items can also be directly selected via the toolbar (as a shortcut). Just click on the button you require.





Context menu

The most important commands that are related to an object can be activated via a context menu. The title bar contains the object's name and type.



By clicking with the right mouse button in the margins, a small context menu opens which can be used for the quick opening of the Object List dialog.



Status Bar



The status bar is divided into three sections:

- the left area indicates the current mouse position in millimeters or inches from the upper left workspace corner.
- the middle area indicates the current mode of operation. (for example, select, draw rectangle, etc.)
- the right area shows the name or type, relative appearance level, as well as the size of a selected object.
- the margin between the object's upper left corner in relation to the same corner of the workspace
- the margin between the object's lower right corner in relation to the same corner of the workspace

Workspace



Workspace

The workspace is the area in which objects can be changed and defined. The shape and size of the workspace depends on the default values of the paper size and alignment (see: **Project > Page Setup**).



The entity of all objects on the workspace and its corresponding layout are called a project. InLoox distinguishes between list projects (list/table creation), card and label projects (label creation).

See also:

- ▶ View Modes
- ▶ Options in the view mode



Rulers and Scale

The rulers form a frame around the workspace. The position of the mouse is displayed on the rulers with the use of markers. You can always see the coordinates of the mouse, which are additionally displayed in the Status Bar.

The rulers can be turned on/off with the menu item **View > Windows > Rulers**.

To ease the entry of data and objects within the workspace, guides can be used in a project. Depress the right mouse button while on one of the rulers, drag into the workspace and let go. The new guide then has the same alignment as the ruler. All guides allow themselves to be relocated, and a snap function assists you in the exact placement of objects. The objects are not permanently attached to the guides; the guides only provide assistance in the placement.



The guide options are defined with a context menu. You can set the "catch range" for each guide in pixel, and the objects will automatically be pulled to the guide when they enter the set catch range.

You can make the guides non-relocatable so that you do not accidentally move them within the workspace. The snap function is turned off when you depress the Ctrl-key while placing objects.



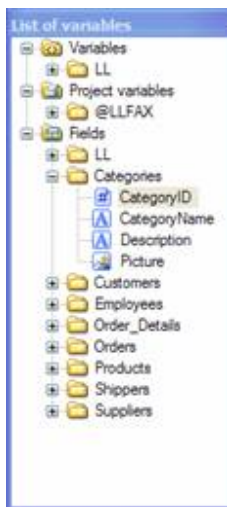
Variable List

The Variable List displays all variables which are available in the current project; for list type projects, all available fields are additionally displayed.

Fields, variables, and internal InLoox variables are distinguished in the hierarchical list. Fields contain the data that changes from line to line in a table object, while variables usually only change from page to page.

If you wish to assign variables or fields to existing objects, you can simply drag the variable from the list and drop it on the respective object. InLoox does the pasting for you (drag & drop).

If you drag a variable to a free area in the project workspace, a new text object is automatically generated.





Layers Window

The Layer Window shows the various layers or levels of a project. This window can be repositioned on the workspace at your will.

You can improve the overview in complex projects by assigning objects to an individual layer. You can switch layers on and off at any time by using the Layers Window. You can give these layers their own appearance conditions. For example, one layer may only be valid for the first page of a multipage project, and the second layer for the remaining pages.

More detailed information on working with layers can be found in Chapter Working with Layers.





Objects Window



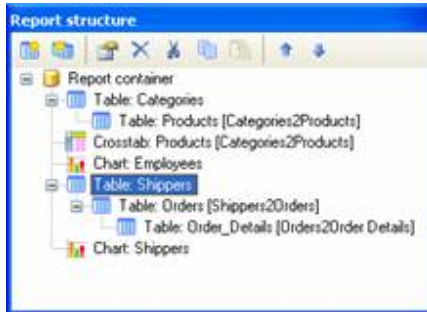
Another tool window is the hierarchical Objects List. All objects in the project are displayed with a small rectangle and its name in the sequence that they will be printed. The name can be edited by clicking on the current name. The most important commands for the objects are contained in the context menu or in the workspace. Objects that are in a hidden layer have parentheses around the rectangle in front of their names. Locked objects are identified by a small X.

The sequence of the objects can be changed by pulling an object with the mouse into another position in the hierarchical list. If the Shift-key is depressed, the object will be attached to the object at that position, changing the hierarchy of the objects.

Tip: The special dependence of the objects upon one another, which is very important for printing, is displayed hierarchically. Further, detailed information is contained in Chapter .



Table Structure



The fifth window is the hierarchical table structure, which is only available in some project types. All tables and their respective sub-tables of a table object are displayed with their table name, sort order and relation information in the order in which they will be printed. The most important commands for the various tables are available through context menus in the workspace, and a toolbar.

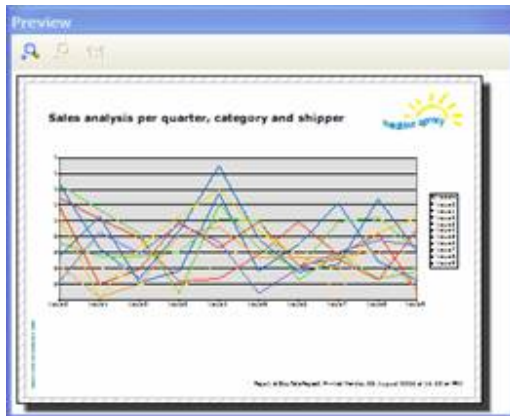
Using the buttons in the tool window, you can

- Attach a new table or sub-table
- Delete, cut, copy and paste tables
- Change the order of the tables



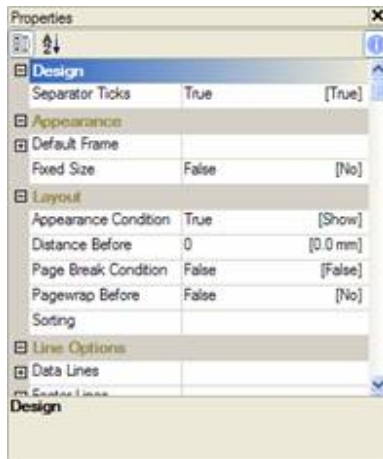
Preview

The Preview Window is available for you in order to check the layout of your workspace. Click in the window to change between full size and normal window size. The size of the Preview Window can be changed by dragging the frame. These settings are stored globally for the project type, and are therefore valid for all InLoox projects of the same type. You can select an area to enlarge by dragging a rectangle. The zoom modes in this preview are independent of the zoom mode in the workspace. Alternatively, you can change the zoom modes by using the buttons in the toolbar.





Properties Window



The properties of the individual objects are displayed in this tool window, the Properties Window. The properties are sorted, using the appropriate method, by category. Each category has properties that can be combined into groups. Categories and property groups can be, to improve view, opened and closed. It is also possible to abstain from the use of the categories, and display all property groups alphabetically instead.



The sorting method is set using this button. You can sort either by "category" or "alphabetically".

A good example for a property is the position and size of an object. This can be defined in the **"Layout"** section of the Properties Window or in the workspace. The position of an object is defined by the properties of the x- and y- coordinates of the upper left corner, the object width and object height. You can define the size of an object in the Properties Window if you do not wish to do so by using the mouse

To edit a property, click in the value column. When standard values are used, the input of the new value is accomplished using a combo box.

An additional dialog is available for some property groups that eases the input of the property. You can open this dialog by either selecting the property group and depressing ENTER or clicking on the button

It is also possible, for almost all properties, to enter the value as a formula. To do this, click during the input of the value on the combo box entry "Formula". For values that can be entered directly, click on the button and a formula dialog will open. You will find a detailed description of this function in Chapter Variables, Formulas and Expressions.

Below the property list, a short description of the selected property is displayed. This function can be turned on/off by using the button.

Using the Keyboard



Using the Keyboard

The most important functions of the InLoox Designer can be activated by using the keyboard. Here are a few of the most important key combinations:

See also:

- ▶ Tool Window
- ▶ Properties

*Tool Window*

A key combination exists for every tool window. The window will be activated, or if it is docked behind another window, it will be brought to the foreground.

Tool Window	Shortcut
Workspace	CTRL+1
Variable List	CTRL+2
Layers	CTRL+3
Objects	CTRL+4
Preview	CTRL+5
Properties	CTRL+6
Table Structure	CTRL+7

*Properties*

You can also work with key combinations within the property Lists.

Function	Shortcut
Change to next property or header	Cursor down
Change to previous property or header	Cursor up
Open category	+
Close category	-
Open all property groups of a category or sub-groups of a group	*
Edit property	Tab
End editing	Shift + Tab
Open combo box	Ctrl + F4 (in Edit mode)
ENTER	Depends on value: open content dialog, invert Yes/No, open combo box



Drag & Drop

The InLoox Designer is equipped with a broad range of interesting drag & drop functions, simplifying the project design process. It is possible (see above) to add new contents to existing objects by drag & drop, or create new objects in a free area of the project workspace. This system was also integrated into many dialogs: you may add new contents to the property dialogs of text- and table objects or move existing contents easily with the mouse.



Exiting the Designer



Select **File > Exit** to end the InLoox Designer session. If your layout definition has been modified since you last saved, you'll be prompted to save the file.

Variables, Formulas and Expressions**Variables, Formulas and Expressions**

Information can be inserted into your project in two ways, by entering "**fixed text**" or using "**fields**" and "**variables**".

Information can be inserted directly into the project as "**fixed text**", e.g. a sender line on an address label or a column heading in a list. Fixed text is printed exactly the way you enter it into the project.

Information coming e.g. from a database is inserted into the projects as "**variables**" or "**fields**". Fields are the information in a table that changes from line to line, and variables the information that only changes from page to page. In this manner you can, for example, select the variable TELEPHONE for the contents of a list column. The various different telephone numbers of the database records will then be printed in this column. Variables take the place of information from a database, they're placeholders.

With these two types of information attractive projects can be designed which are sufficient for many purposes. The InLoox Designer, however, offers much more. By using formulas and expressions the information contained in variables and fixed text can be linked and even edited. To help you with this there are "**formulas**" (for calculations with numbers) and "**expressions**" (for the combination of text and numeric values and for logical conditions). In formulas and expressions you can insert fixed text and variables in "**functions**" and link them via "**operators**".

In the case of projects for printing address labels you can, for example, add the text "PO Box" automatically for a PO Box number saved in a variable POBOX by an expression. In this case (formula "PO Box " + POBOX) you wouldn't just have the bare PO Box number on the label but "PO Box 11 11 11".

Or, imagine you have the net prices of articles in a variable PRICE, but you actually wanted the gross prices incl. VAT (sales tax) to be printed. Here you can use a formula which calculates and adds the VAT onto the net price. Of course it is the gross price which is then printed.

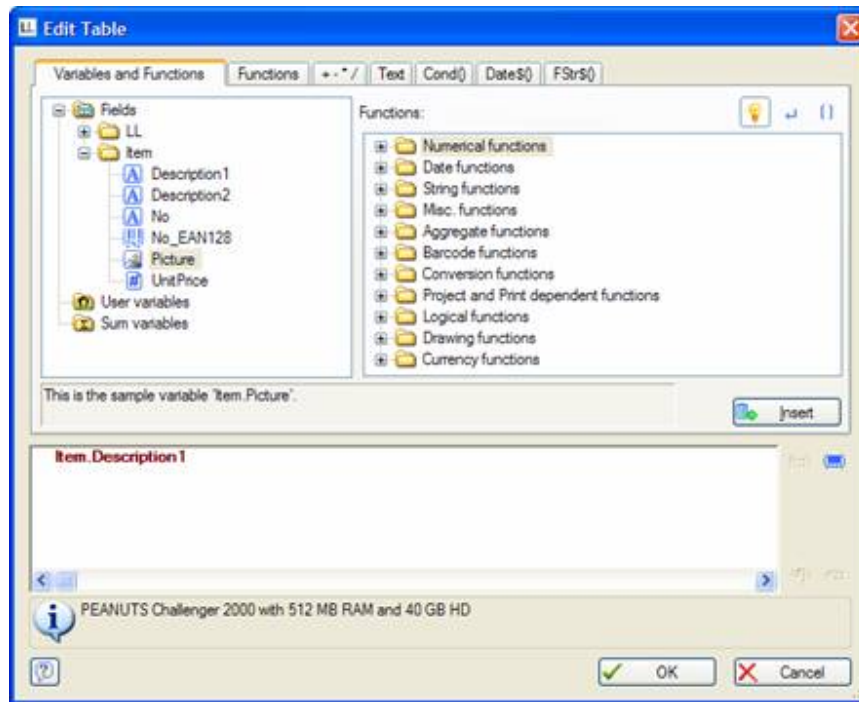
See also:

- ▶ The Elements of an Expression
- ▶ Insert variables
- ▶ Insert fixed text

The Elements of an Expression

*The Elements of an Expression*

Fixed text, variables, formulas, functions, links etc. - all fall under the general name "elements of expressions". They can all be inserted and combined via the same dialog. This dialog contains an assistant who supports you in selecting the correct syntax, provides explanations, and help.

**See also:**

- ▶ Input Enhancements of the Formula Wizard
- ▶ Expression Modes
- ▶ Register Cards
- ▶ The Expression Field



Input Enhancements of the Formula Wizard

The formula wizard supports you with various input enhancements that can be (de)activated under **Options > Formula Wizard**:




- **Show Function Syntax:** if this option is selected, a tool tip appears in the formula assistant that describes the selected function, lists the necessary parameters and displays the result types.
- **Autocomplete for Functions:** if this option is activated, after entering 2 characters, all available functions that begin with those 2 characters will be shown and can be selected. This expedites the entry of the function.
- **Autocomplete for Parameters:** the assistant recommends values based upon the available variables and fields.
- **Syntax Coloring:** functions, parameters and operators are displayed in different colors. This will improve the transparency in complex formulas.
- **Automatic Type Conversion:** if this option is activated, variables and fields will be automatically converted at the time of entry of the expression so the type of data conforms to expectations.

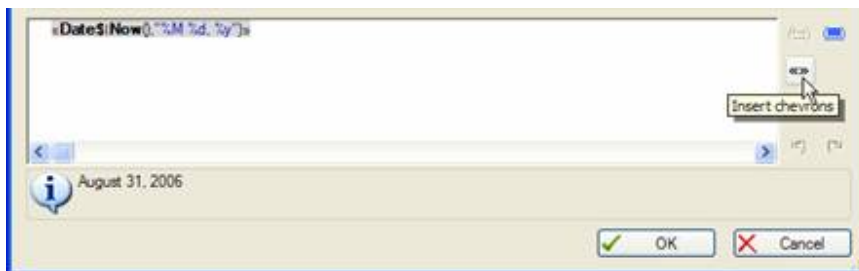


Expression Modes

Please note that there are two possible modes for expressions:

On one hand there is the normal expression mode, where variables and functions can be used without brackets or chevrons. Fixed text must be framed by quotation marks. Variables may be combined with the "+"-Operator.

 On the other hand there is the extended mode, where fixed text may be stated as is without quotation marks. Variables are framed by "<" and ">" and functions are framed by chevrons "«" and "»". The chevrons can be inserted by clicking the button. The combining of variables with the "+" operator is not necessary. This mode is easier to use.





Register Cards

The dialog consists of a row of cards, each containing different editing elements.

Card	contains the elements
Variables and Functions	the variables and functions available for this object type
Function	a list of the functions available
+ -*/	a list of the available link operators
Text	a dialog for the entry of fixed text
Cond()	a special dialog for the definition of IF-THEN-ELSE conditions
Date\$()	a list of the available date formats
Fstr\$()	a list of the available number formats
Tab	the setting possibilities for tabs (only available in text objects)

On each of these cards you will find an **"Insert"** button with which you can insert the selected element into the expression field. You can also perform this by double-clicking or using drag & drop.

There are special rules for the syntax and linking of various individual elements of an expression (variables, text, functions, etc.). For this reason you should always insert the various elements into the expression field via the relevant card of this dialog. In order to insert variables you should use the **"Variables and Functions"** card, to enter text the **"Text"** card, etc.

Experienced users may wish to enter the expression directly into the expression field or to edit the expression (e.g. place brackets).



The Expression Field

The expression in the expression field is constantly checked during its "creation" for correct syntax. Any syntax errors are displayed in the info field beneath the input field, along with a hint as to the cause of the error. As long as the expression is incomplete the check routinely displays at least one syntax error. Once the expression is complete, however, and an error is still displayed, then the expression really does contain an error which you should correct.



To simplify more complex expressions, you may divide them into multiple lines. This does not affect the result.

The three buttons next to the input field are used to

- Mark the brackets belonging to the formula expression.
- Select the whole expression framed by a pair of brackets.
- Undo the last step.



Insert variables

The variables are placeholders which will later be filled from the application when configuring projects. The value type "String" (Text), "Number", "Date", "Boolean" (logical values), "Drawing", "RTF" and "Barcode" is important as soon as you want to use variables as parameters in functions, because usually only certain value types can be used as parameters. You can, for example, only multiply a numeric value with a numeric value and not with a picture.

The "**Variables and Functions**" card contains a list of the variables which are available for the current object, including the data type in the form of an icon in front of the variable and the available functions.

Double-click (or use drag & drop) on the variable you'd like to transfer to the editing line.



The required variable is then transferred to the editing line with the correct syntax.

To include further variables in your expression just repeat the steps described above. If spaces should be between the individual variables, for example to separate FIRSTNAME and LASTNAME, then don't forget to enter these spaces in the editing line also:

FIRSTNAME + " " + LASTNAME

You may also insert variables by dragging the required variable to the object on the workspace where it should be inserted. The variable is then added automatically to the object as a new line.

Insert fixed text



Insert fixed text

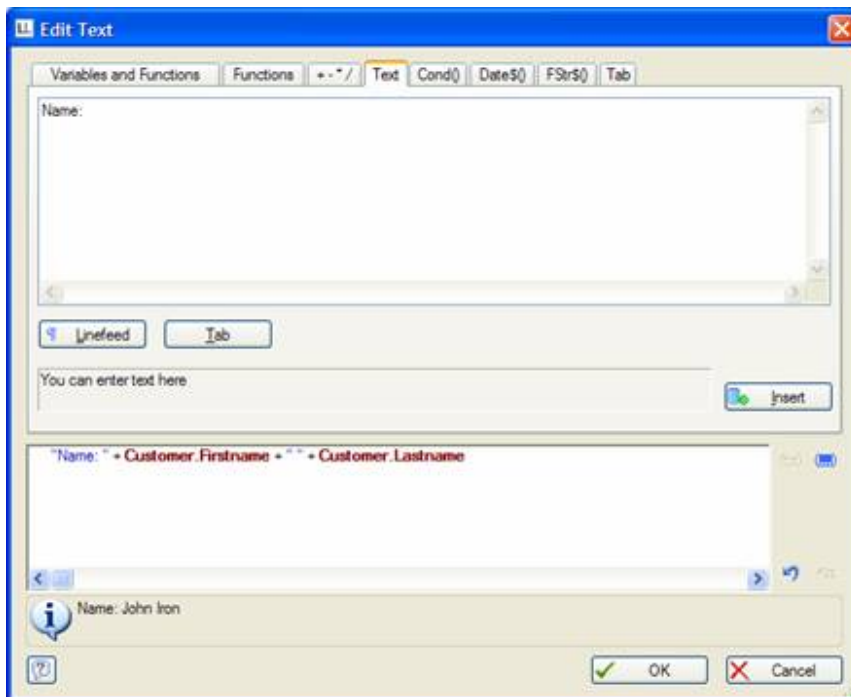
Another very important element in expressions is fixed text, for example as prefix for variables like

"Phone Number " + PHONE

which will print:

Phone Number 1-555-123-456

The card "**Text**" offers an easy way to insert text automatically, set tabs and set line breaks.



Enter the text and click on the "**I**nsert" button to insert the text into the expression below. The text will be inserted automatically, depending upon the requirements, either in quotation marks (for function expressions) or without (for text expressions). For this reason you should always enter text using the "**T**ext" card.

In this example, the fixed text "Name: " was entered using the "**T**ext" card, and then the variable Customer.Firstname and Customer.Lastname using the "**V**ariables and **F**unctions" card. The text "Name:" will be printed first followed by the appropriate Firstname and Lastname from the database.

Please note that spaces, for example separators between variables or between variables and text, are considered to be fixed text.

See also:

- ▶ Inserting Linefeed
- ▶ Inserting Tabs



Inserting Linefeed

 **Linefeed** To insert a linefeed, click the button "**Linefeed**". The linefeed is represented by a special character.

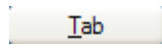
Linefeed are only active for those objects (a line in a text object or a column in a table) for which line breaks are set. In this way, words that do not fit into the line/column will be broken into the next line and all following text will be moved down. Please note that if the text doesn't consist of a number of words, but of a long word it will not be wrapped, but clipped.

The value for "Line Wrap" in the "Layout" category of the properties for the text object must be set to "True" for the appropriate paragraph.

For tables, the value for "Line Wrap" in the "Layout" category of the properties must be set to "True" for the appropriate column.



Inserting Tabs



Tabs are only available in text objects, thus the button will not appear in fields of table columns.

Only one tab can be inserted for each line. Its position and alignment can be adjusted using the card "Tab". For more information please refer to Chapter Inserting Text Objects.

Working with Functions



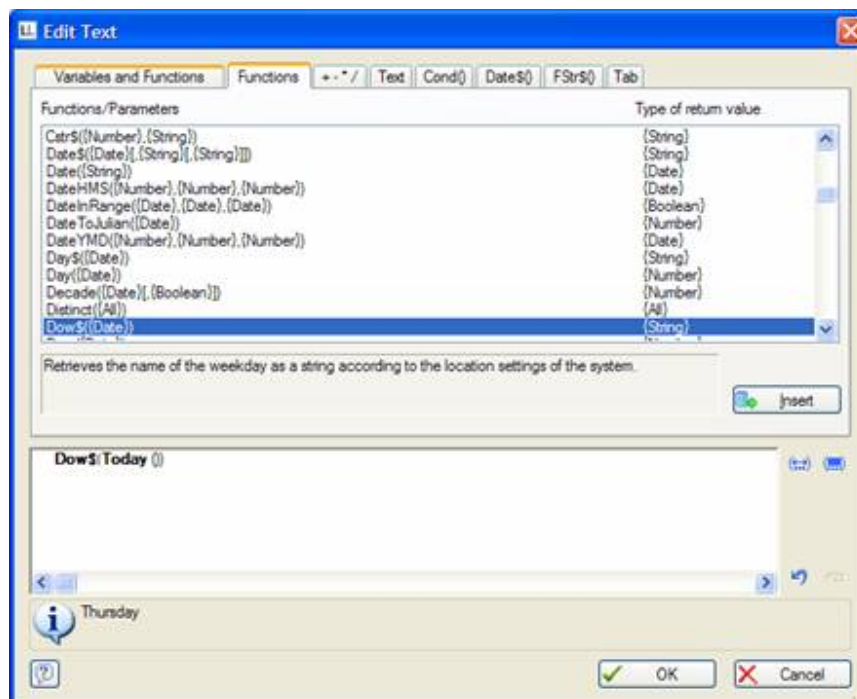
Working with Functions

The built-in functions offer flexibility in defining expressions. Functions allow you to change the representation of fixed or variable text or numbers, recalculate and modify values and to set a display format for these.

You'll find a list of available functions and their parameters on the card "**Variables & Functions.**" A detailed description of all functions and parameters can be found in the Appendix.

The functions are displayed in the selected order. You may select to sort them by

- function group (e.g. "Numerical Functions", ...)
- type of return value (e.g. "Numerical Value",...) or
- type of the first parameter (e.g. "String",...)



In this example, the user clicked the "**Insert**" button for the "dow\$()" function which returns the day of the week of the date that is passed in the parameter of the function, ex. "Thursday".

The function is inserted in the correct syntax (with chevrons, etc.) into the function expression field. Also inserted are place holders for the parameters which the function expects/allows. You'll be asked to replace the place holder with a valid value. It is recommended to set all values for the parameters of your function before you continue with the definition of the expression.

You can also use functions for some parameters. For example:

```
dow$(Today())
```

This will print the current day.

To insert a variable and a function simultaneously, drag the required variable on the required function folder (e.g. "Numerical Functions"). The folder will be opened automatically and you can select the desired function. If you drop the variable on a function, this function will be inserted into the editing line with the selected variable as first parameter.

See also:

- ▶ [Function Syntax](#)
- ▶ [Value Types](#)
- ▶ [Examples for the Use of Functions](#)
- ▶ [Insert logical condition](#)
- ▶ [Formatting Numbers, Dates and Currencies](#)



Function Syntax

The functions all use the same syntax, and look quite like those of the programming language BASIC:

Result = **Function(Arguments)**

Only the functions and arguments are entered. Upper or lower-case has no meaning in the function name, but is very important for the arguments, especially when using variables as arguments.

InLoox evaluates the expression and replaces the Function(Arguments) with the "return value".

This means, when you enter a

Function(Argument)

the

Return value

is generated.

Definitions:

Element	Description
Function()	The name of the function in its correct syntax. The parentheses for the arguments are a part of the function name. Even if the function contains no arguments, the parentheses are required.
Arguments	Values used in the expression to calculate the return value. The arguments are entered in the parentheses without spaces. A function can have no, one, or multiple arguments. Often, functions require arguments of a specific value type (see below). It is important that the argument has the required value type.
Return value	The value InLoox calculates from the function and the arguments. The value type that is returned is dependent upon the value type of the function and argument.



Value Types

Type	Meaning
BOOLEAN	Logical values TRUE or FALSE. If the condition is met, the value is TRUE, otherwise FALSE.
String	Any combination of letters and numbers. If this is used as fixed text, it must be in single or double quotation marks so that they can be distinguished from variables.
Date	A number representing the date using a Julian calendar.
NUMBER	A string that consists of the digits 0-9, the decimal point and the minus (-) sign. Other characters are not allowed. Strings of this type need not be enclosed in quotation marks ("").
Barcode	A string used as barcode text.
PICTURE	A supported graphic format.
RTF	A formatted text

Examples for the Use of Functions



Examples for the Use of Functions

The available functions are listed in the "Function" dialog page of the formula wizard along with a short description of their parameters and usage. Also displayed is the type of argument(s) (parameters) that is/are expected by the function. If no arguments are displayed for a function, then no arguments, except the empty parentheses, are expected. Otherwise, the function expects exactly the same number of arguments that are displayed. Arguments that are displayed in brackets ([]) are optional.

The argument type "**ALL**" means that the argument can be of any type, **SAME** means that this argument must be of the same type as the ALL parameter.

See also:

- ▶ The function "FStr\$(NUMBER, STRING)"
- ▶ The function "LastPage()"
- ▶ The function "Left\$(STRING, NUMBER)"



The function "FStr\$(NUMBER, STRING)"

"FStr\$(NUMBER, STRING)" formats a numeric argument (NUMBER) using the format string (STRING). It returns a string with the formatted number.

The format string can contain the following characters:

Format	Meaning
*	number or '*'-Prefix
\$	number or '\$'-Prefix
-	number or sign (when numerical argument negative)
+	number or sign
(number or '('-Prefix (when numerical argument negative)
))-Postfix (when numerical argument negative)
#	number or space
&	number or '0'
.	decimal point
,	1000-comma or space

The 'or' part will be taken when the number is too small to fill the position of that format character.

A prefix is a character which is written in front of the number. The formula FStr\$(1, "****") has "****1" as result. In case of FStr\$(100, "****"), the result would be "100". A postfix is put behind the number.

As an example, assume you want to format the number of software products you're selling and that number would be in the variable QUANTITY.

Fstr\$(QUANTITY, "#####&")

formats the number to 6 significant digits. Every place except the smallest can be blank if the number is too small.

Value	Result
0	" 0"
1	" 1"
255	" 255"

Imagine that you have the price of that software in PRICE and you need it with two decimals (rounded):

Fstr\$(PRICE, "#####&##")

Value	Result
999.55	" 999.55"
1100	" 1100.00"
1099.5	" 1099.50"

You want the total price? No problem:

FStr\$(QUANTITY*PRICE, "\$\$, \$\$, \$\$\$, \$\$\$&.#")

We use the '\$' here to show this feature:

Value	Result
2*999.55	" \$1,999.10"
1100	" \$1,100.00"
100*1099.5	" \$109,950.00"

Some additional examples:

Formula	Result
FStr\$(3.142, "#.###")	"3.142"
FStr\$(3.142, "#####")	"*****" (overflow!)
FStr\$(3.142, "(&.###)")	" 3.142 "
FStr\$(3.142, "(&.###)")	"(3.142)"
FStr\$(3.142, "+++&.###")	" +3.142"
FStr\$(3.142, "--&.###")	" 3.142"
FStr\$(-3.142, "---&.###")	" -3.142"
FStr\$(3.142, "&&&. &&&")	"003.142"
FStr\$(3.142, "****.****")	"***3.142"
FStr\$(3.142, "\$\$\$.\$\$\$")	" \$3.142"
FStr\$(5003.1, "#.###.&&")	"5,003.10"
FStr\$(3.142, "##&.****")	" 3.142"



The function "LastPage()"

"LastPage()" returns TRUE if the current page is the last or FALSE if it is not. LastPage() has no arguments, still the parentheses have to be written to declare it as function usage.

As example we assume you want to have a 'sum' line at the bottom of a page which displays the current subtotal or total:

```
If(LastPage(),"Subtotal: ","Total:")+ FStr$(SUM,"$$$$$$&##")
```

Note that objects using LastPage() in their appearance condition have to be linked to the table object.



The function "Left\$(STRING, NUMBER)"

The function "Left\$(STRING, NUMBER)" returns the first NUMBER of characters of the STRING.

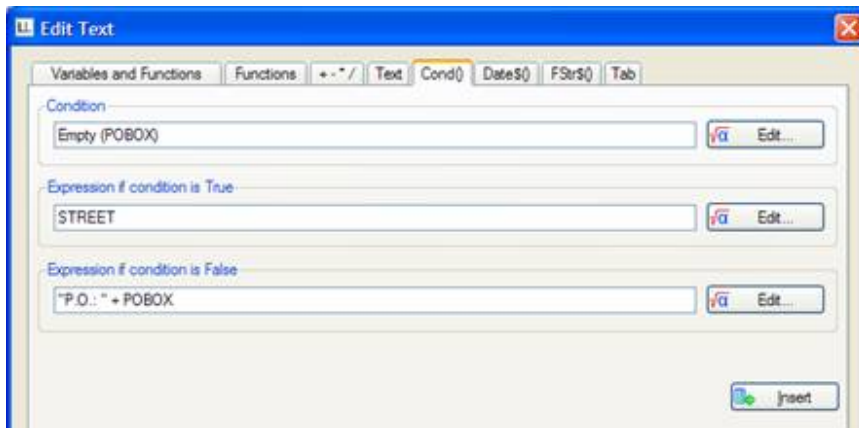
Formula	Result
Left\$("combit", 2)	"co"
Left\$("combit", 10)	"combit"



Insert logical condition

Another special function is the "Cond()" function. It represents an "IF - THEN - ELSE" condition: if the result of the expression in the first parameter is true, then the result of the second parameter will be returned, otherwise the result of the third parameter is used.

Let us assume that your data base contains both house and post office box numbers, and that you would like to print address labels using this data. Naturally, only the street address or the post office box number should be printed, but not both. You decide to use primarily the post office box number and only to use the street address when the post office box number is not available. With the help of an IF-THEN-ELSE condition, this will be no problem:



Enter the condition to be evaluated, or a Boolean variable, into the condition field. Enter the "true" part into the second line, and the "false" part into the third. Note that the "Edit" button starts an additional assistant to help you edit the appropriate part. In our example, we used the function Empty() to evaluate if the POBOX field is empty. When you press "Insert", the parts will be wrapped into the "Cond(...)" function and inserted into the expression line below.

In the field "True", enter the expression to be used if the entered condition is TRUE. If nothing should be done, enter two consecutive quotation marks ("").

In our example, the condition is true if the POBOX field is empty, and in this case the STREET should be printed.

In the field "FALSE", enter the expression to be used if the entered condition is FALSE. If nothing should be done, enter two consecutive quotation marks ("").

In our example, the condition is false if the POBOX field is not empty, and in this case the POBOX should be printed.

You can insert the established conditions into the expression field by using the "Insert" button. They can be stand-alone expressions or part of another expression.

Formatting Numbers, Dates and Currencies



Formatting Numbers, Dates and Currencies

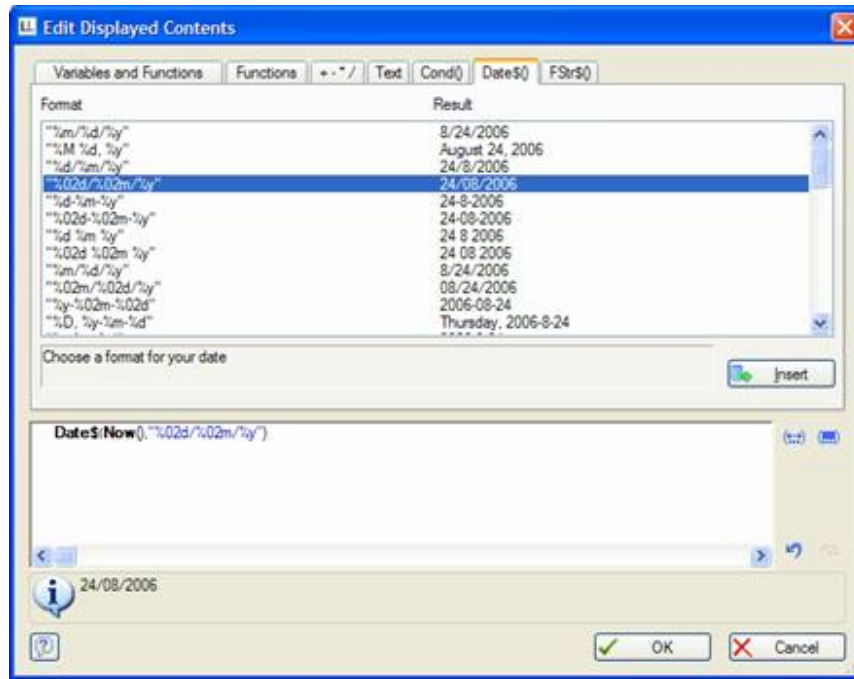
See also:

- ▶ [Formatting Dates with Date\\$\(\)](#)
- ▶ [Formatting Numbers with FStr\\$\(\)](#)
- ▶ [Formatting with the format editor](#)



Formatting Dates with Date\$()

Using the dialog with the card "Date\$()" you can get assistance for date formatting. You can have full-text formatting for day and month values, 2- or 4-letter representation of the year and so on.



To the left is the format string, to the right the result with a date example:

As default, the function Today() is selected as date parameter which will display the current date. Of course you can replace it with any date value you like:

```
Date$(Today() + 7, "%d.%m.%y")
```

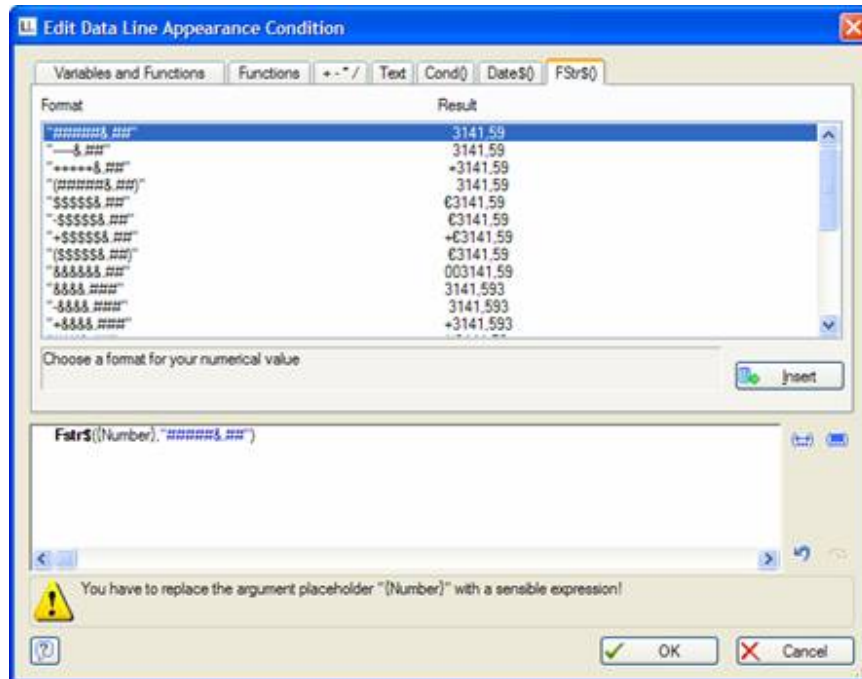
This would display the date one week from today.

In the above example, the date function "Today()" has been formatted so that the result is displayed with the month and the day as a two digit number, and the year as a four digit number. More detailed information on the use of the Date\$() function can be found in the appendix.



Formatting Numbers with FStr\$()

Using the card "FStr\$()" you can define the format in which a number shall be presented. In this way number of digits, decimals, leading signs etc. can be defined.



In this example, the price will be displayed with 6 digits including 2 decimals. If the number just before the decimal point is 0, only one '0' will be displayed.

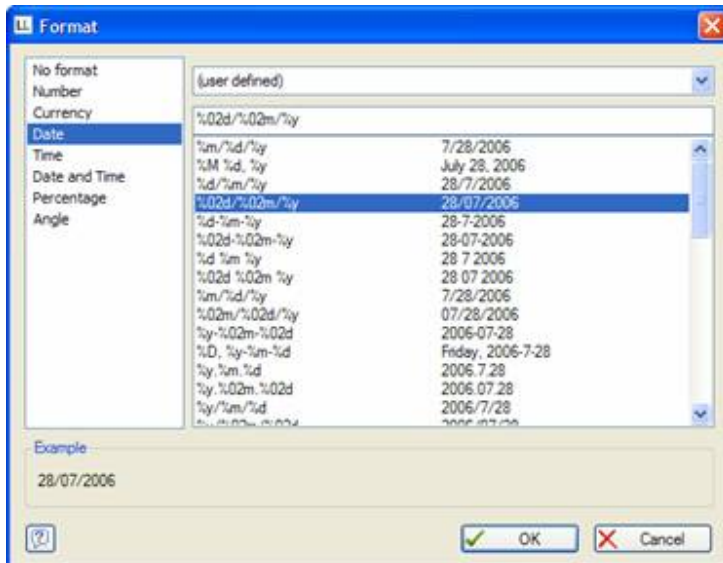
Additional information about the function "FStr\$()" can be found in Chapter Examples for the Use of Functions.



Formatting with the format editor

The format editor is an alternative to formatting with the functions Date\$() and FStr\$() in the formula dialog. This property can be found, for example, in text, crosstab and table fields. Note that the formatting will affect the expression's result. If you only wish to format certain parts of an expression (e.g. for text and numbers within one expression) use the functions Date\$() and FStr\$() in the formula dialog.

With the format editor you can set the format for numbers, currency, date, time, percentage and angle. By default, the system settings are used.



Operators



Operators

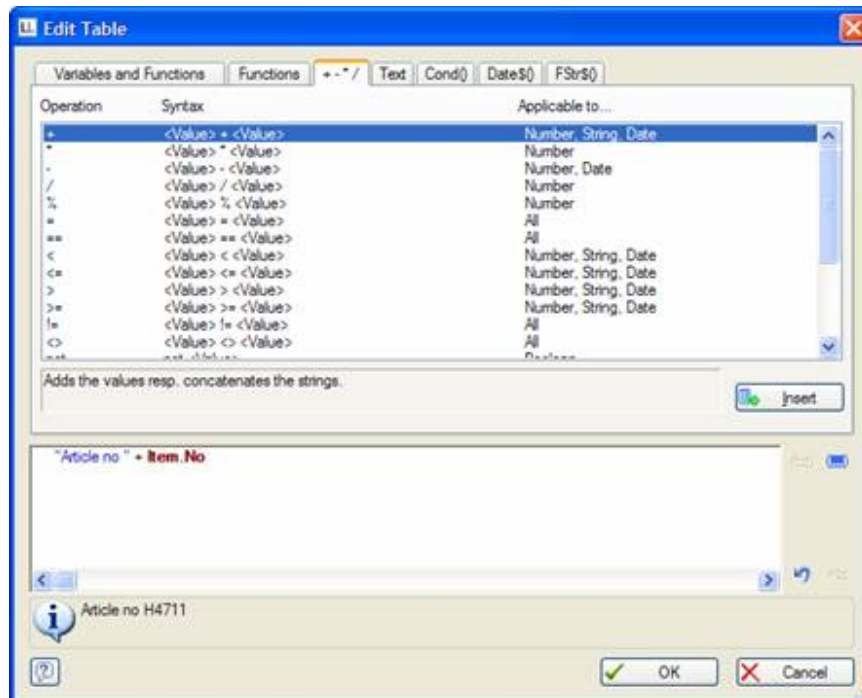
The card "+ - * /" displays a list of all available operators. These can be used to make calculations, combine variables and/or fixed text, as well as to perform logical comparisons.

The available operators can be categorized, in order of increasing priority, into logical operators (AND, OR, NOT), arithmetic operators (+, -, *, /, %) and relations (<, <=, =, >, >=, <>, !=).

The usual editing rules apply: logical operators will be calculated before arithmetical operators, which will in turn be calculated before relations.

There are three columns on the dialog page. The first describes the operator, the second is the syntax and the third the type(s) of value(s) it can be applied to.

The operator "+" has particular importance, because it can not only be used for addition (Value types "Number" and "Date"), but also for the concatenation of text (Value type "String") or fixed text.



Many operations can be performed in an expression. Operators, functions, parentheses - all in one formula. Thus it can be important to use parentheses to change the order of evaluation.

The order of priorities is

Priority	Operators
1	Parentheses ()
2	Functions
3	Logical operator NOT
4	Logical operators AND, OR, XOR
5	Arithmetical operator modulo (%)

6	Arithmetical operators (*, /)
7	Arithmetical operators (+, -)
8	Relational operators (<, <=, =, >=, >, <>, !=)

Operators combine two values to make a result, except for the negation operator NOT, which just takes one value. Operators are used to calculate (mathematical operators), compare (relational operators) or combine (logical operators).

See also:

- ▶ [Relational Operators](#)
- ▶ [Arithmetic Operators](#)
- ▶ [Logical Operators](#)



Relational Operators

Relational operators consist of two values of the same data type that are compared, effectively, for whether the selected relational operator applies to both values or not. The result (return value) is the boolean value true if the relation applies and false if it does not.

Operator	Meaning	Data Types	Result Types
>	Greater than	STRING, NUMBER, DATE, RTF	BOOLEAN
> =	Greater than or equal	STRING, NUMBER, DATE, RTF	BOOLEAN
<	Less than	STRING, NUMBER, DATE, RTF	BOOLEAN
< =	Less than or equal	STRING, NUMBER, DATE, RTF	BOOLEAN
=	Equal	STRING, NUMBER, DATE, RTF, BOOLEAN	BOOLEAN
= =	Equal	STRING, NUMBER, DATE, RTF, BOOLEAN	BOOLEAN
<>	Not equal	STRING, NUMBER, DATE, RTF, BOOLEAN	BOOLEAN
! =	Not equal	STRING, NUMBER, DATE, RTF, BOOLEAN	BOOLEAN



Arithmetic Operators

Please note that for arithmetic operators the normal calculation hierarchy applies. First the "Modulo" operator is evaluated, then the "*" and "/" calculations followed by the "+" and "-" calculations. If you want a different calculation sequence, you must use brackets. The innermost brackets are calculated first.

Operator	Meaning	Data Types	Result Types
%	Modulo	NUMBER	NUMBER
+	Add	STRING, NUMBER, DATE	STRING, NUMBER, DATE
-	Subtract	NUMBER, DATE	NUMBER, DATE
*	Multiply	NUMBER	NUMBER
/	Divide	NUMBER	NUMBER

An example for the use of arithmetic operators is the expression

`PRICENETTO+(PRICENETTO*0.16)`

With this, the value of the PRICENETTO field would have 16% of the content of PRICENETTO added to it.



Logical Operators

The result (return value) of a logical expression is always a boolean value: true if the expression is true and otherwise false. Please note that for logical operators a calculation hierarchy similar to that for arithmetic operators applies. First the negations are evaluated, then the logical AND and lastly the logical OR. If you desire a different calculation sequence, you must use brackets. The innermost brackets are evaluated first.

Operator	Meaning	Data Types	Result Types
NOT or .NOT.	Not	BOOLEAN	BOOLEAN
AND or .AND.	Logical AND	BOOLEAN	BOOLEAN
OR or .OR.	Logical OR	BOOLEAN	BOOLEAN
XOR or .XOR.	Logical exclusive-OR	BOOLEAN	BOOLEAN

An example for the use of logical operators is the expression

```
ZIP>=70000 AND ZIP<=80000
```

With this, all records whose contents in the ZIP field are greater than or equal to 70000 and smaller than or equal to 80000 are selected.

Working with Sum Variables



Working with Sum Variables

Hint: sum variables are an alternative way of creating sums and counters. We recommend using the functions `Sum()` and `Count()` respectively. Further information can be found under `Sum()` and `Count()` in the chapter `List of Available Functions`. Statistical analysis can be done directly using the aggregate functions `Sum`, `Avg`, `Min`, `Max`, `Variance`, `StdDeviation` and `Count`.

Sum variables can be used to build sums/totals over the records, for example the sum of the column `PRICE` in a table.

It is possible to optionally add all records on a particular page (page totals) or for the whole project (totals).

See also:

- ▶ [Defining Sum Variables](#)
- ▶ [Defining a Counter](#)



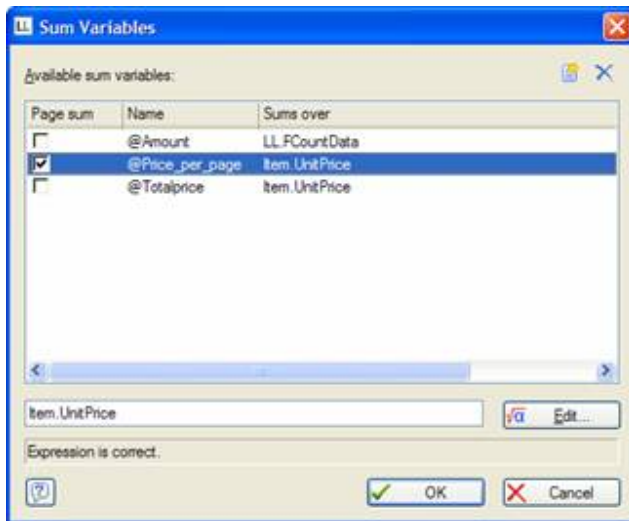
Defining Sum Variables

Sums of this type can be used for all numeric values, i.e. for numeric variables or for expressions which result in a numeric value. The following logic applies for these sum variables:

$@SumXX = @SumXX + <numeric\ expression>$

"@SumXX" is the sum variable in which the result of the addition is saved, "<numeric expression>" stands for the variable or the expression which forms the basis of the addition.

For each record which has been printed, InLoox calculates the value from "<numeric expression>" and adds it to the "@SumXX".



To use sum variables of this kind ("@SumXX") in projects they must be assigned the required numeric expressions. This is done with the command **Project > Sum Variables**.

Click the **"Insert a new variable"** button to create a new sum variable first and give a descriptive name. When working with projects from older InLoox versions, 50 variables "@sum01"..."@sum50" are already predefined. To assign an expression to the new sum variable, click the **"Edit..."** button. This opens the assistant for defining expressions.

The easiest way is to simply select a numeric variable, e.g. PRICE. The formula for the result would be:

$@SumXX = @SumXX + <PRICE>$

ex. the sum of all previously printed prices is saved in the sum variable "@SumXX".

On the other hand you can also build sums via complex expressions, as long as the result is only a numeric value.

Defining a Counter



Defining a Counter

With sum variables you can easily define the counter which is actualized for each printed record.

In the simplest case, a counter is increased for each record.

@SumXX = @SumXX + 1

See also:

- Page Totals and Other Totals
- Using Sum Variables



Page Totals and Other Totals

The option "**page totals**" lets you select whether the sum variables are reset at the beginning of each page or just once at the beginning of the document.



Using Sum Variables

Once you've defined a sum variable, you can use it in the objects of your project.

To do this, open the Contents dialog of the appropriate object and then open the dialog for the definition of expressions. (See Chapter Variables, Formulas and Expressions). In the card "Variables and Functions", you will also find the Sum Variables @SumXX listed. You can use these variables in your expression just like any other variables.



Working with User Variables

To avoid having to re-enter formulas that are required often, it is possible to store them in user variables. These are effectively formula building blocks. User variables are labeled with @<Name> (e.g. @User01). These are defined in **Project > User Variables**.

Using Filters



Using Filters

You can use filter conditions to select the data you'd like to print. You can assign such conditions to single objects or layers (so that they are printed or not) as well as to data records.

Filter conditions are logical expressions and the result determines whether the object or record will be printed. If the result of the logical expression is TRUE, the record is used (or the object is printed). If the result of the logical expression is FALSE, the record or object will not be printed.

See also:

- ▶ Record Filters
- ▶ Project Specific Filters for Records
- ▶ Layer Specific Filters for Objects
- ▶ Object Specific Filters for Objects
- ▶ Define Filters



Record Filters

If you wish to print a telephone list, for example, you can ensure through the use of filters that only those records that have contents in the Telephone Number field appear in your list.

Record filters are available for all types of projects. They are most commonly used in list projects. These filters can be globally defined for a complete project or individually for single variables.



Project Specific Filters for Records

Project specific filters always apply to the complete project. They apply to all objects and variables, whether individual filters have been assigned or not.

To assign a project specific filter, use the command **Project > Filter**, which will open a dialog for the definition of filter conditions. This is similar to the dialog described in Chapter Variables, Formulas and Expressions.



Layer Specific Filters for Objects

All objects assigned to a layer can have a common, layer specific appearance condition assigned. This is accomplished by using the command **Project > Layer Definitions** or the context menu in the Layer Window.

Select the level, in the Layer Window, to which you wish to assign layer specific appearance conditions. Enter the desired condition directly into the field "**Condition**", or open the dialog for the definition of layer conditions (see Chapter Variables, Formulas and Expressions).



Object Specific Filters for Objects

Appearance conditions can also be assigned to individual objects. The individual appearance conditions will be applied in addition to the display conditions, if conditions have been defined, of the layer to which the object is assigned. This means that both conditions for the object will be linked with a logical "AND".



Define Filters

To define object specific filters, enter the desired condition in the property "Appearance Condition" in the Property List.

Projects



Projects

See also:

- ▶ [Creating or Opening a Project](#)
- ▶ [Saving projects](#)
- ▶ [Defining Page Setup](#)
- ▶ [Default Values and Options](#)
- ▶ [Including Projects](#)
- ▶ [Printing Projects](#)

Creating or Opening a Project



Creating or Opening a Project

Use the **File** menu commands to open existing projects in the InLoox Designer or create new ones.

See also:

- ▶ Create a new project
- ▶ The Project Wizard
- ▶ Opening an Existing Project
- ▶ Project Import
- ▶ Project Types
- ▶ Project Properties



Create a new project



To start a new project, select **File > New**. If your current project has unsaved changes, you will be asked whether you would like to save them. InLoox then automatically opens the default project for the type of project you require.

Normally this is merely an empty workspace with a certain paper size and alignment. In the case of label projects you can also pre-determine a certain label format (size and the layout of individual labels on the page).

If you select "New project assistant" in the **Options > Workspace** dialog, you will be guided through the process of creating a new project by the project wizard (see below).

Tip: A default project is a standard empty "copy" to aid in the creation of projects. It is however possible for you to change the default project to your own requirements and save it as a file called "default". The next time you use the command **File > New** your own - changed - default project will be opened.




The Project Wizard

The project wizard will help you create new projects. In label / card projects you will be first lead through the layout options. Afterwards you can select a page title and a matrix of text objects. In list projects you can set the layout options as well as:

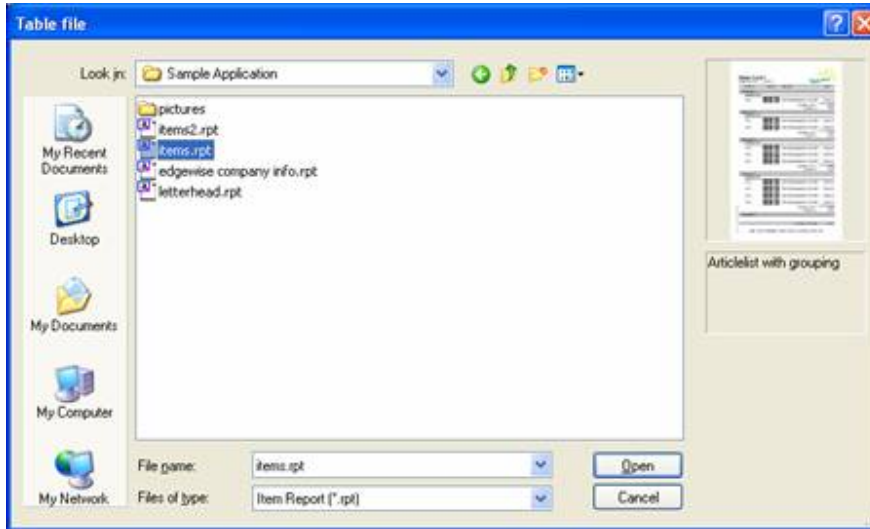
- page numbering
- page title (first page only or all pages)
- zebra pattern for the table
- create a summary
- select the data for the table object



Opening an Existing Project

 To open an existing project select **File > Open**. If your current project has unsaved changes, you will be asked whether you would like to save them.

A dialog will open in which you can select the file to be opened.



If a description has been given to a project (see **File > Save As**) the description will be displayed underneath the sketch field. In the "sketch" field you can see a sketch of each selected project, making it easier for you to find the project you are looking for. (The sketch is only shown if the corresponding option is set, see: **Options > Compatibility > Sketch in File Dialog**).



The Designer will issue a short warning if you select a project that was designed with an older version. Please note that projects designed with the new Designer will not be readable or editable with an older version. We advise you to make backups of your project files before editing them with the new Designer. Please check your layout after conversion carefully, as slight changes may occur.



Project Import

With the command **File > Import** you can insert all objects from another project into the current project.



Project Types

The InLoox Designer is capable of different kinds of projects: labels, lists and cards. Please note that it is not possible to switch between the different project types in one Designer session. The Designer has to be closed and reopened in the new mode for this purpose.

It is however possible to design multiple projects of the same type in a single session. Simply open or create the projects in the order you want to design them. You may not open multiple projects at one time, but you can copy objects from one project to another using the clipboard.

Project Properties



Project Properties

The properties window of the project is displayed when no objects are selected in the workspace.

See also:

- ▶ Project description
- ▶ Minimum page count
- ▶ Fax and mail variables



Project description

In the "Project Description" field you can enter a description of the project. This description is then displayed in the dialog **File > Open** and makes it easier to find the desired project. Alternatively, this description can also be displayed in the **File > Save As...** dialog.



Minimum page count

In the "Minimum page count" field you can set that a certain number of pages must be printed.



Fax and mail variables

You can send InLoox documents directly as a fax with the Windows 2000 / XP fax machine. The corresponding printer driver is set up automatically (in Windows 2000 /XP) when you have a fax-capable modem installed on your computer. When sending a fax, additional information is needed to be able to address the fax, i.e. at least the fax number must be present as information in the document. These fax variables are defined directly in the properties window of the project. The properties window is displayed when no objects are selected in the workspace.

You can also send InLoox documents directly by eMail. The required eMail variables are also defined in the properties window of the project. The eMail settings (SMTP, MAPI, XMAPI) are changed in the control panel under "combit Mail Settings".



Saving projects

Projects can be saved using any file name that is allowed by your operating system. It is recommended however to use the default file extension for each project type.

To save a project, select **File > Save**. When you want to save new projects using **File > Save**, the **File > Save As** dialog will be displayed and you can select a name for your project.

To save an existing project under a different name or path, select **File > Save As**. A dialog will open in which you can enter a name for the project, the device and the directory in which the project will be saved.

In addition to the file name, you can give a short description of the file which will be shown in the file-open dialog to help you to easily distinguish your projects.

Defining Page Setup



Defining Page Setup



Before you start to place objects in a project, please select your layout. With the command **Project > Page Setup** you can define properties such as printer selection, paper size and orientation. The layout options available depend on the type of project you are currently working with.

See also:

- ▶ Printer Selection
- ▶ Export Media
- ▶ Templates and Page Layout for Labels

Printer Selection



Printer Selection

See also:

- ▶ [Selecting Printer and Paper Format](#)
- ▶ [Force Page Format\(s\), if possible](#)
- ▶ [Use physical paper size and not only the printable area](#)



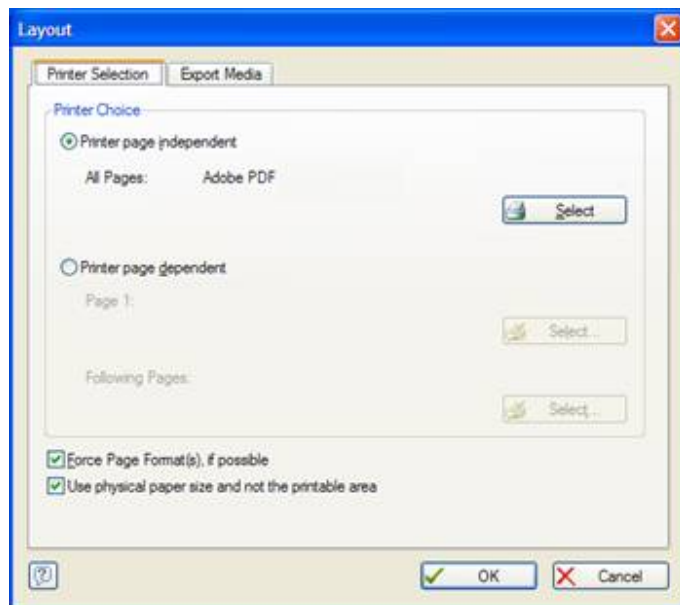
Selecting Printer and Paper Format

Click the "Select" button to define the paper size and orientation and select the printer for the project.

You can also either open a predefined label format, or freely create your own. The paper orientation is saved with the project and does not change the Windows default printer settings.

If the project consists of only one page or requires one printer specification for all pages select "**Printer page independent**".

For projects with more than one page it can be useful to select a different printer specification or different printer. If you check the "**Printer page dependent**" option, you can select different printers (-options) for the first and the following pages. In this way you can use corporate letter-head paper for the first page and normal paper for the following pages.





Force Page Format(s), if possible

If no printer definition file exists and this option is set, the paper format selected during design will be forced during print out. Prerequisite is that the respective format or a "user defined" format is supported by the printer. If not, the next size up will be selected.



Use physical paper size and not only the printable area

If this option is set the whole physical page is available as workspace, including non-printable margins. Some label page layouts require this, as the first label starts right at the top left edge instead of at a specific distance. The unprintable margins are shown shaded in the full-page preview.

This means that objects can also be placed in the margins which will be cut off during the print. If objects are placed on page edges you still should take notice of the unprintable area.



Export Media

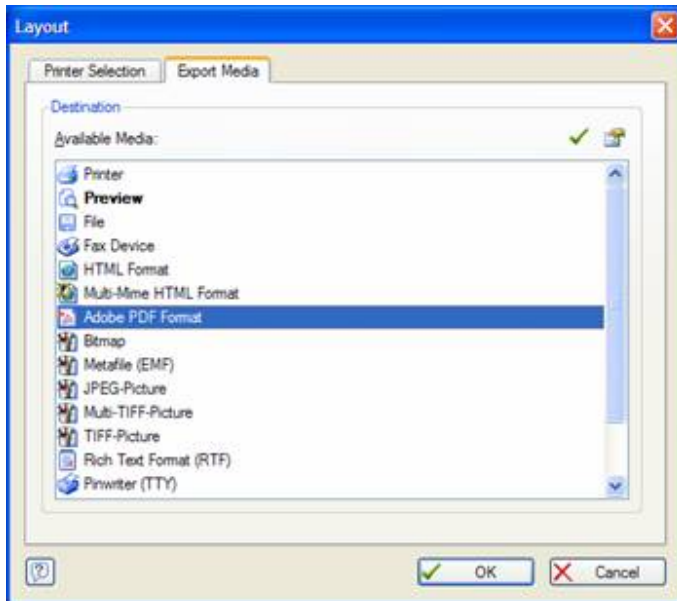
Depending on the application, different export possibilities of InLoox are listed. You can configure the output into different export formats by the corresponding option dialogs.



Select the format in the list and click on the options button



You can select a target format as default for the later print



Templates and Page Layout for Labels



Templates and Page Layout for Labels

A previously or manually defined label format can be loaded in the page layout for labels.

See also:

- ▶ [Using Pre-Defined Label Formats](#)
- ▶ [Defining Your Own Label Formats](#)
- ▶ [Defining Print Order](#)



Using Pre-Defined Label Formats

You can select from a range of pre-defined label formats in the "**Templates**" register in the page setup for labels. Now you won't have to figure out the size of a particular label and how many labels are on one page.

Defining Your Own Label Formats



Defining Your Own Label Formats

It is also possible to define your own label layout if the one you require is not available. Use the following values:

	Horizontal (x):	Vertical (y):
Page:	210.0 mm	296.9 mm
Offset:	5.0 mm	5.0 mm
Size:	99.0 mm	40.1 mm
Distance:	0.0 mm	0.0 mm
Number:	2	7

Print Order

horizontal horizontal bottom up

vertical vertical bottom up

OK Cancel



Setting the Offset

The offset provides the horizontal and/or vertical distance of the top left-hand label to the edge of the workspace (depending on the "physical page size switch, this is relative to the paper edge or the printable area edge).

The top left corner of the workspace always begins on the screen display with the coordinate 0/0, independent of the selected page size and offset. The effects of the offset can however be seen in the full-page preview or when you print.



Setting the Size

This provides the size (horizontal = width / vertical = height) of the label in inch or mm.



Setting the Distance

This option defines the distance from one label to the next (the space between two labels). For labels with only one column, only the vertical distance needs to be entered.



Setting the Number

This option defines the number of labels per page. (horizontal value = number of columns per page, vertical value = numbers of lines per page)

You can check the layout by selecting **Options > Preview > Page Preview**.



Defining Print Order

In addition to the printer and paper format, in a label project you can also define the print order of the labels on a label sheet. Labels are normally printed in lines from top left to bottom right. With partly used sheets of labels you may have already used the first line of labels, for example, which could cause the sheet to lose its stability at the top. Some printers have problems taking such sheets and react with a paper jam.

Here you have the option of printing sheets of labels from the bottom up. In this way the top line of labels will be printed last and the sheet remains stable, even when the critical area on the sheet is reached.

Default Values and Options



Default Values and Options

Before you start to insert individual objects belonging to a project on your workspace, and set their properties, you need to define the default values you require with the command **Project > Options**. In this way you'll save time and effort later.

Each option in this dialog is explained by a tool tip.

See also:

- ▶ Options for the Project
- ▶ Options for Objects
- ▶ Options for the Preview
- ▶ Options for the Workspace
- ▶ Compatibility Options
- ▶ Options for the Formula Wizard

Options for the Project



Options for the Project

The options set in the "**Project**" card are only valid for your current project.

See also:

- ▶ [Defining Alignment Grid](#)
- ▶ [Precision](#)
- ▶ [Exporting to PDF](#)



Defining Alignment Grid

Specify whether a grid net should be placed in the background of the workspace or not. You can set the distances between the grid lines. The option "**horizontal - vertical - synchronized**" enables the same grid spacing in both directions.

With the option "**Snap to Grid**" you ensure that objects are not freely inserted or moved on the workspace but only along the (sometimes invisible) grid lines.



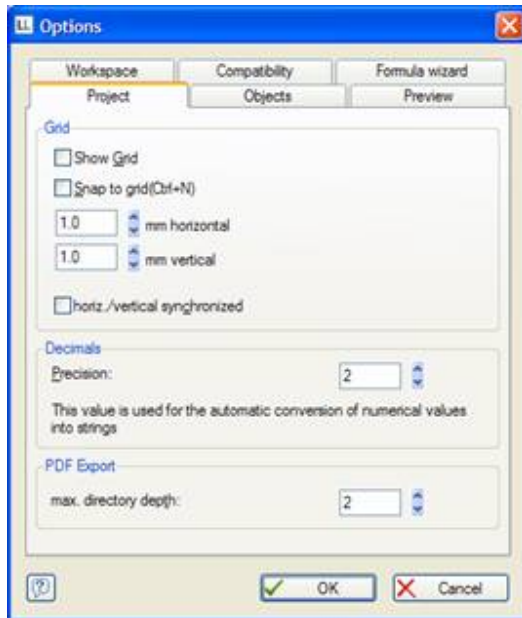
Precision

Here you can define the default number of decimal places for numeric values, which will be used as long as they aren't printed with format specifiers (ex. FStr\$).



Exporting to PDF

Here you can set the maximum directory depth of group headers, which are turned into PDF bookmarks when exporting to PDF.



Options for Objects



Options for Objects

Default values set on the card "**Objects**" are valid for all new objects, until they are changed.

With the card "**Objects**" you can make various settings for objects. Newly created objects have these default values at the start. You can change these values later for each object. We recommend defining these values to a suitable level when beginning a new project so that the manual changes are later kept to a minimum.

The default values are only valid for the current project.

See also:

▶ [Object Font](#)

▶ [Color Preferences](#)



Object Font

In the "**Object Font**" group you can define the font for each newly inserted object, using the "**Select**" button. With the button "default" in the object properties the font can be adjusted to a predefined system font. The settings also affect all objects which were not changed manually to a non default font.



Color Preferences

The category "Color Preferences" allows you to set options for the appearance of objects.

With the combo boxes "Border" and "Filling" you can set different colors for different objects.



Options for the Preview



Options for the Preview

On the "**Preview**" card you can define global settings for the preview.

See also:

- ▶ [Setting Colors for the Preview](#)
- ▶ [View of Label/Card Projects](#)



Setting Colors for the Preview

In the "**Colors**" group you can define the color for the background of the preview window using the combo box "**Background**". With the combo box "**Border**" you can select the color of the simulated paper border in the preview.

View of Label/Card Projects



View of Label/Card Projects

Here you can select if the preview should contain only one label or the complete page (only available for label or card projects).



Optimized View

Using the options from the "**View Optimization**" group you can reduce different preview details, which enables a faster preview.



Options for the Workspace



Options for the Workspace

The workspace can also be adjusted to your needs in various ways.

See also:

- ▶ [Displaying Objects](#)
- ▶ [Settings for Usability](#)
- ▶ [Changing Column Widths Using the Cursor](#)



Displaying Objects

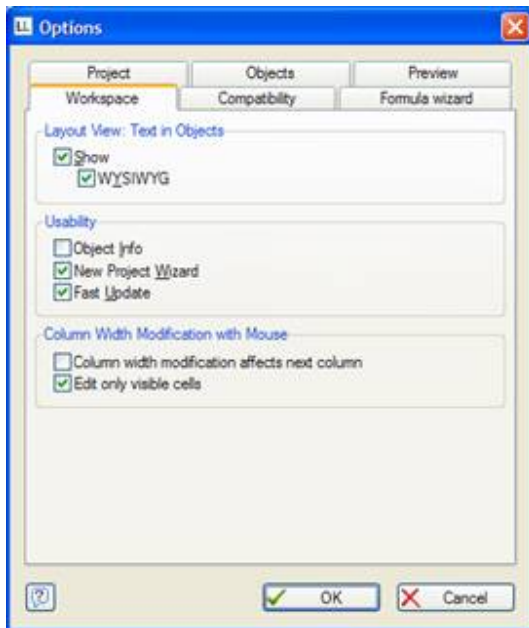
In the "**Text in Objects**" group you can define whether the text contained in objects should be displayed or not on the workspace. The "**WYSIWYG**"-option displays the selected fonts and formats the way they are printed.



Settings for Usability

The "**Usability**" options allow you to define various default values for handling the InLoox Designer.

- Check the option "Object Info" to get a tooltip with the object name.
- Check the option "New Project Wizard" to receive assistance when creating new projects.
- If the option "Fast update" is checked objects will be painted faster. On some systems light flickering may occur.





Changing Column Widths Using the Cursor

The width of a field or an entire column can be controlled precisely by adjusting the "width" property. You can also control the width directly with your cursor in the workspace by selecting the table object and moving the right hand border line of a column. This will affect all table columns, whose separators lie within a +/-2mm interval of the cursor.

- The adjustment will affect only the line on which the cursor is positioned if CTRL is held down.
- The line will snap to a separator mark if it is within a 10 pixel interval of it. By holding SHIFT, this function is turned off.
- With the option "Column width modification modifies next column", it is possible to change the width of the column while also changing the width of the next.
- To change the widths of columns that are currently invisible, deactivate the "Edit only visible cells" option.

Compatibility Options

*Compatibility Options*

Here you can set various options which concern the compatibility with other components and previous versions of InLoox.

**See also:**

- ▶ Clipboard Format is Text
- ▶ Sketch within File Dialog
- ▶ Selection mode after object insertion



Clipboard Format is Text

This option defines the format in which objects will be copied to the clipboard in the InLoox Designer. This option only takes effect when pasting Designer objects into other applications.

When the option is set, the internal definition of the object can be inserted via the clipboard into other programs.

When the option is not set, InLoox uses its own clipboard format.



Sketch within File Dialog

This option defines whether a sketch of the currently selected project is shown in the file selection dialog. When the option is set, a sketch will be created each time you save the project.

Some very old graphic card drivers unfortunately have problems in the support of this function. In this case it is helpful to switch off the option.



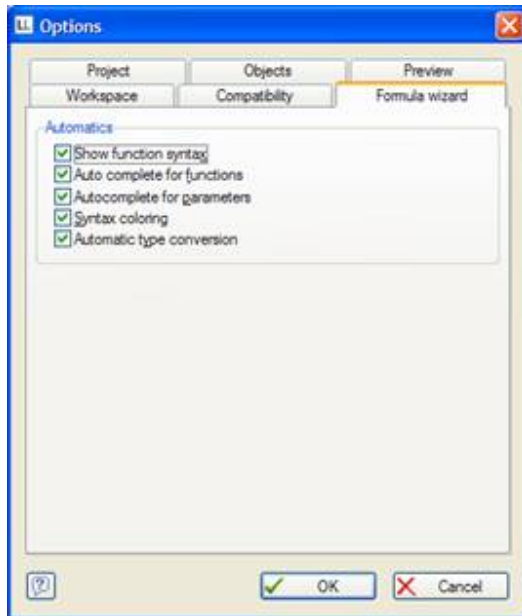
Selection mode after object insertion

- Set the "Selection mode after object insertion" option in order to switch to the selection mode automatically after inserting an object. This prevents you, for example, from inserting multiple objects accidentally.



Options for the Formula Wizard

The Formula Wizard offers many ways of simplifying the creation of formulas and functions. For further details regarding working with formulas, look at [Variables](#), [Formulas and Expressions](#). In this interface, you can deactivate the functions if desired. See [Input Enhancements of the Formula Wizard](#) for specific details on the options.



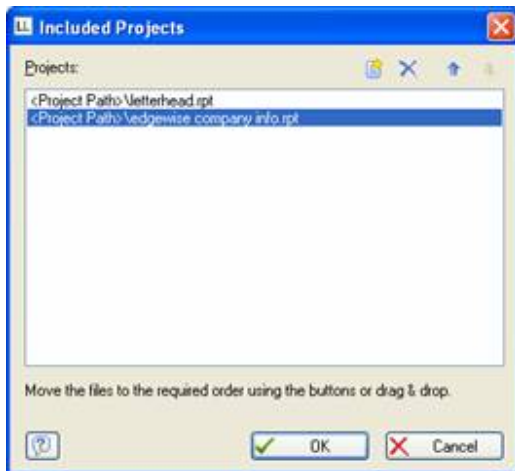


Including Projects

When often using similar projects, it is practical not to design repeating elements over and over again, but to include other existing projects in your current projects. This way e.g. a letter head can easily be included. In addition, changes just need to be edited in one place, if e.g. the design needs to be adapted. A change of address has to be made only in one single project instead of different projects.

Using **Project > Include** you can include existing projects in current projects.

The objects of these included projects will be visible, but are locked against editing. Also included are sum and user variables of the original project. Please notice not to generate duplicate identifiers when designing, e.g. including an existing project that is using a sum variable which is already used within the current project. The sequence in which the projects are included can be defined here as well.



Printing Projects



Printing Projects



InLoox offers two ways of printing: using the test print in the designer which uses some sample data values, and the final print with the "real" data, initiated by the application.

See also:

- ▶ [Print Sample from the Designer](#)
- ▶ [Printing to Real Data Preview](#)

Print Sample from the Designer



Print Sample from the Designer



Using **File > Print Sample** you can generate a sample printout of your current project. You can use this sample to check the layout of your project.

Fixed text appears as in the final print, but variables are substituted by sample data which is constant throughout the sample. Printing real data can not be done from the Designer.

See also:

- ▶ [Printing layers](#)
- ▶ [Print Sample with Frames](#)
- ▶ [Print Sample without Frames](#)
- ▶ [Print Sample 1st Page](#)
- ▶ [Print Sample Following Page](#)
- ▶ [Print Last Page](#)



Printing layers

With the option "**Only Visible Layers**" on the "**Preview**" card in the options dialog, which is opened with **Project > Options**, you define the way layers are printed in the sample print. When this option is not activated, all layers will be printed during the sample print. When this option is activated, only the layers visible in the Designer will be printed. The sample print is identical to the project in the Preview Window.

Various options are available for the test print depending upon the type of project being created.



Print Sample with Frames



By selecting the command **File > Print Sample > Print Sample with Frames**, your labels will be printed on plain paper with a frame, which represents the borders of the labels.

These frames do not appear when printing real data.

By using these frames, you can determine if your labels have been printed in the correct size and position.



Print Sample without Frames



By selecting the command **File > Print Sample > Print Sample without Frames**, a page of your project will be printed, without frames, in the way that it was defined with the exception that the variables have been replaced with sample data.

Print Sample in List Projects

The command **File > Print Sample** offers you the options **Print Sample 1st Page** and **Print Sample Following Page** for your list project.

With multipage projects, you can define the first page, which may have a special title or header, the following pages (which are between the first and last pages), and the last page. These three parts of a multipage project can be sample printed separately.



Print Sample 1st Page



To print the first page of your list project, select the menu command **File > Print Sample > Print Sample 1st Page**. This will generate a sample print of the first page only.



Print Sample Following Page



To print the following page of your list project, select the menu command **File > Print Sample > Print Sample Following Page**. This will print the second page of your project.



Print Last Page

Depending upon the number of records to be printed in your list project, the first, or one of the following pages, can be the last page. Objects can be defined for the last page, for example a closing text, by using the appearance condition "Lastpage()". These objects will appear on the last page only, in addition to objects that are normally assigned to the page.

When you use one of the commands for a sample print, a dialog will appear in which you will be asked if the objects with the appearance condition "Lastpage()" should be printed. If you answer the question with "YES" all objects with the condition "Lastpage()" will be printed. If you answer with no, these objects will not be printed.

This distinction is irrelevant if no objects have been created with the appearance condition "Lastpage()".

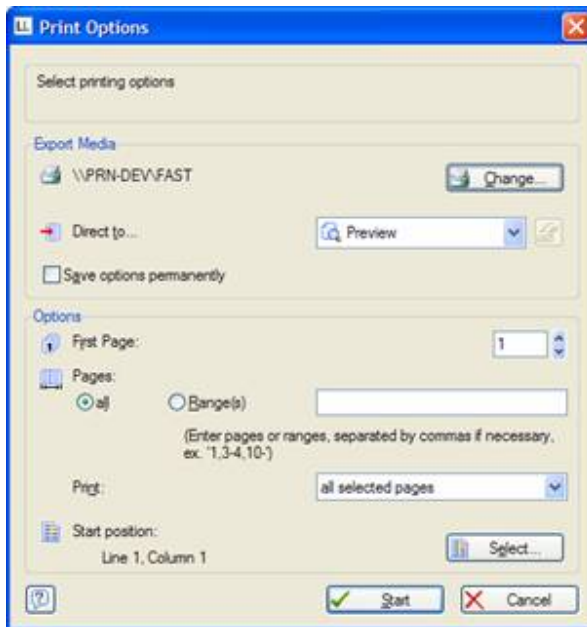
Please note that the condition "Lastpage()" is only reasonable for use with linked objects. Detailed information about linking of objects can be found in Chapter .



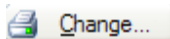
Printing to Real Data Preview

In addition to the Sample Print using sample data, InLoox offers a real data preview. But in contrast to the sample print, this can't be used in the InLoox Designer, but in the application. Refer to your application's manual for hints on how to open the preview print.

All print jobs can be viewed prior to printing in a preview window on the monitor. In this way, you can review the layout of your project without wasting paper. The output to the monitor takes place as it will during the actual printing. After reviewing the layout, you can start printing directly from the preview without again having to use the print command.

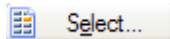


The dialog shown on the left will be presented which allows you to select the destination printer and - in case of label projects - the starting label.

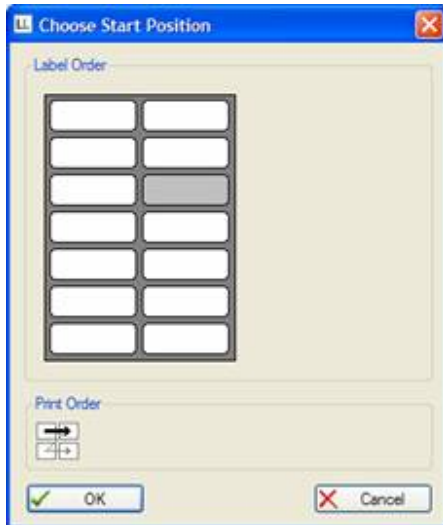


In the category "**Export Media**" you can, by using the "**Change...**" button select a different printer or different printer options than the defaults defined in your project in the Designer. This setting can be either one time (option "**Save Options Permanently**" not selected), or permanently saved to your project as the default (option "**Save Options Permanently**" selected). Depending on your application, various formats are available in "**Direct to**".

In the category "**Options**", you can enter the number of copies, the starting page number and the page range to be printed.

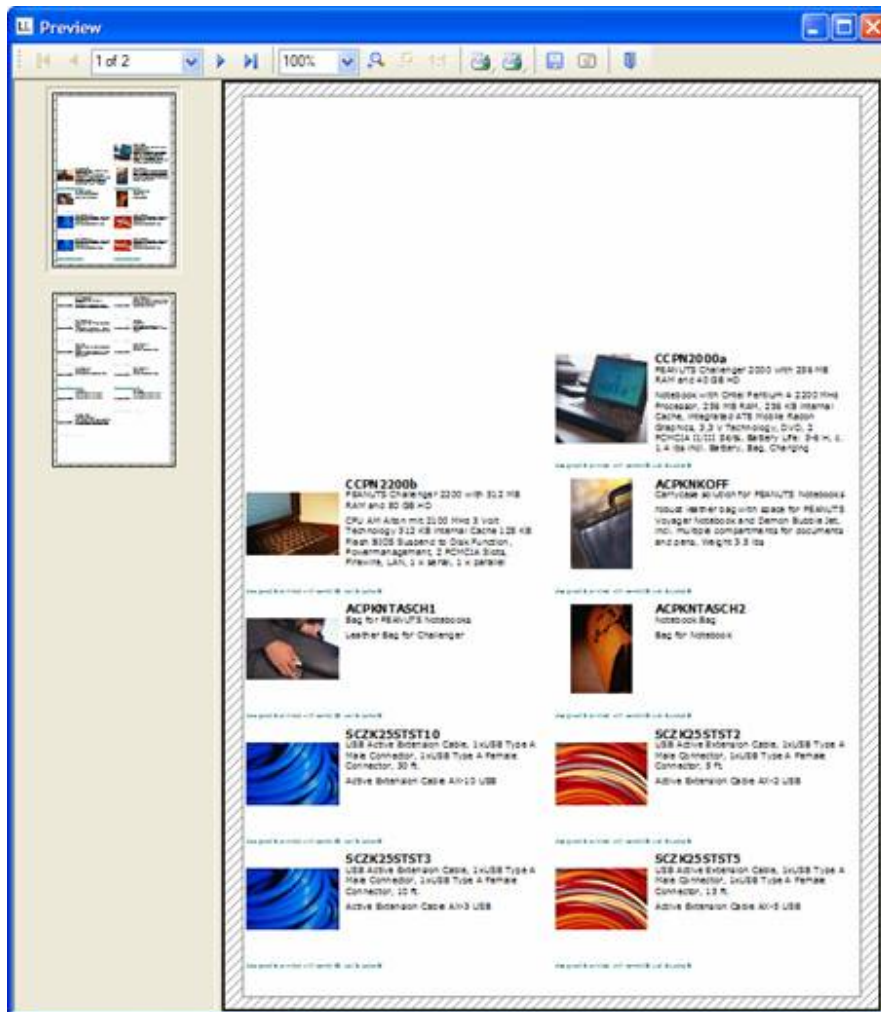


For label projects, you can additionally select the position of the first label on the first page. This is useful when printing on pages where labels have already been used.



The dialog shows the layout of the label page. Click on the label you want to use first during printout, taking into account the print order noted below. You can print not only from the upper left to the lower right, but you can reverse this order or print by columns. Printing will start from the label that you chose.

The entire print data can be viewed and printed in a preview window. The non-printable margins will be shaded. On the left side of the Preview window, you will find the individual pages of your project in reduced size as "thumbnails". This allows a very fast, direct navigation through the document. When you click on a thumbnail, the appropriate page will be displayed in the preview. The number of copies set in the printing options window is ignored in the preview and only becomes relevant when printing begins.



The preview window contains a toolbar that you can use to utilize the various functions of the preview.

The toolbar can, as with the InLoox Designer, be docked to all four sides of the work space or left floating as an individual window.

The arrow buttons allow you to change to the next/previous page or jump to the beginning/end of the document.

The magnifiers, as well as the 1:1 tool, represent various zoom levels that can be used to see fine details in the document. Alternatively, you can use the mouse to select an area to zoom by drawing a rectangle.

Using the button **"Print Current Page"**, you can individually print the currently displayed page from the preview. If you right click on this button, a Printer Assignment dialog window is opened.

Using the button **"Print All Pages"** will send all pages directly from the preview window to the printer. The file will be printed exactly as shown in the preview. The Printer Assignment dialog can also be opened using the right mouse button.

Use the button **"Send To"** to send the current preview file (*.LL) e.g. through your MAPI-Mail-Client to an email recipient. In order to view the preview, the recipient must use the InLoox Viewer, which is often included with the application. The InLoox Viewer can also be used to print the preview file.

Using the button **"Save As"** you can save the current preview file with the *.LL file extension.

The preview file can be saved in different formats, as e.g. data exchange format PDF. Depending on the chosen format, further corresponding properties are possibly available. Please notice that saving in another format does not guarantee that all information is copied.

Using the "**Exit Preview**" button, you will leave the preview window and return to your application. The displayed print preview will not be printed, but discarded. Any changes will be lost unless previously saved with "**Save As**".

Objects



Objects

This menu contains various functions for the editing of objects. A description of the properties that all objects have in common can be found in Chapter Common Object Properties.

When inserting objects, always proceed in the following way:

- Create an object as described in Inserting Objects. The object will be selected automatically.
- Edit the properties of the object with the appropriate tool window and "Properties".
- Hit ENTER in the work space or choose Contents from the Objects menu in the context menu or the properties list. A window appears in which you can define the internal setup of the objects.

See also:

- ▶ Inserting Objects
- ▶ Editing Objects
- ▶ Working with Layers
- ▶ Object List
- ▶ Interlinking objects
- ▶ Common Object Properties
- ▶ Report Structure
- ▶ Inserting Text Objects
- ▶ Inserting Lines
- ▶ Inserting Rectangles
- ▶ Inserting Ellipses
- ▶ Inserting Picture Objects
- ▶ Inserting Barcode Objects
- ▶ Inserting Table objects
- ▶ Inserting Formatted Text
- ▶ Inserting Chart Objects
- ▶ Inserting a Crosstab
- ▶ Inserting Form Controls
- ▶ Inserting HTML formatted text
- ▶ Inserting OLE-Server Documents
- ▶ Inserting Form Templates

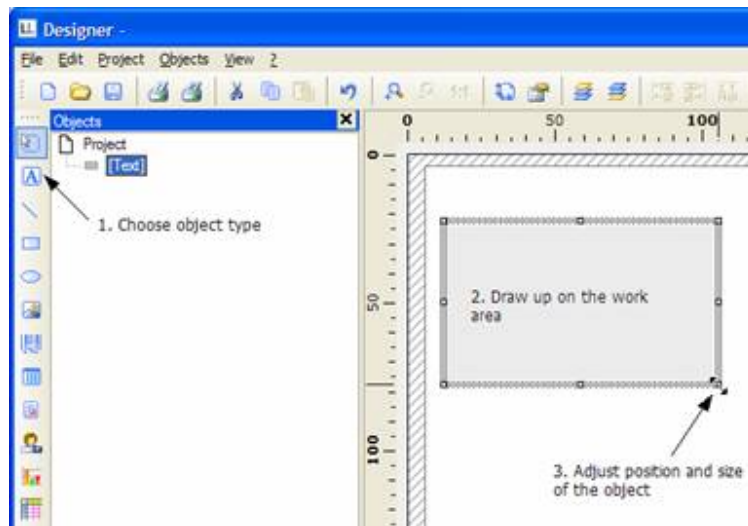


Inserting Objects

Objects usually have a rectangular shape and are surrounded by a frame in which their size and position can be changed. This frame indicates the area which the object occupies in the workspace and consequently the maximal scope that the contents of an object can have. Objects may, however, overlap slightly or fully whereby the overlapped object may sometimes be concealed completely.

Objects may be inserted in the project workspace in different ways: using the menu **Object > Insert**, the toolbar, shortcut keys or per drag & drop function of the variable list. Text objects are inserted most comfortably and efficiently per drag & drop from the variable list. Simply select the desired variable and drag it to a free area in the project workspace. The easiest way to insert all other objects is via the toolbar.

- Select the desired object type. The mouse pointer will change to a crosshair.
- Place the crosshair on the point at which a corner of the object should be placed. It is best to use the left upper corner of the planned object. Depress the left mouse button and pull - while keeping the mouse button depressed - to the opposite corner of the planned object. If you started in the upper left corner, pull the crosshair to the lower right corner of the planned object. A dashed frame will appear which represents the size that the object will assume upon release of the left mouse button.
- Release the mouse button when the object (dashed frame) has the desired size.



Editing Objects



Editing Objects



Select the object that you would like to edit. The object will be marked with a selection frame. You can now:

- change the size of the object
- reposition the object
- define the exact position of the object on the workspace via the position dialog in 1/10 increments of the current unit.
- edit the contents (properties) of the object. These contents are different according to the type of object selected (text, picture, table, etc.). You can find a detailed description of the properties of objects in the subchapters of Chapter [Objects](#)
- define appearance conditions for the object. With an appearance condition you define the condition(s) that must be met for the object to be printed. In this way you can allow a logo to appear on the first page of a project only and not on the following pages
- name the object. Using the name you can easily find the object you are looking for
- assign the object to a (display)-layer or copy it to a layer. Multipage and/or complex projects become clearer if objects which belong together are put on a mutual layer. So, in a multipage project all objects which belong to one page can be put on a common layer. You only need to switch the visibility of this layer when you want to edit it
- copy the object. If you want to place several, similar objects with the same distance on the workspace then you can use the function [Create Multiple Copies](#).
- If you have selected more than one object you can combine the selected objects into a group (grouping), align them or adapt their size.

These editing possibilities will now be described individually in detail.

See also:

- ▶ [Selecting Objects](#)
- ▶ [Arrange](#)
- ▶ [Alignment](#)
- ▶ [Moving and Sizing Objects](#)
- ▶ [Grouping Objects](#)

Selecting Objects



Selecting Objects



You must be in the selection mode before you can select an object. The currently active mode is displayed in the middle area of the info bar.

To select an object in the selection mode just click into the object you wish to select. If you click into the object with the right mouse button, the object will be selected and a context menu will be simultaneously displayed. An object can also be selected by dragging a frame around the object by using the left mouse button. Release the mouse button when the desired object is completely enclosed with the frame. All objects within the frame will be automatically selected.

See also:

- ▶ [Selecting Multiple Objects](#)
- ▶ [Selection Mode](#)



Selecting Multiple Objects

- to select multiple objects press the shift-key and click with the left mouse button into the objects you wish to select.
- drag a frame completely surrounding the objects you wish to select. All objects that are completely enclosed by the frame will be selected.



Selection Mode

When the command **Objects > Select** is selected, a sub-menu opens with which you can select from various select modes.

- Use the command **Objects > Select > Select All** or the shortcut **Ctrl+a** to select all objects in the workspace.
- Use the command **Objects > Select > Invert Selection** or the shortcut **Ctrl+y** to invert the selection. All selected objects become unselected and all unselected objects become selected. This is valid only for objects on visible layers.
- The order in which the objects were created is important for the command **Objects > Select > Next Object**. This command, or the plus key on the numeric keypad, selects the object that is next in the object list (that is, the object created later) than the currently selected one.
- This command has the opposite effect to **Objects > Select > Next Object**.

Arrange



Arrange

Objects on the workspace may overlap or completely cover each other. You can imagine that each of your objects will be printed on a transparency. When you place your objects on the workspace, place these transparencies in the proper order on top of each other. Each object is now in its own plane.



You can look at the order using the object list (**Objects > Object List**).

Using **Objects > Arrange**, you can rearrange the planes of the selected objects so that they have the order you require.

Please note that these "planes" (just a term in this case) have nothing to do with the layers. Objects that have been edited using **Objects > Arrange** will not have their layer assignment changed.

Select the object that you would like to arrange on the workspace, and select one of the following options.



To Front

All selected objects are moved on top of the stack of sheets, that is, they have priority over the objects lying deeper. Use the command **Objects > Arrange > To Front** to bring the selected object to the top of the stack, or use the shortcut CTRL+POS1.



To Back

Puts the selected objects to the bottom of the stack of sheets. Use the command **Objects > Arrange > To Back** place the selected object at the bottom of the stack, or use the shortcut CTRL+END.



One Forward

Using the command **Objects > Arrange > One Forward** or the shortcut CTRL+PAGEUP, the selected objects will be moved one position up in the stack of sheets.



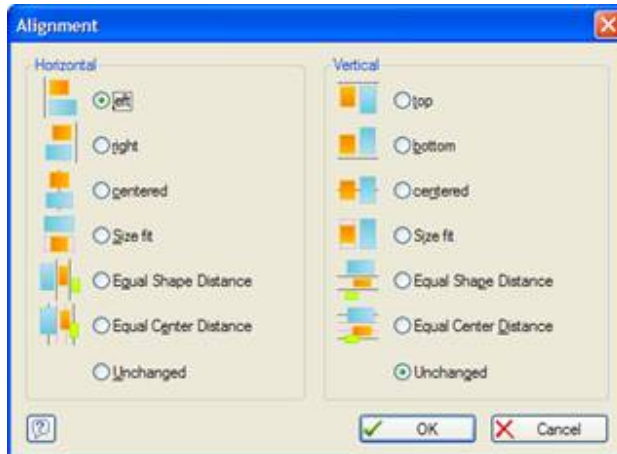
One Backward

Using the command **Objects > Arrange > One Backward** or the shortcut CTRL+PAGEDOWN, the selected objects will be moved one position down in the stack of sheets.

Alignment

*Alignment*

Using the command **Objects > Arrange > Alignment** you can align multiple objects in relation to each other. A minimum of two objects must be selected to use this command.



Each direction (horizontal and vertical) has 6 alignment methods. Select the ones you like, even horizontal and vertical simultaneously. If the objects should not change in one direction, leave the method of this direction to "Unchanged".



Left / Right / Top / Bottom

The functions reposition the selected objects at the corresponding border of the selection rectangle. They will not change in size.



Centered

The objects will be placed at the center of the selection rectangle. They will not change in size.



Size Fit

The objects will be resized to fill the selection rectangle in the corresponding direction (horizontal or vertical). Thus they will all get the same width or height.



Equal Shape Distance

The selected objects will be repositioned so that the distances between their frames are constant. If the objects are equal in size, this is the same as Equal Center Distance.



Equal Center Distance

The selected objects will be repositioned so that the distances between their centers are constant.



Unchanged

Select this if you do not wish to make any changes in the corresponding direction.

Moving and Sizing Objects



Moving and Sizing Objects

You can reposition any selected object or change its size. While in editing mode, these steps can be undone with the menu command **Edit > Undo**. This can also be accomplished by using the shortcut CTRL+Z or ALT+BACKSPACE.

If multiple objects are selected these can be changed simultaneously, as with a single object.

See also:

- ▶ [Changing Size](#)
- ▶ [Repositioning an Object](#)
- ▶ [Changing Size and Position via Dialog](#)
- ▶ [Repositioning and Changing Size via the Keyboard](#)



Changing Size

- Select the desired object.
- When the mouse pointer is placed over the frame, it changes into a bi-directional arrow. The size can be changed by depressing the left mouse button and pulling in one of the displayed directions. To simultaneously change the objects size in both the horizontal and vertical, the mouse pointer must be placed in one of the corners of the object frame.
- While dragging the mouse pointer, a frame is created, which reflects the new size of the object.
- Release the mouse button when the object has reached the required size.

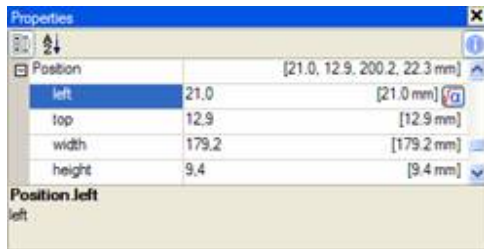


Repositioning an Object

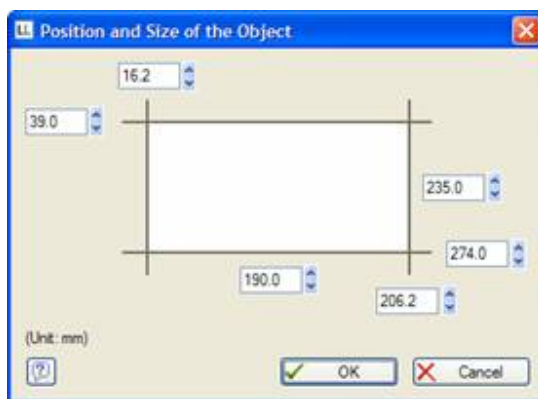
- Select the object you require.
- Click into the object to reposition it. If the mouse pointer is positioned over the selection frame, a four directional arrow will be displayed.
- Release the mouse button when the object has reached the position you require.



Changing Size and Position via Dialog



You can change the size and/or position of an object in the Property List. Please note that changing an entry will cause the automatic recalculation of all other related values.



If you double-click on the subcategory "**Position**" in the Property List a position and size dialog opens. Using this dialog, the defining of the size and position of an object using the keyboard is simplified.



Repositioning and Changing Size via the Keyboard

In addition to the mouse and position dialog, objects can also be repositioned on the workspace via the keyboard.

- Select the object you wish to reposition.
- Use the cursor-keys to move the object in the direction you require. Press the key once and the object moves 1/10 millimeter, if the shift-Key is also held, the object is moved by 1 millimeter.
- Use the ctrl and cursor keys for fine adaptation of the object's size
- Use the shift, ctrl and cursor keys for a quick adaptation of the object's size.



Grouping Objects

Multiple objects belonging together can be combined into a group in order to be treated like a single object. Please note that an object can only be a member of one group. It is therefore not possible to combine groups into a larger group.

To combine two or more objects use the following procedure:

- Select the objects you require.
- Select the command Group from the Objects menu or from the context menu.
- To undo a grouping select the command Ungroup from the Objects menu.

Working with Layers



Working with Layers

These layers are especially helpful with complex or larger projects. For larger projects, it is suggested to relate the objects on each page (first page, following pages, last page) to their own layer. Because you can fade these layers in or out as required, every page of your project can be handled separately. Otherwise the objects of different pages would be overlapping and would make the treatment of single objects more difficult.

Selected objects can also be given appearance conditions in the layers window.

It can also be helpful for complex projects to relate objects with the same appearance condition to one layer. Even the most complex forms can be created without losing control of your project.

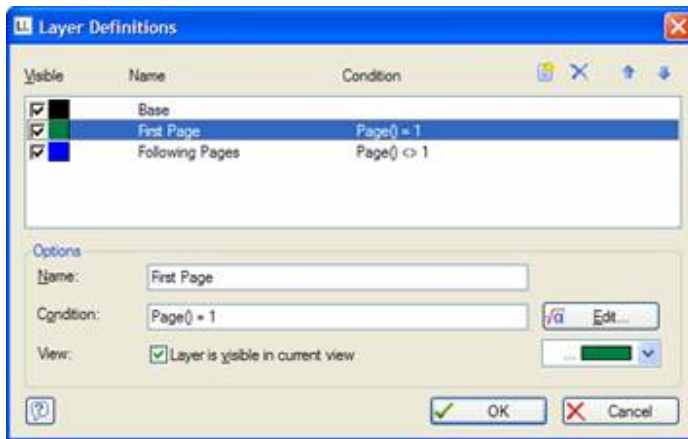
See also:

- ▶ [Defining Layers](#)
- ▶ [Assigning Layers](#)
- ▶ [Copying into Layers](#)
- ▶ [Switching Layers On/Off](#)

Defining Layers



Defining Layers



Layers can be defined using the command **Project > Layer Definitions** or by using the command **Layer Definitions** in the context menu of Layers tool window. The defined layers apply to the current project.

See also:

- ▶ Inserting, Deleting and Editing Layers
- ▶ Appearance Conditions for Layers



Inserting, Deleting and Editing Layers

In the layers window of the InLoox Designer at least one layer is defined which is called "**Basic**". When new projects are created, the layers "**Basic**", "**First Page**" and "**Following Pages**" are automatically defined.

- By using the "**New**" button you can define further layers.

Each new layer is initially presented with the name "**Layer**". You should enter a name for the new layer in the "**Name**" field that is easily identifiable. By using the Option "**Layer is visible in current view**" you can define whether the new layer is visible in the workspace or not.

To easily distinguish between the various layers on your workspace we recommend that you give the various layers different colors. All objects on one layer are then displayed in that color. The color has, of course, no effect on the actual print.

- To remove a layer that is no longer required select the corresponding layer and press the "**Delete**" button.

If the layer you wish to delete contains objects, they are automatically moved to the basic layer. In this manner you cannot lose any objects by deleting layers.



Appearance Conditions for Layers

You can define appearance conditions for each layer that define under which conditions the layer should be printed. These appearance conditions correspond to all objects of a particular layer.

Appearance conditions for single objects are given via the command **Objects > Appearance Condition**.

The appearance condition for a layer can be entered directly in the field "**Condition**", as long as you are familiar with the syntax. With the "**Edit**" button, however, it is possible for you to open the formula wizard, in which you can combine variables, text, and functions with any expressions. Further information can be found in Chapter 2.8 "Variables, Formulas, and Expressions".

Typical appearance conditions for layers are those that allow objects of a layer to appear only on certain pages.

Condition	Description
no condition	The objects on this layer always appear
Page() $=$ 1	The objects on this layer appear only on the first page.
Page() $>$ 1	The objects on this layer appear on all except the first page.

Additionally, logical expressions can be used as appearance conditions.

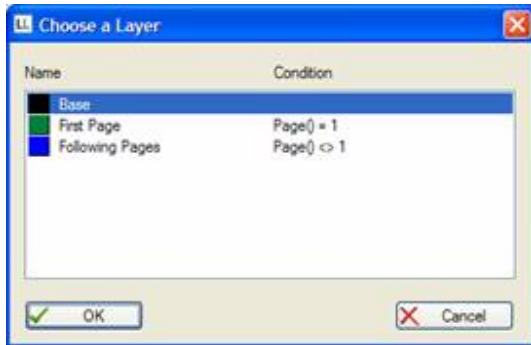
The function LastPage() can only be correctly analyzed when it is used within the footer of a table object or in objects that are linked to a table. Within the data line the result of LastPage() is always "False".



Assigning Layers

The currently selected objects can be assigned to the different layers on the workspace.

Select the objects which you wish to assign to a particular layer, and then select the command **Assign to Layer** from the **Objects** menu or the context menu. A list with the defined layers will appear. Select the desired layer.



Double-click on the required layer to assign the selected objects to it. Alternatively, you can also click on the required layer and then confirm the dialog with "OK".

The assigned objects automatically appear in the color of the corresponding layer on the workspace. This however only applies to the appearance on the workspace.



Copying into Layers

The Designer allows you not only to assign objects to layers but also to copy existing objects into layers.

The original object stays on its layer. A copy of the object is made on the target layer.

To copy one or more selected objects into a certain appearance layer, select the command **Copy to Layer** from the **Objects** menu or from the context menu. This is practical, for example, when you wish to use many similar objects in various layers.



Switching Layers On/Off



The only objects that are displayed on the workspace are those that are assigned to layers that are turned "on".

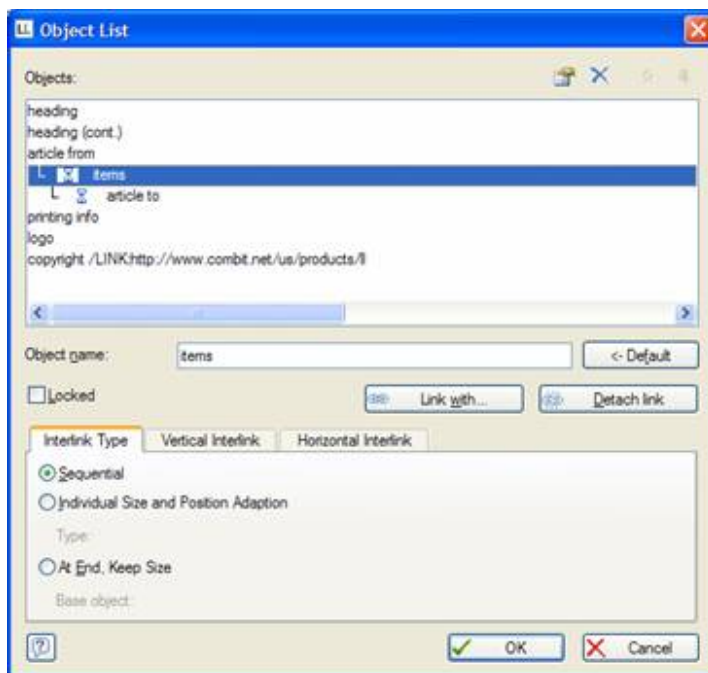
You can turn layers on and off by double-clicking on the corresponding layer in the layers window or by clicking directly on the checkbox corresponding to the layer.

Depending on which option you have set on the card "**Preview**" (in the Options dialog via the option "**Only Visible Layers**"), either only those layers which are turned on will be displayed in the preview window, or all layers.



Object List

By using the command **Objects > Object List** or the shortcut NUM* (key * in the number pad) a dialog with a list of all available objects is opened. This dialog contains the Object List, the appropriate to window, and features added functionality.



Interlinking objects**Interlinking objects**

By interlinking objects, you can set that some objects are printed after other objects and that they superpose when they overlap ("sequential interlinking") or that some objects adjust in size and position responding to changes in other objects ("spatial interlinking").

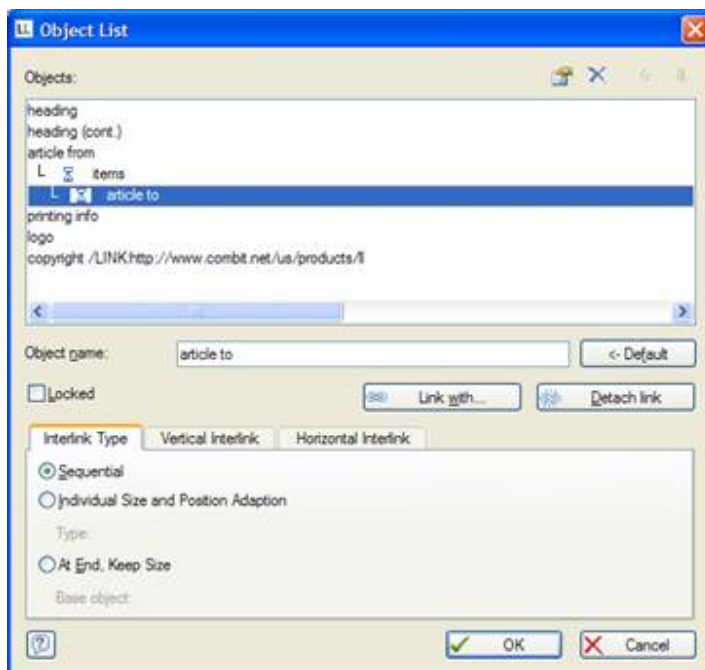
There are three types of interlinking:

- Sequential
- Individual Size and Position Adaption
- At End, Keep Size

When interlinking the objects there is a hierarchy: the parent object and the attached (interlinked) object.

Select **Objects > Object List** to create a interlink. With the button "Link with...", you can interlink other objects to the object selected in the object list. A list of objects available to be linked will appear. Select the object that you wish to attach to the object selected in the object list. The tree structure visualizes the interlinks. To attach several objects to an object, repeat the steps described above.

As soon as an interlinked object in the object list is selected - e.g. by clicking it with the mouse - various types of interlink are made available in the "Interlink" field, which will be described more closely hereafter.

**See also:**

- ▶ Detaching Interlinks
- ▶ Individual Interlinking (Size and Position Adaption)
- ▶ The "At End, Keep Size" Interlink
- ▶ The "sequential" interlink
- ▶ Examples for Individual Interlinks

▶ Advanced Interlinking



Detaching Interlinks

If you have selected an interlinked object in the object list, the button "**Detach Link**" is available. Click "**Detach Link**" to break an existing link. The linked object will be displayed as a regular object in the object list.

Individual Interlinking (Size and Position Adaption)

*Individual Interlinking (Size and Position Adaption)*

Both types of interlinking are relating to the used space of the parent object, i.e. the linked object will be subordinated to the parent object spatially, which means it will be subordinated in position and size. This automatically creates a sequential link too.

If the parent object changes in size or position, e.g. because the variables contained within it take up less space than is available, the interlinked objects will automatically adjust to these changes.

Spatial interlinks are only effective if the size and position of the parent object change when the variables are replaced by the respective field contents. The objects can shrink, but not enlarge. Manual changes in the size and position of the parent object in the workspace have no effect on the interlinked objects.

Spatial interlinks are marked with a square symbol in the object list. For clarity, the type of interlink selected is displayed on the "Interlink Type" tab.

Example Invoice Print: An invoice generally consists of a table that shows the individual invoice line items on any number of pages. The first page should of course differ from the others because it also has a letterhead. Create an invisible frame on the base layer, which starts where the invoice table is to start on the following page and ends where the invoice table is to start on the first page. Assign the display property "Page() \neq 1" to the rectangle. The table is also created on the base layer. This starts below the rectangle object. Now link the table with the rectangle (parent object) and set the link types "Position Adaption: Vertical Relative to End" and "Size Adaption: Vertical Inverse Proportional".



The interlink type is selected under the "Vertical Interlink" and "Horizontal Interlink" tabs.

See also:

- ▶ Vertical Interlinking
- ▶ Horizontal Interlinking
- ▶ Position adaption
- ▶ Size adaption



Vertical Interlinking

The interlinked object adjusts in its position or height depending on the vertical position or size changes of the parent object. Which corner of the parent object is applicable for the position adaption of the linked object, depends on the option selected ("relative to Begin", "relative to End" or "to End" for the position, "proportional" or "inverse" for the size). If the parent object moves vertically, the interlinked object will move by the same distance in the same direction.



Horizontal Interlinking

The interlinked object adjusts in its position or width depending on the horizontal position or size changes of the parent object. Which corner of the parent object is applicable for the position adaption of the linked object, depends on the option selected ("relative to Begin", "relative to End" or "to End" for the position, "proportional" or "inverse" for the size). If the parent object moves horizontally, the interlinked object will move by the same distance in the same direction.

If both options "horizontal" and "vertical" are on, the linked object will adjust to both types of change of position of the parent object.

In any case, two completely different types of interlinking are available to you:



Position adaption

This adaption depends on the position of the parent object. If the parent object changes its position, the position of the linked object changes in the same way (depending on the additional options).

- Option "relative to Begin": The child object moves like the top left corner of the parent object.
- Option "relative to End": The child object moves like the bottom right corner of the parent object.
- Option "To End": The top edge of the child object starts at the end of the parent object, independent of its original position. This creates an implicit size change on the first page on which the child page is printed.



Size adaption

This is similar to the position adaption, but as the name suggests, this interlink depends on the size of the parent object, i.e. when the parent object changes in size, the interlinked object will also change its size (also dependent on the additional options).

- Option "proportional": The size of the child object changes in the same way as the parent object. If it becomes 1cm shorter, the child object also becomes 1cm shorter.
- Option "inverse": The size of the child object changes inversely proportional to the size of the parent object. This is an especially useful option: if the parent object becomes 1cm shorter, the child object becomes 1cm longer.



The "At End, Keep Size" Interlink

This type of interlinking is similar to the position adaption, but here the available space of the parent object is taken into consideration and the size of the linked object remains fixed. If you want to output a chart object after a table and know exactly what the chart object should look like, then you place it directly behind the table and link it "At End, Keep Size" with the table. Regardless of where the table ends, the chart object will always be output in its chosen size after the table. If there isn't enough space behind the table on the last page, then the chart object is printed on the next page to leave its size unchanged.

In this way, you can place several objects beneath each other (such as diagrams, pictures, etc.); the base object of the interlink is the first object in the interlink hierarchy with activated page break.

The linked object must overlap the parent object in the designer. It is important that the parent object is larger than the linked object in every situation, since the linked object always tries to take up the space that is left over from the original size of the parent object. If, in our example, the chart takes up more vertical space than the table, InLoox will make a page break after the table and try to print the chart on the next page, but still within the original area of the table. The chart will still not fit, and another page break will be triggered, which leads to a neverending loop when printing.





The "sequential" interlink

Sequential interlinks are useful when the linked object can only be filled with information once the parent object has been printed.

Example 1: You are writing text and want to have the number of letters and words written on every page counted. The linked object only knows this when the text (text object) has been printed. The sum can then be printed at the end of the page.

Example 2: You want a final text to be printed after a table, and give it the display condition "LastPage()". Because it is only certain what size it is after the table has been output, the final text can therefore only be printed once the table is finished. For this, you must sequentially link the table with the final text and the final text will then only print after the table.

Sequential interlinking is the default for linking objects. It is denoted with an hourglass symbol in the object list.

When the sequential interlink is selected, none of the options for position and size adaption are available in the interlink field.

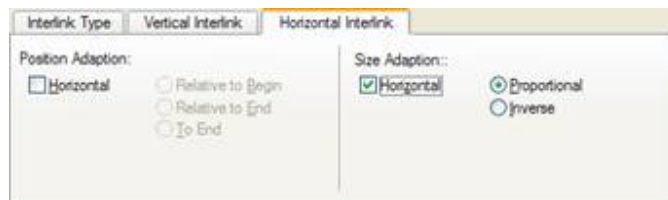
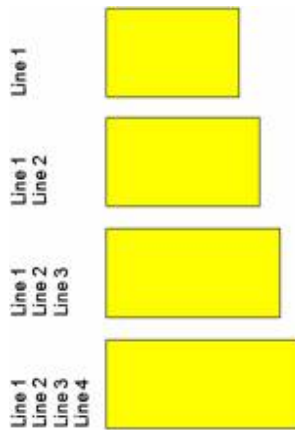
How and when to use the various interlinks is described in the following pages with examples.



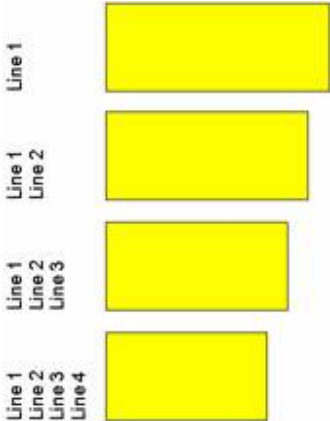
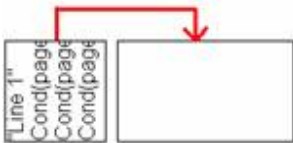


Examples for Individual Interlinks

Example interlink "Size Adaption: Horizontal Proportional": The linked object (rectangle) changes its size proportionally (in the same way) to changes in the parent object (text object). If the parent object becomes larger, the linked object will become larger by the same factor.

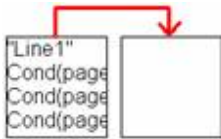


Example interlink "Size Adaption: Horizontal Inverse": The linked object (rectangle) changes inversely (in the opposite direction) to the parent object (text object). If the parent object becomes larger, the linked object becomes smaller.



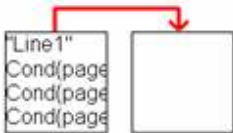
Interlink Type	Vertical Interlink	Horizontal Interlink
Position Adaption:	Size Adaption:	
<input type="checkbox"/> Horizontal	<input type="radio"/> Relative to Begin	<input checked="" type="checkbox"/> Horizontal
<input type="radio"/> Relative to End	<input type="radio"/> Proportional	<input checked="" type="radio"/> Inverse
<input type="radio"/> To End		

Example interlink " Size Adaption: Vertical Proportional": The linked object (rectangle) changes proportionally (in the same way) to the parent object (text object) in size. If the parent object gets a new row, the linked object becomes larger by the same dimension.



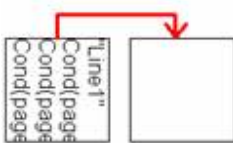
Interlink Type	Vertical Interlink	Horizontal Interlink
Position Adaption:	Size Adaption:	
<input checked="" type="checkbox"/> Vertical	<input type="radio"/> Relative to Begin	<input checked="" type="checkbox"/> Vertical
<input type="radio"/> Relative to End	<input checked="" type="radio"/> Proportional	<input type="radio"/> Inverse
<input type="radio"/> To End		

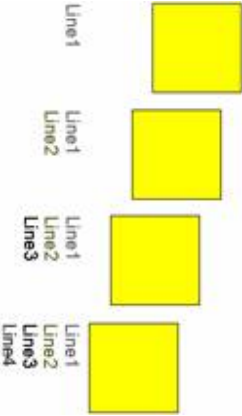
Example interlink " Size Adaption: Vertical Inverse": The linked object (dark rectangle), behaves inversely (in the opposite direction) to the parent object (text object), i.e. if the parent object gets a new row, the linked object will become smaller by the same dimension.



A screenshot of a configuration dialog for interlinks. It has two tabs: "Vertical Interlink" and "Horizontal Interlink". Under "Position Adaption:", the "Vertical" checkbox is checked. Under "Size Adaption:", the "Vertical" checkbox is checked, and the "Inverse" radio button is selected.

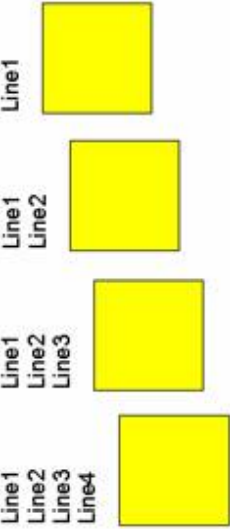
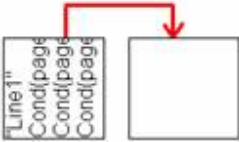
Example interlink "Position Adaption: Horizontal, Relative to Begin": The linked object (rectangle) changes in position depending on the top left corner of the parent object (text object). You can see that the linked object (rectangle) adjusts to the position of the parent object (text object). Because both objects are linked together "relative to begin", they behave in the opposite way to the "relative to end" interlink. Here, the parent object has been turned by 180° compared with "relative to end".





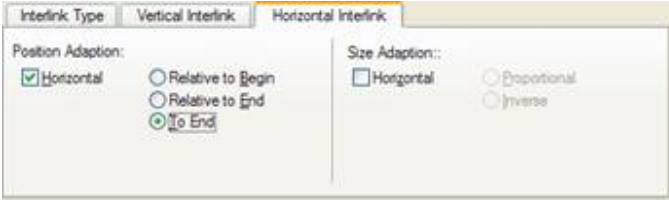
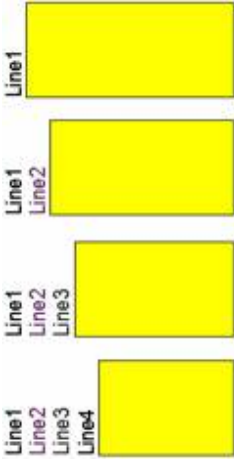
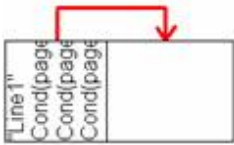
Interlink Type		Vertical Interlink	Horizontal Interlink
Position Adaption:		Size Adaption:	
<input checked="" type="checkbox"/> Horizontal	<input checked="" type="radio"/> Relative to Begin	<input checked="" type="checkbox"/> Horizontal	<input type="radio"/> Proportional
	<input type="radio"/> Relative to End		<input type="radio"/> Inverse
	<input type="radio"/> To End		

Example interlink "Position Adaption: Horizontal Relative to End": The linked object (rectangle) changes in position depending on the bottom right corner of the parent object (text object).

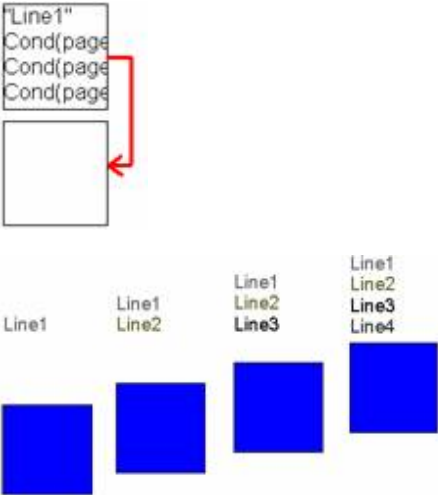




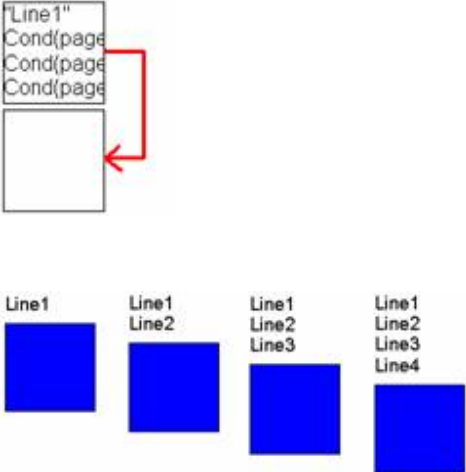
Example interlink "Position Adaption: Horizontal To End": The linked object (rectangle) changes its position depending on the parent object (text object). This brings about a change in size because the top edge of the linked object changes depending on the parent object, but the linked object does not change position. Therefore the linked object becomes smaller. The two linked objects must overlap (in the example, the text object is in the foreground), or this type of interlink has no effect.



Example interlink "Position Adaption: Vertical Relative to Begin": The linked object (rectangle) changes its position depending on the top left corner of the parent object (text object). With this link, it behaves exactly opposed to the "vertical relative to end" interlink: The parent object moves its position upwards because of the setting "Bottom aligned = True" in the designer and the linked object follows this position adaption from bottom to top.

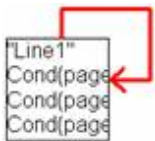


Example interlink "Position Adaption: Vertical Relative to End": The linked object (rectangle) changes its position depending on the top left corner of the parent object (text object). If the text object moves down a row, the dark rectangle moves downward proportionally too.





Example interlink "Position Adaption: Vertical To End": The linked object (rectangle) changes its position depending on the parent object (text object). This causes a change in size, since the top edge of the linked object will be changed because of the parent object but the position of the linked object does not change. The parent object moves down and the linked object only changes its position in that it shrinks. The linked object must overlap (in the example, the text is in the foreground), otherwise this type of interlink has no effect.



Advanced Interlinking



Advanced Interlinking

See also:

- ▶ The object list
- ▶ Objects with word wrap
- ▶ LastPage()



The object list

The object list creates an implicit print order of the objects, so it automatically creates a sequential interlink. Unlinked objects are printed first, followed by any objects that are linked in any way. This means sequential interlinking is only necessary in very specific cases, e.g. when an unlinked object is to be printed after the linked objects.



Objects with word wrap

InLoox objects on the base layer are normally printed on every page of a multi-page document. There are 4 exceptions to this: tables, text, formatted text and HTML.

These objects can cause a page break and are then printed over several pages. (The OLE container is not one of these, even though it can contain multi-page documents. Only the first page of the document is ever printed.)

Report Container / Table: is strictly only printed once per project.

Text, formatted text, HTML: These can be printed on several pages or on every page of the project. The selection is made with the object property "Page Break".



LastPage()


InLoox works through its print data sequentially. The application passes one "Data row" after the other and it is unknown during printing how much more data is still to come.

Therefore, it is difficult to find out if the last print page has been reached. The function `LastPage()` can for this reason only return "True" in very particular circumstances:

- in the footer of a table
- with an object linked with a table, as long as a page break has not occurred while printing the attached objects.

Common Object Properties**Common Object Properties**

Most properties can be defined using the Property list or additional dialogs. The properties for every object are different, but there are a series of characteristics that all object have in common, for example size, position, name and appearance conditions. The properties are described here once, and are not listed in the following chapters. The properties for individual objects are described in detail in the relevant subchapter of this Chapter.

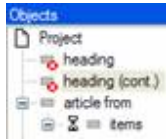
When a fixed list of values are available for a property, a button  will be available in the second column of the list. This button opens the list of predefined values for the property.

See also:

- ▶ Locked
- ▶ Name
- ▶ Appearance Condition
- ▶ Pagewrap Before Object Output
- ▶ Position
- ▶ Frame / Background
- ▶ Colors
- ▶ Pattern
- ▶ Filled / Background
- ▶ Formatting
- ▶ Font
- ▶ "Contents" of Objects



Locked



Protects an object from being selected accidentally by a mouse click. This property is only relevant for the design and has no effect upon the print. If an object is locked it can no longer be selected in the workspace and will be marked with a small red icon in the Object List.

Tip: A locked object can, still, be selected in the Object List for editing.

Since "**Locked**" is only relevant for the design phase of a project, there is no possibility to define the value of this property using formulas.

Property	Description	Value	Description
Locked	Protects the object from accidental selection in the workspace through a mouse click	True	Locked
		False	Unlocked



Name

When you insert a new object onto the workspace, an object description appears in the right segment of the status bar. The description is made up of the object's type and coordinates. This is the default name for the object.

If, however, you have a large number of similar objects in your project, these descriptions can quickly become confusing. For this reason, you can give the object a meaningful name using the tool window **Objects** or the object's Property List. In the Property List, click once on the current name to change it.

Alternatively, you can change the object's name by using the command **Objects > Object List** or in the Property field.

Property	Description	Value	Description
Name	Object Name	Name	

The object name is - unlike most properties - a fixed string, thus needing no quotation marks for a fixed text. If you have activated the option **Options > Workspace > Object Info**, the object name will be displayed in the tool tip, when the mouse is over the object.



Appearance Condition

An appearance condition can be set for every object, which defines under which conditions the object will be printed. These appearance conditions are listed in the Property List under the category "**Layout**". You will find guidance for the definition of these conditions in Chapter "Variables, Formulas and Expressions".

Property	Description	Value	Description
Appearance Condition	Appearance condition for printing. The object will not be printed in the result is "False".	True	Display
		False	Do not display
		Formula	Formula dialog



Pagewrap Before Object Output

Every object may initiate a page wrap prior to being printed; this means that the object will be printed on a new page.

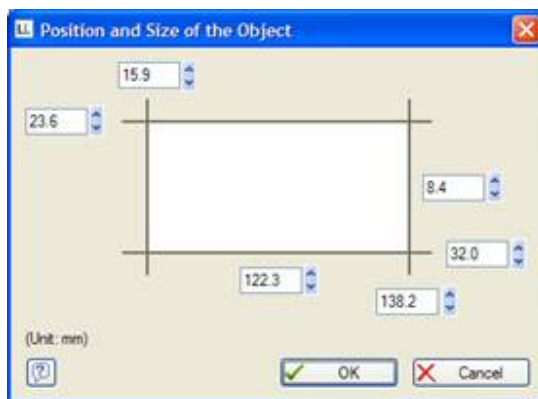
Property	Description	Value	Description
Pagewrap Before	If the condition returns "True", a page wrap will be initiated before printing the object.	True	Break
		False	No break
		Formula	Formula dialog



Position

The property group **"Position"** of an object defines the x- and y- coordinates of its upper left corner, the object width and the object height.


Property	Description	Value	Description
Position	Position and size of the object. All data is entered in the units used on the workspace		Position dialog
Left	Horizontal offset of the upper left corner of the object relative to the upper left corner of the workspace	Number	
		Formula	Formula dialog
Top	Vertical offset of the upper left corner of the object with the upper left corner of the workspace	Number	
		Formula	Formula dialog
Width	Object width	Number	
		Formula	Formula dialog
Height	Object height	Number	
		Formula	Formula dialog

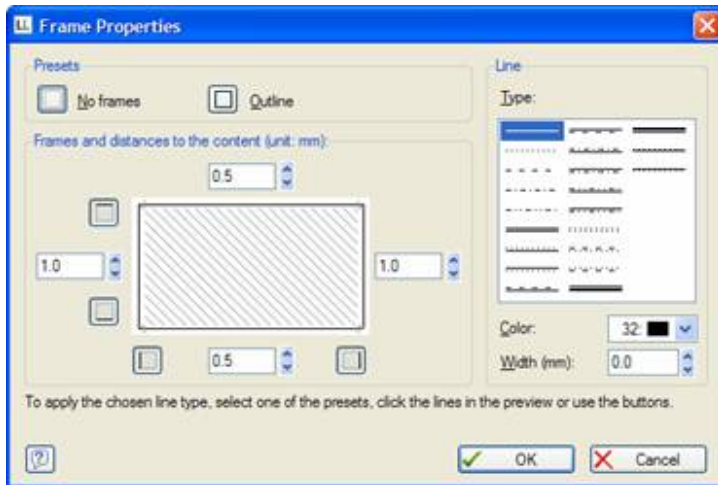




Frame / Background

The property group "Frame" defines the frame properties and the content's distances from the frames. It is available for many objects and sub-objects (e.g. table columns).

Property	Description	Value	Description
Frame	Frame properties and offset can be defined in a dialog:		Frame Dialog
Default (in sub-objects)	When true, the default frame is used, which is defined in the object's base properties.	True	Use default
		False	Use custom
		Formula	Formula Dialog
Layout	Describes the type of line draw order being used with frames with more than one line on it's sides.	0	Surrounding
		1	Horiz. Priority
		2	Vert. Priority
		Formula	Formula Dialog
left/top right/bottom	Settings for the individual frame lines.		
Distance	Distance between the contents and frame.	Number	
		Formula	Formula Dialog
Line	Visibility of the frame line.	True	Line
		False	No Line
		Formula	Formula Dialog
Color	Choice of the line color (see Colors)		
Line Type	Choice of the line type.	Choice of pre-defined lines (20)	Choice of pre-defined lines (20)
		Formula	Formula Dialog
Width	Line Width	Number	
		Formula	Formula Dialog



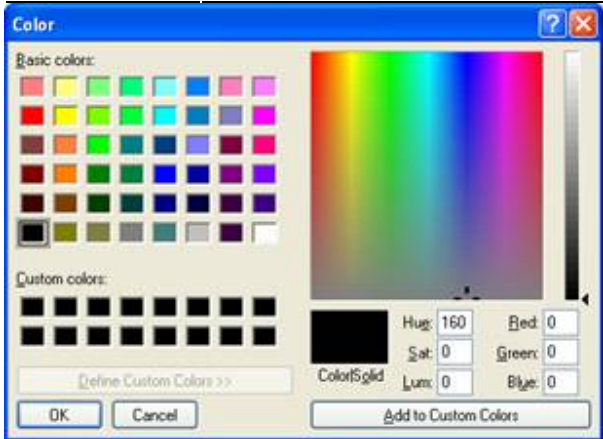


Colors

Colors are always defined in the Property List in the same way.

Property	Description	Value	Description
Color	The color can be selected from either the list of predefined colors or by using a formula. (1) The color consists of a Hue, Saturation and Lightness portion and is selected using the HSL function. (2) The color consists of a red, green and blue portion and is selected using the RGB function. Each color portion can assume a value between 0 and 255. 0 denotes no portion of this color, 255 denotes full color saturation. The three portions are mixed additively, with RGB (0, 0, 0) denoting black, RGB (255,255,255) white.		Choice of predefined colors and the Formula dialog
			Color dialog

(3) A color dialog is also available.



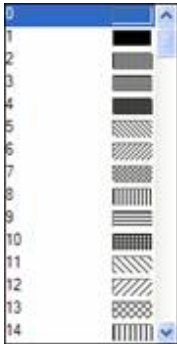


Pattern

With the pattern property you can define the texture of a color. This property is available with the background colors of table rows and drawn objects and is shown in combination with the color property.

Property	Description	Value	Description
Pattern	Choose a pattern from many predefined patterns. A value is always defining a pattern.	Number Formula	Predefined sample formula dialog

This property is only analyzed if "Filled" is set to "True".

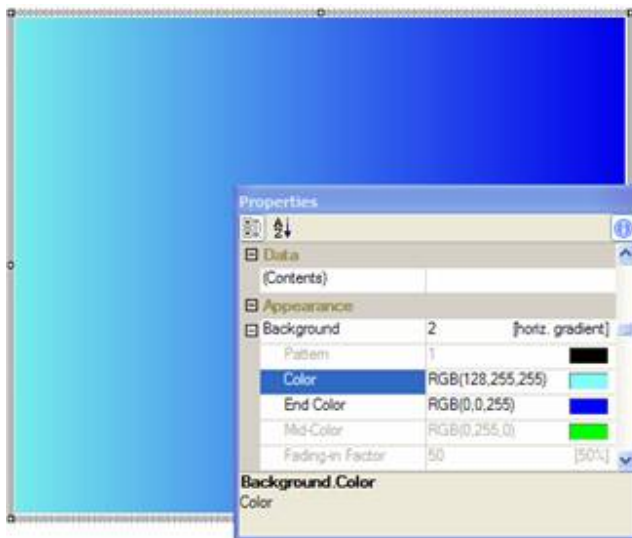




Filled / Background

With the property Filled a color gradient can be set for the object fill. This property can be found, for example, for the crosstab background, table background, ellipse and rectangle.

Property	Description	Value	Description
Filled / Background	Select the type of gradient and set its color, end color and mid-color. The property color, end color, mid-color is only used when "Filled" or "Background" are set to a value [2...5].	0	transparent
		1	Pattern/block color
		2	horiz. gradient
		3	vert. gradient
		4	vert. gradient
		5	horiz. two-part gradient
		Formula	vert. two-part gradient
	Formula Editor		



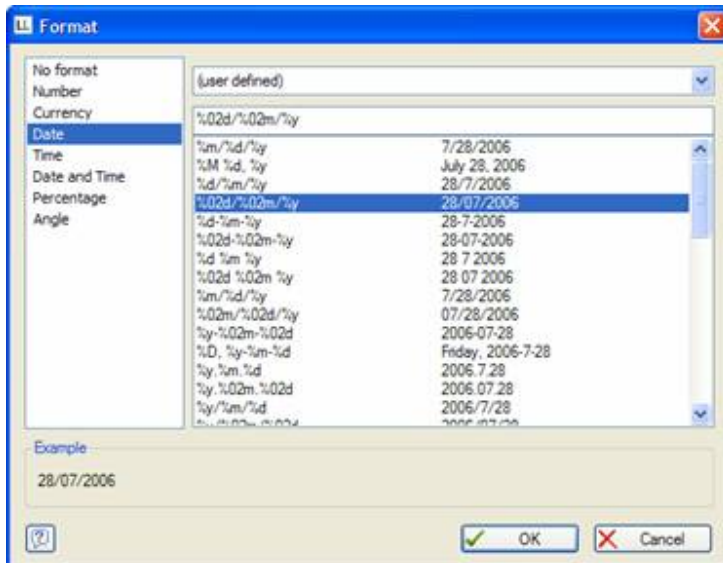


Formatting

The format editor is an alternative to formatting with the functions Date\$() and FStr\$() in the formula dialog. With the format editor you can set the format for numbers, currency, date, time, percentage and angle. By default, the system settings are used.

This property can be found, for example, in text, crosstab and table fields.


Note that the formatting will affect the expression's result. If you only wish to format certain parts of an expression (e.g. for text and numbers within one expression) use the functions Date\$() and FStr\$() in the formula dialog.



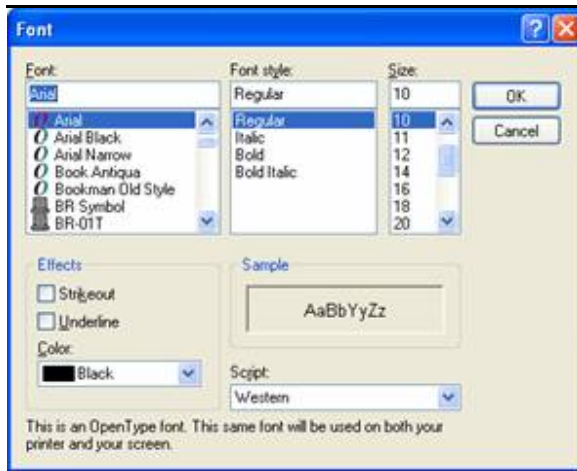


Font

The font properties can be defined in a dialog. If **Default** is set to True, the default font is used. You can define the default font by selecting the command **Project > Options**. Default values set on the card "**Objects**" are valid for all new objects, until they are changed. In the "**Object Font**" group you can define the font for each newly inserted object, using the "**Select**" button. With the button "default" in the object properties the font can be adjusted to a predefined system font. The settings also affect all objects which were not changed manually to a non default font.

Property	Description	Value	Description
Font	The font properties can be defined in a dialog. If Default is set to True, the default font is used.		Font dialog
Default	The default font is used instead of the one set	True	Default font
		False	No
		Formula	Formula dialog
Name	Selection of font. All installed fonts are displayed.	List	Font
		Formula	Formula dialog
Character set	Sets the country version of the character set. All available character sets are displayed.	Number	Character set
Size	Size of the font in points. Shows a list of the available sizes of the selected font.	Number	Default size
		Formula	Formula dialog
Width	Sets the width of the font 0 means standard width, otherwise the average character width will be used.	Number	Width
		Formula	Formula dialog
Bold	Turns on or off the text setting "Bold"	True	Yes
		False	No
		Formula	Formula dialog
Italic	Turns on or off the text setting "Italic"	True	Yes
		False	No
		Formula	Formula dialog
Underline	Turns on or off the text setting "Underlined"	True	Yes
		False	No
		Formula	Formula

		Formula	dialog
Strikeout	Turns on or off the text setting "Strikeout"	True	Yes
		False	No
		Formula	Formula dialog
Color	Font color		Color dialog Selection of predefined colors





"Contents" of Objects



Objects that contain sub-objects, for example a text field that contains multiple paragraphs, can have additional properties defined that may not appear in the Property List window.

To edit the contents of these objects, select the object and use the command **Contents** in the **Objects** menu or in the **Context menu**, or by using the properties button in the content property of the Property List. Often, you can also double-click on the object. These commands can not be used if a Contents dialog is not available for the selected object.

If available, a dialog window will open that may have a different appearance depending on the type of object.

You will find further information about the Contents dialogs for individual objects in the following Chapters.

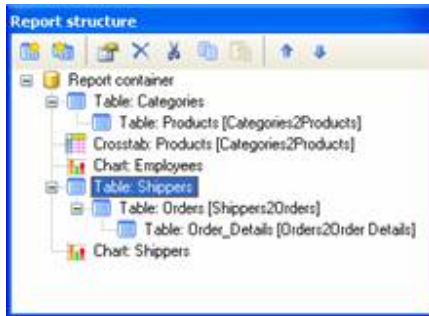
Report Structure



Report Structure

Multiple (sub)tables in the table object are only available when they are being used by an application that defines appropriate relationships.

A table object can contain various sub-tables. This means it is possible to define (sub)reports with almost any inter-table relationship.



See also:

- ▶ Characteristics of Elements
- ▶ Working with Report Structure



Characteristics of Elements

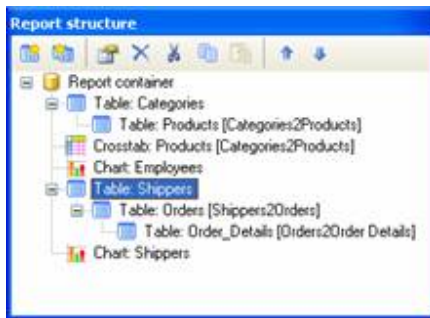
The base properties of objects will change when using multi tables. Some settings (e.g. "Locked") are only available with base objects. Others (e.g. "Fixed Size") are only available in sub tables. To view the properties of sub tables, select the table in the tool window "Table Structure". In addition to the table object properties, some other settings become available when using multi tables.

Property	Description	Value	Description
Separators	To easier align (sub)tables and columns accurately, you can show separator tick marks to the ruler.	True	Yes
		False	No
Distance before	Vertical distance from the previous table (does not apply when the table is at the beginning of a page).	Number	
		Formula	Formula dialog
Sorting	The order in which the table is presented. All available sorting choices are displayed in a list.	List of available sorting options.	
Pagewrap before	When the value "true" is returned, a page break will be initiated before the sub table is printed.	True	Wrap
		False	None
		Formula	Formula dialog

Working with Report Structure

*Working with Report Structure*

Further tables and sub-tables and the desired hierarchical structure can be defined in the tool window "Table Structure". Here you can see the layout of the entire project, e.g. on the highest level is the shipper, below this is the order, and on the lowest level the items of the order.



This can be continued as required. You can insert further tables, crosstabs and charts to fulfill almost any requirement. The table description is composed of the table name [relation name, sort name]. The most important commands for the various tables are available through context menus in the workspace, and a toolbar.

Using the buttons in the tool window, you can

- Attach a new table
- Attach a new sub table
- Delete, cut, copy and paste tables
- Change the sequence of the sub tables of the same hierarchical level

See also:

- ▶ [Inserting multi-table objects](#)
- ▶ [Attaching \(sub\)tables](#)
- ▶ [Example for relationally linked tables](#)
- ▶ [Headers and Footers in sub tables](#)



Inserting multi-table objects

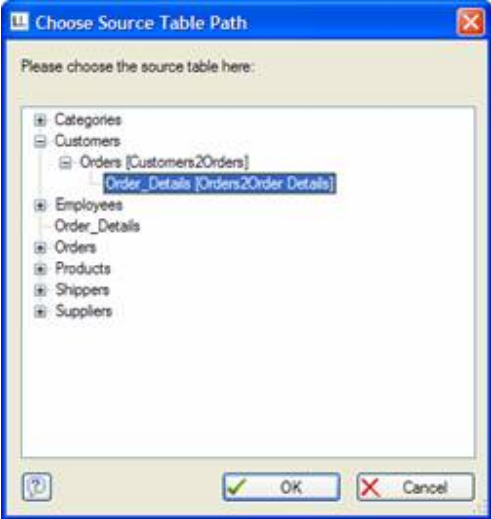
If there is more than one table available to use in your project, the options will be presented in a window when you try to create a table object. Simply choose the table type you wish to create.



When defining the table rows you will be assisted by the field selection assistant, in which only the fields of the selected table and its parent tables are available. It is possible to apply changes to multiple columns in one step. Further information regarding the field selection assistant and the definition of table contents can be found in [Define Column Contents](#). The representation of the fields in the variables window is automatically hierarchical, i.e. all fields of a database table can be found in its own subfolder.



Attaching (sub)tables





Example for relationally linked tables

You wish to create a list of all customers in which the orders of the customers and all ordered items are visible. In this situation, there are two 1:n relationships to consider:

1 customer has n orders

1 order has n items

Customers				
Pos	Company	Address	City	CustomerID
1	Alfreds Futterkiste	Obere Str. 57	Berlin	ALFKJ

Orders					
Pos	CustomerID	OrderDate	ShippedDate	Freight	OrderID
1	ALFKJ	08.01.1900	09.01.1900	29,46	10643

OrderDetails					
Pos	OrderID	ProductID	Quantity	ProductName	UnitPrice
1	10643	28	15	Rösle Sauerkraut	45,60 €
2	10643	39	21	Chartreuse verte	18,00 €
3	10643	46	2	Spegesild	12,00 €
total:					75,60 €

Orders					
Pos	CustomerID	OrderDate	ShippedDate	Freight	OrderID
1	ALFKJ	10.01.1900	10.01.1900	61,02	10692

OrderDetails					
Pos	OrderID	ProductID	Quantity	ProductName	UnitPrice
1	10692	63	20	Vegie-spread	43,90 €
total:					43,90 €



Headers and Footers in sub tables

When a table is wrapped to the next page, the headers of the currently active table and the outermost table are printed again. To prevent the headers from being reprinted on the next page, use the function `FirstHeaderThisTable()` as appearance condition.

The same functionality exists with footers. Use the function `LastFooterThisTable()` as the appearance condition. When using this, the footer will only be printed on the last table page if the table is wrapped to the next page.

Inserting Text Objects



Inserting Text Objects



Text objects are used to place text in the workspace. In addition to fixed text, you can also use place holders (variables) such as page number, date, company name, etc. that are made available by your application. These variables are then replaced during printing by their assigned contents.


Text objects can be inserted into your project using the command **Objects > Insert > Text** or the shortcut CTRL+T.

See also:

- ▶ Properties
- ▶ Text Contents
- ▶ Editing Paragraphs
- ▶ The Card "Tab"
- ▶ Paragraph Properties



Properties

Property	Description	Value	Description
(Contents)	Opens the Contents dialog		Opens dialog
Bottom Aligned	Alignment at the bottom of and within the object frame. If this option is activated the object's text will be aligned on the lower edge, if not, on the upper edge. Requirement is that the paragraphs are not larger than the object. If so, the text will be clipped. This option is useful e.g. when text of an unknown length is to be placed at the bottom of a page.	True	Bottom Aligned
		False	Top Aligned
		Formula	Opens Formula dialog
Rotation	Rotates the object counter-clockwise. Please note that only TrueType fonts can be rotated.	0	0°
		1	90°
		2	180°
		3	270°
		Formula	Formula dialog
Background	This option allows text objects to be assigned a background color. When the value is "True", a background color can be selected using the "Color" option.	True	With background color
		False	without background color
		Formula	Formula dialog
Frame	Through this option it is possible to provide the text object with a frame. When the value is "True", frame properties can be defined by the options color, width and distance.	True	with frame
		False	no frame
		Formula	Formula dialog
Page break	Defines if the object can initiate a page break. If the property is activated contents that exceed the size of the object will automatically appear on the next page. This is useful for text objects that occupy multiple pages. With labels, the next label will not be started until all objects with this option have been printed on the current label. It is possible that this option cannot be used if page break is not supported by your application. If the expression's result is FALSE, the text will be reprinted on every page.	True	Page break
		False	No Page break
		Formula	Formula dialog



Text Contents

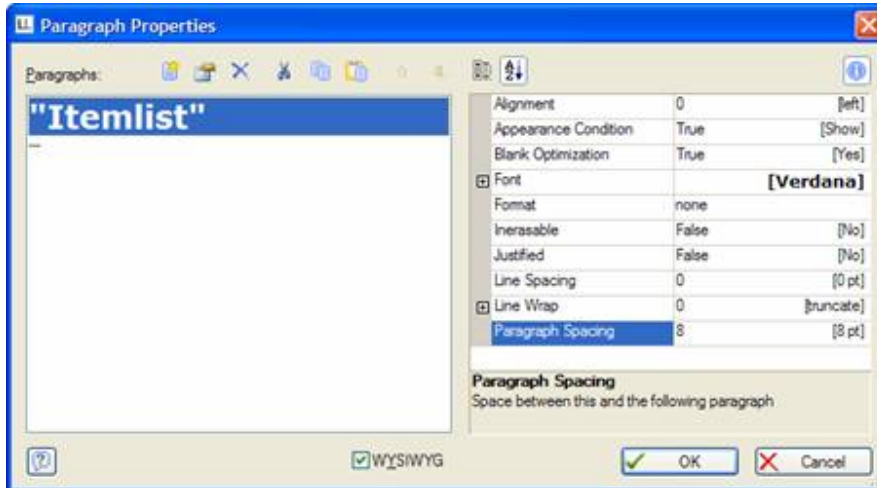
A text object can contain many paragraphs that may have totally different display properties. These paragraphs and their properties are the contents of a text object.

The paragraphs can be individually edited in the Paragraph Properties dialog.

Editing Paragraphs

*Editing Paragraphs*

Text objects are paragraph oriented, this means that each paragraph can be individually edited and formatted. By selecting multiple paragraphs, you can edit their properties simultaneously.



With these buttons you can:

- insert a paragraph
- edit the selected paragraph(s)
- delete the selected paragraph(s)
- copy the paragraph to the clipboard and then delete
- copy the paragraph to the clipboard
- insert paragraphs/text from the clipboard
- move paragraphs up
- move paragraphs down

You can also insert new paragraphs using drag & drop from the variable list.

Such an expression can contain fixed text, a variable, a function or any combination of these elements.

See also:

- ▶ WYSIWYG
- ▶ Edit Paragraph



WYSIWYG

If the option "**WYSIWYG**" is selected, the fonts for the individual lines will be displayed in the dialog as you have formatted them. If the option is not selected, then a standard font will be used and special formatting such as size or color will not be displayed in the paragraph list.



Edit Paragraph

A paragraph can be edited by clicking on the appropriate button or by double-clicking with the mouse on a paragraph in the paragraph list

This opens the Formula Editor that has an additional card "Tab" (see below). After you have defined the expression for the line, you can accept the line into your text object with the button "OK". You then automatically return to the dialog "Text Properties".

The Card "Tab"



The Card "Tab"

When a text contains a tab, e.g. by inserting it in the "Text" card, the "Tab" card specifies the tab alignment options. You can set both the alignment and position of the tabulator.

See also:

- ▶ Tabulator Alignment
- ▶ Tabulator Position



Tabulator Alignment

A tabulator causes the preceding text to run, to a maximum, to the tab stop. If the option "**Line Wrap**" in the Paragraph Properties is selected, the text will be wrapped into the next line, if necessary. Otherwise, the text will be cut.

The text after the tabulator will be wrapped, dependent on the type of tab stop, if the paragraph property "Line Wrap" is selected:

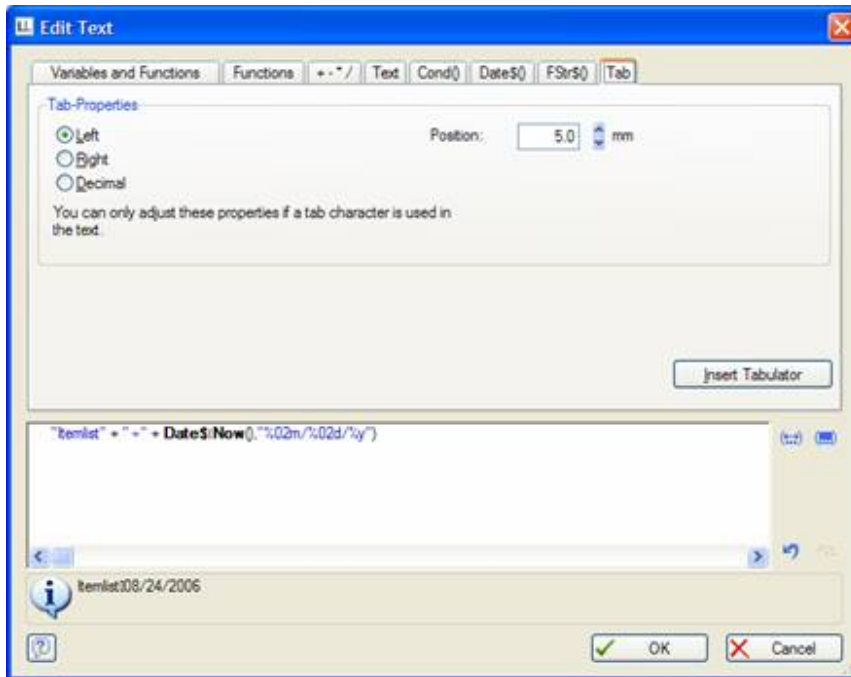
- Left justified: the text is left justified in the area between the tabulator and the right edge of the object.
- Right justified: the text is right justified in the area between the tabulator and the right edge of the object.
- Decimal: the number after the tabulator will be aligned on the decimal tabulator. (Note: Text or numbers in front of a decimal tabulator will not be wrapped!).



Tabulator Position

The tabulator's position within the selected object is given in the current unit. A positive value signifies that the position is calculated from the left edge of the text object. A negative value defines the position relative to the right edge of the text object.

A position of "50" indicates that the text in front of the tabulator will run to a maximum of 50 in the current unit from the left edge of the text object, after which it will be either wrapped or cut. Text following the tabulator will start at a distance of 50 in the current unit from the left edge of the object and run to a maximum to the right edge of the object.





Paragraph Properties


A paragraph's properties are defined using a Property List whose functioning is identical to the tool window "Properties".

Property	Description	Value	Description
Paragraph spacing	Space between paragraphs ("paragraph end spacing"), vertical blank space The spacing is entered in points: To achieve a 1.5 line spacing with a 10 point font, enter 5 points. Negative values are allowed.	Number	
		Formula	Formula Dialog
Alignment	Here you can, exactly as in word processing, define the alignment of individual lines of text.	0	left
		1	centered
		2	right
		Formula	Formula dialog
Block	Block text is both left and right justified. This property is only functional when the selected line is wrapped. This means that the line must be longer than the available space, consist of multiple words and the option " Line Wrap " selected. The last line will be displayed in accordance with the property " Alignment ".	True	Yes
		False	No
		Formula	Formula dialog
Format	The format editor is available in text object paragraphs and in table columns and is an alternative to formatting with the functions Date\$() and FStr\$() in the formula dialog. Using the format editor, you can set the format for numbers, currency, dates, times, percentages and angles. By default, the computer's system settings are used. Note that the format settings affect the entire expression. If you only wish to format certain sections of the expression (e.g. some text and numbers within the expression) use the functions Date\$() and FStr\$() in the formula dialog.	True	Dialog
		False	
Blank-Optimization	Blank-optimization can remove undesired spaces (leading, enclosed and remaining). Imagine that you wish to print a label project using the following variables which are to be separated with a space: <TITLE> <FIRSTNAME> <LASTNAME> If there is a record in which no title exists, this variable would remain empty but the following space would be printed. First name and Last name appear with a leading space. If, for example, the variable "Firstname" was empty, there would be two spaces between "Title" and	True	Yes
		False	No
		Formula	Formula dialog

"Lastname" (enclosed spaces).

If all three variables were empty, both spaces would remain (remaining spaces). This line is then not empty and would not be automatically ignored.

In these cases, the option "Space-Optimization" assists in the automatic removal of leading, enclosed and remaining spaces. Multiple enclosed spaces will be automatically reduced to one space.

Font	If default is set, the default font will be used. The Font Definition dialog can be opened using the font button. All properties in this properties group can be set in one dialog.		Font dialog
Default	Default font will be used instead of the set values. You can define the default font by selecting the command Project > Options . Default values set on the card " Objects " are valid for all new objects, until they are changed.	True	Default font
		False	No
		Formula	Formula dialog
Name	The name of the font.	Fonts list	
Character Set	Defines country interpretation of the character set.	Number	Character set
Size	Font size in points. A list of available sizes for the selected font will be shown.	Number	Predefined size
		Formula	Formula Dialog
Font Width	Font width. 0 signifies standard width; otherwise the average character width will be used. Other values define a "run width" which narrows or enlarge the character.	Number	Width
		Formula	Formula Dialog
Bold	Sets / Resets s the text property " Bold "	True	Yes
		False	No
		Formula	Formula dialog
Italic	Sets / Resets the text property " I talic "	True	Yes
		False	No
		Formula	Formula dialog
Underlined	Sets / Resets the text property " Underlined "	True	Yes
		False	No
		Formula	Formula dialog
Strike Out	Sets / Resets the text property " Strike Out "	True	Yes

		False	No
		Formula	Formula dialog
Uneraseable	Lines that remain completely empty will be ignored. The following lines will be moved up. This usually comes handy, but at times can be undesirable. With the option " Uneraseable " the empty line will remain if it would be empty after use of the variable.	True	Yes
		False	No
		Formula	Formula dialog
Line Spacing	Line spacing defines the space between individual lines of a paragraph. The spacing is entered in points: To achieve a spacing of 1.5 lines with a 10 point font, enter the value 5. Negative values are also allowed.	Number	
		Formula	Formula dialog
Line Wrap	Determines the behavior, if the text becomes too long for a line. If the text consists not of several words, but only of a long word, it is cut off likewise at value "1".	0	Truncate
		1	Wrap
		2	Shrink
		3	Compress
		Formula	Formula dialog
Keep Together	With this property you define whether the paragraph will be kept together during a page break.	True	Wrap
		False	Keep together
		Formula	

Inserting Lines



Inserting Lines



To create a line object, select **Objects > Insert > Line** (CTRL+L).

See also:

▸ [Properties](#)



Properties

Property	Description	Value	Description
Width	Line width in the measuring system used in workspace	Number	
		Formula	Formula dialog
Color, Appearance, Condition, Frame, Position, Pagewrap Before	See Chapter Common Object Properties		

Inserting Rectangles



Inserting Rectangles



To create a rectangle object, select **Objects > Insert > Rectangle** (CTRL+R).

See also:

▸ [Properties](#)



Properties

Property	Description	Value	Description
Filled	See Chapter Common Object Properties		
Border	Define whether the rectangle should have a border.	0	transparent
		1	pattern / block color
		Formula	Formula dialog
	Color	Color of the frame. See Chapter Common Object Properties	
	Width	Number	
		Formula	Formula dialog
Rounding	Rounding factor for the corners of the rectangle in %. 0% signifies angular 100% signifies: The corners of the rectangle are completely rounded.	Number	
		Formula	Formula dialog
Shadow	Define whether the rectangle should have a shadow.	0	transparent
		1	pattern / block color
		Formula	Formula dialog
		Pattern	Shadowpattern. See Chapter Common Object Properties
		Color	Shadowcolor. See Chapter Common Object Properties
	Width	Number	
		Formula	Formula dialog
Appearance Condition, Position, Pagewrap Before	See Chapter Common Object Properties		

Inserting Ellipses



Inserting Ellipses

Ellipse objects are also available, as a special type of ellipse, for the display of circles.



To create an ellipse object, select **Objects > Insert > Ellipse** (CTRL+I).

See also:

▶ [Properties](#)



Properties

Property	Description	Value	Description
Filled	Define if the ellipse object should be empty or if it should be filled with a pattern and/or color. See Chapter Common Object Properties		
Circle	Define if the ellipse should always be displayed as a circle centered in the.	True	Yes
		False	No
		Formula	Formula dialog
Border	Define if the ellipse should have a border.	0	transparent
		1	pattern / block color
		Formula	Formula dialog
	Color	Color of the frame. See Chapter Common Object Properties	
	Width	Number	
		Formula	Formula dialog
Appearance Condition, Position, Pagewrap Before	See Chapter Common Object Properties		

Inserting Picture Objects



Inserting Picture Objects






To create a drawing or picture object, select **Objects > Insert > Picture** (CTRL+D). All available formats are shown in the files dialog. If you evaluate a file name or a variable as data source, you can do these also by doubleclick on the object to select.

See also:

[Properties](#)



Properties

Property	Description	Value	Description
Data source	Select how the data source for the graphic to be displayed is defined.	File name	
		Formula	Formula dialog
		Variable	
File name	Existing file name, will be evaluated if file name was selected in the property "Source". Select the desired graphic in the Windows familiar dialog. In this dialog, by using the option "Imbed in Project", you have the capability to imbed the graphic file into your project. The file is then copied into your project and is available even though the file may be absent. In this case, embedded will be displayed instead of the file name.	File name 	File > Open dialog
Formula	The file name is the result of a formula, if formula was selected in the property "Source". The result of this formula must be a value of the type "Drawing". You can also enter a valid file name, but it must first be converted to a value of the type "Drawing" with the function Drawing().	Formula 	Formula dialog
Variable	The file name is the result of a variable, if variable was selected in the property "Source". Select the desired variable from the list box. In this box you will find all variables of the type "Drawing" that were defined in your application.	List of all variables of the type Drawing	
Properties	Dependent upon your application, a further dialog can be opened in which more properties can be defined.		Opens dialog
Keep proportions	Using this option, you define whether the graphic should be inserted so that the relationship between height and width is kept (True) or if the graphic should be adapted to fit the frame of the object (False).	True	Yes
		False	No
		Formula	Formula dialog
Appearance Condition, Frame, Position, Page wrap before	See Chapter Common Object Properties		

Inserting Barcode Objects



Inserting Barcode Objects



Barcodes can be used for product labels, price stickers, serial numbers and many other purposes. A barcode normally consists of a series of differently sized bars and spaces. The minimum bar size should be 0.3 mm, in InLoox the bar width relationship is set at 1:3.



You can find a description of the barcode formats in Chapter List of Available Barcodes. To create a barcode object select Objects > Insert > Barcode(CTRL+B).

See also:

- Properties
- Barcode Contents



Properties

Property	Description	Value	Description
(Contents)	Opens the "Contents" dialog		Opens dialog
Bar Color	Color for the selected Barcode See Chapter Colors		
Bar Width	The narrowest bar width in SCM units (1/1000 mm). 0=automatic adjustment. Not supported by all barcode types.	Formula	Formula dialog
	Orientation	Orientation of the barcode within the object frame.	
		0	left
		1	centered
		2	right
		Formula	Formula dialog
Bar Width Ratio	The ratio between the bars or spaces. Not supported by all barcode types.	Formula	Formula dialog
Rotation	Rotates the object counter clockwise	0	0°
		1	90°
		2	180°
		3	270°
		Formula	Formula dialog
Optimum Size	Sets the optimum size for the Barcode. This property could affect size changes with the following formats: EAN 13 (all), DP-Leitcode, DP-Identcode, German Parcel, Postnet and FIM.	True	Yes
		False	No
		Formula	Formula dialog
Font	Font for the Barcode text. Will only be evaluated if the "Show Text" property is activated. If the default is set the default font will be used. The font definitions dialog can be opened by using the button. You can set all properties in this property group in a single dialog. See Chapter Common Object Properties.		Font dialog
Show Text	Define whether the contents of the barcode should also be displayed as clear text.	True	Yes
		False	No
		Formula	Formula dialog
Appearance Condition, Frame, Position, Page	See Chapter Common Object Properties.		


wrap before



Barcode Contents

You can further define the barcode object using the contents dialog.

- If you wish to print fixed text in barcode form, select the option "Text". Enter the value to be printed in the first field. Select your desired type of barcode in the second field. Please note that certain requirements (number of characters, or spaces) must be met for the selected type of barcode. If the requirements are not met you will receive an error message.

-  For some barcode types, for example Maxicode, additional options exist that can be edited in a further dialog. This dialog is opened with the button "Options".

- If you wish to use a formula as a barcode, select the option "Formula" and define a valid formula expression using the "Edit" button. The return value of the formula must be of the "Barcode" type. You can also enter variables, but they must first be converted to variables of the barcode type using the function Barcode().

- If you wish to print a variable in barcode form, select the option "Variable". All variables of the type Barcode will be displayed in a list box.

Barcode Contents

Data Source

Text 121234512345 EAN 13

Formula [Empty field] Edit...

Variable

Format(s): nn|nnnn|nnnnn, nn|nnnn|nnnn|n, nn|nnnn|nnnn|nnnn, nn|nnnn|nnnn, nn|nnnn|nnnn|n, nn|nnnn|nnnn|nnnn

Allowed characters: [0-9]

OK Cancel

Inserting Table objects

Inserting Table objects



In order to create lists, tables, reports or similar forms, you need a table object. To create a table object, select **Objects > Insert > Table** (CTRL+E).

In multi-tables you add a table object over the tool window report structure (See Chapter Report Structure).


See also:


- ▶ Properties
- ▶ Table Contents
- ▶ Definition of Table Lines
- ▶ Defining Line Layouts
- ▶ Editing the Line Definitions List
- ▶ Define Column Contents
- ▶ Format Lines
- ▶ Appearance Conditions for Table Lines
- ▶ Column Properties
- ▶ Defining Footer Lines
- ▶ Defining Group Lines
- ▶ Define Group Footers



Properties

Note: If the tool window "report structure" is available, other properties apply (See Chapter Report Structure.

Property	Description	Value	Description
(Contents)	Opens the "Contents" dialog		Opens dialog
Data lines			
Force Sums	Sums will be calculated even with the suppression of the data lines.	True	Yes
		False	No
		Formula	Formula dialog
Keep Together	If this property is activated, data lines will be kept together (if this is possible) after a page break. The lines will be printed on the next page.	True	Yes
		False	No
		Formula	Formula dialog
Suppress	If the option "Data Lines Suppress" is selected, all data lines will be completely suppressed. This option is especially useful in combination with the option "Force Sums". The last option defines that the sum will be calculated when the data line is not printed. With the combination of both options and the use of groups and sum variables, the printing of interesting statistics is possible.	True	Yes
		False	No
		Formula	Formula dialog
Zebra Pattern	With the option "Zebra pattern" in the "Data Lines" group, you can assign alternating colors to the data lines. This will improve the clarity of large tables.	True	Yes
		False	No
		Formula	Formula dialog
	Color	Color of the selected pattern. See Chapter Colors	
	Pattern	Number	Predefined pattern
		Formula	Formula dialog
Footer lines			
When using multi-tables, this setting is only available for sub-tables and not for the Report Container.			
Keep Together	With the property Footer Lines "Keep Together", you can define, simultaneously with the option Lines "Keep Together", that footer lines will be kept together	True	Yes
		False	No
		Formula	Formula

	during a page break, as far as is possible.	Formula	dialog
Group Footer Lines	Options for the Group Footer Lines. When using multi-tables, this setting is only available for sub-tables and not for the base object.		
	Also Empty Groups	Group Footer Lines will also be printed for empty groups	True Yes False No Formula Formula dialog
Group Header Lines	Options for the Group Header Lines. When using multi-tables, this setting is only available for sub-tables and not for the base object.		
	Keep Together	Using this option, you can define that group lines (intermediate headers) will not be separated from their data lines by a page break, if possible.	True Yes False No Formula Formula dialog
Fixed Size	If the property "Fixed Size" is selected, the table will not automatically adjust its size if less space is used than available. If the property is not selected, the bottom edge of the table object will automatically move up and will be printed directly underneath the last data line. If "Fixed Size" is false, the footer line will be located at the very bottom of the table objects rectangle. Please note: objects which may be linked to the table can only change their position automatically when "Fixed Size" is not selected. When using multi-tables, this setting is only available for sub-tables and not for the Report Container.	True Yes False No Formula Formula dialog	
	Separators Fixed	If this property is selected, the column separators will be continued from the last data line to the footer line. If this option is not selected, the column separators will reach only to the last data line. This option is only available for tables of "Fixed Size".	True Yes False No Formula Formula dialog
Locked	See Chapter Locked. When using multi-tables, this setting is only available for the Report Container and not for sub-tables.		
Background	This property allows you to assign a background to your table object. See Chapter Common Object Properties. When using multi-tables, this setting is only available for the Report Container and not for sub-tables.	True False Formula	Background color no background color Formula dialog
Default Font	With this property you can assign the default font for the table. The Font dialog can be opened using the appropriate button. See Chapter		Font dialog

Common Object Properties.

When using multi-tables, this setting is only available for the Report Container and not for sub-tables.


Default Frame	With this property you can assign the default frame for the table. See Chapter Common Object Properties.		Font dialog
Page wrap Conditions	Additionally, you can enter a condition which will cause a page wrap to be performed as soon as the condition is met.	True	Yes
		False	No
	If Page wrap = True, a page wrap will be performed after each line. If Page wrap = False, the page wrap will only be performed when necessary.	Formula	Formula dialog
Appearance Condition, Position, Page wrap before	See Chapter Common Object Properties.		



Table Contents

A table consists of various types of lines that can be defined independently of each other.

- There are header lines, data lines, footer lines, group header lines and group footer lines.
- Headers lines are most commonly used as a description for table columns.
- Data lines contain the formatting information for the data that is to be presented in the table.
- Footer lines are located at the end of the page/table and can contain further information about the data displayed in the table.
- Group header and footer lines can be used to further structure the data lines through the use of "intermediate headers" and "intermediate footers".

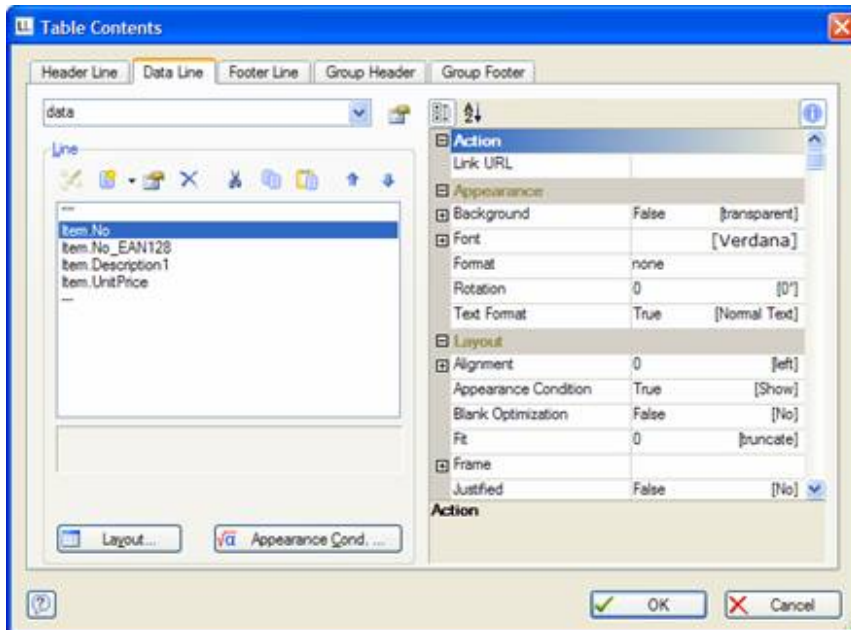
All line types can be defined independently of one another. The columns for a header line can have a different appearance than the data lines or footer lines. The header lines can have a completely different appearance than the following data or footer lines.

Various line layouts or definitions can be defined for the individual types of lines. Special appearance conditions can be activated, if needed, for the various line definitions.

In this way, "sub reports" (tables that contain sub-tables) can be created with a maximum of flexibility.

All line definitions are defined in the identical manner and consist of columns that can all be individually edited and formatted.

The individual lines types with their definitions and columns can be edited in the dialog "**Table Contents**".



A card is provided for the definition of every line type and the columns.

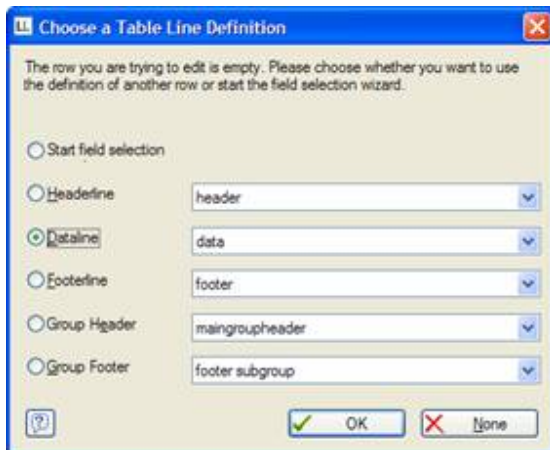


Definition of Table Lines

The procedure for the definition of the various table lines is always the same. Appropriately, the cards for the header, data, footer, group header and group footer lines have nearly the same appearance.

First, select the type of line to be edited by clicking on the appropriate card. If nothing has been defined for this type of line, you will be asked if you would like to use an existing line definition for the new line type.

If line definitions have been created, you can select the definitions to be used in the new line type.



In the example pictured above, the definition for line definition 1 was selected for use in the data line.

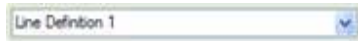
If you are creating a new table and no lines have been defined, this dialog will not appear.

You also have the possibility to copy one or more columns from one table to another or from one area of a table to another, using the clipboard.



Defining Line Layouts

Various layouts can be defined for each line type. In connection with the appearance conditions, and dependent upon the situation, the appropriate layout will be used. In this way, table lines for some records will appear in bold print while others are displayed normally. Or, under certain conditions, the table lines contain other columns.



For every line type, there are 100 - 150 different line definitions available.

To create multiple line layouts for a line, select the line definition that you would like to edit. If you have defined a layout for at least one line, you have the possibility of using the existing layout as a template for the new line layout.

As described in Chapter Define Column Contents, you can now define the columns, their contents and properties for the new layout. Using the button "**Layout**" you can define the complete appearance for the new line layout. You can define, for example, special frames.




Editing the Line Definitions List

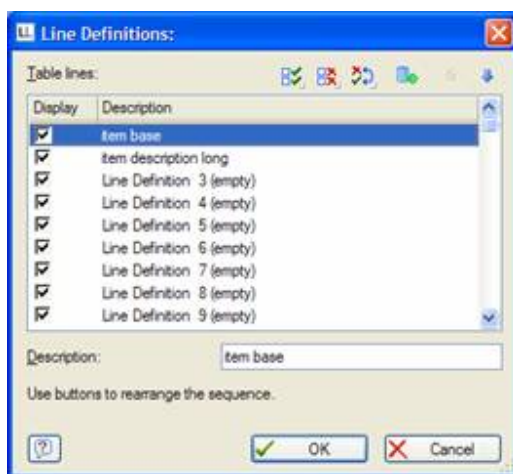


The Line Definitions list can be edited using the button "Properties".

You can assign names to the line definitions. This will make it easier for you to find the line in complex layouts.

The order of the line definitions in the list can be changed using the arrow buttons or per drag & drop. Line definitions can be compromised, that means that empty line definitions will be moved to the bottom of the list, by using the  button.

With the "Display" option you can hide single lines in the workspace. This is very useful when you have a lot of line definitions. The controls at the top of the dialog can be used to show/hide several highlighted lines in one step. By right-clicking the button, all the lines can be shown or hidden.



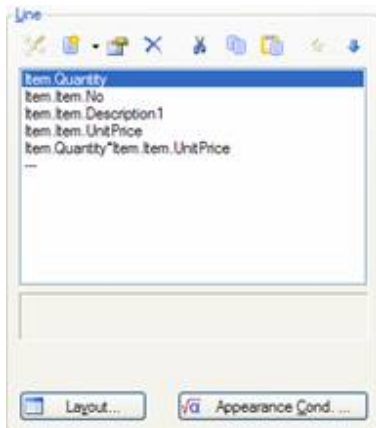
Define Column Contents

*Define Column Contents*


Table lines are column oriented, that means every line definition can contain many columns and every column can be separately edited and formatted.

Every column also has a definite type. The column types that are available are: Text, Drawing, Barcode, RTF-Text, Chart, HTML-Text and OLE Container.

Every column of a table object is represented by a line in the list. Multiple expressions or variables can appear within a column.



With the buttons you can:

- start up the field selection assistant
- insert a text column
- insert a column of a certain type, the  button opens an appropriate menu
- edit the selected column(s)
- delete the selected column(s)
- copy the selected columns to the clipboard and then delete them
- copy the selected columns to the clipboard
- insert columns from the clipboard
- move the selected columns to the left
- move the selected columns to the right

Editing of the column is done in the familiar Formula Editor, in which expressions can be defined as column contents, see Chapter Variables, Formulas and Expressions for more information".

See also:

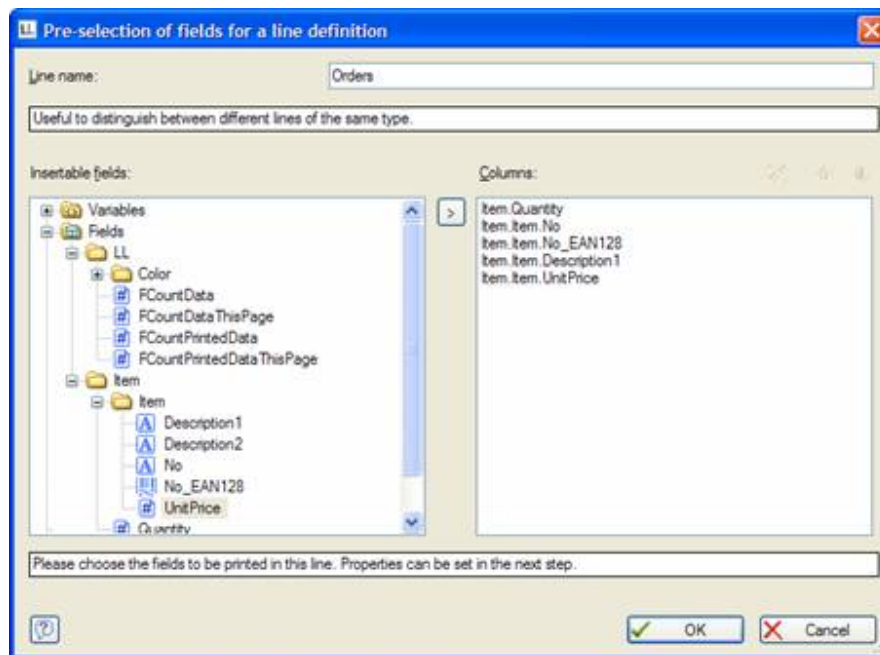
- The Field Selection Assistant



The Field Selection Assistant


The field selection assistant makes it easier to add new columns. With table objects, the assistant is able to:

- add several columns in a single step.
- assemble the columns using the available fields.





Format Lines

 **Layout...** With this button you can define the appearance of the current table line.

You can set the font preference for the complete line using the Select button. Newly inserted columns appear at the beginning in this font. Using the appropriate option in the Column Properties, you can select a different font for each column.

In the category "**Print Margins**", the margins that the table line should have within the table object can be set.


The margins "**Top**" and "**Bottom**" define the space between the individual lines of the table. A bottom margin of 3.0mm sets a space of 3mm between a line of the selected type and the following lines. When a top margin for the lines is additionally defined, the space between the lines will be resized appropriately. Each data line will be printed with the frame line settings in category "**Frame**".

With the margins "**Left**" and "**Right**", margins relative to the table object or to other table lines can be set. If you have, for example, defined a left margin of 10.0 for the header lines and a margin of 20.0 for the data lines, the data lines will be indented 10mm in relation to the header line.





Appearance Conditions for Table Lines

 Appearance conditions for the table lines can be assigned using the button "**Appearance Cond.**" Using this button opens the familiar dialog for the definition of logical expressions (see Chapter Variables, Formulas and Expressions).

These appearance conditions are valid in addition to the project specific appearance conditions assigned defined with **Project > Filter**.

Appearance conditions for table lines are especially meaningful when you define more than one layout for a table line. You can use appearance conditions to change between the various layouts.

If each table line is to be displayed with a single line layout, ensure that the various appearance conditions assigned to the individual lines cancel each other out. Otherwise the same record will appear repeatedly in the table, which means once for every line layout that fits the appearance conditions. Sometimes this may be desired, especially when the fields of a table are to be displayed over multiple lines.



Column Properties

The properties of a column are defined using a Property List, which is similar to the tool window **"Properties"**. The Property List may be different from column to column, depending on the type of column.

If more than one column is selected, the common properties can be edited all at once. Properties that are not common to all marked columns are not available for editing.

The column properties correspond to, with some table related restrictions, the properties of the appropriate object type.



Columns of the type **"Text"** and **"RTF-Text"** possess a special characteristic. These text variants can be, also using a column property, intertwined. Dependent upon this property, the property list is changed appropriately.

Property	Description	Value	Description
Text-Format	Defines the text column (normal text or RTF text).	True	Normal text
		False	RTF Text

In addition to the object properties, several properties are available for columns:

Property	Description	Value	Description	
Link URL	Link target (only effective for preview, PDF and HTML export).	Link		
		Formula	Formula dialog	
Vertical Alignment	With this option you define the vertical alignment of the selected column.	0	Top	
		1	Centered	
		2	Bottom	
		Formula	Formula dialog	
Alignment (Text)	With this option, you define the text alignment. "Decimal" signifies that number values will be aligned at the decimal point.	0	Left	
		1	Centered	
		2	Right	
		3	Decimal	
		Formula	Formula dialog	
	Decimal-position	The position of the decimal point with the field, measured from the left corner of the preceding frame.	Number	
			Formula	Formula dialog
Width	Width of the selected column. If the sum of the column widths exceeds the width of the table, you will receive an error notice. The width of a field or column can also be changed in the workspace using the mouse by selecting the table object and moving the right border. The property list is recommended for precise resizing.	Number		
		Formula	Formula dialog	
Bar color (only with barcodes)	With this option, you define the color of barcodes. See Chapter			
Bar Width (only with barcodes)	The narrowest bar width in SCM units (1/1000 mm). 0=automatic adjustment. Not supported	Formula	Formula dialog	

	by all barcode types.			
	Orientation (only with barcodes)	Orientation of the barcode within the object frame.	0 1 2 Formula	left centered right Formula dialog
Bar Width Ratio (only with barcodes)	The ratio between the bars or spaces. Not supported by all barcode types.		Formula	Formula dialog
Show Text (only with barcodes)	Define whether the contents of the barcode should also be displayed as clear text.		True False Formula	Yes No Formula dialog
Rotation	Rotates the object counter-clockwise. E.g. turn column titles by 90°		0 1 2 3 Formula	0° 90° 180° 270° Formula dialog
Fit	Determines the behavior when the content is too long for the line.		0 1 2 3 Formula	Truncate Wrap Shrink Compress Formula dialog
Format	<p>The format editor is available in text object paragraphs and in table columns and is an alternative to formatting with the functions Date\$() and FStr\$() in the formula dialog. Using the format editor, you can set the format for numbers, currency, dates, times, percentages and angles. By default, the computer's system settings are used.</p> <p>Note that the format settings affect the entire expression. If you only wish to format certain sections of the expression (e.g. some text and numbers within the expression) use the functions Date\$() and FStr\$() in the formula dialog.</p>		True False	Dialog
Background	<p>The background color for the column can be defined.</p> <p>See Chapter Common Object Properties.</p>			
Height (not for Text, RTF Text)	Height of the selected column in mm. The actual height of a table line is the height of the tallest column.		Number Formula	 Formula dialog

Options (for Chart, HTML, OLE)	Opens the contents dialog for the appropriate object type.		Opens dialog
Frame	This sets the frame properties and the spacing between the frame and the individual cells of a table. Along with the font size, the cell edges "top" and "bottom" affect the height of the table row in text objects. Further information regarding the frame dialog can be found in Frame.		Opens dialog
Appearance Condition, Font	See Chapter Common Object Properties.		



Defining Footer Lines

It is often desirable to print footers along with your table. These are considered to be normal table lines with the exception that footers always appear at the end of the table on each page. If you want the footers to be printed on the last page only, assign the appearance condition `LastPage()`. Additional information about this function can be found in Chapter List of Available Functions.

Defining Group Lines

*Defining Group Lines*

The group lines are another special line type. Their purpose is to combine the data lines to be printed into groups. An example would be an alphabetical directory in which letters are used as intermediate headers. The data lines would be grouped and printed according to the first letter of the name.



Conditions are also important here. Any string, for example "Left\$(NAME,1)", can be used as a condition. Every time that the result of the expression changes from line to line, the result will be used as an intermediate header.

The assigned column definition for the group line could be: "Letter: «Left\$(NAME,1)»" or "Letter: "+Left\$(NAME), depending on which modus you are in. The syntax assistant will automatically display the proper syntax. For every new beginning letter in the NAME, the text "Letter: " followed by the letter will be printed.

More than one line layout is also possible. Hierarchically indented intermediate headers can be created. You can define a line layout, like in the above example, which will generate an intermediate header using the first letter of the variable NAME. Additionally, you can define a second line layout which generates an intermediate header using the first two characters of the variable NAME. The expression for this would be "Left\$(NAME,2)", a suitable column definition would be "Letters: «Left\$(NAME,2)»". For this second layout, special margins can be set using the button "Layout", for example "left" = 10.0 mm. The result could look like:

.....

Letter: A

Letters: AA

...

data line

...

Letters: AB

...

data line

...

...

Letter: B

Letters: BA

...

data line

...

Letters: BB

...

data line


...

See also:

- ▶ Appearance Condition
- ▶ Options for Group Header Lines




Appearance Condition

 It is also possible to use appearance conditions for group header lines. Further information can be found in the section "Appearance Conditions for Table Lines" in this chapter.

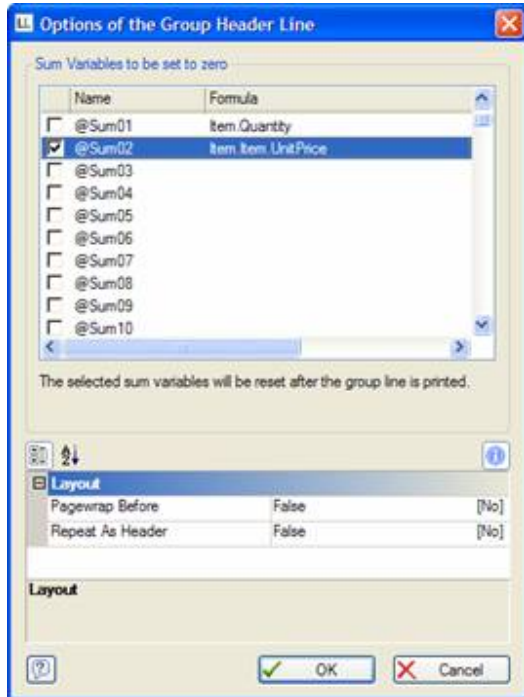


Options for Group Header Lines

By clicking on the button  you open the options dialog for group headers:

Select the Sum Variable(s) that should be returned by the group header line. This setting is useful to create group sums, for example to add the price of all items of a certain item group.

Hint: We recommend to use the function Sum() for the accumulation. Further information finds you under the description of function "Sum ()" in Chapter List of Available Functions.



Additional options of the group header are defined in a property list:

Property	Description	Value	Description
Repeat as Header	Prints the group header again after a page break.	True	Yes
		False	No
		Formula	Formula dialog
Pagewrap Before	Before a group header is printed, a page break is triggered. This means every group begins on a new page. When several group lines are printed with this option on at the same time, they will appear underneath each other on the new page. In the formula dialog you can set specific circumstances that trigger a page break before group headers, e.g. "Page break before there is only 5% space left".	True	Yes
		False	No
		Formula	Formula dialog

Further information can be found in the appendix under the description of the function "RemainingTableSpace".



Define Group Footers

A further special line type is the group footer. In principle, it works in exactly the same way as the group header, but appears only after the conditions have changed.

Property	Description	Value	Description
Pagewrap After	After a group footer is printed, a page break is triggered. This means the next group begins on a new page. When several group lines are printed with this option on at the same time, they will appear underneath each other on the "old" page. In the formula dialog you can set specific circumstances that trigger a page break after group footers, e.g. "Page break when there is only 5% space left".	True	Yes
		False	No
		Formula	Formula dialog
Further information can be found in the appendix under the description of the function "RemainingTableSpace".			

Inserting Formatted Text



Inserting Formatted Text



With the formatted text object you can, in contrast to normal text objects, change the format within a line. In addition you can also use variables in these objects. To create a formatted text object, select **Objects > Insert > Formatted Text** (CTRL+F).


When should you use the formatted text object and when the text object? Normal text objects should be given preference for every day jobs, since they contain less information and they are, therefore, printed faster. Consequently you should use a formatted text object in case you either can not realize a special format type with the normal text object or succeed only with great effort.

See also:

- ▶ Properties
- ▶ Text Contents



Properties


Property	Description	Value	Description
(Contents)	Opens the Contents		Opens dialog
Rotation	Rotates the object counter clockwise. This function is only available on Windows NT based systems (Windows NT, Windows 2000, and Windows XP).	0	0°
		1	90°
		2	180°
		3	270°
		Formula	Formula dialog
Page break	Defines if the object can cause a page break, or (in the case of an RTF object) enable another object to print the text exceeding the object's size. With labels, the next label will be started only when all objects with this option have been printed on the previous label. This option may not be available if page break ping is not supported by your application. The option is activated by default. If you wish to print an object on every page of a list project, this option must be deactivated or the object will otherwise only be printed once per project.	True	Yes
		False	No
		Formula	Formula dialog

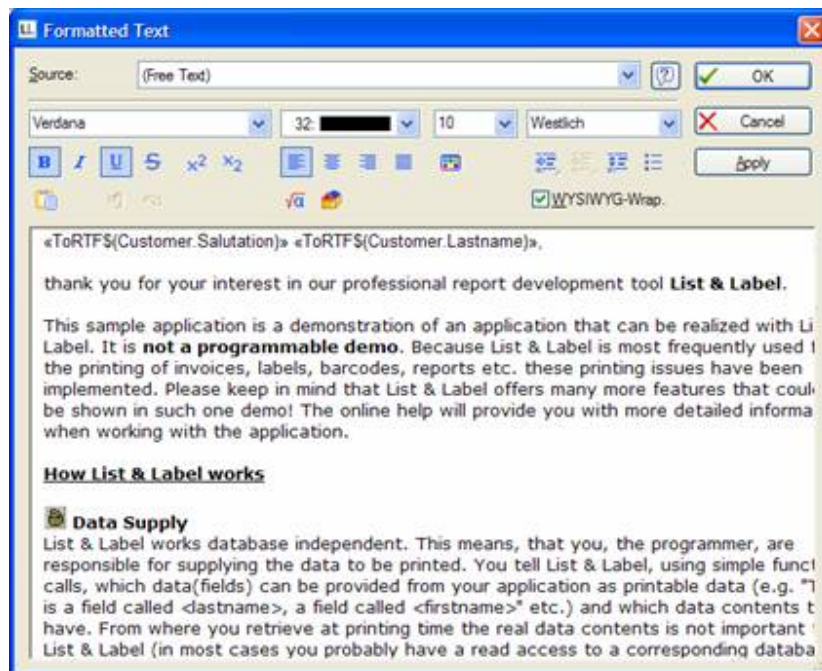
Text Contents


*Text Contents*

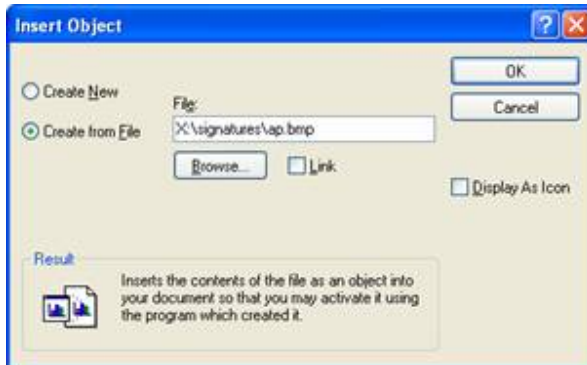
The contents of formatted text objects can be edited in the Formatted Text Editor.

As a source, you may either select an RTF-Variable or "(Free Text)". If you select the latter, an input box and formatting aids are displayed in the dialog, which are explained below. Simply select the text to be formatted and select the respective format tool:

- Select the font, size, color and character set with the combo-boxes.
- Select Left justified, centered, right justified, block and text background color, Indent paragraph (2.5 mm, right Mouse click: indent following lines), Unindent paragraph (2.5 mm, right Mouse click: unindent following lines), Set line and paragraph spacing, Enumeration, Insert from clipboard, Undo action, Repeat action
-  By clicking the button "Formula" you have access to the Formula Wizard. An important function of the Formula Wizard is ToRTF, which you can use to convert variables into RTF-text.



-  The RTF-Object also supports so called "Embedded Objects", objects that are embedded into the text, for example graphics. These objects can be inserted using the clipboard from, for example, MS Paint.



- **WYSIWYG** What you see is what you get: Word wrapping according to object size. This is only an approximate display and minimal differences may occur.
- Tab: CTRL+TAB
- A context menu is available in the editor, by which you can open various formatting possibilities for characters and paragraphs.

**See also:**

- Exceeding Text Transfer



Exceeding Text Transfer

If the current RTF-object is linked to another RTF-object in which the option page break is activated, the option "exceeding text of ..." is available as data source. If this option is set, input is blocked within the RTF-object since the (rest) text is automatically integrated from the other RTF-object.



Inserting Chart Objects



Inserting Chart Objects



By selecting **Objects > Insert > Chart** or clicking the respective icon you can insert a chart object. This object is used for analyzing and displaying different types of data. You can visualize the range of sales for example, the percentage of different sources or of course "simple" bar charts. A large number of different chart types are available and can be used for diverse applications. Most chart types have different sub types.


In general, three and two axis charts are differed. Three axis charts have three data axes and can be used to visualize the sales range per month and employee, for example. A two axis chart has only two data axes and shows e.g. the sales range of the whole company over a number of months.

See also:

- ▶ [Properties](#)
- ▶ [Selecting the Chart Type](#)
- ▶ [Selecting the Sub Type](#)
- ▶ [Chart Properties](#)
- ▶ [Examples](#)



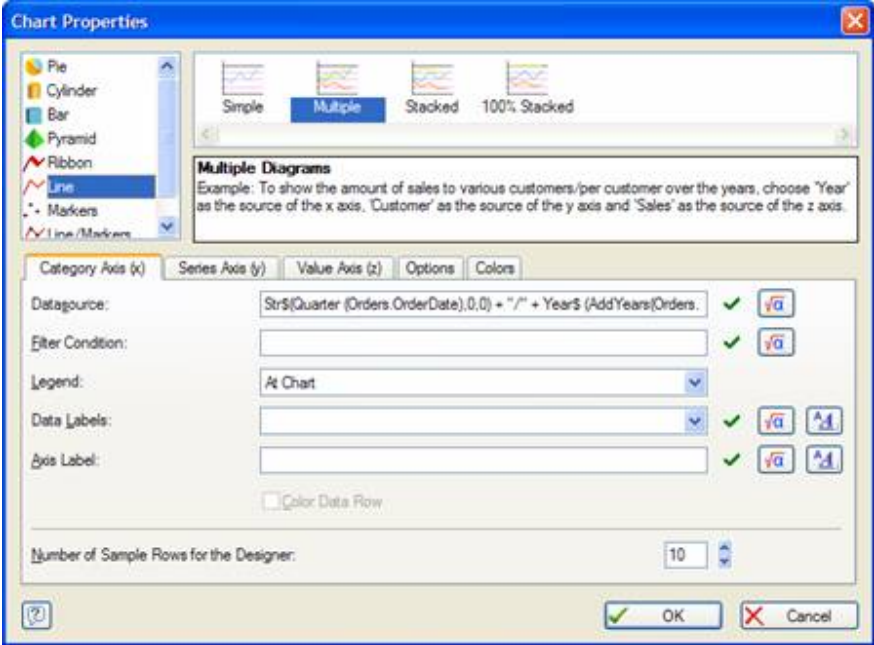
Properties

Property	Description	Value	Description
(Content)	Opens the contents dialog		Opens dialog

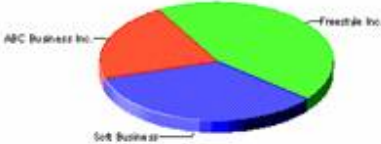


Selecting the Chart Type

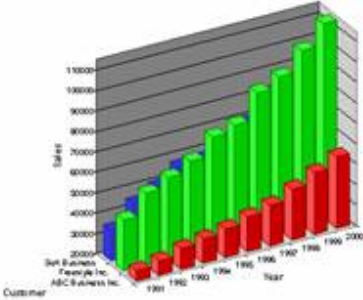
Double click a chart object to reach to the property dialog.



Select the chart type from the list on the left hand side. The following types are available:

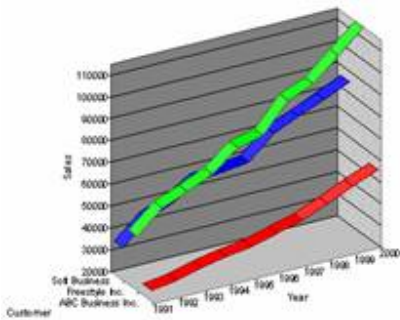


Pie Chart: a typical pie chart.

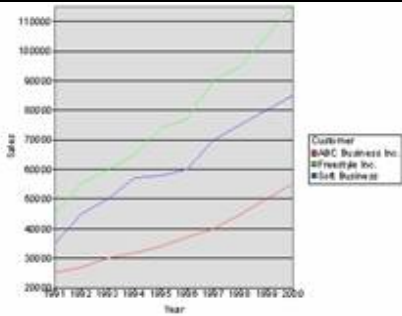


Cylinder/Bar/Pyramid: various types of bar charts that differ mainly in the form of the bars.





Ribbon: a three dimensional ribbon chart.



Line/Symbols/Line & Symbols: two dimensional charts.

Selecting the Sub Type



Selecting the Sub Type

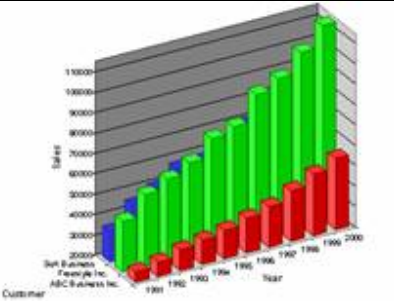
Depending on the chart type selected, up to eight different sub types may be available.

See also:

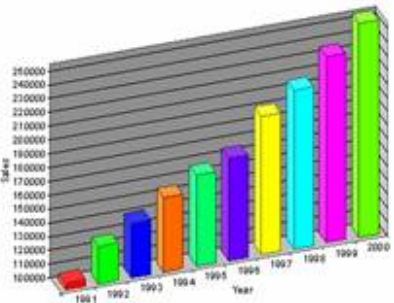
- ▶ Sub types for cylinder, bar and pyramid charts:
- ▶ Sub types for line and symbol charts



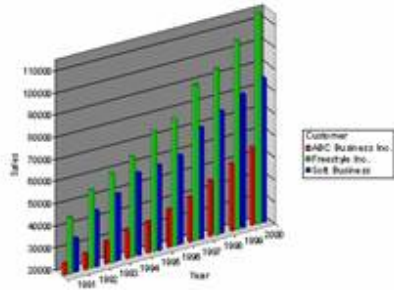
Sub types for cylinder, bar and pyramid charts:



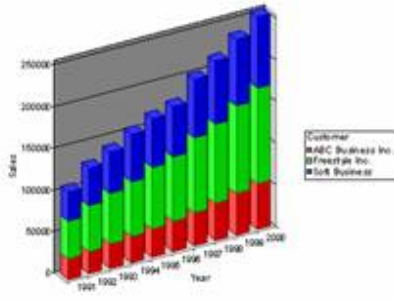
Multi row: A "normal" 3D chart, showing the sales per month and per employee, for example



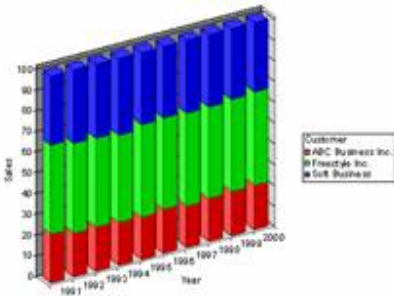
Simple 3D/Simple: Only two axes are available, showing the total amount of sales per month for example. The simple type is without the 3D effect.



Clustered 3D/Clustered: Values on the x axis are grouped allowing a direct comparison of values. The clustered type is without the 3D effect.



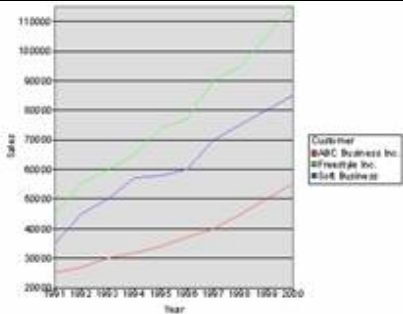
Stacked 3D/Stacked: This chart type is designed to show the share of each contribution, e.g. the share of sales each employee contributes to the total. This type is not available for pyramid charts. The stacked type is without the 3D effect.



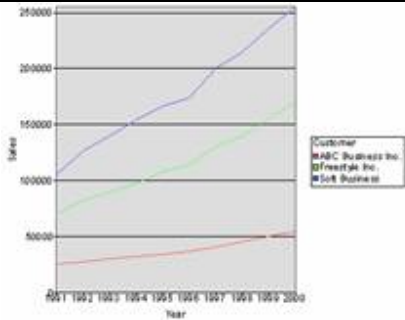
100% Stacked 3D/100% Stacked: Similar to the stacked chart, single contributions can be visualized with this chart. This chart type, however, shows percentile values. The value of a month's sales always equals 100% and the percentage of contribution for each employee can be extracted from the diagram. This type is not available for pyramid charts. The stacked type is without the 3D effect.



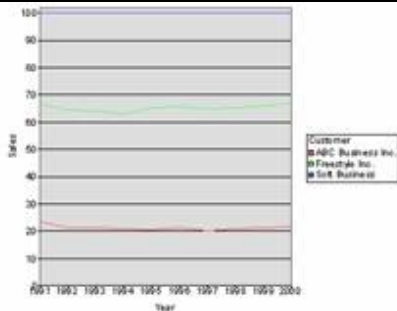
Sub types for line and symbol charts



Simple/Multiple: The values are entered as dots in a coordinate system. Depending on the type, the dots are connected by lines. A multiple diagram contains more than one line.



Stacked: This chart type is designed to show the share of each contribution, e.g. the share of sales each employee contributes to the total.



100% Stacked: Similar to the stacked chart, single contributions can be visualized with this chart. This chart type, however, shows percentile values. The value of a month's sales is always 100% and the percentage of contribution for each employee can be extracted from the diagram.

Chart Properties



Chart Properties

The chart object provides a variety of options. Depending on the chart type, there are two or three data axes. Using the cards you can switch from one axis to another. You have the following options:

See also:

- ▶ [Pie charts](#)
- ▶ [Options for the data source \(Pie charts\)](#)
- ▶ [Options for the chart object](#)
- ▶ [Colors for the chart object](#)



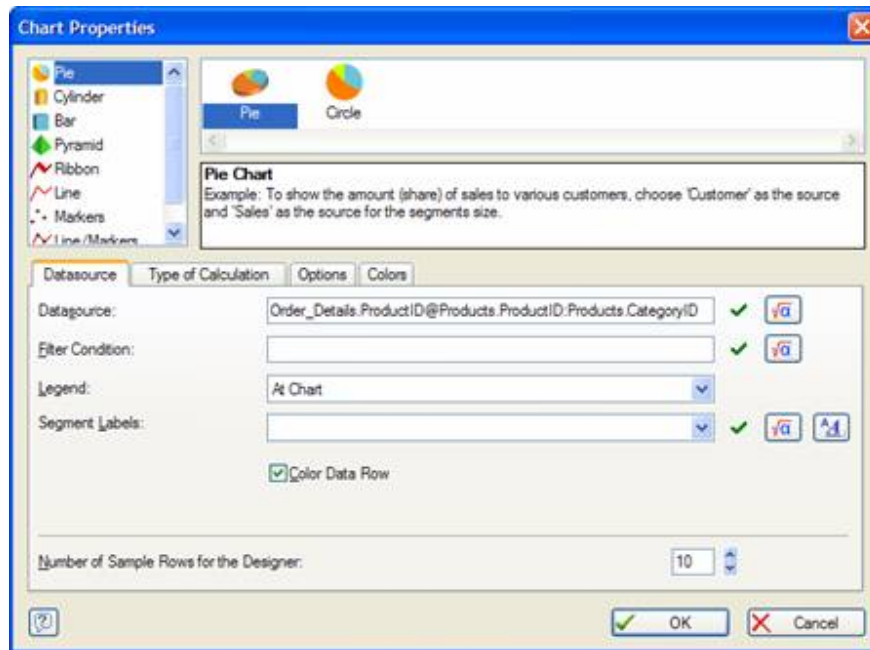
Pie charts



Pie charts have a special position; there are no actual "axes" but segments. Thus, the configuration differs from that of the other chart types.

Options for the data source (Pie charts)



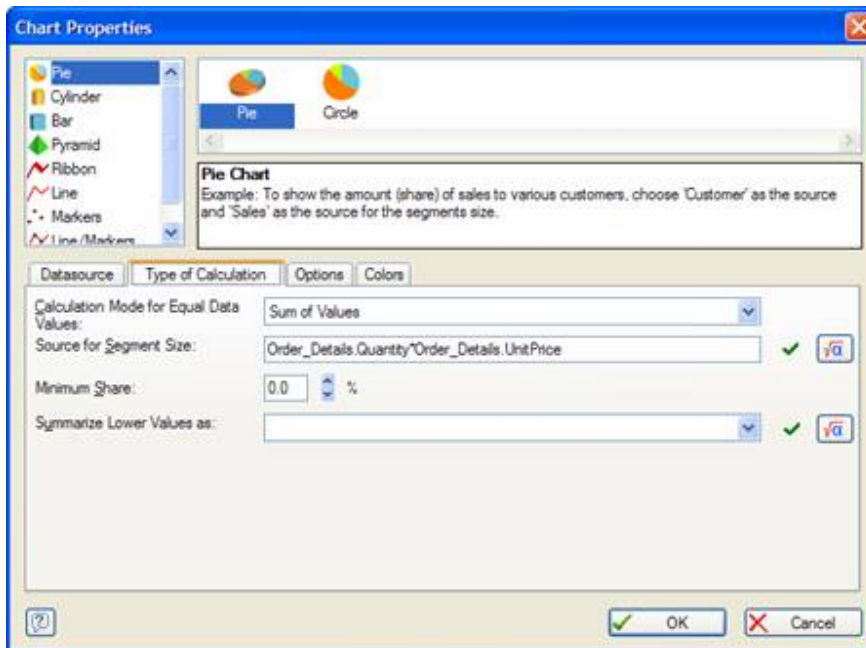
Options for the data source (Pie charts)



Data source	Select the data source for the segments, e.g. "Name" for people, "Month" for date values, and so on.
Filter condition	If you like you can define a filter condition. Only the records matching the condition will be used for the chart data (e.g. Left\$(Name,1) = 'A').
Legend	Select the position of the legend. If you select "at chart" the values are given directly at the segments.
Segment labels	Select the text which should be used to label the legend. Some preconfigured values are available, e.g. "Value and Percentage without decimals". Alternatively you may enter your own formula, select "Formula..." from the list in order to do so. By clicking on the button  you may also enter a formula. The  allows you to set the font for the labels. A left click opens a font dialog; a right click resets the font to the default object font.
Color data row	The segments are colored with different colors in order to make the diagram easier to read.
Number of sample rows for the Designer	The Designer has no access to the "real" data which will appear in your chart when printing. In order to have a picture of how your chart is going to look like, you can set the number of segments to appear in the Designer here.



Options for the type of calculation (Pie charts)

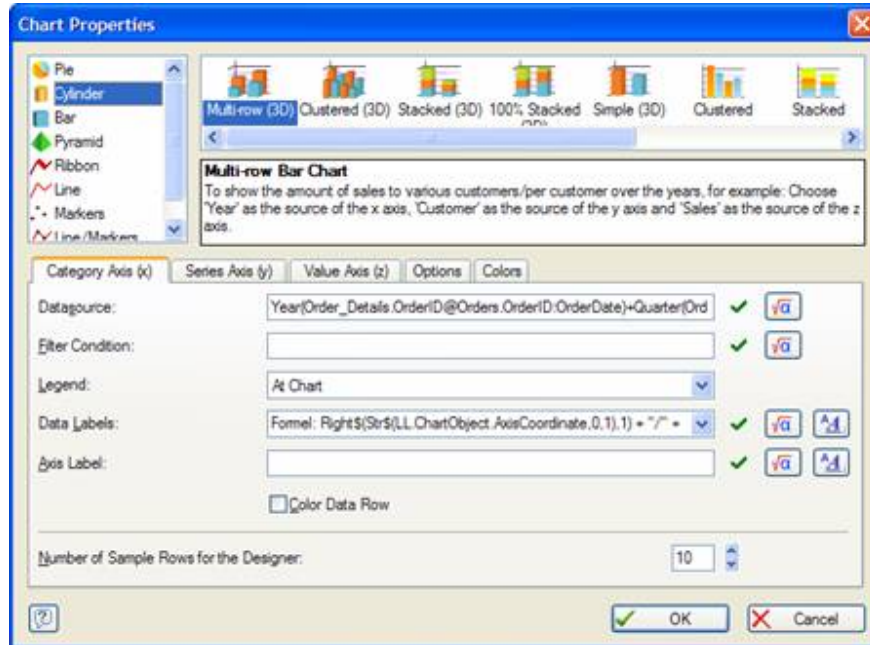


Calculation mode for equal values	Specifies the handling of equal source values. An example: you want to have the sum of sales to your customers. In this case, select "sum of values". If you're interested in the average price of sales to a customer, select "mean value". If only the number of sales to a customer is of interest, select "number of values". As the actual value is not of interest in this case, the source field will be deactivated.
Source for segment size	Select the data source for the segment size, e.g. "Value", "Price" etc.
Minimum share	Especially when you have numerous values that make up small contributions it may be desirable to summarize these in a common segment. Select the maximum value up to which the segments will be summarized.
Summarize lower values as	Defines the label for the summarized segment. If you do not enter your own formula, the label will be adapted to the "normal" segment label layout on the data source card.



Options for category and series axis (except pie charts)

If you chose to have a three axis chart, both axes are available (as x and y-axis). Only the category axis is needed (as x axis) for two axis charts. You have the same options for both axes:

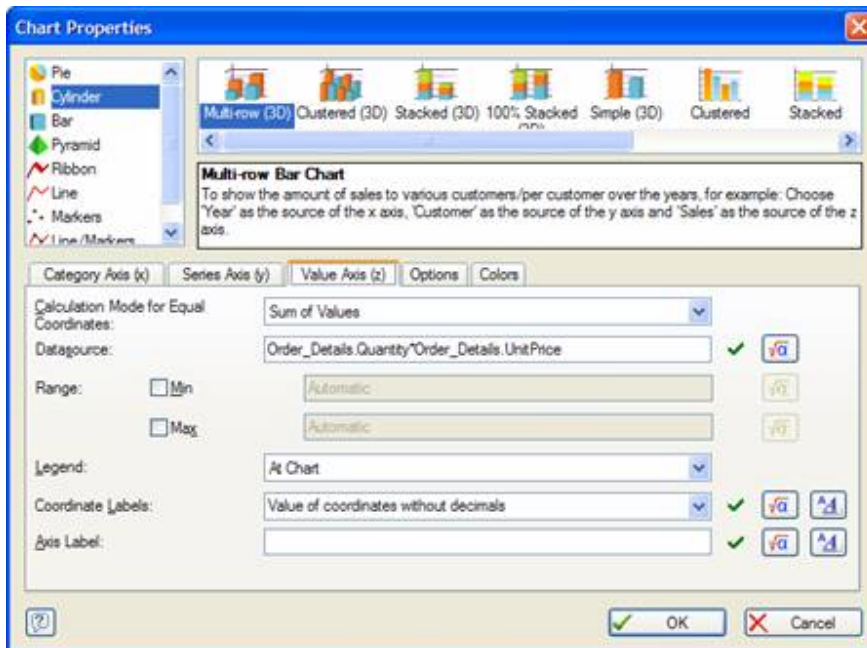


Data source	Select the data source for the row, e.g. "Name" for people, "Month" for date values, and so on.
Filter condition	If you like you can define a filter condition. Only the records matching the condition will be used for the chart data (e.g. Left\$(Name,1) = 'A').
Legend	Select the position of the legend. If you Select "at chart" the values are given directly at the axis. Otherwise, a legend will be added on the left, right, bottom or top of the chart.
Data labels	Select the text which should be used to label the legend. Some preconfigured values are available, e.g. "Value of source". This setting will display the source value on the axis, i.e. the name of a customer, the month,...
Axis label	Select a text for your axis label here. By clicking on the button "formula" you may also enter a formula. The button "font" allows you to set the font for the labels. A left click opens a file selection dialog; a right click resets the font to the default object font.
Color data row	This attribute may only be selected for either the series or the category axis. The selected data row will then be colored in altering colors.
Number of sample rows for the	The designer has no access to the "real" data which will appear in your chart when printing. In order to have a picture of how your chart is going to look like, you can set the number of values to appear in the designer here.

designer



Options for the value axis (except pie charts)

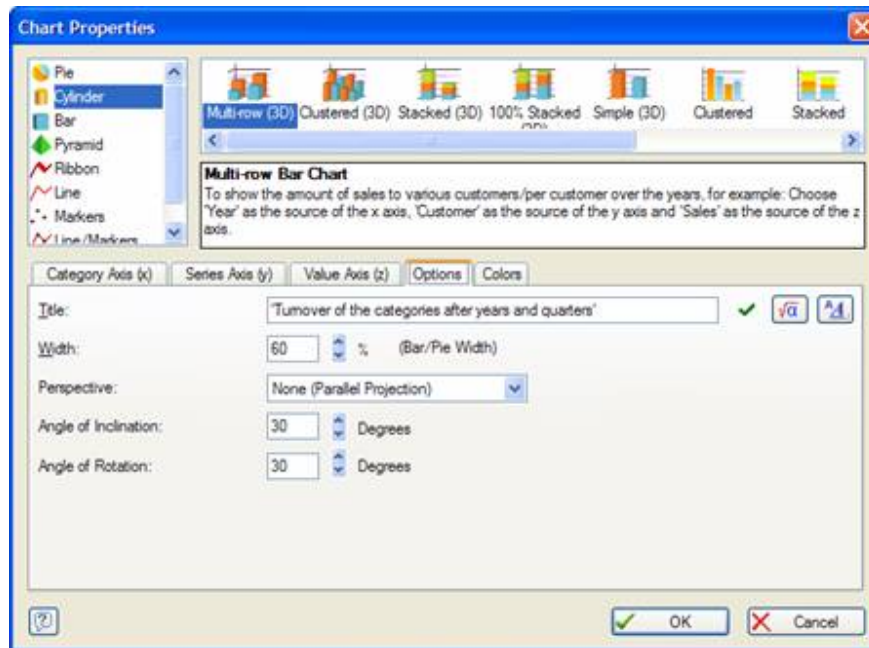


Calculation mode for equal coordinates	Specifies the handling of equal source coordinates. An example: you want to sum the sales to customer Smith in January. In this case, select "sum of values". If you're interested in the average price of your sales to this customer, select "mean value". If only the number of sales to the customer is of interest, select "number of values". As the actual value is not of interest in this case, the source field will be deactivated.
Data source	Select the data source for the value axis, e.g. "Value", "Price" etc.
Range	You can limit the shown data range in order to e.g. regard huge divergences within the values. If your values have high peaks, you can cut them off by setting a max limit. If you leave the default setting "automatic" the chart will display all values.
Legend, Coordinate labels, Axis label	These options are the same as for the series and category axis. The legend can only be displayed at the chart or not at all, however.



Options for the chart object

On the options card you may set different layout options for the chart object.

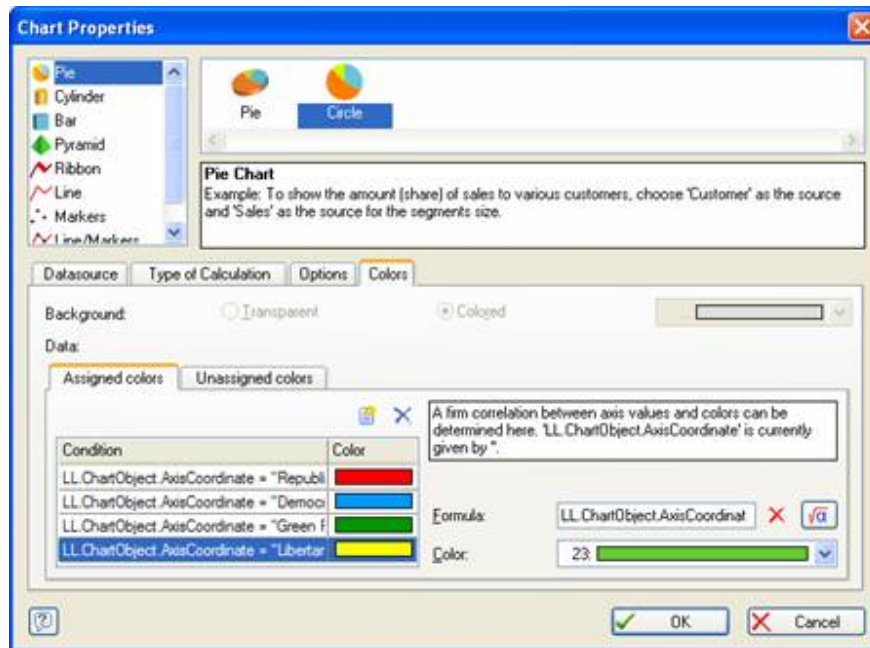


Title	Select a title for your diagram. This title will be displayed above your chart. By clicking on the formula-button you may also enter a formula. The font-button allows you to set the font for the labels. A left click opens a font dialog; a right click resets the font to the default object font.
Width	Sets - depending on the chart type - the bar width, the line width or the width of the segments.
Perspective	Select the level of perspective for your object here.
Angle of inclination, Angle of rotation	Sets the rotation of the diagram. You may also set these angles using the rotation buttons which appear when the chart is selected on the workspace.



Colors for the chart object

On the colors card you can set the colors for your chart.



Background	Select the color for the "back wall" of the chart. Alternatively the wall may also be transparent. To select a color, select it from the upper combo box. The "..." entry brings up a standard color selection dialog.
Color map	Select the colors and the order of colors for the chart. For a bar chart, this is the color of the bars, for a pie chart the segment color. To select a color, select it from the upper combo box. The "..." entry brings up a standard color selection dialog.

Examples



Examples

Chart options depend on the available data. Thus, the following examples are kept general. An application may give you the fields "Name", "Month" and "Sales", denoting the name of your customer, the month in which a transaction took place and the total transaction volume.

See also:

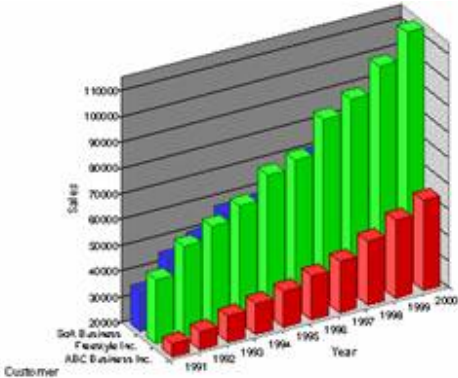
- ▶ Multi row bar chart
- ▶ Pie chart
- ▶ 100% stacked bar chart

Multi row bar chart



Multi row bar chart

This would be the simplest way to analyze your data; you'd have a diagram showing the total transaction volume for each month and customer:





...this is how it's done:

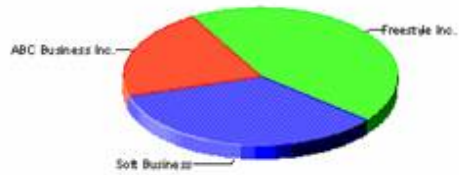
Insert a new chart object; select "Bar" as type and "Multi row" as sub type. Select "Month" as the data source for the category axis and "Customer" as the data source for the series axis. For the value axis, select "Sales". Edit the axis labels and title as required - you're finished.

Pie chart



Pie chart

If you're interested in the share each customer contributes to the total sales over a number of months, you'd select a pie chart. This chart directly displays the shares:





...this is how it's done:

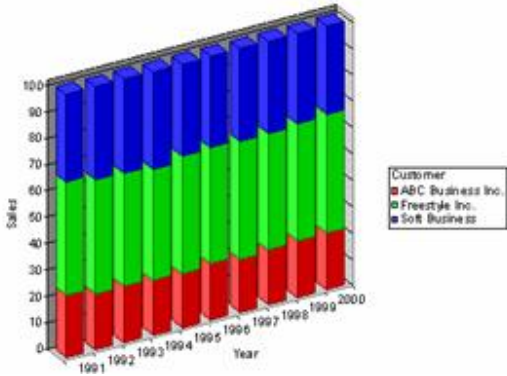
Insert a new chart object, select "Pie" as type and sub type. Select "Customer" as the data source and "Sales" as the data source for the segment size. Edit the axis labels and title as required - you're finished.

100% stacked bar chart



100% stacked bar chart

The pie chart in the last example shows the share over a number of months. However, to quickly take a look at the shares for each month and extract trend lines, it would be interesting to see the change in the shares over a number of months. The 100% stacked bar chart is perfect for this.





...this is how it's done:

Insert a new chart object; select "Bar" as type and "100% stacked" as sub type. Select "Month" as the data source for the category axis and "Customer" as the data source for the series axis. For the value axis, select "Sales". Edit the axis labels and title as required - the procedure is exactly the same as for the multi-row bar chart. This is why you can simply switch between the two sub types without having to reconfigure your data sources.

Inserting a Crosstab



Inserting a Crosstab



You have two ways to insert a Crosstab:

- In multi-tables you can insert a crosstab object through the report structure tool window (see chapter Report Structure).
- Through **Objects > Insert > Crosstab (Pivot Table)**.

This object is used to analyze and display different kinds of data in several dimensions. You can use it, for example, to investigate the changes in turnover per year and region and analyze sales by unit and customer, then show the totals by quarter and year. There are numerous layout options available to you.

Example 1: Customer sales per sales period and employee

	2004		2005		2006		Total		
	Q - 3	Q - 4	Q - 1	Q - 2	Q - 3	Q - 4		Q - 1	Q - 2
ALFKI	---	---	---	---	1086	1208	851	491	3636
ANATR	---	89	---	---	480	320	---	514	1403
ANTON	---	403	---	3038	2082	957	---	---	6480
AROUT	---	480	1352	---	2143	1704	---	---	5679
BERGS	2102	---	3429	---	---	---	---	---	5531
Total	2102	972	4781	3038	5791	4189	851	1006	22729

	Callahan	Davolio	Fuller	King	Leverling	Peacock	Suyama	Total
	ALFKI	---	1342	---	---	---	1208	
ANATR	---	---	---	89	800	514	---	1403
ANTON	---	957	---	2963	403	2157	---	6480
AROUT	899	2596	---	---	---	1704	480	5679
BERGS	1489	---	613	---	3429	---	---	5531
Total	2388	4895	613	3052	4632	5583	1566	22729

Example 2: Turnover per sales period and country

	2004		2005				2006
	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1
Canada	0,00 €	0,00 €	6.366,30 €	896,00 €	0,00 €	3.118,00 €	0,00 €
France	1.176,00 €	13.012,70 €	4.049,00 €	5.666,80 €	3.662,80 €	4.857,75 €	0,00 €
Germany	0,00 €	0,00 €	0,00 €	285,80 €	1.880,00 €	1.208,00 €	1.476,00 €
Mexico	0,00 €	492,00 €	0,00 €	3.037,75 €	2.561,75 €	1.652,40 €	660,00 €
Spain	0,00 €	982,00 €	0,00 €	0,00 €	0,00 €	0,00 €	4.035,80 €
Sweden	2.102,00 €	0,00 €	3.429,00 €	3.192,65 €	3.069,25 €	4.879,20 €	0,00 €
UK	0,00 €	480,00 €	1.352,00 €	0,00 €	2.142,90 €	2.325,00 €	1.950,10 €
Total	3.278,00 €	14.966,70 €	15.196,30 €	13.079,00 €	13.316,70 €	18.040,35 €	8.121,90 €

See also:


- ▶ Properties
- ▶ Axis definition (Grouping)
- ▶ Cell definition (Contents)

- ▶ Layout Options and Page Break Behavior
- ▶ Crosstab Creation Wizard
- ▶ Crosstab Functions



Properties

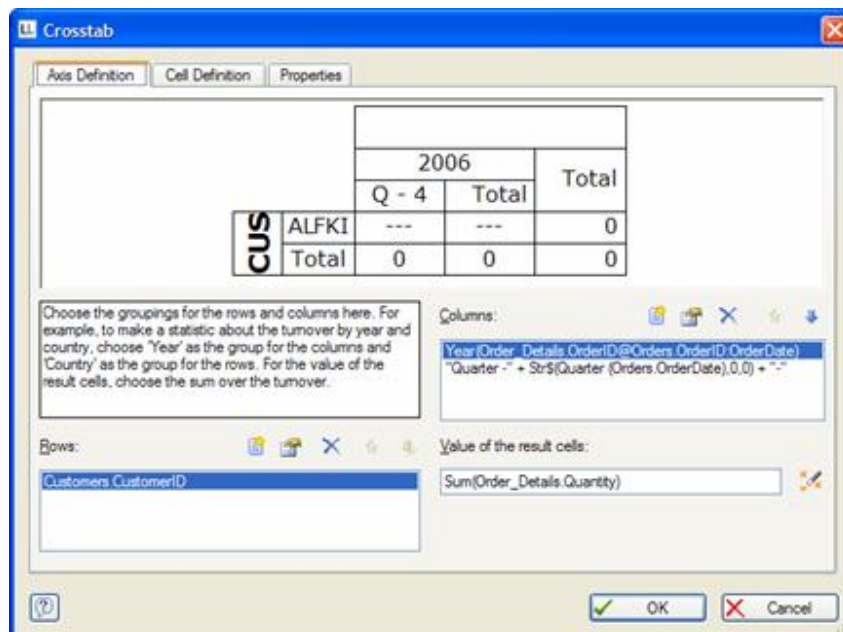
Please note: As long as the tool window "Report Structure" is available, other properties are applicable (see P.140).

Property	Description	Value	Description
(Contents)	Opens the "Contents"-dialog		Opens dialog
Background	Background of the object. See chapter Common Object Properties.		
Frame	Frame properties and clearances of the object frame. See chapter Common Object Properties.		
Frame defaults, minimum size, columns, rows, link, PDF index text	Frame default settings for sub-objects. See chapter Layout Options and Page Break Behavior.		
Display properties, position, page break before	See chapter Common Object Properties.		

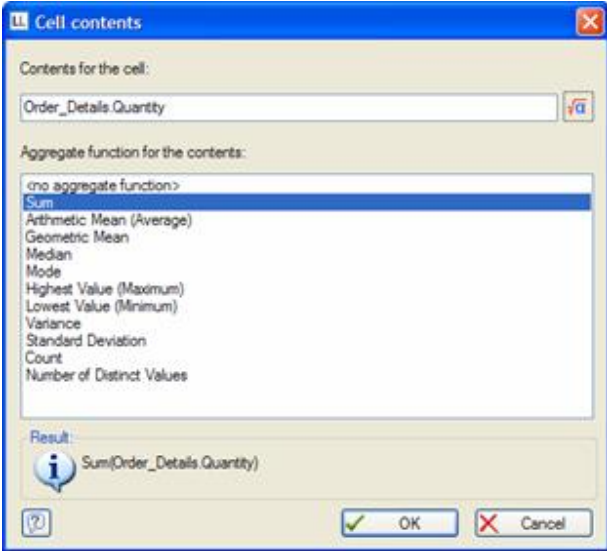


Axis definition (Grouping)

In the "Axis Definition" tab, you can set the groupings for the rows and columns. For example, to create a statistics about the turnover by year and country, select "Country" as the group for the rows and "Year" as the group for the columns. For the contents of the result cells, select the sum over the turnover.



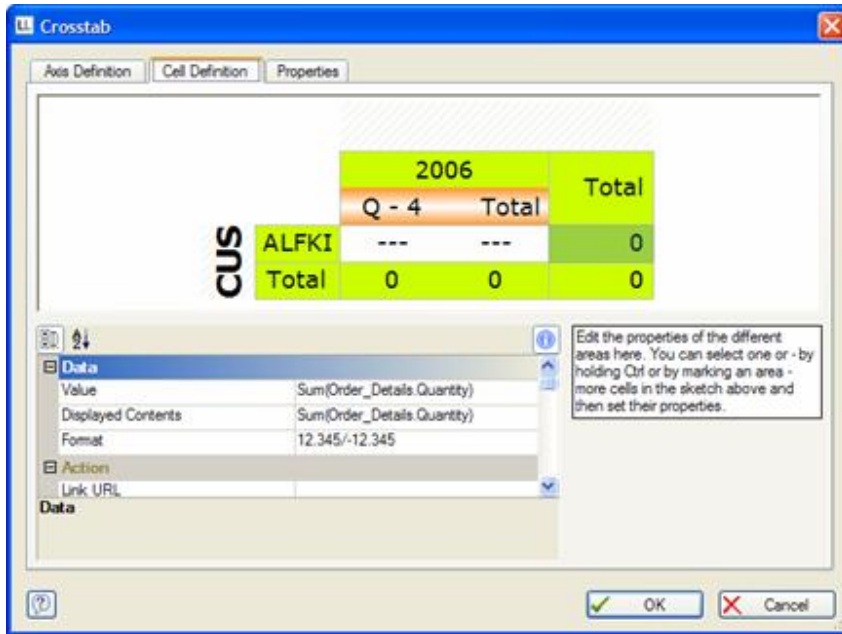
- With the "New" button, you can add a group for rows or columns.
- With the "Properties" button you can edit the selected group.
- With the button "Delete" you can delete the selected group.
- You can add as many groups (layers) as you need, e.g. a group "Year" and another group "Quarter". With the arrow buttons, the order can be changed. The lowest row or column is the innermost group.
- In the field "Value of the result cells" the cell contents are defined. Here you can select with the button "Edit group result formula" in the dialog "Cell contents" an aggregate function for the content, e.g. sum or quantity. This is the formula that is set into the "value" property of each content cell. In the lower part of the dialog "Cell contents", the selected result function is displayed.





Cell definition (Contents)

In the "Cell Definition" tab, the properties of the different cells can be edited.



You can select the cells directly in the sketch in the top part of the dialog and can then edit their properties. To select more than one cell, hold the CTRL key and selector drag a frame around the cells with the cursor.

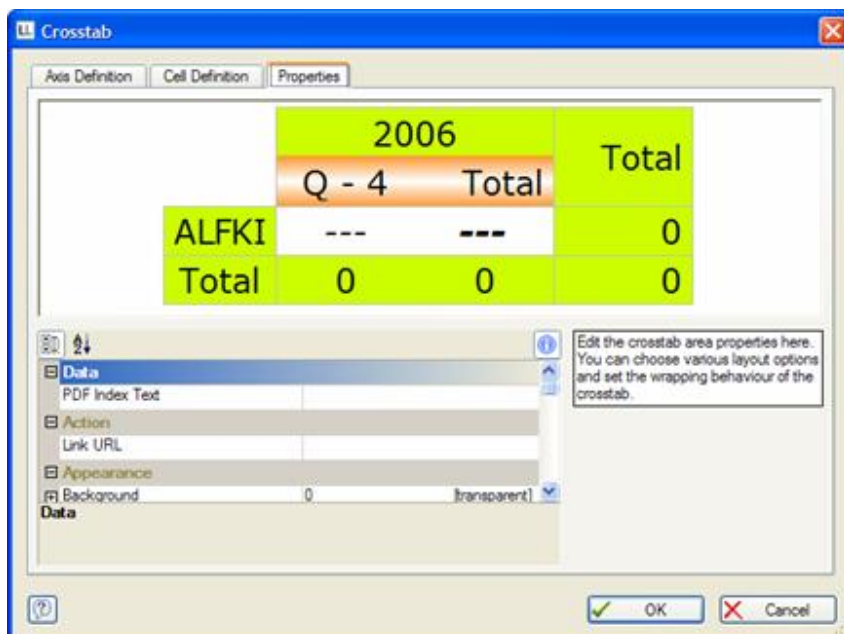
Property	Description	Value	Description
Value	Formula for the cell value. This is evaluated by the Crosstab.Cells... functions.	Formula	Formula dialog
Displayed contents	Text to be displayed in the cell, so it can be different from the property "Value".	Formula	Formula dialog
Link	Link that is opened when clicked (only in preview, PDF and HTML export).	Link	Link Formula dialog
Rotation	Rotates the object anti-clockwise. With this function you can, for example, turn column titles by 90°.	0 1 2 3 Formula	0° 90° 180° 270° Formula dialog
Background, font, format, frame	See chapter Common Object Properties.		

Vertical alignment	Vertical alignment of the contents in the available space.		0 1 2 Formula	top centre bottom Formula dialog
Alignment (with Text)	The text alignment. Decimal means numbers are aligned by their decimal points.		0 1 2 3 Formula	Left Centre Right Decimal Formula dialog
	Decimal position	Position of the decimal point (only applicable in decimal alignment, negative means from the right).	Number Formula	Formula dialog
Minimum width	Sets the minimum width of the cell.		Number Formula	Formula dialog
Minimum height	Sets the minimum height of the cell.		Number Formula	Formula dialog



Layout Options and Page Break Behavior

Edit the properties of the crosstab here, e.g. layout and page break behavior.



PDF index text	Text for the PDF index.	
Link	Link that is opened when clicked (only in preview, PDF and HTML export).	
Background, Default Frame	See chapter Common Object Properties.	
Minimum size	Sets by how much the crosstab can be shrunk in order to avoid a horizontal page break. 50=that it can be shrunk up to 50% to avoid a page break; 100=retain original size.	
Minimum height	Sets how much height should be available to an object. If less space is available, a page break is triggered.	
Columns	Repeat headings	Sets whether the column headers are repeated after a page break.
	Page break layer	Sets the ideal page break layer. 0=innermost group, i.e. the lowest row in the "Columns" field of the "Axis definition" tab.
	force	Forces page break after every corresponding group.
Rows	Repeat headings	Sets whether the row headings are repeated after a page break.

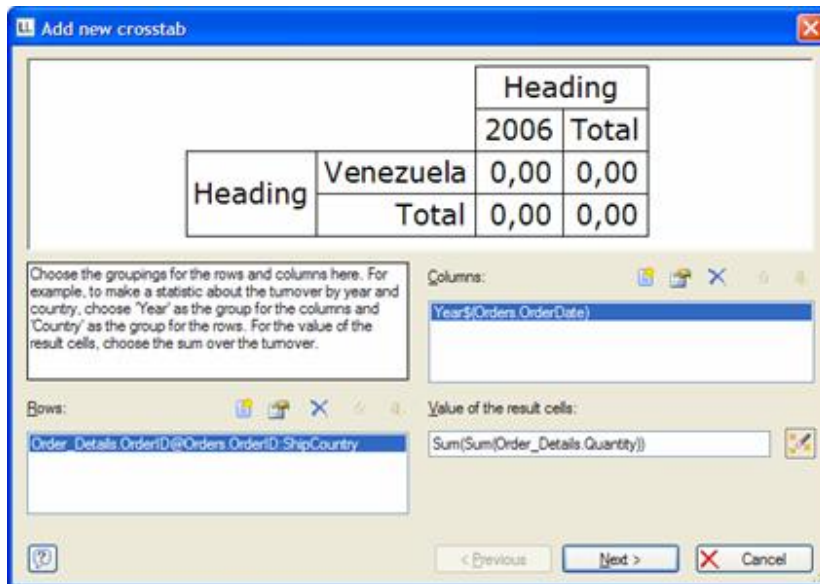
Page break layer	Sets the ideal page break layer. 0=innermost group, i.e. the lowest row in the "Rows" field of the "Axis definition" tab.
------------------	---

force	Forces page break after every corresponding group.
-------	--



Crosstab Creation Wizard

When you are creating a new crosstab, a wizard is available to you to guide you through the three tabs.



- In the first, you set the groups for the rows and columns here. For example, to make a statistic about the turnover per year and country, select "Year" as the group for the rows and "Country" as the group for the columns. For the contents of the result cells, select the sum over the turnover.
- With the "Next" button, you come to the "Cell Definition" dialog. The properties of the different cells are edited here. You can select the cells directly in the upper area of the dialog and can then edit their properties. To select several cells, hold the Ctrl key or drag a frame around the cells with the cursor.
- With the "Next" button, you come to the dialog for editing the properties of the crosstab, e.g. the layout and page break behavior.



Crosstab Functions

There are several crosstab functions to access to the values of each data record.

- `Crosstab.Cells.Avg()` returns the average of the cell contents. Only available in crosstab objects.
- `Crosstab.Cells.Max()` returns the largest value of the cell contents. Only available in crosstab objects.
- `Crosstab.Cells.Min()` returns the smallest value of the cell contents. Only available in crosstab objects.
- `Crosstab.Col$()` returns the column header for the cell currently being output. Only available in crosstab objects.
- `Crosstab.Col()` returns the column index for the cell currently being output. Only available in crosstab objects.
- `Crosstab.Row$()` returns the row header for the cell currently being output. Only available in crosstab objects.
- `Crosstab.Row()` returns the row index for the cell currently being output. Only available in crosstab objects.
- `Total()` can be used for computations over all cells away. Otherwise calculations always run over all values, which concern the respective cell

Additional information about this function can be found in Chapter [List of Available Functions](#).

Inserting Form Controls



Inserting Form Controls



To use your project for form output and input, different form controls are available with the form control object. To insert a form control object into your project, select **Objects > Insert > Form Control**.

Form controls can directly be filled by the user in the InLoox preview and HTML or generate actions as e.g. sending an email.

The following determines the basic behavior of the element:

Property	Description	Value	Description
Type	Determines element type.	0	Edit
		1	Checkbox
		2	combo box
		3	Button

Corresponding to the type the properties of the control are changing.

In the following Chapter the different properties of the form control are described according to the chosen type-property:

See also:

- ▶ Type Edit
- ▶ Type Checkbox
- ▶ Type Combobox
- ▶ Type Button



Type Edit

Property	Description	Value	Description
Force Input	Determines whether input has to be entered by the user.	True False Formula	Yes No Formula dialog
Field Name	Determines the field name of a possibly data export via XML/XFDF.	Name	
Validation Expression	Regular expression to validate input.		
Error Message	Message that is given if validation fails		
Value	Default value for input object.		
Tooltip	Tooltip which should appear		
Multiline	Determines whether the input field is multilined or not. When multiline is not chosen, more characters can be entered and the input field scrolls automatically. But when printed these characters are cut off.	True False Formula	Yes No Formula dialog



Type Checkbox

Property	Description	Value	Description
Force Input	Determines whether input has to be entered by the user.	True	Yes
		False	No
		Formula	Formula dialog
Field Name	Determines the field name of a possibly data export via XML/XFDF.	Name	
Value	Default value for input object.		
Tooltip	Tooltip which should appear		



Type Combobox

Property	Description	Value	Description
Force Input	Determines whether input has to be entered by the user.	True	Yes
		False	No
		Formula	Formula dialog
Items	Available default values of the combobox	List	List of default values
Field Name	Determines the field name of a possibly data export via XML/XFDF.	Name	
Validation Expression	Regular expression to validate input (only with variable text)		
Error Message	Message that is given if validation fails		
Editable	Determines if the user can enter different values than the default values.	True	Yes
		False	No
		Formula	Formula dialog
Value	Default value for input object.		
Tooltip	Tooltip which should appear		

Type Button

Property	Description	Value	Description
Action	Determines the possible performance. Only available with type Button. 0: Send as email. The most relevant fields for sending an email can be preset. 1: Save. By clicking the button, the preview file, respectively the entered data will be saved in the corresponding format. 2: Sending via HTTPPost 3: Defines a hyperlink area. The object is transparent and can therefore be displayed above other objects.	0	Send as email.
		1	Save.
		2	Sending via HTTPPost
		3	Link
Text	Button text	Formula	Formula dialog

Inserting HTML formatted text

Inserting HTML formatted text

To display HTML formatted text (e.g. web sites) within your projects, you can use the HTML text object. Please note that due to license restrictions GIF files can not be displayed.

The object supports the HTML 3.2 specification. Partially supported are some extended tags as well as cascading style sheets.

To insert a HTML text object use the toolbar or **Objects > Insert > HTML-Text**.

The contents of the object are edited in the property list, where you have various options.

See also:

Properties

HTML-Contents

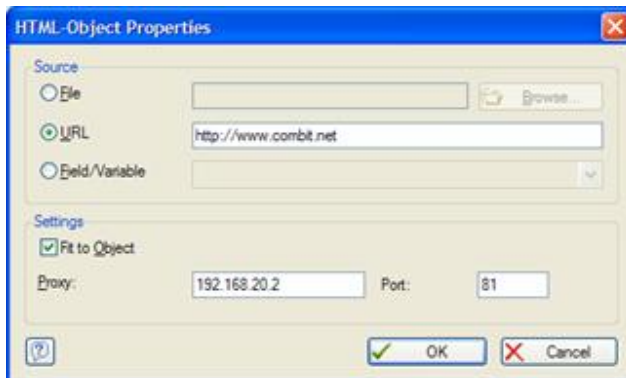
Properties

Property	Description	Value	Description
(Contents)	Opens the "Properties" dialog		Opens dialog



HTML-Contents

You can define the contents of the object in the HTML-Object Properties dialog.



- File - select this option to display the contents of a previously saved HTML file. The "Browse..." button opens a file selection dialog. The file must be located on a local storage medium or network.
- URL - this option is used to display websites (e.g. www.combit.net). The contents are downloaded at runtime, thus you'll need a connection to the Internet.
- Field/Variable - if your application makes HTML contents available, these can be selected here. Refer to your application's documentation for details.
- Fit to Object: Select this option to fit the contents into the object. If the option is deactivated, the contents are fit to the object width and output may wrap over several pages.
- Proxy: If your access is via a proxy server, you must enter its address in the settings group. By default, your current proxy configuration will be set. Leave this setting (without editing the configuration) in order to be able to distribute your projects to other systems with a different proxy configuration. The current configuration will always be taken in this mode.

Inserting OLE-Server Documents



Inserting OLE-Server Documents



The OLE Container is available for the insertion of OLE-Server documents into your project. This gives you the capability to embed and print documents that were created with other applications, for example Word, Excel, Visio or MapPoint, into your project without changes.

You can create an OLE-Object using **Objects > Insert > OLE Container**. After defining the size and position of the object on the workspace, the standard "Insert Object" dialog will open. You can select the object type and select either "Create New" or "Create from File".

You can select, for example, an existing Excel file and insert it into the object frame.

Note: Only the first Page of an embedded document can be displayed, as there is no standard for multi-page OLE-Objects.

See also:

▶ Properties

▶ Contents



Properties

Property	Description	Value	Description
(Contents)	Opens "Contents" dialog		Opens dialog or host application



Contents

If contents are available the host application will be opened, otherwise the standard "Insert Object" dialog will appear.

Inserting Form Templates



Inserting Form Templates

Form templates are drawings, e.g. scanned pictures, of actual forms that you can place in the background of your workspace to aid in the exact placement of objects. The templates are displayed on the workspace but will not be printed and cannot be edited.

To insert a form template in the background of your workspace, use **Objects > Insert > Form Templates**.


After creation, select the form template using the tool window Objects. The template can no longer be selected in the workspace.

See also:

▶ [Properties](#)



Properties

Property	Description	Value	Description
File name	Select the file that contains the required form template. The same formats are supported as in graphic files. (See Chapter Inserting Picture Objects).	File name 	Open file dialog
Fade color	The selected color will be added to the template to fade the color. See Chapter Colors		
Keep proportions	Using the option "Keep Proportions" you can define whether the graphic should be inserted in the correct relationship between height and width (True), or if the graphic should be resized to occupy the complete object (False).	True	Yes
		False	No
		Formula	Formula dialog

Tip: When using a template to create your own form or to fill out a form, size and position of the template are of critical importance. We recommend that the template be placed using the Property List, as this allows a more exact placement than the use of the mouse.

Appendix



Appendix

See also:

- ▶ [List of InLoox Variables](#)
- ▶ [List of Available Functions](#)
- ▶ [List of Available Barcodes](#)
- ▶ [List of ISO 3166 Country Codes](#)

List of List & Label Variables



List of InLoox Variables

InLoox automatically provides, dependent upon the application, several variables and fields (in list projects). These contain general information about the print project, printing etc. You can find the variables and fields in the LL subfolder in the variable list.

See also:

▶ List of Variables

▶ List of Fields



List of Variables

Name	Description
LL.SortStrategy	Selected sorting can be set, dependent upon the application in the Project Menu.
LL.FilterExpression	Selected project filter, can be set in Project -Menu.
LL.OutputDevice	Output device. Can be used to assign object specific formats for certain output formats ("HTML", "RTF", "PDF",..)
LL.CountData (not for List and Multitab projects)	Number of records transferred by the program so far during this printing process. This number also contains the records that were not printed due to filter conditions. This number will increase with every record.
LL.CountDataThisPage (not for List and Multitab projects)	Number of records transferred by the program so far during this printing process on the current page. This number also contains the records that were not printed due to filter conditions. This number will increase with every record.
LL.CountPrintedData (not for List and Multitab projects)	Number of the actually printed records.
LL.CountPrintedDataThisPage (not for List and Multitab projects)	Number of the actually printed records on the current page.
LL.Device.Page.Size.cx	Physical page width of the output device in project coordinates in SCM units (1/1000 mm). Can be used in formulas to fit objects to larger output formats. Example: Set the property Position.Left in the Property List to the value 0, the property Position.Right to LL.Device.Page.Size.cx. The object will occupy the total page width.
LL.Device.Page.Size.cy	Physical page height of the output device in SCM units (1/1000 mm).
LL.Device.Page.Name	Name of the output page type (example "A4").
LL.Device.PrintableArea.Size.cx	Printable page width of the output device in SCM units (1/1000 mm).
LL.Device.PrintableArea.Size.cy	Printable page height of the output device in SCM units (1/1000 mm).
LL.Device.PrintableArea.Offset.cx	Width of the left non-printable border in project coordinates in SCM units (1/1000 mm). Example: In the Property List, set the property Position.Left to the value LL.Device.PrintableArea.Offset.cx. The object will always lie exactly on the left edge of the printable area of the printer.
LL.Device.PrintableArea.Offset.cy	Height of the top of the non-printable border in project coordinates in SCM units (1/1000 mm).

LL.Device.Name

Name of the output device(printer).



List of Fields

Name	Description
LL.FcountData	Number of transmitted records. This number also includes the records that were not printed due to filter conditions.
LL.FcountDataThisPage	Number of transmitted records on the current page. This number also includes the records that were not printed due to filter conditions.
LL.FcountPrintedData	Actual number of printed records.
LL.FcountPrintedDataThisPage	Actual number of printed records on the current page.
Additionally, depending on project type	
LL.CurrentRelation	Name of the current relation
LL.CurrentSortOrder	Order of the current table
LL.CurrentTable	Name of the current table
LL.CurrentTablePath	Indicates the current table hierarchy, e.g. Customers.Orders.Order_Details

List of Available Functions

List of Available Functions

In the following table you will find all functions, listed alphabetically, available in InLoox. In the left column the **function names**, in the middle column the number and permitted **value types** of the **arguments** and in the right column, the value type of the **return value**.

Function	Arguments	Return values
Abs	Number	Number
AddDays	Date, Number	Date
AddHours	Date, Number	Date
AddMinutes	Date, Number	Date
AddMonths	Date, Number	Date
AddSeconds	Date, Number	Date
AddWeeks	Date, Number	Date
AddYears	Date, Number	Date
Alias\$	String, String [,String]	String
Asc	String	Number
AskString\$	String, Boolean, String, Number	String
AskStringChoice\$	String [,Boolean[,String[,Zahl]]]	String
Atrim\$	String	String
Avg	Number [,Boolean]	Number
Barcode	String, String	Barcode
Barcode\$	Barcode	String
BarcodeType\$	Barcode	String
Case\$	Number, String [,String]	String
CheckMod10	String	Number
Chr\$	Number [,Number]	String
ChrSubst\$	String, String [,String]	String
Cond	Boolean, All, All	All
Contains	String, String	Boolean
Continued	-	Boolean
Count	All [,Boolean]	Number
CountIf	Boolean [,Boolean]	Number

Crosstab.Cells.Avg	[Boolean [,Number[,Number]]]	Number
Crosstab.Cells.Max	[Boolean [,Number[,Number]]]	Number
Crosstab.Cells.Min	[Boolean [,Number[,Number]]]	Number
Crosstab.Col\$	[Number]	String
Crosstab.Col	[Boolean]	Number
Crosstab.Row\$	[Number]	String
Crosstab.Row	[Boolean]	Number
Cstr\$	Number, String	String
Date	String	Date
Date\$	Date, [String, [String]]	String
DateHMS	Number, Number, Number	Date
DateInRange	Date, Date, Date	Boolean
DateToJulian	Date	Number
DateYMD	Number, Number, Number	Date
Day	Date	Number
Day\$	Date	String
Distinct	All	All
Dow\$	Date	String
Dow	Date	Number
Drawing	String	Drawing
Drawing\$	Drawing	String
Empty	String	Boolean
Even	Number	Boolean
Exp	Number	Number
Exp10	Number	Number
FirstHeaderThisTable	-	Boolean
Frac	Number	Number
FStr\$	Number, String	String
GeometricAvg	Number [,Boolean]	Number
Hour	[Boolean]	Number
HSL	Number, Number, Number	Number
Hyperlink\$	String, String, Boolean	String

If	Boolean, All [,All]	All
Int	Number	Number
IsNull	All	Boolean
JulianToDate	Number	Date
LastFooterThisTable	-	Boolean
LastPage	-	Boolean
Left\$	String, Number [,Boolean]	String
Len	String	Number
LoadFile\$	String [,String]	String
Locale\$	Number[,String]	String
LocCurr\$	Number[,String]	String
LocCurrL\$	Number[,String]	String
LocDate\$	Date, [,String, [Number]]	String
LocDateTime	String [,String]	Date
LocNumber\$	Number[,String]	String
LocTime\$	Date, [,String, [Number]]	String
Log	Number	Number
Log10	Number	Number
Lower\$	String	String
Ltrim\$	String	String
Max	Number Date	Number Date
Maximum	Number [,Boolean]	Number
Median	Number [,Boolean]	Number
Mid\$	String, Number [,Number]	String
Min	Number Date	Number Date
Minimum	Number [,Boolean]	Number
Minute	[Boolean]	Number
Month	Date	Number
Month\$	Date	String
Now	-	Date
NthLargest	Number, Number [,Boolean]	Number
NthLargestIndex	Number, Number [,Boolean]	Number

NthValue	All, Number [,Boolean]	All
NULL	-	All
NumInRange	Number, Number, Number	Boolean
Odd	Number	Boolean
Ord	String	Number
Page	-	Number
Page\$	-	String
Pow	Number, Number	Number
Previous	All	All
ProjectPath\$	[Boolean]	String
RainbowColor	Number, Number, Number	Number
RegExMatch\$	String, String, Number	String
RemainingTableSpace	[Boolean]	Number
Rep\$	String, Number	String
RGB	Number, Number, Number	Number
Right\$	String, Number [,Boolean]	String
Round	Number, Number	Number
Rtrim\$	String	String
Second	[Boolean]	Number
Sqrt	Number	Number
StdDeviation	Number [,Boolean]	Number
Str\$	Number Date [,Number [,Number]]	String
StrPos	String, String [,Number]	Number
StrRPos	String, String [,Number]	Number
StrSubst\$	String, String [,String]	String
Sum	Number [,Boolean]	Number
Time\$	String	Number
Today	-	Date
Token\$	String, Number, String [,String]	String
ToRTF\$	String	String
TotalPages\$	-	String
UnitFromSCM	Number	Number

Upper\$	String	String
Val	String	Number
Variance	Number [,Boolean]	Number
Woy	Date, [Number]	Number
Year	Date	Number
Year\$	Date	String

Abs

Purpose:

Calculate the absolute value of a number. A negative value will be returned as positive and a positive value will remain unchanged.

Parameter:

Number

Return value:

Number

Example:

Abs(-3) = 3
Abs(3.12) = 3.12

AddDays

Purpose:

Adds the given number of days to the date, or subtracts the number of days when a negative value is entered.

Parameter:

Date

Number

Return value:

Date

AddHours

Purpose:

Adds the given number of hours to the date, or subtracts the number of hours when a negative value is entered.

Parameter:

Date

Number

Return value:

Date

AddMinutes

Purpose:

Adds the given number of minutes to the date, or subtracts the number of minutes when a negative value is entered.

Parameter:

Date

Number

Return value:

Date

AddMonths

Purpose:

Adds the given number of months to the date, or subtracts the number of months when a negative value is entered.

Parameter:

Date

Number

Return value:

Date

AddSeconds

Purpose:

Adds the given number of seconds to the date, or subtracts the number of seconds when a negative value is entered.

Parameter:

Date

Number

Return value:

Date

AddWeeks

Purpose:

Adds the given number of weeks to the date, or subtracts the number of weeks when a negative value is entered.

Parameter:

Date

Number

Return value:

Date

AddYears

Purpose:

Adds the given number of years to the date, or subtracts the number of years when a negative value is entered.

Parameter:

Date

Number

Return value:

Date

Alias\$

Purpose:

Returns the value that is specified for the key (first parameter) in the key/value-pairs (second parameter).

Parameter:

String Expression for the value to be searched

String List of values

(Form: <key=value>| [<key=value>]. To be able to use "|" or "=" in the value or key, place a "\" in front of it.

String (optional) Default if the value cannot be found.

Return value:

String

Example:

Alias\$("DEU", "DEU=Deutschland|USA=United States of America|GB=United Kingdom") Result: Deutschland

Asc

Purpose:

Returns the ASCII-Code of the first character of the string.

Parameter:

String

Return value:

Number

Example:

Asc("A") Result: 65

AskString\$

Purpose:

With this function, information can be requested from the user during printing. A typical example of use for this function would be in a project for a bank transfer form. Information that remains constant, such as name and bank details of the sender, can be integrated directly into the project as fixed text or variables. The transfer amount, however, will almost always be different. With the function AskString\$(), this information can be requested from the user during printing.

At print time, a dialog will appear in which the needed information can be entered.

The dialog allows the entered value to be carried over. Abort with "Cancel".

With the button "All", the entered value will be automatically used for all future result for the AskString\$ function during this print job. This is useful when the value remains constant over all records.

Parameter:

String The first parameter contains some descriptive text that will appear in the dialog. Since this is a formula, fixed text must be entered in quotation marks, for example "Transfer amount:". This first parameter must be entered, all remaining parameters are optional. If no other parameter(s) is/are entered, the first string is also the default setting for the user input.

Boolean (optional)

The second parameter allows you to define whether the dialog should be shown once prior to printing (default, FALSE), or if the dialog should be shown for each record (TRUE).

String(optional)

The third parameter contains the string that appears as the recommended value for the user input. Since this is a formula, fixed text must be entered in quotation marks, for example "50.00 USD".

Number(optional)

The last parameter defines the number of characters that can be entered by the user. A value of 16, for example, allows the user to enter a maximum of 16 characters.

Return value:

String

Example:

```
AskString$("Transfer amount",True,"50.00 USD",16)
```

Opens a dialog with the title "Transfer amount", a recommended value of "50.00 USD" and a maximum of 16 characters. Since the second parameter is TRUE, the dialog will be shown for each record to be printed.

ATrim\$

Purpose:

Removes spaces from the beginning and end of a string.

Parameter:

String

Return value:

String

Example:

Assume that you have an address database which contains, among others, the field COMPANY in which a company's name has been entered. You want to print a label that contains the company name. So as not to waste space or unintentional word wrap, any spaces before or after the company name should not be printed.

The function ATrim\$(COMPANY) removes all spaces that appear in the field COMPANY before or after the company's name.

From " combit GmbH ", the return value would be "combit GmbH".

Avg

Purpose:

Generates the mean of the set of values that is produced by the first argument.

Parameter:

Number Expression of the value to be calculated
Boolean (optional) TRUE: After the output, the values which were stored for the calculation are deleted.
(default: TRUE).

Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return Value:

Number

Example:

Avg(Order_Details.Quantity*Order_Details.UnitPrice)

Barcode

Purpose:

This function converts a string to a barcode. This function can only be used in lists.

Parameter:

String Barcode value (contents)

String Barcode type

The possible barcode types will be listed by the auto-complete function of the wizard. If the barcode cannot be correctly interpreted it will not be printed. Some barcodes require special formats that must be used. Further information can be found in Chapter List of Available Barcodes.

Return value:

Barcode

Example:

Barcode(Upper\$(Name),"3of9")

Barcode\$

Purpose:

Returns the text contents of a barcode.

Parameter:

Barcode

Return value:

String

Example:

Barcode\$(BC_3OF9) Result: "Item 4711"

BarcodeType\$

Purpose:

Returns the type of the barcode as a string.

Parameter:

Barcode

Return value:

String

Case\$

Purpose:

Converts a number, dependant upon the value, into a string. Assignment is made with a formatting string that contains the replacement string for the number values in ascending order.

Parameter:

Number Number to be converted (n). The n-th value of the character string will be copied to the return value string. If enough values do not exist, the character string will remain empty.

String Collection of strings separated by a particular character. If a third parameter does not exist, this is the "|" character, otherwise the first character of this parameter.

String (optional) Separator for the formatting string (default: "|")

Return value:

String

Example:

Case\$(Page(),"0|I|II|III|IV|V|VI|VII|VIII|IX|X")

Result: "III", if Page() = 3

CheckMod10

Purpose:

Calculate the modulo 10 checksum digit of the string.

Parameter:

String A string of digits.

Return value:

Number

Chr\$

Purpose:

Converts a number to a character. This character has the entered number as it's ASCII-Code. For multibyte character sets, the highword is the lead byte, for Unicode, the value is the Unicode code point.

Parameter:

Number

Number (optional) Defines the type of the parameter. 0=multibyte character sets, 1=Unicode. Default is dependent on the InLoox dll used.

Return value:

String

Example:

Chr\$(64) Result: "@"

ChrSubst\$

Purpose:

Searches a character string for a string that is contained in the second parameter. Every occurrence of this string will be replaced by the string defined in the third parameter. If no third parameter exists, the strings will be removed.

Parameter:

String

String

String (optional)

Return value:

String

Example:

ChrSubst\$("Otto", "Oo", "_") Result: "_tt_"

ChrSubst\$("Normalconsumer", "aeiou", "??") Result: "N??rm??lc??ns??m??r"

ChrSubst\$("Normalconsumer", "aeiou") Result: "Nrmlcnsmr"

ChrSubst\$("3.1415926535", ".", ",") Result: "3,1415926535"

Cond

Purpose:

Allows to define conditions. The first parameter is a logical expression that will be evaluated as "True" or "False". If the first expression is "True", the second expression will be returned as the result. If the expression is "False", the third expression will be returned as the result. If no third expression is entered, the return value will assume the following standard values, dependent upon its type:

2. Argument Type	Return value if expression = False
Boolean	False
String	"" (empty String)
Date	Julian Date value 0
Number	0
Drawing	"" (empty String)
Barcode	"" (empty String)

Parameter:

Boolean

All

All (optional)

Return value:

All

Example:

Imagine that your database contains items that are free samples and the items that you normally sell.

Cond(PRICE=0,"Free Sample","Price:"+PRICE+" USD")

Contains

Purpose:

Evaluates if a string contains another string (second parameter).

Parameter:

String

String

Return value:

Boolean

Example:

Contains("Itemnumber: 12345", "1234") Result: True

Continued

Purpose:

Indicates that a text or RTF-object had a page break. This means that the current page is a result of the page break.

Parameter:

-

Return value:

Boolean

Count

Purpose:

Counts the number of values of the first argument. With this function, all NULL values in the argument are included in the count. Use the CountIf() function when you want to disregard NULL values.

Parameter:

All Values to count (sets the value to count). Needed to define the table (subtable) for which the records shall be counted.

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values will be already deleted within the table.

Return value:

Number

Example:

Count(Order_Details.ProductID)

NthLargest(Article.Price,Count(Distinct(Artikel.Stkpreis),True)-1, True)

Calculates the second-smallest value, only taking repeated values into account once.

Countif

Purpose:

Counts the number of values that comply with the condition. Use the function Distinct() when repeated values are only to be counted once.

Parameter:

Boolean Expression for the comparison
Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output.
(default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values will be already deleted within the table.

Return value:

Number

Example:

Countif (Customers.Region="EMEA")

Countif (Distinct(Customers.Region="EMEA"))
counts repeated values once only

Countif (IsNULL (Orders.OrderDate))
counts all values with empty fields

Crosstab.Cells.Avg

Purpose:

Returns the average of the cell contents. Only available in crosstab objects.

Parameter:

Boolean (optional)

True: Only defined values are entered into the calculation (Default: False).

Defined values: if you are, for example, analyzing customers and quarters, the quarters without turnover constitute an undefined value and can be treated separately in the calculation.

Number (optional)

Row layer (0= bottom layer or innermost group, 1= next lowest, ...). Default: 0.

Number (optional)

Column layer (0= bottom layer or innermost group, 1= next lowest, ...). Default: 0.

Return value:

Number

Example:

Crosstab.Cells.Avg(.T.,2,0)

Crosstab.Cells.Max

Purpose:

Returns the largest value of the cell contents. Only available in crosstab objects.

For the parameters and their meaning, see function Crosstab.Cells.Avg().

Crosstab.Cells.Min

Purpose:

Returns the smallest value of the cell contents. Only available in crosstab objects.

For the parameters and their meaning, see function Crosstab.Cells.Avg().

Crosstab.Col\$

Purpose:

Returns the column header for the cell currently being output. Only available in crosstab objects.

Parameter:

Number (optional) Column layer (0= lowest layer or innermost group, 1= next lowest, ...). Default: 0.

Return value:

String

Crosstab.Col

Purpose:

Returns the column index for the cell currently being output. Only available in crosstab objects.

Parameter:

Boolean (optional) True: layer (only cells in this layer count), Default: False.

Return value:

Number

Crosstab.Row\$

Purpose:

Returns the row header for the cell currently being output. Only available in crosstab objects.

Parameter:

Number (optional)

Row layer (0= lowest layer or innermost group, 1= next lowest, ...). Default: 0.

Return value:

String

Crosstab.Row

Purpose:

Returns the row index for the cell currently being output. Only available in crosstab objects.

Parameter:

Boolean (optional) True: layer (only cells in this layer count), Default: False.

Return value:

Number

CStr\$

Purpose:

Formats a number according to a format character string. This is identical to the formatting information for the function printf() in the language C. The first parameter is a number of double precision, and the conversion operator can assume i.e. the following values: 'f', 'g', 'G', 'e', 'E'.

Parameter:

Number

String format string in C-notation, i.e. '%<format>f'

Return value:

String

Example:

```
CStr(Pi,"%5.1f")      Result: " 3.1"  
CStr(100*Pi,"nun: %g")  Result: "nun: 3.141593e+02"
```

Date

Purpose:

Converts a string to a date.

- If the string Contains a dot ".", it will be read in the "d.m.y" format (German).
- If the string contains a diagonal slash "/", it will be read in the "m/d/y" format (US English).
- If the string contains a dash "-", it will be read in the "y-m-d" format (ANSI).
- If the input cannot be correctly interpreted, then the date represents a value that is larger than all other values, (1e100). The return value can be evaluated for correctness using "JulianToDate(1e100)".

Parameter:

String

Return value:

Date

Example:

```
Date("17.10.2006")  
Date("10/17/2006")  
Date("2006-10-17")
```

Tip:

When one or two digits represent the year, all values under 30 will be applied to the 21st century (20xx) and all values over 30 will be applied to the 20th century (19xx).

Date\$

Purpose:

Converts a date, using a format string, into an appropriately formatted string.

Composition of the format string: this is a normal string into which placeholders can be embedded.

Place holder	Description
%d	Day (1..31)
%<n>d	Day to <n> digits
%0<n>d	Day to <n> digits, filled on left with '0's
%w	Weekday (1..7)
%<n>w	Weekday to <n> digits
%0<n>w	Weekday to <n> digits, filled on left with '0's
%m	Month (1..12)
%<n>m	Month to <n> digits
%0<n>m	Month to <n> digits, filled on left with '0's
%y	Year
%<n>y	Year, to <n> digits
%0<n>y	Year, to <n> digits, filled on left with '0's
%D	Weekday, written out
%M	Month, written out
"%e", "%<n>e"	Year in the local calendar (Japan: Emperor's year)
"%g", "%<n>g"	Era of the local calendar (Japan: Emperor's era)
"%g", "%1g"	Single letter, Latin letters
"%gg", "%2g"	Single letter, localized
"%ggg", "%3g"	Long name, localized
"%gggg", "%4g"	Long name, Latin letters
"%x"	Localized date, short form

As long as one of the above formats is used, the optional third parameter can be used to set the locale. If the second parameter contains a valid ISO-Country code, the third parameter can be used to set either the short "0" or long "1" format. See also Chapter List of ISO 3166 Country Codes.

Parameter:

Date	Value to be formatted
String (optional)	Format description or country code
String (optional)	Country code or date format

Return value:

String

Example:

Date\$(Today(),"Date: %D, %d/%m/%y")
Result: "Date: Thursday, 7/11/2006"

Date\$(Today(),"%2wthWeek; %D, %2d/%2m/%4y")
Result: "45th Week, Thursday, 7/11/2006"

Date\$(Today(),"%D, %3d/%02m/%4y")
Result: "Thursday, 7/11/2006"

DateHMS

Purpose:

Converts three numbers for hour, minute and second into a date.

Parameter:

Number	Hour
Number	Minute
Number	Second

Return value:

Date

DateInRange

Purpose:

Evaluates if the date falls within the entered time interval:

Minimum Date: JulianToDate(0)

Maximum Date: JulianToDate(1e100)

Parameter:

Date	Date to be evaluated
Date	Lower limit of the test interval
Date	Upper limit of the test interval

Return value:

Boolean

Example:

```
DateInRange(Date("2006.10.20"),Date("2006.2.29"),Today())
```

Result: True

DateToJulian

Purpose:

Calculates the Julian value of a date. Each day (even those in the past) are assigned a unique number.

Parameter:

Date

Return value:

Number

Example:

DateToJulian(Today()) Result: 2453992

DateYMD

Purpose:

Converts three numbers for day, month and year into a date.

Parameter:

Number	Year
Number	Month
Number	Day

Return value:

Date

Example:

Date(2006, 11, 1)

Day

Purpose:

Determines the day (1...31) of the month and returns it as a number.

Parameter:

Date

Return value:

Number

Example:

Day(Date("17.10.2006")) Result: 17

Day\$

Purpose:

Determines the day (1.31) of the month of a date and returns it as a string.

Parameter:

Date

Return value:

String

Example:

Day\$(Date("17.10.2006")) Result: "17"

Distinct

Purpose:

Affects the higher order aggregate function (e.g. Sum(), Avg(), Count()...) and causes equal values only to be used once in the calculation.

Parameter:

All

Return value:

All

Example:

CountIf(Distinct(Customers.Region="EMEA"))

Dow

Purpose:

Returns the day of the week to a number(1...7), 1=Sunday, 2=Monday, ...

Parameter:

Date

Return value:

Number

Example:

DoW(Today()) Result: 4

If the day for the current date is a Wednesday.

Dow\$

Purpose:

Returns the day of the week as a string in accordance with the country settings, "Sunday", "Monday", ...

Parameter:

Date

Return value:

String

Example:

DoW(Today()) Result: "Wednesday"

If the day for the current date is a Wednesday.

Drawing

Purpose:

Converts a string type file path into a drawing.

Parameter:

String

Return value:

Drawing

Drawing\$

Purpose:

Converts a drawing into a string type file path.

Parameter:

Drawing

Return value:

String

Empty

Purpose:

Evaluates if a string is empty. If it is empty, "True" will be the return value, otherwise "False". Useful, for example, to determine if the field "ADDRESS" is empty, and if it is, in combination with the IF-THEN-ELSE condition `cond()`, either print the contents of the field "ADDRESS" or "POBOX".

The third parameter allows the removal of leading and trailing spaces. If this is evaluated as "True", a string consisting only of multiple spaces will be recognized as empty.

Parameter:

String

Boolean (optional)

Return value:

Boolean

Example:

`Empty("xyz")` Result: False

`Empty("")` Result: True

Even

Purpose:

Evaluates if a number is even. If the number is even, "True" will be returned, otherwise "False".

Parameter:

Number

Return value:

Boolean

Example:

"Page number "+Cond(Even(Page()),"even","odd")

Exp

Purpose:

Calculates the exponential (e^x).

Parameter:

Number

Return value:

Number

Example:

Exp(3) Result: 20.08553692

Exp10

Purpose:

Calculates 10 raised to the power of number (10^x).

Parameter:

Number

Return value:

Number

Example:

Exp10(3) Result: 1000

FirstHeaderThisTable

Purpose:

Returns whether the header of the table is being output for the first time. The function can be used as an appearance condition for the header to prevent it being printed more than once if the table continues onto the next page due to space limitations. The header is then only printed at the beginning of the table.

Parameter:

-

Return value:

Boolean

Frac

Purpose:

Calculates the fractional part of a number

Parameter:

Number

Return value:

Number

Example:

Frac(Pi) Result: 0.1415926535

FStr\$

Purpose:

Formats a number according to the format string.

These consist of the following characters ("if negative" refers to the value to be formatted):

*	Digit or '*'-Prefix
\$	Local currency symbol
-	Digit or sign, if negative
+	Digit or sign
(Digit or '('-Prefix if negative
)	')'-Postfix if negative
#	Digit or space prefix
&	Digit or '0'
.	Decimal point
,	Comma, or space prefix

A prefix is a sign that precedes a value, when needed. The expression FStr\$(1, "****") results in "***1". The value "1" is preceded by the characters "****".

A Postfix is a character that, when needed, is placed after a number.

These formatting characters can be combined as needed. If the number is too large for the desired format, a "" string will be returned.

With the third (optional) parameter, additional formatting can be accomplished.

Value	Description
1	Removal of leading spaces. The use is similar to the functions RTrim\$() and LTrim\$().
2	Empty string if value NULL.
3	Removal of leading spaces and empty strings when value is 0

Parameter:

Number
String Format string
Number (optional) Additional formatting

Return value:

String

Example:

```
FStr(3.142, "#")      Result: "3"  
FStr(5003.1, "#,###.&&")  Result: "5.003,10"  
FStr$(3.142, "#,###")    Result: "3,142"  
FStr$(3.142, "#####")   Result: "*****"  
FStr$(3.142, "(###)")    Result: " 3,142 "  
FStr$(-3.142, "(###)")   Result: "(3,142)"  
FStr$(3.142, "+###")     Result: "+3,142"  
FStr$(3.142, "#.###")    Result: " 3,142"  
FStr$(-3.142, "-###")    Result: "-3,142"  
FStr$(3.142, "&&&.&&&")   Result: "003,142"  
FStr$(3.142, "****.****") Result: "****3,142"  
FStr$(3.142, "$$$ $$$")  Result: "$$3,142"  
FStr$(3.142, "###.****") Result: " 3,142"  
FStr$(5003.1, "#,###.&&") Result: "5.003,10"  
FStr$(3.142, "#####")   Result: "  3"
```

GeometricAvg

Purpose:

Calculates the geometric average of the set of values that result from the first parameter / formula.

Parameter:

Number Expression for the value to be averaged.

Boolean (optional) True: The values which were stored for the calculation are deleted after output. (default: TRUE).

Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Hour

Purpose:

Determines the hour of the date and returns it in number format. If the parameter is not used, the hour of the print time will be returned.

Parameter:

Date (optional)

Return value:

Number

Example:

A condition can evaluate if the current hour has the value "10". The value of the current hour must be determined and then compared to the value "10".

```
Hour()=10
```

HSL

Purpose:

Calculates a color value in the HSL color space (Hue, Saturation, Lightness)

Parameter:

Number	Hue[0-360]
Number	Saturation [0-1]
Number	Lightness [0-1]

Return value:

Number

Hyperlink\$

Purpose:

The function Hyperlink\$ creates a hyperlink text that can be inserted using an export module.

When available, the hyperlink will only be embedded if the third parameter returns a result of "True" (=default).

Parameter:

String		Text
String		Hyperlink
Boolean	(Optional)	Embed

Return value:

String

Example:

```
Hyperlink$("combit","http://www.combit.net")
```

Tip:

To optionally use a hyperlink only on a HTML page, you need to use the InLoox variable LL.OutputDevice:

```
Hyperlink$("combit","http://www.combit.net",LL.OutputDevice="HTML")
```

If an object text contains the character string:

```
<!--begin:hyperlink="target"-->"Display text"<!--end:hyperlink-->
```

then a hyperlink will be automatically created in the exported HTML page. The hyperlink function automatically creates a string with the correct syntax.

If

see Cond

Int

Purpose:

Calculates the integer value of a number. The value will be truncated.

Parameter:

Number

Return value:

Number

Example

Int(3,1) Result: 3

IsNULL

Purpose:

Checks whether the transferred value or the result of the expression is NULL, e.g. an empty date field.

Parameter:

All

Return value:

Boolean

JulianToDate

Purpose:

Interprets a number as a Julian date (each day is assigned a unique number) and returns the appropriate date.

Parameter:

Number

Return value:

Date

Example:

JulianToDate(2453992) Result: 2006.09.14

LastFooterThisTable

Purpose:

Returns whether the footer of the current table is being output for the last time. This function can be used as an appearance condition for the footer, in order to prevent the footer being printed if the table is continued on the next page due to space limitations. The footer is then only printed on the last page of the table.

Parameter:

-

Return value:

Boolean

Lastpage

Purpose:

Returns if the current page is also the last page.

Note: This function can only be used in the footer lines of tables or in objects linked with tables! In all other cases, the result of Lastpage() is always False.

Parameter:

-

Return value:

Boolean

Example:

Cond>Lastpage(),"Total sum","Subtotal")

Left\$

Purpose:

Reduces a string from the right so that only the number of characters set under Number remain. If the original string is already small enough, it is not affected.

Parameter:

String The value to be shortened
Number maximum number of positions of the result
Boolean (optional)

True: The cut off value is ended with "..." (Default: False). With numbers < 3 the setting is ignored.

Return value:

String

Examples:

If you had a customer database that contains, amongst other things, the field NAME for the surname. You now wish to search for all customers whose surname starts with "C". To do this, you must first identify the starting letters.

Left\$(NAME, 1) Result: the first letter of the NAME string.

Left\$("combit", 2) Result: "co"

Left\$("combit", 4,.T.) Result: "c."

Left\$("combit", 2,.T.) Result: "co"

Len

Purpose:

Returns the number of characters in a string.

Parameter:

String

Return value:

Number

Example:

Len("1234"+"12") Result: 6

LoadFile\$

Purpose:

Outputs the contents of the file as a character string.

Parameter:

String

String (optional) When the file is not available, the value set here is used.

Return value:

String

Example:

```
LoadFile$("C:\log.txt","File not found!")
```

Locale\$

Purpose:

Returns information about the country settings, for example currency, decimals, separators, language and country code. The code for the appropriate country is entered in the second parameter, if no second parameter is used the default country settings will be used.

Parameter:

Number	Index of Locale Entry
String(optional)	Country code

Return value:

String

Example:

Locale\$(42,"USA") Result: "Monday"

Possible constants for index entry:

http://msdn.microsoft.com/library/default.asp?url=/library/en-us/intl/nls_8rse.asp

See also Chapter List of ISO 3166 Country Codes.

LocCurr\$

Purpose:

Returns a string with the valid currency format without the currency symbol for the entered country.

Parameter:

Number	Value to be formatted
String(optional)	Country code

Return value:

String

Example:

LocCurr\$(123,"USA") Result: "123.00"

See also Chapter List of ISO 3166 Country Codes.

LocCurrL\$

Purpose:

Returns a string with the valid currency format and currency symbol for the entered country.

Parameter:

Number Value to be formatted

String (optional) Country code

Return value:

String

Example:

LocCurr\$(123,"USA") Result: "\$123.00 "

See also Chapter List of ISO 3166 Country Codes.

LocDate\$

Purpose:

Returns a string with the valid date format for the entered country.

Parameter:

Date	Value to be formatted
String (optional)	Country code
Zahl (optional)	Format

Return value:

String

Example

LocDate\$(Date("17.11.2006"),"USA") Result: "11/17/2006"

See also Chapter List of ISO 3166 Country Codes.

LocDateTime

Purpose

Converts the character string into a date (with time if required) in the relevant format for the country.

Parameter:

String	Date
String (optional)	Country code

Return value:

Date

Example

LocDateTime(Date("17.11.2006"),"DEU") Result: "17.11.2006"

See also Chapter List of ISO 3166 Country Codes.

LocNumber\$

Purpose:

Returns a string with the valid number format for the entered country.

Parameter:

Number Value to be formatted
String (optional) Country code

Example:

LocNumber\$(123,"USA") Result: "123.00"

See also Chapter List of ISO 3166 Country Codes.

LocTime\$

Purpose:

Returns a string with the valid time format for the entered country.

Parameter:

Date Value to be formatted
String (optional) Country code
Number (optional) Format

Example:

LocTime\$ (Now(),"USA") Result: 9:05:22 AM"

See also Chapter List of ISO 3166 Country Codes.

Log

Purpose:

Calculates the natural logarithm $\ln(x)$.

Parameter:

Number

Return value:

Number

Example:

Log(Exp(1)) Result: 1

Log10

Purpose:

Calculates the base-10 logarithm $\log(x)$.

Parameter:

Number

Return value:

Number

Example:

Log10(1000) Result: 3

Lower\$

Purpose:

Converts the characters of a string into lower case letters.

Parameter:

String

Return value:

String

Example:

Lower\$("George") Result: "george"

LTrim\$

Purpose:

Removes the leading spaces of a string.

Parameter:

String

Return value:

String

Example:

LTrim\$(" George") Result: "George"

Max

Purpose:

Returns the largest of the two values.

Parameter:

Number orDate
Number orDate

Return value:

Number orDate

Maximum

Purpose:

Calculates the maximum of the set of values that result from the first parameter / formula.

Parameter:

Number

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

Maximum(Order_Details.ProductID@Products.ProductID:UnitsInStock)

Median

Purpose:

Calculates the median of the set of values that result from the first parameter / formula.

Parameter:

Number Expression for the value to be averaged.
Boolean (optional)

The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

Median(UnitsInStock)

Mid\$

Purpose:

Returns a part of a string. The desired number of characters starting at the starting position will be returned.

If the third parameter is not used, the string will be returned from the starting position to the end.

The first character of the string has the Position 0.

Parameter:

String

Number Starting position

Number (optional) Number of characters to be displayed

Return value:

String

Example:

```
Mid$("Normalconsumer",6)            Result: "consumer"  
Mid$("Normalconsumer",6,30)        Result: "consumer"  
Mid$("Normalconsumer",6,3)         Result: "con"  
Mid$(Name,0,6)                      Result: "Normal"
```

Min

Purpose:

Returns the smallest of the two values.

Parameter:

Number orDate

Number orDate

Return value:

Number orDate

Minimum

Purpose:

Calculates the minimum of the set of values that result from the first parameter / formula.

Parameter:

Number

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

Minimum(Order_Details.ProductID@Products.ProductID:UnitsInStock)

Minute

Determines the minute of the entered date, and returns the result as a number. If the parameter is not used, the minute of the time of printing will be returned.

Parameter:

Date (optional)

Return value:

Number

Example:

Whether the current minute has the value "10" should be determined by a condition. The value of the current minute will be determined and compared with the value "10":

Minute()=10

Mode

Purpose:

Calculates the mode (most common value) of the set of values that result from the first parameter / formula.

Parameter:

Zahl Expression for the value to be examined.

Boolean (optional) The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

Mode(UnitsInStock)

Month

Purpose:

Determines and returns the month (1...12) as a number.

Parameter:

Date

Return value:

Number

Example:

Month(Date("2006.10.17")) Result: 10

Month\$

Purpose:

Determines and returns the month (1...12) as a string.

Parameter:

Date

Return value:

String

Example:

Month\$(Date("2006.10.17")) Result: "10"

Now

Purpose:

Returns the current date and time.

Parameter:

-

Return value:

Date

NthLargest

Purpose:

Calculates the nth-largest value of the set of values that result from the first parameter / formula.

Parameter:

Number

Number <n>, i.e. the index for the value which is to be returned (1-based).

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

NthLargest(Order_Details.ProductID,2) calculates the second-largest number

NthLargestIndex

Purpose:

Calculates the index of the nth-largest value of the set of values that result from the first parameter / formula.

Parameter:

Number

Number <n>, i.e. the index for the value which is to be returned (1-based).

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

NthLargestIndex(Order_Details.ProductID,2)

NthValue

Purpose:

Calculates the nth value of the set of values that result from the first parameter / formula.

Parameter:

All

Number <n>, i.e. the index for the value which is to be produced, calculated e.g. with NthLargestIndex().

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

NthValue(NthLargestIndex(Order_Details.ProductID,2))

NULL

Purpose:

Returns a NULL value (value not available).

Parameter:

-

Return value:

All

NumInRange

Purpose:

Evaluates if a number falls within the desired range.

Parameter:

Number

Number Upper limit

Number Lower limit

Return value:

Boolean

Example:

NumInRange(Page(),1,10)

Result: True, if the page number is between 1 and 10.

Odd

Purpose:

Evaluates if a number is odd. If the number is odd "True" will be returned, otherwise "False".

Parameter:

Number

Return value:

Boolean

Example:

"Page number "+Cond(Odd(Page()),"odd","even")

Ord

Purpose:

Returns the ASCII value of the first character.

Parameter:

String

Return value:

Number

Example:

Ord("Combit") Result: 67

Page

Purpose:

Returns the current page number.

Parameter:

-

Return value:

Number

Example:

Case(Odd(Page()),"Even","Odd")+ " page number"

Page\$

Purpose:

Returns the page number of the printed page as a character string.

Parameter:

-

Return value:

String

Example:

"Page "+Page\$()+"/"+TotalPages\$() Result: Page 1/3

Pow

Purpose:

Corresponds to the function $(\text{Base}) ^ (\text{Exponent})$.

Parameter:

Number Base

Number Exponent

Return value:

Number

Example:

Pow(2,3) Result: 8

Previous

Purpose:

Returns the previous value of the variable, field or formula, i.e. the value it had for the last record.

Parameter:

All Variable, field or formula

Return value:

All

Example:

Previous(NAME) Result: "consumer"

ProjectPath\$

Purpose:

Returns the path of the project file, optionally including the file name (otherwise with "\" at the end)

Parameter:

Boolean True: Sets that the path is returned including the file name (Default: False).

Return value:

String

Example:

ProjectPath\$(.T.) Result: C:\Program Files\LL12\crosstab.lsr

RainbowColor

Purpose:

Calculates a color value between violet and red corresponding to the value of the first parameter e.g. for rainbow colors in crosstabs.

Parameter:

Number Value to be displayed.

Number Limiting value for violet.

Number Limiting value for red.

Return value:

Number

RegExMatch\$

Purpose:

Returns the part of the string that corresponds to the regular expression or the group passed in the third parameter.

The regular expression corresponds to Pearl 5 Syntax, which in most details equals the regular expression syntax of the Visual Basic Scripting engine.

Parameter:

String
String
Number

Return value:

String

Example:

Division of the "STREET" field to street and number:

```
"Street: " + RegExMatch$(STREET,"(?:\w* )+(\d+[lw ]*$)",1)
"Number: " + RegExMatch$(STREET,"(?:\w* )+(\d+[lw ]*$)",2)
```

```
RegExMatch$("test1234xyz0815", "[0-9]+") Result: "1234"
```

RemainingTableSpace

Purpose:

Returns the space available to data and group lines in a table object. The parameter defines the unit of the return value. The function can be used to carry out conditional page breaks before group lines, e.g. "Page break before only 5% space is left".

Parameter:

Boolean (optional) TRUE: the value is in units which are independent of the system (SCM-units), FALSE: the value is a percentage of the entire table size (default: FALSE).

Return value:

Number

Rep\$

Purpose:

Returns a string that contains the appropriate number of strings defined in the first parameter.

Parameter:

String
Number

Return value:

String

Example:

Rep\$("-",10) Result: "-----"
Rep\$("+",5) Result: "+-+-+-+--"

RGB

Purpose:

Calculates the color value using the relative red, green and blue saturation values (between 0 and 255). No saturation has the value 0, full saturation the value 255. This function can be used to set the font color using a formula.

Parameter:

Number red saturation

Number green saturation

Number blue saturation

Return value:

Number

Example:

Cond(Amount<0, RGB(255,0,0), RGB(0,0,0))

Result: red for negative amounts

Right\$

Purpose:

Reduces a string from the left so that only the number of characters set under Number remain. If the original string is already small enough, it is not affected.

Parameter:

String
Number
Boolean (optional)

True: The cut off value starts with "..." (Default: False). If Number < 3 the setting is ignored.

Return value:

String

Example:

Right\$("normalconsumer", 8) Result: "consumer"

Right\$("normalconsumer", 11, .T.) Result: "...consumer"

Round

Purpose:

Rounds a value to the entered number of decimal places. Default is 0.

Parameter:

Number

Number (optional)

Return value:

Number

Example:

Round(3.1454,2) Result: 3,15
Round(3.1454) Result: 3

RTrim\$

Purpose:

Removes spaces from the end of a string.

Parameter:

String

Return value:

String

Example:

RTrim\$("John ") Result: "John"

Second

Determines the second of the entered date and returns the result as a number. If the parameter is not used, the second of the print time will be returned.

Parameter:

Date (optional)

Return value:

Number

Sqrt

Purpose:

Calculates the square root of a number.

Parameter:

Number

Return value:

Number

Example:

Sqrt(4) Result: 2

StdDeviation

Purpose:

Calculates the standard deviation of the set of values that result from the first parameter / formula.

Parameter:

Number

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

StdDeviation(Order_Details.Quantity*Order_Details.UnitPrice)

Str\$

Purpose:

Converts a number into a string. The number will be formatted with 6 decimal places that may be rounded. The length is variable.

Parameter:

Number

Number (optional) Defines the length of the string (default:6). If the number is too large for this format, the resulting string may then be longer than desired. If the number is too small, spaces will be attached dependent upon the prefix, right (negative) or left (positive).

Number (optional) Defines the precision (number of decimal places). If the number is positive, the number will be displayed as a floating-point number, if negative in scientific format.

Return value:

String

Example:

Str\$(Pi)	Result: "3.141593"
Str\$(Pi,3)	Result: " 3"
Str\$(Pi,3,0)	Result: " 3"
Str\$(-Pi,12,-3)	Result: "-3.141e+00"
Str\$(Page())	Result: "5.000000"
Str\$(Page(),10)	Result: " 5"
Str\$(Page(),-10)	Result: "5 "

StrPos

Purpose:

Returns the position of the nth appearance of a search string. The third parameter determines which appearance will be returned. Default is 1.

The first character in the string has the position 0.

-1 as return value signifies the search string no longer appears.

Parameter:

String

String Search string

Number (optional)

Return value:

Number

Example:

```
StrPos("Normalconsumer","or")      Result: 1  
StrPos("Normalconsumer","r")      Result: 2  
StrPos("Normalconsumer","r",1)    Result: 2  
StrPos("Normalconsumer","r",2)    Result: 13
```

StrRPos

Purpose:

Returns the position of a search string within a string. This is a backwards search. The third parameter, determines which appearance will be returned. Default is 1.

The first character in the string has the position 0.

-1 as return value signifies the search string no longer appears.

Parameter:

String

String Search string

Number (optional)

Return value:

Number

Examples:

StrRPos("Normalconsumer","or")	Result: 1
StrRPos("Normalconsumer","r")	Result: 13
StrRPos("Normalconsumer","r",1)	Result: 13
StrRPos("Normalconsumer","r",2)	Result: 2

StrSubst\$

Purpose:

Searches a string for the appearance of a search string and replaces it with the string contained in the third parameter (replacement string). If no third parameter is used, the string located using the search string will be deleted.

Parameter:

String

String Search string

String (optional) Replacement string

Return value:

String

Example:

Assume that you want to print address labels that contain the company name. You do not have much space available on the label and cannot afford to completely print long company names, for example, "Forrer Construction, Incorporated".

With the expression StrSubst\$(COMPANY,"Incorporated","Inc.") every appearance of "Incorporated" in the COMPANY field will be replaced with "Inc."

Sum

Purpose:

Calculates the sum of the parameter / formula in the parameter.

Parameter:

Number

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

Sum (Order_Details.UnitPrice)

Time\$

Purpose:

Returns the current time in string format.

The following formats are available:

Placeholder	Description
%h	Hours in 24 hour format
%H	Hours in 12 hour format
%m	Minutes
%s	Seconds
%P	Display the part of day (A.M. / P.M.)
%p	Display the part of day (a.m. / p.m.)

Parameter:

String

Return value:

String

Example:

Time\$("%02h:%02m:%02s") Result: "18:30:45"

Today

Purpose:

Returns the current date.

Parameter:

-

Return value:

Date

Example:

`Date$(Today(),"%D, %m.%d.%4y")`

Result: "Friday, 11/8/2006"

Token\$

See Case\$

ToRTF\$

Purpose:

Returns a string in RTF-format. This is necessary because some strings may contain one of the specially defined RTF-format symbols. ('\'', '{' or '}').

Parameter:

String

Return value:

String

Example:

If, for example, the field PRODCODE could contain one of the characters, then the text should be inserted in the following way:

"<<SALUTATION>> <<NAME>>, You have received our product <<PRODUCT>>, Code <<ToRTF\$(PRODCODE)>>..."

TotalPages\$

Purpose:

Returns the total number of pages. The returned character string is replaced by the total number of pages when printing.

Please note when using this function that the timing behavior of the print process can be affected. A progress bar may reach 100% faster, but because of further processing of the output, there may be a delay before the actual printout is produced. No calculations may be performed with the result of this function.

Parameter:

-

Return value:

String

Example:

"Page "+Page\$()+"/"+TotalPages\$() Result: Page 1/3

UnitFromSCM

Purpose:

Converts a SCM-Unit (1/1000 mm) to the print unit (inch/mm). Important for the definitions of property values independent of the selected print unit.

Parameter:

Number

Return value:

Number

Example:

```
Cond(Page())=1,UnitFromSCM(100000),UnitFromSCM(20000))
```

Result: 10cm for Page 1, 20 cm for the other pages.

Upper\$

Purpose:

Converts the characters of a string to capital letters.

Parameter:

String

Return value:

String

Example:

Upper\$("Otto") Result: "OTTO"

Val

Purpose:

The string is interpreted and returned as a number. If an error occurs, the return value is 0. The decimal sign must always be entered as ".".

Parameter:

String

Return value:

Number

Example:

```
Val("3.141")           Result: 3.141
Val("3,141")           Result: 3
Val("3.141e2")         Result: 314.2
Val(ChrSubst$("3,141", ",", ".")) Result: 3.141
```

Variance

Purpose:

Calculates the variance of the set of values that result from the first parameter / formula.

Parameter:

Number

Boolean (optional) TRUE: The values which were stored for the calculation are deleted after output. (default: TRUE). Please note that the stored calculation values are generally deleted for every (sub)table end. The second parameter only decides whether the values are already deleted within the table.

Return value:

Number

Example:

Variance(Order_Details.Quantity*Order_Details.UnitPrice)

Woy

Purpose:

Returns the week number of a given date.

The optional second parameter determines the setting for the first week of the year.

0	Week with the first working day
1	Week of January, 1
2	First week with at least 4 days
3	First week with 7 days
4	Week with the first Monday

Parameter:

Date
Number (optional)

Return value:

Number

Year

Purpose:

Determines the year of a date and returns it as a number.

Parameter:

Date

Return value:

Number

Example:

Year(Today()) Result: 2006
Year\$(Date("1.1.2006")) Result: 2006

Year\$

Purpose:

Determines the year of a date and returns it as a string.

Parameter:

Date

Return value:

String

Example:

Year\$(Today()) Result: "2006"
Year\$(Date("1.1.2006")) Result: "2006"

List of Available Barcodes**List of Available Barcodes**

InLoox supports a wide range of barcode formats. Normally, no special printers, fonts, etc. are necessary, the barcodes will be printed directly from InLoox.

The following bar codes are available in InLoox:

2-of-5 DataLogic
2-of-5 Industrial
2-of-5 Interleaved
2-of-5 Matrix
3-of-9
Aztec
Codabar
Code 128
Code 39
Code 39 with CRC
Code 93
CODE11
Datamatrix
DP-Identcode
DP-Leitcode
EAN 128
EAN 13
EAN 14
EAN 8
extended Code 39
FIM
German Parcel
Japanese Postal Code
Maxicode
Maxicode/UPS
MSI
MSI PLAIN
MSI+10+10
MSI+10+CD
MSI+11+10
PDF417
Pharma-Zentral-Nummer
Postnet
RM4SCC, KIX(®)
Royal Mail with CRC
SSCC/NVE
UCC-14
UPC-A
UPC-E

See also:

- ▶ 2-of-5 Industrial
- ▶ 2-of-5 Interleaved (ITF)
- ▶ 2-of-5 Matrix
- ▶ 2-of-5 Datalogic

- ▶ Aztec
- ▶ Codabar
- ▶ Alpha39 (or also 3-of-9 or Code39)
- ▶ Code39 with CRC
- ▶ Code93 (simple and extended)
- ▶ Code128
- ▶ CODE11
- ▶ Datamatrix
- ▶ DP-Identcode
- ▶ DP-Leitcode
- ▶ EAN128
- ▶ EAN13, JAN13
- ▶ EAN14, UCC14
- ▶ EAN8, JAN8
- ▶ FIM Barcode
- ▶ German Parcel
- ▶ Japanese Postcode
- ▶ MSI
- ▶ Maxicode and PDF417
- ▶ Pharma-Zentral-Nummer
- ▶ Postnet
- ▶ RM4SCC, KIX(
- ▶ Royal Mail
- ▶ SSCC/NVE
- ▶ UPC-A
- ▶ UPC-E



2-of-5 Industrial

A number code of low information density.

Permitted characters: '0'..'9'

A Code is $(14 * \text{number of characters} + 18)$ bar widths wide.



2-of-5 Interleaved (ITF)

A number code of high information density, requires high print quality.

Permitted characters: '0'..'9'. The number of characters must be even.

A code is $(9 \times \text{number of characters} + 9)$ bar widths wide.



2-of-5 Matrix

A number code of high information density, requires high print quality.

Permitted characters: '0'..'9'.

A Code is (10* number of characters +18) bar widths wide.



2-of-5 Datalogic

A number code of high information density, requires high print quality.

Permitted characters: '0'..'9'.

A code is (10* number of characters +11) bar widths wide.



Aztec

2D barcode system with high information density and excellent scanability, which is highly optimized and has high error tolerance. The Aztec barcode is mostly used in medicine technology, transport sector and administration. Character set: All available and unprintable characters. Minimum length 12 characters up to approx. 3000.



Codabar

The Codabar-Code is a numerical code with 6 special characters. The information density is low. The code must conform to the following format:

"fnnnnf"

with

- f = Frame code ('A', 'B', 'C', or 'D')
- nnnnn = arbitrary quantity of numbers or special characters ('0'..'9', '-', '\$', ':', '/', '.', '+')

Every character is either 2*3+6*1 (characters '0'..'9', '-', '\$') or 3*3+5*1 (characters ':', '/', '.', '+', 'A'..'D') bar widths wide. The characters for the frame code will not be printed with the text.



Alpha39 (or also 3-of-9 or Code39)

One of the few codes that can also display letters. All characters must be entered; the customary bracketing with '*' should also be entered (*TEST*).

Permitted characters: ' ','\$','/','%','*','+','-', '0'..'9','A'..'Z'

The expanded code can be activated by a combination of the standard code: for example: '+A' -> 'a'. Every character is 16 bar widths wide, a text has (16*number of characters -1) bars.



Code39 with CRC

Character set: ' ','\$','/','%','*','+','-','0'..'9','A'..'Z'



Code93 (simple and extended)

Code93 is an extension of Code39, but has the advantage that it is somewhat smaller. It covers the complete 128 bytes of the ASCII character set, including zero. This must be transferred as chr\$(255).

It contains two check digits that are automatically generated by InLoox.

The characters consist of 9 bar widths, that each have 3 bars and 3 spaces. There are two options for the extended code:

- transfer of the shift character from the host program as

\$ chr\$(254)

% chr\$(253)

/ chr\$(252)

+ chr\$(251)

- transfer of the desired character, L&L adds the appropriate shift character.



Code128

This code is basically identical to EAN128, with the exception that the first character (FNC1 ... FNC4) is defined by the user.

The explanations with EAN128 apply here as well.



CODE11

Character set: '0'..'9','-'.

Code 11 has, depending on the length, 1 or 2 check digits. InLoox calculates only 1 instead of 2 check digits if the length of the text is a maximum of 10 characters.



Datamatrix

(Application dependent)

This barcode is used in many different industrial areas. Most printable characters can be displayed. In addition, very dense information is provided and can still be scanned correctly with extensive damage. You can freely choose symbol size or choose a symbol size which is automatically adapted to object size. These properties can be found in the option dialog of the barcode.



DP-Identcode

A number code of high information density, requires high print quality.

Permitted characters: '0'..'9'.

The code must conform to the following format:

"nn.nnnnn.nnnn"

"nn.nnnn.nnnnn"

"nn.nnn.nnnnnn"

A Code is $(9 \times \text{Number} + 9)$ bar widths wide.

Width: 32,0mm - 58,5mm (Clear zone right and left: minimum 5mm). height: 25mm.

The check digit is calculated automatically; Relation: 4:9; Special code of 2 of 5 IL.



DP-Leitcode

A number code of high information density, requires high print quality.

Permitted characters: '0'..'9'.

The code must conform to the following format:

"nnnnn.nnn.nnn.nn"

A Code is $(9 \times \text{Number} + 9)$ bar widths wide.

Width: 37,25 mm - 67,5 mm (Clear zone right and left: minimum 5mm). Height: 25mm.

The check digit is calculated automatically; Relation: 4:9; Special code of 2 of 5 IL.



EAN128

This code can display all printable ASCII-characters, as well as non-explicit characters, umlauts and 'ß'. The text can have any appearance. The width is not easy to display because certain characters have different widths.

Special characters must be replaced with:

Character Replacement [using chr(...), chr\$(...)]

NUL chr\$(255)

FNC1 chr\$(254)

FNC2 chr\$(253)

FNC3 chr\$(252)

FNC4 chr\$(251)



EAN13, JAN13

The EAN13-(International Article Numbering)-Code is a very common barcode. The number string used with EAN13 must conform to one of the following formats:

"cc|nnnnn|aaaaa" (normal EAN13)

"cc|nnnnn|aaaaa|xx" (EAN13 for periodicals, "ISSN")

"cc|nnnnn|aaaaa|xxxxx" (EAN13 for books, "Bookland")

"ppp|nnnn|aaaaa" (normal EAN13)

"ppp|nnnn|aaaaa|xx" (EAN13 for periodicals, "ISSN")

"ppp|nnnn|aaaaa|xxxxx" (EAN13 for books, "Bookland")

with

	Description	ValueRange
Cc	Country code	c='0'..'9'
Ppp	Product code	
Nnnnn	Company code	n='0'..'9'
aaaaa	Article code	a='0'..'9'
' '	= Character code chr(124)	
xx, xxxxx	Supplemental code	x='0'..'9'

The check digit will be calculated and attached automatically. Each character is 7 bar-widths wide, a code should have a minimum width of $(12 \cdot 7 + 11) \cdot 0.3 \text{ mm} = 2.85 \text{ cm}$.

Ideal size (bar symbol) nominal size SC2:

Width = 31.4 mm

Height = 24.5 mm

Minimum offset that should be kept free around the symbol:

left: 3.6 mm

top: 0.3 mm

right: 2.3 mm

bottom: 0.0 mm

The text may partially exceed this area.



EAN14, UCC14

These number codes require a high print quality.

Permitted characters: '0'..'9'. The code must be 14 characters long.



EAN8, JAN8

The number string in EAN8 must conform to the following format:

"nn|nnnnn"

with

- n = '0'..'9'
- | = Character code chr(124)

Each character is also 7 bar widths wide, a code should then have a minimum width of $(8*7+11)*0.3\text{ mm}=2.01\text{ cm}$.

Ideal size (bar symbol) nominal size SC2:

- dx : 22.1 mm
- dy: 19.9 mm

Minimum offset that should be kept free around the symbol:

- left: 2.3 mm
- top: 0.3 mm
- right: 2.3 mm
- bottom: 0.0 mm (if printed, otherwise 0.3 mm)

The text may partially exceed this area.



FIM Barcode

Minimum size: $1/2" * 5/8" = 12.7 \text{ mm} * 15.87 \text{ mm}$.

Transfer values: "A", "B" or "C".

The FIM-Barcode is always printed to the size required by the United States Postal Service. It can expand beyond the object frame.



German Parcel

A number code of low information density.

Permitted characters: '0'..'9'.

A Code is $(14 * \text{Number} + 18)$ bar widths wide.

Relation: 1:2



Japanese Postcode

Japanese postcode.

Allows characters: n=[0-9], Address=[A-Z], [0-9], [-]

Formats: nnn-nnnn, then max. 13 character address



MSI

MSI is a binary barcode in which every character consists of 8 bars.

The character set is limited to '0'..'9' and is suitable only for the display of numbers. Commonly used in libraries.



Maxicode and PDF417

(Application dependent)

Character set: Most available and also non-printable characters. To use non-printable characters in barcode text, tags in the form {binary:xx} can be used in the barcode text, with xx standing for any sequence of two digit hexadecimal numbers. This is especially important when Maxicodes are to be created to UPS specifications. The required special characters can be entered in this way.

Example 1: To encode a NULL and a backspace (BS) symbol in the data, use "{binary:0008}" (corresponds to "{binary:00}{binary:08}").

Example 2: To pass on a page break, use "Hello{binary:0d0a}World".



Pharma-Zentral-Nummer

Character set: '0'..'9'

The PZN code is used for identifying pharmaceuticals. The pharmaceutical central numbers (=PZN) are distributed by the "Informationsstelle für Arzneispezialitäten IfA GmbH". The represented string of numbers has to correspond to the following format:

"nnnnnn"



Postnet

This is a barcode used by the United States Postal Service. It is available in three variants. In reference to placement and offset from other objects, please refer to the specifications in the appropriate literature.

5-digit: "nnnnn"

10-digit: "nnnnn-nnnn"

12-digit: "nnnnn-nnnnnn"

Minimum size: $1.245'' \times 4/16'' = 31.6 \text{ mm} \times 6.35 \text{ mm}$ (10-digit).

Minimum bar spacing $1/24'' = 1.058 \text{ mm}$.

The error-correction digit will be automatically amended.

This barcode will be automatically printed in the correct size.



RM4SCC, KIX®

Character set: '0'..'9', 'A'..'Z', 'a'..'z'.

This barcode is used by the Dutch post in distribution. Make sure to pass on a content according to the specification. For further information please contact the Dutch post.



Royal Mail

Character set: '0'..'9', 'A'..'Z', 'a'..'z'.

This code is used with the mail merge procedures "Cleanmail" and "Mailsort" by the British "Royal Mail" to encode postal codes. Royal Mail postal codes contain a combination of numbers and letters. The character set therefore includes the numbers 0..9 and capital letters A..Z. The space character is not included.

Either the postal code (e.g. LU17 8XE) or the postal codes with an additional "Delivery Point" (e.g. LU17 8XE 2B) are encoded. The maximum number of usable spaces is therefore limited to 9 digits.



SSCC/NVE

The SSCC (Serial Shipping Container Code) barcode is being increasingly used in the logistics industry.

Character set: [0-9]

Format: nnnnnnnnnnnnnnn (17 figures)



UPC-A

The UPC-A-Code (Universal Product Code) is common in the USA. The code must conform to the following format:

"c|nnnnn|aaaaa"

with

- c = Number system
- nnnnn = Company code
- aaaaa = Article code
- | = Character code chr(124)

The check digit will be calculated and attached automatically. Each character is also 7 bar widths wide, a code should then have a minimum width of $(13 \cdot 7 + 6) \cdot 0.3 \text{ mm} = 2.88 \text{ cm}$.



UPC-E

The UPC-E-Code (Universal Product Code, short version) is common in the USA. The code must conform to the following format:

"c|nnnnn"

with

- c = Number system
- | = Character code chr(124)
- nnnnn = Code, interpretation dependent upon the last digit

The check digit will be calculated and attached automatically. Each character is also 7 bar widths wide, a code should then have a minimum width of $(13 \cdot 7 + 6) \cdot 0.3 \text{ mm} = 2.88 \text{ cm}$.



List of ISO 3166 Country Codes

The following country codes can be used with, among others, the Loc.. functions. (CountryCode: Prefix):

ALB	355	COL	57	GTM	502	NIC	505	SVK	42
ARG	54	CRI	506	HND	504	NLD	31	SVN	386
AUS	61	CZE	42	HRV	385	NOR	47	SWE	46
AUT	43	DEU	49	HUN	36	NZL	64	TTO	1
BEL	32	DNK	45	IDN	62	PAN	507	TUR	90
BGR	359	DOM	1	IRL	353	PER	51	UKR	380
BLR	375	ECU	593	ISL	354	POL	48	URY	598
BLZ	501	ESP	34	ITA	39	PRI	1	USA	1
BOL	591	EST	372	JAM	1	PRT	351	VEN	58
BRA	55	FIN	358	LIE	41	PRY	595	ZAF	27
CAN	2	FRAU	33	LTU	370	ROM	40		
CAR	1	FRO	298	LUX	352	RUS	7		
CHE	41	GBR	44	LVA	371	SLV	503		
CHL	56	GRC	30	MEX	52	SPB	381		

Troubleshooting

INLOOX ERROR MESSAGES

Below is a list of error messages and proposed solutions.
If the problem cannot be solved from here, please refer to our support service, who can be reached online under www.inloox.com/support/

Database-oriented errors

Error message	Solution
Error: The InLoox database is not available. Error on establishing link with the server...	<ul style="list-style-type: none"> • Check that the network is accessible. • Check whether offline configuration, if any, is correct. • Refer to your system administrator.
You are using InLoox client version X.X. The InLoox database version is Y.Y. Please ensure that you are using the appropriate version of the product or refer to your system administrator.	The InLoox client version being used does not match the database version on the server. please update the InLoox client.

Licence-oriented errors

Error message	Solution
The licence code input does not tally with version of InLoox being used.	The licence code you have input is for an earlier or later version of InLoox. More information can be found in the chapter on Licence Management
A licencing error has occurred. Please check the licence code or refer to your system administrator.	The licence code you have input is not valid for the installed version of InLoox. Please request a valid licence code. More information can be found in the chapter on Licence Management
The maximum number of clients has been reached. It is not possible to use InLoox. Please check the licence code or refer to your system administrator.	Your InLoox installation is licenced for a specific number of workstations. This number has been exceeded. Please obtain a supplementary licence for the required number of additional workstations. More information can be found in the chapter on Licence Management

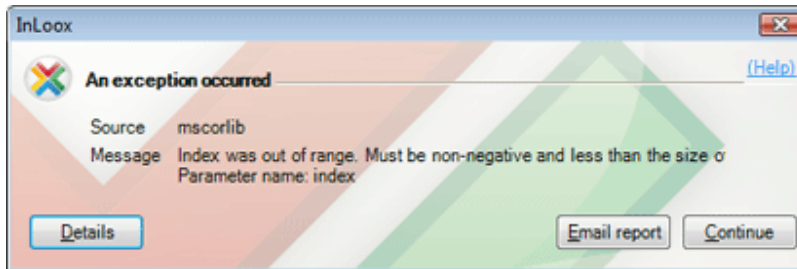
Report-oriented errors

Error message	Solution
<p>The report template contains an error. An expression used in the template is incorrect. Please correct the report template.</p>	<p>Please check the report template with the help of Documentation for the InLoox Report Designer</p>
<p>The report contains no data. Empty reports cannot be created. Please edit the report template.</p>	<p>The report template is empty. Please update the template with the help of the chapter Detailed Information: Configuration: Customizing Report Templates and the Documentation for the InLoox Report Designer</p>
<p>No printer is installed. Please install a printer to output reports.</p>	<p>A printer must be installed to output a report. Please install the driver needed by your printer. For more information please refer to the user manual for your printer.</p>

PROGRAM EXCEPTIONS IN INLOOX

There are certain rare configurations that will cause the software to behave unpredictably. To cater for this we have developed a special message dialog box which permits more accurate examination of the problem. If such an exception occurs in your installation, there are various ways of informing us of it. These options are described below.

InLoox dialog box for exception handling:



This dialog box allows our developers to localize an unpredicted condition more precisely and make future versions of InLoox more stable.

Click on **Details**:



All the exception data that the system has compiled are displayed.

Use the button **Send report by email** to send us the error via your email program.

This mail does not contain any personalized information or database contents, except your sender email address. This allows our technical staff to solve the exception in direct collaboration with you.

This information is sent to our technical staff:

From: exceptionreport@inloox.com Sent: Thu 7/3/2008 10:26 AM
To: exceptionreport@inloox.com
Cc:
Subject: InLoox Exception 5.6.0 (Access deny)

Message: Access deny
Source: InLoox

Application version: 5.6.0
Target site: Void [T](T, IQmedialab.InLoox.Data.BusinessObjects.Project, IQmedialab.Common.Windows.Views.IQDialog, System.Collections.Generic.List`1[System.Windows.Forms.Button])

Stack Trace:
at . [T](T bussinessObject, Project currentProject, IQDialog dialog, List`1 disableButtons)
at . [T](T bussinessObject, Project currentProject, IQDialog dialog)
at IQmedialab.InLooxAddIn.Views.ActionDialog.SecureView()
at IQmedialab.Common.Windows.Views.IQView.OnLoad(EventArgs e)
at IQmedialab.Common.Windows.Views.IQBusinessObjectDialog.OnLoad(EventArgs e)
at IQmedialab.InLooxAddIn.Views.ActionDialog.OnLoad(EventArgs e)
at System.Windows.Forms.Form.OnCreateControl()
at System.Windows.Forms.Control.CreateControl(Boolean fIgnoreVisible)
at System.Windows.Forms.Control.CreateControl()
at System.Windows.Forms.Control.WmShowWindow(Message& m)
at System.Windows.Forms.Control.WndProc(Message& m)
at System.Windows.Forms.ScrollableControl.WndProc(Message& m)
at System.Windows.Forms.ContainerControl.WndProc(Message& m)
at System.Windows.Forms.Form.WmShowWindow(Message& m)
at System.Windows.Forms.Form.WndProc(Message& m)

You can, of course, also contact our Support directly in the usual manner. Please be sure to have the contents of the exception dialog box to hand.

Extending and Customizing InLoox

DETAILED INFORMATION: CONFIGURATION: CHANGING THE LANGUAGE

InLoox is a multilingual system. The operating language adjusts automatically to the **Region and Language Options** in the **Windows Control Panel**. The language can be changed manually during operation of InLoox at any time without the need to restart.

A brief instruction on changing the operating language:

1. Click on the menu **Tools** in the **InLoox Toolbar**
2. Move the cursor to the menu command **Tools >> Language**
3. Select a language, e.g. **German, English, French, Spanish, Italian**, from the list
InLoox changes the language of all screens.

DETAILED INFORMATION: CONFIGURATION: CUSTOMIZING THE INLOOX LANGUAGE FILES

InLoox uses so-called resource files for all texts and messages that it displays. These are located in the program folder on the InLoox client.

Important Notes:

- Changing the files can cause problems with the program, especially if data are deleted.
- When you re-install the InLoox client setup will overwrite any changes you have made to the language files.

List of language files (as delivered)

Filename	Contents
InLoox.resources	Standard language (English)
InLoox.de.resources	German-language version
InLoox.fr.resources	French-language version
InLoox.es.resources	Spanish-language version
InLoox.it.resources	Italian-language version

A brief summary of how to customize the language resource files:

1. Close Outlook on the client concerned.
2. Open the relevant language file with the **InLoox Resource Editor**. This tool can be found in the **Download area** of the **Support Center**.
3. Make the required changes to the file and save.
4. Test the changes on the InLoox user interface.
5. Distribute the file among other InLoox clients as required.

LICENCE MANAGEMENT

At the time of **Installation** you have specified a valid licence code.

The licence code consists of five groups of four alphanumeric characters each in the following format: **1111-2222-3333-4444-5555**

Your licence code is valid as follows:

- for one version of InLoox (**Personal 5.x/Workgroup 5.x/Enterprise 5.x**)
- for a specific number of clients and servers
- for an unlimited time



The following restrictions apply:

- InLoox Personal **cannot** be used as a server
- When the **maximum number** of registered clients (workstations / computers) has been reached, InLoox will no longer function on any clients on which it was last installed or started.
- The licence manager on the terminal server counts the number of **active users** for whom InLoox has been released.

InLoox monitors the permissible number of clients. The following message is displayed to indicate that there are too few licences:

*"The maximum number of clients has been reached. It is not possible to use InLoox.
Please check the licence code or refer to your system administrator."*

The following procedure is needed initially to be sure that only those clients and/or active users on which InLoox is currently installed are counted:

1. Click on the menu command **Tools >> Licence** in the **InLoox Toolbar**
This menu command is only displayed to users with InLoox administrator permission.
2. In the dialog box **InLoox Licence Manager** click on the button **Remove Client Licenses**
3. Click on **OK**

If the error message persists, InLoox must be removed from the excess clients or additional licenses acquired. Please refer to your reseller or the manufacturer for this. You will receive by return a license to release the required number of clients for operation of InLoox.

Personal Views / Workflows

DETAILED INFORMATION: CONFIGURATION: HINTS ON PERSONALIZED VIEWS

InLoox provides many options for sorting and organizing data. Furnishing your projects with personalized views is particularly easy and quick. These help the flexible display of data.

 **Hint:** How to change a standard view:

- It is possible to add and delete columns in the Project Overview. If a required aspect of the data is missing, simply add the corresponding field:
 1. Click on the column **Number** in the **InLoox Project Overview** with the right-hand mouse button
 2. Click on the menu point **Choose Fields**
*The dialog box **Choose Fields** is displayed*
 3. Click in a field, e.g. **Customer**, hold the mouse button down and drag the field next to the column **Number**
Two red arrows are displayed
 4. Add the field to the view by simply letting go the mouse button.

 **Further hints:**

- All features provided by Outlook for sorting, grouping and filtering can be used in the InLoox Project Overview. Click for example on a column to sort by it or drag the column into the area above the column headers to set up a grouping
- Create new views and offer them to all users, e.g. **Open costs**, **Projects by Customer** or **Projects by Status**. Instructions can be found in the chapter on Defining Views
- Define individual **filters** for all users, e.g. by **project status**. This is a way to transact simple workflows. Example: The development department staff only sees projects with the status **development**. If the status changes to **Bill**, the project becomes visible to accounting staff; for other persons the project remains hidden. Instructions can be found in the chapter on Finding projects under "**Filter**"

DETAILED INFORMATION: CONFIGURATION: GENERATING PERSONALIZED VIEWS

InLoox provides many options for sorting and organizing data. Furnishing your projects with personalized views is particularly easy and quick. These help the flexible display of data.

Use of a personalized view is as follows:

1. Click on the button **InLoox Folder** in the **InLoox Toolbar**
Outlook switches to the InLoox Project Overview
2. Click on the list **Current View**
3. Select a view from the list, e.g. **Project Controlling**



Hints on the customizing of views can be found in the chapter on Hints on Personalized Views

The following views are included in **InLoox** as standard:

Name	Appearance/Filter/Grouping	Purpose
Active Projects	Filter; all non-completed projects	To show all active projects, for example to create turnover lists or support customers
Inactive Projects	Filter; all completed projects	To inspect archived project records
Projects by Category	Grouping; all projects grouped by the field Category	Helps to maintain overview as projects multiply
Projects by Status	Grouping; all projects grouped by the field Status	Displays internal procedure
Projects by Project Manager	Grouping; all projects grouped by the field Project Manager	Displays internal responsibilities and allocated projects
Projects by Customer	Grouping; all projects grouped by the field Customer	Displays external responsibilities and allocated projects
Negative Gross Result	Filter; all projects in which the total costs are higher than the invoices rendered	To identify losses and determine financing requirements
Open Calculations	Filter; all projects with open budgets of type Calculation	To determine turnover potential and follow up on offers

Legal Notices and Agreements

END USER LICENSE AGREEMENT (EULA)

License Terms of IQ medialab GmbH

End-User License Agreement (EULA)

By using this Software Product (including installation and copy) you declare that you agree with this Agreement as a natural person and legal entity. If you do not agree with this EULA you are not entitled use the Software.

§ 1 Validity of the Terms of Agreement

(1) This End User License Agreement (EULA) is concluded between you – hereinafter also referred to as Customer – and IQ medialab GmbH – hereinafter also referred to as IQ medialab . The licensing / purchase of Software and obligations precedent to the Agreement shall exclusively be subject to the Terms of Agreement unless otherwise agreed. We exclusively refer to the regulations of the General Terms of Business of IQ medialab which are integrated into this Agreement and form an essential part of it. The Customer confirms that he has taken note of the General Terms of Business of IQ medialab. The regulations of the General Terms of Business are extended and/or supplemented by the objective License Terms of IQ medialab with regard to the use of software and other software-specific regulations and the corresponding rights and obligations. In case the General Terms of Business of IQ medialab deviate from this Agreement or if they are inconsistent with it, these License Terms shall prevail.

(2) IQ medialab licenses/sells the enclosed Software to the Licensee (Customer) exclusively on the basis of the License Terms hereinafter. In case you do not agree with these Terms, do not open the package or seal of the Software, refrain from installing the Software, click on the “No” button of the installation process and uninstall the Software when the corresponding inquiry occurs during the installation and return the properly purchased Software together with packaging, license key and receipt voucher to the Software vendor within 30 days of the purchase of the Software. Subsequently, you will receive full reimbursement of the purchase price you paid.

§ 2 Subject Matter of the Agreement

(1) Subject matter of this Agreement is the granting of the rights of use in accordance with §3 depending on the type of license purchased in each case and its extent of functions. By purchasing this Software you become the owner of the Software storage medium (e.g. a CD-ROM), but not of the Software itself. The Software is licensed, not sold. The Software shall always remain the intellectual property of IQ medialab. As a purchaser of the Software you shall only be entitled to use the proprietary object, i.e. to use the Software as agreed upon. IQ medialab grants this right of use in the form of a license.

(2) The Customer has checked whether the Software specification meets his desires and requirements before concluding the Agreement. He knows the essential functional qualities and conditions of the Software.

(3) Product descriptions and presentations in test programs are service descriptions but are not warranties. Warranties require a written statement from IQ medialab company management.

(4) The Customer is not entitled to receive a license for the source program.

(5) IQ medialab renders all deliveries and services in accordance with the state-of-the-art.

(6) IQ medialab reserves all rights which are not explicitly mentioned in this EULA.

(7) If the Software is marked “Not for resale” (or “Nicht zum Weiterverkauf bestimmt”) in any way it may neither be resold nor transferred.

(8) The Software may then be exclusively installed on a network server if the License purchased by the Customer is explicitly designated as “server license”. In the event that the Software is used in a network the Customer must ensure that there is a License for each data processing unit having access to the server and the possibility to use the Software.

(9) The software is licensed as a whole. You may not separate its components and/or use it for distinct application on more than one computer other than described in the software user documentation.

§ 3 The Customer's Rights to the Software

(1) The Software, all additional programs, the symbols used, IQ medialab logo, written documents as well as documentation are legally protected. The copyright, patent rights, trademark rights and all other rights in goods and services as well as industrial property rights to the Software and other above-mentioned objects which IQ medialab makes available or hands over to the Customer as part of the process to set up and implement the Agreement are the exclusive property of IQ medialab in the relationship of the Parties. Should third parties be entitled to any rights, IQ medialab shall have the corresponding rights of use.

(2) The Customer purchases the Software in order to use it for his own purposes on a permanent basis (non-exclusive license). The Customer is entitled to use the quantities of Software for which he purchased licenses. The Customer shall ensure that the number of copies of the Software installed simultaneously corresponds to the maximum number of purchased licenses. IQ medialab hereby grants the Customer the right to use the programs which are necessary for these purposes as well as the right to copy programs on the main memory and hard disks as well as the right to correct errors. The Customer is entitled to make backup copies of the programs necessary for safe operation. The backup copies must be marked as backup copies. Copyright notes must not be deleted, changed or suppressed. The Customer may exclusively use the Software for each license on a standalone computer, no matter if it is a workstation, notebook or PDA except in such cases where he purchases a network license. The use of the Software also implies loading the Software into the temporary memory of a computer or similar object or installing the software on a permanent storage medium (e.g. hard disk, DVD, CD-ROM, or similar). However, the Parties may come to differently worded agreements in an individual Agreement issued in writing.

(3) A user manual and any other documents possibly provided by IQ medialab may only be copied for the company's internal purposes.

(4) The Customer shall not be entitled to transfer the Software without the written consent of IQ medialab; this applies in particular in the event of sale. IQ medialab shall agree to the passing-on of the Software (in whole or in part) to a third party under the following conditions:

– The Customer hands over the original data storage media (if there is one), this EULA and the General Terms of Business of IQ medialab to the third party, deletes all other copies in particular on data storage media, in read-only memories or main memories, he definitely stops using the Software and submits a written confirmation of the fulfilment of his duties to IQ medialab.

– The third party declares to IQ medialab in writing that it has received the aforementioned components and acknowledges them as binding in the legal relationship with IQ medialab, noting the General Terms of Business and this EULA.

– There are no important opposing reasons.

(5) All other acts of utilisation, in particular leasing, industrial sale (unless explicitly stated otherwise by written reseller agreement/authorised dealer agreement), lease and distribution of any tangible or intangible property are prohibited without the prior written consent of IQ medialab. IQ medialab notes, that customers who violate copyright laws, are liable for all damages that occur as a result of these copyright law violations.

(6) Any subject matter of the Agreement, documents, proposals, test programs, etc. of IQ medialab to which the Customer gains access after conclusion of the Agreement shall be considered intellectual property and must be treated confidentially as a business and company secret of IQ medialab in accordance with § 9.

§ 4 Contractual Obligation and Termination of the Agreement

In the event of termination due to infringement of this EULA you are obliged to return or destroy all original versions and copies of the Software and all other components and to notify IQ medialab of the destruction in writing.

§ 5 Obligations of the Customer

(1) In the event that you are a business owner you undertake to inspect all delivery items of IQ medialab immediately upon receipt of the goods in accordance with the regulations of commercial law (§ 377 of the German Commercial Code) and to make complaints in respect of defects with an exact description of the defect, submitted in writing. Each Customer is obliged to test all modules with regard to usability in the concrete situation before starting any operative use. This also applies to programs the Customer receives in the context of supplementary performance or a possible maintenance agreement.

(2) The Customer shall take adequate precautions to counter situations where the program does not operate properly in whole or in part (e.g. by data backup, error diagnosis, regular check on the results). The Customer shall be responsible for ensuring the operation of the working environment of the program. He shall be obliged to carry out the necessary adjustments to his firewall, virus scanners or similar data protection mechanisms in his network as well as his server. IQ medialab shall not bear the risk of incompatibility of the Software with the software or hardware used by the Customer.

(3) You shall not be entitled to use or modify the logo and/or trademarks of IQ medialab unless the company management of IQ medialab has given its prior agreement to the use or modification of the logo in writing.

(4) Subject to the provisions of § 69 e German Copyright Act (UrhG) you may not reverse engineer, decompile or disassemble the Software.

(5) You undertake to indemnify and defend IQ medialab from all claims of third parties, including reasonable lawyers' fees arising or resulting from any use of this Software against the agreement.

§ 6 Warranty

1. Delivered software possesses the agreed-upon characteristics, is suitable for the applications assumed by the contract and which are otherwise standard, and has usual quality of software of this type. Not every flaw which is connected with the software is a defect which implies warranty rights. An impairment in the software's functioning which results from hardware defects, environmental conditions, improper operation and the like, is not a defect. An insignificant deterioration in quality will not be taken into account. IQ medialab guarantees that no rights of third parties are violated through the use of the software by the customer in accordance with the provisions of the contract.

2. Customers who are consumers within the meaning of § 13 German Civil Code (BGB) have in respect to defects of the purchased good the rights set out in the German Civil Code (BGB). In case that a consumer is entitled to claim damages hereafter, § 7 applies accordingly.

3. In all other cases of liability for defects the following terms apply:

a) IQ medialab may first attempt to remedy any material defects. IQ medialab may choose to remedy the defect by eliminating it, i.e. also by demonstrating possibilities by means of which the effects of the defect can be avoided, or through delivery of a program which does not contain the defect. An equivalent new program version or the equivalent previous program version which had not contained the faults is to be accepted by the customer, when this is reasonable. In the case of defects in title, IQ medialab shall give the assurance that it will provide the customer with legally unchallengeable option to use either the software or equivalent software, at its option.

b) The customer shall support IQ medialab in the analysis of faults and removal of defects by specifically describing problems which occur, providing IQ medialab with complete information and granting it the necessary time and opportunities to remove the defect. IQ medialab may also remove the defect on-site or at its place of business, at its discretion. The performance of IQ medialab may also take the form of remote maintenance. The customer must ensure the necessary technical prerequisites at his own expense and, after due prior notification, provide IQ medialab with access to his computer equipment.

c) IQ medialab may levy additional charges, when the software is modified, employed outside the environment provided for or incorrectly operated. It may demand compensation if no defect is found or if it is incorrectly/insufficiently informed of a fault. The burden of proof lies with the customer in accordance with § 254 German Civil Code (BGB).

d) If IQ medialab ultimately refuses to remedy the defect, if it ultimately is unsuccessful or if this is unreasonable for the customer, he may withdraw in writing from the contract or correspondingly curtail the payment and in accordance with § 7 demand damages or reimbursement of expenses.

e) Insofar as the above has not been otherwise agreed, further liability on the part of IQ medialab within the meaning of liability for defects is excluded. In particular, liability for defects does not apply if and to the extent that the software is improperly used by the customer or used in a defective or incompatible hardware or software environment. The same applies in the event that the customer undertakes unauthorised modifications of the software.

g) The statute of limitation for claims for defects is one year as of the statutory commencement of the limitation period.

§ 7 Liability

The following limitations of liability apply in case of claims for damages of the customer arising from liability for defects or from any other reasons:

1. IQ medialab is liable for intent and gross negligence in accordance with the statutory provisions. The same applies to injury of life, body or health as well as to claims arising from warranties or from the German Product Liability Act (Produkthaftungsgesetz, ProdHaftG).
2. Moreover, IQ medialab is only liable for culpably infringing contractual obligations the fulfilment of which renders a correct execution of the contract possible, and the customer can always trust on said material obligations being observed (cardinal obligation). This includes, in particular, the obligation to fulfil a performance free from defects. In this case IQ medialab's liability is limited to the loss or damage foreseeable upon conclusion of the contract.
3. A further liability of IQ medialab is excluded.
4. Should the liability for damages on the part of IQ medialab be excluded or reduced, this shall also apply with regard to personal liability for compensation for damages on the part of its employees, representatives and persons employed in auxiliary tasks.
5. The right to contest the charge of contributory negligence remains open to IQ medialab. It is pointed out to the customer that, within the framework of his obligation to exercise diligence, before using the software for the first time, he must test whether the installation of the software might lead to particular interference with pre-installed software, and that he must further ensure back-up of his data before the first installation as well as during the course of operations and, in the case of a suspected fault in the software, that he implements all additional reasonable measures required for security.
6. The statute of limitation for claims of the client who is not a consumer is one year as of the statutory commencement of the limitation period.

§ 8 Software Updates and Upgrades

At the sole discretion of IQ medialab, users may be provided with updates and upgrades to the Software. IQ medialab retains the right to provide upgrades for a fee. Upon installation of an upgrade, users shall not use, separate or transfer the previous version to a third party separately. Unless IQ medialab provides other terms and conditions with an update or upgrade, the terms and conditions of this EULA shall continue to apply. Users may refuse to accept an update or upgrade. However, upon release of an update or upgrade, IQ medialab may have no further obligation to support the previous version.

§ 9 Start and End of the Customer's Rights

- (1) The ownership of the supplied items and the rights in accordance with § 2 and § 3 shall not be transferred to the Customer until complete payment of the purchase price. Before that, he only has a preliminary right of use in accordance with the law of obligations, revocable in accordance with § 9 (2).
- (2) IQ medialab shall be entitled to revoke the rights in accordance with § 2 and § 3 for important reasons, in particular for the reasons specified in § 3 of the General Terms of Business of IQ medialab or to terminate the Agreement respectively. An important reason particularly exists if the Customer does not effect the due payment, if he continues to infringe the obligations under § 2 and § 3 of this Agreement in a substantial way, despite written reminders, or in the event that a petition of bankruptcy has been filed in respect of the customer's assets.
- (3) If the right of use in accordance with § 3 in conjunction with § 2 does not occur or if it should end, IQ medialab shall be entitled to demand from the Customer the return of the provided goods or demand a written assurance that they have been destroyed and that all copies have been destroyed, along with the written assurance that this has been effected.

§ 10 Secrecy

- (1) The Contracting Parties undertake to treat all objects they receive from the other Contracting Party or objects they gain knowledge of (e.g. software, documents, information) which are legally protected, contain business or company secrets or are designated as confidential, confidentially - even beyond the expiration of the Agreement, unless these objects are publicly known without any infringement of the obligation of secrecy. The Contracting Parties shall store and save these objects in such a way that any unauthorised access by third parties is excluded.

(2) The Customer permits access to the subjects of the Agreement only by his personnel or third parties requiring access in order to perform their assigned tasks. He shall inform these persons about the need for these objects to be kept confidential.

§ 11 Applicable law, legal venue

The law of the Federal Republic of Germany shall be applicable, excluding the United Nations Convention on Contracts for the International Sale of Goods. The place of performance and legal venue for all disputes arising from and in connection with this Agreement shall be the registered office of IQ medialab GmbH (Munich , Bavaria) for agreements with business owners (traders). This also applies if the customer does not have a general place of jurisdiction in Germany or if his place of residence or usual abode is unknown at the time the proceedings are brought forth.

§ 12 Safeguarding Clause

If any provision of this Agreement should be or become invalid, such invalidity shall not affect the validity of the other provisions of this Agreement even if essential provisions are concerned. The Parties agree to replace the invalid provision by a legally effective regulation which comes as closest to the contractually stipulated legal and economic intent of the invalid provision and ensures the operability of the Agreement in the sense of what both Parties had intended. The same shall apply in the event that the Parties have not discovered a gap in the provisions at the time the Agreement was concluded or if such a gap becomes known or occurs later. In that case, the Parties shall be obliged to generate a written supplement to the Agreement in the sense of the aforementioned.

Date: 2007-04-12

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Important notice: This software program is protected by copyright law. Unauthorized copying or sale of this software program or part thereof is punishable by law and will be prosecuted at both civil and criminal level and can result in severe punishment and claims for damages.

TROUBLESHOOTING

Microsoft Outlook is a highly sophisticated product which is constantly under development. With ongoing Office and security updates, Exchange Server service packs and new versions of Windows, there is a wide range of supported platforms for InLoox.

Solutions for error messages are to be found under InLoox error messages.

Customers of IQ medialab, the manufacturer of InLoox, have access to a comprehensive, up-to-date support service for the entire range of InLoox products. Support service can be reached online under www.inloox.com/support/

Note:

- Please have your **customer number** to hand.
- You can also contact the manufacturer directly.

TRADING PARTNERS

Would you like to include **InLoox** in your portfolio? As an **InLoox partner** you will, of course, be a reseller of software licences in the classical sense. But much more than this, you will also be providing consulting, after-sales, training, customizing, development and system integration services. We are offering a product of high quality with an excellent price/performance ratio, targeted at a broad and highly-challenging market.

InLoox is a product of the Munich-based company IQ medialab GmbH. We are pleased to support our partners with marketing and sales documentation, training, and technical services and support. If you are interested in a partnership with IQ medialab, we will be very glad to hear from you. Our normal office hours are 9:00 am till 5:00 pm, Mondays to Fridays. Please note that we are in the CET time zone (GMT+1).

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